

User Guide

Forms R-5.0

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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
Forms 5.0	February 17 th , 2020	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.
- From Settings and Properties.
- 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 the 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

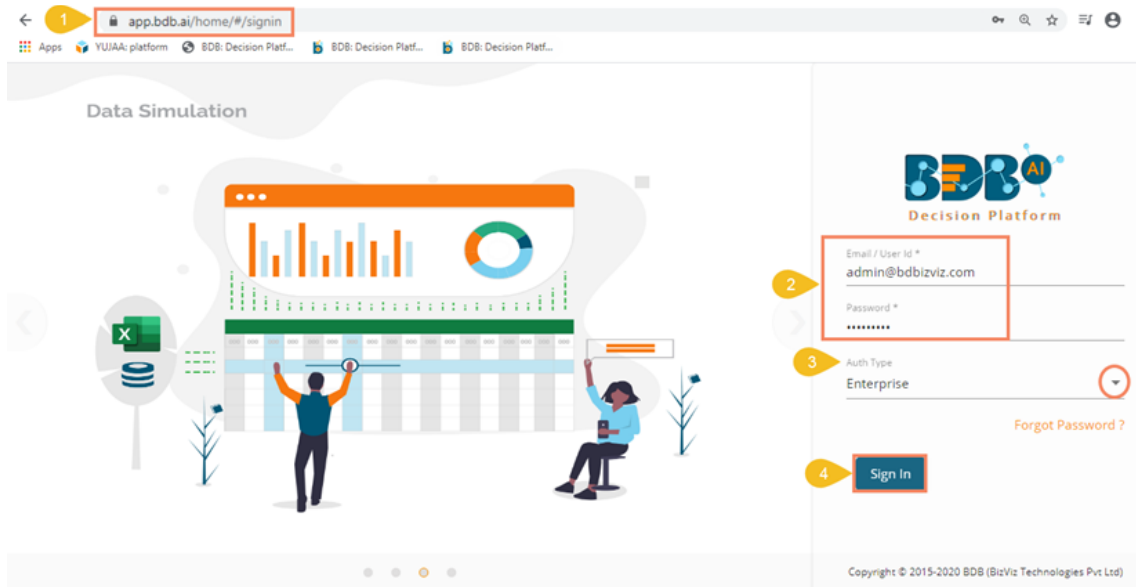
The BDB Platform is a web browser-based application. The users can run the BDB Platform and its various plugins on the below given versions of the browsers:

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

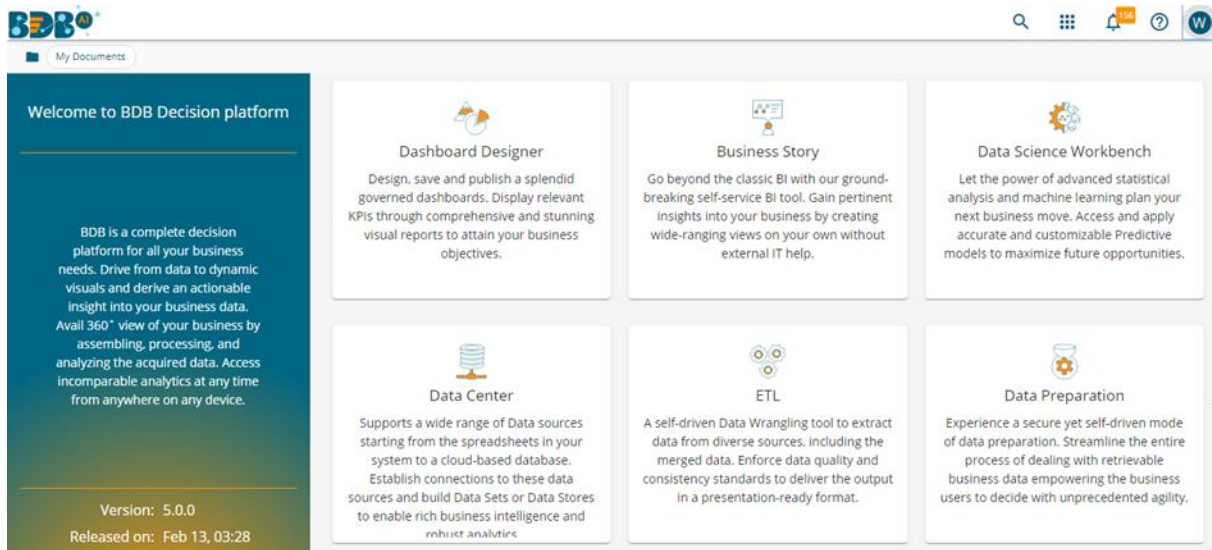
3. Getting Started with the BDB Forms

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.




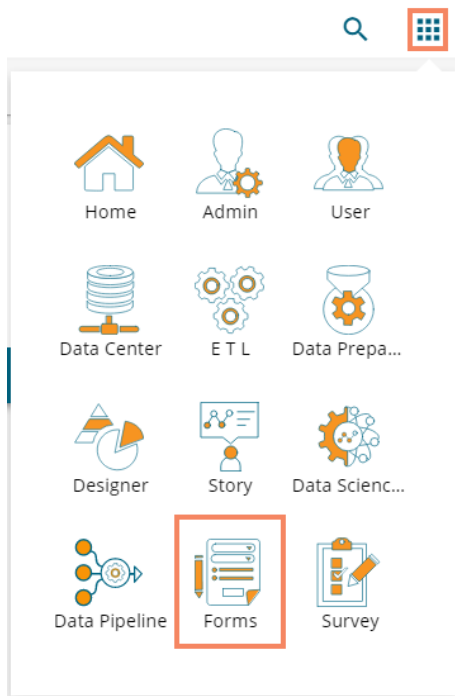
- v) BDB Platform homepage opens.



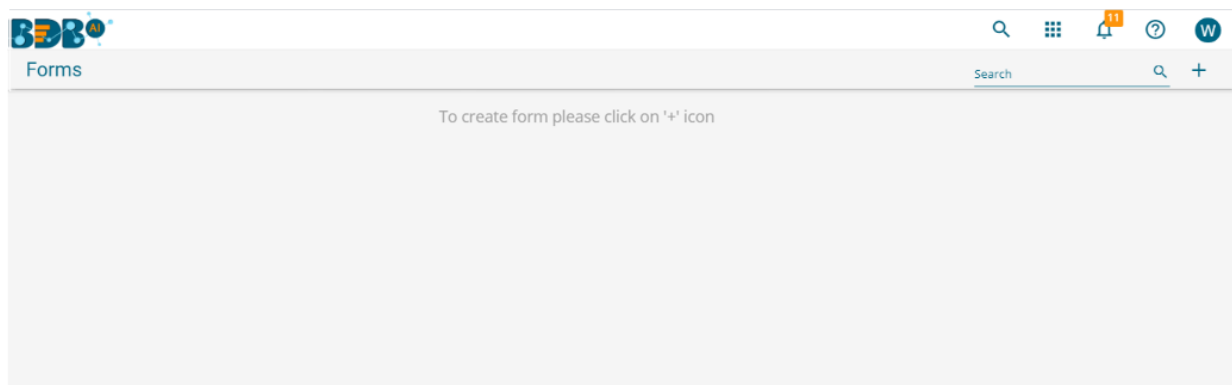
Note:

- 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 'Forms' plugin.



- ix) The landing page of the Forms plugin opens.

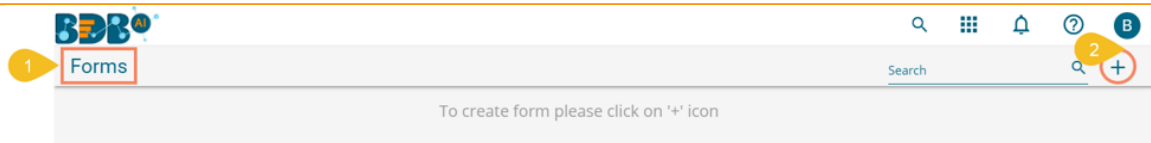


4. General Workflow for Forms

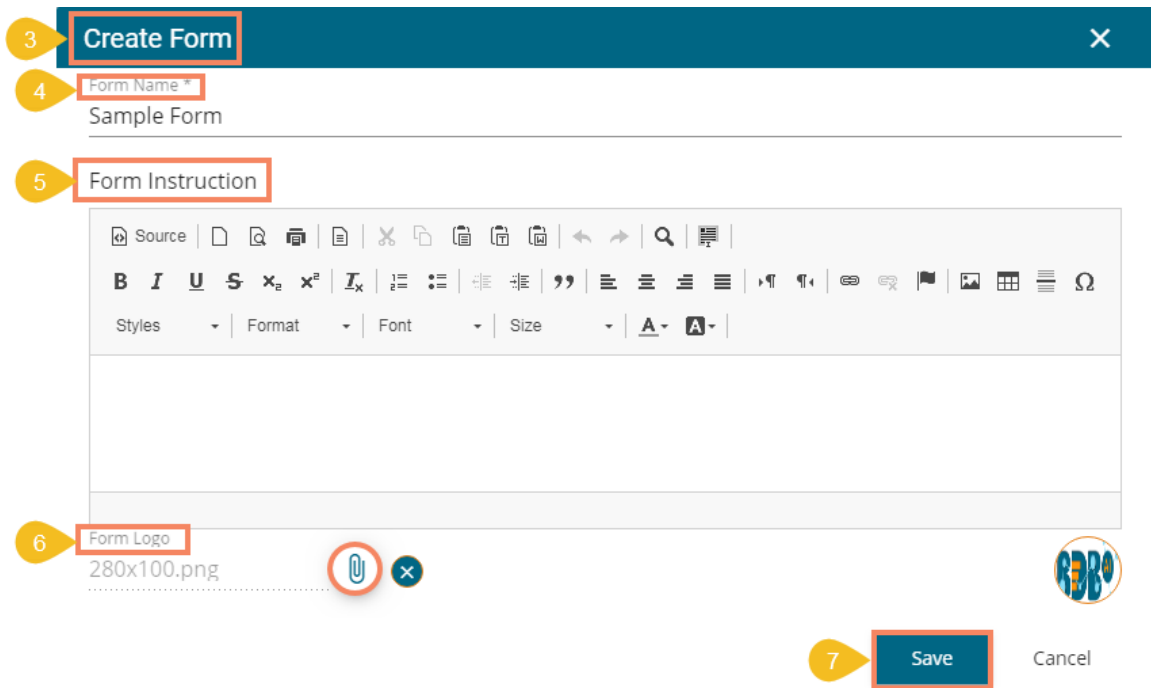
4.1. Creating a Form

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

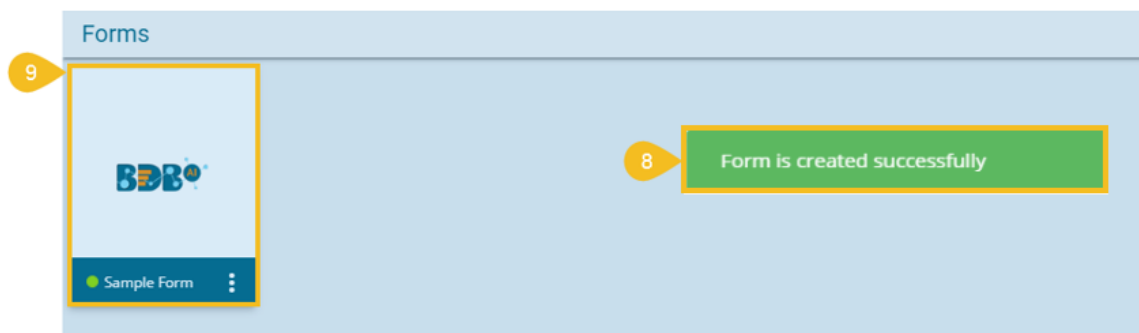
- i) Navigate to the Form landing page.
- ii) Click the 'Create Form' icon.



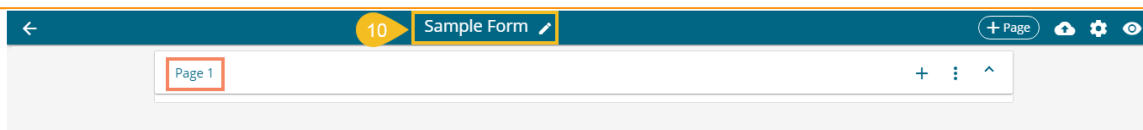
- iii) The **'Create Form'** window opens.
- iv) Form Name: Provide a title for the Form.
- v) Form Instruction: Insert a Form Instruction for all the users who access the Form.
- vi) Form Logo: Attach an image to be used as Form logo (The image file should be less than 50 KB).
- vii) Click the **'Save'**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



- viii) A success message appears.
- ix) The newly created form gets added to the Form Landing page.

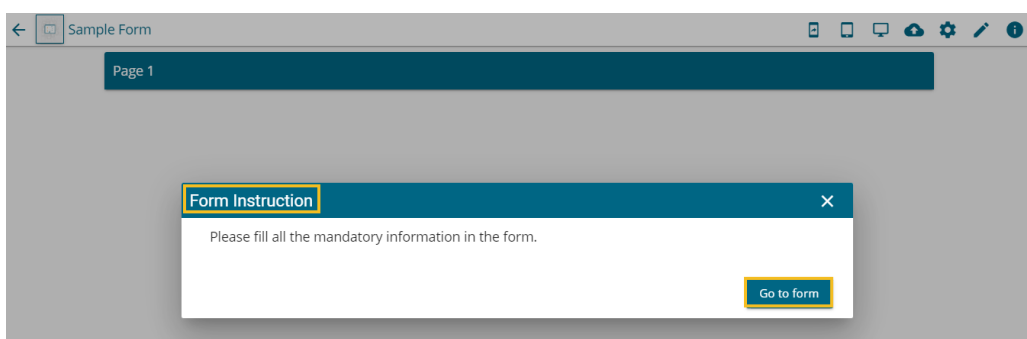


- x) The user gets redirected to the landing page of the newly created form to add a new page (by default).



Note:

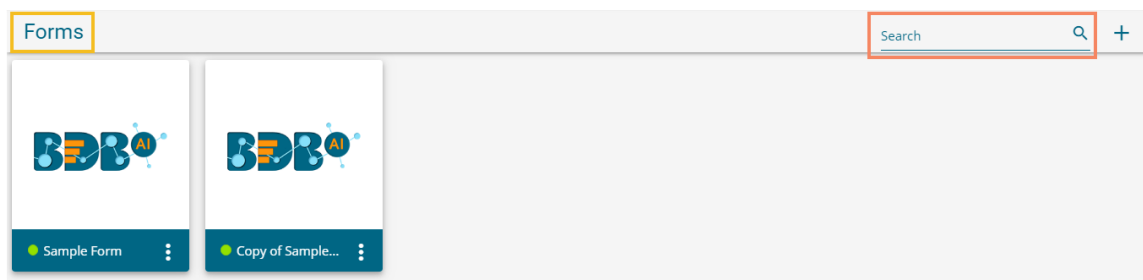
- a. The user needs to click the newly created Form tile to open the Form landing page (it opens by default for the first time after creation).
- b. The inserted Form Instruction appears by default in a pop-up window while opening that form in the preview mode (as shown in the below image). Click the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



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.

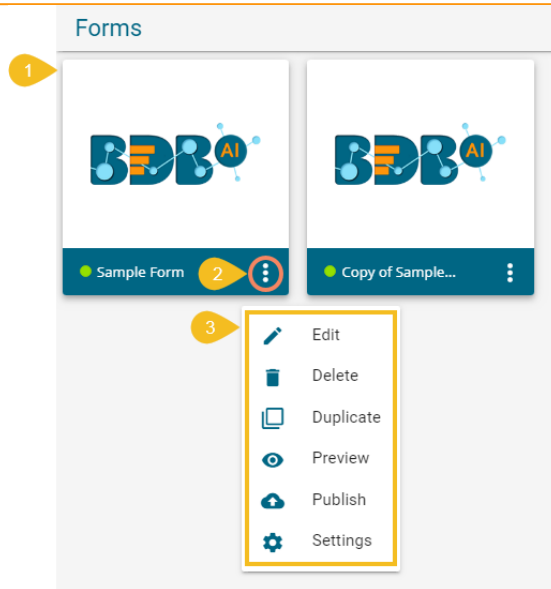
- i) Navigate to the Form Landing page.
- ii) All the created form tiles get listed over here.
- iii) The user can search for a specific form by using the Search Bar.



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 displays 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.

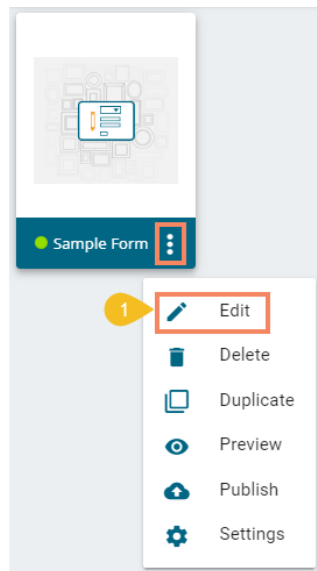


- iv) The user can select a specific option from the context menu to open and apply it to the selected Form.

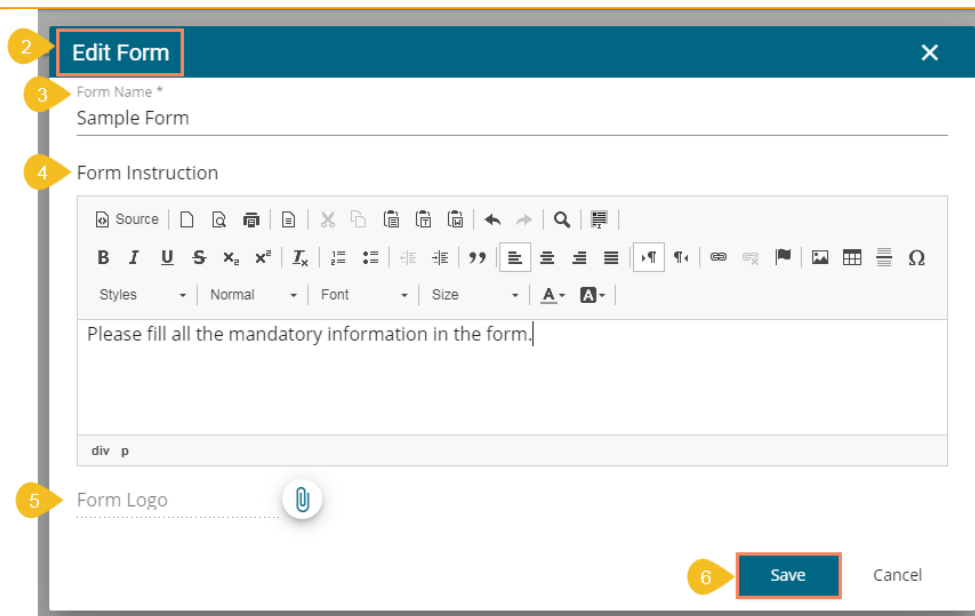
4.2.1.1. Edit

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

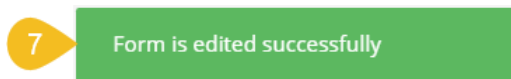
- i) Click the **'Edit'** option from the Options Context menu.



- 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.



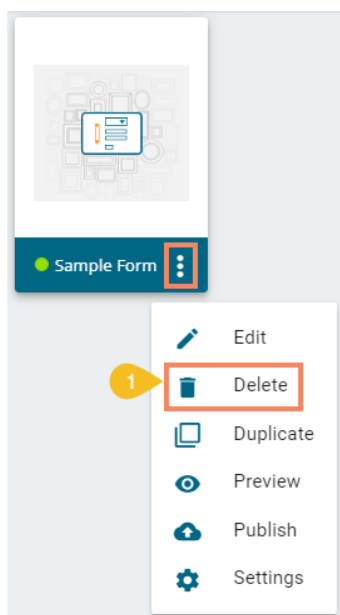
iii) The selected Form gets edited a success message appears to assure the same.



4.2.1.2. Delete

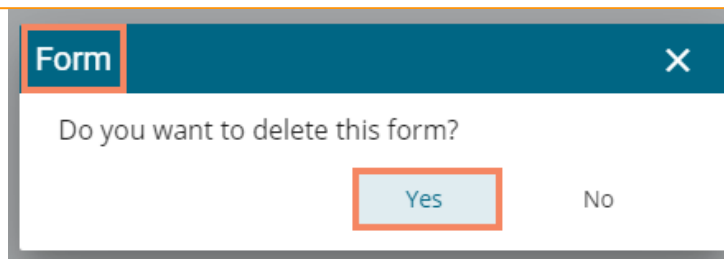
Follow the below given steps to delete a form from the Form List:

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

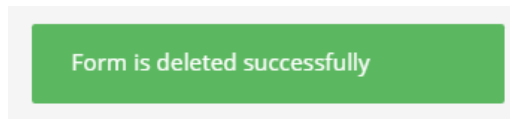


ii) A pop-up window appears to assure the action of deletion.

iii) Click the '**Yes**' option using the pop-up window.



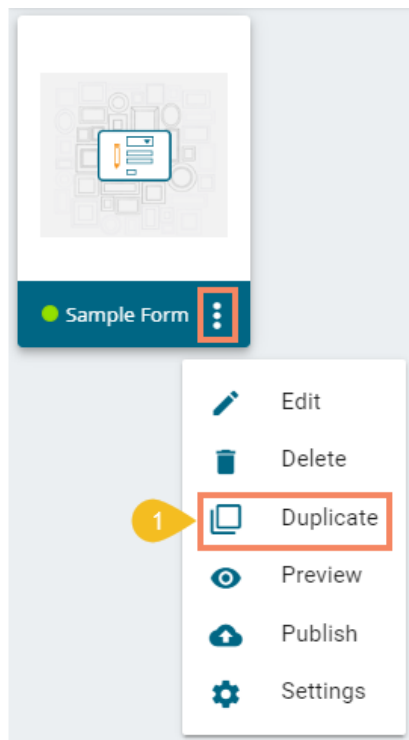
- iv) The selected Form gets removed from the Form list, and the action gets communicated through a message.



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.

- 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.

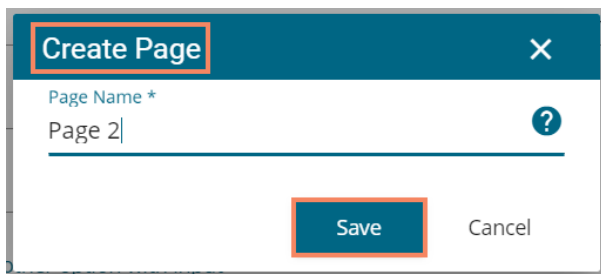
Note: **Preview, Publish, Form Settings** Options are explained respectively under the **4.4, 4.5, and 4.7** sections of this document.

4.3. Form Page Component

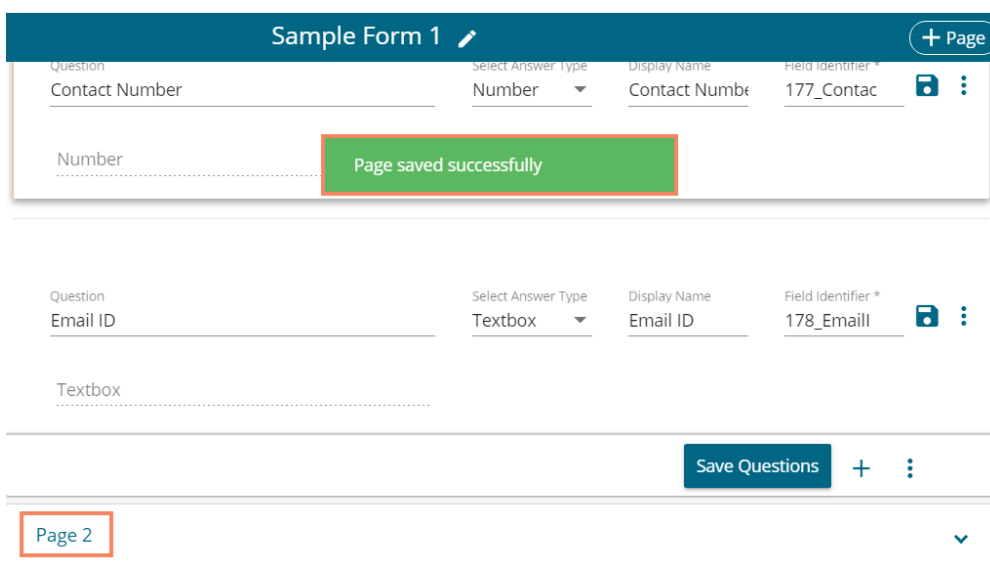
This section aims at describing the various components provided on the page.

- i) Click on the Form tile to open the page component (Page 1 opens by default).
- ii) Click the 'Add New Page' icon.

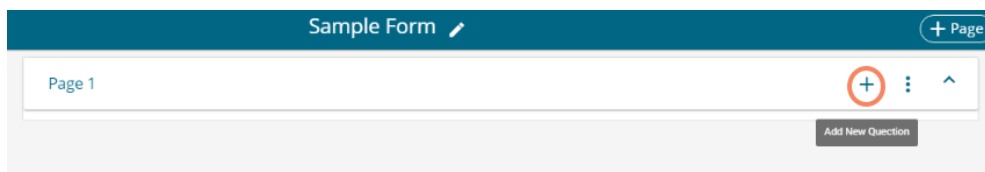
- iii) The **'Create Page'** dialog box opens.
- iv) Click the **'Save'** option.



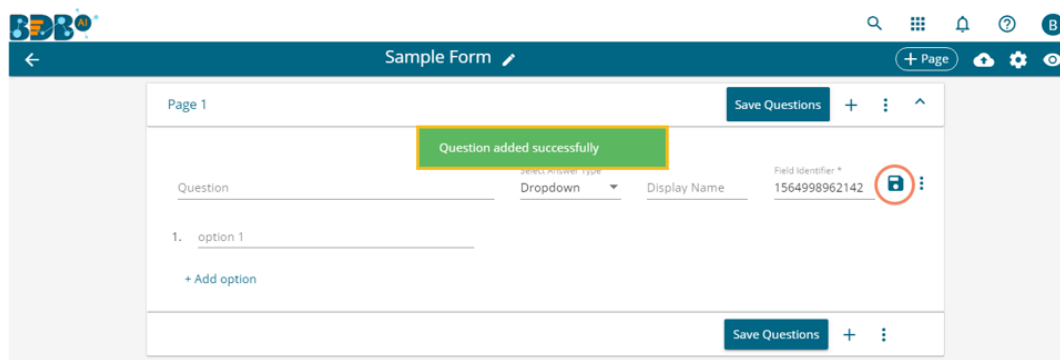
- v) A new page gets added to the form.





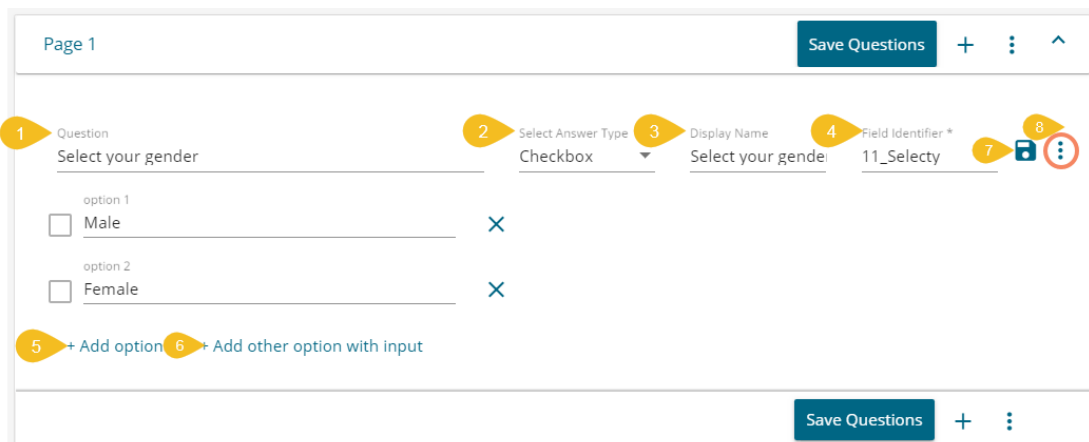
- vi) Click the **'Add New Question'** icon.



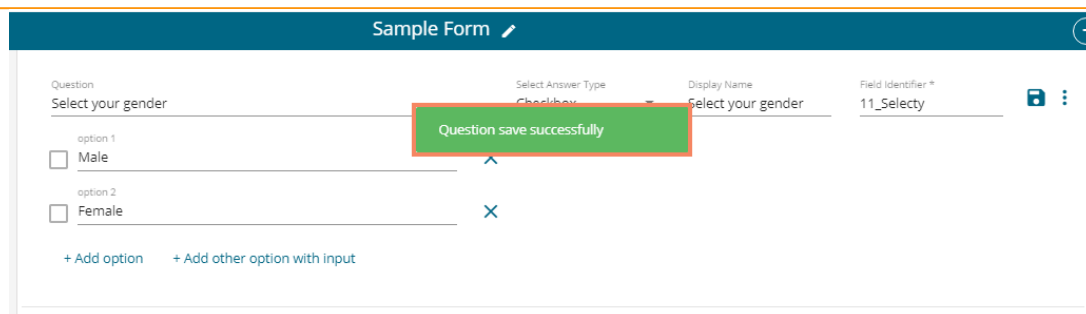
- vii) A success message appears, and a new question gets added to the Form.



- 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. Radio Button
 2. Checkbox
 3. Dropdown
 4. Multi-Select dropdown
 5. Textbox
 6. Number
 7. Textarea
 8. Date Picker
 9. Time
 10. Email
 11. Password
 12. HTML Editor
 13. Attachment
 14. Label
 15. Group Question
 - c. Display Name: Displays the inserted question text.
 - d. 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.
 - e. Option: Provide relevant option
 - ii) Use the '**Add option**' button to add more options
 - iii) Use the '**Add other option with input**' after adding more than 2 options.
Note: These options appear only for Radio Button, Checkbox, Drop-down, Multi-Select Dropdown answer type.
 - f. Click the '**Question Save**'  icon to save the question information.
 - g. Question Settings: Click the  icon to get the Question Settings.

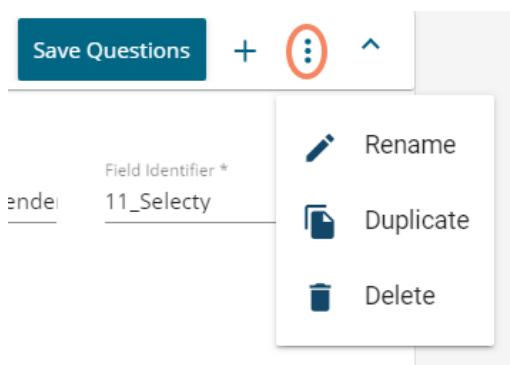


- h. The newly added question gets saved, and a success message appears confirming the action.

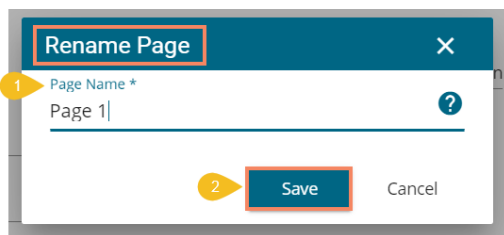


4.3.1. Page Settings

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:

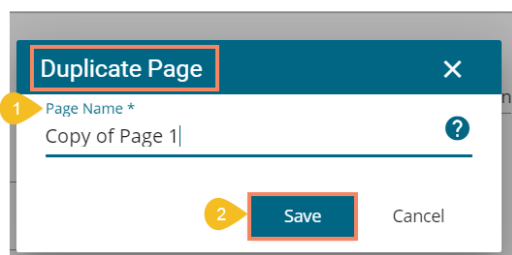


- iv) **Rename:** Prompts a dialog box to rename the selected page.
 1. Provide a new name for the page.
 2. Click the 'Save' option.

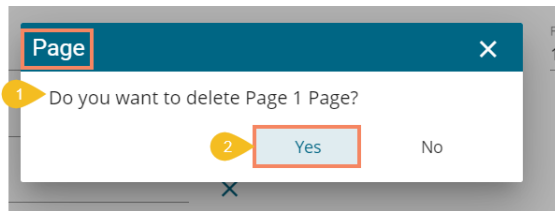


- 3. The selected page gets renamed.

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



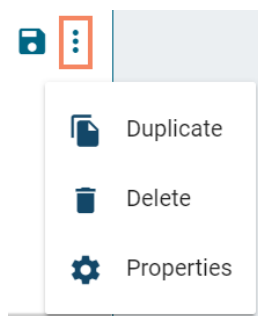
- vi) **Delete:** Prompts to delete the selected page.
 1. A new window opens, asking to confirm the action of deletion.
 - a. Click the **'Yes'** option if you wish to delete the page.
 - b. Click the **'No'** option if you wish not to delete the page.



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

4.3.2. Question Settings

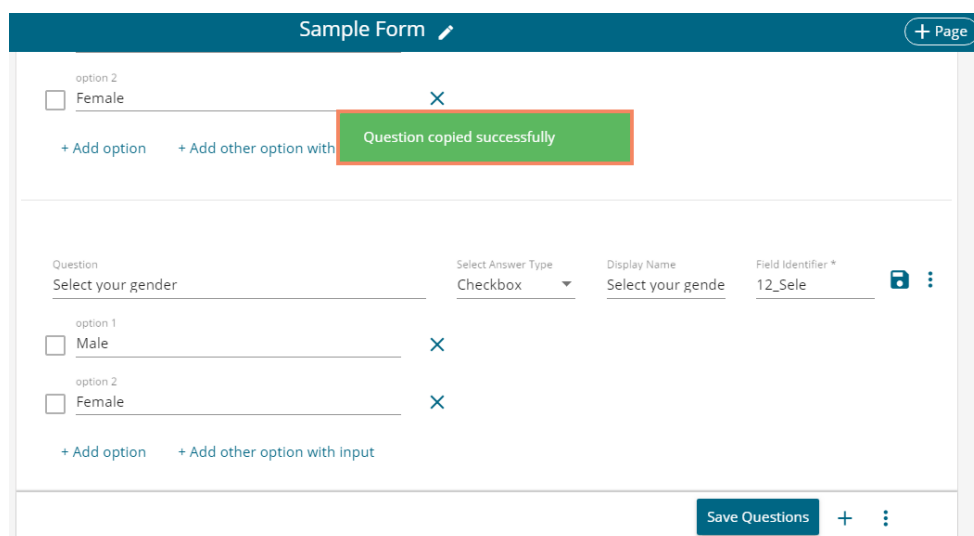
The users get the **'Question Settings'** icon next to the Question Save icon for the selected question. By clicking the Question Settings icon, 3 settings options for a question get displayed:



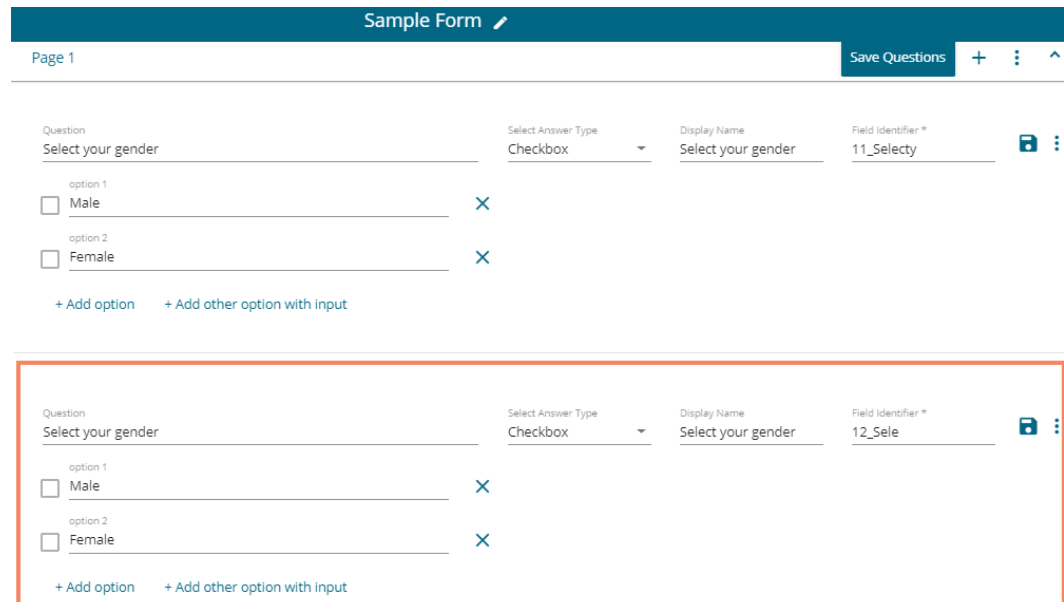
4.3.2.1. Duplicate a Question

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.



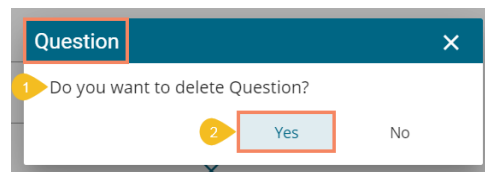
3. The copied question gets added below the selected question as mentioned in the below image:



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 you wish to delete the question.
3. Click the **No** option if you wish not to delete the question.

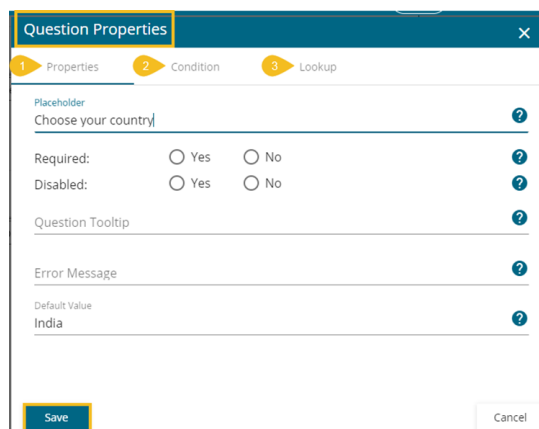


4. Based on the selected option, the question either remains or gets removed.

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:



a. Properties

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

Mention your religion.

Placeholder text

Submit

- 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 the ‘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.

Mention your religion. *

Placeholder text

*Required

Question Tooltip

- 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

Prefix example \$,@,& ?

\$

Postfix example \$,@,& ?

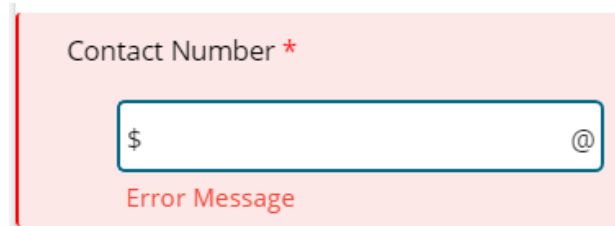
@

Default Value ?

|

Save Cancel

The preview page describes:



- 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.

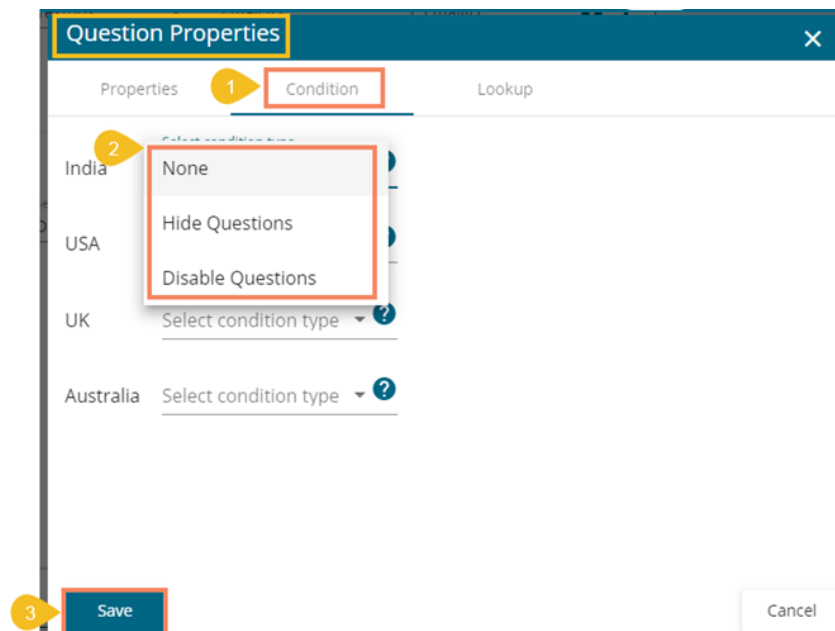
Email ID

An input field for 'Email ID' containing the text 'abc@xyz.com'. To the right of the field, the character count '11 / 25' is displayed.

b. Condition

Select the type of conditions you want to add to 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.



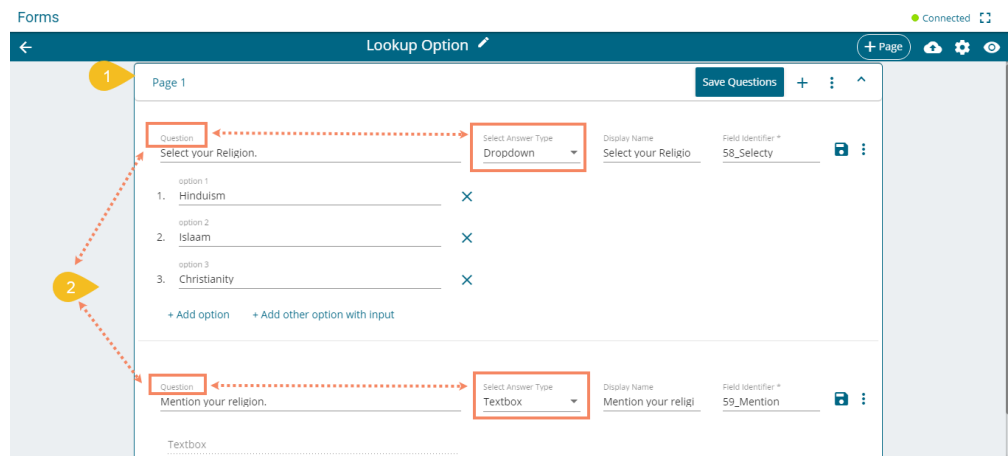
- iv. The selected condition gets applied to the question.

c. Lookup

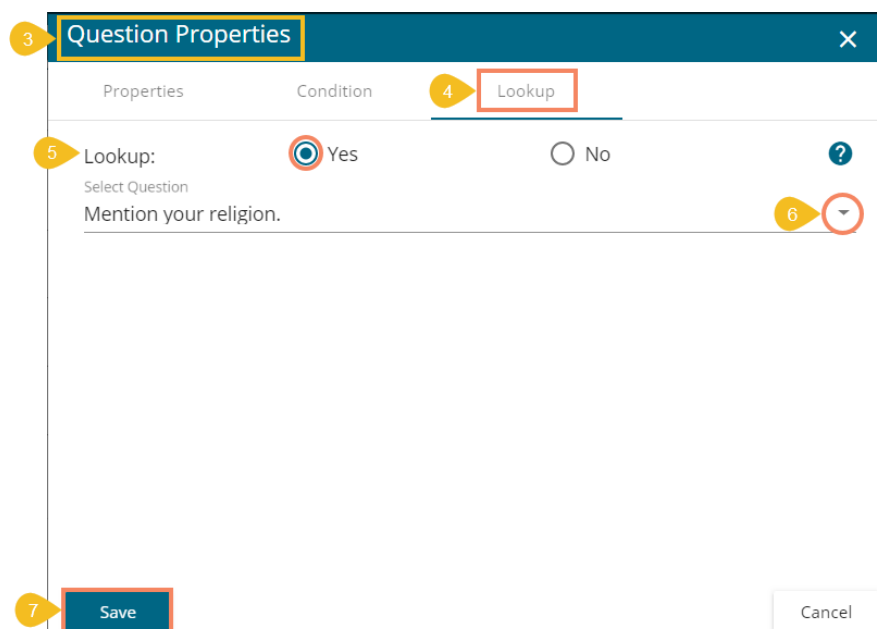
The Lookup tab allows the user to get a lookup option for the Answer types like Radio Button, Checkbox, Dropdown, and Multi-select dropdown. The lookup option can be a saved response to any of the Textbox type questions.

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

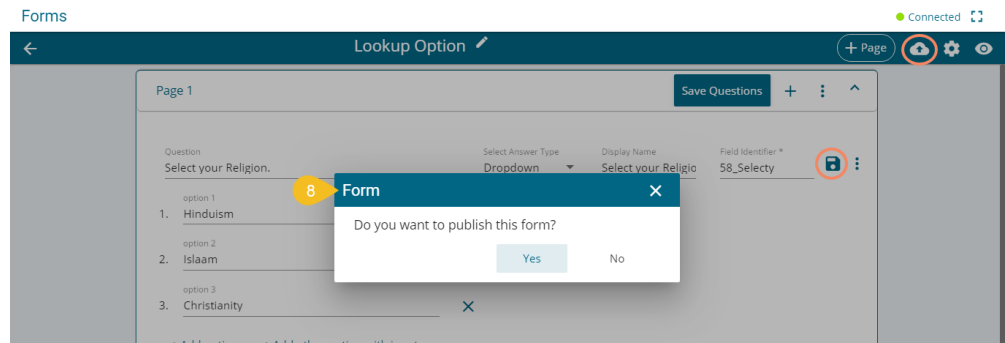
- i) Navigate to the Question page selecting a form.
- ii) Make sure you have at least two questions:
 - a. Question 1 with either of the choices given as answer type out of Radio Button/ Checkbox/ Dropdown/ Multi-select dropdown.
 - b. Question 2 with Textbox inserted as the answer type.



- 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.

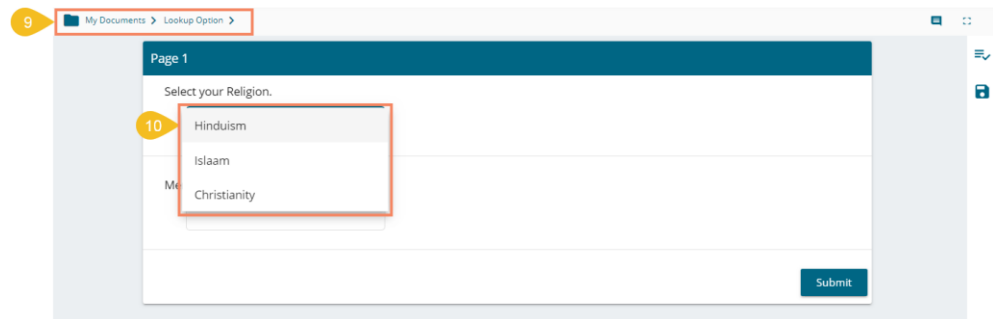


viii) Save the questions and publish the form.

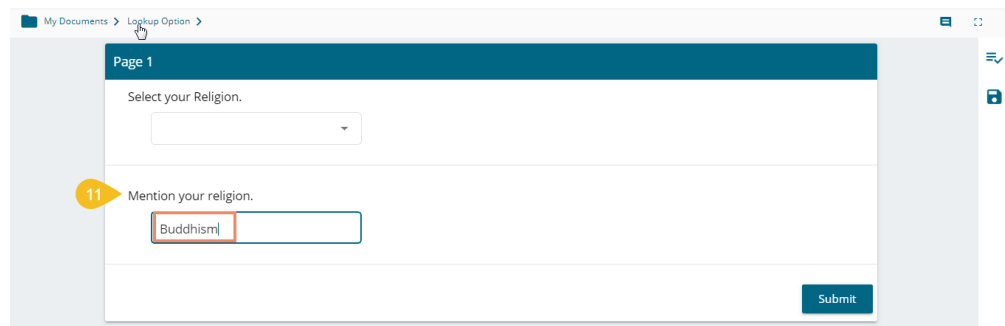


ix) Open the responses page for the published form.

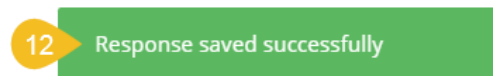
x) See the available options provided for Question no. 1



xi) Give response for the Question no. 2

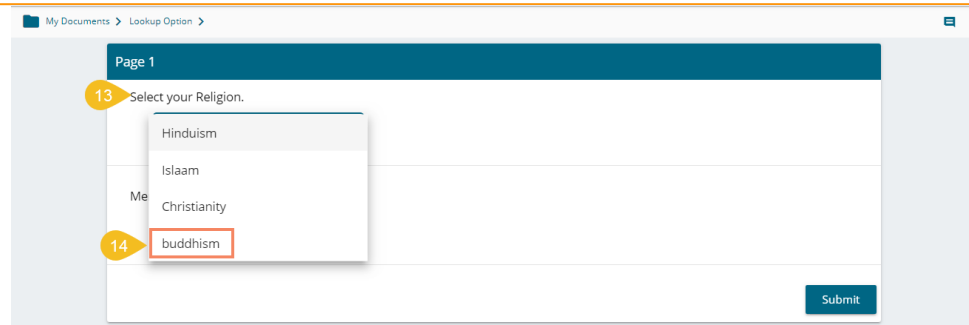


xii) Save the response.



xiii) Check the available options for Question no. 1.

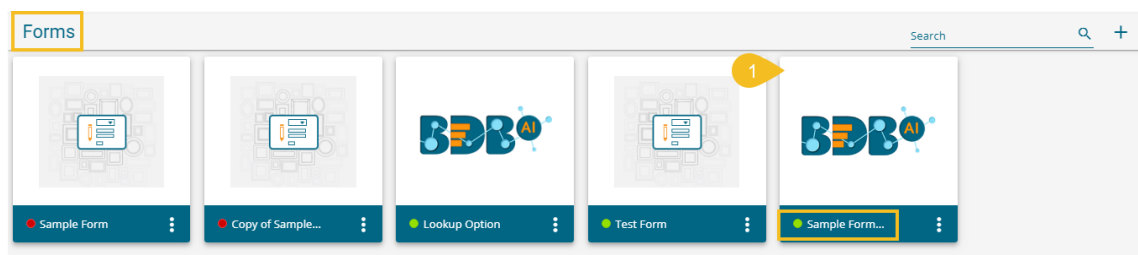
xiv) The response for Question no. 2 gets added in the lookup.



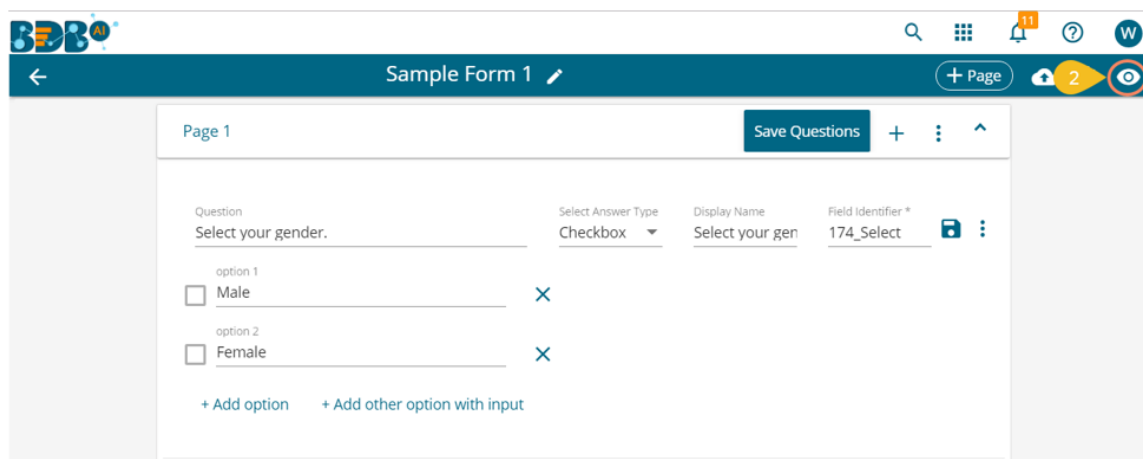
4.4. Form Preview

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.

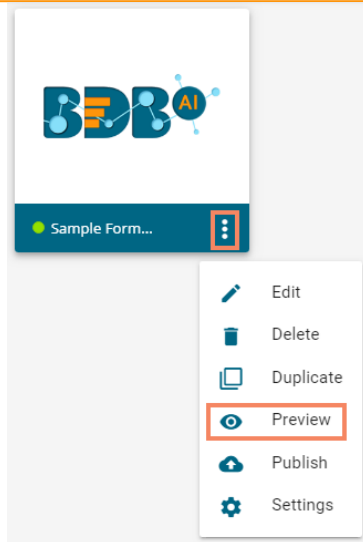


- ii) Click the 'Preview' icon from the header panel of the selected form.

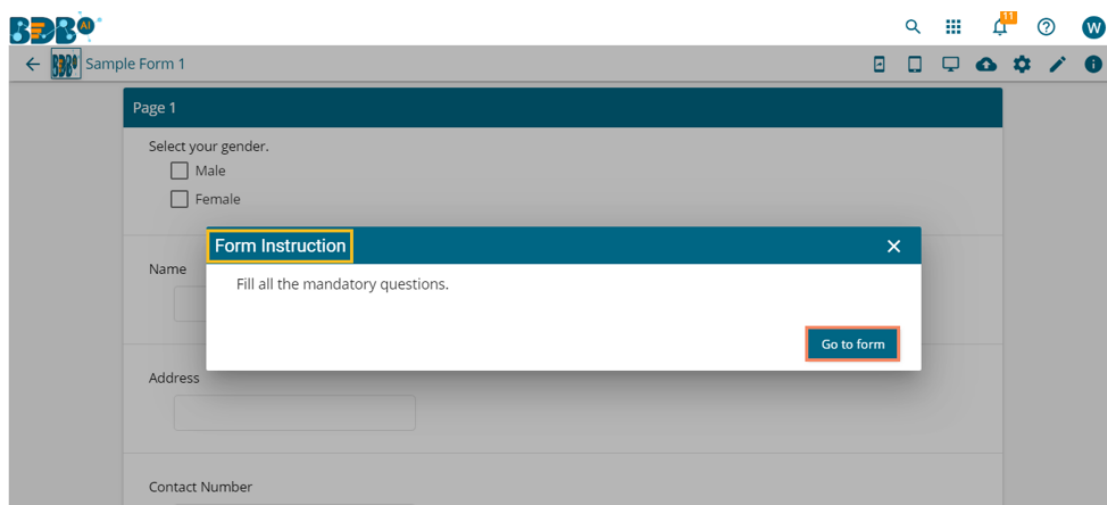


Or

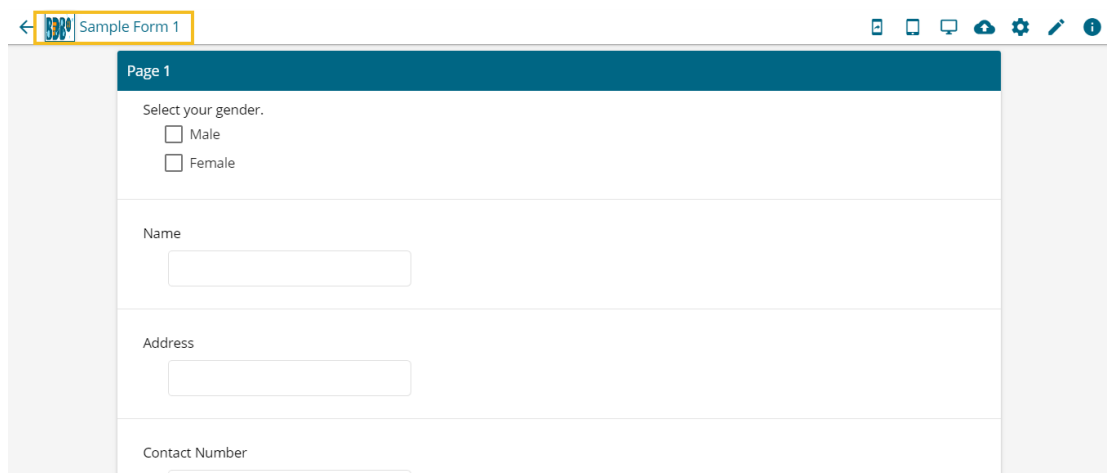
Select the 'Preview' option from the context menu that appears on the Form list.



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



- v) The Form content opens in the preview mode.

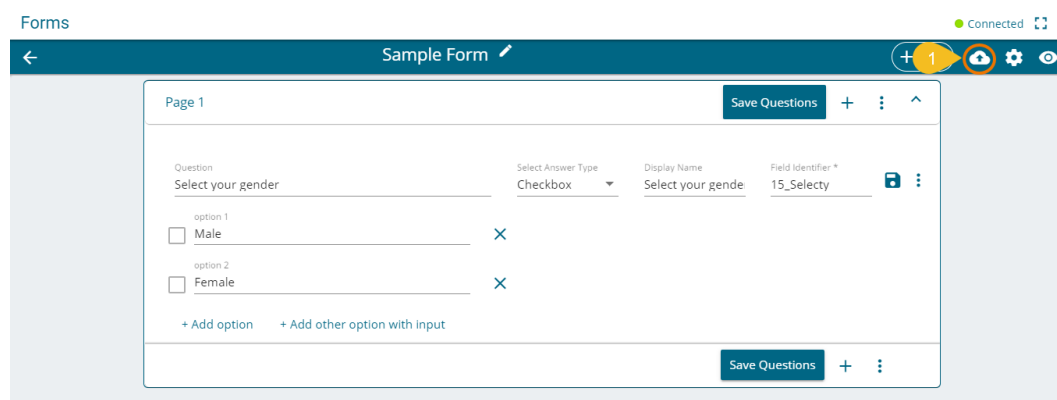


Icon	Icon Name	Action
	Mobile View	Opens form in the Mobile view
	Tablet View	Opens form in the Tablet view
	Large Screen View	Opens form in the Large Screen view
	Publish	Redirects to publish the form
	Settings	Redirects to the Form Settings page
	Form Edit	Redirects to edit the questions and pages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

4.5. Publishing a Form

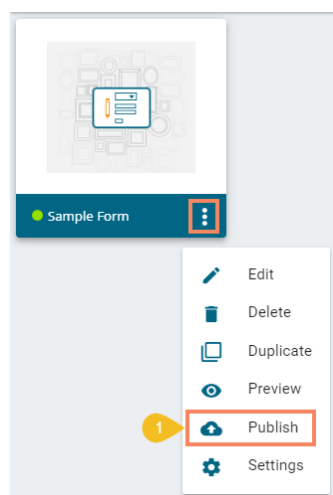
The users can publish the forms created by them to the BDB Platform. The published forms can be accessed on the BDB Platform homepage under the **'My Documents'** section.

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

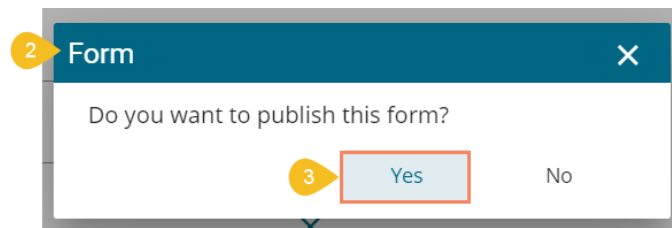


Or

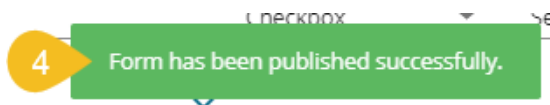
Click the Publish option using the Form Options menu.



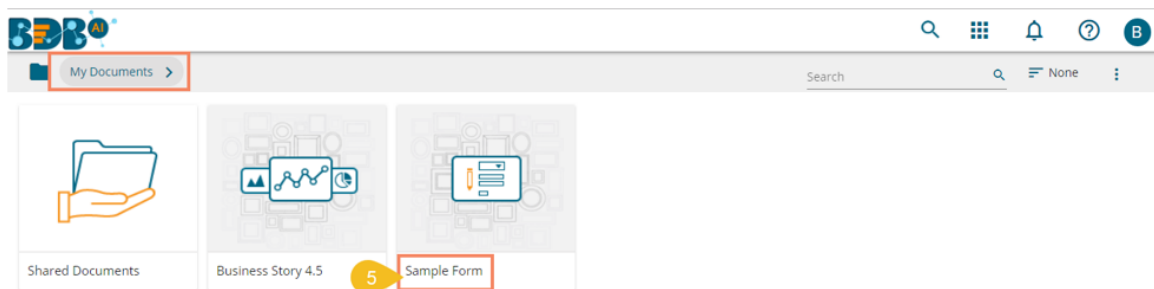
- ii) A pop-up window opens to confirm the action.
- iii) Click the 'Yes' option to publish the form.



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

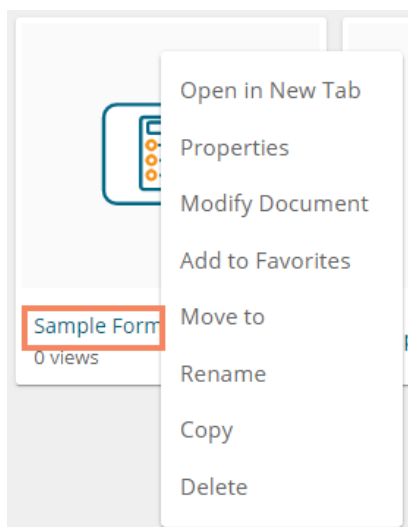


- v) The Published form appears under **My Documents** place of the same BDB Platform account.



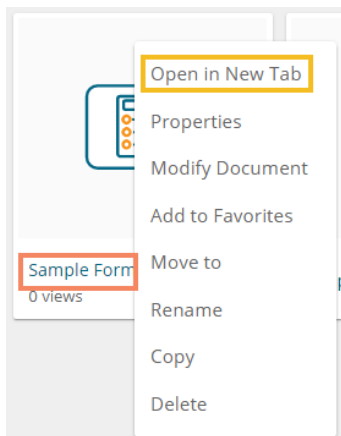
4.5.1. Context Menu Operation (only for Published Forms)

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.

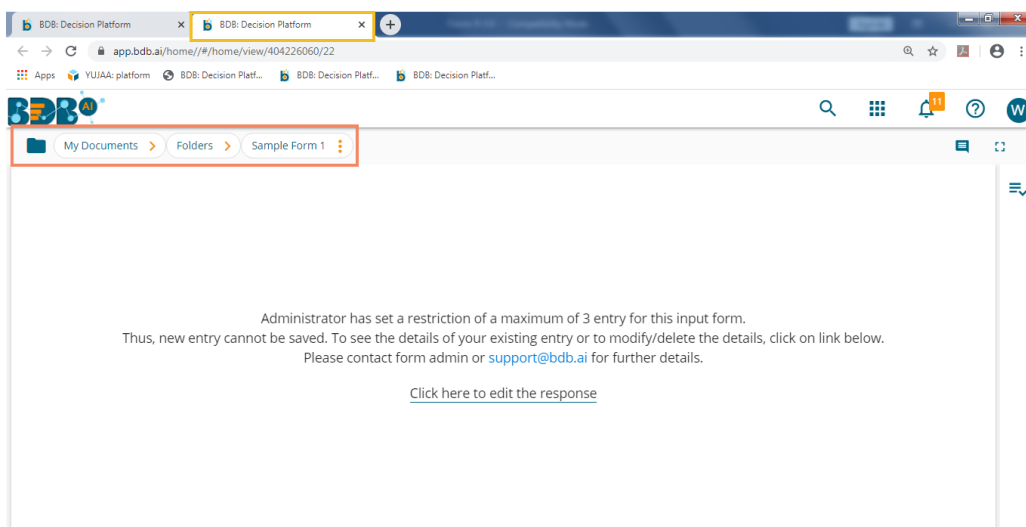


4.5.1.1. Open in New Tab

- i) Select the **'Open in New Tab'** option using the Context menu.

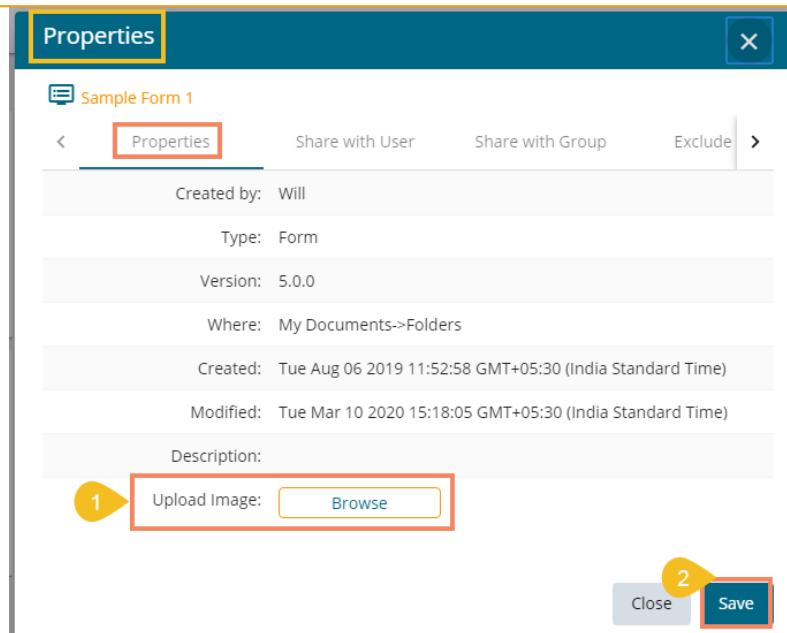


- ii) The form opens in the new tab.

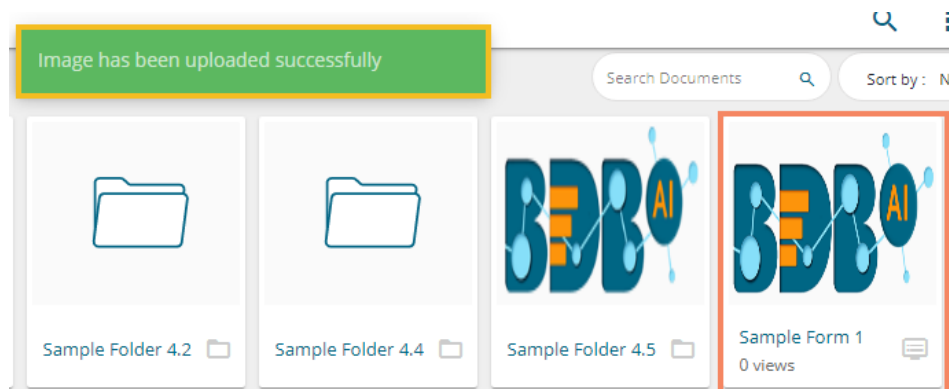


4.5.1.2. Properties

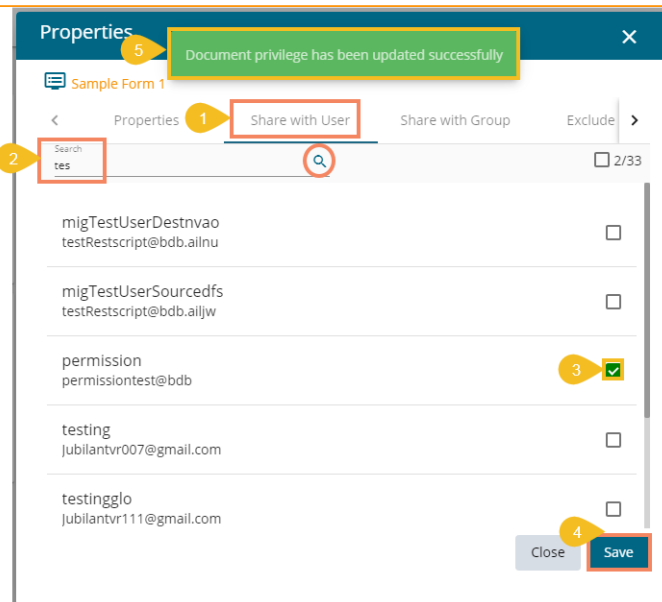
- i) Select the **'Properties'** option from the context menu.
- ii) The **'Properties'** window appears with four options:
 - a. **Properties:** Displays basic details about the Form creation.
 - i. Click the **'Browse'** option to upload an image.
 - ii. Click the **'Save'** option to save the update.



- iii. A message appears to assure about the update.
- iv. The image gets updated to the form.

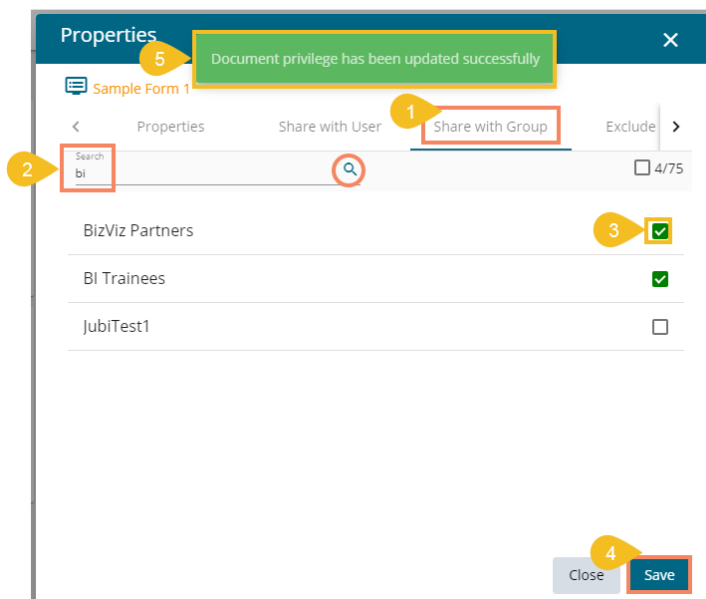


- b. Share with User:** The Form gets shared with the selected User
 - i. Select the **'Share with User'** option using the Properties window.
 - ii. Search for the specific user(s) using the Search bar.
 - iii. Select a user or multiple users by using a checkbox in the given box.
 - iv. Click the **'Save'** option.
 - v. A success message appears stating that the document privilege has been updated.



vi. The Form gets shared with the selected user(s).

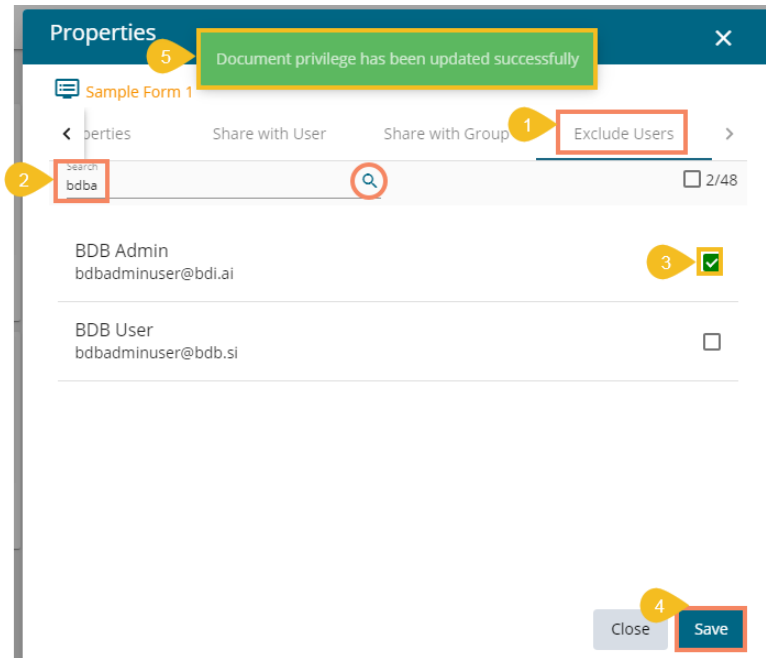
- c. **Share with Group:** The Form gets shared with the selected User Group
 - i. Select the **'Share with Group'** option using the Properties window.
 - ii. Search for the specific user group(s) using the Search bar.
 - iii. Select a user group or multiple user groups and move to the space given on the right side.
 - iv. Click the **'Save'** option.
 - v. A success message appears stating that the document privilege has been updated.



vi. 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. Search for the specific user(s) using the search bar.

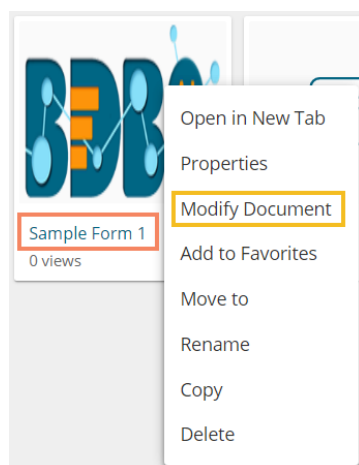
- iii. Select a user or multiple users and move to the space given on the right side. (Use the single arrow icon to move only one user. Use the double arrows icon to move all the users.)
- iv. Click the **'Save'** option.
- v. A success message appears, and the document privilege gets updated to exclude the selected users.



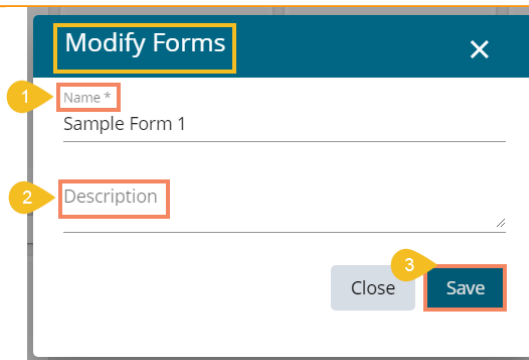
- vi. The Form permission gets excluded for the selected user/users.

4.5.1.3. Modifying a Form

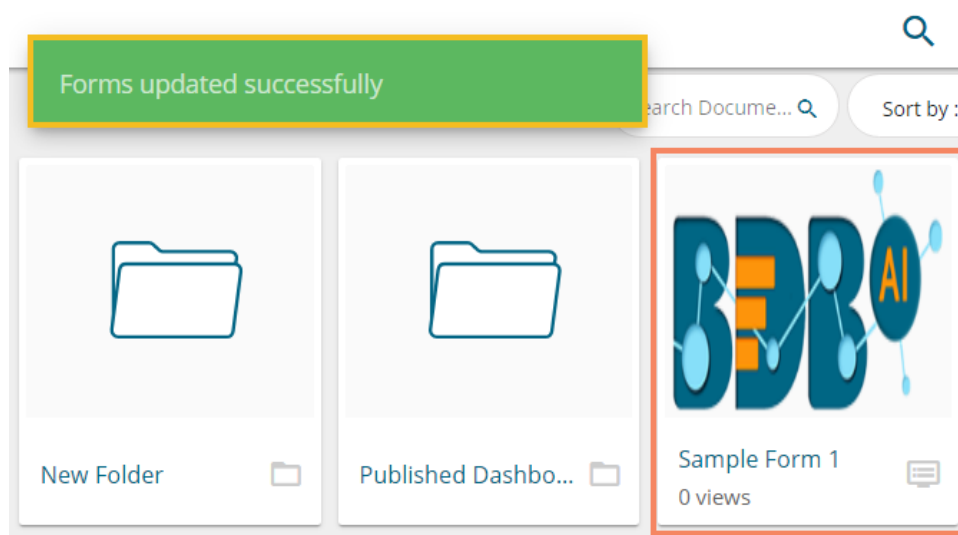
- i) Select the **'Modify Document'** option using the context menu.



- 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.

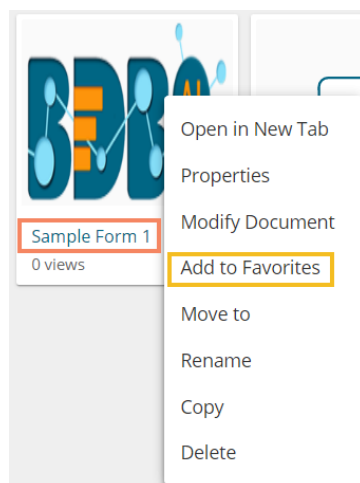


iv) The selected information gets modified, and a message appears to assure the same.

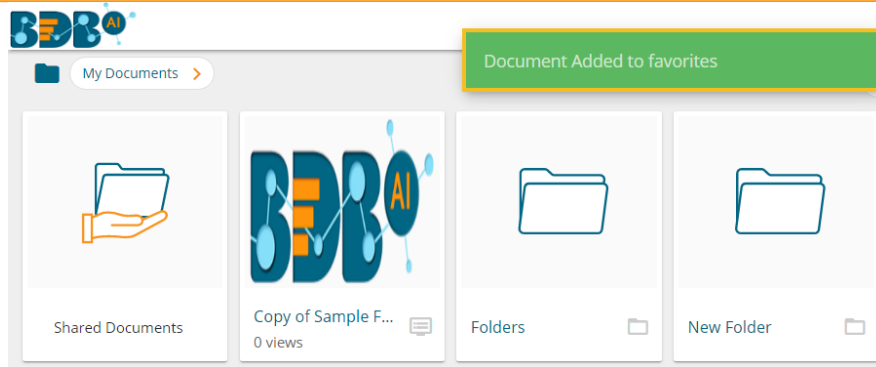


4.5.1.4. Adding a Form to Favorite

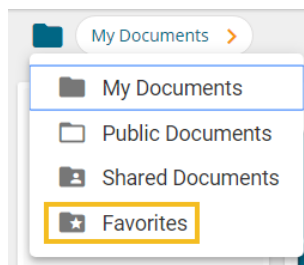
i) Select the 'Add to Favorite' option from the context menu.



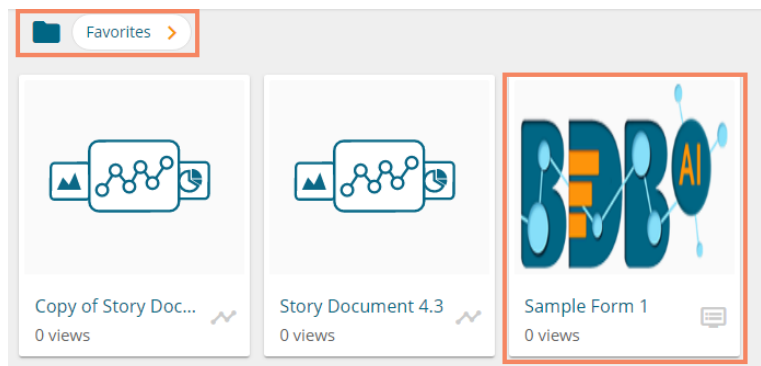
ii) A message appears to assure the success of the action.



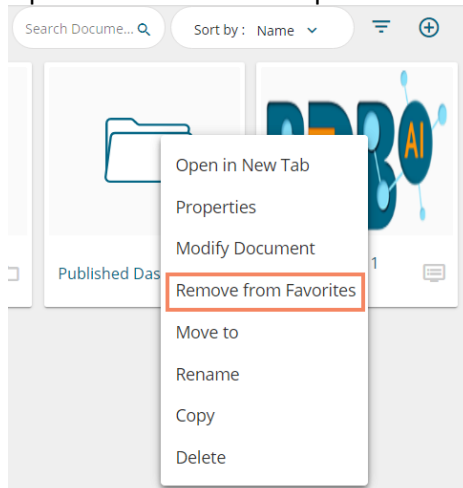
iii) Open the Favorites section.



iv) The selected Form gets added to the Favorites.



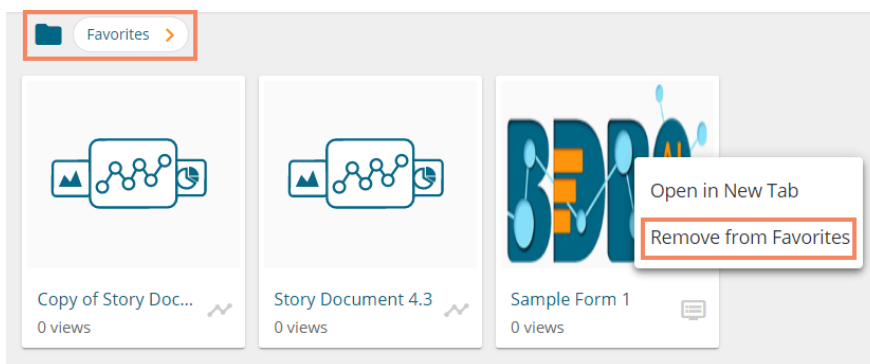
v) Open the context menu option for the same Form.



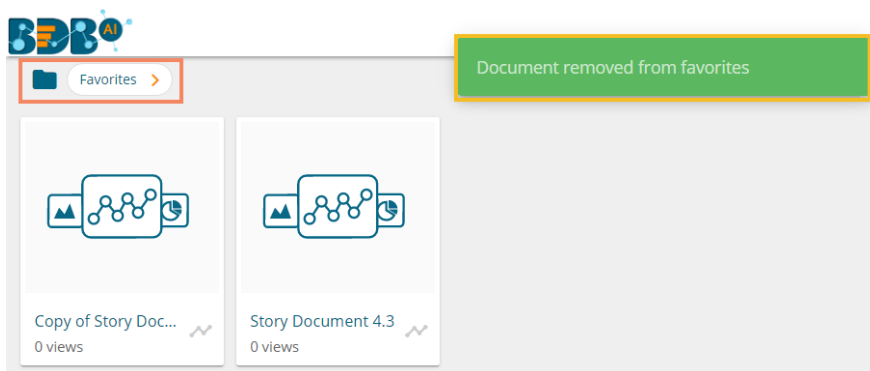
OR

Use the right-click on the Form which has been added to the Favorites.

- vi) The **'Remove from Favorite'** option appears.



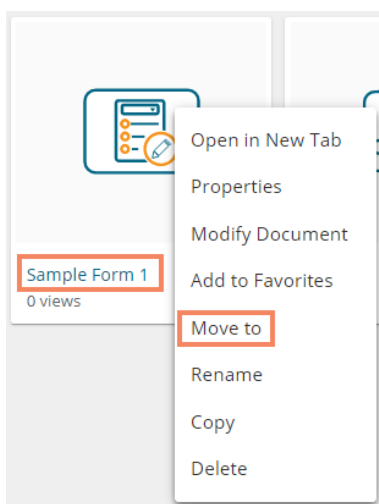
- vii) The Form gets removed from the Favorites, and a notification message appears stating the same.



4.5.1.5. Moving a Form

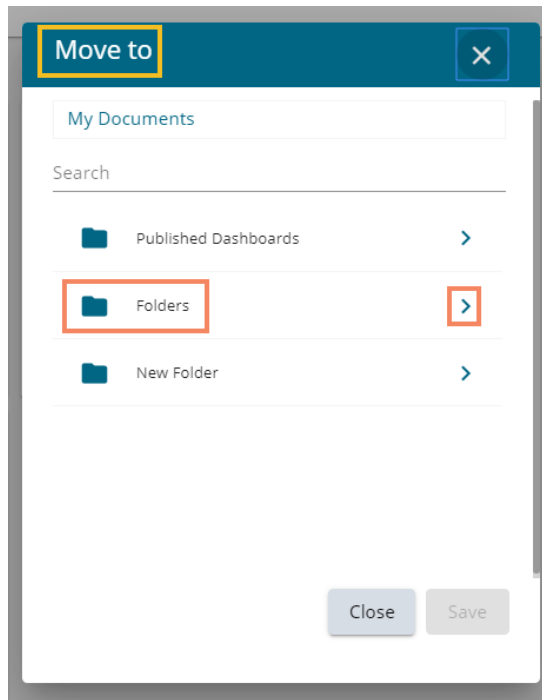
This option allows the user to move the Form from one folder or space to another folder.

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

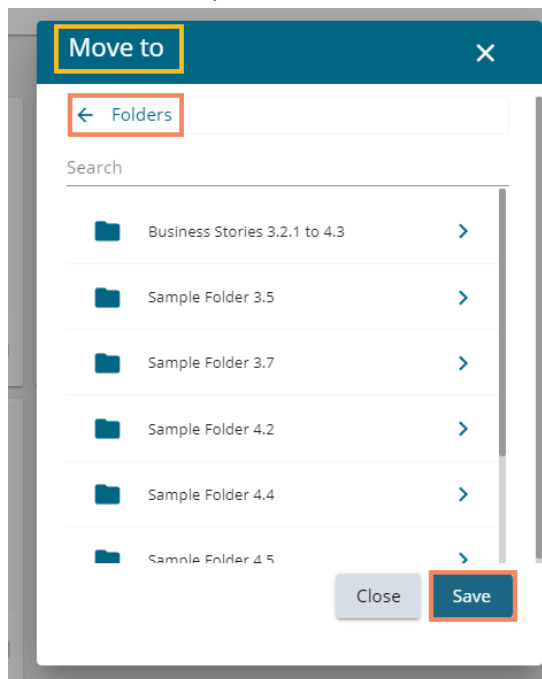


- iii) The **'Move To'** window appears displaying the available folders.

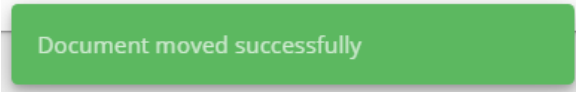
- iv) Select a folder.
- v) Click the **'Move'** > icon.



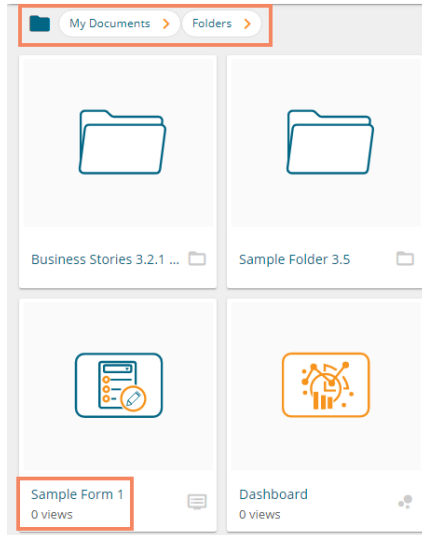
- vi) The users get redirected to the next screen displaying the selected folder name at the top.
- vii) Click the **'Save'** option.



- viii) A success message appears.



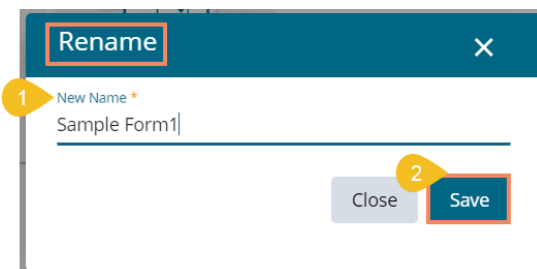
ix) The Form gets moved to the selected space.



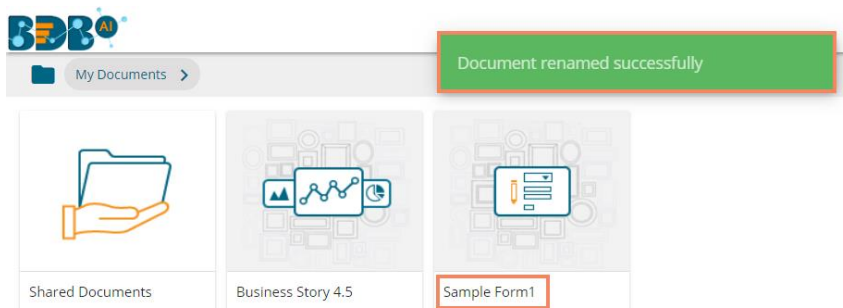
Note: To view a Form, use a click on the selected Form.

4.5.1.6. 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.

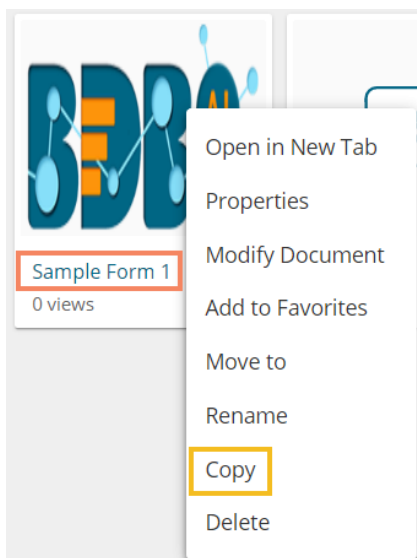


v) The selected form gets renamed.

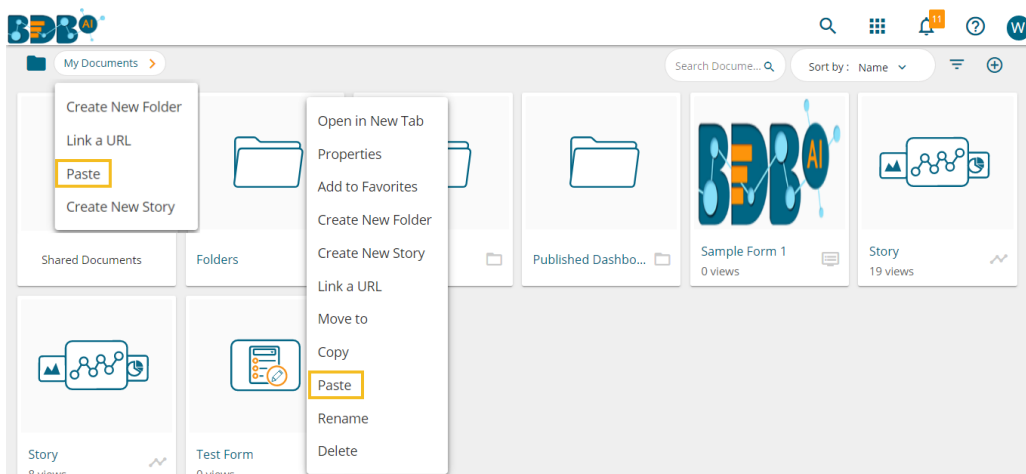


4.5.1.7. Copying a Form

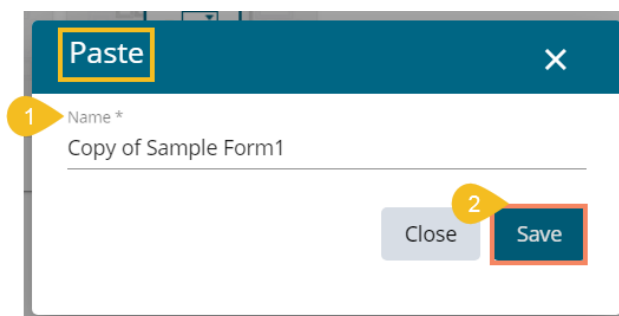
- i) Select the **'Copy'** option from the context menu.



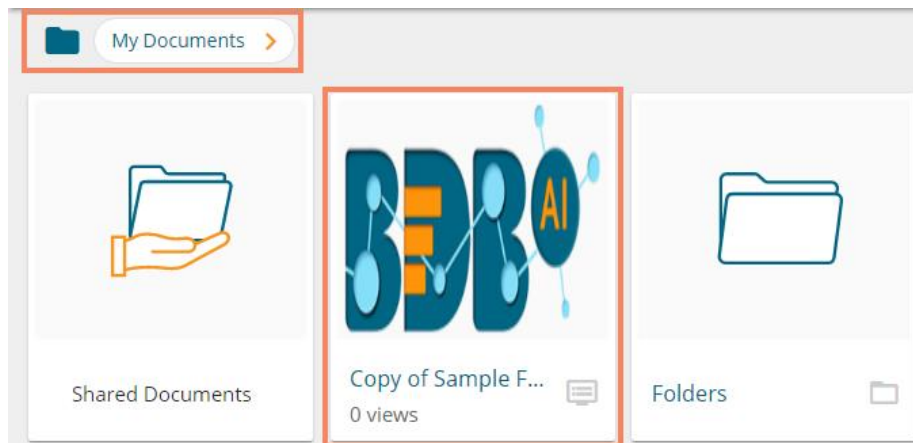
- ii) Use the right click on another folder or on the blank space to get the **'Paste'** option.
- iii) Click the **'Paste'** option.



- 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.

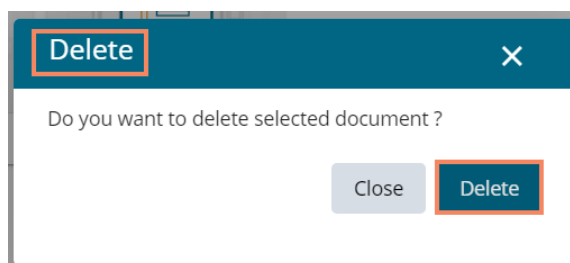


- vi) The form gets copied to the selected space with the new name.



4.5.1.8. 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.



- iv) The selected form gets deleted.

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 Documents > Sample Folder 4.5 > Sample Form 1

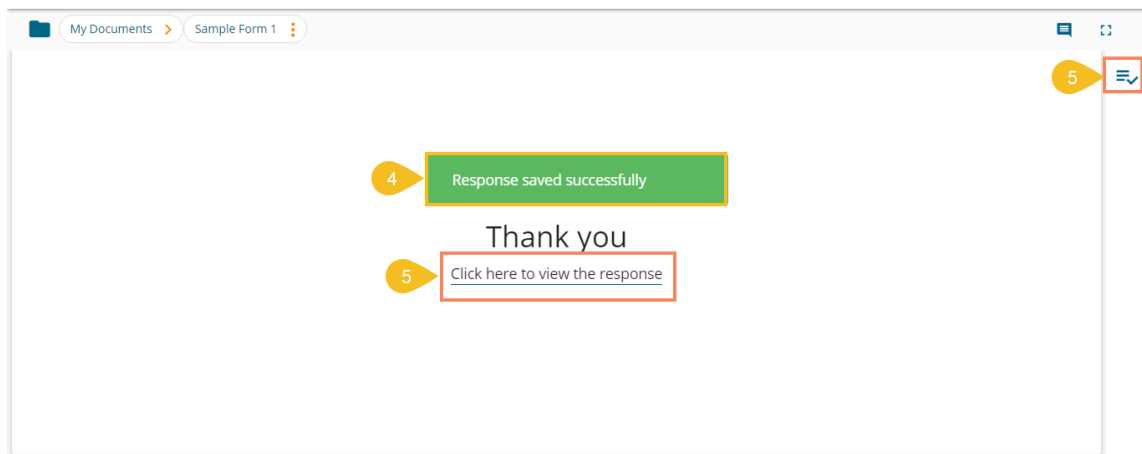
Address
BDBizviz Technologies, Bang

Contact Number
080234567

Email ID
bdbuser@bdb.ai

Submit

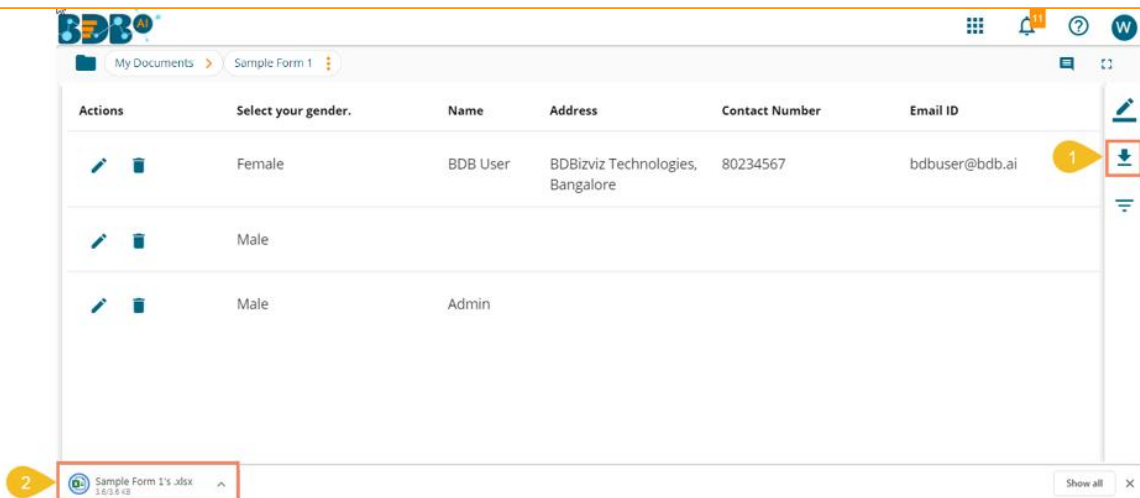
- iv) An acknowledge message appears to inform that the shared response has been saved. (The user can also use the 'Save' icon to save a response.)
- v) Click on the link 'Click here to view the response' or 'View Response' icon.



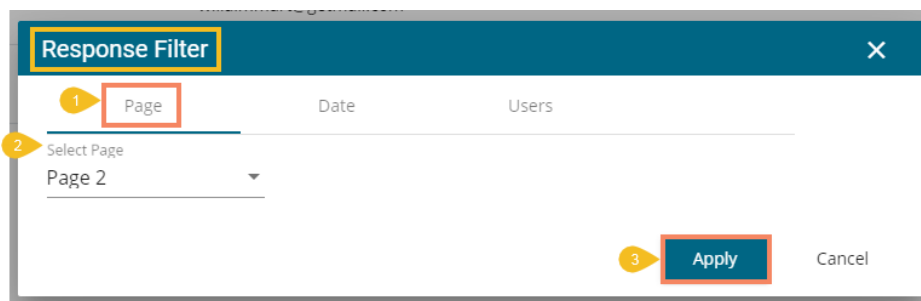
- vi) All the collected responses appear in the tabular format.
- vii) The admin can further **Edit** () or **Delete** () the collected responses by using the icons given under the 'Actions' column.

Actions	Name	Address	Contact Number	Email ID	Select your Nation
	BDB User	BDBizviz Technologies, Bangalore	80234567	bdbuser@bdb.ai	
	Admin				

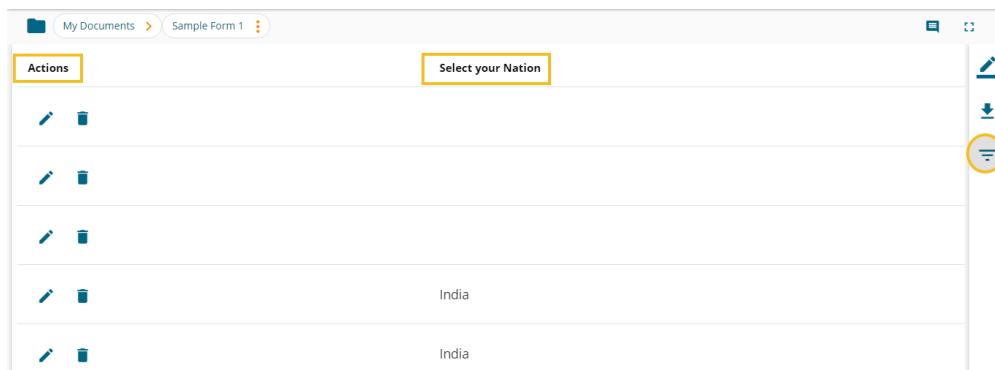
- viii) Click the 'Export in Excel' icon to download the responses in an excel file.



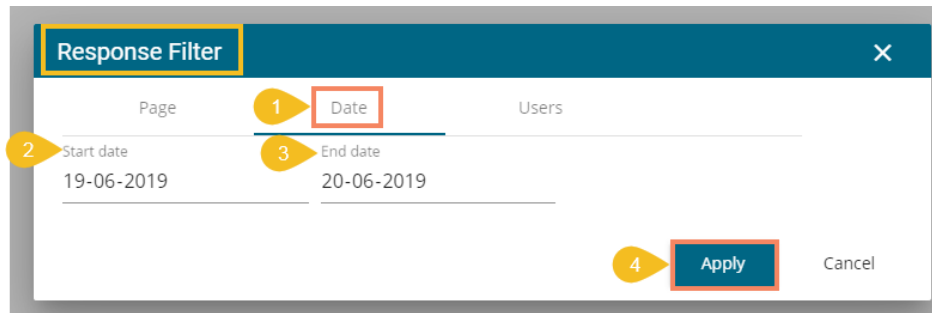
- ix) Click the **'Filter Response'** option to filter the responses. The user gets 3 options to filter the responses:
1. Page, 2. Date, and 3. Users
 - a. **Filtering Responses by Page**
 - i. Select the **'Page'** tab.
 - ii. Select a page using the drop-down menu.
 - iii. Click the **'Apply'** option.



- iv. The responses get filtered by the selected page.



- 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.

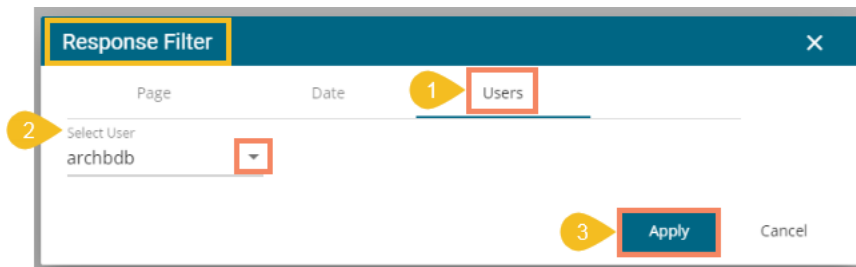


v. The responses get filtered by the selected dates.

Actions	Select your gender.	Name	City	Choose your country	Contact Number	Email ID
	Female					
	Male	William Martin	New York	USA	23232423343	willaimmart@gmail.com
	Female	Daisy Brown	San Francisco	USA	545084080	daisybrown34@gmail.com
	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.

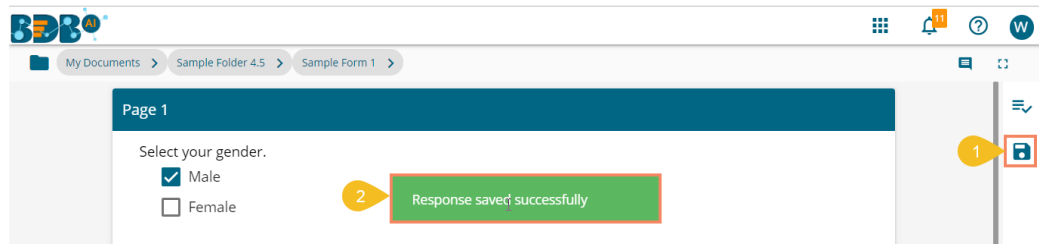


iv. The responses get filtered by the selected user.

Actions	What is your name?	Give your mail id?
	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'  icon to save the response.



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.

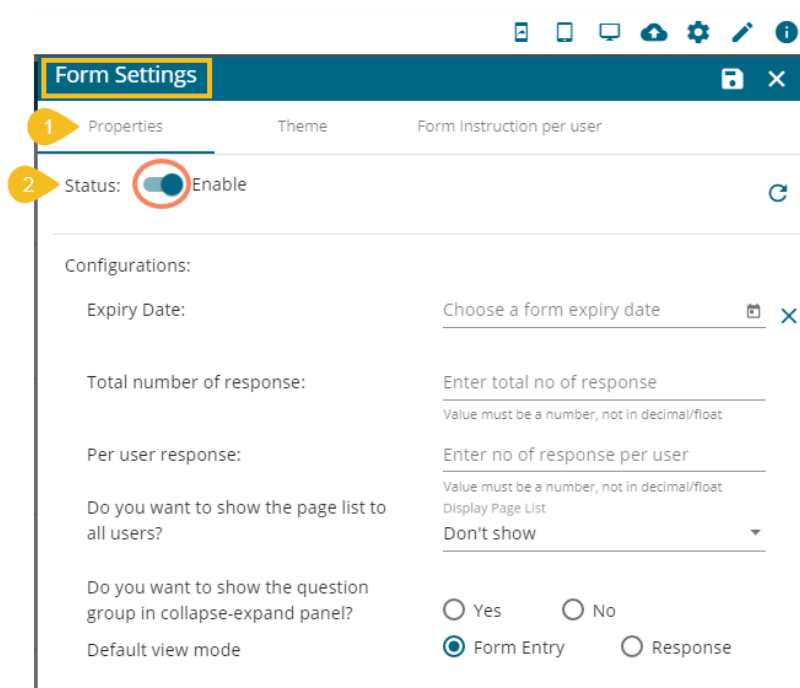
4.7.1. Properties

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.

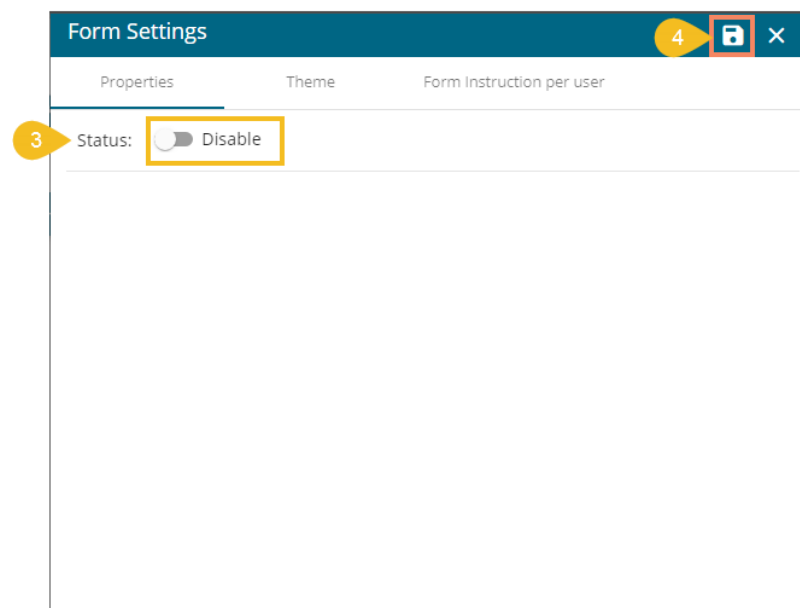
4.7.1.1. Status

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

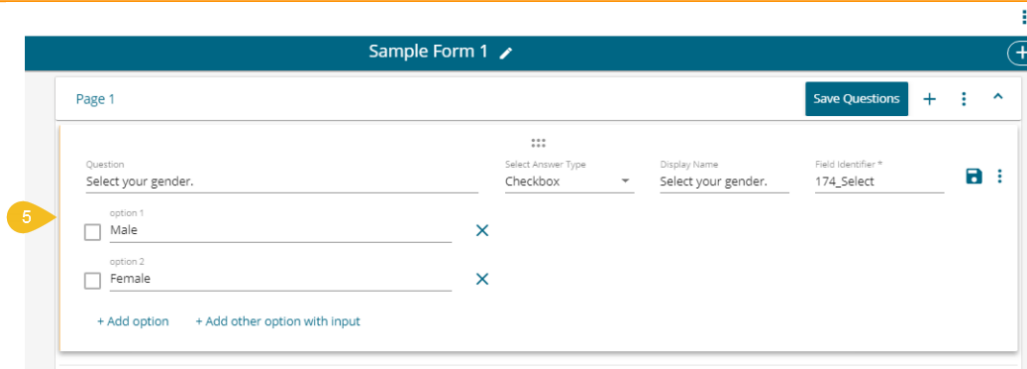
- i) Open the Properties Tab using the 'Form Settings' option. (It opens by default while selecting the 'Form Settings' option.)
- ii) The Enable/Disable radio button appears.



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



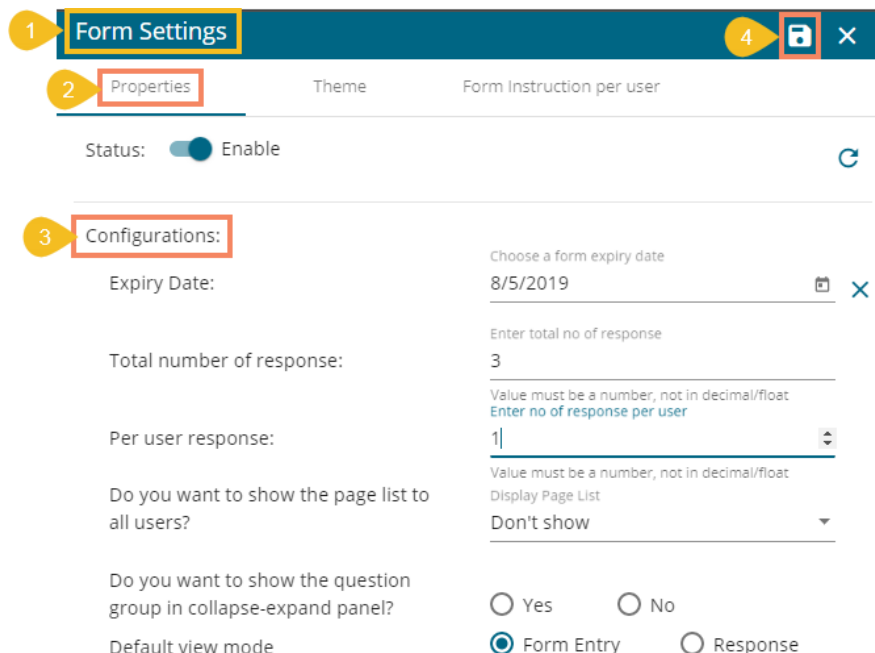
- iv) The Form content gets disabled, so the user can't give a response to any of the questions.




4.7.1.2. Configurations

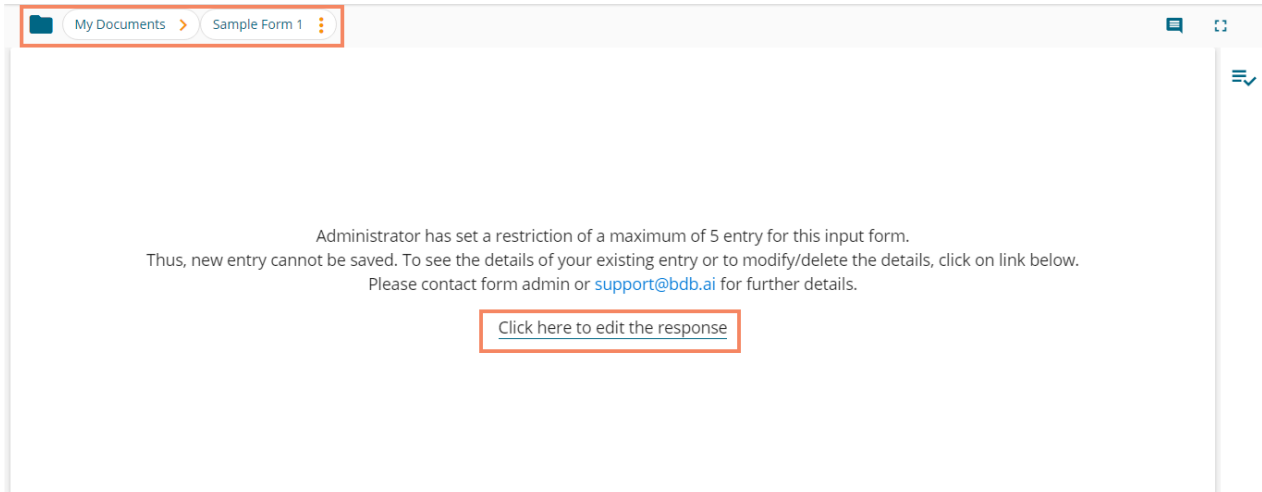
The users can configure the various Form properties using the Configuration field.


- i) Navigate to the Form Settings window.
- ii) Open the Properties tab. (It opens by default)
- iii) Access the '**Configurations**' fields mentioned under the Properties tab and 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.
- iv) Click the '**Save**' option to save the configurations.

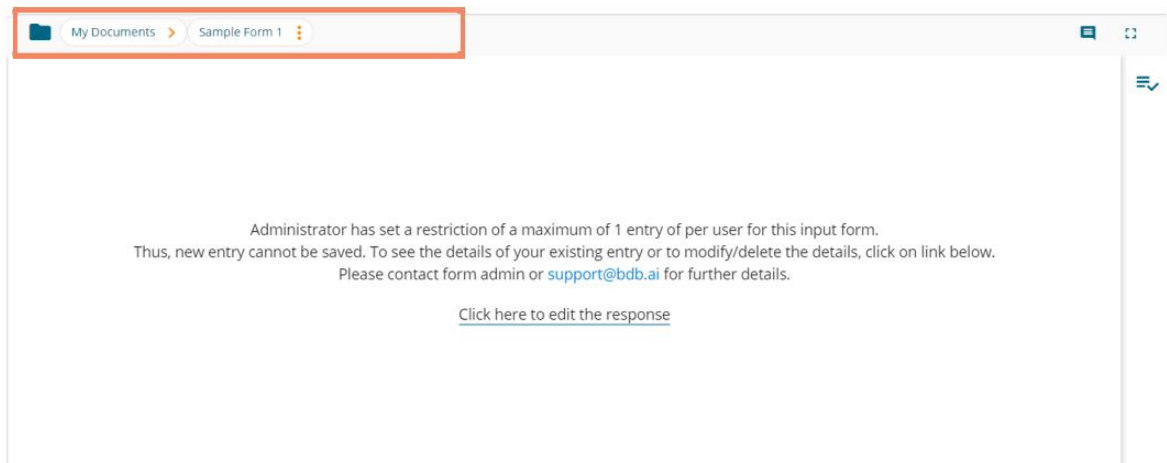


Note: The users get the following messages to notify various Form settings when the condition is fulfilled.

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.

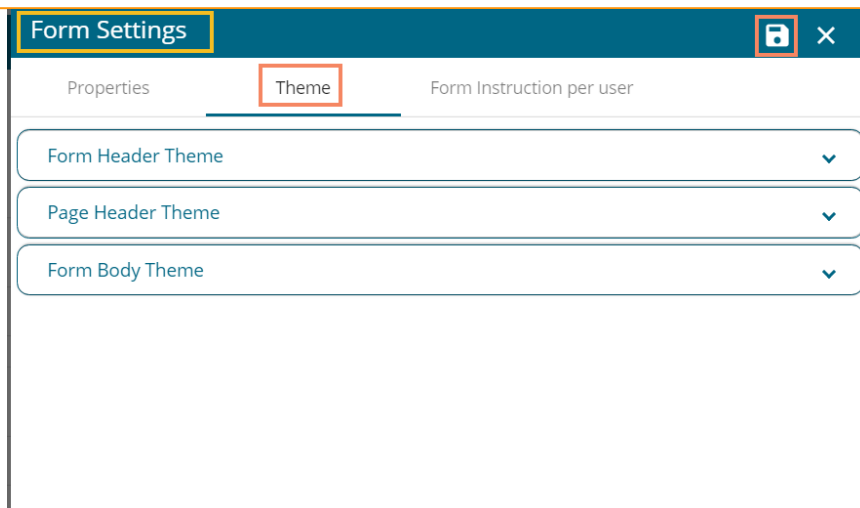


2. When Per user-set limit of the responses is reached.
 - a. The user can view the entered responses using the **'View Response'**  icon.
 - b. The user can edit the response by clicking the **'Click here to edit the response'** option.
 - c. The user needs to contact the support team/ admin to get further details on the same.



4.7.2. Theme

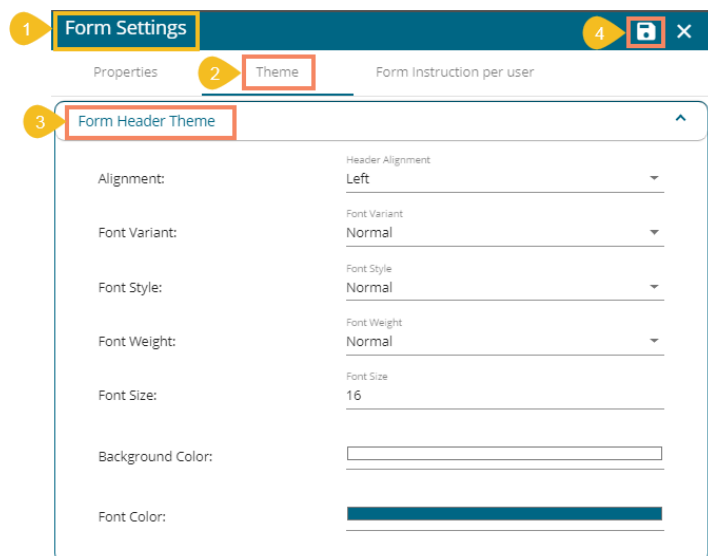
The users can set the **'Theme'** tab to set themes for the Form Header, Page Header, and Form Body.



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

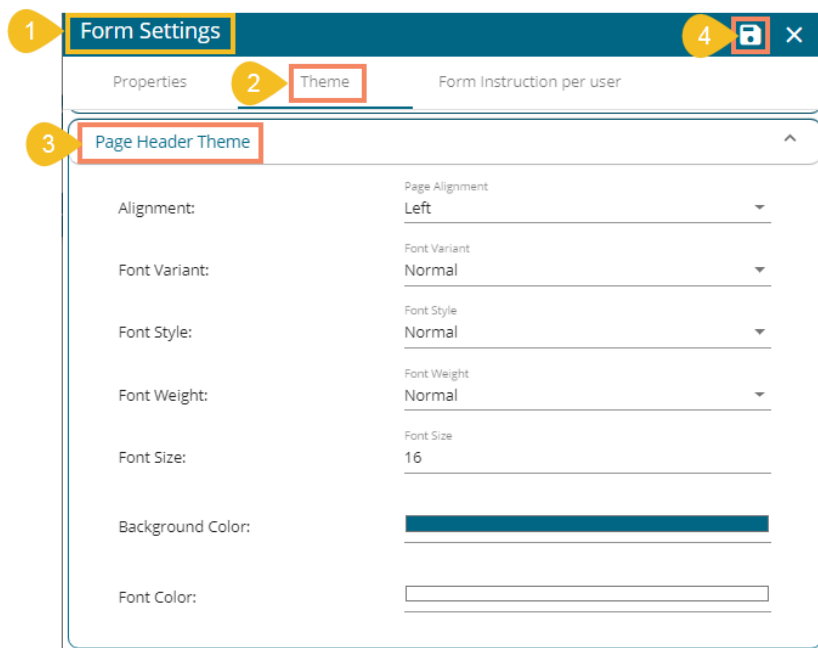
4. Form Header Theme

- a. Navigate to the Form Settings window.
- b. Open the 'Theme' tab.
- c. Configure the following options for the Form Header Theme:
 1. Alignment: Set header alignment out of the options provided in the drop-down menu **(Left/Center)**
 2. Font Variant: Choose a variant type out of the options provided in the drop-down menu **(Normal/Small Caps)**
 3. Font Style: Set Font style out of the options provided in the drop-down menu **(Normal/Italic)**
 4. Font Weight: Select a Font weight option out of the given choices in the drop-down menu **(Normal/Bold)**
 5. Font Size: Set the font size by entering a number
 6. Background Color: Choose a color to be applied for the Form Header background using the color menu
 7. Font Color: Choose a font color using the color menu
- d. Click the 'Save' option to save settings for the Form Header.



5. Page Header Theme

- a. Navigate to the Form Settings window.
- b. Open the **'Theme'** tab.
- c. Configure the following options for the Form Header Theme:
 1. Alignment: Set the page header alignment out of the options provided in the drop-down menu (**Left/Center/Right**)
 2. Font Variant: Choose a variant type out of the options provided in the drop-down menu (**Normal/Small Caps**)
 3. Font Style: Set Font style out of the options provided in the drop-down menu (**Normal/Italic**)
 4. Font Weight: Select a Font weight option out of the given choices in the drop-down menu (**Normal/Bold**)
 5. Font Size: Set the font size by entering a number
 6. Background Color: Choose a color to be applied for the Page Header background using the color menu
 7. Font Color: Choose a font color using the color menu
- d. Click the **'Save'** option to save settings for the Form Header



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.

1 Form Settings 5 Save X

Properties 2 Theme Form Instruction per user

3 Form Body Theme

4 Question Theme Properties:

Font Variant:	Normal
Font Style:	Normal
Font Weight:	Normal
Font Size:	15
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

1 Form Settings 5 Save X

Properties 2 Theme Form Instruction per user

3 Form Body Theme

4 Answer Option Theme Properties:

Font Variant:	Normal
Font Style:	Normal
Font Weight:	Normal
Font Size:	15

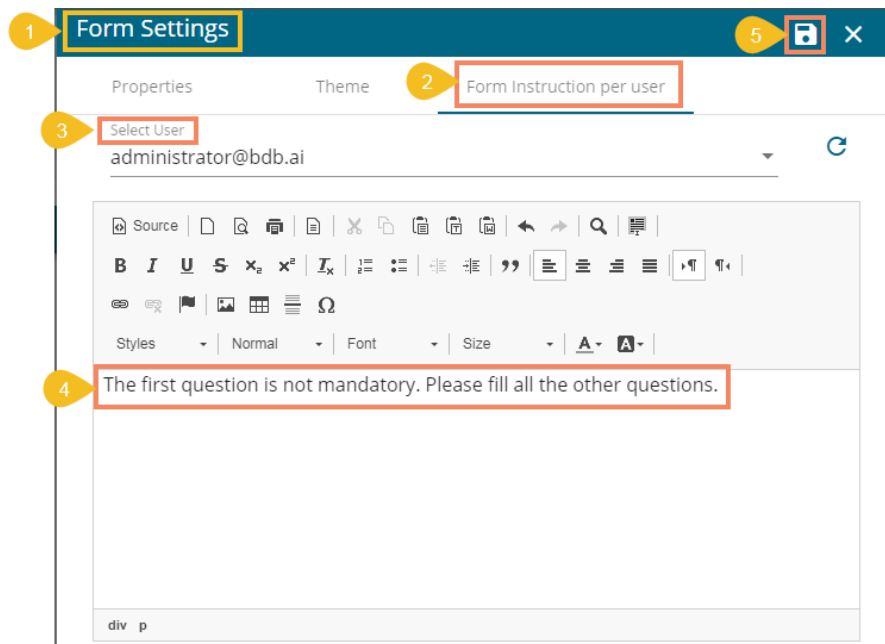
Note: There is a single 'Save' option provided for all the 3 Form Settings tab. The user needs to click the 'Save' option to save the changes, even though they are related to a single settings tab.

4.7.3. Form Instruction per user

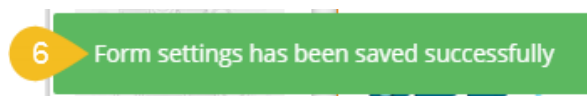
The user can insert Form Instruction for a specified user. The instruction gets displayed only for the selected user while opening the preview screen.

- i) Navigate to the 'Form Settings' page.
- ii) Click the 'Form Instruction per user' option.
- iii) Select a user using the drop-down menu.

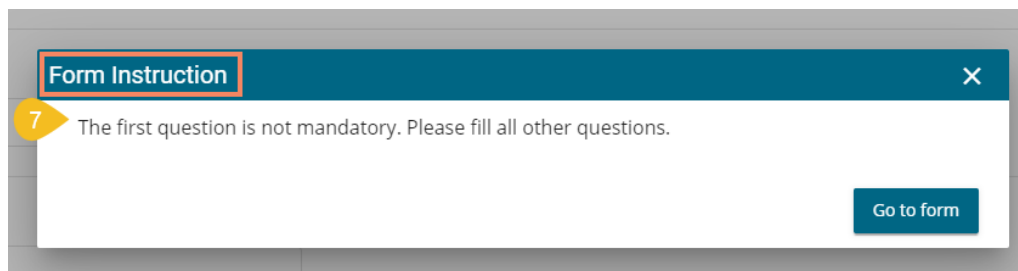
- iv) Insert a specific instruction in the given space.
- v) Click the 'Save' option.



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




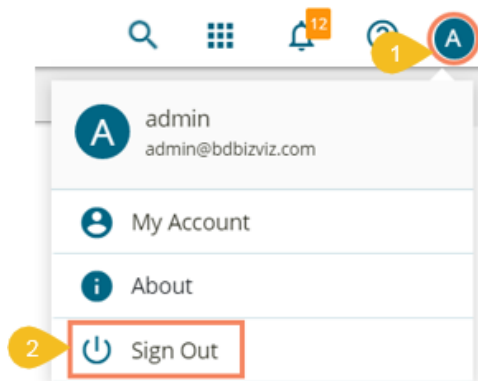
- vii) Access the Form preview page from the User account for which the instruction is inserted. The specified instruction appears.



5. Signing Out

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

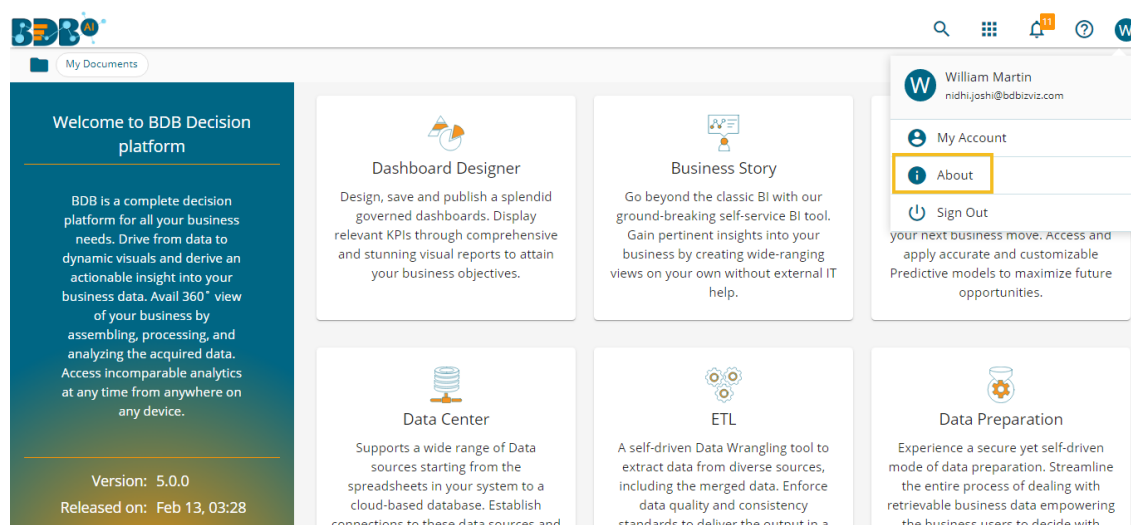
- i) Click the 'User Profile' icon  on the Platform homepage.
- ii) Click the 'Sign Out' option.



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

Note:

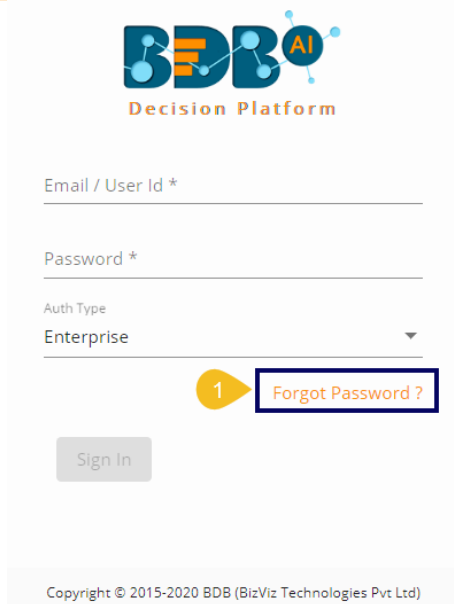
- a. By clicking the ‘**Sign Out**’ option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the ‘**About**’ option to open the default welcome page of the BDB Platform.



5.1. Forgot Password Option

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

- ii) Click the ‘**Forgot Password?**’ option from the Sign In page.



Decision Platform

Email / User Id *

Password *

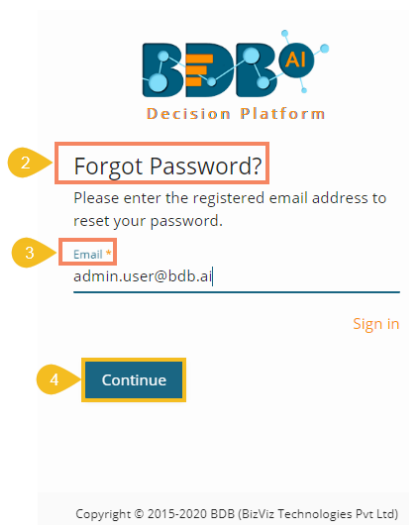
Auth Type
Enterprise

1 Forgot Password ?

Sign In

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- iii) The **'Forgot Password?'** page opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click the **'Continue'** option.



Decision Platform

2 Forgot Password?

Please enter the registered email address to reset your password.

3 Email *

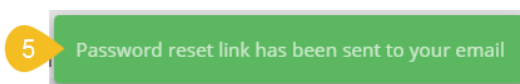
admin.user@bdb.ai

Sign in

4 Continue

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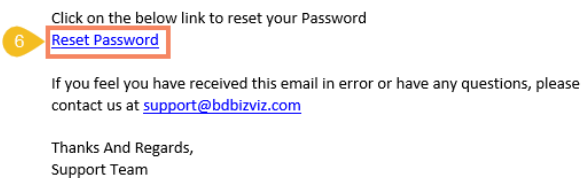
- vi) The user may be redirected to select a space in case of multiple spaces under one server link(The user needs to select a space and click the **'Continue'** option once again). If a user does not have multiple spaces then, a message appears to notify the user that the password reset link (The users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



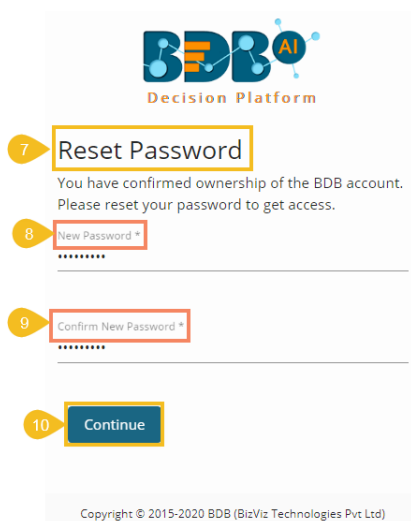
5 Password reset link has been sent to your email

- vii) Click the link from your registered email.

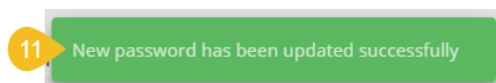
This email is sent in response to your request for a password reset.



- viii) The user gets 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.



- xii) The password for the selected BDB account gets reset and a message appears to inform the user.



Note: The user gets redirected back to the Sign In page after successfully resetting the password.

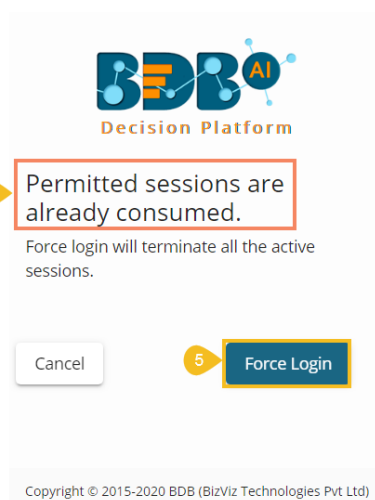
5.2. Force Login

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 the 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 '**Sign In**' option.



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



- vi) A warning message appears the currently active sessions get killed, and the user gets redirected to the BDB Platform Sign In page.
- vii) The user needs to provide valid credentials once again and click the '**Continue**' option to access the platform.