Formera Data Management

USER GUIDE

Contents

1. Forms

1.1. Form Builder

Click on the Forms tab on the left side of the platform's homepage.

In this window, you see:

- A table of the previously created forms **number 1**.
- A filter creation button **number 2**.
- A form creation button **number 3**.
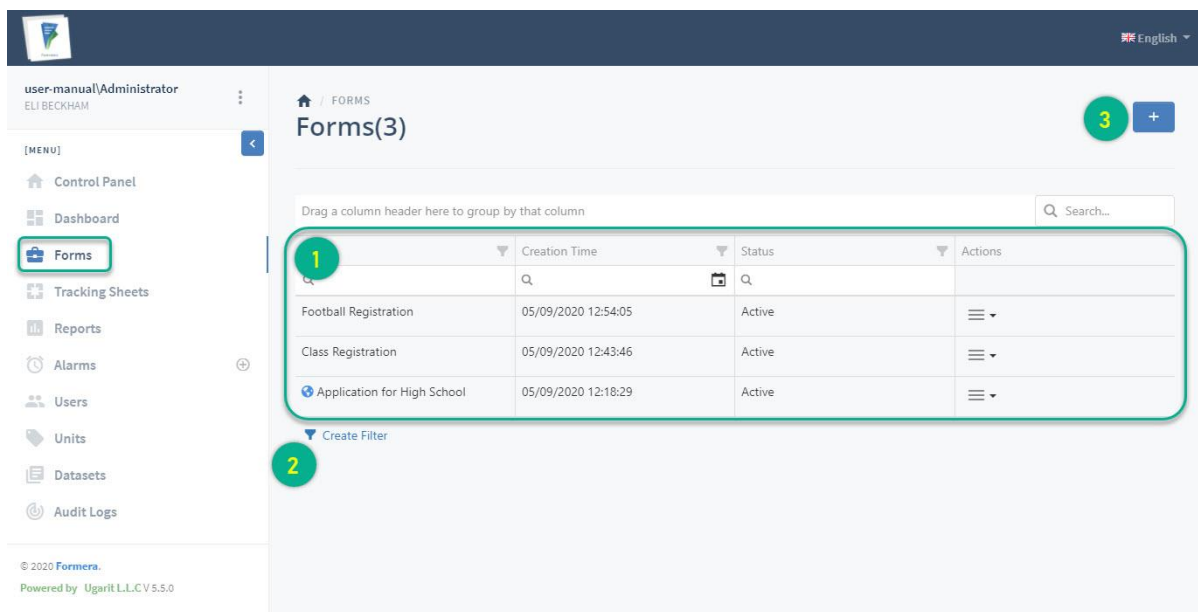
To create a new form, click on the + sign button **number 3** at the upper right corner of the window.

A new pop-up window will appear, here you can add, edit, delete the form's fields, and adjust the settings of the form. A complete list of the fields' types appears on the right side of the page.

Steps to create a new form:

1. Type the form name in the box **number 1**.

2. To add a field to the form layout:

- Click on the field's name in the list of the fields' types on the right side of the page **number 2**, then the field will be added immediately to the layout.
  Or
- Simply, drag the field from the list of the fields and drop it into the layout of the form, you can also use the same technique **drag and drop** to arrange the order of the fields in which they appear in the form.
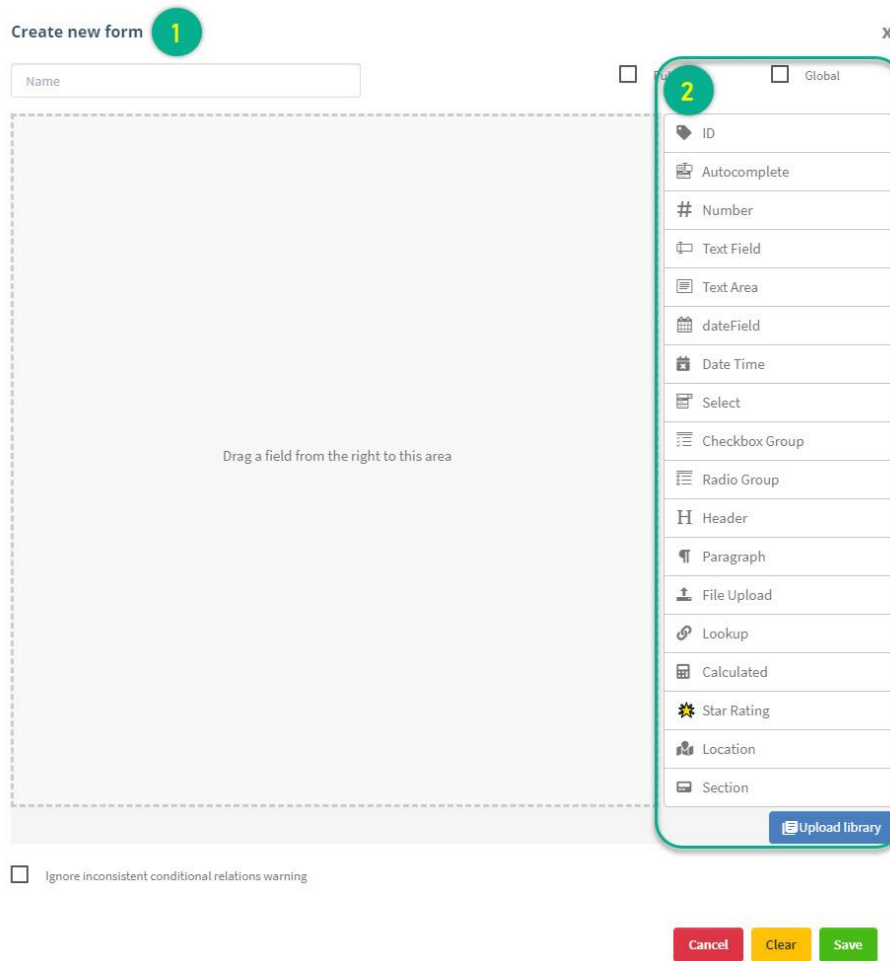
3. On the upper right side of any object block that you choose, there are three options, you can edit the object, copy it, or delete it, **number 3**.
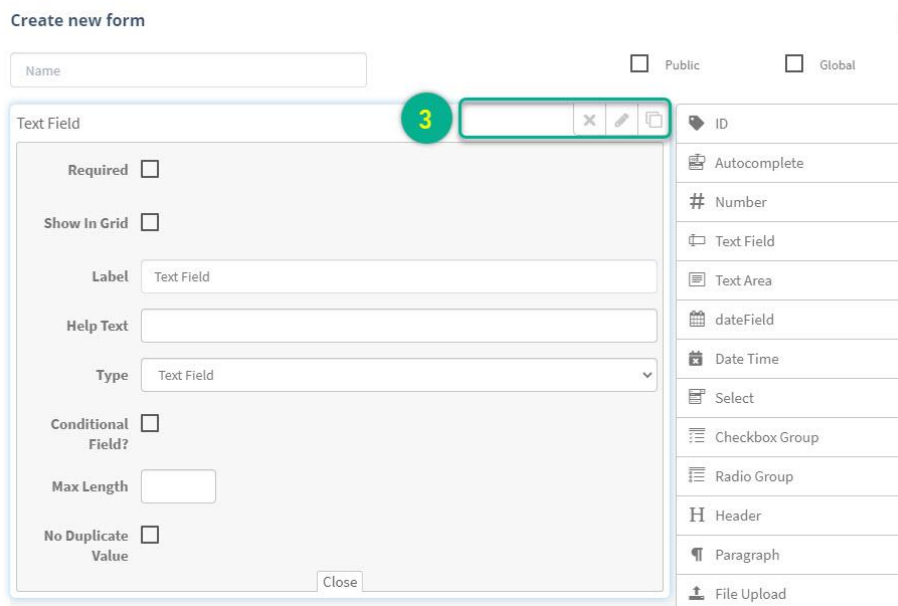
1.2. Data Field's Types

1.2.1. Identification Number ID

The ID field is used to add a unique information field to the submission. If you add the ID to the form layout, the submission process will assign automatically an auto-increment value to each new submit.

This unique Identification information is so crucial when you want to create a connection between the different forms, you can consider it as a primary key and connect it with a foreign key in another form.

1. **Show in Grid**
   Check this box if you want the ID to appear in the list of the submissions.
2. **Label**
   Give the field a suitable title that will appear in the form layout.
3. **Prefix**
   Choose the prefix of this auto-incremented field.
4. **Digit Count**
   Determine the number of digits that will be after the prefix.

Example

Label: Student ID
Prefix: SID
Number of digits: 3
The field's values will be:
SID001, SID002, SID003, … etc.

1.2.2. Text Field

This field is used to add specific places in the form's layout to be filled with text information, with several types such as Text, URL, and Email.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.

If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**
Check this box if you want the Text field to appear in the list of the submissions.

3. **Label**
Give the field a suitable title that will appear in the form layout.
4. **Help Text**
Add additional information to give a hint about the content that should be written in the field.
5. **Type**
Choose the type among:
   - Text
   - URL
   - Email

And this will add validation constraints on the data filled in the field, so the submission process will accept only the data that meets exactly the determined format or type.
6. **Conditional Field**
Check this box if you want the current Text field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)

- Select Value (to determine which value you want the current field to show up according to).

7. **Max Length**
   To determine the maximum number of digits allowed into this field.
8. **No Duplicated Value**
   Check this box if the information allowed into this field is unique and has not been submitted previously.

1.2.3. Text Area

The Text Area field allows you to collect multiple text lines and paragraphs. If you would like to give the users an option to add more information to their submissions, this field will be so useful.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.

By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**

   Check this box if you want the Text Area field to appear in the list of the submissions.

3. **Label**

   Give the field a suitable title that will appear in the form layout.

4. **Help Text**

   Add additional information to give a hint about the content that should be written in the field.

5. **Conditional Field**

   Check this box if you want the current Text Area field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

Hint

You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

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6. **Max Length**

   To determine the maximum number of digits allowed into this field.

1.2.4. Number

This field is used to collect numerical information.

1. **Required**

   Check this box if you want to ensure that the user fills in this field before the submission.

   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.

   By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**

   Check this box if you want the Number field to appear in the list of the submissions.

3. **Label**

   Give the field a suitable title that will appear in the form layout.

4. **Help Text**

   Add additional information to give a hint about the content that should be written in the field.

5. **Conditional Field**

   Check this box if you want the current Number field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)

- Select Value (to determine which value you want the current field to show up according to).

Hint
You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

6. **Type**
   Choose the type among:
   - Number
   - Percentage
   - Decimal

   And this will add validation constraints on the data filled in the field, so the submission process will accept only the data that meets exactly the determined format or type.

7. **Validation Type**
   Determine the most suitable validation conditions that meet exactly the constraints of the acceptance process for the submissions.
   You can choose among those conditions: **<, >, <=, >=, between**.

1.2.5. Date Field

This field is used to collect date information from the users.

The user can fill in the date information via two methods:

- Enter the date directly in the proper date format: day, month, year.

- Pick the date from an interactive calendar.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Date field to appear in the list of the submissions.
3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be written in the field.
5. **Conditional Field**
   Check this box if you want the current Date field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

Hint

You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

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6. **Validation Type**

Determine the most suitable validation conditions that meet exactly the constraints of the acceptance process for the submissions.

You can choose among those conditions: **<, >, <=, >=, between**.

1.2.6. Date Time

This field is used to collect date & time information from the users.

The user can fill in the date & time information via two methods:

- Enter the date & time directly in the proper format: day, month, year, hour, minute.
- Pick the date & time from an interactive calendar and clock.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Date Time field to appear in the list of the submissions.
3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be written in the field.
5. **Conditional Field**
   Check this box if you want the current Date Time field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

After you check the box, two fields will show up:
- Select Restricting Field (to choose the selected field name)
- Select Value (to determine which value you want the current field to show up according to).

Hint

You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

6. **Validation Type**
   Determine the most suitable validation conditions that meet exactly the constraints of the acceptance process for the submissions.
   You can choose among those conditions: **<, >, <=, >=, between**.

1.2.7. Radio Group

Radio Group is used to add a group of radio buttons to the form. Offered options are displayed as radio buttons and Radio Group allows only one option to be selected at once.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Radio Group field to appear in the list of the submissions.
3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be written in the field.
5. **Options**
   Here, you can add the options which will be linked to the radio buttons, and the user should select among them.
   - Set the name and the value of each option.
   - Use the Add Option button to add new options.
   - Delete the options that will not be used anymore.

6. **Conditional Field**
   Check this box if you want the current Radio Group field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

1.2.8. Select

The Select list is a drop-down menu that allows you to select one or more options, depending on the configuration you choose.

The main difference between the Select list and the Radio Button field is that you can add a lot of options without changing the field's size.

The Select list is highly recommended when there are plenty of options.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Select field to appear in the list of the submissions.

3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**

Add additional information to give a hint about the content that should be written in the field.

5. **Reference Field**
   If you want to get the value of a selection according to another selected option you had set before.

6. **Options**
   Here, you can add the options which will be linked to the selections, and the user should choose among them.
   - Set the name and the value of each option.
   - Use the Add Option button to add new options.
   - Delete the options that will not be used anymore.

7. **Conditional Field**
   Check this box if you want the current Select field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

1.2.9. Checkbox Group

The Checkbox Group is used to let the users select more than one option among a complete list of multiple offered options.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.

If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.

By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**

   Check this box if you want the Checkbox Group field to appear in the list of the submissions.

3. **Label**

   Give the field a suitable title that will appear in the form layout.

4. **Help Text**

   Add additional information to give a hint about the content that should be written in the field.

5. **Options**

   Here, you can add the options which will be linked to the Checkbox Group boxes, and the user should select among them.

   - Set the name and the value of each option.
   - Use the Add Option button to add new options.
   - Delete the options that will not be used anymore.

> **Hint**
> - Values do not appear in the form layout.
> - Values can take numerical information and that is so helpful if you want to achieve analytical studies to the submitted data.

6. **Min Selected Options**
   Determine the minimum number of options that the user can select.
7. **Max Selected Options**
   Determine the maximum number of options that the user can select.
8. **Conditional Field**
   Check this box if you want the current Checkbox Group field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

> **Hint**
> You can use the Conditional Field option with only two field types:
> - Select Field
> - Checkbox Field

1.2.10. Header

The Header field is used to give the form a general title and to give the multiple sections of the form their own specific titles.

1. **Label**
   Give the field a suitable title that will appear in the form layout.
2. **Type**
   Choose the type of the header according to the suitable size:
   - Heading h1
   - Heading h2
   - Heading h3

3. **Conditional Field**
Check this box if you want the current Header field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

1.2.11. Paragraph

It is like a solid text that used for fleshing out the form's sections or adding extra explanations.

1. **Content**
This refers to the text that you would like to show up in the form layout.

2. **Conditional Field**
Check this box if you want the current Paragraph field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

> ### *Hint*
> You can use the Conditional Field option with only two field types:
> - Select Field
> - Checkbox Field

1.2.12. File Upload

This field is used to allow the users to attach files to the form.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**
   Check this box if you want the File Upload field to appear in the list of the submissions.

3. **Label**
   Give the field a suitable title that will appear in the form layout.

4. **Help Text**
   Add additional information to give a hint about the content that should be filled in the field.

5. **Type**
   To choose the type of the uploaded document among these types:
   - Image
   - Audio
   - Video
   - PDF
   - Compressed File
   - Document

6. **Size**
   To determine the maximum size allowed for the uploaded document in megabytes.

7. **Max Record Time**
   To determine the maximum record time allowed for the uploaded video or audio in seconds.

8. **Conditional Field**
   Check this box if you want the current File Upload field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

1.2.13. Look Up

The Look Up field is used to bring one or more fields from the submissions of a previously published form and to link them with the current form submission.

With this Look Up field, setting up one to one, one to many, many to many relationships is pretty straightforward.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Look Up field to appear in the list of the submissions.

3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be filled in the field.

5. **Form**
   Select the form whose fields will be called to the current form.
6. **Fields**
   Select some fields to be linked with the current form.

Hint

You can choose more than one field, and this will help you to be more accurate and specific in fetching your information.

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7. **Conditional Field**
   Check this box if you want the current Look Up field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

1.2.14. Calculated

Use the Calculated field to achieve mathematical operations between the fields of the form.

1. **Show in Grid**
   Check this box if you want the Calculated field to appear in the list of the submissions.
2. **Label**
   Give the field a suitable title that will appear in the form layout.
3. **Precision**
   To determine the number of significant decimal digits to the right of the decimal point.

4. **Arithmetic Formula**
   a. The four basic mathematical operations **+, -, *, /** are available.
   b. Brackets can be used to provide clarity to the order in which several operations should be accomplished in a mathematical expression.
   c. Used to erase the whole formula.
   d. Used to show which fields of the form are arithmetic fields, so you can include them in your formula.

1.2.15. Star Rating

The Star Rating field is used to get feedback about a product or service from the users who fill in the form.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.

If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.

By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**

   Check this box if you want the Star Rating field to appear in the list of the submissions.

3. **Label**

   Give the field a suitable title that will appear in the form layout.

4. **Help Text**

   Add additional information to give a hint about the content that should be filled in the field.

5. **Conditional Field**

   Check this box if you want the current Star Rating field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name).
   - Select Value (to determine which value you want the current field to show up according to).

Hint

You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

1.2.16. Location

The Location field is so useful to let the users add location information to the submissions when they fill in the forms. Simply, they can pinpoint the physical address based on the web mapping service of Google Maps.

1. **Show in Grid**
   Check this box if you want the Location field to appear in the list of the submissions.
2. **Label**
   Give the field a suitable title that will appear in the form layout.
3. **Conditional Field**
   Check this box if you want the current Location field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name)
   - Select Value (to determine which value you want the current field to show up according to).

Hint
You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

Note
When you fill in the fields of a form, in the location section, there will be three fields:
- **Map.** to drag and drop the location point icon to locate your address on the interactive map of Google.
- **Title.** to give a title to your address or location.
- **Description.** to add more details about your location.

1.2.17. Autocomplete

The Autocomplete field is used to give users the ability to search and choose among the offered options.

Autocomplete differs from the Select field, here you are able to search by typing one character or more from the option's name and the Autocomplete field will show you only the options that match entered characters.

1. **Required**

Check this box if you want to ensure that the user fills in this field before the submission.

If the user submits the form with an empty required field, the submission does not proceed, instead, an error message is displayed.

By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**

Check this box if you want the Autocomplete field to appear in the list of the submissions.

3. **Label**

Give the field a suitable title that will appear in the form layout.

4. **Help Text**

Add additional information to give a hint about the content that should be written in the field.

5. **Options**

Here, you can add the options which the user should choose among them.

- Set the name and the value of each option.
- Use the Add Option button to add new options.
- Delete the options that will not be used anymore.

6. **Conditional Field**

Check this box if you want the current Autocomplete field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

After you check the box, two fields will show up:
- Select Restricting Field (to choose the selected field name).
- Select Value (to determine which value you want the current field to show up according to).

1.2.18. Section

The Section field is used to split the form into multiple sections.

1. **Label**
   Give the field a suitable title that will appear in the form layout.
2. **Conditional Field**
   Check this box if you want the current Section field to appear in the form only according to a specific selected value of a previously selected field in the same form layout. After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name).
   - Select Value (to determine which value you want the current field to show up according to).

3. **Skip**
   Check this box if you want a button of Skip option to appear in the form layout. This button gives the users an ability to skip the current section to go to the next section of the form.
4. **Back**
   Check this box if you want a button of Back option to appear in the form layout. This button gives the users an ability to go back to the previous section of the form.

5.   Show Title
Check this box if you want to show up the title of the section in the form layout.

Hint
You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

1.3. Public Form & Global Form

At the top right of the form builder window, there are two boxes:

- Check the **number 1** box if you want to make the form a **Public** form. Everyone with the sharing link of the Public form can submit data to it even though there is no Formera account.
- Check the **number 2** box if you want to make the form a **Global** form. Data submitted to a Global form will be accessible from all the users of the current domain on Formera platform.

After checking the box of **Public**, an option to determine the alignment of the text of the form layout will appear **number 3**. You can choose between: Left to Right, Right to Left.

1.4. Save the Form

After you finish editing the form, click on the **Save** button at the lower right corner of the window to save your work.

Formera platform will save the form and will direct you automatically to the forms table.
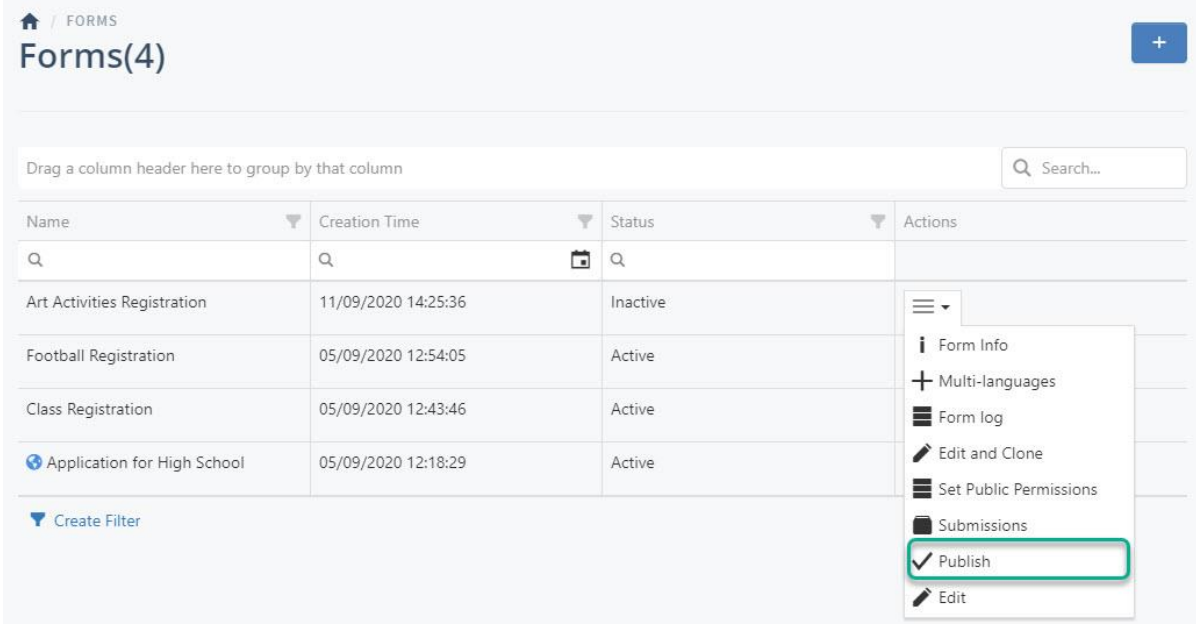
1.5. Publish the Form

To publish your form.

Click on **Actions** button.

From the Actions list, choose the **Publish** option.

A window asking you to choose the expiry date of the form will appear.

The expiry date determines when you will stop receiving submissions from that form.

Pick a specific date and click **Save**, now users can access to your form and you can get submissions.

> *Note*
>
> If you do not determine a specific expiry date, the published form will be active for an unlimited time.

1.6. Forms Management

After finishing the creation of the new form, return to the homepage.

On the left side, there is a panel, click on the third tab called **Forms**.
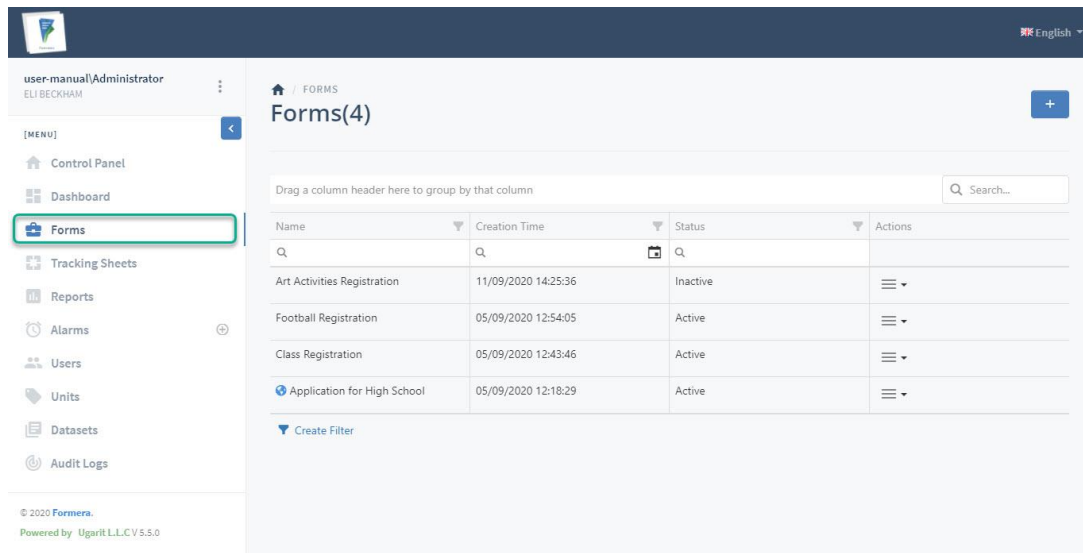
You will notice there will be a complete list of all the forms that have been created in the current domain.
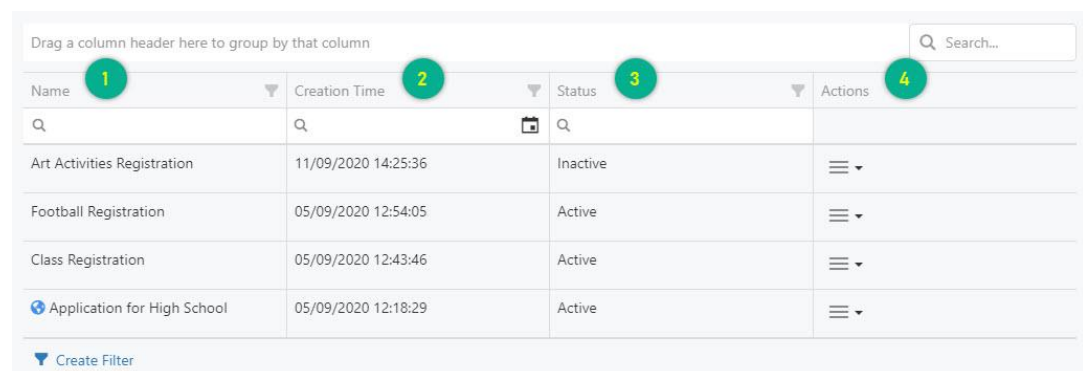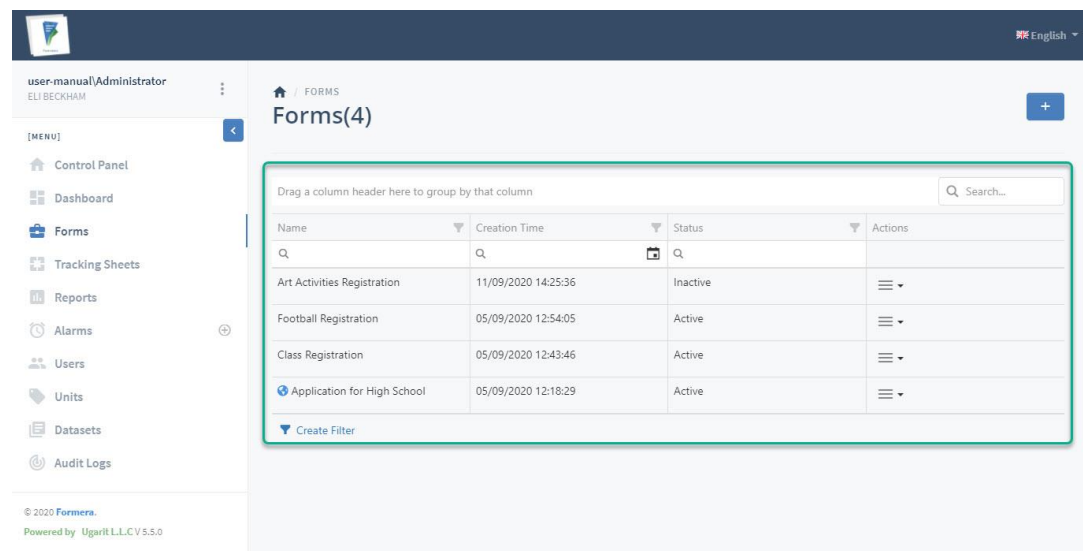
The column headers of that table:

1. **Name.** the name of the form
2. **Creation Time.** the date and time of the creation of the form
3. **Status.** the current status of the form active, inactive, deactivated.
4. **Actions.** the list of options and actions can be applied to the form.

1.6.1. Search & Filtering

Formera search capabilities are so friendly and easy to use. Users can find the right data they search for within seconds.

The Search feature allows you to type any word and the list of the forms will be filtered and updated instantly to show the forms that meet exactly the search word.
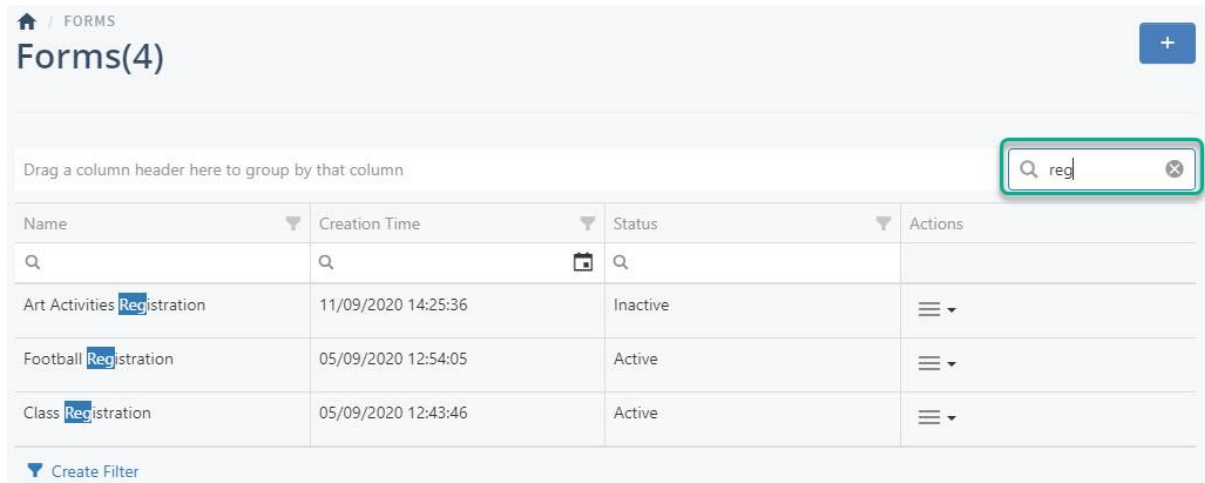
The Search feature can be also applied to each one of the columns of the table to find the results according to the matching criteria.
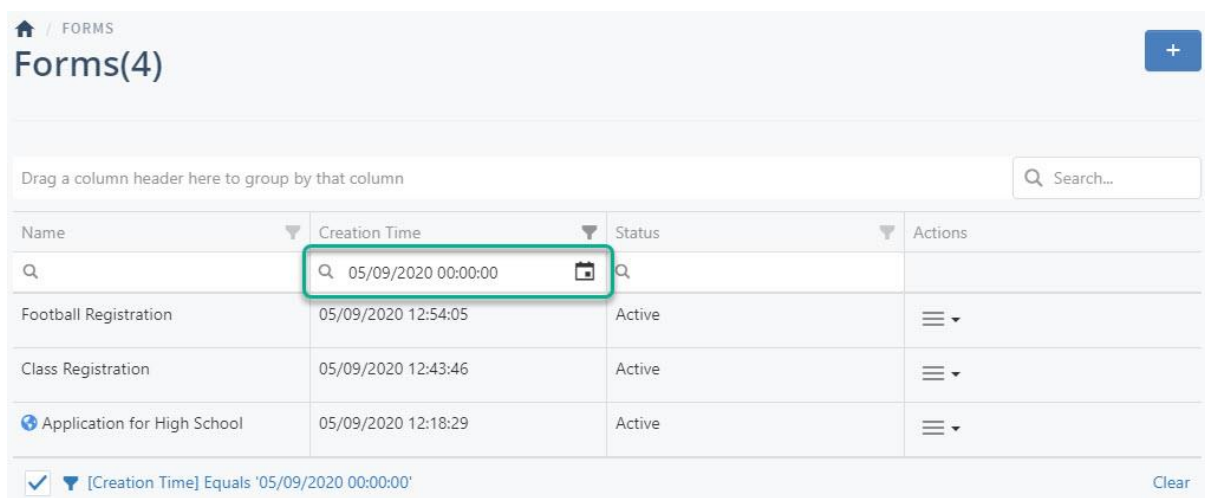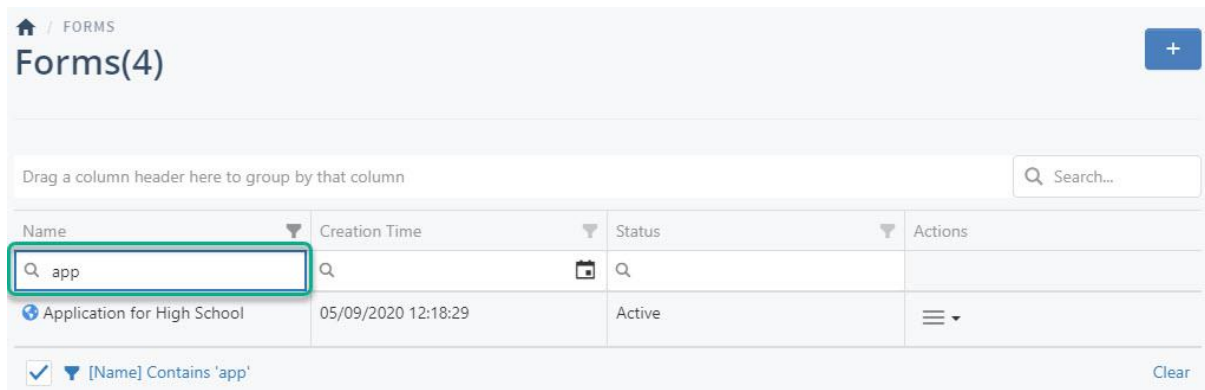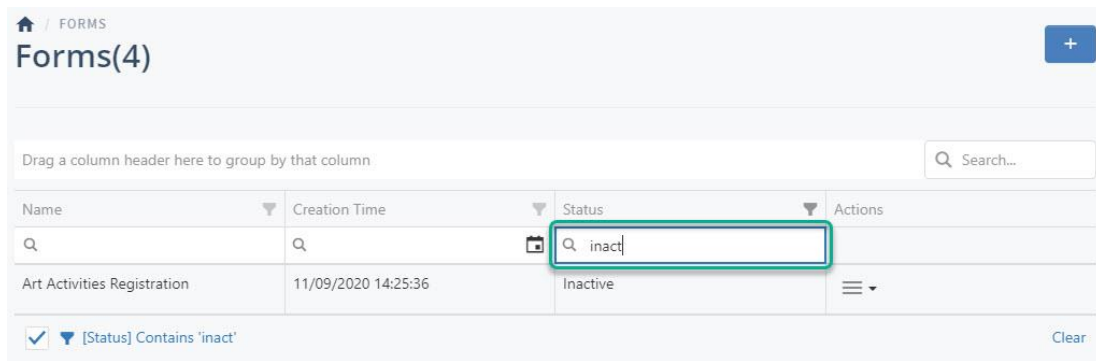
If you would like to build your own complex filter, press the button Create Filter below the table of the forms.
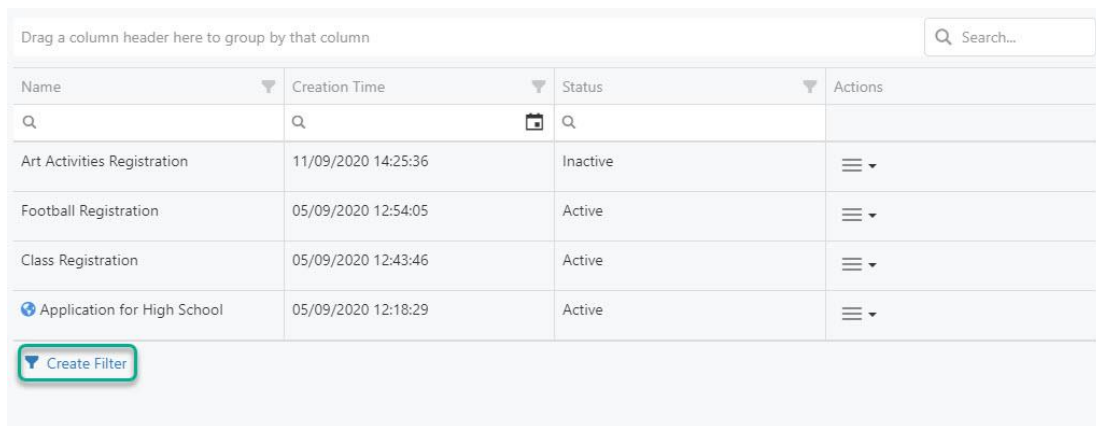
Note

More details about the creation of the complex filters will be discussed in a later section dedicated to the subject.

1.6.2. Data Grouping

You can group your data depending on a specific column, so the data search will be more organized.

To group your data, simply, drag a column header and drop it in the area above the forms table, and the data will be grouped according to that column.
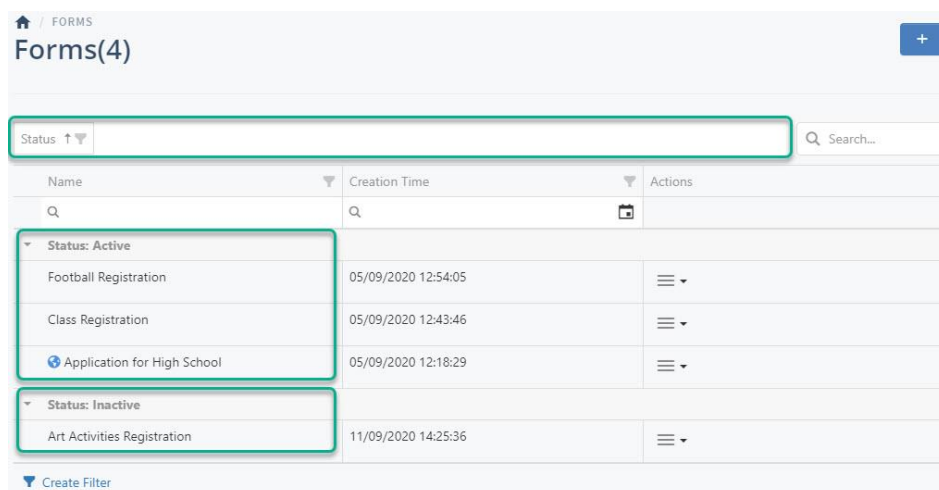
1.6.3. Actions

In Formera, the forms are completely under control. With the multiple options provided by the Actions button, forms management will be an easy mission.

The options of the Actions list are changeable depending on the status of the form.

The status of the form:

- **Inactive**. this means that we are still working on this form and it is not published yet.
- **Active**. this means the form was published.
- **Deactivated**. this means the form will not be used anymore.

For inactive and deactivated forms, the list of Actions includes only:

- Form Info
- Multi-languages
- Form Log
- Edit and Clone
- Set Public Permissions
- Submissions
- Publish
- Edit

After publishing the form, the status changes from inactive to active, the Publish option disappears, additional options appear in the list of Actions:

- Dashboard
- Submit
- Deactivate
- Bulk Submit Template
- Import Data

1.7. Actions List

1.7.1. Form Info

Full information about the form will be shown here.

- **In the first tab,** you find information about:
  - Name
  - Creator
  - Status
  - Active or Not
  - Expiry date
  - Public or Not
  - Public URL
  - Language
  - Global or Not
- **In the second tab,** you find information about the users of the form.
- **In the third tab,** you find information about the fields of the form layout.

1.7.2. Multi-languages

The creation of a multi-language form is so easy in Formera platform, the great feature of Multi-languages in Formera enhances hugely the usability of the created forms as it helps to address the wide range of audiences of different languages at the same time.

To create a multilingual form:

1. Save the current form with its single language.

2. From the table of forms, click on the Actions button.
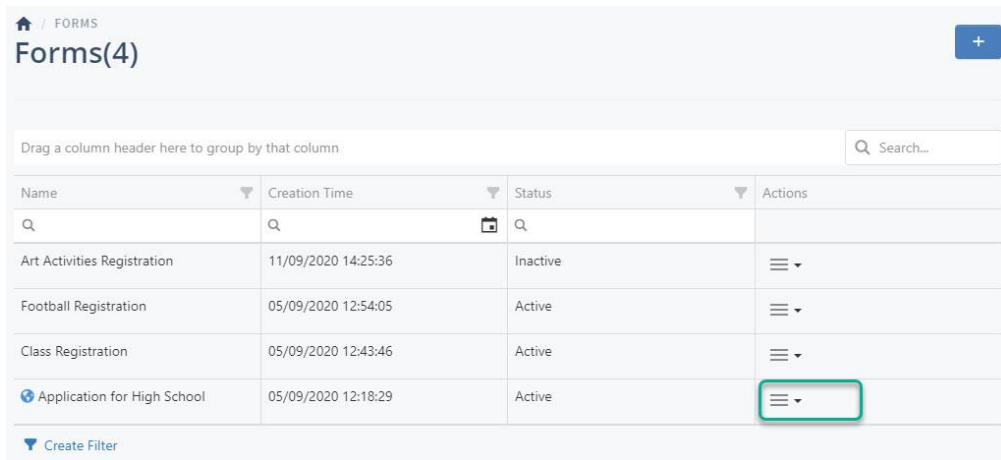
3. From the Actions list, click on the Multi-languages option.
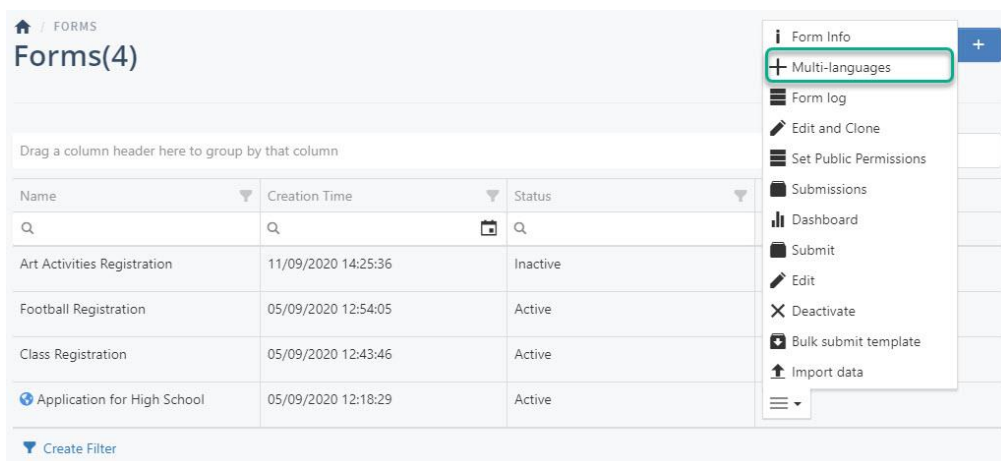
4. The Multi-languages pop-up window will show up, you will find that there is a default language:
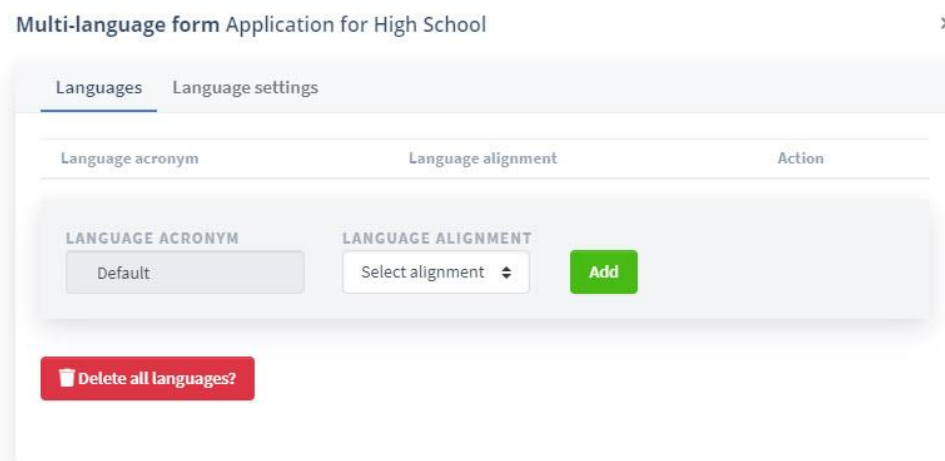
5. Choose the alignment from "**right to left**" or from "**left to right**".

6. Press the Add button, so this language will be added.
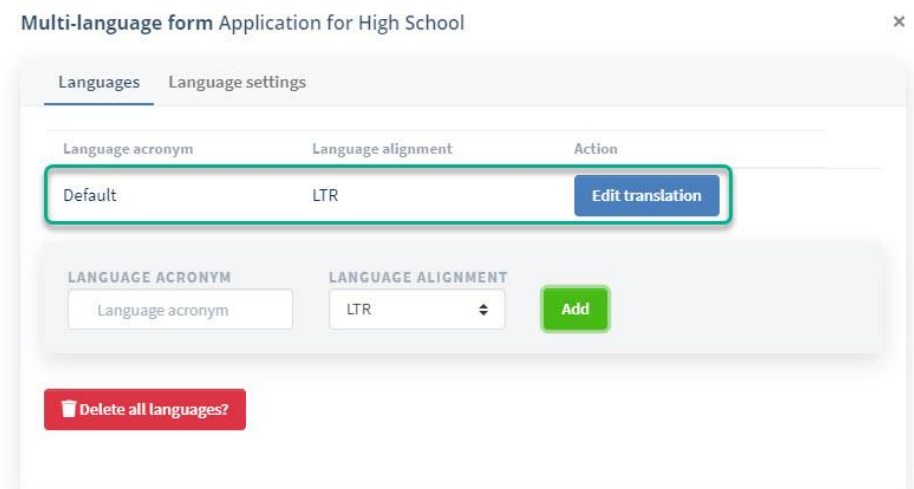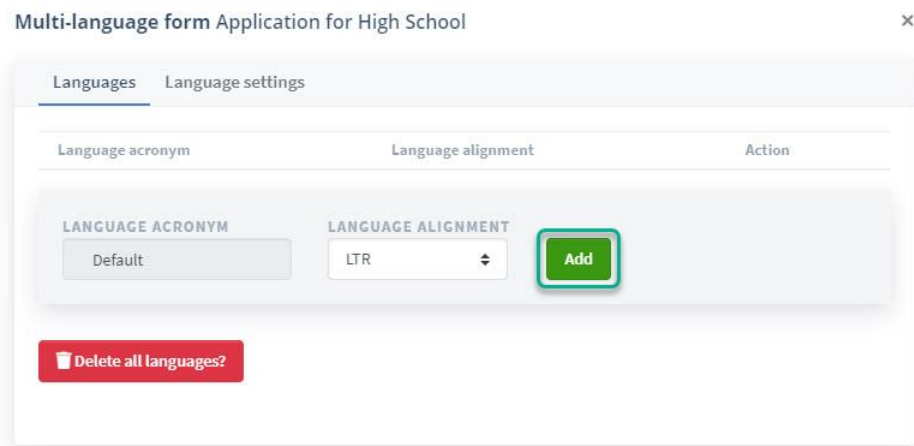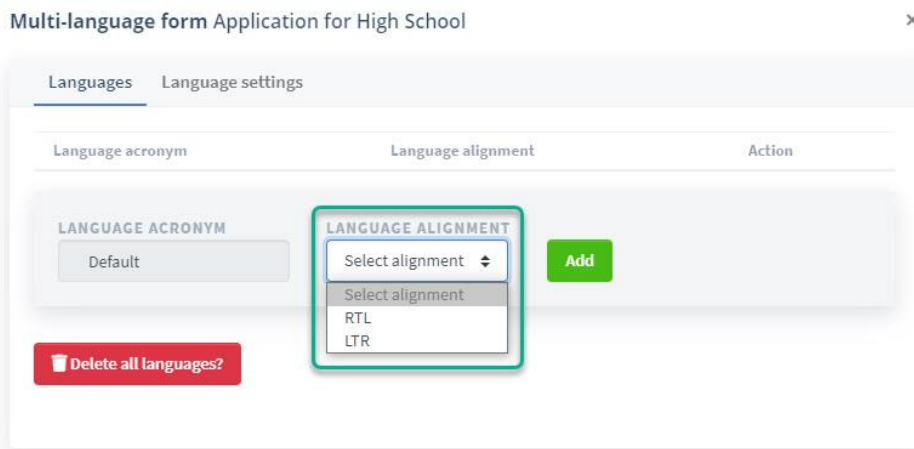
7. To add a new language, type its name in the language acronym field.
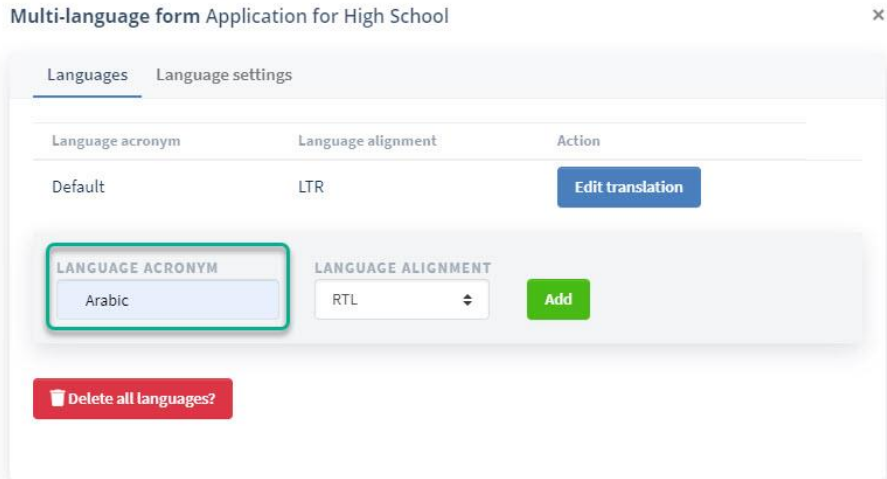
8. Choose the alignment from "**right to left**" or from "**left to right**".
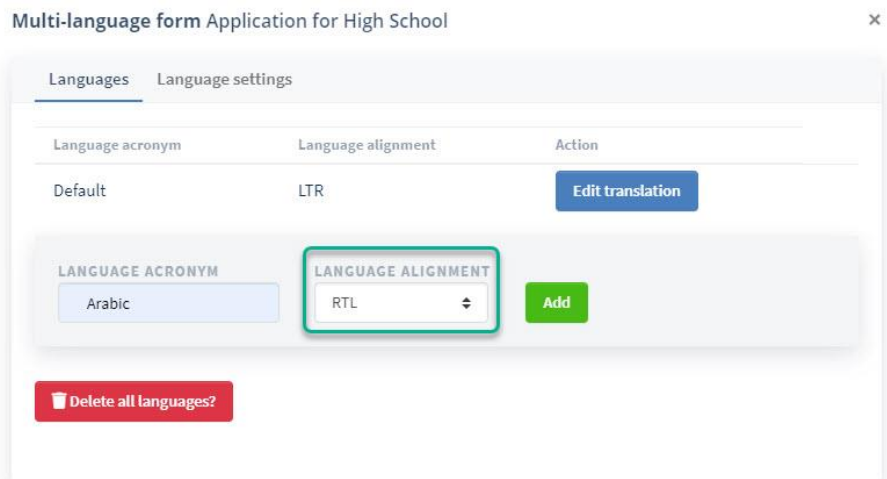
9. After adding the language **number 1**, click on the Edit Translation button **number 2** or move to the second tab called Language Settings **number 3**, so you can manually edit the translation of the fields of the form layout.
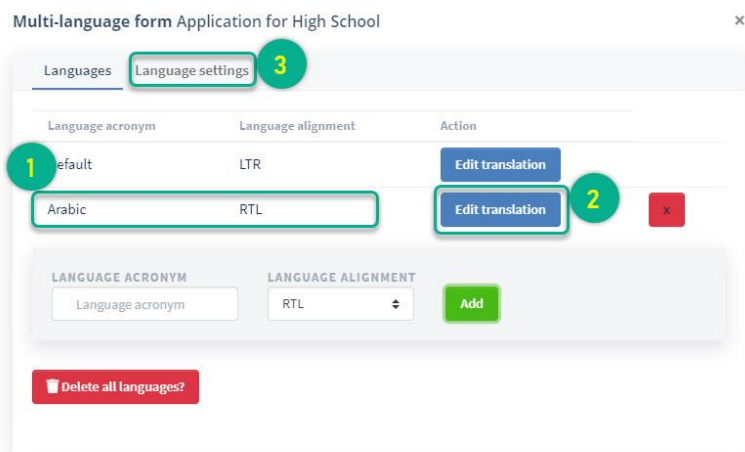
10. After writing the suitable translation **number 1**, press the Save button **number 2**, so the translation will be added.
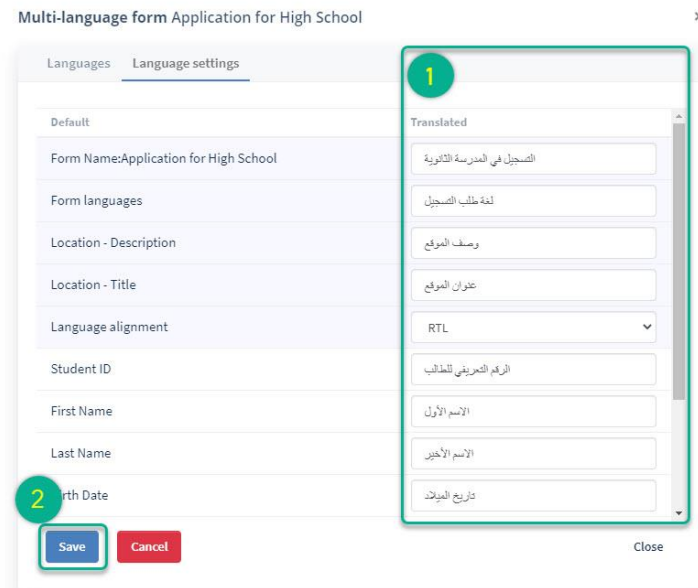
At the upper left of the submit window, you will be able to choose among the added languages.

Depending on the language you choose, the alignment of the content will be changed from "right to left" to "left to right" or vice versa.

> ### Hint
> You can choose the language of the public forms directly when you are building them.

1.7.3. Form Publishing

After completely finishing the construction of the form, you should publish it, so users can fill in the fields and submit data.

To publish a form:

1. Click on the Actions button in the table of the forms.
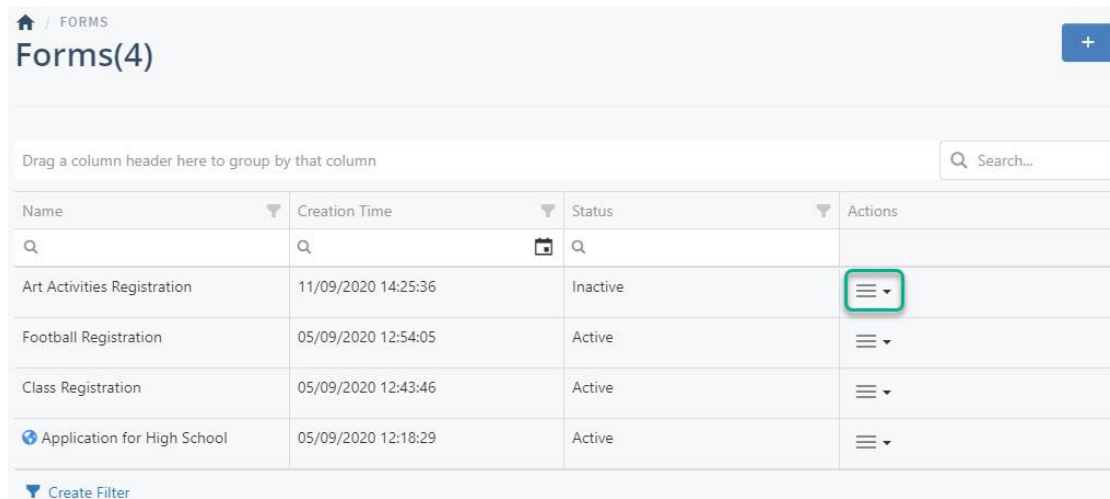
2. Click on the Publish option from the list of Actions.
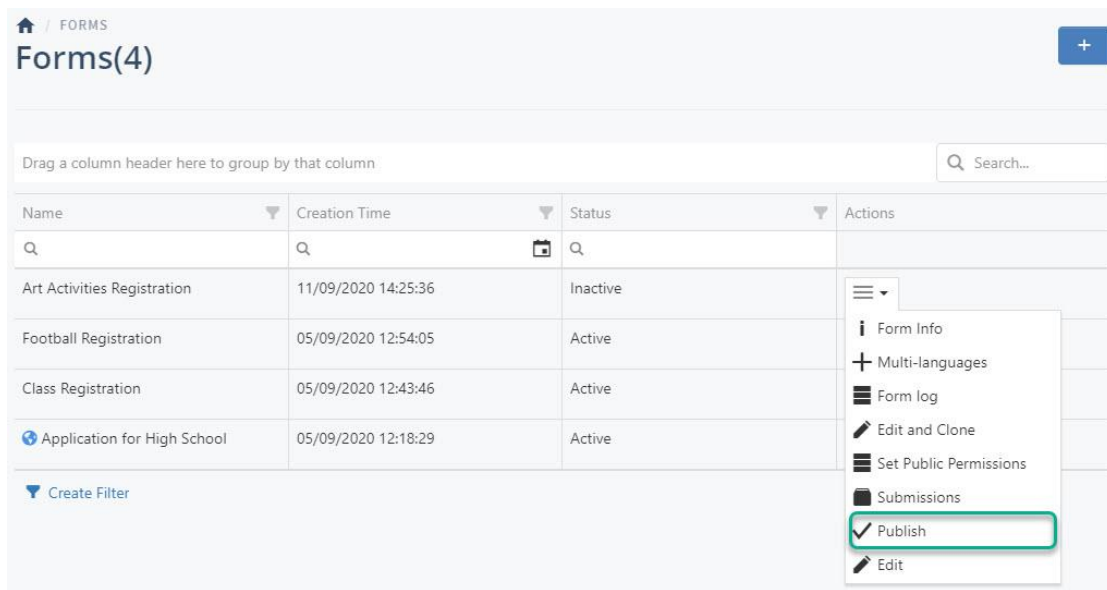
3. A new window appears, asking you to determine the expiry date of the form.

4. Pick a date and click the Save button.

The form is published now and you can get submissions from it.
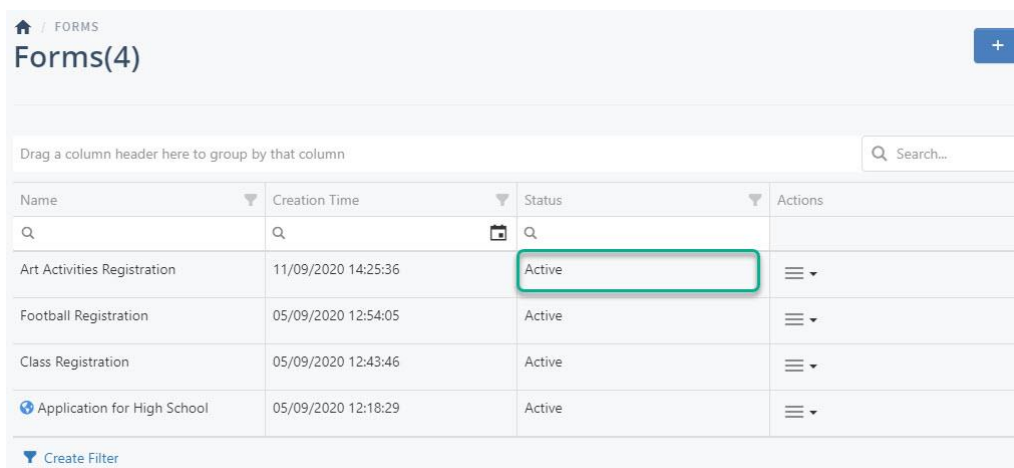
After publishing the form, the Publish option will disappear, and new options will be added to the Actions list, such as:

- Submit
- Dashboard
- Deactivate
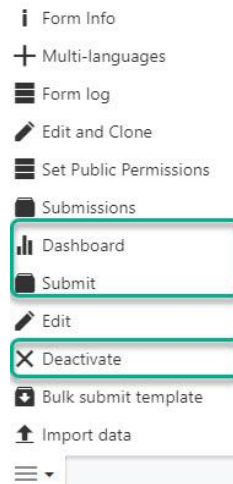
1.7.4. Form Editing

The Edit option is used to make changes to the structure of the form layout and to modify the settings of its components.
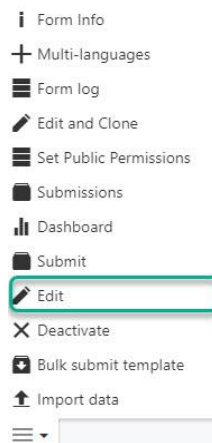
1.7.5. Edit and Clone

The Edit and Clone option is used to make a copy of the form, then make changes to the structure of that copy and modify the settings of its layout's components.
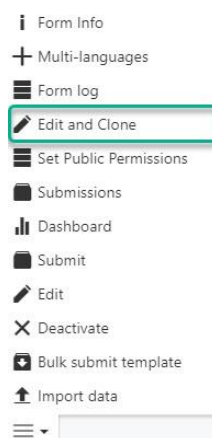
1.7.6. Submit

Select the Submit option from the Actions list.
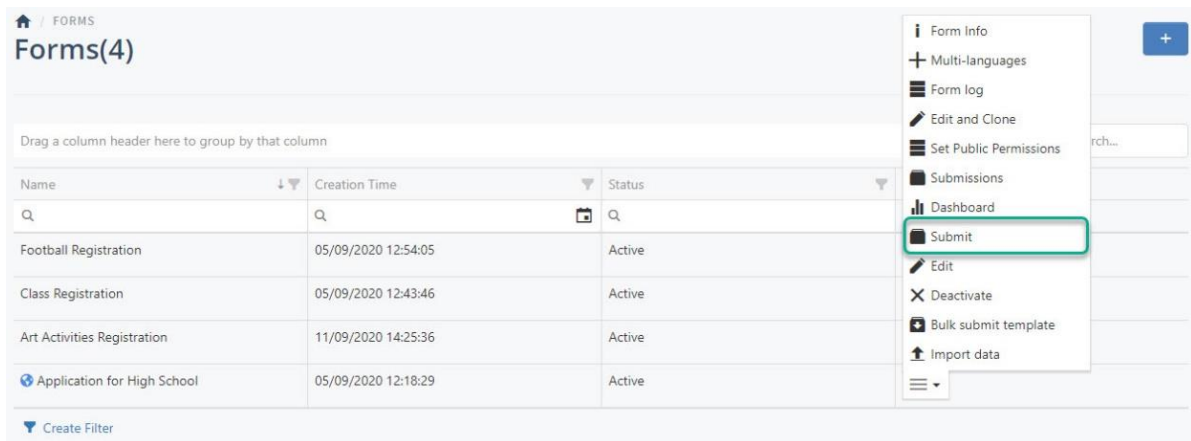
So, you can fill in the fields of the form.

Click on the Submit button to make your submission.

1.7.7. Deactivate

Select the Deactivate option from the Actions list, so you can make the form disabled.
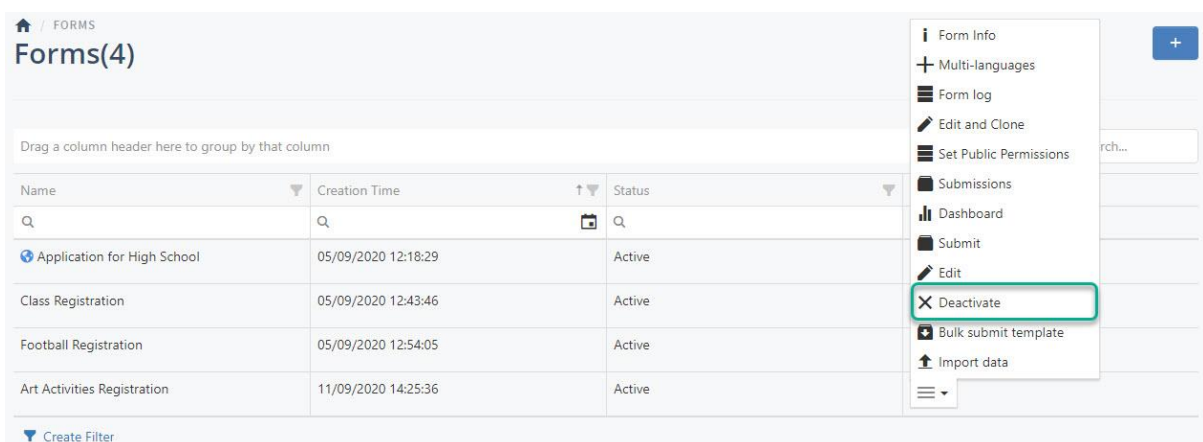
A warning message will pop up to make sure that you really want to deactivate the form.

Press **Yes** button, and the status of the form will be changed to Deactivated.

1.8. Submissions

The submissions of your forms are stored securely on our servers.

To access the submissions data:

- Click on the Actions button from the list of the forms.
- Click on the option called Submissions.

Here, you can easily manage all the data of submissions, you are able to:

- Filter
- Sort
- Organize in groups
- Arrange the columns
- Export

The table of submissions will provide a detailed view of all submissions of your form, so you have the ability to manage all of them.

On the upper right side of the submissions table:

- Button **number 1** is used to determine the columns that you want to show in the table.
- Button **number 2** is used to export the submissions table as an excel file.

1.8.1. Data Filtering

Formera platform provides you with multiple built-in filtering options.

- **Simple Filters**
- **Advanced Filters**
- **Complex Filters**

1.8.2. Simple Filters

- **Date Filter**
  On the submissions page, you can also choose to display only the entries collected and submitted within a specific date range.

Simply, pick two different dates from the calendars **number 1** and click the Search button **number 2**.
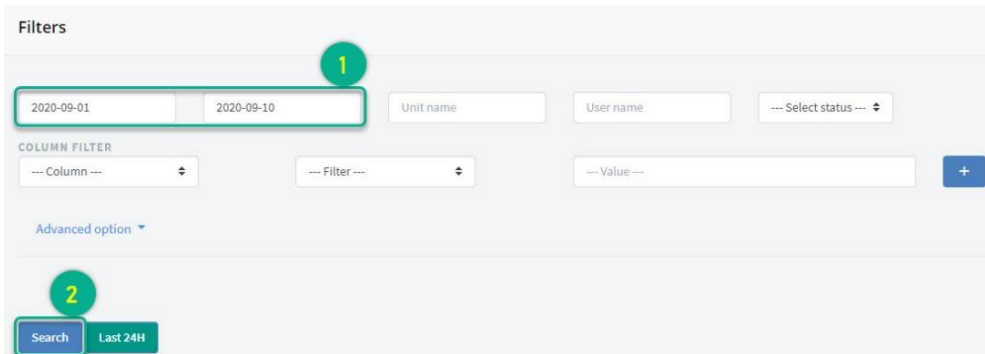
- **Basic Information Filter**
  Here, you can filter based on:
    - Unit Name
    - User Name
    - Status: Pending, Approved or Rejected.

  Simply, select the suitable information from the three fields **number 1** and click the Search button **number 2**.

1.8.3. Advanced Filters

- **Column Filter**
    1. Select the name of the column header.
    2. Choose the filter type: is equal, greater, smaller, … etc.
    3. Determine the value.
    4. Click on the + sign button to add the filter.
    5. Click on the Search button to start filtering the data table.

- **Advanced Option (Aggregation by Child Form)**
  This filtering option returns the number of the child forms for each submission. It provides you with the information related to the child forms, so you will know for each parent form how many child forms linked with it.
    1. Select the child form.
    2. Choose the start date.
    3. Choose the end date.
    4. Click on the + sign button to add the filter.
    5. Click on the Search button to start filtering the data table.

Note
You will gain access to the data of child forms too.

1.8.4. Complex Filters

To build your own customized logical filter, click on the **Create Filter** button located below the table of the submissions.
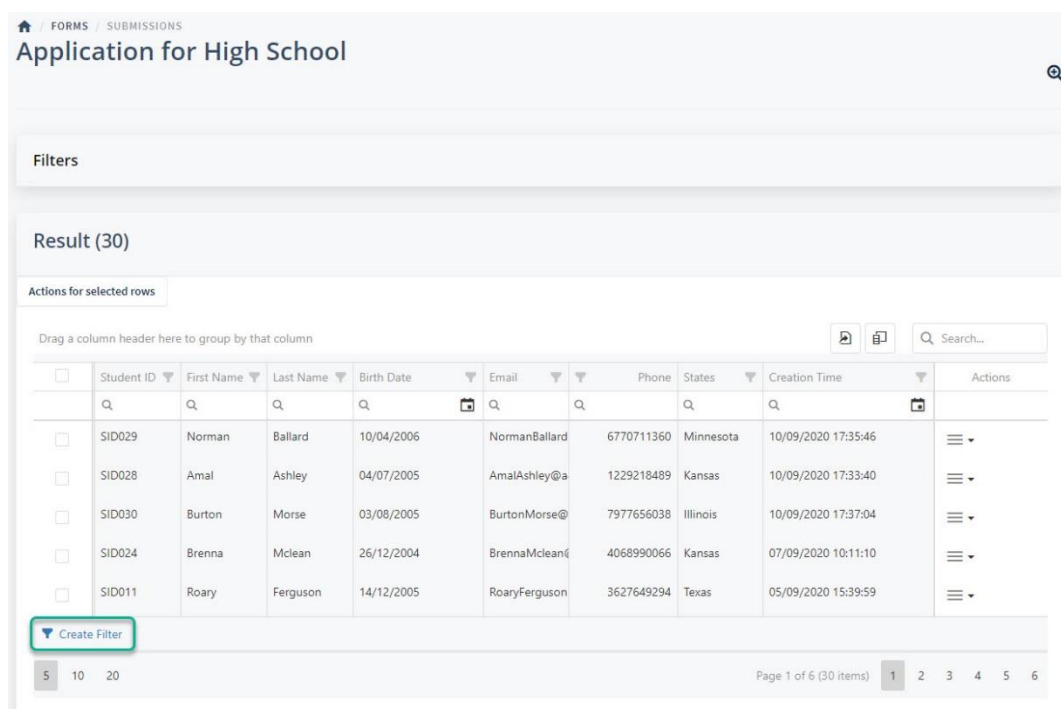
With complex filters, you will be able to build and create whatever scenario you want to completely control data with high flexibility.

Basically, complex filters are build depending on four main logical functions:

- And
- Or
- Not And
- Not Or

The conditions identified inside each filter are built based on a wide collection of functions, such as:

- Contains
- Not contain
- Starts with
- Ends with
- Equals
- Does not equal
- Is blank
- Is not blank
- Is any of
- Is none of
- Equals
- Does not equal
- Is less than
- Is greater than
- Is less than or equal to
- Is greater than or equal to
- Is between

Note
The suggested functions in each condition depend on the data type of the selected column header (text, number, date, …etc).

To build a complex filter:

1. Select one of the logical functions to start your filter with it:
   - And
   - Or
   - Not And
   - Not Or

2. Click on the **+ sign** button.

3. Choose between the two options: **Add Condition, Add Group**.

4. If you choose **Add Condition**, three fields will appear:
    -   **First field.** to choose the name of the column header.
    -   **Second field.** to select the condition function.
    -   **Third field.** to determine the value of the condition.

Example

Note
-   You can add one condition or set of conditions at the same level.
-   The suggested condition functions differ depending on the data type of the column header (text, number, date, ...etc).

5. If you choose **Add Group**, you will be able to build nested condition statements contained within the definition of other condition statements.

Note
You can link between multiple groups of condition statements, using the logical functions And, Or, Not And, Not Or.

6. After finishing the construction of the new filter, click on the **OK** button, the filter will be added and it will be applied immediately on the table of the submissions.
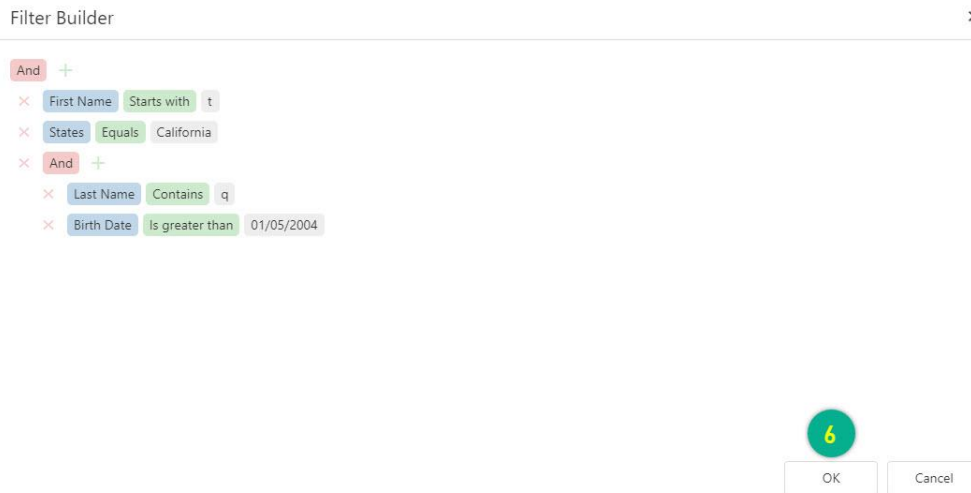
Hint
To delete the filter you have added, just click on the Clear button in the lower right of the table of the submissions.

1.8.5. Control Submissions

In the last column of the submissions table, click on the Actions button, the following functionality options will appear:
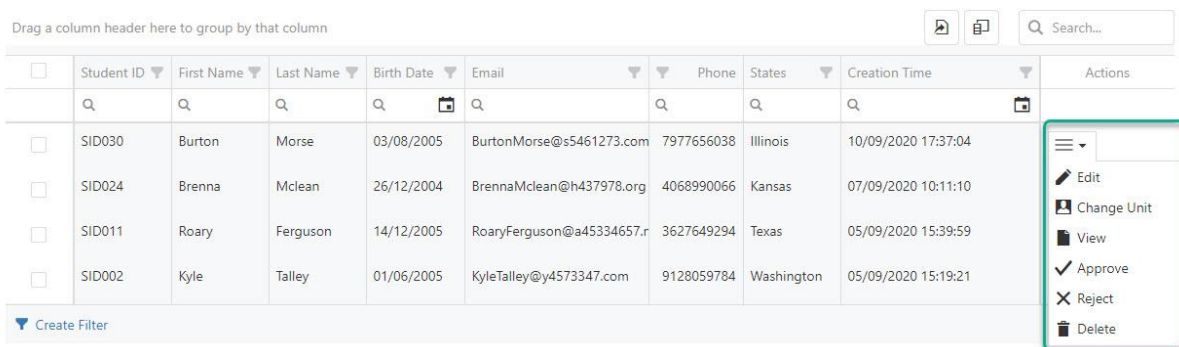
- **Edit**. to edit submission information.
- **Change Unit.** to change the data accessibility level.
- **View.** to display the data of the submission, and all other data associated with it from other forms.
- **Approve.** to approve the submission.
- **Reject.** to reject the submission.
- **Delete.** to remove the data of the submission.

2. Datasets

Formera provides the customers with a powerful tool that enables them to build advanced forms that contain multiple selection options nested with each other and linked to a huge amount of data.

> ### *Example*
> If you want to let the users determine their country name, province name, and the city among a large number of options, it will be so suitable to add a three-level dataset library and linked it with a Select field, as we will explain later.

The Datasets feature also supports adding the checkbox and radio group fields that are linked to a relatively big number of options, to the form layout. That is so useful and time-saving compared to adding the options, one by one in traditional checkbox and radio group fields.

From the homepage of Formera platform, click on the tab called **Datasets** in the left side panel.

You will notice there is a complete listing of all the datasets that have been added previously to the current domain.

The column headers of that table of datasets:

- **Name.** the name of the dataset.
- **Creation Time.** the date and time of the creation of the dataset.

- **Field Type.** the type of the field linked with this dataset, such as Select, Checkbox Group, and Radio Group.

Name	Creation Time	Field Type	Description	Level count	Languages Count	Source File	Actions
Currencies	17/09/2020 12:36:56	Radio group		1	2	Download file	x
States	05/09/2020 11:53:11	Select		1	1	Download file	x
Postal_Codes	17/09/2020 11:54:23	Select		1	1	Download file	x
States_Cities	17/09/2020 11:56:56	Select	To link each state with its cities.	2	1	Download file	x
Countries	17/09/2020 12:34:56	Checkbox	List of the middle east countries	1	2	Download file	x

- **Description.** a short description of the purpose of that dataset.
- **Level Count.** the number of the levels of the dataset.
- **Source File.** download link of the dataset file.
- **Languages Count.** the number of languages supported by that dataset.
- **Actions.** the actions can be applied to the dataset. Currently available, Delete option.

2.1. Add New Dataset

2.1.1. Dataset linked with Select

Steps to add a new dataset linked with the Select field type to your domain:

Click on the **Download Template** button at the top right of the window of the Datasets tab.

A pop-up window appears, with three fields: **Name**, **Level Count** and **Language Count**. Fill in those fields, for example, Name: Countries_Provinces_Cities, Level Count: Three and Language Count: 1.

> ### *Note*
> Currently available:
> - **Levels:** from 1 to 5 levels.
> - **Languages:** 2 supported languages.

Click on the **Download Template** at the bottom of that pop-up window.

An Excel file will be downloaded immediately, open that file.

You will notice the Excel file has a specific format, and there are some simple rules you should follow, such as:

- Do not change the file name, file format, or the order of the cells.
- Enter the name of the field after level header at row 11.
- The level string must be repeated in each record of child levels.
- Enter the list of data starting by row 12.
- Do not leave empty rows or empty cells before full one in a row.
- Any duplicated row will be eliminated automatically.

Fill in the columns' fields of the three levels with suitable data.

Save the file.

From the window of the datasets tab on Formera platform, click on the **+ sign** button at the top right, to import the Excel file to your domain on the platform.

A new pop-up window appears, click on the **Choose File** button at the top of the window to upload the Excel file.

After uploading the file, two fields will be filled automatically. They are **Name** and **Level Count** fields.

Fill in the Description field (optional).

Select the type of the field among **Select**, **Checkbox**, and **Radio Group** options (if applicable) (in our case, choose Select type).

Click on the **Save** button at the lower right of that window.

You notice that the new dataset has been added successfully.

> **Note**
>
> The number of the options of the field type (**Select**, **Checkbox**, **Radio Group**) available to choose among them, depends basically on the value of the Level Count. For example, **Level Count** equals to or greater than 2, will be linked only with the **Select** type.

2.1.2. Dataset linked with Checkbox

Steps to add a new dataset linked with the Checkbox field type to your domain:

Click on the **Download Template** button at the top right of the window of the Datasets tab.
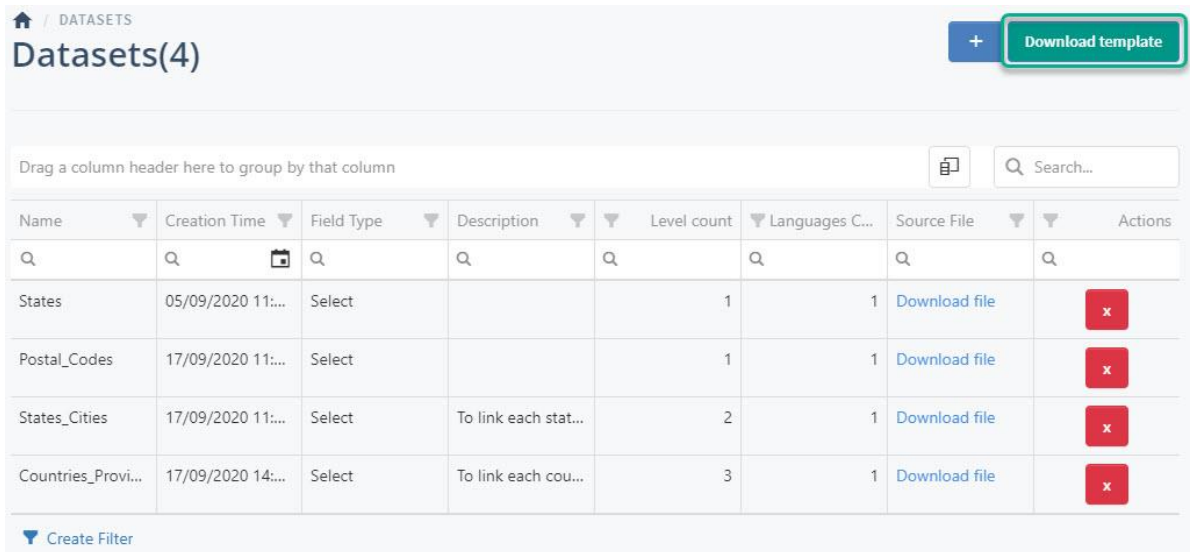
A pop-up window appears, with three fields: **Name**, **Level Count** and **Language Count**. Fill in those fields, for example, Name: Countries, Level Count: One and Language Count: 1.

> **Note**
>
> Currently available:
> - **Levels:** from 1 to 5 levels.
> - **Languages:** 2 supported languages.

Click on the **Download Template** at the bottom of that pop-up window.

An Excel file will be downloaded immediately, open that file.

You will notice the Excel file has a specific format, and there are some simple rules you should follow, such as:

- Do not change the file name, file format, or the order of the cells.
- Enter the name of the field after level header at row 11.
- The level string must be repeated in each record of child levels.
- Enter the list of data starting by row 12.
- Do not leave empty rows or empty cells before full one in a row.
- Any duplicated row will be eliminated automatically.

Fill in the column's fields of the level one with suitable data.

Save the file.

From the window of the datasets tab on Formera platform, click on the **+ sign** button at the top right, to import the Excel file to your domain on the platform.

A new pop-up window appears, click on the **Choose File** button at the top of the window to upload the Excel file.

After uploading the file, two fields will be filled automatically. They are **Name** and **Level Count** fields.

Fill in the Description field (optional).

Select the type of the field among **Select**, **Checkbox**, and **Radio Group** options (if applicable) (in our case, choose Checkbox type).

Click on the **Save** button at the lower right of that window.

You notice that the new dataset has been added successfully.

Note
The number of the options of the field type (**Select**, **Checkbox**, **Radio Group**) available to choose among them, depends basically on the value of the Level Count. For example, **Level Count** equals to or greater than 2, will be linked only with the **Select** type.

2.1.3. Dataset linked with Radio Group

Steps to add a new dataset linked with the Radio Group field type to your domain:

Click on the **Download Template** button at the top right of the window of the datasets tab.

A pop-up window appears, with three fields: **Name**, **Level Count** and **Language Count**. Fill in those fields, for example, Name: Currencies, Level Count: One and Language Count: 1.

> ### *Note*
> Currently available:
> - **Levels:** from 1 to 5 levels.
> - **Languages:** 2 supported languages.

Click on the **Download Template** at the bottom of that pop-up window.

An Excel file will be downloaded immediately, open that file.

You will notice the Excel file has a specific format, and there are some simple rules you should follow, such as:

- Do not change the file name, file format, or the order of the cells.
- Enter the name of the field after level header at row 11.
- The level string must be repeated in each record of child levels.
- Enter the list of data starting by row 12.
- Do not leave empty rows or empty cells before full one in a row.
- Any duplicated row will be eliminated automatically.

Fill in the column's fields of the level one with suitable data.

Save the file.

From the window of the datasets tab on Formera platform, click on the **+ sign** button at the top right, to import the Excel file to your domain on the platform.

A new pop-up window appears, click on the **Choose File** button at the top of the window to upload the Excel file.

After uploading the file, two fields will be filled automatically. They are **Name** and **Level Count** fields.

Fill in the Description field (optional).

Select the type of the field among **Select**, **Checkbox**, and **Radio Group** options (if applicable) (in our case, choose Radio Group type).

Click on the **Save** button at the lower right of that window.

You notice that the new dataset has been added successfully.

> ### *Note*
> The number of the options of the field type (**Select**, **Checkbox**, **Radio Group**) available to choose among them, depends basically on the value of the Level Count. For example, **Level Count** equals to or greater than 2, will be linked only with the **Select** type.

2.2. Use Datasets in the Form

2.2.1. Datasets linked with Select

After adding the new dataset, from the homepage of Formera, on the left side, click on the tab called **Forms**. Create a new form or choose to edit one of the forms that have been created in the current domain. In the form builder window, click on the **Upload Library** button.

A list will pop-up to show you the datasets that have been added to the current domain. You notice the datasets are classified into three different tabs: **Select**, **Checkbox**, and **Radio Group**.

The dataset which we want to add to the form is linked to the **Select** type, so you will notice it is classified under the **Select** tab.

Click on the **Add** button beside the dataset name which you want to add to the form.

The field of that library will be added directly to the form layout.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Dataset field to appear in the list of the submissions.
3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be filled in the field.
5. **Conditional Field**
   Check this box if you want the current Dataset field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.

After you check the box, two fields will show up:
- Select Restricting Field (to choose the selected field name).
- Select Value (to determine which value you want the current field to show up according to).

6. **Dataset Fields Labels**

    You can give the fields of the dataset columns new titles that will appear in the form layout. Default labels are identical to the titles of the columns' headers of the uploaded Excel file.

> *Note*
>
> You can use the Conditional Field option with only two field types:
> - Select Field
> - Checkbox Field

Save the form and move to the **Submit** page, you see there are three fields labeled **Country**, **Province**, and **City**.

You will notice that the **Province** field is linked with the **Country** field and its selection options differ according to the option selected in the **Country** field.

The **City** field is also linked with the **Province** field and its selection options differ according to the option selected in the **Province** field.

Example

Country*

United Kingdom

Province*

England

England
Wales

London

Country*

United Kingdom

Province*

England

City*

London

London
Bedford
Bristol
Leicester
York

Country*

Mexico

Province*

Baja California

Baja California
Tamaulipas

Ensenada

Country*

Mexico

Province*

Tamaulipas

City*

Matamoros

Matamoros
Nuevo Laredo
Reynosa
Tampico

2.2.2. Dataset linked with Checkbox

After adding the new dataset, from the homepage of Formera, on the left side, click on the tab called **Forms**. Create a new form or choose to edit one of the forms that have been created in the current domain. In the form builder window, click on the **Upload Library** button.

A list will pop-up to show you the datasets that have been added to the current domain. You notice the datasets are classified into three different tabs: **Select**, **Checkbox**, and **Radio Group**.

The dataset which we want to add to the form is linked to the **Checkbox** type, so you will notice it is classified under the **Checkbox** tab.

Click on the **Add** button beside the dataset name which you want to add to the form.

The field of that library will be added directly to the form layout.

1. **Required**
   Check this box if you want to ensure that the user fills in this field before the submission.
   If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
   By default, a red asterisk appears at the right of the required field's label.
2. **Show in Grid**
   Check this box if you want the Dataset field to appear in the list of the submissions.
3. **Label**
   Give the field a suitable title that will appear in the form layout.
4. **Help Text**
   Add additional information to give a hint about the content that should be filled in the field.
5. **Conditional Field**
   Check this box if you want the current Dataset field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
   After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name).
   - Select Value (to determine which value you want the current field to show up according to).
6. **Dataset Fields Labels**
   You can give the fields of the dataset columns new titles that will appear in the form layout. Default labels are identical to the titles of the columns' headers of the uploaded Excel file.

Note

You can use the Conditional Field option with only two field types:
- Select Field
- Checkbox Field

Save the form and move to the **Submit** page, you see there is a Checkbox field with the options which have been added via the imported dataset called Countries.

Example

In the Checkbox selection field, users can choose one option and multiple options.

2.2.3. Dataset linked with Radio Group

After adding the new dataset, from the homepage of Formera, on the left side, click on the tab called **Forms**. Create a new form or choose to edit one of the forms that have been created in the current domain. In the form builder window, click on the **Upload Library** button.

A list will pop-up to show you the datasets that have been added to the current domain. You notice the datasets are classified into three different tabs: **Select**, **Checkbox**, and **Radio Group**.

The dataset which we want to add to the form is linked to the **Radio Group** type, so you will notice it is classified under the **Radio Group** tab.

Click on the **Add** button beside the dataset name which you want to add to the form.

The field of that library will be added directly to the form layout.

1. **Required**
Check this box if you want to ensure that the user fills in this field before the submission.
If the user submits the form with an empty required field, the submission does not proceed, instead an error message is displayed.
By default, a red asterisk appears at the right of the required field's label.

2. **Show in Grid**
Check this box if you want the Dataset field to appear in the list of the submissions.

3. **Label**
Give the field a suitable title that will appear in the form layout.

4. **Help Text**
Add additional information to give a hint about the content that should be filled in the field.

5. **Conditional Field**
Check this box if you want the current Dataset field to appear in the form only according to a specific selected value of a previously selected field in the same form layout.
After you check the box, two fields will show up:
   - Select Restricting Field (to choose the selected field name).
   - Select Value (to determine which value you want the current field to show up according to).

6. **Dataset Fields Labels**
You can give the fields of the dataset columns new titles that will appear in the form layout. Default labels are identical to the titles of the columns' headers of the uploaded Excel file.

Note
You can use the Conditional Field option with only two field types:
   - Select Field
   - Checkbox Field

Save the form and move to the **Submit** page, you see there is a Radio Group field with the options that have been added via the imported dataset called Currencies.

Example

In the Radio Group selection field, users can choose only one option among the offered options.
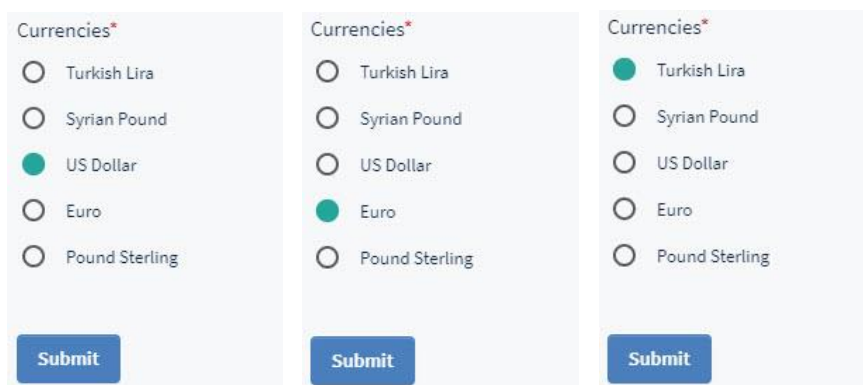
2.3. Datasets Management

Formera applies an advanced approach to manage the listed data. That approach includes comprehensive search and filtering options, data grouping options, customized tables, and complex logical filters.

All of those options are also available to manage the tables of the datasets.
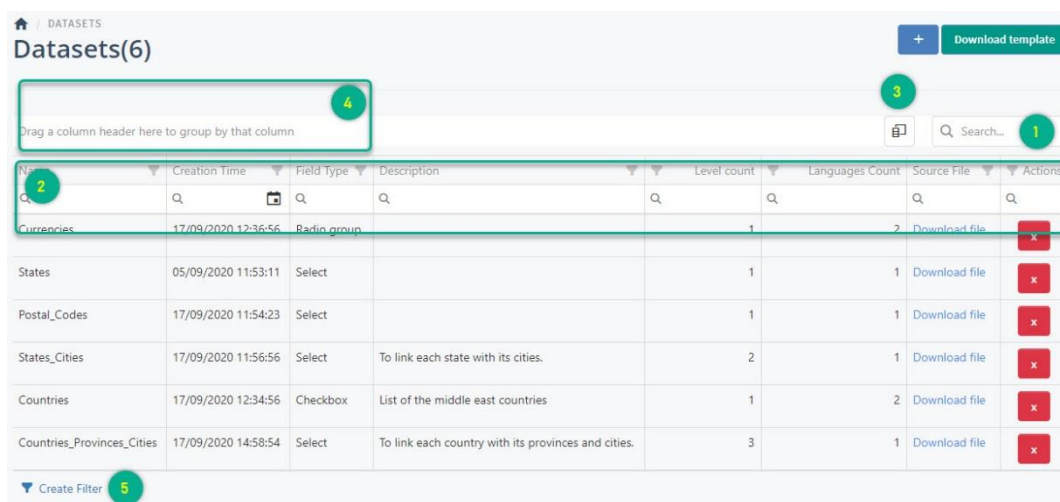
1. **General Search.**
   This feature allows you to type any word and the list of the datasets will be filtered and updated instantly to show the datasets that meet exactly the search word.
2. **Column Search.**
   The search feature can be also applied to each one of the columns of the table to find the results according to the matching criteria.
3. **Column Chooser.**
   To hide a column from the table of the listed data, just drag a column header and drop it in the area appears when you click on the Column Chooser button.
4. **Data Grouping.**
   To group your data, simply, drag a column header and drop it in the area above the forms table, and the data will be grouped according to that column.
5. **Create Filter.**
   Click the Create Filter button below the table of the datasets, to build your own complex filter.

3. Users & Units

3.1. Domain Information

Formera provides comprehensive features for listing the details of the domain related to the subscription plan on the platform. From the homepage of the platform, click on the tab called **Users** in the left side panel.
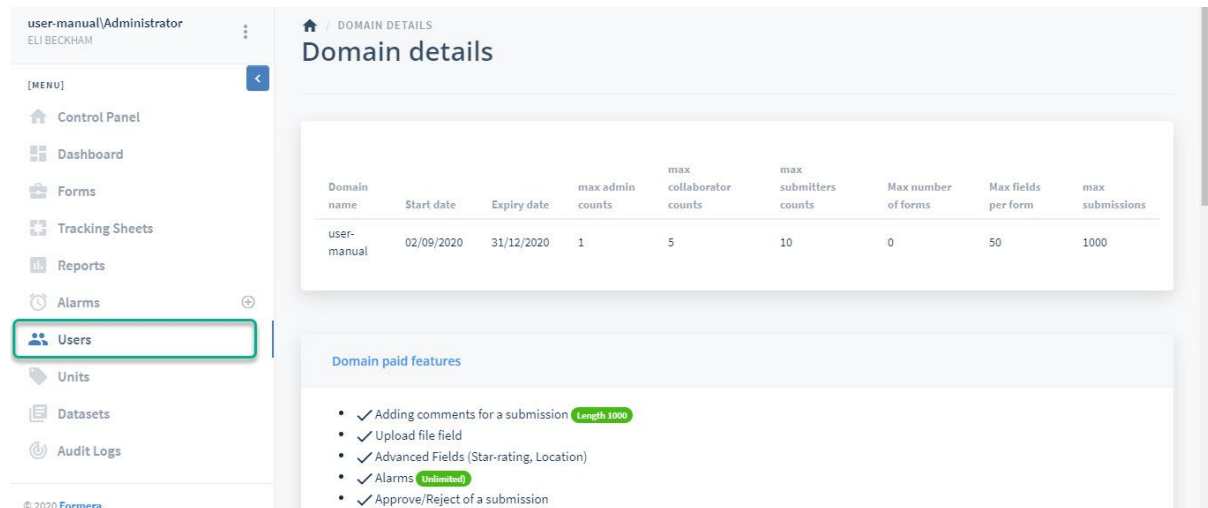
You will notice there is a full listing of:

- The basic information about the subscription domain.
- More details about the paid features of that domain.
- The users registered in the current domain.

3.1.1. Basic information

The column's headers of the table of domain information:

- Domain name
- Start date
- Expiry date
- Max admin counts

- Max collaborator counts
- Max submitters counts
- Max number of forms
- Max fields per form
- Max submissions

3.1.2. Paid Features

More information about the additional paid features of that domain, such as:

- Adding comments for a submission
- Upload file field
- Advanced fields, Star-Rating and Location
- Alarms
- Approve & reject of a submission
- Include calculated field
- Data import, bulk Submit
- Permission by field
- Multi-language forms
- Datasets
- Send report by email
- Tracking Sheet Count
- Assessments

3.1.3. Registered Users

The column's headers of the registered users' table:

User name	Full name	Email address	Role	Unit name	Active	Actions
Administrator	Eli Beckham	klopabraham@g32598.com	ADMIN	Default	✅	≡ ▾
ClassRegistrar	Louis Perkins	louisperkins@a45367.net	SUBMITTER	Classes Registrar Office	✅	≡ ▾
Director	Michael Leonard	michael.leonard@g32598.com	COLLABORATOR	Default	✅	≡ ▾
SchoolCoordinator	Martin Lambert	martinlambert@g54375.com	COLLABORATOR	School Registration Office	✅	≡ ▾
SchoolRegistrar	Cleo Luna	cleoluna@h4378.org	SUBMITTER	School Registration Office	✅	≡ ▾
SportCoordinator	Norman Clements	normanclements@y4576547.com	COLLABORATOR	Sport Department	✅	≡ ▾
SportRegistrar	Raphael Webb	raphaelwebb@s54673.com	SUBMITTER	Sport Department	✅	≡ ▾

- **User Name.** the registered name of the user's account on the platform.

- **Full Name.** first name + last name.
- **Email Address.** the registered email of the user's account on the platform.
- **Role.** one of the three available options: Administrator, Collaborator, Submitter.
- **Unit Name.** the organizational structural unit in which the registered user is assigned.
- **Active.** active or deactivated user.
- **Actions.** a list of actions that can be applied by the administrator to the user's account.

3.1.4. General Search

This feature allows you to type any word and the list of the users will be filtered and updated instantly to show the users that meet exactly the search word.

3.1.5. Add New User

Click on the **+ sign** button at the lower right of the users' table.

A pop-up window will appear, there are three tabs called **User Details**, **User Roles**, and **User Unit**.

In the **User Details** tab, fill in the fields with suitable information about the new user such as Username, Name, Surname, Email Address, Password.

To make that user active, check the mentioned box. To make that user deactivated, uncheck that box.

Move to the second tab called **User Roles**, to determine if the new user will be:

- Administrator
- Collaborator
- Submitter

Simply, press the radio button beside the proper option.
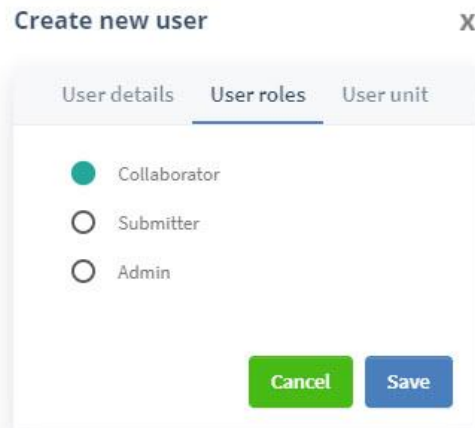
Move to the third and final tab called **User Unit** to assign that new user to one of the organizational structural units in your domain. Click on the name of the proper unit.
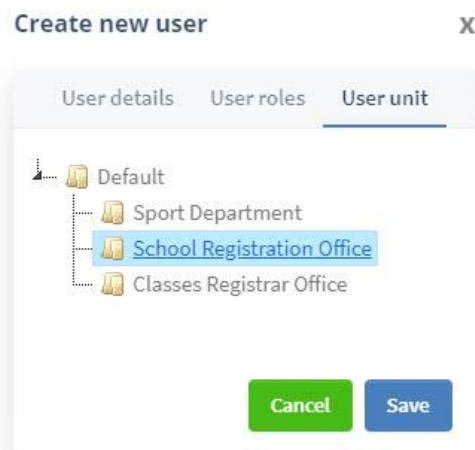
Finally, click on the **Save** button at the bottom right corner of the pop-up window.
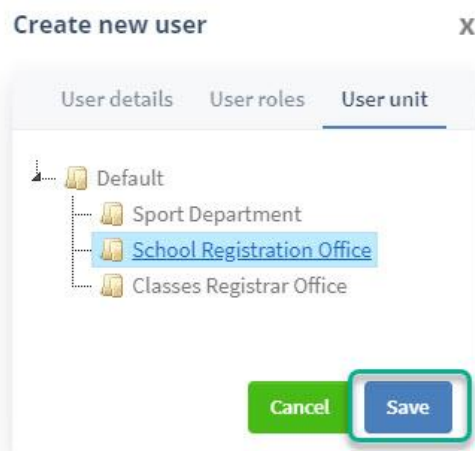
You notice that the new user has been added successfully to the domain.

User name	Full name	Email address	Role	Unit name	Active	Actions
Administrator	Eli Beckham	klopabraham@g32598.com	ADMIN	Default	✅	☰ ▾
ClassRegistrar	Louis Perkins	louisperkins@a45367.net	SUBMITTER	Classes Registrar Office	✅	☰ ▾
Director	Michael Leonard	michael.leonard@g32598.com	COLLABORATOR	Default	✅	☰ ▾
SchoolCoordinator	Martin Lambert	martinlambert@g54375.com	COLLABORATOR	School Registration Office	✅	☰ ▾
SchoolRegistrar	Cleo Luna	cleoluna@h4378.org	SUBMITTER	School Registration Office	✅	☰ ▾
SportCoordinator	Norman Clements	normanclements@y4576547.com	COLLABORATOR	Sport Department	✅	☰ ▾
SportRegistrar	Raphael Webb	raphaelwebb@s54673.com	SUBMITTER	Sport Department	✅	☰ ▾

3.1.6. The List of Actions

For the users registered as administrators, collaborators, or submitters, the list of actions includes the following common options:

- **Change Password.** to update the password of the user's account to a new password.
- **Edit.** to change the information of the user's account: Full Name, Email, Role, Unit, Status.
- **Forms Permissions.** to edit the permissions assigned to each user.
- **Delete.** to delete the user's account from the platform.

User name	Full name	Email address	Role	Unit name	Active	Actions
Administrator	Eli Beckham	klopabraham@g32598.com	ADMIN	Default		🔑 Change password
ClassRegistrar	Louis Perkins	louisperkins@a45367.net	SUBMITTER	Classes Registrar Office		✏️ Edit
Director	Michael Leonard	michael.leonard@g32598.com	COLLABORATOR	Default		🗐 Forms permissions
SchoolCoordinator	Martin Lambert	martinlambert@g54375.com	COLLABORATOR	School Registration Office		≔ Tracking sheet permissions
SchoolRegistrar	Cleo Luna	cleoluna@h4378.org	SUBMITTER	School Registration Office		🗑 Delete
SportCoordinator	Norman Clements	normanclements@y4576547.com	COLLABORATOR	Sport Department	✅	☰.▾
SportRegistrar	Raphael Webb	raphaelwebb@s54673.com	SUBMITTER	Sport Department	✅	☰ ▾

> *Note*
>
> For administrators and collaborators, there is an additional action called **Tracking Sheet Permissions** will be explained in a later section.

As an administrator, to change the password of one of the users, click on the Actions button of that user, in the last column of the users' table.

Select the option **Change Password**.

User name	Full name	Email address	Role	Unit name	Active	Actions
Administrator	Eli Beckham	klopabraham@g32598.com	ADMIN	Default		🔑 Change password
ClassRegistrar	Louis Perkins	louisperkins@a45367.net	SUBMITTER	Classes Registrar Office		✏️ Edit
Director	Michael Leonard	michael.leonard@g32598.com	COLLABORATOR	Default		🗐 Forms permissions
SchoolCoordinator	Martin Lambert	martinlambert@g54375.com	COLLABORATOR	School Registration Office		≔ Tracking sheet permissions
SchoolRegistrar	Cleo Luna	cleoluna@h4378.org	SUBMITTER	School Registration Office		🗑 Delete
SportCoordinator	Norman Clements	normanclements@y4576547.com	COLLABORATOR	Sport Department	✅	☰.▾
SportRegistrar	Raphael Webb	raphaelwebb@s54673.com	SUBMITTER	Sport Department	✅	☰ ▾

A window will pop-up asking you to enter the new password and to re-enter the new password for the confirmation. Insert the new password and then click on the button called **Change** to save the new password.

New password

Confirm password

Cancel   Change

To edit the information of the user, click on the Actions button of that user, and select the option **Edit**.

User name	Full name	Email address	Role	Unit name	Active	Actions
Administrator	Eli Beckham	klopabraham@g32598.com	ADMIN	Default		🔑 Change password
ClassRegistrar	Louis Perkins	louisperkins@a45367.net	SUBMITTER	Classes Registrar Office		✏️ Edit
Director	Michael Leonard	michael.leonard@g32598.com	COLLABORATOR	Default		🖼 Forms permissions
SchoolCoordinator	Martin Lambert	martinlambert@g54375.com	COLLABORATOR	School Registration Office		☰ Tracking sheet permissions
SchoolRegistrar	Cleo Luna	cleoluna@h4378.org	SUBMITTER	School Registration Office		🗑 Delete
SportCoordinator	Norman Clements	normanclements@y4576547.com	COLLABORATOR	Sport Department	✅	≡ ˅
SportRegistrar	Raphael Webb	raphaelwebb@s54673.com	SUBMITTER	Sport Department	✅	≡ ˅

A pop-up window with three tabs will appear.

From the first tab **User Details**, modify the basic information of the user such as Name, Surname, Email Address, Status: Active or Not.

Edit user   X

User details   User roles   User unit

User name

SportCoordinator

Name   Surname

Norman   Clements

Email address

normanclements@y4576547.com

✓ Active

Cancel   Save

From the second tab **User Roles**, edit the role of that user among the options:

- Administrator
- Collaborator
- Submitter

Edit user   X

User details   **User roles**   User unit

● Collaborator
○ Submitter
○ Administrator

Cancel   Save

From the third tab **User Unit**, change the unit in which the user is assigned.
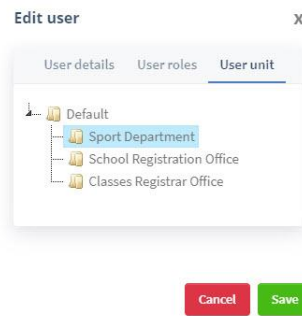
Finally, click on the **Save** button at the bottom right corner of the pop-up window.
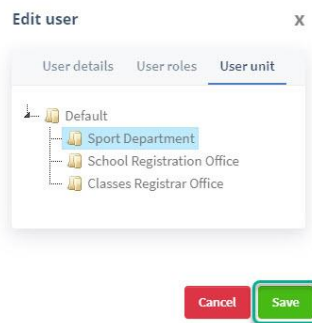
To change the permissions related to the forms for each user, simply, click on the Actions button of that user, and select the option **Forms Permissions**.

A new window will open in a new tab in the web browser, there will be a complete listing of the forms created in the current domain.

The available permissions for each form are:

- Edit
- Delete
- Submit
- View
- Approve/Reject
- Add comment

To add specific form permission to the user, just check the box related to that permission in the table as follows:

You can grant sub-permissions related to specific fields in the form, click on the **+ sign** beside the form's name.

Here, you can modify the permissions at the level of the fields of the form layout as follows:

After finishing the modifications, click on the **Save This Page** at the bottom of that table to save changes.

To delete a user account from the platform, click on the Actions button of that user, and select the option **Delete**.

From the pop-up window, click on **Yes** button to confirm the delete request.
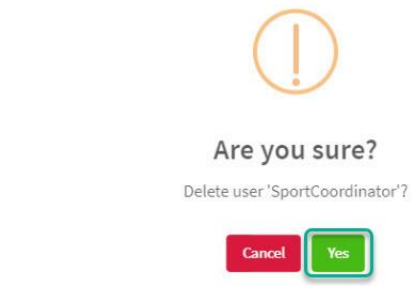
3.2. Units

Another powerful feature of Formera is the **Units** management tool. It is an advanced organizational structure builder that enables you to:

- **Sectorize** your company or organization into multiple sections and departments.
- **Assign** the registered users to the different sections or departments.
- **Manage** the general permissions effectively across the entire structure.

From the homepage of the platform, click on the tab called **Units** in the left side panel.
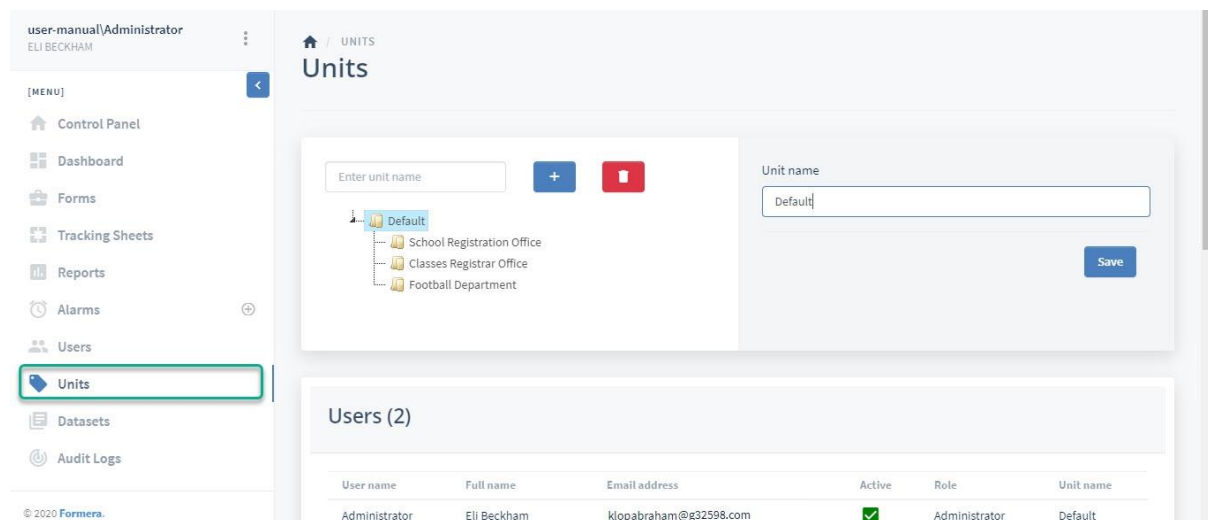
You will notice there are three different sections:

- **Units.** shows a complete structure of the created units in the current domain.
- **Users.** the table of the users who are assigned to the selected unit.
- **Forms.** the table of the permissions related to each one of the forms. Those permissions are applied to the selected unit.
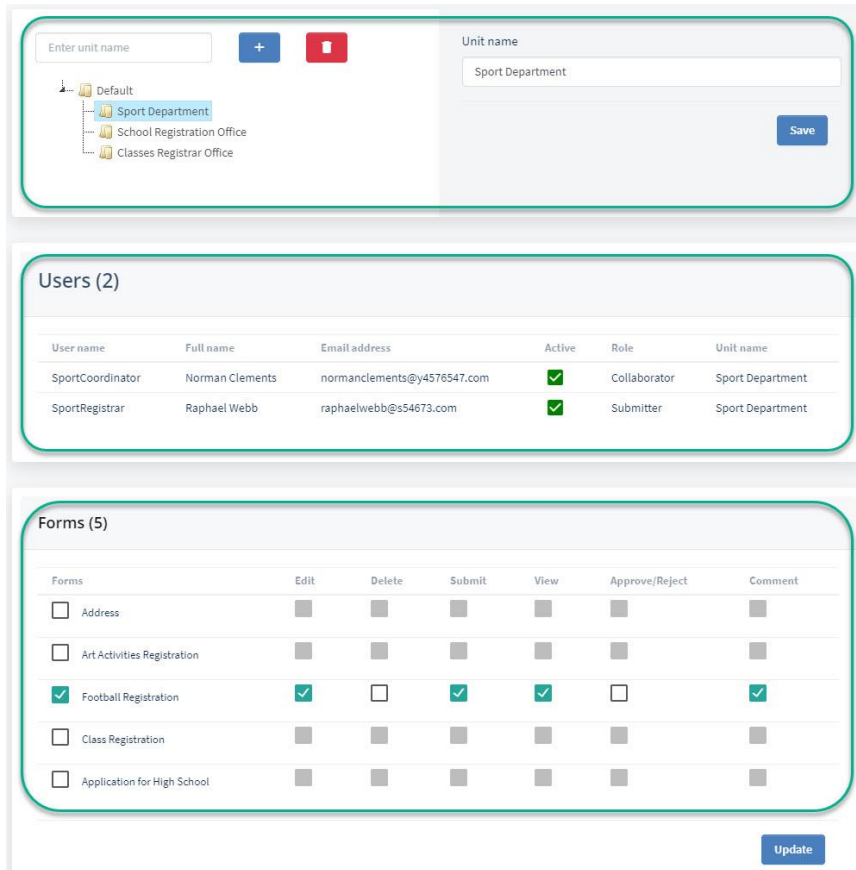
In every domain on the platform, there is a **Default** unit, and basically the administrator is assigned to that unit.

3.2.1. Add New Unit

From the first section called **Units**:

Select the unit called **Default**.
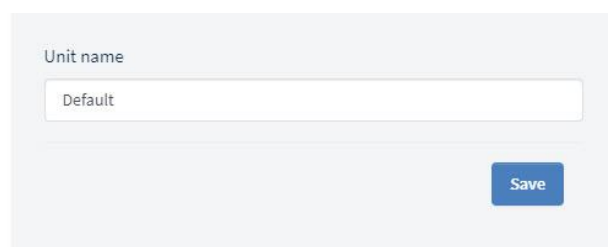
Enter the name of the new unit in the mentioned field.
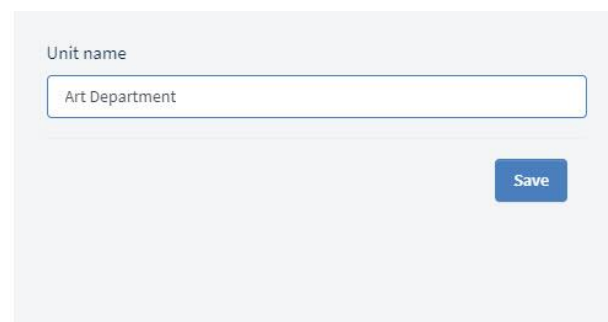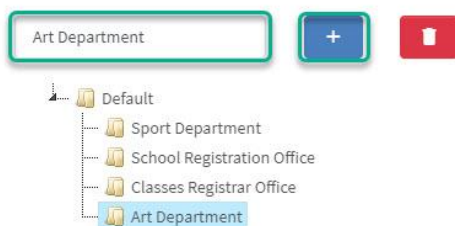
Click on the **+ sign** button.

You notice that the new unit has been created successfully inside the **Default** unit.
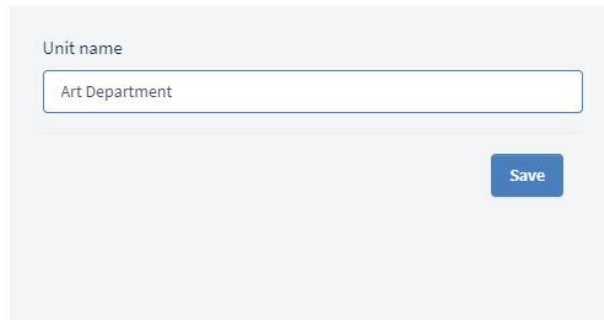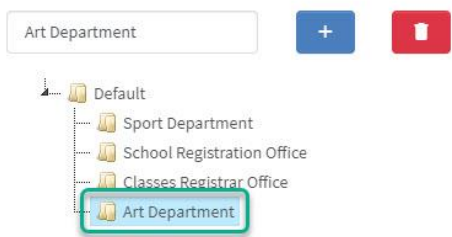
3.2.2. Rename A Unit

Simply, select the unit from the complete structure.
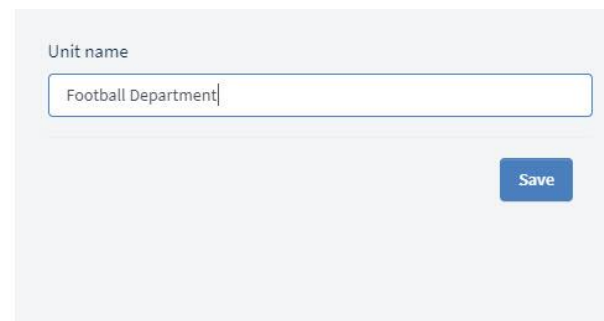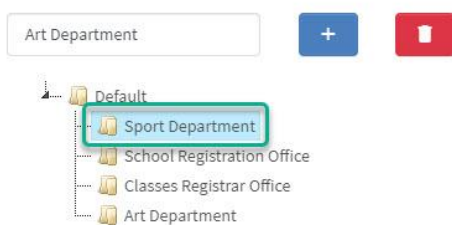
Enter the new name in the mentioned field.
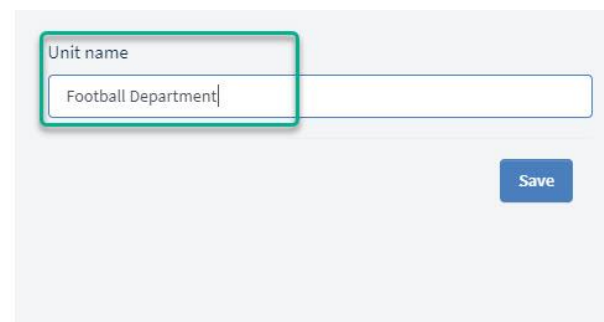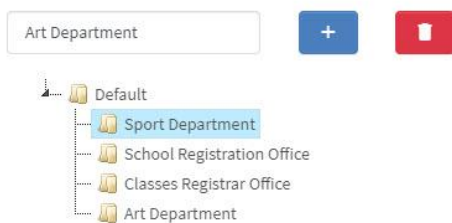
Click on the **Save** button.

You notice that the name of the unit has been changed.
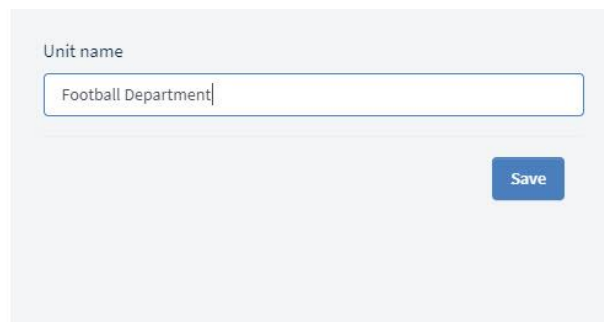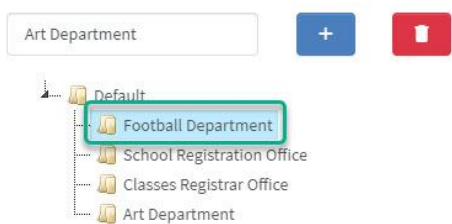
3.2.3. Delete A Unit

Select the unit from the complete structure.
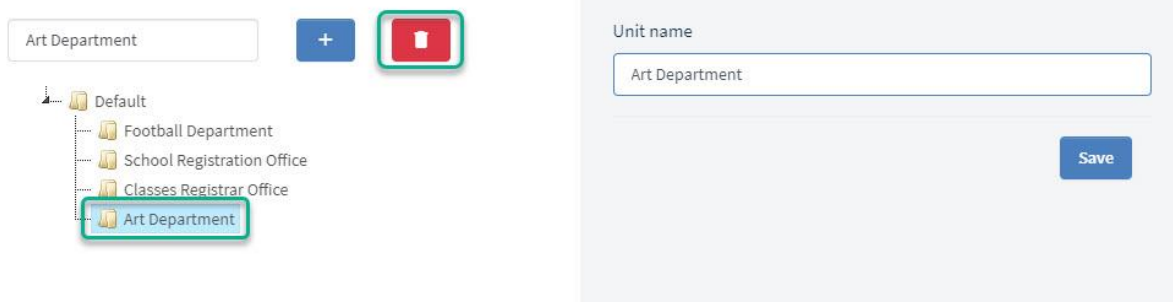
Click on the **Trash** button.

Click **Yes** in the pop-up window to confirm the delete request.
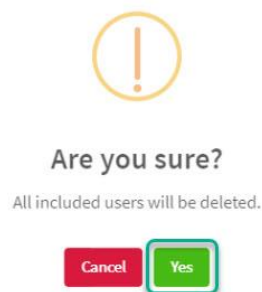
4. Data Collection

There are flexible and diversified solutions offered by Formera platform when it comes to the accomplishment of the **Data Collection** mission.

Basically, the supported methods of data collection are:

- **On Platform Submit**
- **Form Public Link**
- **Mobile App**

4.1. On Platform Submit

Click on the **Forms** tab on the left side of the platform's homepage.

You notice there is a complete list of all the forms that have been created in the current domain.

Click on the **Actions** button for one of the listed active forms.
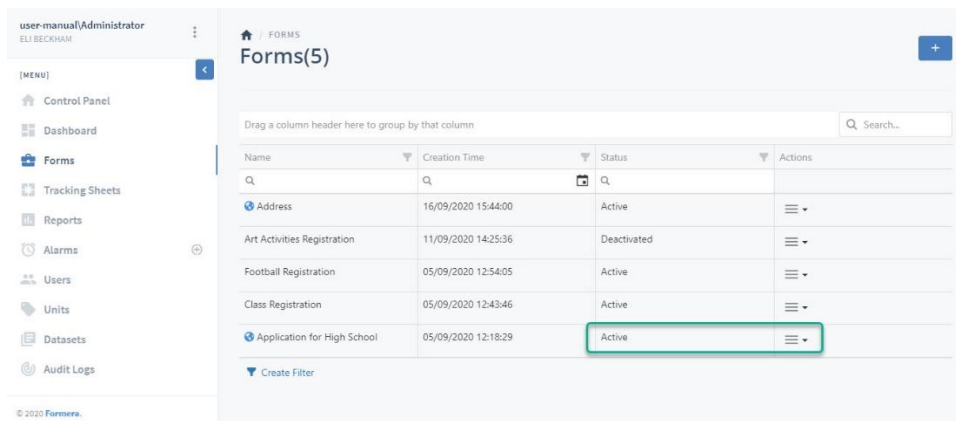
Click on the **Submit** option from the list of Actions.

A new window will appear to show you the form's fields.

Switch between the available languages to meet your need, click on the dropdown menu button as follows.

Select a suitable language among available options.

Fill in the fields of the form with proper information, then press the **Submit** button at the bottom.

Note

This kind of submitting **On Platform Submit** is available for all users with the Administrator role and the users with the Collaborator or Submitter role who firstly was granted permission to submit data via that form.

4.2. Form Public Link

When you publish a previously designated form as **Public** (in the form builder window), a tiny **globe sign** will appear beside the name of the form in the table of the created forms.

The form builder window, where you can assign the form as **Public**.

From the table of the created forms, click on the tiny **globe sign** beside the name of the published form.

A message will appear immediately at the lower right corner, confirming that the public link of the form has been copied to the clipboard.

Paste that link in the **URL field** in the internet browser, then press **Enter**.

A new webpage will be loaded containing the form. Switch between the available languages to meet your need, click on the dropdown menu button as follows.
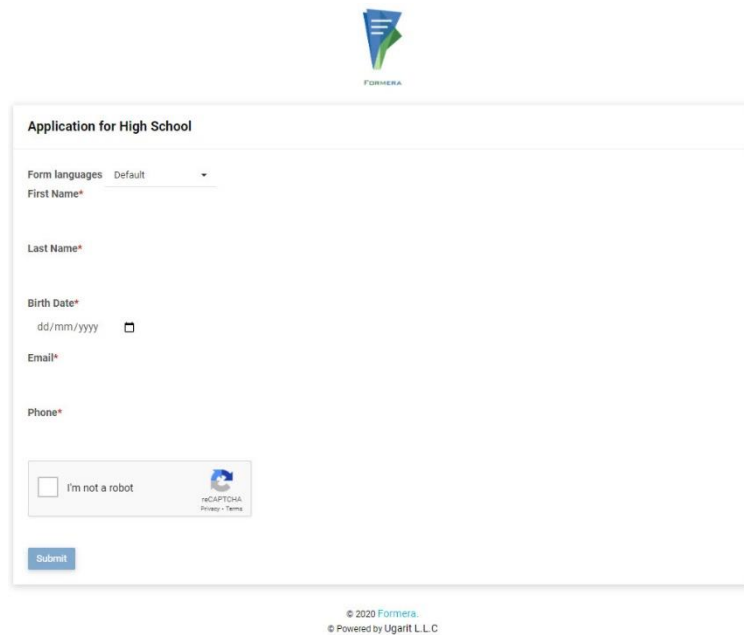
Select a suitable language among available options.
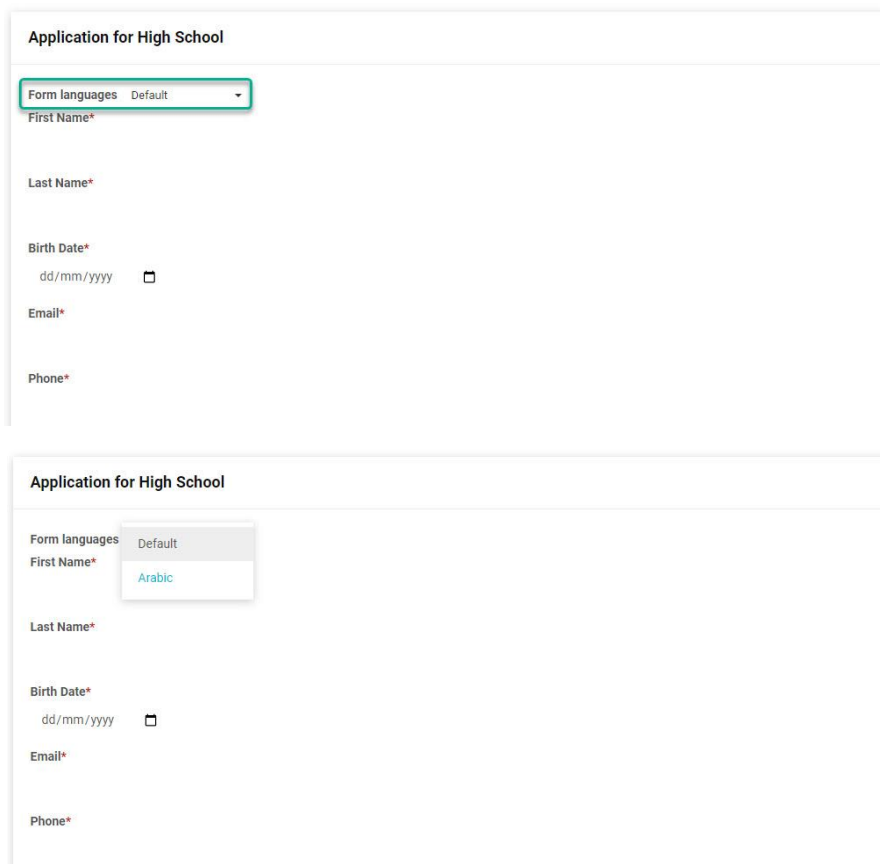
Fill in the fields of the form with proper information, then check the box of **reCAPTCHA**.

Finally, press the **Submit** button at the bottom.

A message will appear to confirm that data have been submitted successfully, and to offer you an option to make another submission.

4.3. Mobile App

When you sign in to your account from the mobile app of Formera, you notice the list of the forms appears on the main screen, tap on one of the forms, for example, the form called Application for High School, as follows.
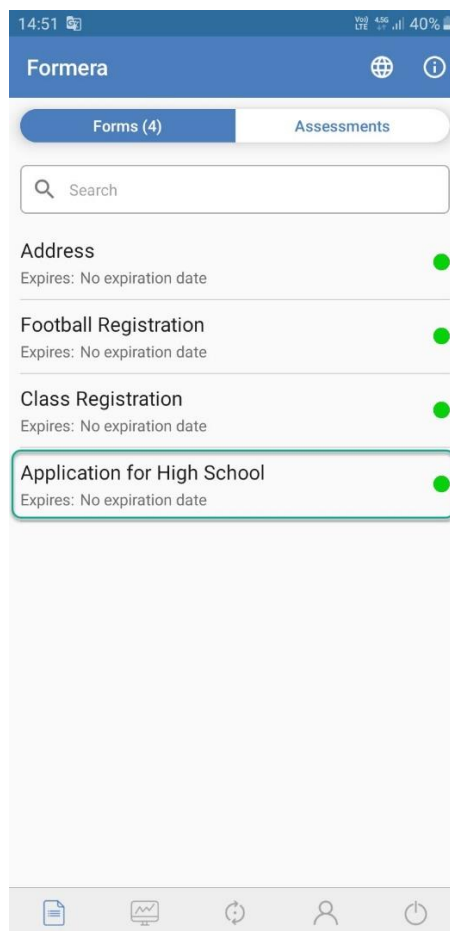
A new screen will appear to show you the form's fields.

Switch between the available languages to meet your need, tap on the dropdown menu button as follows.

Select a suitable language among available options.

Fill in the fields of the form with proper information, then press the **Save** button.

A message with three options appears:

- **Yes, Send Submission.** if there is an internet connection and you would like to send the submission now.
- **Continue Editing Submission.** if you want to edit the inserted information in the fields of the form.
- **Save Submission in Local Storage.** if there is no internet connection, you can fill in the fields offline and store the data locally in your mobile storage, and when you are online again the submission will be sent synchronically to the platform.

Finally, if there is an internet connection as follows.

Just tap on the first option **Yes Send Submission** and the submit will be accomplished immediately.

> ***Note***
> This kind of submitting, **Mobile App**, is available for all users with the Administrator role and the users with the Collaborator or Submitter role who firstly was granted permission to submit data via that form.

5. Data Management

From the homepage, click on the tab called **Forms** on the left side panel. You will notice there is a complete list of all the forms that have been created in the current domain.

To access the data of the submissions related to one of the listed forms:

- Click on the **Actions** button of that form.
- Click on the option called **Submissions**.

> **Note**
>
> By default, the data shown in the table are the recently submitted data or the modified submissions during the last 24 hours.
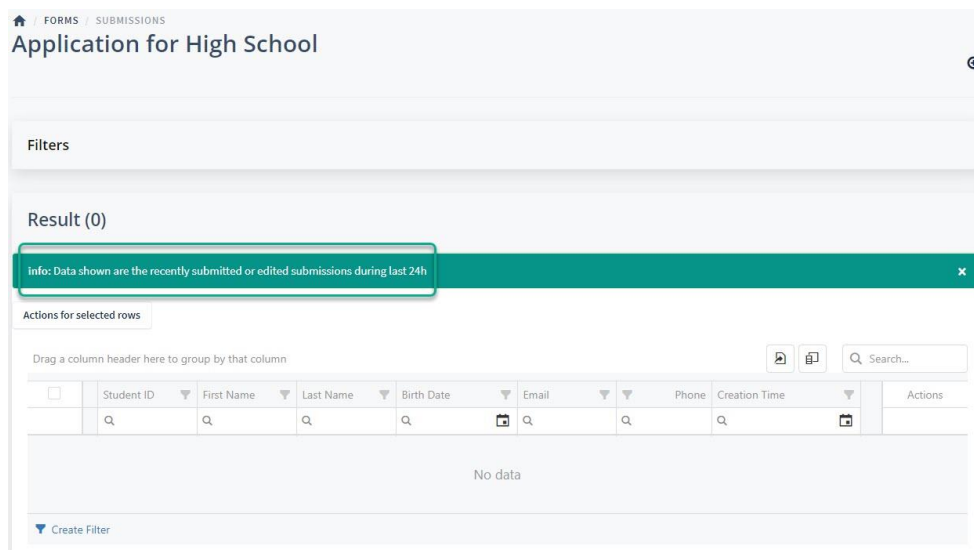
To show the whole submissions data, click on **Filters**, then click on **Search** button without entering any parameter in the **Filters** fields.
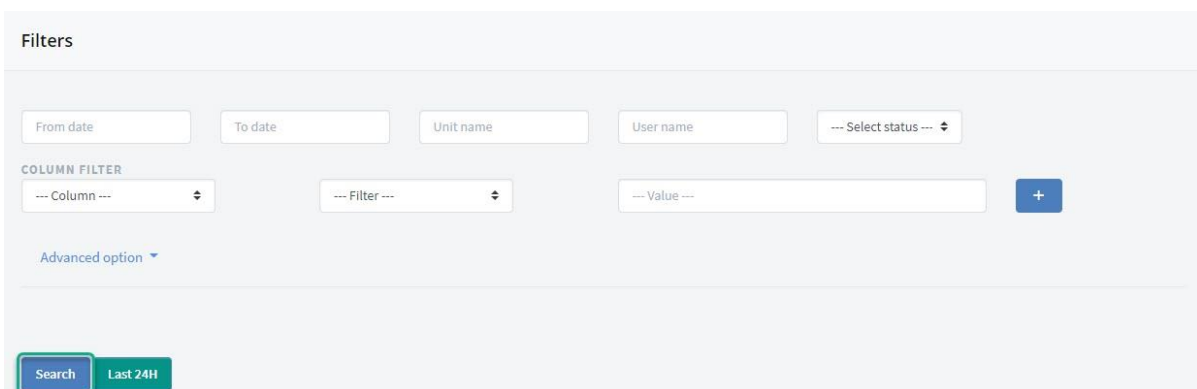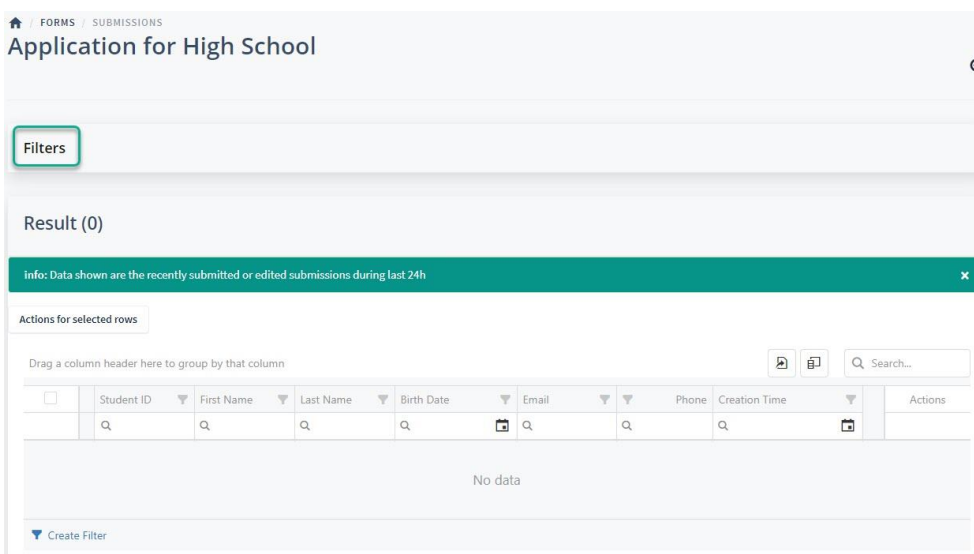
A complete table of all submissions related to the form will appear. Here you can manage easily all the data of submissions.

You are able to:

- Search
- Filter
- Sort
- Organize in groups
- Arrange columns
- Export data

The column headers of the submissions table are identical to the titles of the form's fields that have been selected as "**Show in Grid**" fields.

There is an additional column called **Actions** contains a button for a list of options and actions that can be applied to the submission.

Formera platform applies an advanced approach to manage the listed data of submissions. The approach includes comprehensive search and filtering options, data grouping options, customized tables, and complex logical filters.

1. **General Search.**
   This feature allows you to type any word and the table of the submissions will be filtered and updated instantly to show the submissions data that meet exactly the search word.
2. **Column Search.**
   The search feature can be also applied to each one of the columns of the table to find the results according to the matching criteria.

3. **Data Grouping.**
   To group your data, simply, drag a column header and drop it in the area above the forms table, and the data will be grouped according to that column.

4. **Column Chooser.**
   This button is used to determine the columns that you want to show in the table.
   To hide a column from the table of the listed data, just drag a column header and drop it in the area appears when you click on the Column Chooser button.
   To add a new column to the table of the listed data, just drag a column header from the area that appears when you click on the Column Chooser button and drop it in the data table.
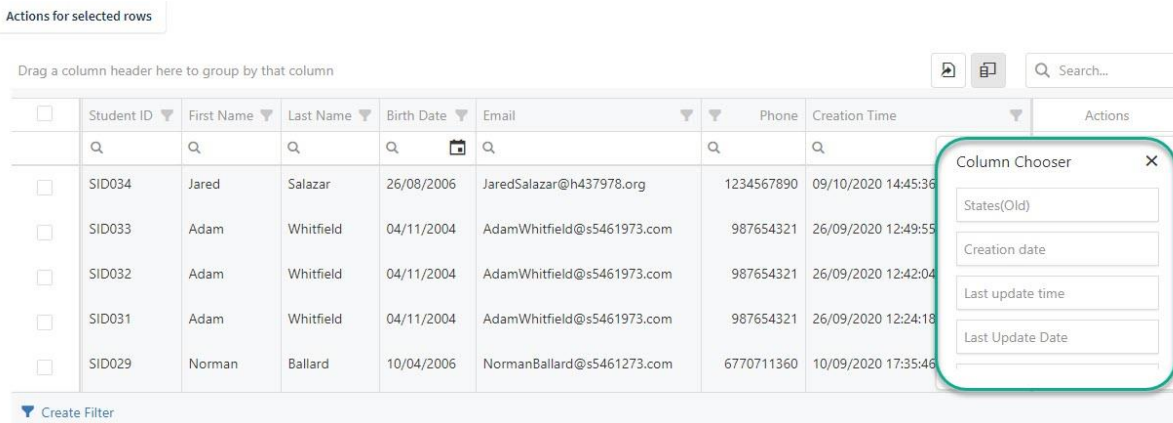
5. **Export Button.**
   This button is used to export the data of the submissions table as an excel file.
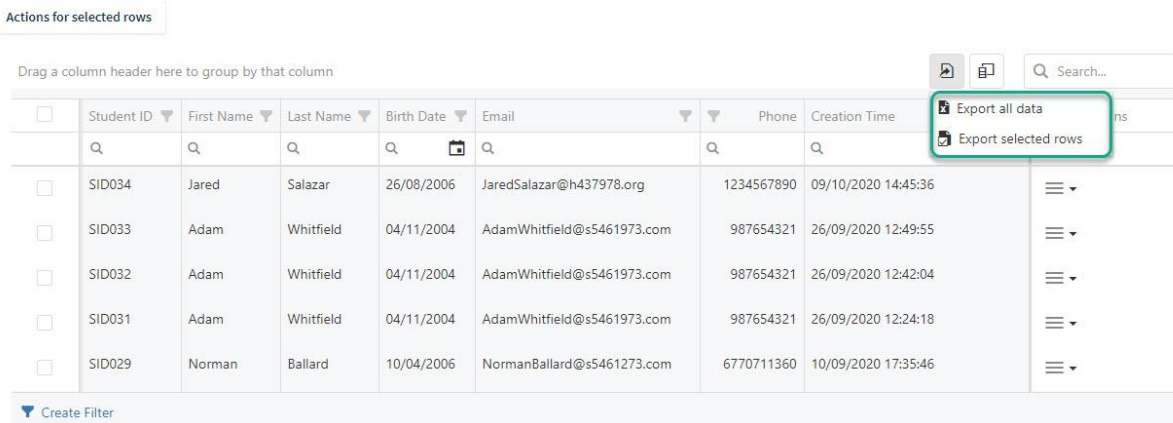
6. **Create Filter.**
   Click the Create Filter button below the table of the datasets, to build your own complex filter.

7. **Actions for Selected Rows.**
   This button is to show a list of actions that can be applied to a group of selected submissions. The available actions are:
   - Approve
   - Reject
   - Change Unit
   - Submitter Location

5.1. Search

Formera search capabilities are so friendly and easy to use. Users can find the right data they search for within seconds.

The **Search** feature allows you to type any word and the list of the submissions will be filtered and updated instantly to show the submissions that meet exactly the search word.

The **Search** feature can be also applied to each one of the columns of the table to find the results according to the matching criteria.

5.2. Data Grouping

You can group your data depending on a specific column, so the data search will be more organized.

To group your data, simply, drag a column header and drop it in the area above the submissions table, and the data will be grouped according to that column.

5.3. Actions

With the multiple options provided by the **Actions** button, data management will be an easy mission.

Basically, the options of the **Actions** list are:

- **Edit.** to modify the data of the submission.
- **Change Unit.** to change the unit of the submission.
- **View.** to show the data & metadata of the submission and to add comments.
- **Approve.** to accept the submitted data.
- **Reject.** to refuse the submission.
- **Delete.** to remove the submission data.

When you choose the option **Edit**, a pop-up window will appear to show you the submitted data in the fields of the form layout. Here you can modify the data and then click on the **Save** button to store the changes.

When you choose the option **Change Unit**, a pop-up window will appear to show you the complete hierarchy of the organizational units in the current domain. Here you can modify the submission unit and then click on the **Save** button to save the change.

When you choose the option **View**, a pop-up window will appear to show you plenty of information about:

- **The Form:** form name, creation date and time, status, expiry.
- **The Submission:** data submitted through the form's fields.
- **Metadata:** submission status, user name, submission date and time, last update, the user who updated, unit.
- **Child Forms:** the list of the child forms, number of the submissions via child forms, + sign button to add a new submission through the child form.

There is an additional section called **Comments** at the bottom of that pop-up window. Here the user can add comments to the submission so the cooperation between team members will be more efficient and more effective.

When you choose the option **Approve**, the status of the submission will be changed to **Approved**, and the option of **Approve** will disappear from the **Actions** list.

When you choose the option **Reject**, the status of the submission will be changed to **Rejected**, and the option of **Reject** will disappear from the **Actions** list.

5.4. Data Filtering

Formera platform provides you with multiple built-in filtering options.

- **Simple Filters**
- **Advanced Filters**
- **Complex Filters**

5.4.1. Simple Filters

- **Date Filter**
  On the submissions page, you can also choose to display only the entries collected and submitted within a specific date range.
  Simply, pick two different dates from the calendars **number 1** and click the Search button **number 2**.

- **Basic Information Filter**
  Here, you can filter based on:
    - Unit Name
    - User Name
    - Status: Pending, Approved or Rejected.
  Simply, select the suitable information from the three fields **number 1** and click the Search button **number 2**.

5.4.2. Advanced Filters

- **Column Filter**
    1. Select the name of the column header.
    2. Choose the filter type: is equal, greater, smaller, ... etc.
    3. Determine the value.
    4. Click on the + sign button to add the filter.
    5. Click on the Search button to start filtering the data table.

- **Advanced Option (Aggregation by Child Form)**
  This filtering option returns the number of the child forms for each submission. It provides you with the information related to the child forms, so you will know for each parent form how many child forms linked with it.
    1. Select the child form.
    2. Choose the start date.
    3. Choose the end date.
    4. Click on the + sign button to add the filter.
    5. Click on the Search button to start filtering the data table.

Note

You will gain access to the data of child forms too.

5.4.3. Complex Filters

To build your own customized logical filter, click on the **Create Filter** button located below the table of the submissions.
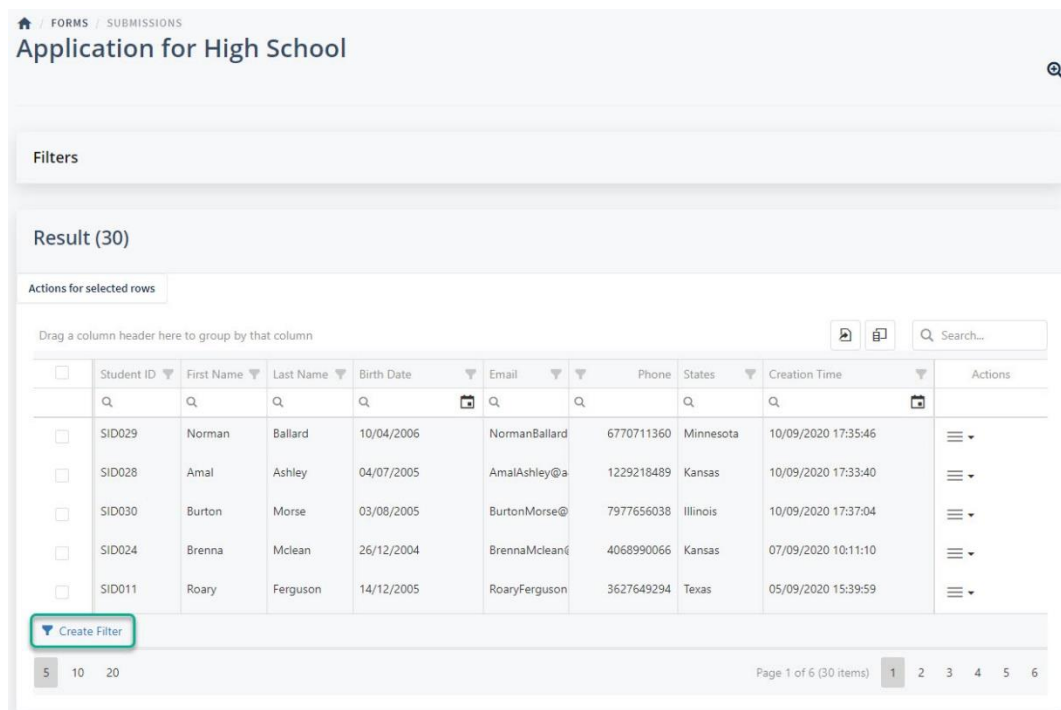
With complex filters, you will be able to build and create whatever scenario you want to completely control the data of the submissions with high flexibility.

Basically, complex filters are build depending on four main logical functions:

- And
- Or
- Not And
- Not Or

The conditions identified inside each filter are built based on a wide collection of functions, such as:

- Contains
- Not contain
- Starts with
- Ends with
- Equals
- Does not equal
- Is blank
- Is not blank
- Is any of
- Is none of
- Equals
- Does not equal
- Is less than
- Is greater than
- Is less than or equal to
- Is greater than or equal to
- Is between

Note

The suggested functions in each condition depend on the data type of the selected column header (text, number, date, ...etc).

To build a complex filter:

1. Select one of the logical functions to start your filter with it:
   - And
   - Or
   - Not And
   - Not Or

2. Click on the **+ sign** button.

3. Choose between the two options: **Add Condition, Add Group**.

4. If you choose **Add Condition**, three fields will appear:
    - **First field.** to choose the name of the column header.
    - **Second field.** to select the condition function.
    - **Third field.** to determine the value of the condition.

Example

Note
-   You can add one condition or set of conditions at the same level.
-   The suggested condition functions differ depending on the data type of the column header (text, number, date, ...etc).

5. If you choose **Add Group**, you will be able to build nested condition statements contained within the definition of other condition statements.

6. After finishing the construction of the new filter, click on the **OK** button, the filter will be added and it will be applied immediately on the table of the submissions.

5.5. Data Management by Collaborator

Essentially, the options offered to collaborators to manage the submissions data, depend on the permissions granted by the administrator to each one of the collaborators.

For example, the collaborator who is granted permissions according to the following table will be able to view only the two forms: **Application for High School** form and **Class Registration** form.
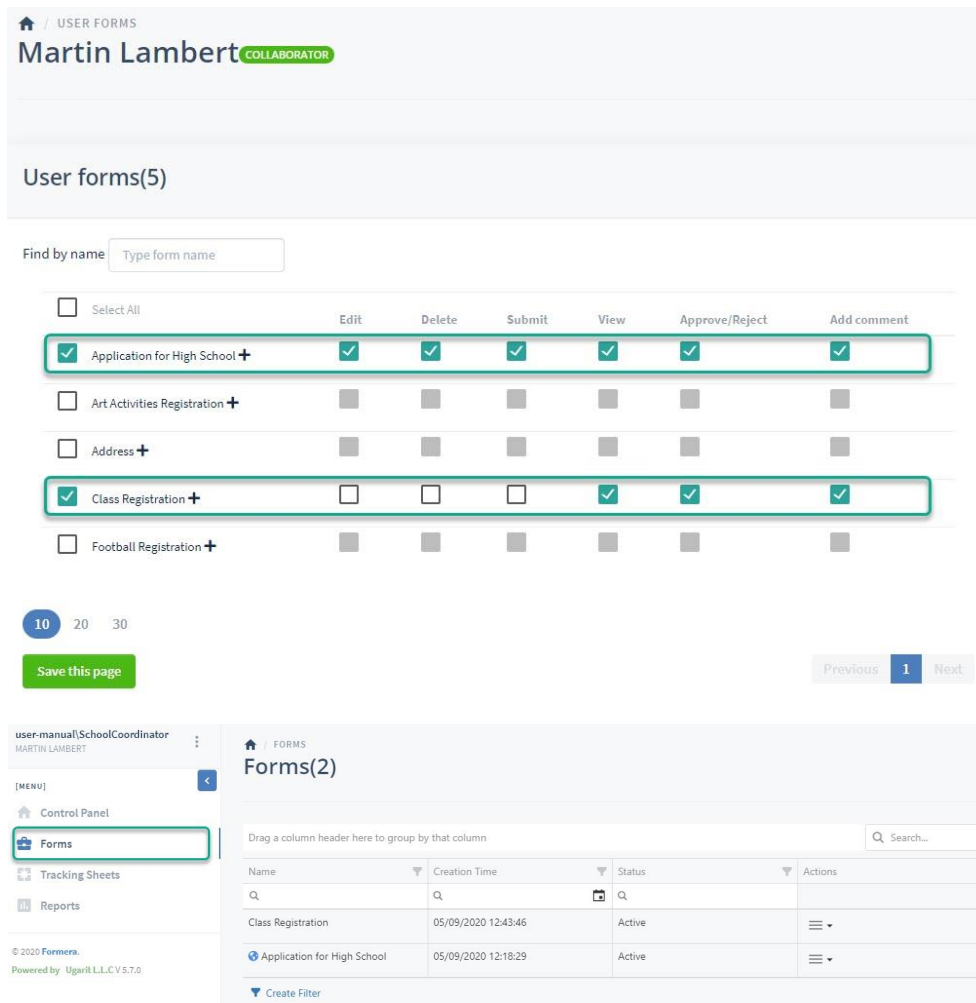
Additionally, that collaborator will be able to choose between those options:

- Edit
- Change Unit
- View
- Approve
- Reject
- Delete

to manage the data of the submissions of the **Application for High School** form.
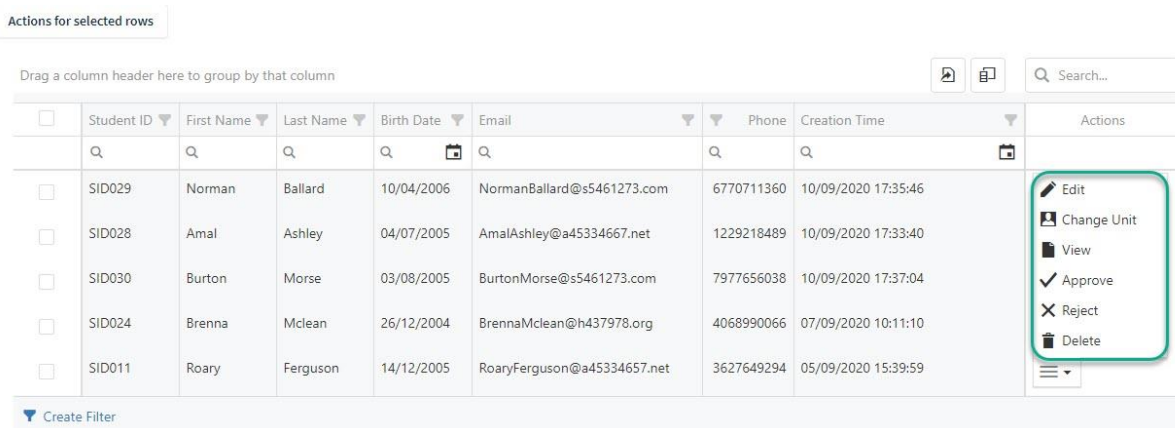
But for the **Class Registration** form, the collaborator will be able only to:

- View
- Approve
- Reject

6. Control Panel

Formera provides its users with an advanced control panel empowered by comprehensive search and filtering capabilities and by regularly updated listing of all activities related to the created forms.

From the homepage, click on the tab called **Control Panel** on the left side. You will notice there are four main sections on the **Control Panel** page.

1. **Time Frame Chooser.** to select the time range in which you would like to show submissions, you can choose among the offered options:

- Last 12 hours
- Last 24 hours
- Last week
- Last month
- Last 3 months

2. **Last Update Time.** date and time information of the last data update.
3. **Basic Statistics Bar.** shows information about the number of:
   - Total Submissions
   - Approved Submissions
   - Rejected Submissions
   - Comments,

   throughout all the forms created in the current domain.
4. **Submissions Table.** provides crucial information about each one of the submissions, including:
   - Submitter Name. the name of the user who submitted the data.
   - Form Name. the name of the form in which the data have been submitted.
   - Submission Date. the date of data submission.
   - Last Update. the date of the last update applied to the submission.
   - Last Status. the last submission status: Pending, Approved, or Rejected.
   - Comments Count. the number of comments added to the submission.
   - Last Action User. the name of the user who made the last action to the submission.
   - Unit. the name of the organizational structural unit in which the submission has been made.
   - Actions Button. includes the options that can be applied to the submission: View, Approve and Reject.

You can search and filter the listed data depending on multiple options such as **Submitter Name**, **Form Name**, **Last Status**, **Last Action User**, **Unit Name**.

When you click on **Total**, the table of submissions will be updated instantly to show the latest updates about all kinds of submissions.

When you click on **Approved**, the table shows you only the approved submissions.

When you click on **Rejected**, the table shows you only the rejected submissions.

When you click on **Comments**, the table shows you only the submissions that have comments added to them.

Basically, in the **Actions List,** there are three main options that can be applied to the submission:

- **View**
- **Approve**
- **Reject**

When you choose the option **View**, a pop-up window will appear to show you plenty of information about:

- **The Form:** form name, creation date and time, status, expiry.
- **The Submission:** data submitted through the form's fields.
- **Metadata:** submission status, user name, submission date and time, last update, the user who updated, unit.
- **Child Forms:** the list of the child forms, number of the submissions via child forms, + sign button to add a new submission through the child form.

There is an additional section called **Comments** at the bottom of that pop-up window. Here the user can add comments to the submission so the cooperation between team members will be more efficient and more effective.

When you choose the option **Approve**, the status of the submission will be changed to **Approved**, and when you choose the option **Reject**, the status of the submission will be changed to **Rejected**.

> ### *Note*
> All the above explanations are basically for users with the **Administrator** role. For collaborators, the features of the **Control Panel** are similar to those of the administrator case, but the **Collaborator** will gain access only to the submissions data depending on the permissions granted by the administrator.

For example, a collaborator signed in to the platform, and he has been granted permission to access only the Application for High School form, the control panel looks like as follows.

7. Reports

The powerful reporting capabilities of Formera, make it the best and most preferable platform to accomplish the tasks of data analysis in the most effective and efficient visually attractive manner.

7.1. Reporting Methods

Basically, there are four main reporting types available on Formera platform.

7.1.1. Data Report

This type of report is built based on the submissions data of the forms. The form's fields appear as table columns in the generated report.

You can generate reports that contain all the fields of the form or contain only a selected subset of those fields, you can also apply whatever you want of the advanced filters and aggregations that allow you fully customize the resulted reports.

7.1.2. Duplicate Report

Generally, submissions might contain duplicated data, so in order to obtain clean and highly reliable data for statistical analysis, you have to use this kind of reporting.

Duplicate reports are used to discover duplicated data in the submissions of the form based on criteria determined by the user.

7.1.3. Top-Down Report

This type of report is also called the Parent-Child report because it is essentially built based on one parent form and a subset of its child forms.

The generated report illustrates the relationship between the number of submissions of the child form with each one of the submissions of the parent form. Reported data can be aggregated depending on a daily or monthly basis.

7.1.4. Beneficiary Status Report

This reporting method works based on one beneficiary form and its own child forms.

The report explains the status of each submission of the beneficiary form according to the combined count of the submissions of the selected child forms.
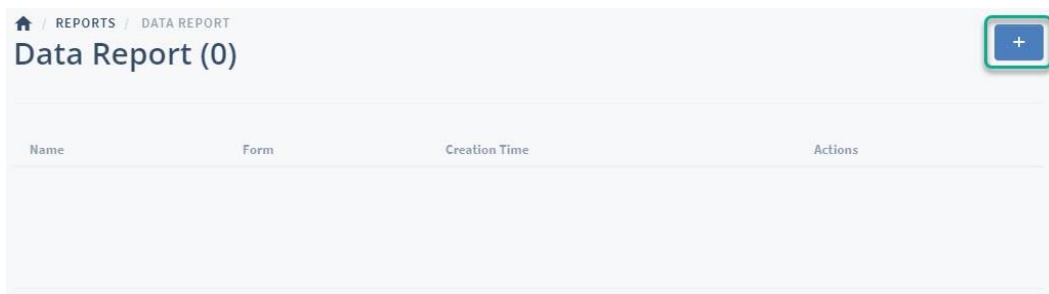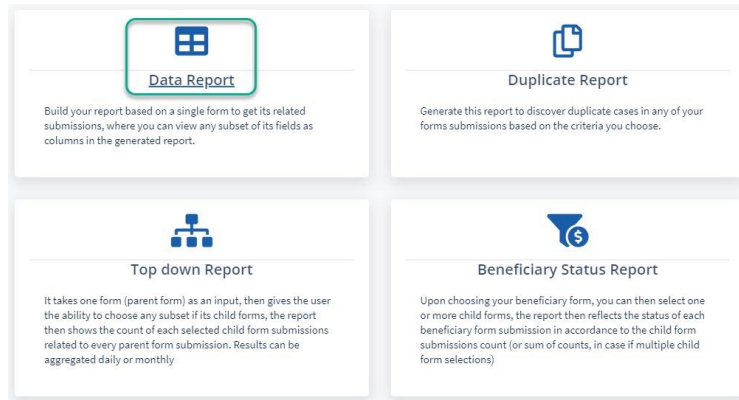
7.2. Create Report

From the homepage of the platform, click on the tab called **Reports** on the left side. You will notice the four reports types appear on the **Reports** page, as follows.
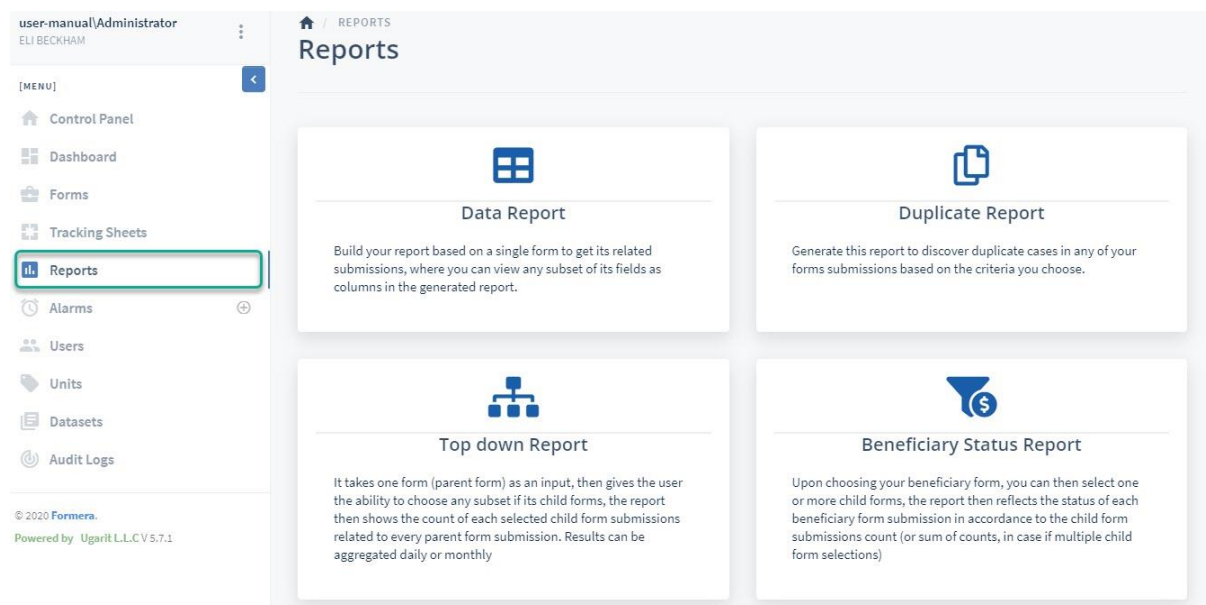
Click on the type of report you would like to create, for example, **Data Report**.

A new page appears, click on the **+ sign** button at the upper right corner.
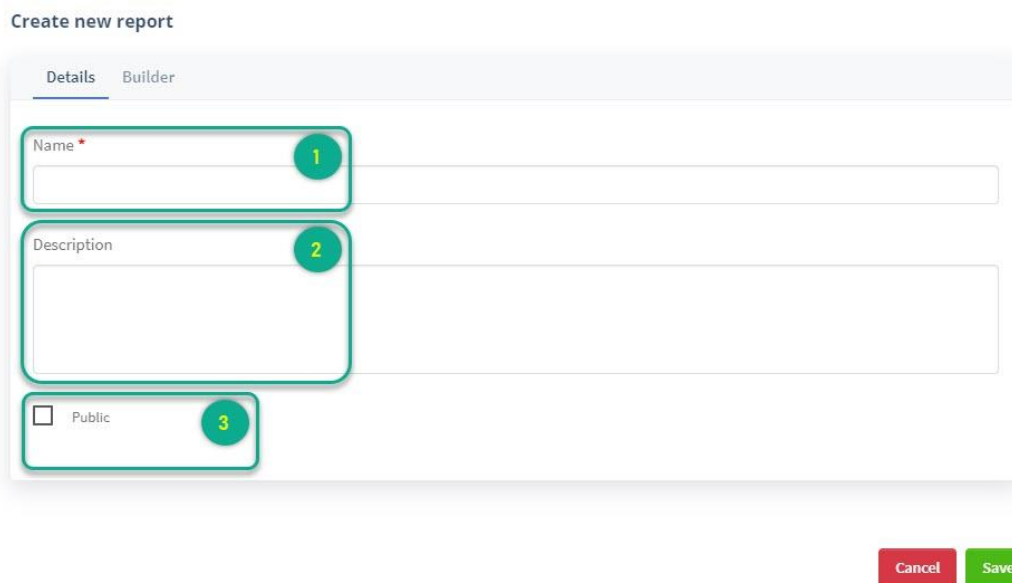
A window will pop-up, there are two tabs:

- **Details**
- **Builder**

In the **Details** tab.

1. You have to type a name for that report.
2. Add a description (optional).
3. Choose to make the report public or not.

After you type a suitable name for your report and choose to make the report public for example, go to the second tab called **Builder**.

> **Note**
> When you check the box to make the report public, a random code will be generated, and there will be a new option called View.

In the **Builder** tab.

There are three main sections:

1. Choose one of the forms and select the desired fields to be reported.
2. Create filters and apply them to the reported data.
3. Create suitable aggregations then add them to your report.

To select one of the forms and to add the desired fields:
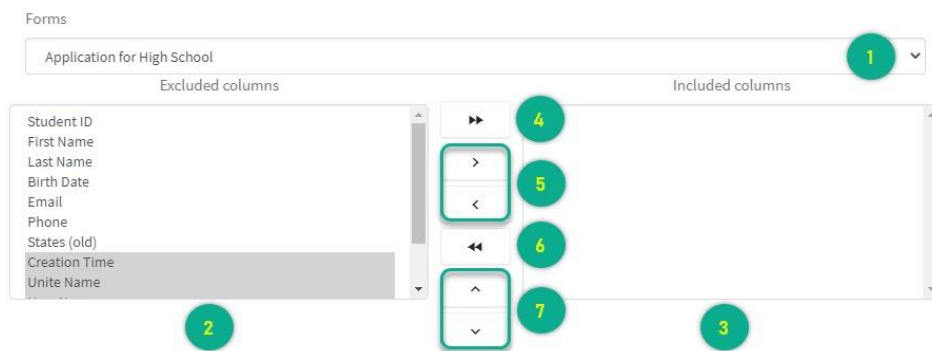
1. **Dropdown menu.** to choose the form.
2. **Excluded columns.** the form's fields which are not added to the report.
3. **Included columns.** the form's fields that are added to the report.
4. **Add All button.** to select all the fields listed in Excluded columns and add them to Included columns.
5. **Add & Remove buttons.** to add to the report or to remove from the report one selected field or group of selected fields.
6. **Remove All button.** to select all the fields listed in Included columns and return them to Excluded columns.
7. **Sorting buttons.** to sort and order the added fields in Included columns

After adding the desired fields to the report, and creating the suitable filters and aggregations depending on your data and the purpose of the reporting, click on the **Save** button at the lower right corner to save the report.
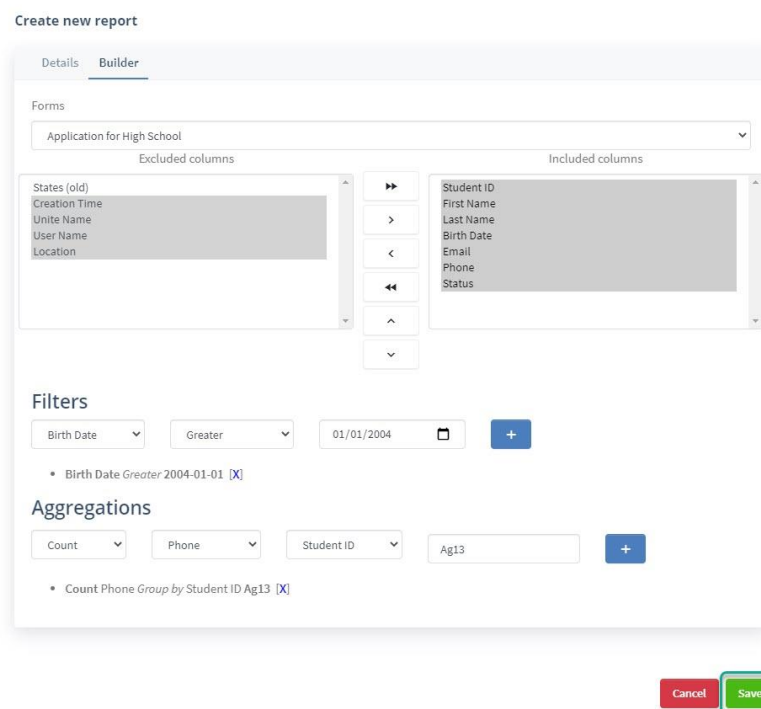
> ### *Note*
> The report builder structure differs depending on the reporting type you choose.