REKA / LEAP

Creator Basic Guides

REKA / LEAP-based Platform

List of Contents

Login and Creator Profile

Log In to REKA Platform

1. Navigate to **https://create.<platform-base-url> /**.
2. Select a login option and click it.
3. Complete the login process with your chosen provider.
4. Once successful, you will be redirected to the **Creator Home** page.

Manual Signup

1. Navigate to **https://create.<platform-base-url>/**.
2. Click on the **[...]** button.
3. Select **Sign Up** under the **Email and Password** option.
4. In the **Sign Up form**, enter the following details:
    - **Name**: User full name
    - **Email**: User email address
    - **Password**: User password

      Once completed, click the **Sign Up** button.
5. Upon successful registration, a confirmation message will appear:
   "User registered successfully".

Tip

- Use a valid email address that you can access, as it may be required for verification or password recovery.

Login Using Manual Account

1. Navigate to **https://create.<platform-base-url>/**.
2. Click on the **[...]** button.
3. In the **Login form**, enter your:
    - **Email**
    - **Password**

      Then, click the **Log In** button.
4. Upon successful login, you will be redirected to the **Creator Home** page.

Log Out from REKA Platform

1. Click the **Creator Profile** link at the top-right corner of the **Creator Home** page.
2. On the **Creator Profile** page, click the **Logout** button (red).
3. You will be redirected to the landing page after a successful logout.

Remove Creator Profile

1. Click the **Creator Profile** link at the top-right corner of the **Creator Home** page.
2. On the **Creator Profile** page, click the **Remove My Account** button.
3. You will be logged out and redirected to the landing page.

App Design

Create a New App

1. Click on **Create New App > Blank (Create from Scratch)** tile
2. In the **App Properties** modal dialog, fill in the **App Title**
3. Select your preferred **App Layout** in *Choose Layout*
4. Ensure the **App Path** is available. If not, edit the path to use an available one

   ⚠ **Warning:** Each app must have a unique path. If the chosen path conflicts with an existing app, your new app may not be accessible. Always double-check the availability before proceeding.
5. Select the **Sign-In Options** for your app
6. If your app is a **Satellite App**, select the main app under *Use local user from other app*
7. In the **Advanced Tab**, configure or set the following options:

Setting	Description
App Status	Define whether the app is Local, Published or set as Template
App Behaviour Settings	Adjust specific behaviour rules for the app
One-off Screen	Set a one-time display screen if required (ie: PDPA notice)
Privacy Policy Link	Provide the URL to your app's privacy policy
Forward Domain	Set a custom domain for your app
Default Language	Choose between *Bahasa Melayu* or *English*
Custom Menu Style (CSS)	Add custom CSS for app menu styling
App Welcome Text	Text displayed on the login page
App Group	Group your app within the **My Apps** page for easier organization

8. You can also switch the **App Status** between *Dev* and *Live* at the top-right corner of the dialog
9. Once all settings are completed, click **Create App**
10. You will be redirected to the **App Designer** page

Note

- You can update these settings later by clicking on the **App Properties** button on the app tile or within the designer page.

Tip

- For best practice, keep your app in **Dev Mode** until it is fully tested and ready for users.

Edit Existing App Properties

1. Navigate to the **Creator Home** page.
2. Hover over the **App Tile** of the application you wish to modify, then click the **Edit Properties** button
3. In the **App Properties** dialog, update the desired properties.
4. Once all changes are complete, click the **Save App** to apply the updates.

💡 **Tips**

- **Double-Check Before Saving**: Review all fields carefully before clicking 💾 **Save App**, as changes will overwrite the existing app configuration.

Remove an Existing App

1. Navigate to the **Creator Home** page.
2. Hover over the **App Tile** of the application you wish to remove, then click the 🗑 **Remove App** button.
3. In the **Remove App** dialog, click the 🗑 **Remove App** button again to confirm the removal.

⌛ The removal process may take some time, as the system ensures that all related data is fully deleted.

⚠ **Warning**

- This action is **irreversible**. Once removed, the application and its associated data cannot be restored.
- If there is **more than one creator** assigned to the application, removing it will only remove *your creator email* from the app's creator list. In such cases, the app itself will remain accessible to the other creators.

💡 **Tips**

- **Verify Before Removal**: Double-check the app name and details to ensure you are removing the correct application.
- **Notify Co-Creators**: If multiple creators are associated with the app, inform them before proceeding with removal to avoid confusion.
- **Backup Important Data**: Export or save any essential data before removing the app, as the process is permanent and cannot be undone.

Clone / Copy an Existing App

1. Navigate to the **Creator Home** page.
2. Hover over the **tile** of the application you wish to copy, then click the ⧉ **Copy App** button.
3. In the **App Properties** dialog, provide the new details for the copied app.
4. Ensure that a unique **App Path** is set for the new app.
5. Once all details are complete, click the 💾 **Save App** button.
6. Upon successful completion, you will be redirected to the **Design Page** of the newly copied application.

💡 **Tips**

- **Unique App Path**: Always set a unique App Path to avoid conflicts with the original app.
- **Update App Name**: Use a clear and descriptive name for the copied app to distinguish it from the original.
- **Review Properties**: Double-check configuration settings in the **App Properties** dialog before saving to prevent duplicating unwanted settings.

⚠ **Warning**

- Cloning an app duplicates its structure and configuration but does **not** automatically transfer ownership or linked external resources (e.g., datasets, APIs, integrations). These may need to be updated manually.

Preview the App

1. Navigate to the **Creator Home** page.
2. Hover over the **App Tile** of the application you wish to preview.
3. Click the **Edit App** button.
4. In the **App Designer** page, click the **Run** button located at the top-right corner.
5. You will be prompted to confirm the **email address** you want to use for running the preview. Click **OK** to proceed.
6. The app will run, allowing you to test its functionality **as if you were the specified user**.
7. To return to the **App Designer** page, click the **Edit** button located at the bottom-left corner of the preview page.

Note

- When previewed as another user, the audit trail records the creator's actual email as the actor.
- Once the app has been run with a specified preview email, the **component-level Run** feature will continue using that email unless explicitly changed via **App Run**.
- If the specified preview email does not correspond to an existing user (i.e., the user has not yet logged in), the system will create a **temporary user** with the specified email. This temporary user is granted access to *all User Groups* for testing purposes. To test with **specific User Group permissions**, you must assign the preview email to the intended User Group beforehand.
- If you are testing workflows involving notifications or emails, verify that the specified preview email is properly configured to receive messages.

Warning

- Running an app as a different user in preview mode is intended **only for testing**. Do not rely on this behavior as a replacement for proper role-based access control in production.

Share App URL

1. Navigate to the **Creator Home** page.
2. Open the app you wish to share by clicking **Edit App**.
3. In the **App Designer** page, click the **App URL** button located at the top-right corner.
4. In the popup dialog, copy the displayed URL, then click **OK** to close the prompt.
5. You can now use the copied URL to access the app.

Note

- If the app is still in **DEV mode**, the URL will only work when --dev is appended to the app path. For example: https://app-path--dev.ireka.my/

Tips

- Use the **copied URL** in communications with testers or team members to provide direct access without requiring navigation through the Creator Home.

Warning

- Sharing a **DEV mode URL** may grant access to incomplete or experimental features. Only share the DEV URL with trusted users for testing purposes.

View App Summary

1. Navigate to the **Creator Home** page.
2. Hover over the **App Tile** of the application you wish to review, then click the **Edit App** button.

3. In the **App Designer** page, click the **App Summary** button located at the top-right corner.
4. You will be redirected to the **App Summary** page, where you can view key information about the app, including:
    - Number of components built
    - Data record counts
    - Number of users
    - File upload storage size
    - Other relevant usage statistics

Tips

- Use the **App Summary** to monitor app growth, resource usage, and user activity.
- Regularly check the summary after updates or additions to ensure all components are accounted for.
- Export summary information if needed for reporting or auditing purposes.

Warning

- The **App Summary** reflects the current state of the app; it may not update automatically if changes are made in another session. Refresh the page to view the latest data.

Form Design

Create a New Form

1. Navigate to the **App Designer** page → **UI Editor**.
2. Click on the **+ New Form** button located under the **Forms** section in the side menu.
3. In the **Add Form** modal dialog, enter the **Name** of your form.
4. If the new form is an extension of an existing form, select the corresponding form in the **Extend From** field.
5. Configure additional options in the **Options** tab as described below:

Option	Description
Nav Type	Defines the navigation type (e.g., top-level container).
Align	Specifies the alignment of the section.
Single Data	Determines whether the form creates or updates information based on the specified *Qualifier*, ensuring that only one data record exists per qualifier.
Disable Server-Side Entry Validation	Disables validation checks performed on the server side.
Previous Form	Specifies the preceding form, if the current form is intended to follow another form.
Entry User Specified As	Overrides how the entry owner's email is captured.
Start Date	Defines the start date for the form's active period.
End Date	Defines the end date for the form's active period.
Code Formatter	Formats the $code value using Java String Formatter.
Counter	Maintains a counter for the number of entries created through this form.
New Entry Mailer	Email notification triggered when a new entry is created.
Entry Update Mailer	Email notification triggered when an entry is updated.
Retract Mailer	Email notification triggered when an entry is retracted.
List of Facets	Specifies the available facets for the form.

6. Define the **Form Lifecycle** in the **Lifecycle** tab:
   - **Init Function** – Executes when the form is loaded in add/edit mode.
   - **On Save** – Executes immediately after an entry is saved.
   - **On Submit** – Executes after an entry is submitted.
   - **On View** – Executes when the entry is viewed.

   Note
   If you want certain functions to run only for specific facets, create a condition to check the current facet using $action$. For example:
   ```
   if ($action$ === 'admin-update') {
     // This code runs only in the 'admin-update' facet
   }
   ```
7. When configuration is complete, click on the **Save Form** button.
8. The system will generate a blank form with a default section named **Section 1**.

💡 **Tips**

- **Naming Convention**: Use clear, descriptive names for your forms to avoid confusion when multiple forms exist.
- **Single Data Setting**: Enable this only if the form must strictly allow one record per qualifier.
- **Lifecycle Functions**: Keep lifecycle scripts modular and well-commented. Overly complex code can make debugging difficult.
- **Mailer Configuration**: Test mailer settings in a staging environment before applying them in production to avoid accidental mass emails.
- **Date Settings**: Ensure that the start and end dates are carefully reviewed, as expired forms will no longer be accessible to users.

⚠ **Warning**

- Disabling **server-side entry validation** may lead to data inconsistencies or security risks if client-side validation fails. Use this setting only when absolutely necessary.
- Incorrect configuration of **facets** or **lifecycle scripts** can cause unintended execution flows, potentially affecting data integrity.

Add a New Tab (for Forms with Nav Type)

1. Click the **+** button located above the first section of the form.
2. In the **Edit Tab** dialog, enter the following details:

Field	Description
Tab Name	Enter the name of the tab.
Pre-requisite *(optional)*	The tab will only be displayed if the specified condition is met.
On Tab Activate *(optional)*	If specified, the function will be triggered when the tab is activated.
Enable Condition *(optional)*	The tab will be enabled only when the specified condition is satisfied.
Facet Mode	Adjusts the state of the tab based on the currently active facet.

3. Specify the tab's icon in the **Icons** tab if desired.
4. Once all details are complete, click the 💾 **Save Tab** button to save the changes.

📌 **Notes**

- Each section must be assigned to a **parent tab** in order to be displayed within that tab.
- To prevent users from switching tabs freely, enable **Progressive/Multi-step Form** in **Edit Form → Options**. This enforces sequential navigation between tabs.

💡 **Tips**

- Use descriptive tab names to make navigation intuitive for users.
- Use **Pre-requisite** and **Enable Condition** to create dynamic tabs that appear only when relevant.
- Assign icons to tabs to improve visual recognition and usability.

⚠ **Warning**

- Tabs without assigned sections will appear empty in the form.

Edit an Existing Tab (for Forms with Nav Type)

1. Hover over the tab you wish to modify and click the ✏ **Edit Tab** button.
2. In the **Edit Tab** dialog, update the details as needed, including the tab name, conditions, facet mode, or icon.

3. After completing all changes, click the **Save Tab** button to apply and save your updates.

Tips

- Use descriptive tab names and icons to improve navigation for users.
- Review any conditional logic or facet settings to ensure they still align with the tab's intended behavior.
- Test the tab after editing to verify that all sections display correctly.

Warning

- Changes to a tab may affect the visibility or behavior of sections assigned to it; verify assignments after editing.
- Ensure that any pre-requisites or enable conditions are correctly updated to avoid unexpected tab behavior.

Remove a Tab (for Forms with Nav Type)

1. Hover over the tab you wish to remove and click the **Remove Tab** button.
2. In the **Remove Tab** dialog, click the **Remove Tab** button to confirm the removal.

Note

- After removing a tab, ensure that all sections previously assigned to the removed tab are **re-assigned to a new parent tab**; otherwise, they will no longer be displayed in the form.

Tips

- Verify section assignments before and after removing a tab to prevent orphaned sections.
- Update any conditional logic (Pre-requisites, Enable Conditions, or Facet Mode) affected by the removal.
- Use meaningful tab names and icons for the remaining tabs to maintain clarity in navigation.

Add a New Section

1. In the **UI Editor**, select the form under the **Forms** menu.
2. Click on the **Add Section** button.
3. In the **Edit Section** dialog, enter the **Section Name**.
4. Select the **Section Type**:

Type	Description
Section	Normal section for standard form fields.
Child	Section can contain a list of data, e.g., a One-to-Many relationship.
Approval	Section used as an **Approval Form** in Process Tier. This section will **not** be visible during form execution.

5. If the form uses **Nav Type**, specify the **Parent Tab** for the section (*see Note below*).
6. Adjust section visibility in the **Visibility** tab:

Visibility Option	Description
Pre-requisite	Section appears only if the specified condition is met.
Facet Mode	Adjusts the state of fields in this section based on the active facet: ▪ **Edit**: Field is editable. ▪ **View**: Field is view-only. ▪ **Disabled**: Field is in edit mode but disabled.

	▪ **Hidden**: Section is hidden but still part of the form; validations still apply. ▪ **None**: Section is completely removed from the form.

7. Optionally, select an icon for the section in the **Icon** tab.
8. Click **Save Section** to save your changes.
9. The newly created section should now appear in your form.

Notes

- For forms with **Nav Type**, to display a section outside tabs, set the parent as **Head** (above tabs) or **Bottom** (below tabs).
- Sections with an **unspecified parent** will not be displayed in the form.

Tips

- Use descriptive section names to make forms easier to navigate.
- Configure **Facet Mode** carefully to control field states across different user roles.
- Regularly verify section visibility and parent assignment, especially in forms with multiple tabs.

Warning

- Hidden or incorrectly parented sections may cause unexpected validation errors in the form.
- Approval sections will not be visible during normal form execution; ensure they are only used in Process Tier workflows.

Edit an Existing Section

1. Hover over the section; in the **top-right corner**, the **Edit** and **Remove** buttons will appear.
2. Click the **Edit** button.
3. In the **Edit Section** dialog, update the section configuration as needed, including the name, type, visibility, facet mode, or icon.
4. After completing the changes, click the **Save Section** button to apply your updates.

Note

- Changing the **Section Type** will modify the form's underlying data structure.
- If the form has been previously used, you may need to **re-structure existing data using Lambda** to ensure that older entries remain viewable or editable with the updated form.

Rearrange Sections

If your form contains multiple sections, you can **rearrange them** to adjust the order of appearance.

1. Hover over the section; in the **top-right corner**, the **Left Arrow** and **Right Arrow** buttons will appear.
2. Click the **Left Arrow** to move the section **up** or **left** in the form order.
3. Click the **Right Arrow** to move the section **down** or **right** in the form order.

Tips

- Rearrange sections to ensure logical flow for users filling out the form.
- After rearranging, preview the form to confirm the order is as intended.

Add a Form Item into a Section

1. Expand the **Palette** pane on the right side of the **Form Designer** page.

2. Select a field from the Palette and **drag and drop** it into the desired section.
3. In the **Add New ...** dialog, enter the **Label** for the field.
4. If the **Code** is unavailable, update it until a unique code is generated.
5. Configure the **Field Settings** as needed:

Setting	Description
Hide Label	Hides the label for the field.
Read Only	Makes the field read-only.
Type	Specifies the input type (e.g., text, number, date).
Element Width	Sets the width of the field. Options: **Responsive Size** or **Fixed Size**.
List Source	Datasource for autocompletion or lookup field types.
Sub Type	Defines the sub-type for the input field.
Placeholder	Displays muted text when the field is empty.
Hide Field	Hides the field from the form.

6. Configure **Validation** rules in the **Validation** tab as needed.
7. Configure additional **Field Options** in the **Options** tab:

Option	Description
Hint	Text displayed below the field to provide guidance to the user.
Pre-requisite	Field is only shown if the specified condition is met.
Post-action	Function triggered when the field value is changed.
Facet Mode	Adjust the field state based on the active facet: ▪ **Edit**: Field is editable. ▪ **View**: Field is view-only. ▪ **Disabled**: Field is in edit mode but disabled. ▪ **Hidden**: Field is hidden; validations still apply. ▪ **None**: Field is completely removed from the form.

8. Once all configurations are complete, click the 💾 **Save Item** button.
9. The field should now appear within the section.

📌 **Notes**

- Ensure the field code is unique to prevent conflicts with other form items.
- Fields hidden via **Facet Mode** or **Hide Field** setting still exist in the form structure and may affect validations. To entirely remove the field conditionally, use **Pre-requisite**.

💡 **Tips**

- Use descriptive labels and hints to make forms more user-friendly.
- Test the field with different facet modes and pre-requisites to ensure expected behavior.

⚠ **Warning**

- Removing or hiding a field incorrectly may cause validation errors in the form.
- Post-action scripts should be tested to prevent unintended updates to other fields or data.

Rearrange Form Items

1. Hover over (or tab to) the **Form Item** you wish to move.
2. The **Grip Icon** ☰ will appear on the left side of the Form Item.
3. Click and hold the **Grip Icon**, then **drag** the Form Item to the desired position in the section.
4. You can also drag the Form Item to **another section** if needed.

💡 **Tips**

- Rearrange form items to create a logical and user-friendly flow.
- After rearranging, preview the form to verify that all items appear in the intended order.

Create a Form Process Flow

1. In the **Form Designer** page, click on the **Process** tab.
2. Click the **Add New Tier** button.
3. In the **Edit Tier** dialog, configure the following details:

Field	**Description**
Tier Name	Name of the tier. This name is displayed on the form's **Submit** button. Keep it concise.
Submission Mailer	Email notification sent when an entry is submitted into the tier.
Resubmission Mailer	Email notification sent when an entry is resubmitted into the tier.
Approval Type	Determines how approval is handled:
- **All**	Any user can perform approval; first come, first served.
- **Dynamic**	Approver is dynamically selected based on an endpoint.
- **Fixed**	Set a fixed approver using an email or a variable from the entry (use {{ }}).
- **Group**	Assign a User Group; any member can approve.
- **Assign**	Admin assigns the approver (available only if Admin is enabled for the form).
Show Approver Email	Displays the approver's email in the approval section when viewing the entry.
Always Approve Decision	Automatically sets the status to always_approve without showing tier actions.
Enable Remark	Shows a remark input for the approver.
Custom Approval Form	Specify a custom approval form using a designated section.

4. Optionally, configure a **callback** in the **Callback** tab to trigger a function after approval.
5. Click the 💾 **Save Tier** button to save the tier.
6. The new tier will now appear in your **Process Flow**.

📌 **Note**

- By default, newly created tiers include the default **Tier Actions**: **Approved**, **Rejected**, and **Returned**. You may edit or remove these default actions if they are not required.
- Use concise and descriptive tier names to make the process flow easy to understand.
- Use **Custom Approval Forms** for specialized approval processes that require additional inputs.

⚠ **Warning**

- Changing **Approver** after entries have been submitted will not be automatically reflected. Refer to Resync Tier approver section for how to resync the approver
- Review related dataset's status filter every time there's changes to Tiers and Tier Actions

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Add a Tier Action to a Tier in Process Flow

1. Click the **+** button within the desired **Tier**.

2. In the **Edit Tier Action** dialog, configure the following details:

Field	**Description**
Label	Text displayed on the Tier Action button.
Code	Unique identifier for the Tier Action within the Tier.
Action	Defines the workflow when this Tier Action is selected:
- **Next Tier**	Move to the next Tier in the Process Flow.
- **Previous Tier**	Return to the previous Tier in the Process Flow.
- **Current Tier**	Remain in the current Tier (stop progress).
- **Go to Tier**	Jump to a specific Tier in the Process Flow.
Mailer	Email notification triggered when this Tier Action is selected.
Allow User to Edit and Resubmit	Enables the user to edit their entry and resubmit to this Tier.
Icon	Icon displayed on the Tier Action button.
Color	Color of the Tier Action button for visual distinction.

3. After configuring all options, click **Save Tier Action** to apply the changes.

Tips

- Ensure the Tier Action **code** is unique within the Tier to prevent conflicts.
- Use clear and concise **Labels** to make the action intuitive for users.
- Assign meaningful **Icons** and **Colors** to visually differentiate actions in the process flow.

Resynchronize Tier Approvers

Occasionally, it may be necessary to **resynchronize approvers**, for example, when the approver list in a User Group has changed.

1. In the **Process** tab, click the **Update Approver for All Tiers** button located at the bottom of the process flow.
2. In the confirmation prompt, type **update-all-tier** and click **OK** to initiate the process.
3. Once the process completes, a **toast notification** will appear to confirm that all tier approvers have been updated.

Notes

- This action updates approvers for **all tiers** in the form.
- Ensure that any changes to User Groups or dynamic approvers are finalized before performing a resync.

Tips

- Perform resynchronization after making bulk changes to approvers to ensure workflow continuity.
- Notify relevant stakeholders after resync if it affects pending approvals.

View Form Entry Trails

1. In the **Form Designer** page, click the **...** button located at the top-right corner of the page (next to the **Edit Form** button).
2. From the dropdown menu, select **Form's Entry Trails**.
3. The **Form's Entry Trails** dialog will appear, displaying all entry trails for the form.
   - Use the **search bar** to find specific keywords.
   - Apply filters to narrow results by **Form Action Status** or **Date Range**.

4. Select **Show Possible Action** to display any available actions related to the trail logs (e.g., revert data, undelete, etc.).
5. To export the logs, click the **Download Excel** button.
6. Click **Close** to exit the dialog.

💡 **Tips**

- Use filters and search to quickly locate relevant entry logs.
- The **Show Possible Action** option is helpful for identifying recoverable or reversible actions.
- Regularly exporting logs can assist with auditing and record-keeping.

⚠ **Warning**

- Entry trail logs are sensitive; ensure only authorized users access them.
- Actions taken from the **Possible Action** options may affect existing data; use caution.

Import Excel Data into a Form

1. In the **Form Designer** page, click the **...** button located at the top-right corner of the page (next to the **Edit Form** button).
2. From the dropdown menu, select **Import Excel Data**.
3. Configure the import settings as needed:

Option	Description
Create Field if Not Exist	Automatically create a form field if a column in the Excel file does not exist in the form.
Create Dataset Automatically	Automatically create a dataset for the form based on the imported data.
Create Dashboard Automatically	Automatically generate a dashboard with possible charts derived from Excel columns.
Import to Live Data	Import the data directly into the live form dataset.

4. Click the **Browse and Import** button.
5. Select the Excel file to import and click **Open**.
6. Monitor the **Import Progress Log** to track the status of the import.
7. Once the import completes, click **Done** to finish the process.

💡 **Tips**

- Ensure the Excel file has headers that match or can map to form fields.
- Check the progress log for any errors or warnings to ensure a successful import.

⚠ **Warning**

- Large Excel files may take time to process; avoid closing the browser until the import completes.

Edit Existing Form Properties

1. In the **Form Designer** page, click the ✎ **Edit** button located at the top-right corner of the page (next to the **Run Form** button).
2. In the **Edit Form** dialog, update the settings or configurations as required.
3. Once all changes are complete, click the 💾 **Save Form** button to apply the updates.

💡 **Tips**

- Review all settings carefully before saving to ensure the form behaves as intended.
- Consider testing the form after updating properties to verify that changes do not affect existing functionality.

Move Form to Another App

1. In the **Form Designer** page, click the **...** button located at the top-right corner of the page (next to the **Edit Form** button).
2. From the dropdown menu, select **Move to Other App**.
3. In the **Move Form to Other App** dialog, choose the **destination App** where you want to move the form.
4. Optionally, select the related dataset under **Include the Following Dataset** if you want to move it along with the form.
5. Once all selections are made, click the **Move Form** button to complete the operation.

Tips

- Include related datasets to preserve the functionality and data integrity of the form in the new App.
- After moving, verify that the form and datasets function correctly in the new App.

Run / Preview the Form

1. In the **Form Designer** page, click the **Form Run** button located at the top-right corner of the form page.
2. You will be redirected to the **Form Preview** page, where the form is fully functional.
3. To return to the form editor, click the **Edit** button located at the bottom-left corner of the page.

Notes

- The preview is a fully functional form; you can enter and save data during preview.
- The form preview will use the **last successful email** used in the **App Run Preview** as the active user.

Tips

- Use the preview to verify field validations, conditional logic, workflows, and facet-based behavior.
- Test the form with different user scenarios to ensure all pre-requisites, visibility rules, and actions function as intended.

Warning

- Data saved during preview may be recorded in the form's dataset. Use test entries to avoid affecting live data.

Remove an Existing Form

1. In the **Form Designer** page, click the **...** button located at the top-right corner of the page (next to the **Edit Form** button).
2. From the dropdown menu, select **Remove Form**.
3. In the **Remove Form** dialog, click the **Remove Form** button to confirm.

Warning

- This action is **irreversible**. Proceed with caution. It is highly recommended to create a **Restore Point** before removing the form.

Dataset Design

Create New Dataset

Steps:

1. Navigate to **UI Editor → Datasets**.
2. Click on the **New Dataset** button.
3. In the **Add Dataset** dialog, provide the following details:

Field	**Description**
List Caption	Enter the name of the dataset.
Description (optional)	Provide a description of the dataset.
Select Form	Choose the form from which data will be retrieved.
List Type	Determine which entries are displayed: **All** – Show all entries from the form regardless of data owner. **User** – Show only entries created by the currently logged-in user. **Approver** – Show only entries requiring approval by the currently logged-in user.
Included Fields	Select the form fields to display in the dataset.
List Entry with Status	Select which entry statuses should be included in the dataset.
Default Sort Field	Choose the field for default sorting.
Sort Direction	Select the default sort order (ascending or descending).

4. Configure additional options under the **Options** tab:

Option	**Description**
Show Status	Display the entry approval status.
Show Index Number	Show index number as the first column.
Show Dataset Summary	Display total elements, total pages, and other summary information.
Hide Search Bar	Hide the search bar in the dataset toolbar.
Turn Row to Card	Convert table rows to a card style when viewed on smaller screens.
Full Width Table	Make the dataset table span the full available width.
Public Endpoint	Enable a public endpoint for external access to this dataset.
Disable Field Mask	Include all entry fields in the dataset, even if they are not selected as dataset fields.
Allow User to Perform Data Grouping	Allow users to group dataset entries using the grouping dropdown menu.
Default Data Grouping Field	Set the default field for grouping the data.
Access Available For	Select the User Groups authorized to access this dataset.
Export	Specify allowed export formats (Excel, CSV, PDF).
Enable Email Blast	Enable sending notifications directly from the dataset.

Enable Add Button	Allow users to add new entries via the dataset interface.
Show Action	Display an action column on the right-most side of each row. **Example:** ✏️ Edit / 🗑️ Delete
Bulk Action	Enable or disable bulk action checkboxes on the left-most side of each row.
Additional Initial Parameter	Set additional parameters for the dataset.
Content Before Dataset	Insert HTML or CSS above the dataset table.
Row's Custom Class	Apply a CSS class to the dataset rows for styling purposes.

5. Define dataset filters in the **Filters** tab:
    - Tick the fields to include them in the dataset filter.
    - Specify default values for preset parameters.
    - For advanced filter conditions, use the **Custom Query Builder**.
6. Once configuration is complete, click **Save List** to create the dataset.

📌 **Notes**

- By default, newly created datasets include **View**, **Edit**, and **Delete** actions. You may retain or remove any of these actions as necessary.
- A common mistake is neglecting to select entry statuses; without selecting a status, the dataset will return empty results.
- Ensure that **Included Fields** and **List Entry with Status** are accurately configured to avoid missing or incomplete dataset results.

💡 **Tips**

- Use **Full Width Table** and **Turn Row to Card** options for optimal viewing on smaller screens.

Edit Existing Dataset

Steps:

1. Navigate to **UI Editor → Datasets**.
2. Select the dataset you wish to edit.
3. Click on the **Edit Dataset** button located at the top-right corner of the Dataset editor (next to the **Remove Dataset** button).
4. In the **Edit Dataset** dialog, update the properties or settings that require modification.
5. Once all changes are complete, click **Save List** to apply the updates and close the dialog.

📌 **Notes**

- Ensure that any changes to fields, filters, or access permissions do not disrupt existing dataset functionality.
- If the dataset is actively used in forms or dashboards, verify the impact of modifications before saving.

Edit or Change Dataset Column

Steps:

1. Hover over the item in the **Displayed Columns** section.
2. **Rearrange Column Position:** Click and hold the **grip icon** to move the column to the desired location.

3. **Edit Column Label:** Click the **Edit** button.
    - In the **Edit Item** dialog, update the label with the desired text.
    - Click **Save Item** to apply the changes.
4. **Remove Column:** Click the **Delete Item** button.
    - A confirmation prompt will appear; click **OK** to proceed with the removal.

Tips

- Rearranging columns affects only the display order in the dataset view and does not impact underlying data.
- Editing the label changes only the visible name; the dataset field code remains unchanged.

Add Dataset Action

Dataset Actions allow users to perform specific operations directly on the data displayed in a dataset.

Steps:

1. In the **Dataset Editor**, navigate to the **Allowed Actions** section and click on the **New Action** button.
2. In the **Edit Action** dialog, configure the following details:

Field	Description
Label	Enter the label for the action button.
Button Type	Choose either **Inline** (button displayed in the action column) or **Dropdown** (menu item in the action dropdown).
Color	Select the color of the button.
Button Action	Choose the appropriate action to be performed when the button is clicked.
Pre-requisite	(Optional) Define a condition; the action button will only appear if this condition is met.

3. To assign or change the action icon, navigate to the **Icon** tab and select the desired icon.
4. Once all configurations are complete, click **Save Action**.
5. The newly created action will appear under the **Allowed Actions** section.

Tips

- Use the **Pre-requisite** field to restrict actions based on user role, dataset status, or other conditions.
- Inline buttons are ideal for frequently used actions, while dropdown actions are better suited for less common operations.

Edit Dataset Action

Dataset Actions can be updated to modify their behavior, appearance, or conditions for display.

Steps:

1. In the **Allowed Actions** section of the **Dataset Editor**, locate the action you want to modify and click the **Edit** button.
2. In the **Edit Action** dialog, update the properties as needed, including:
    - **Label**
    - **Button Type** (Inline or Dropdown)
    - **Color**

    - **Button Action**
    - **Pre-requisite** conditions
    - **Icon** (if applicable)
3. Once all updates are complete, click **Save Action** to apply the changes.

📌 **Notes**

- Changes to pre-requisite conditions will affect the visibility of the action for users based on those conditions.

Delete Dataset Action

Dataset Actions can be removed when they are no longer needed.

Steps:

1. In the **Allowed Actions** section of the **Dataset Editor**, locate the action you want to remove and click the **Delete** button.
2. When prompted for confirmation, type or acknowledge as required and click **OK** to confirm the deletion.
3. The action will be removed from the dataset and will no longer be available to users.

⚠ **Warning**

- This action is **irreversible**. Ensure that the action is no longer needed before deleting it.
- Removing an action may affect any workflows or users who previously relied on it.

Clear Dataset Entries

Clearing dataset entries allows you to remove data that matches the dataset's filter settings.

Steps:

1. At the bottom of the **Dataset Editor**, click the 🗑 **Clear All Entry** button.
2. When prompted for confirmation, type **clear-dataset-entries** and click **OK** to confirm the action.

📌 **Note**

- This action will only remove entries that satisfy the dataset's **status** and **filter** conditions.

⚠ **Warning**

- This action is **irreversible**. Ensure that you have backed up any important data before proceeding.

Delete Dataset

Deleting a dataset will remove the dataset configuration permanently.

Steps:

1. Navigate to **UI Editor > Datasets**.
2. Select the dataset you wish to delete.
3. At the **top right** of the Dataset Editor, click the 🗑 **Remove Dataset** button (located beside the **Run Dataset** button).
4. In the **Remove List** dialog, click **Remove Data List** to confirm the deletion.

📌 **Note**

- This action only removes the dataset configuration. Existing form entries are **not deleted** unless the dataset is cleared separately.

⚠ **Warning**

- Deleting a dataset is **irreversible**. Ensure that a **Restore Point** or backup exists if you may need the dataset in the future.

Copy / Clone Existing Dataset

You can create a duplicate of an existing dataset to use as a template or for modification without affecting the original.

Steps:

1. Navigate to **UI Editor > Datasets**.
2. Click the **Clone Dataset** button in the side menu.
3. In the **Duplicate Dataset** dialog, select the dataset you wish to copy.
4. Click **Start Duplicate Dataset** to begin the copy process.
5. Once the copy operation is complete, the **Edit Dataset** dialog for the newly duplicated dataset will appear.
6. Update any details if necessary.
7. Click **Save List** to apply changes and dismiss the dialog.
8. You will be redirected to the **Dataset Editor** for the newly copied dataset.

📌 **Note**

- The cloned dataset is independent of the original. Any changes made to the new dataset will **not affect** the original dataset.

💡 **Tip**

- Use this feature to quickly create datasets with similar configurations or filters, saving time on repetitive setup.

Dashboard Design

Create New Dashboard

Steps:

1. Navigate to **App Designer → UI Editor**.
2. Click on the **New Dashboard** button under the **Dashboard** submenu.
3. In the modal dialog, enter the following details:

Field	Description
Dashboard Name	Enter the name of the dashboard.
Description	(Optional) Enter a brief description of the dashboard.
Full width dashboard	Select this option to make the dashboard span the full available width.
Show Print button	Enable to display a Print button on the dashboard page.
Access available for	Restrict access to the dashboard by specifying authorized User Groups.

4. Once finished, click **Save Dashboard** to create the dashboard.

Note

- Ensure that only authorized User Group are added to the **Access available for** field to prevent unauthorized viewing for sensitive statistics.

Tip

- Use the **Full width dashboard** option for dashboards with multiple charts or tables to enhance readability on wide screens.

Edit Existing Dashboard

Steps:

1. Navigate to **App Designer → UI Editor**.
2. Select the dashboard you wish to edit from the **Dashboards** submenu.
3. At the top-right corner of the **Dashboard editor**, click on the **Edit Dashboard** button (located beside the **Remove Dashboard** button).
4. In the **Edit Dashboard** dialog, update the properties and settings that you wish to modify.
5. Once finished, click **Save Dashboard** to apply the changes and close the dialog.

Note

- Ensure any changes to **Access available for** are reviewed carefully to maintain proper dashboard permissions.

Tip

- If you are changing the layout or width settings, preview the dashboard after saving to verify proper display across different screen sizes.

Remove Dashboard

Steps:

1. Navigate to **App Designer → UI Editor**.
2. Select the dashboard you wish to remove from the **Dashboards** submenu.

3. At the top-right corner of the **Dashboard editor**, click on the **Remove Dashboard** button (located beside the **Run Dashboard** button).
4. In the **Remove Dashboard** dialog, click **Remove Dashboard** to confirm the deletion.

⚠ **Warning**

- This action is irreversible. Ensure that you have created a **Restore Point** or backup before removing the dashboard.
- Any charts associated with this dashboard will also be deleted.

Create New Chart in Dashboard

Steps:

1. Navigate to **App Designer → UI Editor**.
2. Select the dashboard in which you want to add the chart.
3. Click on the **Add Chart** button.
4. In the **Add Chart** modal dialog, configure the following details:

Field	Description
Chart Caption	Enter the title or caption for the chart.
Description	Optional description for the chart.
Source Type	Specify the source of the statistical data.
Select Form	Choose the form from which statistical data will be derived.
Plottable Category	Select the column to be used as the category for plotting.
Plottable Value	Select the column representing the values for plotting.
Series Chart	Enable this option if you want to create a series chart.
Plottable Series	Select the column to define the series (if series chart is enabled).
Aggregate Type	Specify the aggregation type (e.g., sum, average).
Width	Set the width of the chart.
Height	Set the height of the chart.
Chart Type	Choose the chart type to be plotted (e.g., bar, line, pie).
Show Tooltip Label	Enable tooltips for data points.
Show Total in Statistic Table	Display total values in the statistic table.
Initially Flipped	Show the statistic table first instead of the chart.
Show Percentage	Display percentages in the statistic table.
List Entry with Status	Select which entries (by status) will be counted for statistics.

5. Optionally, configure filters in the **Filters** tab to refine the dataset for the chart.
6. Once all settings are configured, click **Save Chart**.

💡 **Tips**

- Always preview the chart to verify the statistics and visual output before finalizing.
- If no entry status is selected, the chart may show incorrect or empty data.

📌 **Notes:**

- Ensure that the **Plottable Category** and **Plottable Value** columns are correctly chosen, as they determine how the data is visualized.

- For series charts, make sure the **Plottable Series** column is correctly selected to avoid misrepresentation of data.

Edit Existing Chart

Steps:

1. Hover your pointer over the chart in the **Dashboard editor**.
2. Click on the **Edit Chart** button located at the top right corner of the chart.
3. In the **Edit Chart** dialog, update the details or configuration you wish to modify.
4. Once all changes are made, click **Save Chart** to apply the updates and dismiss the dialog.

Notes

- Ensure that any changes to the **Plottable Category**, **Plottable Value**, or **Series** columns are consistent with your data, as altering them may affect the chart visualization.
- Always preview the chart after editing to verify that the statistics are correct.

Tip

- Minor edits such as changing the chart caption, description, or display options can be done without impacting the underlying dataset or data aggregation.

Rearrange Chart in Dashboard

Steps:

1. Hover your pointer over the chart you wish to rearrange.
2. Click and hold the **grip icon** located at the top-left corner of the chart.
3. Drag the chart to the desired position within the dashboard layout.

Notes

- Changes are automatically saved in the dashboard layout once the chart is dropped.

Tip

- Use this feature to organize charts logically according to priority, category, or readability for end users.

Remove Chart from Dashboard

Steps:

1. Hover your pointer over the chart you want to remove in the Dashboard editor.
2. Click on the **Remove Chart** button located at the top-right corner of the chart.
3. In the **Remove Chart** dialog, click on the **Remove Chart** button to confirm the removal and dismiss the dialog.

Warning

- This action is **irreversible**.

Tip

- Consider exporting or taking a screenshot of the dashboard layout before removing charts if you may need to reference the previous arrangement later.
- It is recommended to create a restore point before removing a chart to prevent accidental loss of configuration or data.

Custom Screen Design

Create New Custom Screen

Steps:

1. Navigate to **App Designer page > UI Editor**.
2. Click on the **New Screen** button under the **Custom Screen** submenu (expand the submenu if needed).
3. In the **Add Screen** dialog, enter the following details:

Field	Description
Title	Title of the screen.
Description (optional)	Optional description for the screen.
Show Print button	Enable to show a Print button on the screen.
Hide Screen Title	Enable to hide the default screen title.
Full width screen	Enable to make the screen span the full available width.
Screen Type	Select the type of screen to create: • **QR Scanner**: Uses device camera to scan QR codes. • **Prompt**: Simple prompt input screen. • **Entry Page**: Screen bound to a Form's data. • **Entry List**: Screen bound to a Dataset's data. • **Static Page**: Build from scratch using HTML and JavaScript. • **Calendar**: Displays a calendar bound to a dataset list. • **Chatbot**: Chatbot interface for Cogna. • **Bucket**: Displays files uploaded to a specified Bucket. • **Map**: Displays location data from a dataset on a map. • **Mailbox**: Shows notifications from a Mailer. • **Combined**: Combines multiple components (Form, Dataset, Custom Screen, Lookup, etc.) into a single screen using tabs or accordion.
Access Restriction (optional)	Enable to restrict access to specific User Groups.

4. Once all details are entered, click **Save Screen** to save the screen and dismiss the dialog.

💡 **Tip**

- Use the **Combined** screen type to consolidate multiple components into a single interface for better user experience.

⚠ **Warning**

- Once created, the **Screen Type** cannot be changed.
- Ensure access restrictions are set correctly if the screen contains sensitive data or critical functionality.

Add Action in Custom Screen

Screen Actions can be used to trigger functionality within a custom screen. These actions can be executed via:

- **Anchor href:** $go['actionid']
- **Element event listener:** $popup['actionid']()

Steps:

1. In the **Screen editor** page, click on the **Add Action** button at the bottom.
2. In the **Edit Action** dialog, provide the following details:

Field	**Description**
Label	The display label for the action.
Action Type	Select the type of action to execute (e.g., Navigate, Popup, Custom Script).
Action Target	Specify the target component or element for this action.
Parameters (optional)	Enter any parameters to be passed to the action target.

3. Once all details are entered, click **Save Action** to save the action and dismiss the dialog.

Note

- Screen Actions are reusable and can be triggered from multiple elements within the screen.
- Use parameters to make actions dynamic and context-aware. For example, pass the current entry ID to perform operations on a specific record.

Edit Existing Screen Action

Steps:

1. In the **Custom Screen editor**, locate the action you want to edit and click on the **Edit Action** button at the right-most end of the action row.
2. In the **Edit Action** dialog, update the desired details, such as **Label**, **Action Type**, **Action Target**, or **Parameters**.
3. Once all changes are made, click **Save Action** at the bottom-left of the dialog to save your updates and dismiss the dialog.

Note

- Updating an action will immediately reflect in all elements or triggers that reference this action.

Tip

- Use descriptive labels for actions to make it easier to identify them when managing multiple actions in the same screen.

Remove Screen Action

Steps:

1. In the **Custom Screen editor**, locate the action you want to remove and click on the **Remove Action** button at the right-most end of the action row (next to the **Edit Action** button).
2. In the **Remove Action** dialog, click **Remove Action** to confirm the removal and dismiss the dialog.

Warning

- This action is **irreversible**. Once removed, the action cannot be restored.
- Ensure that the action is not being referenced elsewhere in the screen to avoid broken triggers.

Edit Existing Screen Properties

Steps:

1. Navigate to **App Designer > UI Editor**.
2. Select the **Screen** you wish to update under the **Custom Screen** submenu.
3. In the top-right corner of the Screen editor, click the **Edit Screen** button.
4. In the **Edit Screen** dialog, update the properties and details as required.
5. Once finished, click **Save Screen** to apply the changes and dismiss the dialog.

⚠ **Warning**

- The **Screen Type** cannot be changed once the screen is created.
- Modifying critical properties (like access restrictions) may affect user access or functionality. Ensure appropriate settings before saving.

Remove Custom Screen

Steps:

1. Navigate to **App Designer > UI Editor**.
2. Select the **Screen** you wish to remove under the **Custom Screen** submenu.
3. In the top-right corner of the Screen editor, click the **Remove Screen** button.
4. In the **Remove Screen** dialog, click **Remove Screen** to confirm the removal and dismiss the dialog.

⚠ **Warning**

- This action is **irreversible**.
- It is recommended to create a **Restore Point** before removing the screen.

Copy/Clone Existing Screen

Steps:

1. Navigate to **App Designer > UI Editor**.
2. Click on the **Clone Screen** button under the **Custom Screen** submenu (expand the submenu if necessary).
3. In the **Duplicate Screen** dialog, select the screen that you wish to clone or copy.
4. Click on the **Start Duplicate Screen** button to initiate the copy process.
5. Once the copy is complete, the **Edit Screen** dialog for the newly cloned screen will appear.
6. Update the screen details in the **Edit Screen** dialog if necessary.
7. Click **Save Screen** to apply the changes and dismiss the dialog.

Note

- The cloned screen will include all components, settings, and actions of the original screen.
- References in the newly cloned screen will automatically point to the newly cloned actions.
- It is recommended to review and test the cloned screen to ensure that all actions, navigation, and functionality work as expected. Screen type cannot be changed after saved.

Tip

- Consider updating the title or description of the cloned screen to clearly distinguish it from the original.

Navigation Structure

Create Navigation Group

Steps

1. Navigate to **App Designer > UI Editor > Structure**.
2. Click on the **Add Group** button to create a new Navigation Group.
3. In the **Add Group** dialog, provide the following details:

Field	Description
Title	The display title of the Navigation Group.
Access Available For *(optional)*	If specified, only the selected **User Group(s)** will be able to view this Navigation Group.
Pre-requisite *(optional)*	If defined, the Navigation Group will only be displayed when the specified condition is met.

4. Once all required details are entered, click the **Save Group** button to confirm and save the new Navigation Group.

⚠ **Warning**

- Misconfigured **Pre-requisite** conditions may cause the Navigation Group to remain hidden unintentionally. Always verify conditions after saving.

Tip

- Use **Access Available For** to restrict Navigation Groups for different roles (e.g., Admin, Manager, or Staff), ensuring users only see what is relevant to them.

Edit Existing Navigation Group

Steps

1. Hover over the navigation group that you wish to edit.
2. Click on the ✎ **Edit Navigation Group** button
3. In the **Edit Group** dialog, update the required details as necessary.
4. Once finished, click on the **Save Group** button to apply the changes.

Note

- Editing a Navigation Group does not affect the screens or components associated with it. Only the group's properties (such as **Title**, **Access Available For**, or **Pre-requisite**) will be updated.
- If you are updating **Access Available For**, double-check user group assignments to prevent accidental access restrictions.

Remove Navigation Group

Steps

1. Hover over the **Navigation Group** that you wish to remove.
2. Click on the **Remove Navigation Group** button.
3. In the **Remove Group** confirmation dialog, click on the **Remove Group** button to confirm and dismiss the dialog.

⚠ **Warning**

- Removing a Navigation Group is **irreversible**. Once deleted, all associated references to the group will no longer be accessible.

- Removing a **Navigation Group** will also **permanently remove all Navigation Items contained within it**.

Note

- This action only removes the Navigation Group container. It does not delete the screens or components linked to it.

Rearrange Navigation Group

Steps

1. Hover the pointer over the **Navigation Group** that you wish to rearrange.
2. Use the directional buttons to adjust the order:

   Arrow Up Button – Moves the Navigation Group **upward** in the list.

   Arrow Down Button – Moves the Navigation Group **downward** in the list.

Note

- Rearranging Navigation Groups only affects their **display order** in the application's navigation structure. It does not change the group's content or properties.

Create Navigation Item

Steps

1. Click on the **Add Item** button located at the bottom of the desired **Navigation Group**.
2. In the **Add Item** modal dialog, provide the following details:

Field	Description
Title	The display title of the Navigation Item.
Type	The type of component the item should navigate to.
Skip Location Change *(optional)*	If enabled, the routing action will not update the browser's address bar URL.
Hide Description *(optional)*	If enabled, the component description will not be shown on the tile page.
Pre-requisite *(optional)*	Defines a condition that must be met for the Navigation Item to be visible.

3. Select an appropriate **Icon** for the Navigation Item under the **Icon** tab.
   Example: (Home), (Document), (Chart).
4. Once finished, click on the **Save Item** button to confirm and close the dialog.

Note

- Choosing a clear and meaningful **icon** improves user recognition and overall navigation experience.

Edit Existing Navigation Item

Steps

1. Hover the pointer over the **Navigation Item** you want to edit.
2. Click on the **Edit Navi Item** button.
3. In the **Edit Item** dialog, update the necessary details (e.g., Title, Type, Icon, or other settings).

4. Once finished, click on the 💾 **Save Item** button to save the changes and dismiss the dialog.

💡 **Tip:**

- When editing a Navi Item, ensure that the **Title and Icon** remain consistent with the Navigation Group's purpose for better usability.

Remove Navigation Item

Steps

1. Hover the pointer over the **Navigation Item** you wish to remove.
2. Click on the 🗑 **Remove Navi Item** button.
3. In the **Remove Item** dialog, click on the ✖ **Remove Item** button to confirm and dismiss the dialog.

⚠ **Warning**

- Removing a Navigation Item is **irreversible**. Once deleted, the item and its configuration cannot be restored unless recreated manually.

Rearrange Navigation Item

Steps

1. Hover the pointer over the **Navigation Item** you wish to rearrange.
2. Click and hold the ☰ **grip icon**, then drag the item to your desired position within the same Navigation Group.
3. Alternatively, you may also drag the **Navigation Item** and drop it into a different **Navigation Group**.

💡 **Tip**

- Use the drag-and-drop feature carefully to avoid accidental reordering. If an item is moved to another Navigation Group, ensure that its visibility and prerequisites remain valid in the new context.

Edit Navigation Initialization Function

Steps

1. Navigate to **Designer** > **UI Editor** > **Structure**.
2. In the Navigation Editor page, click on the **Edit Navigation Settings** button located at the top-right corner.
3. In the **Edit Navigation Settings** dialog, specify or update the script in the **Init Function** field.
4. Once finished, click on the **Save Settings** button to apply the changes and dismiss the dialog.

⚠ **Warning**

- Changes to the **Init Function** directly affect how navigation is initialized. Ensure that the script is properly validated and tested before saving to prevent runtime errors.

Lookup Management

Create a New Lookup

Steps:

1. Navigate to **Lookup Manager**.
2. Click the **Create Lookup** button.
3. In the **Lookup Configuration** modal dialog, enter the following details:

Field	**Description**
Lookup Name	Name of the lookup.
Lookup Description	Description for the lookup.
Source Type	Data source for the lookup.
Full Width Table	Display the lookup list as a full-width table.
Auto-sync Lookup on ...	Automatically sync this lookup data in entries when the lookup data is updated.
Disable EXTRA Field	Hide the extra field in the lookup.
Hide CODE Field	Hide the code field in the lookup.
Enable Additional Data Field	Enable additional attributes for the lookup. These attributes are accessible via /data field.
Override Column Label	Override the label shown on the lookup entry form or in the lookup list table. **Note:** In code, access values using .code, .name, or .extra.
Access to Edit ...	Assign a User Group that has permission to update this lookup.
Additional Data Field	Define additional data fields in the format: • <field_code>,<field_code> • <field_code>:<type> • <field_code>:<type>@<path-pointer> Where type can be: text, longtext, number, date, options, lookup, multiplelookup, file.

4. Once all configurations are set, click the **Save Lookup** button to create the lookup.

Tips

- Use descriptive names and descriptions to easily identify the lookup.
- Enable **Auto-sync** to ensure entries always reflect updated lookup data.
- Use **Additional Data Fields** to include extra attributes without modifying the core lookup structure.

⚠ **Warning**

- Changes to lookup structure may affect forms or processes that depend on this lookup.
- Ensure proper access control is set to prevent unauthorized modifications.

Edit an Existing Lookup

Steps:

1. Navigate to **Lookup Manager**.
2. Select the lookup you want to edit.
3. Click the **Edit** button located on the top toolbar of the lookup page.

4. In the **Lookup Configuration** modal dialog, update the details as required.
5. Once all changes are made, click the **Save Lookup** button to apply the updates.

Note

- Updating or changing **data** in a lookup will **not** automatically update existing form entries that were saved with the old values.
- To synchronize the updated lookup data with existing form entries, refer to the **Resync Lookup** section.

Tips

- Review dependent forms or workflows before editing a lookup to avoid unintended data inconsistencies.

Add a New Lookup Entry

Steps:

1. In the **Lookup** page, click the **+ Add Data** button located at the top-right corner.
2. Fill in the required details in the form fields.
3. Once all information is entered, click the **Save Lookup** button to save the new entry.

Tips

- Ensure the code is unique.
- Use meaningful values for lookup entries to maintain consistency across forms.

Import Lookup Entries from Excel

Steps:

1. In the **Lookup** page, click the **...** button located at the top-right corner.
2. From the dropdown menu, select **Import from Excel**.
3. In the **Import Lookup from Excel** dialog, click the **Browse** button.
4. Select the Excel file you wish to import and click **Open**.
5. Monitor the **Import Progress Log** to track the import status.
6. Once the import completes, click the **Close** button to exit the dialog.

Note

- Ensure that the Excel file **meets the lookup data import requirements** as specified in the modal dialog to avoid errors.
- Verify that column headers in the Excel file match the lookup field to ensure proper mapping.
- For large datasets, check the progress log for any warnings or errors during import.

Export Lookup Entries to Excel

Steps:

1. In the **Lookup** page, click the **...** button located at the top-right corner.
2. From the dropdown menu, select **Export to Excel**.
3. The Excel file containing all lookup entries will be downloaded to your browser's default download directory.

Warning

- Exported Excel files may contain sensitive data; store and share them securely.
- Large lookups may take a few moments to generate the Excel file—avoid closing the browser during the process.

💡 **Tips**

- Use exported Excel files to review, backup, or modify lookup data before re-importing.

Resync Lookup

Sometimes it is necessary to **resynchronize lookup data manually** rather than during the add/edit form actions.

1. In the **Lookup** page, click the **...** button located at the top-right corner.
2. From the dropdown menu, select **Resync Lookup**.
3. In the **Resync Lookup** dialog, select the **Reference Column**.
   - The reference column is used to compare common values between the lookup data and the data in form entries.
4. Once the reference column is selected, click **Resync Lookup** to initiate the synchronization.

💡 **Tips**

- Use manual resync when lookup entries have changed, and you need to update existing form entries.
- Verify that the reference column is correctly set to avoid mismatched data during synchronization.

⚠ **Warning**

- Resyncing lookup data may overwrite existing form entry values for the selected reference column.

Clear Lookup Entries

Steps:

1. In the **Lookup** page, click the **...** button located at the top-right corner.
2. From the dropdown menu, select **Clear Lookup Entries**.
3. In the confirmation prompt, type **clear lookup entries** and click **OK** to proceed.
4. All entries in the lookup list will be permanently cleared.

💡 **Tips**

- Consider exporting the lookup entries to Excel before clearing as a backup.
- Use this function primarily for cleanup or resetting test data.

⚠ **Warning**

- This action is **irreversible**. Once cleared, the lookup entries cannot be recovered unless a backup exists (you can create a backup by exporting to Excel. Refer to **Export Lookup Entries to Excel**)
- Ensure that no critical forms or processes rely on the lookup data before clearing entries.

Remove a Lookup

Steps:

1. In the **Lookup** page, click the **...** button located at the top-right corner.
2. From the dropdown menu, select **Remove Lookup**.
3. In the **Remove Lookup** modal dialog, click the **Remove Lookup** button to confirm the removal.

💡 **Tips**

- Consider exporting or backing up the lookup entries before removing the lookup.

- Use this function primarily for obsolete or redundant lookups.

⚠ **Warning**

- This action is **irreversible**. Once removed, the lookup and all its entries cannot be recovered unless a backup exists.
- Ensure that no forms or processes are dependent on this lookup before performing the removal.

Mailer Management

Create a New Mailer

1. Navigate to **Mailer Manager**.
2. Click the **Create Mailer** button.
3. In the **Add Mailer** modal dialog, enter the following details:

Field	Description
Mailer Name	Name of the mailer.
Subject	Subject line of the notification email.
Content	Content of the notification. You can use value placeholders to dynamically insert form or entry data. **Tip:** Select **Form** from the hint selector (top-right corner of the content editor) to enable placeholder autocomplete and hints.
Status	Enable or disable the mailer.
Show this template ...	If selected, this mailer will be available for selection in the **Mail Blast** dialog for datasets.
Keep Mailing History	If selected, all notifications sent from this mailer will be recorded in the history log.

4. Select the **Recipients** of the mailer:
    - **User**: The user who created the entry data.
    - **Approver**: The approver set in the process Tier.
    - **Admin**: Admin of the form.
    - **Extra**: Any additional recipients. You may also use value placeholders.
5. Once all configurations are complete, click the **Save Mailer** button.
6. You should now see a preview of the mailer along with its details.

Tips

- Use descriptive mailer names and subjects for easier identification.
- Test value placeholders in the preview to ensure correct dynamic content.

Warning

- Ensure recipients are correctly configured; incorrect settings may result in notifications being sent to unintended users.
- Disabling a mailer will prevent it from sending any notifications until re-enabled.

Edit an Existing Mailer

1. In **Mailer Manager**, select the mailer you wish to edit from the side menu.
2. On the **Mailer** page, click the **Edit** button located at the top-right corner.
3. In the **Edit Mailer** dialog, update the details as required.
4. Once all changes are made, click the **Save Mailer** button to apply the updates.

Tips

- Select **Form** from the hint selector (top-right corner of the content editor) to enable placeholder autocomplete and hints.
- Verify that any dynamic placeholders in the content are still valid after editing.
- Check the recipient settings to ensure notifications are sent to the correct users.

View Mailer History

1. On the **Mailer** page, click the **Notification List** button located next to the **Edit** button in the top toolbar.
2. In the **Notification List** dialog, you can filter the entries by typing keywords into the search input field.
3. Once you have finished reviewing, click the **Close** button to dismiss the dialog.

Tips

- Use specific keywords or filters (e.g., recipient email, date range, or subject) to quickly locate relevant notifications.
- Regularly reviewing mailer history can help audit notifications and identify any delivery issues.

Warning

- Only notifications sent while **Keep Mailing History** is enabled will be available in the history log.
- Ensure sensitive information is handled appropriately when reviewing mailer history.

Schedule a Mailer

1. In **Mailer Manager**, click the **Create Schedule** button from the side menu.
2. In the **Add Scheduler** dialog, enter the following details:

Field	Description
Schedule Name	Name of the scheduler.
Frequency	Choose how often the scheduler should run (e.g., daily, weekly, monthly).
Hour in Day / Day of Month / Month of Year	Configure the specific time and date for the scheduler to execute.
Select Dataset	Choose the dataset that will be queried for sending notifications.
Select Mailer	Select the mailer to be used for sending notifications.
Status	Enable or disable this scheduled mailer.

3. Once all configurations are complete, click the **Save Schedule** button.

Note

- Scheduled mailers **will not run in DEV mode**.

Tips

- Use descriptive schedule names to easily identify the purpose and frequency of each scheduler.
- Verify the dataset and mailer selections before saving to ensure notifications are sent to the intended recipients.

Warning

- Disabling a scheduler will prevent notifications from being sent until re-enabled.

Remove a Mailer

1. Navigate to **Mailer Manager**.
2. Select the mailer you wish to remove from the side menu.
3. On the **Mailer** page, click the **Remove Mailer** button located at the top-right corner beside the **Edit** button.
4. In the **Remove Mailer** dialog, click the **Remove Mailer** button to confirm the action.

⚠ **Warning**

- This action is **irreversible**. Once removed, the mailer and all its configurations cannot be recovered.
- It is strongly recommended to create a **Restore Point** before removing the mailer.
- Ensure that no ongoing workflows or scheduled notifications depend on this mailer before deletion.

Endpoint Management

Add a New Inbound Endpoint

1. Navigate to **Endpoint Manager**.
2. Click the **Create Endpoint** button.
3. In the **Add Endpoint** modal dialog, enter the following details:

Field	Description
Endpoint Name	Name of this endpoint.
Code	Unique code for the endpoint. Ensure the code is available; if not, modify it accordingly.
Description (optional)	Optional description for the endpoint.
Request Method Type	HTTP method used by the endpoint (e.g., **POST** or **GET**).
Endpoint URL	URL of the endpoint. You can include parameter placeholders using {param}.
Authenticate	Select if the endpoint requires authentication. Supports **OAuth2** and **OIDC** protocols. Provide required credentials (e.g., client ID, client secret).
Response Type	Select the expected response type: **JSON**, **As-is**, or **Byte Array**.
HTTP Headers	Optional custom headers required by the endpoint.
Creator	Email(s) of creators authorized to edit or run this endpoint. Separate multiple emails with commas.

4. Once all details are configured, click the **Save Endpoint** button.

Tips

- Use descriptive names and codes to easily identify endpoints.
- For parameterized URLs, ensure placeholder names match expected variable names in the request.
- Verify authentication settings if the endpoint requires secure access.

Warning

- Incorrect HTTP method or response type may cause the endpoint to fail.
- Ensure that only authorized users are listed in the Creator field to prevent unauthorized access to the endpoint settings, especially when the endpoint contains sensitive authentication details.

Testing Endpoint Request/Response

1. To test the endpoint, click the **Run** button located at the top of the endpoint page.
2. If the endpoint requires parameter values, a dialog will prompt you to enter the parameters. Provide the required values and click **Execute Request**.
3. The response from the endpoint will be displayed at the bottom of the page.

Tips

- For **JSON** responses, you can view a collapsible JSON tree by selecting **Parsed** at the top-right corner of the response section.

Warning

- Ensure parameter values and authentication settings are correct to avoid errors during testing.

Edit Existing Endpoint

1. Navigate to **Endpoint Manager**.
2. Select the endpoint you wish to edit.
3. Click the **Edit Endpoint** button located on the top toolbar of the endpoint page.
4. In the **Edit Endpoint** dialog, update the details as required.
5. Once all changes are made, click the **Save Endpoint** button to save the updates.

⚠ **Warning**

- Only users listed in the **Creator** field are authorized to update the endpoint. Unauthorized users cannot make changes.

Tips

- Verify all endpoint parameters, authentication settings, and response types before saving changes to prevent disruption of dependent processes.

Remove Endpoint

1. On the endpoint page, click the **Delete** button located on the top toolbar beside the **Edit** button.
2. In the **Remove Endpoint** dialog, click the **Remove Endpoint** button to confirm the removal.

⚠ **Warning**

- This action is **irreversible**. Once removed, the endpoint and its configuration cannot be recovered.
- Only users listed in the **Creator** field are authorized to remove the endpoint.

Tips

- Consider exporting or documenting endpoint configurations before removal for future reference.
- Ensure that no active processes depend on this endpoint before deletion.

User Group

Create User Group

Steps

1. Navigate to **App Designer > Role Manager**.
2. Click on the **Create Group** button.
3. In the **Add Group** modal dialog, provide the following details:

Field	**Description**
Group Name	The name of the User Group.
Group Description *(optional)*	A short description of the group.
Allow users to register for this role	If enabled, users can select and enroll in this User Group during signup. ⚠ *This option requires the setting* ***App Properties > Advanced > New users must register...*** *to be enabled first.*
Access to edit ...	Select the User Group(s) authorized to manage this User Group.

4. Once completed, click the **Save Group** button to create the group and close the dialog.

💡 **Tip**

- Defining clear descriptions and access rules for each User Group helps maintain better role organization and prevents misconfiguration.

Edit Existing User Group Properties

Steps

1. Navigate to **App Designer > Role Manager**.
2. From the side menu, select the **User Group** you wish to update.
3. Click on the **Edit Group** button located in the top-right corner of the group page.
4. In the **Edit Group** dialog, update the relevant details as needed:

Field	**Description**
Group Name	Update the User Group's name if necessary.
Group Description *(optional)*	Modify the description to reflect updated purpose or scope.
Allow users to register for this role	Enable/disable user self-enrollment during signup. ⚠️ *This requires the* ***App Properties > Advanced > New users must register...*** *option to be enabled.*
Access to edit ...	Update which User Groups are authorized to manage this User Group.

5. Once finished, click the **Save Group** button to apply changes and close the dialog.

📌 **Note**

- Changes to a User Group may immediately affect user access rights and role availability within the application.

Remove User Group

Steps

1. Navigate to **App Designer > Role Manager**.
2. From the side menu, select the **User Group** you wish to remove.
3. Click on the **Remove Group** button, located at the top-right corner of the group page (beside the **Edit Group** button).
4. In the **Remove Group** dialog, click on the **Remove Group** button again to confirm the deletion.

⚠ **Warning**

- Removing a User Group is **permanent** and cannot be undone.
- All users associated with this group will immediately lose access rights and permissions granted through the group.
- Ensure you have reassigned affected users to other groups before proceeding.

Add User to a User Group

Steps

1. Navigate to **App Designer > Role Manager**.
2. Select the **User Group** you want to add the user into.
3. Click on the **Add User** button located at the top-right corner.
4. In the **Add User Access** modal dialog, provide the following details:

Field	Description
Email	The email address used by the user to access the application.
Name	The name of the user. This is a temporary value and will be replaced by the information retrieved from the login provider.
Register many users at once *(optional)*	Enable this option to add multiple users simultaneously. Enter their email addresses in the **Email List** field, separated by commas.
Requested User Group	Select the User Group that will be assigned to the user.

5. Once all details are provided, click on **Save User Access** to finalize the addition.

Note

- When adding multiple users at once, ensure that all email addresses are valid and comma-separated.
- User names will automatically update upon first login with the info from their authentication provider.

Remove User from a User Group

1. Navigate to **App Designer > Role Manager**.
2. From the side menu, select the **User Group** that you wish to manage.
3. In the **User List**, locate the user you intend to remove. You may also use the **Filter toolbar** 🔍 to quickly search for the user.
4. Click on the **Remove User** button 🗑 corresponding to that user.
5. In the **Remove User Access** dialog, click on the **Remove User** button to confirm and finalize the removal.

⚠ **Warning**

- Removing a user from a User Group will immediately revoke all access permissions granted by that group. Ensure that the user does not require any functionality associated with this group before proceeding.

📌 **Note**

- To remove multiple users at once, select the desired users using the checkboxes ☑ in the leftmost column of the user list.
- Once users are selected, click the 🗑 **Remove User** button at the bottom of the list to perform bulk removal.

Change User's Login Provider

1. Navigate to **App Designer > Role Manager**.
2. From the side menu, select the **User Group** that you want to manage.
3. In the **User List**, click on the ✏ **Edit User** button in the action column for the user you wish to update.
4. In the **Update User Info** dialog, update the **Provider** field with the desired login provider.
5. Once completed, click on the 💾 **Save User** button to apply and confirm the changes.

⚠ **Warning**

- Changing a user's login provider may affect their ability to access the application. Ensure that the user has an active account with the new provider before making this change.

User Group Access Request Approval

1. Navigate to **App Designer > Role Manager**.
2. From the side menu, select the **User Group** you want to manage.
3. In the **User List**, locate the pending access request.
    - Pending requests are highlighted with a **light blue background** for quick identification.
4. In the action column, click the ☑ **Approve** button for the corresponding user.
5. In the **Group Request Approval** dialog, set the **Status** field to **Approved**.
6. Once completed, click on the 💾 **Save User** button to confirm the approval and update the request status.

💡 **Tip**

- Use the filter options in the toolbar to quickly locate pending requests if the list of users is extensive.

⚠ **Warning**

- Approving a user's access request grants them the permissions defined for the User Group. Ensure that the request is valid and properly authorized before proceeding.

Bucket

Create a New Bucket

1. Navigate to **App Designer > Bucket Manager**.
2. Click on the **Create Bucket** button.
3. In the **Add Bucket** modal dialog, provide the following details:

Field	Description
Bucket Name	The name of the Bucket.
Bucket Description *(optional)*	A description of the Bucket.
Anti-virus Scan on Upload *(optional)*	If enabled, every file uploaded to this Bucket will be scanned immediately for viruses and malware.
Scheduled Anti-virus Scanning *(optional)*	Configure a recurring scan for all files stored in the Bucket. Useful for ongoing security checks.

4. Once finished, click on the 💾 **Save Bucket** button to create the Bucket.

📌 **Note**

- Buckets are secure storage containers that may include antivirus protection. Proper configuration ensures both efficiency and system safety.

💡 **Tip**

There are **two recommended antivirus strategies** depending on your app's workload:

- **Scan on Upload** 🔍: Files are scanned immediately upon upload. This is suitable for applications with lower file upload frequency.
- **Scheduled Scanning** ⏰: Files are scanned at scheduled intervals, typically during off-peak hours. This is ideal for applications with high-volume file uploads, as it reduces server load during peak usage times.

Edit Existing Bucket Details

You can update an existing Bucket's configuration, such as its **name**, **description**, or **antivirus scanning settings**.

1. Navigate to **App Designer > Bucket Manager**.
2. From the side menu, select the **Bucket** you wish to update.
3. On the Bucket page, click the ✏️ **Edit Bucket** button located at the top-right corner.
4. In the **Edit Bucket** dialog, modify the details you want to update (e.g., Bucket Name, Description, Antivirus Scan options).
5. Once finished, click on the 💾 **Save Bucket** button to apply the changes.

⚠️ **Warning**

- Updating antivirus scan settings may impact server performance. For high-traffic applications, consider scheduling antivirus scans during off-peak hours instead of enabling real-time scanning.

Download Bucket Files as ZIP

This action will compress all files within a selected Bucket into a **.zip** archive for download.

1. Navigate to **App Designer > Bucket Manager**.

2. From the side menu, select the **Bucket** you want to download.
3. Click the **More Actions** button (⁝) at the top-right corner.
4. From the dropdown menu, select **Initialize ZIP**.
5. The system will begin archiving the files. This process may take some time depending on the **Bucket size**.
6. Once the process is complete, the **Bucket ZIP** dialog will appear.
7. Click the **Download ZIP** button to save the archive to your browser's default download directory.

⚠ **Warning**

- Archiving large Buckets may take significantly longer and could impact system performance during the process. It is recommended to perform this action during **off-peak hours** for heavy Buckets.

View Bucket Statistics

This action displays detailed statistics of the selected Bucket, including uploaded files categorized by **file types** and **form fields**.

1. Navigate to **App Designer > Bucket Manager**.
2. From the side menu, select the **Bucket** you want to analyze.
3. Click the **More Actions** button (⁝) at the top-right corner.
4. From the dropdown menu, select **Bucket Statistics**.
5. The **In This Bucket** dialog will appear, showing the statistical breakdown of files in the Bucket.
6. Click the ✖ **Close** button to dismiss the dialog.

Note

- Bucket statistics provide a quick overview of storage distribution. Use these insights to monitor file growth and manage capacity efficiently.

Reorganize Bucket Files

This action reorganizes previously uploaded files into the selected Bucket if they were uploaded without proper Bucket assignment.

1. Navigate to **App Designer > Bucket Manager**.
2. From the side menu, select the **Bucket** you want to reorganize.
3. Click the **More Actions** button (⁝) at the top-right corner.
4. From the dropdown menu, select **Reorganize Bucket Files**.
5. A confirmation dialog will appear. Click ☑ **OK** to proceed.
6. The reorganization process may take some time, depending on the number of files. Once completed, a notification will appear as a **toaster message**.

⚠ **Warning**

- Large Buckets with many unassigned files may take longer to process. During reorganization, avoid performing other intensive Bucket operations to ensure smooth execution.

Upload a New File into a Bucket

Follow these steps to upload a file into the selected Bucket:

1. Navigate to **App Designer > Bucket Manager**.
2. Click the **Upload File** button located at the **top-right corner** of the page.
3. In the file browser dialog, select the file(s) you want to upload.
4. Click **Open** to begin the upload process.
5. Once the upload is complete, the file will appear in the **Bucket's file list**.

⚠ **Warning**

- Ensure the file type and size comply with the system's restrictions; otherwise, the upload may fail.

Remove File from a Bucket

To delete a file from a bucket, follow the steps below:

1. Navigate to **App Designer > Bucket Manager**.
2. From the side menu, select the **Bucket** where the file is stored.
3. Locate the file in the **Bucket File List**.
4. In the corresponding row, click the **Remove File** button (located in the **right-most column**).
5. In the **Remove File** confirmation dialog, click **Remove File** again to confirm the deletion.

📌 **Notes**

- Removing a file from the Bucket will **not automatically update or remove** the file URL referenced in any associated form entries. Ensure that linked forms or records are updated as needed.

⚠ **Warning**

- This action is **irreversible**.

Lambda

Create a New Lambda

Follow the steps below to create a new Lambda function:

1. Navigate to **App Designer > Lambda Manager**.
2. Click the **Create Lambda** button.
3. In the **Add Lambda** dialog, provide the following details:

Field	Description
Lambda Name	Enter a unique name for the Lambda.
Description *(optional)*	Provide a brief description of the Lambda's purpose.
Language	Select the scripting language (e.g., JavaScript).
Bindings *(optional)*	Specify any bindings to be used by the Lambda.
Public Lambda *(optional)*	Enable this option to allow the Lambda to be accessed without authentication.
Scheduled Run *(optional)*	Enable this if the Lambda should run automatically via scheduler. Configure **Frequency** and **Time**.
Lambda Path	Define the endpoint path for accessing the Lambda. Ensure the path is unique. If unavailable, provide an alternative path.
Creator	Enter the email address(es) of authorized users who can edit and run the Lambda (comma-separated).

4. Once all details are completed, click **Save Lambda** to create the function.

⚠ **Warning**

- Making a Lambda **public** will expose it to unauthenticated access. Enable this only if it is safe to do so.
- Ensure that the **Lambda Path** is unique to prevent conflicts with existing Lambdas

Test a Lambda Script

1. In the **Lambda Editor**, enter the following code example:
```
print("Hello World");
```
2. To test the script, click the ▶ **Run** button in the toolbar at the top of the editor.
3. The **output result** will be displayed in the console area at the bottom of the editor.

Tip

- Start with simple print statements to verify your Lambda setup before implementing more complex logic.

Edit Existing Lambda

1. Navigate to **Lambda Manager**.
2. Select the Lambda you want to edit from the **side menu**.
3. Click on the **Edit Lambda** button in the toolbar at the top of the Lambda editor.
4. In the **Edit Lambda** modal dialog, update the details that you wish to modify.
5. Once finished, click on the **Save Lambda** button to save the changes.

Notes

- Only creators listed in the **Creator** field are permitted to update the Lambda.
- Use the same edit procedure to **add or remove bindings** as required.
- Modifying a Lambda may affect workflows or applications that depend on it; verify dependencies before saving changes.

Remove a Lambda

1. Navigate to **Lambda Manager**.
2. From the side menu, select the **Lambda** you want to remove.
3. Click the **Remove Lambda** button in the toolbar above the editor.
4. In the **Remove Lambda** confirmation dialog, click **Remove Lambda** again to finalize the deletion.

Warning

- Removing a Lambda is permanent and cannot be undone. Ensure you no longer need the Lambda before confirming deletion.

Evict Lambda Cache for /cache

1. Navigate to **Lambda Manager**.
2. From the side menu, select the **Lambda** whose cache you want to clear.
3. Click on the **Link Lambda** button in the toolbar.
4. At the bottom of the dropdown menu, click **Evict Cache** (red button) to clear the cache for /cache.

Tip

- Use cache eviction when your Lambda has been updated but cached results are still being served.

Secrets

You can use **Secret** to store confidential and sensitive data for use in Lambda. Secrets are stored as **key–value** records and are securely injected at runtime. Secret values are never displayed outside Lambda execution.

Secret can be used on any field that shows Key icon 🔑

Create a New Secret

1. Navigate to **App Designer > Lambda Manager**.
2. Click on the **Manage Secret** button from the side menu.
3. Click on the **Create New Secret** button.
4. In the **Add Secret** modal dialog, provide the following details:

Field	Description
Key	Unique identifier for the secret.
Value	The confidential value to be stored securely.
Enabled	Either to enable or disabled this secret

5. Once finished, click on the 💾 **Save Secret** button.

📌 **Notes**

- The secret value cannot be viewed after saving.
- To change the value, the secret must be updated.

Edit a Secret

1. Navigate to **App Designer > Lambda Manager**.
2. Click on the **Manage Secret** button from the side menu.
3. From the Secret list, click the **Edit** button for the secret you want to update.
4. In the **Edit Secret** modal dialog, update the required fields.
5. Once finished, click on the 💾 **Save Secret** button.

📌 **Notes**

- The existing value is not shown.
- Saving will overwrite the previous value.

Remove a Secret

1. Navigate to **App Designer > Lambda Manager**.
2. Click on the **Manage Secret** button from the side menu.
3. From the Secret list, click the **Remove** button for the secret you want to delete.
4. Click **Confirm Remove** when prompted.

📌 **Notes**

- Removing a secret will affect any Lambda that depends on it.
- This action cannot be undone.

Use Secret in Lambda

1. Edit the target Lambda.
2. Add **Secret** in the **Bindings** section.
3. In the Lambda script, access the secret using the secret object.
    - Autocomplete will list available secret keys when typing secret or the key name.

Notes

- Secrets are injected at runtime and are read-only inside Lambda.
- Secret values are not exposed unless explicitly returned or logged.

Use Secret for API Key in Cogna

1. Edit the target **Cogna**.
2. In the **Inference API Key** or **Embedding API Key** field, enter:
   {{_secret.<secret-key>}}

Notes

- The API Key field will show available secrets as **auto-complete suggestions** if the Secret is properly defined and accessible.

Use Secret for URL (Endpoint or RESTful Lookup)

1. Edit the target **Endpoint** or **Lookup**.
2. In the **Endpoint URL** (for Endpoint) or **RESTful Endpoint** (for lookup) field, enter the URL. You can use Secret in the URL by using {_secret.<secret-key>}.

Use Secret for authentication client secret (Endpoint or RESTful Lookup)

1. Edit the target **Endpoint** or **Lookup**.
2. In the **Client Secret** field field (for authenticated RESTful request), enter:
   {{_secret.<secret-key>}}

Notes

- The API Key field will show available secrets as **auto-complete suggestions** if the Secret is properly defined and accessible.

Use Secret for Private Key in Krypta

1. Edit the target **Wallet** in **Krypta Manager**.
2. In the **Private Key** field, enter:
   {{_secret.<secret-key>}}

Notes

- The Private Key field will show available secrets as **auto-complete suggestions** if the Secret is properly defined and accessible.

Cogna

Create a New Cogna

1. Navigate to **Cogna Manager**.
2. In the side menu, click on the ➕ **Create Cogna** button.
3. In the **Add Cogna** modal dialog, provide the following details:

Field	Description
Cogna Name	Enter the name of the Cogna.
Description (optional)	Provide a concise description of the Cogna.
Used To	Select the intended purpose of the Cogna: • **Generate Text** – typically used for standard LLM text generation tasks. • **Classify Text** – classify text using a Lookup model. • **Extract Data** – extract structured data from text or uploaded images. • **Generate Image** – generate images using AI models. • **Classify Image** – classify uploaded images with an image classification model.
Public Cogna	Enable this option to make the Cogna endpoint publicly accessible without authentication.
Cogna Path	Define the URL path for the Cogna. Ensure that the path is unique and available. If the specified path is unavailable, adjust it accordingly.
Creator	Provide one or more authorized editor email addresses (comma-separated). These users will be permitted to edit and run this Cogna.

4. (Optional) Configure **Embedding Settings** in the *Embedding* section.
5. Configure **General Inference Settings** in the *Inference* tab.
6. Adjust **RAG (Retrieval-Augmented Generation) Settings** in the *Retrieval Augmentation* section.
7. Select and configure the **Vector Database** in the *Vector Dataset* section.
8. Once all required details are completed, click on the 💾 **Save Cogna** button.

Test Cogna Prompt

1. In the **Cogna Preview** panel, type your desired prompt into the input field.
2. Press **Enter** ↵ to execute the prompt.
3. The response generated by the Cogna will appear in the **Preview Output** section.

💡 **Tip**

- For best results, start with simple prompts and gradually refine them to observe how the Cogna responds.

⚠ **Warning**

- If your Cogna uses external APIs, repeated testing may consume credits or resources.

Edit Existing Cogna

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to edit.
3. Click the **Edit Cogna** [icon: pencil] button in the toolbar at the top of the Cogna panel.
4. In the **Edit Cogna** modal dialog, update the details you wish to modify.
5. Once completed, click the 💾 **Save Cogna** button to save the changes.

📌 **Note**

- Only users listed in the **Creator** field have permission to edit a Cogna.

⚠ **Warning**

- Ensure all critical settings are reviewed before saving, as incorrect configurations may affect downstream knowledge ingestion and processing.

Add Knowledge Source in Cogna

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to manage.
3. In the **Sources** panel, click the **+ Add Source** button.
4. In the **Add Knowledge Source** modal dialog, enter the following details:

Field	Description
Source Type	Specify where to retrieve the knowledge source data.
Dataset > Select Dataset	Choose the dataset from which to query the data.
Dataset > Sentence Template	Provide a template to construct meaningful sentences from the dataset.
Bucket > Select Bucket	Select the bucket containing files to be ingested into the vector database.
Website > Web URL	Enter the URL of the website to retrieve and ingest data from.
Scheduled Run	Enable this to schedule the ingestion process. Configure frequency and time for the schedule.

5. Once completed, click the 💾**Save Source** button to confirm.

📌 **Note**

- Newly added knowledge sources are **not automatically ingested**. Refer to the **Ingest Knowledge Source into Vector DB** section.
- You can add **multiple knowledge sources** from different source types into a single Cogna for comprehensive knowledge coverage.

⚠ **Warning**

- Ensure that dataset and website sources are correctly configured before ingestion to avoid errors or incomplete data.

Ingest Knowledge Source into Vector DB

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to manage.
3. In the **Sources** panel, click on the **Ingest** button at the top right corner.

4. Once completed, a message **“Document successfully ingested”** will be displayed at the bottom of the **Sources** panel.

💡 **Tips**

- For **Bucket** source type, only files that have **not been ingested yet** will be processed.
- Experiment with different **embedding settings** (chunk length and overlap) to fine-tune results depending on the source content.

⚠ **Warning**

- For **Website** source type, ensure the URL returns actual content. Some websites may return only a JavaScript loader, which does not contain the actual content and cannot be ingested correctly.

Add Tools in Cogna

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to edit.
3. Click the **+ Add Tool** button in the **Tools** panel.
4. In the **Add Tool** modal dialog, provide the following details:

Field	**Description**
Tool Name	The name of the tool.
Tool Enabled	Enable or disable this tool.
Description	Provide a clear description of the tool.
Select Lambda	Choose the Lambda function that will be triggered when the tool is executed.
Tool Parameter	Specify the parameters to extract from the prompt and pass to the Lambda. Enter **Parameter Key** and **Parameter Description**. Multiple parameters can be defined if needed. These parameters can be accessed in the Lambda via _param.<parameter_key>.

5. Once completed, click **+ Save Tool** to save the tool.

💡 **Tips**

- Clearly describe the tool so it can be accurately selected in prompts.
- For tools with parameters, provide precise descriptions to ensure inputs are correctly extracted and passed to the Lambda.

⚠ **Warning**

- Inaccurate or vague descriptions may lead to incorrect tool selection or parameter mapping during execution.

Register Remote MCP Server

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to edit.
3. Click the **+ Add MCP Server** button in the **Model Context Protocol (MCP)** panel.
4. In the **Add MCP Server** modal dialog, provide the following details:

Field	**Description**
Server Name	The name of the MCP server.
SSE URL	The SSE URL of the MCP server.
Timeout	MCP request timeout in seconds.

5. Once completed, click **+ Save MCP Server** to save the configuration.

💡 **Tips**

- Ensure the MCP server is publicly accessible or allows an API key that can be passed via the URL.
- The MCP server must support the SSE (Server-Sent Events) transport protocol.

⚠ **Warning**

- If the server is not public or the SSE protocol is not supported, the Cogna may fail to communicate with the MCP server.

Clear Vector DB

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to edit.
3. In the **Vector Store/DB** panel, click the **Clear** button.
4. In the confirmation prompt, click **OK** to confirm the removal of all vector data.

⚠ **Warning**

- This action is **irreversible**. Once cleared, all existing vector data will be permanently deleted.
- After clearing, you must **re-ingest the knowledge sources** to repopulate the vector collection.
- This action is useful when experimenting with **different embedding settings** to optimize vector representations.

Clear Cogna Memory

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to manage.
3. Click on the **Clear Memory** button located at the top right corner of the page.
4. In the prompt, choose one of the following options:
   - **Clear memory for the current user**
   - **Clear memory for all users**
5. A notification will appear once the memory has been successfully cleared.

💡 **Tip**

- Use this feature to reset the conversation context or internal memory of the Cogna, particularly when testing or debugging responses.

⚠ **Warning**

- Clearing memory for all users will erase all session data stored by the Cogna and may affect ongoing interactions.

Reinitialize Cogna Model

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to manage.
3. Click on the 🔄 **Reinitialize Model** button.

💡 **Tip**

- Reinitializing does not affect the underlying knowledge sources, but it will refresh the model's internal state and behavior based on the updated configuration.

⚠ **Warning**

- It is recommended to reinitialize the model whenever changes are made to the Cogna properties to ensure that the updates are properly applied.

Open Vector DB Query

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to manage.
3. Click on the **Vector DB Query** button.
4. In the **Vector DB Query** modal dialog, specify the following:
   - **Max Result**: Maximum number of results to retrieve.
   - **Min Score**: Minimum similarity score threshold for results.
   - **Search Text**: Enter the text to query the vector database.
5. Click on the **Submit** button.
6. The query results will be displayed below the parameter input fields.

Tips

- By default, the query dialog will populate fields with the current Cogna settings and the last prompt text used in preview.
- Use this feature to validate and fine-tune your embedding settings by checking the query results directly from the vector database.

Warning

- The results shown in the Vector DB query may differ from the final response returned by the LLM, as the LLM can prioritize and interpret data differently.

View Cogna Chat History

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to view.
3. Click on the **Chat History** button in the Cogna toolbar.
4. In the **View Chat History** modal dialog, you can apply filters to refine the chat records.
5. You can also export the chat history to a **CSV file** for offline analysis.
6. Once finished, click the **Close** button to dismiss the dialog.

Tips

- Use filters to quickly locate specific chat interactions.
- Exported CSV files can be used for reporting, auditing, or troubleshooting purposes.

Warning

- Ensure that sensitive information is handled appropriately when exporting chat history to external files.

Remove Cogna

1. Navigate to **App Designer > Cogna Manager**.
2. From the side menu, select the **Cogna** you want to remove.
3. Click on the **Remove Cogna** button.
4. In the **Remove Cogna** modal dialog, click the **Remove Cogna** button to confirm the removal.

Warning

- This action is **irreversible**.
- It is recommended to create a **restore point** before removing a Cogna.

Krypta

Create Smart Contract

1. Navigate to **Krypta Manager**.
2. Click the **+ Create Contract** button in the **Smart Contracts** panel.
3. In the **Contract Editor** modal dialog, provide the following details:

Field	Description
Contract Name	The name of the smart contract.
Description	(Optional) Description of the contract purpose.
Solidity Code	Paste your Solidity source code into the code editor.

4. Once completed, click **+ Save Contract** to save the contract.

Compile Smart Contract

1. Navigate to **Krypta Manager**.
2. Under the **Smart Contracts** section, click the contract you want to compile.
3. Click the **Compile Contract** button.
4. Once compilation is complete, the paths to the generated **ABI** and **BIN** files will be displayed.

💡 **Tip**

- Ensure your Solidity code matches the supported compiler version.

Register a Wallet

1. Navigate to **Krypta Manager**.
2. Click the **+ Create Wallet** button in the **Wallets** panel.
3. In the **Add Wallet Info** modal dialog, provide the following details:

Field	Description
Wallet Name	The name of the wallet.
Description	(Optional) Description of the wallet usage.
RPC URL	The RPC endpoint of the EVM-compatible network.
Chain ID	The unique chain identifier of the target network.
Private Key	The private key of your wallet account. (Use Secret!)
Smart Contract	Select the smart contract to interact with.

4. Once completed, click **+ Save Wallet** to save the wallet configuration.

💡 **Tip**

- Use test networks (e.g., Sepolia, BNB Testnet) during development to avoid real token costs.
- It is **recommended** to use Secret to store Private Key

⚠ **Warning**

- Keep your **Private Key** confidential. Exposure may result in permanent loss of assets.

Deploy Smart Contract

1. Navigate to **Krypta Manager**.
2. Select the **Wallet** from the left sidebar.

3. In the **Wallet Info** section, click **Deploy Contract**.
4. Once deployment is complete, the **Contract Address** will appear under the wallet details.

Note

- Each time you redeploy a contract, a **new contract address** will be assigned.

Test Smart Contract Functions

1. Navigate to **Krypta Manager**.
2. Select the **Wallet** from the left sidebar.
3. In the **Contract Functions** panel, click the function you wish to run.
4. If the function requires input, enter the parameters when prompted.
5. Click **Run <functionName>** to execute.
6. Once successful, the result or transaction hash will appear in the **Result** section.

Note

- For functions that write to blockchain (non-view), gas fees will apply.

Query Smart Contract Event Logs

1. Navigate to **Krypta Manager**.
2. Select the **Wallet** from the left sidebar.
3. In the **Contract Events** panel, click the event you want to view.
4. Once retrieved, the event logs will be displayed in the **Result** section.

Tip

- Use event logs to audit blockchain activity or trigger workflows in your app.

Verify Transaction Hash

1. Navigate to **Krypta Manager**.
2. Select the **Wallet** from the left sidebar.
3. Click **Verify Hash** under the **Wallet Info** section.
4. When prompted, enter the **Transaction Hash**, then click **OK**.
5. Once successful, the transaction details will appear in the **Result** section.

Tip

- Use blockchain explorers (e.g., Etherscan, BscScan) to cross-check transaction data.

Signa

Create a Digital Signature Info

1. Navigate to **Signa Manager**.
2. Click **+ Create Signature** from the side menu.
3. In the **Add Digital Signature** dialog, complete the following fields:

Field	Description
Signa Name	A descriptive name for the digital signature (e.g., *Director's Signature*).
Reason	Purpose of the signature (e.g., *Recruitment Offer Letter*).
Location	Physical or organizational location associated with the signature.
Subject Distinguished Name (DN)	The certificate subject in standard DN format, e.g., CN=Director, O=Company, C=MY. (Refer to IBM documentation for DN format.)
Password	Password used to protect and recover the private key.
Show Signature Stamp	Enable to display a visual signature stamp on the PDF.
Hash Algorithm	Hash algorithm to be used for signing (e.g., SHA-256, SHA-384, SHA-512).
Key Algorithm	Key algorithm to be used for signing (e.g., RSA, ECDSA).
Keystore File Format	Keystore format to store the private key (e.g., JKS, PKCS#12, BKS).

4. If **Show Signature Stamp** is enabled, configure the **coordinates and placement** of the signature stamp within the document.
5. Click **+ Save Signa** to save the digital signature profile.

📌 **Note**

- Recommended defaults: Hash Algorithm: SHA-256, Key Algorithm: RSA, Keystore Format: PKCS12

Generate Keystore (using self-signed certificate)

1. Navigate to **Signa Manager**.
2. Select the digital signature profile.
3. Click **Generate Keystore**.
4. Once generated, the keystore file name will be displayed (e.g. director_1767168749083.p12).

📌 **Note**

- A keystore must exist **before** you can download a CSR
- If you already have an externally generated keystore, you may skip this step and upload it instead (See Upload Keystore File section)

Download Certificate Signing Request (CSR)

1. Navigate to **Signa Manager**.

2. Select the digital signature profile.
3. Click **Download CSR** to download the .csr file.

📌 **Note**

- The **Download CSR** button is only available after a keystore has been generated.
  If not available, generate the keystore first (see *Generate Keystore* section).
- Submit the CSR to your CA to obtain a signed certificate.

Upload Keystore File

This step is applicable if the private key is generated externally.

1. Navigate to **Signa Manager**.
2. Select the digital signature profile.
3. Click **Upload Keystore File**.
4. Upload the keystore file.
5. Once uploaded, the file name will be displayed, indicating the private key has been successfully uploaded.

📌 **Note**

- Ensure the keystore format matches the profile configuration.
- The password must match the uploaded keystore.

Upload Signature Image

1. Navigate to **Signa Manager**.
2. Select the digital signature profile.
3. Click **Upload Signature Image**.
4. Upload the signature image file.
5. The uploaded image will be previewed upon successful upload.

📌 **Note**

- Recommended formats: PNG (transparent background) or JPG.
- The image is only visible if **Show Signature Stamp** is enabled.

Assign Digital Signature to Lambda

1. Navigate to **Lambda Manager**.
2. Select the Lambda function to be signed.
3. Click **Edit Lambda**.
4. In the **Edit Lambda** dialog, enable **Embed Digital Signature (PDF Output)**.
5. Select the desired digital signature from the dropdown list.
6. Click **+ Save Lambda** to apply the configuration.

📌 **Note**

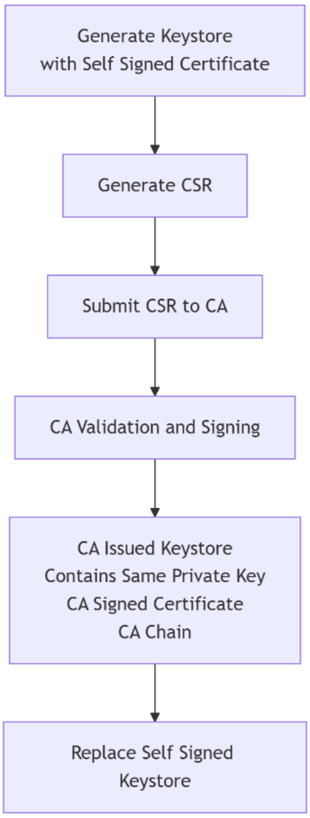
- Once configured, all PDFs generated via the Lambda /pdf endpoint will be digitally signed automatically.

What is Keystore (with self-signed certificate)

- Private key: Generated by you
- Certificate: Self-signed

What is CSR
- Public key: Generated from private key
- DN: Identity Information
- Signature: Signed using private key

CA-issued keystore
- Private key: same key
- Certificate: Replace with CA-signed
- CA Chain: Added



Import/Export App

Exporting App Metadata

1. Navigate to the **App Designer** page of the application you wish to export.
2. Click on the **App Summary** button located at the top-right corner of the Designer page.
3. In the **Summary Page**, click on the **Export Metadata** button.
4. A metadata file with the extension **.appmeta.json** will be automatically downloaded to your browser's default download directory.

📌 **Note**

- The exported appmeta.json file contains the complete metadata configuration of your app. Keep a backup copy before making major changes or transferring to another environment.

Importing App Metadata

1. Create a **blank App** (refer to the *Create New App* section).
2. Navigate to the **UI Editor**, then click on the **Import App Meta** button in the side menu.
3. In the **Import App Meta** dialog, click on the **Browse and Import** button.
4. Locate and select the previously exported **App Metadata (.appmeta.json) file**.
5. Once selected, click the **Open** button to proceed.
6. The application will now be automatically populated with components, configurations, and settings from the imported metadata.

⚠ **Warning**

- Importing App Metadata will overwrite the current configuration of the app. Ensure that you are importing into a **blank app** or that you have backed up any existing data before proceeding.

Import and Generate App from Microsoft Excel

1. Create a **blank App** (refer to the *Create New App* section).
2. Navigate to **App Designer > UI Editor**.
3. Click on the **Import from Excel** button in the side menu.
4. In the **Create App and Import Data** dialog, enable the following options:
    - ☑ **Create dataset automatically**
    - ☑ **Create dashboard automatically**
    - ☑ **Import to Live Data**
5. Click the **Browse and Import** button.
6. Locate and select the Microsoft Excel file you wish to import.
7. Once selected, click the **Open** button to upload the file.
8. An **import log message** will be displayed, summarizing the import process.
9. Once the process is complete, click on the **Done** button.
10. The system will automatically generate components based on the imported Excel data.

📌 **Note**

- This operation will not only generate datasets, dashboards, and UI components, but also **import the entry data** contained in the Excel file.

Excel File Requirements for Import

When importing from Microsoft Excel, the system can automatically generate **forms**, **datasets**, **dashboards**, and also **import entry data**.

To ensure successful import, the Excel file must comply with the following requirements:

Requirement	Description
Normalized Tabular Dataset	The Excel file should contain properly structured tabular data without merged cells or inconsistent data types.
Multiple Worksheets	Each worksheet will be imported as a different group.
Header Row	The first row of each worksheet must contain the field headers.
Worksheet Title	REKA will use the worksheet name as the title.

Field Code Extensions

You can enhance field configurations by appending **suffixes** to the field codes:

Field Type	Field Code Format	Example
Simple Option Field	fieldName:simpleOption	status:simpleOption
Lookup Field	fieldName:code,name	category:code,name
Model Field	fieldName:[modelFieldCode]	user:[userId]
JSON Field	fieldName:json	metadata:json

Special Reserved Fields

Field Code	Purpose
_:email	Specifies the entry owner's email. If not provided, the uploader's email will be used by default.
_:current_status	Specifies the entry's current status.

⚠ **Warning**

- If the Excel file does not follow the above structure (e.g., missing headers, invalid field codes, or inconsistent formatting), the import may fail or produce unexpected results.

💡 **Tips**

- Keep your worksheet names meaningful (e.g., Employees, Products, Projects) as they will be used as group titles.
- For lookup fields, ensure the referenced dataset or values already exist in the system for accurate mapping.
- Validate the Excel data before import to avoid duplicated or corrupted entries.

Restore Point

Create a New Restore Point

1. Navigate to **App Designer > UI Editor**.
2. In the side menu, click on the **Restore Points** button.
3. On the **Restore Points** page, click **Create New Restore Point**.
4. In the modal dialog, enter a descriptive **Restore Point Name**.
5. Click on the **Create Restore Point** button to confirm.
6. The newly created restore point will appear in the **Restore Points list**.

Tip

- Use meaningful names for restore points (e.g., *Before Major Update*, *Post-UI Changes*) to easily identify and manage them later.

Warning

- Creating too many restore points may increase storage usage. Regularly review and remove obsolete restore points to maintain system efficiency.

Restore an App to a Restore Point

1. Navigate to **App Designer > UI Editor**.
2. In the side menu, click on the **Restore Points** button.
3. From the **Restore Points list**, locate the restore point you want to revert to and click the **Restore** button next to it.
4. In the **Restore to ...** modal dialog, click **Confirm Restore** to proceed.

Tip

- Create a new restore point before performing a restore operation. This ensures you can revert back if needed.

Warning

- Restoring to a previous restore point will overwrite the current state of your app. Any unsaved changes made after that restore point will be lost.

Development: Issue Reporting & Discussions

Issue Reporting

Encountering a bug or unexpected behavior? We encourage you to report it so we can improve the platform.

1. **Check Existing Issues** – Before creating a new issue, review the Issue Tracker to see if the problem has already been reported or addressed.
2. **Create a New Issue** – If your issue is not listed, open a new issue and provide:
   - A clear and concise **title**.
   - A detailed **description** of the issue, including steps to reproduce it.
   - Relevant **screenshots, error messages, or logs** if available.
3. **Track Progress** – You can monitor the status of your issue directly in the Issue Tracker as it moves through review and resolution.

Submit or view issues here: GitHub Issue Tracker

Discussion

Have a question, idea, or suggestion about the platform? Join the conversation in our **GitHub Discussions** space:

- **Ask Questions** – Seek help from the community or maintainers.
- **Share Ideas** – Propose new features or improvements.
- **Engage with Others** – Collaborate with contributors and users.

Start or join discussions here: GitHub Discussions