

## Form Builder Inbox – Documentation v0.1

### Overview

Welcome to **FORM BUILDER CLOUD**! We provide you an intuitive and user friendly solution to manage your enterprise workflow in an efficient and organised manner. Below are some of the key aspects which are addressed using Form Builder Cloud:

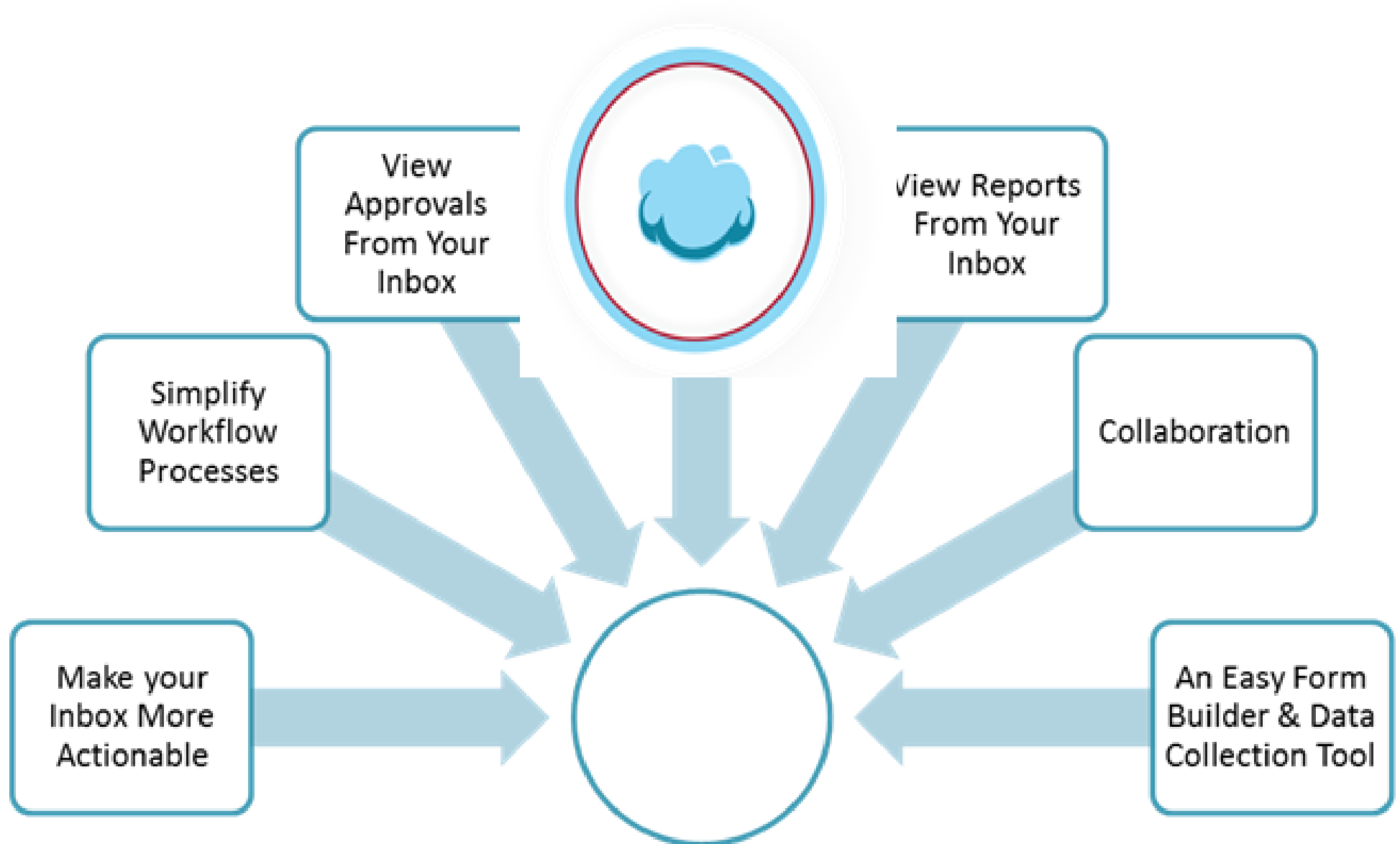
### Getting Started

Before you get started, please make sure that you have the valid credentials for accessing the Application. Below are some steps to quick start and use the Application:

#### Log into the Application

Create new “User” or “Group” through the User or Group Interface. Users can be given different Roles based on their privilege and designation in the Company.

- User can change the default drop down values in the Application
- User can modify their profile
- User can change their Password





One App Inbox Login

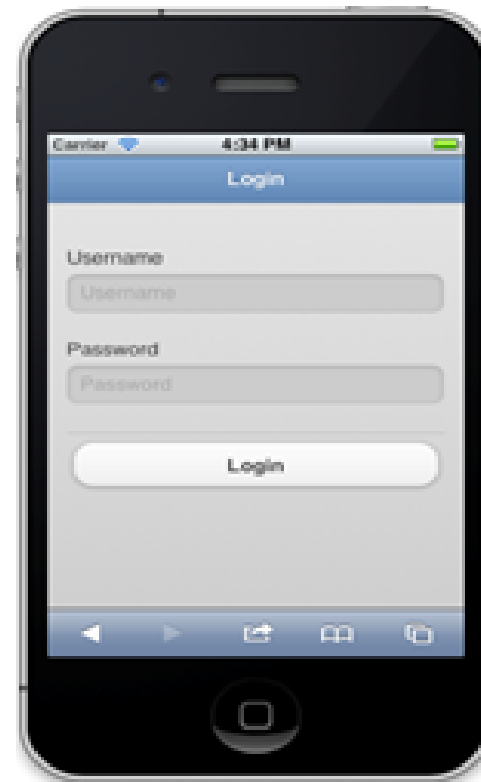
Enter your username and password

Username

Password

☐ Remember me

**HELP! [Forgot Password!](#) | [New User ?](#)**  
[Register](#)  
[Reset Your Password](#)



Carrier 4:34 PM

Login

Username

Password

## Form Builder

Create the Form (Internal or External) using Drag and Drop Interface.

**Note:** Internal forms are those which are used within the

Organization to streamline the process, whereas, the External forms are the once which are customer facing like Polls and Surveys.

Publish the Form and create the Form Admin

**Note:**

1. "Select Status Field" is the attribute which can be used by the approver to mark the status (like approve or reject) for the entry
2. "User changes not allowed for" is the attribute which can restrict the user to change the Status of the entry, once the chosen field is selected
3. "Publish" shows up the form on the left menu of the application

The screenshot displays the 'Create User' form in the Form Builder application. The form is divided into two sections: 'Basic' and 'Communication'. The 'Basic' section contains the following fields:

- Username: \* (text input)
- First Name: (text input)
- Last Name: (text input)
- Sub Org.: (text input with a dropdown arrow)
- Department: (text input with a dropdown arrow)

A dropdown menu is open, showing the following options:

- Users
- Drop Downs
- Profile
- Password
- Logout
- People
- Groups

The 'Welcome Jack' button is visible in the top right corner of the interface.

Share the Form

**Note:** The sharing can be Public or Password protected.

Form would look like this

**Form Builder Formula Calculator:** User can create a Formula

based on the fields of the Form. You can perform calculations on numbers and dates.

a. Scenario 1

The below mentioned formula calculates the difference between the two dates and adding 14 days to it:

## Master Form

The Master Form can be used to centrally store the Master data of the organization, which can be utilised by all the business processes

The screenshot displays the 'Form Builder' interface. On the left, there's a sidebar with 'Add Field' and 'Form Settings' tabs. Under 'Add Field', various field types are listed: Text, Number, Date, Time, Email, Password, Image, Video, Audio, File, and Location. The main area shows a 'Form 1' configuration. It includes a 'Title' field, a 'Subtitle' field, and a 'Content' area. The 'Content' area contains a video player titled 'What is Cloud Computing?' and a 'Radio Button' section with three options: 'First Radio', 'Second Radio', and 'Third Radio'. At the bottom, there are 'Save' and 'Cancel' buttons.

## Sub Form

The users can represent the data in the tabular or matrix format in a Form. This matrix or table is called Sub-Form. A sub-form is always tied to a Main Form.

## Look Up

User can pre-populate the data in the forms while creating an entry by mapping the Lookup field to the Master Form.

## Form Creation using

### Excel

User can import an Excel file data direct into the application. The Form will be created automatically and the respective data will also be imported

### Subscription

Navigate to the “Subscription” interface to create a Rule Set and the respective Rules for the entries made.

(Example: If the Employees raise a Leave request → It should go the Manager and when the Manager approves it → It should go the HR Department.)

➤ [Subscription Rules interface link](#)

### Edit Form Admin

**Details**

Form: Travel Request Authorization

Form Type: Approval

Select status field: Request Status

User changes not allowed for:

- Approved
- Rejected
- On Hold
- Archived

Open for editing: ☒

Published: ☒

Form Login: Login

Form Submit Message: Thanks for submitting

- Create a New Rule within the Rule Set
- The Rules list, which will get executed in the specified order

**Note:**

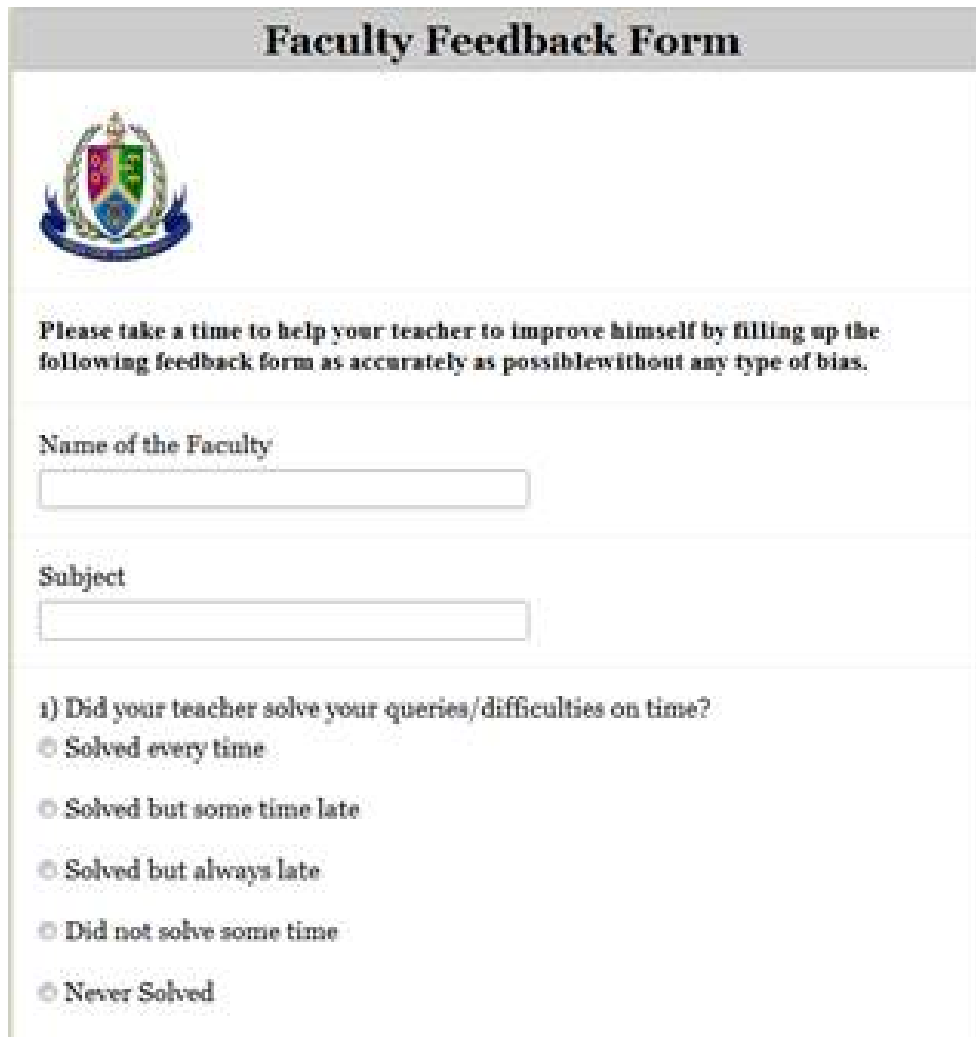
Following are some scenarios for the making the Subscription Rules:

- Scenario 1 Form (Sales Approval) for capturing

### Form List (40)

Id	Form Name	Delete	Responses	New	Admin	Email
49	Wedding Invitation	Delete	List (1)	New	Admin	Email
48	Faculty Feedback Form	Delete	List (3)	New	Admin	Email
47	Sales Approvals	Delete	List (19)	New	Admin	Email

opportunities where Manager's Approval is required, if the discount more than 25% is to be offered to the Customer



The screenshot shows a web form titled "Faculty Feedback Form". At the top left is a university crest. Below the title, a message asks the user to help their teacher improve by filling out the form accurately. The form contains two text input fields: "Name of the Faculty" and "Subject". Below these is a section titled "1) Did your teacher solve your queries/difficulties on time?" with five radio button options: "Solved every time", "Solved but some time late", "Solved but always late", "Did not solve some time", and "Never Solved".

**b. Scenario 2**

Leave requests where manager to be notified when leave created date is over two weeks old and leave status is not equal to Approved or Rejected

**Form Entry**

Create an entry or form instance.

- Click on the icon to add a new entry or form instance

**Form Instance Import**

For the already created forms, the user can import the data directly through an Excel file.

**Inbox**

Based on the Rules, the entry or instance will be shared through the Actionable Inbox

- Feeds can be shared with Company, Groups, Departments and individual Users
- Click on the Tags to apply the filter on the Feeds

The screenshot shows the 'Field Settings' tab for a 'FormulaField' widget. The 'Field Label (?)' is 'Duration'. The 'Formula Value' is '(To Date) - (From Date) + 14'. Below the formula is a calculator interface with a numeric keypad and a dropdown menu showing 'From Date', 'To Date', and 'Date Created'.

- Change the Status (Approve, Reject etc. from the Feeds view itself)
- Write a Post or Share a file attachment
- Rate any particular feed which is calculated based on the average rating given by the specified voters. This would help users to identify the most recommended Feed

### Autocomplete & Share/Un-share

Autocomplete on Feeds view: The user can simply type in the names of the individuals or groups with whom he wants to share the feed.

Feeds can be shared or un-shared with the multiple users and groups at the same time.

View the Reports in the form of charts or tables, which can be exported as PDF or Excel

- Reports interface link

**Note:** There are two types of reports which are present in the Application

- a. The canned report based on number of Feeds by Sender



**Leave Request**

From Date  Enter date in mm.dd.yyyy format

To Date  Enter date in mm.dd.yyyy format

Duration

- Select the Date Range
- Click on “Run Report” to execute the Report

b. The reports on the basis of customised form created

- Select the Date Range
- Select the Form on which the report is to be generated
- Select the X and Y Axes
- Click on “Run Report” to execute the Report
- After the report is generated, user can change the chart types
- The Data can also been seen in the Grid

**Master Form List (8)**

Forms **Master Forms** Sub-Forms

Id	Form Name	Delete	Entries	New	Admin
33	Employee	Delete	List (14)		Admin
28	Project-Master	Delete	List (10)	New	Admin
27	Project-Master	Delete	List (10)		Admin
25	material	Delete	List (2)	New	Admin
21	Project-Master	Delete	List (10)	New	Admin
15	Employee Information	Delete	List (14)	New	Admin
12	Employee	Delete	List (18)	New	Admin
4	Contractors	Delete	List (14)		Admin

Create ▼
 Templates

Form  
 Master Form  
 Sub Form  
 Upload Form

## Other Functionality

### Drop downs

User can create the Application wide drop downs through this option, primarily for the fields Department, Employee Type, Sub Organization and Group Type

### User Profile

User can update their profile with their Nick name, Status (For Client Admin), Picture, Name, Birthday, Background colour and Communication details.

## Form Sharing

The screenshot displays the 'One App' Form Builder interface. The top navigation bar includes 'One App' and a user profile 'Welcome Jack B.'. The left sidebar contains tabs for 'Add Field', 'Field Settings', and 'Form Settings'. The 'Add Field' tab is active, showing a grid of field types: Label, Date, Single Line Text, Number, Multi Line Text, Select, Radio Button, Checkbox, Hyperlink, Scale Rating, Link Image, Link Video, Formula Field, File Upload, Link Up, and Sub Form. The main workspace shows a form titled 'Productivity Tracker'. It includes two text input fields for 'Employee Name' and 'Email ID'. Below these is a table for 'Productivity Tracker' with columns: ID, Project ID, Project Name, Estimated Hours, Monday, and Tuesday. At the bottom of the form is a 'Sub Form 2' with columns: ID, Expense Type, and Amount. The form has 'Update' and 'List' buttons at the bottom.

User can also share a form directly to the non-application users. These forms can be Public, Login required or Password Protected

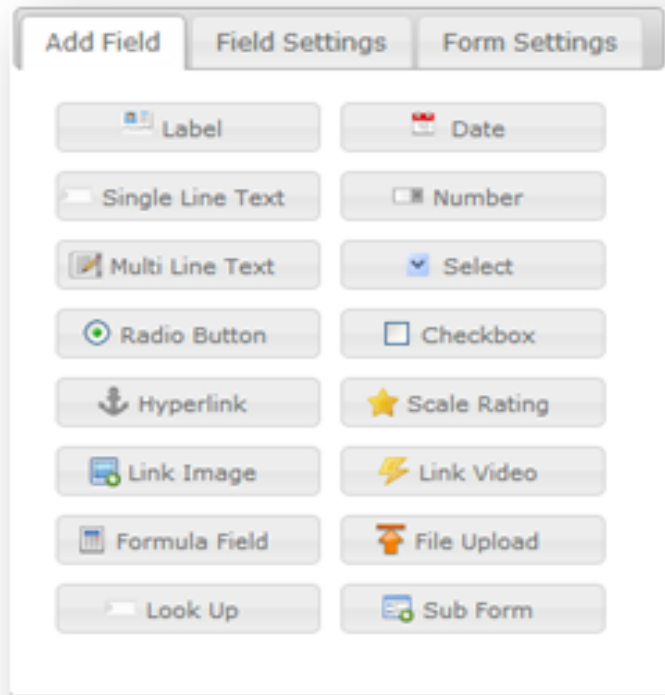
**Note:** Perform the following steps to share a Form:

- While creating Form Admin, define the type of sharing as Login, Password or Public
- Share the chart by clicking the Email link and sending an Email containing the Form link.

## Form Builder Formula Calculator

User can create a Formula based on the fields of the Form. You can perform calculations on numbers and dates.

### a. Scenario 1



The below mentioned formula calculates the difference between the two dates and adding 14 days to it:

## User Management

To analyse the user actions with respect to the forms User Management reports are provided within the Application which trace the user IP Address, Access mode, Action or Access location.

## Google Apps Integration

The Application data can be exported to the Google Spread sheet.

## Spot light Search

Spot light search is being provided in the application to search the users and the groups

One App

Welcome Jack B. >

Add FieldField SettingsForm Settings

Widget: Lookup

LabelEmployee NameValue  
Description  
Font  
Thin/Normal/Bold  
Size 16  
BoldItalicUnderline

Value  
Look-up FormEmployee  
Look-up FieldsNameEmailDesignationType  
Requiredany character  
Hide From User

Colors  
TextBackground  
LabelValueDescription

Productivity Tracker

Employee Name

Email ID

Productivity Tracker

ID	Project ID	Project Name	Estimated Hours	Monday	Tuesday

Sub Form 2

ID	Expense Type	Amount

UpdateList

### Form List (13)

FormsMaster FormsSub-Forms

Id	Form Name	Delete	Responses	New	Admin	Share
34	Employee	Delete	List (14)		Admin	
32	CustomerList	Delete	List (79)		Admin	
31	Productivity Tracker	Delete	List (3)	New	Admin	Share
29	Expense	Delete	List (2)	New	Admin	Share
26	Stock Report	Delete	List (4)	New	Admin	Share
24	Employee	Delete	List (14)		Admin	
19	Leave Approval	Delete	List (3)		Admin	
14	Customer List	Delete	List (79)	New	Admin	Share
13	Leave Request Approval	Delete	List (4)		Admin	
10	Customer Support	Delete	List (4)	New	Admin	Share

12Next

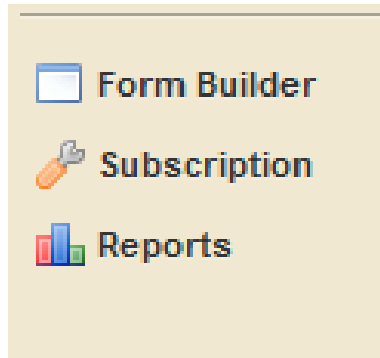
CreateTemplates

Upload File to create Form

Form Type : Form

Select File : Choose File No file chosen

UploadCancel



### Edit RuleSet

Details

Rule:

[New Rule](#)

Order	Object	Attribute	Operator	Value	Condition
1	Customer O...	Total Cost	>	100	AND
2	Customer O...	Amount Spe...	>	1000	AND
3	Customer O...	Total Units	Between	[1,100]	AND

Order:

Name:

Send to:

Send to instance:

Action to perform:

Status:

[Update](#) [Delete](#) [Subscription](#)

### Edit RuleSet

Details

Rule:	Order	Object	Attribute	Operator	Value	Condition
	1	Sales Approv...	Discount	>	25	AND

[New Rule](#)

Order:

Name:

Send to:

Send to instance:

Action to perform:

Status:

[Update](#) [Delete](#) [Subscription](#)



### Edit RuleSet

Details

Rule:

New Rule

Order	Object	Attribute	Operator	Value	Condition
1	Leave Request	Date Created	<	@now - 14	AND
2	Leave Request	Status	=	null	AND

Order:

Name:

Send to:

Send to instance:

Action to perform:

Status:


Update


Delete


Subscription


**One App**


Welcome Sid


  
Sid Bhattacharya


 Inbox 21


 Leave Approval 7


 Purchase Order F... 3


 Leave Approval W... 1

 Travel Request &... 1

 Customer Opport... 0

 Form Builder

 Subscription

 Reports

### Create Purchase Order From

Details

Please complete this form

Date of purchase \*

Reason

Internal Comments

Status

Purchase Type ☐ Internal ☐ External



## List Employee

Select	Id	Name	Email	Designation	Type	Salary(\$)	Leave Balance	Share/Copy	
<input type="checkbox"/>	14	Sid B	sid@oneappdo...	Founder	Internal	45,000	13	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	13	Jack	jack@oneappd...	Sales	External	25,000	12	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	12	Terry	terry@gmail.com	Sales	Internal	20,000	20	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	11	Jenny	jenny@gmail.com	Developer	External	40,000	33	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	10	Jason	jason@gmail.com	Developer	External	35,000	12	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	9	Symantha	symantha@gma...	Sales	Internal	55,000	34	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	8	Martha	martha@gmail.c...	Marketing	External	70,000	32	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	7	Duke	duke@gmail.com	Sales	Internal	60,000	34	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	6	Brad	brad@gmail.com	HR	Internal	35,000	20	<a href="#">Share</a>	<a href="#">Copy</a>
<input type="checkbox"/>	5	Dann Hoffman	dann@gmail.com	HR	External	45,000	33	<a href="#">Share</a>	<a href="#">Copy</a>

1 2 [Next](#)

[+ Create](#) ▼

[Export](#) ▼

### Upload Form Data


Select File : [Choose File](#) No file chosen

[Upload](#)

[Cancel](#)

One App

Welcome Mike ▾



Mike Brown

Inbox 131

Purchase Order ... 4

Travel Request ... 3

Leave Request 3


Sales Approvals 19

Form 1 2

More Forms

More

Write Post Share File



Mike


Click here to view approval - Link

From Date	03/29/2012	To Date	03/31/2012	Duration	2
Leave Type	Vacation	Reason	Family function	Date Created	03/29/2012

Status comments (0) (0 votes) 20 minutes ago

Write comment....


Attach File



Mike

Hey Ronn, Can you confirm that you can attend the meeting on 7th?

comments (1) (1 votes) 5 hours ago



Sid : The time would be around 3:00 PM EST!

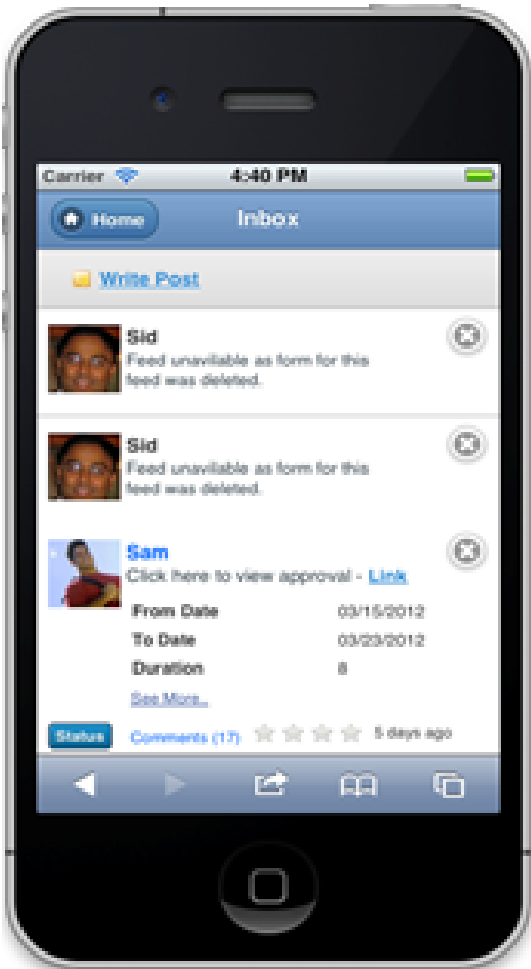
moments ago

Write comment....

Attach File


http://localhost:8080/form-builder/documentation/universal\_help.gsp

21/36





One App


Welcome Jack B. ▾





Jack B.


 Inbox 44

 Approvals 3


 Time Approval 3


 Leave Request A... 4

 Leave Approval 3


 Contact Us 3

[More Forms](#)

 Write Post

 Share File

Fetch Email



To:

user x Sales x hr

Group : HR


Role : HR Manager

Department : HR

Choose File


No file chosen

Share







Jack B.

Do this work



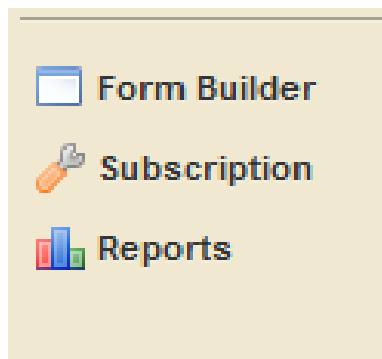
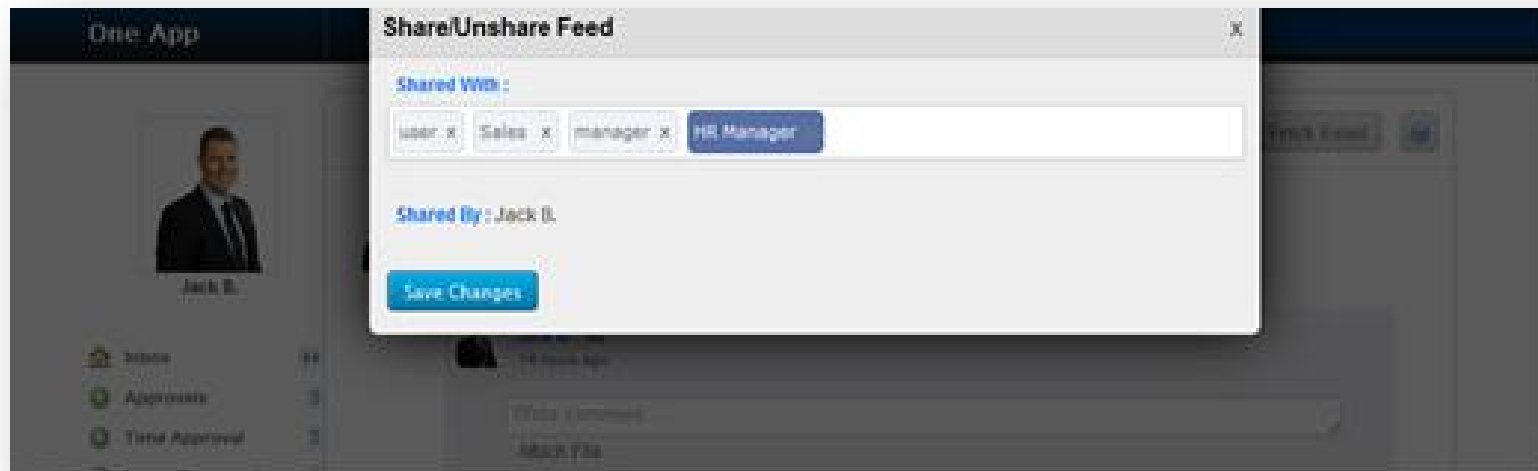
comments (1)

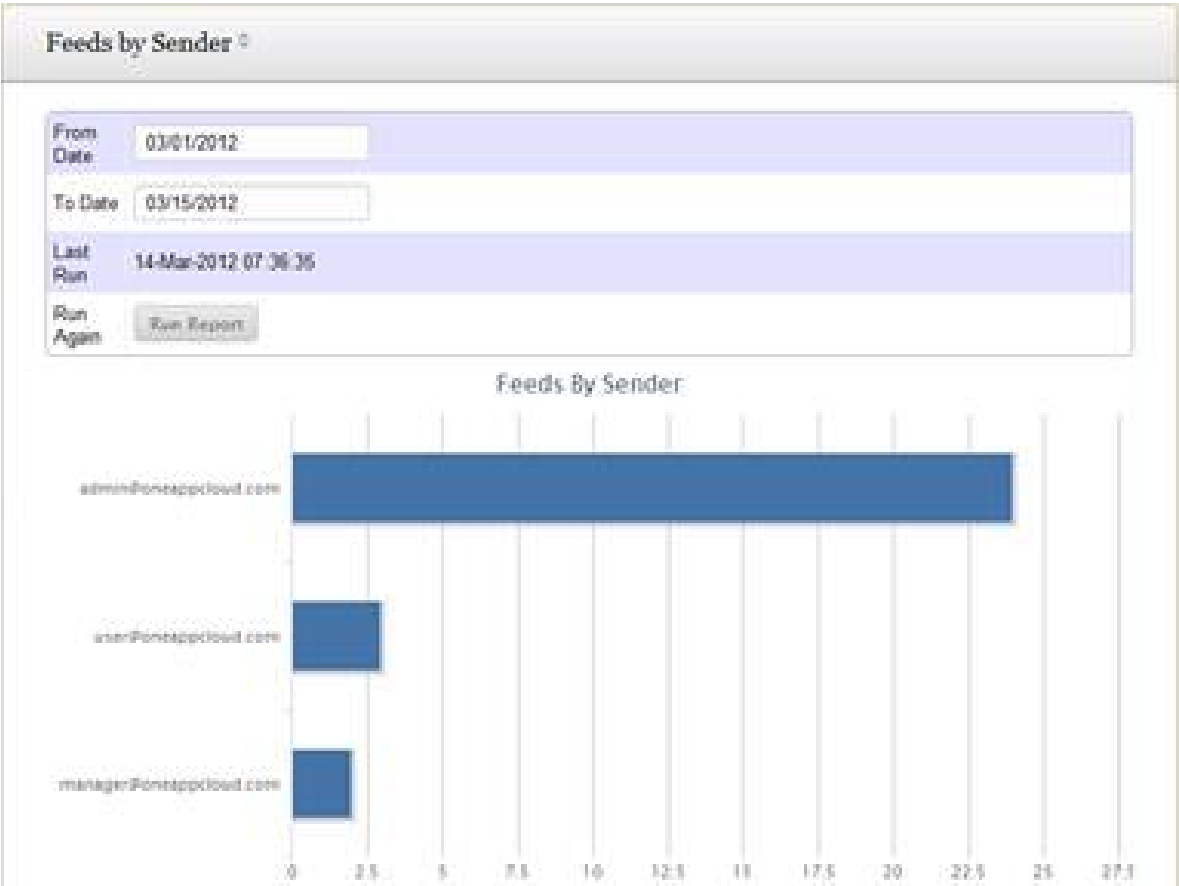
(1 votes) 13 hours ago

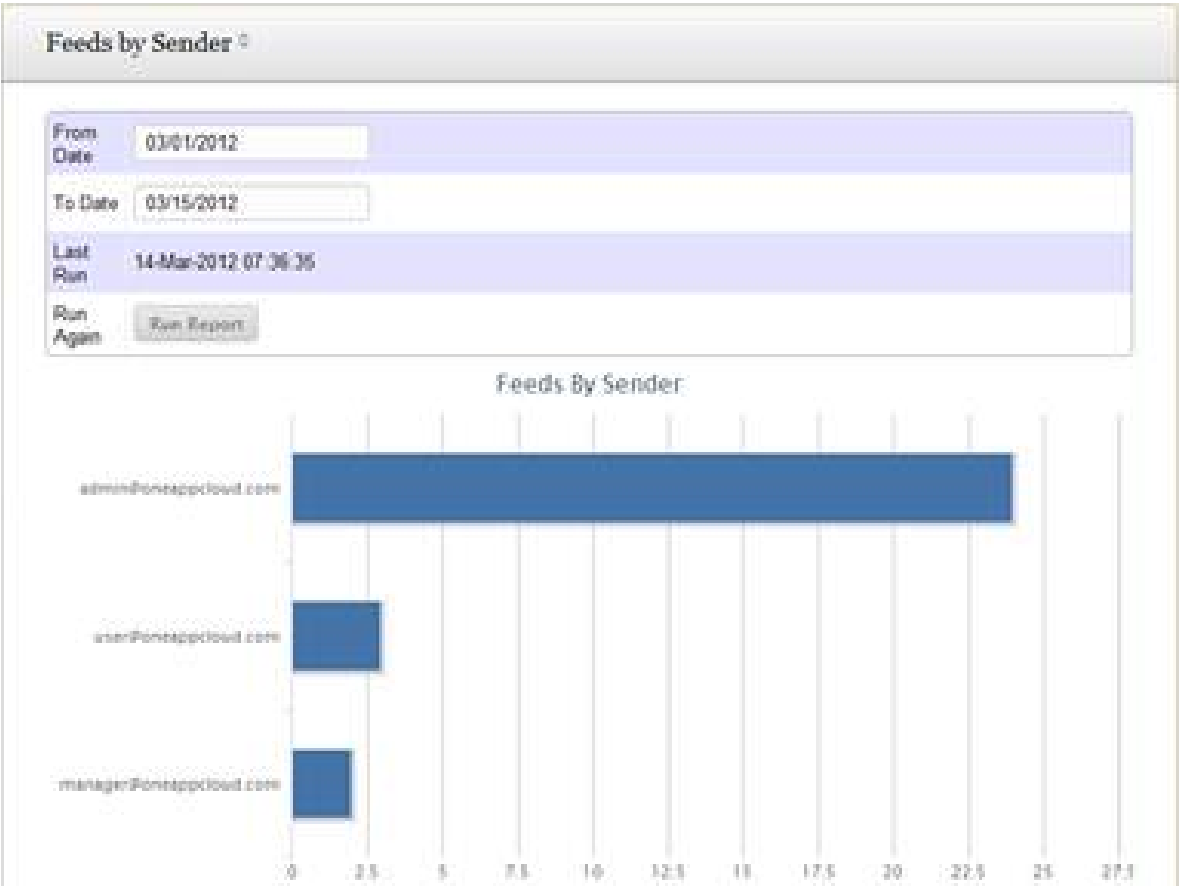
[http://localhost:8080/form-builder/documentation/universal\\_help.gsp](http://localhost:8080/form-builder/documentation/universal_help.gsp)

23/36



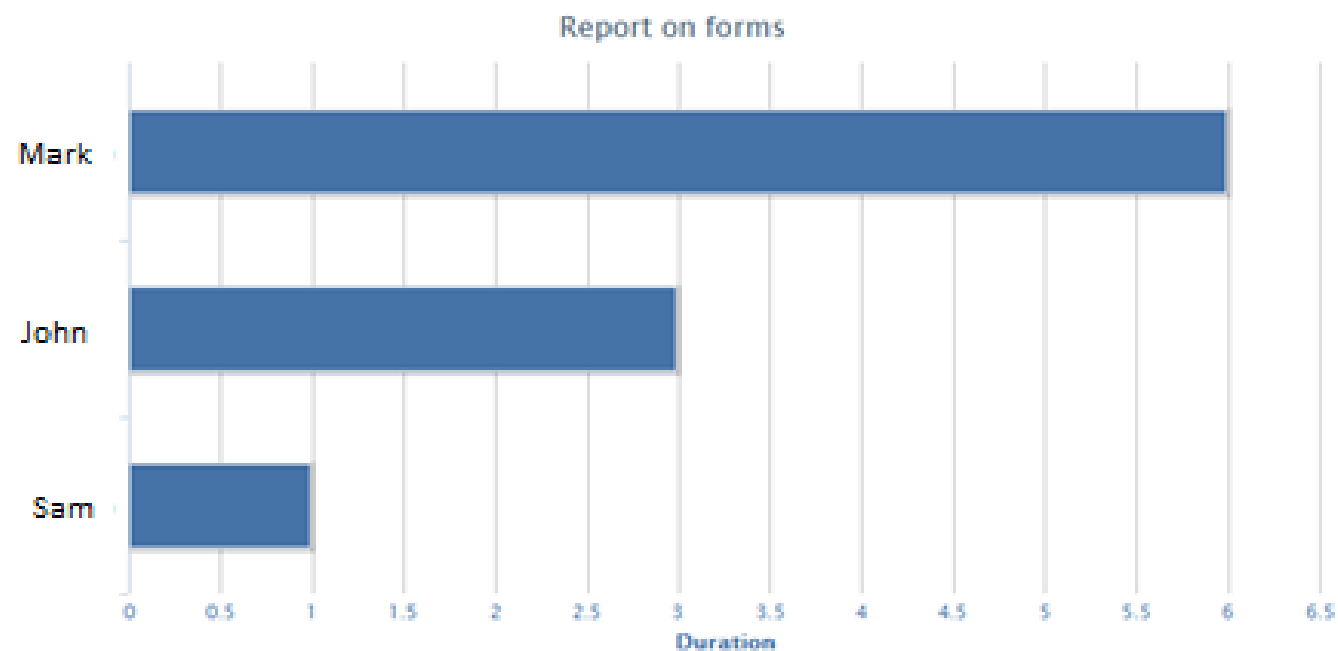






## Report on forms

From Date	<input type="text" value="03/20/2012"/>	Form:	Leave Request <input type="button" value="v"/>
To Date	<input type="text" value="03/27/2012"/>	X-Axis:	Name <input type="button" value="v"/>
Last Run	Mar 27, 2012 6:30:05 PM		
Sort/Order	Duration <input type="button" value="v"/> Descending <input type="button" value="v"/>	Y-Axis:	Duration <input type="button" value="v"/>
Run Again	<input type="button" value="Run Report"/>	Chart Type:	Bar Chart <input type="button" value="v"/>



Name	Duration	Date Created
Mark	4	Mar 26, 2012 8:41:56 PM
John	3	Mar 26, 2012 8:41:03 PM
Mark	2	Mar 26, 2012 8:41:28 PM
John	1	Mar 26, 2012 8:42:13 PM
Total Entries	10.00	

**Report Summary :** Between 03/20/2012 and 03/27/2012 there are 4 entries in this form.

The screenshot shows the 'Create DropDown' form in the Form Builder interface. The form has three input fields: 'Type' set to 'DEPARTMENT', 'Name' set to 'Sales', and 'Description' set to 'Sales Department'. A green 'Create' button is at the bottom. A navigation menu is open on the right, showing options: 'Welcome Ashe', 'Users', 'Drop Downs' (highlighted), 'Profile', 'Password', and 'Logout'.

Welcome Ashe ▾

Users ▾

Drop Downs

Profile

Password

Logout

Create DropDown

Type: DEPARTMENT ▾

Name: Sales

Description: Sales Department

Create

Welcome Ashu ▾

### Edit Profile

Basic Communication

Username:

Nick Name:

Status:

Picture URL:

First Name:

Last Name:

Title:

Birthday (mm/dd/yyyy):

Bg. Color (Ex. #FFEEDD):

- Users
- Drop Downs
- Profile
- Password
- Logout

Edit Form Admin

Details

Form: Form 1

Form Type: Approval

Select status field: Status

User changes not allowed for:  
Approve  
Reject

Open for editing: ☒

Published: ☒

Form Login: Login

Form Submit Message: Login





















Key Figures:

Non Key Figures: From Date  
To Date  
Leave Type  
Reason

Update

Form List

**Form List (13)**

Id	Form Name	Delete	Responses	New	Admin	Email
63	Form 1	Delete	 List (1)	 New	Admin	Email
57	Test Form	Delete	 List (2)	 New	Admin	Email
53	Social Trivia	Delete	 List (3)	 New	Admin	Email
49	Wedding Invitation	Delete	 List (1)	 New	Admin	Email
48	Faculty Feedback Form	Delete	 List (3)	 New	Admin	Email
47	Sales Approvals	Delete	 List (1)	 New	Admin	Email
46	Contact Us	Delete	 List (1)	 New	Admin	Email
45	Quacky Ducks Custom...	Delete	 List (9)	 New	Admin	Email
44	Test	Delete	 List (0)	 New	Admin	Email
34	Customer Incident	Delete	 List (0)	 New	Admin	Email

1 2 Next

[Create](#) [Templates](#)

Add FieldField SettingsForm Settings

Widget: FormulaField

Field Label (?)Duration

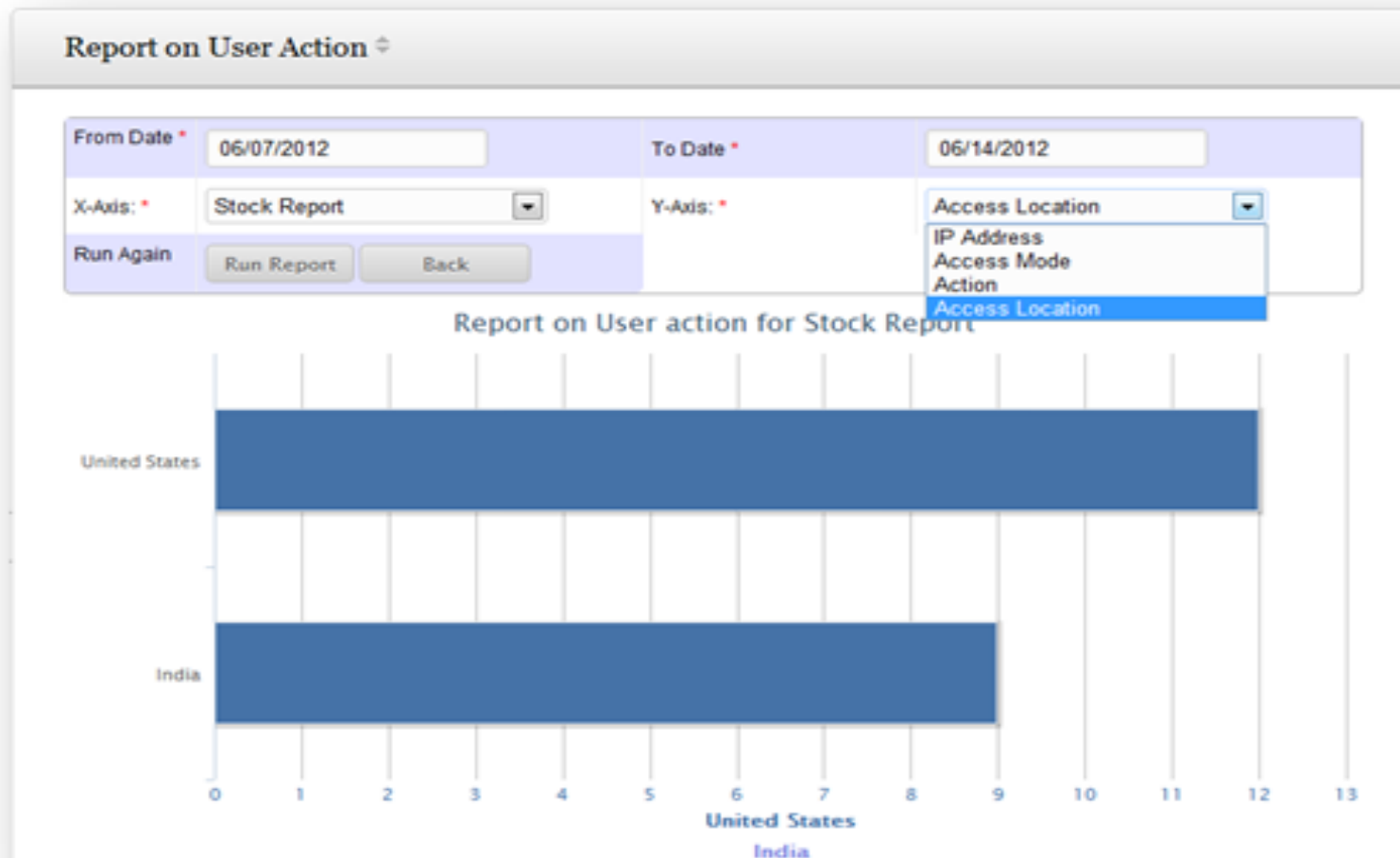
Formula Value

(To Date) - (From Date) + 14

1	2	3	<-	From Date
4	5	6	+	To Date
7	8	9	-	Date Created
(	0	)	*	
			/	



Leave Request		
▪ From Date	<input type="text"/>	Enter date in mm.dd.yyyy format
▪ To Date	<input type="text"/>	Enter date in mm.dd.yyyy format
Duration	<input type="text" value="Calculated Field"/>	



### List Employee

Select	Id	Name	Email	Designation	Type	Salary(\$)	Leave Balance	Share/Copy
<input type="checkbox"/>	14	Sid B	sid@oneappclo...	Founder	Internal	45,000	13	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	13	Jack	jack@oneappcl...	Sales	External	25,000	12	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	12	Terry	terry@gmail.com	Sales	Internal	20,000	20	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	11	Jenny	jenny@gmail.com	Developer	External	40,000	33	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	10	Jason	jason@gmail.com	Developer	External	35,000	12	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	9	Symantha	symantha@gma...	Sales	Internal	55,000	34	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	8	Martha	martha@gmail.c...	Marketing	External	70,000	32	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	7	Duke	duke@gmail.com	Sales	Internal	60,000	34	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	6	Brad	brad@gmail.com	HR	Internal	35,000	20	<a href="#">Share</a> <a href="#">Copy</a>
<input type="checkbox"/>	5	Dann Hoffman	dann@gmail.com	HR	External	45,000	33	<a href="#">Share</a> <a href="#">Copy</a>

1 2 [Next](#)

[Create](#)

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