IndaForms

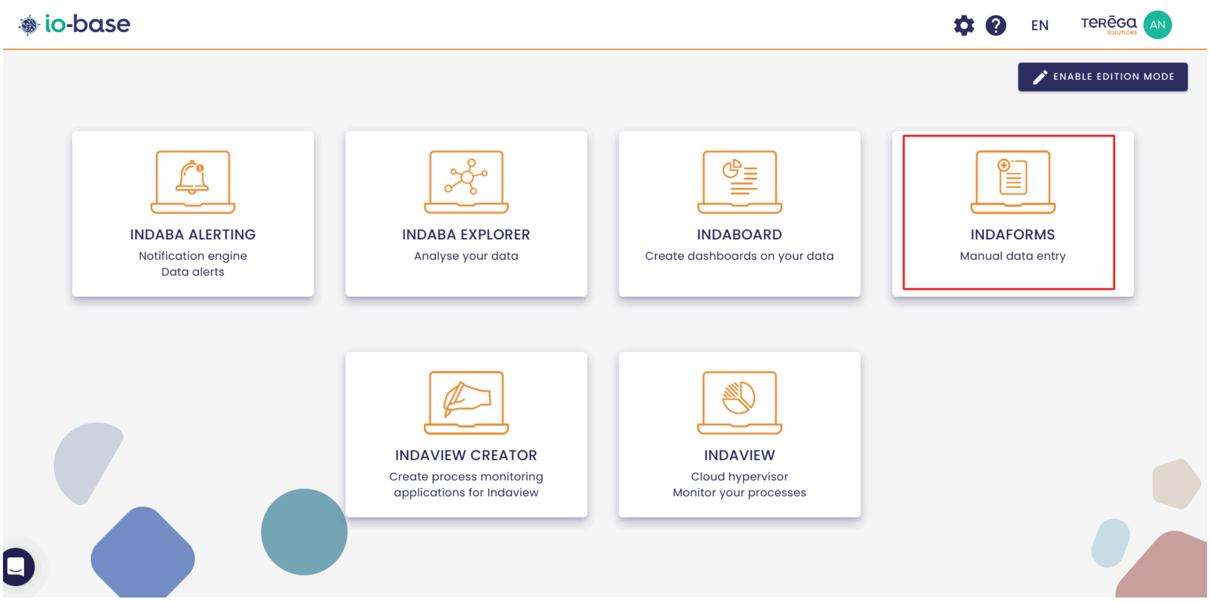
User documentation

Content

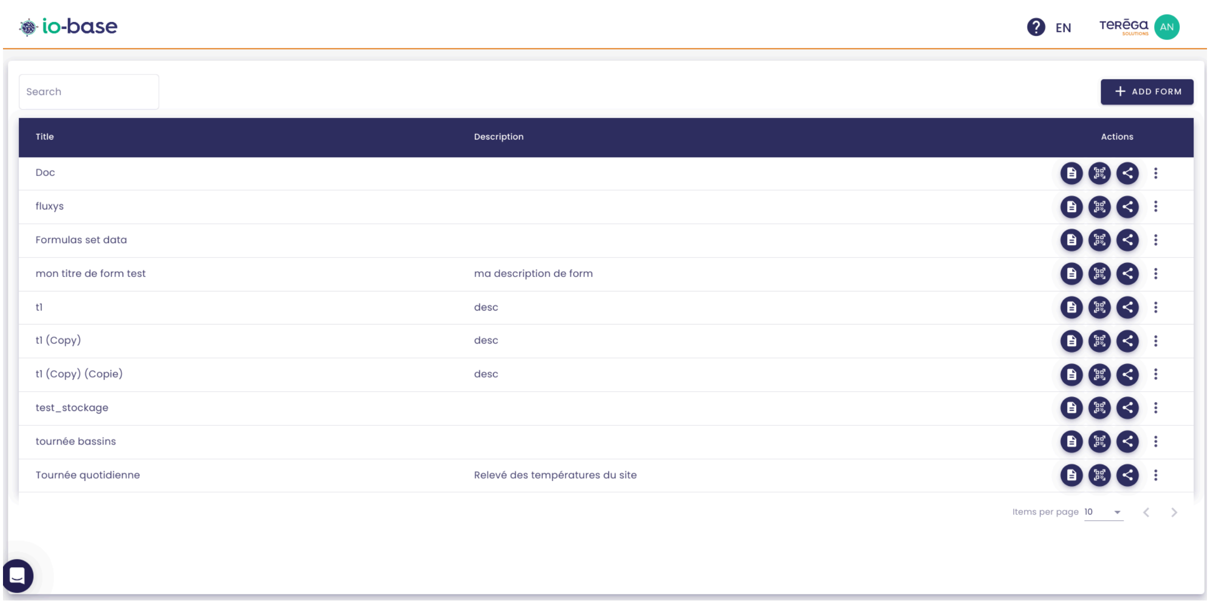
1. Access IndaForms

Prerequisite : this feature is available for users with a **functional administrator** role.

Connect to the **Io-base** portal.



Click on the IndaForms tile to open the application. You are redirected to IndaForms, in the menu **List of forms.**



2. Create a form

Access IndaForms.

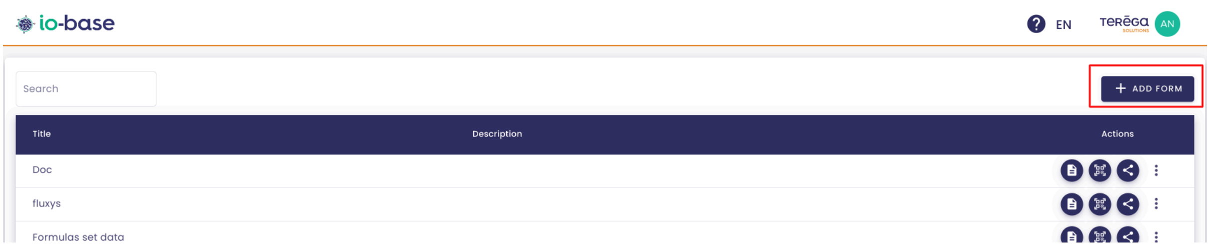
Some of the data that is important to your business is not automatically uploaded to io-base, for example when it is collected manually on a site (a thermometer that is not connected for example).

With Indaforms, you will be able to create forms to enable users to enter data manually, and have it stored in io-base.

For each form created, you will need to define :

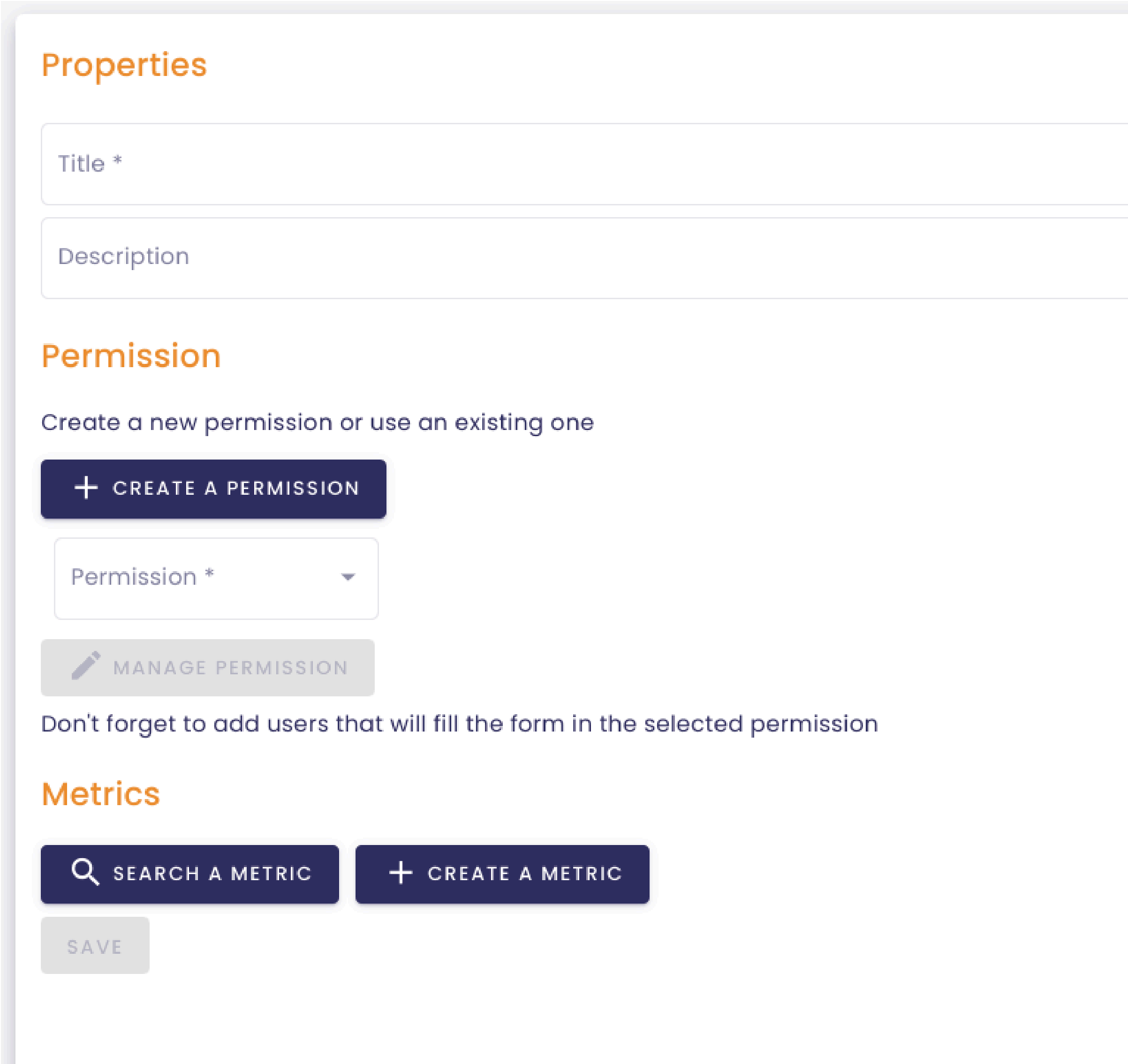
- which metric (or metrics) you want to enter a value for
- who is authorised to enter the values

At the top right, click on **Add Form**.



Fill in the fields:

- Title : title of the form
- Description : description of the form
- Permission : who will be allowed to fill in the form
- Choice of metric(s) : the metrics for which values will be entered



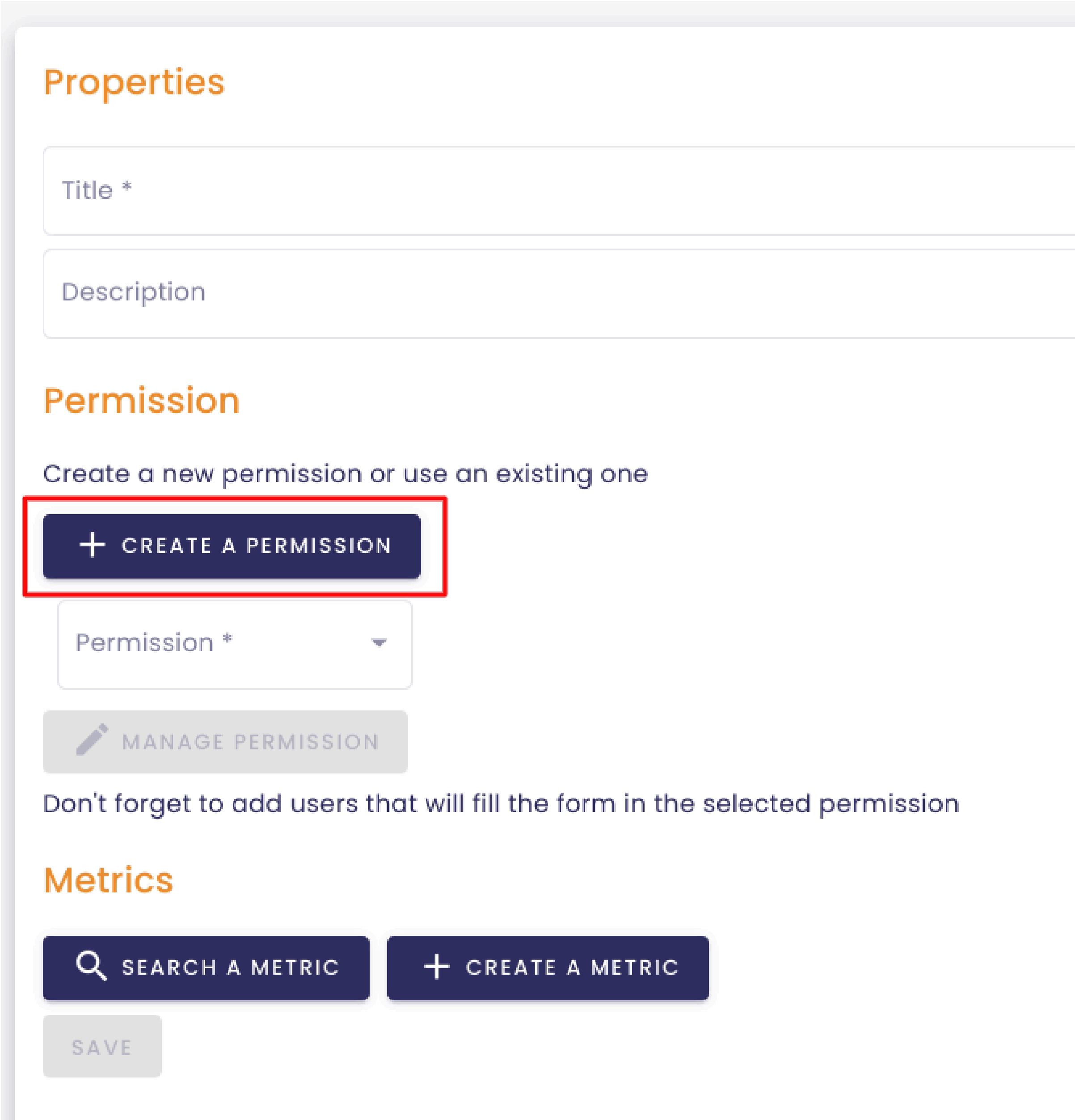
Note : the fields **Title** and **Permission** are mandatory.

2.1 Defining a permission

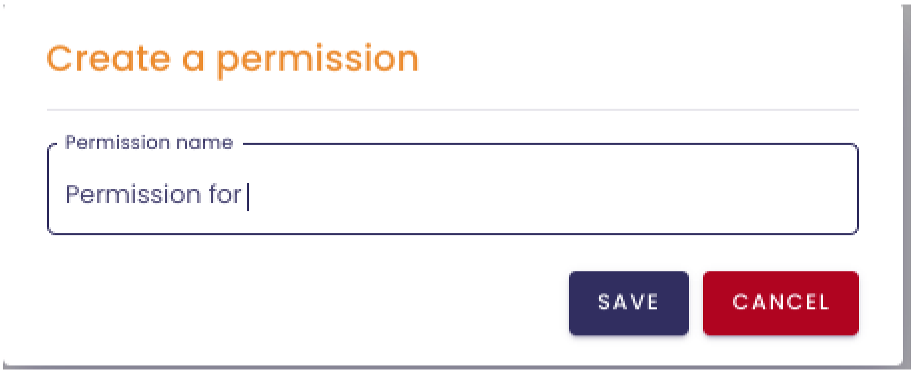
The **Permission** section is used to define who has the right to record values for the metrics in this form. You can select an existing Permission, or create a new one.

Note: the permission selected must allow writing. It must be applied to the form's metrics, via the Metrics Management module.

To create a permission, click on **Create a permission**.



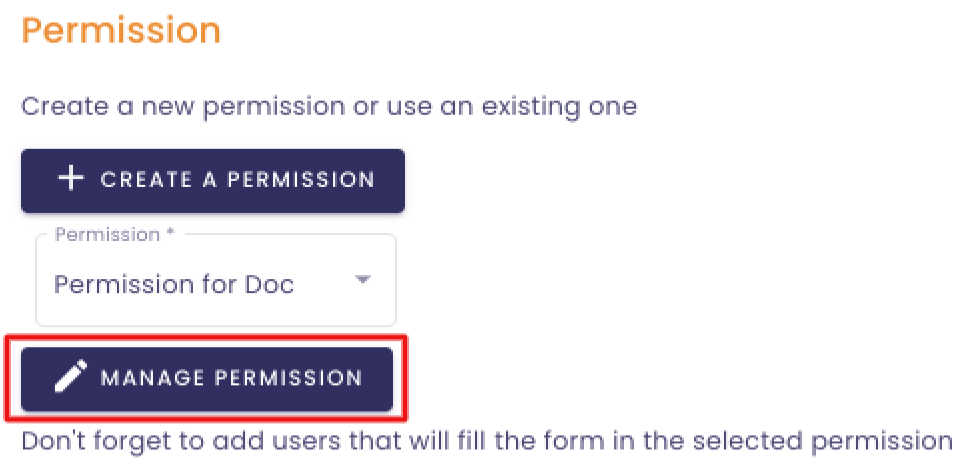
A pop-up window opens. Complete the name of the permission.



Note : By default, the name given is "Permission for [form title]". Therefore, by default, you will create a group specifically for your form. The permission you create is automatically set up with read/write rights.

Once you have chosen the permission, you need to add users.

To do so, click on Manage permission.

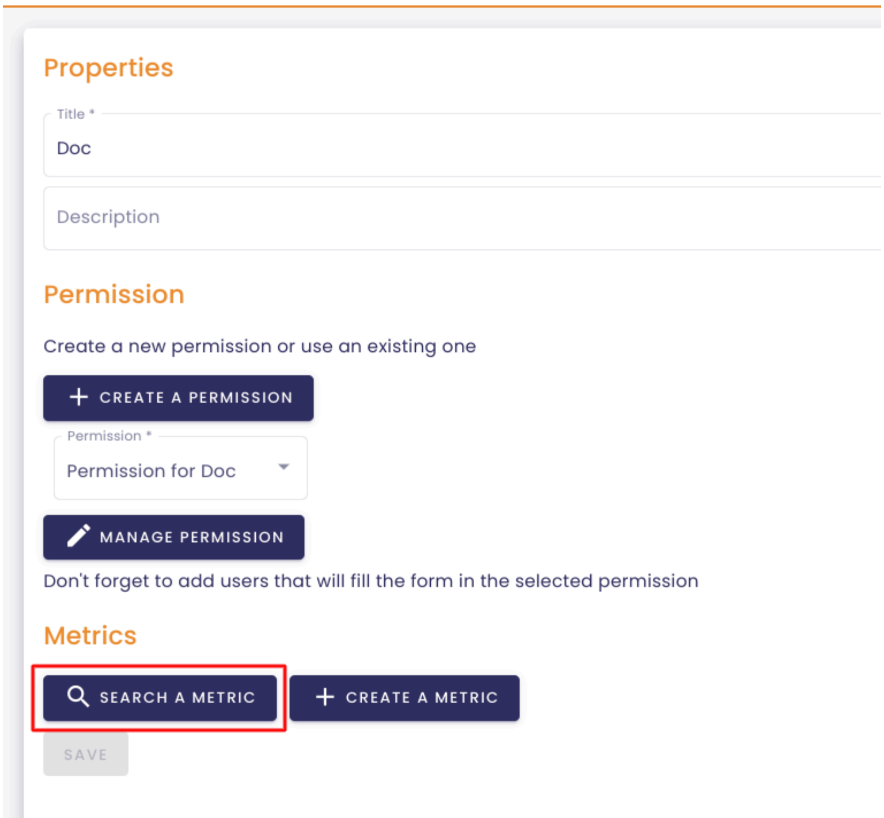


You are redirected to the "**Edit a permission**" screen.

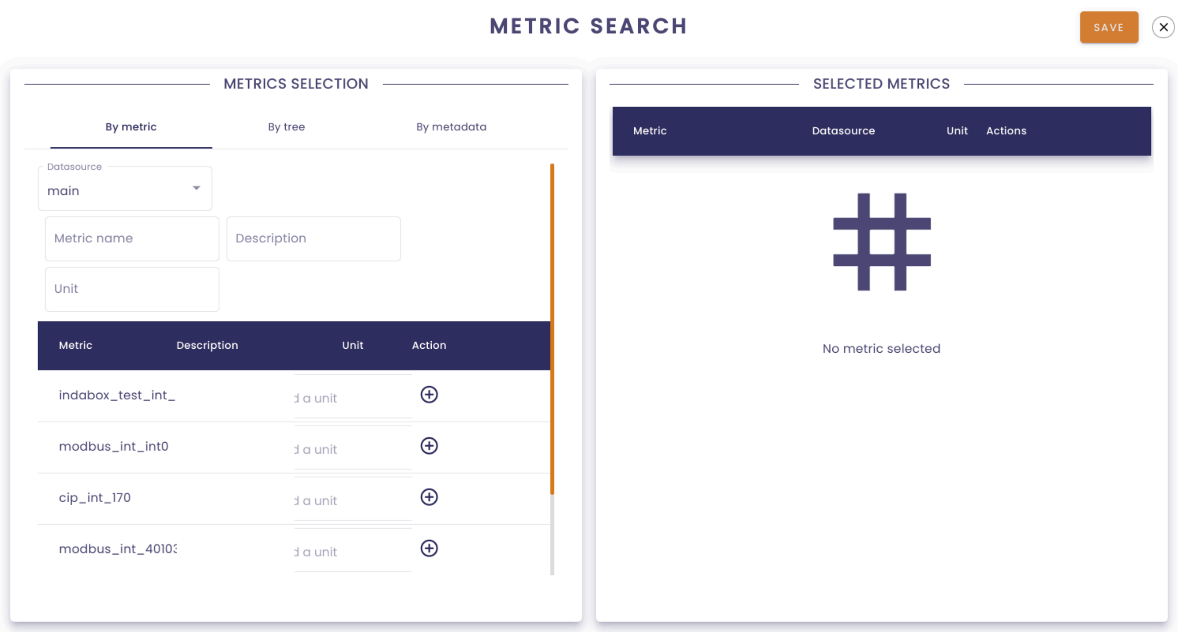
2.2 Defining a metric

The final step is to define the metrics that will appear in the input form. Here again, you can either select one (or more) of the existing metrics, or create a new metric.

Search for an existing metric

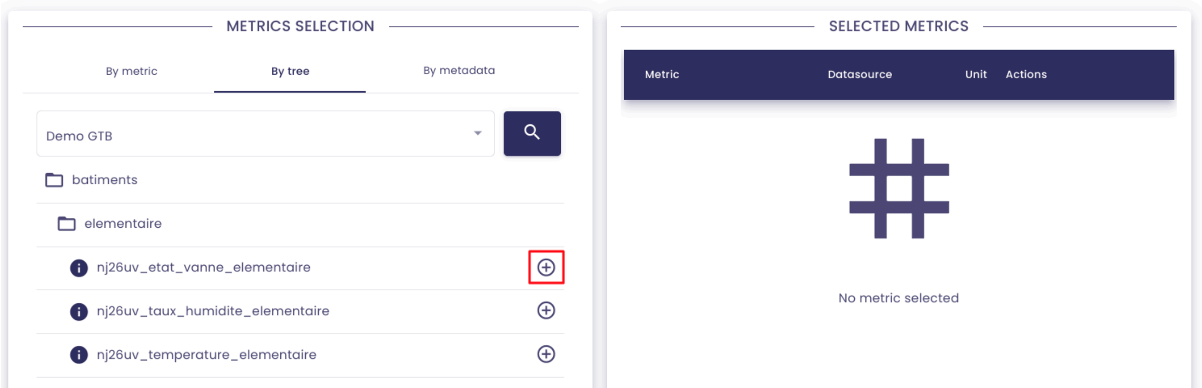


The pop-up window **Metric search** opens.

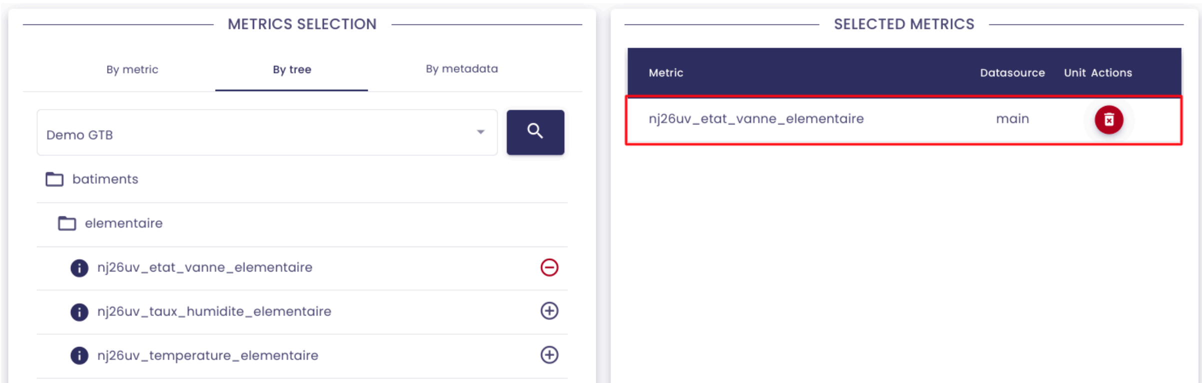


You can search by tree structure, metadata or metric name.

To add a metric, press the "**+**" button.



The selected metric appears in the table, on the right.



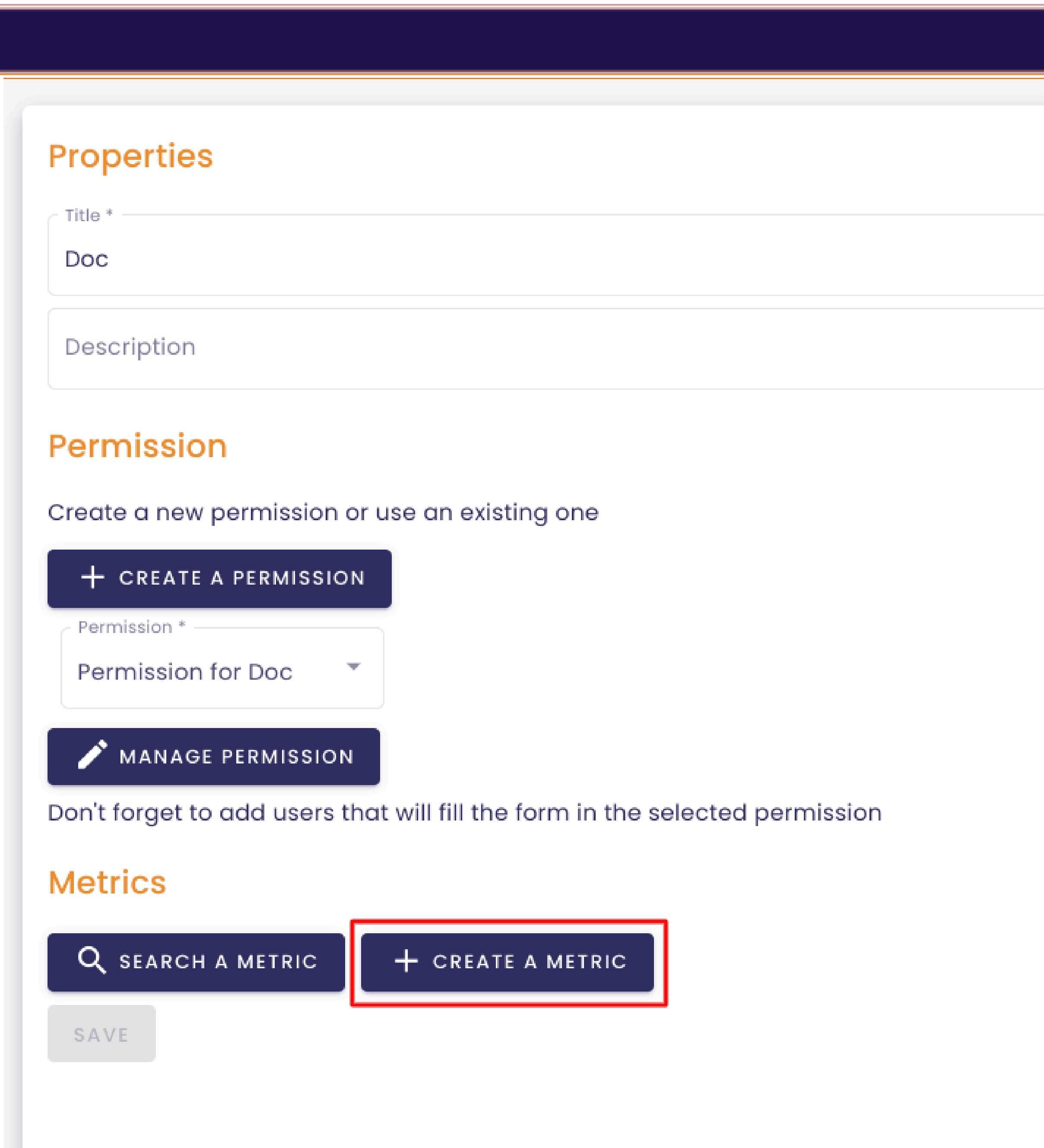
Click on **Save**.

The metric is selected and appears in your form creation screen.

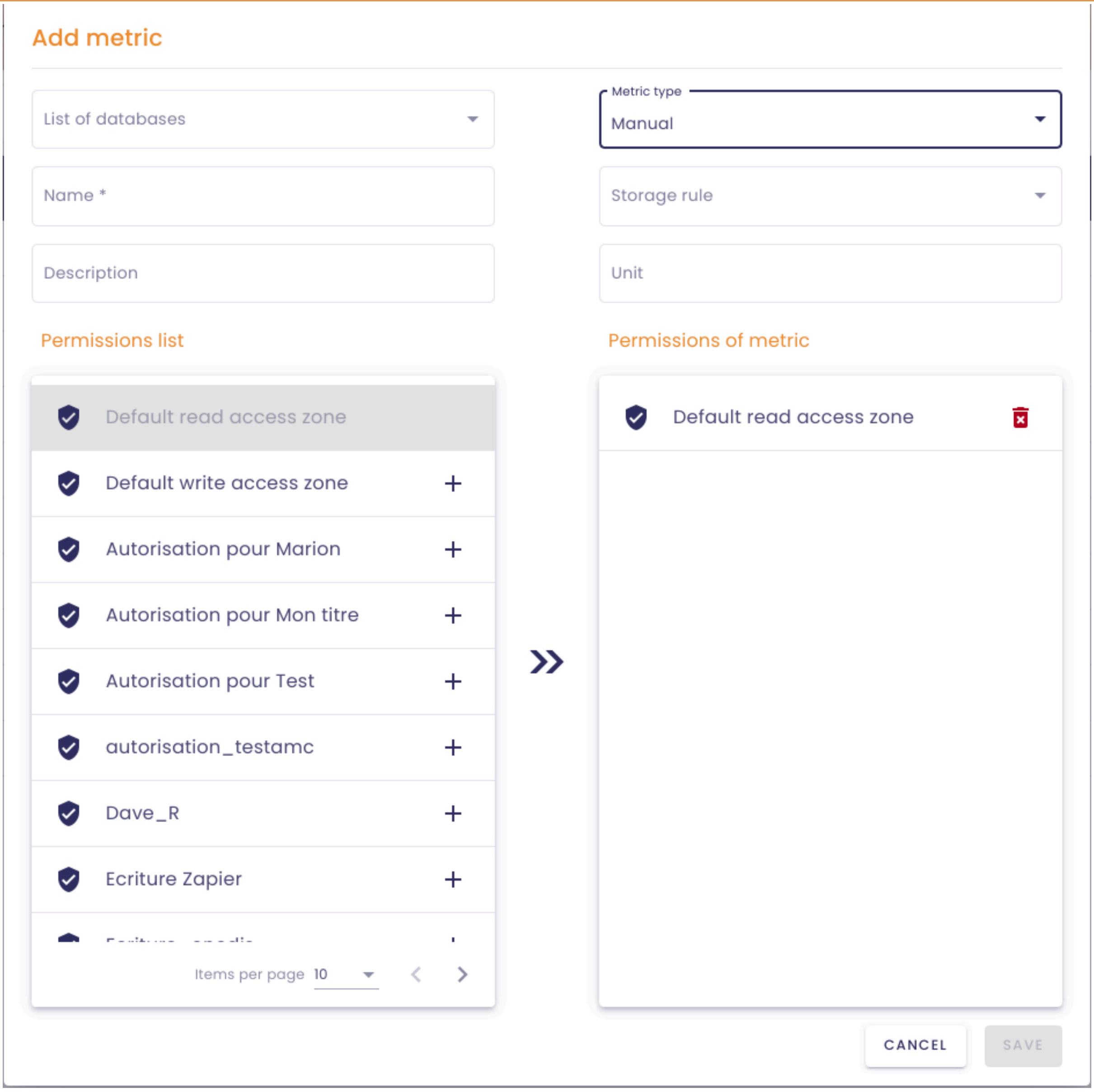
2.3 Creating a metric

You can also create a metric to be attached to your form.

To do so, click on **Create a metric.**



You will be redirected to the **Add metric** page.

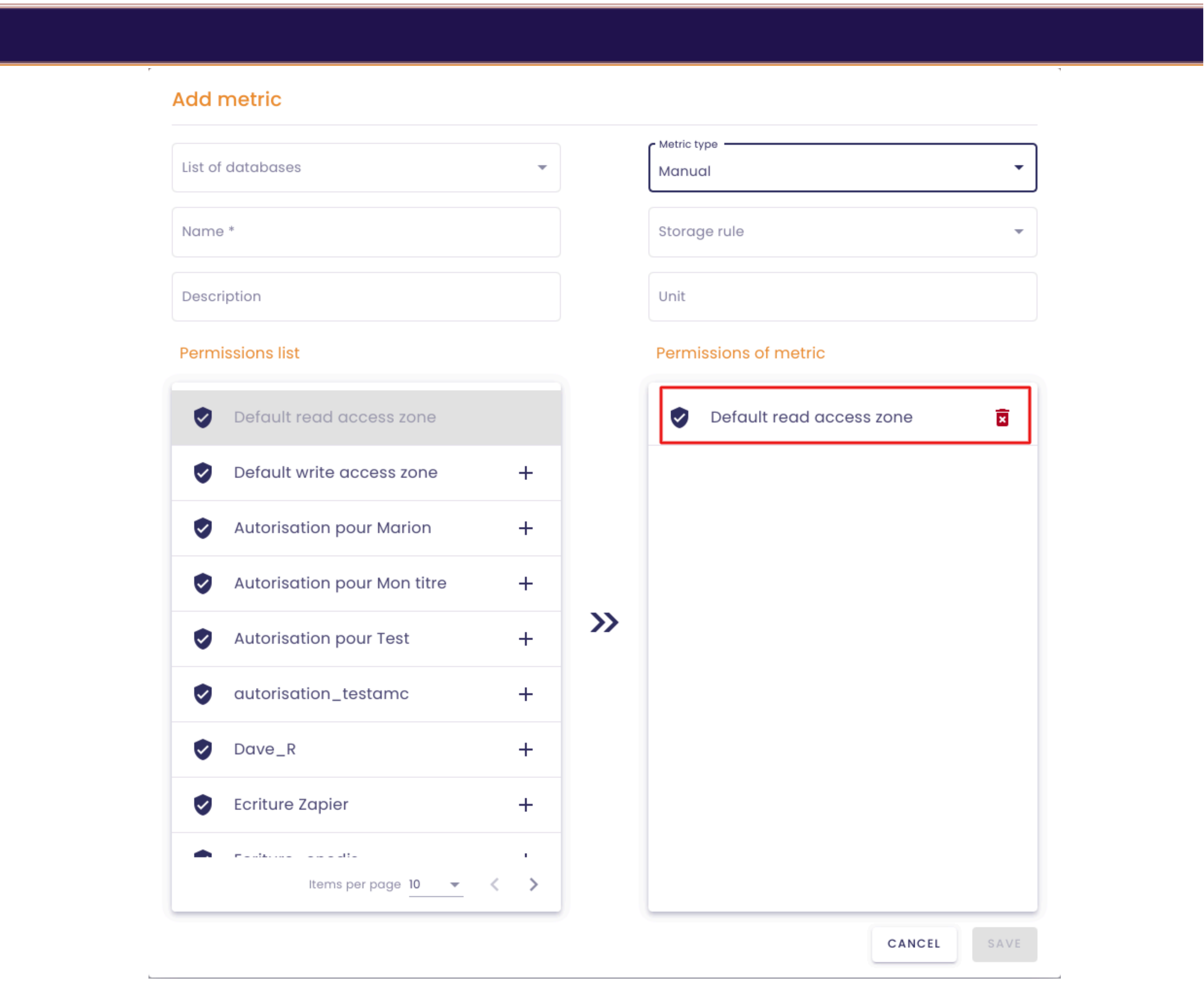


Create your metric by indicating :

- the corresponding database (required)
- a Name (required)
- a Description (optional)
- a storage rule (optional)
- a unit (optional)

Choose one or more permissions for the metric by clicking on the "+" in the list of permissions.

The permissions selected appear in the left-hand table **Permissions of metric**.

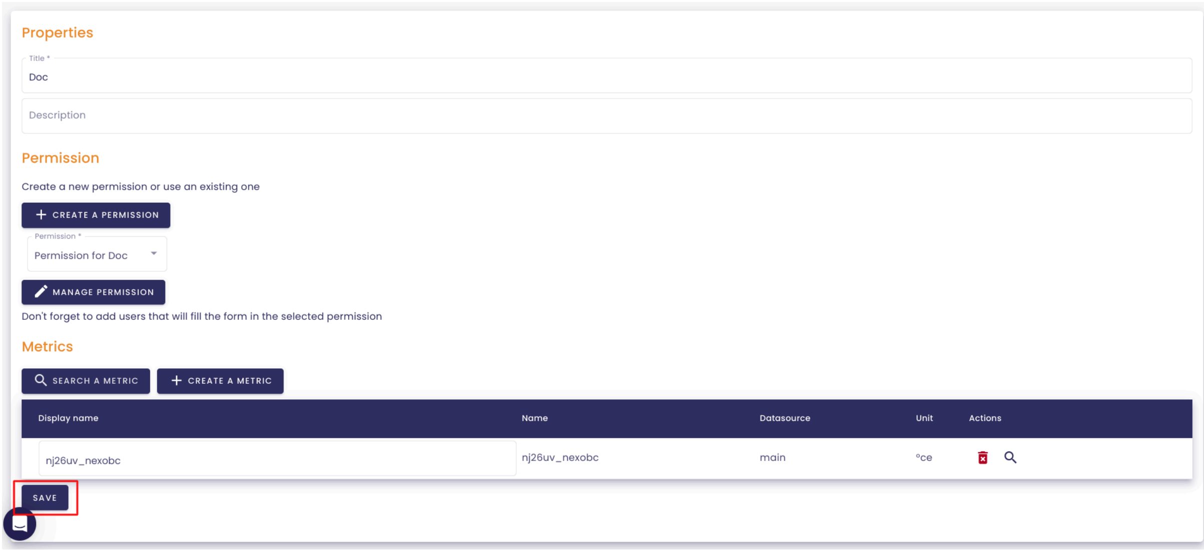


Click on **Save**.

Your metric is created and you can now select it by searching for it using the **Search a metric** button as shown below.

2.4 Saving the form

Now click on **Save**.



Your form now appears in the list of forms.

2.5 Using the form

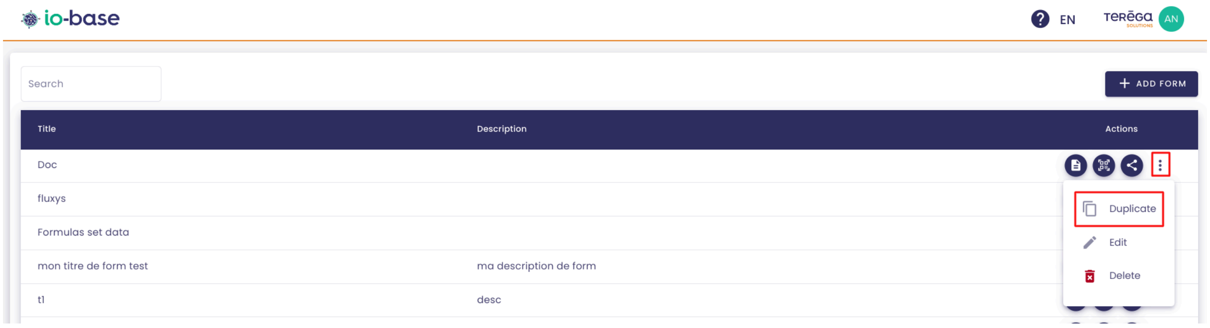
Now that your form has been created, you can share the input link with the users who need to use it. In the **Actions** column, you'll find the link to the form, which can be copied, or the QR Code for direct access to the input screen.

3. Duplicate a form

[Access IndaForms.]

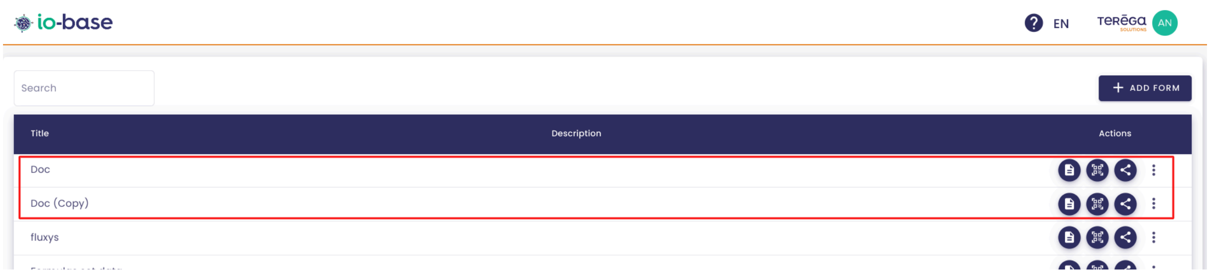
In the list of forms, go to the form you want to duplicate and click on

Then click on **Duplicate.**



A pop-up window opens. Click on **Duplicate**.

A copy of your form is created and appears in the list of forms.

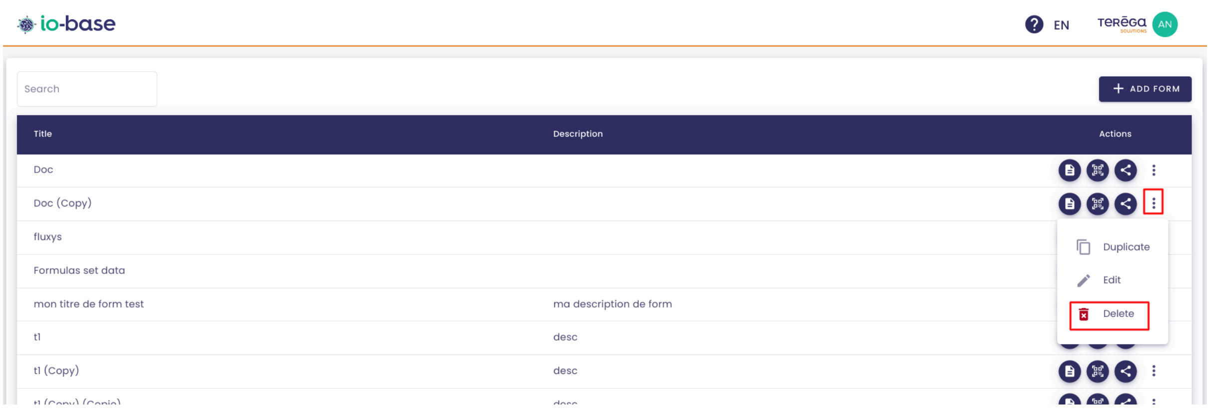


[4. Delete a form]()

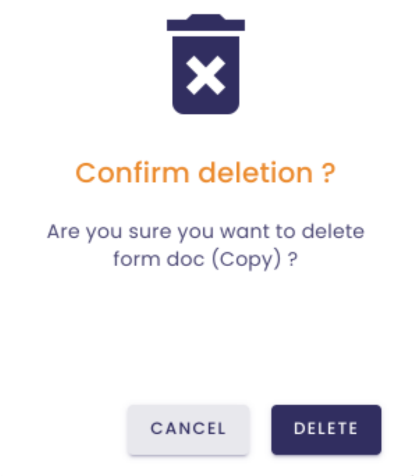
[Access IndaForms.]()

In the list of forms, go to the form you want to delete and click

Then click **Delete**.

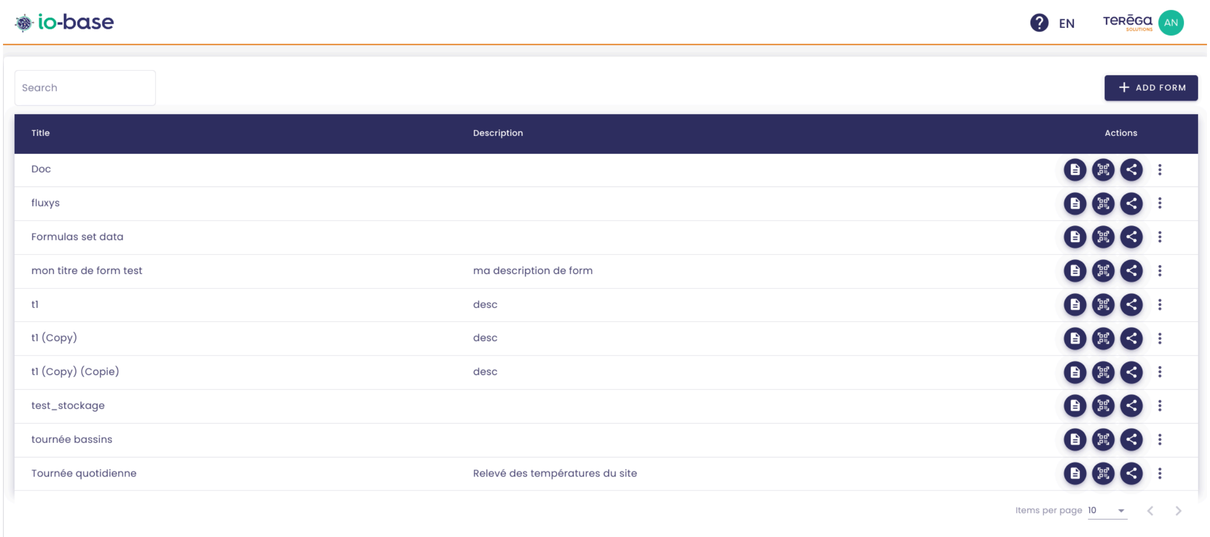


A pop-up opens. Click **Delete**.



The form is deleted and no longer appears on the list of forms.

Here for instance, our form entitled Doc (Copy) no longer appears on the list.



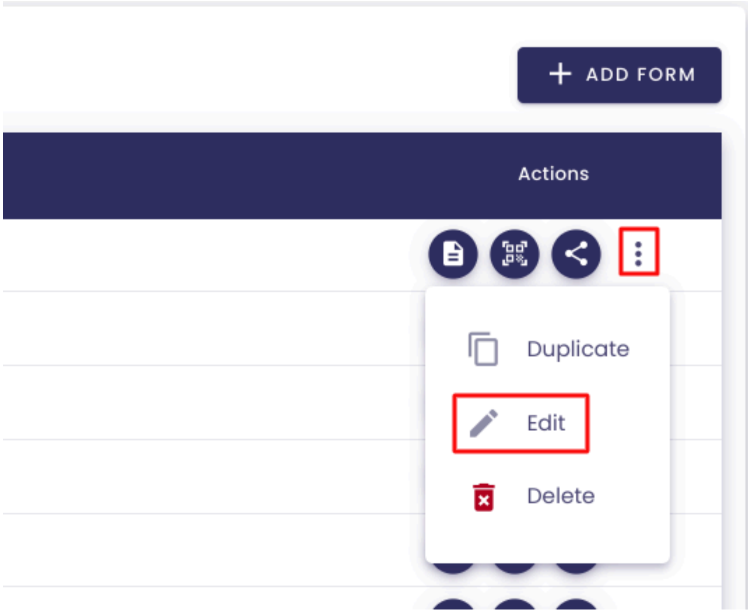
Note : Warning, the deletion of a form is irreversible.

5. Edit a form

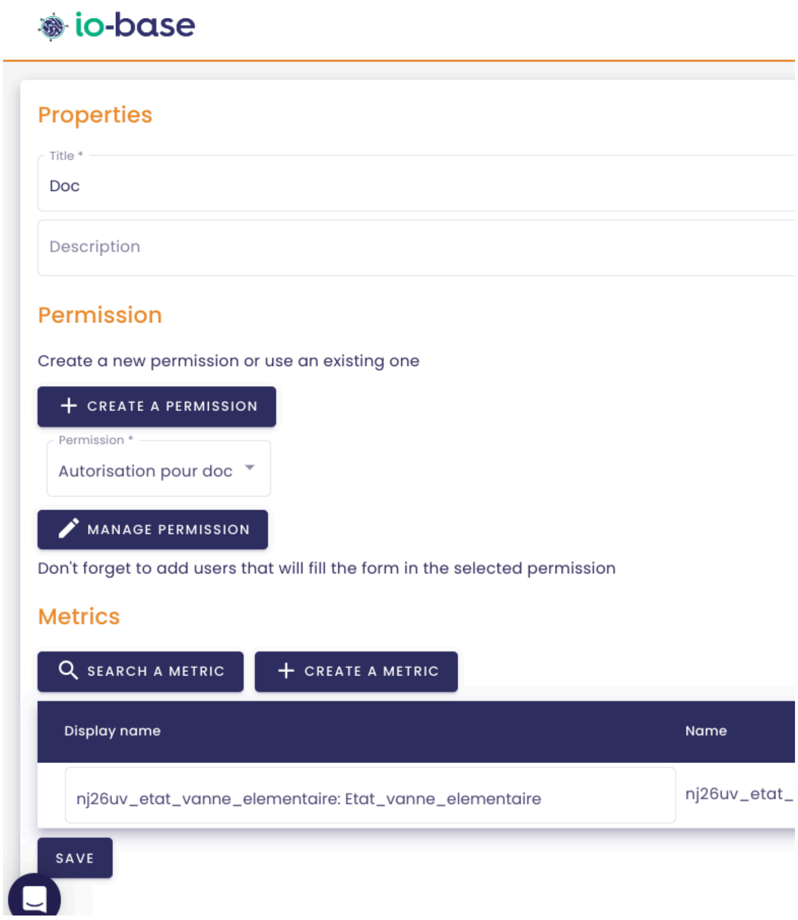
[Access IndaForms.]()

In the list of forms, go to the form you want to edit and click

Then click **Edit.**



You are redirected to the screen **Edit a form.** It has the same items as the screen [Add a form](#) .



Modify the items you want.

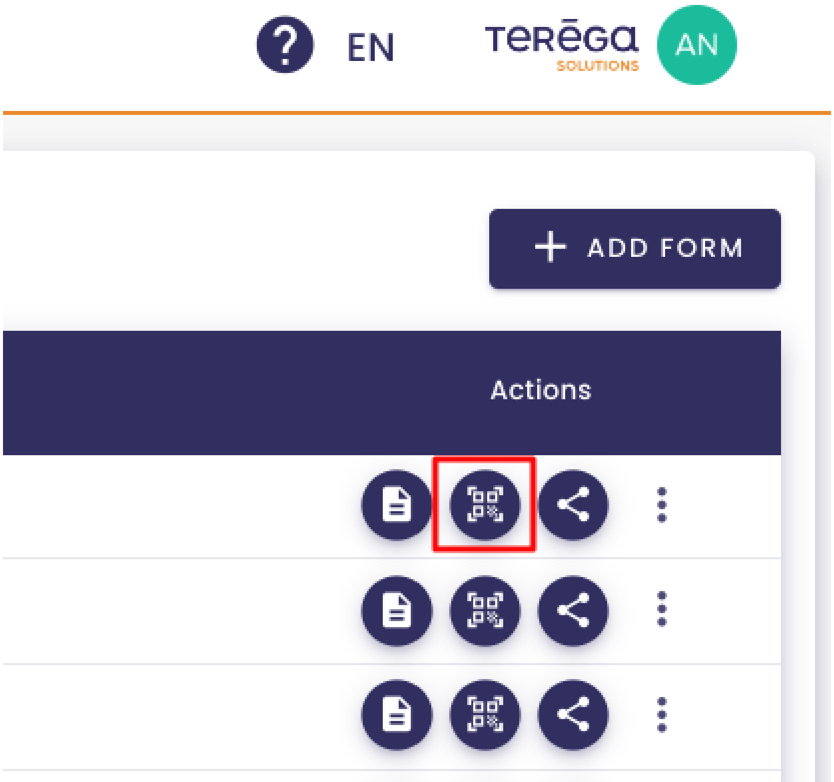
Then click on **Save.**

The changes are saved.

6. Share a form

6.1 Generate a QR Code

Go to the form you want to share and click the **QR Code** button.



A pop-up window opens.

Click **Download QR Code**.

6.2 Copy the form's link

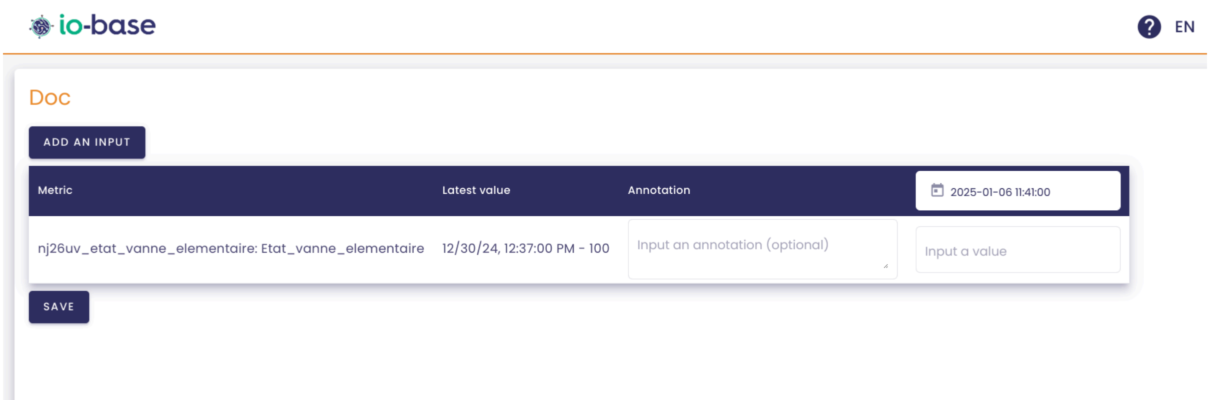
A button is available to copy a form's access link.

7. Make an input

Access the input form. There are several ways to do so :

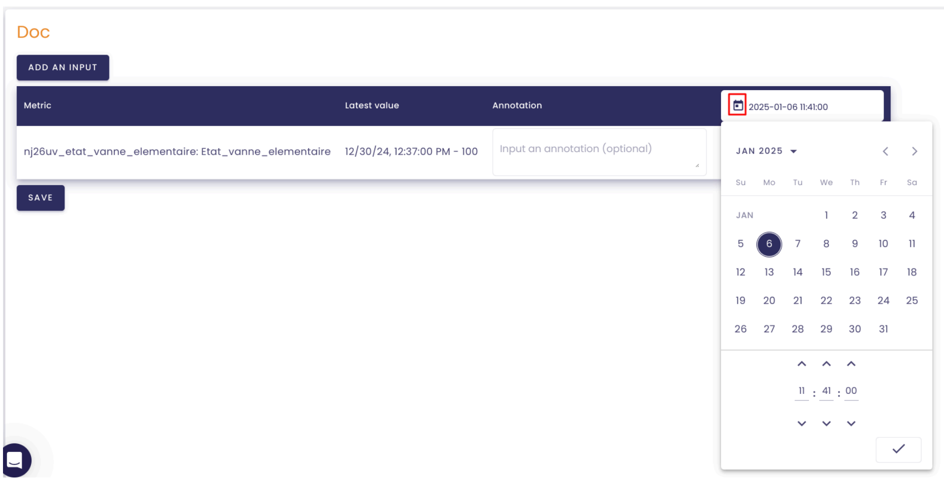
- QR Code scan
- by using the form's link
- through IndaForms with the **View form** button

You are now in the input screen.



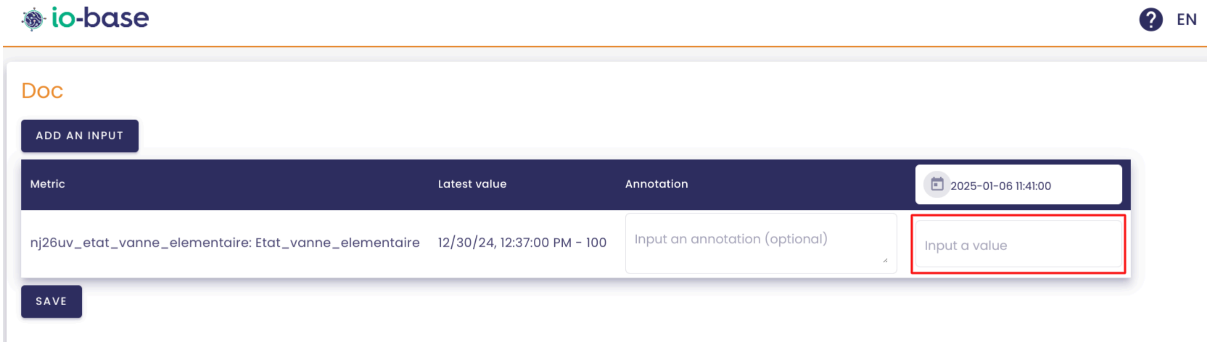
7.1 Change the input date

A calendar button is available to allow you to indicate the moment of the input.



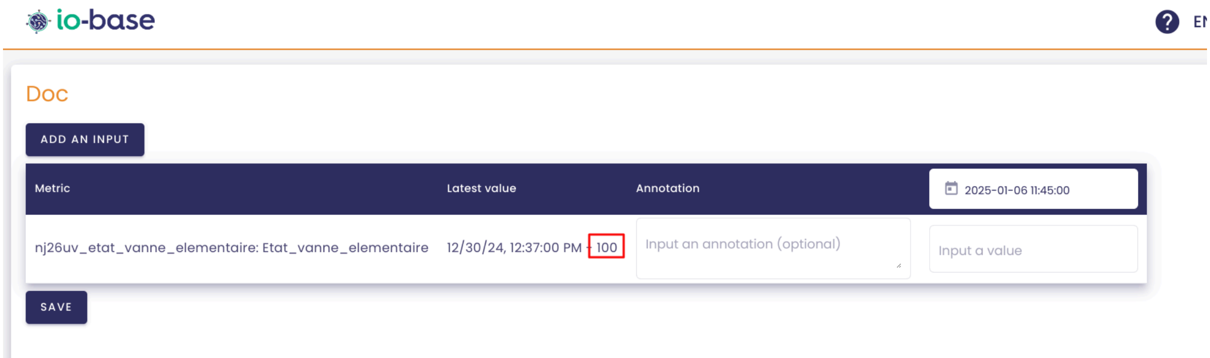
Note : By default, the date shown is the date on which you accessed the form.

You can then enter a value in the field provided.



Note : It is possible to enter an annotation for a given type "**raw**" or "**calculated**" metric.

Note : You can view the last value of a metric

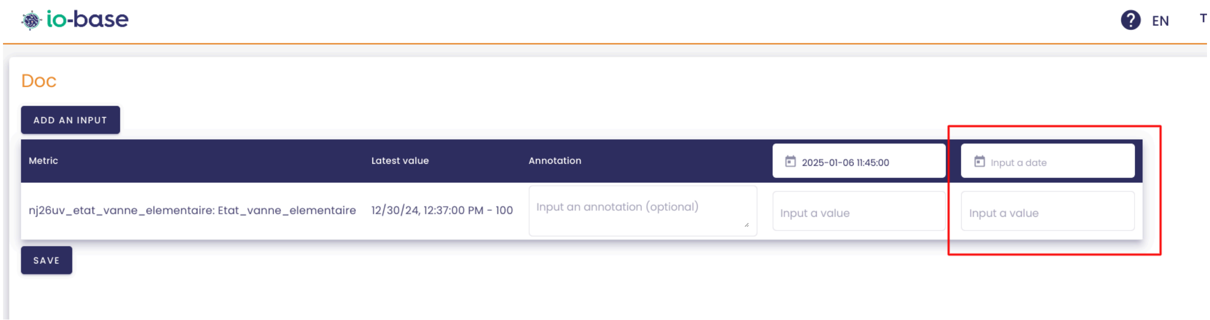


7.2 Add an input

You can add an input by clicking the **Add an input** button.

This option allows you to enter several values at once.

A new column appears in which you can make additional inputs.



Note : if you want to change a value in the database, simply enter a value for the timestamp you want to change. The entry will overwrite the previous value in the database.