



# IndaForms

## User documentation

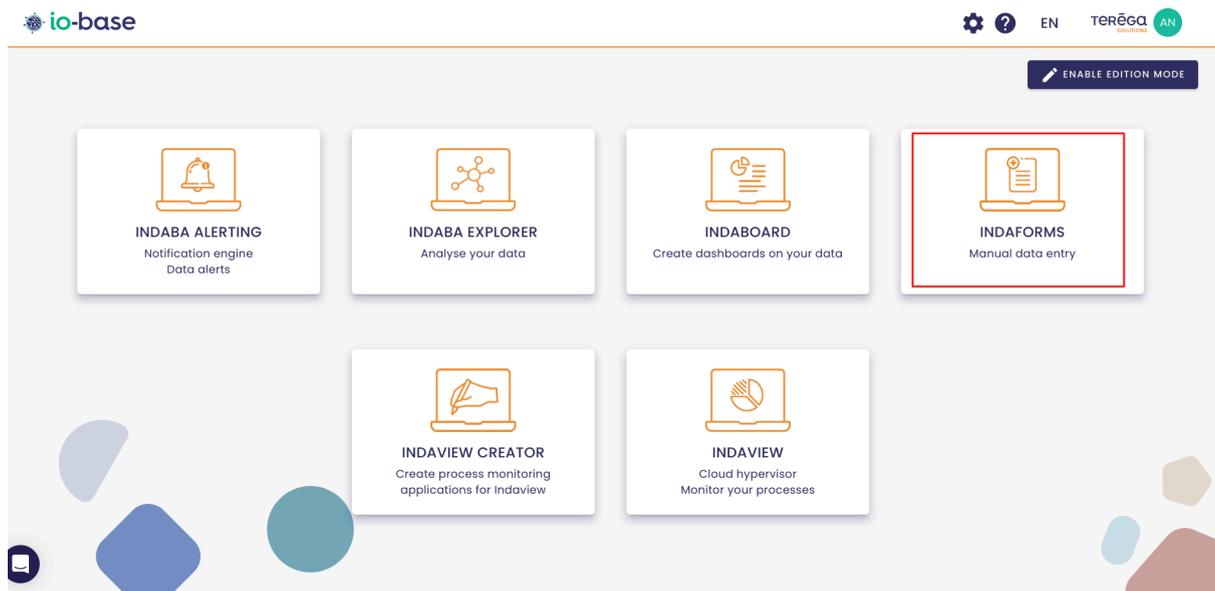
## Content

<b>Content</b>	<b>2</b>
<b>1. Access IndaForms</b>	<b>3</b>
<b>2. Create a form</b>	<b>4</b>
2.1 Defining a permission	5
2.2 Defining a metric	7
2.3 Creating a metric	10
2.4 Saving the form	13
2.5 Using the form	13
<b>3. Duplicate a form</b>	<b>13</b>
<b>4. Delete a form</b>	<b>15</b>
<b>5. Edit a form</b>	<b>16</b>
<b>6. Share a form</b>	<b>18</b>
6.1 Generate a QR Code	18
6.2 Copy the form's link	19
<b>7. Make an input</b>	<b>20</b>
7.1 Change the input date	20
7.2 Add an input	21

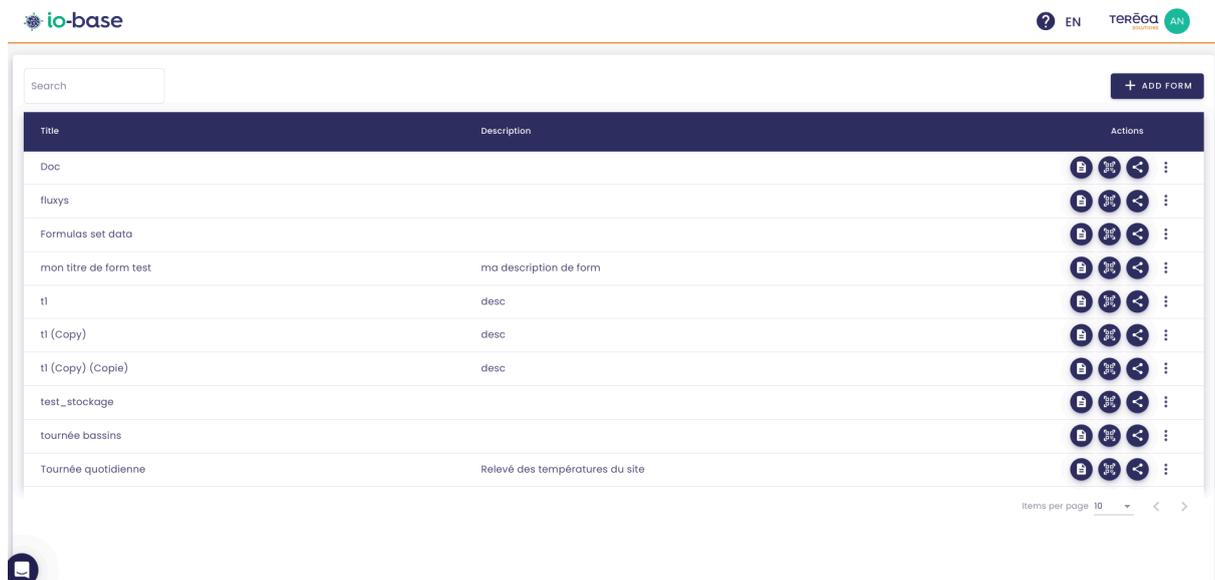
# 1. Access IndaForms

**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.](#)

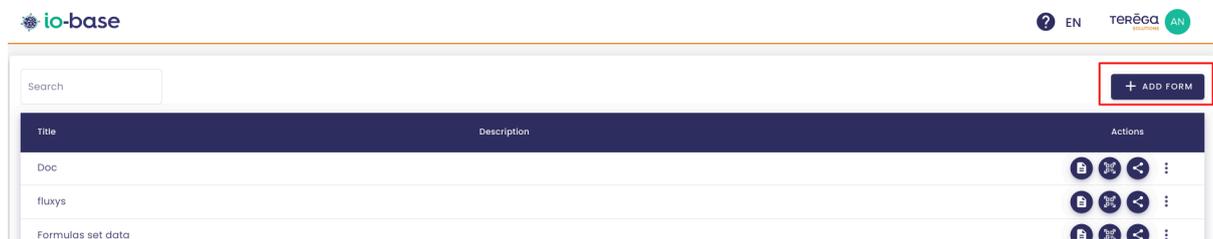
Some of the data that is important to your business is not automatically uploaded to io-base, for example when it is collected manually on a site (a thermometer that is not connected for example).

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

## Properties

Title \*

Description

## Permission

Create a new permission or use an existing one

+ CREATE A PERMISSION

Permission \*

MANAGE PERMISSION

Don't forget to add users that will fill the form in the selected permission

## Metrics

SEARCH A METRIC

+ CREATE A METRIC

SAVE

**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**.

## Properties

Title \*

Description

## Permission

Create a new permission or use an existing one

+ CREATE A PERMISSION

Permission \*

MANAGE PERMISSION

Don't forget to add users that will fill the form in the selected permission

## Metrics

SEARCH A METRIC

+ CREATE A METRIC

SAVE

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

## Create a permission

Permission name

Permission for |

SAVE

CANCEL

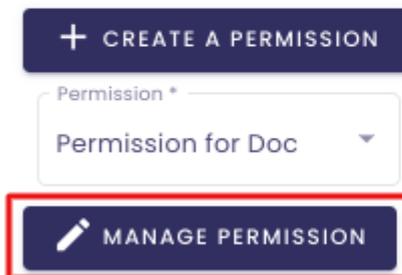
**Note** : By default, the name given is "Permission for [form title]". Therefore, by default, you will create a group specifically for your form. The permission you create is automatically set up with read/write rights.

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

To do so, click on Manage permission.

## Permission

Create a new permission or use an existing one



+ CREATE A PERMISSION

Permission \*

Permission for Doc

MANAGE PERMISSION

Don't forget to add users that will fill the form in the selected 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

**Properties**

Title \*  
Doc

Description

**Permission**

Create a new permission or use an existing one

+ CREATE A PERMISSION

Permission \*  
Permission for Doc

MANAGE PERMISSION

Don't forget to add users that will fill the form in the selected permission

**Metrics**

SEARCH A METRIC + CREATE A METRIC

SAVE

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

**METRIC SEARCH** SAVE ✕

**METRICS SELECTION**

By metric    By tree    By metadata

Datasource  
main

Metric name    Description

Unit

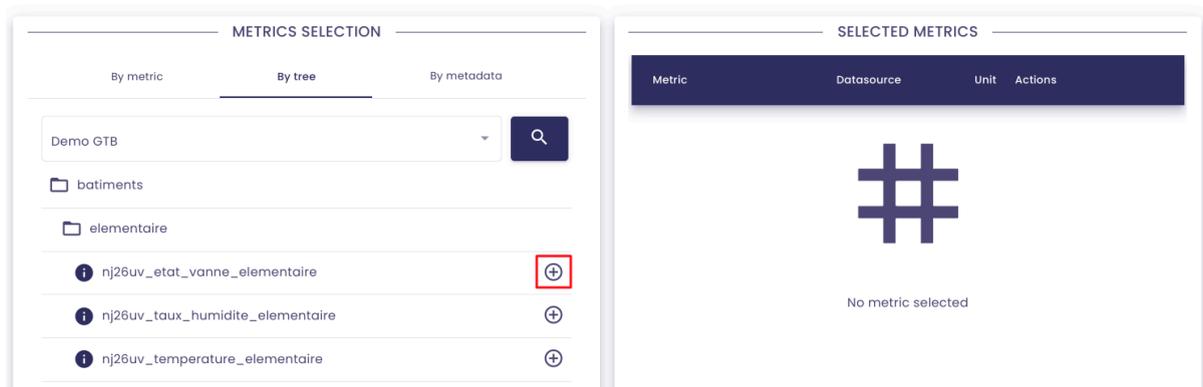
Metric	Description	Unit	Action
indabox_test_int_		j a unit	+
modbus_int_int0		j a unit	+
cip_int_170		j a unit	+
modbus_int_40100		j a unit	+

**SELECTED METRICS**

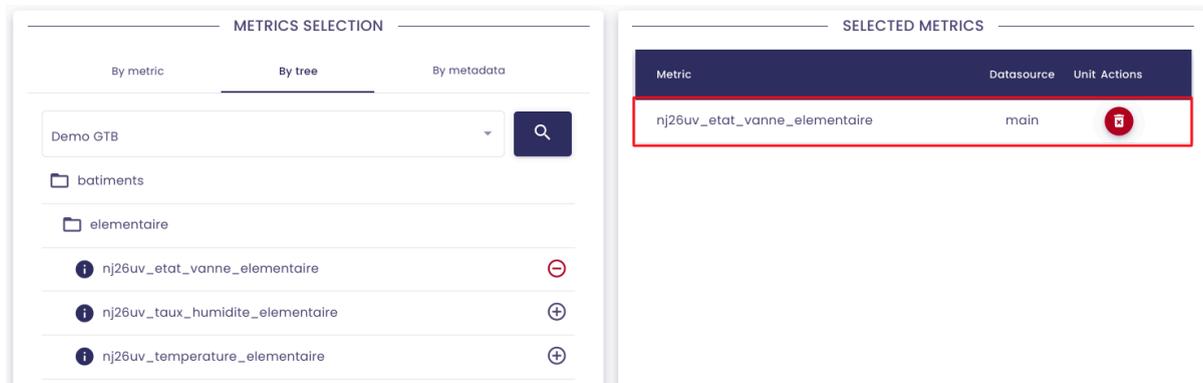
Metric	Datasource	Unit	Actions
#			
No metric selected			

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**.

## Properties

Title \*

Doc

Description

## Permission

Create a new permission or use an existing one

+ CREATE A PERMISSION

Permission \*

Permission for Doc

MANAGE PERMISSION

Don't forget to add users that will fill the form in the selected permission

## Metrics

SEARCH A METRIC

+ CREATE A METRIC

SAVE

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

**Add metric**

List of databases

Name \*

Description

Metric type

Storage rule

Unit

**Permissions list**

<input checked="" type="checkbox"/>	Default read access zone	
<input checked="" type="checkbox"/>	Default write access zone	+
<input checked="" type="checkbox"/>	Autorisation pour Marion	+
<input checked="" type="checkbox"/>	Autorisation pour Mon titre	+
<input checked="" type="checkbox"/>	Autorisation pour Test	+
<input checked="" type="checkbox"/>	autorisation_testamc	+
<input checked="" type="checkbox"/>	Dave_R	+
<input checked="" type="checkbox"/>	Ecriture Zapier	+
<input type="checkbox"/>	...	...

Items per page 10 < >

**Permissions of metric**

<input checked="" type="checkbox"/>	Default read access zone	<input type="checkbox"/>
-------------------------------------	--------------------------	--------------------------

CANCEL SAVE

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**.

## Add metric

List of databases	Metric type Manual
Name *	Storage rule
Description	Unit

### Permissions list

<input checked="" type="checkbox"/>	Default read access zone	
<input checked="" type="checkbox"/>	Default write access zone	+
<input checked="" type="checkbox"/>	Autorisation pour Marion	+
<input checked="" type="checkbox"/>	Autorisation pour Mon titre	+
<input checked="" type="checkbox"/>	Autorisation pour Test	+
<input checked="" type="checkbox"/>	autorisation_testamc	+
<input checked="" type="checkbox"/>	Dave_R	+
<input checked="" type="checkbox"/>	Ecriture Zapier	+
<input type="checkbox"/>	...	.

Items per page 10 < >



### Permissions of metric

<input checked="" type="checkbox"/>	Default read access zone	<input type="checkbox"/>
-------------------------------------	--------------------------	--------------------------

CANCEL

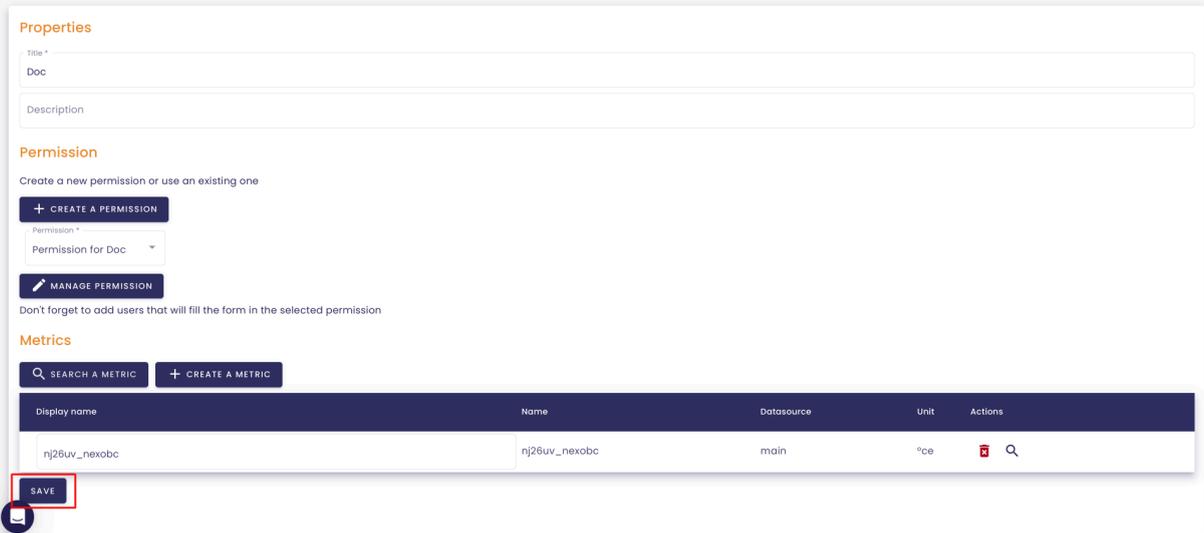
SAVE

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**.



The screenshot shows a form creation interface with three main sections: Properties, Permission, and Metrics. The Properties section has fields for Title (Doc) and Description. The Permission section has a 'CREATE A PERMISSION' button, a dropdown menu showing 'Permission for Doc', and a 'MANAGE PERMISSION' button. The Metrics section has a search bar and a 'CREATE A METRIC' button. Below these sections is a table with columns: Display name, Name, Datasource, Unit, and Actions. The table contains one row with the following data: Display name: nj26uv\_nexobc, Name: nj26uv\_nexobc, Datasource: main, Unit: °ce, Actions: [trash icon, search icon]. A red box highlights the 'SAVE' button at the bottom left of the interface.

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.

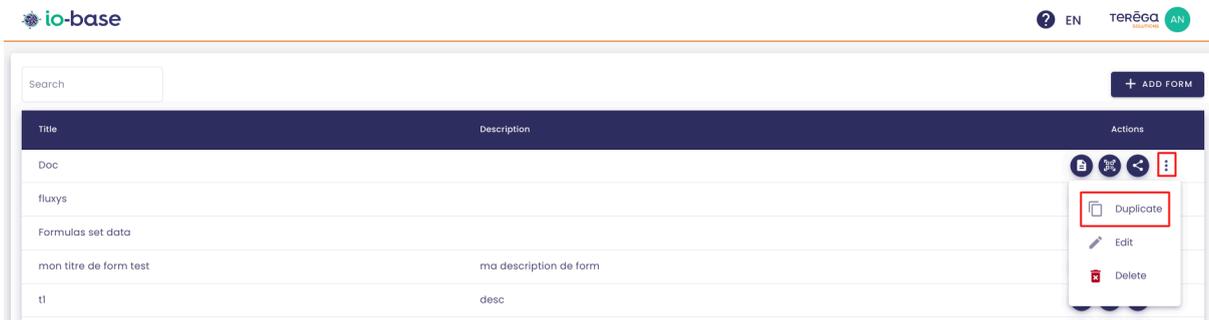
## 3. Duplicate a form

[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**.



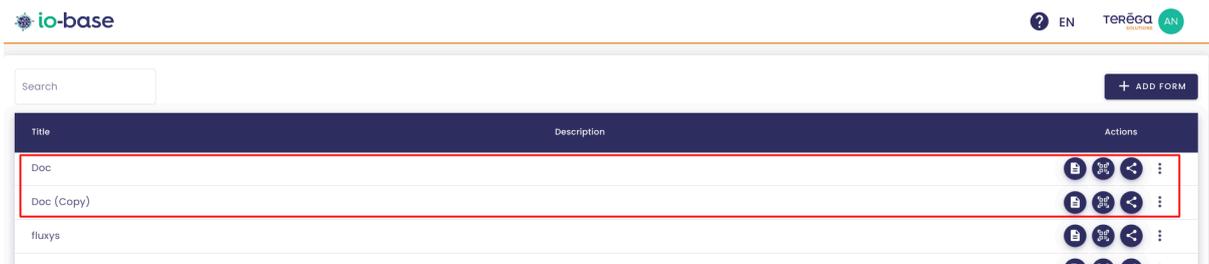
## Duplicate form ?

Are you sure you want to duplicate form doc ?

CANCEL

DUPLICATE

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



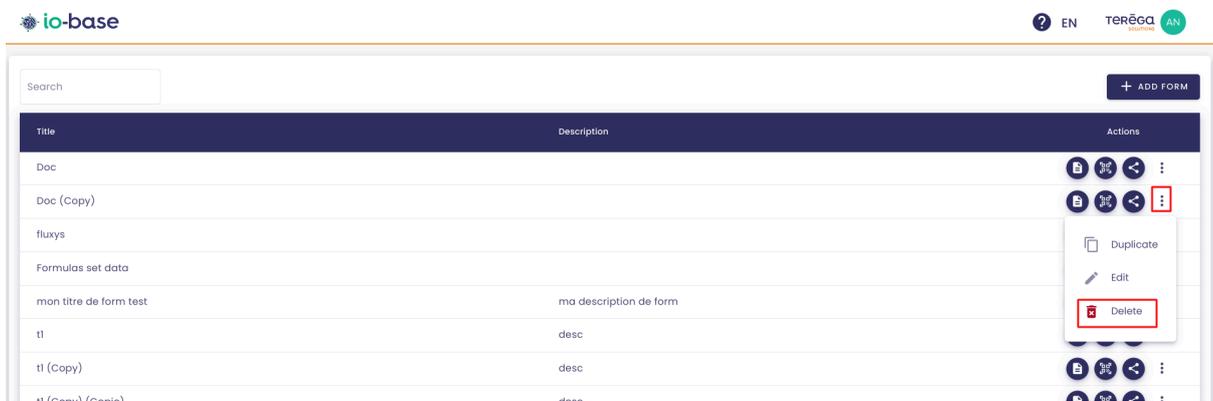
## 4. Delete a form

[Access IndaForms.](#)

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



Then click **Delete**.



The screenshot shows the io-base interface. At the top left is the io-base logo. At the top right are language options (EN) and a user profile (TEREGG AN). Below the header is a search bar and an "ADD FORM" button. The main area is a table with columns "Title", "Description", and "Actions". The table contains several rows of form entries. A context menu is open over the "Doc (Copy)" row, showing options: Duplicate, Edit, and Delete. The "Delete" option is highlighted with a red box.

Title	Description	Actions
Doc		[Icons]
Doc (Copy)		[Icons] [Delete]
fluxys		[Icons]
Formulas set data		[Icons]
mon titre de form test	ma description de form	[Icons]
tl	desc	[Icons]
tl (Copy)	desc	[Icons]
tl (Copy) (Copy)	desc	[Icons]

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



### Confirm deletion ?

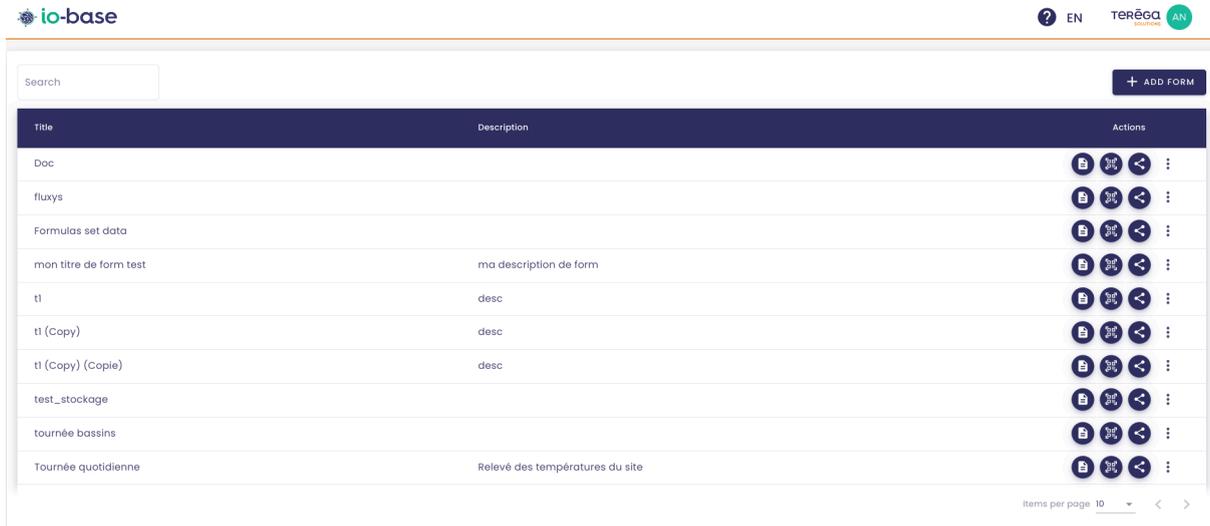
Are you sure you want to delete  
form doc (Copy) ?

CANCEL

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.



The screenshot shows the io-base interface with a search bar and a table of forms. The table has columns for Title, Description, and Actions. The form 'Doc (Copy)' is not present in the list.

Title	Description	Actions
Doc		[Icons]
fluxys		[Icons]
Formulas set data		[Icons]
mon titre de form test	ma description de form	[Icons]
tl	desc	[Icons]
tl (Copy)	desc	[Icons]
tl (Copy) (Copie)	desc	[Icons]
test_stockage		[Icons]
tournée bassins		[Icons]
Tournée quotidienne	Relevé des températures du site	[Icons]

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

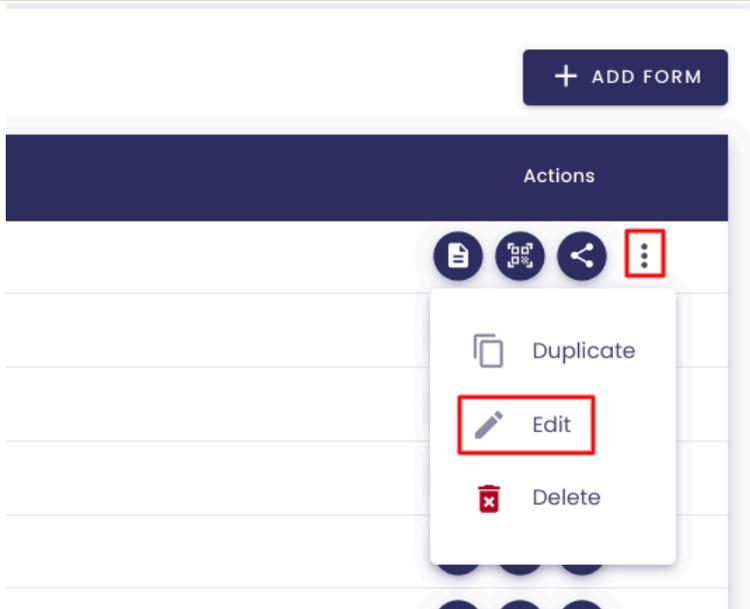
## 5. Edit a form

[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](#) .



---

### Properties

Title \*  
Doc

Description

### Permission

Create a new permission or use an existing one

**+ CREATE A PERMISSION**

Permission \*  
Autorisation pour doc ▾

**MANAGE PERMISSION**

Don't forget to add users that will fill the form in the selected permission

### Metrics

**SEARCH A METRIC** **+ CREATE A METRIC**

Display name	Name
nj26uv_etat_vanne_elementaire: Etat_vanne_elementaire	nj26uv_etat_

**SAVE**



Modify the items you want.

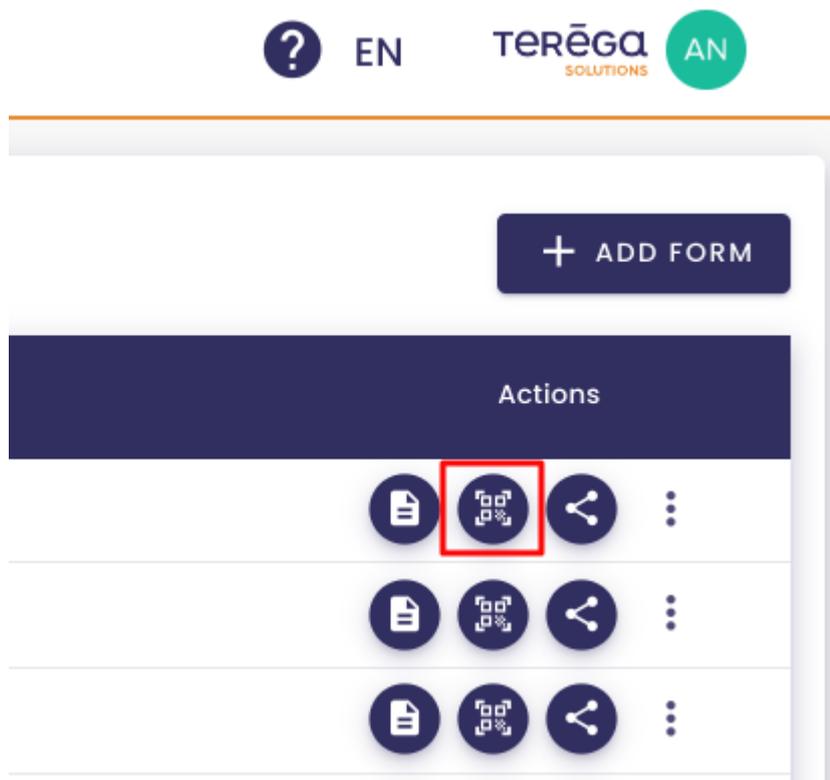
Then click on **Save**.

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.

## Test - QR code generation



DOWNLOAD QR CODE

CLOSE

Click **Download QR Code**.

## 6.2 Copy the form's link

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

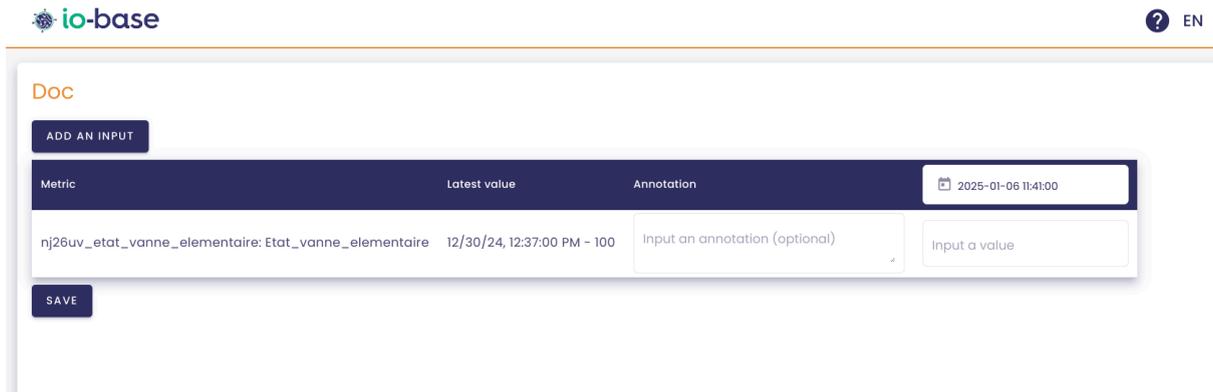


## 7. Make an input

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

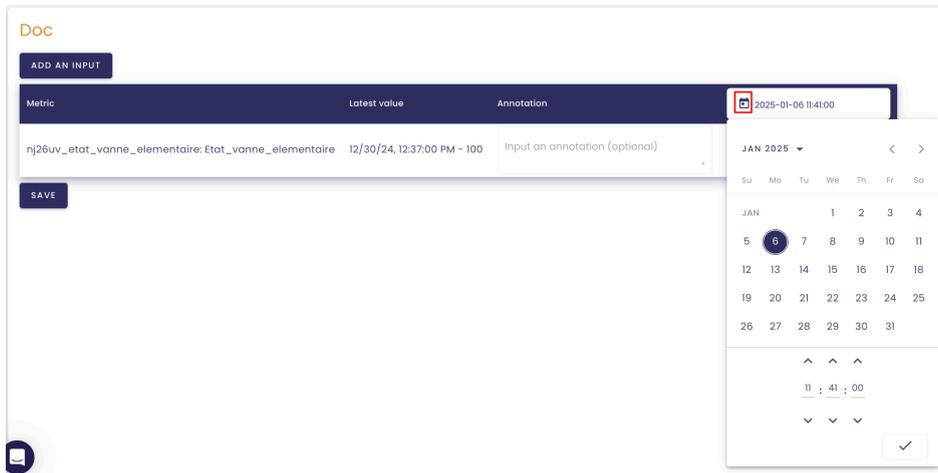
You are now in the input screen.



The screenshot shows the 'io-base' interface. At the top left is the 'io-base' logo, and at the top right is a language selector showing 'EN'. Below the header, the word 'Doc' is displayed. A dark blue button labeled 'ADD AN INPUT' is positioned above a table. The table has three columns: 'Metric', 'Latest value', and 'Annotation'. The 'Metric' column contains the text 'nj26uv\_etat\_vanne\_elementaire: Etat\_vanne\_elementaire'. The 'Latest value' column shows '12/30/24, 12:37:00 PM - 100'. The 'Annotation' column contains the text 'Input an annotation (optional)'. To the right of the table is a date and time selector showing '2025-01-06 11:41:00'. Below the table is a text input field with the placeholder 'Input a value' and a 'SAVE' button.

## 7.1 Change the input date

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



This screenshot shows the same input form as above, but with a calendar overlay open. The calendar is for 'JAN 2025' and shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa). The date '6' is selected. Below the calendar, there is a time selector showing '11 : 41 : 00'. A checkmark button is visible at the bottom right of the calendar overlay.

**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.

## Doc

ADD AN INPUT

Metric	Latest value	Annotation	2025-01-06 11:41:00
nj26uv_etat_vanne_elementaire: Etat_vanne_elementaire	12/30/24, 12:37:00 PM - 100	Input an annotation (optional)	Input a value

SAVE

**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

## Doc

ADD AN INPUT

Metric	Latest value	Annotation	2025-01-06 11:45:00
nj26uv_etat_vanne_elementaire: Etat_vanne_elementaire	12/30/24, 12:37:00 PM - 100	Input an annotation (optional)	Input a value

SAVE

## 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.

Doc

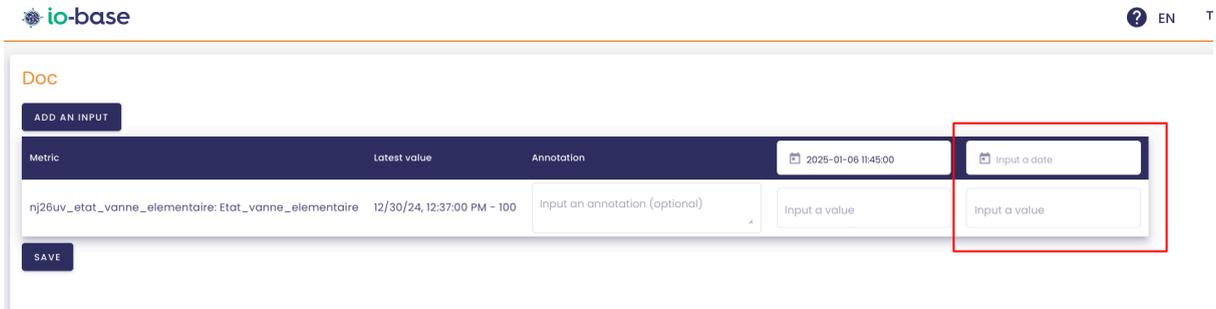
ADD AN INPUT

Metric

nj26uv\_etat\_vanne\_elementaire: Etat\_vanne\_elementaire

SAVE

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



The screenshot shows the io-base interface. At the top left is the io-base logo, and at the top right are the characters "? EN T". Below the header, the word "Doc" is displayed. On the left side, there is a dark blue button labeled "ADD AN INPUT". The main area contains a table with the following structure:

Metric	Latest value	Annotation	2025-01-06 11:45:00	Input a date
nj26uv_etat_vanne_elementaire: Etat_vanne_elementaire	12/30/24, 12:37:00 PM - 100	Input an annotation (optional)	Input a value	Input a value

Below the table is a dark blue button labeled "SAVE". A red rectangular box highlights the "Input a date" field in the table's header and the corresponding "Input a value" field in the table's body.

**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.