DIGIMAKER 6.0

Digimaker 6.0
How to guides

1.1 How to create e-Form Views

A view is a filtered list of all the records that are available in each application form database. These views are the basic building blocks for more advanced use of the e-Forms. By creating the necessary views, you can maintain a customer database, an inventory or any sort of information that may be useful to store in a database.

It is possible to insert information into the database from the Digimaker administration interface or from online forms on the website, allowing information to be collected automatically from online users.

1.1.1 Accessing the Viewbuilder

To access a view of a form:

1. Select a forms category to list all the forms in the category.
2. Select the form whose view you want to access.
3. Click on the **Report** link.

The standard view called **SELECT ALL** displays all fields/columns and all records available in the forms database. A maximum of 15 records is displayed per page. To view more records, click on the **Next** button or the number of the page located at the left bottom of the page.

Switch view by selecting a new view from the **Current View** drop-down list.

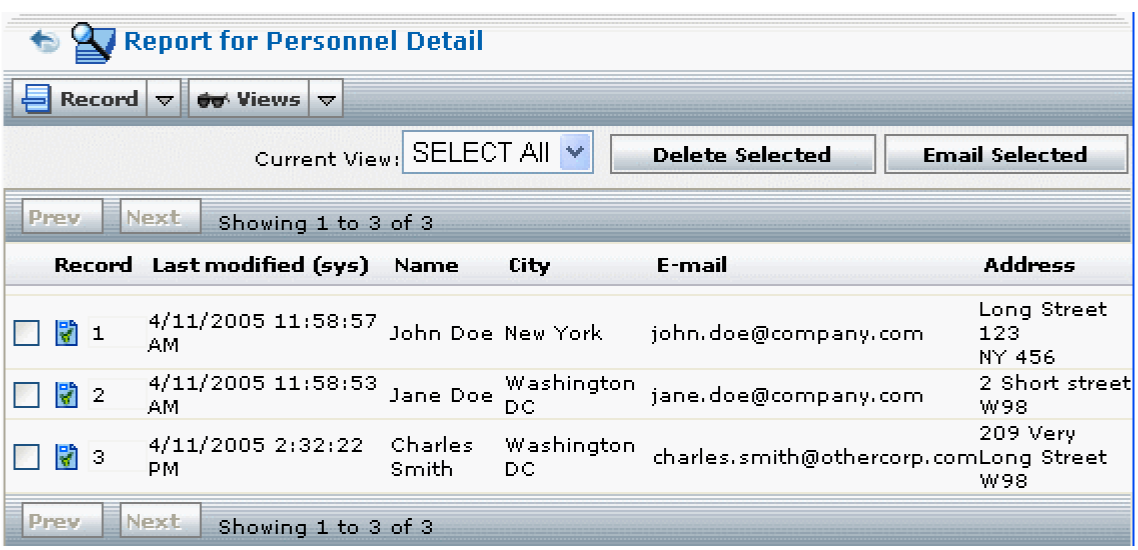

Figure 1: Report

Adding a record

To add a record, move the mouse on the **Record** button and select **Add record** from the pop-up menu.

Editing a record

To edit the values in a record:

1. Click on the record reference number and select **Edit** from the **pop-up** menu. The record opens in the edit mode.
2. Edit the values and click **Submit**.

Deleting a record

To delete a record, click on the **pop-up** associated with the record number and then select **Delete** from the **pop-up** menu or select the check box and then click on the **Delete Selected** button.

1.1.2 Building the View

Step 1: Choose any of the methods to select the form to build the view:

1. Click on the category where the form whose view you want to create is located.
2. Move the mouse over the category and choose List Content from the drop down menu.
3. Select **Search e-Forms** from the shortcut menus in the Workspace.

Step 2: Click on the **Report** link of the form. The default view called **SELECT ALL** contains all the fields selected from the form. If you have created any views for this form, all of them are listed in the **Current View** drop-down list.

Step 3: Move the mouse over the **View** button and select **Add view** from the list **(Figure 2)**.

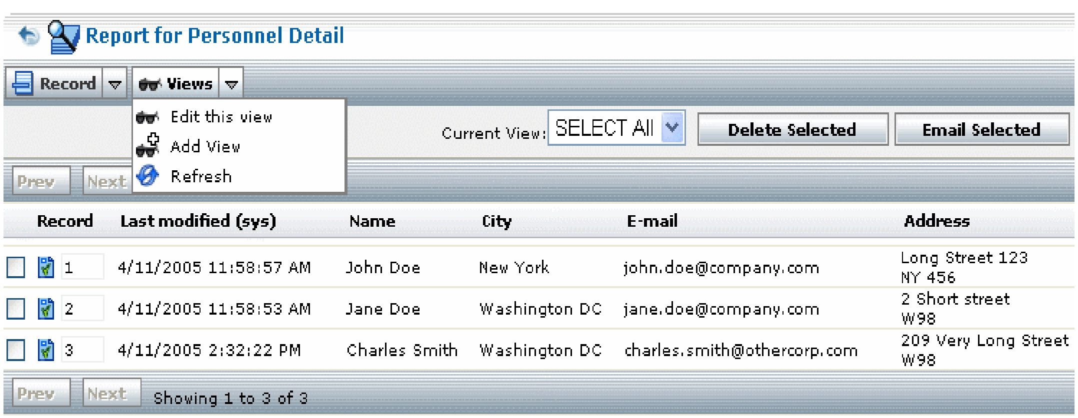

Figure 2: Add view from View menu

The **Viewbuilder (Figure 3) Workspace** is displayed. You can select those fields that you want to display in the view. You can also filter records as per your criteria and sort the display in any order that you want.

The **Viewbuilder Workspace** can be divided into three parts based on the functionalities (Please refer to the red marking in the figure to distinguish the different parts).

- The first part is used to name the view and select the fields for displaying the view.
- The second part is used to filter the records based on specified criteria. Although it makes use of the query function of SQL, the interface is so intuitive that anybody with little or no knowledge of databases can easily specify criteria.
- The third part is used to sort the display of records.

The following are the fields of Viewbuilder:

Part 1

Existing e-Form Fields lists all the fields in the form. Select the fields that you want to display in the view and click on the **Add** button. These fields are added to the Fields in View list box. To select a field, click on the name, **Ctrl+Click** to select multiple fields.

View Name allows you to enter a name for the view. It is suggested that you provide a descriptive name that maps to the functionality of the view.

Fields in View contains the fields selected from **Existing e-Form Fields** to be displayed in the view.

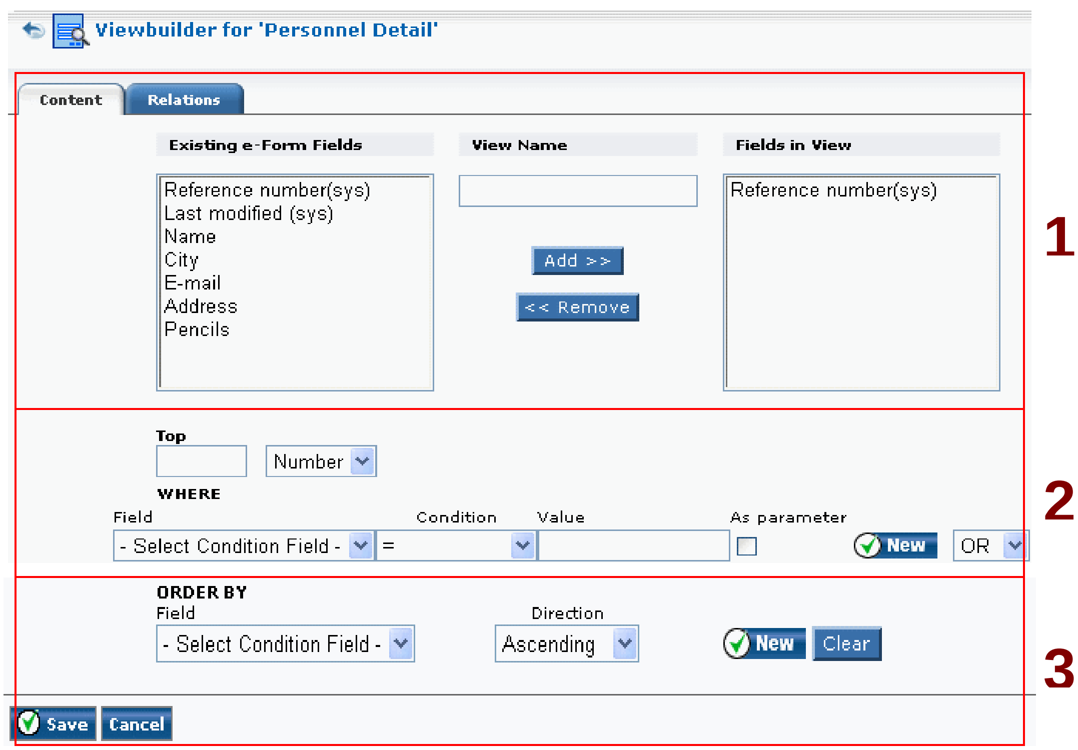

Figure 3: Viewbuilder

Part 2

Top specifies the number records that are to be displayed in the view. You can specify either a number or the percentage using the drop-down list.

Field allows you to select condition field from the list of fields in the drop-down list.

Condition allows you to choose from the various conditions that clearly help filter the records.

Value allows you to specify a value that is associated with the **condition.**

For example, let us assume that one of the fields in **Field** is 'severity'. Now, if you choose the condition field as 'severity' and condition as '=', enter 'low' as value. So, all the records with the 'severity as low' are displayed.

As parameter

This is used when you want to change the value during runtime.

Consider the previous example where we had specified that criteria as 'Severity = low'. Now select the 'As parameter' checkbox. When you select this view from the view list, you will be asked to supply a parameter as shown in **(Figure 4: Viewbuilder - As Parameter)**.

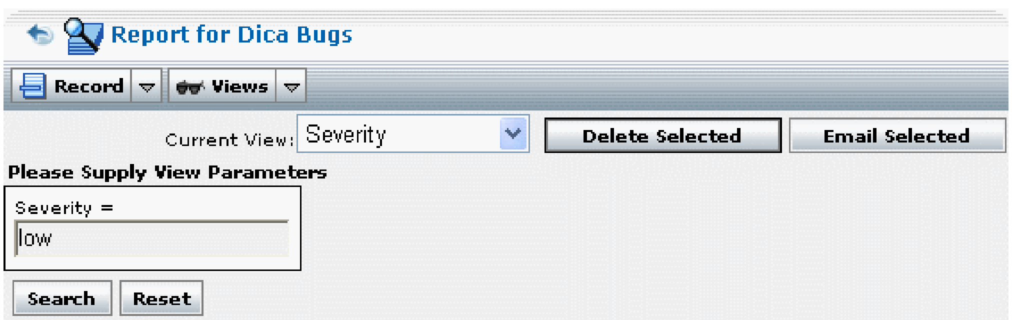

Figure 4: Viewbuilder - As Parameter

Since the value was specified as 'low' while saving the view, the same value appears as default value. You can supply a different value and click search to see the records that match the criteria. If the value field is left blank, the no default value is displayed during runtime.

New allows you to add as many 'where conditions' as you want using the **New** button.

Part 3

Field allows you to select a field from the drop-down list based on which the records are ordered by.

Direction displays the records in ascending or descending order.

Step 4: Click **Save** to return to the report views.

1.1.3 Deleting a View

Select a view from the drop-down, the click **Delete selected** to remove the view. Please note that this deletes only the view and not the records.

1.2 How to E-mail Views

Step 1: Select the view from **Current View** drop-down list and select the records from the view by selecting the check-boxes on the left of every record.

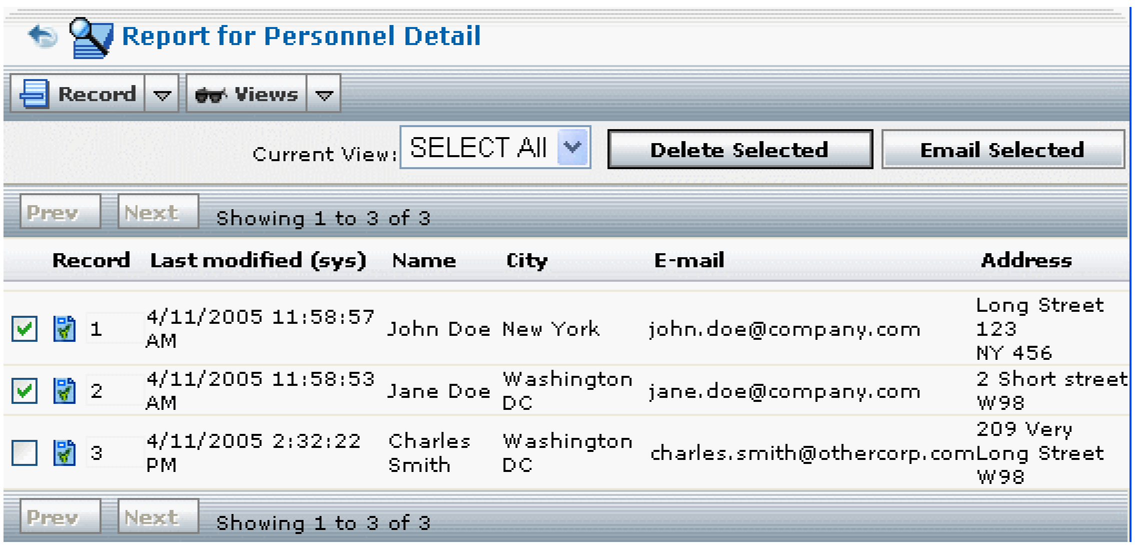

Figure 5: Selecting Records from a view for emailing

Step 2: Click on the **Email Selected** button. The **Email Properties window (***Figure 6***)** is displayed.

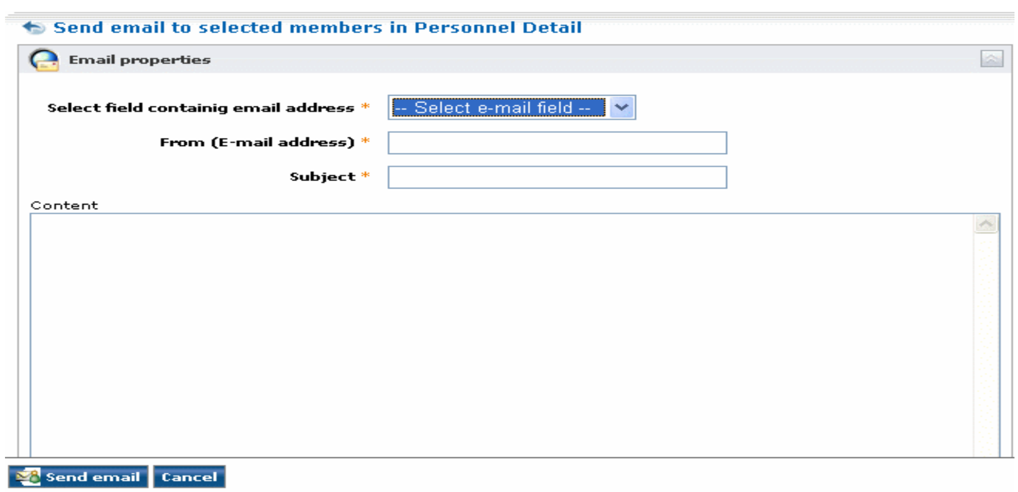

Figure 6: Email Properties

Step 3: Enter values for the fields. Make sure that you fill in all the mandatory fields that are marked by a *. The different fields are as follows:

- **Select Field containing email addresses (Mandatory field)** drop-down list contains all the fields in the selected records. Select the field that represents e-mail address.
- **From Email Address (Mandatory field)** is the address to which the recipients can respond to. This e-mail address appears in the 'From' field of the recipient's e-mail.
- **Subject (Mandatory field)** allows you to enter the subject that is representative of the content of the e-mail. This appears in the 'Subject' field of the recipient's e-mail.
- **Content** allows you to type in the content of the e-mail.

Step 4: Click **Send e-mail**, located at the bottom left of the Workspace to send the e-mail.

1.3 How to Create a Chart from a e-Form

Data from a form may be displayed as graphs and charts, similar to charts in Excel. Creating a chart involves the following steps:

- Accessing the charts builder
- Creating the chart

Step1: The first step is accessing the charts builder from the e-form. Choose any of the methods to select the e-form to create a view:

- Click on the category where the e-form whose view you want to create is located.
- Move the mouse over the category and choose List Content from the drop down menu.
- Select **Search e-E-forms** from the shortcut menus in the Workspace.

Figure 7: Accessing the Charts builder

Step 2: Click on the **Chart link (Figure 7)**. The **Chart Builder Workspace (Figure 8)** is displayed.

Step 3: The third step is to create the chart by filling in all the fields in the 'Chart builder'. The **Chart Builder Workspace** is made of three tabs – ***Build Chart, Preview,*** and ***History***. By default, **Build Chart** is selected when the **Chart Builder Workspace** opens.

Build Chart

This tab can be divided into two sections. The first part contains the general properties of the chart such as name of the chart, height, etc. You also define the grid lines and axis titles along with comments for the chart.

The second section titled **Chart Operation** contains the settings for data that needs to be included in the chart and the way the values should be counted.

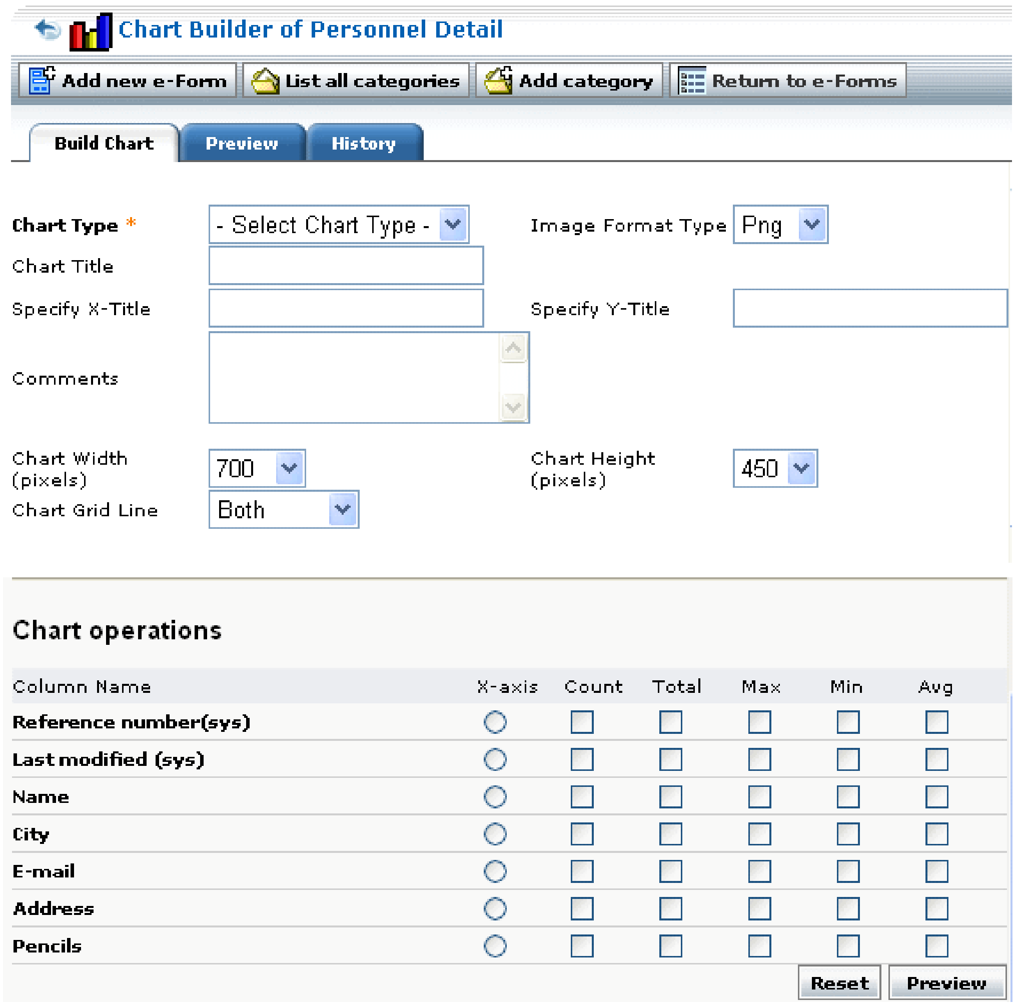

Figure 8: Chart Builder

The fields in **Build Chart** are as follows:

- **Chart type** allows you to ddefine the type of chart you want to create using the values. The options are line charts (Simple, smooth), area charts, bar charts, stacked charts, and pie charts.
- **Image E-format Type** allows you to choose the e-format that the chart should be saved as. PNG is selected as default but if you have trouble copying and pasting your image into your word processor or other programs, select another e-format and try again.

- **Chart title** is the chart title would appear above the chart and should be descriptive for the chart.
- **Specify X-title** the X-title and appears horizontally on the left side of the x-axis of the chart.
- **Specify Y-title** the Y-title and appears horizontally below the y-axis of the chart.
- **Comments** do not appear in the chart image but is retrievable in the website.
- **Chart Width (pixels)** is the width of the chart in pixels. Experiment with different sizes to get the best result.
- **Chart Height (pixels)** is the height of the chart image in pixels. Experiment with different sizes to get the best result.
- **Chart Grid Line** offers you the ability of displaying the charts with grids or plain charts. If you want a chart with grids enabled, apart from displaying both the grid lines, you can also choose to display only vertical or horizontal grid lines

Chart Operations

Column name lists all the fields in the selected e-form. These values are to be plotted in the chart. Select one of the values for X-axis. These fields can also be categorized as numerical and non-numerical values. Based on the type of field that you have chosen the rest of the options are enabled or disabled. It applies to both Non-numerical and numerical values

Count displays the total number of occurrences of a value in the chosen column. For example, let us assume that the chart type is ‘bar charts’ and if a column contains three values, where two have the value “Washington” and one is “New York”, the chart displays one column for each city – the column for Washington would be displayed with the value “2” and the column for New York with the value “1”.

It is only possible to count values in one column at a time in the chart but the values from this column can be displayed in up to five different ways at the same time.

Note! Although count applies to both non-numerical fields and numerical fields, only this field is applicable to non-numerical values. It applies to Numerical values only.

Total displays the sum for a given column. The column must contain only numerical values.
Max finds the highest value available in the selected column.
Min finds the lowest value available in the selected column.
Avg finds the average value in the selected column.

Bar chart legend

The bar chart legend attempts explain the different parts of the chart that was created using the Chart builder.

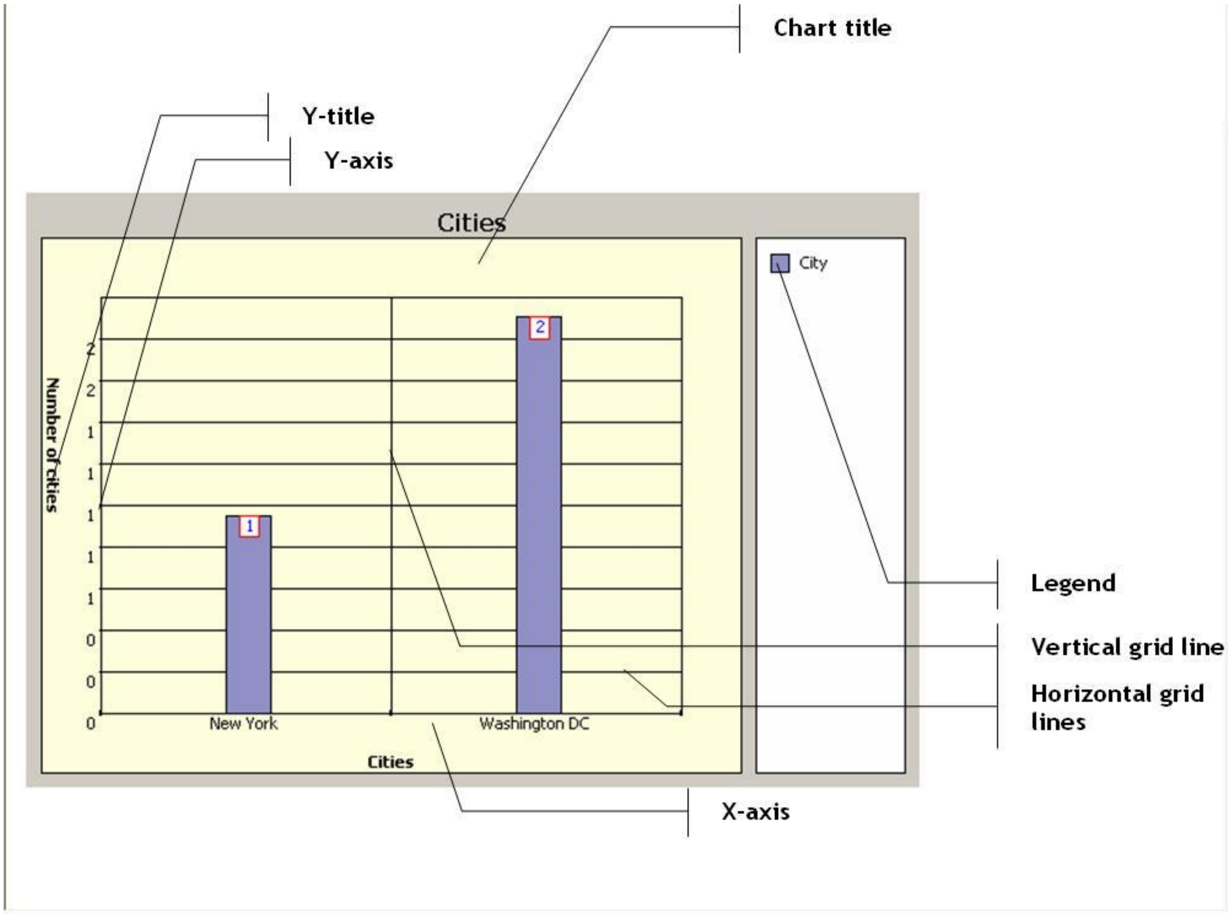

Figure 9: Bar Chart Legend