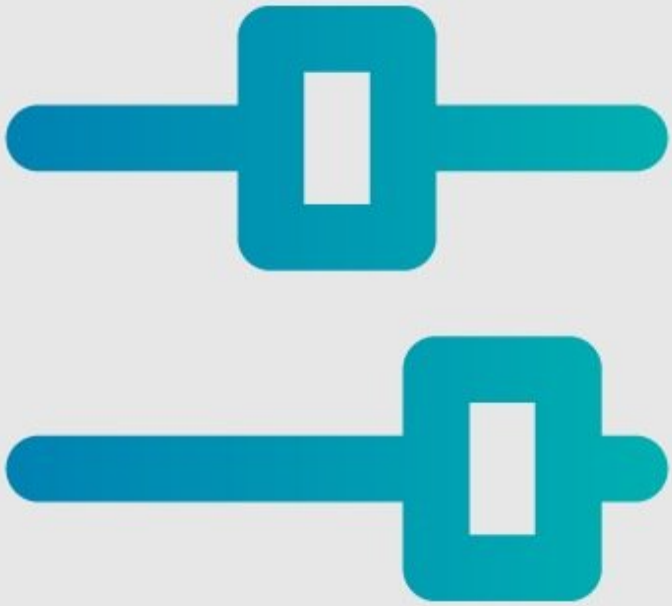
How to Add Data Capture Forms to a Guide

This guide demonstrates how to add customizable data forms to a guide page that are completed by the user in Operator View.

Written By: Dozuki System



INTRODUCTION

This guide demonstrates how to add customizable data capture forms to a guide page that are completed by the user in Operator View.

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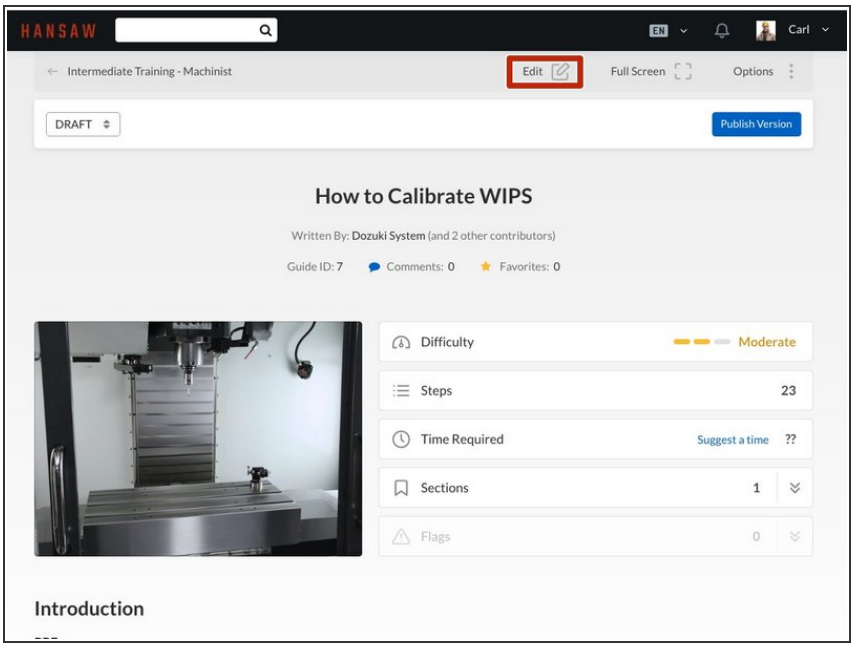
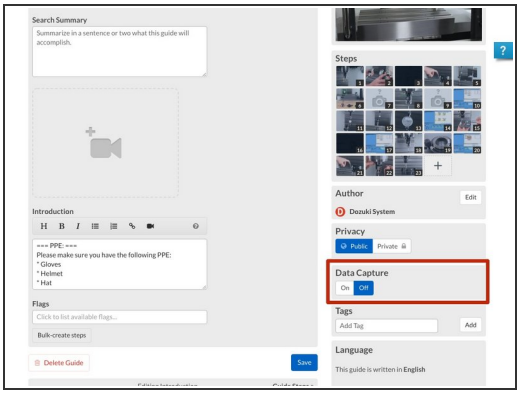
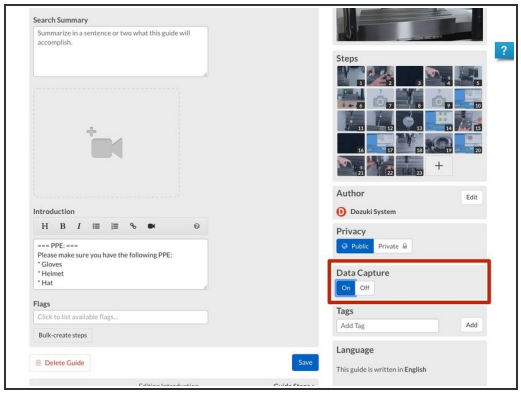
Step 1 — Open Guide Edit Page

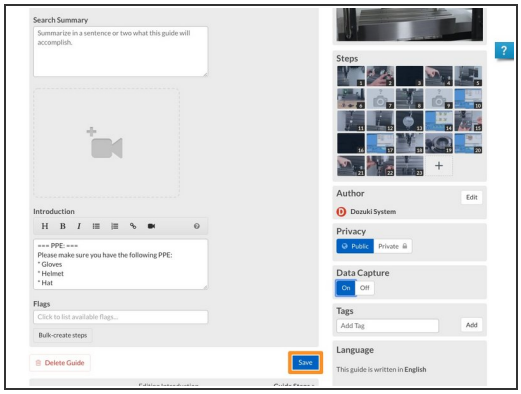


- Click on the **Edit** button at the top-right of the guide page, just beneath the site header.

Step 2 — Select Data Capture







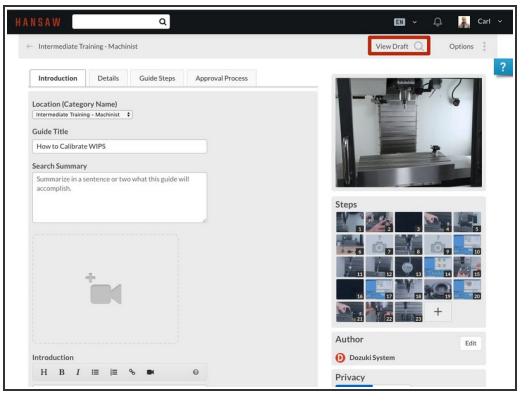
- Scroll down and toggle the Data Capture to **On**.

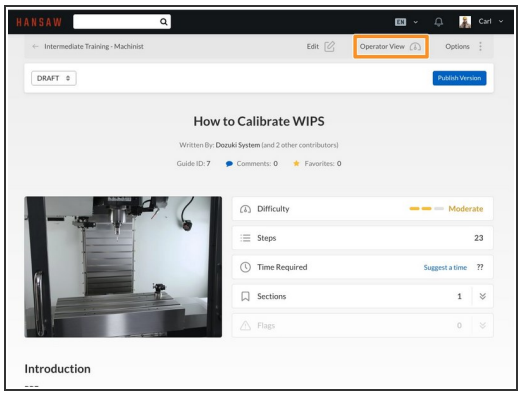
  Operator View is an element of the Data Capture feature in Dozuki Guides, so it is not accessible until Data Capture is enabled.

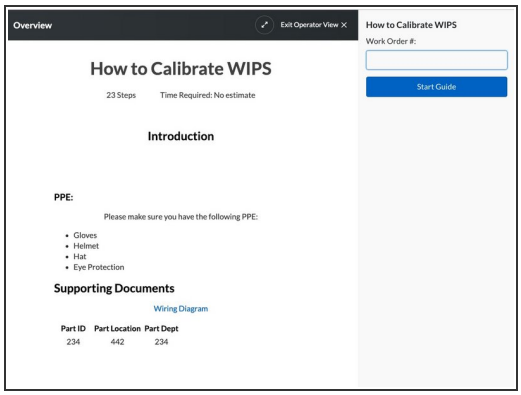
- Click on the **Save** button.

  Refreshing the page after saving will reveal the Data Capture fields underneath each step.

Step 3 — Accessing Operator View

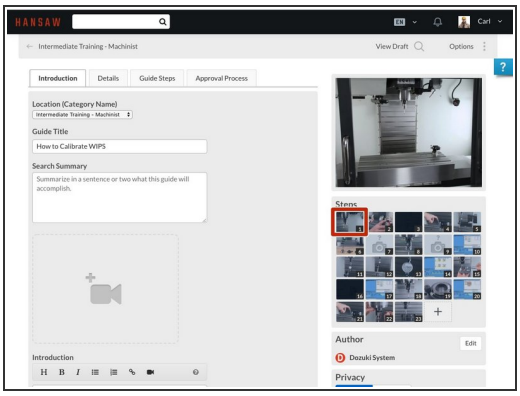


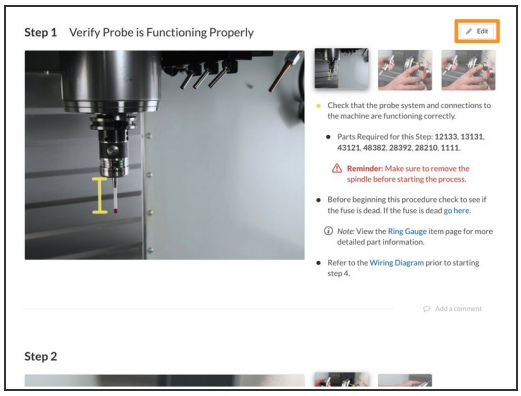


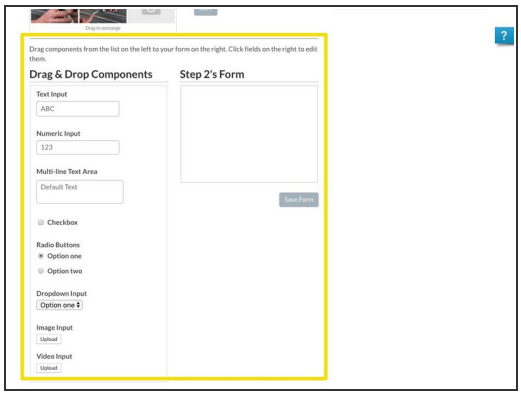


- To access the guide in Operator View:
  - Click **View Draft** from the top-right of the guide.
    - **Operator View** will now display at the top of the guide screen.
  - Select **Operator View**.

Step 4 — Edit Step







- In the Guide Edit screen, click on the thumbnail of the step that you want to edit.
  - To edit individual steps from Guide View, click on the **Edit** button on the upper-right of the page.
- Scroll down to the **Drag & Drop Components** and **Step Form** fields.

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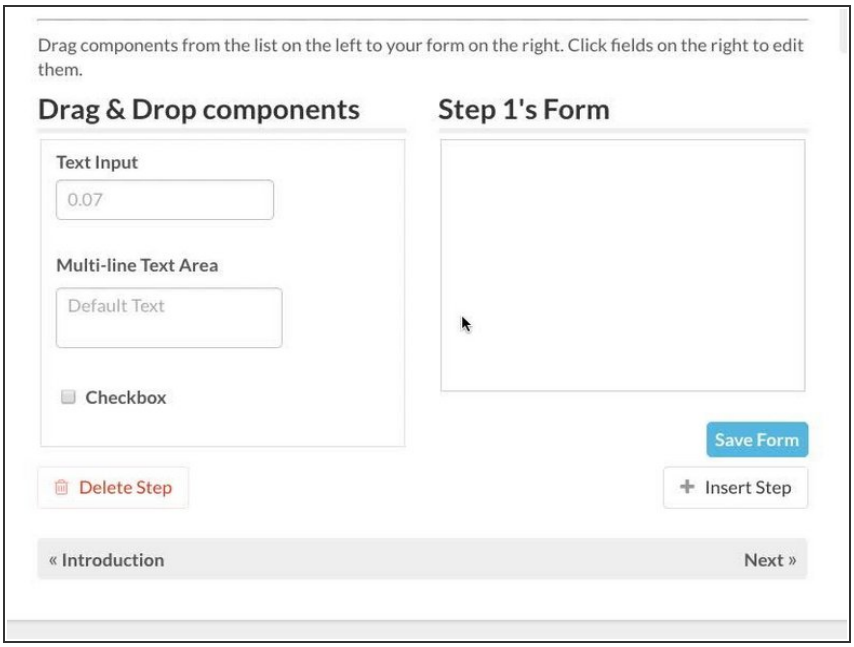
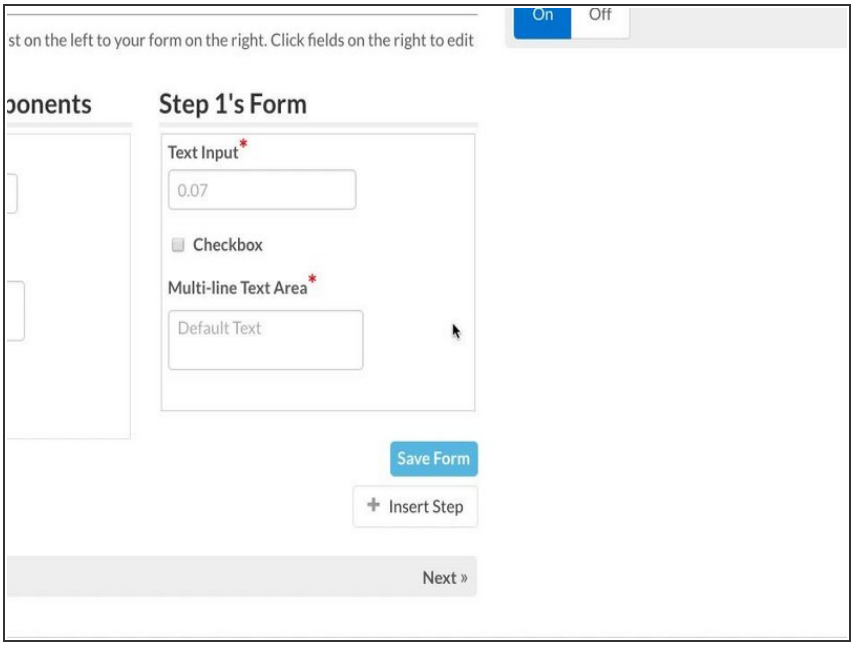
Step 5 — Drag & Drop Components



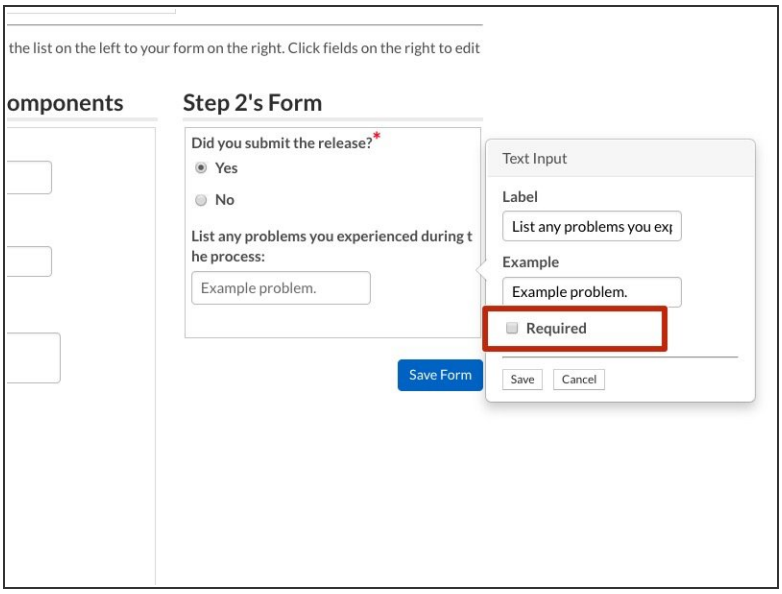
- Click on the components that you want to use from the **Drag & Drop Components** box on the left. Drag and drop them in the **Step Form** box on the right.

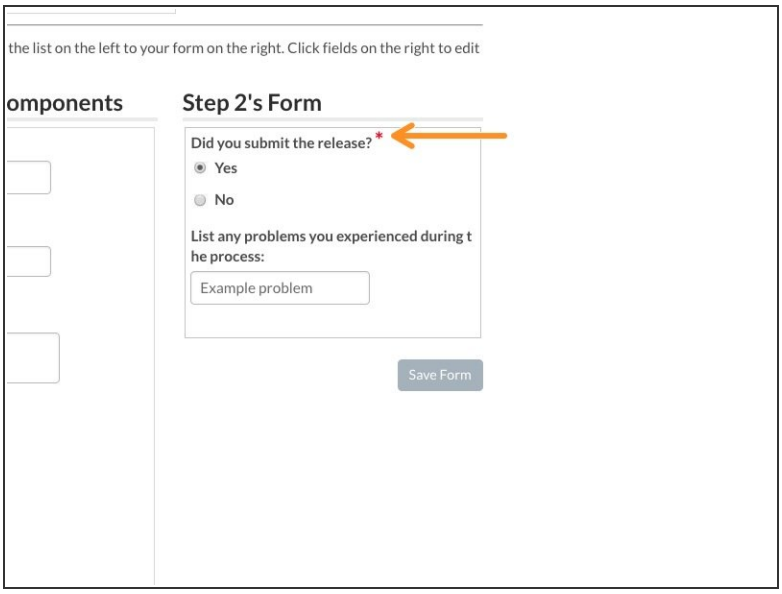
Step 6 — Customize Components



- Customize each component by clicking on it in the **Step Form** box.
- Enter the text for the prompt that you want to create.
- Enter a sample answer.
- Click on the **Save** button to save the component.

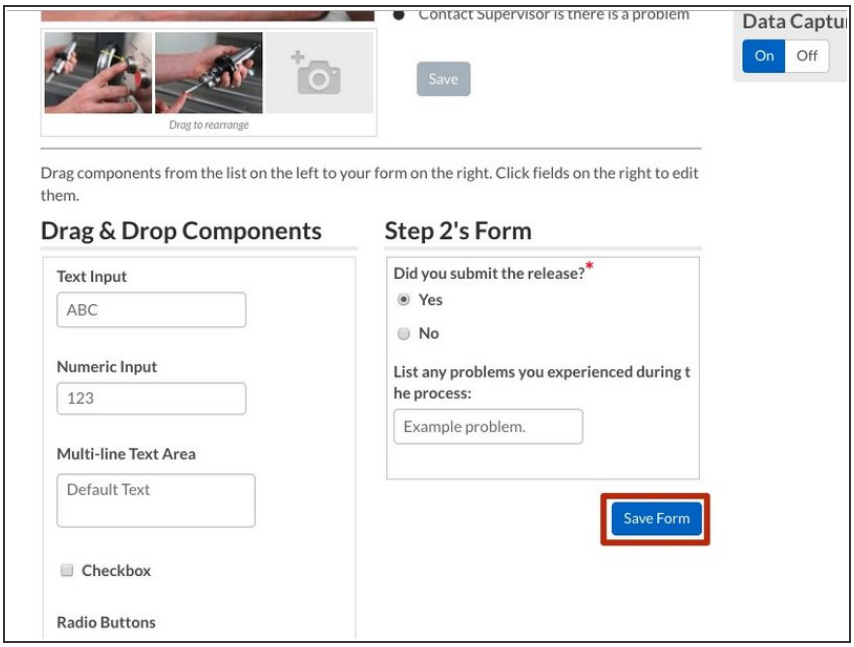
Step 7 — Required Components





- To set a component as required, check the box labeled **Required** on the component popup.
  - ⓘ A **Checkbox** cannot be set as a required component. **Radio Buttons** are always set as required components.
- Required components are identified with red asterisks.

Step 8 — Save Form



- Once you have created the desired fields for your form, click on the **Save Form** button to create the step form.
  - ⓘ *Data capture changes are included in revision history and are only shown in Operator View for Users once the Version is officially published.*

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