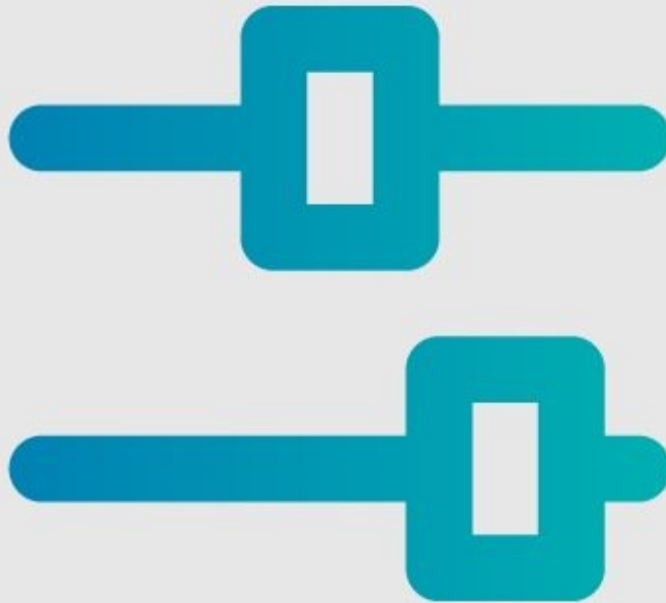




How to Add Data Capture Forms to a Guide

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

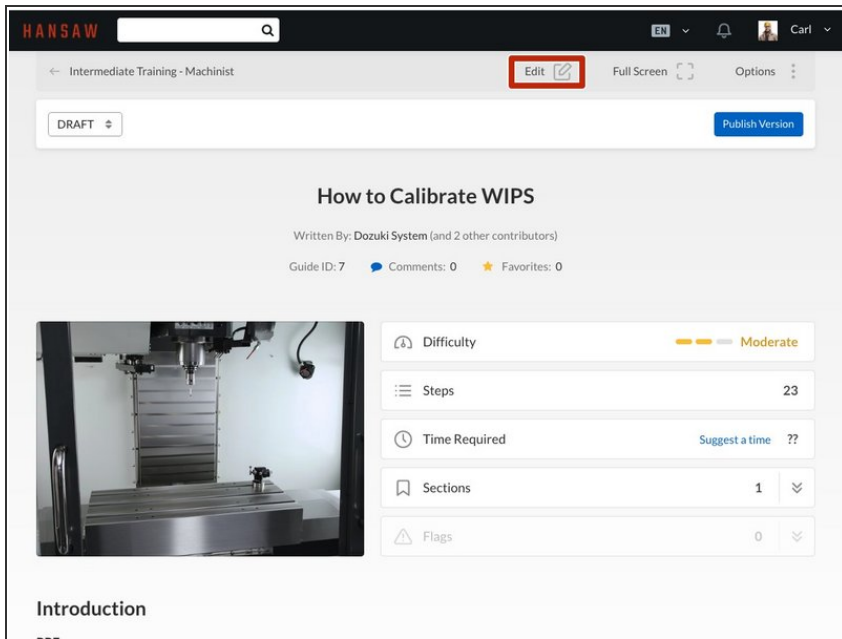
Written By: Dozuki System



INTRODUCTION

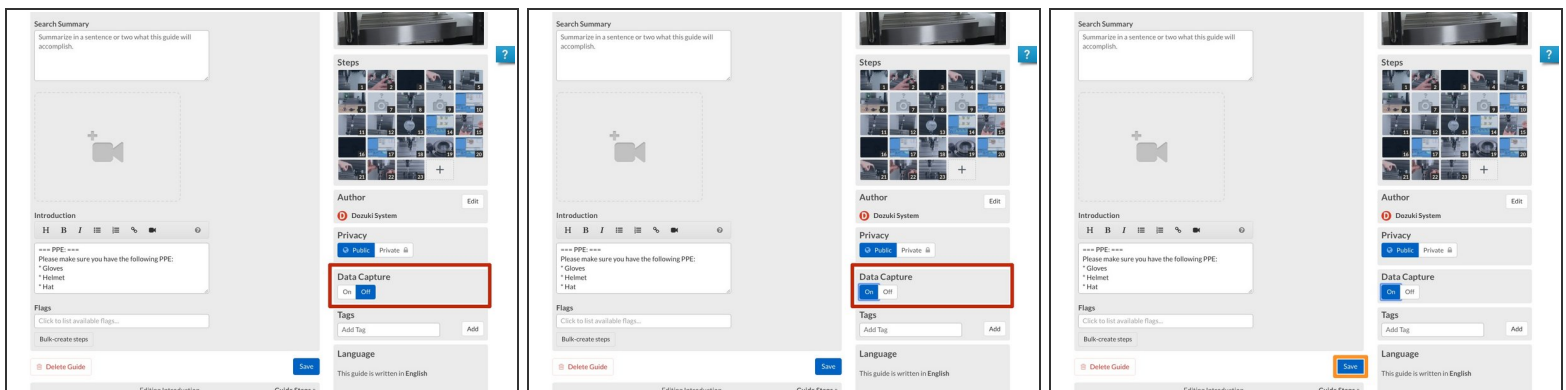
This guide demonstrates how to add customizable data capture forms to a guide page that are completed by the user in Operator View.

Step 1 — Open Guide Edit Page



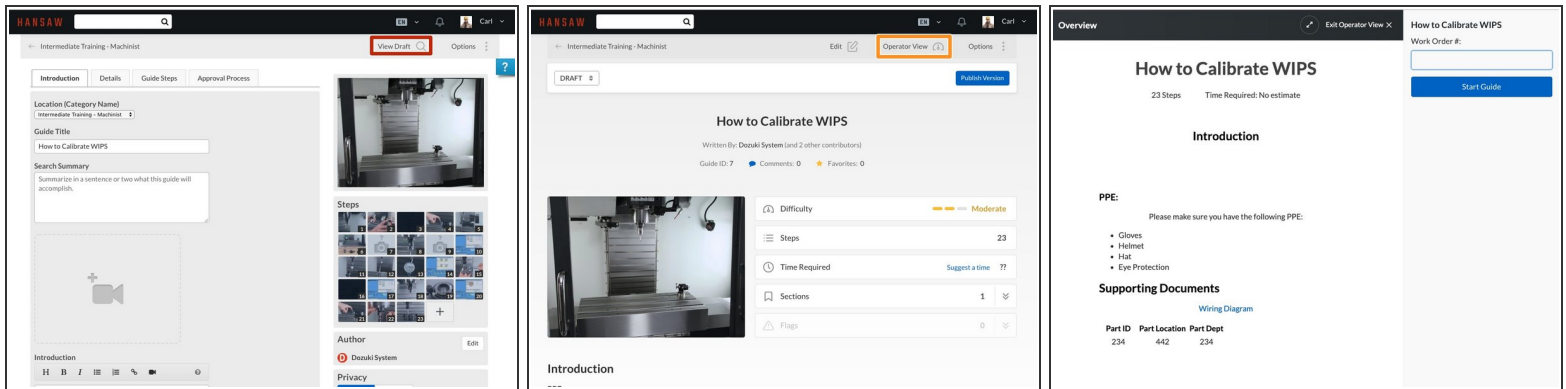
- Click on the **Edit** button at the top-right of the guide page, just beneath the site header.

Step 2 — Select Data Capture



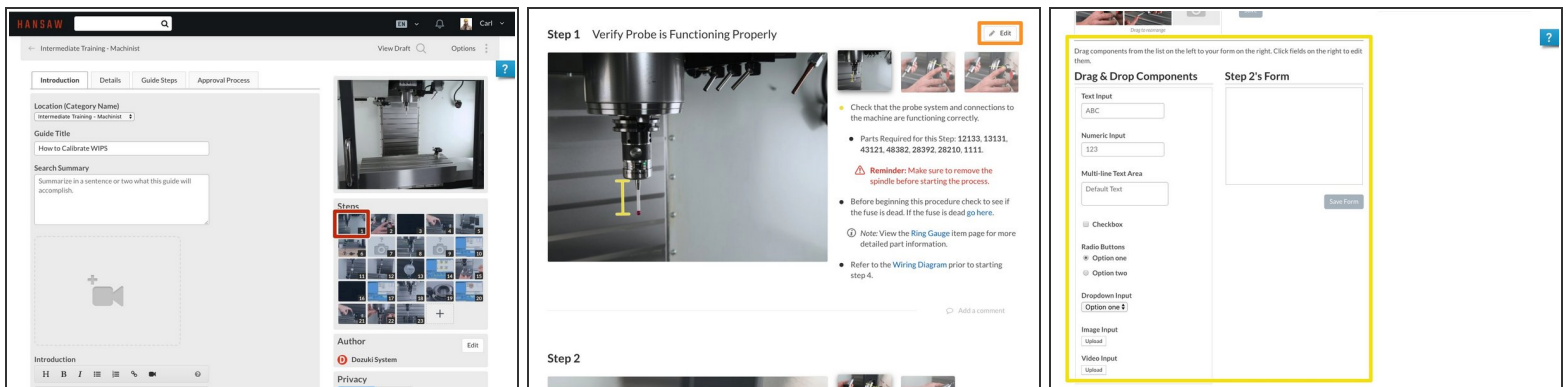
- Scroll down and toggle the Data Capture to **On**.
 - ☞ Operator View is an element of the Data Capture feature in Dozuki Guides, so it is not accessible until Data Capture is enabled.
- Click on the **Save** button.
 - ℹ Refreshing the page after saving will reveal the Data Capture fields underneath 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.

Step 5 — Drag & Drop Components

Drag components from the list on the left to your form on the right. Click fields on the right to edit them.

Text Input

0.07

Multi-line Text Area

Default Text

☐ Checkbox

Delete Step

Save Form

+ Insert Step

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- 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

st on the left to your form on the right. Click fields on the right to edit them.

On Off

Components

Step 1's Form

Text Input*

0.07

☐ Checkbox

Multi-line Text Area*

Default Text

Save Form

+ Insert Step

Next »

- 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

The first screenshot shows a 'Text Input' component popup with the 'Required' checkbox checked and highlighted by a red rectangle. The second screenshot shows the 'Did you submit the release?' radio button component with a red asterisk, indicated by an orange arrow.

- 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

The screenshot shows the 'Step 2's Form' with a 'Save Form' button highlighted by a red rectangle. The 'Data Capture' toggle is set to 'On'.

- 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.*

