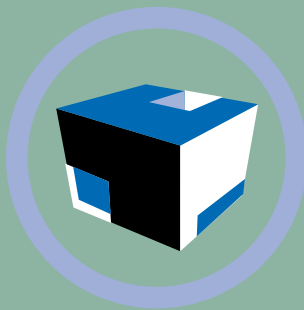


# LOGIFORMS.COM SOFTWARE

QUICKSTART GUIDE SERIES



## MANAGING FORM SUBMISSIONS AND DATA

What good are forms if the collected data is difficult to read, costly to manage, or impossible to transport? Logiforms gives you the ability to easily view, manage, and export your data all within our web-based system.

Use this QuickStart Guide to learn how to manage, sort, search print and export your data.

# MANAGING YOUR DATA QUICK START GUIDE

## GETTING STARTED

### Your Component Menu

Before you can access the data management tools and submissions for a form you need to first select the form you want to work with. **Click the “Edit Components” icon shown here to load your main menu.**

**A** Browse your project folders and click the form you want to activate.

**B** An overview of the selected form will load in the right side window shown here. The component details window contains key information about your form

The screenshot shows the 'Components' tree on the left with 'Feedback Form (form)' selected. The 'Component Details' window on the right shows the following information:

<b>Feedback Form</b>	
Edit Form   View Submissions   Delete   Duplicate   Move to New Folder   Import Data	
Date Created:	05/27/05
Last Modified:	05/27/05
Direct Link:	Open Form URL
Form Type:	Standard Form
Submissions:	
Password:	N/A
Encrypted Fields:	No Encrypted fields
SSL Encryption:	Not Enabled
Form Fields:	4



### NAVIGATION TIP

Once you activate a component, as shown above, the Toolbar Menu will become available. Roll over the **Data Management** tab in the Toolbar to reveal the Data Management Submenu and options for managing data and accessing the submission bin.

The toolbar shows the 'Data Management' tab selected, which has opened a submenu with the following options: Submission Bin, Export Data, Graphs, Filters/Views, Transfer Records, Data Triggers, and Sharing.

## SUBMISSION BROWSER

The submission browser contains all of the submissions received through your web forms and/or data you have imported. The submission bin gives you centralized access to all of your websites data and puts you in control.

**Selecting a grid mode:** At the bottom of the submission bin is the option to switch between two grid modes, the default grid mode is DHTML.

Each mode has different benefits and it will depend on your data as to which will suit your needs best.

Once you select a mode Logiforms will default to that mode the next time you log into your account.

**A** DHTML Grid mode

**B** Java Applet Grid mode

The screenshot shows a table of submissions with the following data:

ID	Avatar	Date	Time	Field 1	Field 2	Field 3	Field 4
21		01-30-2004	14:21:19	Yes	No		
22		01-31-2004	3:25:33	Yes	Yes		Yes
23		01-31-2004	3:26:4	Never Tried	No		
24		02-01-2004	13:58:50	Yes	No		
25		02-01-2004	16:17:8	Yes			
26		02-02-2004	14:58:30	No			

Below the table is a toolbar with the following buttons: Search, Transfer Selected, Delete Selected, Insert New, Import Data, and navigation arrows. At the bottom, it says: Select Grid Mode: DHTML Grid (most compatible) | Applet Grid (Fastest)

**A**

**B**

# MANAGING YOUR DATA QUICK START GUIDE

## Submission Browser

### Sorting Columns

Sort the columns in ascending or descending order by clicking the header column. If clicked again the column is sorted in the opposite direction. A sort order indicator displays the current sort order of a column.

Select All	ID	Date Submitted	Do you like Kraft Dinner
<input type="checkbox"/>	1	01-21-2004 23:30:28	Never Tried
<input type="checkbox"/>	2	01-21-2004 23:39:46	Yes
<input type="checkbox"/>	3	01-22-2004 15:12:35	Yes
<input type="checkbox"/>	4	01-22-2004 16:43:41	Yes
<input type="checkbox"/>	5	01-22-2004 19:47:13	No
<input type="checkbox"/>	6	01-23-2004 8:48:47	Never Tried
<input type="checkbox"/>	7	01-23-2004 9:40:48	Never Tried
<input type="checkbox"/>	8	01-23-2004 16:42:27	Yes

## SUBMISSION BROWSER - DHTML Grid

### DHTML Grid

The DHML grid is the most compatible grid and will work on most browsers. It is best used when you have a small or medium number of columns and dataset.

**A**

#### Cut and Paste to Excel

The DHTML Grid allows you to easily move data into excel by simply CLICK and dragging the cells you require then using CTL + C to cut and CTL + V to paste.

**B**

#### Expand Large Data Values

The DHTML Grid automatically displays large data values in a popup when you move your mouse over a cell. This is useful when you are searching for specific data or reviewing data within your submission bin.

Select All	ID	Date Submitted	Do you like Kraft Dinner
<input type="checkbox"/>	1	01-21-2004 23:30:28	Never Tried
<input type="checkbox"/>	2	01-21-2004 23:39:46	Yes
<input type="checkbox"/>	3	01-22-2004 15:12:35	Yes
<input type="checkbox"/>	4	01-22-2004 16:43:41	Yes
<input type="checkbox"/>	5	01-22-2004 19:47:13	No
<input type="checkbox"/>	6	01-23-2004 8:48:47	Never Tried
<input type="checkbox"/>	7	01-23-2004 9:40:48	Never Tried
<input type="checkbox"/>	8	01-23-2004 16:42:27	Yes
<input type="checkbox"/>	9	01-23-2004 16:42:46	No

3 Putting together the Provide  
 4 The whole site is very u. I would lik a Nothing My onlin  
 5 The autoreponders an I need to do maint. The several steps to Online f  
 6 Creating an online form. I would like the best. The timeout period i. Ability to  
 7 Using calcul The autoreponders and notifications are the best. My  
 8 Using the to can do forms from the point of a client request to  
 9 completing the forms.  
 10 The forms and auto-res Not sure yet. Still ne Nothing yet. A stand  
 11 How the information co nothing at the mom nothing at the mom registra  
 12 Conditional branching is On pull-down lists, t Sometimes during fc Logiforr

## SUBMISSION BROWSER - Applet Grid

### Applet Grid

The Applet grid is best used when you have a large number of columns and a large dataset. The grid is faster and will allow you to use the integrated filtering fields to examine your data.

**A**

#### Real Time Filtering of your Data

Search and filter the data in the table using the powerful filter bar. You can filter on exact matches or sub strings as well as operators such as <,>,<=,>=, and <>. **Right click in the filter row (the bottom row) to activate a column for searching.**

	62	Mar 9, 2004 08:43 AM	Never Tried			
	70	Mar 19, 2004 01:59 AM	Never Tried			
	73	Mar 21, 2004 11:02 AM	Never Tried			
	89	Mar 26, 2004 01:20 AM	Never Tried	No		
	91	Mar 26, 2004 03:49 AM	Never Tried			
	93	Mar 26, 2004 06:09 AM	Never Tried	Yes		
	94	Mar 26, 2004 06:14 AM	Never Tried			
	100	Mar 26, 2004 08:31 AM	Never Tried			
			Never T			

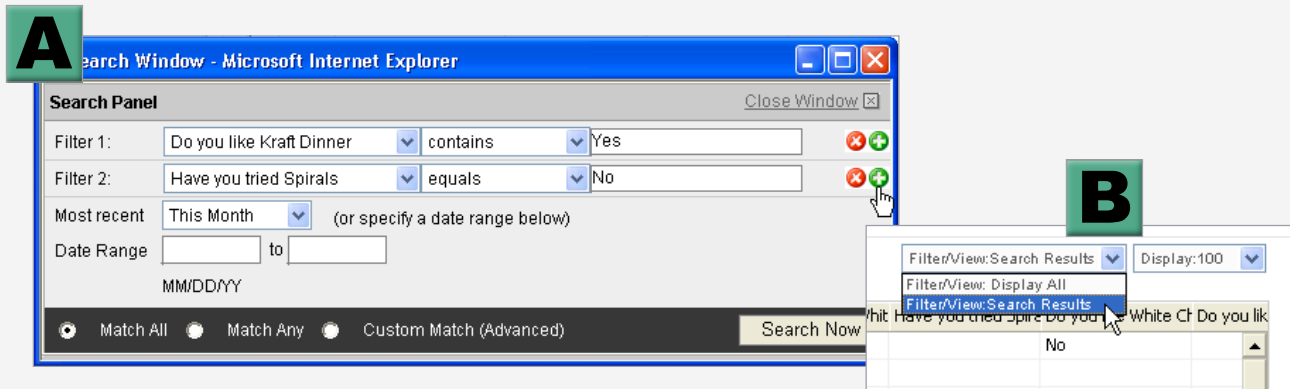
# MANAGING YOUR DATA QUICK START GUIDE

## SEARCHING & FINDING RECORDS IN THE SUBMISSION BIN


**A** Use the powerful search window to build complex queries and quickly find information. To open the search window use the Search button at the bottom of the submission bin.

Using the search window, you can create multi statement queries. The screenshot below shows two filter clauses used to locate specific records. Build up to 10 filters and then join them using the "Match Any", "Match All" or by creating a custom search clause

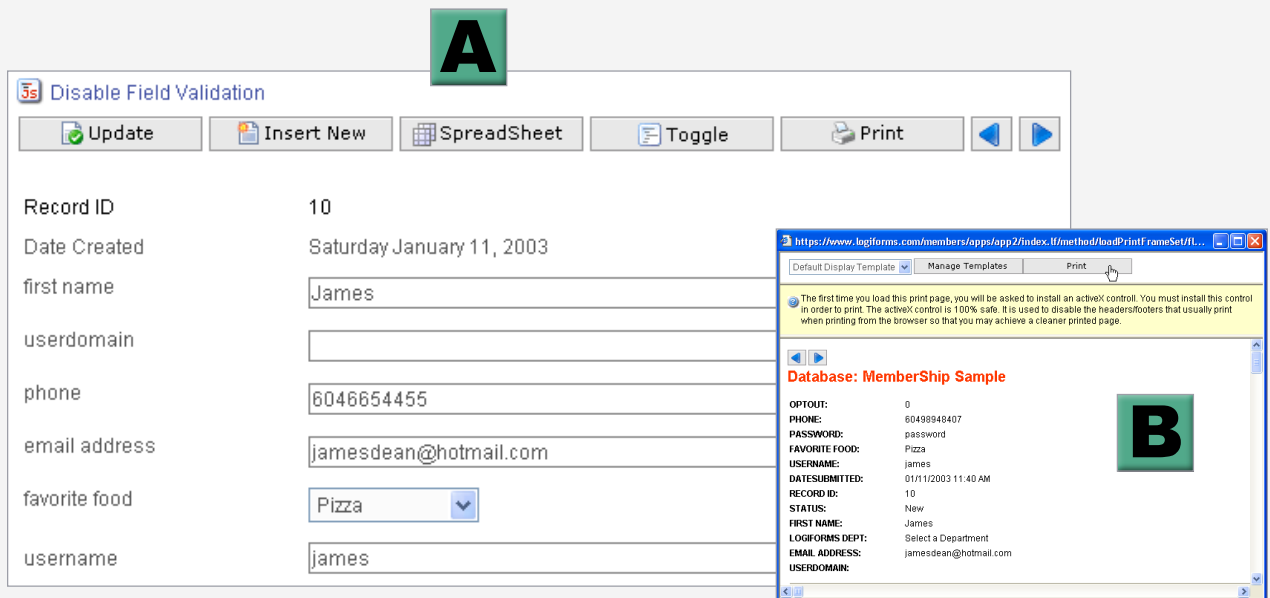
**B** Click the search button to execute the search. The search results will load in the submission bin and the options "Search Results" will be added to the views/filters drop down menu. As shown below, you can toggle between the search results and any other filters or views.



## EDITING & PRINTING INDIVIDUAL RECORDS

**A** Click the record icon  to open the record details view. In this view, displayed below, you can edit any of the records information

**B** Use the print button to print individual records.



# MANAGING YOUR DATA QUICK START GUIDE

## USING FILTERS EFFECTIVELY

**A** Filters are a key part of managing your data. A filter is a set of rules which dictate what records to display and what fields to displayed. Using our support form as an example, we have a couple of different filters. We have a filter that we set up that shows only support requests which are flagged as “New”. Another filter allows us to quickly display any support requests which currently have a status of “open”

**A**

Select All	ID	Date Submitted	First Name	userdomain	Favorite Food
<input type="checkbox"/>	24	01-21-2004 23:16:9			
<input type="checkbox"/>	25	01-21-2004 23:34:41	test		
<input type="checkbox"/>	26	01-22-2004 8:24:25	dfafdsa		Pizza
<input type="checkbox"/>	27	01-22-2004 19:36:31	Clyde		Pizza
<input type="checkbox"/>	28	01-27-2004 21:14:11	Caedmon		Pizza
<input type="checkbox"/>	29	02-02-2004 9:28:13	paul	paul@yahoo.com	SeaFoc
<input type="checkbox"/>	30	02-04-2004 7:14:31	Timothy	Eckels	Pizza
<input type="checkbox"/>	31	02-04-2004 13:57:29	Testing	4052626363	SeaFoc
<input type="checkbox"/>	32	02-05-2004 11:51:45	p	rock	Pizza

**A** Click the “Filters / Views” link from the Submission Bin Submenu to create a filter. Select the fields that you wish to exclude from the filters results. This is useful when you want to simplify your view of the data and can also be used in conjunction with a sub user account to restrict access to certain data when it is shared through the external access module.

**B** A filter consists of between 1 to 10 filter clauses. Displayed below are 2 filter clauses. Each filter clause allows you to select the field, an operator (is, greater than, less than ect.) and enter the criteria to match. As a convenience, if the field is a multi-select field on your form, all of the options for that field are automatically available to be selected.

**C** At the bottom of the filter clauses is the matching option. Here you can choose to “Match All” to force the filter to match all of the individual rules defined here, or “Match Any” to simply match any of the rules. The final option is for advanced users. This final option is extremely powerful and allows you to create sophisticated filters. A more indepth explanation of this feature is available in our user manual.

**Data Filter Management**

Use the following options to create a custom view of your data. You can exclude columns from the view, define the sort order of the fields and create a filter to display only selected records. Views can be used as restrictions when sharing data.

Save Filter

Select the fields to Exclude below (optional)

... None .....  
DateSubmitted  
**First\_Name**  
userdomain  
Phone

**A**

Filter 1 Logiforms Dept equals Technical Support  
**B**

Filter 2 DateSubmitted equals

Match All  Match Any  Custom Match (Advanced)  
**C**

**?** One of the most powerful use of filters is when they are used in conjunction with hidden fields. If we use our support form for example, we have a hidden field on our support form called “Status”. Status is a standard drop down menu with an option for “New”, “Open”, and “Resolved”. It has been flagged as hidden on our form, so you don’t see it when you fill it out. By default the value is “New”, so all new support form submissions have a status of “New”. When we respond to the support request we update this value to “Resolved” or set it to “Open”.

Now using the filters and this hidden field we can easily flag data and group it together.

# MANAGING YOUR DATA QUICK START GUIDE

## EXPORTING DATA

**A** Export your data at any time to excel, or a text file format using the export feature. When exporting data, you can choose to export all of your records or use a filter to select only specific records to export. Filters can then be saved as “Export Profiles” and used again for future exports.

**B** Next, you select the download format and select only the fields you want to export

The screenshot shows the 'Export Data' section of a software interface. It includes a navigation menu with 'Submission Bin', 'Export Data', 'Graphs', 'Filters/Views', 'Transfer Records', and 'Data'. A text box explains that users can query data and define records for download, with an example of filtering by country=USA. Below this are three download options: 'Download all Data', 'Download selected only', and 'Use a previous saved selection'. A filter is applied: 'Logiforms Dept contains Technical Support'. A 'Select download format' dialog is open, showing 'Excel Formatted Workbook' selected, with a list of fields: 'First Name', 'Logiforms Dept', and 'optout'. A 'Continue' button is at the bottom of the dialog.

## GRAPHS & CHARTS

**A** The graphs icon in the Submission Bin Sub menu provides graphs for any questions on your forms that are multiple choice. Click this icon to access the graph section. Within the graph section, you will be able to select a question from your form and generate a graph, as shown here.

**B** If you have any filters defined, you'll be able to also select a filter and generate graphs while limiting the amount of data. This is useful when you are interested in viewing statistics within a sub set of your data.

