



Pages User Guide

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Preface

Revision History

Revision	Description	Date
1.0	Initial release of document for Release 2021.2.0	June 2022
2.0	Updated version of the document for Release 2022.1.0 FP1	September 2022
3.0	Updated release of document for release 2022.1.0 FP2 Beta	November 2022

About this Guide

Welcome to the complete guide to getting started with Pages. This guide describes AppViewX's Page builder tool and gives you step by step instructions on creating custom pages, incorporating various page elements like HTML pages, reports, workflow catalogs, forms, tables etc to suit user-specific requirements.

Audience

This guide is intended for network/IT Operations, engineers, DevOps and Security Operations using AppViewX for the first time with an understanding of the networks. It aims to introduce basic concepts related to building self-service Pages for Line of Business, employees and partners.

This guide is intended for the following audience:

- PKI
- Application Teams
- Network Operations (NetOps)
- Security Operations (SecOps)
- Network Engineers

Text Conventions

The following text conventions are used in this document:

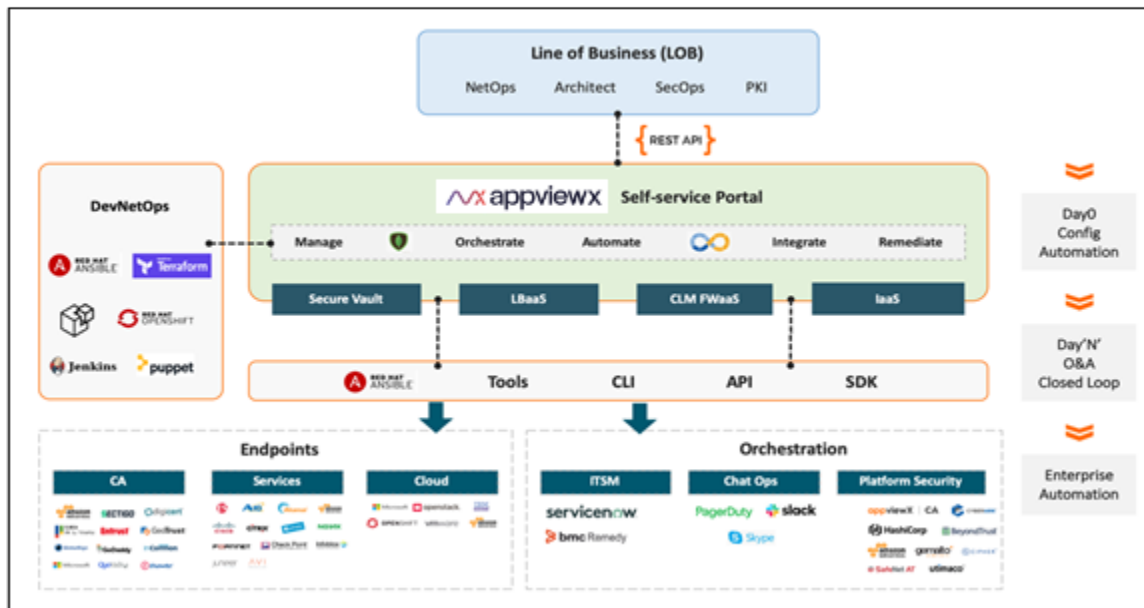
Convention	Description
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in the text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>codeblock</code>	Indicates commands with a paragraph, URLs, codes in examples, text that appears on the screen, or text that you enter.

Chapter 1: Module Overview

AppViewX's self service Pages module allows you to design and customize your own page using Page Builder and access different modules within AppViewX from that page. You can design custom pages and add elements like HTML pages, quick links, search widgets etc. to suit specific requirements. Easy and quick access to multiple modules on one page saves time.

AppViewX's self service Pages offers:

- Intuitive self-service Pages to access service offerings for Line of Business (LOB), employees, and partners via customized pages
- Self-service pages by persona for NetOps, PKI, Application Teams, SecOps
- Low code page builder that allows customization of pages with personalized task views
- Provision to design custom web pages using HTML
- Configurable page elements and customised branding to provide a seamless intuitive experience for end users.
- Provision to share pages for collaboration between team members
- Reusability of page components among multiple users



The screenshot displays the AppViewX Self Service Catalog interface. At the top, the AppViewX logo and 'Self Service Catalog' title are visible. Below the header, there are navigation tabs for 'Certificates' and 'ADC'. The main content area is divided into several sections:

- Enroll Certificate:** A card with a magnifying glass icon and a right-pointing arrow. Text: "Enroll for a valid CA Certificate, fill in the required details to obtain X.509 Certificates".
- Renew Certificate:** A card with a circular refresh icon and a right-pointing arrow. Text: "To renew SSL certificates for your primary account: Select Global settings, and then select Manage SSL certificates".
- Revoke Certificate:** A card with a circular trash icon and a right-pointing arrow. Text: "Revoke a Certificate before expiration or immediately when its private key shows signs of being compromised".
- Certificates by category:** A card featuring a pie chart titled "Total: 16". The legend shows: Others [3], Server [5], Device [2], and Client [5].
- Certificate List:** A card with a person icon and a right-pointing arrow. Text: "Certificate Management, or more specifically, x.509 certificate management, is the activity of monitoring, facilitating, and executing every certificate process necessary for uninterrupted network operations".
- Alert:** A card with a bell icon. It displays four statistics:

All requests	1	Open requests	0
Closed requests	0	Failed requests	1

Chapter 2: Prerequisites

Web Browser Requirement

Browsers	Version
Internet Explorer	v11.0.9600.18817 or later
Firefox	V74.0.1 (64-bit) or later
Google Chrome	V85.0.4183.83 (64-bit) or later

Chapter 3: Getting Started with Pages

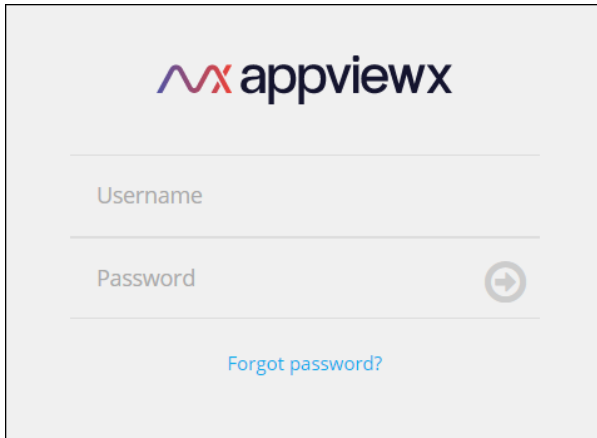
AppViewX's self-service catalog allows you to:


- Use existing pages for immediate use
- Modify existing pages according to user-specific needs
- Design and customize pages by persona
- Assign permission for users to view, modify and share pages
- Publish self service catalogs

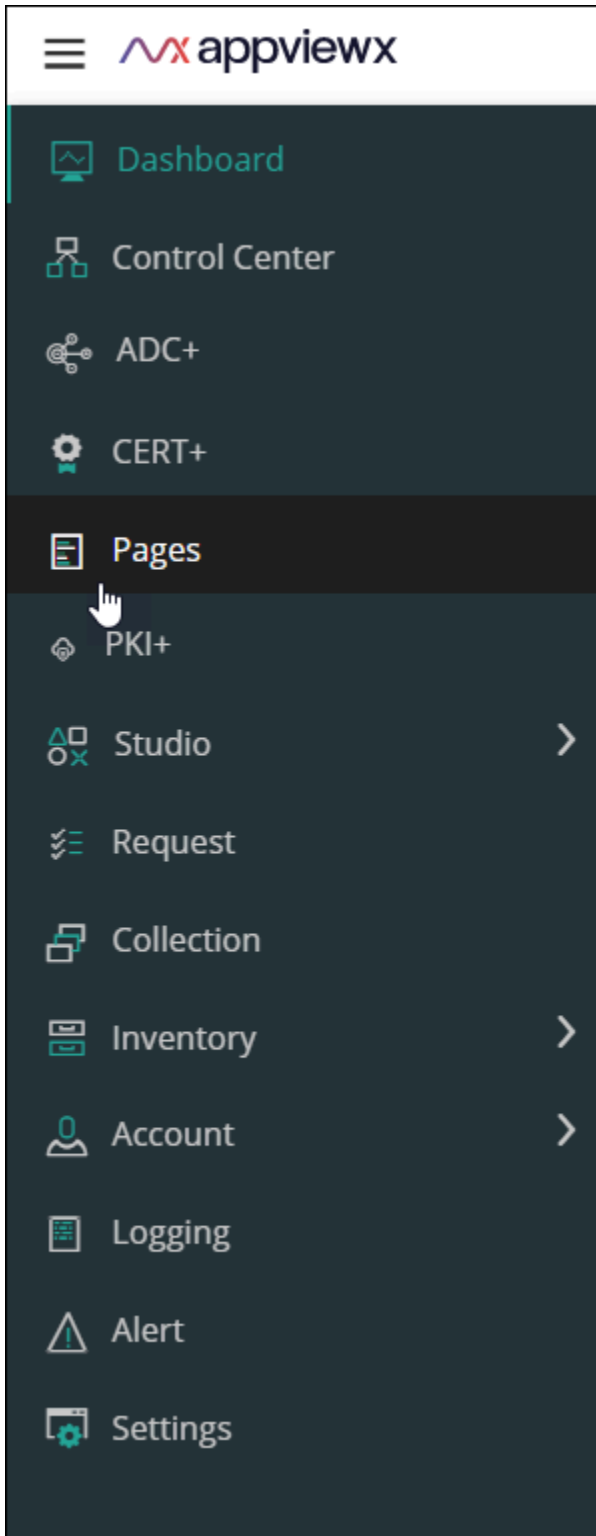
Chapter 4: Accessing the Page Builder

To access the page builder:

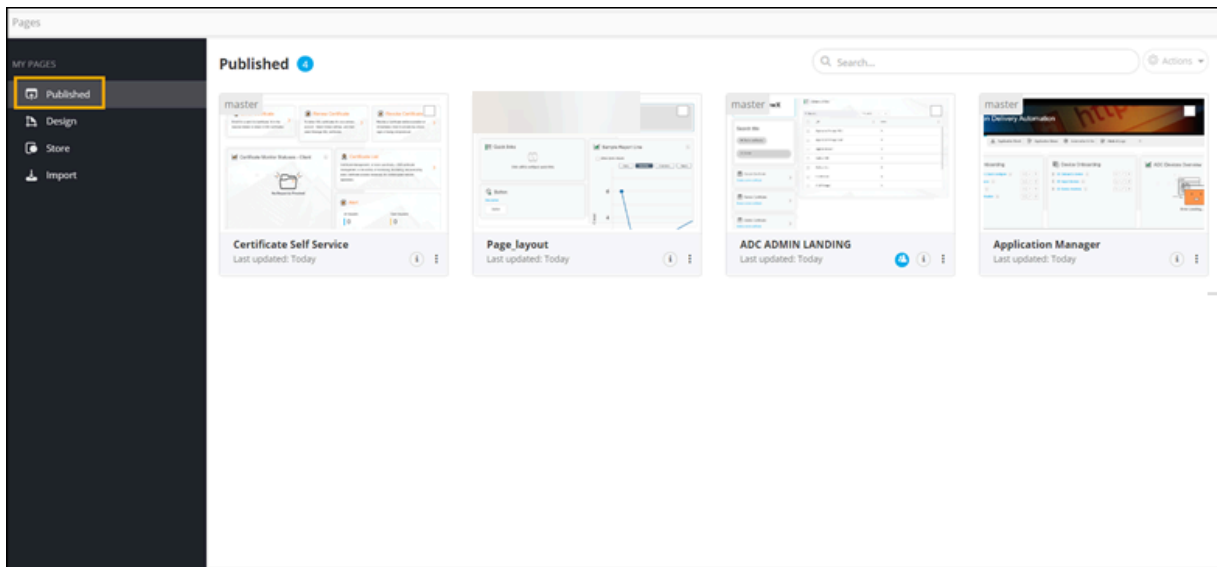
1. Log into AppViewX with valid credentials.

A screenshot of the AppViewX login interface. At the top center is the AppViewX logo, which consists of a stylized 'VX' in red and blue followed by the text 'appviewx'. Below the logo are two input fields: the first is labeled 'Username' and the second is labeled 'Password'. The password field has a circular icon with a right-pointing arrow on its right side. Below the password field is a blue link that says 'Forgot password?'.

2. To access the navigation pane, hover your mouse over the  icon.
3. From the menu displayed, select **Pages**.



The **Pages** Inventory is displayed, with the **Published** tab open by default.



Chapter 5: Pages Inventory

- Overview
- Published
- Design
- Store
- Import

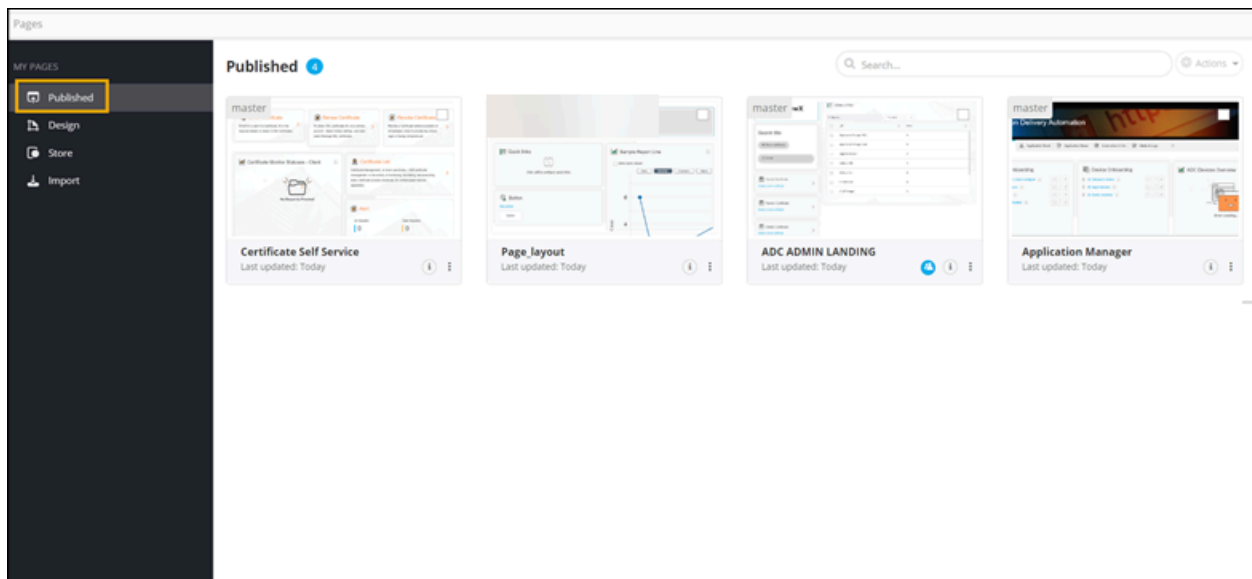
Overview

The **Pages** inventory displays the **Published** section by default. The menu on the left gives access to the following sections:





- **Published**
- **Design**
- **Store**
- **Import**


Published

This section shows all the **Published** pages in a card view.



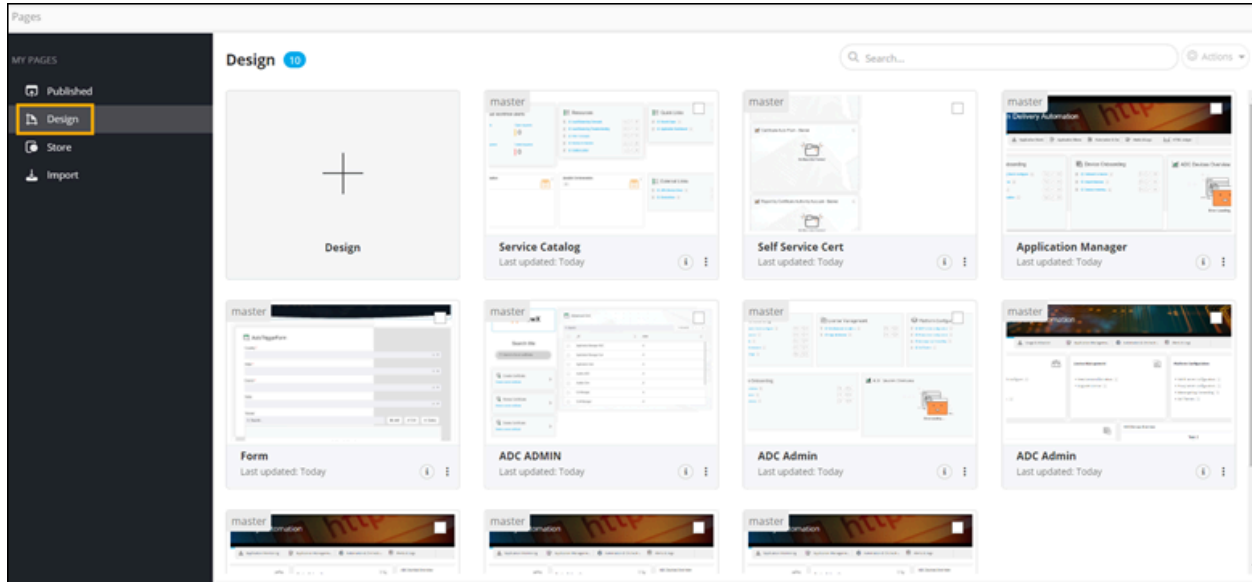
The following table describes the various options present in this section:

Options	Description
	A highlighted icon represents a shared page. Hovering over the icon displays the name of the person who created the page.
	Shows 'Last Updated' info and description of the page.
	Allows users to perform the following actions on the selected page: <ul style="list-style-type: none"> • Clone: Allows users to clone the selected page. • Export: Allows users to export the selected page.
Actions	Allows users to export the selected page(s). <div data-bbox="321 905 1419 993" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This option is enabled only when you select a page. </div>
Search bar	Allows users to search for a specific page within the Published pages Inventory by using keyword(s).




 **Important:** Published pages cannot be deleted.

Design

This section shows all pages created by a user that are in design mode and have not been published yet.

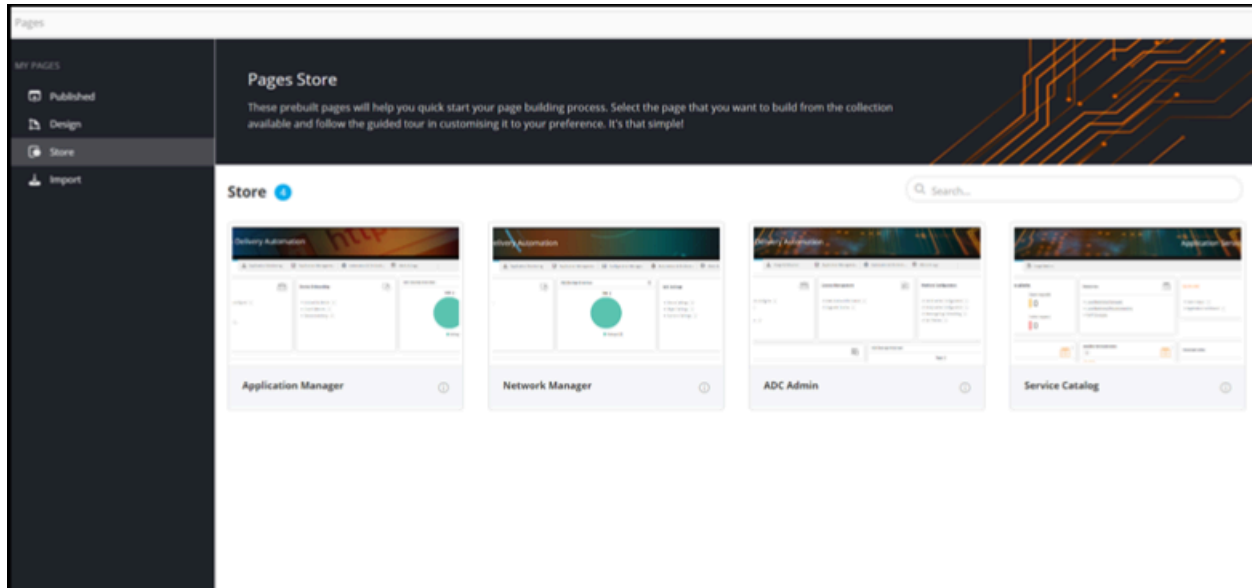


The following table describes the various options present in this section:

Options	Description
	Displays 'Last Updated' info and description of the page.
	Allows users to perform the following actions on the selected page: <ul style="list-style-type: none"> • Clone • Delete • Export
Search bar	Allows users to search for a specific page within the Design Inventory by using keyword(s).
Actions	Allows users to perform the following actions on selected page(s): <ul style="list-style-type: none"> • Delete • Export <div style="border: 1px solid #add8e6; border-radius: 15px; padding: 10px; margin-top: 10px;">  Note: This option is enabled only when you select a page(s). </div>

Store

Store has a collection of prebuilt out of the box (OOB) catalogs that can be used as a reference for building your customized pages. Select the OOB Catalog you want to build based on the persona and customize it as per your preference.



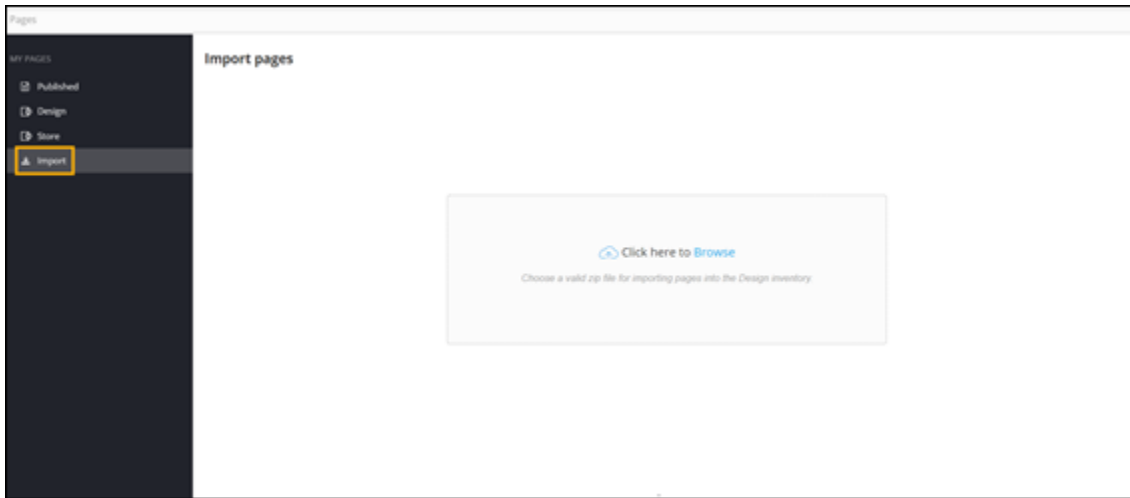
Note: For more information on Getting Started with OOB Catalog, click [here](#).

Import

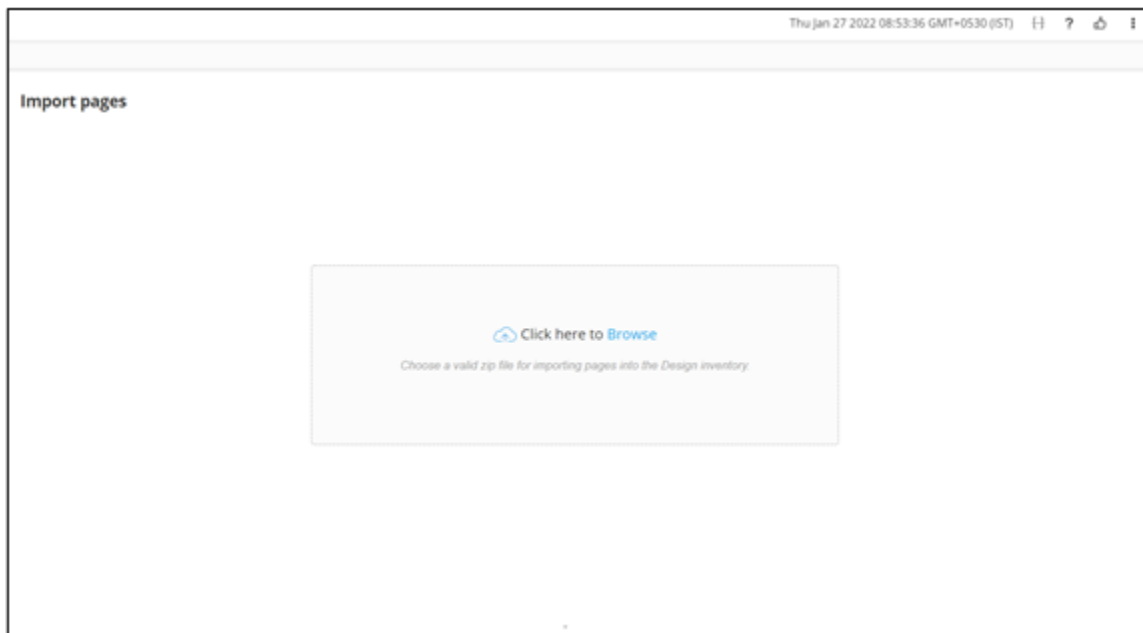
You can import a page into the AppViewX Page builder module. Importing pages allows you to reuse exported pages from one environment into another.

To import a page:

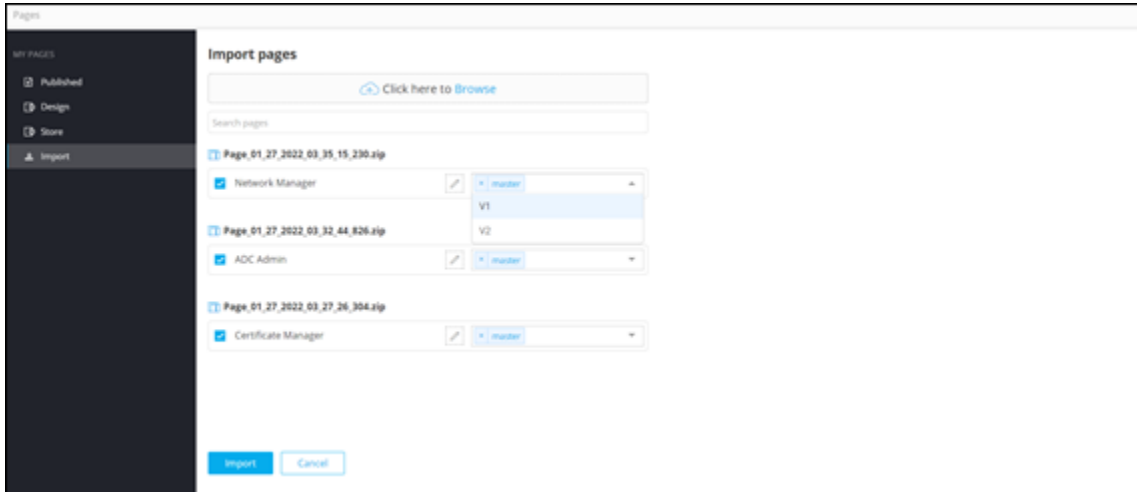
1. On the **Pages** Inventory page, from the navigation pane on the left, click **Import**.




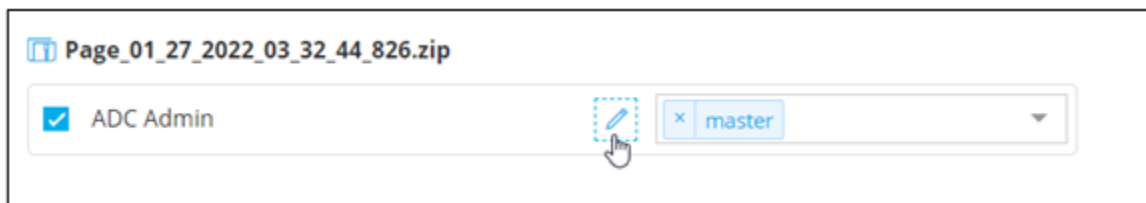
2. To select a file to upload from your machine, click **Browse**.



3. Select the Page(s) to be uploaded.
4. Once the files are uploaded, select the page version for each page.



5. To change the Page name before importing it into the Design Inventory, click  next to the Page name and type in the new name.



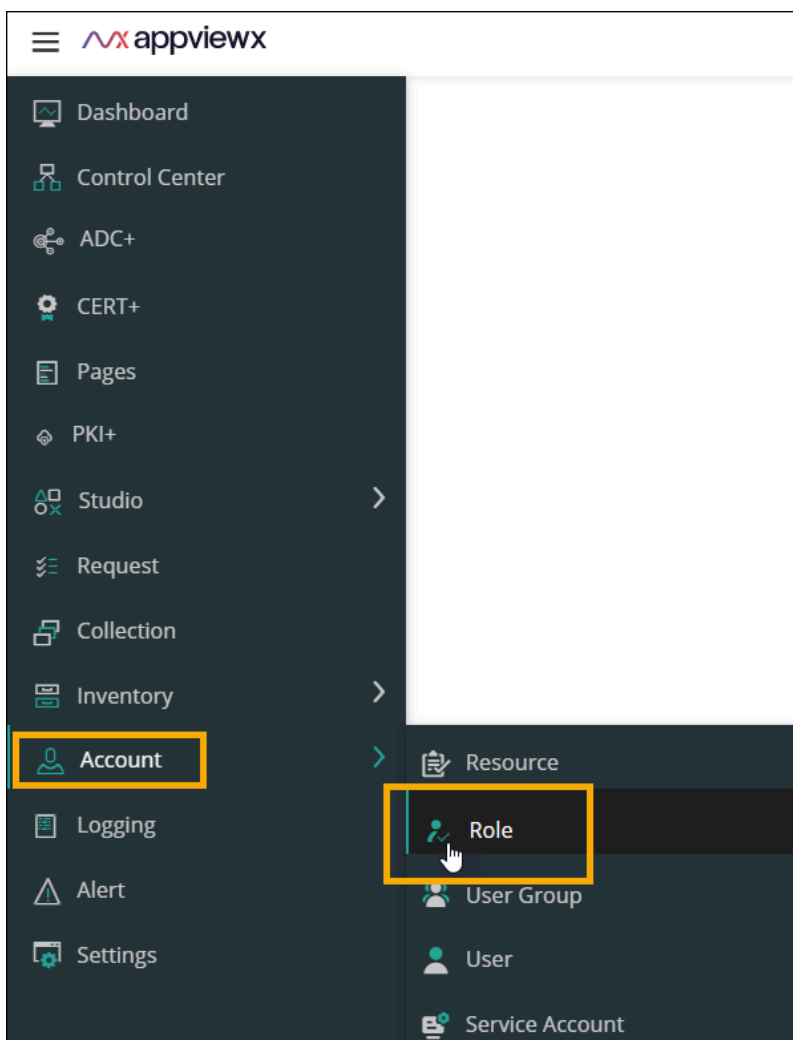
6. Once you have selected the page versions, click **Import**.
The imported page is added to the [Design](#) Inventory.

Chapter 6: Role Based Access Control

Role based access control (RBAC) implies restricting authorized users to access certain aspects of the system. With RBAC, users can be granted access to only certain aspects of a system or platform and prevent them from accessing other information or systems. Users must have the necessary permissions assigned to them to use this application.

To get an overview of the actions authorized for a particular user:

1. To access the navigation pane, hover the mouse over the ☰ icon.
2. From the menu displayed, select **Account > Role**.



3. To see the access provided to a user, click on a username, for example, admin.

Name	Description	Status
<input type="checkbox"/> Application Manager-ADC	Responsible for managing technical aspects of one or more major LOB applications.	Enabled
<input type="checkbox"/> Application Manager Cert	Responsible to manage the application specific certificates and devices, setup alerts ...	Enabled
<input type="checkbox"/> Application User	Responsible to monitor the application specific certificates, setup alerts for expiry an...	Enabled
<input type="checkbox"/> Auditor-ADC	Responsible for monitoring, analysing logs and reporting out on actions	Enabled
<input type="checkbox"/> Auditor Cert	Responsible for monitoring, analysing logs and reporting out on actions	Enabled
<input type="checkbox"/> CA Manager	Responsible to manage CA related request and operations in AppViewX	Enabled
<input type="checkbox"/> CA Manager Read Only	Responsible to view CA related request and operations in AppViewX	Enabled
<input type="checkbox"/> CLM Manager	Responsible to manage AppViewX CLM Platform functions	Enabled
<input type="checkbox"/> DevOps Manager	Responsible for managing a DevOp team; they may write applications, and respons...	Enabled
<input type="checkbox"/> DevOps-ADC	Responsible for DevOps strategies, automation strategies and code sign	Enabled
<input type="checkbox"/> DevOps-Automation	Responsible for DevOps strategies, automation strategies, code sign	Enabled
<input type="checkbox"/> Executive Director-ADC	AppViewX provides organisations with holistic, business-level visibility across cloud a...	Enabled
<input type="checkbox"/> Executive Director-Automation	AppViewX provides organisations with holistic, business-level visibility across cloud a...	Enabled
<input type="checkbox"/> Executive Director Cert	AppViewX provides organisations with holistic, business-level visibility across cloud a...	Enabled
<input type="checkbox"/> Executive Director Security	AppViewX provides organisations with holistic, business-level visibility across cloud a...	Enabled
<input type="checkbox"/> Network Manager	Responsible for managing and monitoring network infrastructure	Enabled
<input type="checkbox"/> Portal User	Responsible for Self-servicing and accessing automation flows via Catalogue	Enabled
<input type="checkbox"/> Security Manager	This role grants users complete access to all objects on the system	Enabled
<input type="checkbox"/> Traffic Manager	Responsible to perform traffic management operations and Monitors specific app h...	Enabled
<input type="checkbox"/> USERS/Read-Only Admins	This role grants users complete access to all objects on the system.Cannot CreateR...	Enabled
<input type="checkbox"/> admin	admin	Enabled

4. To see a list of actions defined for admin, click **Authorized functions**.

Role > Modify :: admin

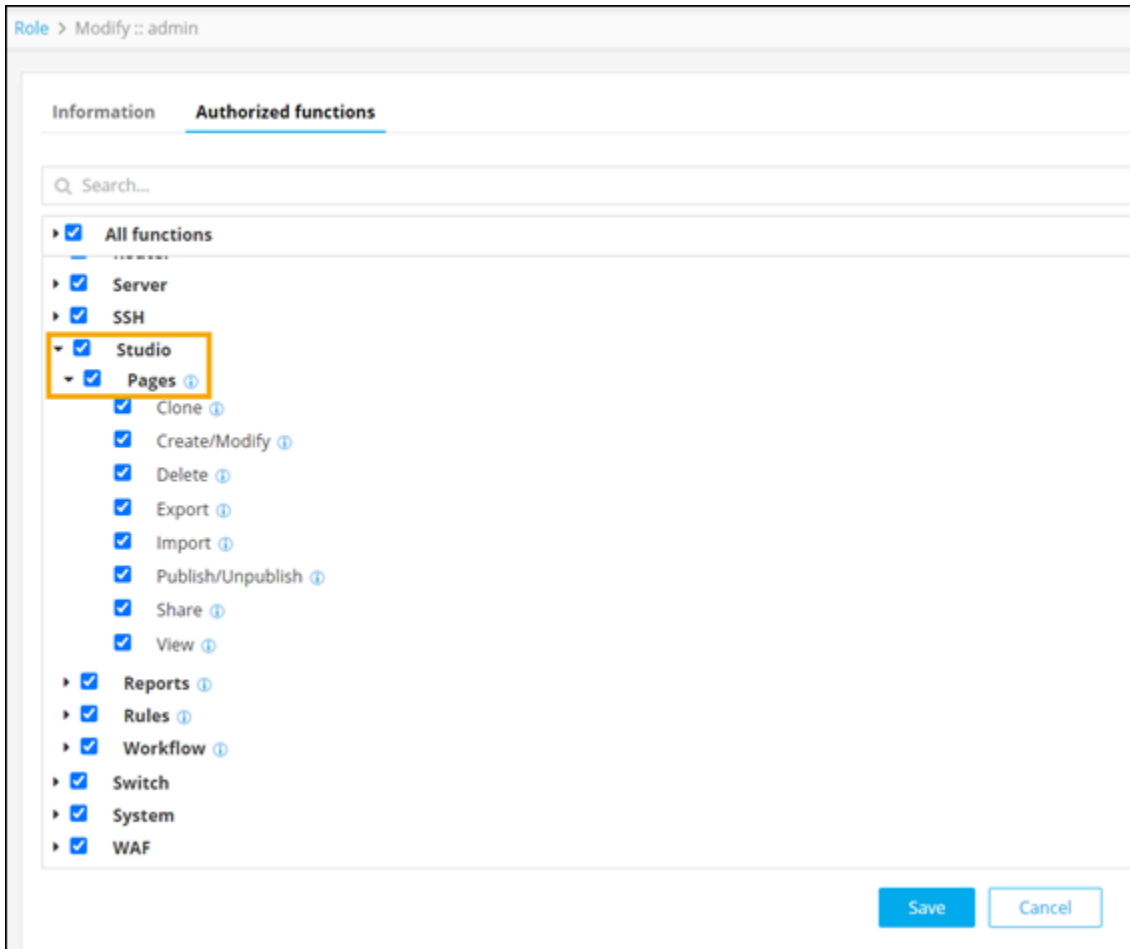
Information **Authorized functions**

Search...

- All functions
- ADC
- Appvision
- CERT
- Cloud
- DNS
- Firewall
- General
- MDM
- Proxy
- Request
- Router
- Server
- SSH
- Studio
- Switch
- System
- WAF

Save Cancel

5. To see a list of actions that are authorized for admin, under **Studio** click **Pages**.



Note: A selected checkbox indicates that the actions are authorized for the selected user.

The following table describes the various actions that can be authorized or restricted for a user in the Pages module:

Action	Description
Clone	Provision to allow or restrict a user to clone an existing page.
Create/Modify	Provision to allow or restrict a user to create or modify an existing page.
Delete	Provision to allow or restrict a user to delete an existing unpublished page.
Export	Provision to allow or restrict a user to export an existing page.
Import	Provision to allow or restrict a user to import an existing page.
Publish/Unpublish	Provision to allow or restrict a user to publish or unpublish a page.

Action	Description
Share	Provision to allow or restrict a user to share a page.
View	Provision to allow or restrict a user to view the pages.

Chapter 7: Getting Started with OOB Pages

- [Overview](#)
- [Accessing OOB Pages](#)
- [Take a Tour](#)

Overview

Before you begin designing your self-service catalogs using Page Builder, here's a brief overview of getting started with pre-built pages. These prebuilt pages give you an insight into the various actions that each persona (such as a Network Manager, ADC admin and so on) would be able to perform using their customized page.

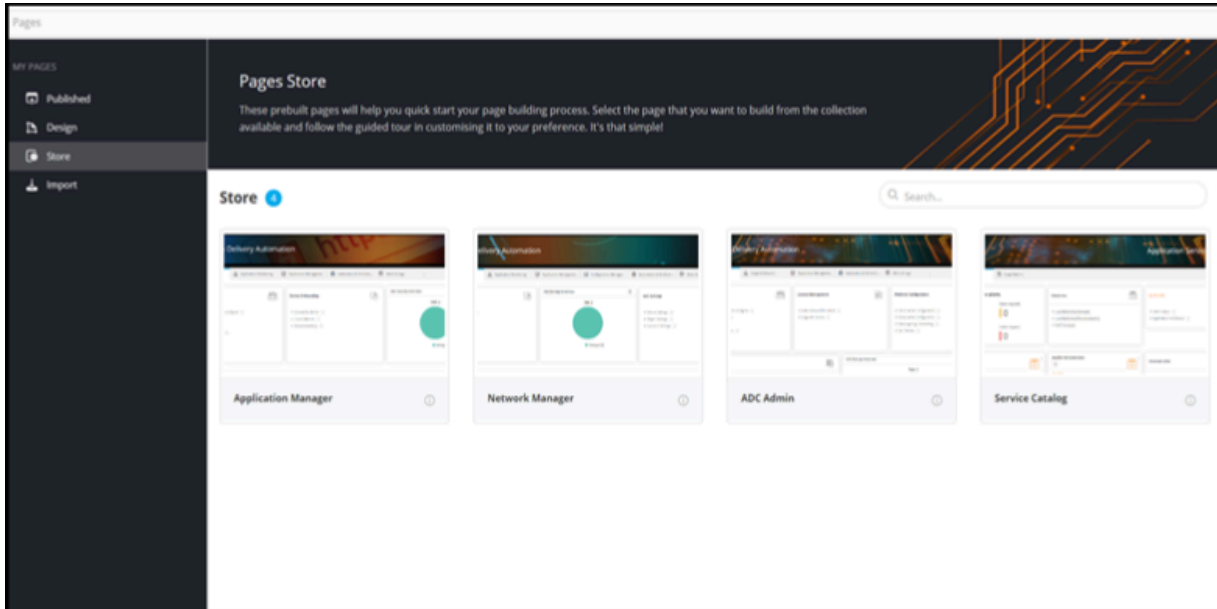
These prebuilt pages enable you to perform the following key actions:

- Gain insights and visibility into application delivery services.
- Monitor and troubleshoot application services.
- Configuration management and upgrades.
- Self service and automation of application delivery services.

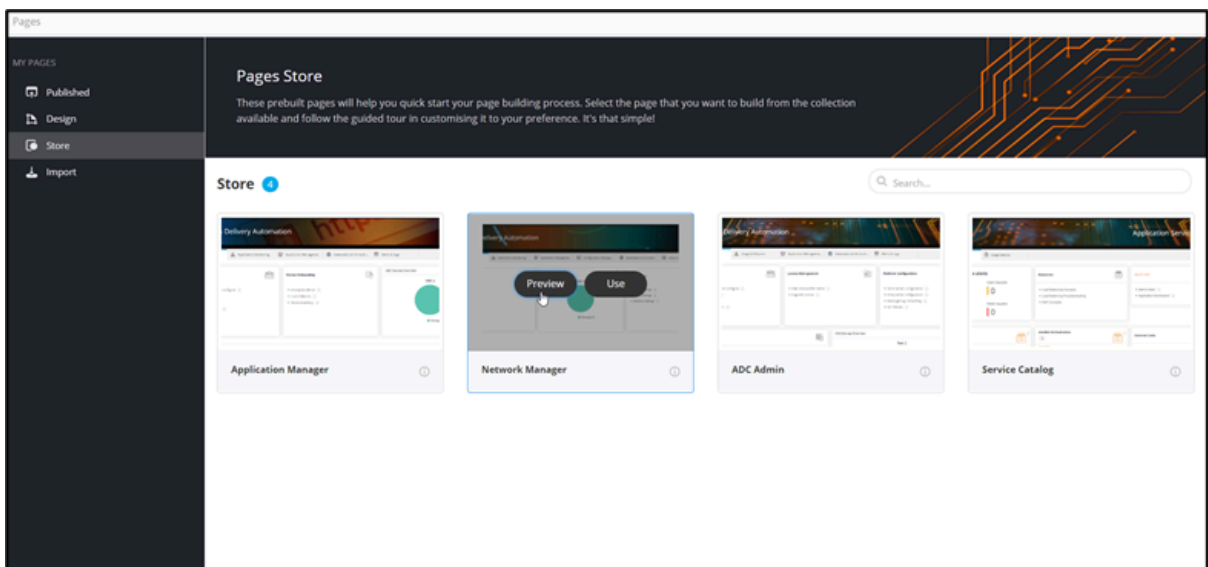
Based on the persona, be it a CA manager, ADC admin or an Application Manager, you can customize this page and add/delete components to meet your requirements.

Accessing OOB Pages

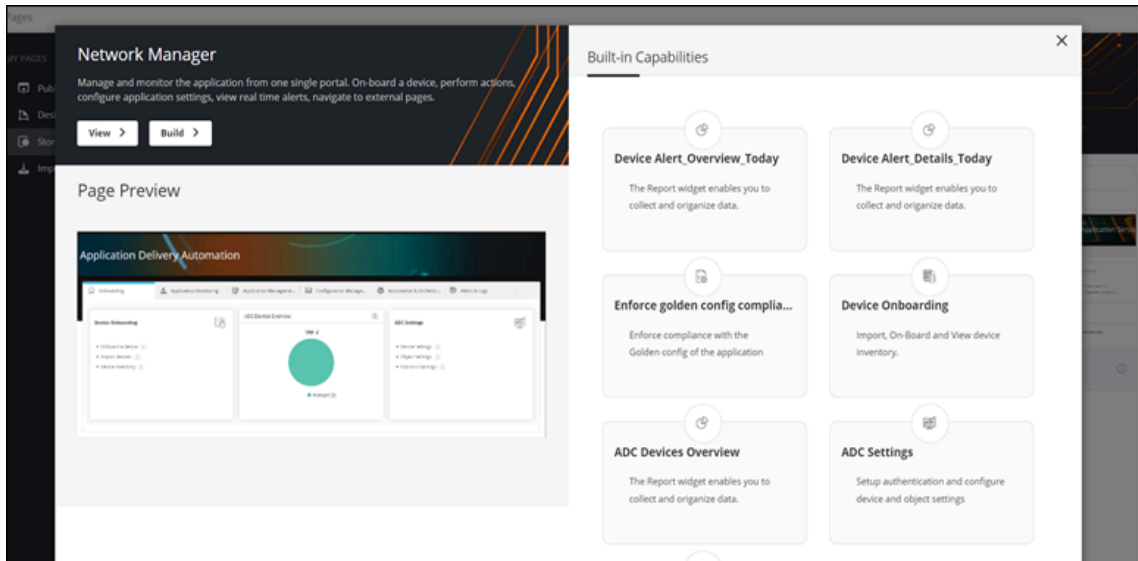
1. On the **Pages** Inventory page, from the navigation pane click **Store**.
The OOB Pages inventory is displayed.



2. To preview a prebuilt OOB page, hover your mouse over a page and click **Preview**. For example, **Network Manager**.

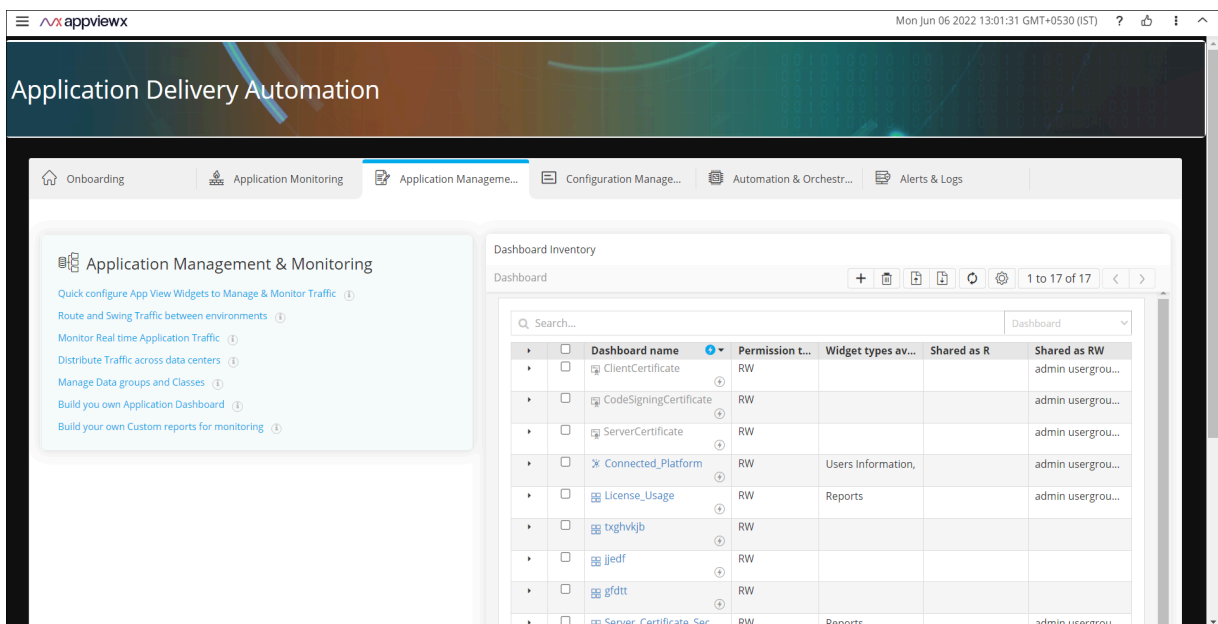


A preview of the Network Manager's page is displayed in a popup window.



3. To see a preview of this page, click **View**.

The page opens in a new tab.



4. To use an OOB page and modify it, on the pop-up page, click **Build**.

A copy of this page is added to the **Design** inventory and the page opens in the same tab.

5. To customize an OOB page, on the **Store** page, hover your mouse over a page and click **Use**.

A copy of the selected page is created in the **Design** inventory and the page opens in the same tab.


You now have the option to:

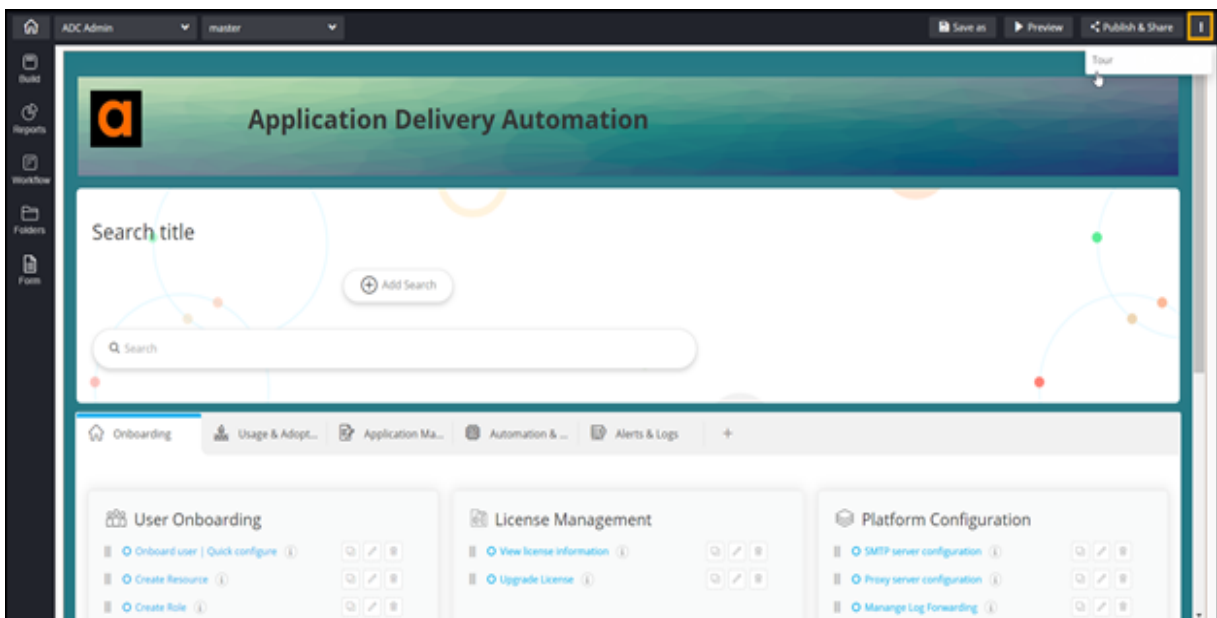
- **Publish** and use this OOB page.
- **Modify** this page to suit persona-specific needs.
- **Design** a new custom page from scratch.

Take a Tour

Take a quick tour of the Pages module and familiarize yourself with its various functionalities. Users will be prompted to take a tour when they access Page Builder and build a custom page for the first time. There is also a provision to explore the tool from any page in design mode.

To take a tour:

1. Open a page from the [Design](#) section.
2. From the top right corner of the screen, click .
3. To explore the Pages module, click **Tour**.



Chapter 8: Designing a page

Self-service Pages module allows you to build a page in two ways:

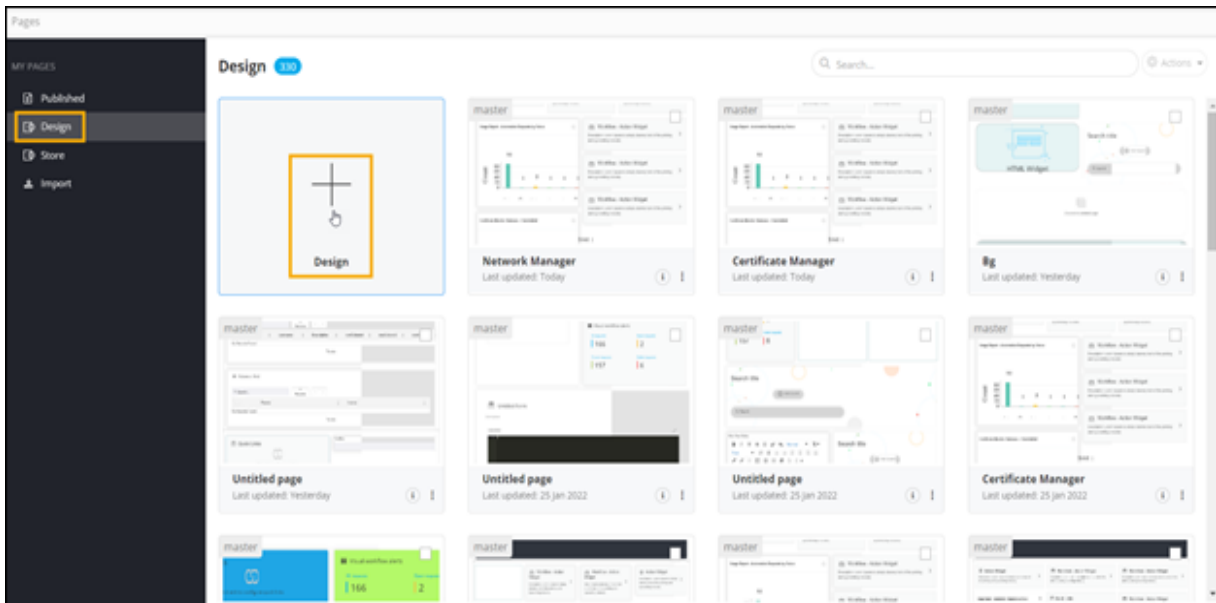
- **Designing a custom page:** Design a page from scratch by adding pre-built components.
- **Customizing prebuilt pages:** Select predefined sample pages and customize according to user-specific needs.

Chapter 9: Designing a Custom Page

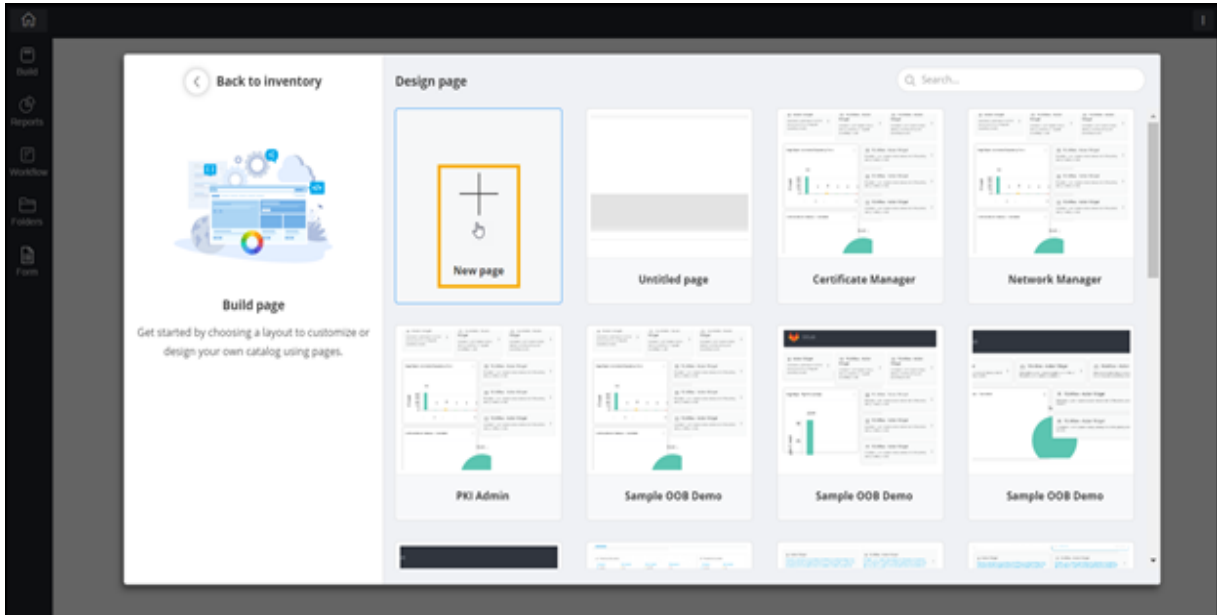
- Getting Started with Designing a Custom Page
- Page Layout
- Build
- Reports
- Workflow
- Folders
- Inventory
- How to Undo/Redo actions
- Moving widgets
- Cloning Widgets

Getting Started with Designing a Custom Page

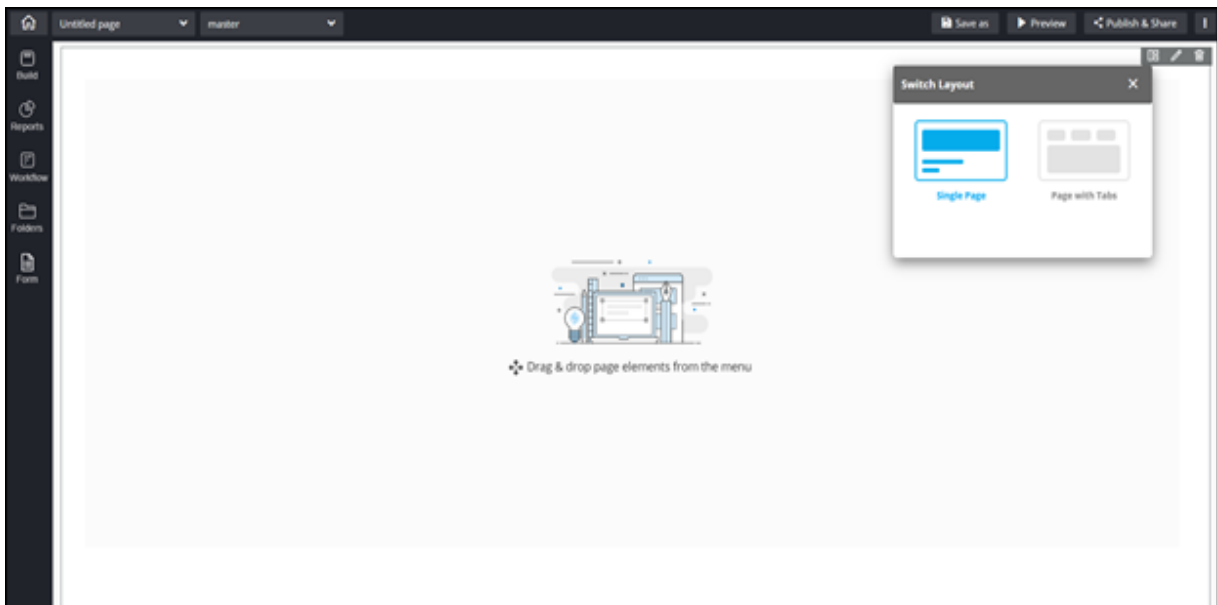
1. On the **Pages** Inventory page, from the navigation pane on the left, click **Design**.
2. To create a new page, on the **Design** Inventory page, click **Design**.



3. To build a custom page from scratch, click **New Page**.



A blank page is displayed with the **Switch Layout** window open by default.

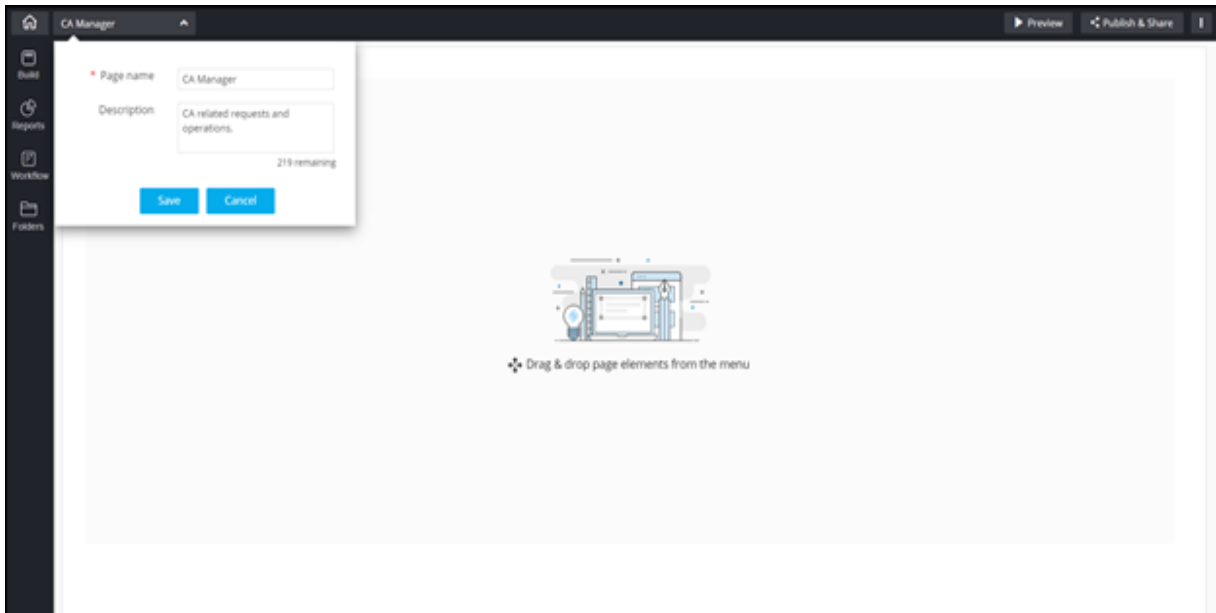


Note: For more information on page layouts, click [here](#).

The component panel on the left shows the following options for Page elements:

- **Build:** Allows you to add widgets and form components to your page.
- **Reports:** Allows you to add report widgets to your page.
- **Workflow:** Allows you to add workflow catalogs to your page.
- **Folders:** Allows you to save pages to personal and shared folders.
- **Inventory:** Allows you to access OOB forms and customized forms.

4. To add a **Page name** and **Description**, click on the **Untitled page** dropdown.



5. Add **Page name** and **Description** .

6. Click **Save**.


Page Layout

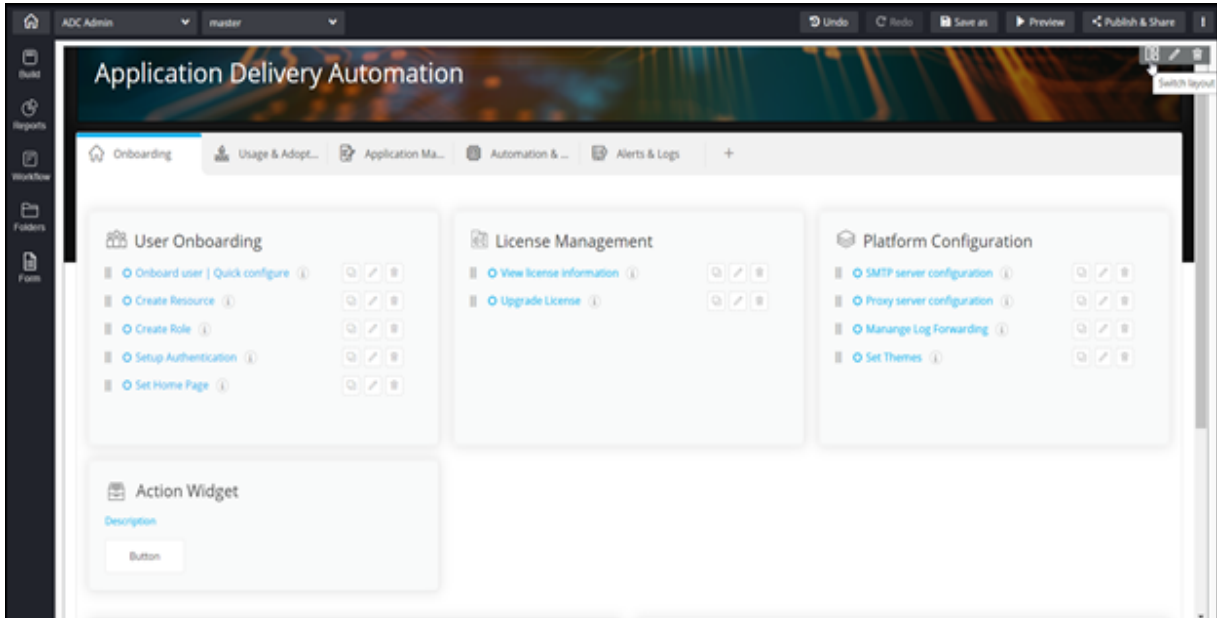
Self-service Pages module allows you to choose from two layouts for your customized page:

- **Single page:** This is the default page layout.
- **Page with tabs:** Users can create pages with up to 6 tabs.
- [Switching from Page with tabs Layout to Single Page Layout](#)
- [Switching from Single Page Layout to Page with tabs Layout](#)
- [Tab reordering](#)
- [Modifying page layout](#)
- [Deleting a Page](#)

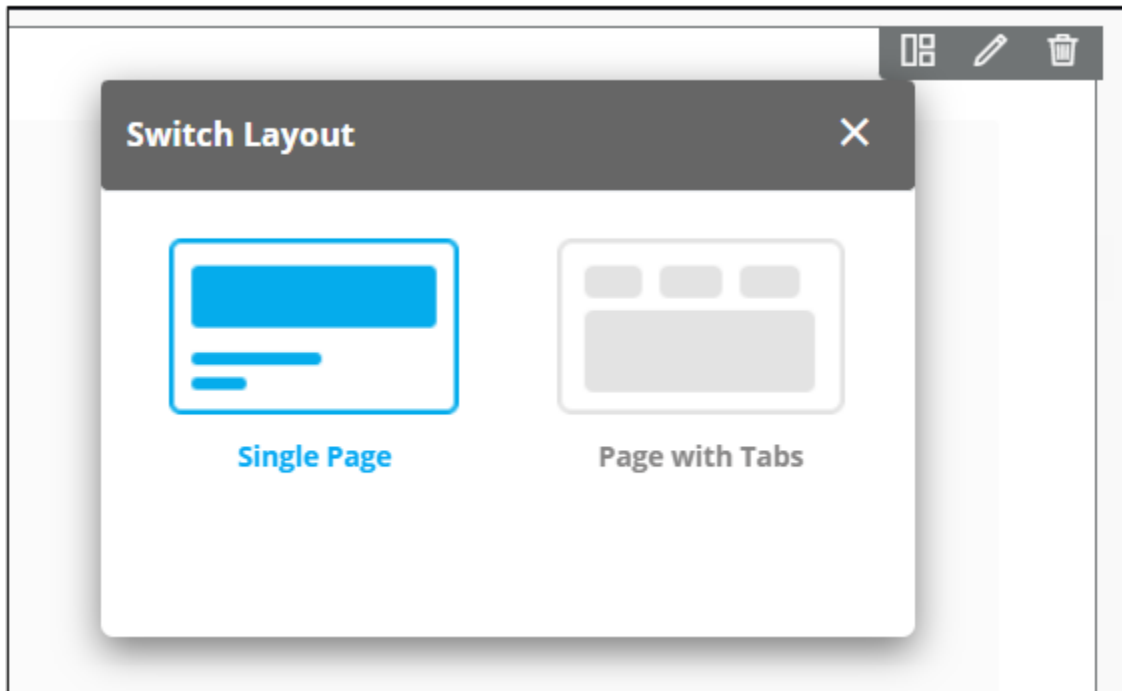
Switching from Page with tabs Layout to Single Page Layout

You can create a customized page with multiple tabs. There is a provision of adding up to 6 tabs on a page. The tabs can be arranged either horizontally or vertically.

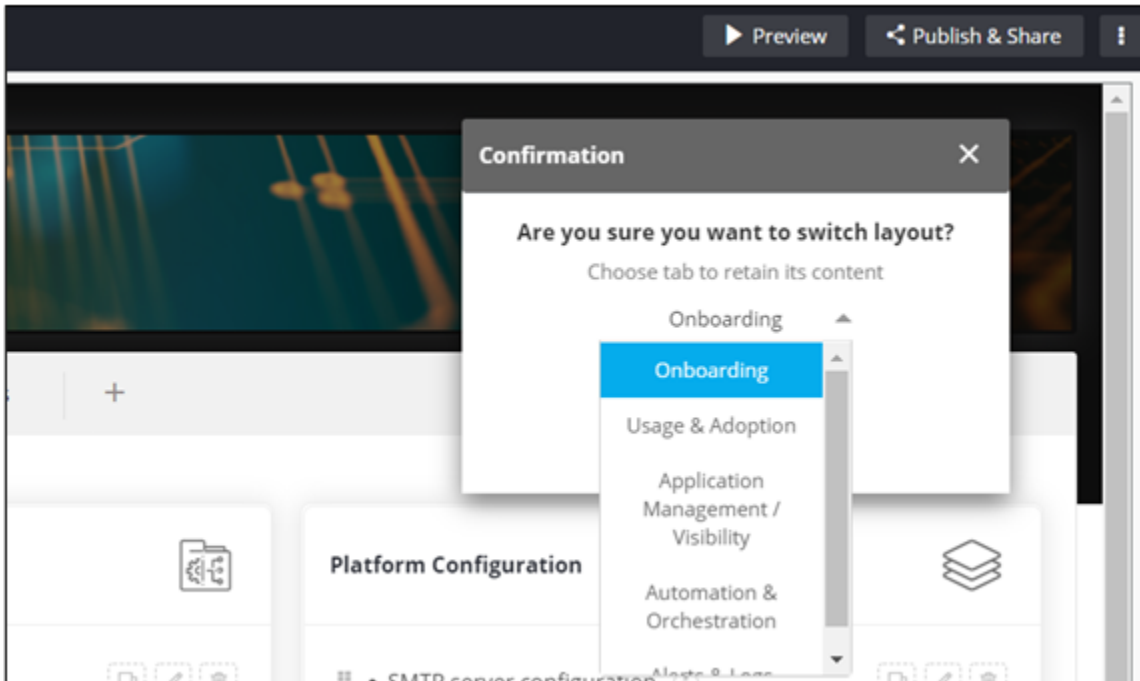
1. In the build area, from the top right corner of the screen, click .



2. In the **Switch Layout** window, click **Single Page**.



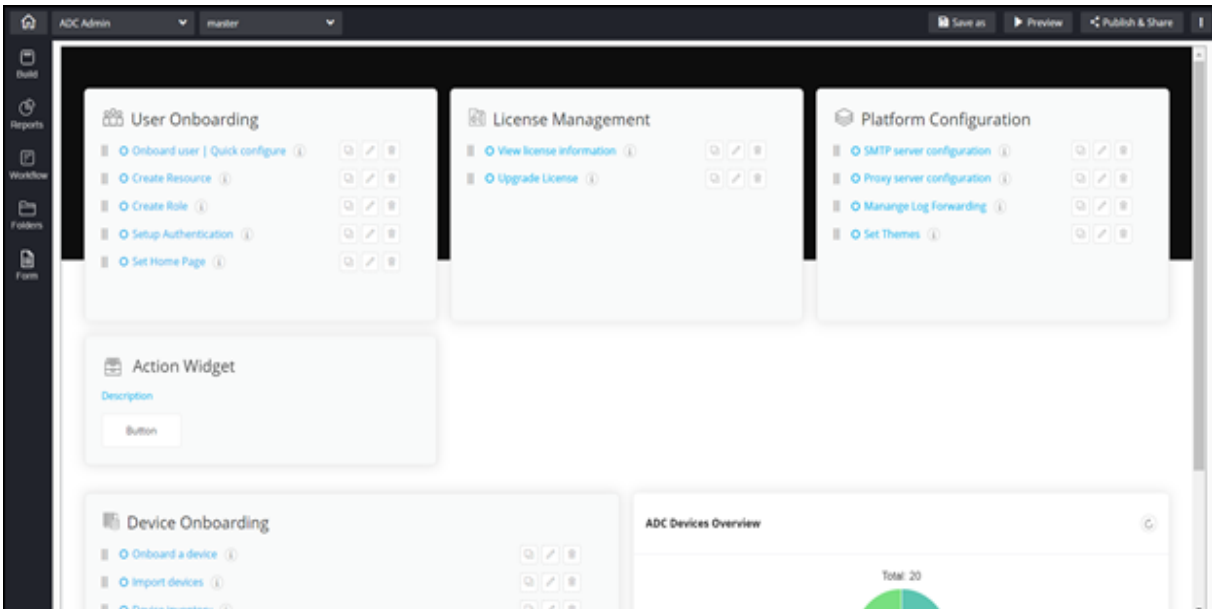
3. In the **Confirmation** window, from the dropdown, select the tab you want to retain on the Single page layout.



Warning: Remaining tabs will be deleted and cannot be recovered even after switching back to Page with Tabs layout.

4. Once you have selected the tab to be retained, click **Yes**.


The page layout is switched to Single Page displaying the retained tab.

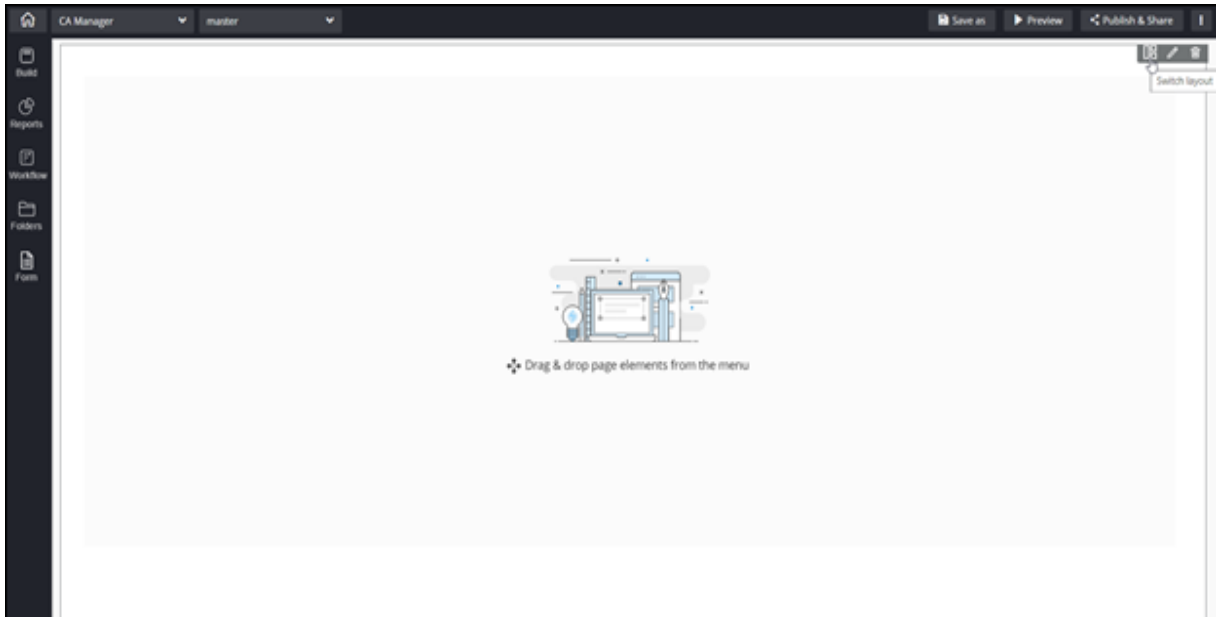


Switching from Single Page Layout to Page with tabs Layout

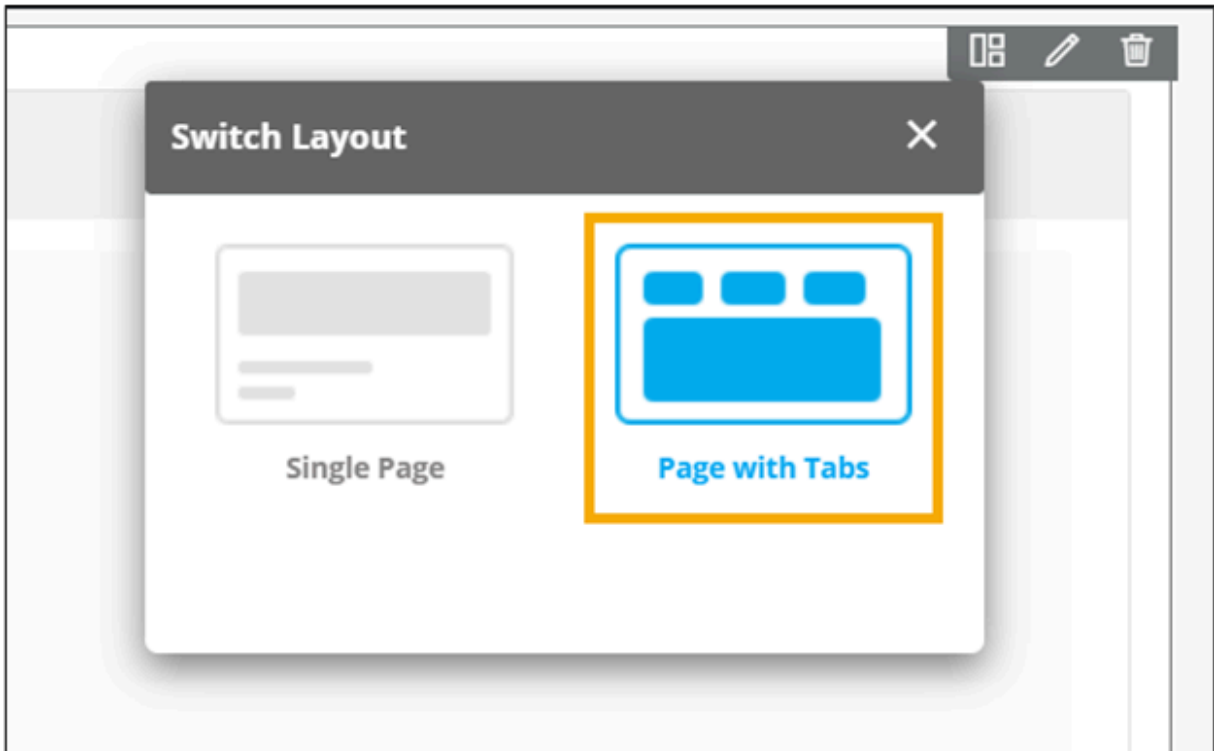
You can create a customized catalog with multiple tabs. There is a provision of adding up to 6 tabs on a page. The tabs can be arranged either horizontally or vertically.

To switch from single page layout to Page with tabs layout:


1. In the build area, from the top right corner of the screen, click .

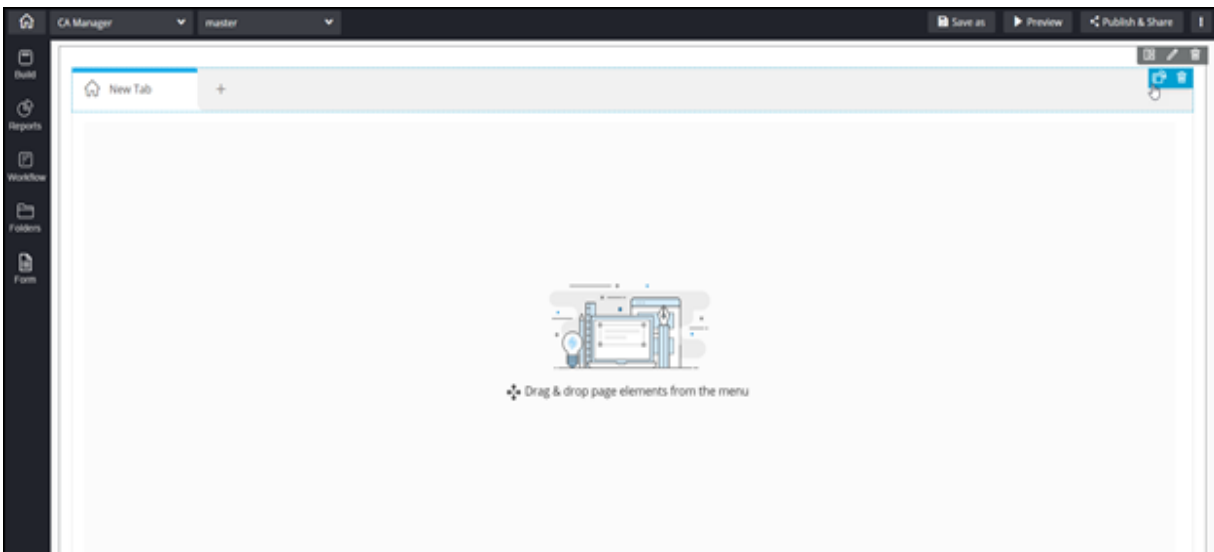



2. In the **Switch Layout** window, click **Page with Tabs**.

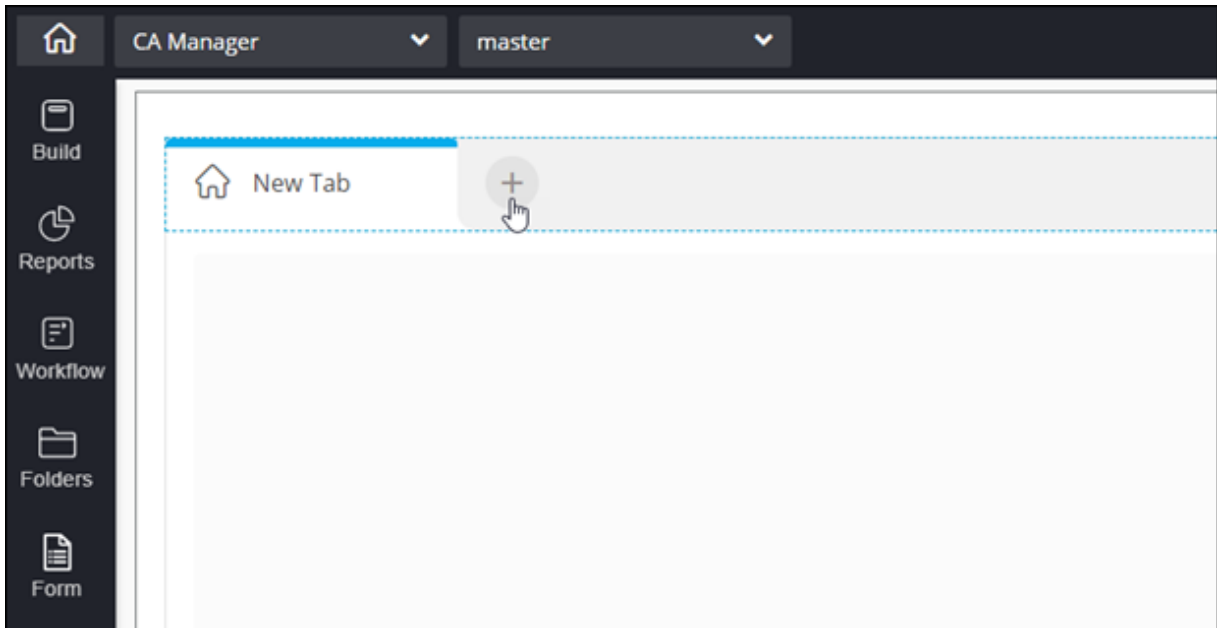


3. Click **Yes** in the **Confirmation** pop-up window.

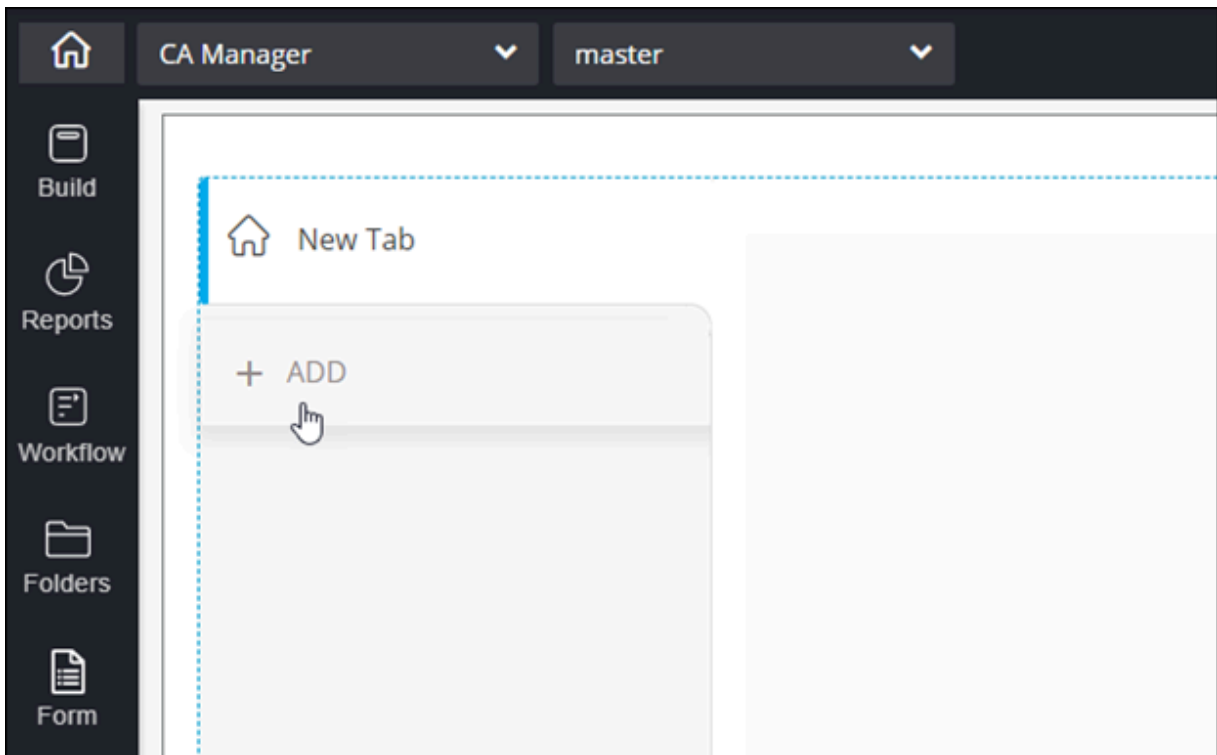
4. To flip between horizontal and vertical tabs, from the top left corner of the screen, click .




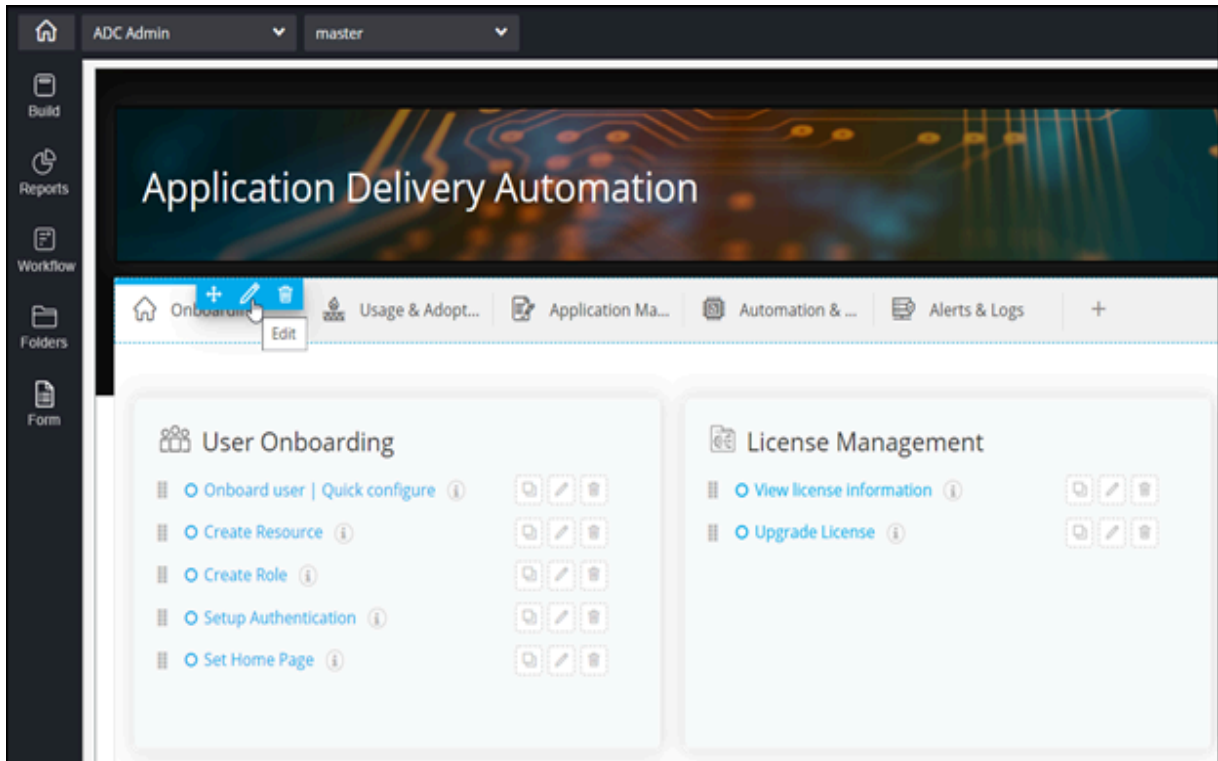
5. To add a tab, when tabs are horizontally oriented, click .



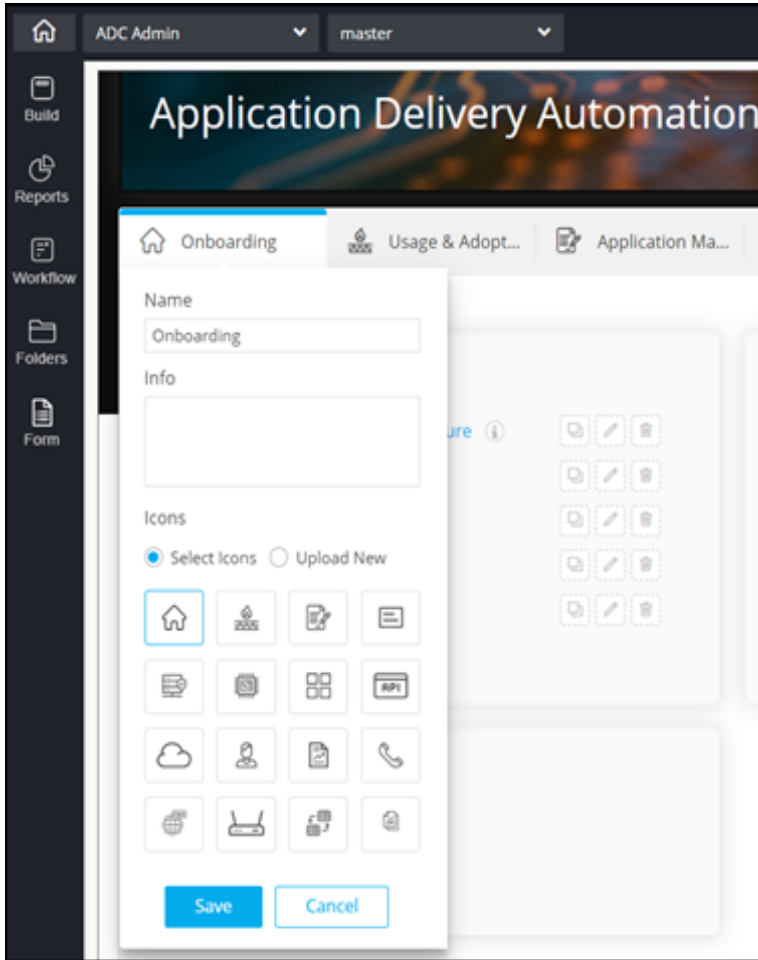
6. To add a tab, when tabs are vertically oriented, click **ADD**.



7. To modify the tab, hover your mouse over the tab and click .




A pop-up window is displayed right below the tab.

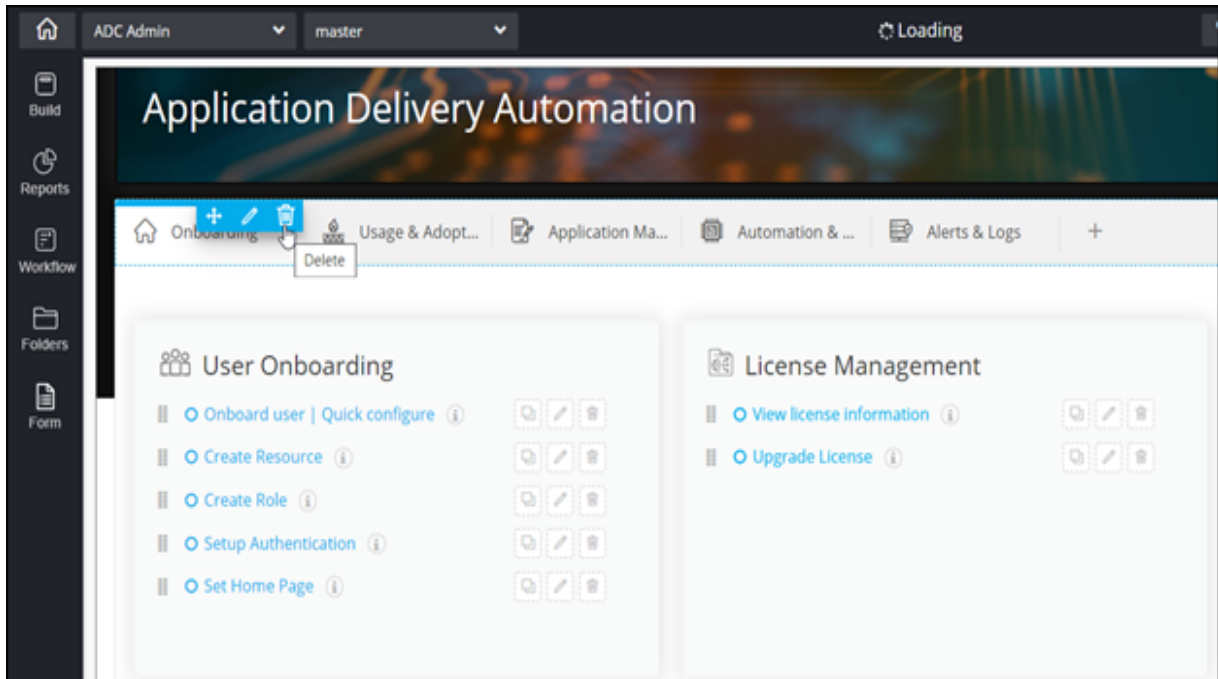


The following options are available here:

- **Name** - Allows you to change the name of the tab.
- **Info** - Allows you to add a tooltip for the tab.
- **Icons** - Allows you to select an icon for the tab from the options displayed or upload a new icon.

8. Click **Save**.


9. To delete a tab, hover your mouse over the tab and click .

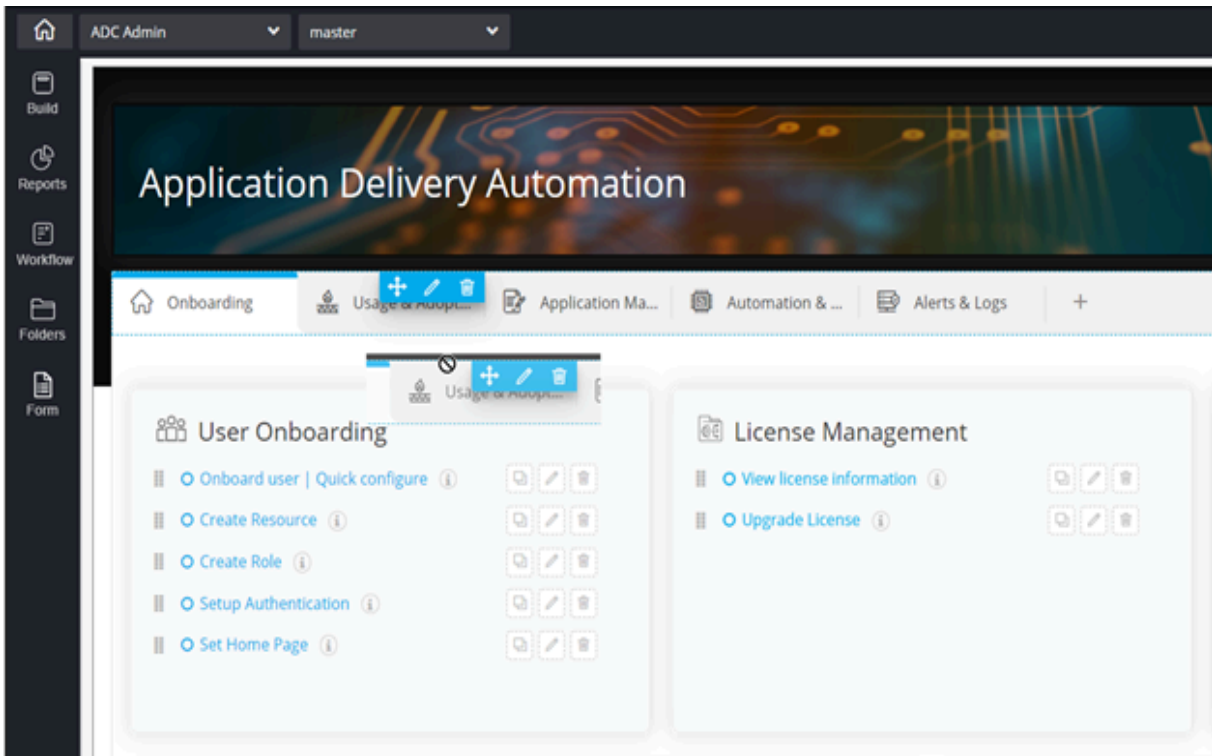


Tab reordering

When the page is in the [Page with tabs](#) mode, you can change the order in which the tabs are arranged.


To move the tabs:

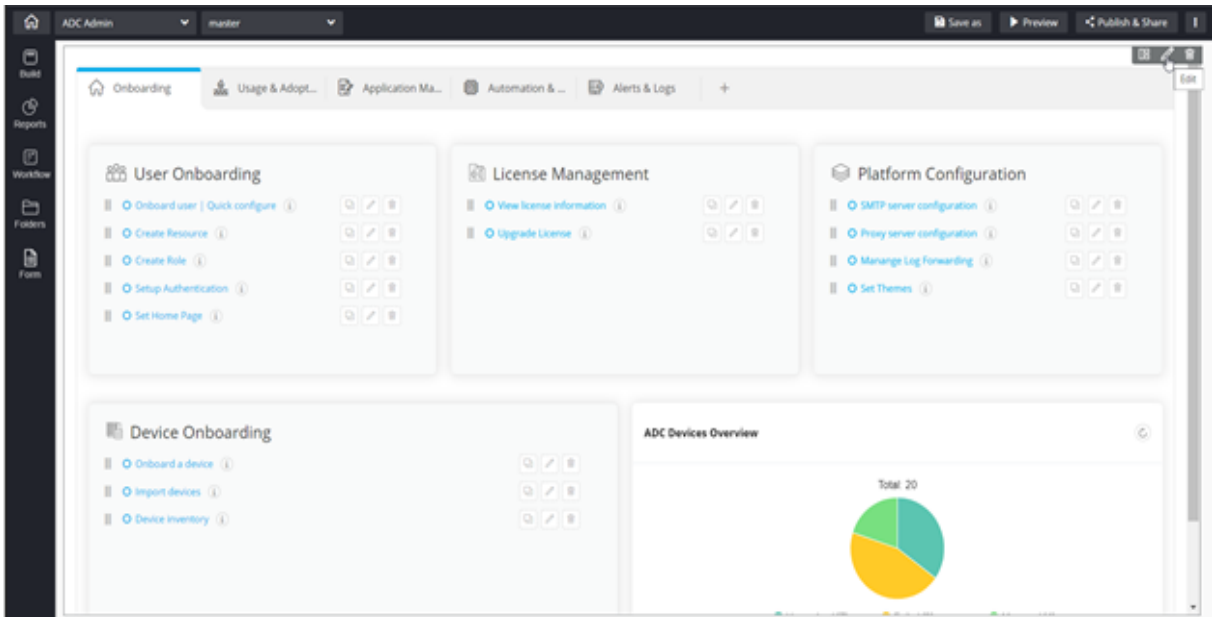
1. Hover your mouse over a tab and click .
2. Drag and drop the tab to a new position.



Modifying page layout

This feature allows you to modify the entire page layout.

1. Open a page from the [Design](#) section.
2. Hover your mouse to the top right corner of the page and click .



The **Layout** pop-up window is displayed with the **Properties** tab open by default.



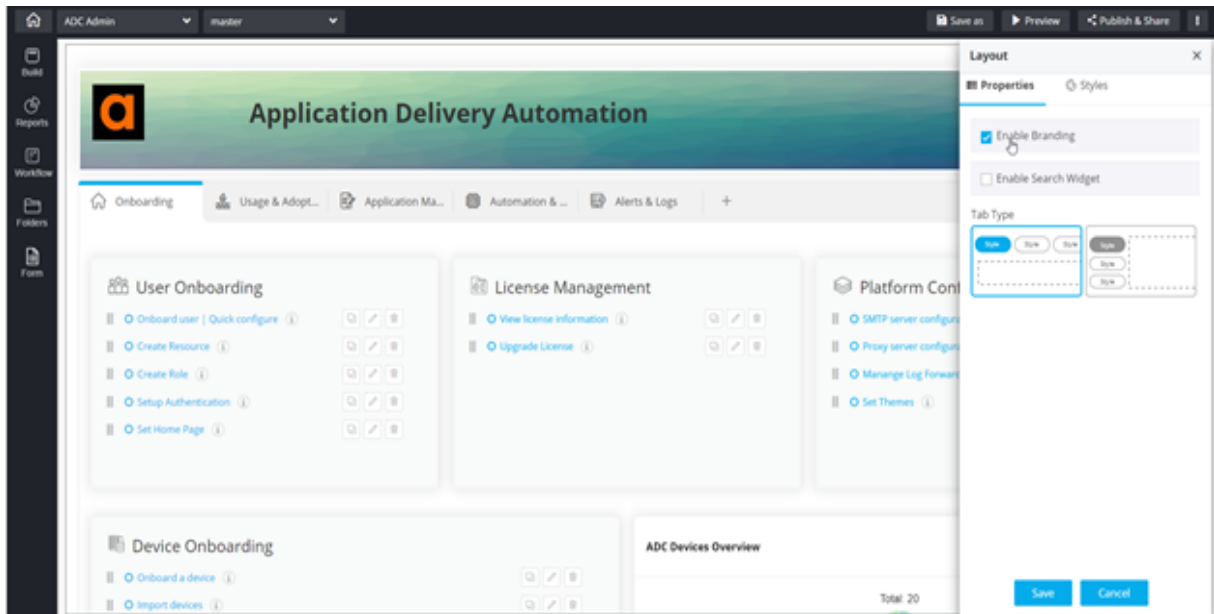
Note: The **Properties** tab is displayed only when the [Page Layout](#) is selected as Page with Tabs. In the Single Page Layout mode, the Layout pop-up window opens displaying the **Styles** tab.

3. To modify the page layout properties, click [here](#).
4. To modify the page layout style, click [here](#).

- [Modifying page layout - Properties](#)
- [Modifying page layout - Styles](#)

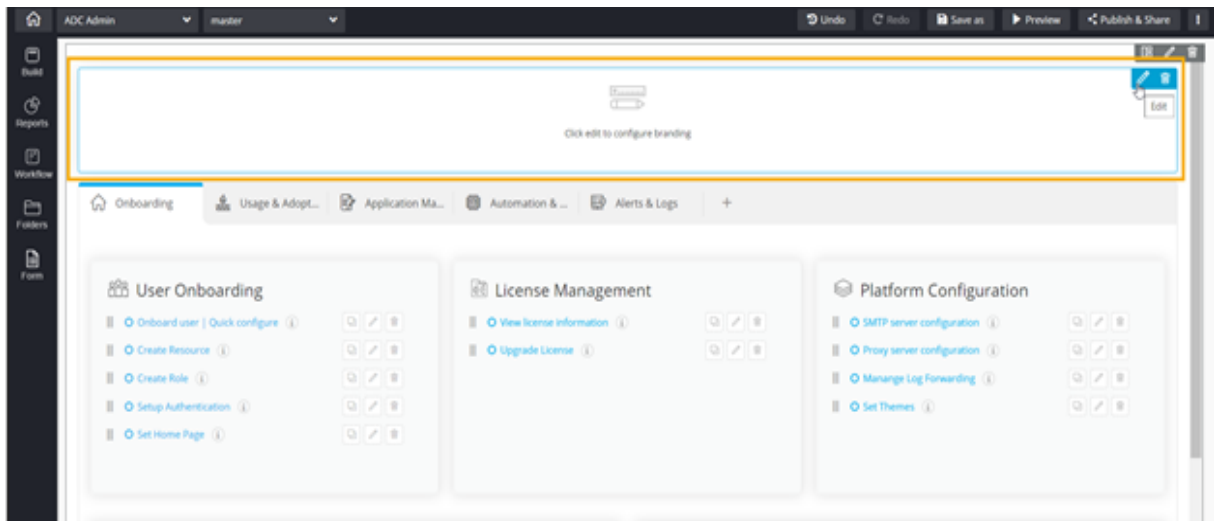
Modifying page layout - Properties

1. To enable Branding, in the **Layout** window, under **Properties**, select the **Enable Branding** checkbox.



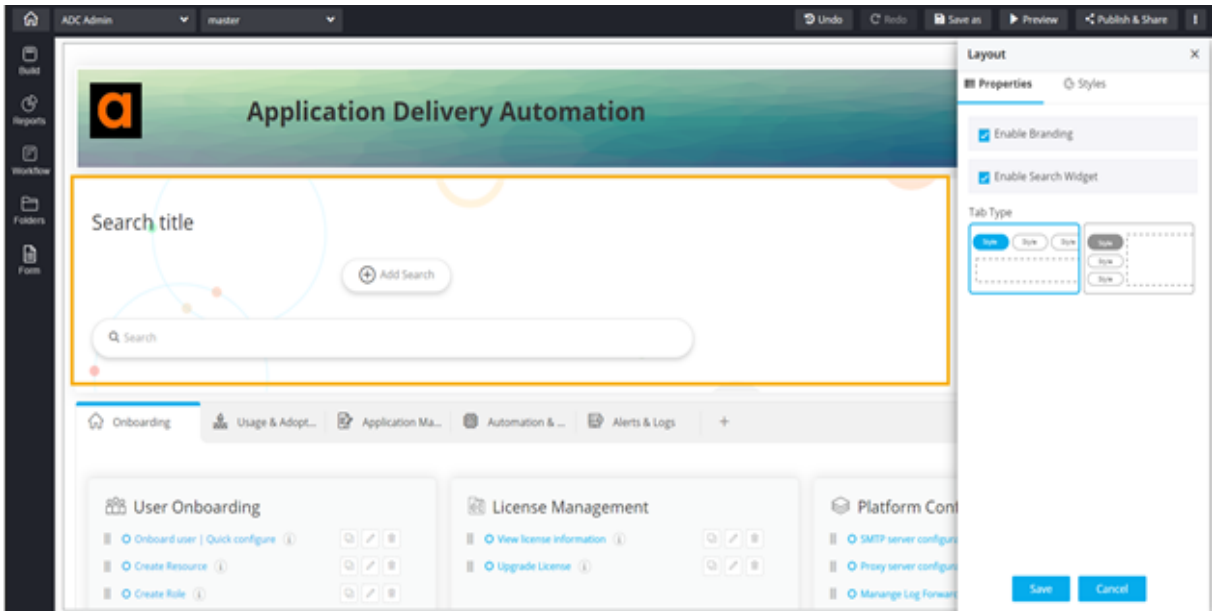
2. Click **Save**.

Branding component is added to the Build area.



3. Configure the **Branding** component.
4. To enable the search widget, in the **Layout** window, under **Properties**, select the **Enable Search Widget** checkbox.
5. Click **Save**.

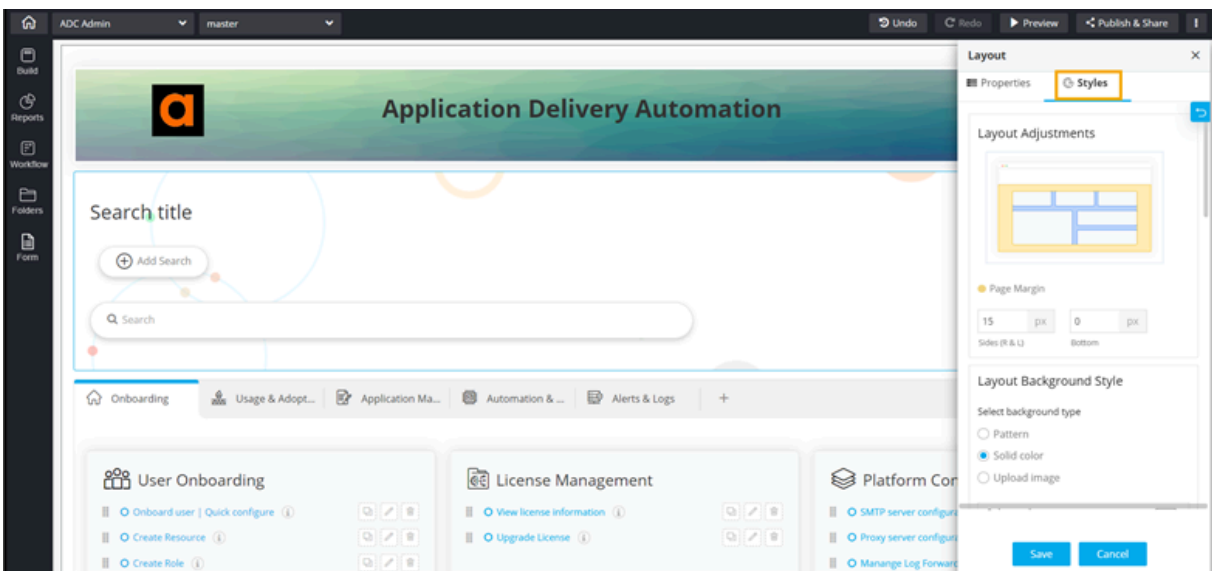
The Search widget is added to the page.



6. Configure the [Search](#) widget.
7. To select the tab orientation, under **Tab Type**, select the required option.

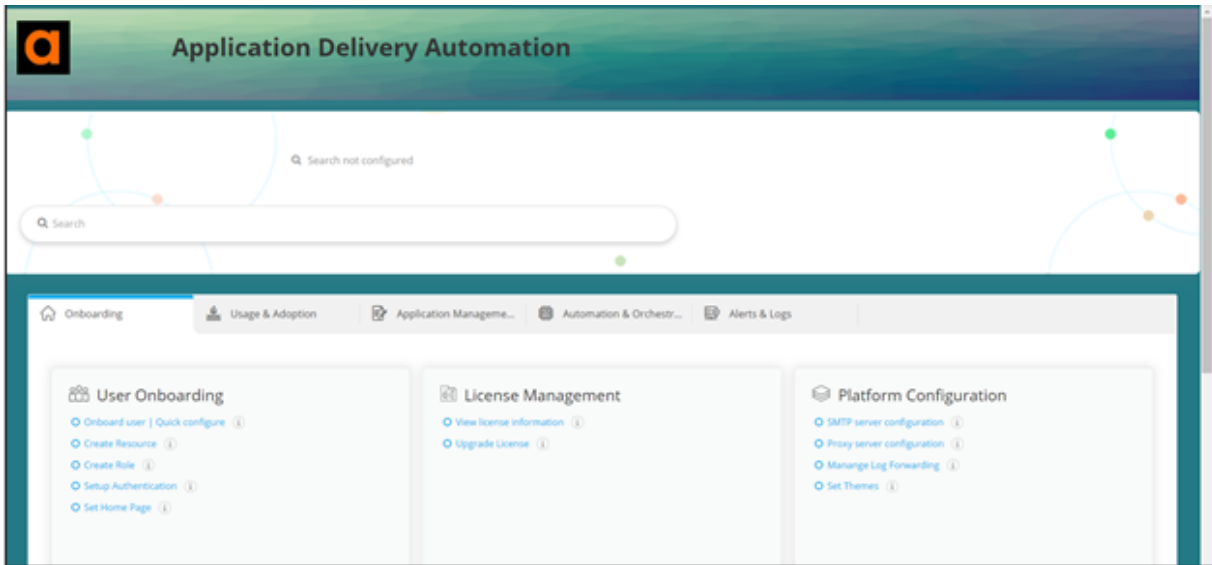
Modifying page layout - Styles

1. For more options to customize the page layout, in the **Layout** window, click **Styles**.



2. Under **Layout Adjustments**, increase/decrease the **Page Margin** at the sides and the bottom.
3. To see the changes reflected on the page, click **Save** and then click **Preview**.

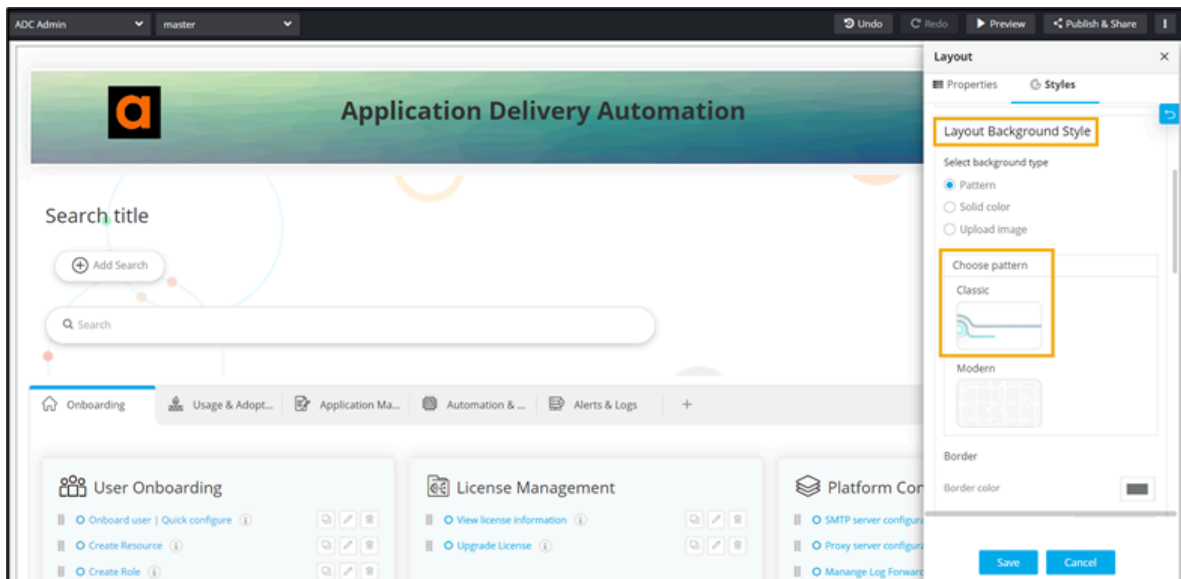
The **Page Margin** settings have been applied to the left, right, and bottom of the page.



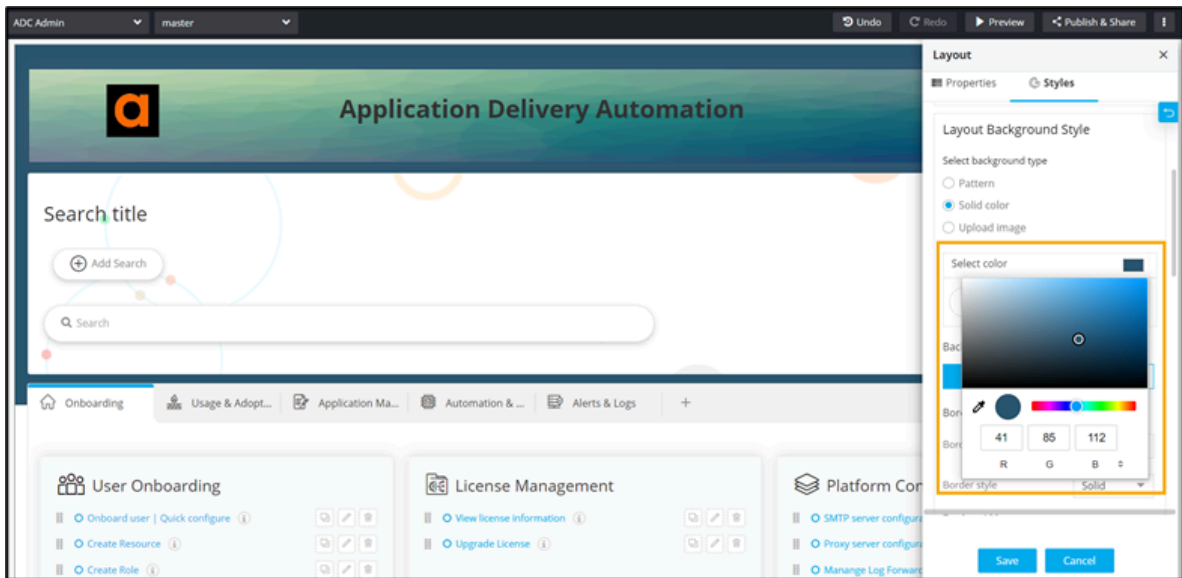
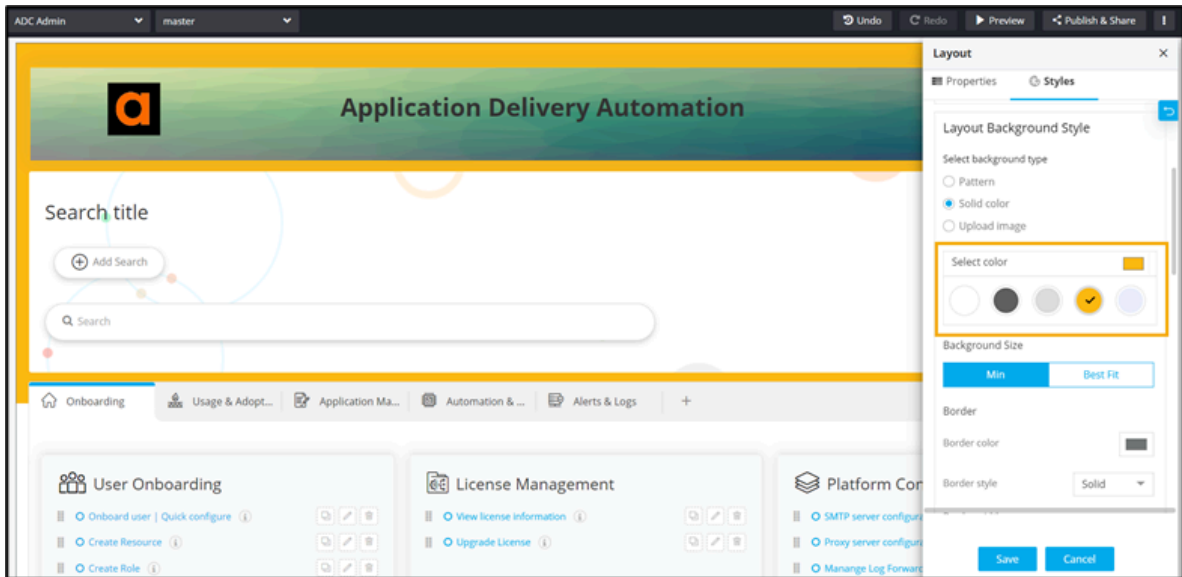
Note: Page margins are not applicable between individual widgets.

4. Under **Layout Background Style**, to change the background, **Select background type** from the available options.

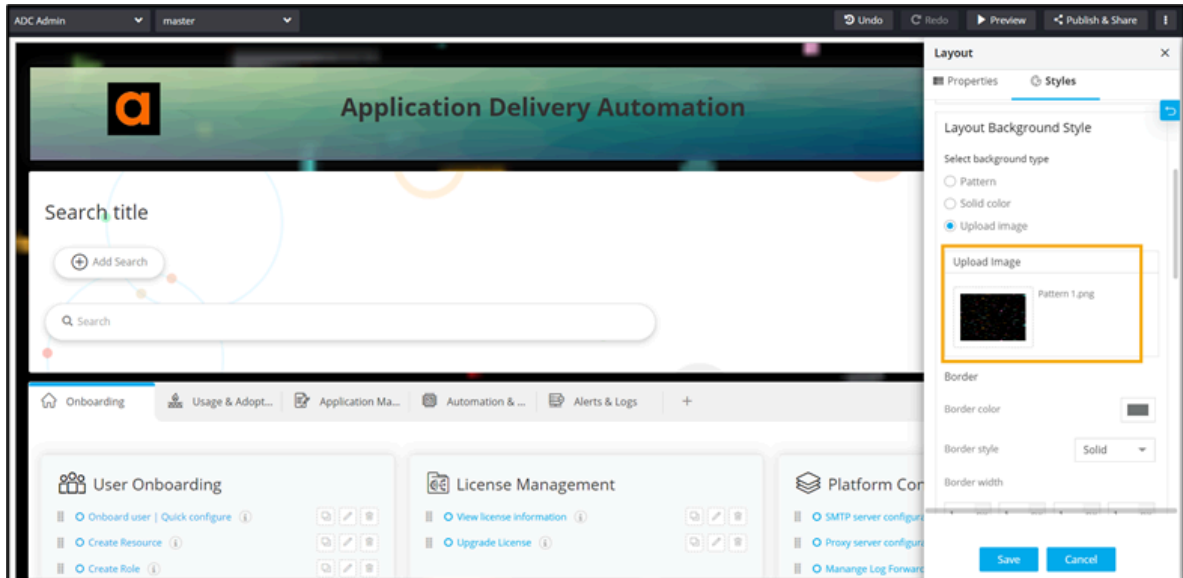
- **Pattern** - Select the **Pattern** option to choose a pattern from the options displayed.



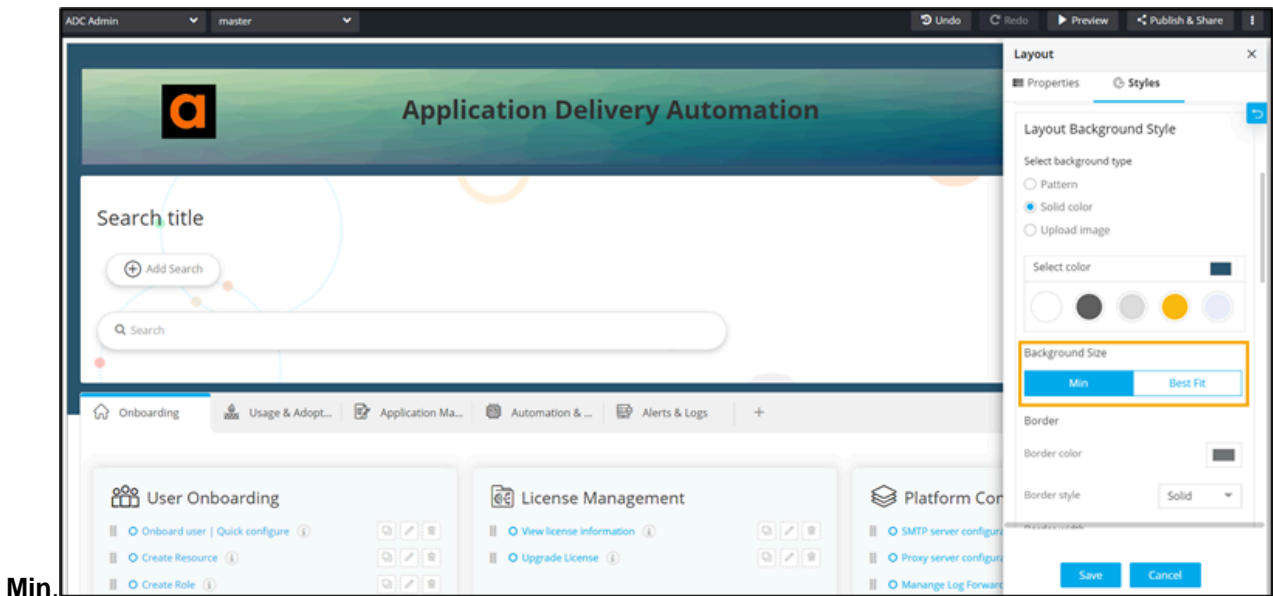
- **Solid color** - Select the **Solid color** option to choose a solid color either from the options displayed or from the color picker.



- **Upload image** - Select the Upload image option to upload an image from your machine as the background image.



5. Under **Background Size**, to set the background color to only a part of the page, select



Min.



Note: This feature is applicable only when the background type is selected as **Solid color**.

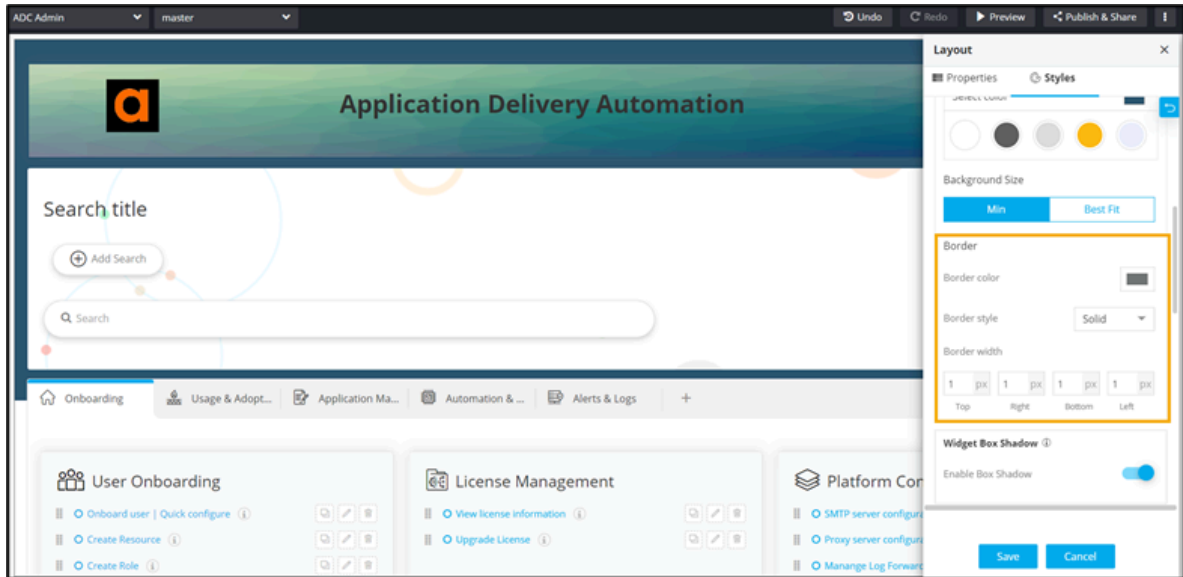
6. Under **Background Size**, to set the background color for the entire page, select **Best Fit**.



Note: This feature is applicable only when the background type is selected as **Solid color**.

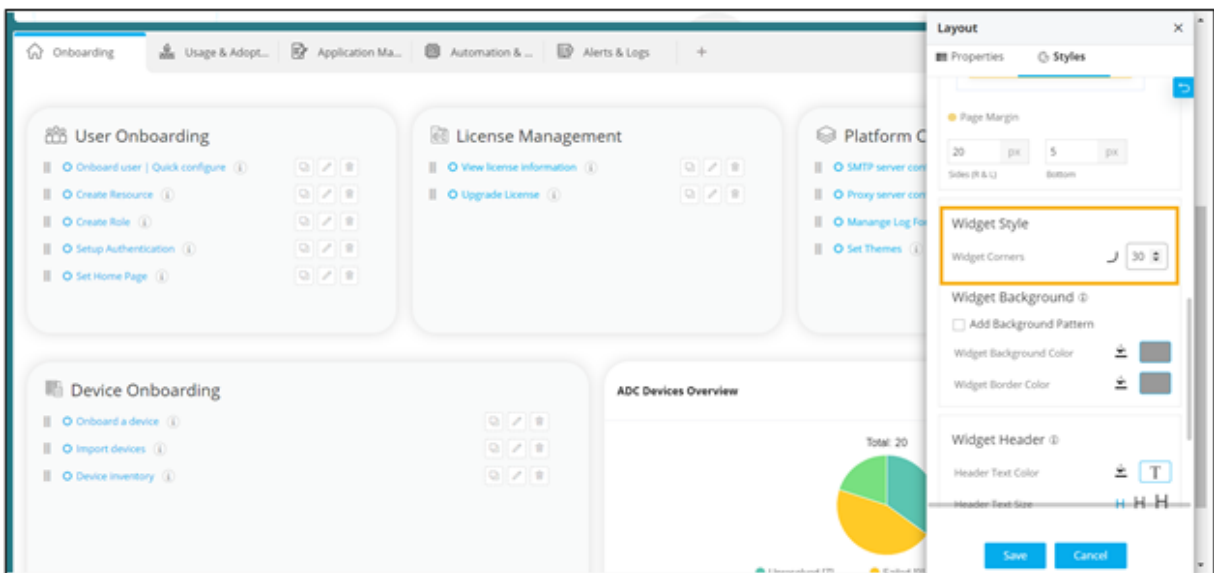
7. Under **Border** section, you can customize the following:

- **Border color** - Select the border color from the color picker. The selected color is applied to the page border.
- **Border style** - Select the border style from the options displayed in the dropdown.
- **Border width** - Select the width of the border at the top, right, bottom, and left of the page.



8. Under **Widget Box Shadow**, to remove the shadow for all widgets on the page, turn off the **Enable Box Shadow** toggle.

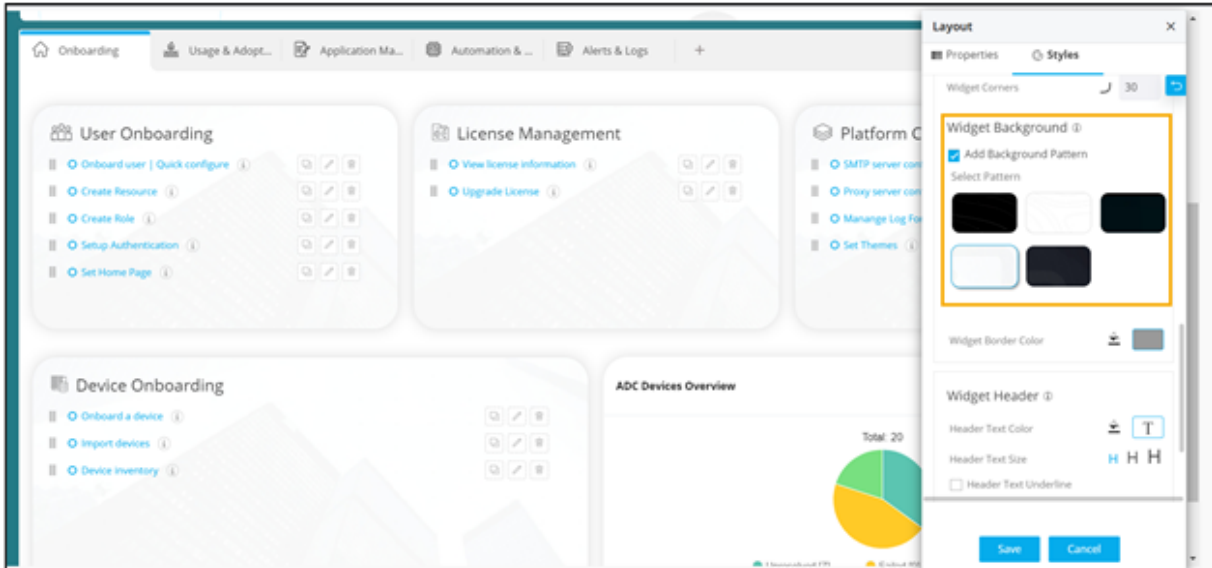
9. Under **Widget Style**, increase/decrease the curvature of the **Widget corners**.




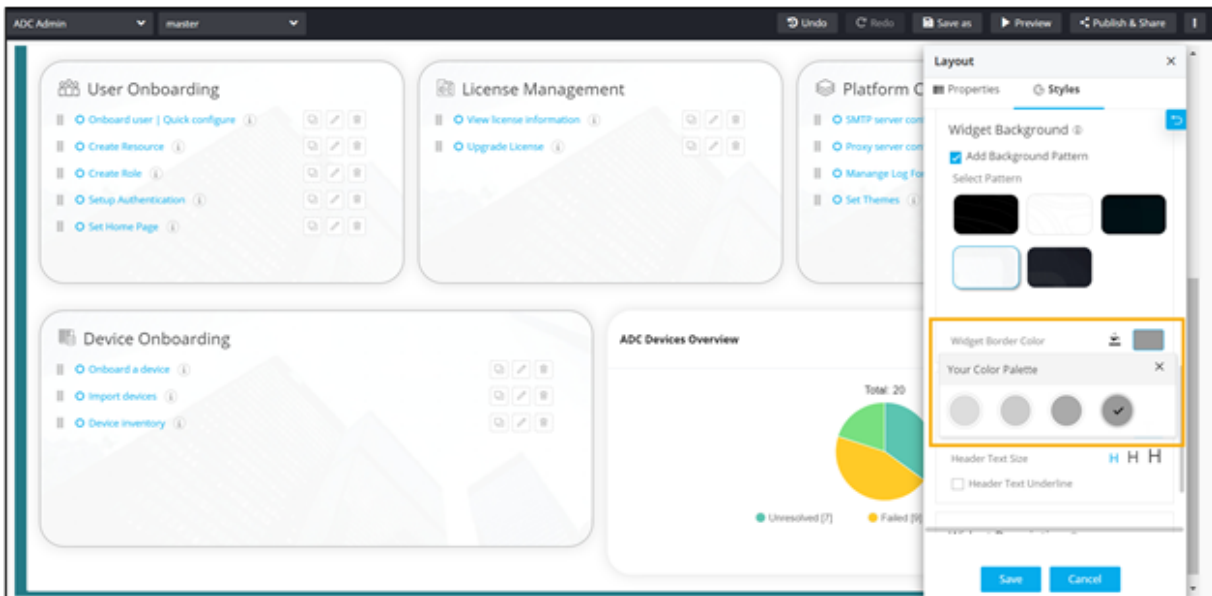
10. Under **Widget Background**, to add a background pattern, select the **Add Background Pattern** checkbox.

11. Select a pattern from the options available.

The selected pattern is applied to all the widgets on the page.





12. Select the **Widget Border Color** from the color picker  or **Your Color Palette**.

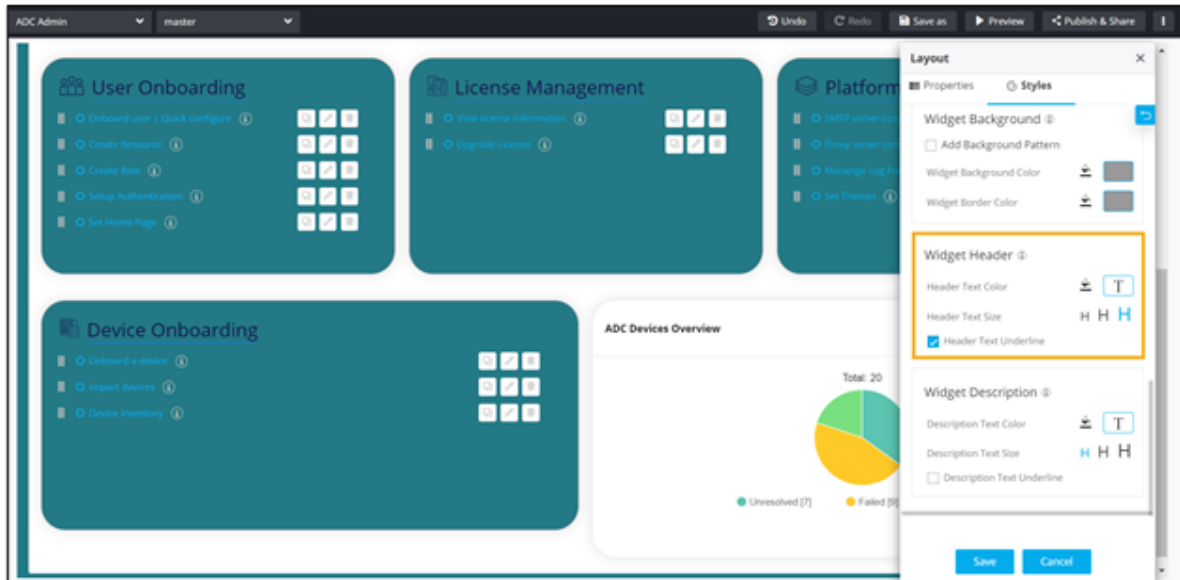



13. Under **Widget Background**, select the **Widget Background Color** from the color picker  or **Your Color Palette**.




Note: The **Widget Background Color** option is displayed only when the **Add Background Pattern** checkbox is **not** selected.

14. Under the **Widget Background** section, select the **Widget Border Color** from the color picker  or **Your Color Palette**.
15. Under the **Widget Header** section, the following options are available:
 - **Header Text Color** - Select the **Header Text Color** from the color picker  or **Your Color Palette**.
 - **Header Text Size** - Select the **Header Text Size** from the available options.
 - **Header Text Underline** - Select the **Header Text Underline** checkbox to underline the Header Text.



 **Note:** Widget Header style changes are applicable to only those widgets that have a widget header.

16. Under the **Widget Description** section, the following options are available:

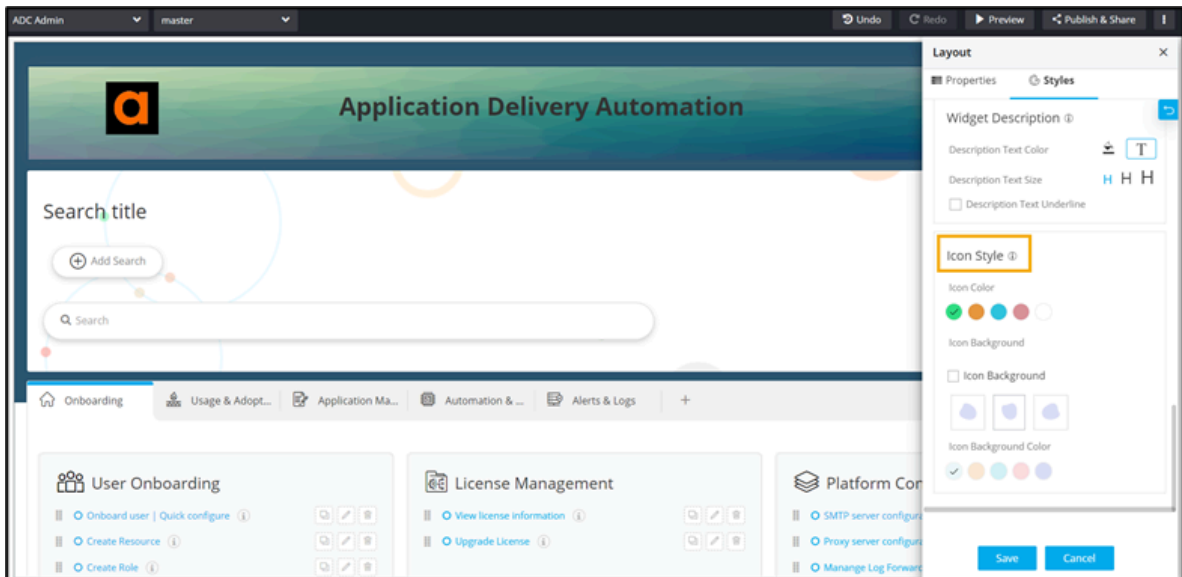
- **Description Text Color** - Select the **Description Text Color** from the color picker  or **Your Color Palette**.
- **Description Text Size** - Select the **Description Text Size** from the available options.
- **Description Text Underline** - Select the **Description Text Underline** checkbox to underline the Header Text.



Note: Widget Header style changes are applicable to only those widgets that have a widget header.


17. Under the **Icon Style** section, choose from the following available options:

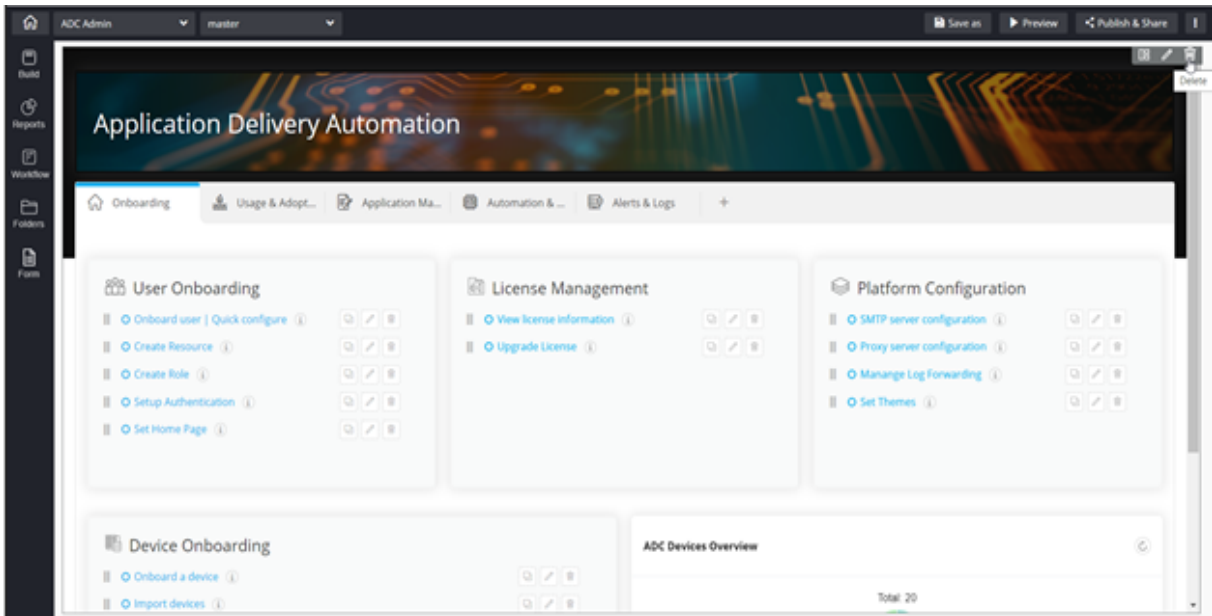
- **Icon Color** - Select the Icon Color from the available options.
- **Icon Background** - Select the Icon Background from the available options.
- **Icon Background Color** - Select the Icon Background Color from the available options.



Deleting a Page

You can delete the entire page in one go.

1. From the **Design** section, open the page that is to be deleted.
2. Hover your mouse to the top right corner of the page and click .



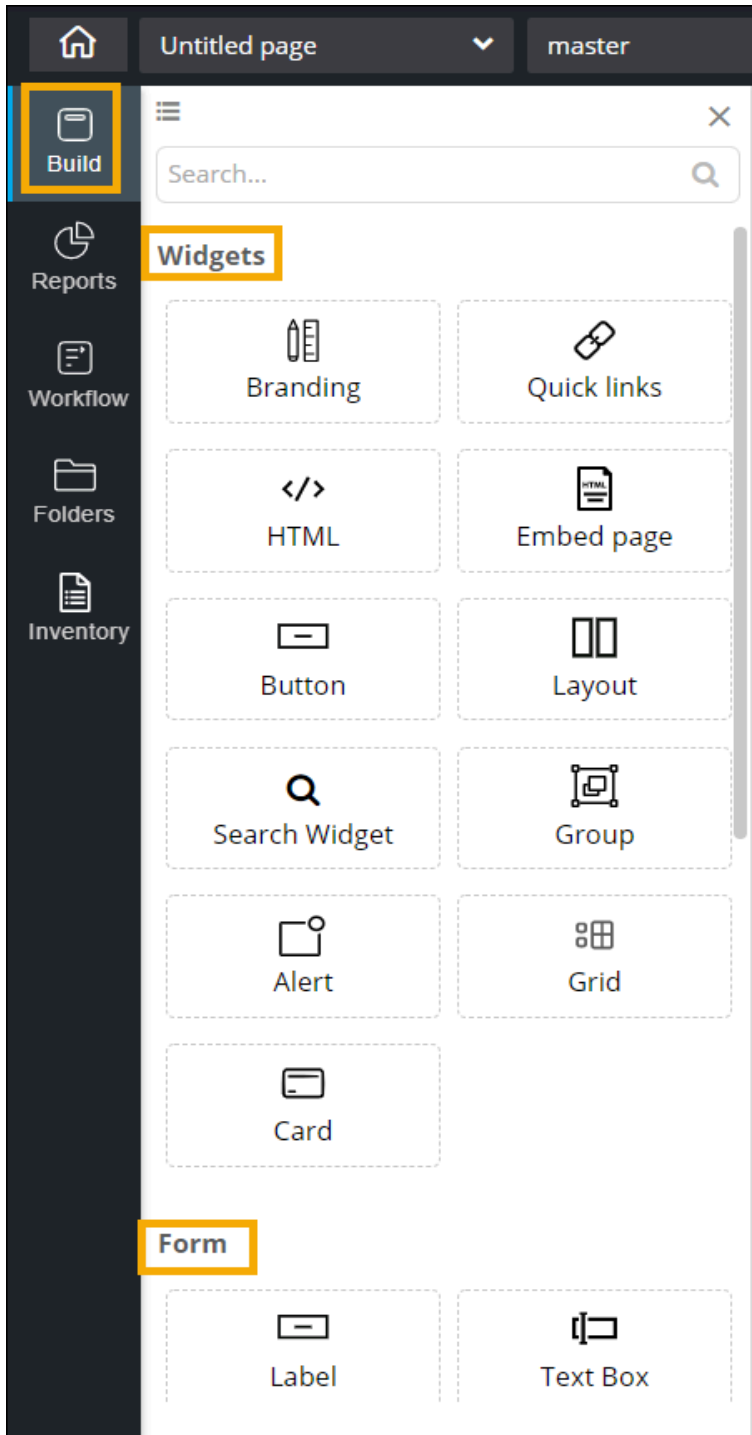
3. In the **Confirmation** pop-up window, click **Yes**.
The page is deleted.

! **Important:** This action cannot be undone.


Build

Self-service Pages module allows you to build your custom page by using the Build component. You can simply drag and drop components from this section to design a customized page.

1. **Design** a new page.
2. From the component panel on the left, click **Build**.
A list of Page elements is displayed.



This table describes the options available in this section:

Group	Option	Description
		Allows you to toggle between a list view and grid view of the components.

Group	Option	Description
	Search bar	Allows you to search for a particular component.
Widgets		
	Branding	Allows you to configure branding for your page.
	Quick links	Allows you to add a quick links widget to your page.
	HTML	Allows you to create your own HTML page within the Page.
	Embed page	Allows you to Embed a page into the Page.
	Button	Allows you to add buttons for redirecting to internal/external web pages from the catalog.
	Layout	Allows you to arrange widgets within a layout.
	Search widget	Allows you to add a search widget to the page.
	Group	Allows you to create groups for clubbing similar components/widgets together in the Page.
	Alert	Allows you to add and view Visual Workflow Alerts in the Page.
	Grid	Allows you to add a Grid component to your Page.
	Card	Allows you to add a card component with option to add multiple links, buttons and content.
Form		
	Label	Allows you to add a Label to the form in your Page.
	Text Box	Allows you to add a Text Area to the form in your Page.
	Password	Allows you to add a Password field to the form in your Page.
	Date Time Picker	Allows you to add a Date Time Picker field to the form in your Page.
	Text Area	Allows you to add a Multi-select Box to the form in your Page.
	Radio Button	Allows you to add a Radio button to the form in your Page.
	Checkbox	Allows you to add a Checkbox to the form in your Page.
	Select Box	Allows you to add a Select Box to the form in your Page.

Group	Option	Description
	Multi-select Box	Allows you to add a Multi-select Box to the form in your Page.
	Form Button	Allows you to add a Form Button to the form in your Page.
	Download	Allows you to add a Download field/link to the form in your Page.
	File Upload	Allows you to add a File Upload field to the form in your Page.
	Script Editor	Allows you to add a Script Editor to the form in your Page.
	Tabular	Allows you to add a tabular feature to the form in your Page.
	Form Group	Allows you to define a Form Group to your form in the Page.
	Rich Text Editor	Allows you to add a text editor to the form in your Page.

- [Widgets](#)

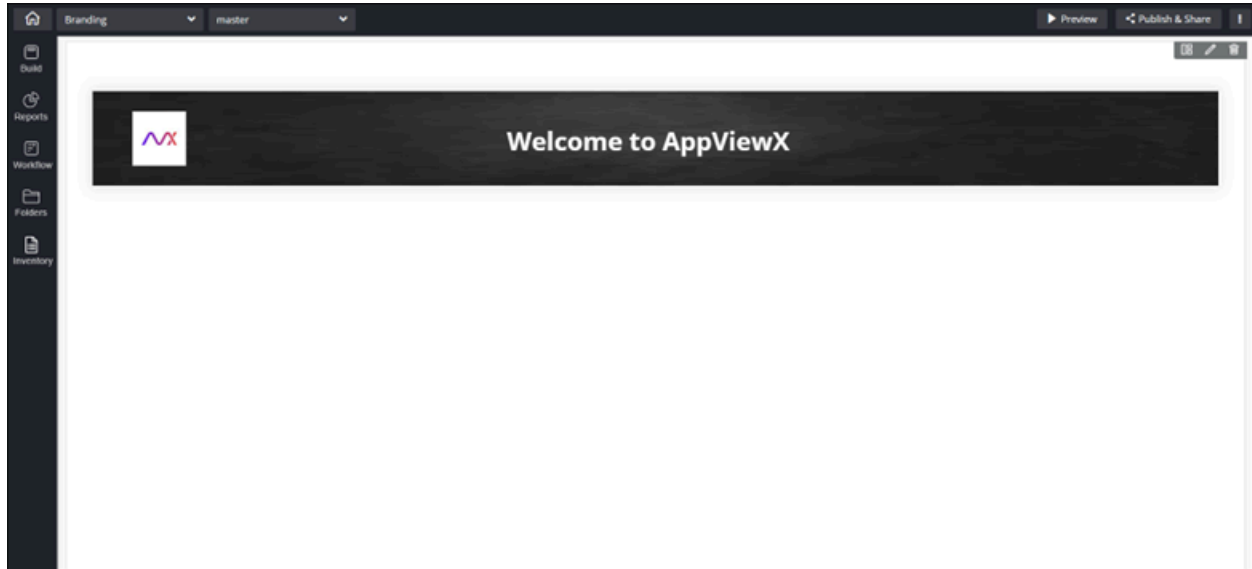
Widgets

You can add different elements to your page in the form of widgets, configure them, and customize them as per your requirement.

- [Branding](#)
- [Quick links](#)
- [HTML](#)
- [Embed page](#)
- [Button \(Action Widget\)](#)
- [Layout](#)
- [Search widget](#)
- [Group](#)
- [Alert](#)
- [Grid](#)
- [Card](#)

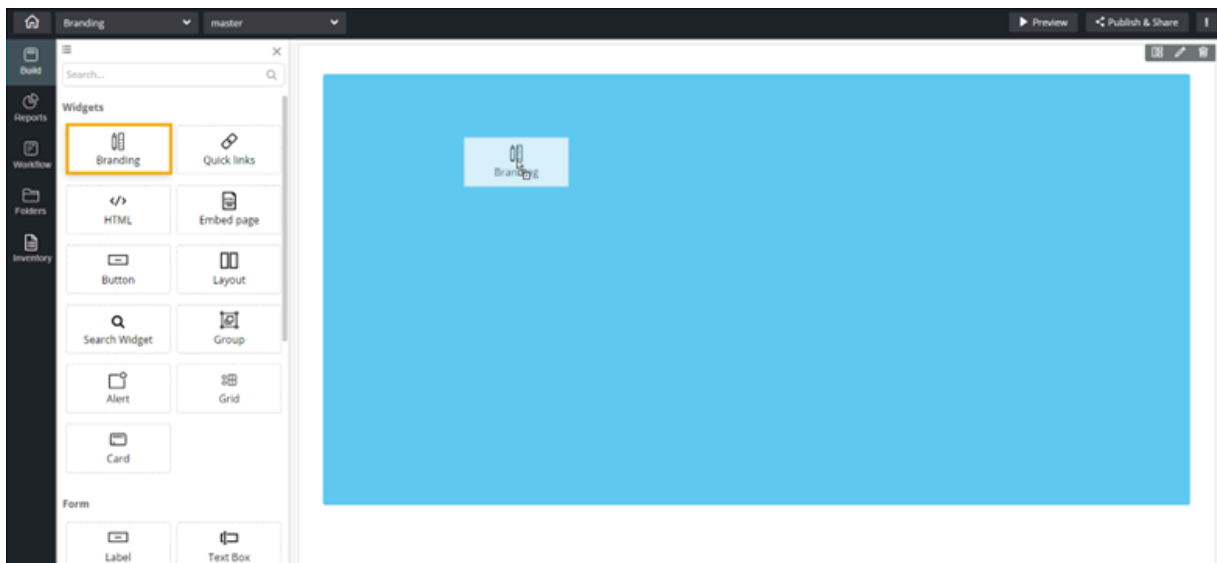
Branding

Self-service Pages module allows you to add the company logo on your page using the Branding component.



To add the Branding widget to your page:


1. [Design](#) a page.
2. Drag and drop the **Branding** component to any blue highlighted space on the canvas.



3. To configure the Branding widget **Properties**, click [here](#).
4. To configure the Branding widget **Styles**, click [here](#).

- [Configuring Branding - Properties](#)
- [Configuring Branding - Styles](#)

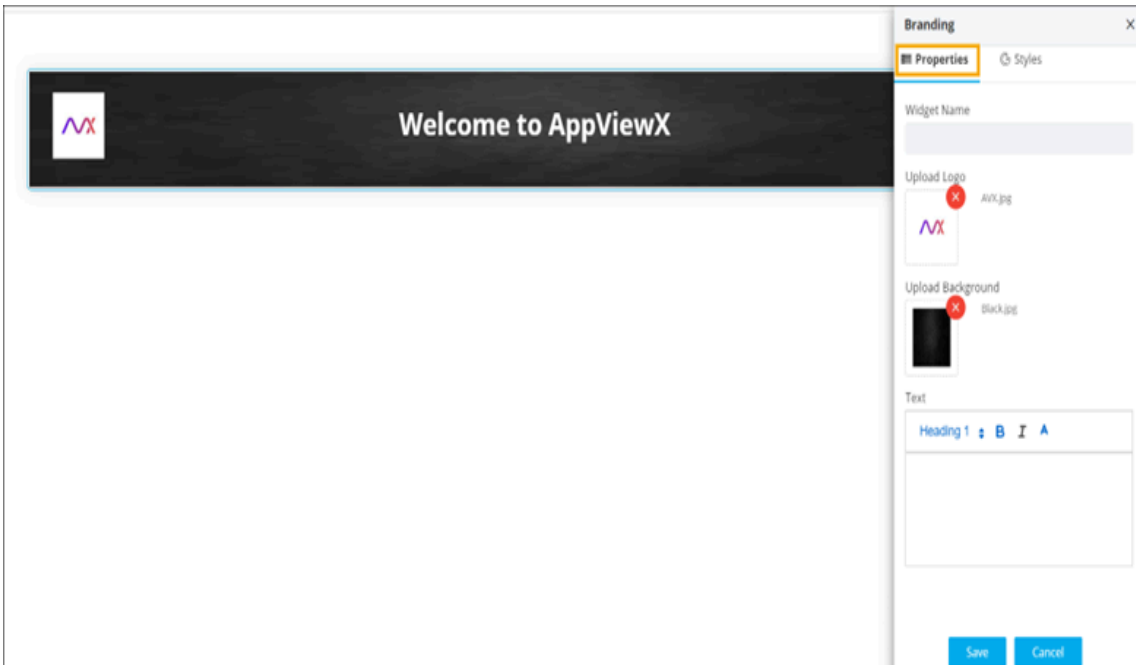
Configuring Branding - Properties

1. To configure the Branding widget, hover your mouse over the widget and click .



The **Branding** pop-up window opens with the **Properties** tab open by default.

2. In the **Branding** window, under **Properties**, enter or select the required fields.

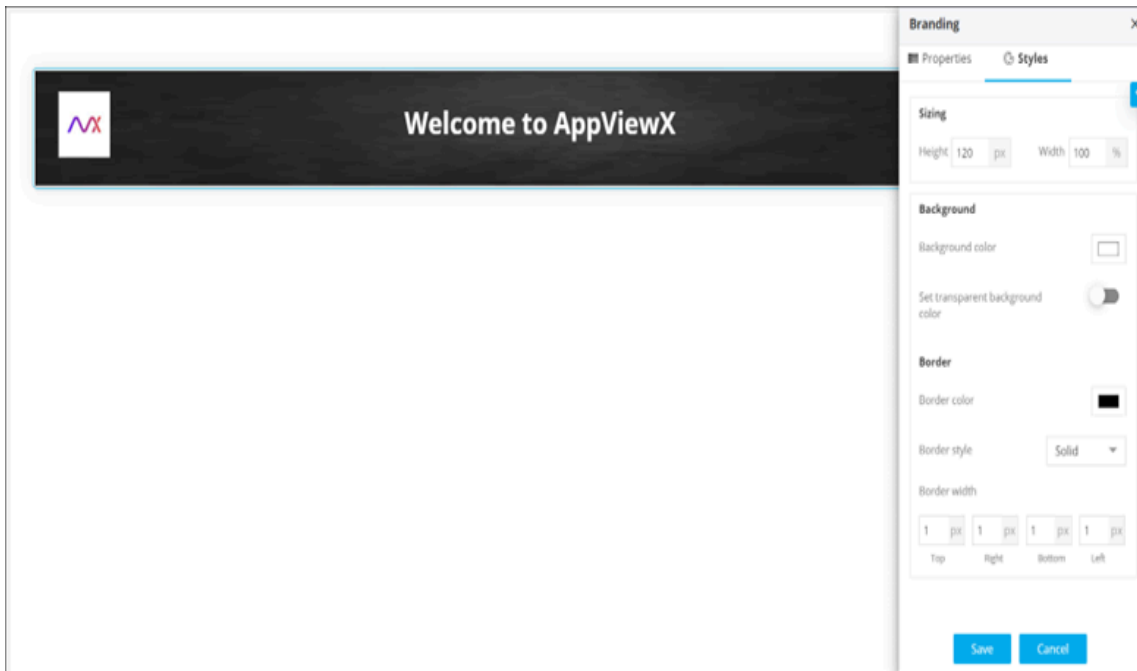


The following table describes the various fields under the **Properties** tab:

Field	Description
Widget Name	Enter a suitable widget name. For example, AppViewX.
Upload Logo	Upload the appropriate logo, if required.
Upload Background	Upload a suitable background.
Text	Enter the text that will be displayed in the Branding widget, next to the logo.

Configuring Branding - Styles


1. For more options to customize the widget, in the **Branding** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

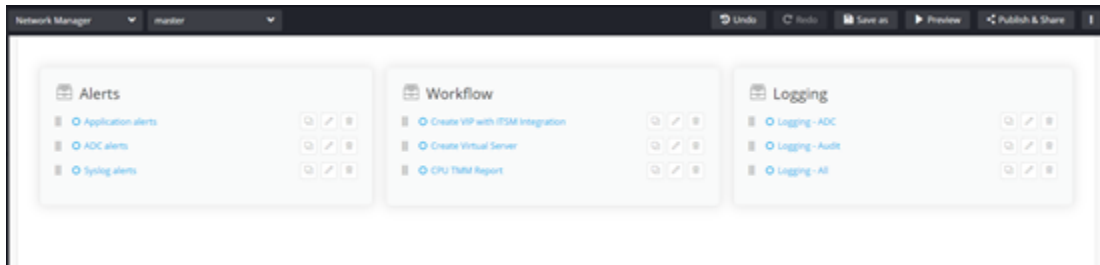
Option	Description
Sizing	Allows you to increase/decrease the height and width of the widget.
Background	The following options are available here: <ul style="list-style-type: none"> • Background color: Allows you to select a background color for the branding widget. • Set transparent background color: To set the background color as transparent, turn on the toggle.
Border	The following options are available here: <ul style="list-style-type: none"> • Border color: Allows you to select the border color. • Border style: Allows you to select the border style from the options available in the dropdown. • Border width: Allows you to adjust the width of the border.

2. Click **Save**.

3. Drag and drop the background image and text to move it to any position within the widget and resize the company logo.
4. to restore settings to default, click .

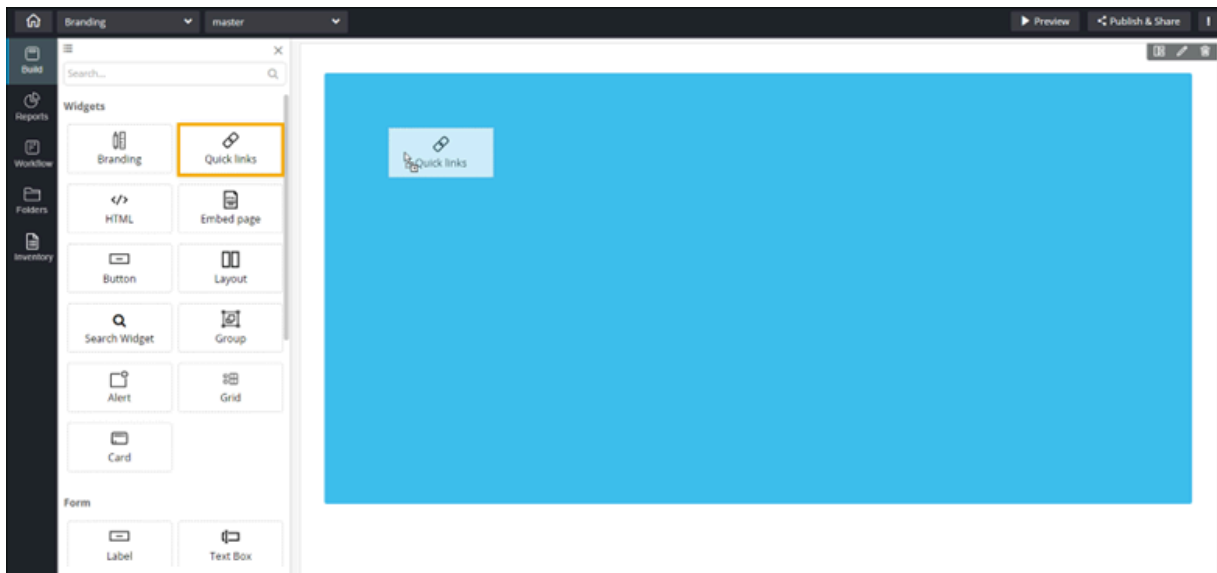
Quick links

Self-service Pages module allows you to add Quick links to your page for redirecting end users to specific features within (ADC, Certificates, Reports etc.) and outside AppViewX (Jira etc). Clicking on a Quick link within the widget redirects to a new tab.



To add Quick links component to your page:

1. Drag and drop the **Quick links** component to any blue highlighted space on the page.



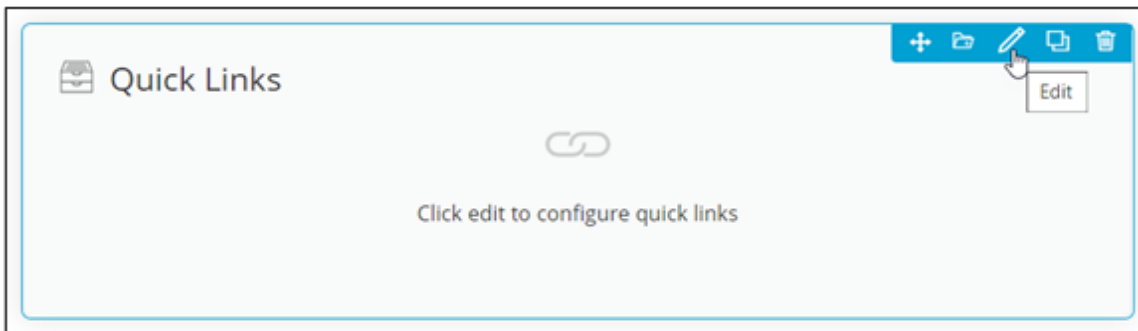
2. To configure Quick links **Properties**, click [here](#).
3. To configure Quick links **Styles**, click [here](#).

- [Configuring Quick links - Properties](#)
- [Adding an Internal Quicklink](#)

- Adding Other/External Quicklinks
- Adding a Workflow Quicklink
- Configuring Quicklinks - Styles
- Editing and Deleting Quicklinks

Configuring Quick links - Properties

1. To configure the Quick links component, hover your mouse over the widget and click .

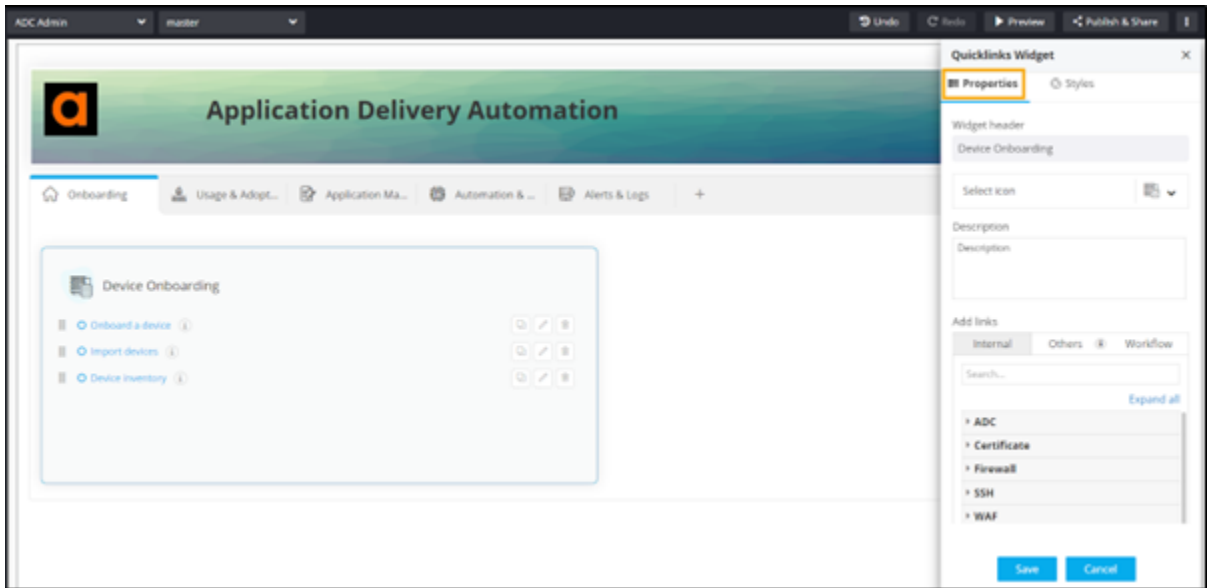


The **Quicklinks Widget** pop-up window opens with the **Properties** tab open by default.

The following table describes the various fields under the **Properties** tab:

Field	Description
Widget Header	Provide a name for the Widget Header. For example, Quick Links.
Select icon	Select an icon for the Quick Links widget from the dropdown.
Add Links	There are three types of links that can be added: <ul style="list-style-type: none"> • Internal: Add an internal link from within AppViewX pages. • Others: Add links to other pages within AppViewX or embed external cross origin enabled pages. • Workflow: Add a workflow link which redirects to the workflow execution page.

2. In the **Quicklinks Widget** window, under **Properties**, enter or select the required field information.




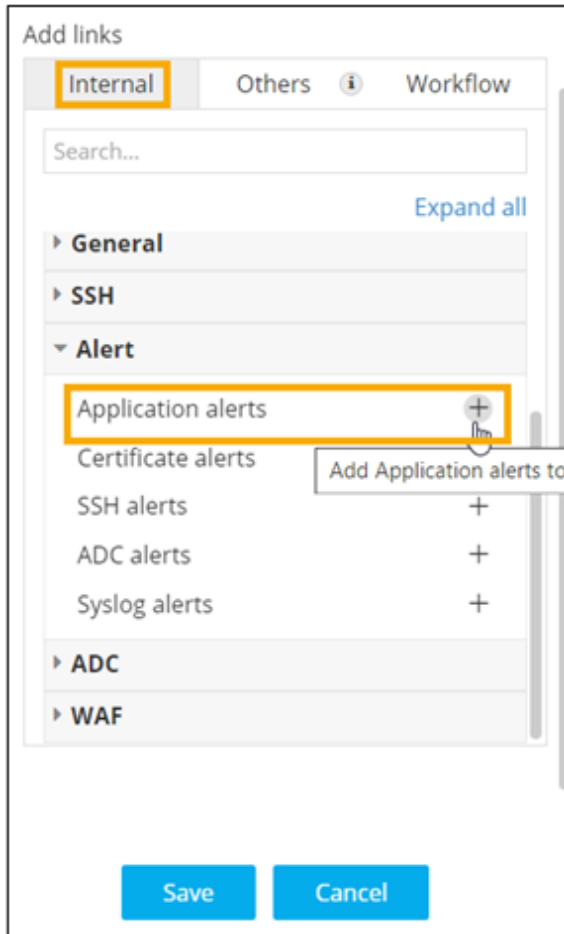
The following table describes the various fields under the **Properties** tab:

Field	Description
Widget Header	Provide a name for the Widget Header. For example, Quick Links.
Select icon	Select an icon for the Quick Links widget from the dropdown.
Add Links	There are three types of links that can be added: <ul style="list-style-type: none"> • Internal: Add an internal link from within AppViewX pages. • Others: Add links to other pages within AppViewX or embed external cross origin enabled pages. • Workflow: Add a workflow link which redirects to the workflow execution page.

3. Click **Save**.

Adding an Internal Quicklink

1. To link an internal AppviewX page to the widget, under **Add links**, click **Internal**.
2. To select a link to be added to the widget, click .



3. To add selected links to the widget, click **Save**.
Clicking on the quick link will redirect to the selected page in a new tab.
4. For more options to customize Quicklinks, click [here](#).

Adding Other/External Quicklinks

1. To embed an external link or a cross origin enabled page URL into the Quick link widget, under **Add links**, click **Others**.
2. Enter the **Name** and **URL** for the link.

The screenshot shows a dialog box titled "Add links" with three tabs: "Internal", "Others", and "Workflow". The "Others" tab is selected and highlighted with an orange border. Below the tabs, there are two input fields: "Name" with the text "Logging - ADC" and "URL" which is currently empty. A blue button labeled "Add to widget" is positioned below the input fields. At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

3. To add this external link to your widget, click **Add to Widget**.
Clicking on the quick link will redirect to the configured external page.
4. For more options to customize Quicklinks, click [here](#).

Adding a Workflow Quicklink

1. To add a link to redirect to the Workflow Request execution page for the selected workflow, under **Add links**, click **Workflow**.
2. Enter the link **Name** and select the **Workflow URL** from the dropdown.

Add links

Internal Others **Workflow**

Name
Create Virtual Server

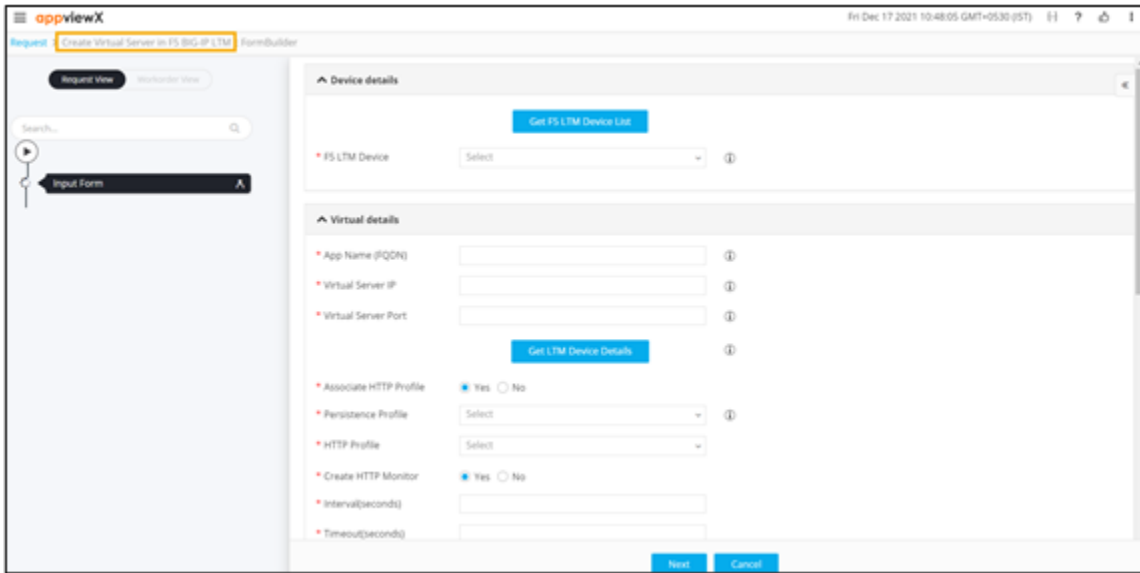
Workflow URL
Select...
DNS Infoblox A Record OOB
Create Virtual Server in F5 BIG-IP LTM
Push aFlex scripts
SSI Automation in SI R

Add to widget

Save Cancel

3. To add this workflow URL to the Quick Links widget, click **Add to Widget**.

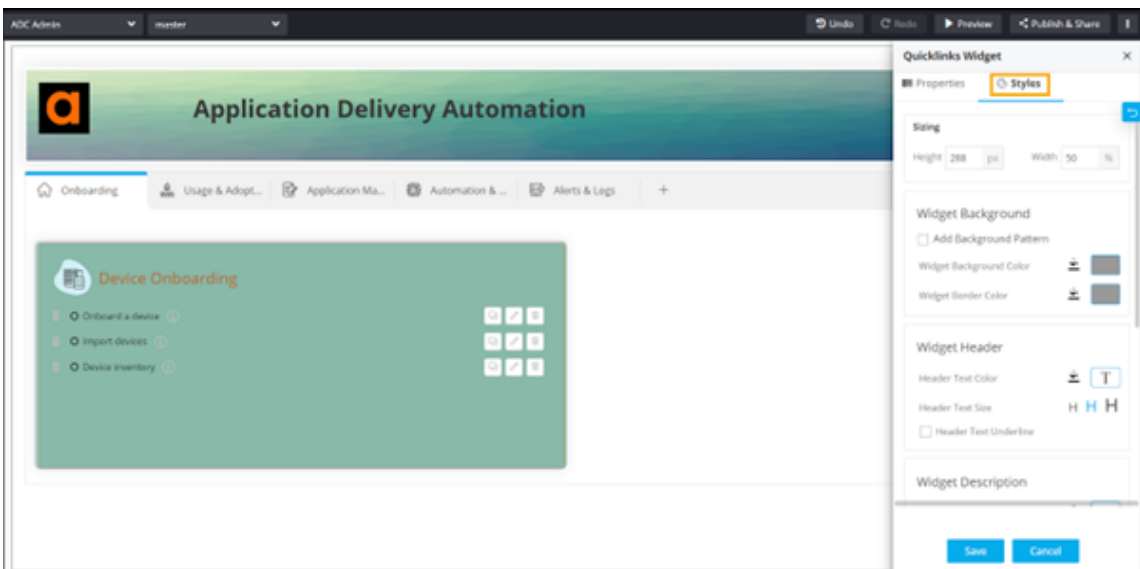
Clicking on the quick link will redirect to the workflow request execution page of the selected workflow.



4. Once you have added the required workflow URLs to the widget, click **Save**.
5. For more options to customize the widget, click [here](#).

Configuring Quicklinks - Styles


1. For more options to customize the widget, in the **Quicklinks Widget** window, click **Styles**.



The following table describes the options available under the **Styles** tab:


Field	Description
Sizing	Allows you to increase/decrease the height and width of the widget.

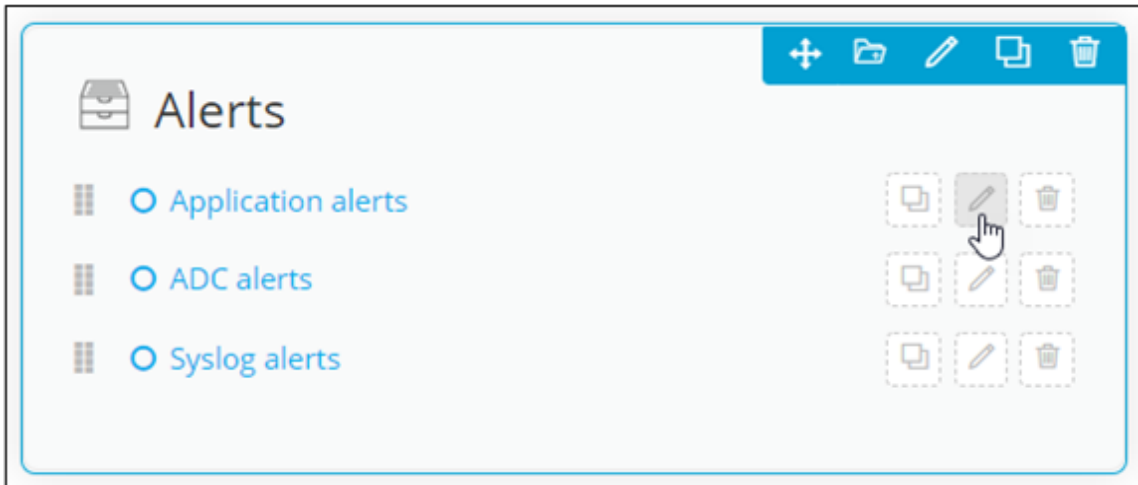
Field	Description
Widget Background	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Widget Description	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Description Text Color: Allows you to change the color of the label text. • Description Text Size: Allows you to select the size of the label text. • Description Text Underline: To underline the description text, select the Description Text Underline checkbox.
Icon Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Icon Color - Select the Icon Color from the available options. • Icon Background - Select the Icon Background from the available options. • Icon Background Color - Select the Icon Background Color from the available options.

2. To save your settings, click **Save**.
3. To restore the settings to default, click .

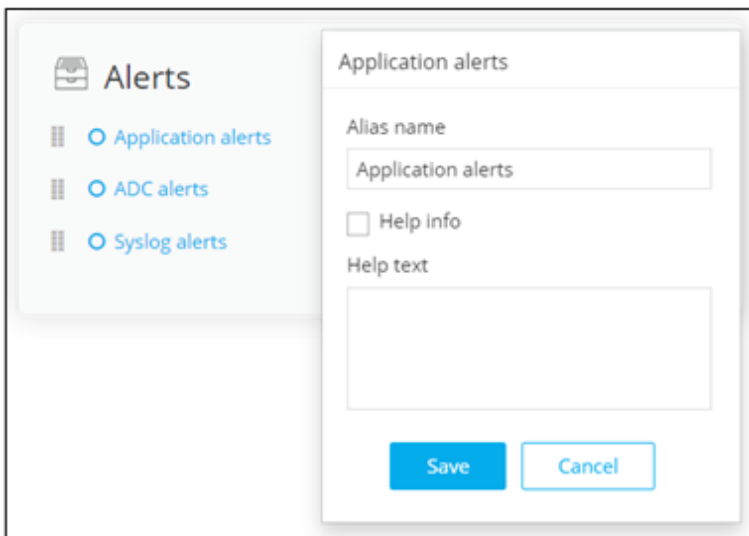
Editing and Deleting Quicklinks

You can edit individual quick links to change the name displayed on the widget, add help text to quick links, and also delete quick links from the widget.

1. To edit an internal or external Quick link click .

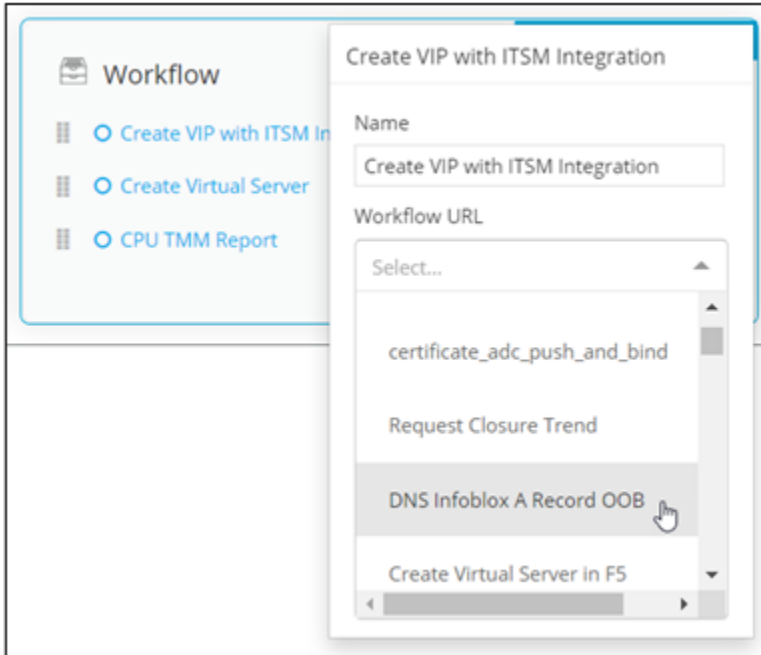


2. Enter the **Alias name** in the quick link pop-up window.

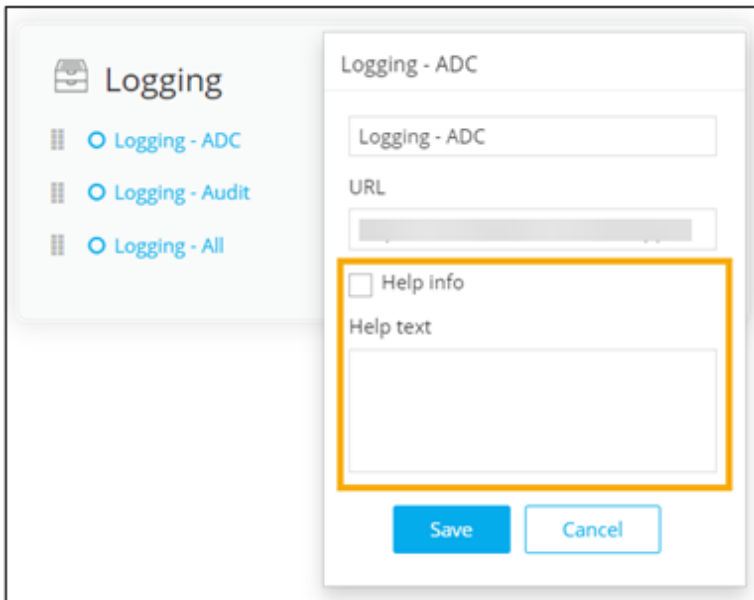


3. To edit the Workflow quick link, click .


4. In the workflow quick link pop-up window, edit the workflow name and select a different workflow URL from the dropdown list.

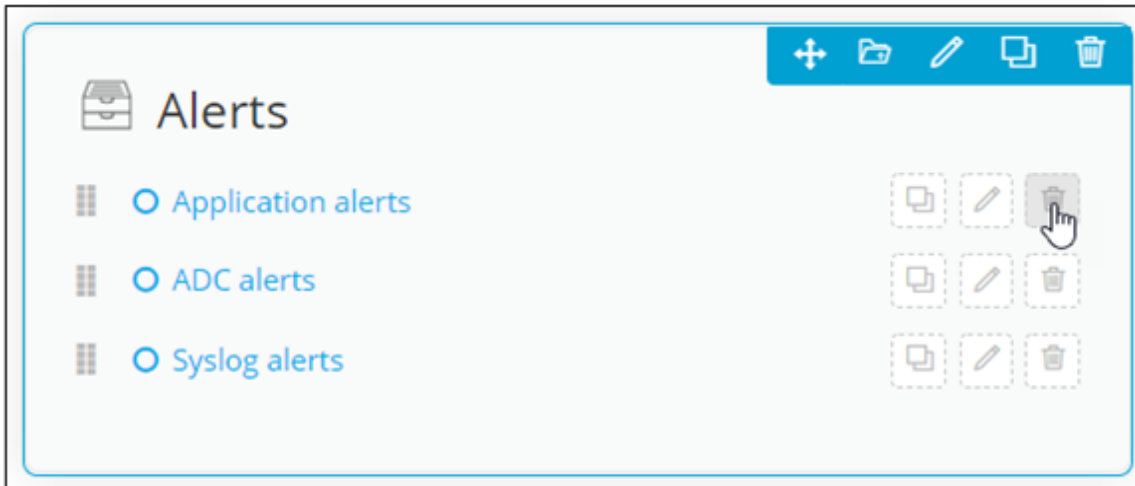


5. Add the text to be displayed in the **Help text** box.

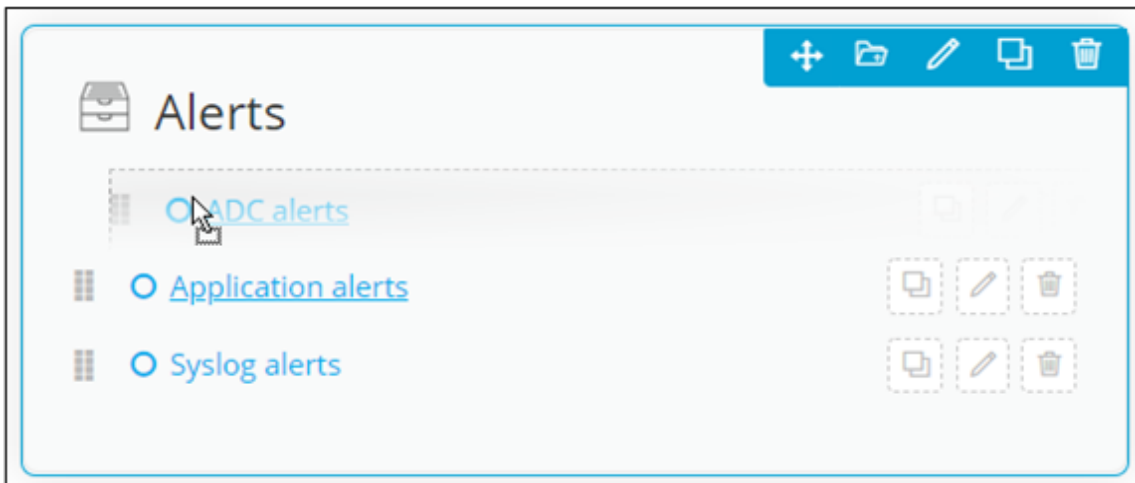



6. Click **Save**.

7. To delete a quick link, click  and click **Ok** in the **Confirmation** window.



8. To rearrange the order in which the quick links are displayed in the widget, hold and drag the quick link where required.



9. To make a copy of a quick link, click 

HTML

Self-service Pages module allows you to design customized HTML pages based on specific user needs.

- Create customized HTML page using HTML5 syntax
- Add third party web plugins
- Add own style components and interactive functionalities using CSS and JS
- Use Hooks to design custom HTML pages

HTML master

Build
Reports
Workflow
Folders
Inventory

Device form

Device name

IP address

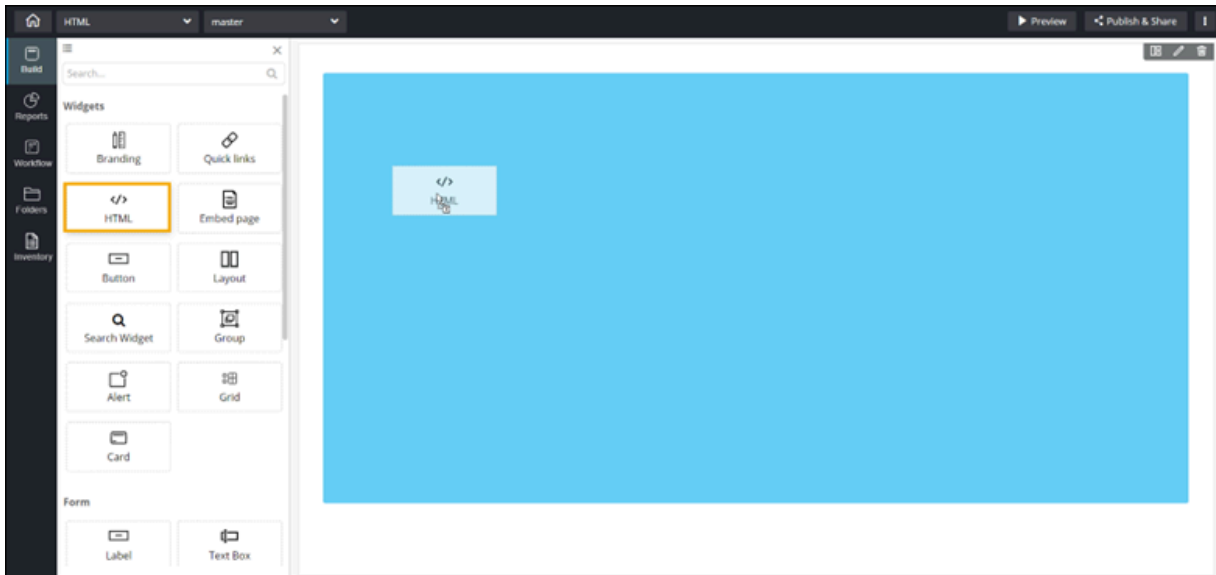
Port

Please select your protocol to communicate
 HTTP HTTPS FTP

Choose users to have access
 ADMIN Role 1 Role 2


To add an HTML page:

1. Drag and drop the HTML widget to any blue highlighted space in the build area.



2. To configure HTML widget **Properties**, click [here](#).
 3. To configure HTML widget **Styles**, click [here](#).
- [Configuring HTML Widget - Properties](#)
 - [Creating custom HTML pages using plugins](#)
 - [Creating custom HTML pages using sample HTML script](#)
 - [Creating custom HTML pages using Hook Inventory](#)
 - [Configuring HTML Widget - Styles](#)

Configuring HTML Widget - Properties

To configure/edit the HTML widget, hover your mouse over the widget and click .



The **Html widget** pop-up window opens with the **Properties** tab open by default. You can now create HTML pages using:

- Third-party Plugins
- Prebuilt Samples
- Hooks

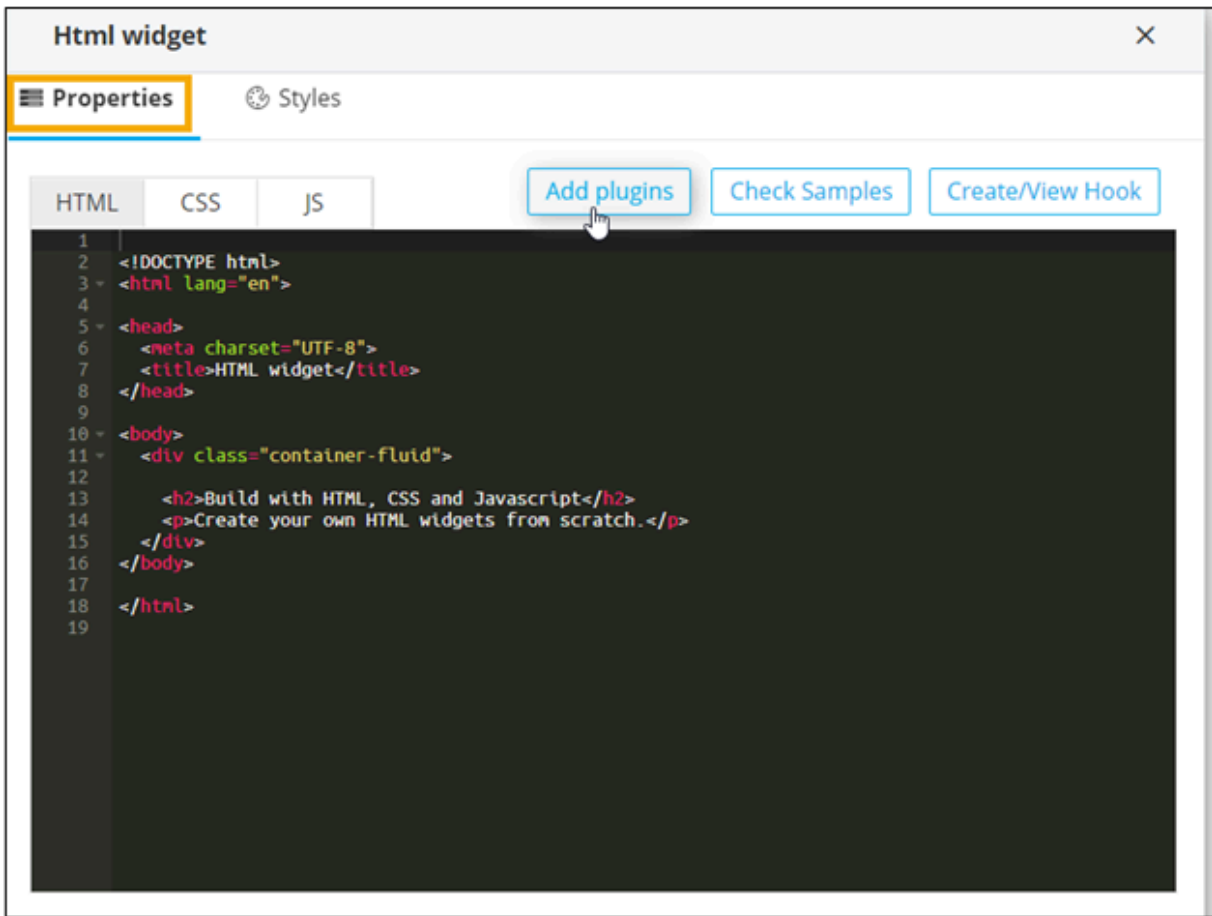
Creating custom HTML pages using plugins

You have the option of adding third party web plugins to the HTML widget. The following plugins are supported natively:

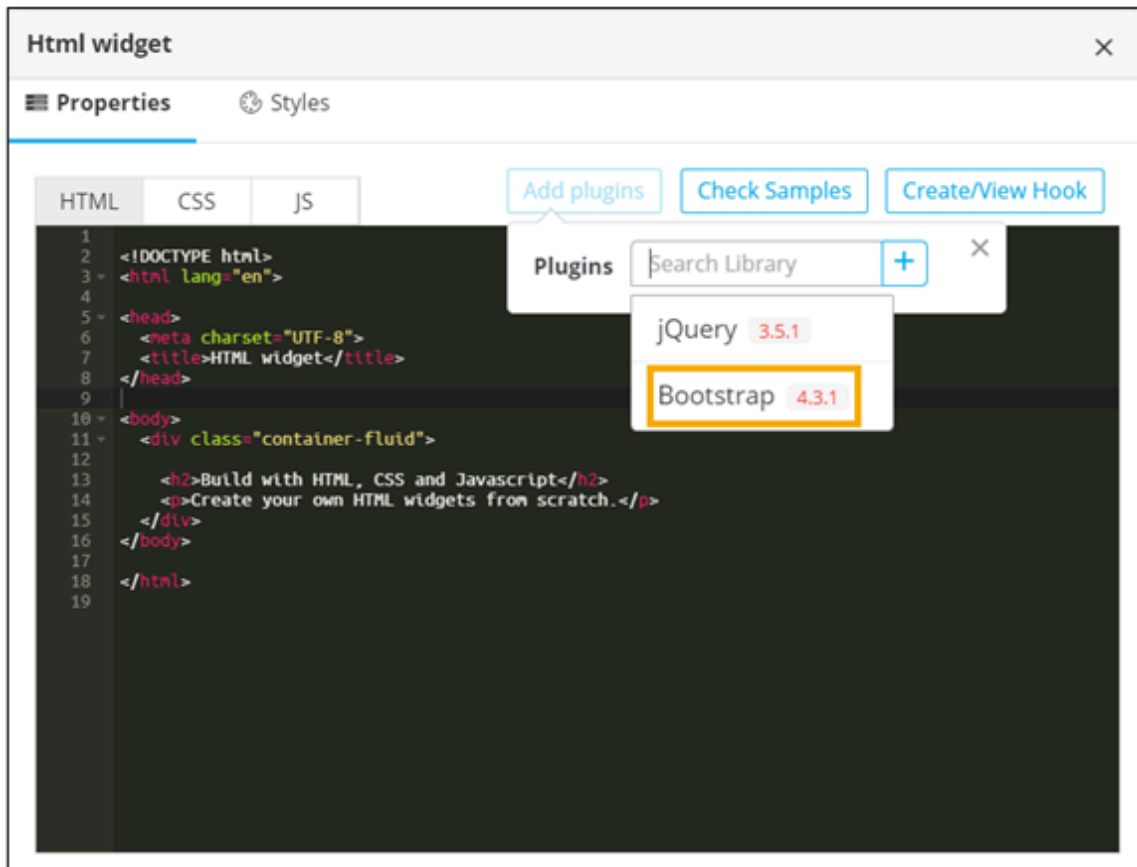
- jQuery
- Bootstrap


To add plugins to your HTML page:

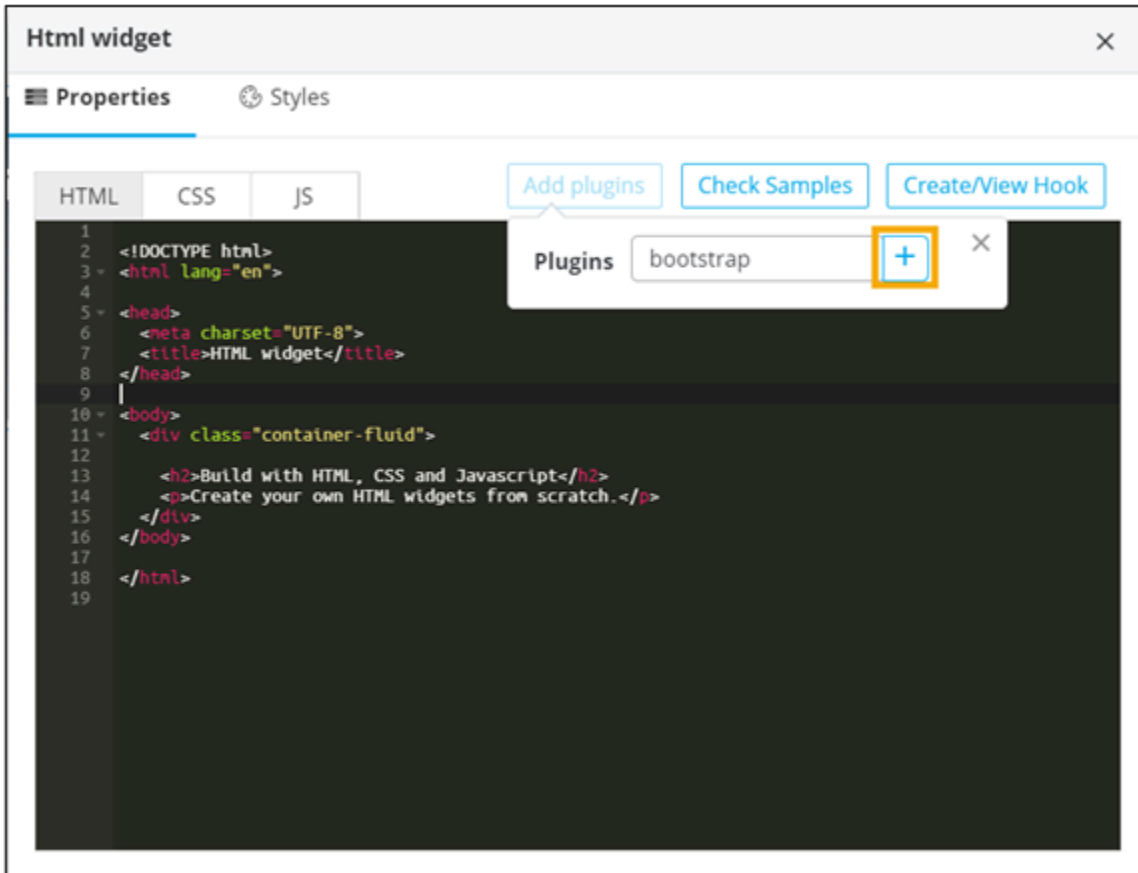
1. In the **HTML widget** window, under **Properties**, click **Add plugins**.



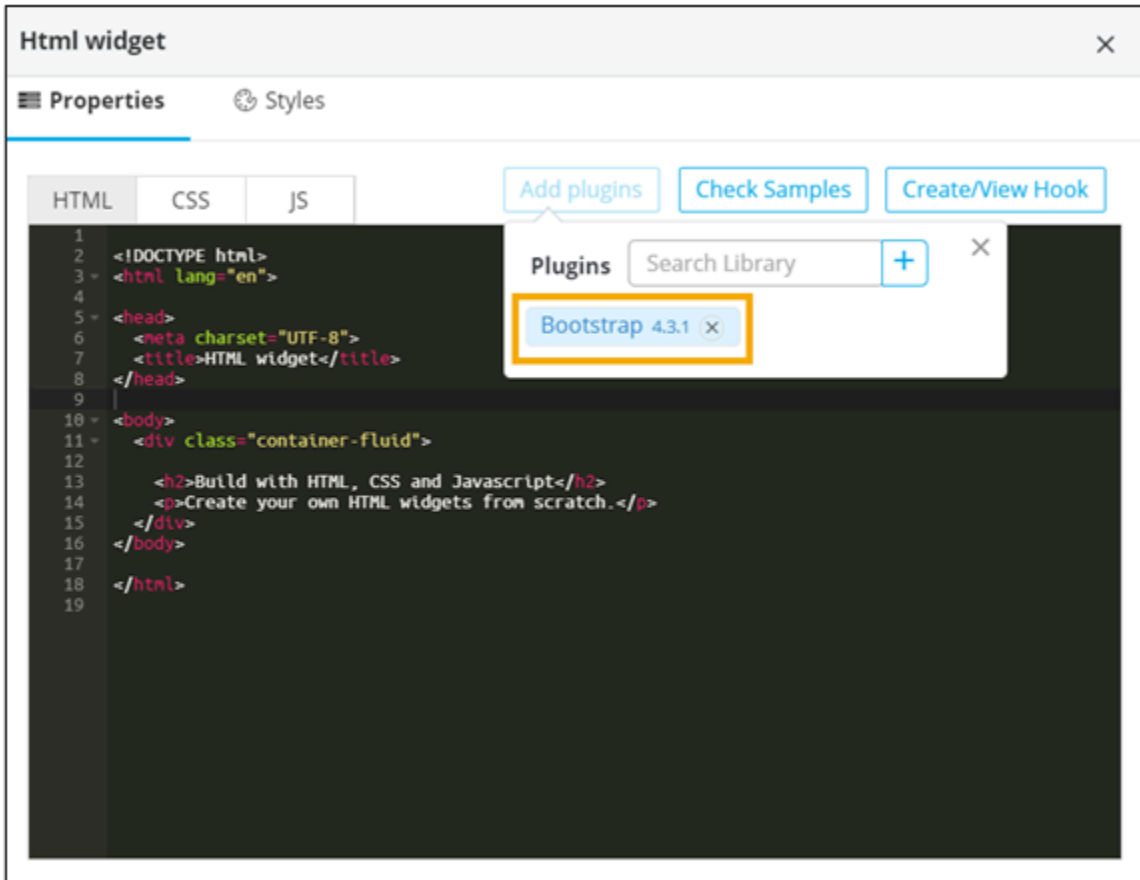
2. Select the library from the available options. For example, Bootstrap.



3. To add the selected plugin, click .



4. To see the available design templates, click **Bootstrap**.



The Bootstrap library opens in a new tab. You can customize any of their available templates for your HTML page.

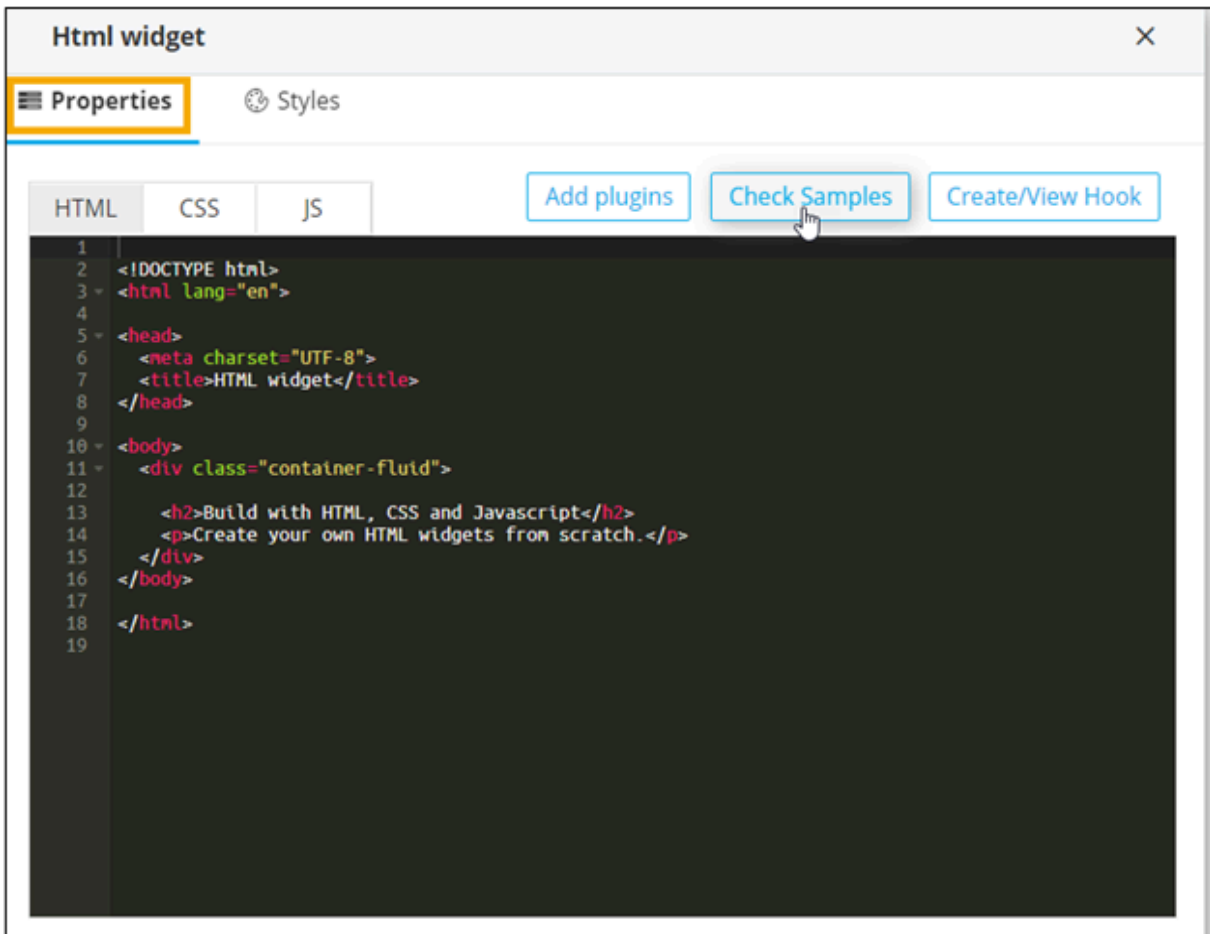
5. To save your selection, click **Save**.

Creating custom HTML pages using sample HTML script

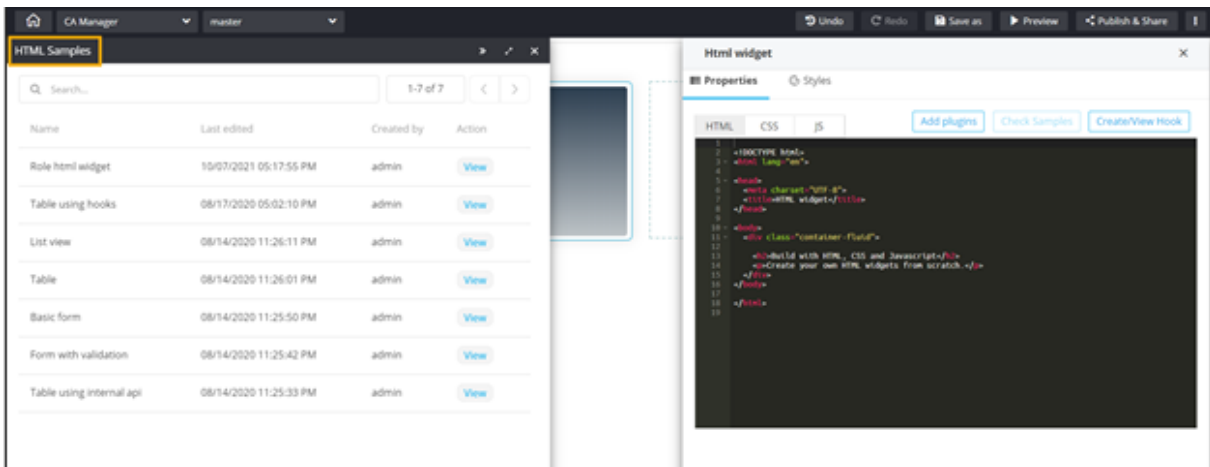
You can also create an HTML widget in your Page using prebuilt HTML scripts provided within the Page Builder.

To create a HTML page using sample script:

1. In the **HTML widget** window, click **Check Samples**.

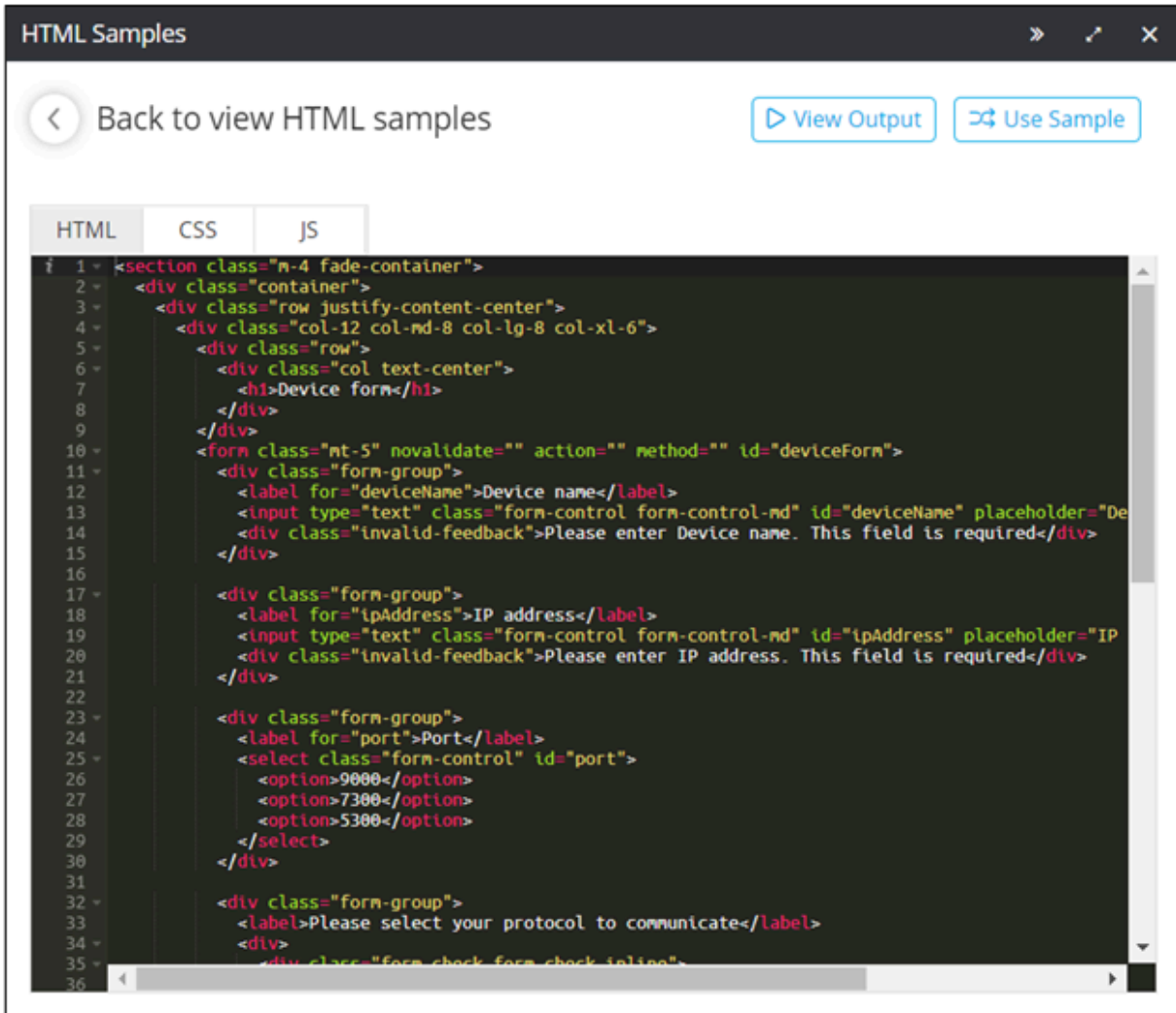


A list of **HTML Samples** is displayed on the left side of the screen.



2. To see the details of a sample script, in the **HTML Samples** window, click **View** next to the sample script you wish to view. For example, Basic form.

The details of the sample script as displayed in the same window.

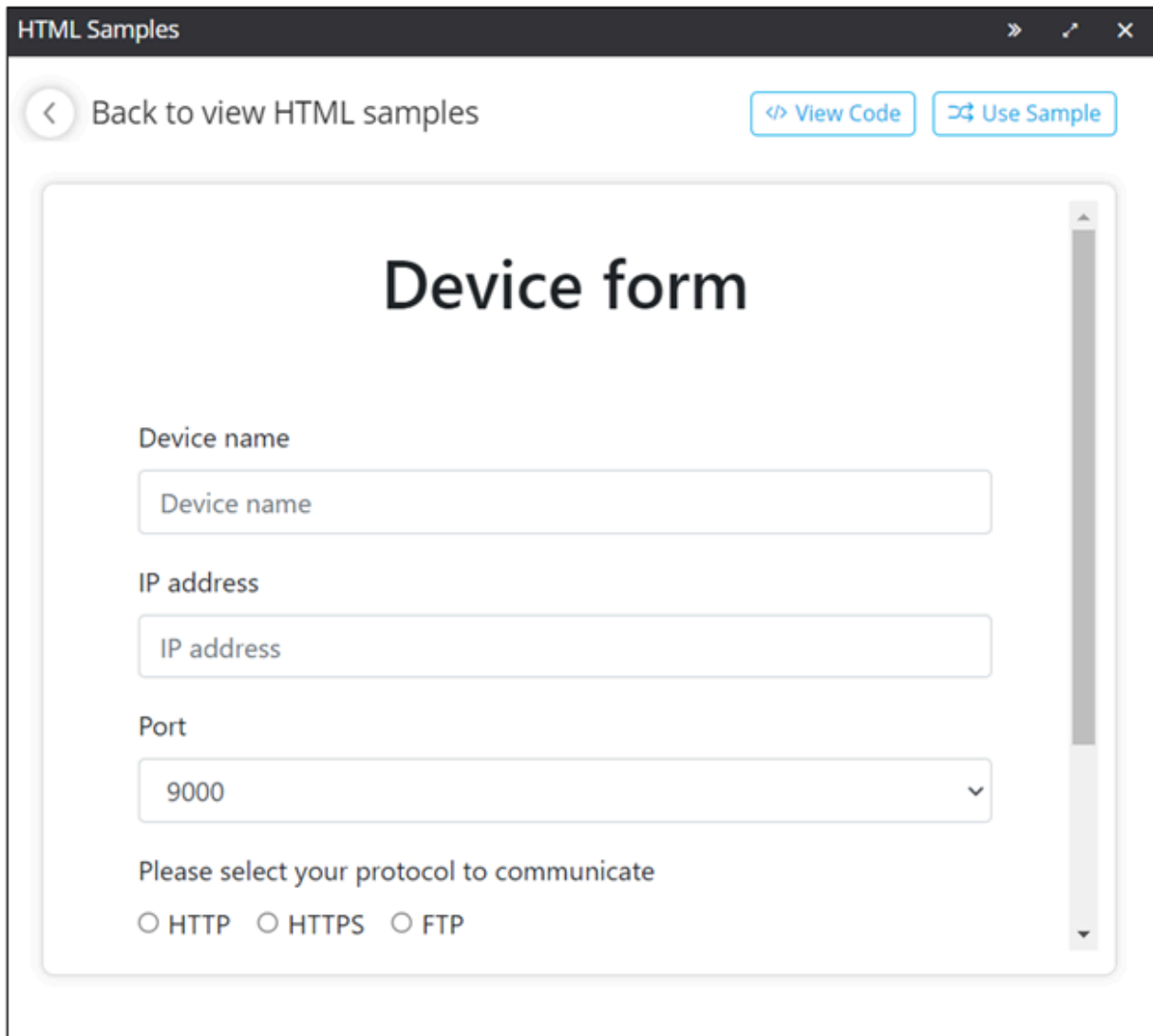


The screenshot shows a window titled "HTML Samples" with a dark-themed code editor. At the top left, there is a back arrow and the text "Back to view HTML samples". At the top right, there are two buttons: "View Output" and "Use Sample". Below the buttons are three tabs: "HTML", "CSS", and "JS", with "HTML" selected. The code editor displays the following HTML code:

```
1 <section class="m-4 fade-container">
2 <div class="container">
3 <div class="row justify-content-center">
4 <div class="col-12 col-md-8 col-lg-8 col-xl-6">
5 <div class="row">
6 <div class="col text-center">
7 <h1>Device form</h1>
8 </div>
9 </div>
10 <form class="mt-5 novalidate="" action="" method="" id="deviceForm">
11 <div class="form-group">
12 <label for="deviceName">Device name</label>
13 <input type="text" class="form-control form-control-md" id="deviceName" placeholder="De
14 <div class="invalid-feedback">Please enter Device name. This field is required</div>
15 </div>
16
17 <div class="form-group">
18 <label for="ipAddress">IP address</label>
19 <input type="text" class="form-control form-control-md" id="ipAddress" placeholder="IP
20 <div class="invalid-feedback">Please enter IP address. This field is required</div>
21 </div>
22
23 <div class="form-group">
24 <label for="port">Port</label>
25 <select class="form-control" id="port">
26 <option>9000</option>
27 <option>7300</option>
28 <option>5300</option>
29 </select>
30 </div>
31
32 <div class="form-group">
33 <label>Please select your protocol to communicate</label>
34 <div>
35 <div class="form-check form-check-inline">
36
```

3. To see a preview of the selected HTML page, click **View Output**.

The selected HTML page is displayed in the **HTML Samples** window.

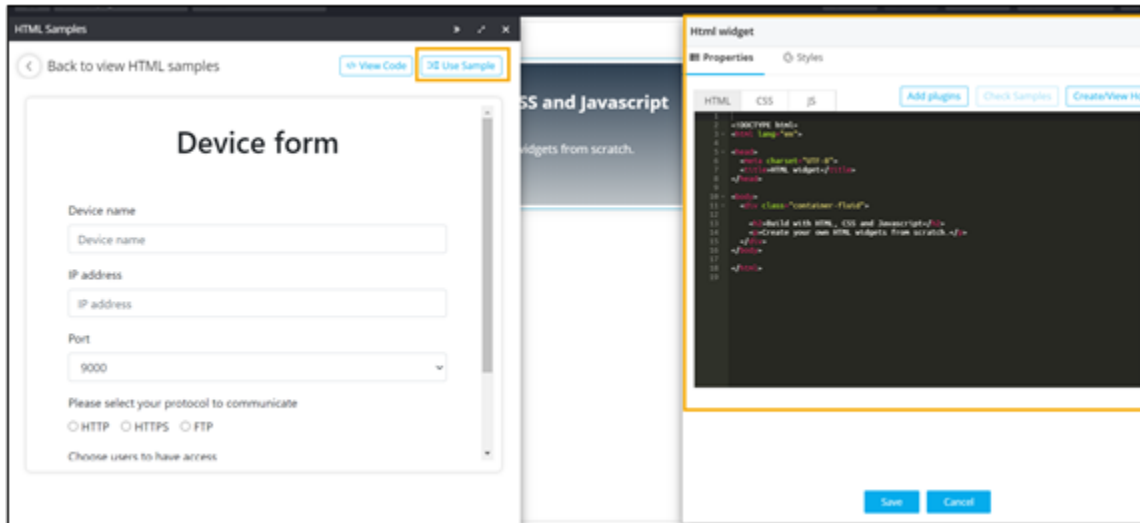


The screenshot shows a browser window titled "HTML Samples" with a dark header. Below the header, there is a navigation bar with a back arrow and the text "Back to view HTML samples". To the right of this are two buttons: "View Code" and "Use Sample". The main content area is titled "Device form" and contains the following elements:

- A text input field labeled "Device name" with the placeholder text "Device name".
- A text input field labeled "IP address" with the placeholder text "IP address".
- A dropdown menu labeled "Port" with the value "9000" and a downward arrow.
- A section titled "Please select your protocol to communicate" with three radio buttons: "HTTP", "HTTPS", and "FTP".

4. To use this script to build the HTML page, click **Use Sample**.

The selected sample script is displayed in the **Html widget** window.

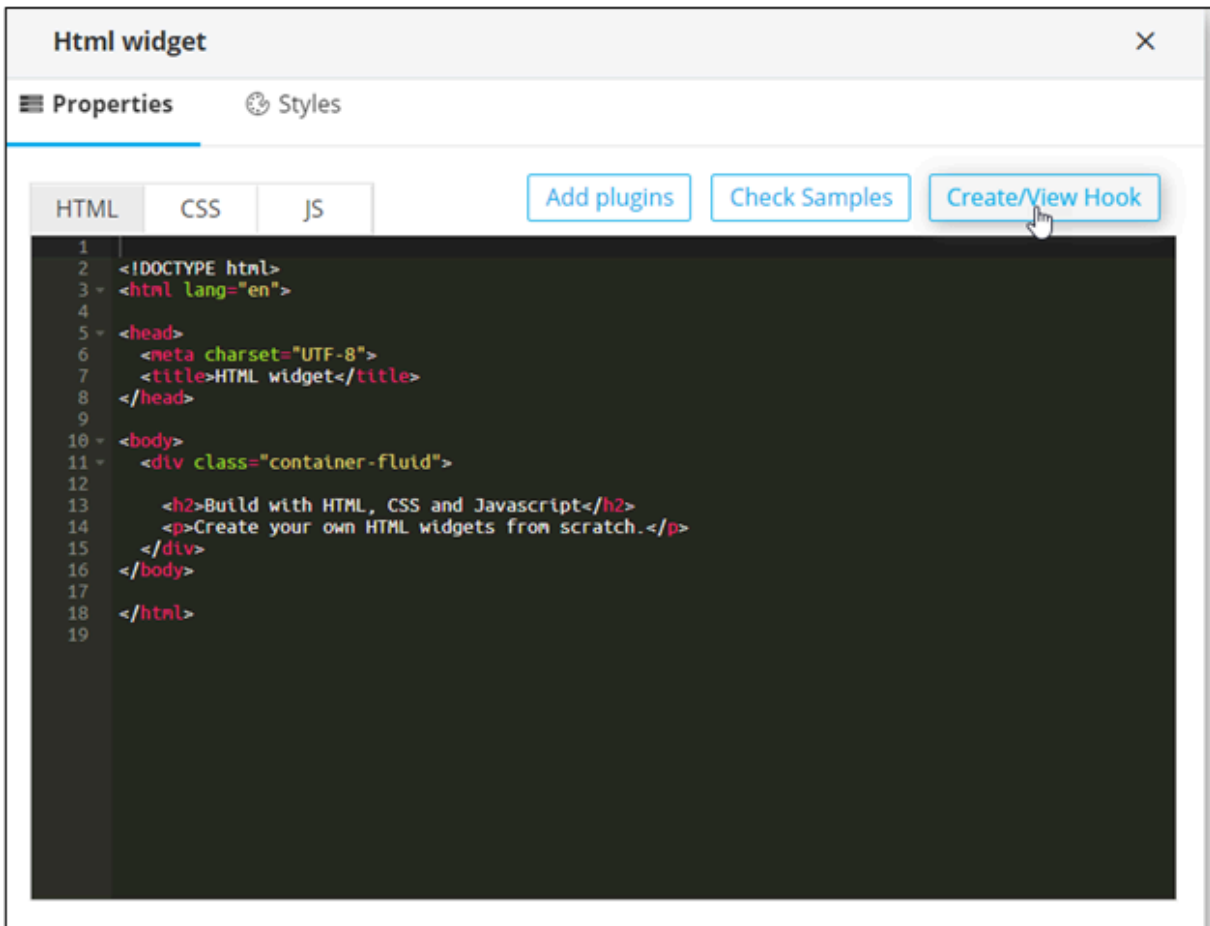


Creating custom HTML pages using Hook Inventory

You can fetch information from a data source using Hooks. There is a provision to select pre existing hooks or create new hooks in the Hooks Inventory and use them to build customized HTML pages.

To use Hooks for building an HTML page:

1. In the **Html widget** window, under **Properties**, click **Create/View Hook**.



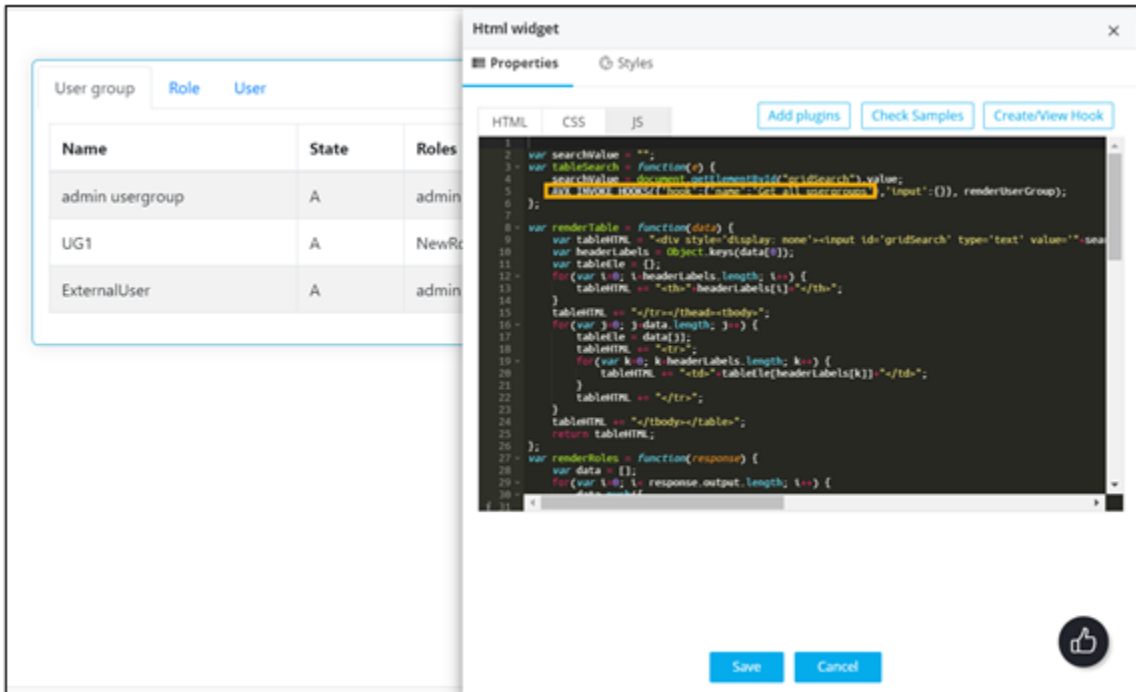
The Hooks Inventory opens in a new tab.



Note: For more information on Hooks, refer to the [Visual Workflow User Guide](#).

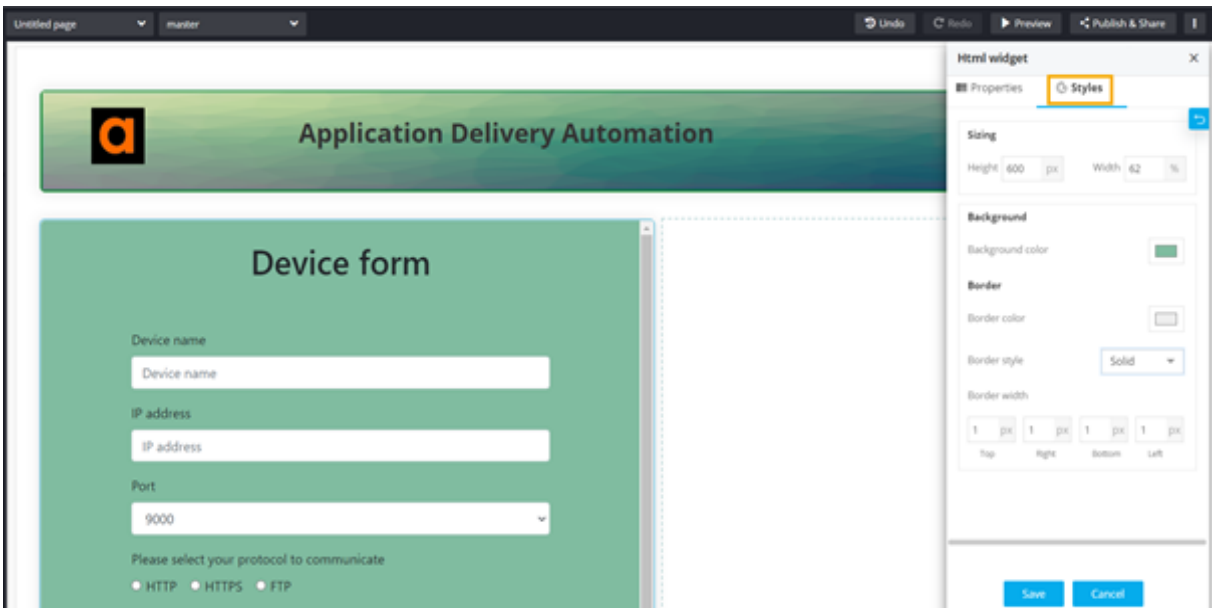
2. To build your customized HTML page, you can either use a preexisting hook from the Hook Inventory or create a new hook.

For example, Table using hooks created using **Get all usergroups** hook.




Configuring HTML Widget - Styles

1. For more options to customize the HTML widget, in the **HTML widget** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

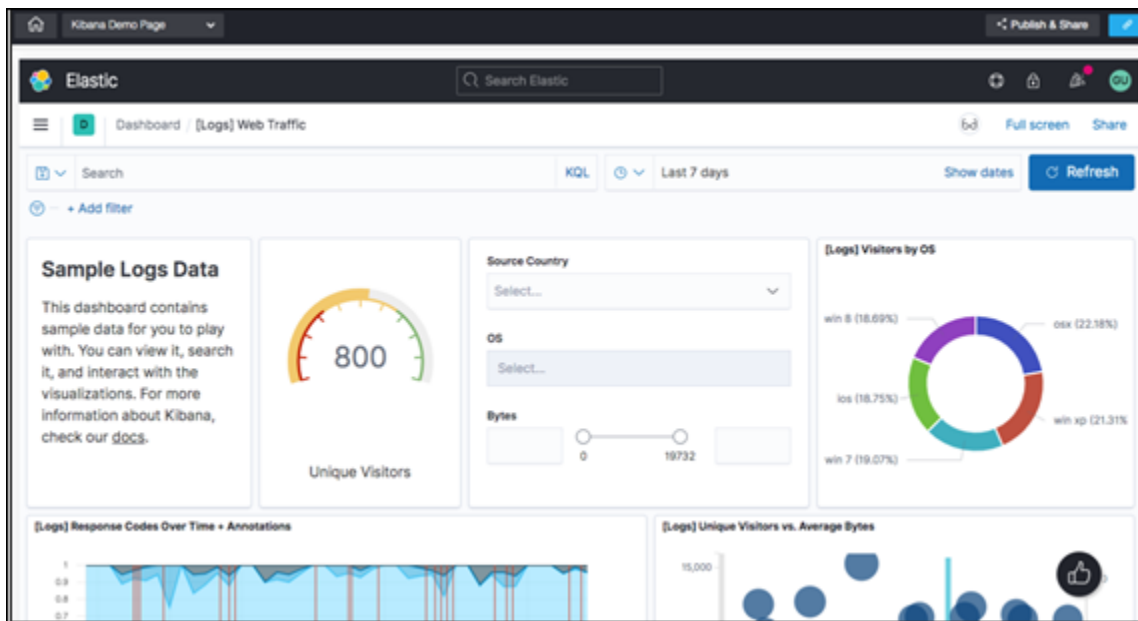
Field	Description
Sizing	Allows you to increase/decrease font Size of the field name.
Background	Allows you to define the Background color for the HTML widget.
Border	Allows you to define the <ul style="list-style-type: none"> • Border color - Select the color of the HTML widget's border. • Border style - Select the border style for the HTML widget from the options available in the dropdown. • Border width - Select the thickness of the HTML widget's border.

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

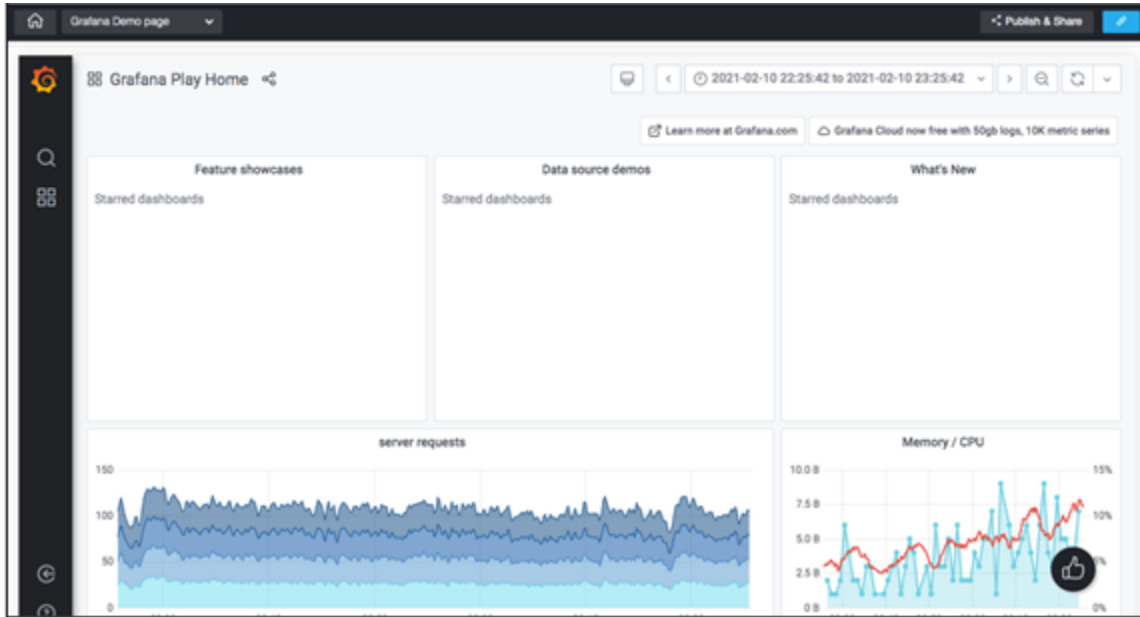
Embed page

Self-service Pages module allows you to embed an entire webpage inside a single widget on your page.

For example, embed a Kibana visualization dashboard.

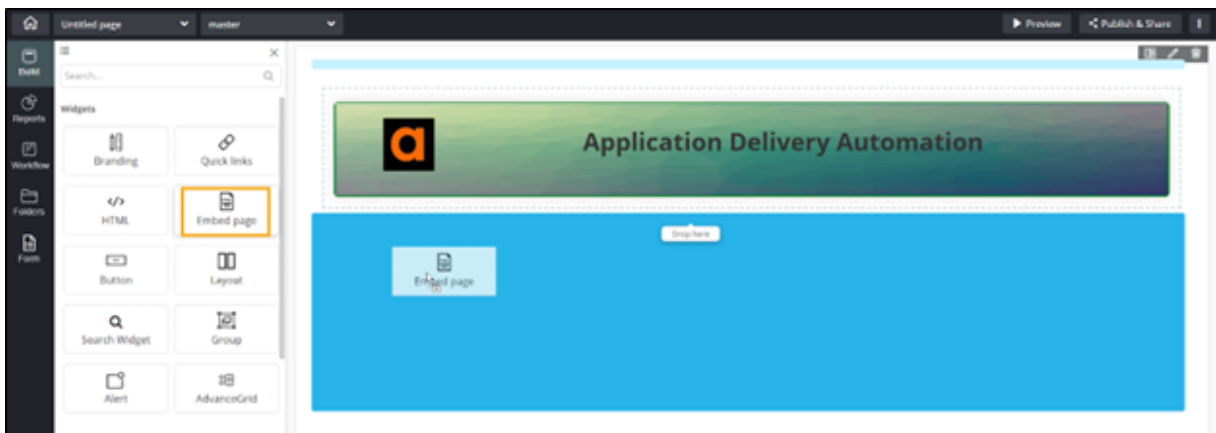


For example, embed a Grafana visualization dashboard.



To embed a page:

1. Drag and drop the **Embed page** component to any blue highlighted space on the page.




2. To configure Embed widget **Properties**, click [here](#).
3. To configure Embed widget **Styles**, click [here](#).

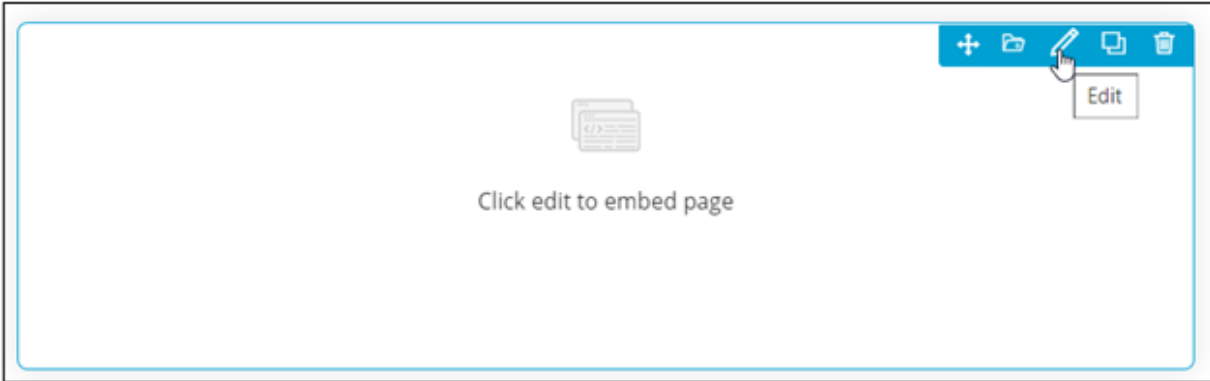
- [Embedding a page - Properties](#)
- [Embedding an Internal page](#)
- [Embedding an External Page](#)
- [Embedding a Page - Styles](#)

Embedding a page - Properties

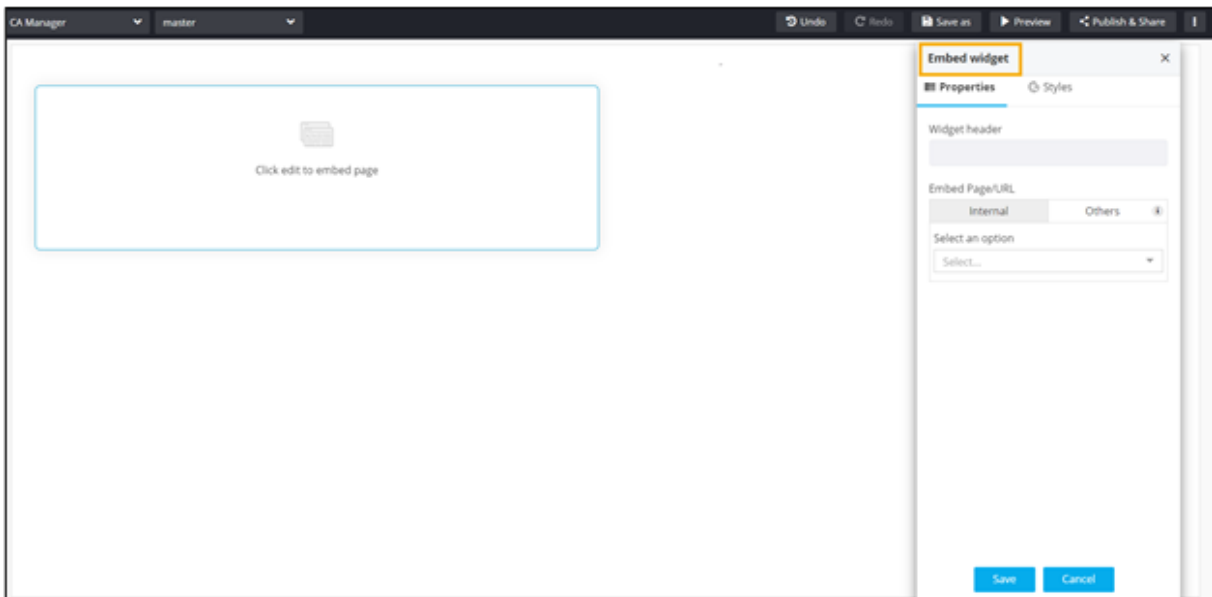
You can either choose from a predefined list of internal pages or embed an external page into the widget. Cross domain data exchange must be possible to embed an external page into your page.

To embed a page:

1. Hover your mouse over the widget and click .



The Embed widget pop-up window opens with the **Properties** tab open by default.



2. In the **Embed widget** window, under **Properties**, enter or select the required field information.

The following table describes the various fields in this tab:

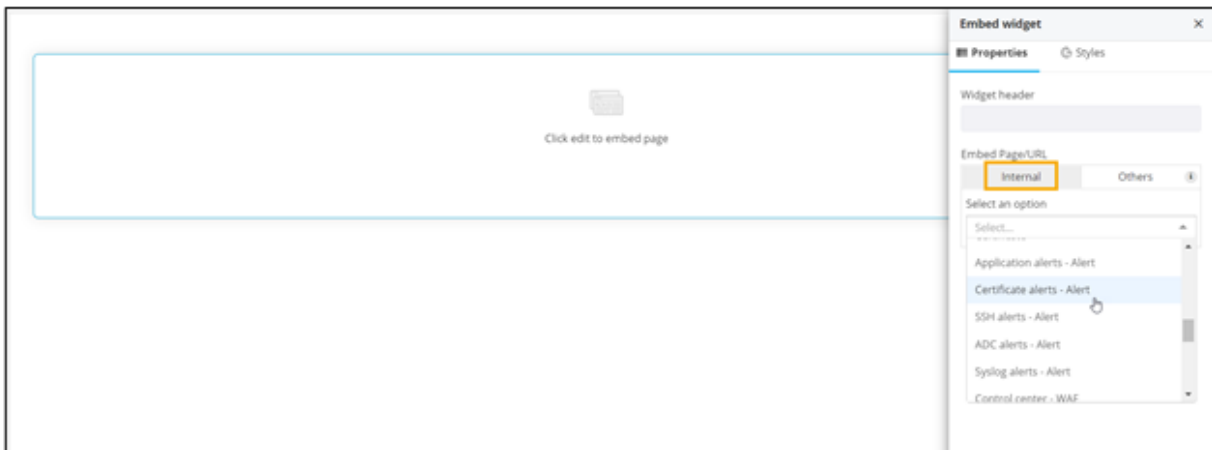
Field	Description
Widget Header	Provide a suitable widget header

Field	Description
Embed Page/URL	Users have two options for embedding a page in the widget: <ul style="list-style-type: none"> • Internal: Add an internal link from within AppViewX pages. • External: Users can embed cross origin enabled pages here.

3. Click **Save**.

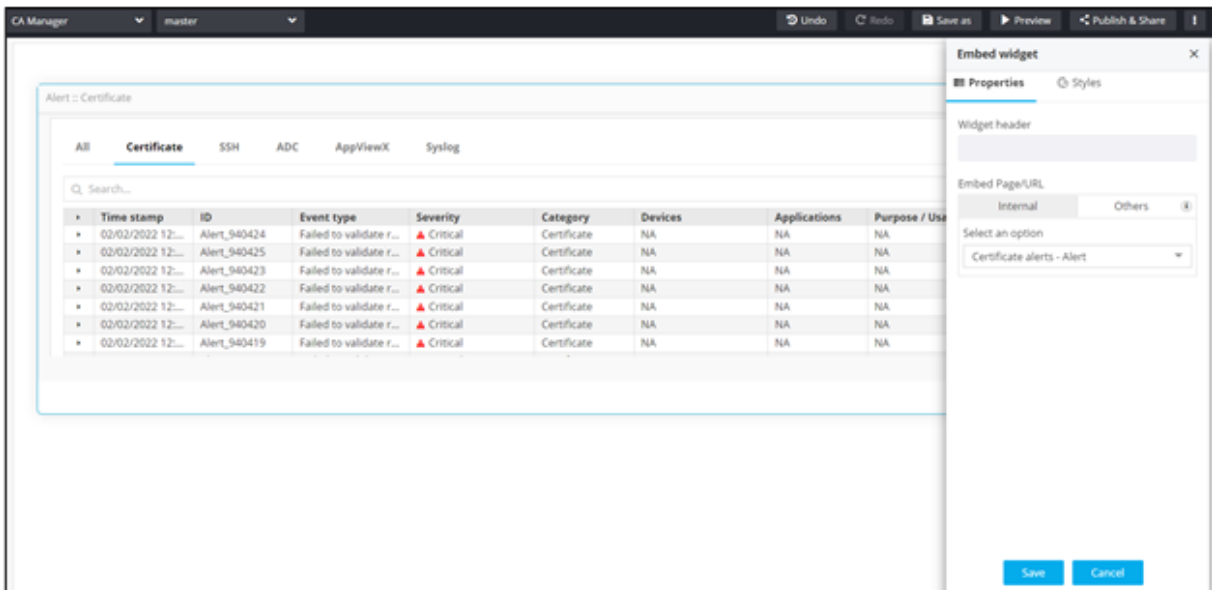
Embedding an Internal page

1. In the Embed widget window, under **Internal**, select an option from the drop down list. For example, Dashboard - ADC.



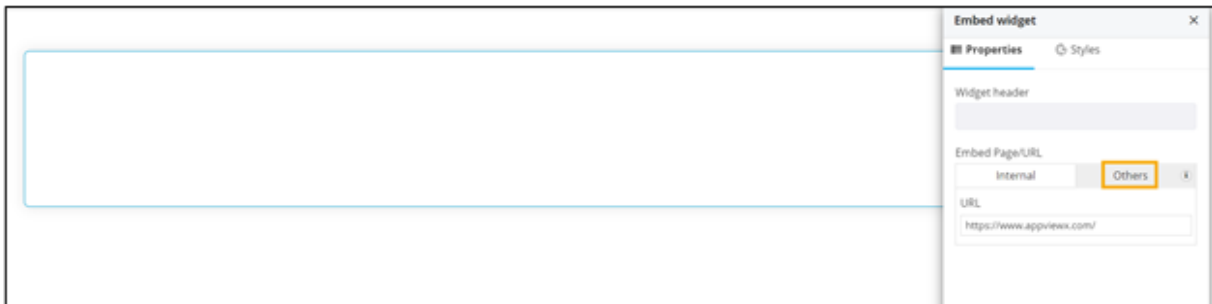
2. To embed this page, click **Save**.

The selected page is embedded and displayed on your Page.



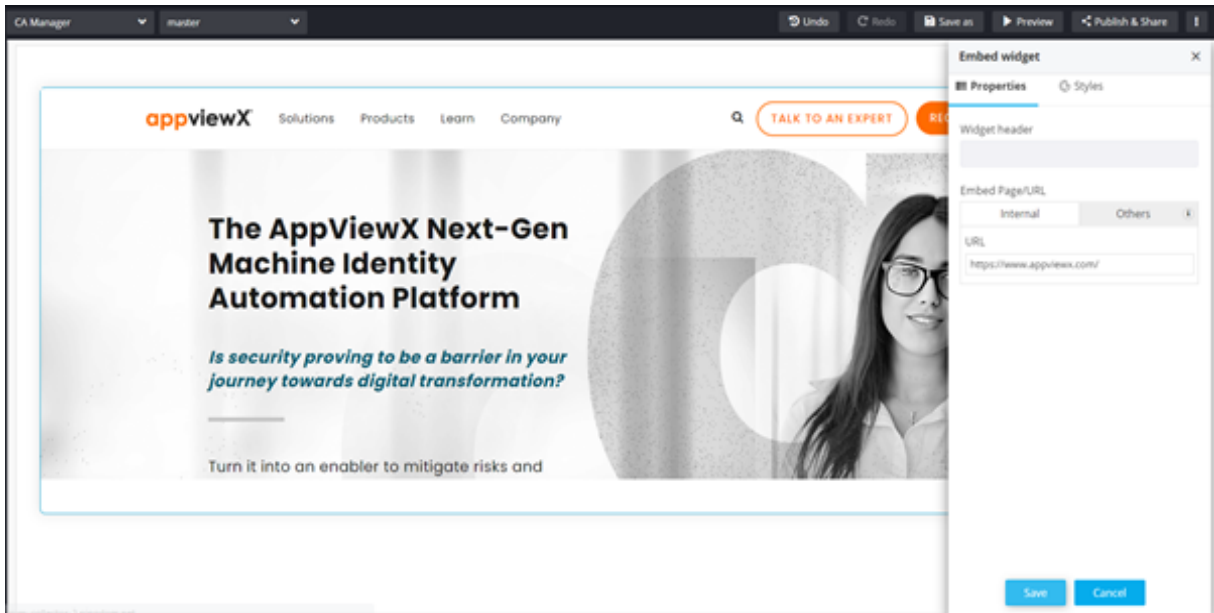
Embedding an External Page

1. In the **Embed widget** window, under **Properties**, click **Others**.



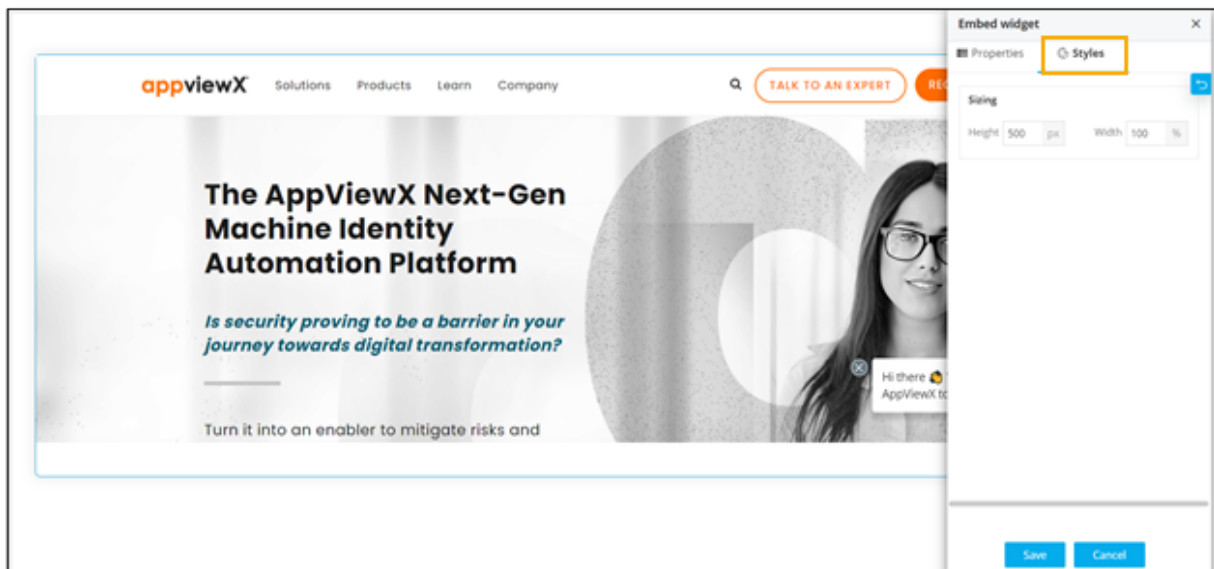
2. Enter the URL of the page that is to be embedded.
3. To embed the page, click **Save**.


The page is embedded on your Page.



Embedding a Page - Styles

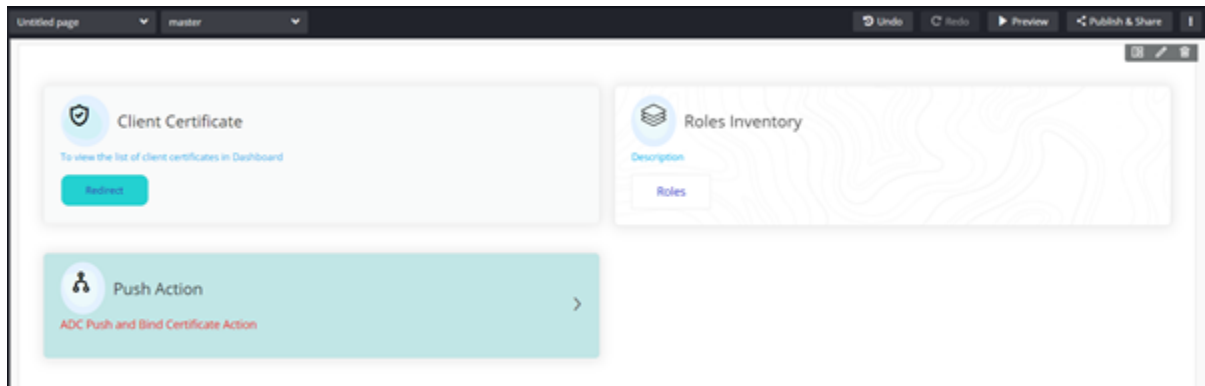
1. For more options to customize the **Embed widget**, in the **Embed widget** window, click **Styles**.



2. Under **Sizing**, you can increase/decrease the size of the widget.
3. To save your settings, click **Save**.
4. To restore the settings under **Styles** to default, click .

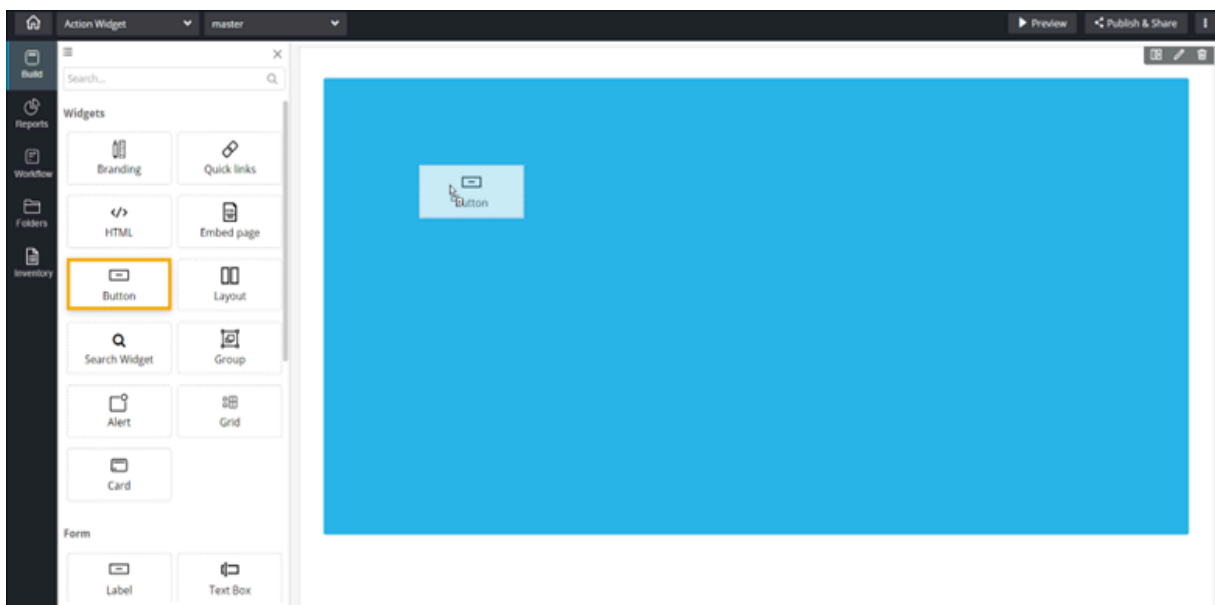
Button (Action Widget)

Self-service Pages module allows users to add buttons on your page to trigger specific “call to action”.



To add a button/action widget to your page:

1. Drag and drop the **Button** component to any blue highlighted space in the build area.



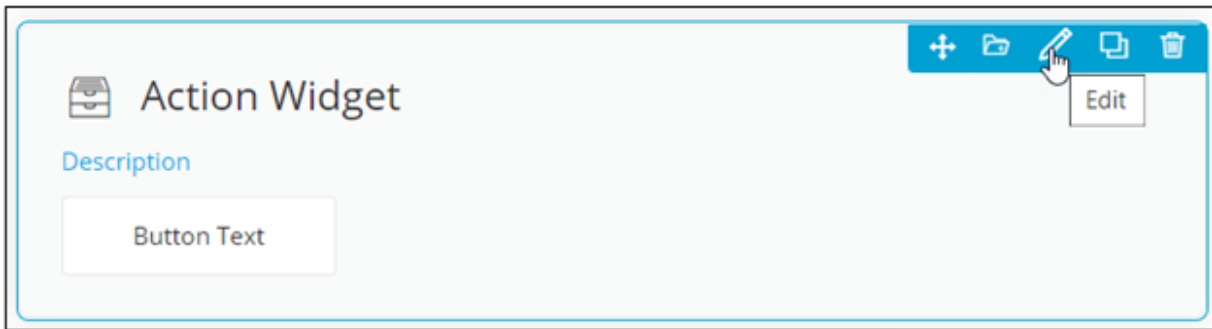
2. To configure the Action widget **Properties**, click [here](#).
3. To configure Action widget **Styles**, click [here](#).

- [Configuring the Button/Action Widget - Properties](#)
- [Adding an Internal Action Widget Link](#)
- [Adding an External Action Widget Link](#)

- Adding a Workflow Link to the Action Widget
- Configuring the Button/Action Widget - Styles

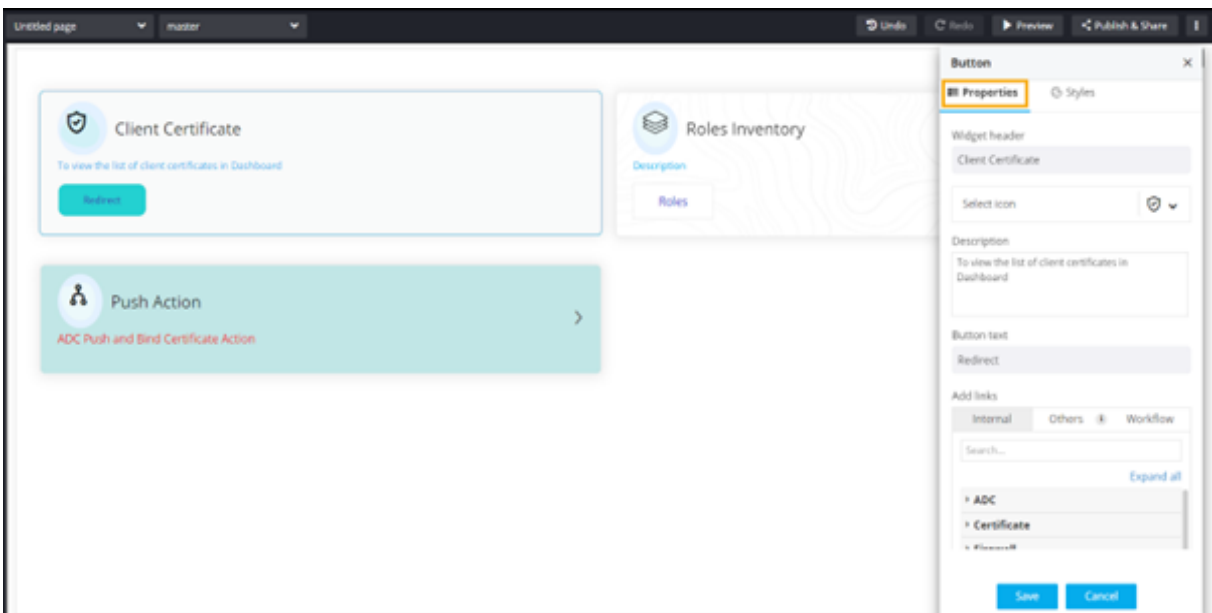
Configuring the Button/Action Widget - Properties

1. To configure the button/action widget, hover your mouse over the widget and click .



The **Button** pop-up window opens.

2. In the Button pop-up window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

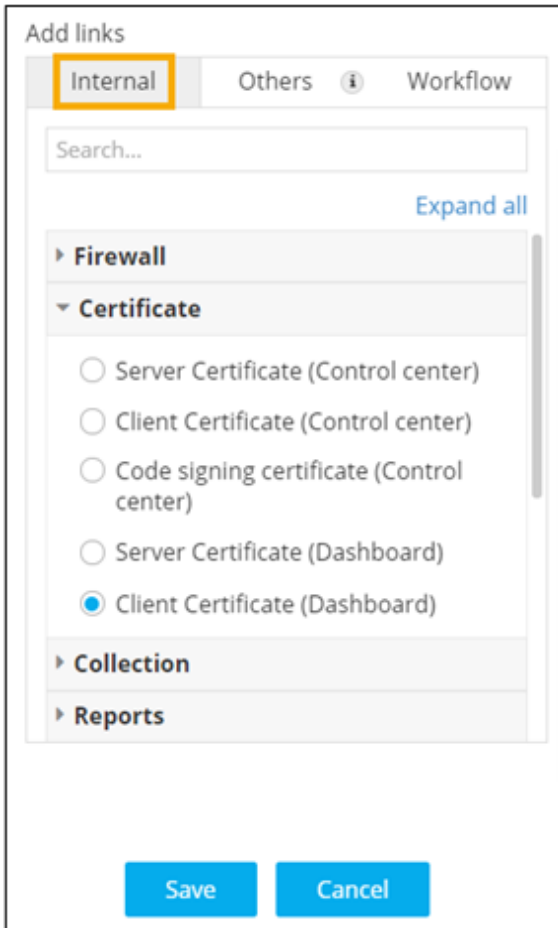
Field	Description
Widget Header	Allows you to enter the widget header name.

Field	Description
Select icon	Allows you to select the icon for the widget from the options available in the dropdown.
Description	Allows you to add a description for the action widget.
Button text	Allows you to add the text that is displayed on the button.
Add links	Allows you to add links to the action widget. The following options are available here: <ul style="list-style-type: none"> • Internal: Add an internal from within AppViewX pages. • Others: Add links to other pages within AppViewX or embed external cross origin enabled pages. • Workflow: Add a workflow link which redirects to the workflow execution page.

3. Click **Save**.

Adding an Internal Action Widget Link

1. To link an internal AppviewX page to the action widget, under **Add links**, click **Internal**.
2. Select the required internal link from the list.



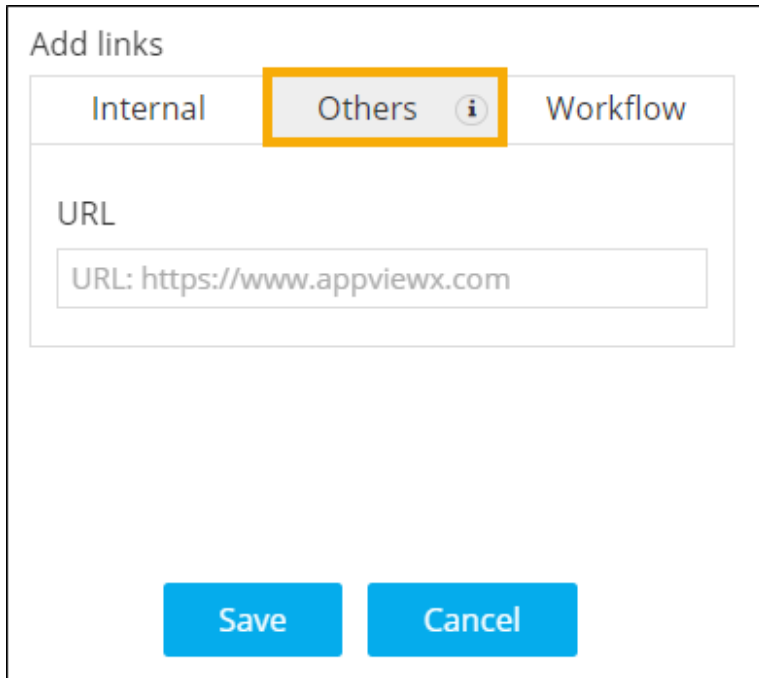
3. Click **Save**.

Clicking on the button will redirect to the selected link in a new tab.

4. For more options to customize the Action widget, click [here](#).

Adding an External Action Widget Link

1. To embed an external link or a cross origin enabled page URL into the Action widget, under **Add links**, click **Others**.
2. Enter the **Name** and **URL** for the link.



The image shows a dialog box titled "Add links". At the top, there are three tabs: "Internal", "Others", and "Workflow". The "Others" tab is currently selected and highlighted with a yellow border. Below the tabs, there is a section labeled "URL" with a text input field containing the text "URL: https://www.appviewx.com". At the bottom of the dialog, there are two blue buttons: "Save" and "Cancel".

3. Click **Save**.

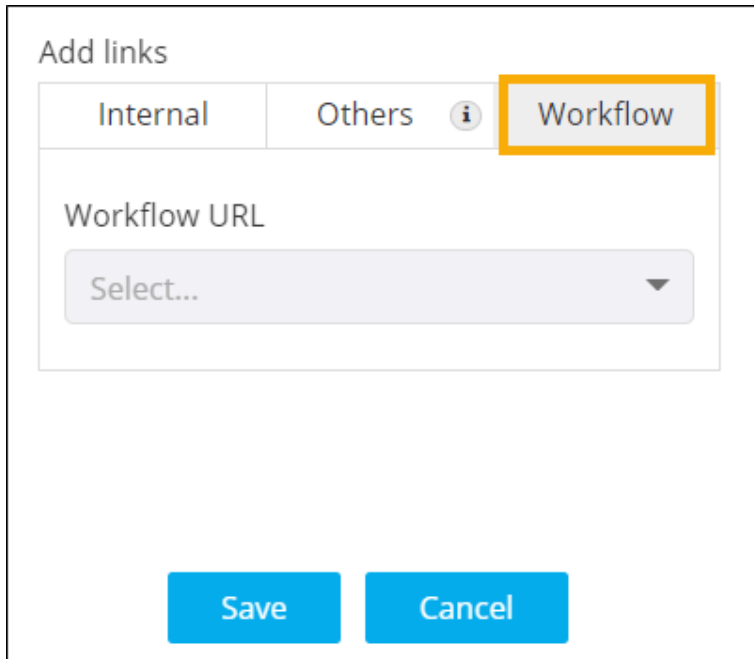
Clicking on the button will redirect to the page as per the configured URL.

4. For more options to customize Action widget, click [here](#).

Adding a Workflow Link to the Action Widget

1. To add a link to redirect to the Workflow Request execution page for the selected workflow, under **Add links**, click **Workflow**.

2. Enter the link **Name** and select the **Workflow URL** from the dropdown.

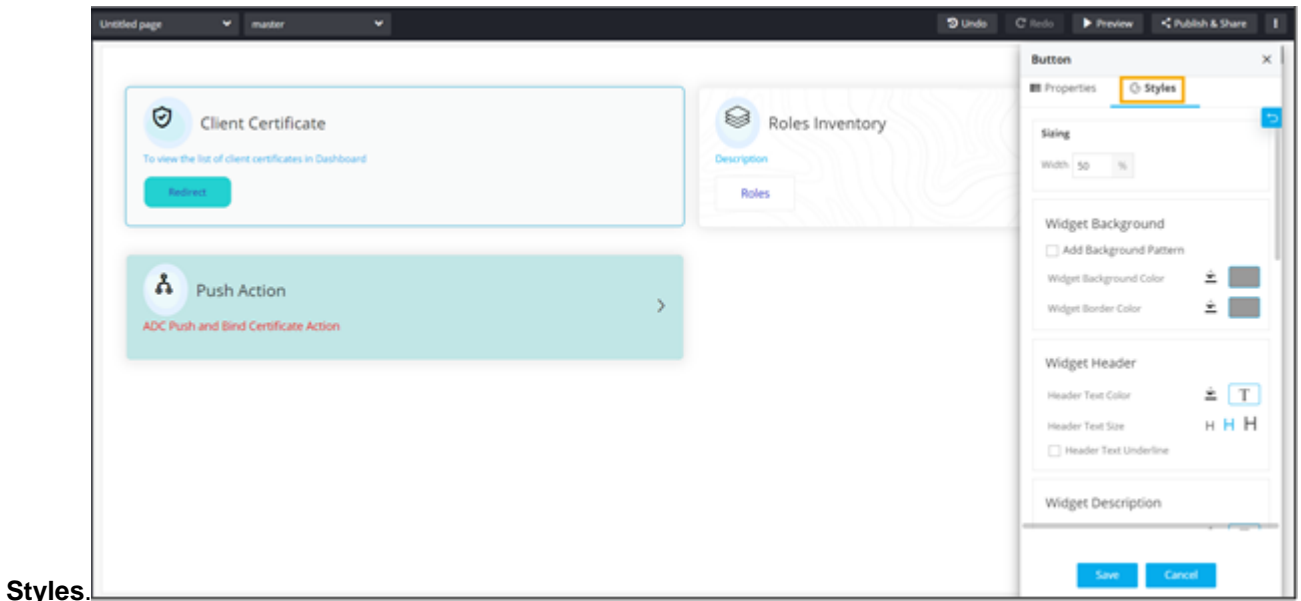


The image shows a dialog box titled "Add links". At the top, there are three tabs: "Internal", "Others" (with an information icon), and "Workflow". The "Workflow" tab is highlighted with an orange border. Below the tabs, the text "Workflow URL" is displayed above a dropdown menu that currently shows "Select...". At the bottom of the dialog, there are two blue buttons: "Save" and "Cancel".

3. Once you have selected the required workflow URL to the action widget, click **Save**.
Clicking on the button will redirect to the workflow request execution page for the configured workflow URL.
4. For more options to customize Action widget, click [here](#).

Configuring the Button/Action Widget - Styles

1. For more options to customize the action widget, in the **Button** window, click




Styles.

The following table describes the options available under the **Styles** tab:

Option	Description
Sizing	Allows you to increase/decrease the width of the action widget.
Widget Background	The following options are available here: <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	The following options are available here: <ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Widget Description	The following options are available here:

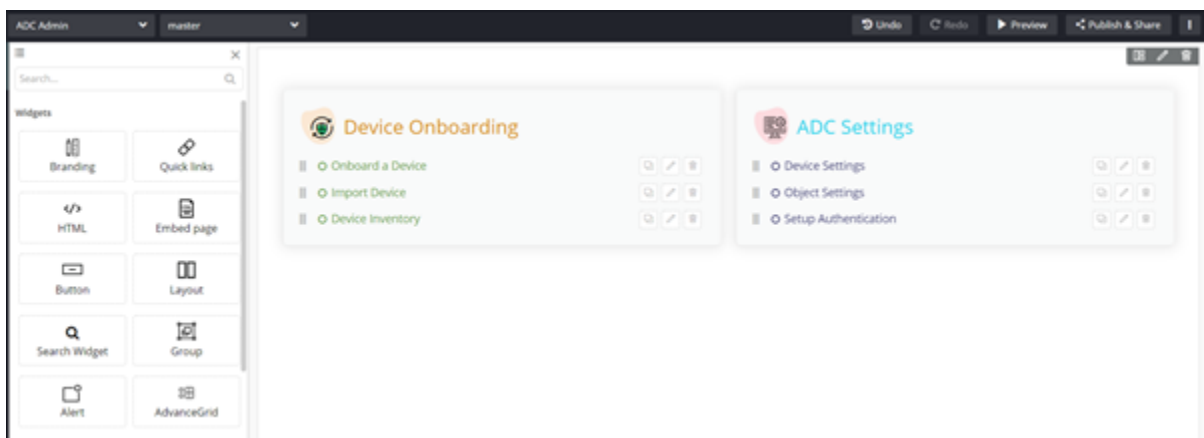
Option	Description
	<ul style="list-style-type: none"> • Description text Color: Allows you to change the color of the label text. • Description Text Size: Allows you to select the size of the label text. • Description Text Underline: To underline the description text, select the Description Text Underline checkbox.
Widget Type	<p>Allows you to enable/disable the button in the action widget.</p> <ul style="list-style-type: none"> • To enable the button select the Enable button checkbox. • To disable the button, deselect the Enable button checkbox. The action widget is displayed in a card view. Click on the widget to redirect to the page that is linked to the widget.
Button Background	<p>This feature is available only when the button is enabled. The following options are available here:</p> <ul style="list-style-type: none"> • Button Corners: Allows you to define the curvature of the button corners. The higher the number, the corners will be curved more. • Button Alignment: Allows you to define the placement of the button in the action widget - left, center, and right. • Widget Background Color: Allows you to select the background color of the widget from the color palette. • Widget Border Color: Allows you to select the color of the widget border from the color palette.
Button Text	<p>This feature is available only when the button is enabled. The following options are available here:</p> <ul style="list-style-type: none"> • Button Text Alignment: Allows you to define the placement of the button text inside the button - left, center, and right. • Button Text color: Allows you to select the button text color from the color palette. • Text Size: Allows you to select the size of the text displayed on the button.
Icon Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Icon Color - Select the Icon Color from the available options. • Icon Background - Select the Icon Background from the available options. • Icon Background Color - Select the Icon Background Color from the available options.

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Layout

Self-service Pages module allows you to customize your page layout.

- Separate a row into two columns at a time
- Insert more layouts within a layout for additional columns

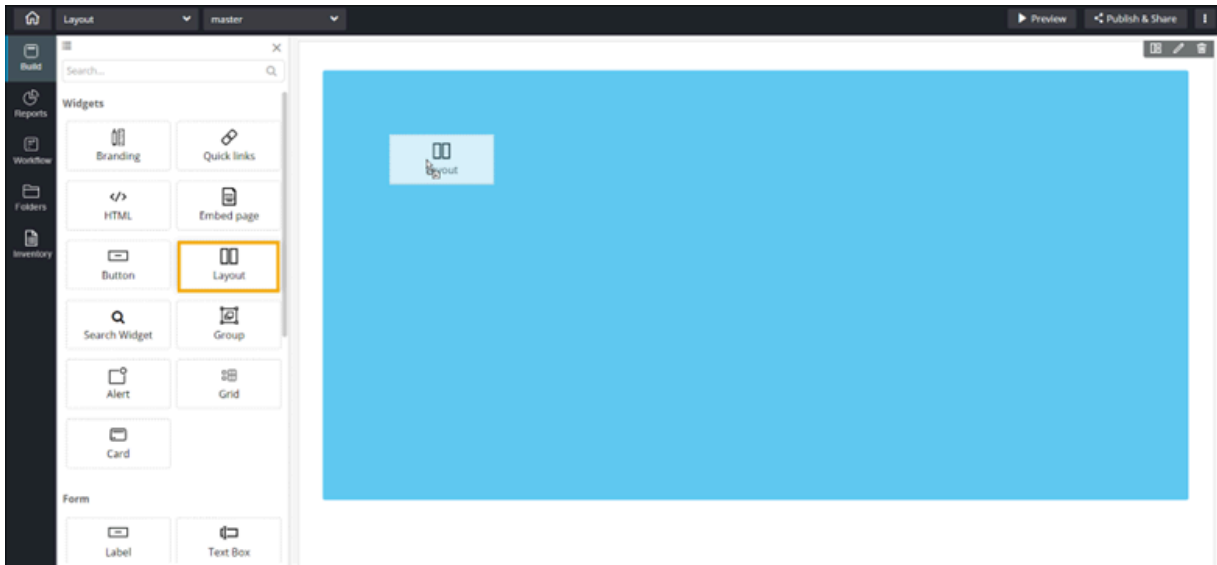


- [Adding a Layout component](#)
- [Configuring the Layout component](#)

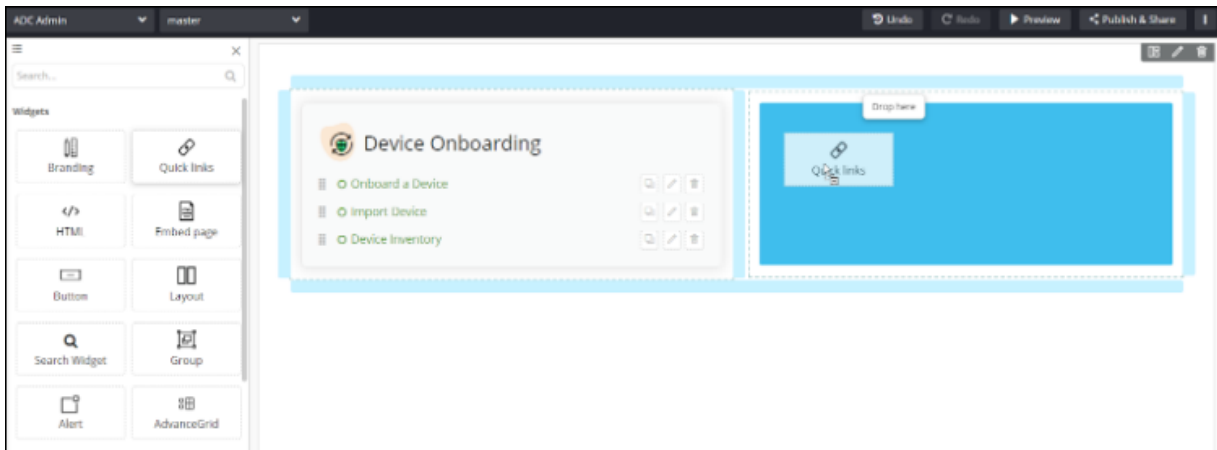
Adding a Layout component

To insert a Layout component to your page:


1. Drag and drop the **Layout** component to any blue highlighted space on the page.



2. Drag and drop one or more component(s) into this **Layout** widget as per your requirement.

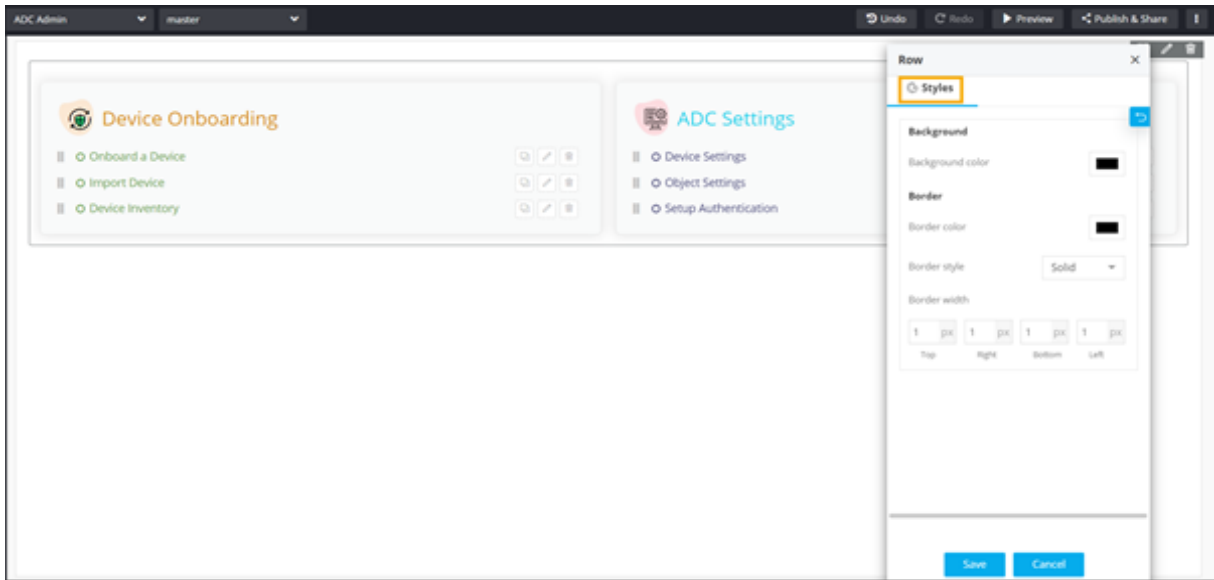


Configuring the Layout component

1. To configure/edit the Layout component, hover your mouse over the widget and click .



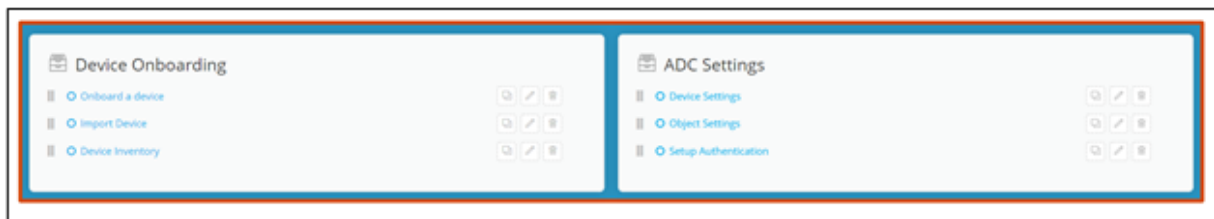
The **Row** pop-up window opens with the **Styles** tab.



The following table describes the options available under the **Styles** tab:

Option	Description
Background	Allows you to define the Background color for the Layout widget.
Border	Allows you to define the <ul style="list-style-type: none"> • Border color - Select the color of the layout border. • Border style - Select the border style for the layout section from the options available in the dropdown. • Border width - Select the thickness of the layout border.

2. To save your settings, click **Save**.

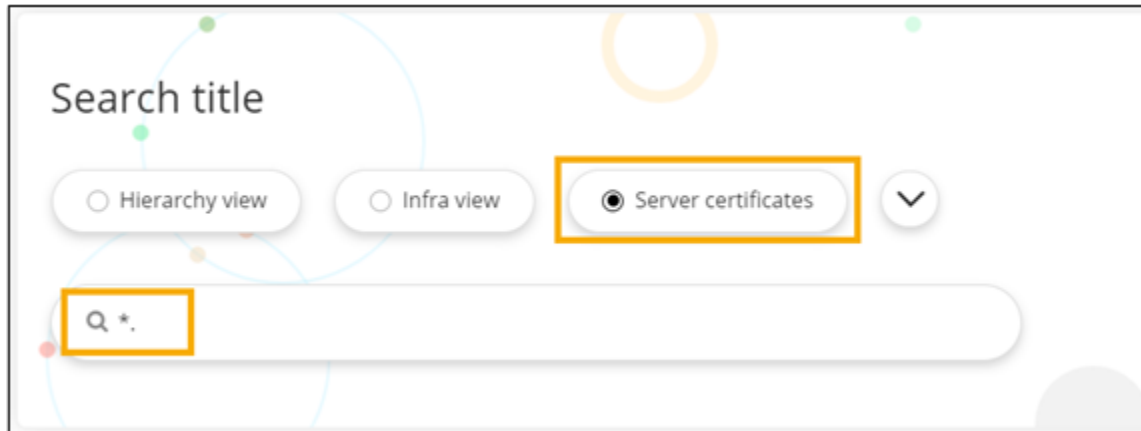


3. To restore the settings under **Styles** to default, click .

Search widget

Self-service Pages module allows you to search for applications, security services and certificates based on RBAC. The search widget can be customized based on infra and hierarchy view. Adding a search widget saves time by redirecting to the search results page on the same page.

For example, search for certificates by typing *. in the search field to get a list of all server certificates.



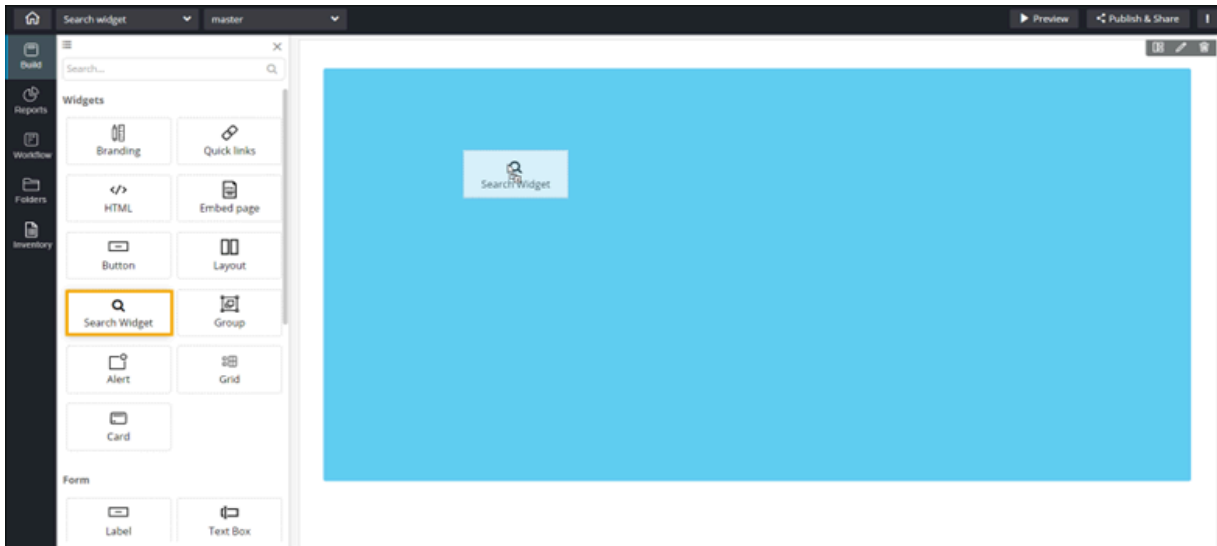
← Server certificates

Groups All Certificates 1837 ▾ 🔍 *. ▾ Actions ▾ Columns 1 to 20 of 20 < > 🔄

Common Name	Serial Number	Discovery Source	Group	Issuer Common Name	Valid to (GMT)	Status	Certificate Authority	Device Na...
* myriadpay.com	58:6F:30:1B:84...	192.168.40.152	Default jtko	thawte SSL CA - G2	11/26/2017 23...	Managed	OTHERS	
* safecharge.com	55:CF:D0:A4:6C...	192.168.40.152	Default jtko	thawte SHA256 SSL CA	11/15/2017 23...	Managed	OTHERS	
* minicabit.com	10:26:80:CD:7A...	192.168.40.152	Default jtko	Go Daddy Secure Cert...	10/14/2017 11...	Managed	GoDaddy	
* selfcommobile.com	67:21:84:FC:DF...	192.168.40.152	Default jtko	Network Solutions OV S...	06/07/2019 23...	Managed	OTHERS	
* dart-charge.co.uk	11:21:37:AD:6A...	192.168.40.152	Default jtko	AlphaSSL CA - SHA256 ...	07/23/2015 09...	Managed	OTHERS	
* SHA160RSA512.appviewx...	8E:28:F1:6E:09...	192.168.40.152	Default jtko	AppViewX Intermediate...	06/19/2018 09...	Managed	AppViewX	
* myriadpay.com	28:F8:0E:F1:20...	192.168.40.152	Default jtko	thawte SSL CA - G2	11/26/2016 23...	Managed	OTHERS	
* it.omrtdc.net	01:53:CC:65:F4...	192.168.40.152	Default jtko	DigiCert SHA2 High-Ass...	11/03/2017 12...	Managed	DigiCert	
* awon.com	23:D8:69:42:19...	192.168.40.152	Default jtko	GeoTrust SSL CA - G3	10/23/2017 23...	Managed	OTHERS	
* ecommzone.com	11:21:5C:52:C5...	192.168.40.152	Default jtko	GlobalSign Organizatio...	01/22/2018 11...	Managed	OTHERS	
* ee-stats.com	64:1C:0E:2D:85...	192.168.40.152	Default jtko	COMODO RSA Domain ...	09/26/2017 23...	Managed	Comodo Certificate M...	
* platinumwidaps12.app...	F6:C2:23:84:31...	192.168.40.152	Default jtko	Test RSA Certification A...	06/20/2020 23...	Managed	Comodo Certificate M...	
* corethree.net	09:24:BE	192.168.40.152	Default jtko	RapidSSL SHA256 CA - ...	03/23/2018 20...	Managed	OTHERS	
* pes.aspect-cloud.net	03:6D:9C:7E:A7...	192.168.40.152	Default jtko	DigiCert SHA2 Secure S...	01/03/2018 12...	Managed	DigiCert	

To add a Search widget to your page:


1. Drag and drop the **Search widget** component to any blue highlighted space on the page.

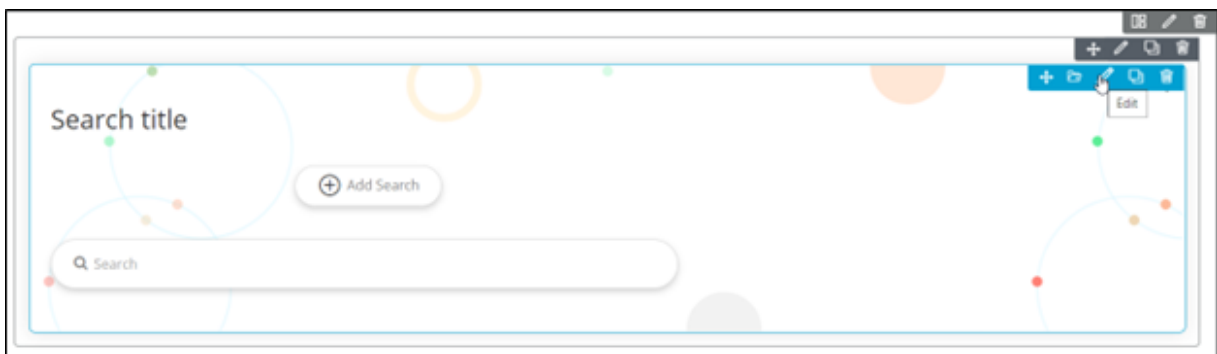


2. To configure Search widget **Properties**, click [here](#).
3. To configure Search widget **Styles**, click [here](#).

- [Configuring the Search Widget - Properties](#)
- [Editing a search widget](#)
- [Deleting a single search widget](#)
- [Configuring the Search Widget - Styles](#)

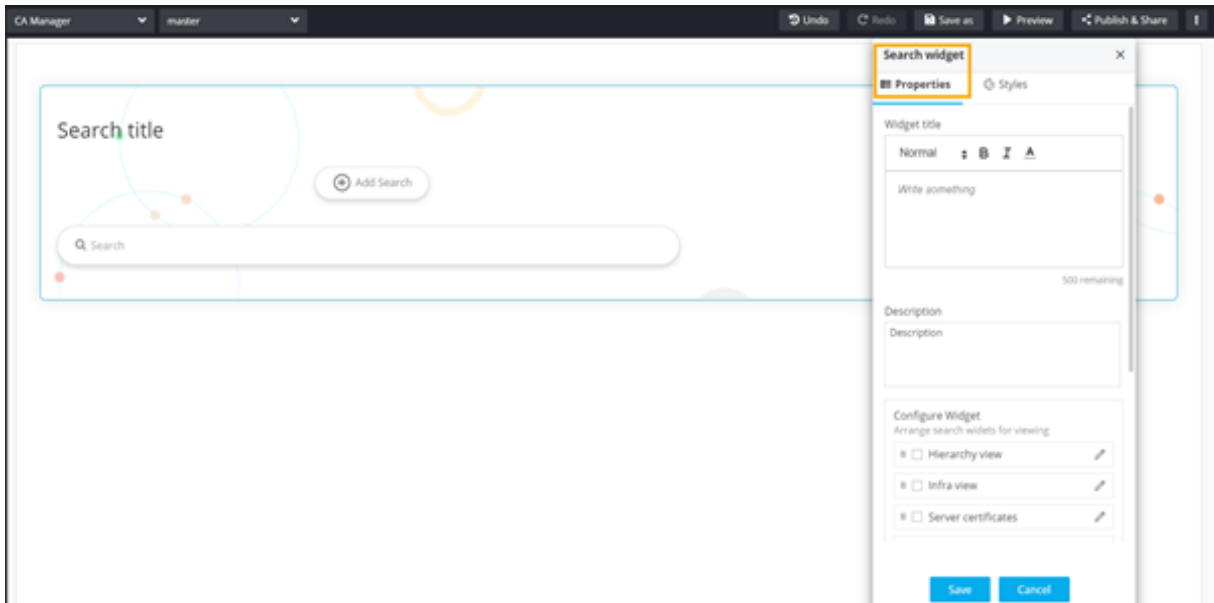
Configuring the Search Widget - Properties

1. To configure/edit the Search Widget component, hover your mouse over the widget and click .






Tip: To configure/edit the Search Widget component, you can also click **Add Search** in the Search widget.

The **Search widget** window opens with the **Properties** tab open by default.



2. In the **Search widget** window, under **Properties**, enter or select the required field information.

The following table describes the various fields in this tab:

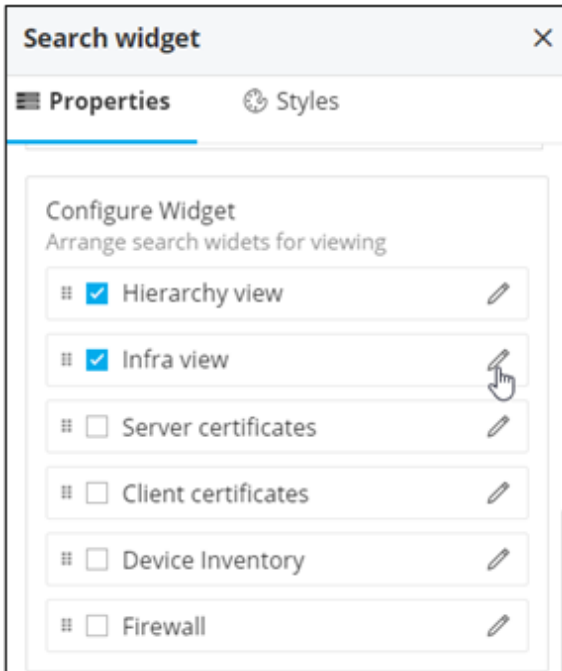
Field	Description
Widget title	Provide a suitable title for the Search widget. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; background-color: #E6F2FF;">  Note: You have the option to set the font size, color, and thickness in the Widget title editor box. </div>
Description	Allows you to add a Description for the search widget.
Configure Widget	Select the search parameters that would appear in the search widget by checking the box. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; background-color: #E6F2FF;">  Note: You have the option to edit the search widgets, add descriptions and tooltips by clicking . For more information, click here. </div>
Widget Layout	Choose a widget layout from the available options.

3. Click **Save**.

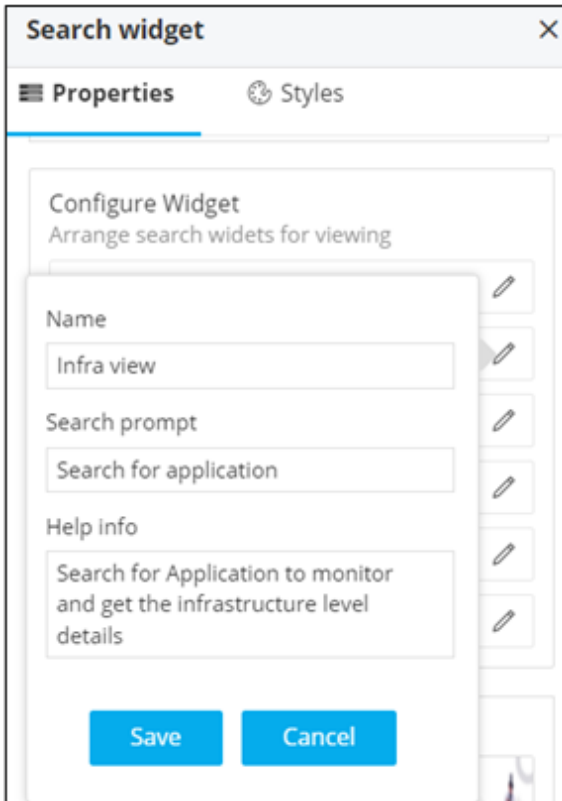
Editing a search widget

To edit a specific search widget:

1. In the **Search widget** window, under **Properties**, click  next to the widget to be edited.



2. Enter all the field information.

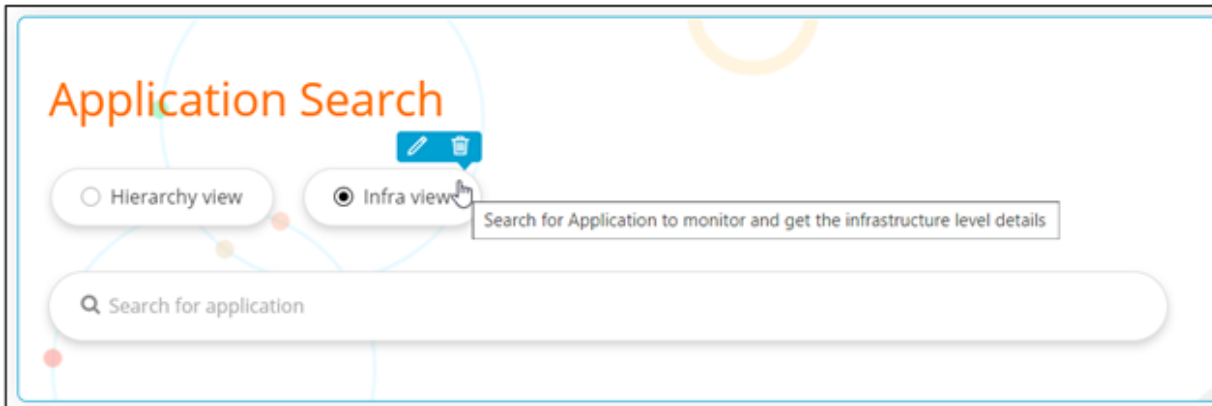




The following table describes the field information:

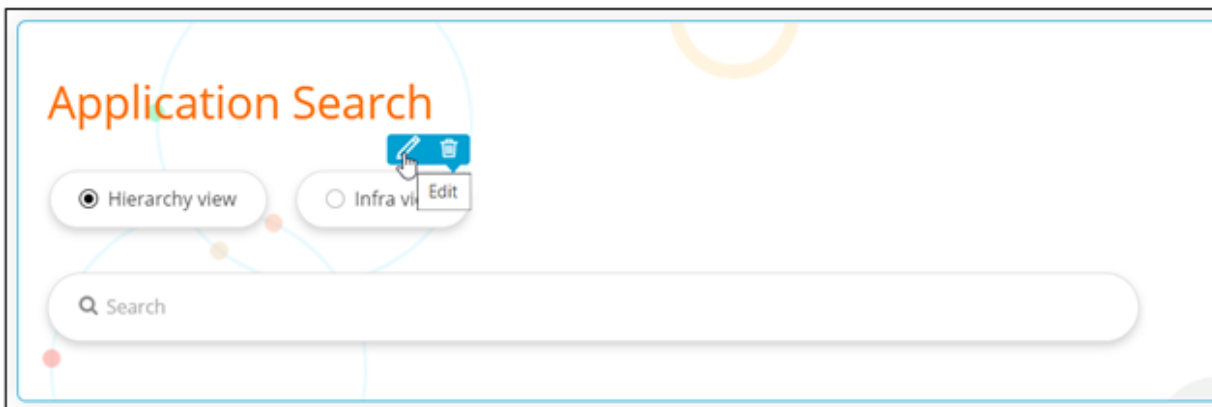
Field	Description
Name	Allows you to change the name of the search widget.
Search prompt	Allow you to add a search prompt in the search bar when a particular search widget is selected.
Help info	Allows you to add a help text to the search widget.

3. Click **Save**.


The search prompt and help info is updated in the search widget.

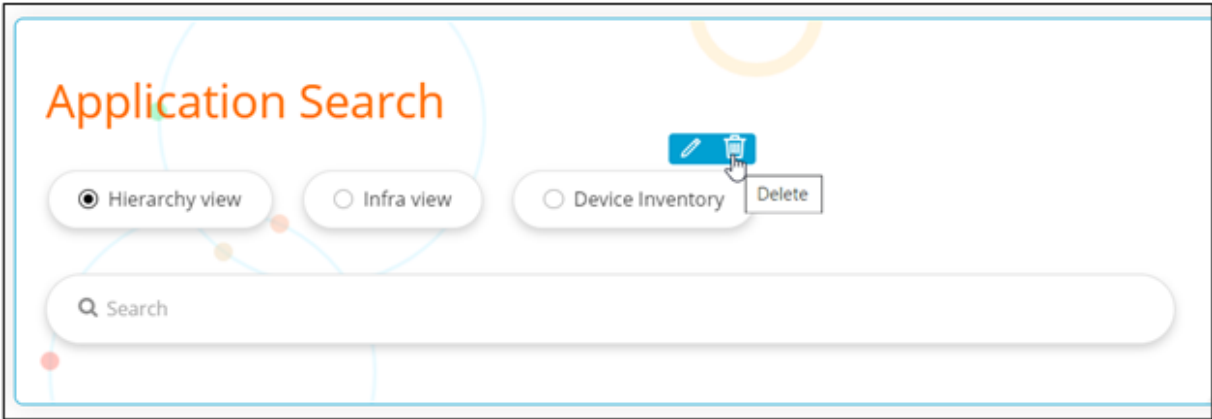


 **Note:** You can also edit the search widget, by hovering your mouse over the search widget and clicking .

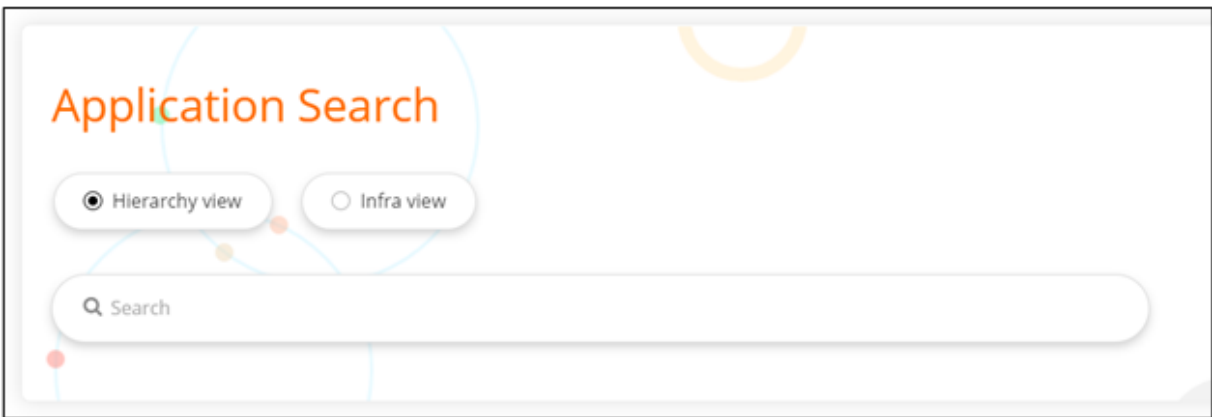


Deleting a single search widget

1. Hover your mouse over the search widget to be deleted.
2. Click .




The selected search widget is deleted.



Configuring the Search Widget - Styles

1. For more options to customize the **Search Widget**, in the **Search Widget** window, click **Styles**.

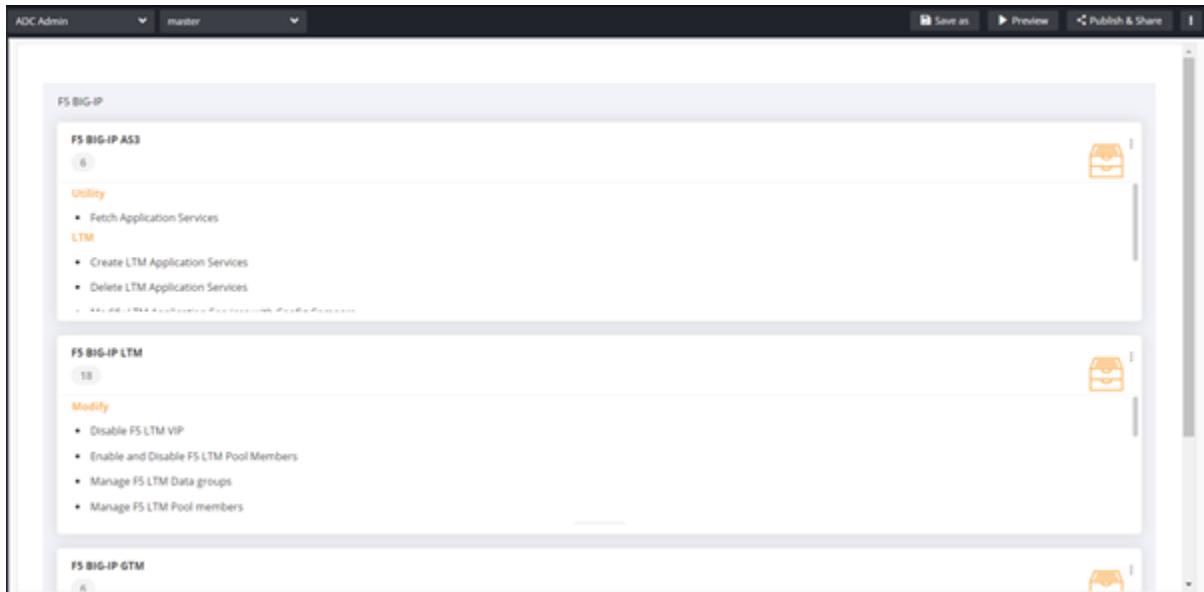


2. Under **Sizing**, you can increase/decrease the height and width of the search widget.
3. To save your settings, click **Save**.
4. To restore the settings under **Styles** to default, click .

Group

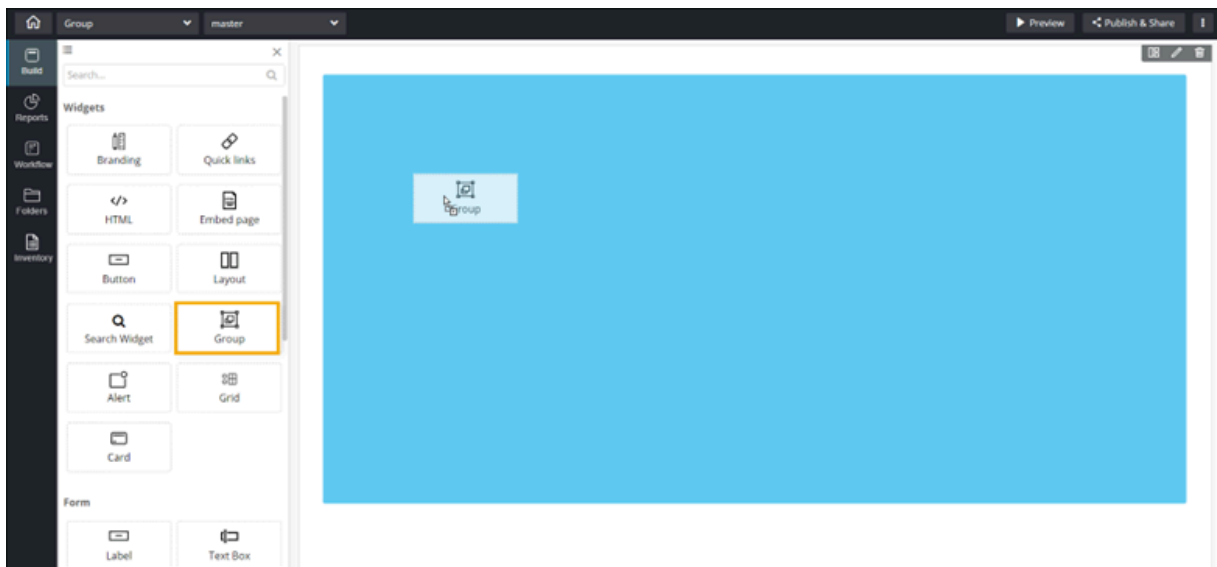
Self-service Pages can be customized for logical grouping of multiple page components. You can club together related widgets such as workflow catalogs

or reports and arrange them under one group for easy access and visibility.



To add a Group component to your page:

1. Drag and drop the **Group** component to any blue highlighted space on the page.

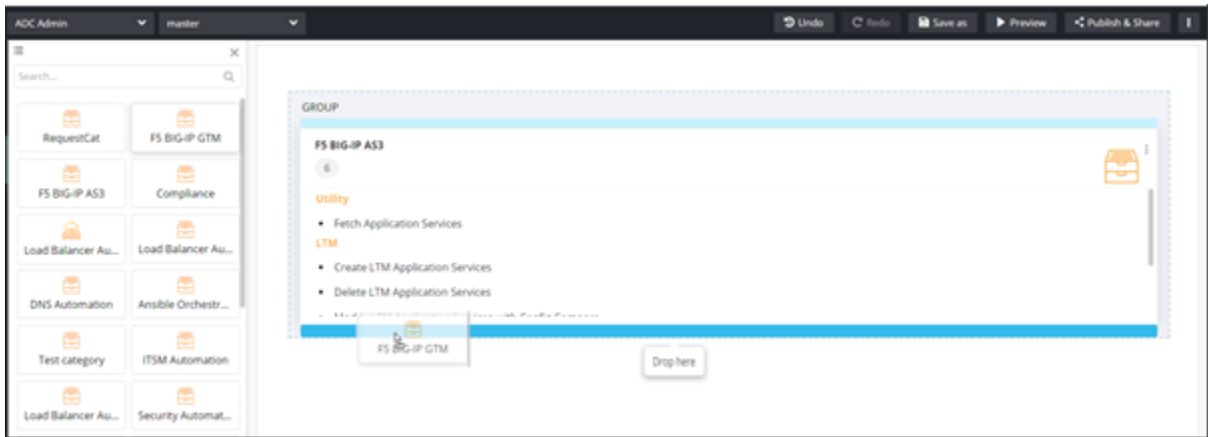


2. To configure the Group **Properties**, click [here](#).
3. To configure the Group **Styles**, click [here](#).

- [Configuring the Group widget - Properties](#)
- [Configuring the Group widget - Styles](#)

Configuring the Group widget - Properties

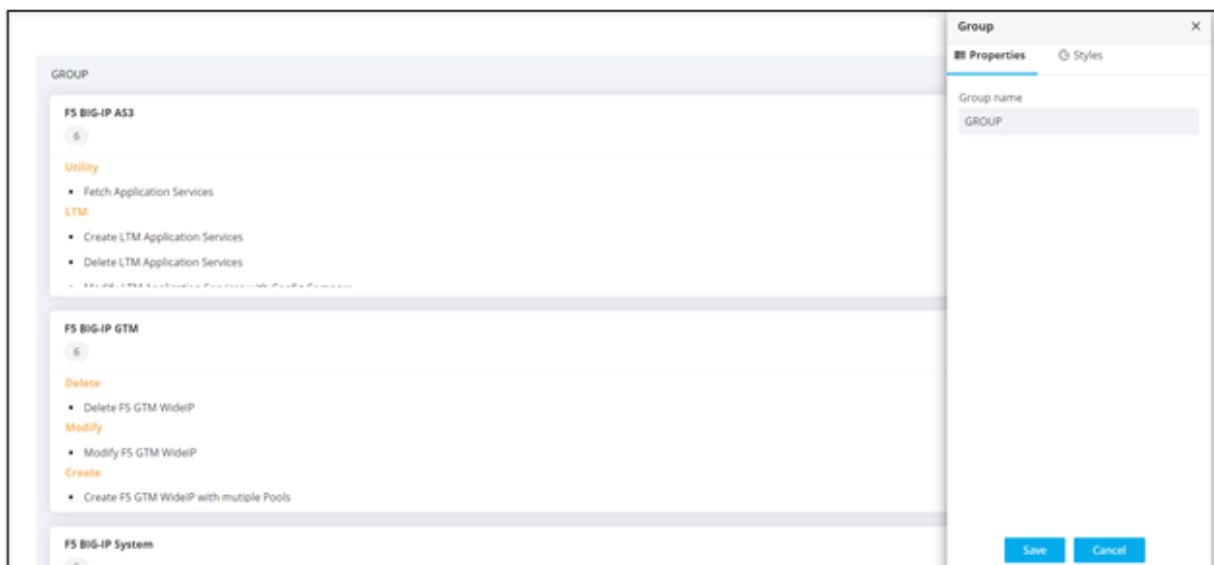
1. Drag and drop related widgets into this **Group** component to view them all in one place.



2. To configure/edit the Group component, click .



The **Group** pop-up window opens with the **Properties** tab open by default.

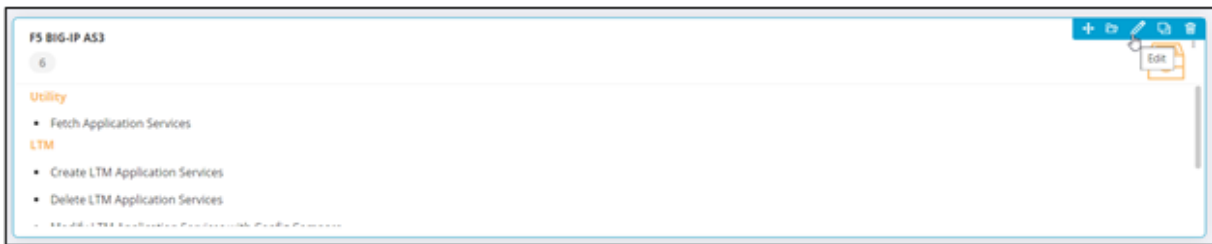


3. In the **Group** window, under **Properties**, you can change the **Group name**.



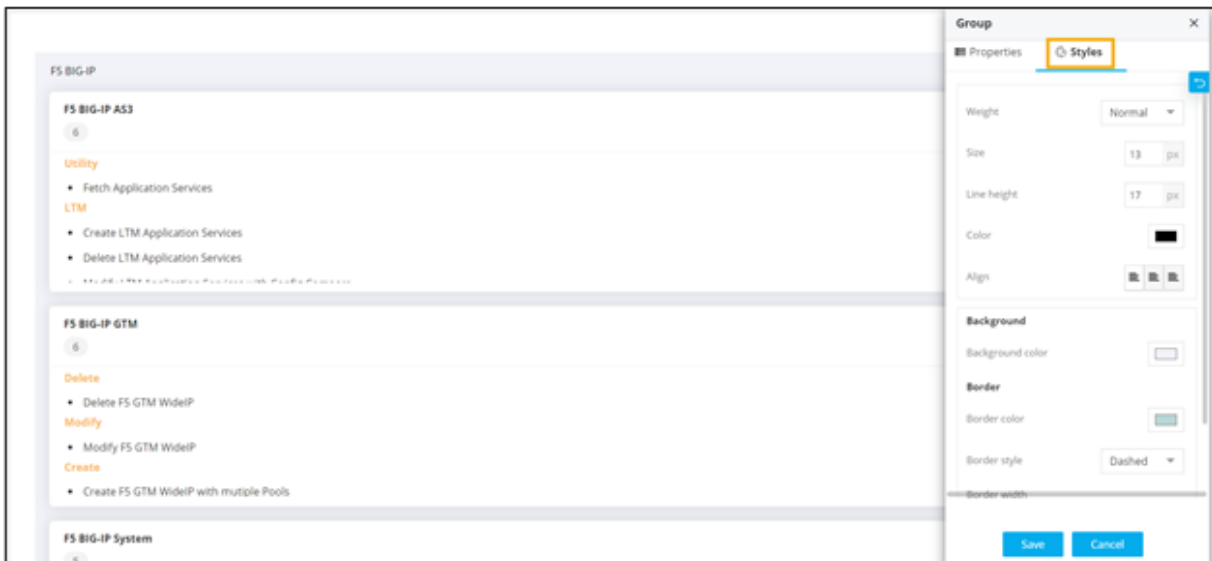
4. Click **Save**.

5. To configure individual widgets within the group, hover your mouse over the specific widget and click



Configuring the Group widget - Styles

1. For more options to customize the **Group** component, in the **Group** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Option	Description
Weight	<p>The Weight dropdown list lets you set the font thickness of the field label using one of the following values:</p> <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font Size of the field name.
Line height	Allows you to increase/decrease the Line height of the field. This means the space between the field and the field border.
Color	Allows you to define the Color of the field label.
Align	Allows you to Align the field label to the left, center or right side of the field.
Background	Allows you to define the Background color for the HTML widget.
Border	<p>Allows you to define the</p> <ul style="list-style-type: none"> • Border color - Select the color of the layout border. • Border style - Select the border style for the layout section from the options available in the dropdown. • Border width - Select the thickness of the layout border.

2. To save your settings, click **Save**.

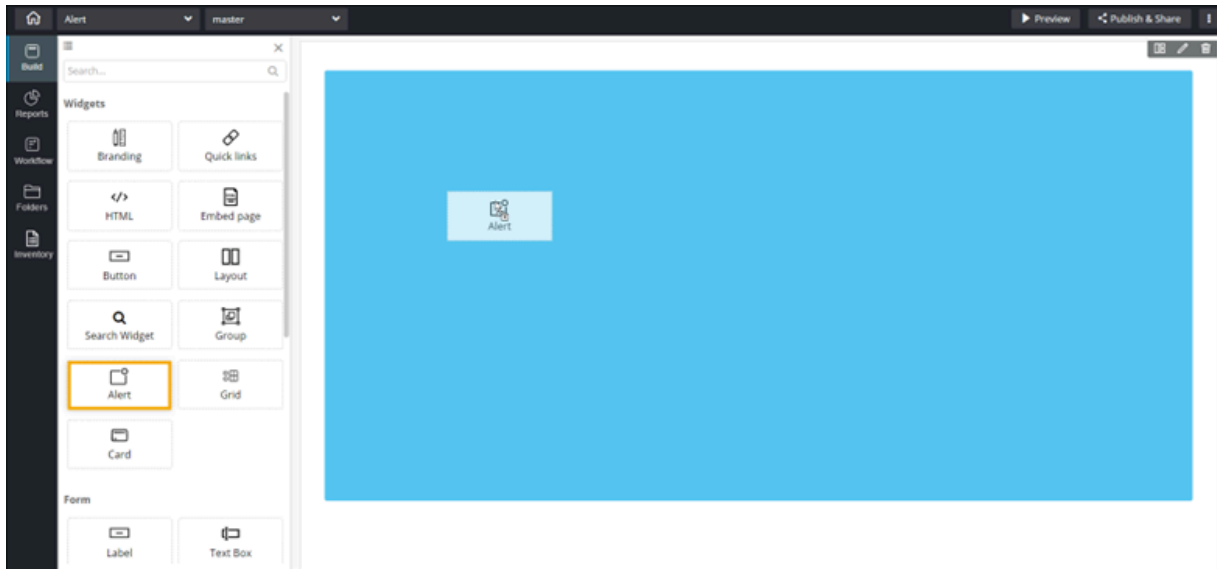
3. To restore the settings under **Style** to default, click 

Alert

Self-service Pages module allows you to add automation and self-service request alerts to your customized page. This widget displays the status of workflow requests - total requests, open, closed and failed.

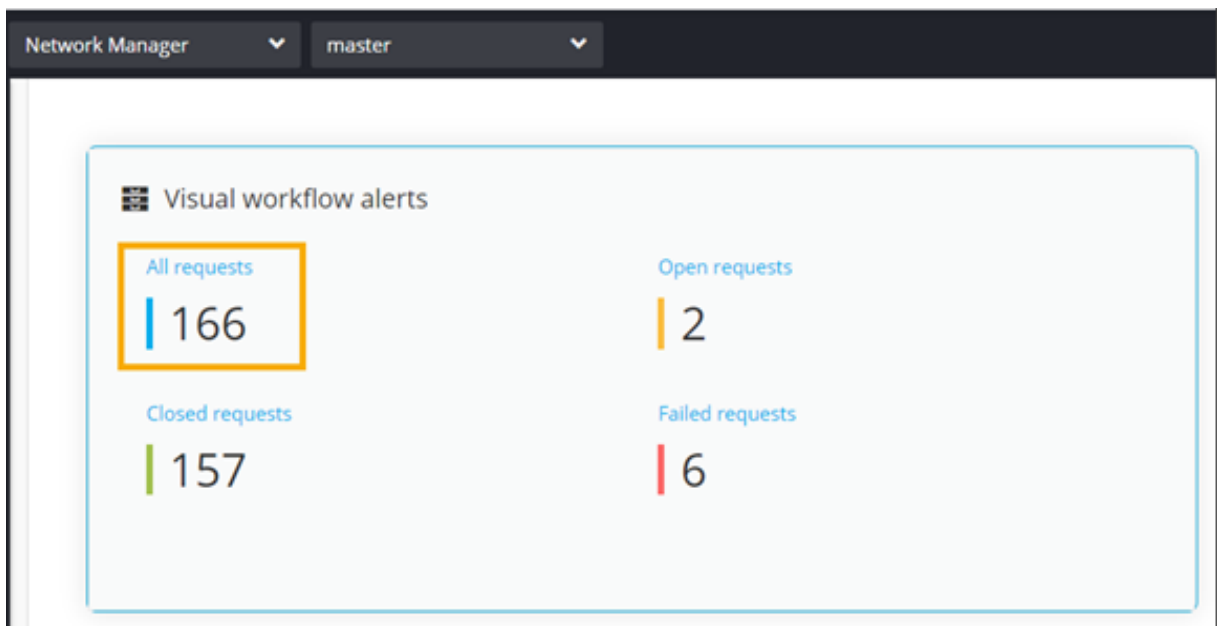
To add the **Alert** component to your page:

1. Drag and drop the **Alert** component to any blue highlighted space on the page.

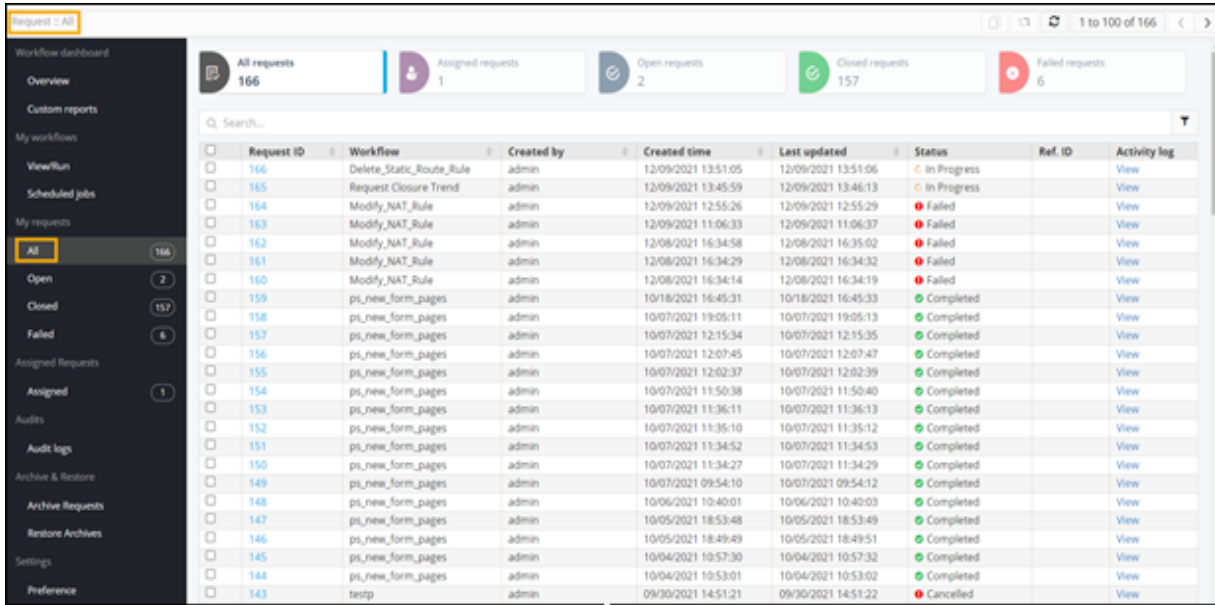


The **Alert** component displays the visual workflows requests as per their status - all, open, closed and failed.

2. To redirect to the Workflow Request page showing **All requests** triggered by a user, in the **Visual workflow alerts** widget, click **All requests**.



The **Request :: All** page opens in a new tab.




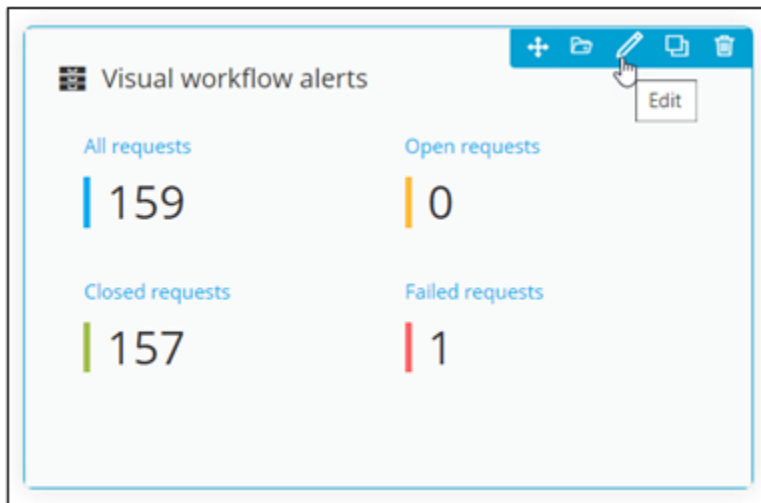
Request ID	Workflow	Created by	Created time	Last updated	Status	Ref. ID	Activity log
166	Delete_Static_Route_Rule	admin	12/09/2021 13:51:05	12/09/2021 13:51:06	In Progress		View
165	Request Closure Trend	admin	12/09/2021 13:45:59	12/09/2021 13:46:13	In Progress		View
164	Modify_NAT_Rule	admin	12/09/2021 12:55:26	12/09/2021 12:55:29	Failed		View
163	Modify_NAT_Rule	admin	12/09/2021 11:06:33	12/09/2021 11:06:37	Failed		View
162	Modify_NAT_Rule	admin	12/08/2021 16:34:58	12/08/2021 16:35:02	Failed		View
161	Modify_NAT_Rule	admin	12/08/2021 16:34:29	12/08/2021 16:34:32	Failed		View
160	Modify_NAT_Rule	admin	12/08/2021 16:34:14	12/08/2021 16:34:19	Failed		View
159	pi_new_form_pages	admin	10/18/2021 16:45:31	10/18/2021 16:45:33	Completed		View
158	pi_new_form_pages	admin	10/07/2021 19:05:11	10/07/2021 19:05:13	Completed		View
157	pi_new_form_pages	admin	10/07/2021 12:15:34	10/07/2021 12:15:35	Completed		View
156	pi_new_form_pages	admin	10/07/2021 12:07:45	10/07/2021 12:07:47	Completed		View
155	pi_new_form_pages	admin	10/07/2021 12:02:37	10/07/2021 12:02:39	Completed		View
154	pi_new_form_pages	admin	10/07/2021 11:50:38	10/07/2021 11:50:40	Completed		View
153	pi_new_form_pages	admin	10/07/2021 11:36:11	10/07/2021 11:36:13	Completed		View
152	pi_new_form_pages	admin	10/07/2021 11:35:10	10/07/2021 11:35:12	Completed		View
151	pi_new_form_pages	admin	10/07/2021 11:34:52	10/07/2021 11:34:53	Completed		View
150	pi_new_form_pages	admin	10/07/2021 11:34:27	10/07/2021 11:34:29	Completed		View
149	pi_new_form_pages	admin	10/07/2021 09:54:10	10/07/2021 09:54:12	Completed		View
148	pi_new_form_pages	admin	10/06/2021 10:40:01	10/06/2021 10:40:03	Completed		View
147	pi_new_form_pages	admin	10/05/2021 18:53:48	10/05/2021 18:53:49	Completed		View
146	pi_new_form_pages	admin	10/05/2021 18:49:49	10/05/2021 18:49:51	Completed		View
145	pi_new_form_pages	admin	10/04/2021 10:57:30	10/04/2021 10:57:32	Completed		View
144	pi_new_form_pages	admin	10/04/2021 10:53:01	10/04/2021 10:53:02	Completed		View
143	testp	admin	09/30/2021 14:51:21	09/30/2021 14:51:22	Cancelled		View

3. To configure Alert widget **Properties**, click [here](#).
4. To configure Alert widget **Styles**, click [here](#).

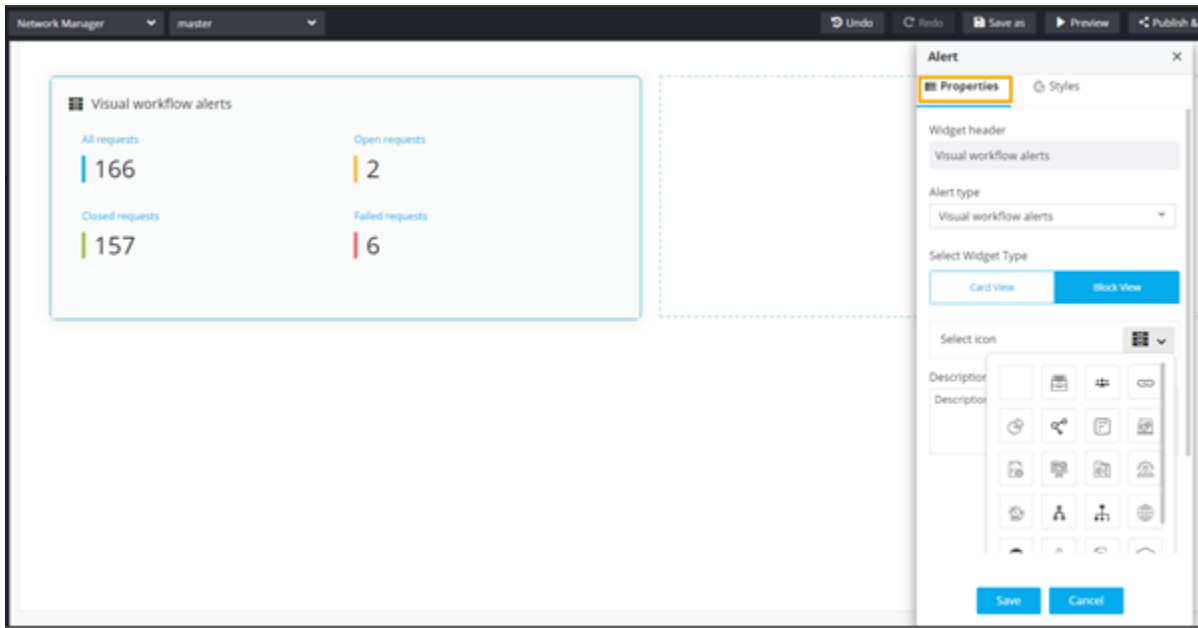
- [Configuring the Alert widget - Properties](#)
- [Configuring the Alert widget - Styles](#)

Configuring the Alert widget - Properties

1. To configure/edit the **Alert** widget, hover your mouse over the widget and click .



The **Alert** widget window opens with the **Properties** tab open by default.



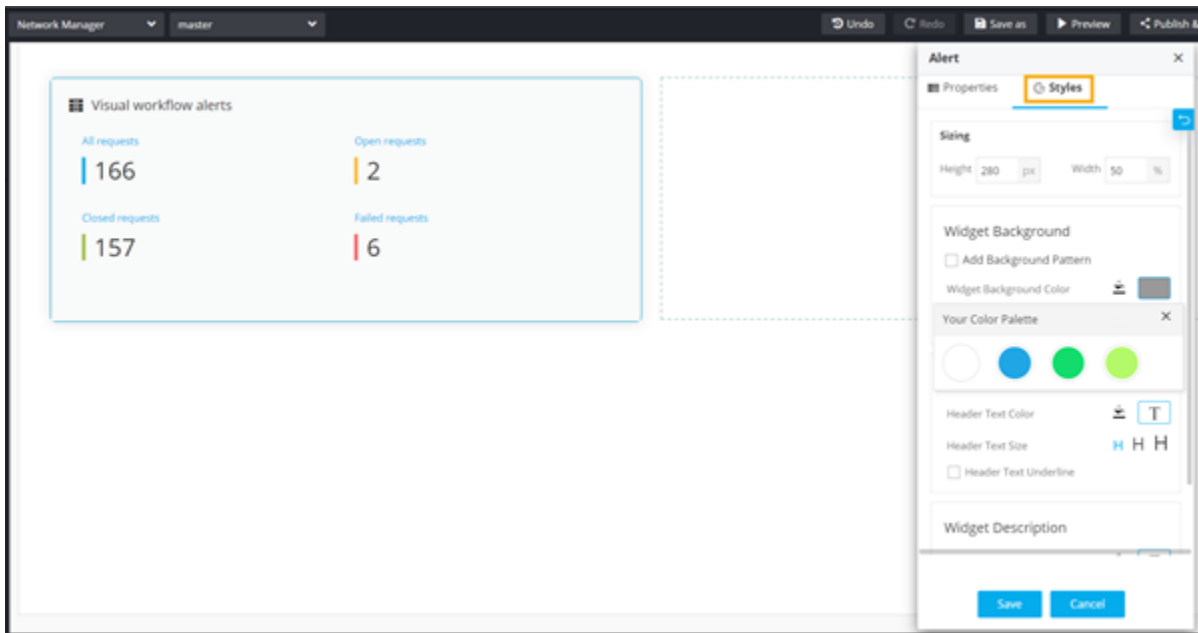
2. In the **Alert** window, under the **Properties** tab, enter or select the required field information. The following table describes the options under the **Properties** tab:

Field	Description
Widget header	Allows you to rename the widget header.
Alert Type	Allows you to select the Alert Type from the options available in the dropdown.
Select Widget Type	Allows you to switch between Card View and Block View.
Select Widget Icon	Allows you to select an icon for the widget from the options available in the dropdown.
Description	Allows you to add a description for the widget.

3. Click **Save**.

Configuring the Alert widget - Styles

1. For more options to customize the Alert widget, in the **Alert** window, click **Styles**.



This table describes the options available under the **Styles** tab:

Field	Description
Sizing	Allows you to increase/decrease the height and width of the widget.
Widget Background	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	The following options are available here:

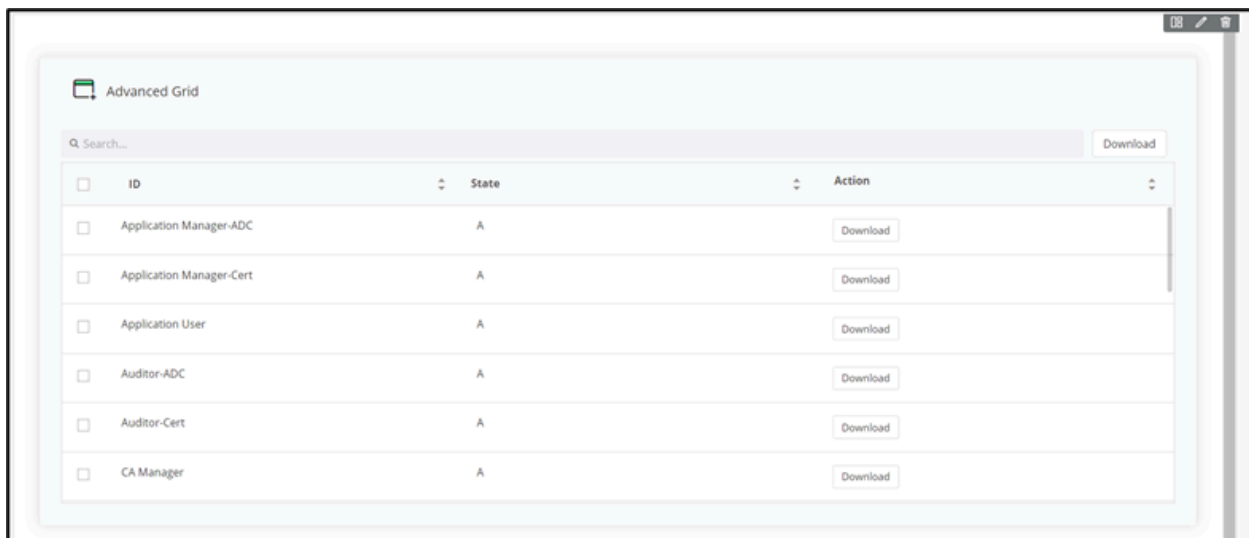
Field	Description
	<ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Widget Description	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Label text Color: Allows you to change the color of the label text. • Label Text Size: Allows you to select the size of the label text.

2. To save your settings, click **Save**.

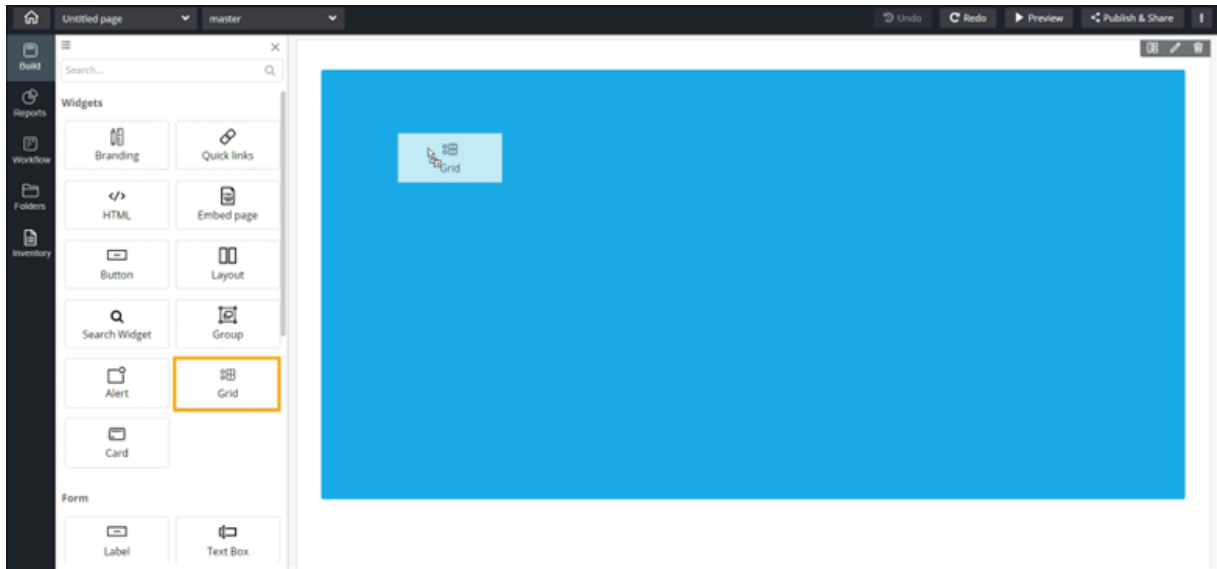
3. To restore the settings under **Style** to default, click 

Grid

Self service Pages module allows you to add a Grid to your page. This widget allows you to display data in a standard layout with rows and columns.




1. To add the Grid to your form, drag and drop the **Grid** component to the design canvas.

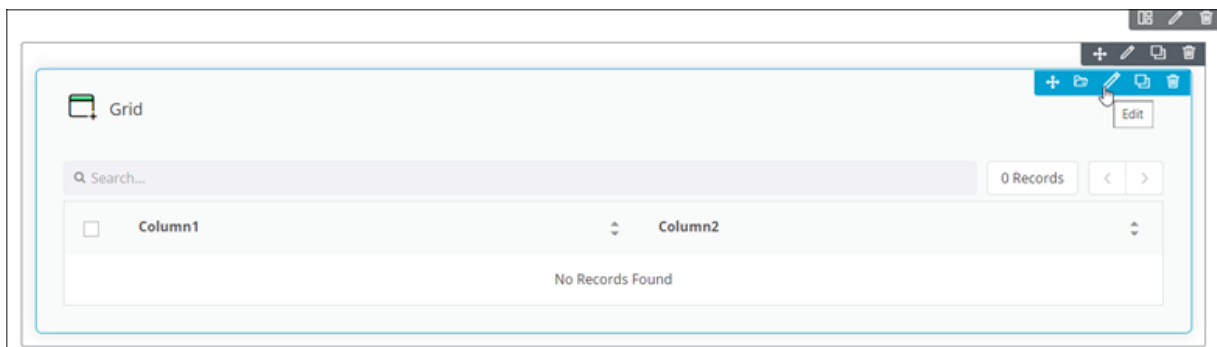


2. To configure the Group **Properties**, click [here](#).
3. To configure the Group **Styles**, click [here](#).

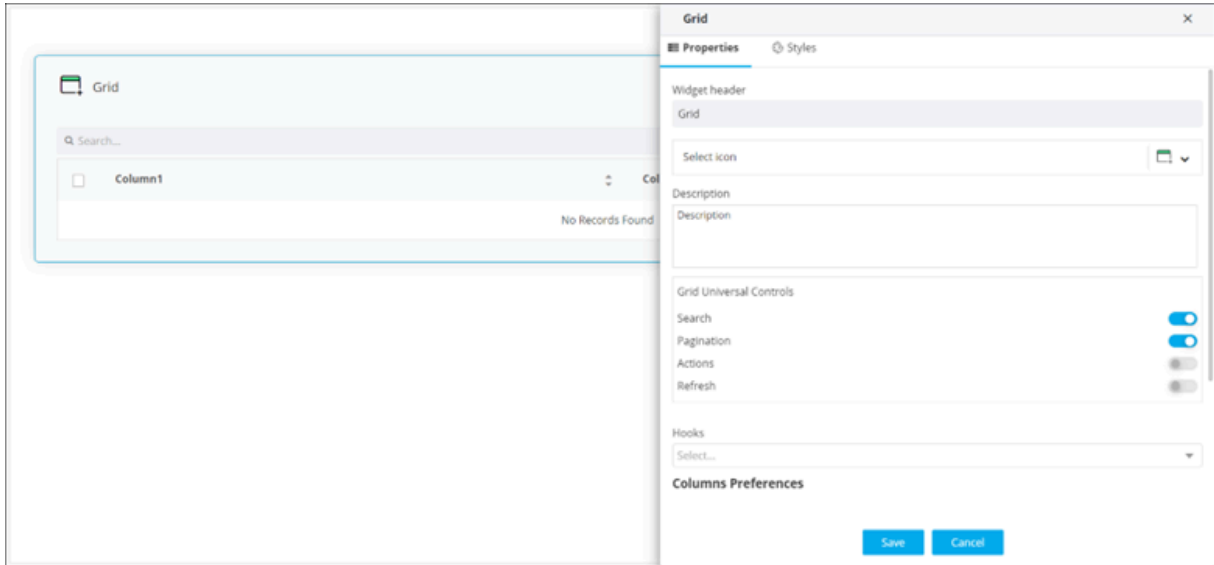
- [Configuring the Grid - Properties](#)
- [Configuring Columns in the Grid](#)
- [Configuring the Grid - Styles](#)

Configuring the Grid - Properties

1. To configure the **Grid**, hover your mouse over the field and click .




The **Grid** pop-up window opens with the **Properties** tab open by default.



2. In the **Grid** window, under **Properties**, enter or select the required field information.

The following table describes the options under the **Properties** tab:

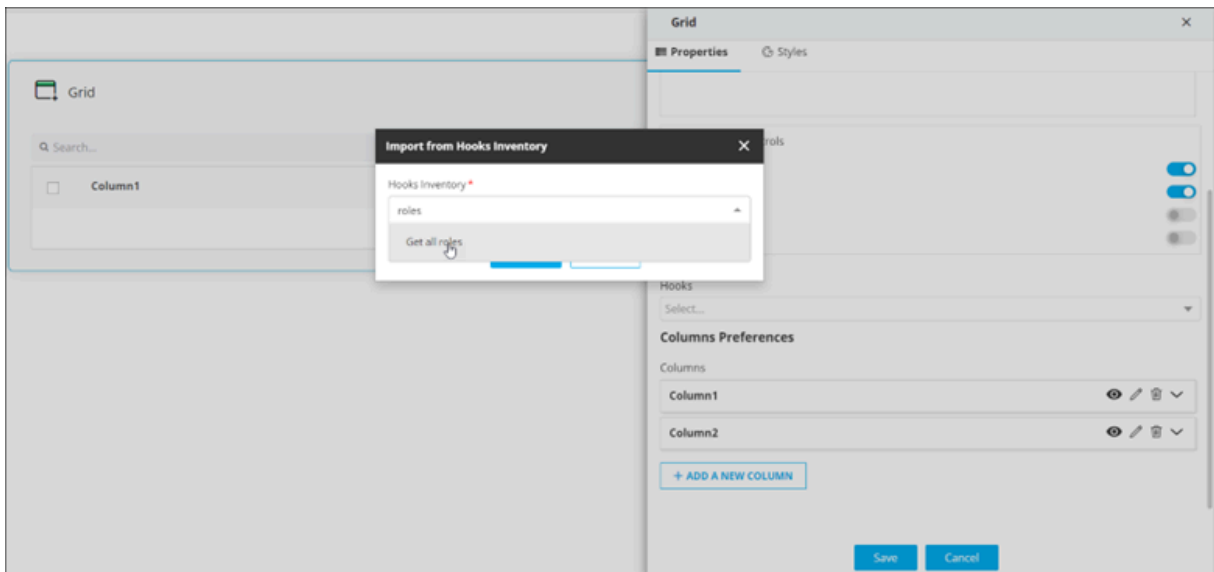
Field	Description
Widget header	Allows you to rename the widget header.
Select icon	Allows you to select an icon for the widget from the options available in the dropdown.
Description	Allows you to add a description for the widget.
Grid Universal Controls	Allows you to enable/disable the following: <ul style="list-style-type: none"> • Search: Turn off the toggle for Search if you don't want the Search bar to be displayed in the grid. Enabling the Search bar allows you to quickly search for a particular item in the grid. • Pagination: Turn on the toggle for Pagination to display the number of records that can be viewed on a page. Enabling Pagination allows a page with high volumes of data to load faster. • Actions: Turn off the Actions toggle if you don't want the Action buttons to be displayed in the grid. Enabling action buttons such as Add, Edit, and Delete allows you to quickly perform these actions and modify the grid.
Hooks	Allows you to assign an appropriate hook for this field.

Field	Description
	<ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Adding Hooks to Form Fields, click here. </div>
Column Preferences	Allows you to configure the columns in the grid.


3. Click **Save**.

Configuring Columns in the Grid

1. In the **Grid** window, under **Properties**, assign a hook by selecting an option from the dropdown. For example, **Import** the **Get all roles** hook.



Note: For more information on Adding Hooks to Form Fields, click [here](#).

2. Under **Columns Preferences**, to change the name of the first column, click  .

3. Type the name of the column as required and click  .

4. To configure the **Column Type**, click .

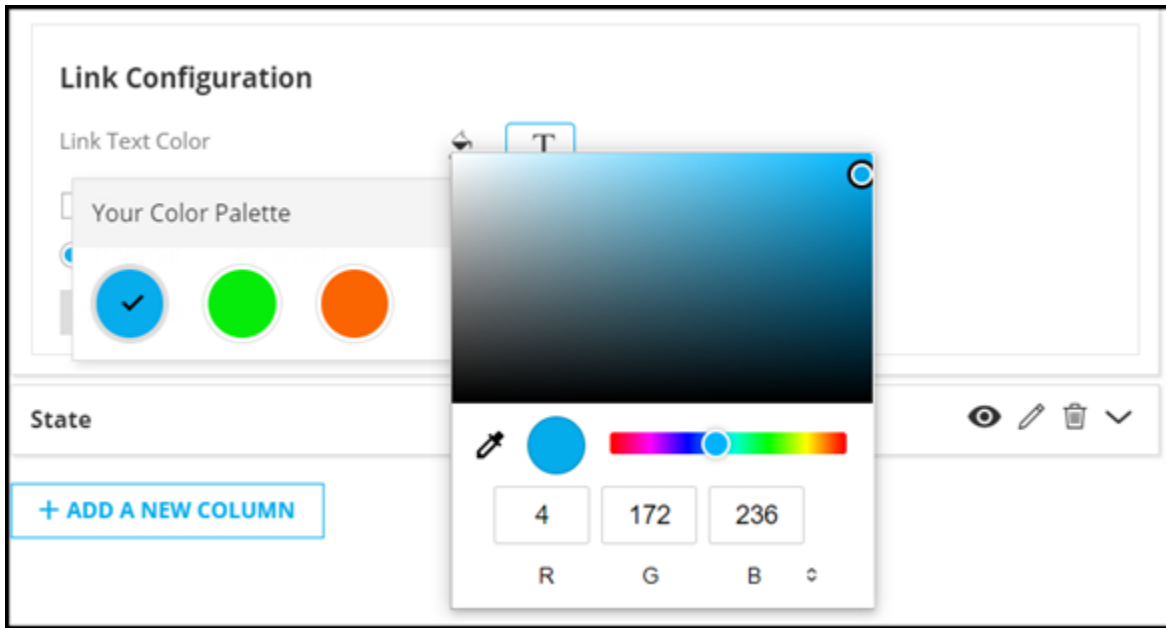
The following options are available:

- **Plaintext:** Select this option to display the column items as plain text.
- **Link:** Select this option to add links to each column item.
- **Actions:** Select this option to add actions such as Download or Delete to the columns.

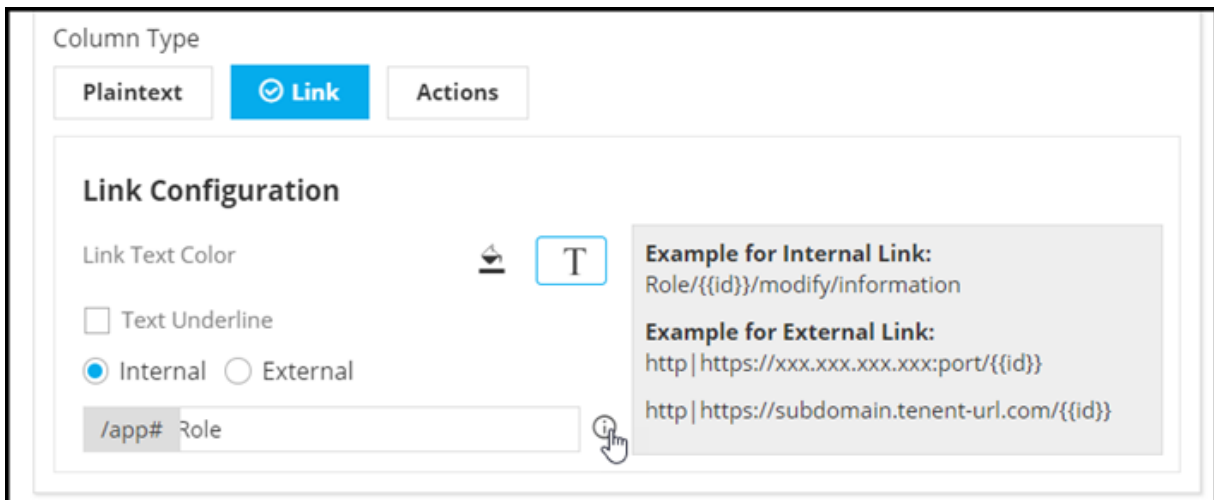
5. To configure links for the column items, under **Column Type**, click **Link**.

The **Link Configuration** option is displayed.

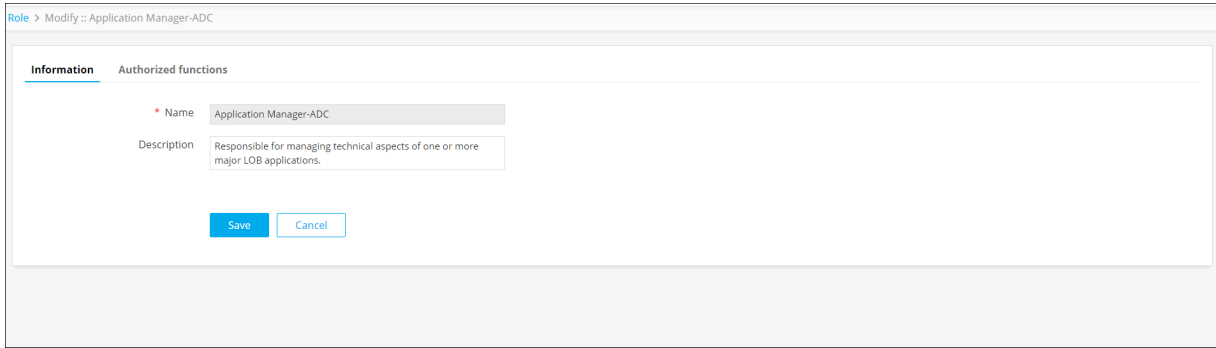
6. Select the color for the **Link Text**.



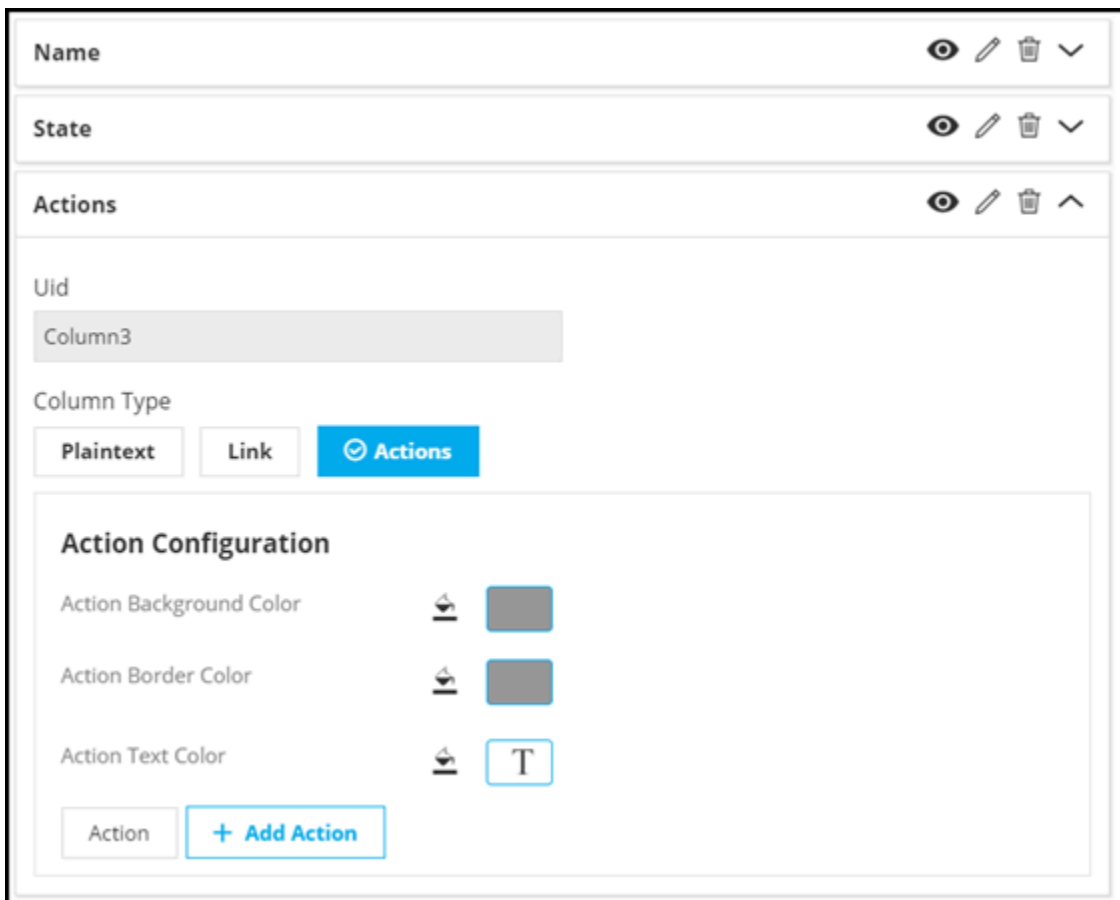
7. Select the **Text Underline** checkbox to underline the link text.
8. Select the type of link to be assigned to the column fields. For example, **Internal**.




9. Clicking on any role under the **Name** column, will redirect to the linked page.



- To configure an action for a column, under **Column Type**, click **Actions**.
The **Action Configuration** option is displayed.



- Select the **Action Background Color**.
- Select the **Action Border Color**.
- Select the **Action Text Color**.
- To add an action for the column field, hover your mouse over **Action** and click .
More fields to add the action are displayed as shown.

15. Enter the **Action label**. For example: **Download**.
16. Select the **Action Type** as **Download** or **Others**. For example, select Download to download the list of roles to your machine as a .csv file.
17. Select the hook to be assigned to the action. For example: **Role Download**.



Note: For more information on Adding Hooks to Form Fields, click [here](#).

18. Click **Save**.

The configured action is added to the grid.




Note: You can also add actions to the grid by turning on the **Actions** toggle under **Grid Universal Controls**.

19. To add more actions to the grid, under **Action Configuration**, click **Add Action**.

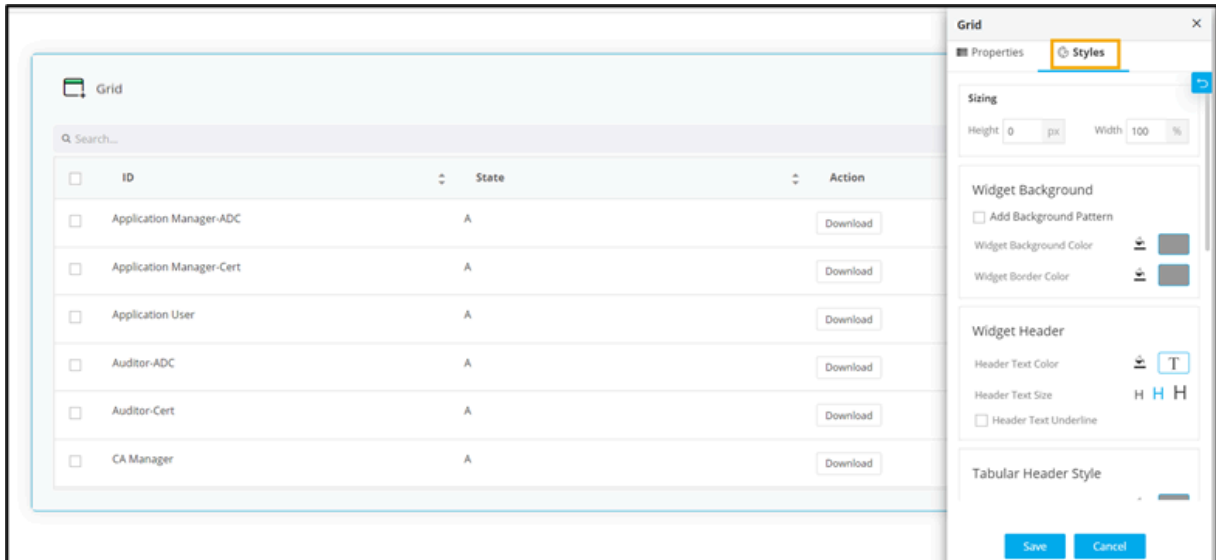
20. For options on configuring this action, hover your mouse over the action and click .



21. To delete this action, hover your mouse over the action and click .

Configuring the Grid - Styles

1. For more options to customize the Grid component, in the **Grid** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Sizing	Allows you to increase/decrease the height and width of the widget.
Widget Background	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Tabular Header Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Header Background Color - Select the background color for the header from the available options. • Header Text Color - Select the header text color from the available options. • Header Text Size - Select the header text size from the available options. • Header Text Alignment - Select the header alignment as left, right or centre.
Tabular Row Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Row Background Color - Select the background color for the row from the available options. • Row Color - Select the row color from the available options. • Row Text Size - Select the row text size from the available options. • Row Text Alignment - Select the row alignment as left, right or centre.
Icon Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Icon Color - Select the Icon Color from the available options. • Icon Background - Select the Icon Background from the available options. • Icon Background Color - Select the Icon Background Color from the available options.

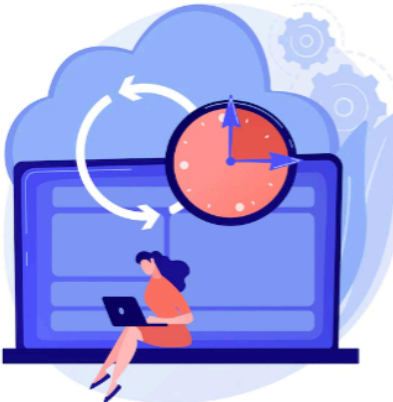
2. To save your settings, click **Save**.

3. To restore the settings under **Style** to default, click 

Card

Self-service Pages module allows you to add a Card component to your page. This widget allows you to add multiple links, buttons, and content.

Setup



Cloud Connector

Enable connectivity to the Enterprise Network

[Setup Cloud Connector](#) [📍 Tour](#) [📖 Guide](#)

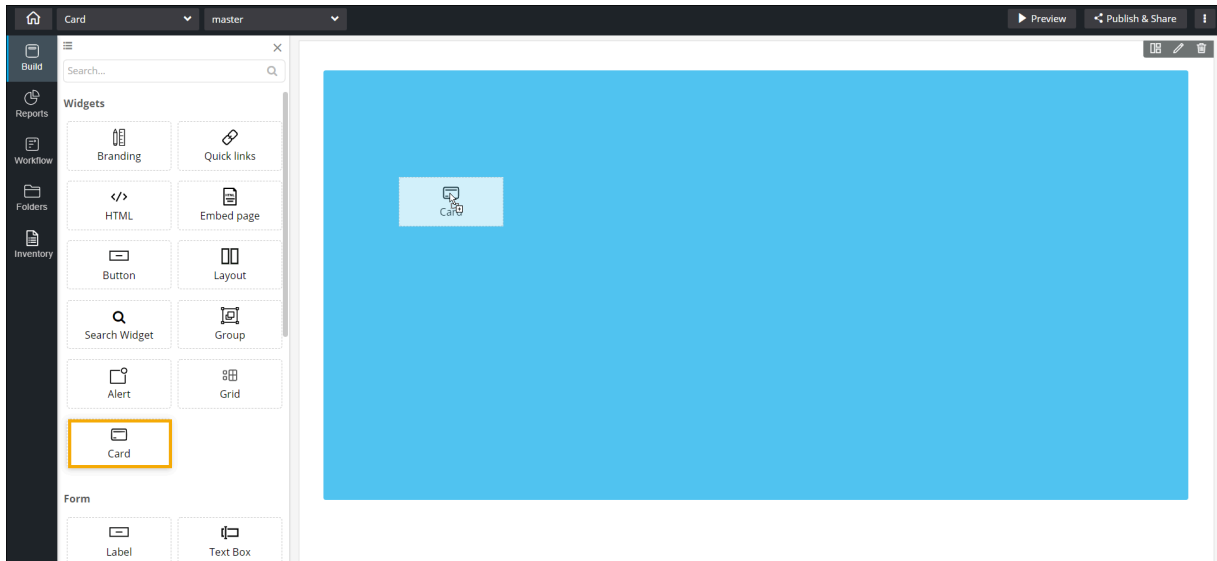
[Download Cloud Connector OVA](#)

AppViewX Windows Gateway

Required for Microsoft CA & IIS Server integration

[Download Windows Gateway](#) [📖 Guide](#)

1. To add the Card widget to your form, drag and drop the **Card** component to the design canvas.




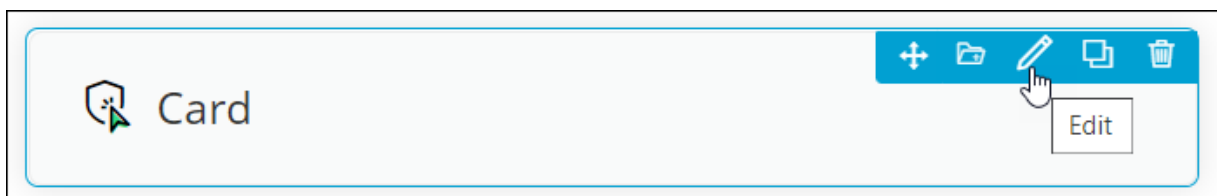
2. To configure the Card **Properties**, click [here](#).

3. To configure the Card **Styles**, click [here](#).

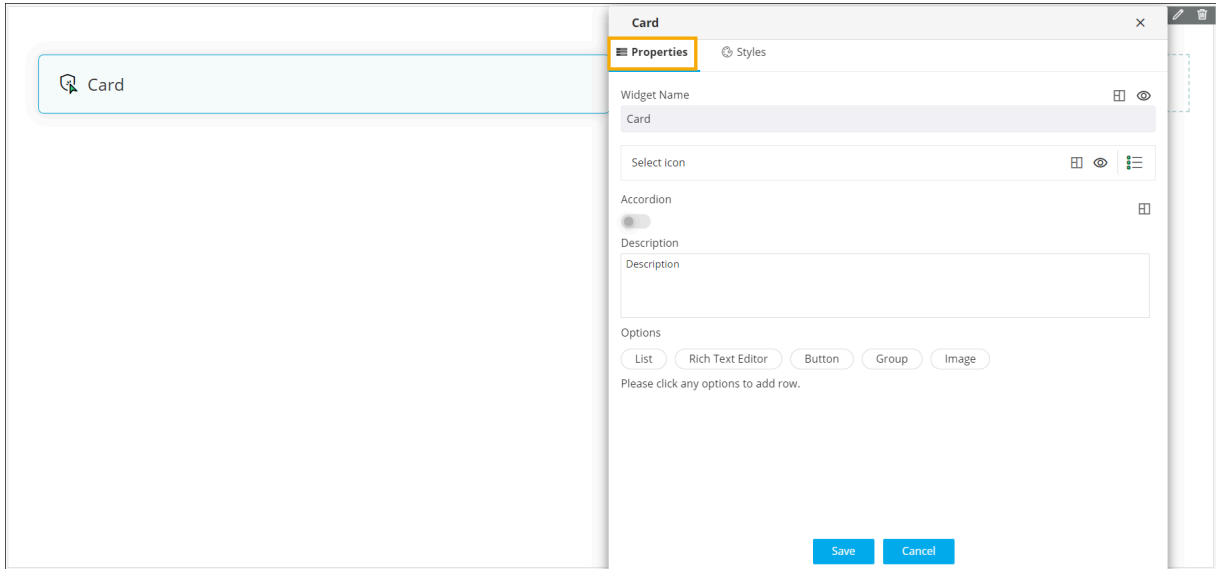
- [Configuring the Card - Properties](#)
- [Configuring Lists in the Card Widget](#)
- [Configuring Rich Text Editor in the Card Widget](#)
- [Configuring a Button in the Card Widget](#)
- [Configuring Grouping in the Card Widget](#)
- [Configuring Images in the Card Widget](#)
- [Configuring the Card - Styles](#)

Configuring the Card - Properties

1. To configure the **Card** widget, hover your mouse over the widget and click .













The **Card** pop-up window opens with the **Properties** tab open by default.



2. In the **Card** widget window, under **Properties**, enter or select the required field information.

The following table describes the options under the **Propertiestab**:

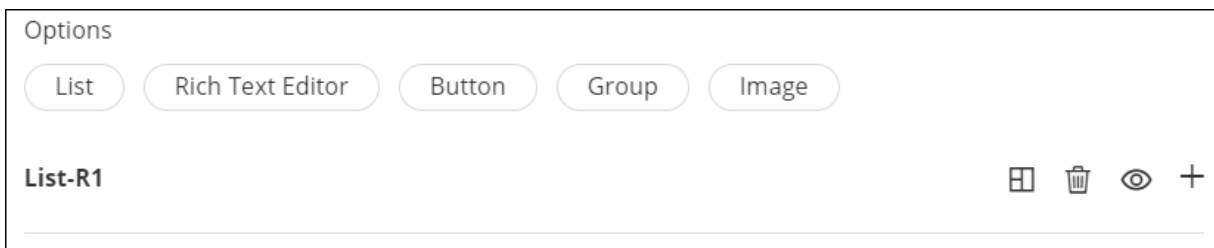
Field	Description
<p>Widget Name</p>	<p>Allows you to enter the name for the card widget. Styling options available for the Widget name are:</p> <ul style="list-style-type: none">  - Allows you to align the widget name to the left, right, center of the widget. <div data-bbox="418 1119 1624 1396" style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div>  /  - Allows you to show or hide the widget name.
<p>Select icon</p>	<p>Allows you to select an icon for the widget. Styling options available for the icon are:</p> <ul style="list-style-type: none">  - Allows you to align the icon to the left, right, or adjacent to the widget name. <div data-bbox="418 1644 1416 1858" style="border: 1px solid gray; padding: 5px; margin-top: 10px;">  </div>


Field	Description
	<ul style="list-style-type: none">  /  - Allows you to show or hide the icon.
Accordion	<ul style="list-style-type: none"> Turn this toggle on or off to hide or show large volumes of content in the card widget. Turning the toggle on displays options to select icons to Expand and Collapse the content in the card widget. Click  to align the Expand and Collapse icons to the left or right of the widget. 
Description	Allows you to add a description for the card widget.
Options	<p>Allows you to add the following components to the card widget:</p> <ul style="list-style-type: none"> List Rich Text Editor Button Group Image

Configuring Lists in the Card Widget


1. In the **Card** window, in the **Properties** tab, under **Options**, click **List**.

The **List** row is displayed.



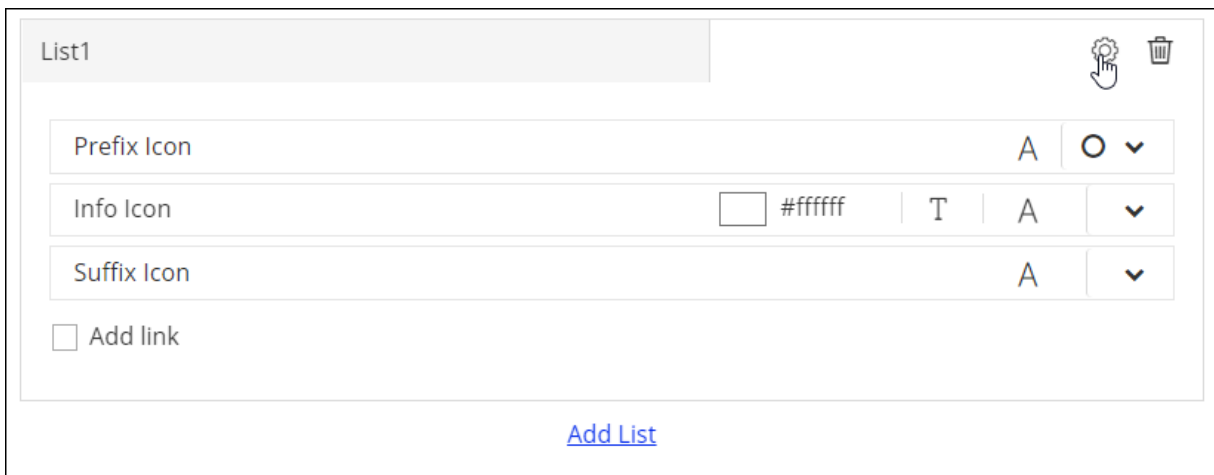
2. To expand the row and add a list, click  .

A new row is displayed with the default name as **List1**. You can rename this by typing over the existing name.





3. In the **List1** row, to configure the list, click .

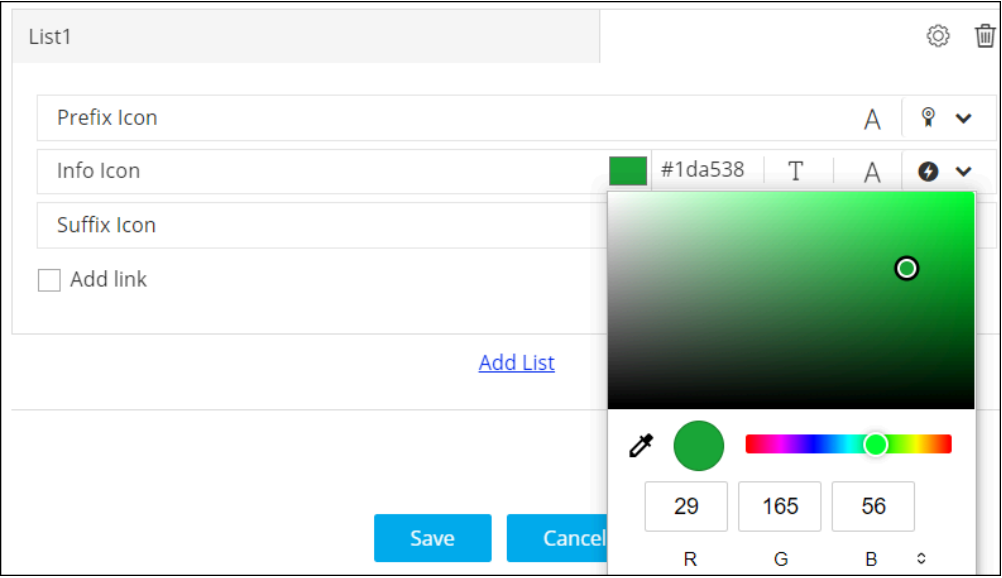



The following options are displayed as shown in the screenshot below.

- **Prefix Icon**
- **Info Icon**
- **Suffix Icon**
- **Add link**



The following table describes each option available here:

Option	Description
Prefix Icon	<ul style="list-style-type: none"> • To add a prefix icon next to the list name, click  and select the required icon from the options available. • To increase or decrease the size of the prefix icon, click  and set the icon size.
Info Icon	<ul style="list-style-type: none"> • To add an Info icon next to the list name, click  and select the required icon from the options available. • To increase or decrease the size of the Info icon, click  and set the icon size. • To select a color for the info icon, click the color picker box and select the required color.

Option	Description
	 <ul style="list-style-type: none"> • To add info text, click  and enter the text in the textbox.
Suffix Icon	<ul style="list-style-type: none"> • To add a suffix icon next to the list name, click  and select the required icon from the options available. • To increase or decrease the size of the suffix icon, click  and set the icon size.

4. To add a link for the list, select the **Add link** checkbox.

Option to add **Internal**, **Others** (External), and **Workflow** link (s) is displayed.



Note: For more information on adding **Internal** link(s), click [here](#).




Note: For more information on adding **Others** (External) link(s), click [here](#).

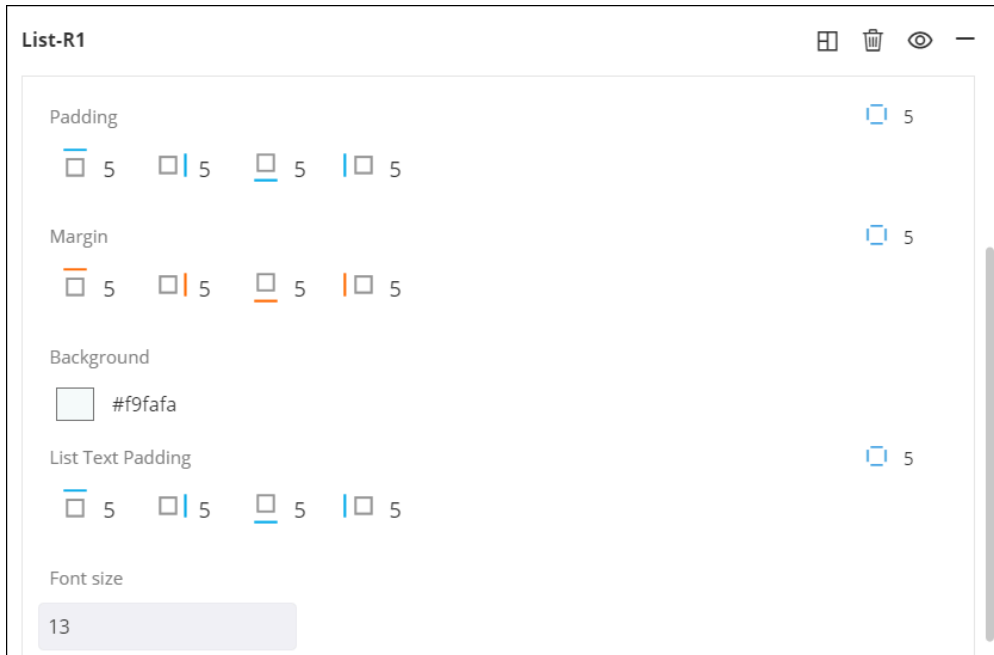


Note: For more information on adding **Workflow** link(s), click [here](#).

5. To hide the List row, click  . To display it again click  .

6. To delete the List row, click  .

7. To define the padding, margins, background color, and font size for the List within the card, click  .



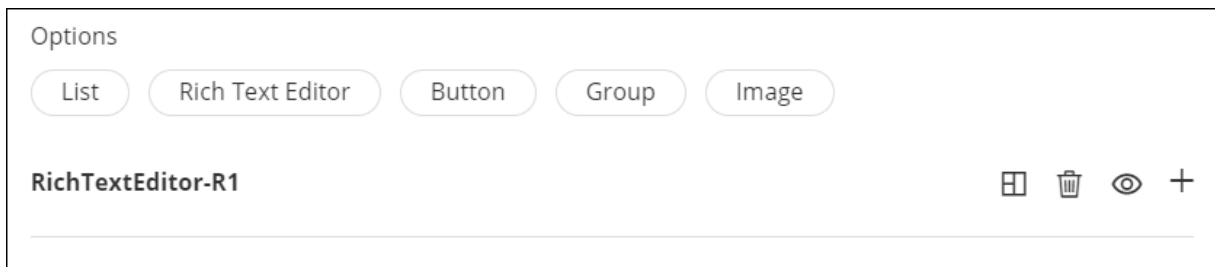
8. Once you have configured all the settings, click **Save**.

9. To add another list, click **Add List**.

Configuring Rich Text Editor in the Card Widget

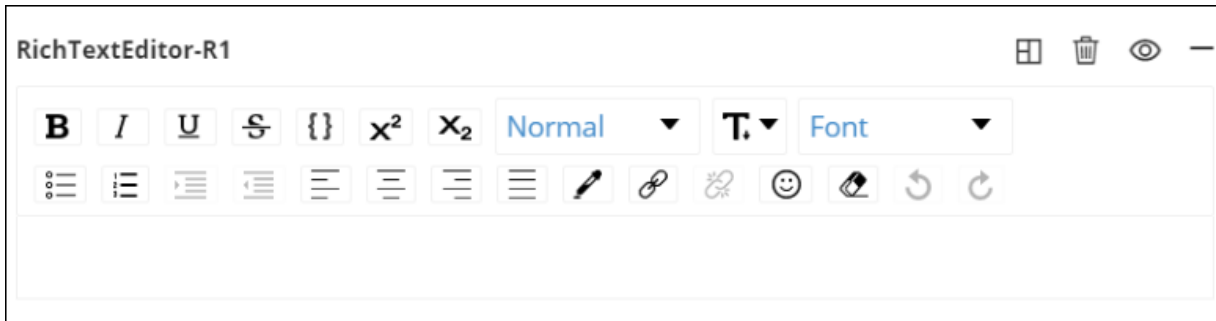
1. In the **Card** window, in the **Properties** tab, under **Options**, click **Rich Text Editor**.

The **List** row is displayed.







2. To expand the row and add a Rich Text Editor, click **+**.

The **Rich Text Editor** is displayed.



Note: For more information on the Rich Text Editor, click [here](#).

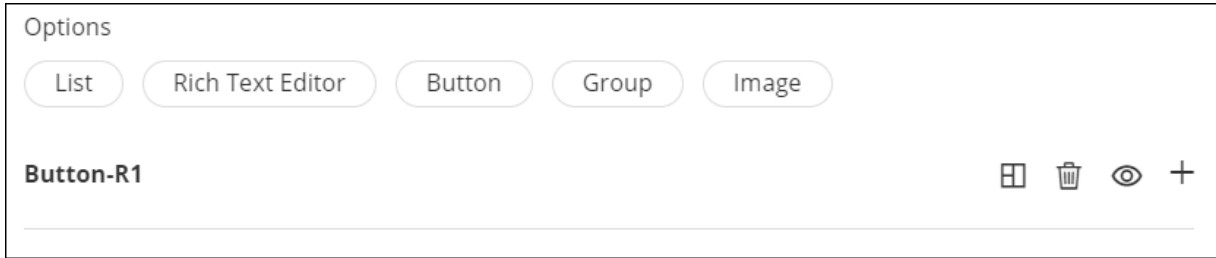
3. To hide the Rich Text Editor, click  . To display it again click  .
4. To delete the Rich Text Editor, click  .
5. To define the padding, margins, background color, and font size for the Rich Text Editor within the card, click  .



6. Once you have configured all the settings, click **Save**.

Configuring a Button in the Card Widget

1. In the **Card** window, in the **Properties** tab, under **Options**, click **Button**.
The **Button** row is displayed.



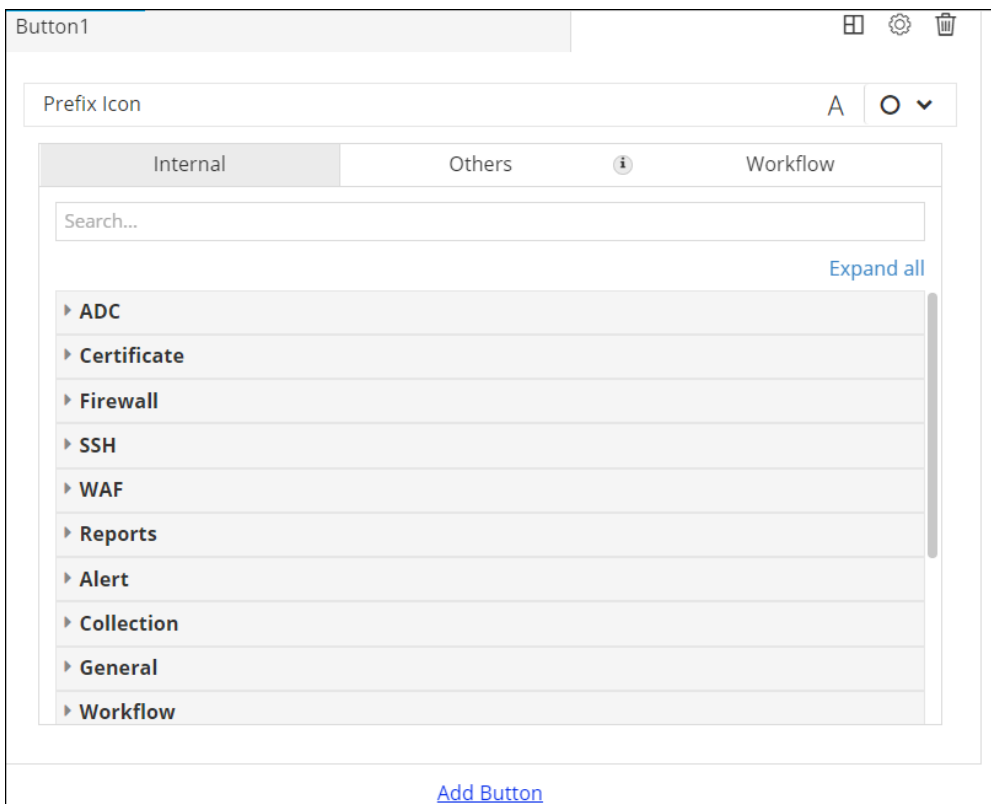
2. To expand the row and add a list, click **+**.

A new row is displayed with the default name as **Button1**. You can rename this by typing over the existing name.

3. In the **Button1** row, to configure the list, click .

The following options are displayed as shown in the screenshot below:

- **Prefix Icon** - To add a prefix icon next to the Button click and select an icon from the options available. To change the size of the icon, click .
- **Add link** - Allows you to add **Internal**, **Others** (External), and **Workflow** link(s) for the Button.





Note: For more information on adding **Internal** link(s) to a Button, click [here](#).




Note: For more information on adding **Others** (External) link(s) to a Button, click [here](#).

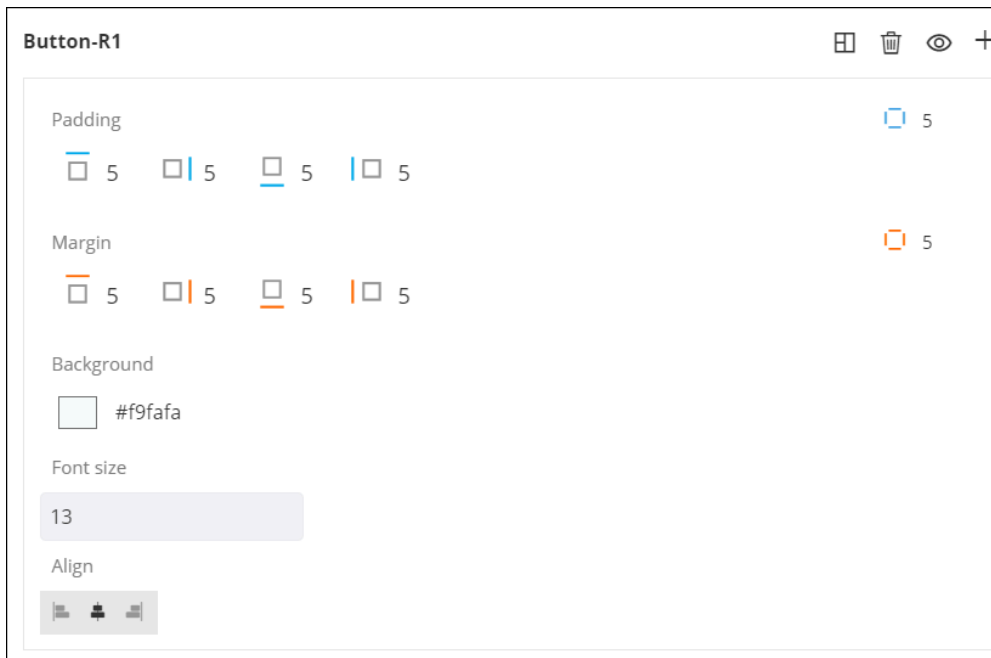


Note: For more information on adding **Workflow** link(s) to a Button, click [here](#).

4. To hide the Button row, click  . To display it again click  .

5. To delete the Button row, click  .

6. To define the padding, margins, background color, font size, and alignment for the Button within the card, click  .



7. Once you have configured all the settings, click **Save**.

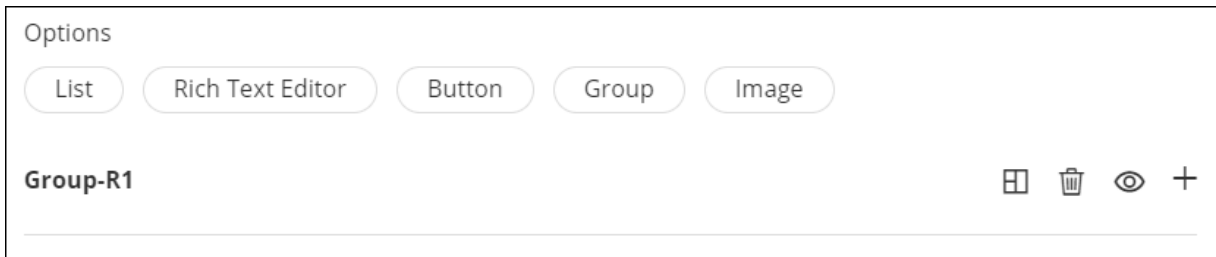
8. To add another button click **Add Button**.

Configuring Grouping in the Card Widget

This feature allows you to group card elements such as list(s), rich text editor, and button(s) within a group.

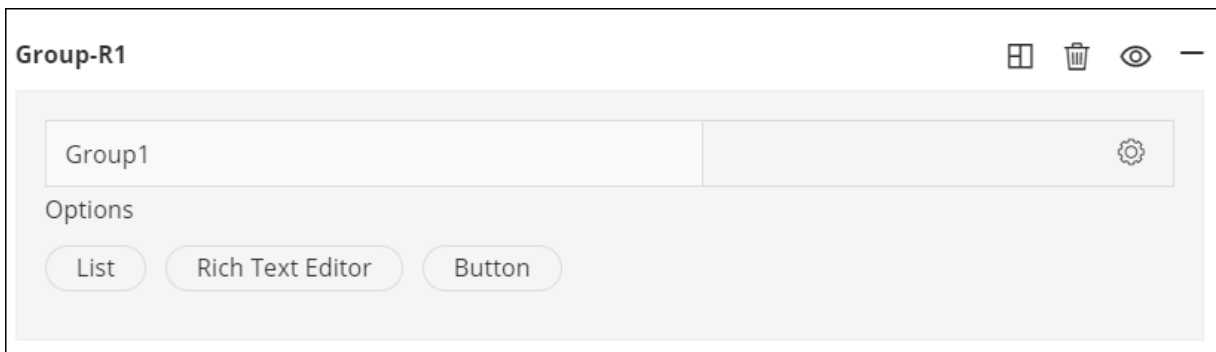
1. In the **Card** window, in the **Properties** tab, under **Options**, click **Group**.


The **Group** row is displayed.



2. To expand the row and add a list, click **+**.

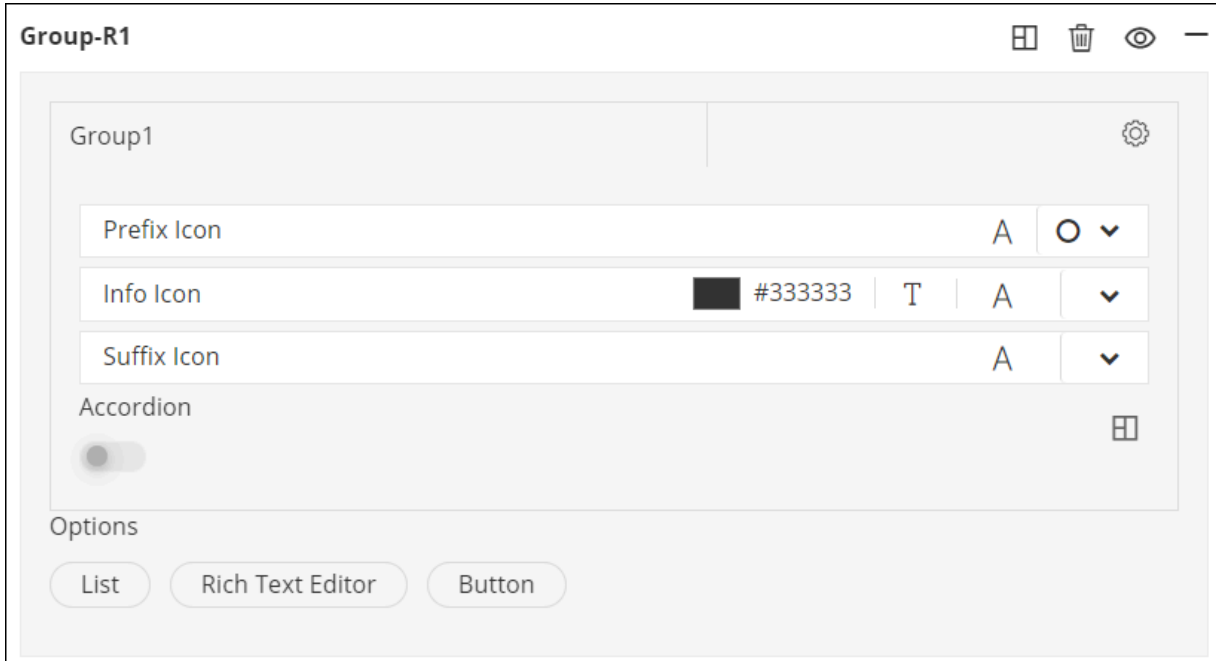
A new row is displayed with the default name as **Group1**. You can rename this by typing over the existing name.







3. In the **List1** row, to configure the list, click .

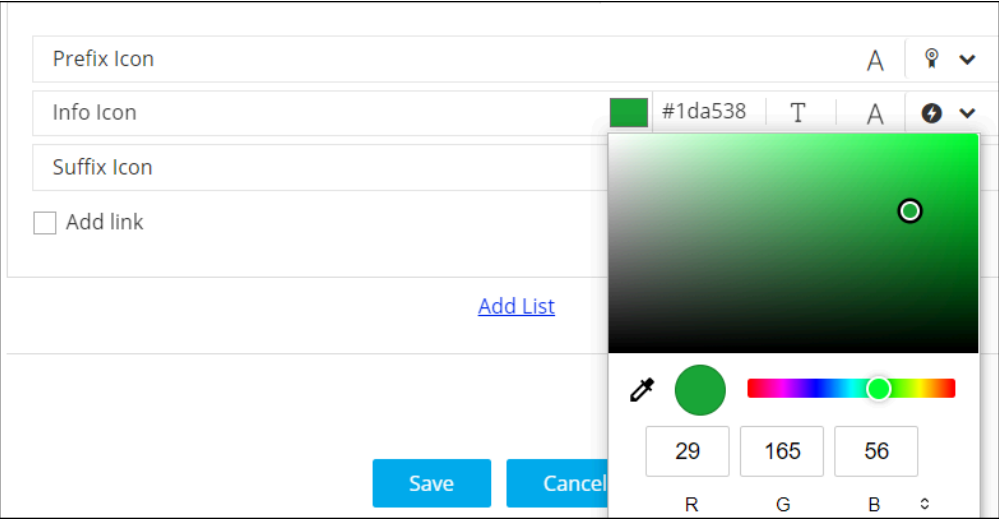
The following options are displayed as shown in the screenshot below.

- **Prefix Icon**
- **Info Icon**
- **Suffix Icon**
- **Accordion**



The following table describes each option available here:

Option	Description
Prefix Icon	<ul style="list-style-type: none"> To add a prefix icon next to the list name, click  and select the required icon from the options available. To increase or decrease the size of the prefix icon, click  and set the icon size.
Info Icon	<ul style="list-style-type: none"> To add an Info icon next to the list name, click  and select the required icon from the options available. To increase or decrease the size of the Info icon, click  and set the icon size. To select a color for the info icon, click the color picker box and select the required color.

Option	Description
	 <ul style="list-style-type: none"> • To add info text, click T and enter the text in the textbox.
Suffix Icon	<ul style="list-style-type: none"> • To add a suffix icon next to the list name, click ▼ and select the required icon from the options available. • To increase or decrease the size of the suffix icon, click A and set the icon size.
Accordion	<p>Allows you to hide or show large volumes of content in the card widget by turning this toggle on or off. You can select icons to Expand and Collapse the content in the card widget and also set the placement of these icons.</p>

4. To add a **List**, **Rich Text Editor**, or **Button** in the Group, click on the respective link under **Options**.



Note: For steps on configuring a list, click [here](#).



Note: For steps on configuring a Rich Text Editor, click [here](#).

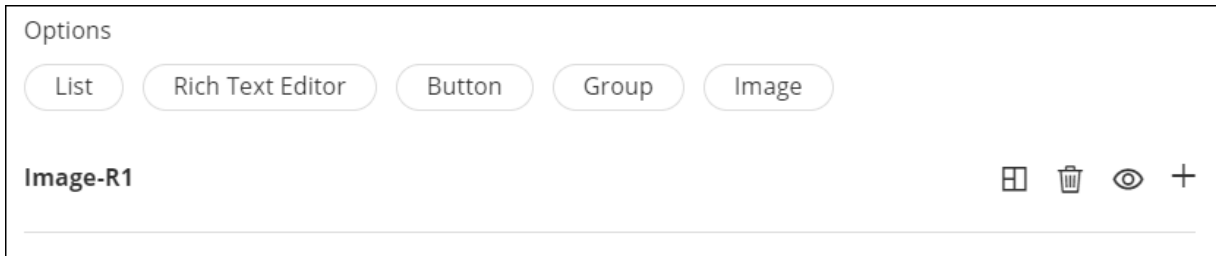




Note: For steps on configuring a Button, click [here](#).

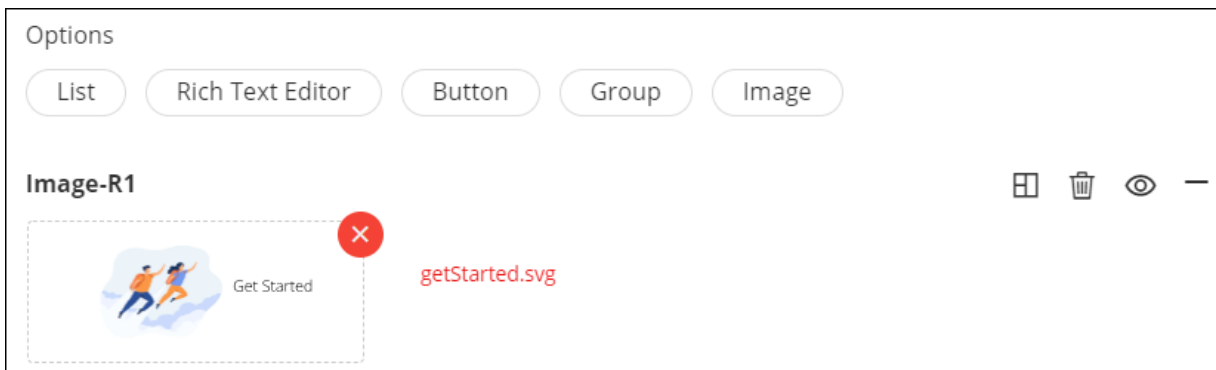
Configuring Images in the Card Widget

1. In the **Card** window, in the **Properties** tab, under **Options**, click **Image**.


The **Image** row is displayed.



2. To expand the row and add an image, click .
3. To upload an image in the card widget, click  and upload the required image from your computer.

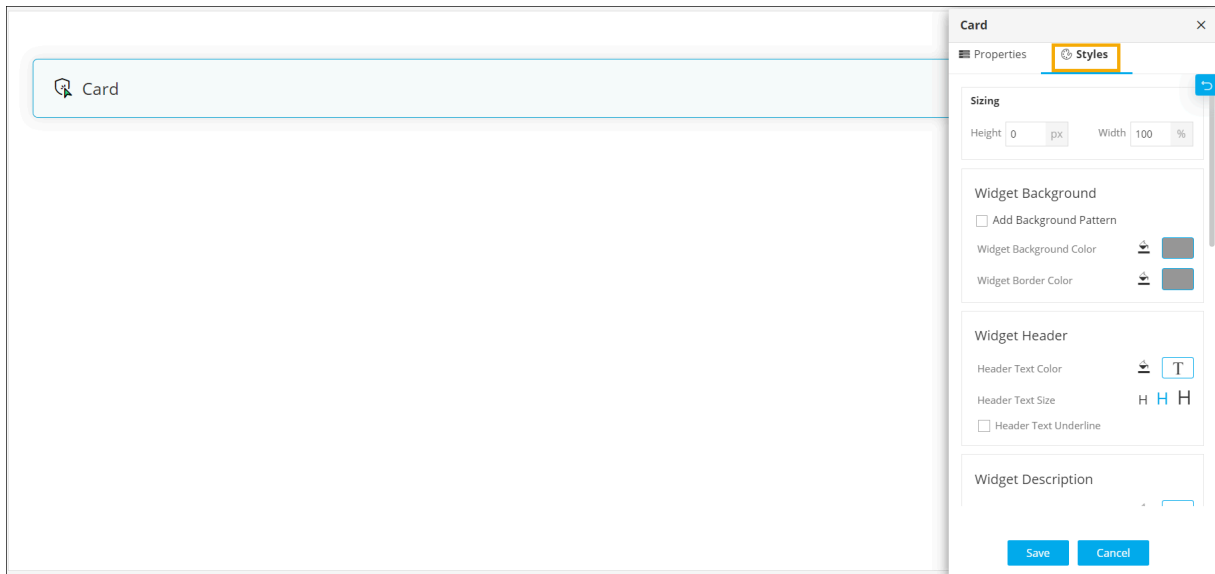


Note: Allowed image formats are: .svg, .jpeg, and .png

4. To delete this image and select another, click .
5. To add another image, under **Options**, click **Image**.
A new **Image** row is displayed.
6. Once you have added the required image(s), click **Save**.

Configuring the Card - Styles

1. For more options to customize the Card component, in the **Card** window, click **Styles**.




The following table describes the options available under the **Styles** tab:

Option	Description
Sizing	Allows you to increase/decrease the height and width of the widget.
Widget Background	The following options are available here: <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	The following options are available here: <ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Widget Description	The following options are available here: <ul style="list-style-type: none"> • Label text Color: Allows you to change the color of the label text. • Label Text Size: Allows you to select the size of the label text.
Icon Style	Allows you define the following style settings:

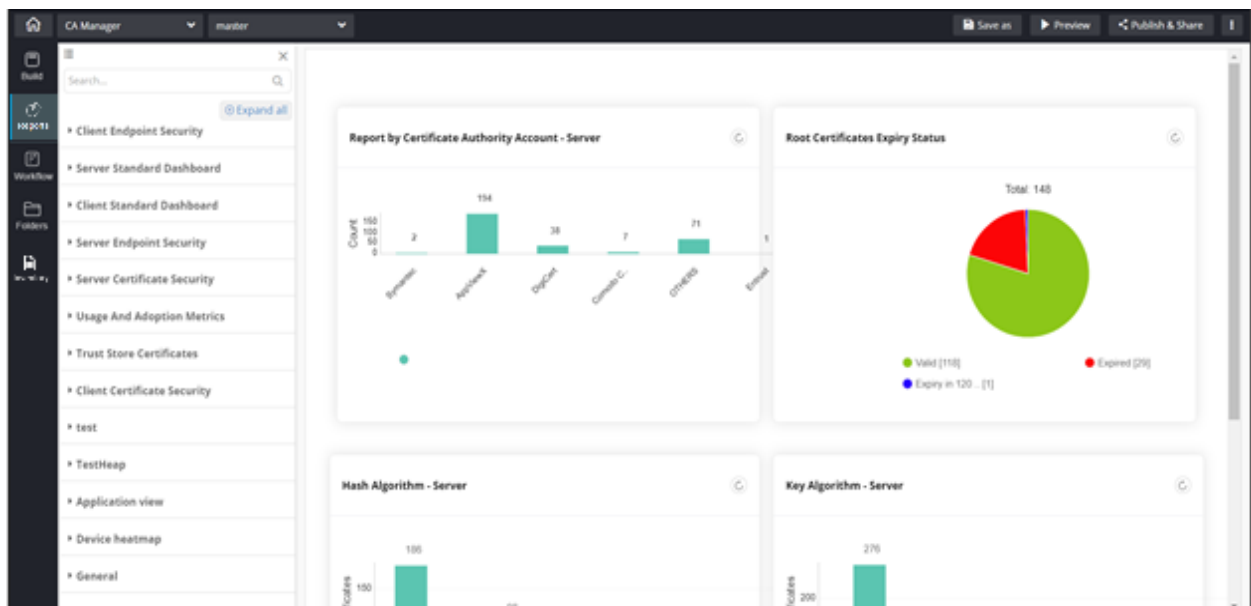
Option	Description
	<ul style="list-style-type: none"> • Icon Color - You can select the color for the icon from the available options. • Icon Background - You can select the background for the icon from the available options. • Icon Background Color - You can select the background color for the icon from the available options.
Widget Layout Style	Allows you to define the padding and margin of the Card widget.

2. To save your settings, click **Save**.

3. To restore the settings under **Styles** to default, click 

Reports

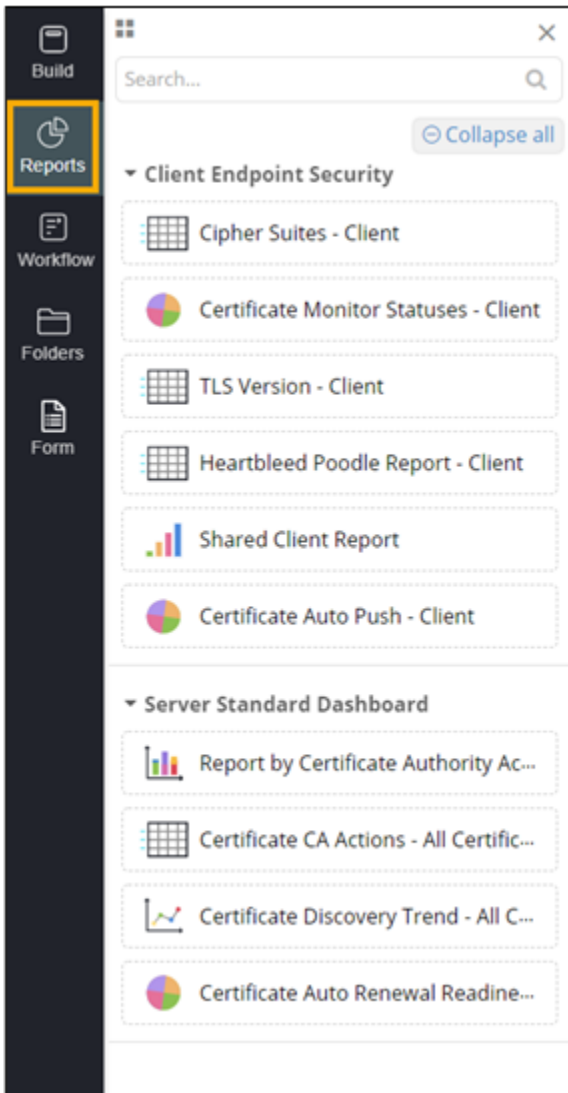
Self-service Pages module allows you to access specific reports based on user roles. It enables you to view all reports on a single page.



Note: To access the Reports module in AppViewX, navigate to **Studio > Reports**. For more information on Reports, refer to the Reporting User Guide.

To access Reports in Page builder:

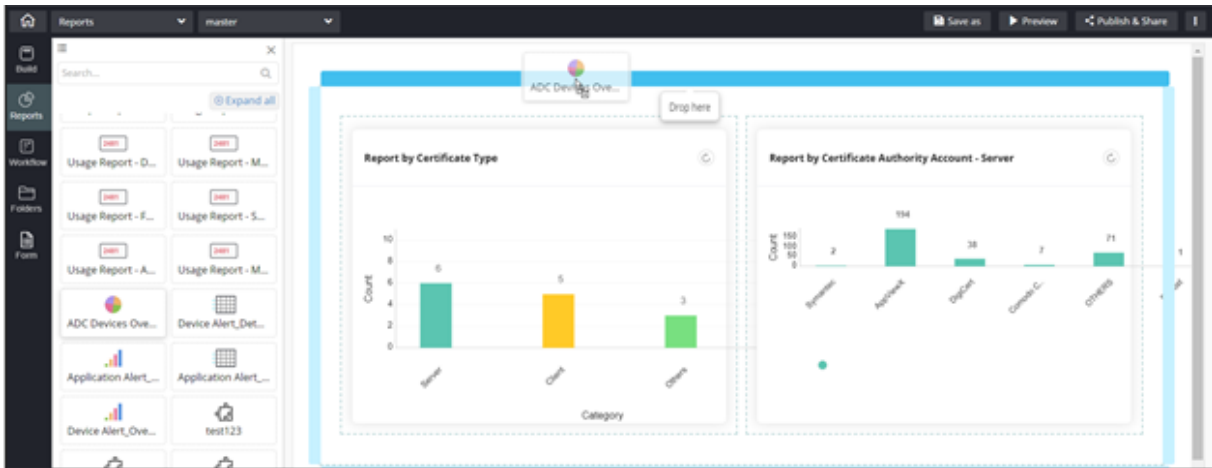
1. From the component panel on the left, click **Reports**.
The Report inventory is displayed.



This table describes the options present in the **Reports** section:

Options	Description
View	Allows you to switch between list view and grid view when the Reports Inventory is expanded.
Search bar	Allow you to search for a specific report.
Collapse All/ Expand All	Allows you to expand/collapse the Reports inventory.

2. To add a report to your page, drag and drop the report to any blue highlighted space in the build area.




3. To configure Report Properties, click [here](#).

4. To configure Report Styles, click [here](#).

- [Configuring Reports - Properties](#)
- [Configuring Reports - Styles](#)
- [Pinning Application Widgets](#)
- [Pinning Device heatmap Widget](#)

Configuring Reports - Properties

1. To configure/edit the **Reports** component, hover your mouse over the widget and click .




The **Report widget** window opens with the **Properties** tab open by default.

The 'Report widget' configuration window shows the following settings:

- Report Widget Header:** Report by Certificate Type
- Report List:** Sample Report Bar

Buttons for 'Save' and 'Cancel' are visible at the bottom of the configuration window.

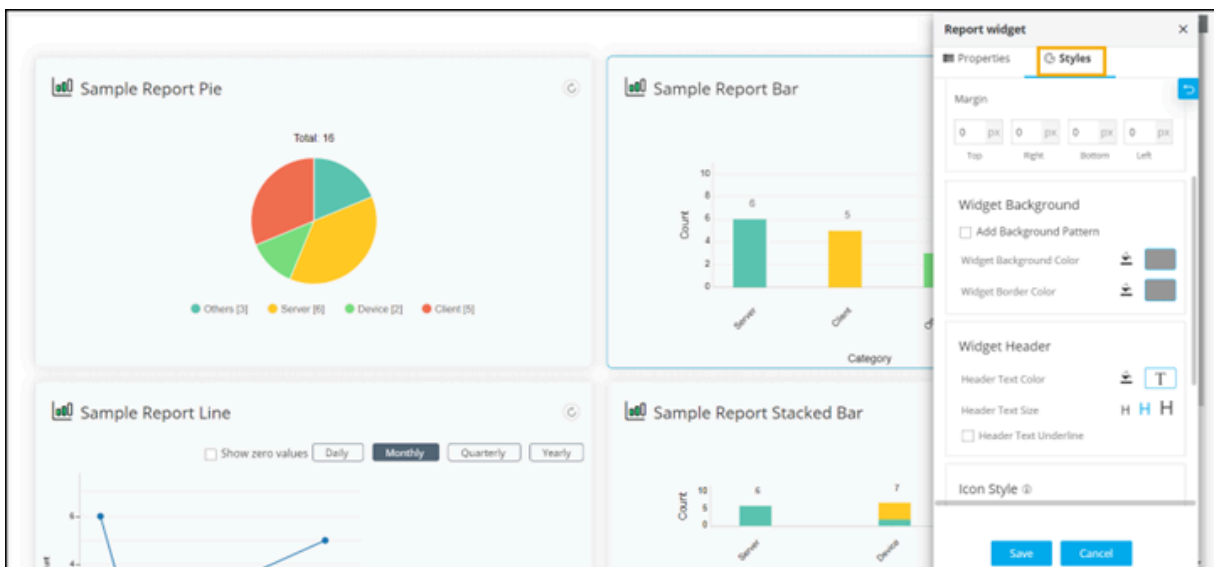
- In the **Report widget** window, under **Properties**, enter or select the required field information.
The following table describes the options available under the **Properties** tab:

Field	Description
Report Widget Header	Allows you to provide a name for the Report Widget.
Report List	Allows you to select reports from the options available in the dropdown. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; background-color: #E6F2FF;"> <p> Note: Selecting a report from this dropdown will replace the existing report on the page.</p> </div>

- Click **Save**.

Configuring Reports - Styles


- For more options to customize the **Report widget**, in the **Report widget** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Sizing	Allows you to increase/decrease the Size of the Report widget.
Spacing	Allows you to set the Padding and Margin of the Report widget header.

Field	Description
Widget Background	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Add Background Pattern: To add a background pattern to the widget, select the Add Background Pattern checkbox and select a pattern from the available options. • Widget Background Color: To add a background color to the widget, unselect the Add Background Pattern checkbox and select the color from the color palette. • Widget Border Color: Allows you to change the color of the widget border.
Widget Header	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Header Text Color: Allows you to change the color of the header text. • Header Text Size: Allows you to select the size of the header text. • Header Text Underline: To underline the header text, select the Header Text Underline checkbox.
Icon Style	<p>The following options are available here:</p> <ul style="list-style-type: none"> • Icon Color - Select the Icon Color from the available options. • Icon Background - Select the Icon Background from the available options. • Icon Background Color - Select the Icon Background Color from the available options.

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

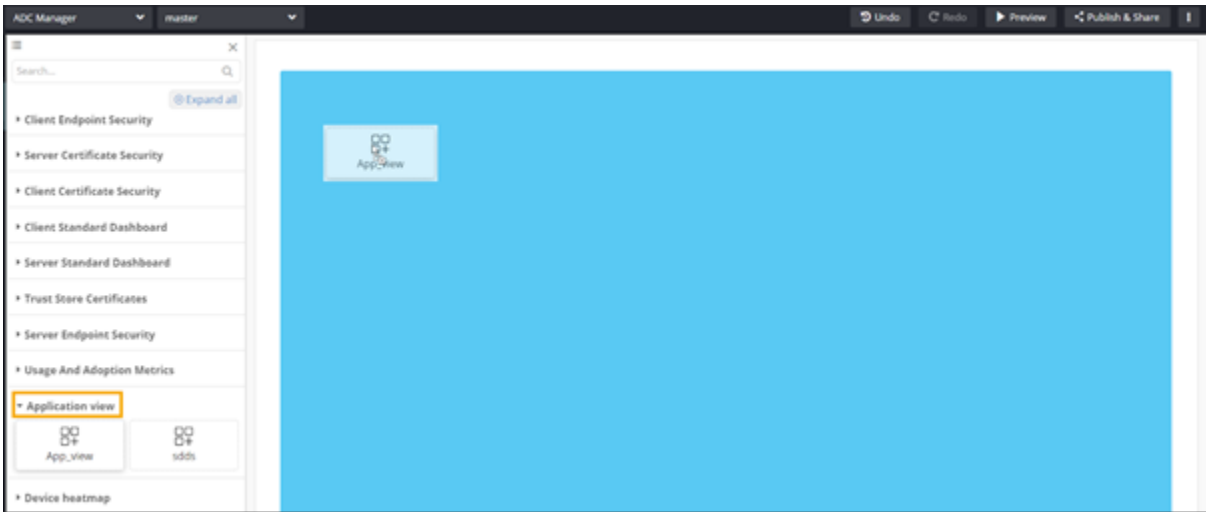
Pinning Application Widgets

Through the self-service Pages, you can pin Application view and Device HeatMap widgets to your page. To be able to pin these widgets to your page, they must be configured on the ADC dashboard first.

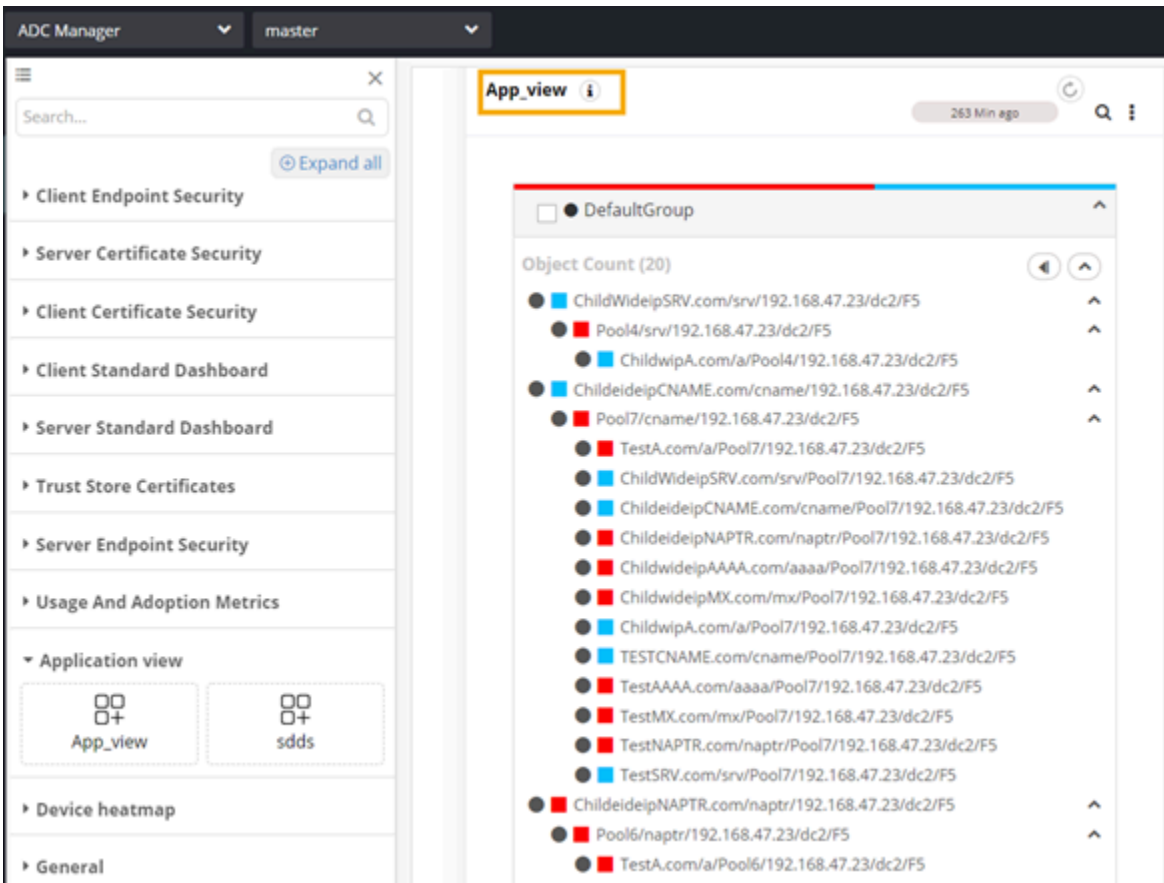
The Application View widget displays all the configured devices in your database. Through the widget you can also perform actions such as enabling/disabling a device, view logs and alerts, backup and restore and so on.


To pin the Application view widget to your page:

1. From the component panel on the left, click **Reports**.
2. Under **Application view**, drag and drop the widget that you want to pin to the page.



The **App_view** widget displays all the devices configured in the database.

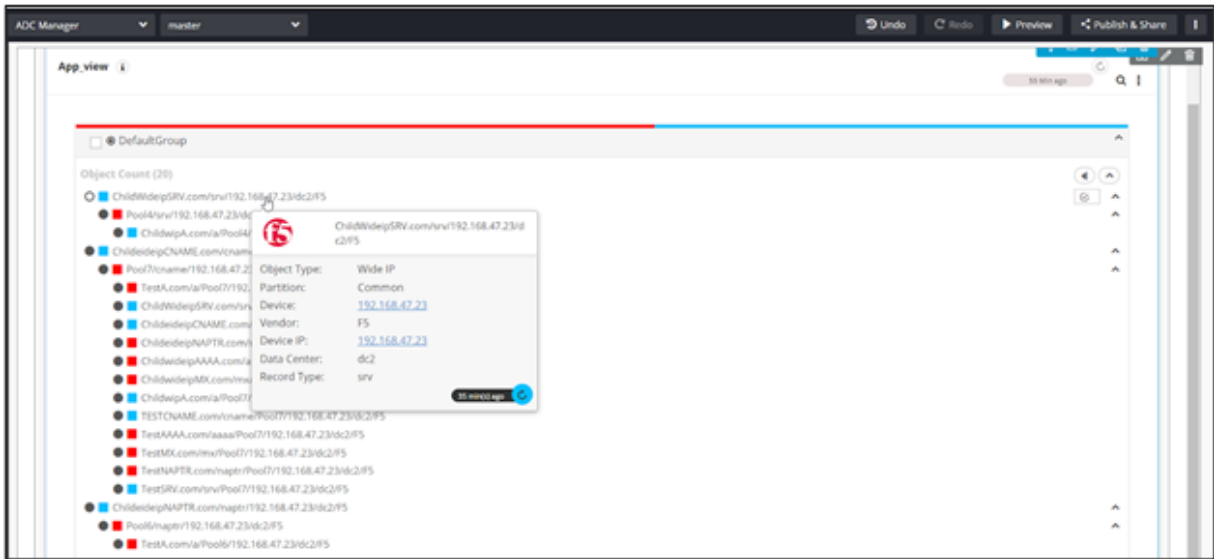


3. To modify the widget, hover your mouse over the top right corner of the widget and click .

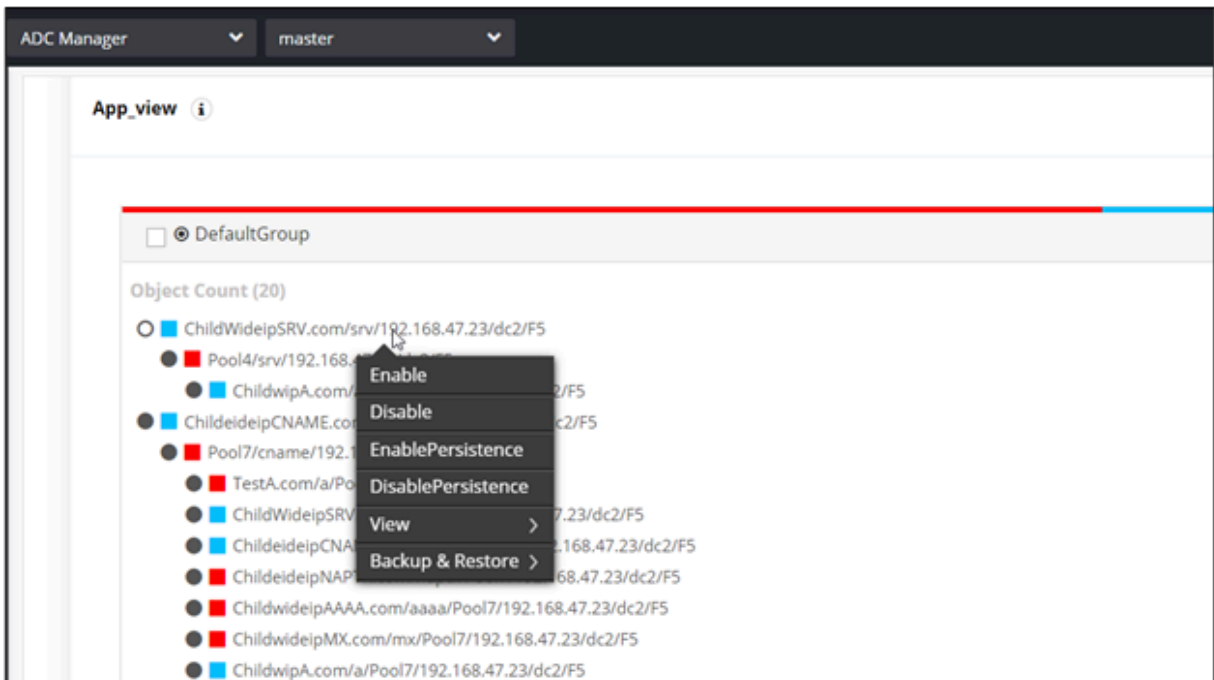



Note: For more information on configuring the Report widget, click [here](#).

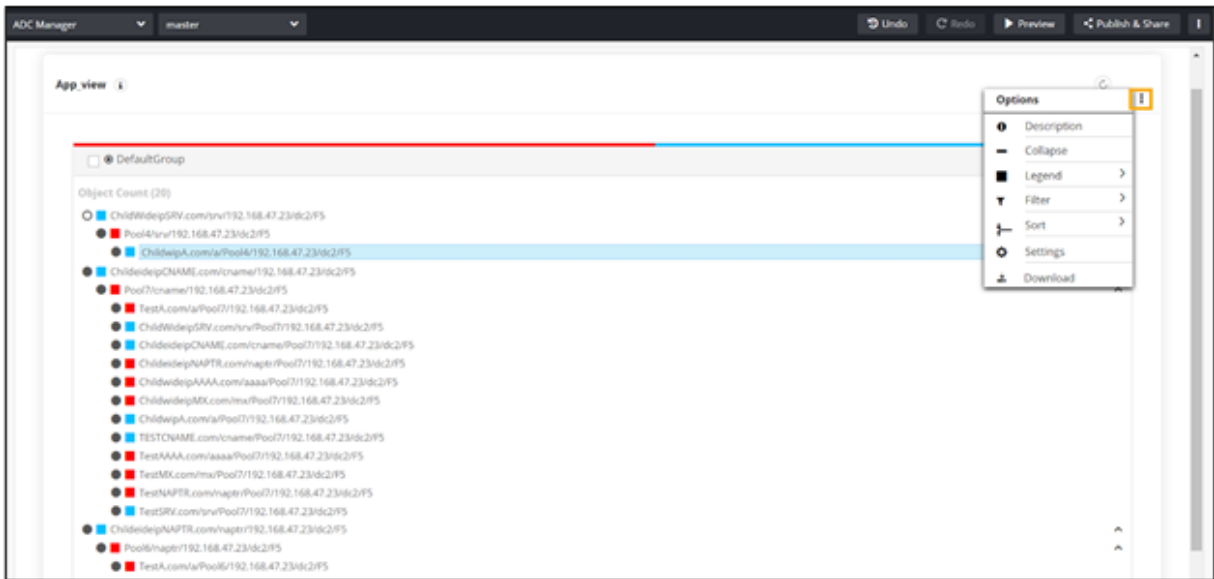
4. To view details about any device, hover your mouse over the device name.



5. To see the list of actions that can be performed on these devices, right-click on a device name.



- To see the list of available options for the App_view widget, from the top right corner of the widget, click .

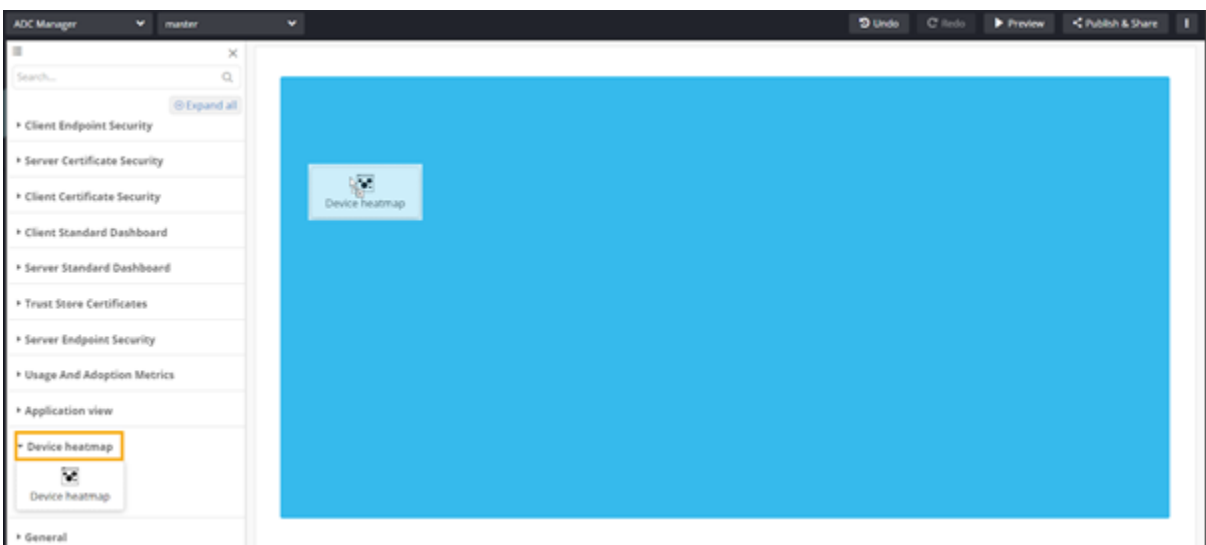


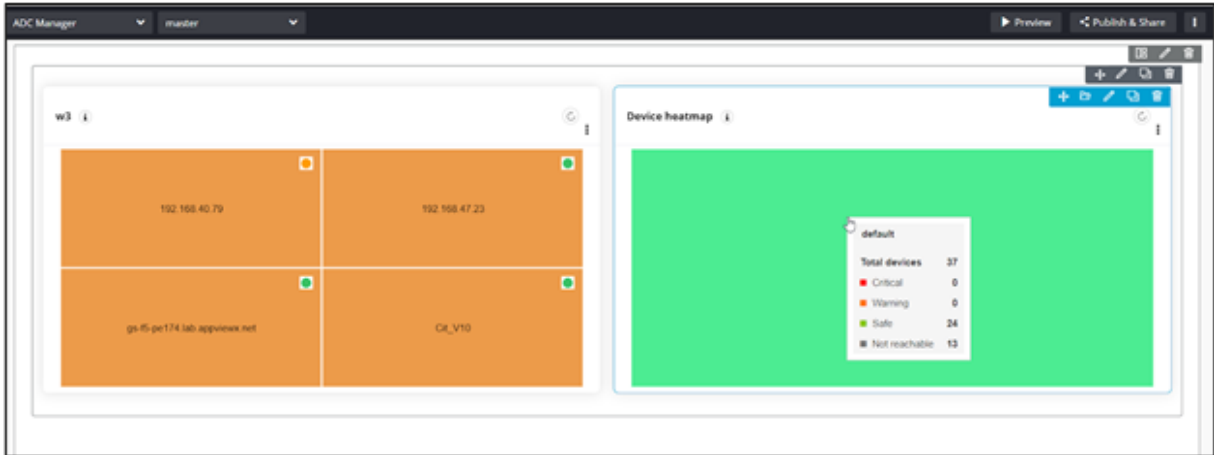
Pinning Device heatmap Widget


The **Device heatmap** widget shows a color-coded status of your configured devices.


To pin the **Device heatmap** widget to your page:


- From the component panel on the left, click **Reports**.
- Under **Device heatmap**, drag and drop the widget that you want to pin to the page.






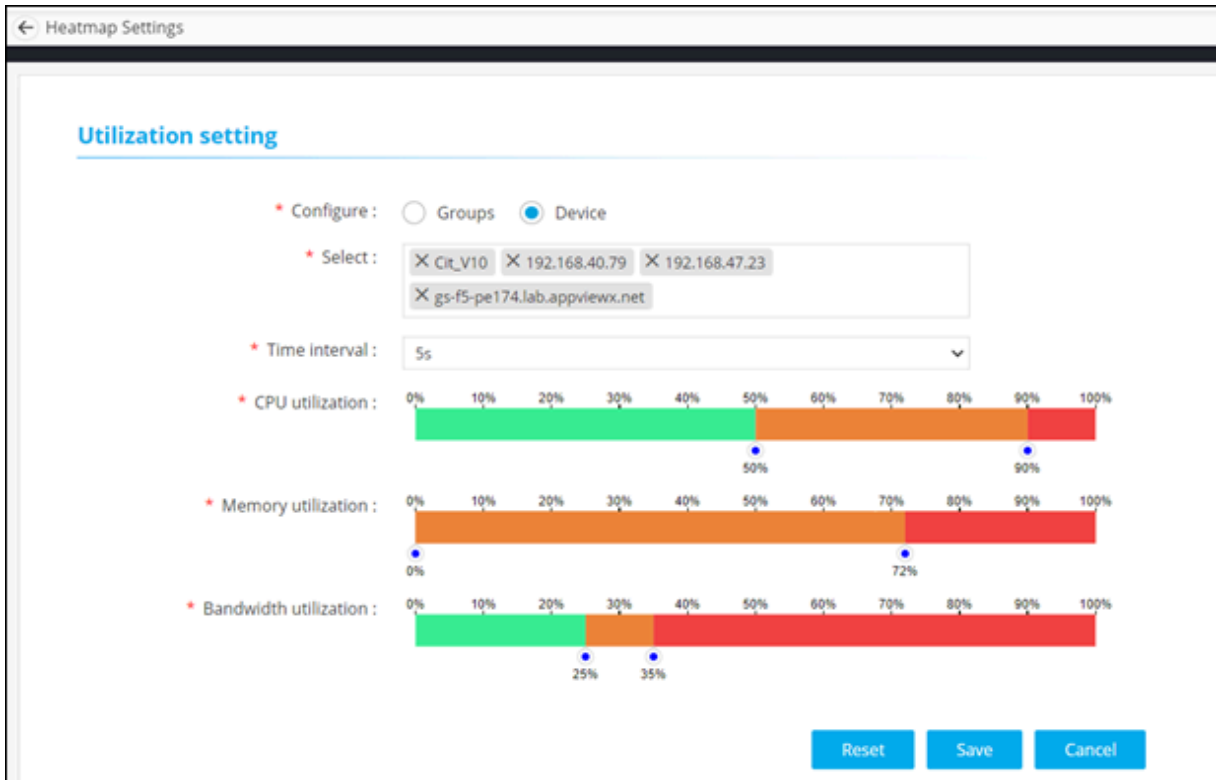
- To modify the widget, hover your mouse over the top right corner of the widget and click .

 **Note:** For more information on configuring the Report widget, click [here](#).

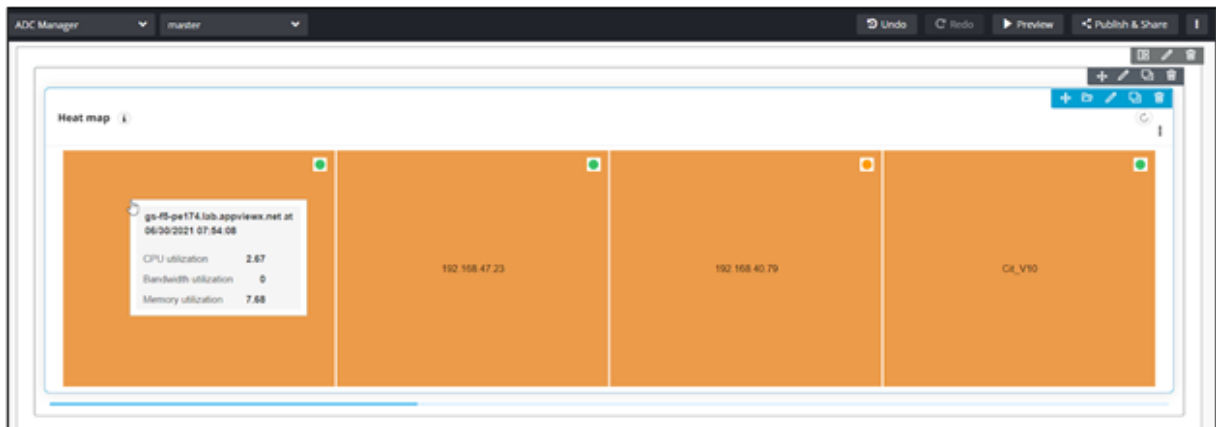
- To modify the widget settings, from the top right corner of the widget, click .
- From the options, select **Settings**.



 **Note:** You can configure devices and groups and other settings here.

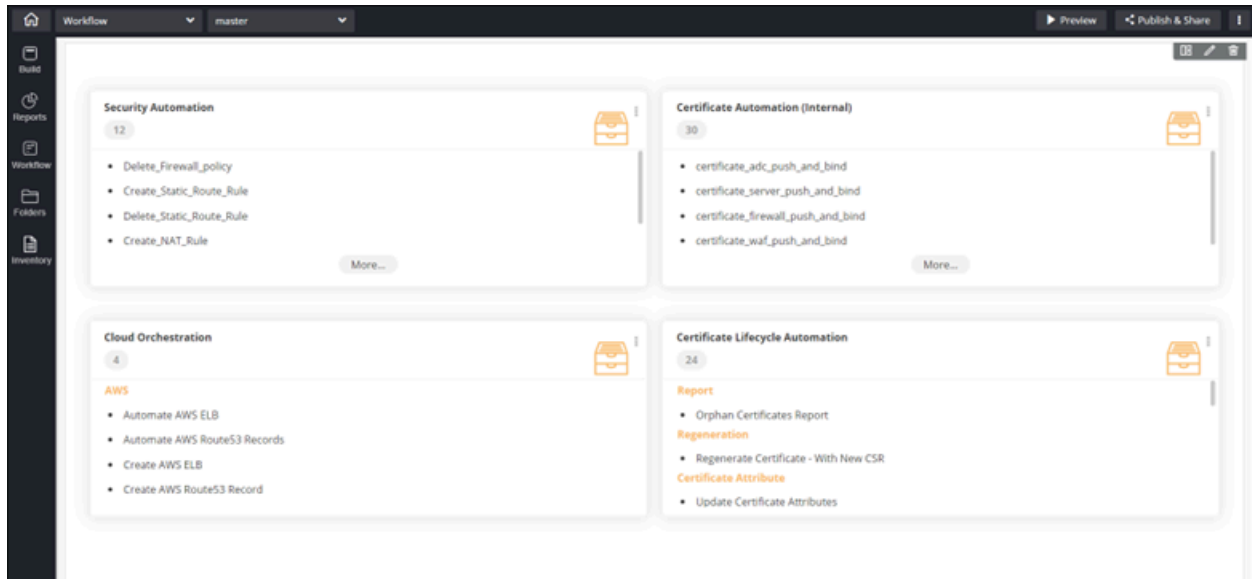


6. For details about a particular device on the heat map, hover your mouse over the device.



Workflow

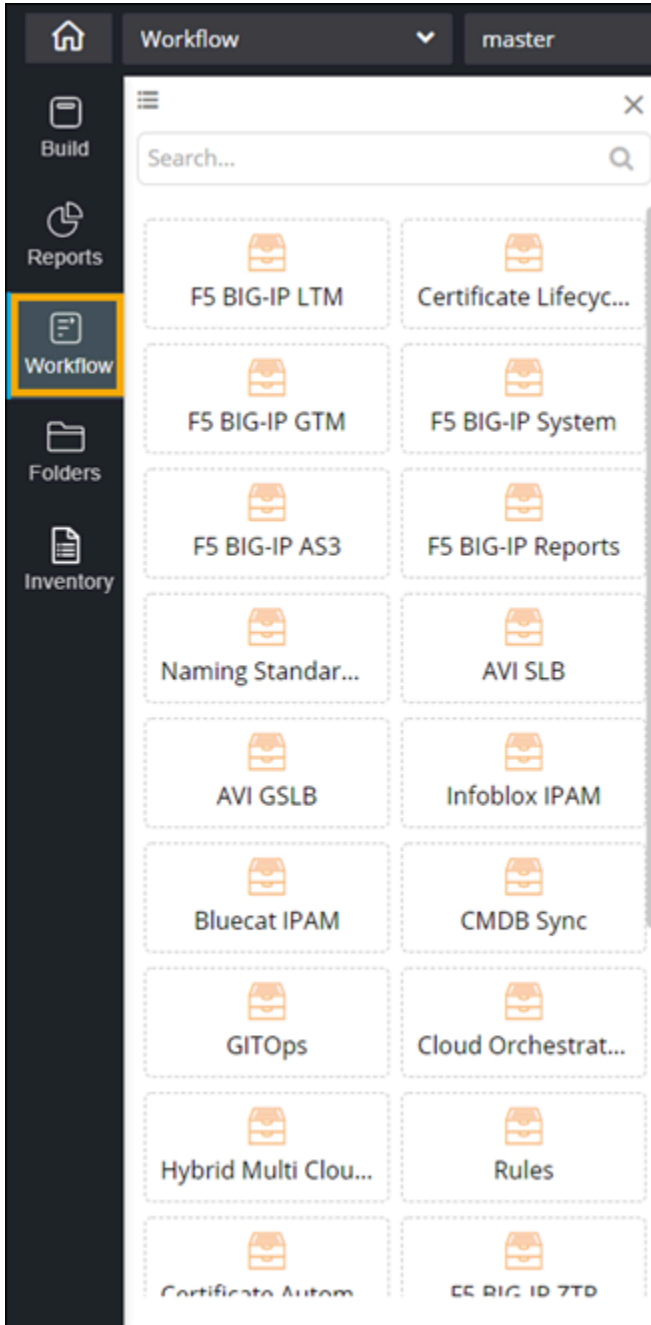
The Workflow component allows you to use the self-service Pages to execute automation workflows by persona. You can logically select and group workflows such as CLM Automation, Application Delivery and so on.




To access workflow catalogs in the Page builder:

1. From the component panel on the left, click **Workflow**.

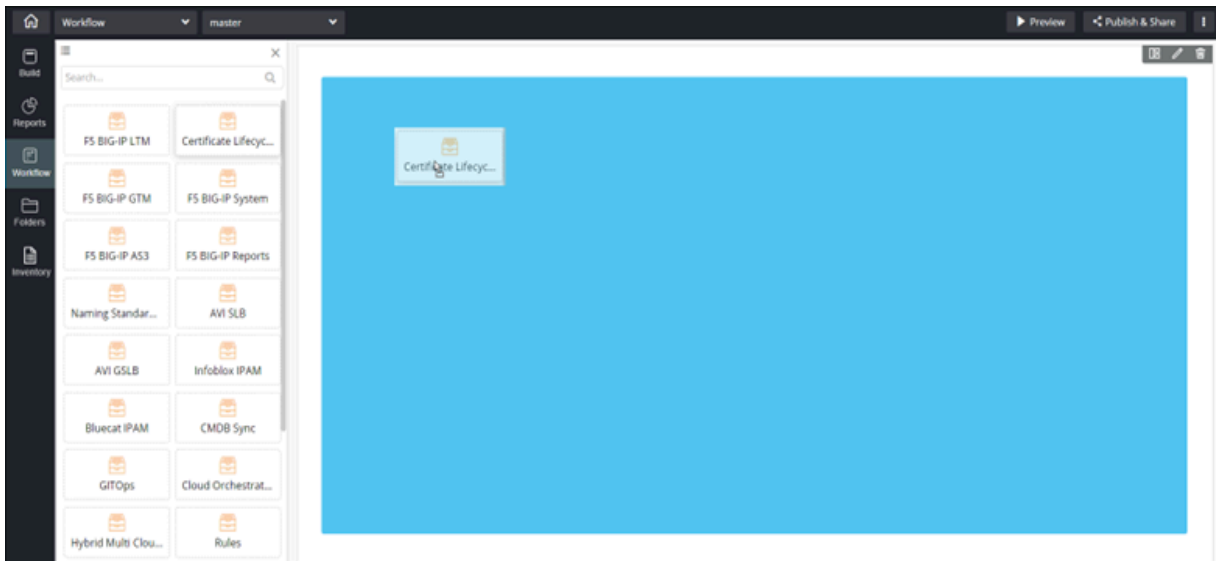
A list of available workflow catalogs is displayed.



This table describes the options present in the **Workflow** section:

Field	Description
	Allows you to switch between list view and grid view of the Workflow catalogs.
Search bar	Allows you to search for a specific workflow catalog.


- To add a workflow catalog to your page, drag and drop the selected workflow to any blue highlighted space in the build area.

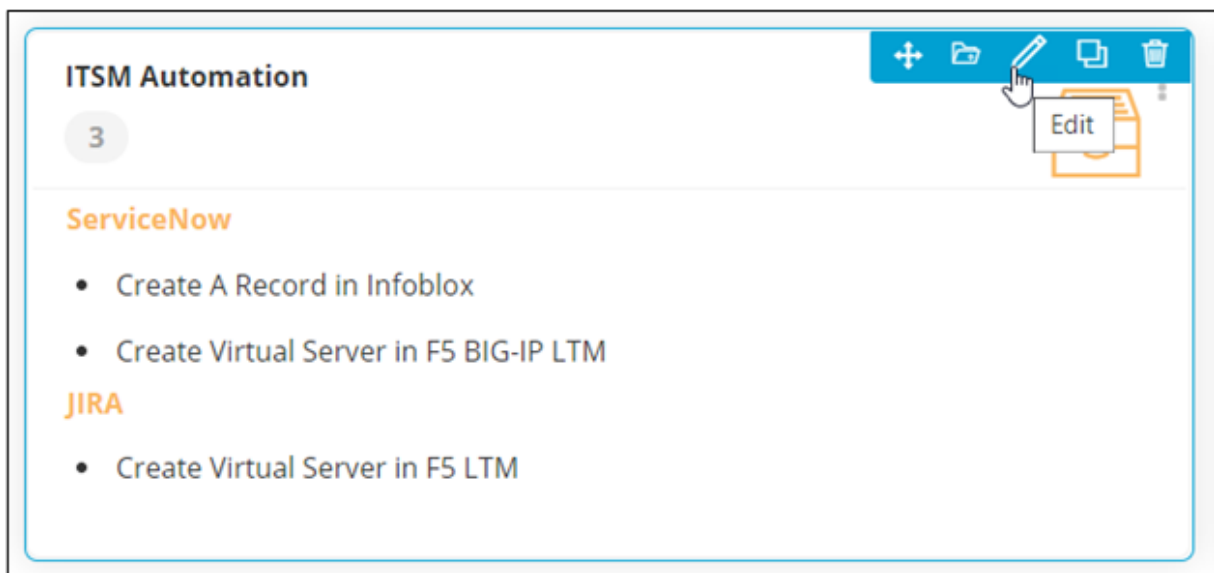


- To configure Workflow Properties, click [here](#).
- To configure Workflow Styles, click [here](#).

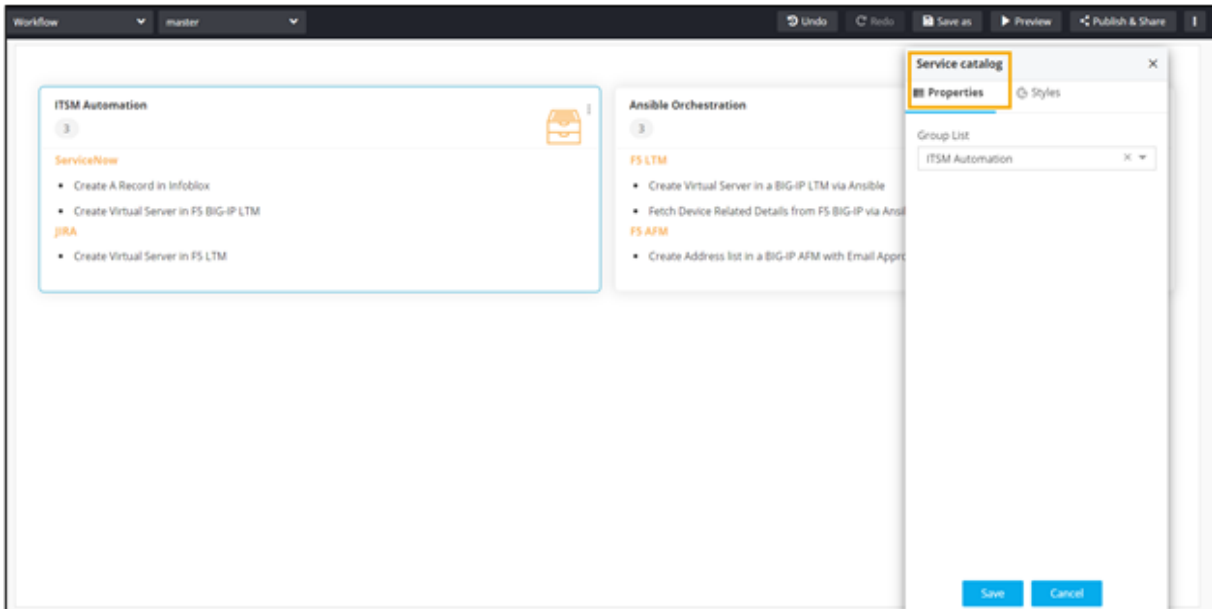
- [Configuring Workflow - Properties](#)
- [Configuring Workflow - Styles](#)

Configuring Workflow - Properties

- To configure/edit the **Workflow** component, hover your mouse over the widget and click .



The **Service Catalog** window opens with the **Properties** tab open by default.



2. In the **Service catalog** window, under **Properties**, select a workflow catalog from the **Group List** dropdown.

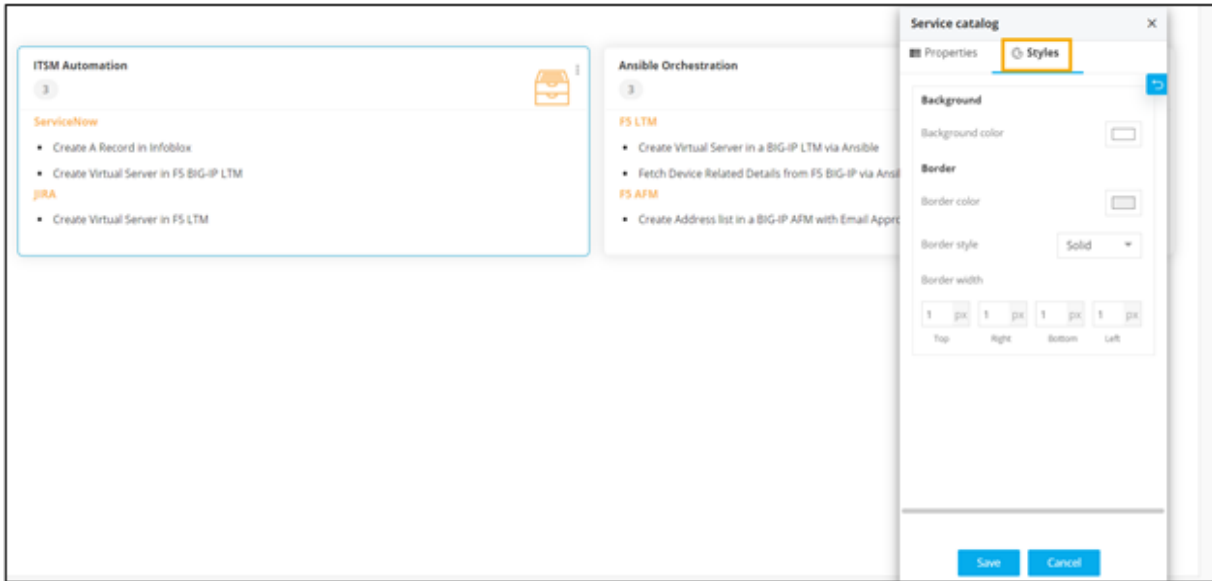


Note: The selected catalog will replace the catalog existing on the page.

3. Click **Save**.

Configuring Workflow - Styles

1. For more options to customize the **Workflow** widget, in the **Service catalog** window, click **Styles**.

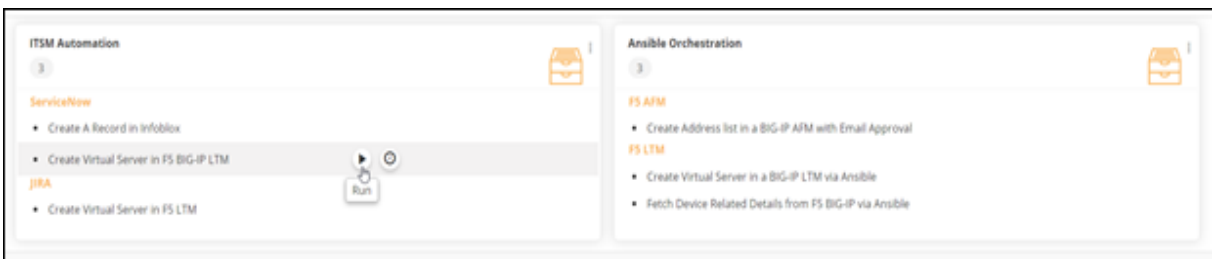



The following table describes the options available under the **Styles** tab:


Option	Description
Background	Allows you to set the background color of the workflow widget.
Border	Allows you to define the <ul style="list-style-type: none"> • Border color - Set the color of the Workflow widget's border. • Border style - Set the border style for the Workflow widget from the options available in the dropdown. • Border width - Set the thickness of the Workflow widget's border.

2. To trigger or schedule workflows from your page, click **Preview**.

A preview of the page opens in a new tab.



3. To trigger a workflow click .

4. To schedule a workflow, click .



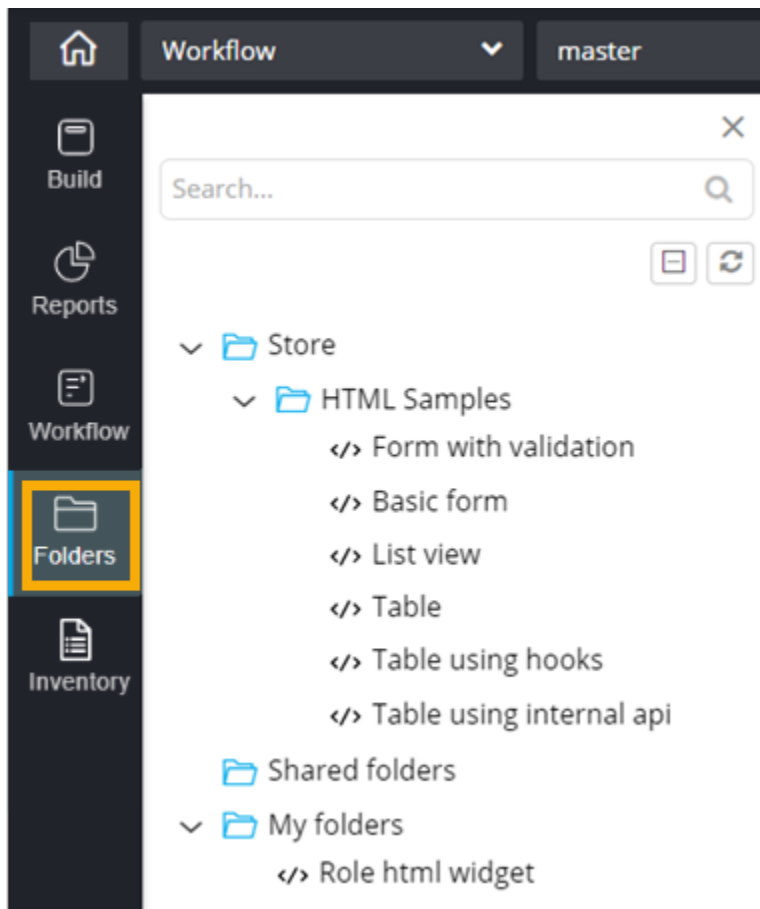
Note: For more information on workflows, refer to the Visual Workflow User Guide.

Folders



Self-service Pages module allows you to reuse widgets by saving them in Folders. The Folders section also provides sample HTML scripts. Folders enable reusability of elements across multiple users thereby saving time.

To access a folder:

The **Folders** can be accessed from the component panel on the left.



This table describes the options present in this section:


Option	Description
Search bar	Allows you to search for a specific folder, widget or sample HTML script by typing keyword(s) in the search field.
	Allows you to toggle between expanded and collapsed views of the folders.
	Refresh the folders inventory.

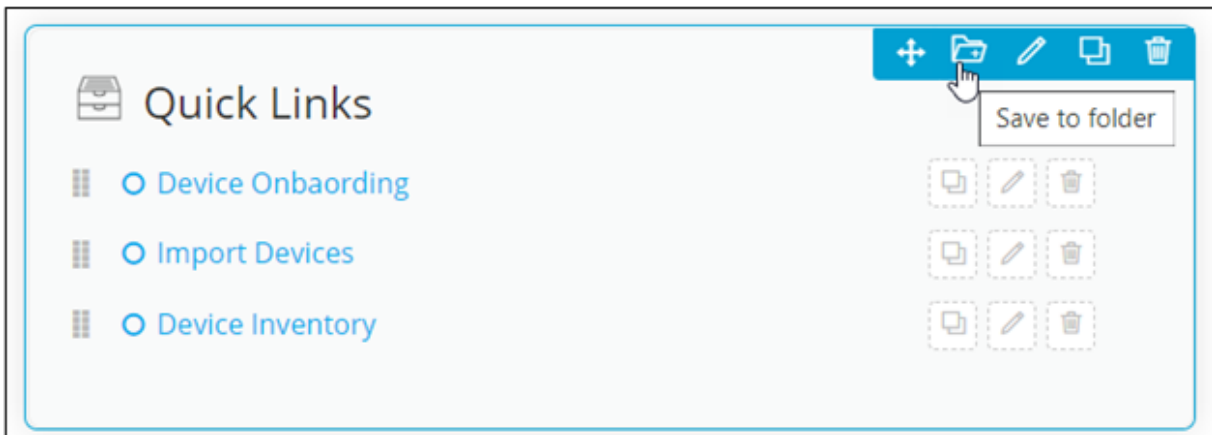
- [Saving a widget in Folders](#)
- [Deleting Folders](#)

Saving a widget in Folders

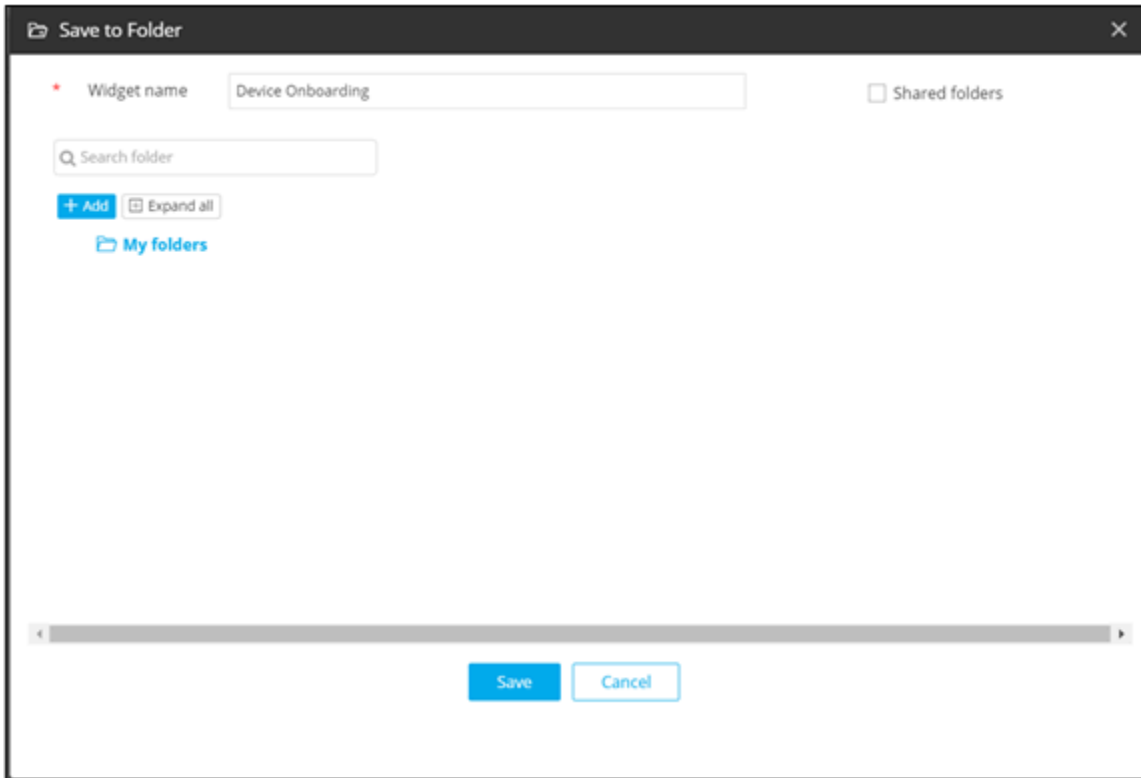
You can save one or more page/widget elements into a custom folder.

To save a widget to a folder:

1. From the top right corner of the widget to be saved, click .




2. In the **Save to Folder** window, enter or select the field information.



This table describes the fields in the **Save to Folder** window:

Field	Description
*Widget name	Enter a suitable widget name.
Search bar	Allows users to search for a particular folder.
Add	Allows users to add new folders and sub-folders.
Expand All	Allows users to expand and collapse folders.
My folders	Shows subfolders within My folders.
Shared folders	Allows users to save a widget in a shared folder.

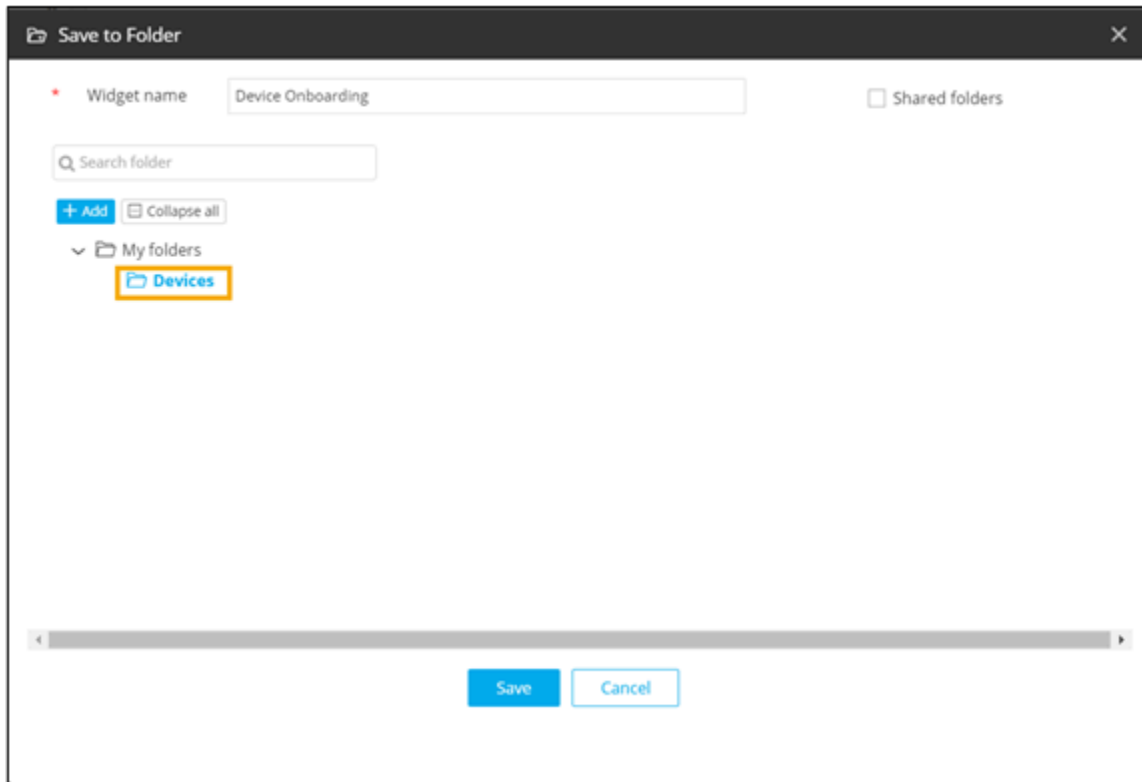
 **Note:** The asterisk (*) symbol indicates mandatory fields.

- [Saving a widget in My Folders](#)
- [Saving a widget in Shared Folders](#)

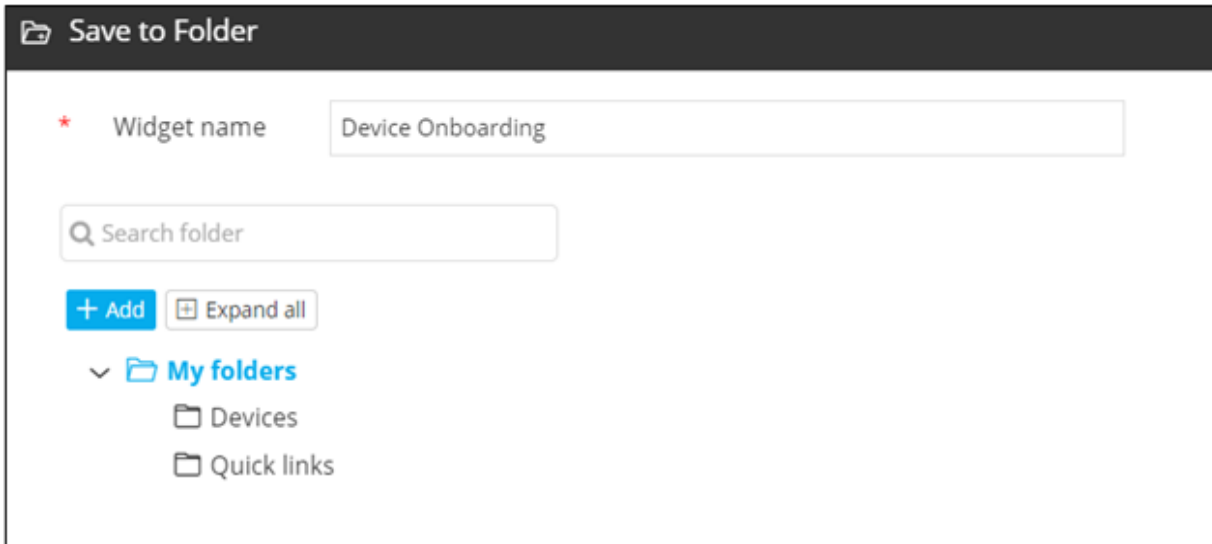
Saving a widget in My Folders

To save a widget to be reused only by the user who created the widget:

1. In the **Save to Folder** window, under **My folders**, click on the folder in which you want the widget to be saved.

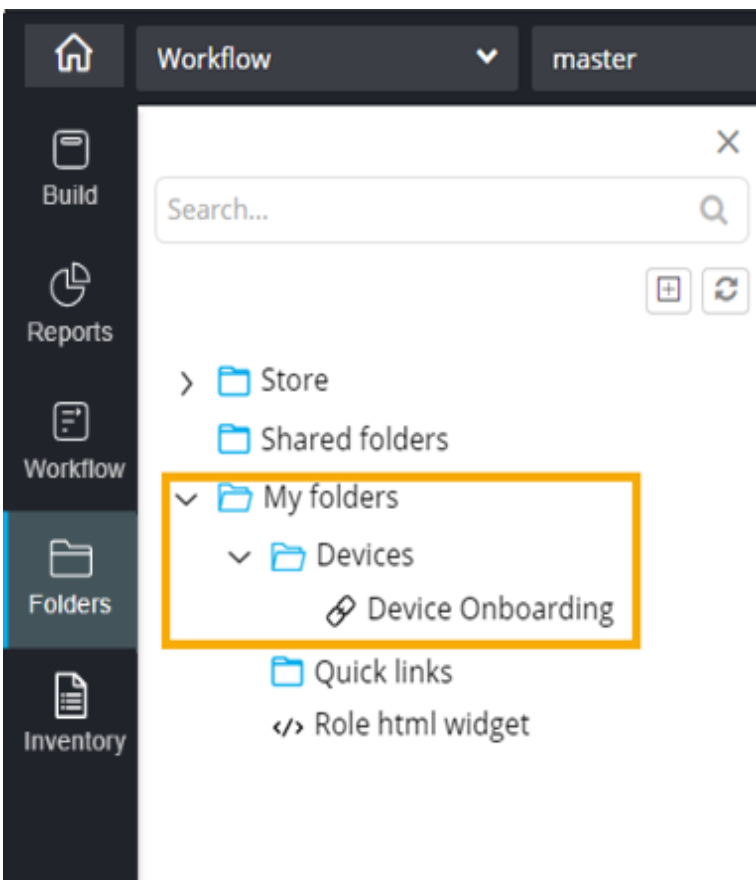


2. To create a new folder for saving the widget, click **Add**.
3. Enter the folder name.
A new folder is created.



4. Select the folder in which you want to save the widget.
5. Click **Save**.

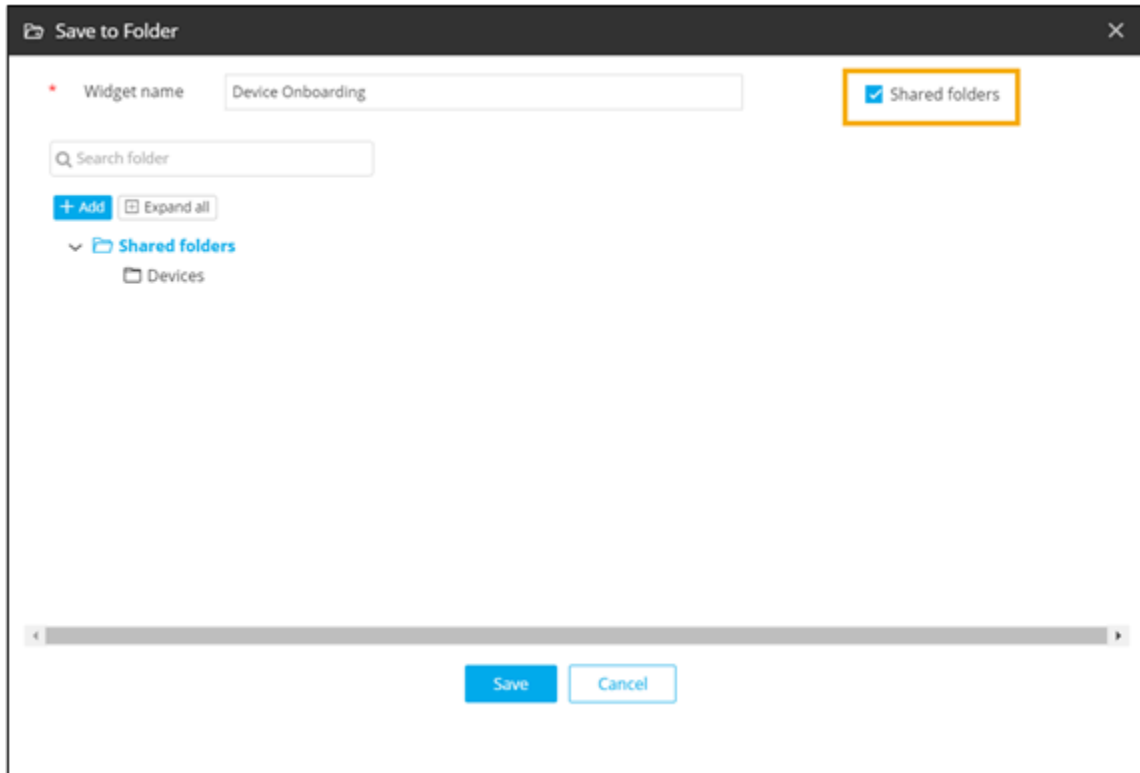
The widget is saved in the selected folder.



Saving a widget in Shared Folders

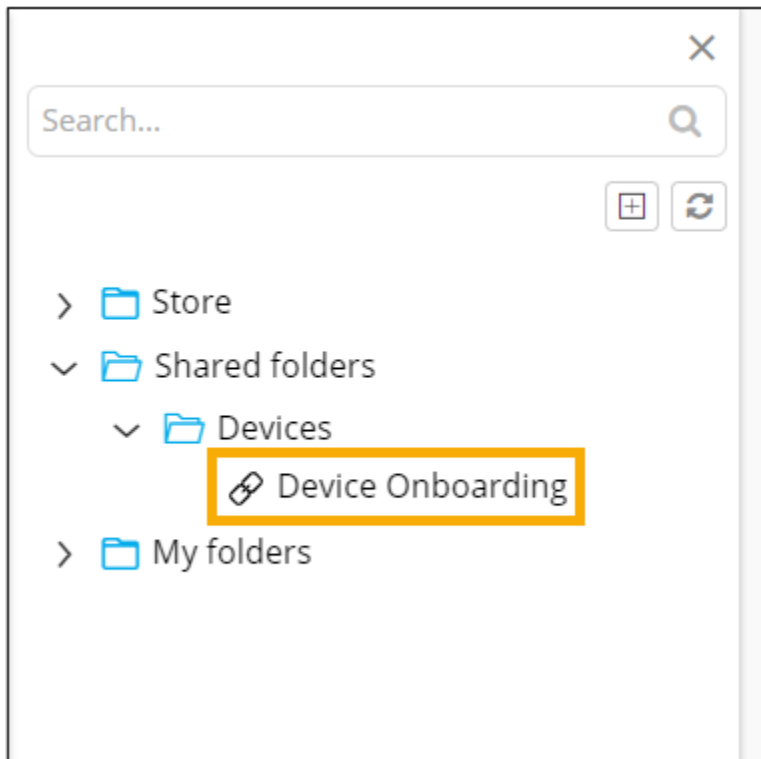
To save a widget that can be shared with other users:

1. In the **Save to Folder** window, select the **Shared Folders** checkbox.




2. Click on the shared folder where you want the widget to be saved. For example, Devices.
3. To create a new folder under the Shared folders, click **Add**.
4. Select the required folder and click **Save**.

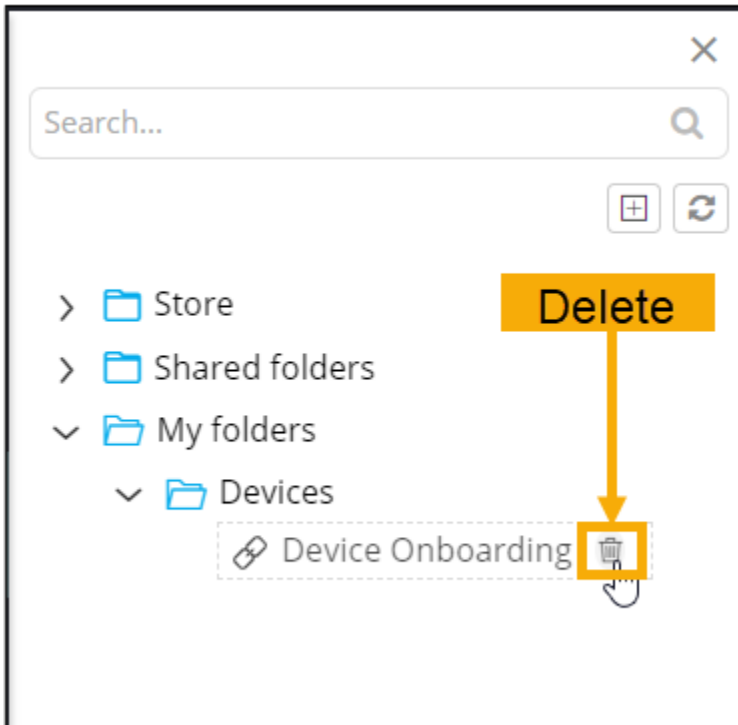
The widget is saved in the selected shared folder.



Deleting Folders

To delete a folder from My Folder or Shared Folders:

1. From the component panel on the left, click **Folders**.
2. Click  next to the folder name.

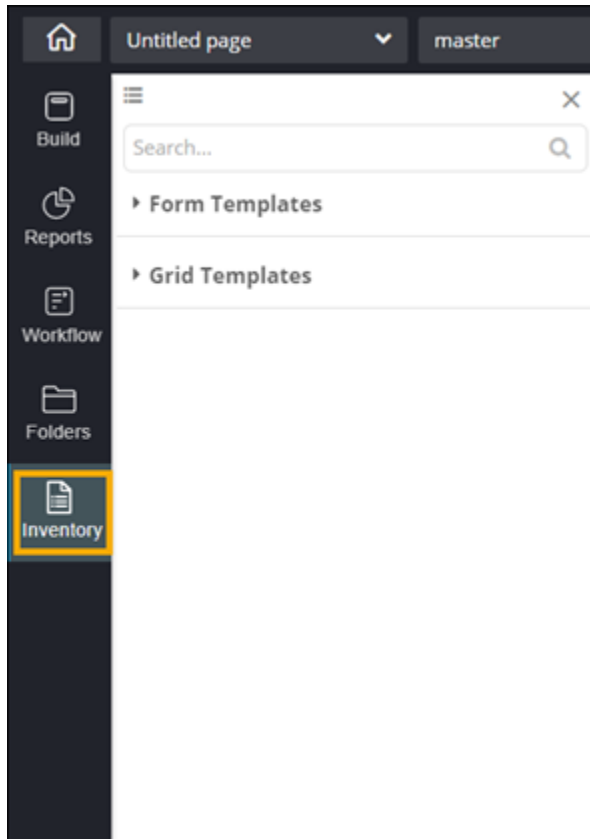


3. In the **Confirmation** window, click **Yes**.


Inventory

Self-service Pages has an inventory of pre-built form and grid templates which can be used out of the box for quick self-servicing or customized as per requirement. Forms enable easy self-servicing capabilities to the Line of Business (Application owners, NetOps and so on) via an intuitive GUI-based interface, thus abstracting the end user from underlying infrastructure configurations.

The **Inventory** can be accessed from the component panel on the left.



This table describes the options available in this section:


Option	Description
	Allows you to switch between a list view and grid view of the forms.
Search	Allows you to search for a specific OOB or custom form.
Form Templates	This folder contains a set of prebuilt out of the box (OOB) forms that you can add to your page for
Grid Templates	This folder contains a set of prebuilt out of the box (OOB) grid templates that you can add to your p servicing.

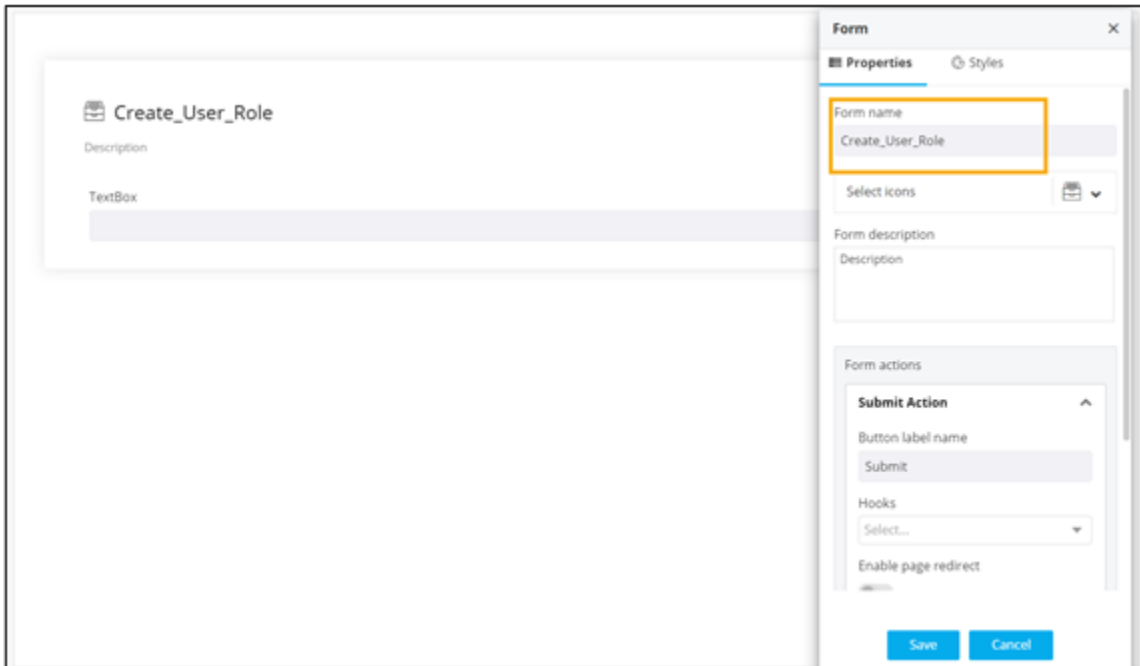
- [Getting started with designing a Custom Form](#)
- [Using Form Templates](#)
- [Designing a new Form](#)
- [Enabling Auto trigger](#)
- [Saving Forms to Custom Folder](#)
- [Form Field - Label](#)
- [Form Field - Text Box](#)

- [Form Field - Password](#)
- [Form Field - Date Time Picker](#)
- [Form Field - Text Area](#)
- [Form Field - Radio Button](#)
- [Form Field - Checkbox](#)
- [Form Field - Select Box](#)
- [Form Field - Multi-select Box](#)
- [Form Field - Form Button](#)
- [Form Field - Download](#)
- [Form Field - File Upload](#)
- [Form Field - Script Editor](#)
- [Form Field - Tabular](#)
- [Form Field - Rich Text Editor](#)

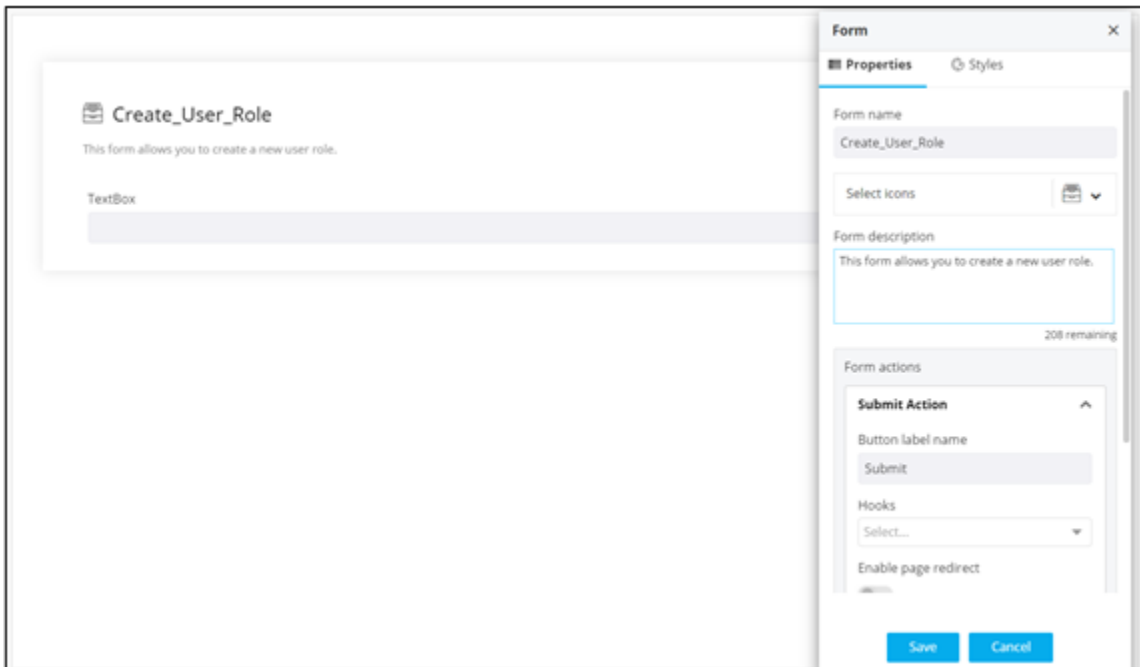
Getting started with designing a Custom Form

This example will help you understand how to design a basic form for creating a new role.


1. [Design](#) a new page.
2. Under **Build > Form**, drag and drop the **Text Box** form field to the design canvas.
3. To change the form name, hover your mouse over the form widget and from the top right corner, click .
4. In the **Form** pop-up window, under **Properties**, change the **Form name** to Create_User_Role.

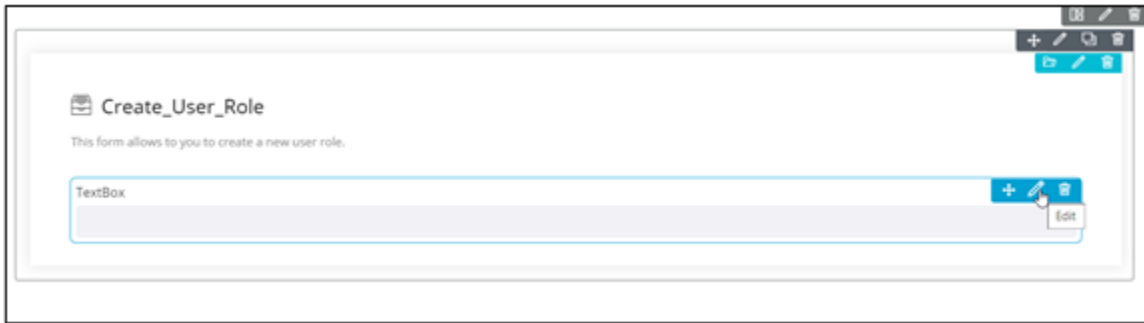


5. In the **Form** pop-up window, under **Properties**, add a suitable **Form description**.



6. Click **Save**.

7. To rename the **Text Box** field, hover your mouse over the Text Box field and click .




8. In the **Text Box** pop-up window, under **Properties**, enter or select the following field information:

Field	Description
*Label name	Enter a valid Label name for the form field. For example, Role name.
*Field ID	Enter a unique Field ID.
Mandatory	Turn on the toggle to make this field mandatory.
All asterisk (*) marked fields are mandatory.	

9. Click **Save**.

10. To add another Text Box field to the same form, drag and drop the **Text Box** widget within the existing form space.




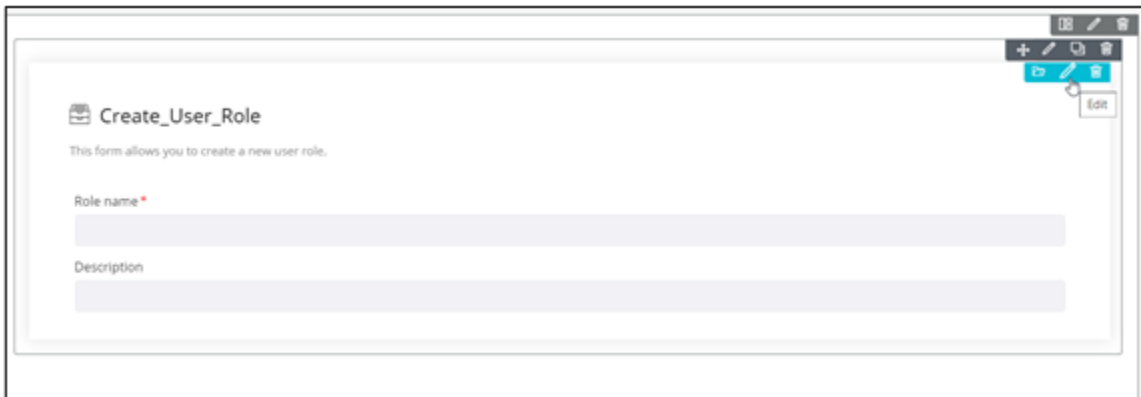
11. To configure this **Text Box** field, hover your mouse over the Text Box field and click .

12. In the **Text Box** pop-up window, under **Properties**, enter or select the following field information:

Field	Description
*Label name	Enter a valid label name for this field. For example, Role name.
*Field ID	Enter a unique Field ID.
All asterisk (*) marked fields are mandatory.	

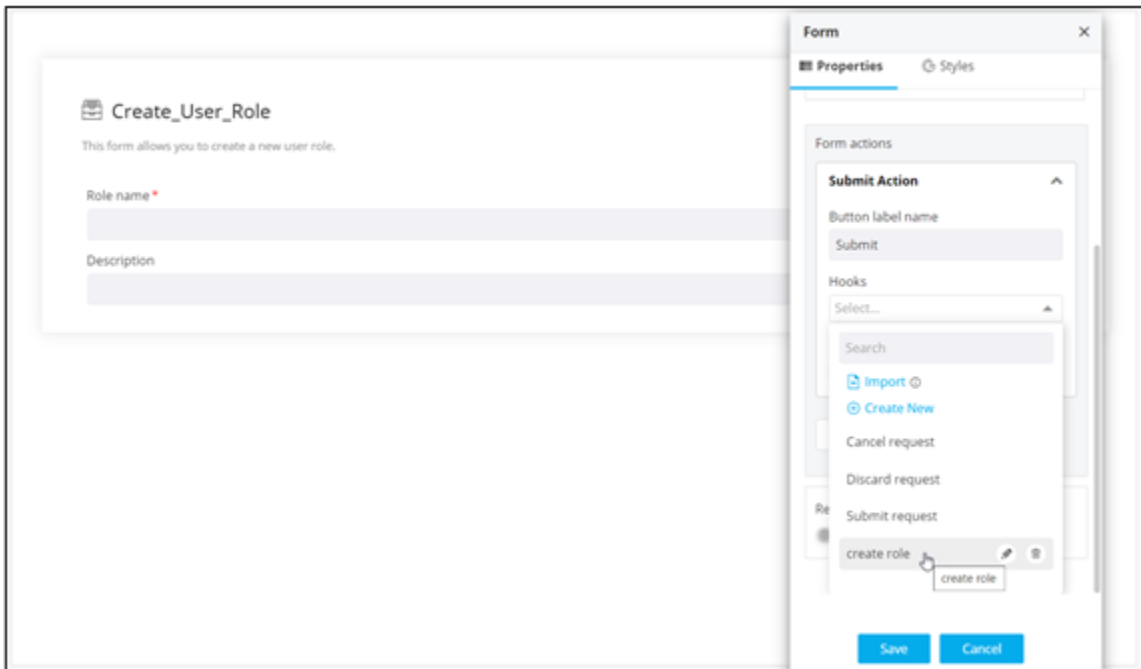
13. Click **Save**.

14. To add a Submit button to the form, hover your mouse over the form and from the top right corner of the form, click .



15. In the **Form** pop-up window, under **Properties**, scroll down to **Form actions**.

16. Under **Form actions**, select, import, or create a new hook for the Submit form action.



17. Click **Save**.
18. To use this form to create a new user role, click **Preview**.



The Preview page opens in a new tab.

19. Enter the **Role name** and **Description** for the new user.
20. Click **Submit**.

The new user role is created and can be seen under **Account > Role**.

Name	Description	Status
Dummy_1	test	Enabled
mint	Test mint role	Enabled
mint1	mint1 test	Enabled
mint2	2 test	Enabled
mint3	mint test 3	Enabled
mint_test_1	hello mint test 1	Enabled
mint_test_2	hello mint test 2	Enabled
test		Enabled
testrole		Enabled
test_123	testrole	Enabled
test_role	User role created for testing	Enabled
testing	testing	Enabled
testing123	hello	Enabled
testing121	fudgfulfuff	Enabled
testrole12		Enabled
testrole23	test	Enabled

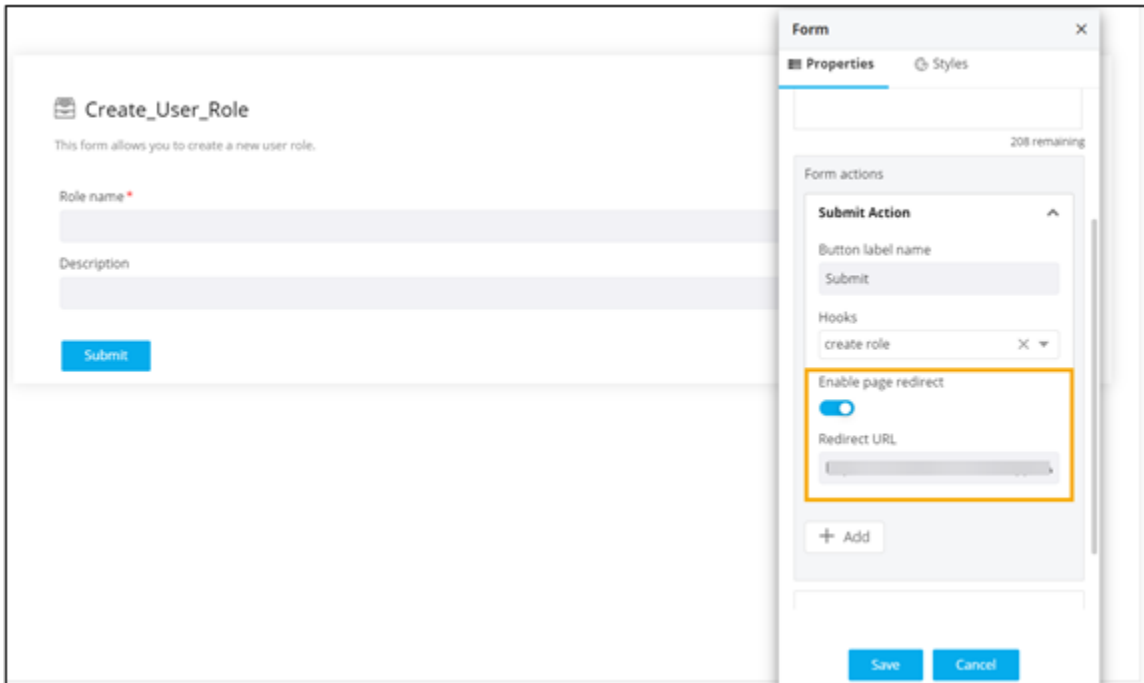
- [Redirecting to a Page after Submit](#)

Redirecting to a Page after Submit

When designing a form, there is a provision to define the form action to redirect to another page in a new tab.

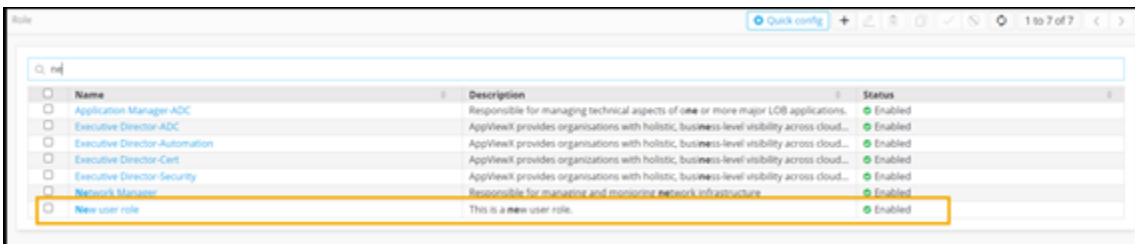
To add redirect action to the Submit form:

1. Hover over the form widget and click .
2. In the **Form** pop-up window, under **Properties**, scroll down to **Form actions**.
3. Under Form action, turn on the **Enable page redirect** toggle.
4. In the **Redirect URL** field, enter the URL of the page to be redirected to.



5. Click **Save**.
6. To create a new role and redirect to the required page, click **Preview**.
7. Enter the **Role name** and **Description**.
8. Click **Submit**.

You will be redirected to the **Account > Role** page in the same tab.

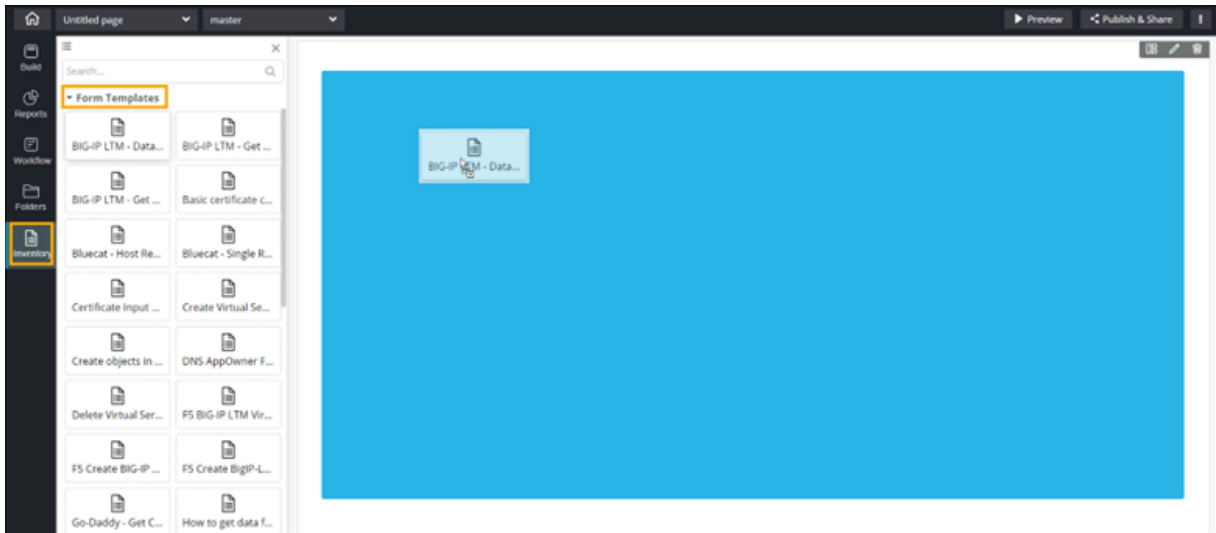


Using Form Templates

The **Inventory** section contains a set of prebuilt out of the box (OOB) Form Templates that you can add to your page for quick self-servicing.

To use a Form Template:

1. [Design](#) a page.
2. From the **Inventory** section, expand **Form Templates**.
3. Drag and drop the required form template to the canvas.



The selected form template is added to the canvas. It can be used as is or modified as per your requirement.



Designing a new Form

You can also design a form for your page using the different form field palettes available in the Design module under the **Build** section. Add individual form fields as required to the canvas and build your own form from scratch.

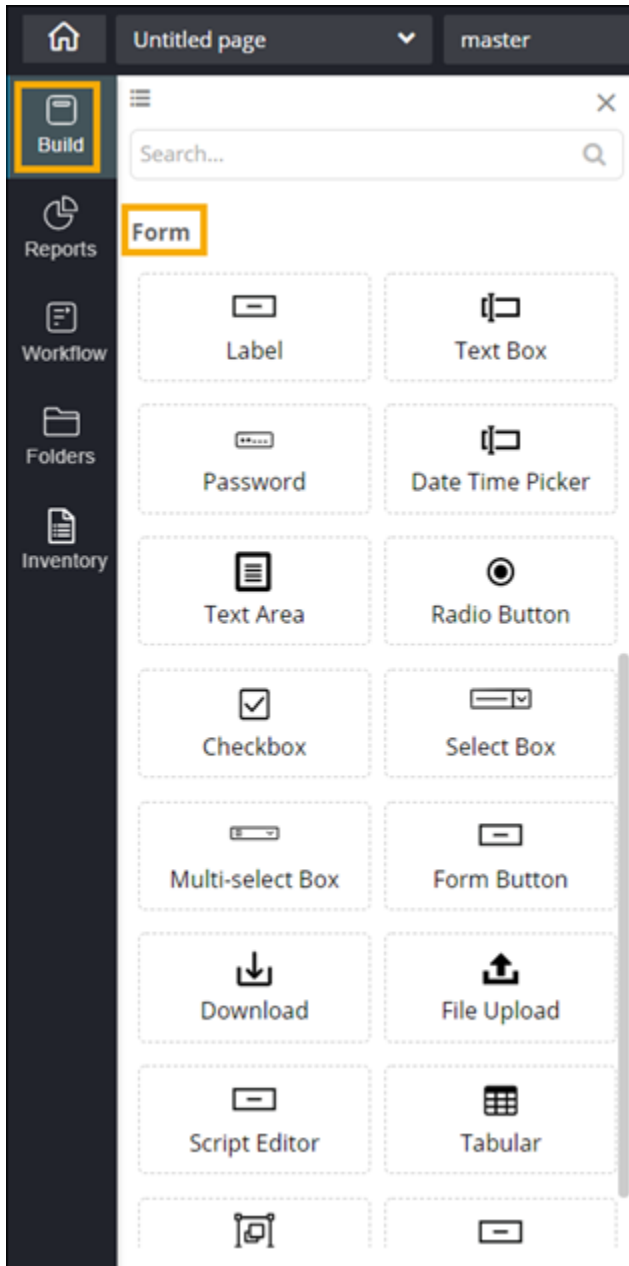
The following form fields are available:

- Date Time Picker
- Download
- File Upload
- Text Area

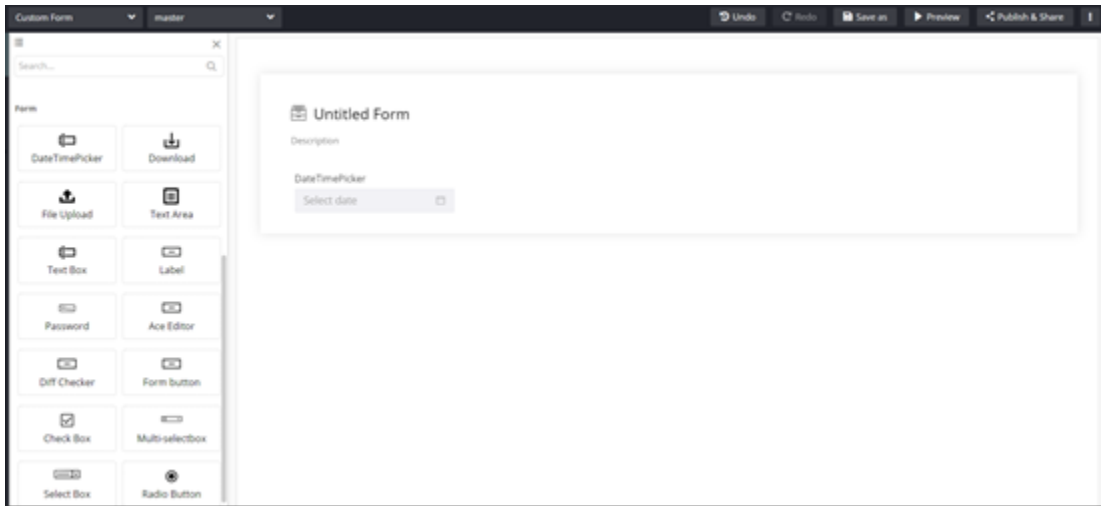
- Text Box
- Label
- Password
- Ace Editor
- Form Button
- Checkbox
- Multi-select Box
- Select Box
- Radio Button
- Form Group
- Tabular

To access these form fields:

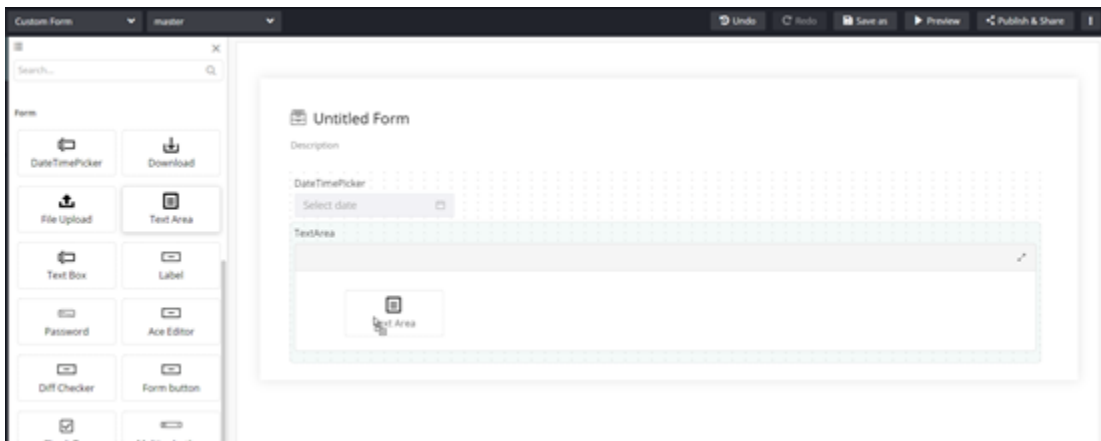
1. From the navigation menu on the left, click **Build**.
A list of form components are displayed under **Form**.



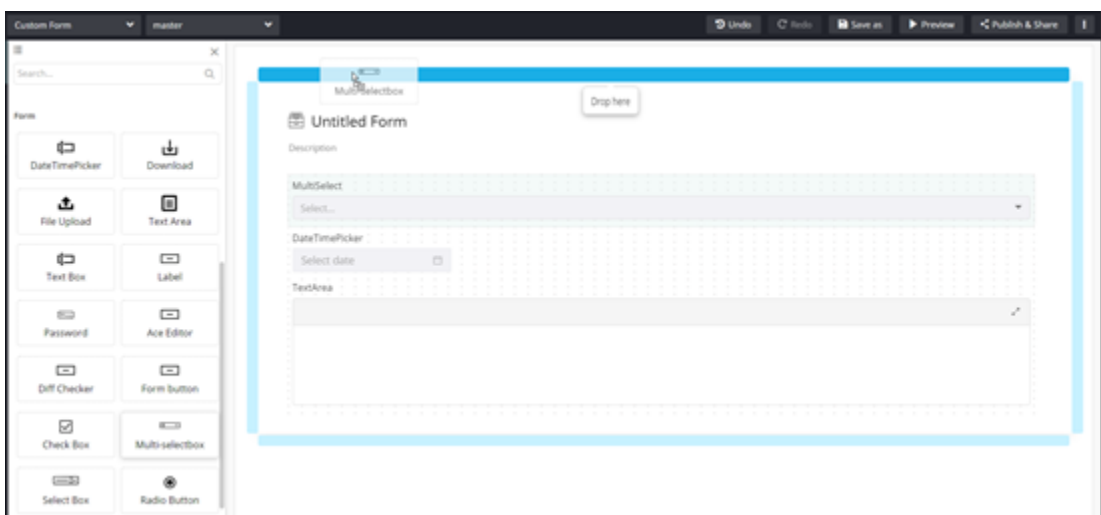
2. To add a form field to the form, drag and drop the form field to the canvas.
A form is created with the selected form field.



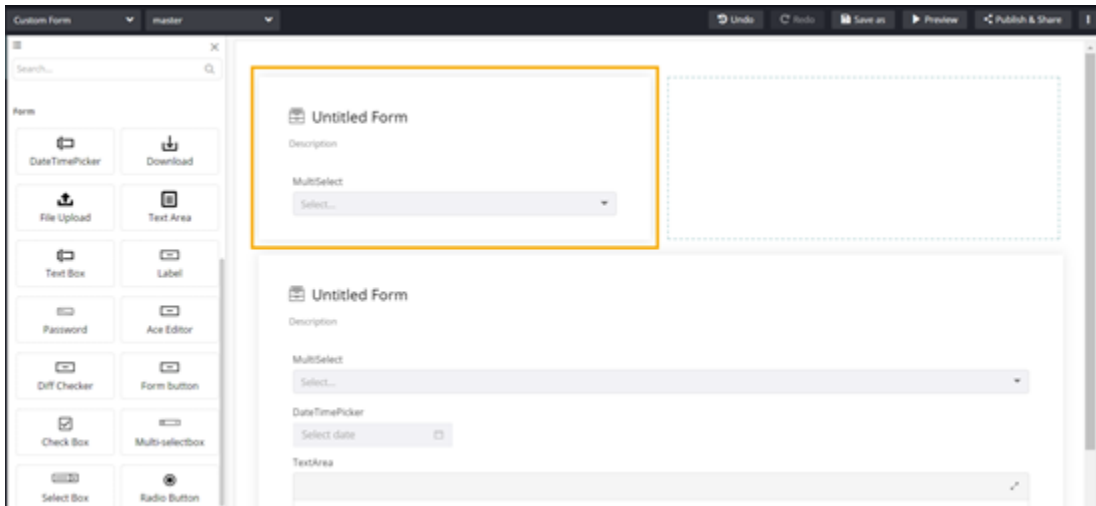
3. To add another form field to the same form, select the required form field and drop it in the form area.



4. To add a form field in a new form, drag and drop the required form field widget into any blue highlighted space in the canvas.



A new form with the selected form field is created.




Note: For more information on configuring the form properties such as Form name and description, adding hooks, click [here](#).



Note: For more information on customizing the form features such as border, size, background color and so on, click [here](#).


- [Configuring the Form - Properties](#)
- [Configuring Form Actions](#)
- [Assigning Hooks to Form Fields](#)
- [Configuring the Form - Styles](#)
- [Modifying Individual Form Fields](#)

Configuring the Form - Properties

To customize the form properties, hover your mouse to the top right corner of the form and click . The **Form** po-up window opens.



This table describes the options available under the **Properties** tab:

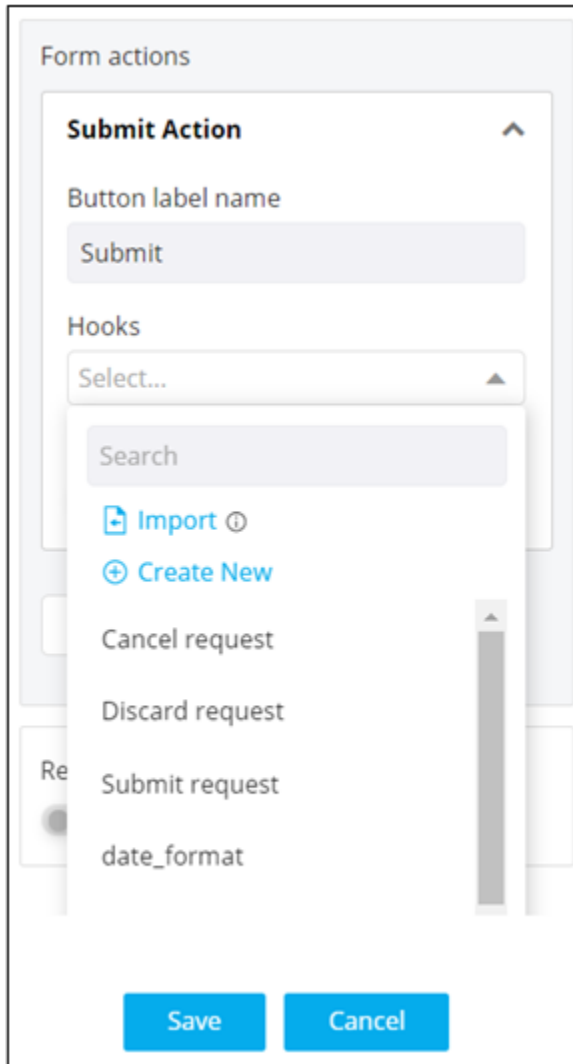
Field	Description
Form name	Allows you to provide a valid name for the form.
Select Icons	Allows you to select an icon for the form from the available options in the dropdown.
Form Description	Allows you to create a short description for the form.
Select script to run on form load	Allows you to select a script from the options available in the dropdown. This script automatically fetches the values for all the fields in the form when the form loads.
Form Actions	Allows you to add action buttons to the form such as Next, Save, Submit and assign hooks. <div style="border: 1px solid #007bff; border-radius: 10px; padding: 5px; background-color: #e6f2ff;">  Note: For more information on Form Actions, click here. </div>
Reset Action	Allows you to add a Reset button to the form. Enabling the toggle displays the Button label name field where you can provide the name for the button.

Configuring Form Actions

This feature allows you to add buttons to your form such as Next, Save, Submit, Reset, and assign hooks.

To add a Submit action to the form:

1. Under **Button label name**, enter a valid name for the button. For example, Submit.
2. Under **Hooks**, select the appropriate hook from the available options in the dropdown or import/create/modify a hook.



The screenshot shows a 'Form actions' configuration window. The title is 'Form actions'. Below it is a section titled 'Submit Action' with an upward arrow. Under 'Submit Action', there is a 'Button label name' field containing the text 'Submit'. Below that is a 'Hooks' dropdown menu currently showing 'Select...'. A search bar is visible above the dropdown. Below the search bar are three options: 'Import' with a document icon and a question mark, 'Create New' with a plus icon, and a list of hooks: 'Cancel request', 'Discard request', 'Submit request', and 'date_format'. At the bottom of the window are two buttons: 'Save' and 'Cancel'.



Note: For more information on assigning hooks to form fields, click [here](#).

3. To redirect to a page after clicking the Submit button, turn on the **Enable page redirect** toggle. For example, if you want to create a new user or role and after submitting the form you want to be redirected to the Role page, you can enable this option.
4. Once the page redirect is enabled, the **Redirect URL** field is displayed.

Submit Action ^

Button label name

Hooks

Enable page redirect

Redirect URL

+ Add

5. Add the Redirect URL and click **Add** to add the Submit action to the form.
Submit button is added to the form.

Device ⊕

Description *

Priority *

Impact *

Create Change ticket

Change ID *

Get Ticket Status

Ticket Status *

Submit

Form x

Properties Styles

Form actions

Submit Action ^

Button label name

Hooks

Enable page redirect


+ Add

Reset action

Save Cancel

Assigning Hooks to Form Fields

You can assign hooks to the form fields or to the form action buttons (eg. Submit) to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface.

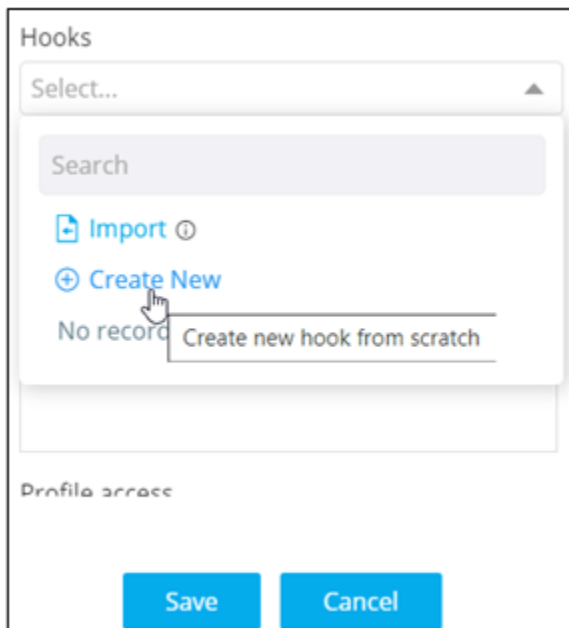
1. To assign a hook to a form field, hover over the form field and click .
2. In the field's pop-up window, under **Properties**, scroll down to **Hooks**.

The following options are available under Hooks:

- **Select an existing hook:** You can select an existing hook from the available options and assign it to the form field and fetch data.
 - **Import:** You can import a hook from the Hooks Inventory and assign it to the form field.
 - **Create New:** You can create a new hook and assign it to the form field.
 - **Modify:** You can modify an existing hook from the options available in the dropdown and assign it to the form field.
- [Creating a New Hook](#)
 - [Importing Hooks from Inventory](#)
 - [Modifying a Hook](#)

Creating a New Hook

1. Under the **Hooks** section, click **Create New**.



The **Hooks Inventory :: Add** window opens.

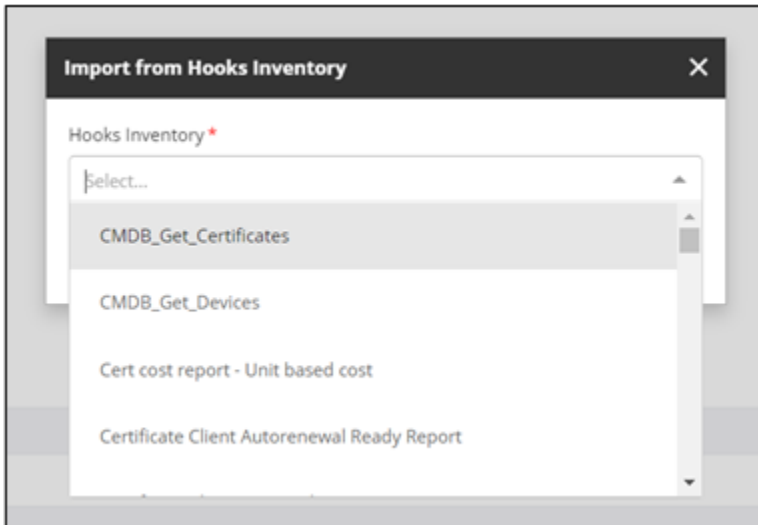
2. Create a new hook as per your requirement and click **Save**.

Importing Hooks from Inventory


1. Under the **Hooks** section, click **Import**.

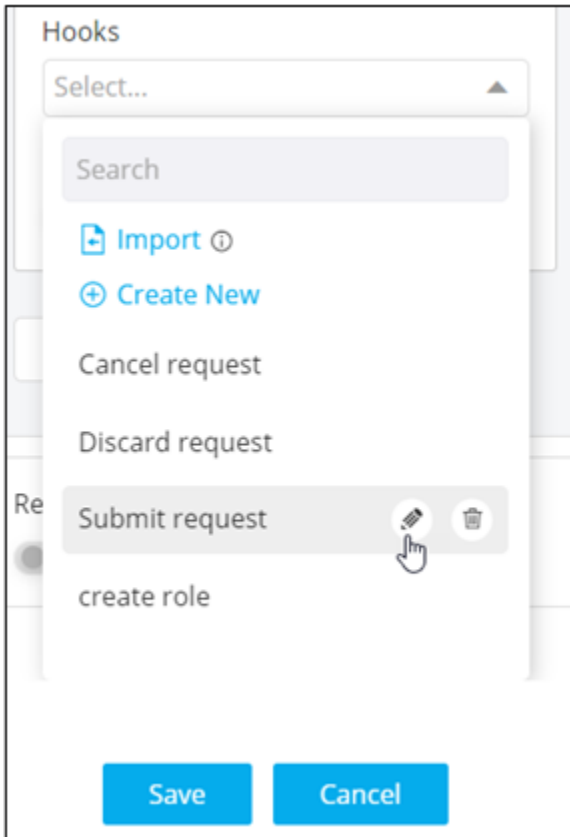
The **Import from Hooks Inventory** window opens with the list of hooks available in the inventory displayed in the dropdown.

2. Select the required hook from the list and click **Import**.

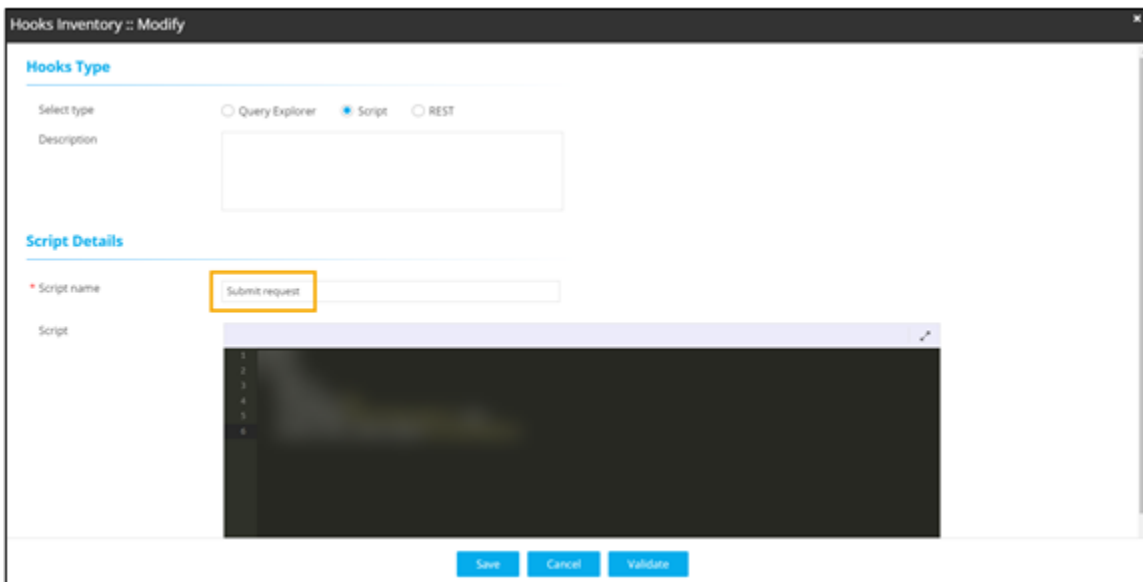


Modifying a Hook

1. Under the **Hooks** section, hover your mouse over the hook that is to be modified.
2. Click .



The **Hooks Inventory :: Modify** window opens. You can modify the hook and assign it to the form field.



Configuring the Form - Styles

For more options to customize the Form, click **Styles**.




The following table describes the options available under the **Styles** tab:

Field	Description
Weight	Allows you to define the weight of the Form name.
Size	Allows you to define the size of the Form name.
Line Height	Allows you to adjust the space between the Form name, description and the form border.
Color	Allows you to define the color for the Form name.
Align	Allows you to align the Form name to the left, center or right side of the form.
Background	Allows you to define the background color for the form.
Border	Allows you to define the border color, border style, and border width.

Modifying Individual Form Fields

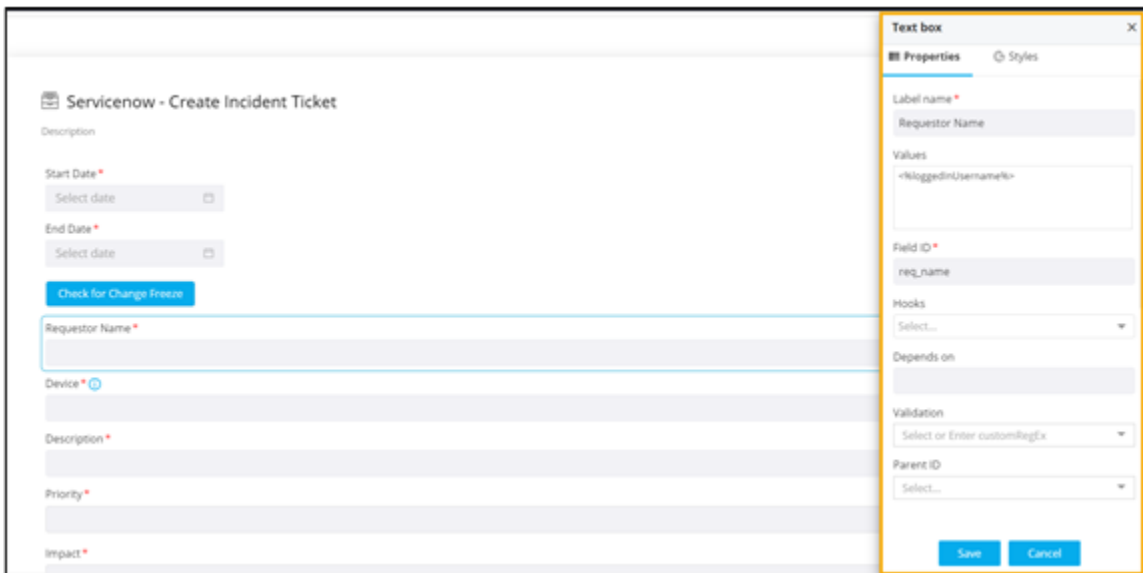
You can also modify, add, or delete individual form fields in an OOB form.

To edit a form field within an OOB form:

1. Hover your mouse over the form field you wish to modify and click .




A pop-up window for the form field is displayed with the **Properties** tab open by default.




2. Modify the form **Properties** and **Style** elements and click **Save**.

Enabling Auto trigger

This feature allows you to define an auto trigger for a form field. Enabling auto trigger fetches data automatically to populate the form field(s). In case Auto trigger is disabled, a  icon is displayed next to the form field. Clicking the icon will fetch the data from the database and populate the form field.

To enable auto trigger for a form field:

1. **Design** a form.
2. To edit a form field, hover your mouse over the field and click .
3. In the form field window, under the **Properties** tab, define an appropriate hook for this field.

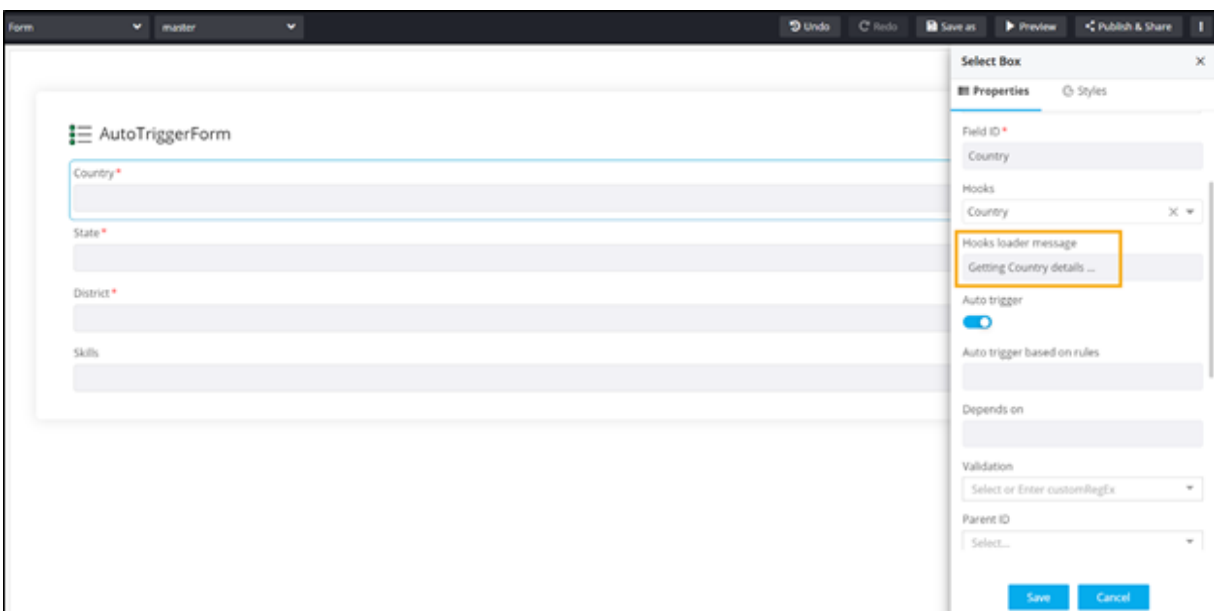


Once the hook is defined, the **Hooks loader message** field is displayed.

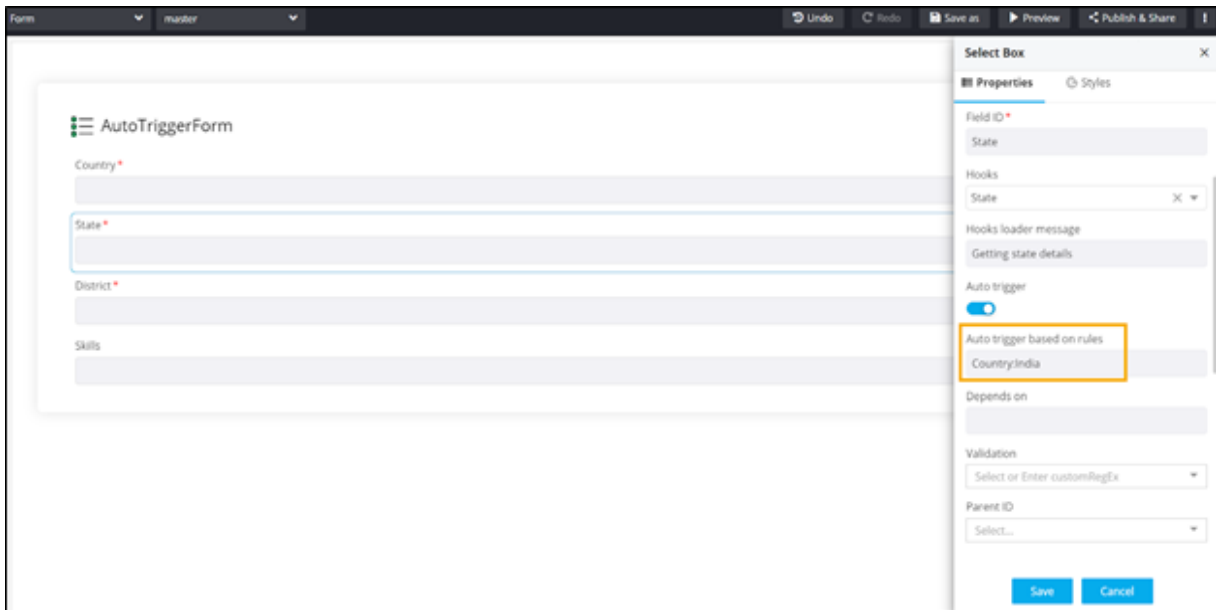


Note: For information on assigning hooks, click [here](#).

4. Enter a message in the **Hooks loader message** field. This message is displayed while the form field is loading the field values.



5. To enable **Auto trigger**, turn on the toggle.
6. In the **Auto trigger based on rules** field, define a rule for populating the next field in the form.



Note: This field is displayed only after a hook is assigned to the form field. Rules cannot be defined for the first field in the form.

7. Define hooks for the other fields and enable **Auto trigger** for form fields, where required.
8. Add a Hooks loader message and define rules for required fields.
9. Click **Preview**.
 - A preview of the form opens in a new tab and the data for the first field is fetched automatically. The Hook loader message is displayed while the values are being fetched.



- The values in the next form field are fetched automatically once a selection is made in the previous form field based on the rules defined.

The screenshot shows a form titled "AutoTrigger Form". It has two dropdown menus. The first is labeled "Country" and has "India" selected. The second is labeled "State" and has "Tamilnadu" selected. Below "Tamilnadu", other options like "Kerala", "Karnataka", and "West Bengal" are visible in a scrollable list.

- Values in the next form field are not fetched/displayed if a selection other than the defined rule is made. For example, the rule “State:TamilNadu” has been defined for the District field. So, if any value other than TamilNadu is selected in the State field, then no results will be displayed in the District field.

The screenshot shows the "AutoTriggerForm" with "Country" set to "Canada" and "State" set to "Kerala". The "District" dropdown menu is highlighted with an orange box and shows "No results found".


- Once the value TamilNadu is selected in the State field, the values for the District field will be fetched automatically.

The screenshot shows the "AutoTriggerForm" with "Country" set to "India" and "State" set to "TamilNadu". The "District" dropdown menu is highlighted with an orange box and shows "Coimbatore".

Saving Forms to Custom Folder

Any form created from scratch or a customized form template can be saved to the Custom folder to be reused later.

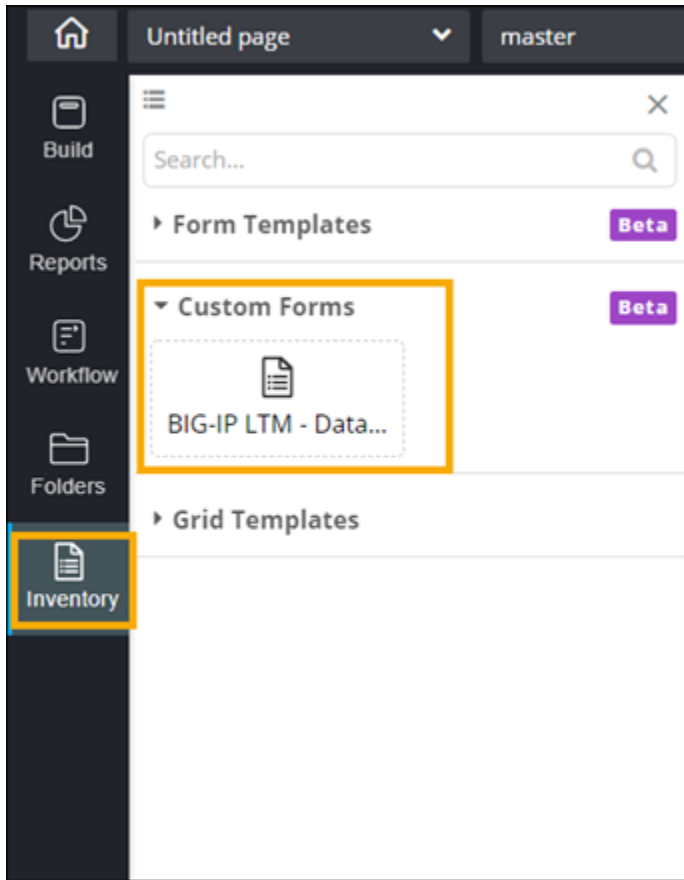
To save a form in the custom folder:

1. Hover your mouse over the form and click .



2. In the **Confirmation** pop-up window, click **Yes**.

The form is added to the **Custom** folder in the **Inventory** section.

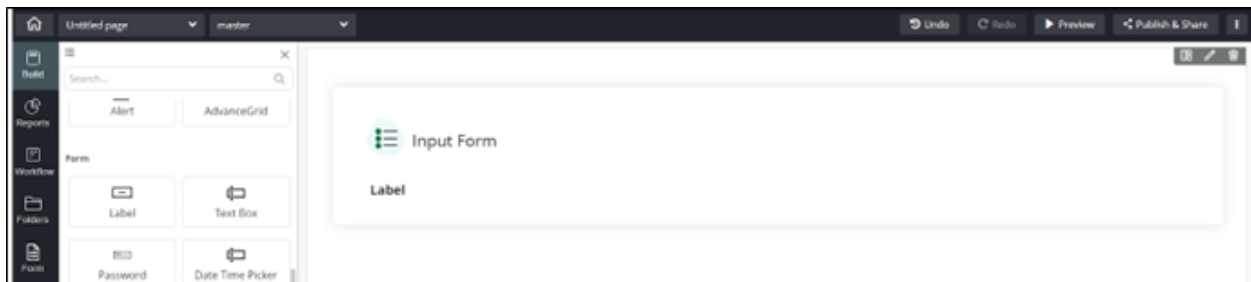


3. To reuse a custom form, simply drag and drop the required form from the **Custom** folder into the canvas.

Form Field - Label


You can add a Label field to the form on your page. This form field allows you to add a simple text or description to the form.

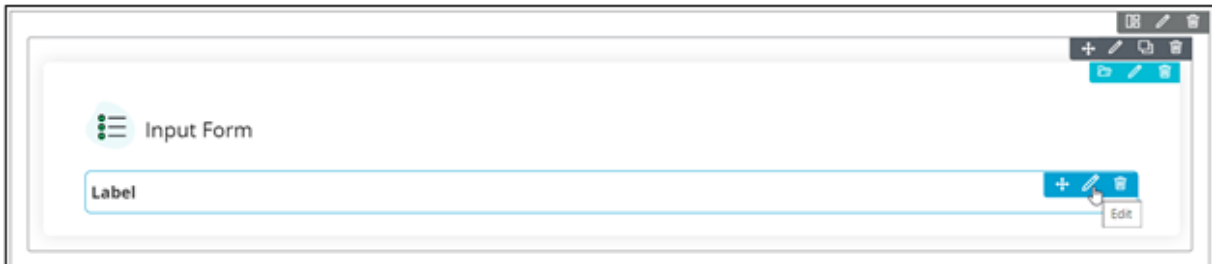
To add the Label field to your form, drag and drop the **Label** component to the build area.



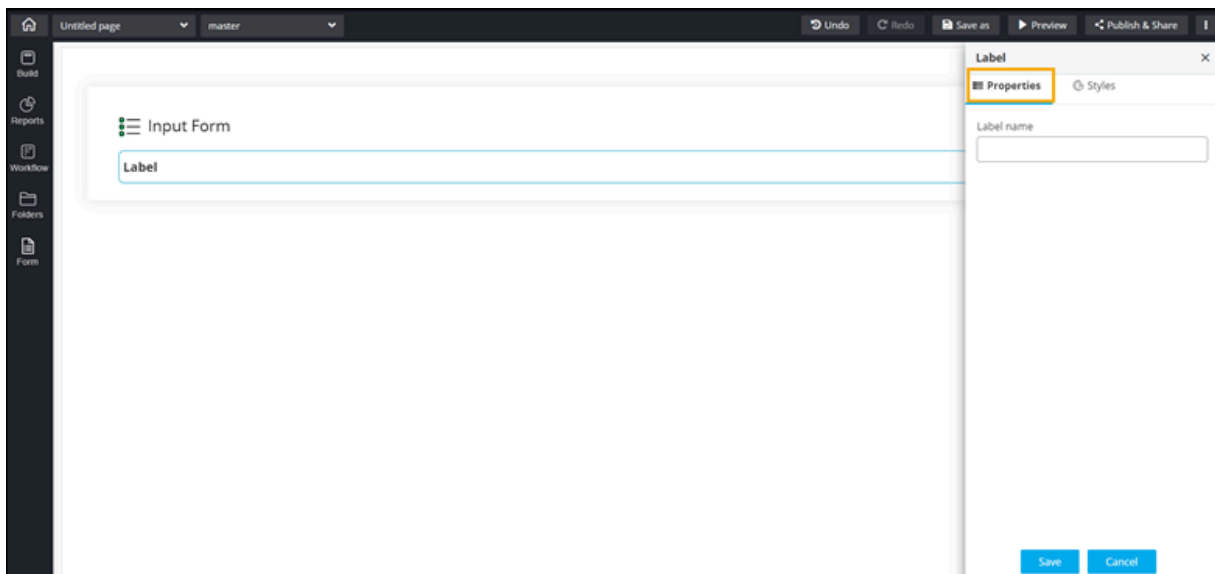
- Configuring the Label field - Properties
- Configuring the Label field - Styles

Configuring the Label field - Properties

1. To configure the Label widget, hover your mouse over the widget and click .



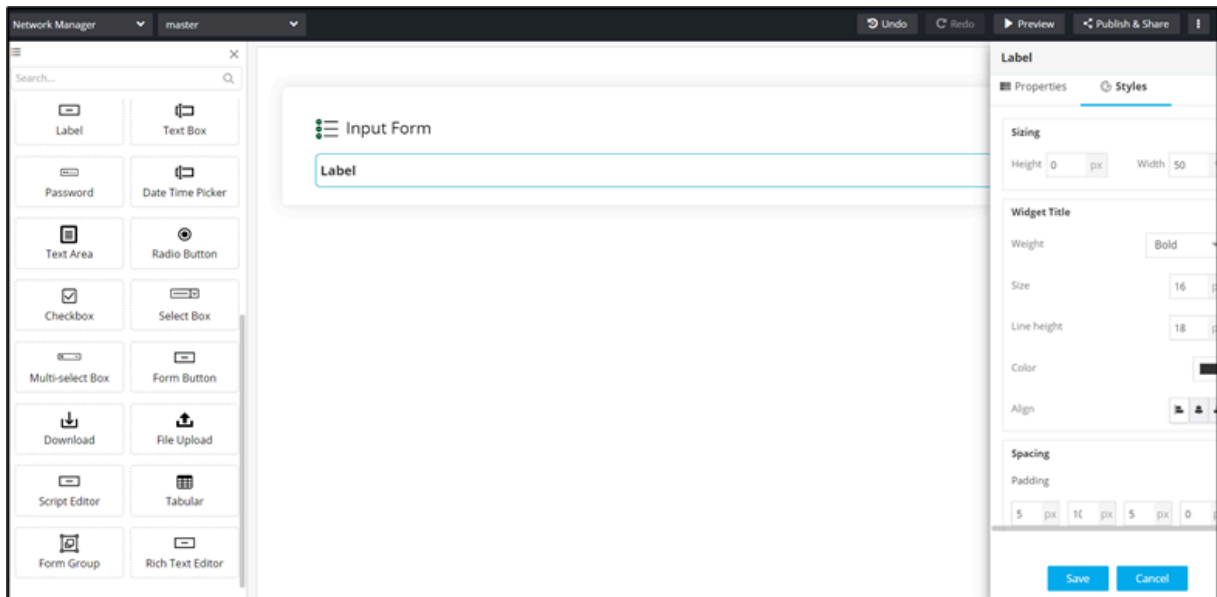
The **Label** pop-up window opens.



2. In the **Label** window, under **Properties**, enter a valid **Label name**.
3. To save your configurations, click **Save**.

Configuring the Label field - Styles


1. For more options to customize the Label, in the **Label** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

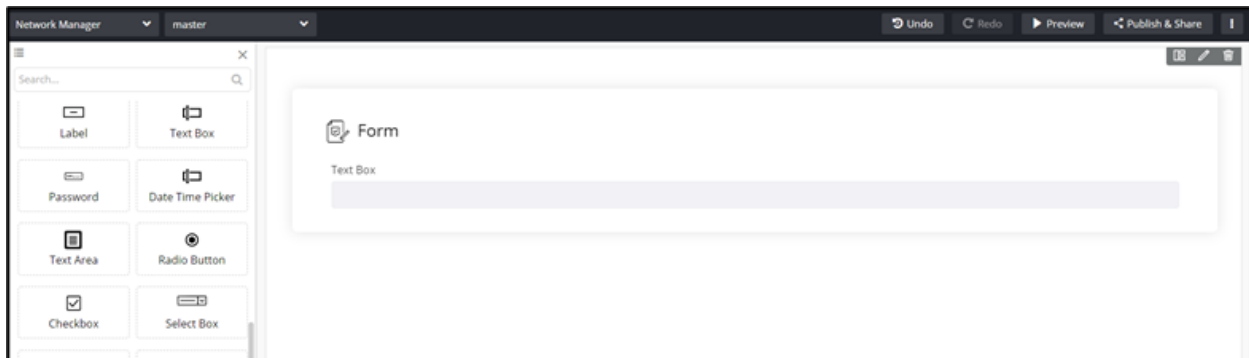
Field	Description
Sizing	Allows you to increase/decrease font Size of the field name.
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as

Field	Description
	<ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Text Box


You can add a Text Box field to the form on your page. This form field allows you to add a text box to your form where the user can enter text information.

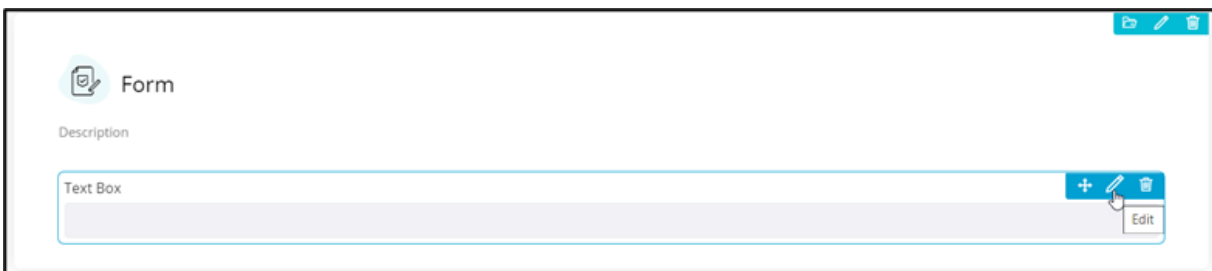


1. To add the Text Box field to your form, drag and drop the **Text Box** component to the design canvas.
2. To start typing, click inside the text box.

- [Configuring the Text Box field - Properties](#)
- [Configuring the Text Box field - Styles](#)

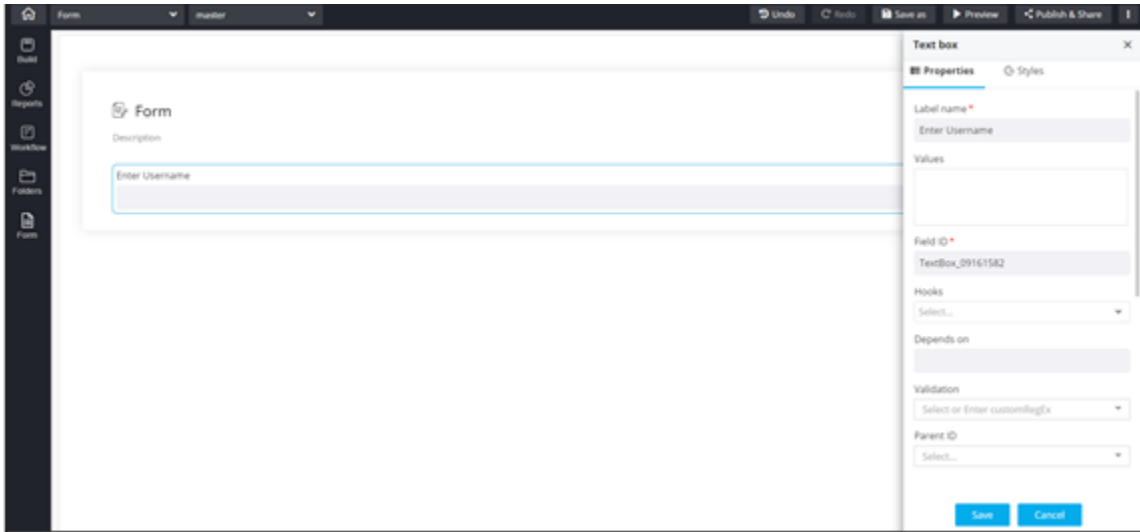
Configuring the Text Box field - Properties

1. To configure the **Text Box** form field, hover your mouse over the field and click .





The **Text Box** pop-up window opens.

2. In the **Text Box** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

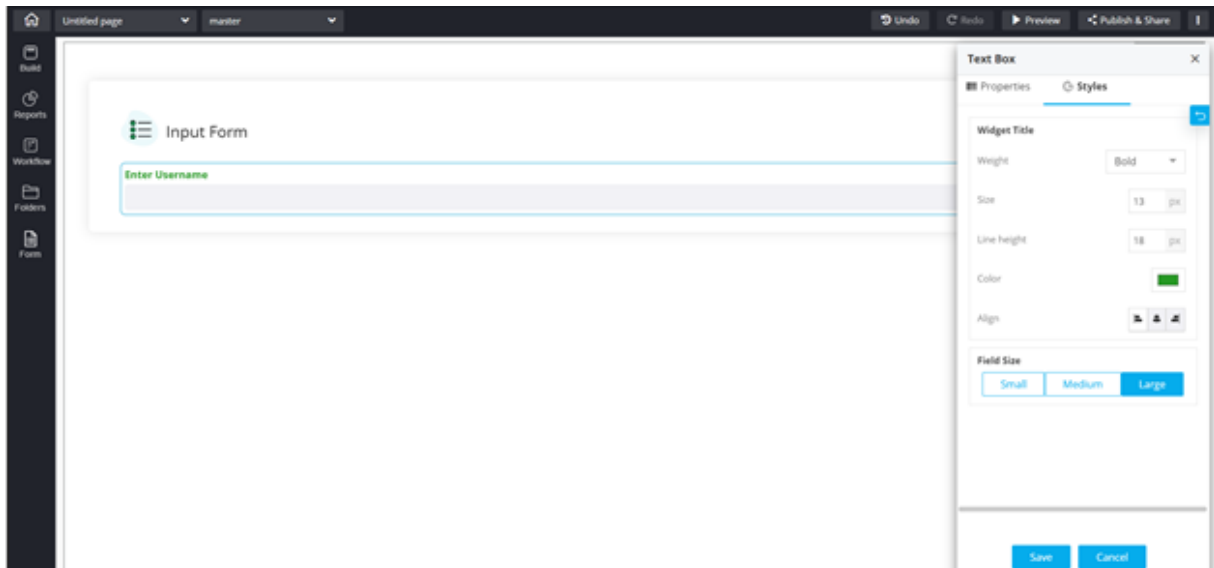
Field	Description
Label name	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #007bff; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>

Field	Description
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div style="border: 1px solid #0070C0; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	Allows you to add Help text/tooltip for the field.
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .

3. Click **Save**.

Configuring the Text Box field - Styles


1. For more options to customize the **Text Box**, in the **Date Time Picker** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

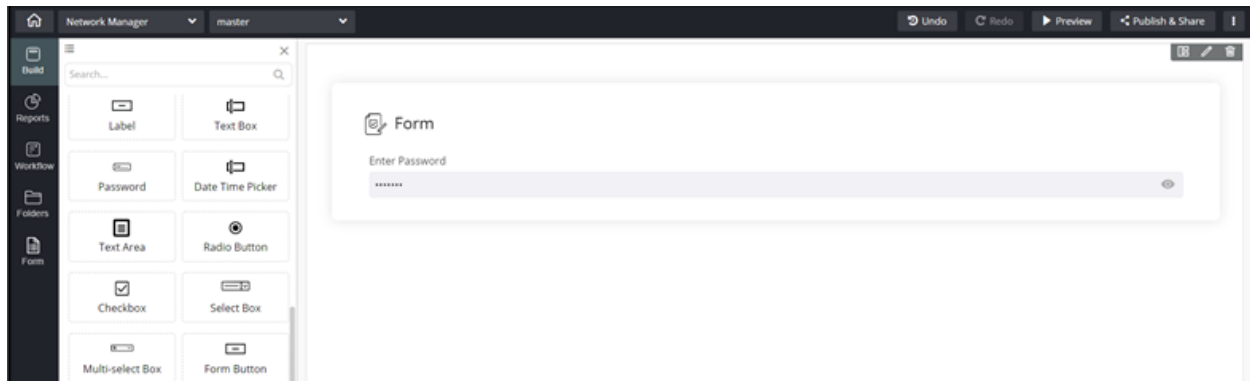
Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as


Field	Description
	<ul style="list-style-type: none"> • Small • Medium • Large

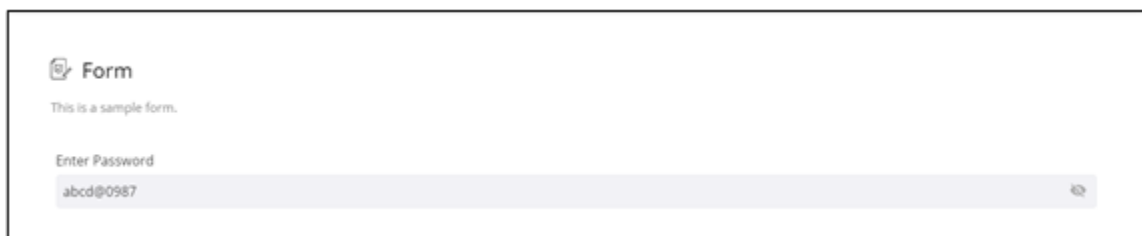
- To save your settings, click **Save**.
- To restore the settings under **Styles** to default, click .

Form Field - Password

You can add a Password field to the form on your page. This form field allows you to add a special text field that does not display text when the user types in it. Instead, the text typed by the user is represented as an asterisk or a bullet to maintain confidentiality of sensitive information.




- To add the Password field to your form, drag and drop the **Password** component to the design canvas.
- To make the password visible, click . The password is visible.

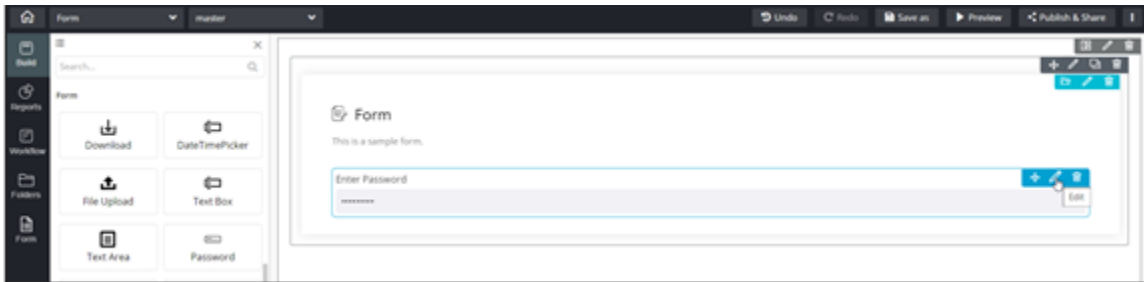


- To hide it again, click .

- [Configuring the Password field - Properties](#)
- [Configuring the Password field - Styles](#)

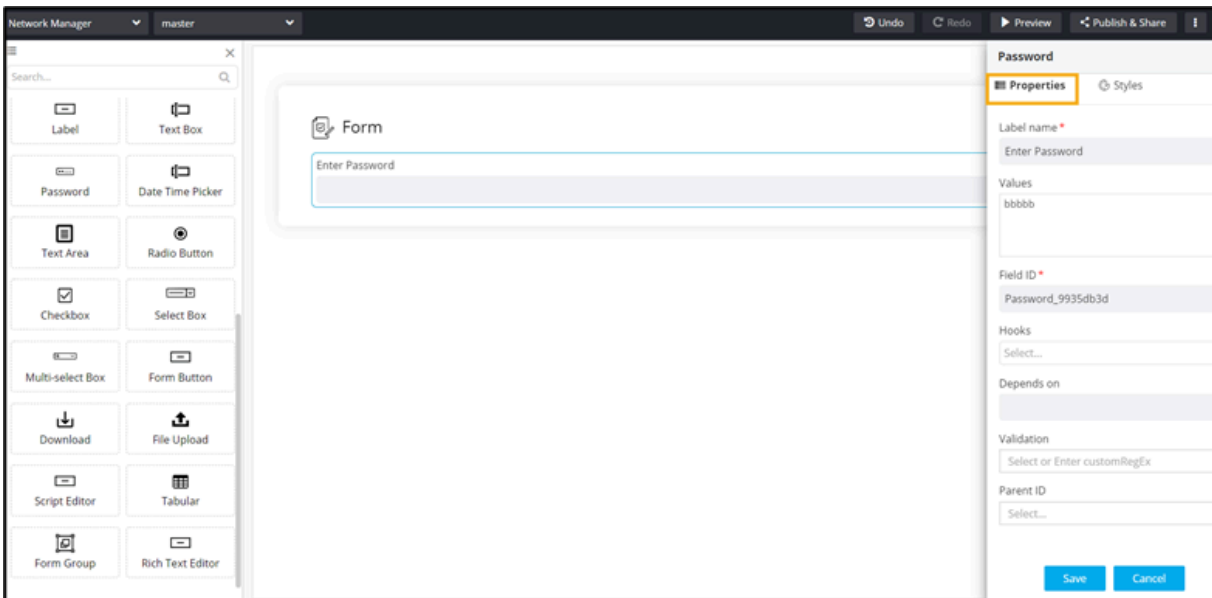
Configuring the Password field - Properties

1. To configure the Password field, hover your mouse over the field and click .





The **Password** pop-up window opens.

2. In the **Password** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field.

Field	Description
	<ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID*	<p>Allows you to assign a unique Field ID to refer to the field name.</p> <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	<p>Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date.</p> <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div data-bbox="391 821 1419 909" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div data-bbox="391 1514 1419 1602" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	<p>Allows you to add Help text/tooltip for the field.</p>
Profile Access	<p>Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.</p>

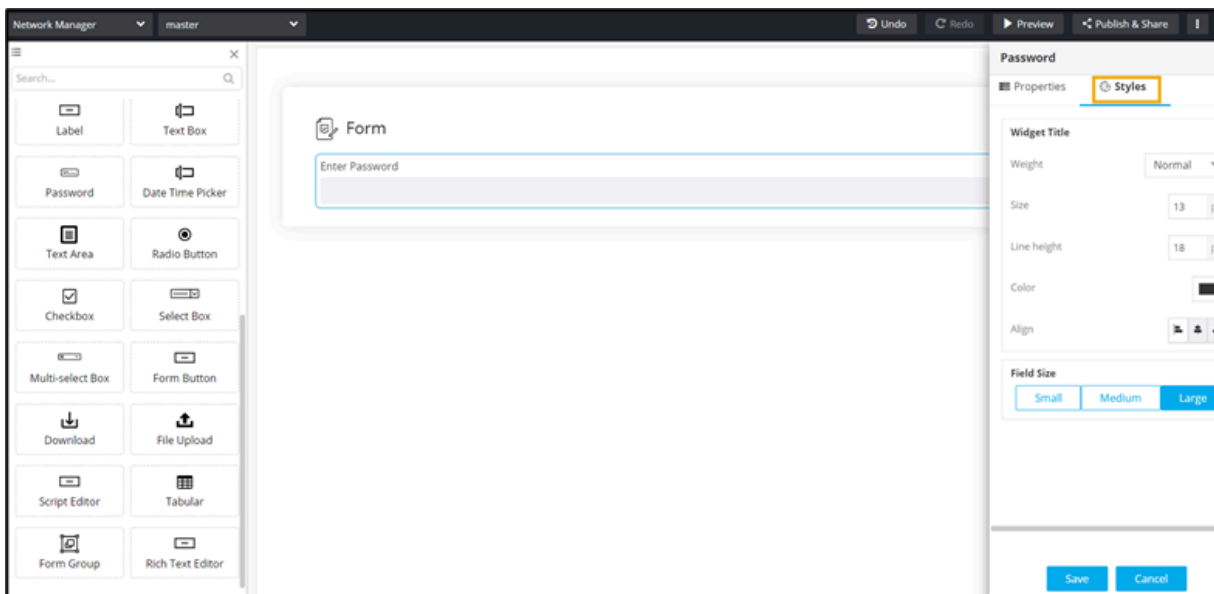
Field	Description
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .

All Asterisk (*) marked fields are mandatory.

3. Click **Save**.

Configuring the Password field - Styles


1. For more options to customize the Password, in the **Password** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

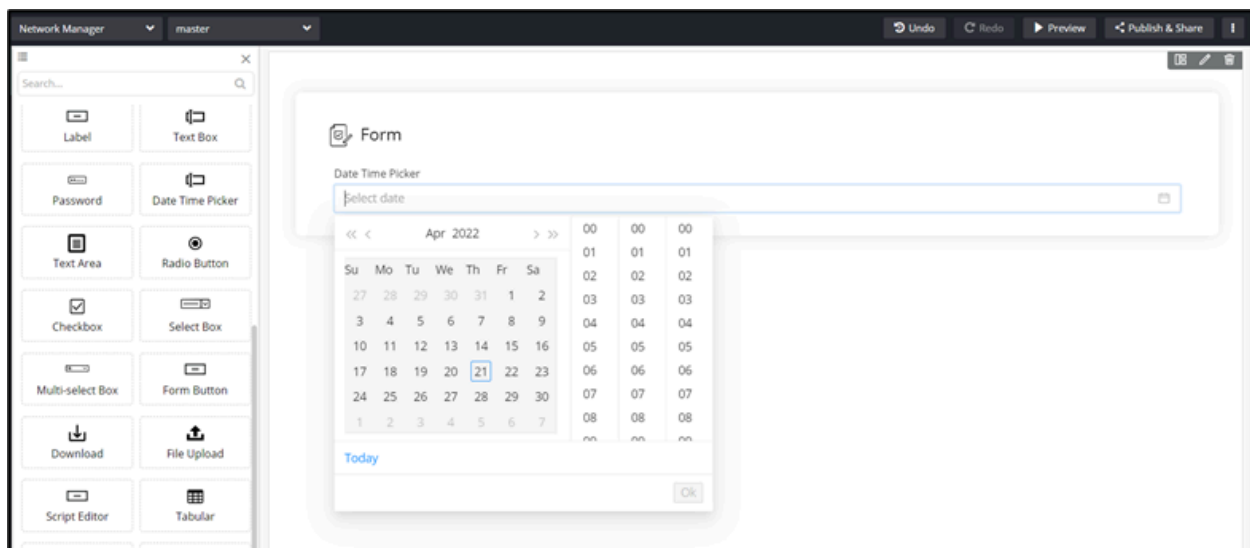
Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values:

Field	Description
	<ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as <ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .


Form Field - Date Time Picker

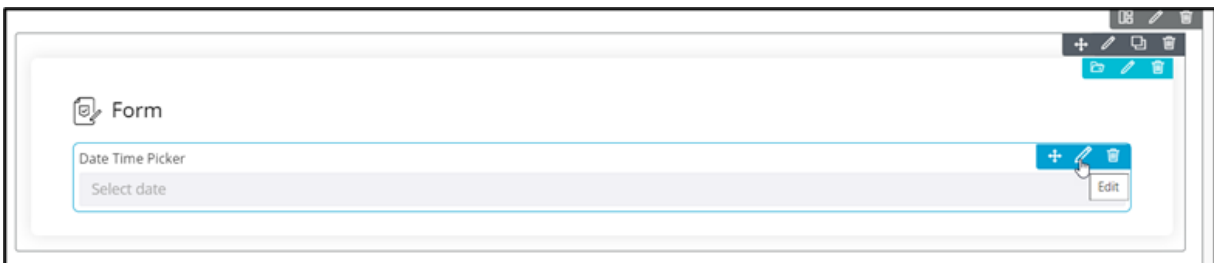
You can add a Date and Time picker field to the form on your page. This field enables you to enter date and time information and retrieve information based on the inputs provided.



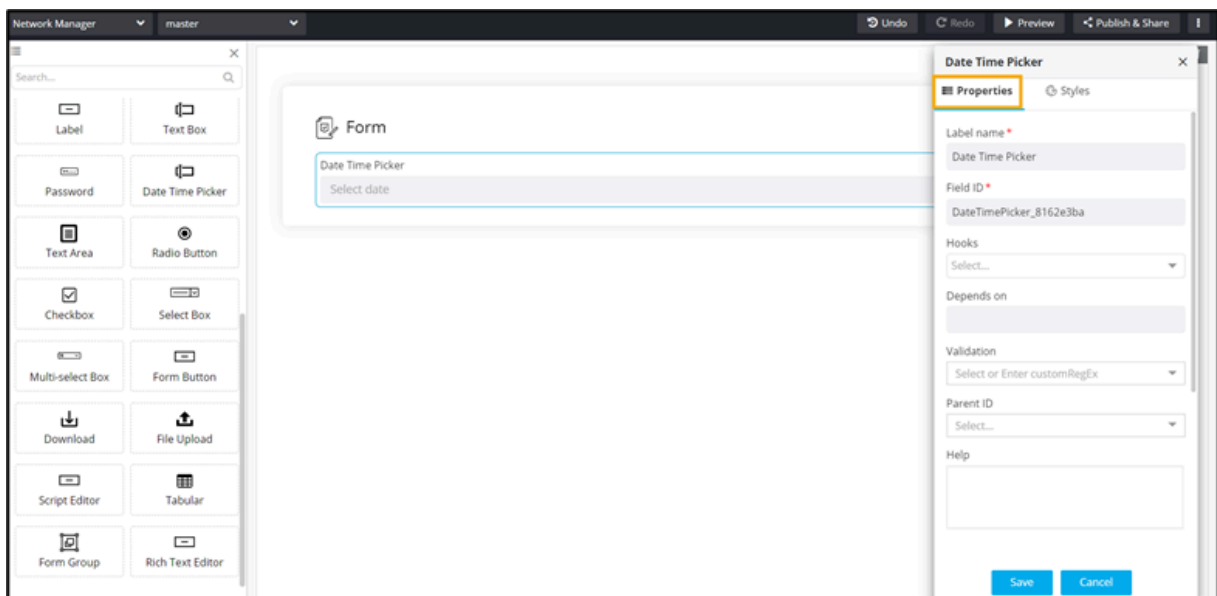
1. To add the Date Time Picker to your form, drag and drop the **Date Time Picker** component to the canvas.
 2. Click the **Date Time Picker** field.
 3. Select the date from the pop-out calendar.
 4. Select the time from the columns.
- [Configuring the Date Time Picker - Properties](#)
 - [Configuring the Date Time Picker - Styles](#)

Configuring the Date Time Picker - Properties

1. To configure the **Date Time Picker** form field, hover your mouse over the field and click .





The **Date Time Picker** pop-up window opens.



2. In the **Date Time Picker** window, under **Properties**, enter or select the required fields.

The following table describes the fields under the **Properties** tab:

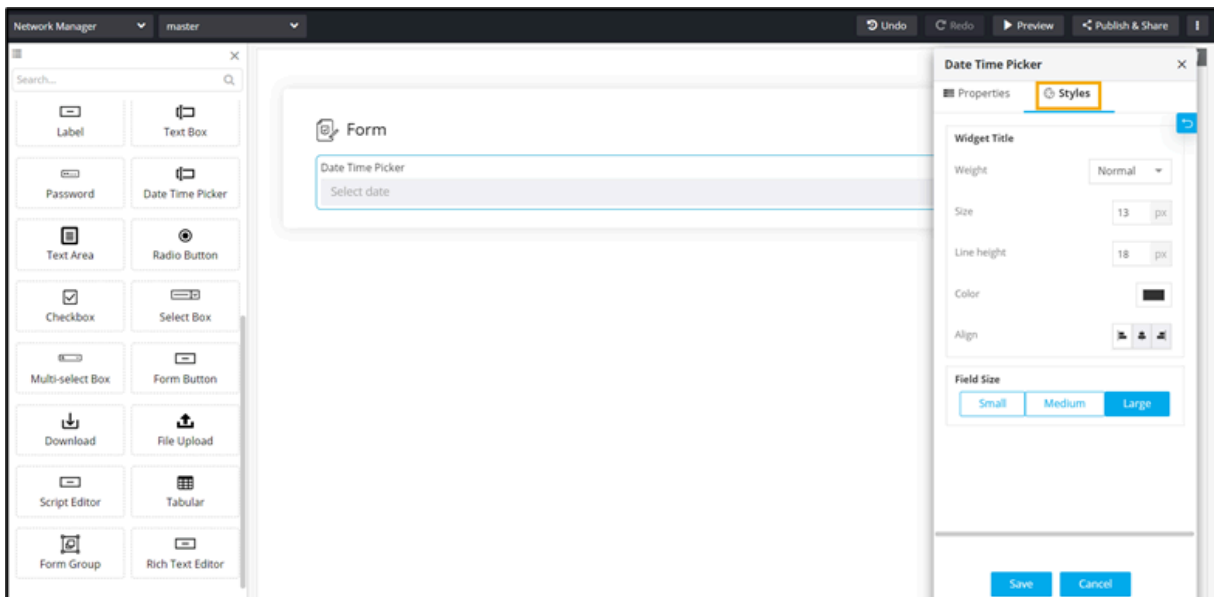
Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> Allowed characters: '-' and '_' Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> Select a hook that is relevant to the form field. Hooks can be either Script or REST API. Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #007bff; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	Allows you to define dependencies between form fields based on 'Field ID' and 'Values'. <ul style="list-style-type: none"> Operators used: '&' and ' ' Max character: 550 Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	Allows you to select or define a custom regex pattern against the specific form field. <ul style="list-style-type: none"> Select from the predefined regex patterns defined in the regex inventory. Validation ensures that you capture the right information while creating the request.
Parent ID	Allows you to assign a Parent ID for fields in a table. <ul style="list-style-type: none"> Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div style="border: 1px solid #007bff; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	Allows you to add Help text/tooltip for the field.

Field	Description
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.


Configuring the Date Time Picker - Styles

1. For more options to customize the **Date Time Picker**, in the **Date Time Picker** window, click **Styles**.



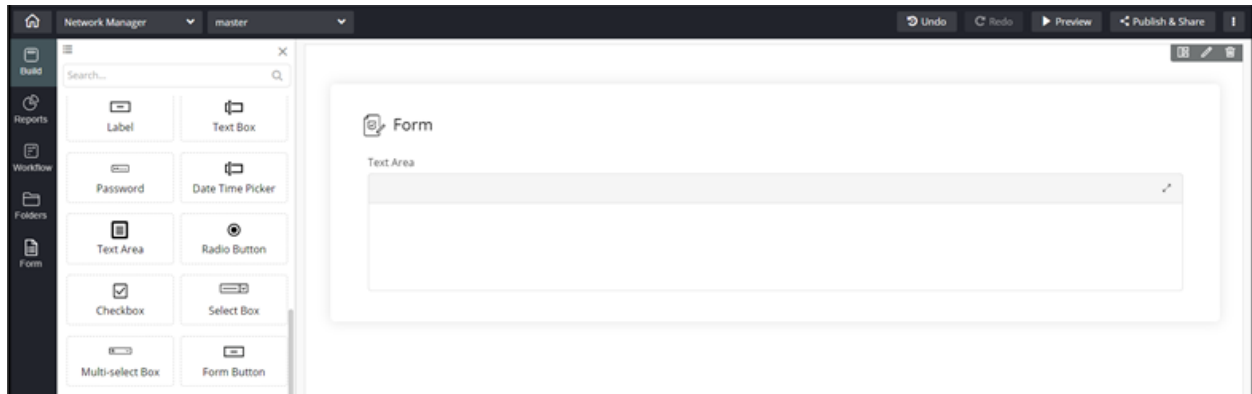
The following table describes the options available under the **Styles** tab:

Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as <ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Text Area


You can add a Text Area field to the form on your page. This form field allows you to add a multi-line text input area to the page. This can be used to collect user inputs such as comments or feedback or add a description for a form field.

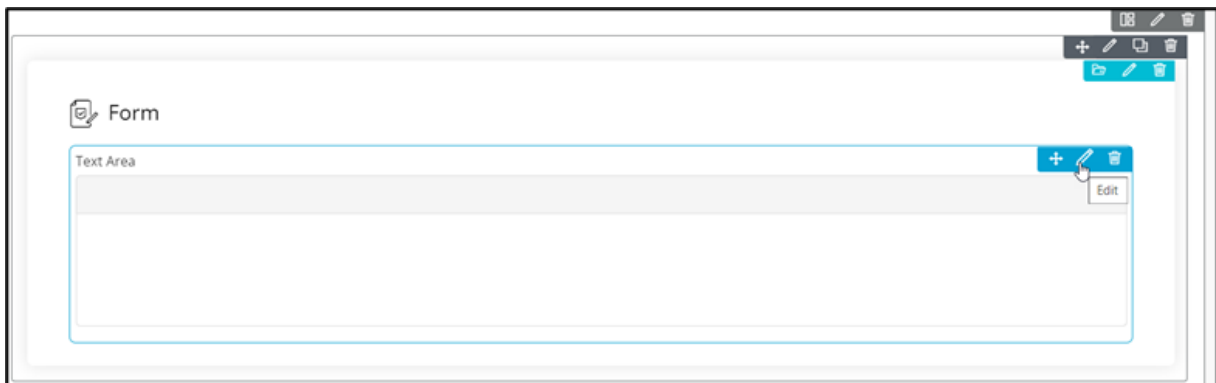


To add the Text Area field to your form, drag and drop the **Text Area** component to the build area.

- [Configuring the Text Area field - Properties](#)
- [Configuring the Text Area field - Styles](#)

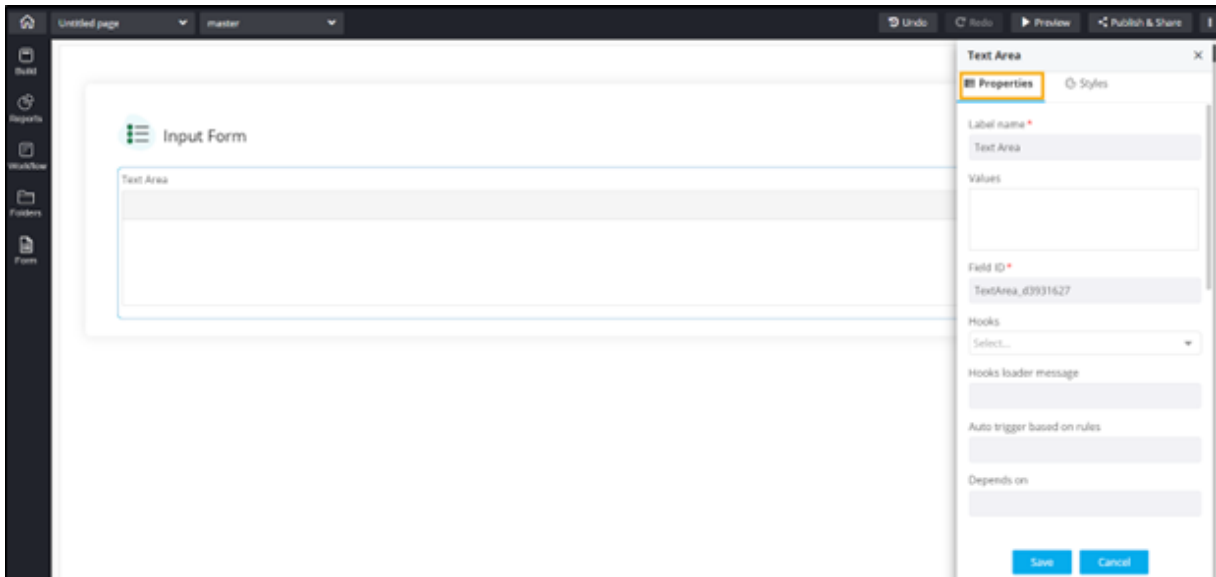
Configuring the Text Area field - Properties

1. To configure the **Text Area** field, hover your mouse over the field and click .






The **Text Area** pop-up window opens.


2. In the **Text Area** window, under **Properties**, enter or select the required fields.

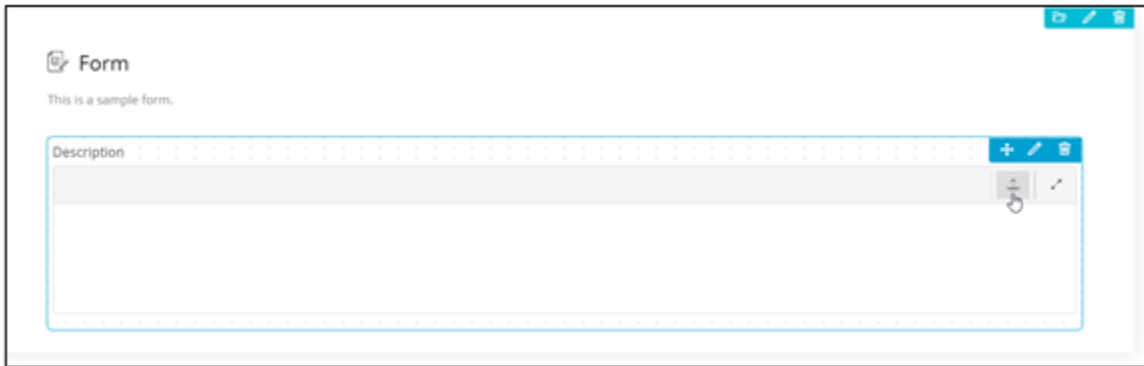



The following table describes the fields under the **Properties** tab:

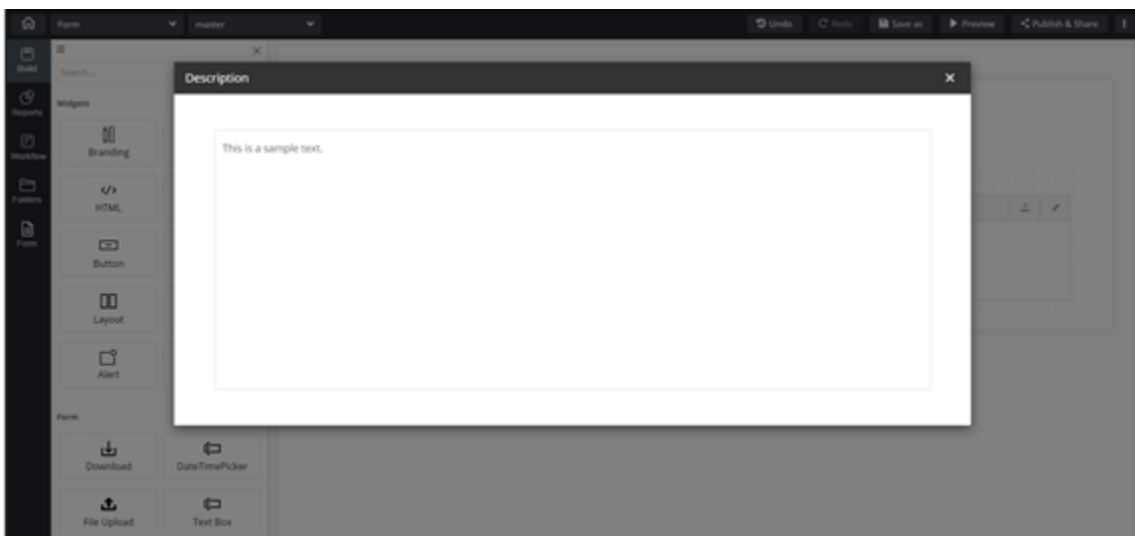
Field	Description
Label name	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p> Note: For more information on Assigning Hooks to Form Fields, click here.</p> </div>
Depends on	Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.

Field	Description
	<ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 5px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	Allows you to add Help text/tooltip for the field.
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .
Hidden	Allows you to hide the field in the form.
File upload	Allows you to add a File upload icon  in the Text Area.

3. To add a file upload icon, in the **Text Area** window, under **Properties**, turn on the **File upload** toggle.
4. To upload a file, in the text area, click  .

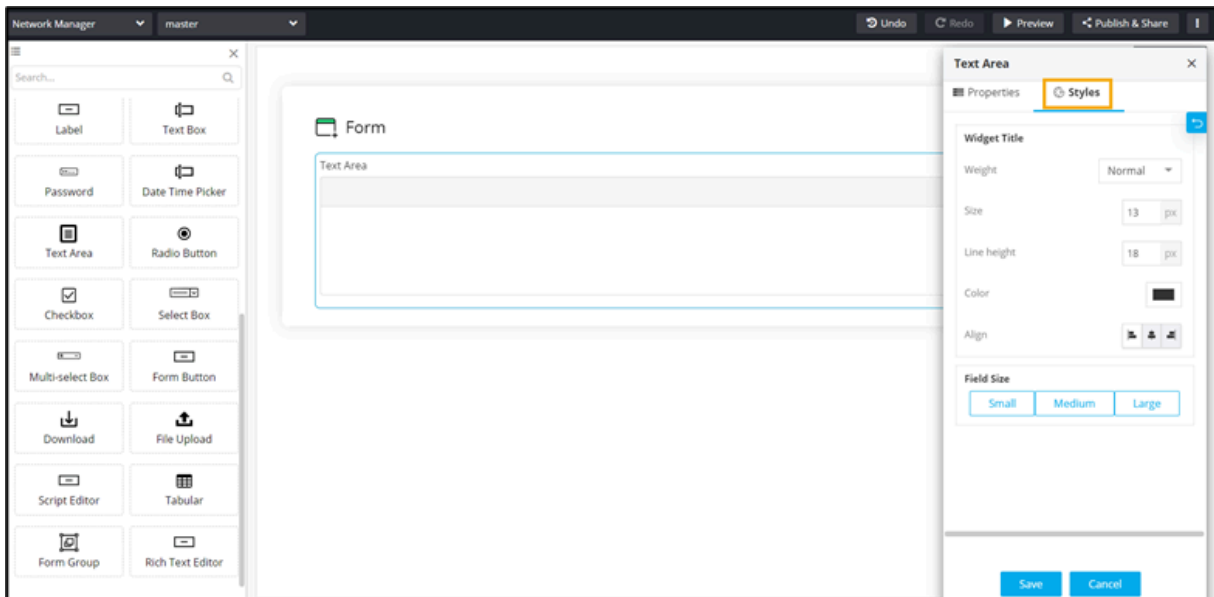


5. To maximize the text area field, from the top right corner of the field, click .



Configuring the Text Area field - Styles

1. For more options to customize the Text Area, in the **Text Area** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as

Field	Description
	<ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.

3. To restore the settings under **Styles** to default, click .

Form Field - Radio Button


You can add a Radio Button to the form on your page. This form field allows you to select one option from the predefined set of options.

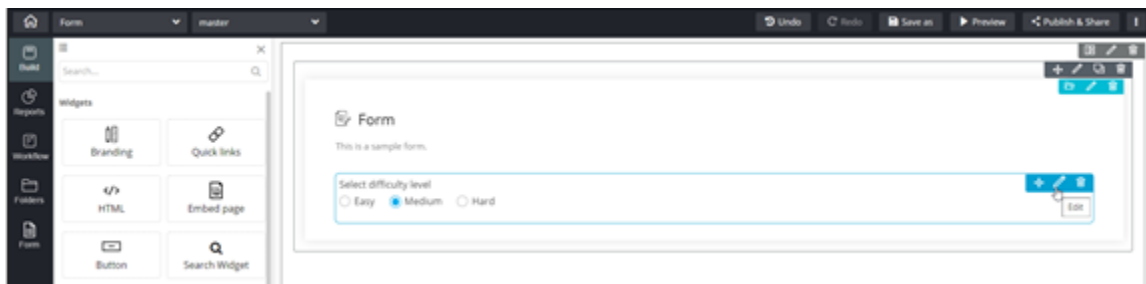


To add the Radio Button field to your form, drag and drop the **Radio Button** component to the design canvas.

- [Configuring the Radio Button field - Properties](#)
- [Configuring the Radio Button field - Styles](#)

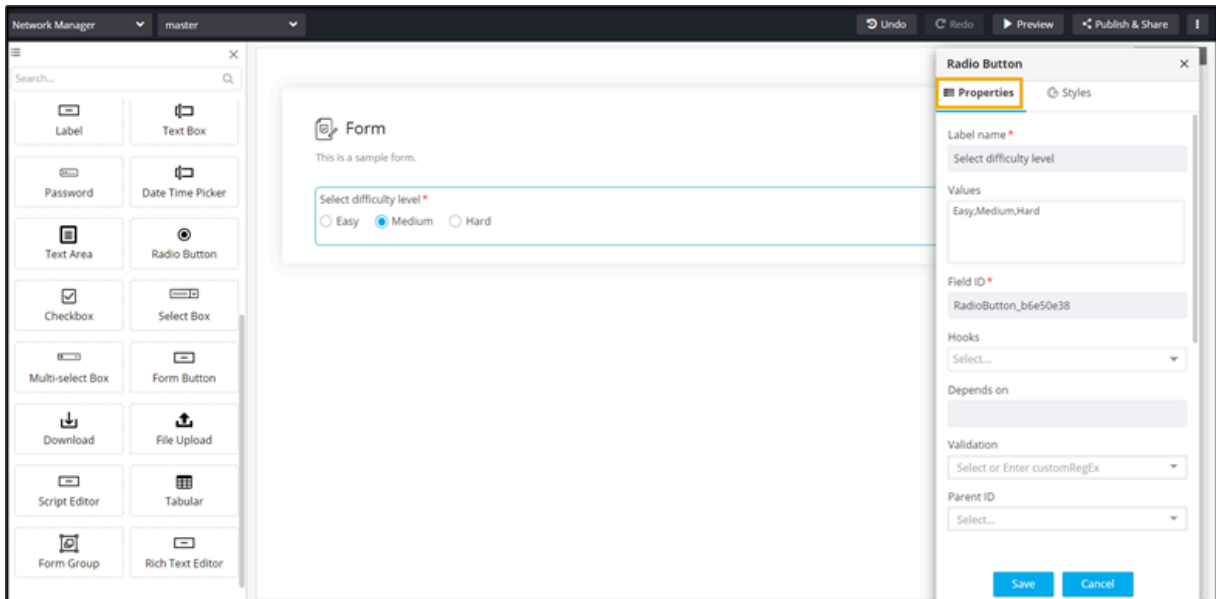
Configuring the Radio Button field - Properties

1. To configure the Radio Button, hover your mouse over the field and click .





The **Radio Button** pop-up window opens.

2. In the **Radio Button** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> Values can be delimited by a comma. Characters not allowed: '&' and ' '
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> Allowed characters: '-' and '_' Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> Select a hook that is relevant to the form field. Hooks can be either Script or REST API. Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface.

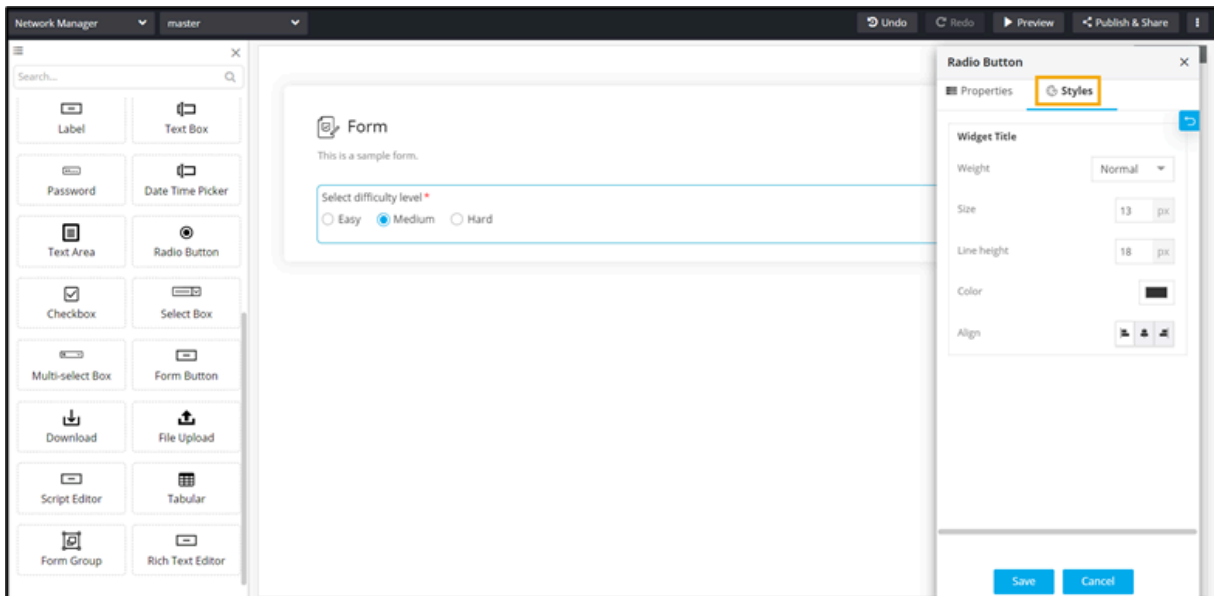
Field	Description
	 Note: For more information on Assigning Hooks to Form Fields, click here .
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to.  Note: This is used only when defining a tabular element in the form.
Help	<p>Allows you to add Help text/tooltip for the field.</p>
Profile Access	<p>Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.</p>
Mandatory	<p>Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.</p>
Read only	<p>Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.</p>
Hidden	<p>Allows you to hide the field in the form.</p>
Global variable	<p>Allows you to define this field as a Global Variable.</p>

Field	Description
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.

Configuring the Radio Button field - Styles


1. For more options to customize the Radio Button, in the **Radio Button** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

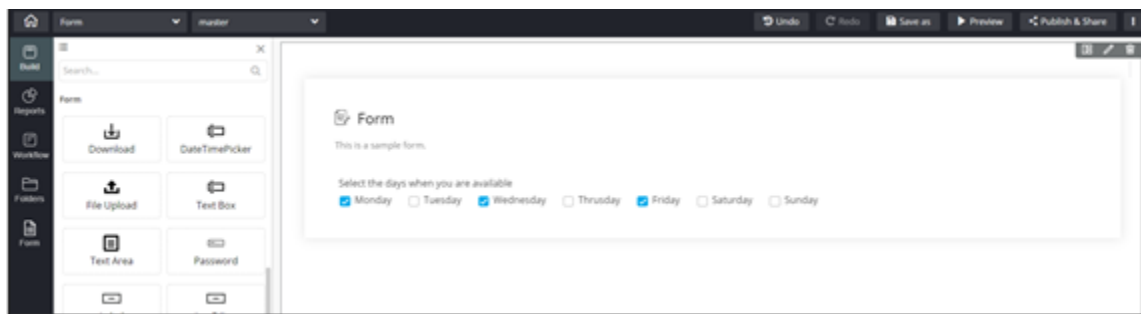
Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.

Field	Description
Align	Allows you to align the field name to the left, center or right side of the field.

- To save your settings, click **Save**.
- To restore the settings under **Styles** to default, click .

Form Field - Checkbox


You can add a Checkbox field to the form on your page. This form field allows you to make one or more choice(es) from the available options.

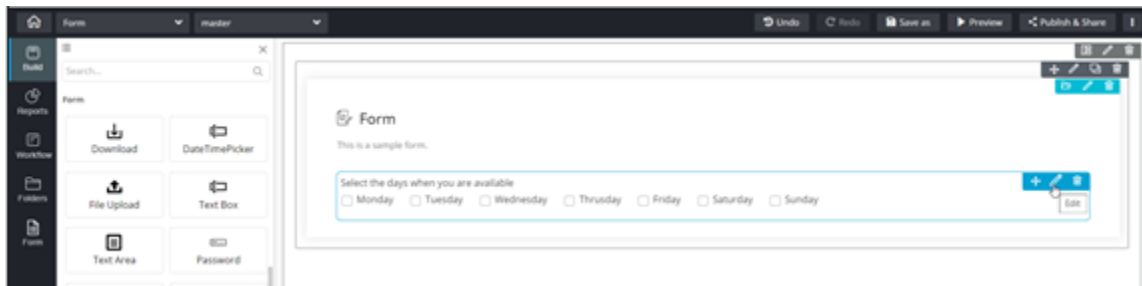


To add the Checkbox field to your form, drag and drop the **Checkbox** component to the design canvas.

- [Configuring the Checkbox field - Properties](#)
- [Configuring the Checkbox field - Styles](#)

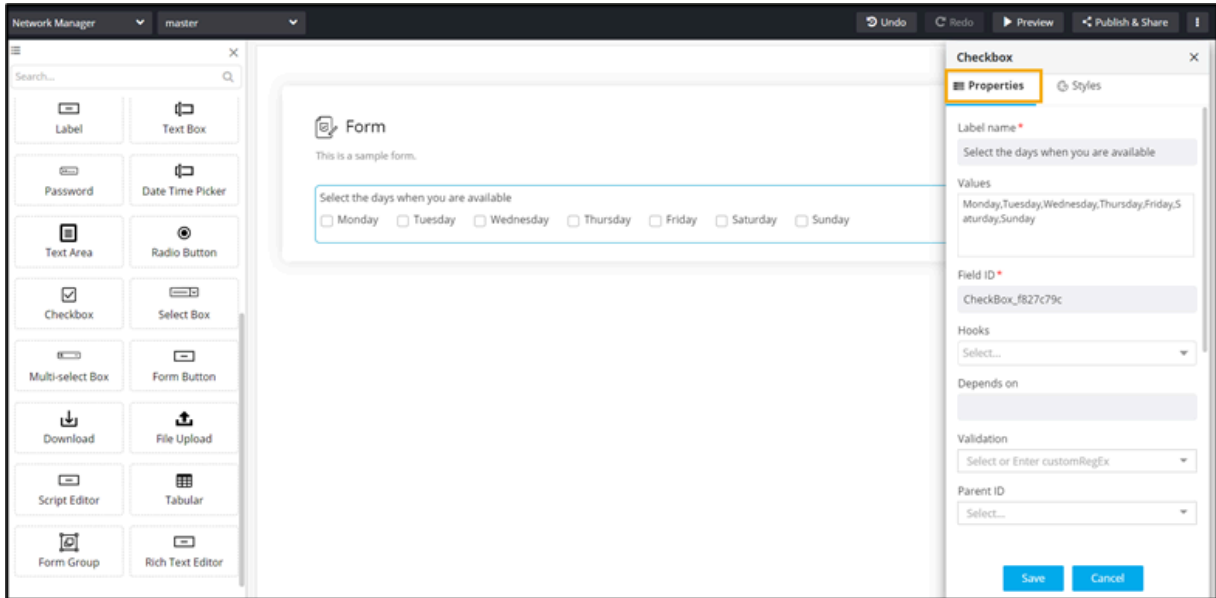
Configuring the Checkbox field - Properties

- To configure the Checkbox, hover your mouse over the field and click .





The **Checkbox** pop-up window opens.

- In the **Checkbox** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface.

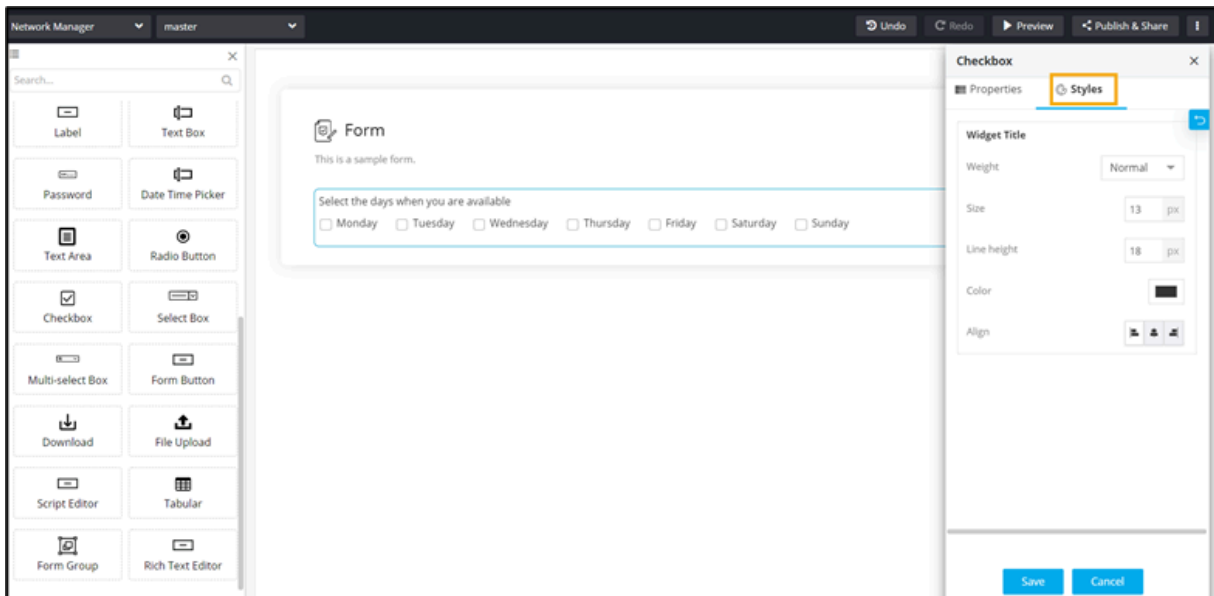
Field	Description
	<div data-bbox="513 275 1419 394" style="border: 1px solid #add8e6; border-radius: 10px; padding: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div data-bbox="513 1136 1419 1220" style="border: 1px solid #add8e6; border-radius: 10px; padding: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	<p>Allows you to add Help text/tooltip for the field.</p>
Profile Access	<p>Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.</p>
Mandatory	<p>Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.</p>
Read only	<p>Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.</p>
Global variable	<p>Allows you to define this field as a Global Variable.</p>

Field	Description
	All Asterisk (*) marked fields are mandatory.

3. Click **Save**.

Configuring the Checkbox field - Styles


1. For more options to customize the Checkbox, in the **Checkbox** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

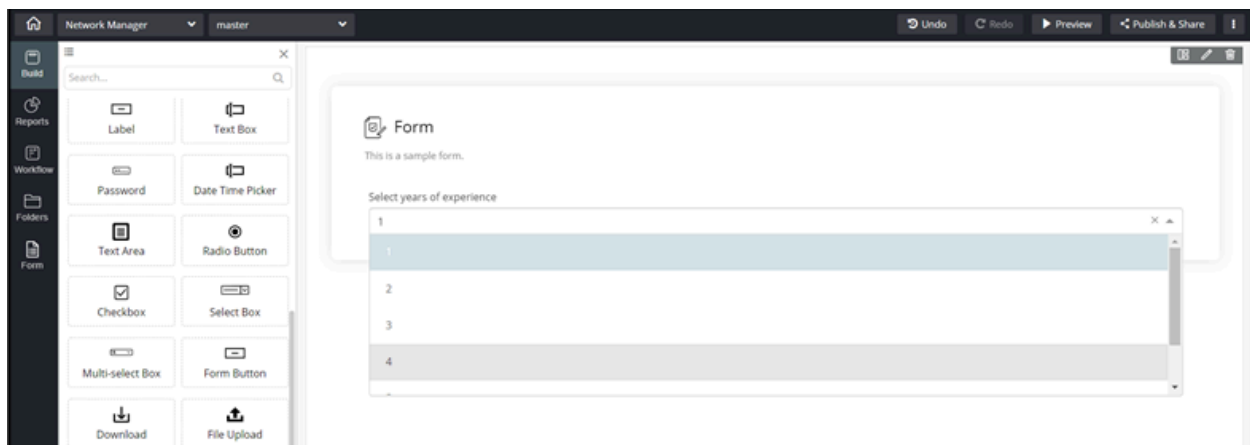
Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.

Field	Description
Align	Allows you to align the field name to the left, center or right side of the field.

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Select Box


You can add a select box to the form on your page. This form field allows you to select one of the predefined options listed in the dropdown.

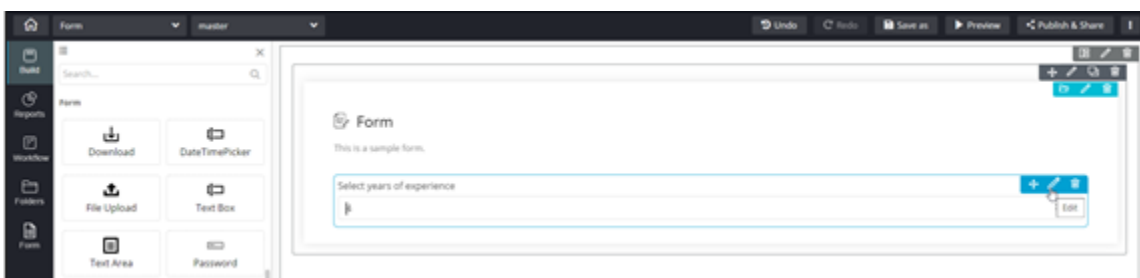


To add the Select Box field to your form, drag and drop the **Select Box** component to the design canvas.

- [Configuring the Select Box field - Properties](#)
- [Configuring the Select Box field - Styles](#)

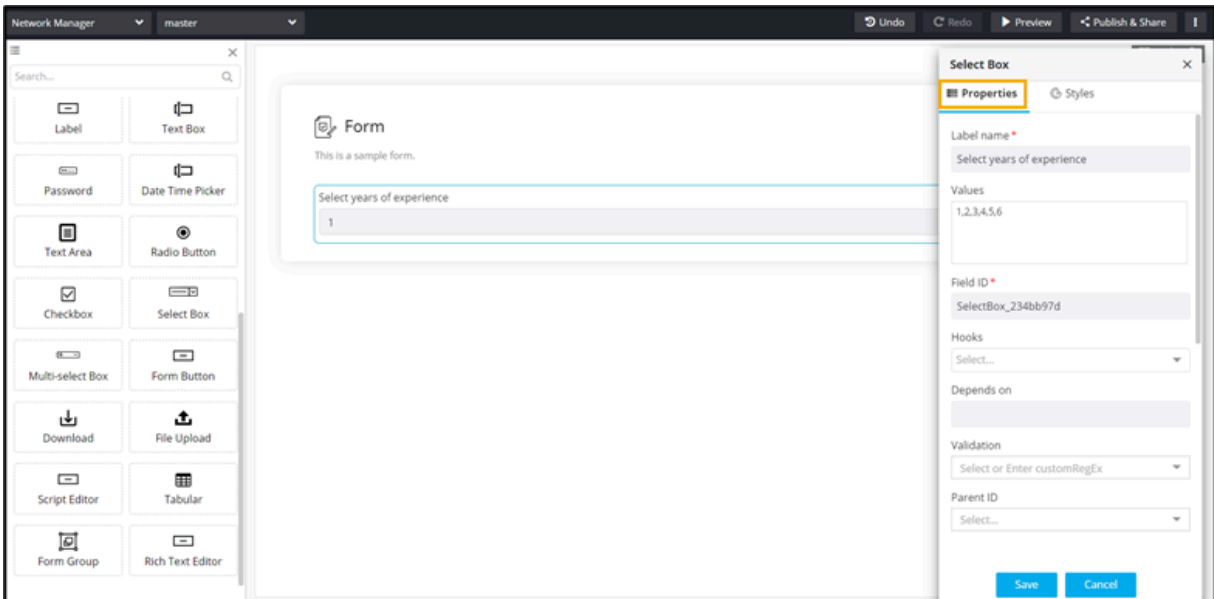
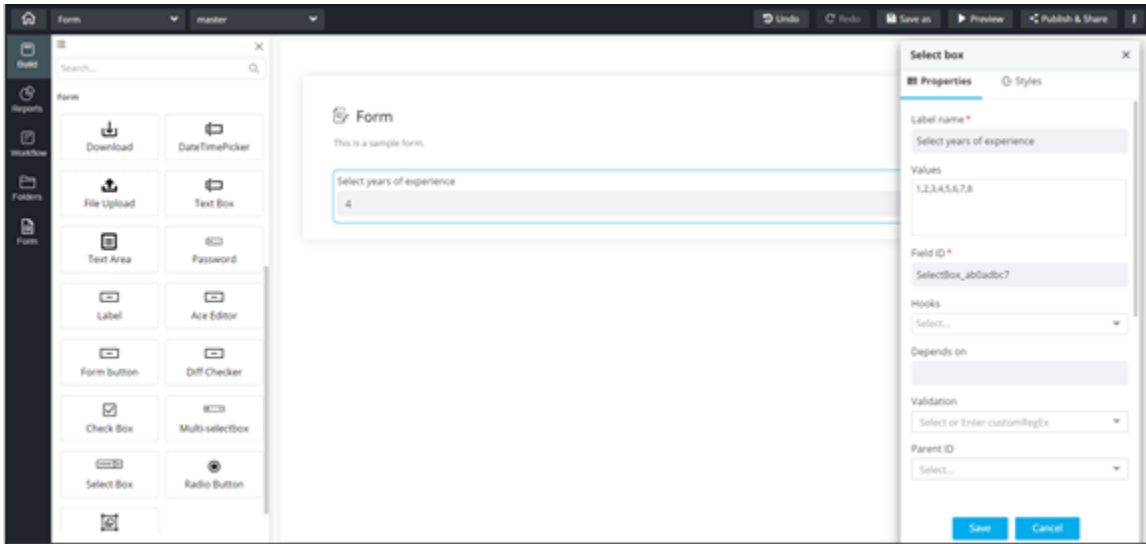
Configuring the Select Box field - Properties

1. To configure the Select Box, hover your mouse over the field and click .





The **Select Box** pop-up window opens.

2. In the **Select Box** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field.

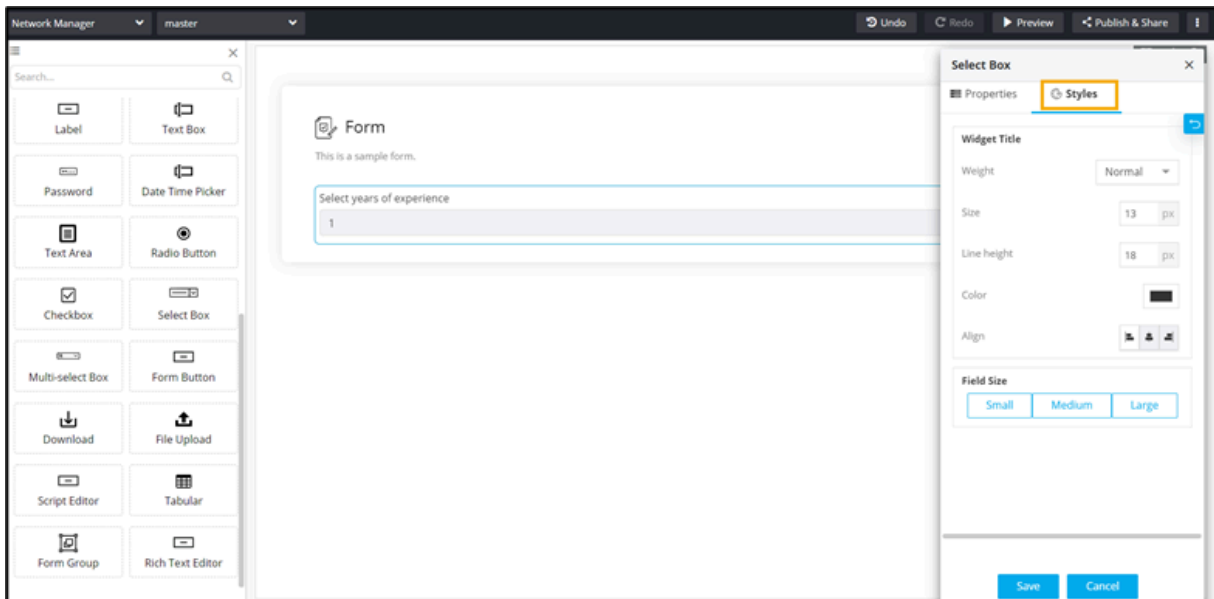
Field	Description
	<ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID*	<p>Allows you to assign a unique Field ID to refer to the field name.</p> <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	<p>Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date.</p> <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div data-bbox="516 867 1419 999" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div data-bbox="516 1738 1419 1822" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>

Field	Description
Help	Allows you to add Help text/tooltip for the field.
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .
Create option	
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.


Configuring the Select Box field - Styles

1. For more options to customize the Select Box, in the **Select Box** window, click **Styles**.



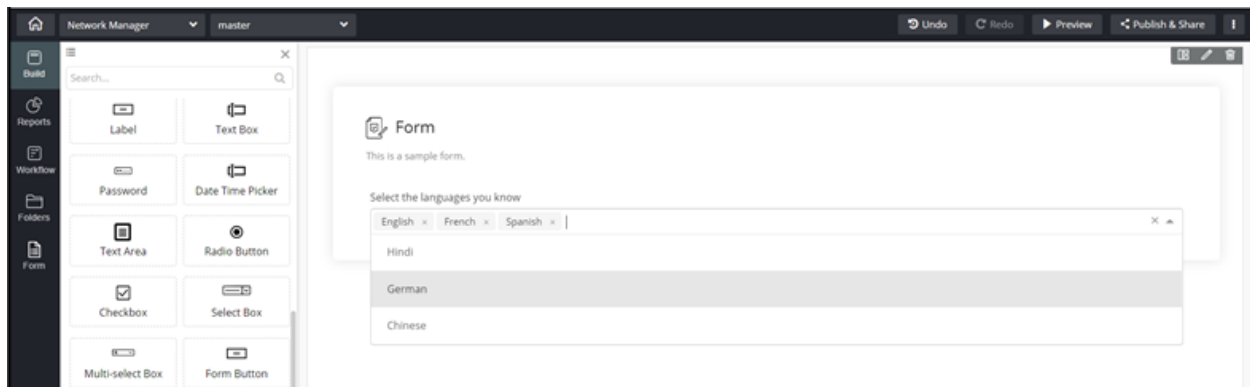
The following table describes the options available under the **Styles** tab:

Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as <ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Multi-select Box


You can add a Multi-select box to the form on your page. This form field allows you to select from a predefined list of multiple options available in a dropdown.

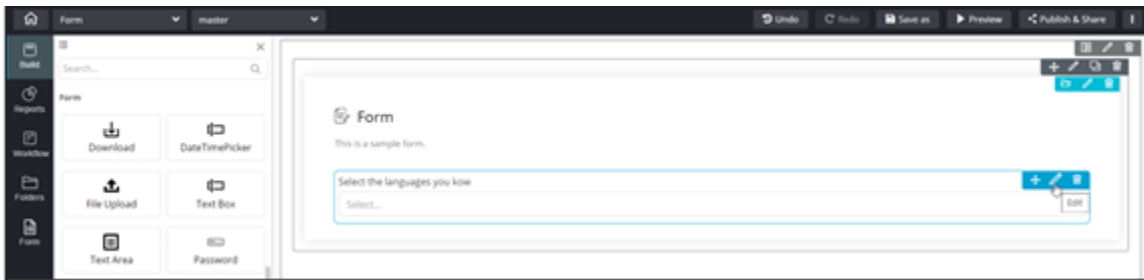


To add the Multi-select Box field to your form, drag and drop the **Multi-select Box** component to the design canvas.

- [Configuring the Multi-select Box field - Properties](#)
- [Configuring the Multi-select Box field - Styles](#)

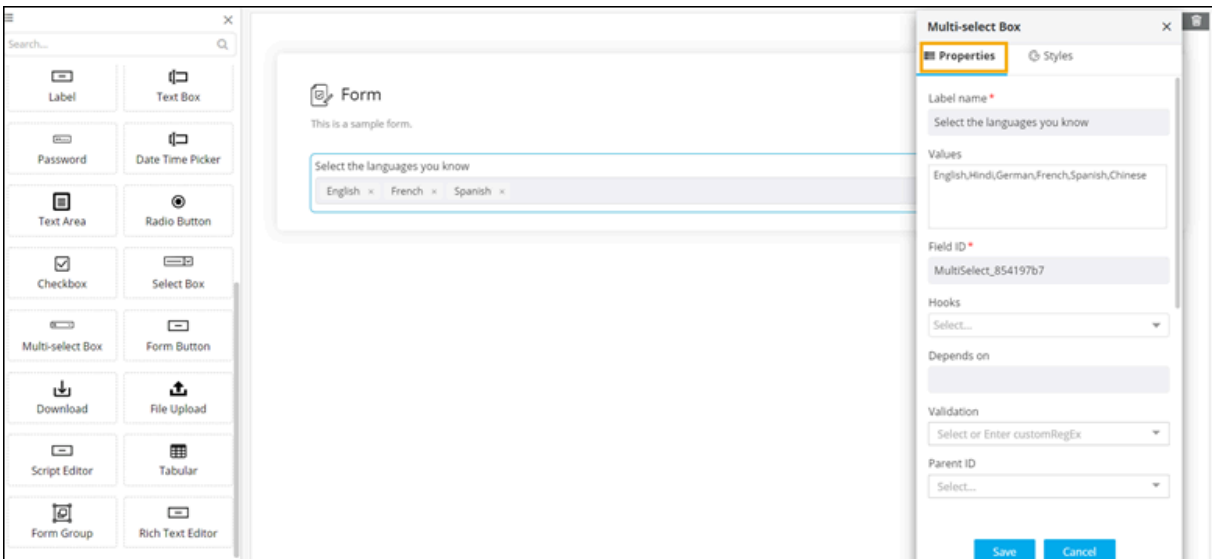
Configuring the Multi-select Box field - Properties

1. To configure the Multi-select box, hover your mouse over the field and click .




The **Multi-select** pop-up window opens.


2. In the **Multi-select** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name	Enter a valid Label name for the form field. For example, Select Date and Time.

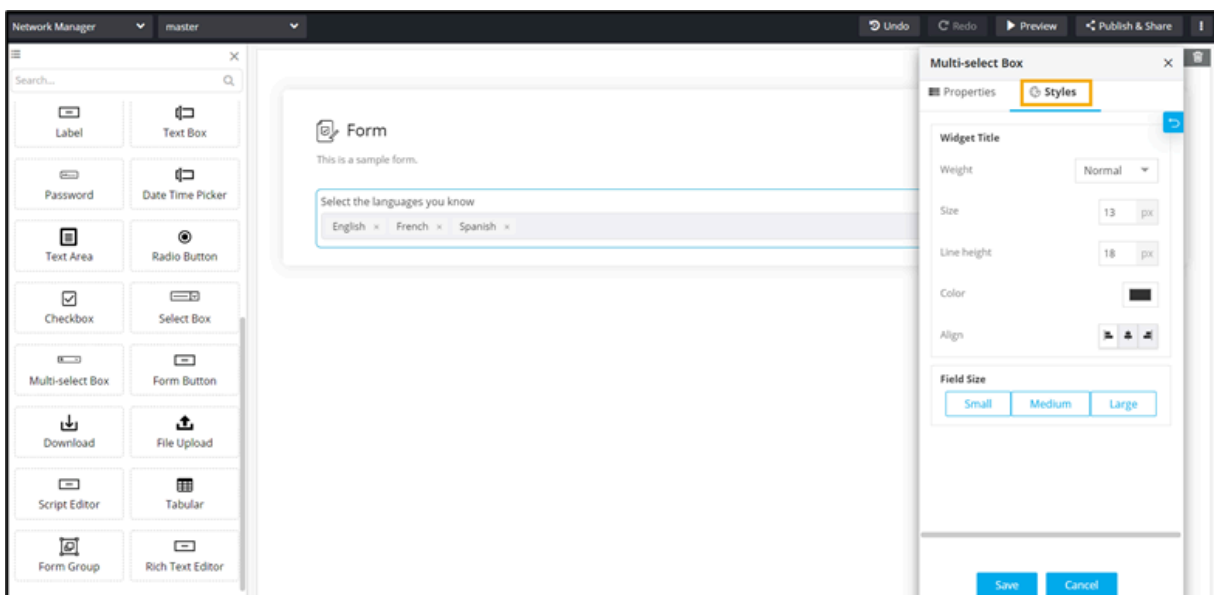
Field	Description
Values	<p>Allows you to define field Values relevant to a form field.</p> <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID	<p>Allows you to assign a unique Field ID to refer to the field name.</p> <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	<p>Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date.</p> <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div data-bbox="500 953 1419 1087" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to.

Field	Description
	 Note: This is used only when defining a tabular element in the form.
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .
Create option	Allows you to define this field as a Global variable .
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.


Configuring the Multi-select Box field - Styles

1. For more options to customize the Multi-select Box, in the **Multi-select Box** window, click **Styles**.



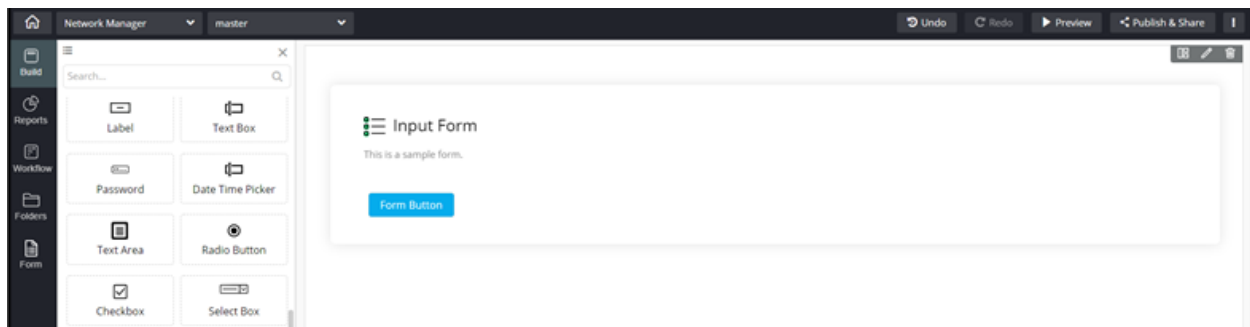
The following table describes the options available under the **Styles** tab:

Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as <ul style="list-style-type: none"> • Small • Medium • Large

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Form Button


You can add a Form Button field to the form on your page. This form field allows you to add a button to your form to fetch information such as device list, list of certificate authorities and so on.

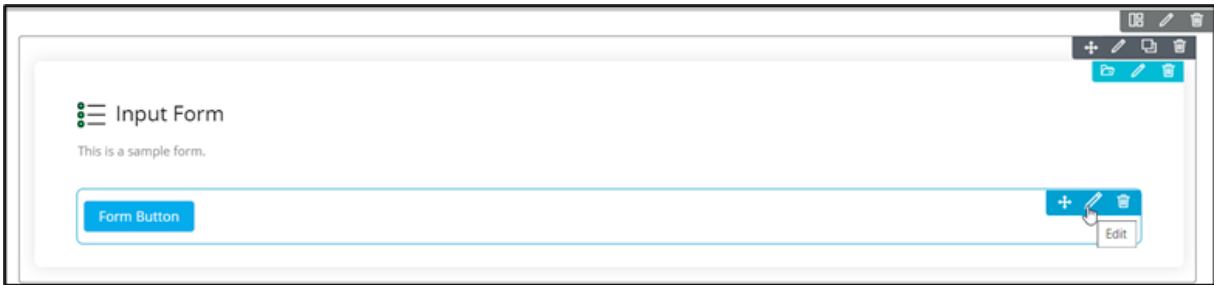


To add the Form Button field to your form, drag and drop the **Form Button** component to the design canvas.

- [Configuring the Form Button field - Properties](#)
- [Configuring the Form Button field - Styles](#)

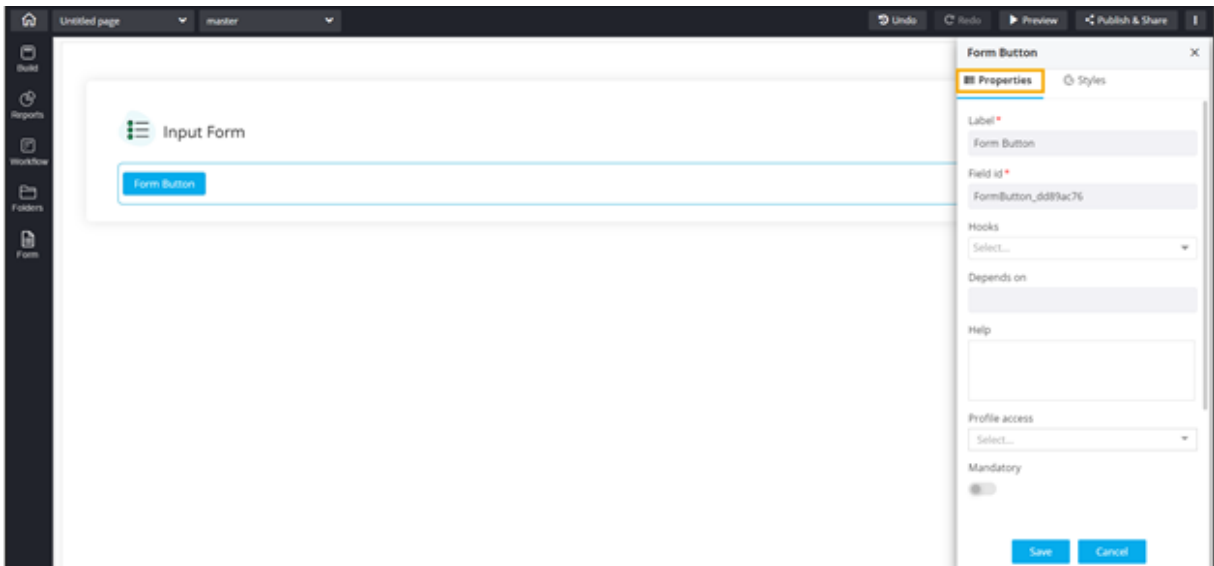
Configuring the Form Button field - Properties

1. To configure the Form Button, hover your mouse over the field and click .




The **Form Button** pop-up window opens.

2. In the **Form Button** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

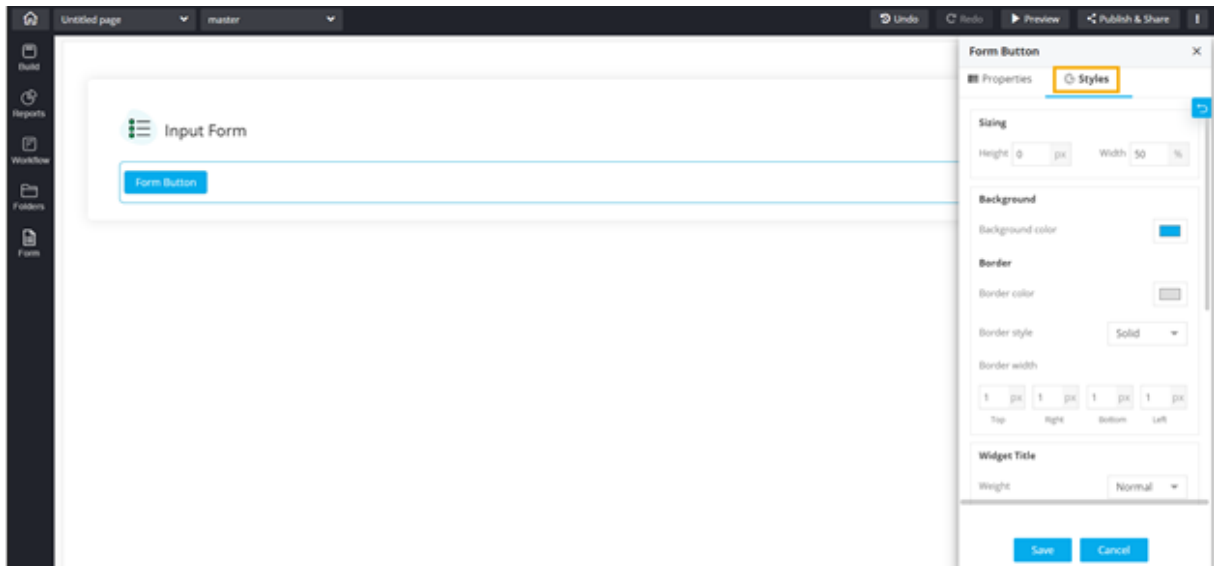
Field	Description
Label	Enter a valid Label name for the form field. For example, Select Date and Time.
Field ID	Allows you to assign a unique Field ID to refer to the field name.

Field	Description
	<ul style="list-style-type: none"> Allowed characters: '-' and '_' Character Length: Min (1), Max (50)
Help	Allows you to add Help text/tooltip for the field.
Hooks	<p>Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date.</p> <ul style="list-style-type: none"> Select a hook that is relevant to the form field. Hooks can be either Script or REST API. Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #00aaff; border-radius: 10px; padding: 5px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> Operators used: '&' and ' ' Max character: 550 Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Hidden	Allows you to hide the field in the form.
Select icons	Allows you to select an icon for the Form Button from the available options.

3. Click **Save**.

Configuring the Form Button field - Styles


1. For more options to customize the Form Button, in the **Form Button** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

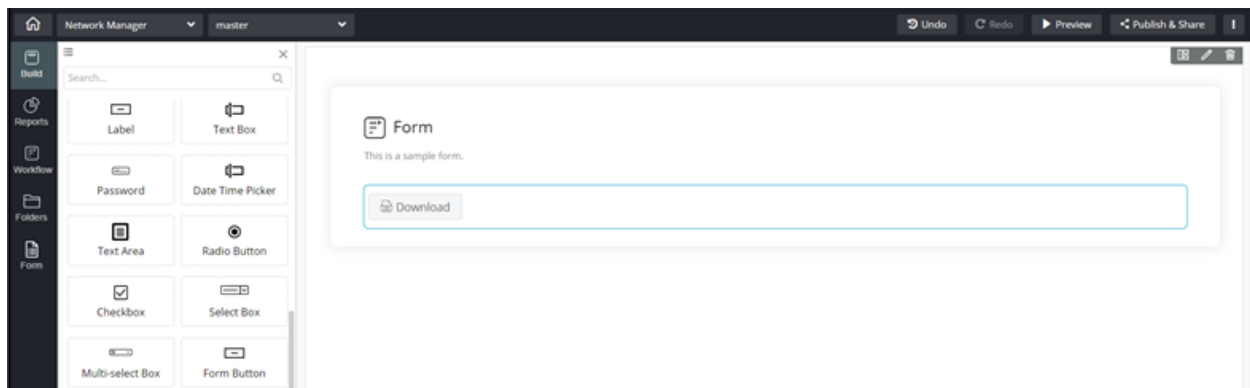
Field	Description
Sizing	
Background	Allows you to select the color of the form button.
Border	Allows you to define the color, style, and width of the button's border.
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values: <ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.
Field Size	Allows you to define the size of the form field as

Field	Description
	<ul style="list-style-type: none"> • Small • Medium • Large

- To save your settings, click **Save**.
- To restore the settings under **Styles** to default, click .


Form Field - Download

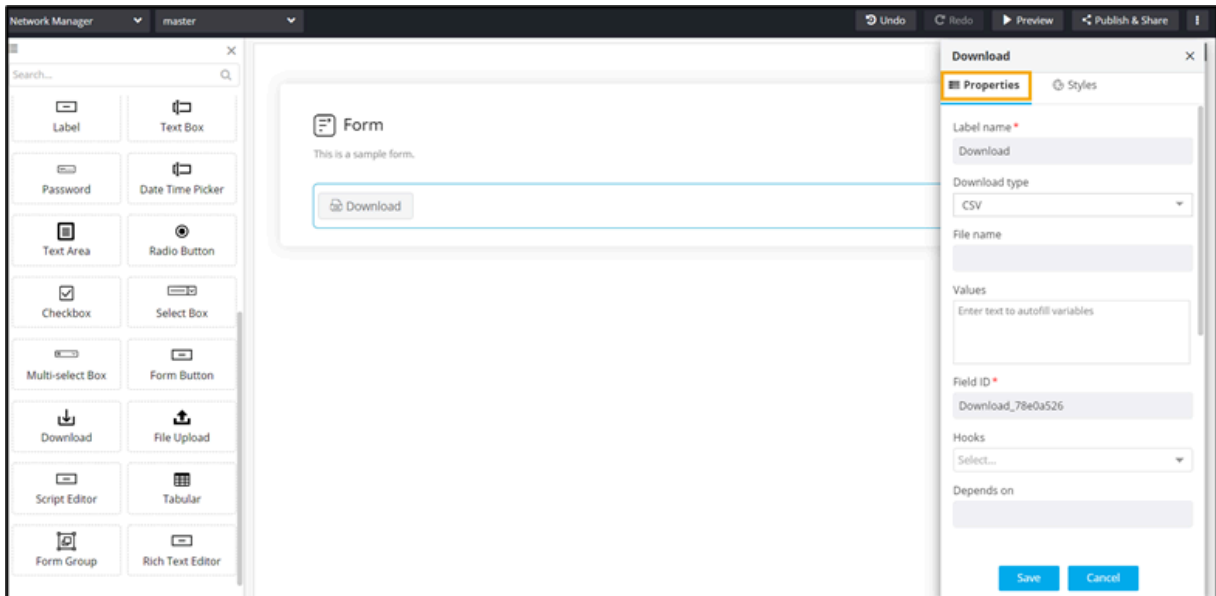
You can add a Download field to the form on your page. This form field serves as a URL/button which you can click to download files(s).



- To add the Download field to your form, drag and drop the **Download** component to the design canvas.
- Click on the Download link or button to download your file.
 - [Configuring the Download field - Properties](#)
 - [Configuring the Download field - Styles](#)



Configuring the Download field - Properties

- To configure the **Download** widget, hover your mouse over the widget and click . The **Download** pop-up window opens.
- In the **Download** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

Field	Description
Label name	Enter a valid Label name for the form field. For example, Download CSV.
Download Type	Select the Download type from the available options: <ul style="list-style-type: none"> • URL • File • CSV
File Name	Enter the file name with which the file will be downloaded to your machine.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date.

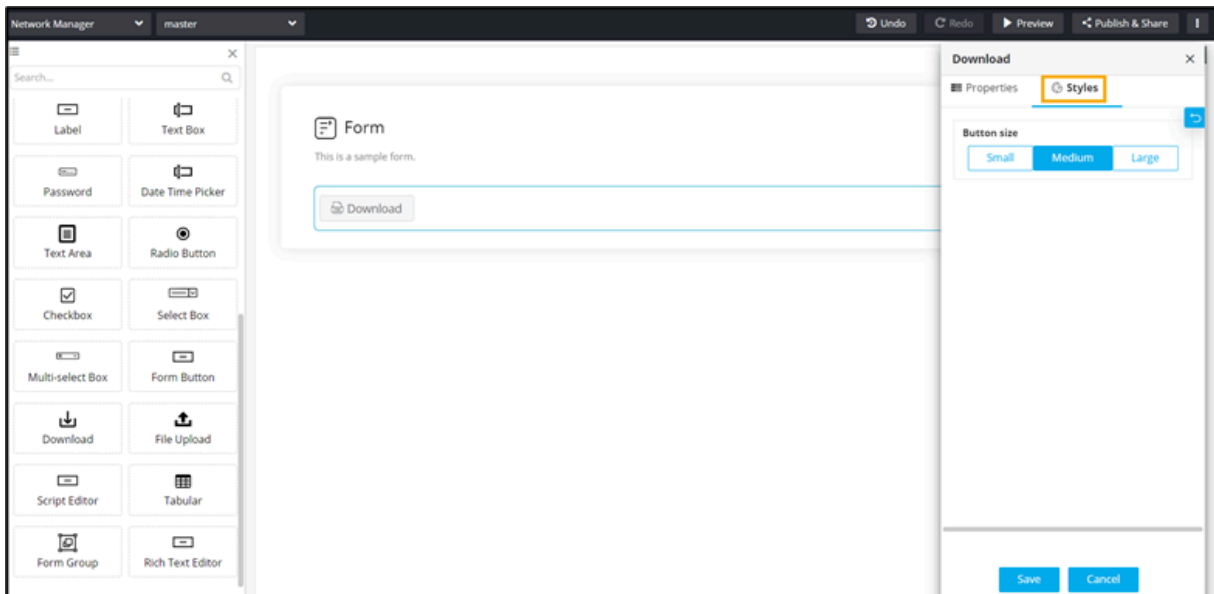
Field	Description
	<ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div data-bbox="508 470 1419 604" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	<p>Allows you to select or define a custom regex pattern against the specific form field.</p> <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	<p>Allows you to assign a Parent ID for fields in a table.</p> <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div data-bbox="508 1461 1419 1549" style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	<p>Allows you to add Help text/tooltip for the field.</p>
Mandatory	<p>Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.</p>

Field	Description
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .

3. Click **Save**.

Configuring the Download field - Styles

1. For more options to customize the Download, in the **Download** window, click **Styles**.



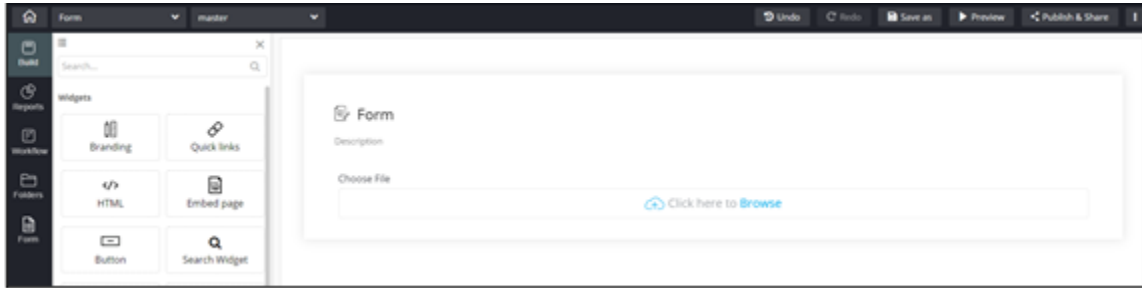
2. Under **Button Size**, select the size of the Download button as **Small**, **Medium** or **Large** as required.


3. To save your settings, click **Save**.

4. To restore the settings under **Styles** to default, click .


Form Field - File Upload

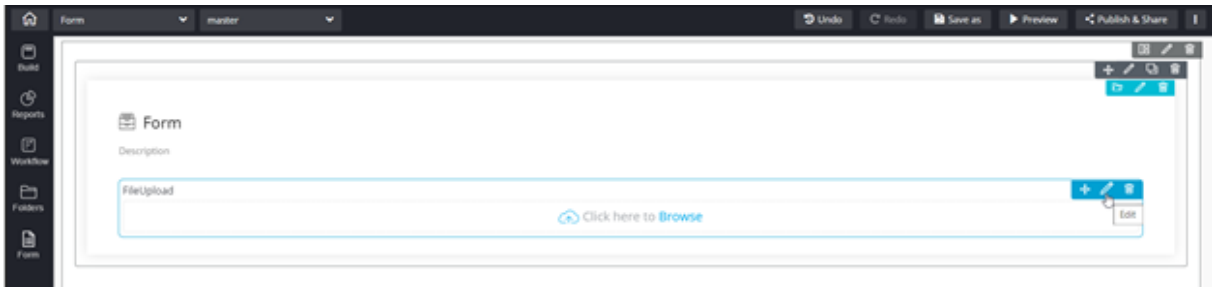
You can add a File Upload field to the form on your page. This form field allows you to attach files from your machine to the form.



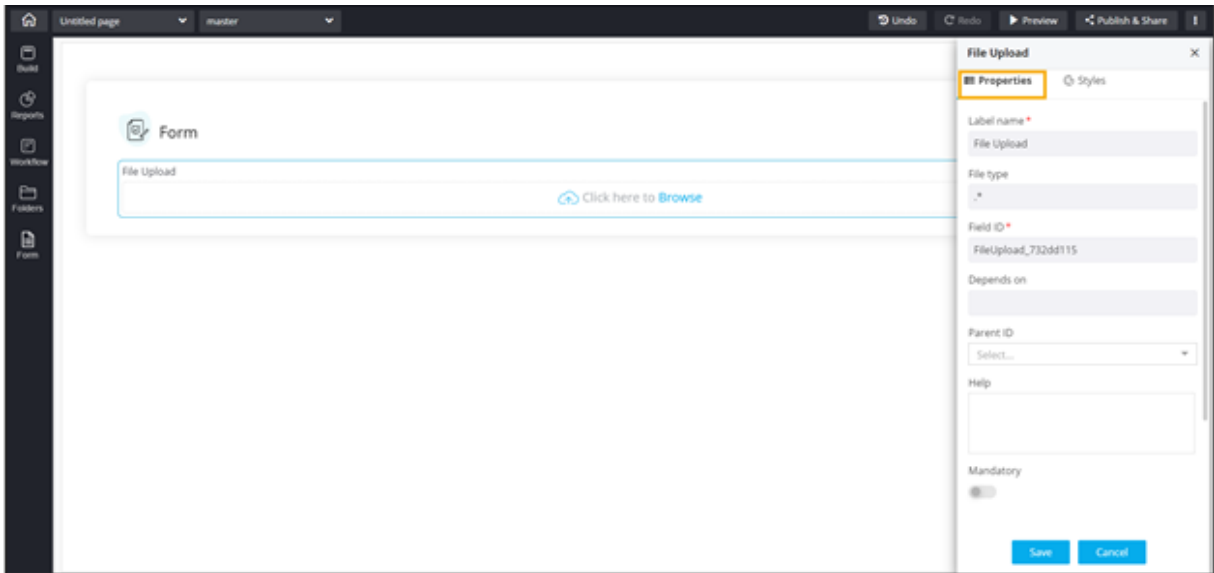
1. To add the File Upload field to your form, drag and drop the **File Upload** component to the design canvas.
 2. To browse for files to be uploaded from your machine to the page, click  .
- [Configuring the File Upload field - Properties](#)
 - [Configuring the File Upload field - Styles](#)

Configuring the File Upload field - Properties

1. To configure the **File Upload** widget, hover your mouse over the widget and click  .
The **File Upload** pop-up window opens.




2. In the **File Upload** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

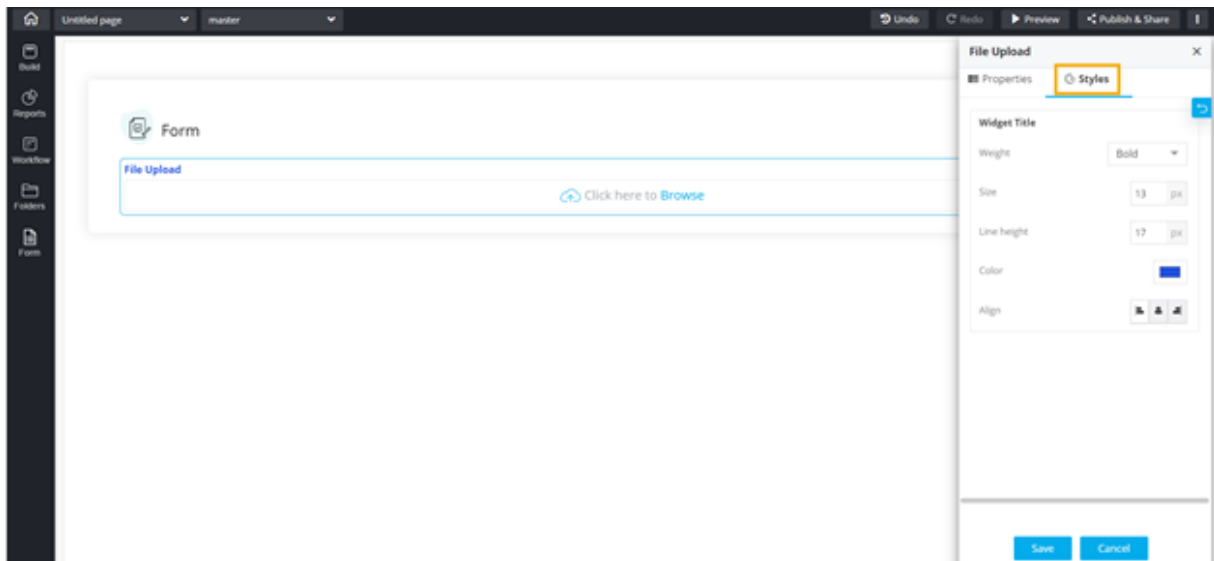
Field	Description
Label name	Enter a valid Label name for the form field. For example, Chose File.
File Type	
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Global variable	Allows you to define this field as a Global Variable .
Depends on	Allows you to define dependencies between form fields based on 'Field ID' and 'Values'. <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Parent ID	Allows you to assign a Parent ID for fields in a table. <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to.

Field	Description
	 Note: This is used only when defining a tabular element in the form.
Help	Allows you to add Help text/tooltip for the field.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.

3. Click **Save**.

Configuring the File Upload field - Styles


1. For more options to customize the File Upload, in the **File Upload** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Weight	The Weight dropdown list lets you set the font thickness of the field label using one of the following values:

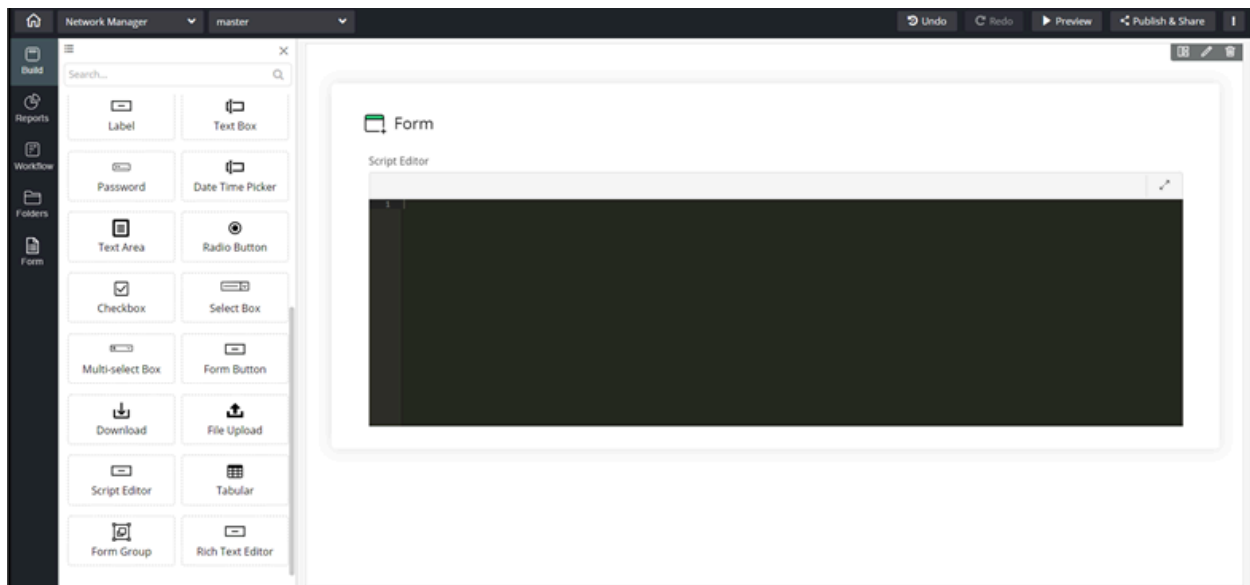
Field	Description
	<ul style="list-style-type: none"> • Default • Light • Normal • Thick
Size	Allows you to increase/decrease font size of the field name.
Line Height	Allows you to increase/decrease the line height of the field. This means the space between the field and the field border.
Color	Allows you to define the color of the field name.
Align	Allows you to align the field name to the left, center or right side of the field.

2. To save your settings, click **Save**.
3. To restore the settings under **Styles** to default, click .

Form Field - Script Editor


This form field allows you to add a code editor field to the form on your page.

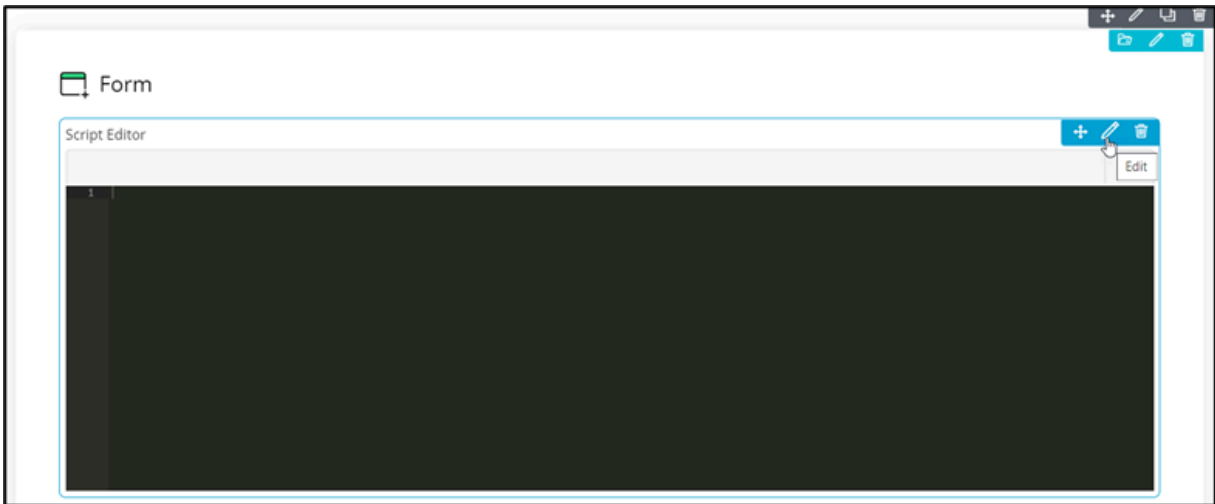
To add the Script Editor widget, drag and drop the **Script Editor** component to any blue highlighted area in the build area.



- [Configuring the Script Editor- Properties](#)
- [Configuring the Script Editor- Styles](#)

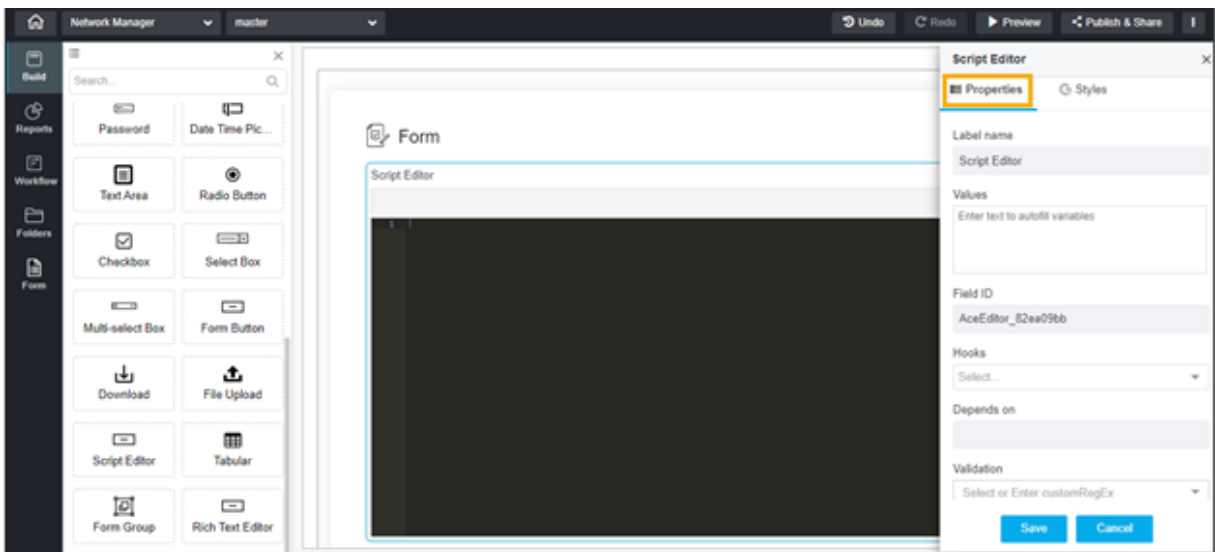
Configuring the Script Editor- Properties

1. To configure the **Script Editor**, hover your mouse over the field and click .





The **Script Editor** pop-up window opens.

2. In the **Script Editor** window, under **Properties**, enter or select the required fields.



The following table describes the fields under the **Properties** tab:

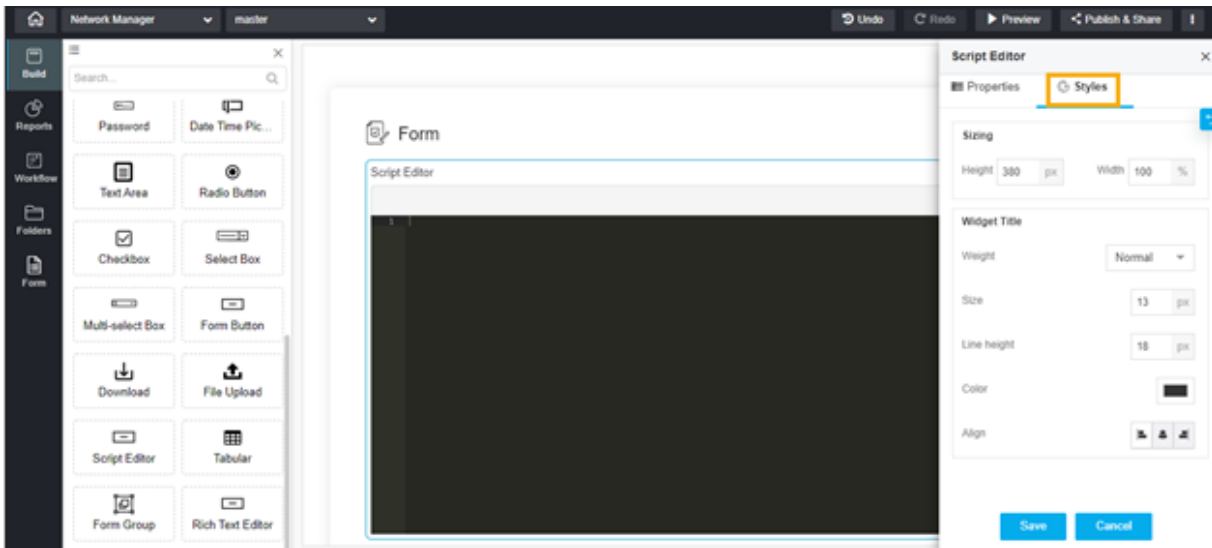
Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: For more information on Assigning Hooks to Form Fields, click here. </div>
Depends on	Allows you to define dependencies between form fields based on 'Field ID' and 'Values'. <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Validation	Allows you to select or define a custom regex pattern against the specific form field. <ul style="list-style-type: none"> • Select from the predefined regex patterns defined in the regex inventory. • Validation ensures that you capture the right information while creating the request.
Parent ID	Allows you to assign a Parent ID for fields in a table. <ul style="list-style-type: none"> • Select the relevant tabular component (Field ID) against which the form field must be mapped to. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;">  Note: This is used only when defining a tabular element in the form. </div>
Help	Allows you to add Help text/tooltip for the field.

Field	Description
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
Global variable	Allows you to define this field as a Global Variable .
Hidden	Allows you to hide the field in the form.
File Upload	Allows you to add an option for uploading files to the ace editor field.
Theme	Allows you to select between a light or dark theme for the ace editor.
Mode	Allows you to select the script from the drop down menu.
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.

Configuring the Script Editor- Styles

1. For more options to customize the Script Editor, in the **Script Editor** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Sizing	Allows you to adjust the height and width of the Ace Editor field in the form.
Widget Title	The following options are available here: <ul style="list-style-type: none"> • Weight - Allows you to set the font thickness of the widget title as Default, Light, Normal, or Thick. • Size - Allows you to increase/decrease the size of the widget title. • Line height - Allows you to adjust the line height. • Color - Allows you to set a color for the widget title. • Align - Allows you to align the widget title to the left, right, or centre.

2. To save your settings, click **Save**.

3. To restore the settings under **Styles** to default, click .

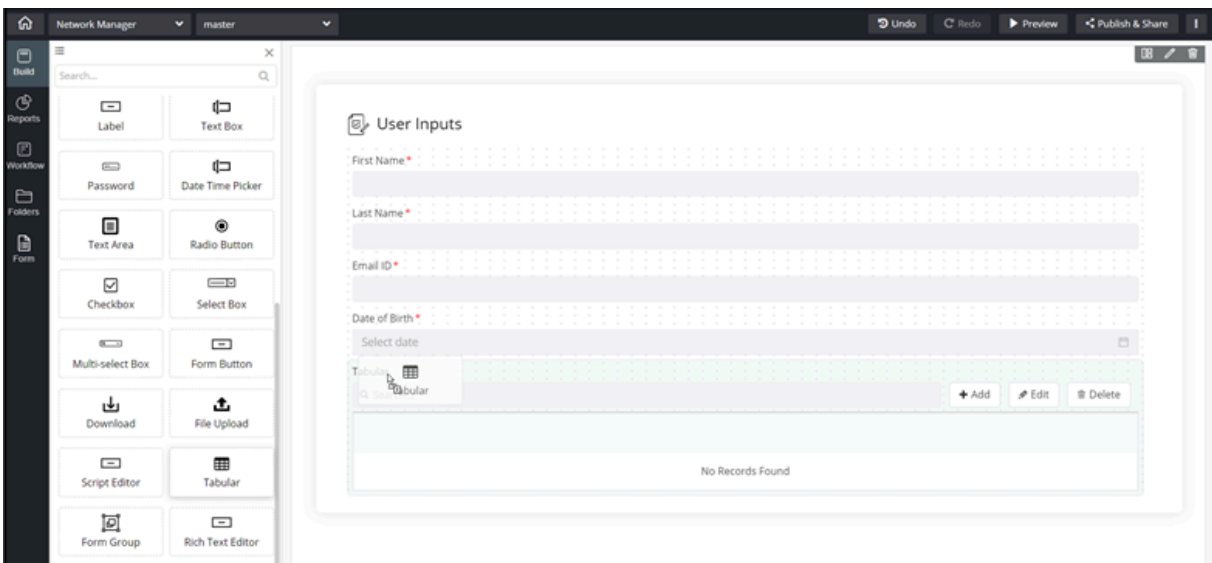
Form Field - Tabular


You can add a Tabular field to the form on your page. This field allows you to configure a table within your form by associating the field ID of the tabular as the Parent ID for the form fields required in the table.

1. To add a Tabular element to the form first **design** a form by adding form fields to the design canvas.



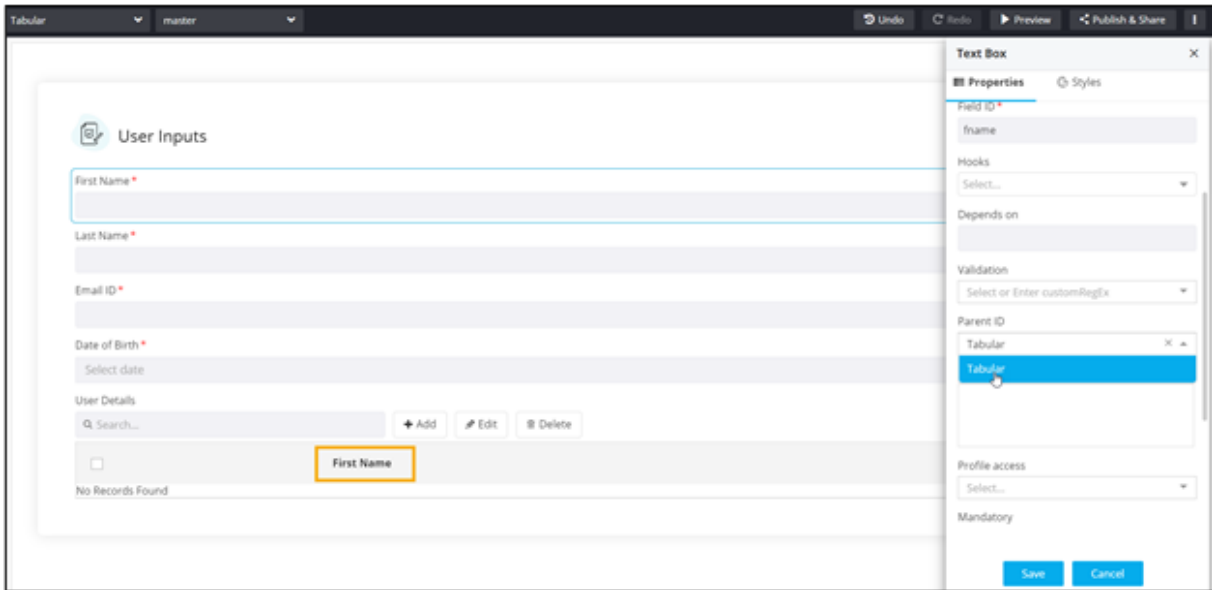
2. Drag and drop the **Tabular** field in the form.



3. Hover your mouse over a field, for example First Name, and click .

The **Text Box** pop-up window opens with the **Properties** tab open by default.
4. In the **Text Box** pop-up window, under **Properties**, select the **Parent ID** as Tabular.

The field, First Name, is added to the Tabular.



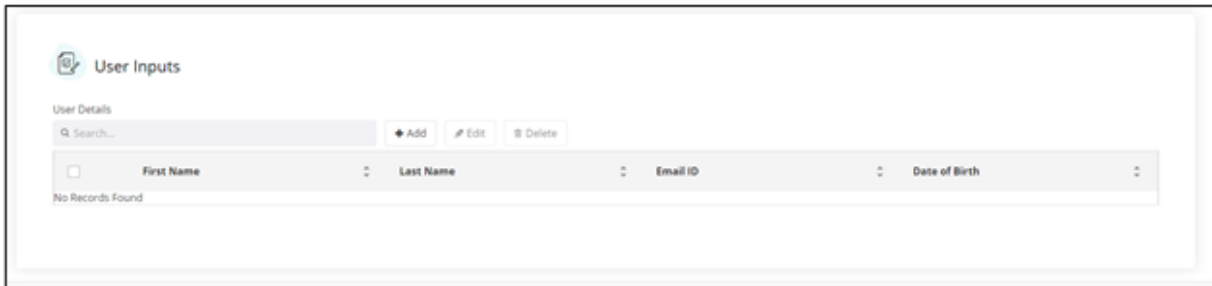
5. Associate the Tabular's field ID as the **Parent ID** for other fields that are to be added to the form.



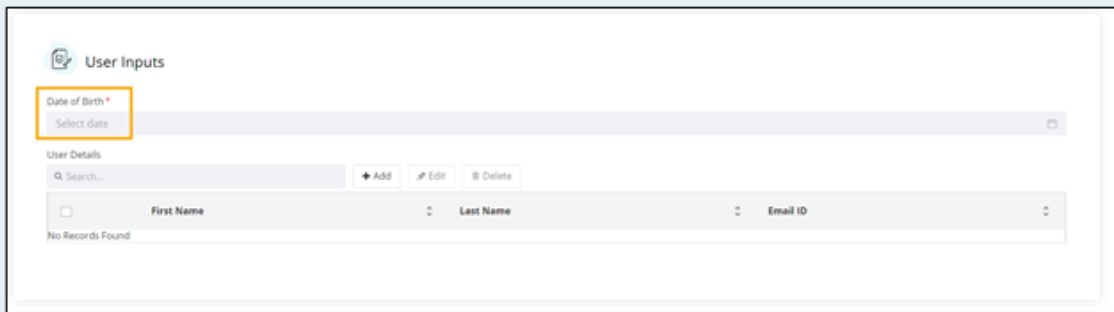
Note: When the Tabular field within a Form Group only the form fields present within that group can be added to that group's Tabular.

6. Click **Preview**.

The Tabular opens in a new tab.

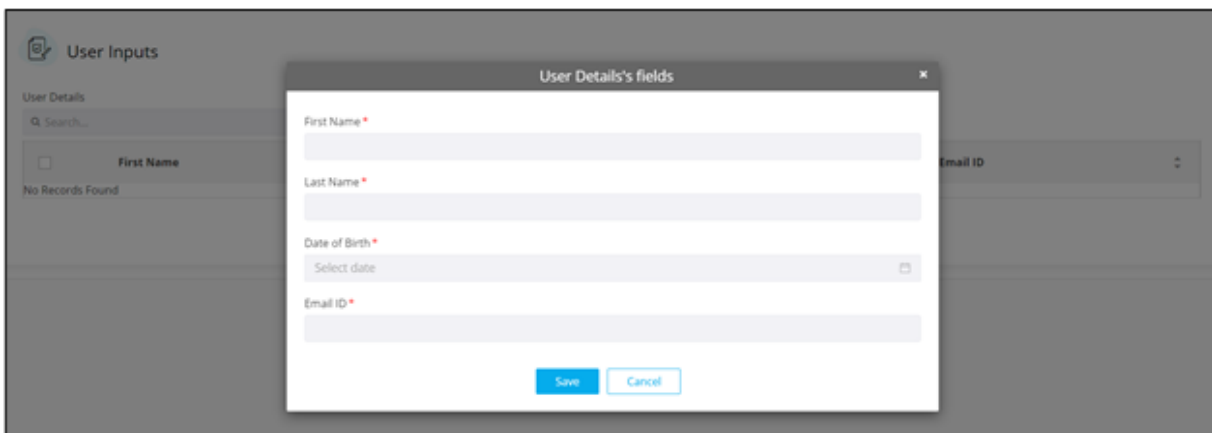


Note: Any form fields not associated with the Tabular field will be displayed outside the Tabular.



7. To add data in the Tabular component, click Add.

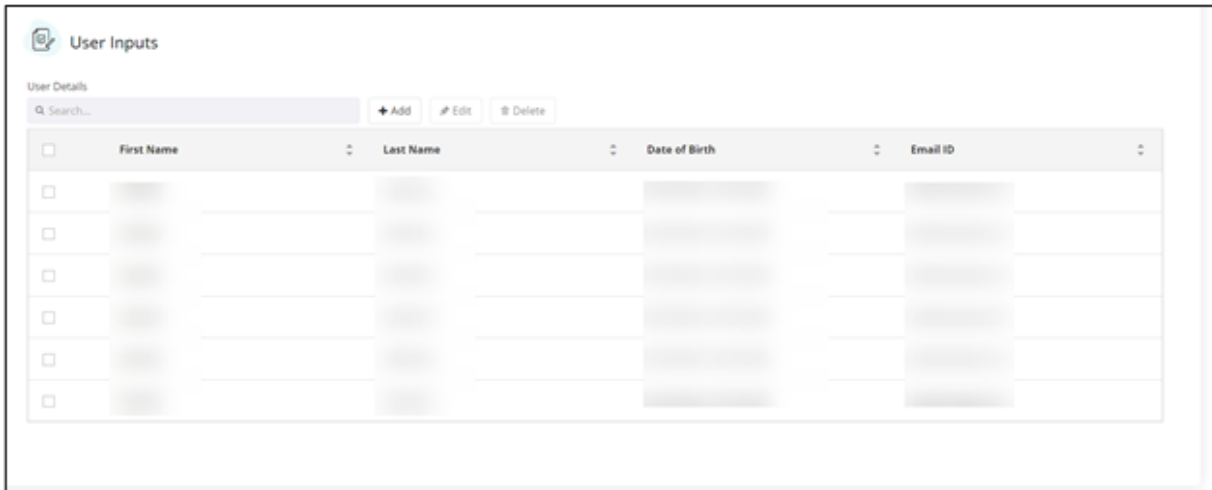
The **User Details's fields** window opens with the fields of the tabular displayed.




8. In the **User Details's fields** window, enter the values for the form fields.


9. Click **Save**.

The values are added to the Tabular.

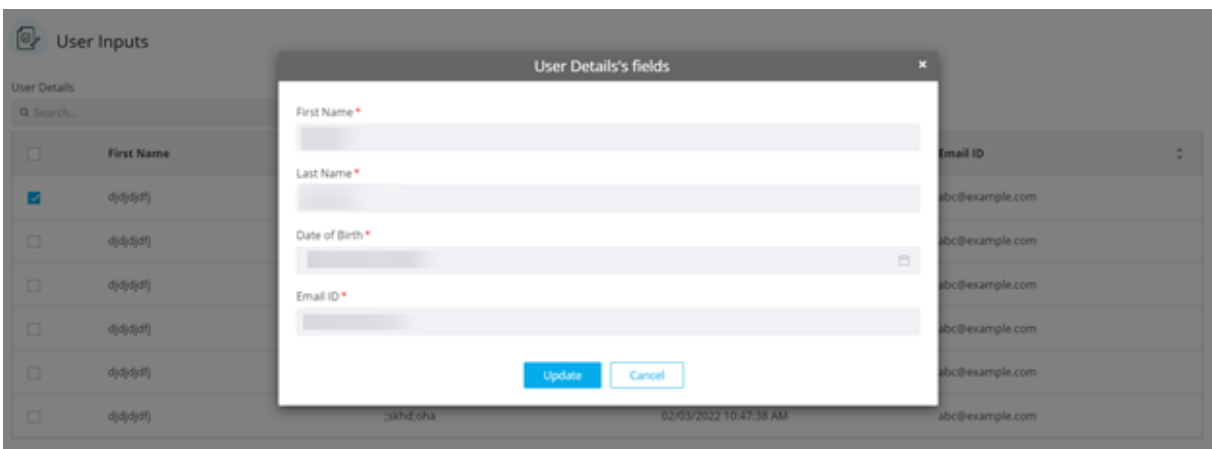


 **Note:** The **User Details's fields** window remains open for the user to add more fields.

10. To close the **Tabular's fields** window, click **Cancel**.
11. To edit a row in the Tabular, select the row to be edited.
The **Edit** button is enabled.
12. Click **Edit**.

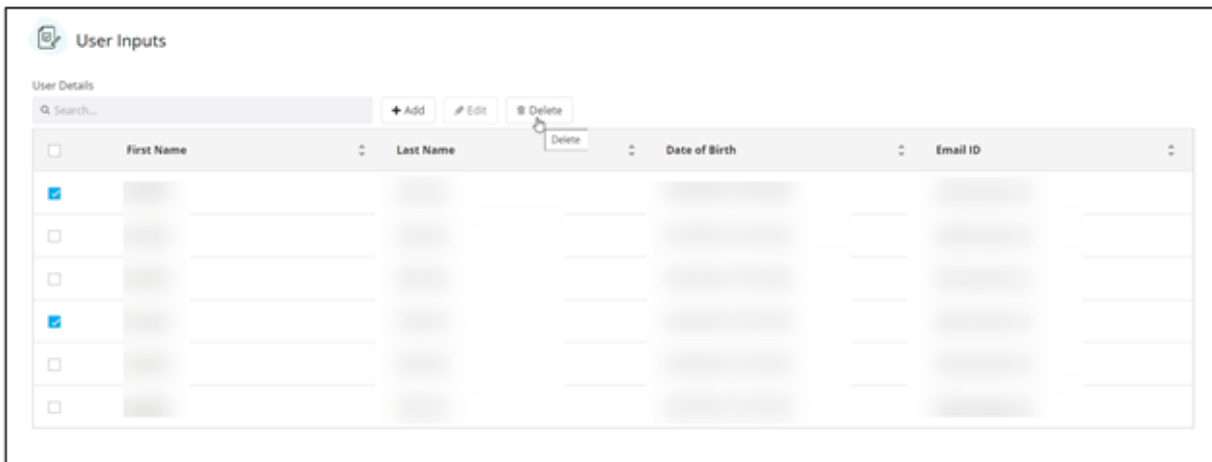
 **Note:** The **Edit** button is enabled only when you select exactly one row in the tabular. Selecting zero or more than 1 row will disable the **Edit** button.

13. In the **User Details's fields** window, modify the form field(s).
14. Click **Update**.



The Tabular's fields window closes.


15. To delete a row in the Tabular, select the row to be deleted.

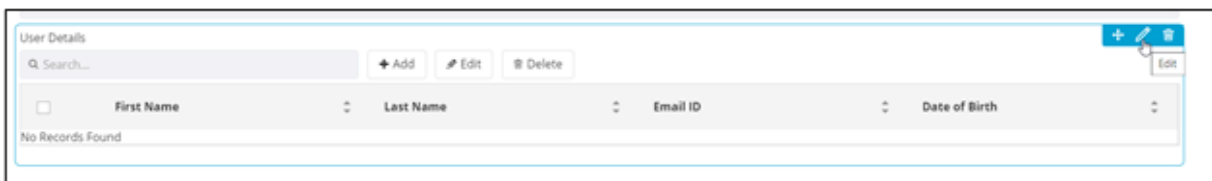
16. Click **Delete**.

Note: The **Delete** button is enabled only when you select a single or multiple rows.

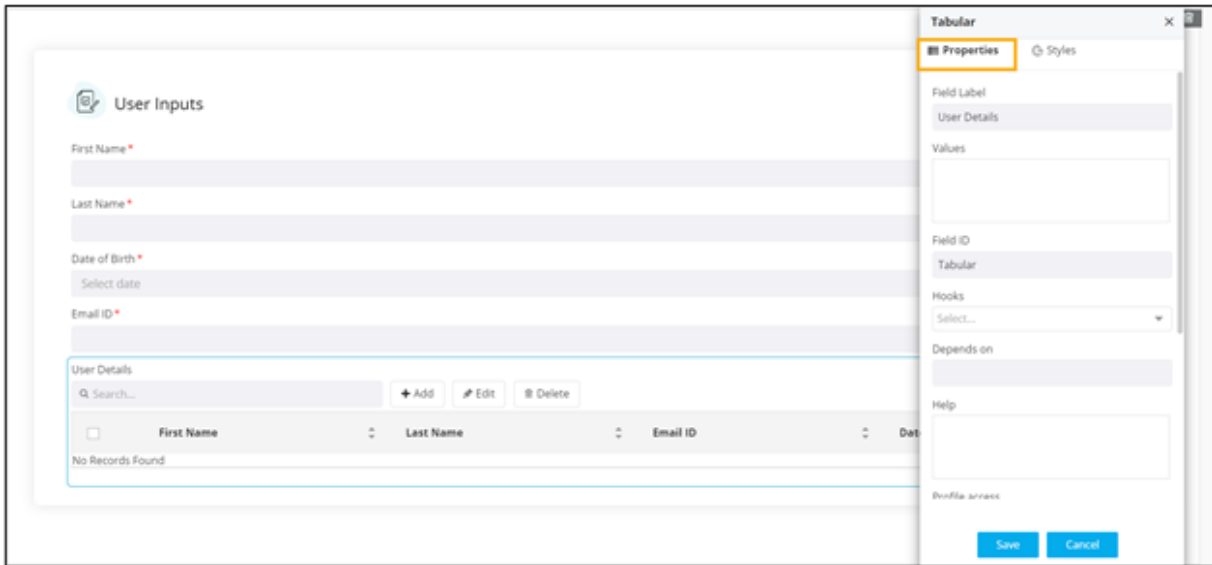
- [Configuring the Tabular - Properties](#)
- [Tabular - Grid Universal Controls](#)
- [Configuring the Tabular with Hooks](#)
- [Configuring the Tabular - Styles](#)

Configuring the Tabular - Properties

1. To configure the **Tabular**, hover your mouse over the field and click .





The **Tabular** pop-up window opens.



2. In the **Tabular** window, under **Properties**, enter or select the required fields.

The following table describes the fields under the **Properties** tab:

Field	Description
Label name*	Enter a valid Label name for the form field. For example, Select Date and Time.
Values	Allows you to define field Values relevant to a form field. <ul style="list-style-type: none"> • Values can be delimited by a comma. • Characters not allowed: '&' and ' '
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> • Allowed characters: '-' and '_' • Character Length: Min (1), Max (50)
Hooks	Allows you to assign an appropriate hook for this field. For example, a hook to fetch the current date. <ul style="list-style-type: none"> • Select a hook that is relevant to the form field. • Hooks can be either Script or REST API. • Hooks are used to fetch details against a specific form field from the device and/or database and map them to the respective field on the user interface. <div style="border: 1px solid #00aaff; border-radius: 10px; padding: 10px; margin-top: 10px;"> <p> Note: For more information on Assigning Hooks to Form Fields, click here.</p> </div>

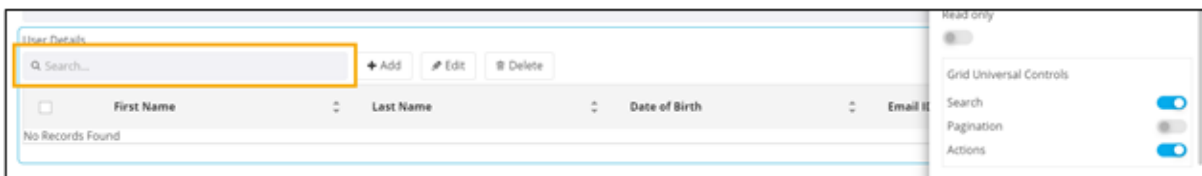
Field	Description
Depends on	<p>Allows you to define dependencies between form fields based on 'Field ID' and 'Values'.</p> <ul style="list-style-type: none"> • Operators used: '&' and ' ' • Max character: 550 • Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Help	Allows you to add Help text/tooltip for the field.
Profile Access	Allows you to select the profile from the dropdown to restrict form field display within a template based on the relevant profile.
Mandatory	Allows you to define this field as Mandatory or otherwise. If marked as mandatory, an asterisk (*) is displayed next to the field name in the form.
Grid Universal Controls	<p>Allows you enable/disable the following features in the Tabular:</p> <ul style="list-style-type: none"> • Search • Pagination • Actions <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 5px; margin-top: 10px;">  Note: For more information con Grid Universal Controls, click here. </div>
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.

Tabular - Grid Universal Controls

This option in the Tabular allows you to enable/disable the following features:

- **Search** - You can turn off the toggle for Search if you don't want the Search bar to be displayed in the Tabular. Enabling the Search bar allows you to search for a particular item in the Tabular quickly.
- Search toggle is on and the search bar is displayed.

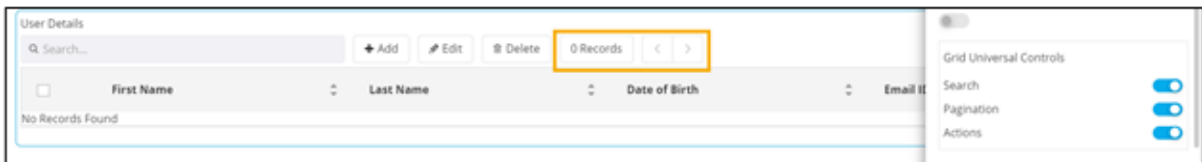


- Search toggle is off and the search bar is not displayed.

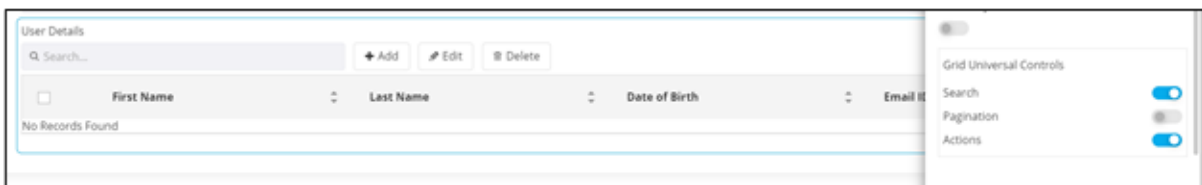


- **Pagination** - You can turn on the toggle for Pagination to display the number of records that can be viewed on a page. Enabling Pagination allows a page with high volumes of data to load faster.

- Pagination toggle is on and the record view is displayed.

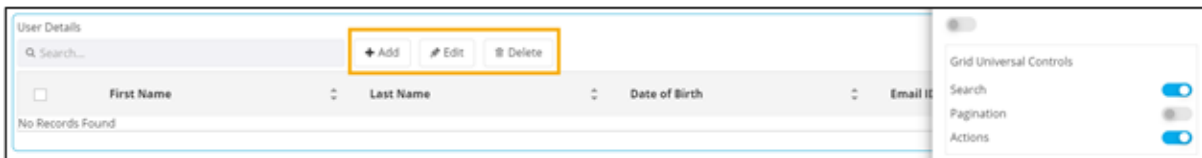


- Pagination toggle is off and the record view is not displayed.

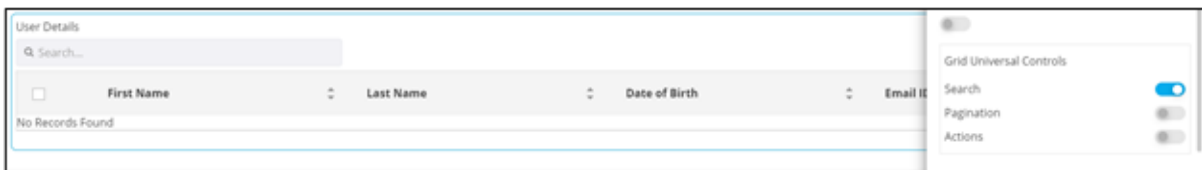


- **Actions** - You can turn off the Actions toggle if you don't want the Action buttons to be displayed in the Tabular. Enabling action buttons such as Add, Edit, and Delete allows you to perform these actions and modify the Tabular quickly.

- Actions toggle is on and the action buttons are displayed.




- Actions toggle is off and the action buttons are not displayed.



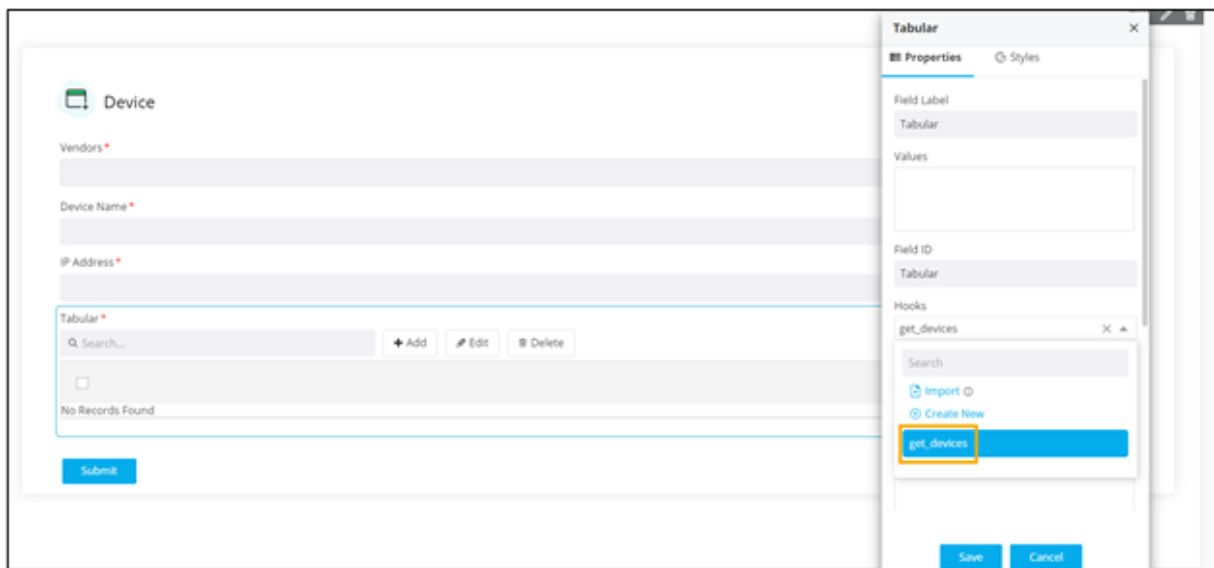
Configuring the Tabular with Hooks

1. [Design](#) a page.
2. From the **Build > Form** section, drag and drop the following form fields to design a form:

Field Type	Label Name	Field Values	Parent ID
Text Box	Vendors	A10,F5,Citrix	
Text Box	Device Name	-	Tabular
Text Box	IP Address	-	Tabular

3. Drag and drop a Tabular field to the form.
4. To configure the **Tabular**, hover your mouse over the field and click .

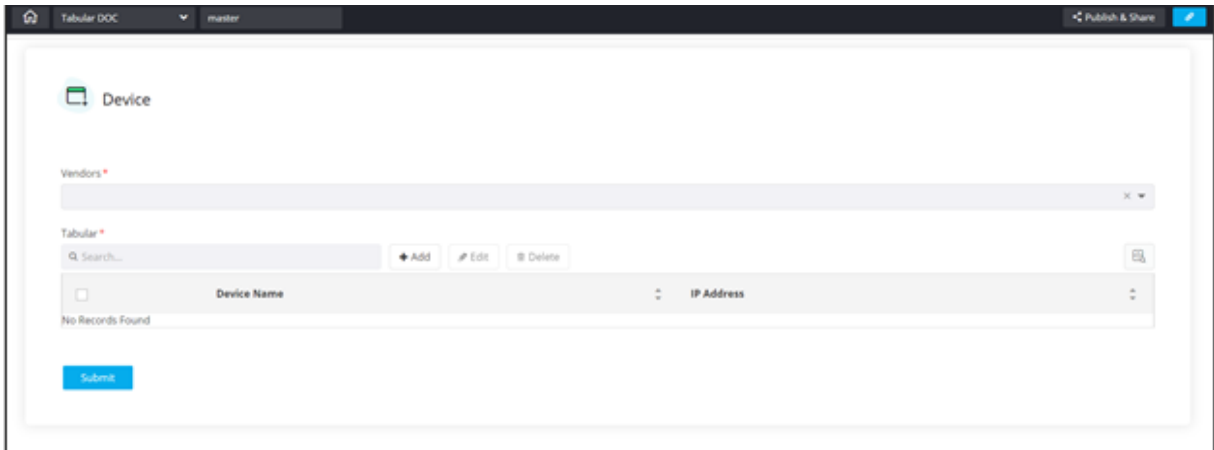
The **Tabular** pop-up window opens with the **Properties** tab open by default.
5. In the **Tabular** window, under **Properties**, select an appropriate hook for getting the device list.



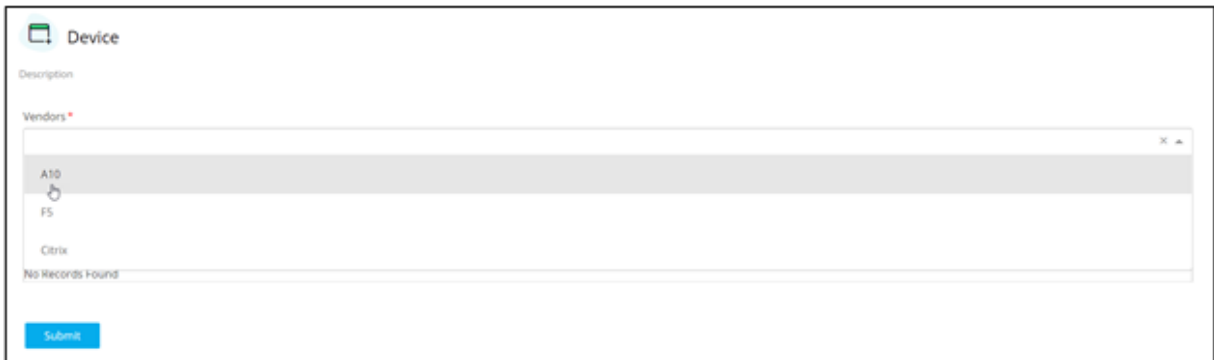
Note: You can also create a hook that meets your requirements. For more information on assigning hooks to form fields, click [here](#).

6. Click **Save**.
7. **Preview** the form.

The form opens in a new tab.

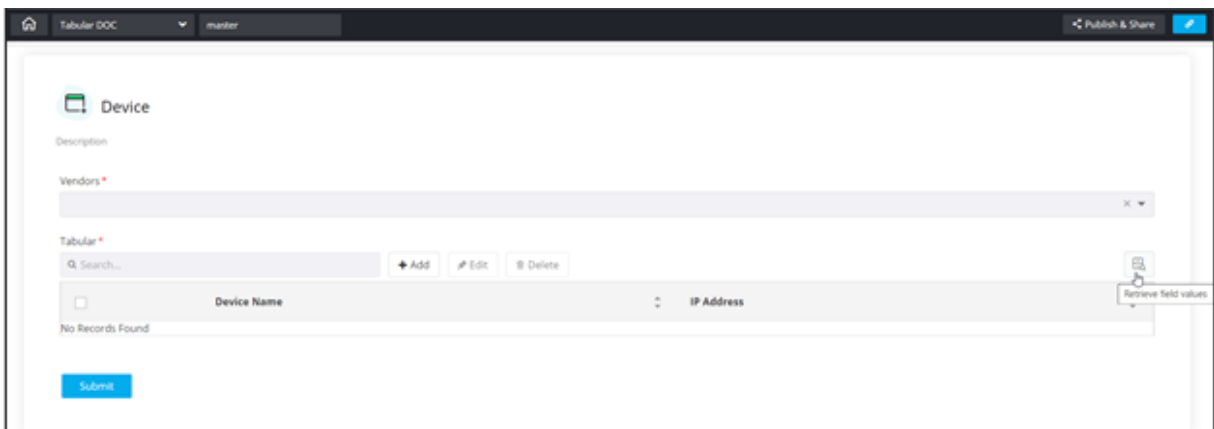


8. In the **Vendors** field, select an option from the dropdown.

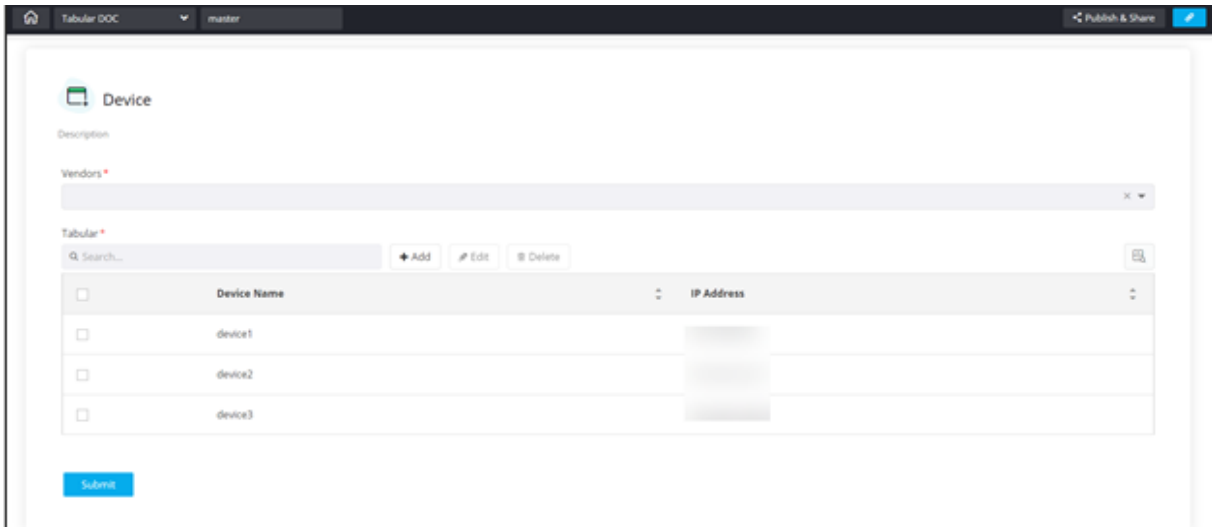


9. To trigger the hook and get the device list based on vendor and auto-populate the form, click

 above the Tabular field.

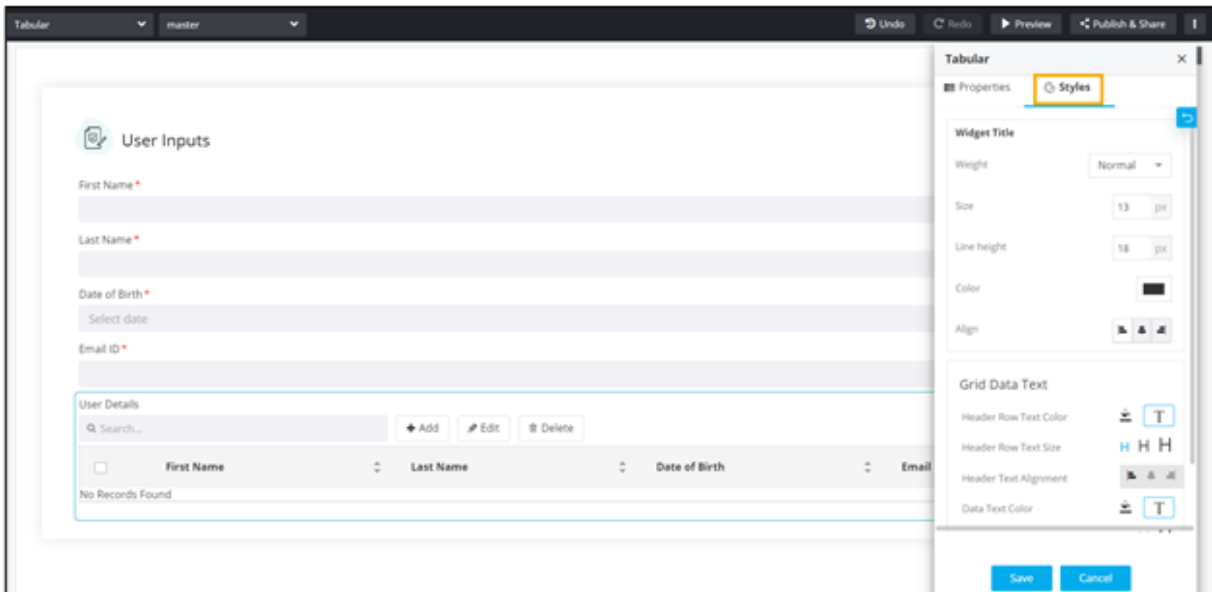


The Tabular is populated with the device list fetched from the hook.



Configuring the Tabular - Styles

1. For more options to customize the Tabular, in the **Tabular** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Field	Description
Weight Title	Allows you to define the following features in the Widget Title:

Field	Description
	<ul style="list-style-type: none"> • Weight - The Weight dropdown list lets you set the font thickness of the field label. • Size - Allows you to increase/decrease font Size of the field name. • Line height - Allows you to increase/decrease the Line height of the field. This means the space between the field and the field border. • Color - Allows you to define the Color of the field label. • Align - Allows you to Align the field label to the left, center or right side of the field.
Grid Data Text	<p>Allows you to define the following features for header text:</p> <ul style="list-style-type: none"> • Header Row Text Color - Allows you to select the color for the text in the Header row from the color picker or the color palette. • Header Row Text Size - Allows you to set the size of the text in the Header row. • Header text Alignment - Allows you to align the text in the Header row to the left, center or right side. • Data Text Color - Allows you to select the color for the data text from the color picker or the color palette. • Data Text Size - Allows you to set the size of the data text in the Tabular. • Data Text Alignment - Allows you to align the data text to the left, center or right side.

2. To save your settings, click **Save**.

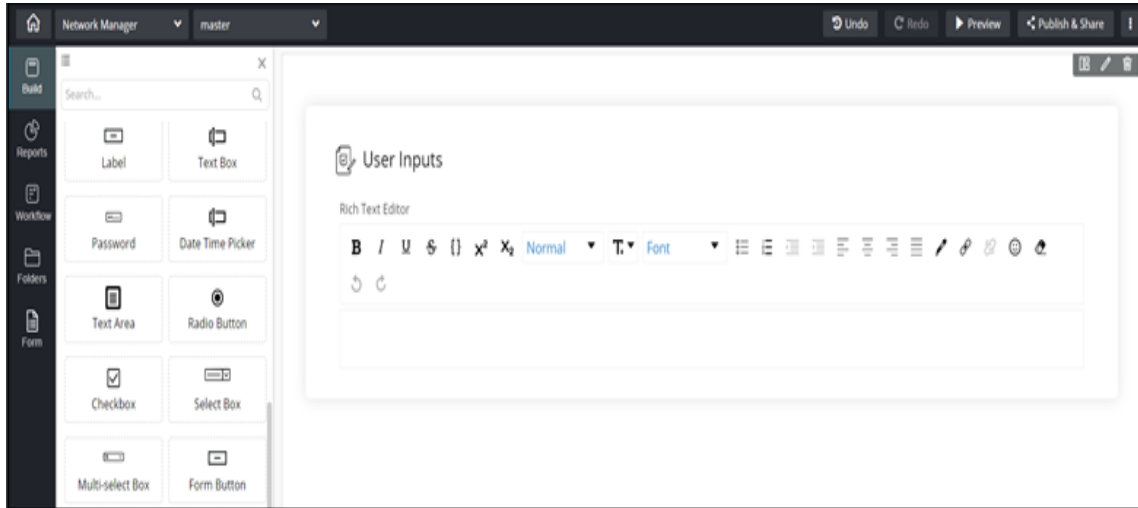
3. To restore the settings under **Styles** to default, click .

Form Field - Rich Text Editor

You can add a Rich Text Editor to the form on your page. This form field allows you to add a text editor to your page with the following features:

- Provision to define the font type and size, add font effects, highlight text in color, and add bulleted and numbered points.
- Provision to enable monospace.
- Provision to insert superscript and subscript.
- Provision to add links to external/internal pages.
- Provision to embed an internal/external page within the text editor.
- Provision to indent and align the text as per requirement.
- Provision to upload files to the page.

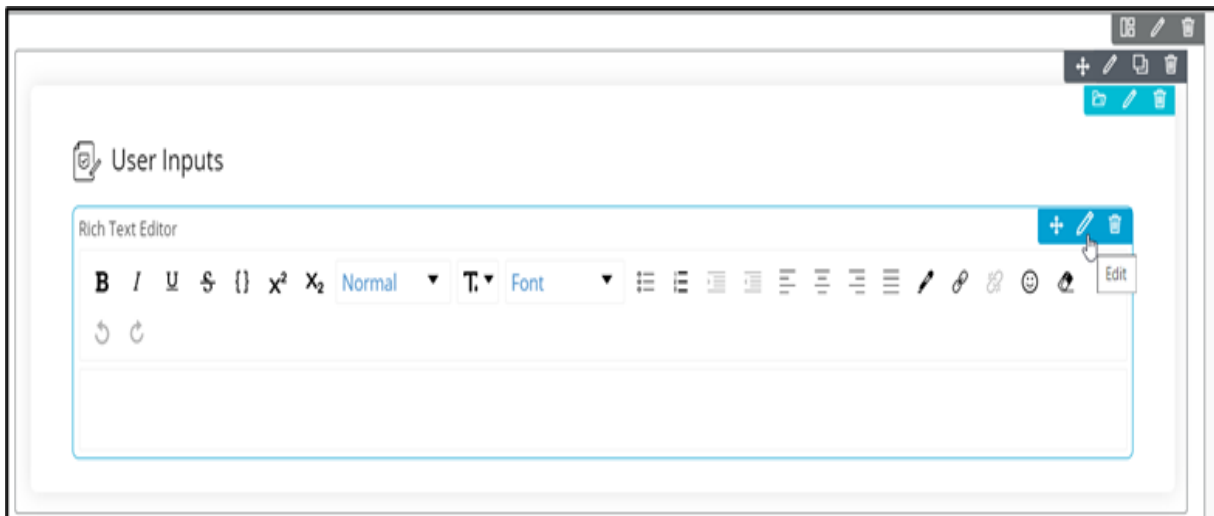
To add the Rich Text Editor field to your form, drag and drop the **Rich Text Editor** component in the build area.



- [Configuring the Rich Text Editor - Properties](#)
- [Configuring the Rich Text Editor - Styles](#)

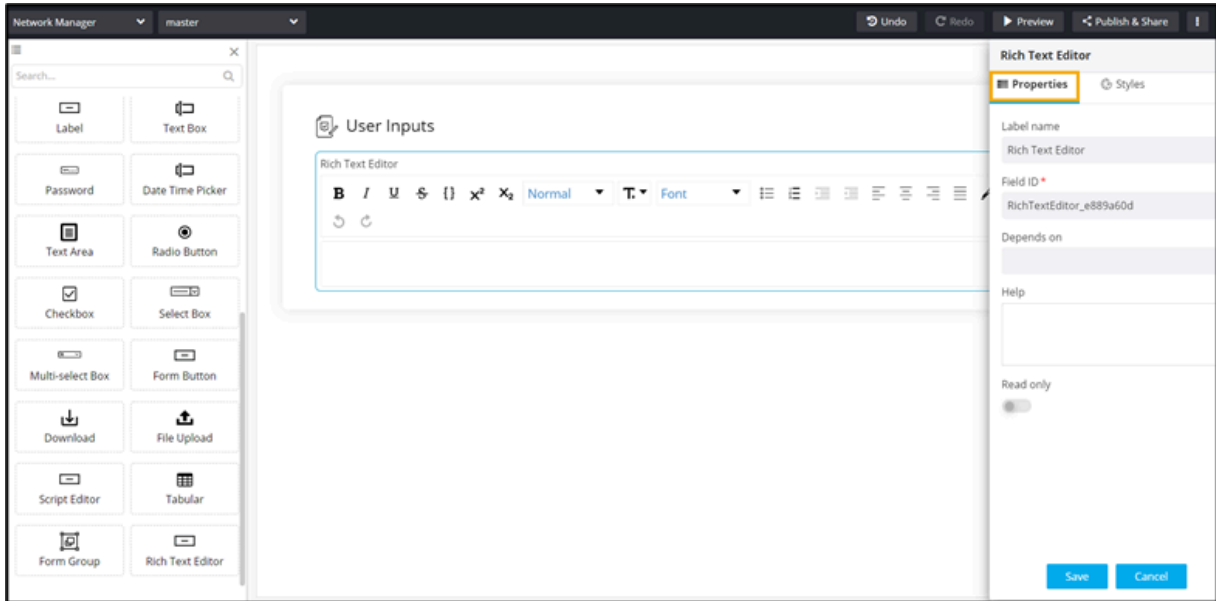
Configuring the Rich Text Editor - Properties

1. To configure the Rich Text Editor, hover your mouse over the top right corner of the widget and click



The **Rich Text Editor** pop-up window opens with the **Properties** tab open by default.

2. In the **Rich Text Editor** window, under **Properties**, enter or select the required field information.



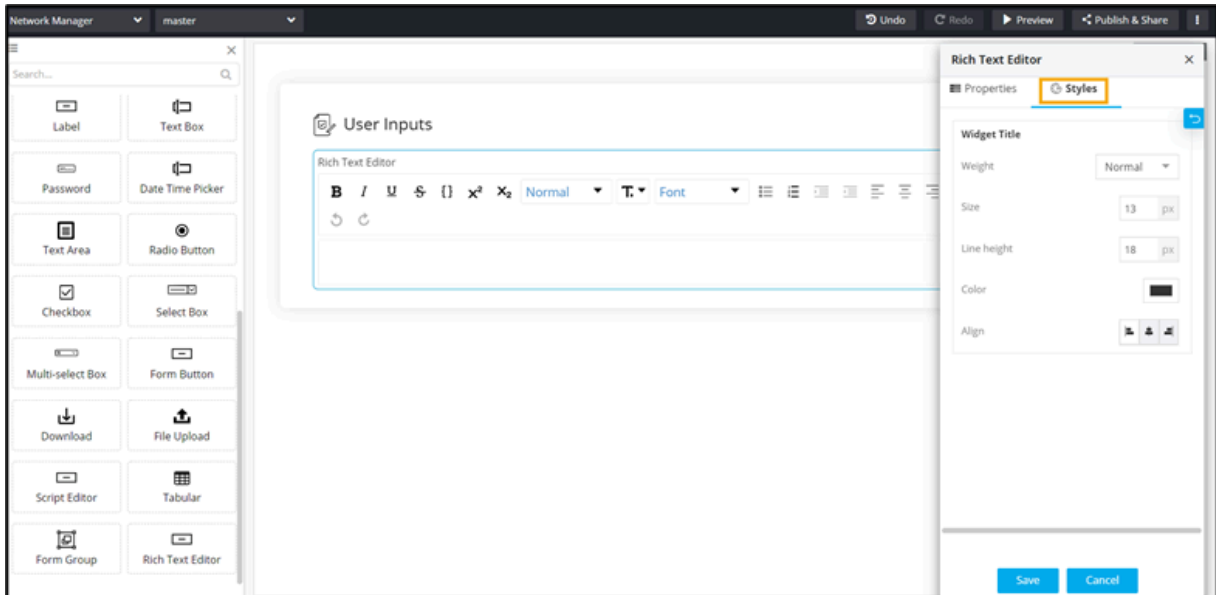
The following table describes the fields under the **Properties** tab:

Field	Description
Label name	Enter a valid Label name for the form field. For example, Select Date and Time.
Field ID*	Allows you to assign a unique Field ID to refer to the field name. <ul style="list-style-type: none"> Allowed characters: '-' and '_' Character Length: Min (1), Max (50)
Depends on	Allows you to define dependencies between form fields based on 'Field ID' and 'Values'. <ul style="list-style-type: none"> Operators used: '&' and ' ' Max character: 550 Format: [Field Id1: value1 & Field Id2: value1 & Field Id3: value3], [Field Id1: value1 Field Id2: value1]
Help	Allows you to add Help text/tooltip for the field.
Read only	Allows you to define this field as Read Only or otherwise. If marked as Read Only, a red crossed circle is displayed when you hover your mouse over the read only field and does not allow you to enter any information.
All Asterisk (*) marked fields are mandatory.	

3. Click **Save**.


Configuring the Rich Text Editor - Styles

1. For more options to customize the Rich Text Editor, in the **Rich Text Editor** window, click **Styles**.



The following table describes the options available under the **Styles** tab:

Option	Description
Weight Title	<p>Allows you to define the following features in the Widget Title:</p> <ul style="list-style-type: none"> • Weight - The Weight dropdown list lets you set the font thickness of the field label. • Size - Allows you to increase/decrease font Size of the field name. • Line height - Allows you to increase/decrease the Line height of the field. This means the space between the field and the field border. • Color - Allows you to define the Color of the field label. • Align - Allows you to Align the field label to the left, center or right side of the field.

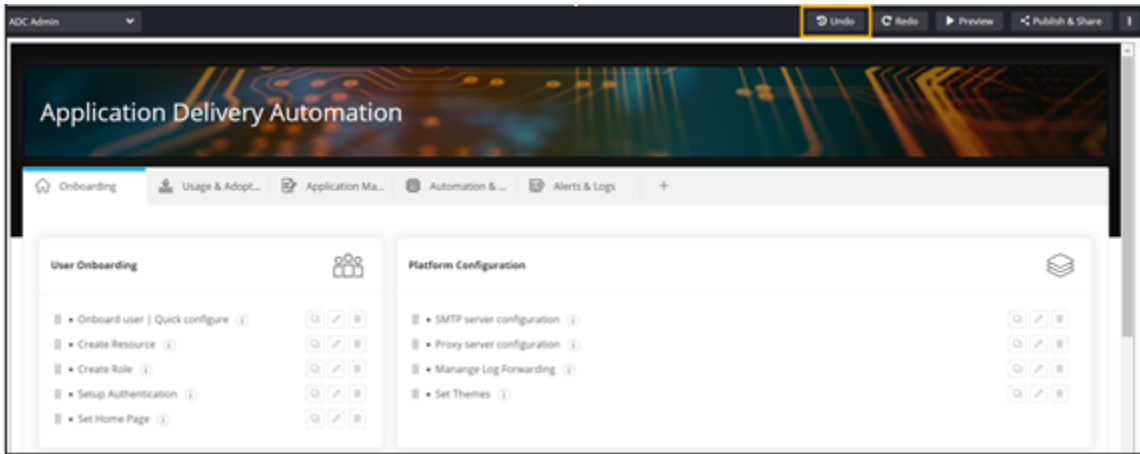
2. To save your settings, click **Save**.
3. To restore the settings under **Style** to default, click 

How to Undo/Redo actions

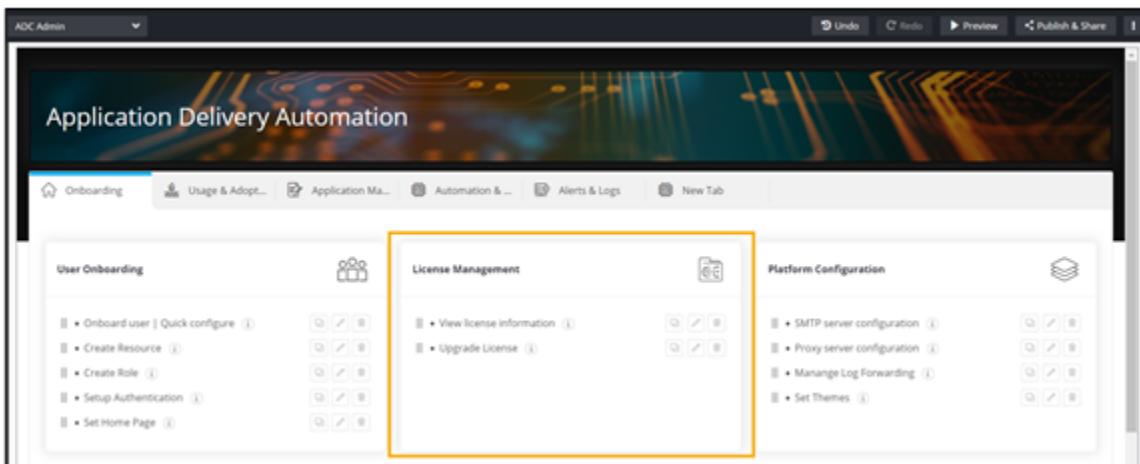
Users can undo/redo any changes made on their page. If a user has accidentally deleted a widget, they can undo the delete action.

To undo an action:

1. Open a page in design mode.
2. Click **Undo**.

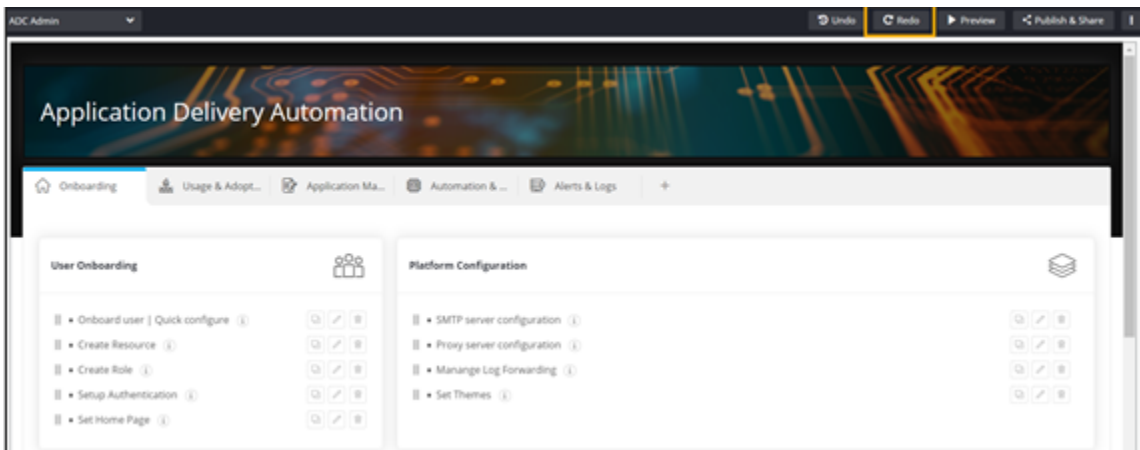


The deleted widget is displayed.



3. To redo the delete action, click **Redo**.


The widget is deleted again.

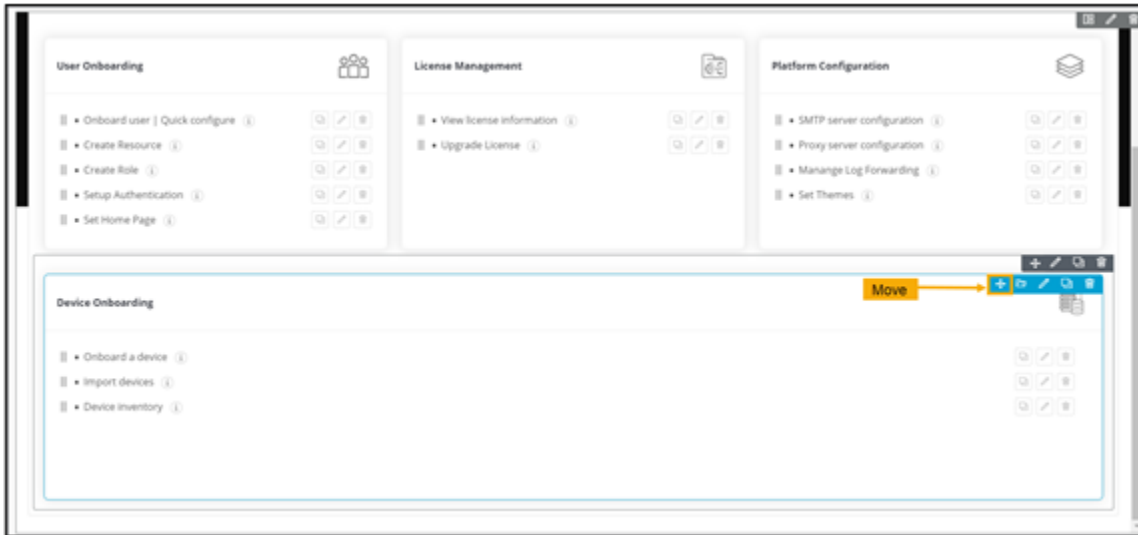


Moving widgets

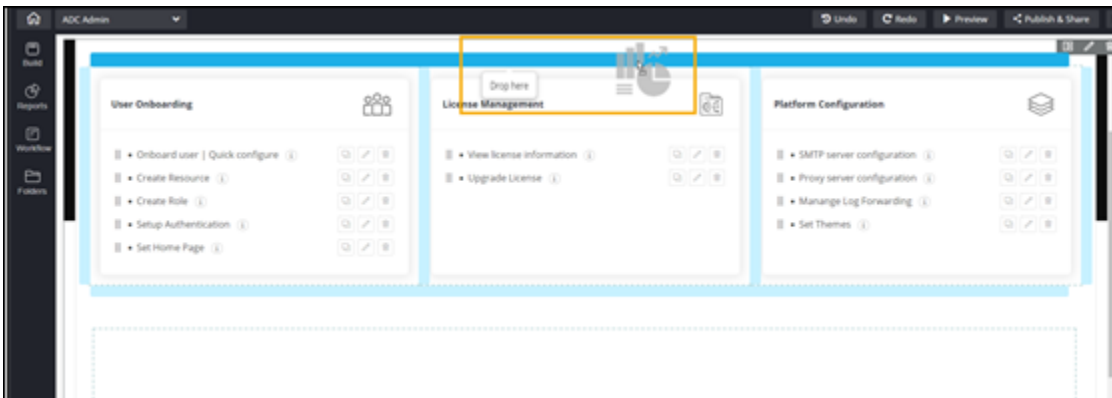
You can modify the placement of the widgets on your page and move it around as per your preference.

To move a widget:

1. Hover your mouse over the widget and click .




2. Move the widget to any blue highlighted space in the build area.

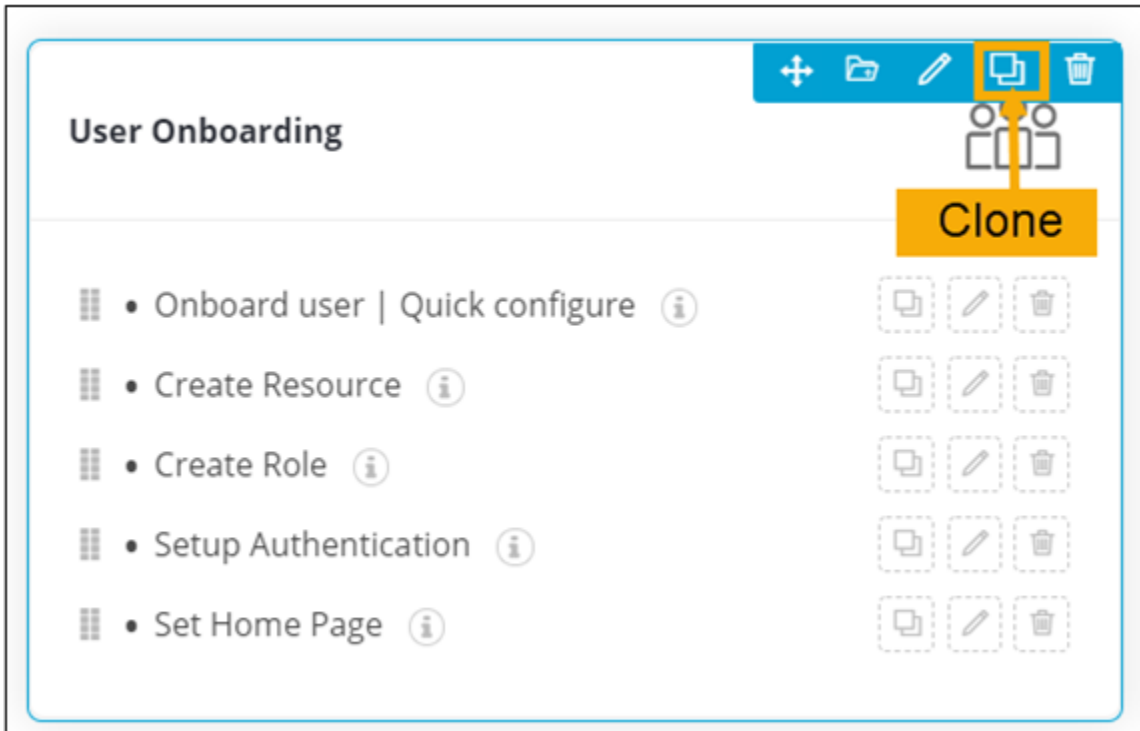


Cloning Widgets

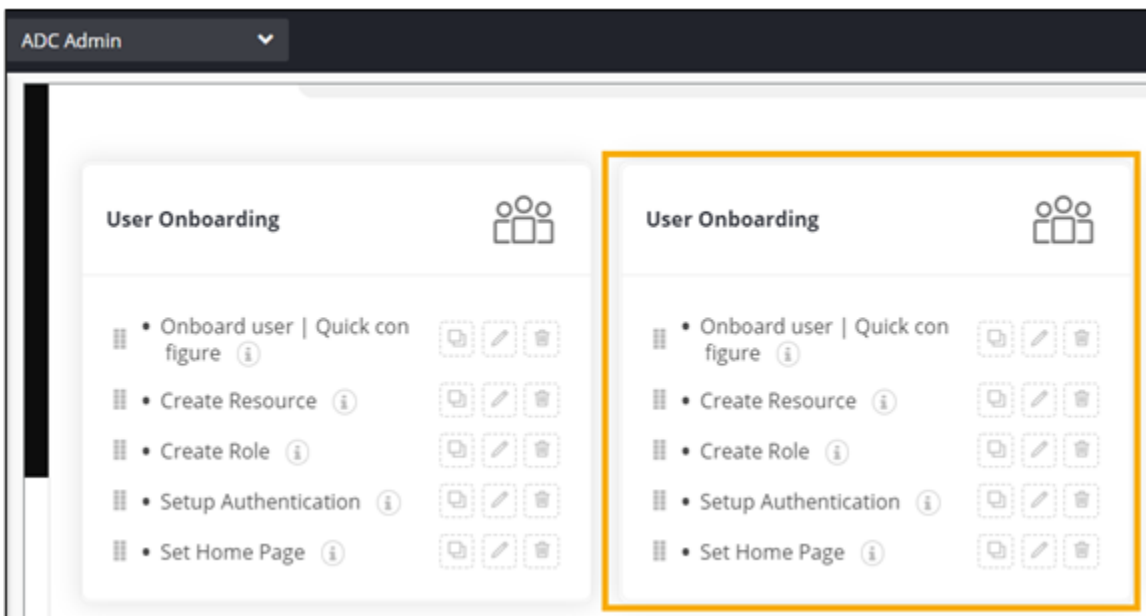
You can clone a widget to have multiple widgets of the same component on their page, without having to drag and drop the components onto the page every time.

To clone a widget:

1. Hover your mouse over the widget.
2. Click .



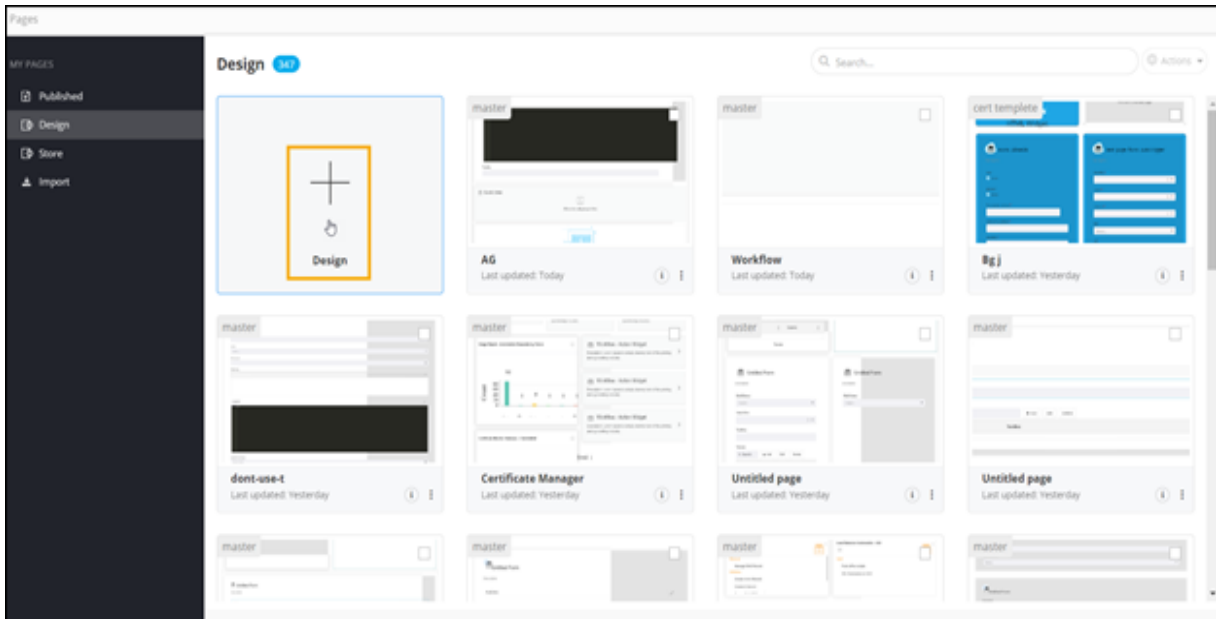
A clone of the selected widget is displayed on the page. You can modify this cloned widget as per your requirement.



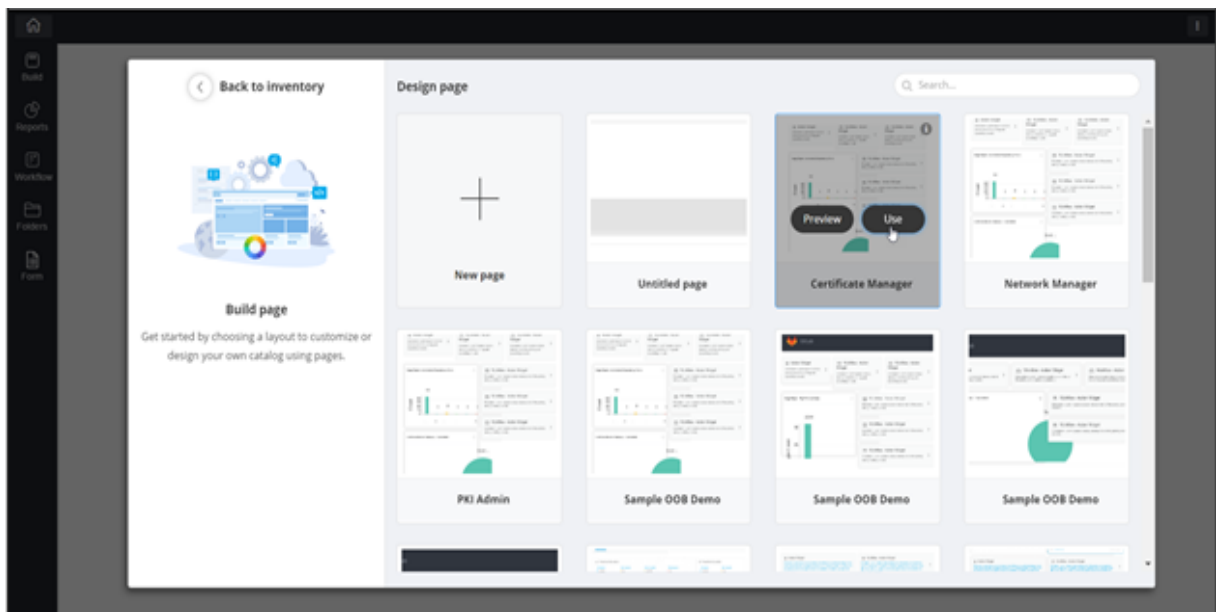
Chapter 10: Customizing Prebuilt Pages

Self-service Pages module also allows you to preview out of the box (OOB) pages and modify them according to their specific requirements.

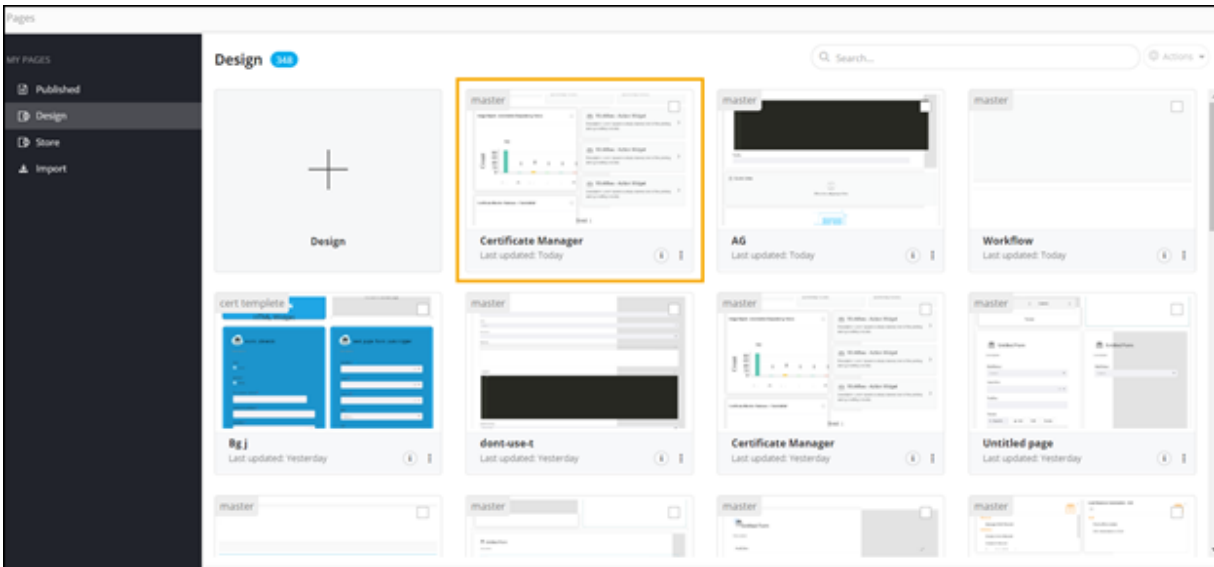
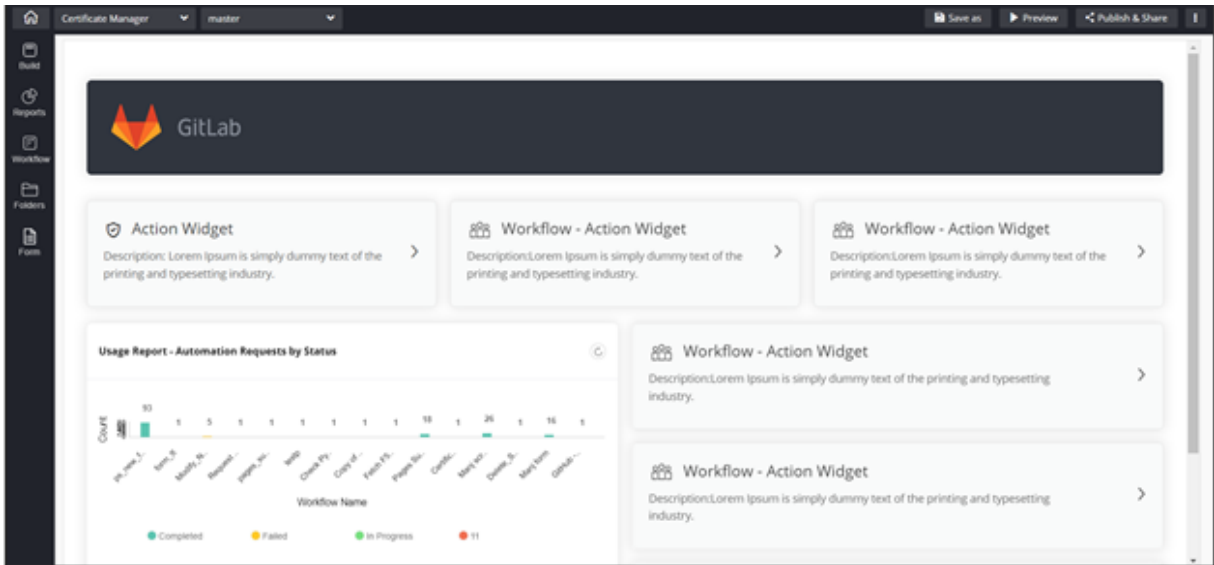
1. On the **Pages** Inventory page, from the navigation pane on the left, click **Design**.
2. On the **Design** Inventory page, click **Design**.




3. To customize an existing page, hover your mouse over a prebuilt page and click **Use**.



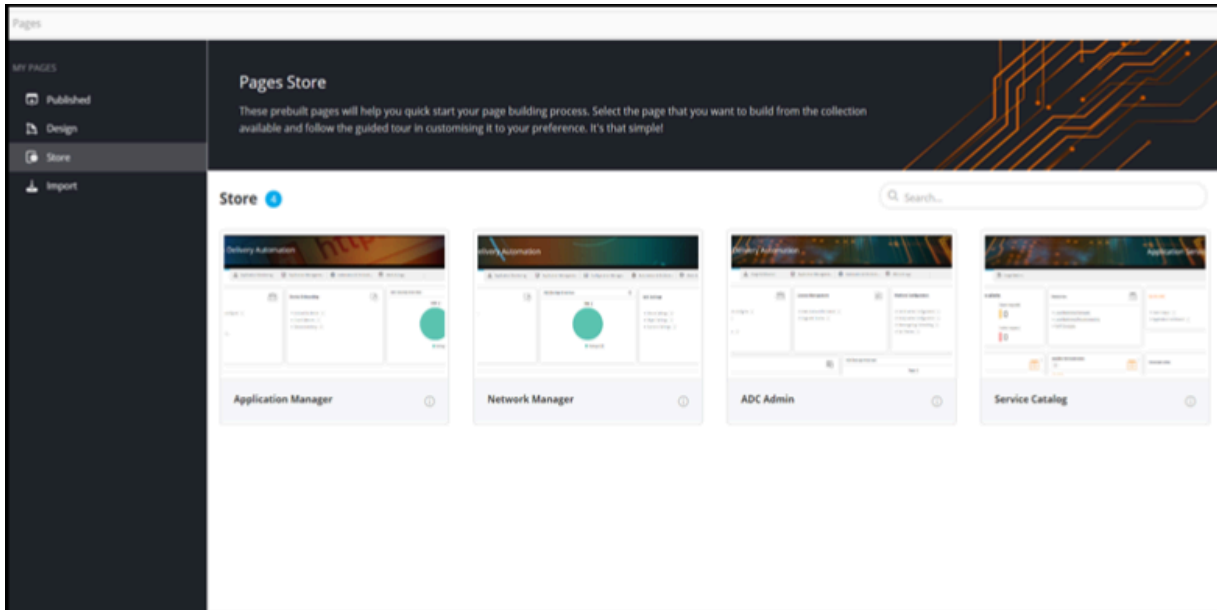
A copy of the selected page opens on your screen and is added to the **Design** inventory.



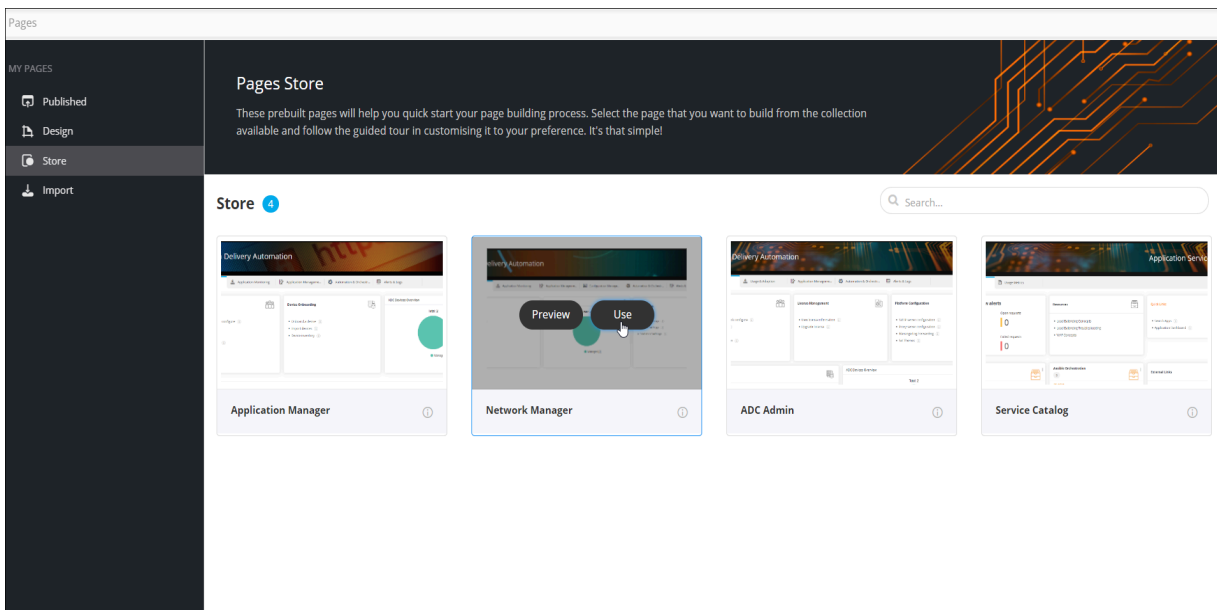
 **Note:** For steps on designing pages, click [here](#).

Chapter 11: Modifying Prebuilt Pages from the Store

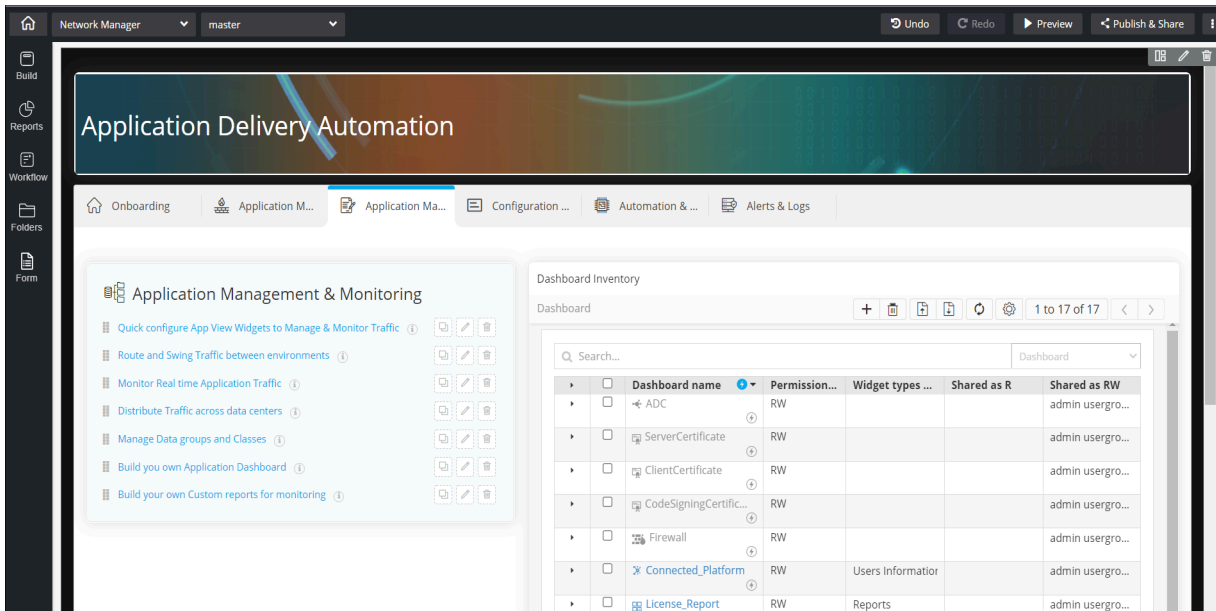
1. On the **Pages** Inventory page, from the navigation pane on the left, click **Store**.



2. Hover your mouse over the page that is to be modified and click **Use**.



The selected page opens on your screen and a copy of the page is added to the **Design** inventory.



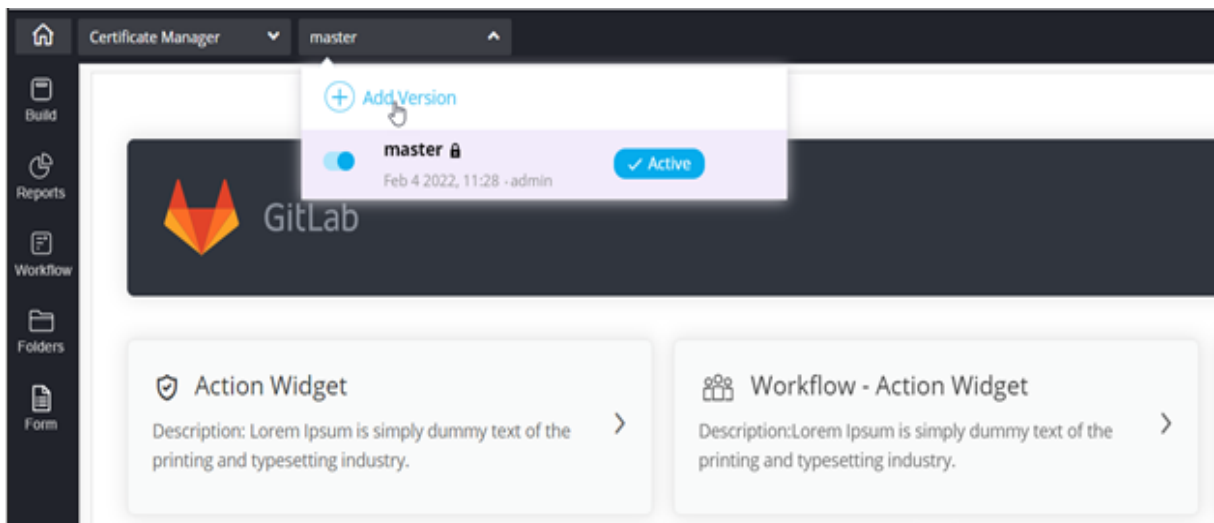
Chapter 12: Version Control

This feature allows you to design and have multiple versions of a page and enable one master version.

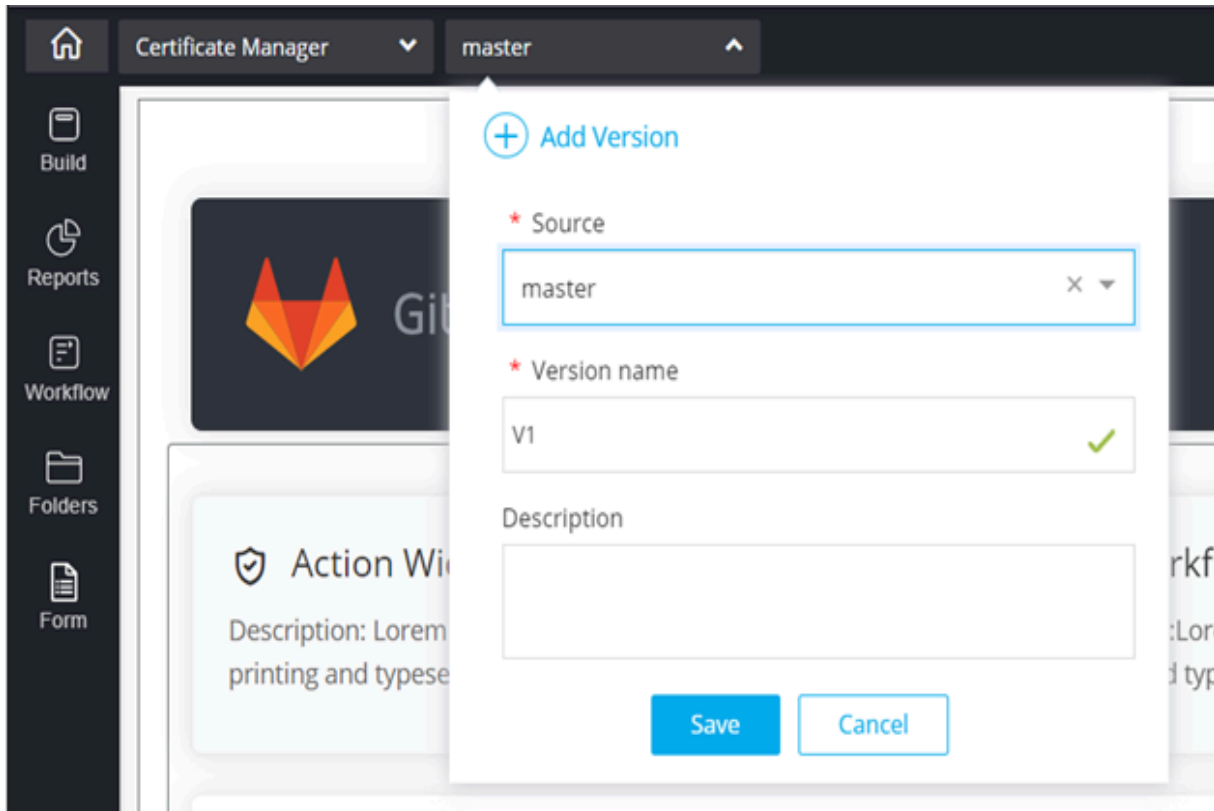
- Provision to version control the pages.
- Provision to edit/configure page elements in each version.
- Version control allows for tracking up to ten versions of the page.
- Provision to edit and delete versions.
- Provision to preview another version in a new tab/window while working on the current version.

To add a new version:

1. From the **master** dropdown menu, select **Add Version**.

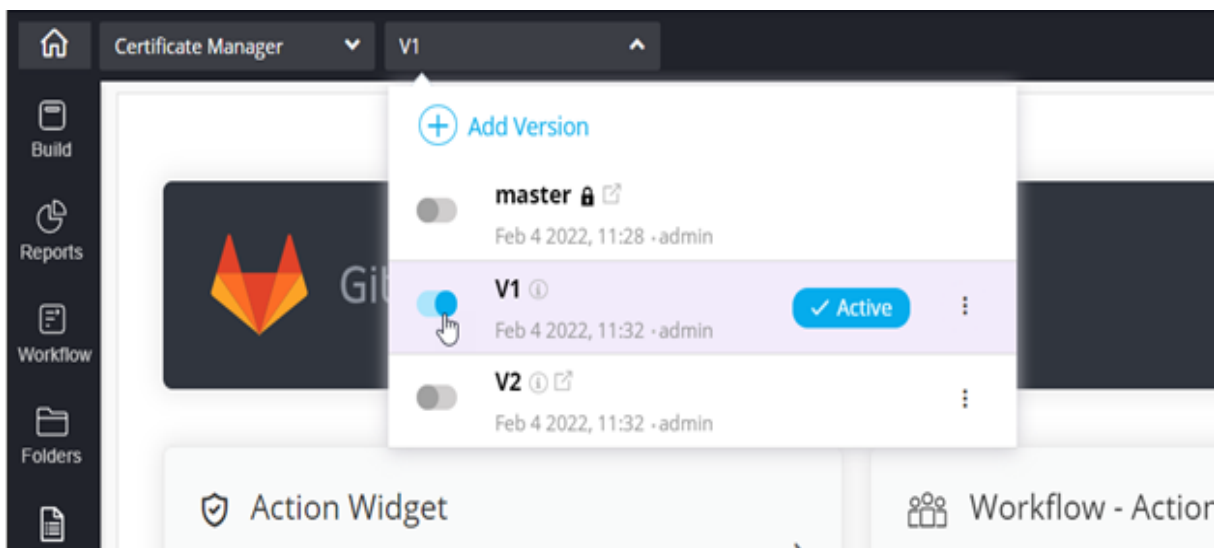


2. Select the **Source** and enter a **Version name**.



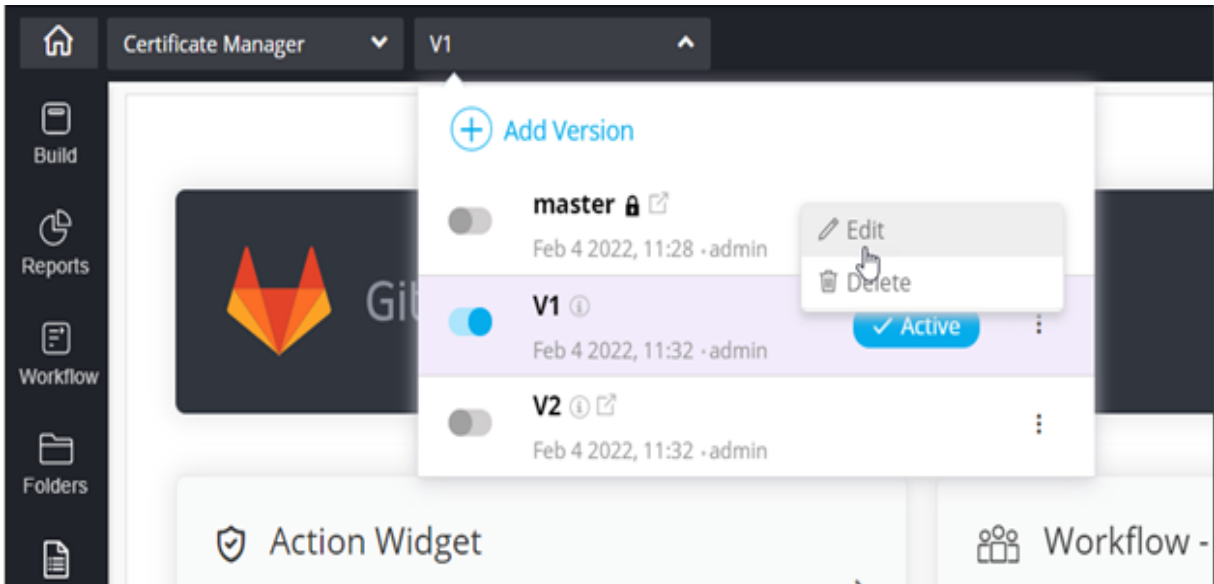
3. Click **Save**.

4. To mark a particular version as the active version for the Page, enable the toggle next to it.

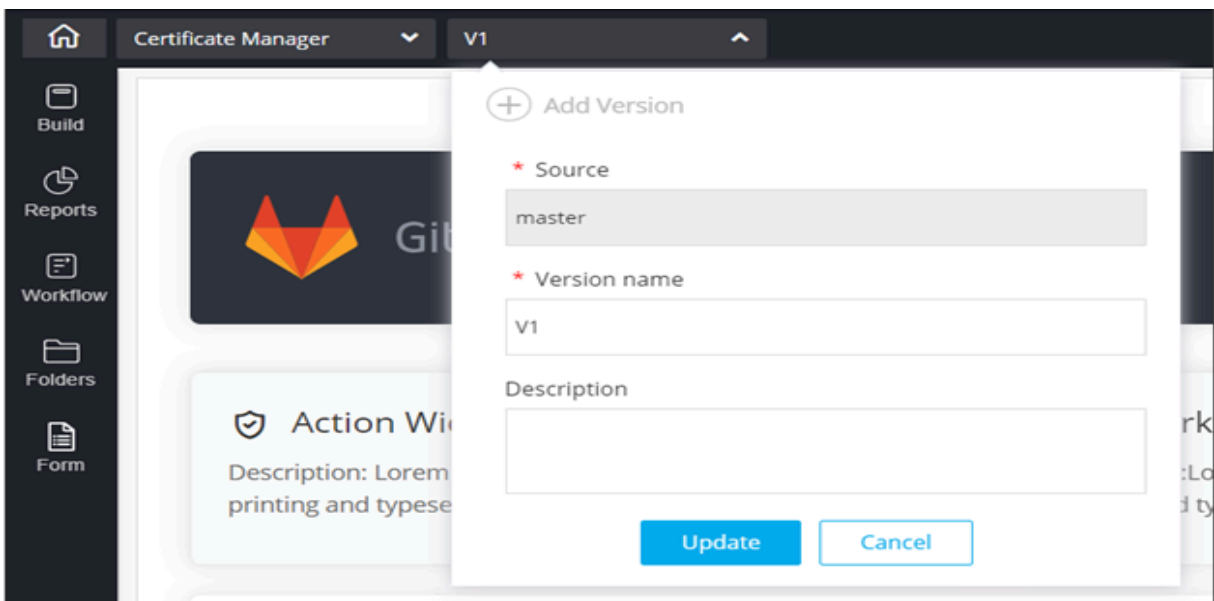


5. For more options, click .


6. To edit the version details, from the options displayed, click **Edit**.



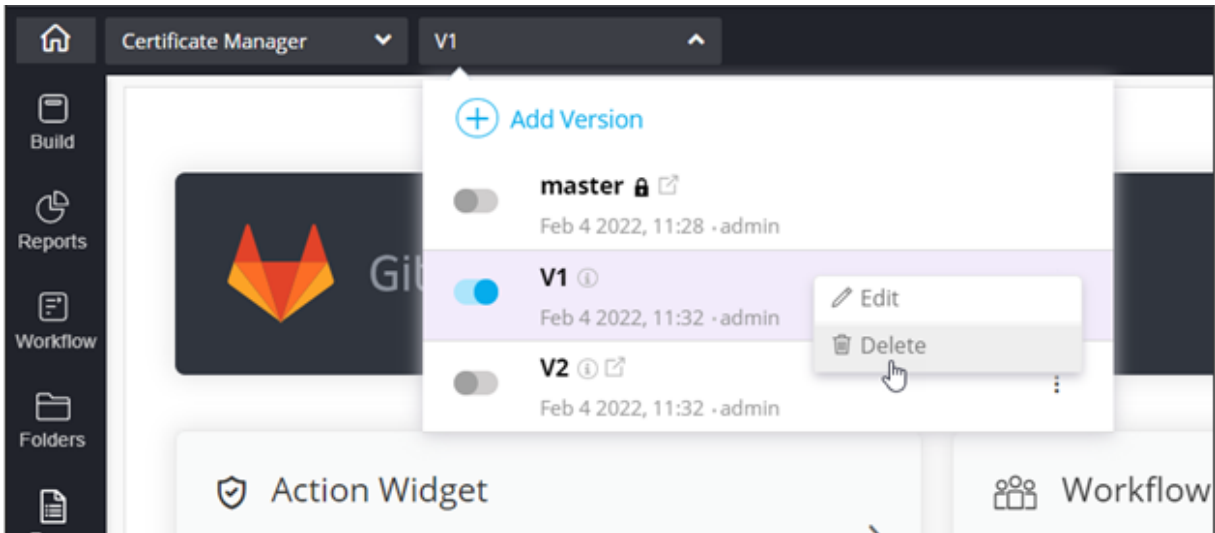
7. Edit the version details and click **Update**.



! **Important:** The master version cannot be edited.

8. To delete the version, click .

9. From the options displayed, click **Delete**.



Important: The master version or any active version cannot be deleted.

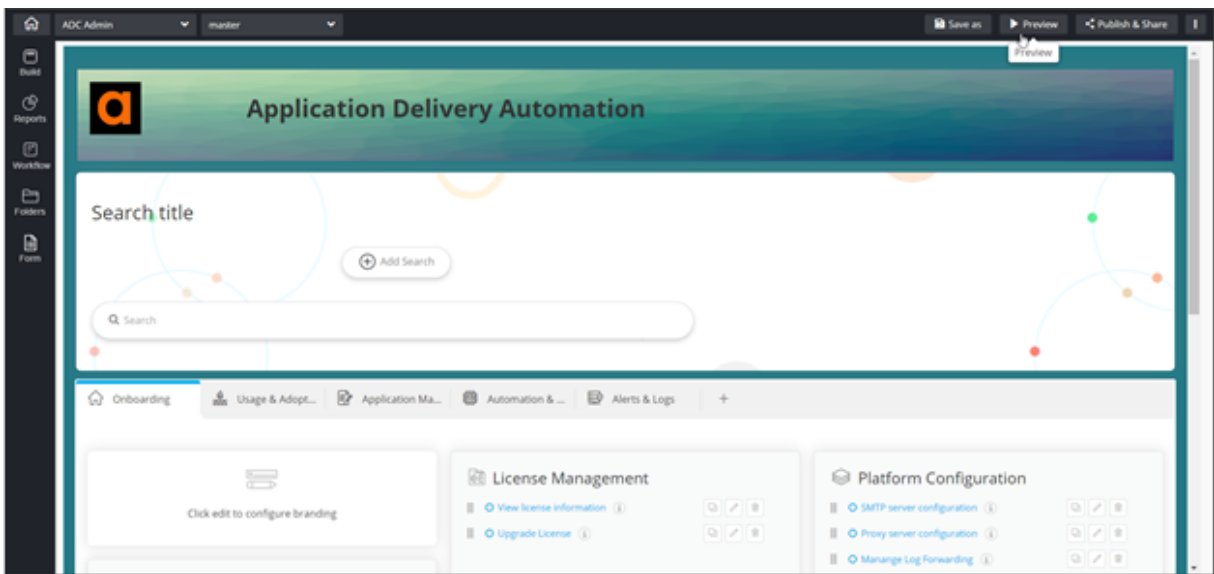
Chapter 13: Preview a Page

Self-service Pages module allows you to see a preview of your custom page before publishing it. Also, certain functionalities such as modifications in the workflow components are only available in the preview mode.

To preview a page:

1. Open a page from the [Design](#) inventory.
2. From the top right corner of the screen, click **Preview**.

A preview of the page opens in a new tab on your screen.

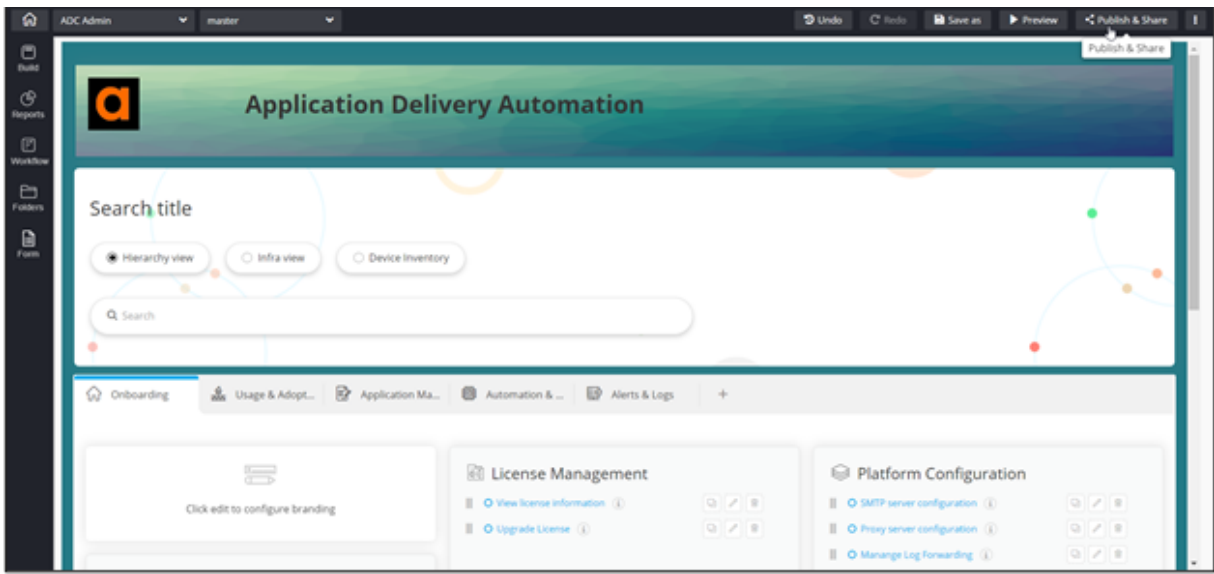


Chapter 14: Publishing a Page

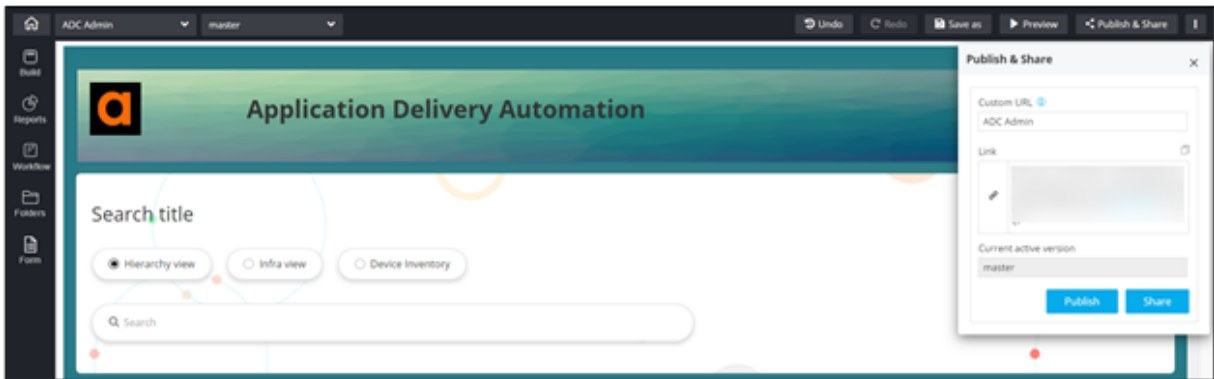
You can publish a page once all the desired components have been added to the page.

To publish a page:


1. From the top right corner of the page, click **Publish & Share**.





The **Publish & Share** pop-up window opens.



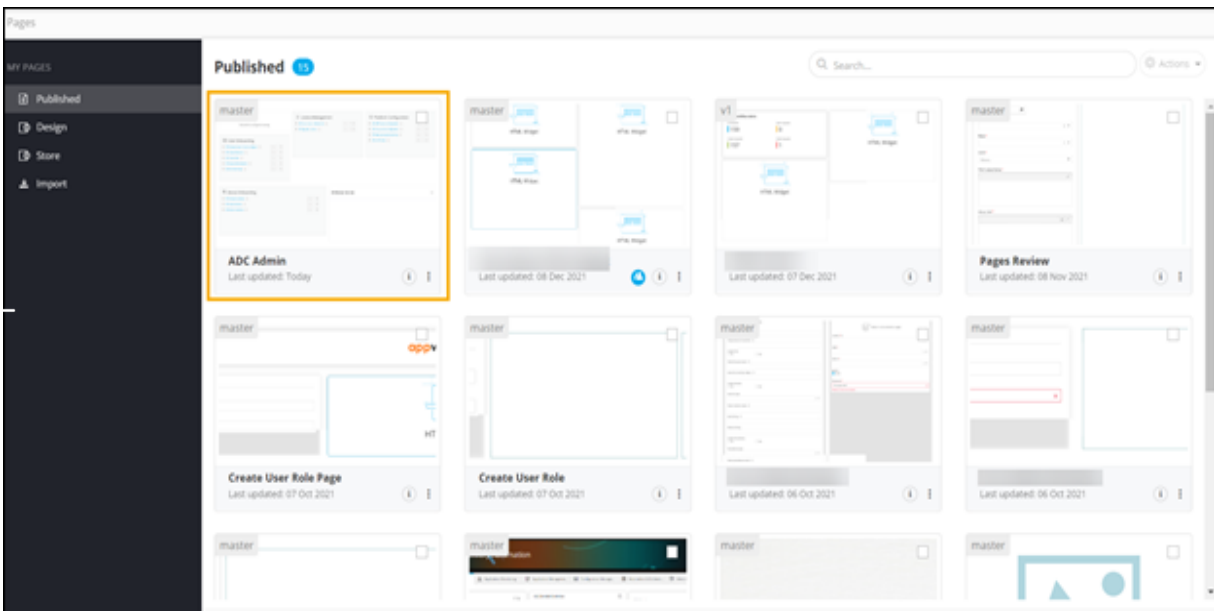
The following table describes the options available in the Publish & Share window:


Option	Description
Custom URL	Allows you to enter a Custom URL for the page.  Note: Page name is set as the default URL.

Option	Description
Link	Displays the link for the page. Click on the link to open your page in a new tab. To copy the link click  .
Current active version	Displays the current active version of the page. <div style="border: 1px solid #00a0e3; border-radius: 10px; padding: 10px; margin-top: 10px;"> Note: This is a read-only field.</div>

2. To publish your page, in the **Publish & Share** window, click **Publish**.

The Published page is added to the **Published** Inventory.



 **Important:** Only the current active version of the page will be published and added to the **Published** inventory.

Chapter 15: Sharing a Page

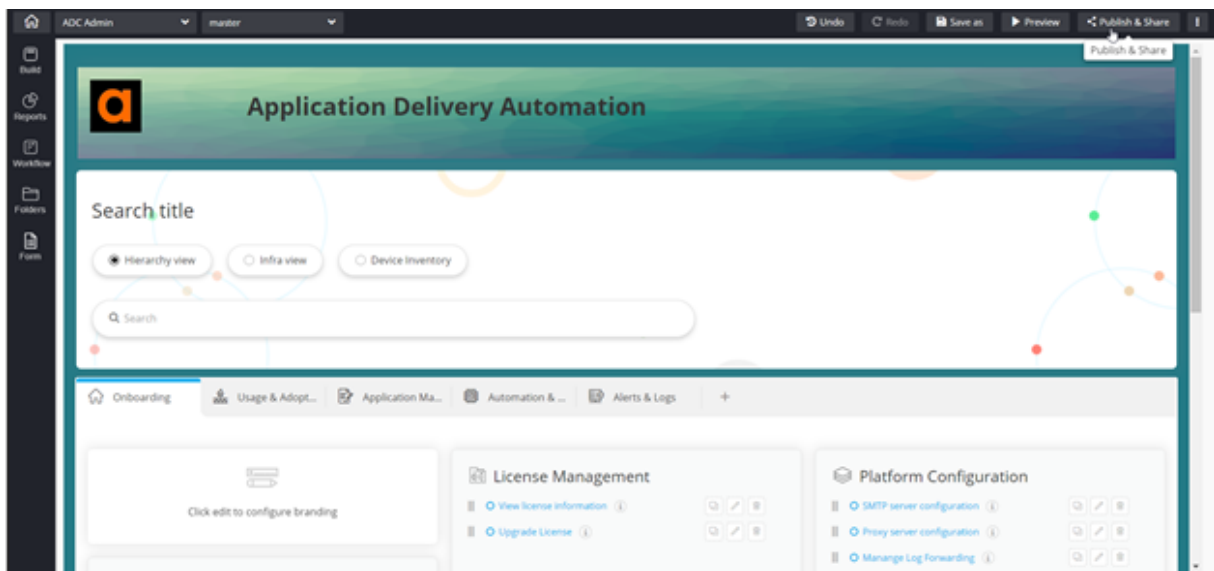
- Overview
- Sharing a page with a single or multiple user groups
- Sharing a page with a single or multiple users
- Scenarios

Overview

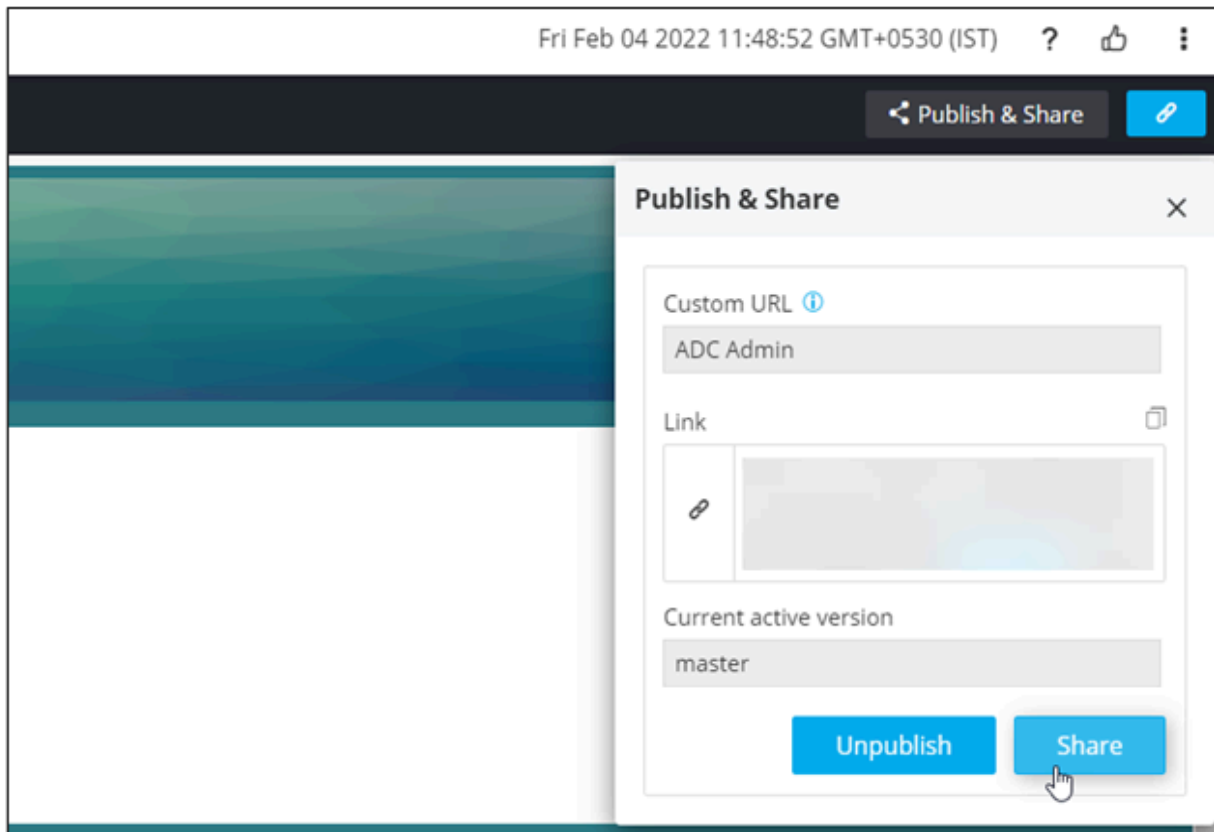
Self-service Pages module allows you to share your published pages to other users and/or user groups.

Sharing a page with a single or multiple user groups

1. Open a catalog from the [Design](#) section.
2. From the top right corner of the screen, click **Publish & Share**.



3. In the **Publish & Share** window, click **Share**.



The **Share page** pop-up window is displayed.

4. To select the usergroup with whom the page will be shared, in the **Share page** window, under **Usergroup**, select the checkbox next to the usergroup.

Share page ✕

User Usergroup

		Landing page ⓘ	Hide page header ⓘ
<input type="checkbox"/>	Select all 2 of 5 selected	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>



Note: A page can be shared with multiple user groups.

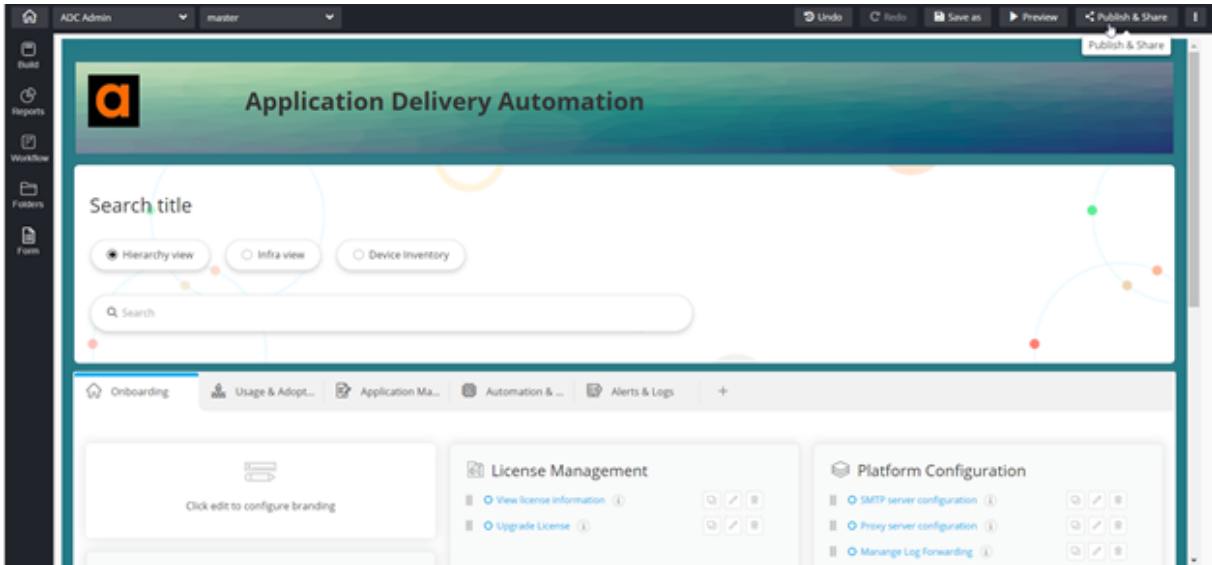
5. To share the page with the selected user group(s), click **Apply**.



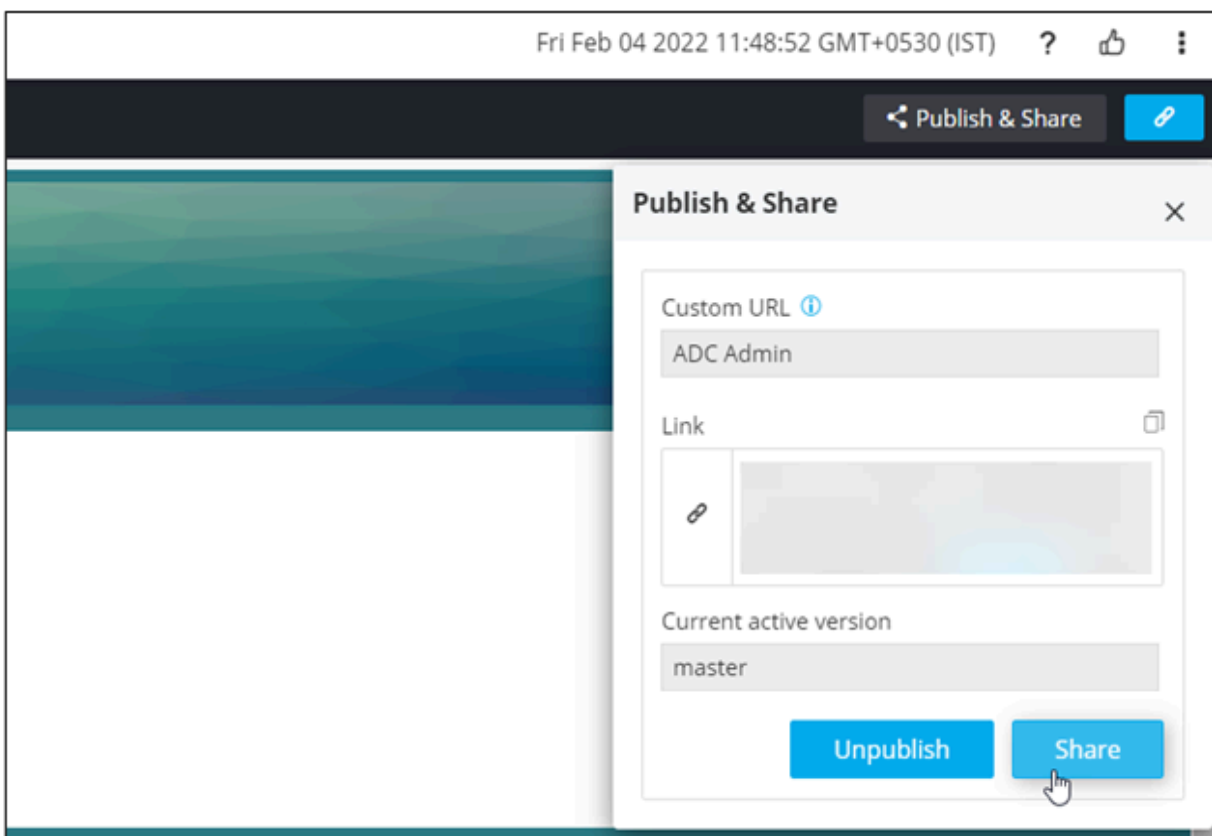
Important: To share a specific page version, ensure it is the current active version.

Sharing a page with a single or multiple users

1. Open a catalog from the [Design](#) section.
2. From the top right corner of the screen, click **Publish & Share**.



3. In the **Publish & Share** window, click **Share**.



The **Share page** pop-up window is displayed.

- To select the user with whom the page will be shared, in the **Share page** pop-up window, under **User**, select the checkbox next to the username.

User	Landing page ⓘ	Hide page header ⓘ
<input type="checkbox"/> Select all 2 of 7 selected	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> [Redacted] Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>

Apply Cancel



Note: A page can be shared with multiple users.

5. To share the page with selected user(s), click **Apply**.



Important: To share a specific page version, ensure it is the current active version.

Scenarios

When a user creates a page and shares it with another user(s) in design mode,

- All actions such as renaming the page, adding/deleting components, changes in widgets and their properties and so on made by the user who created the page will be reflected for the user(s) with which the page has been shared.

Chapter 16: Self-service Pages with Birthright Role

- [Overview](#)
- [Limitation](#)

Overview

Birthright provisioning allows external users to log into AppViewX even when they have not been assigned to any user groups. By enabling birthright to a user group, when an external user logs into AppViewX, they will see the landing page of the user groups for which Birthright has been enabled.

If an external user has been assigned to a user group then,

- If that user group does not have a landing page set up, then the landing page associated with the group for which Birthright is enabled will be the landing page for this user.
- If that user group has a landing page set up, then the landing page that appears when the user logs in will be dynamic. However, any further changes to the landing page settings will impact the landing page of this user. The latest page set as the landing page becomes the landing page of this user when they login.

Limitation

If the birthright provisioning is changed from one user group to another, for example, if the birthright was enabled for the 'Admin' user group, but now it has been enabled for the 'end user' user group, there is no change to the landing page for the user, i.e. the landing page of the 'end user' user group will not be updated.


Chapter 17: Cloning a Page

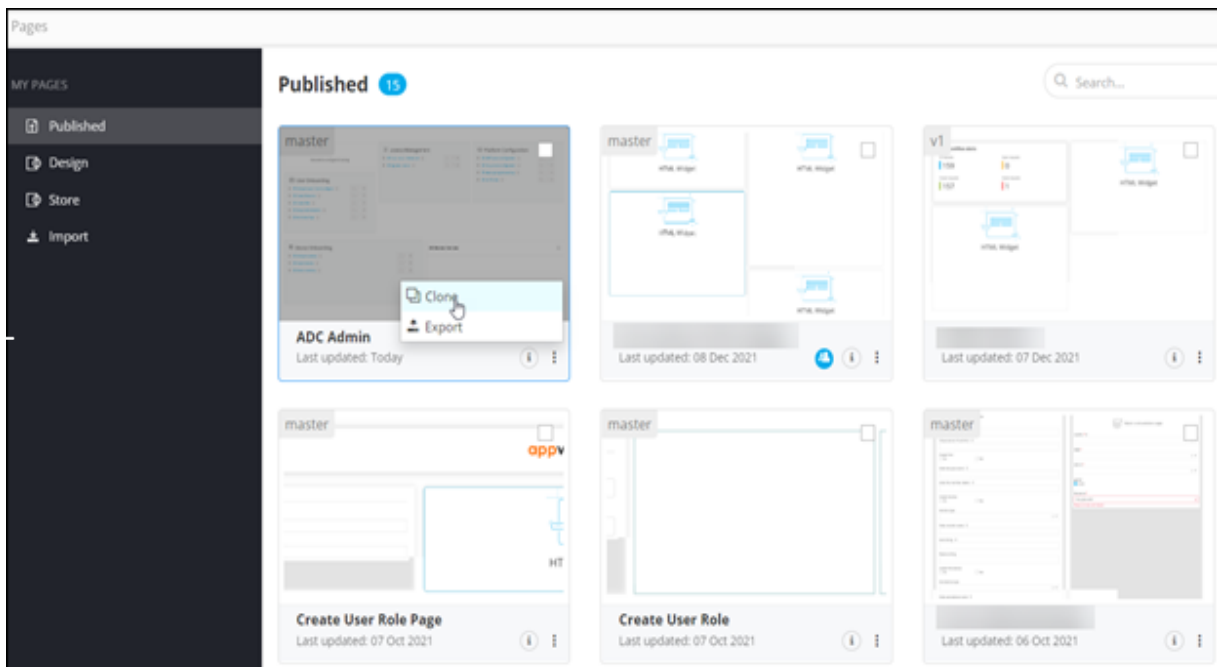
- Overview
- Cloning a Published page
- Cloning a Page in Design mode

Overview

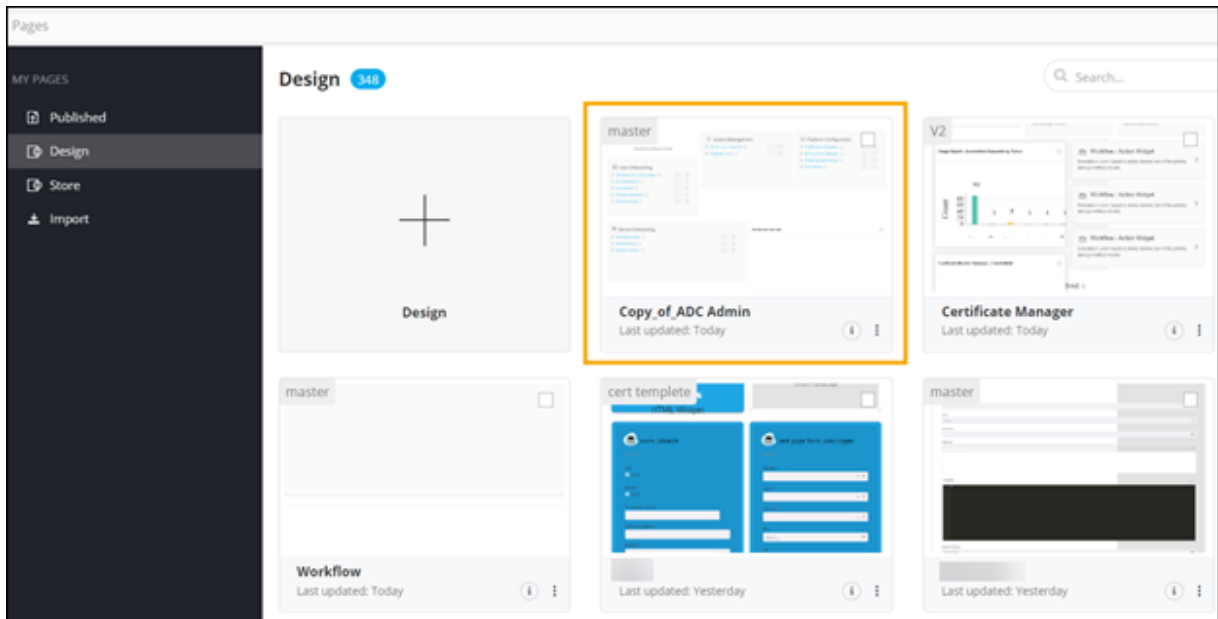
You can clone pages that are in the [Published](#) inventory as well as in the [Design](#) section.

Cloning a Published page


1. On the **Published** Inventory page, click  on the page to be cloned.
2. From the options displayed, click **Clone**.

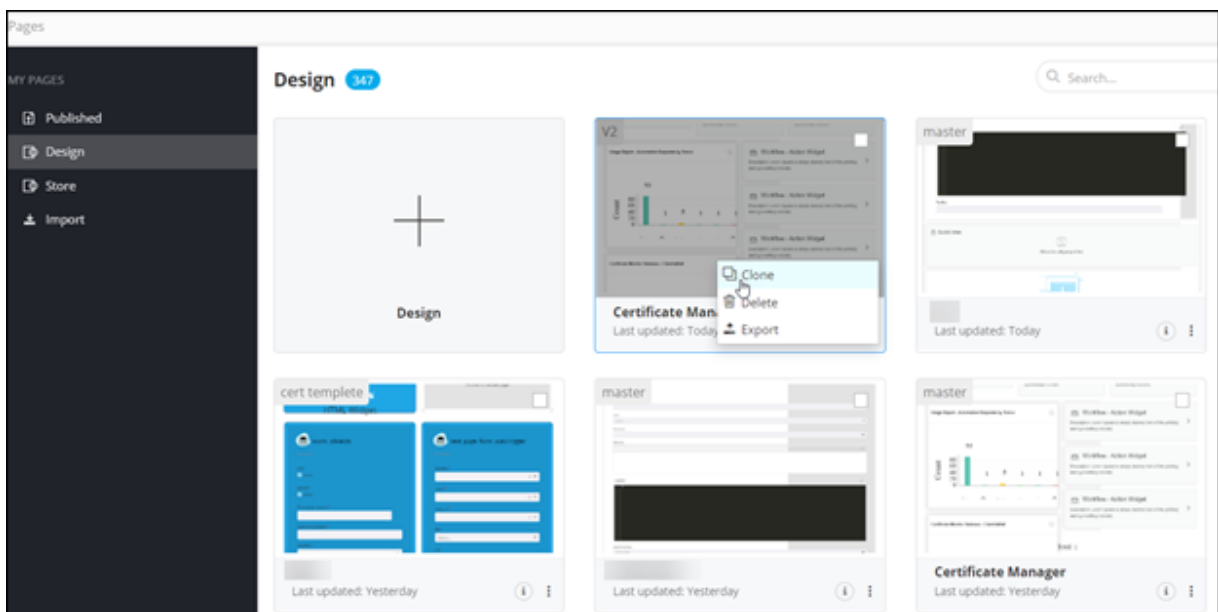


The cloned page opens in the same tab and a copy of the cloned page is added to the **Design Inventory**.

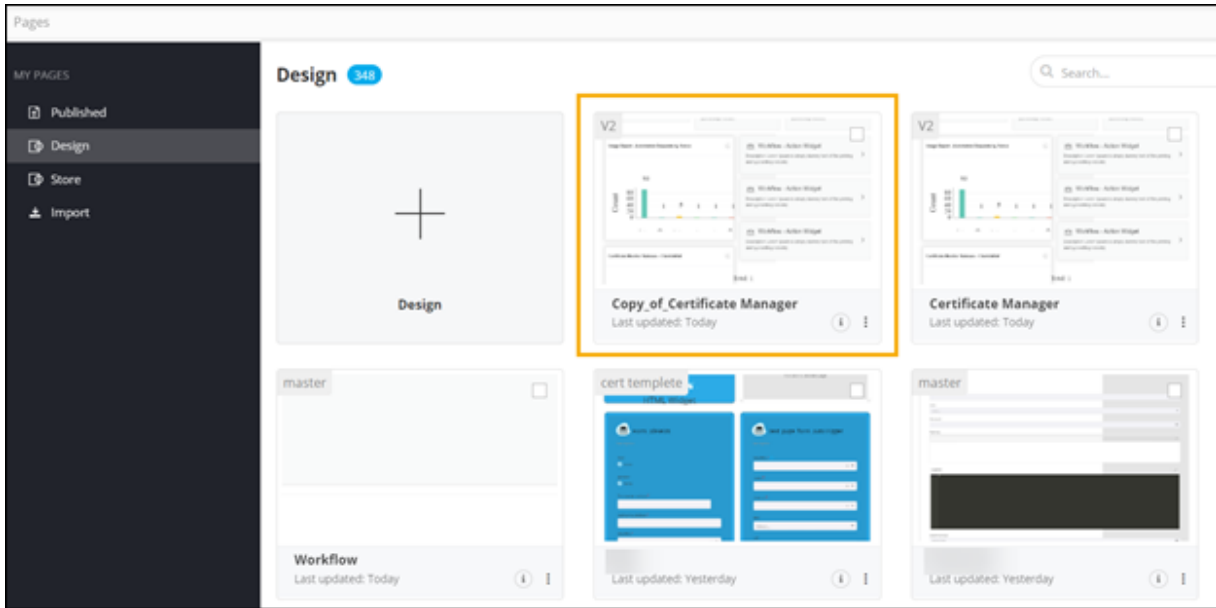


Cloning a Page in Design mode

1. On the **Design** Inventory page, click  on the page to be cloned.
2. From the options displayed, click **Clone**.



The selected page opens in the same tab and a copy of the cloned page is added to the **Design** Inventory.

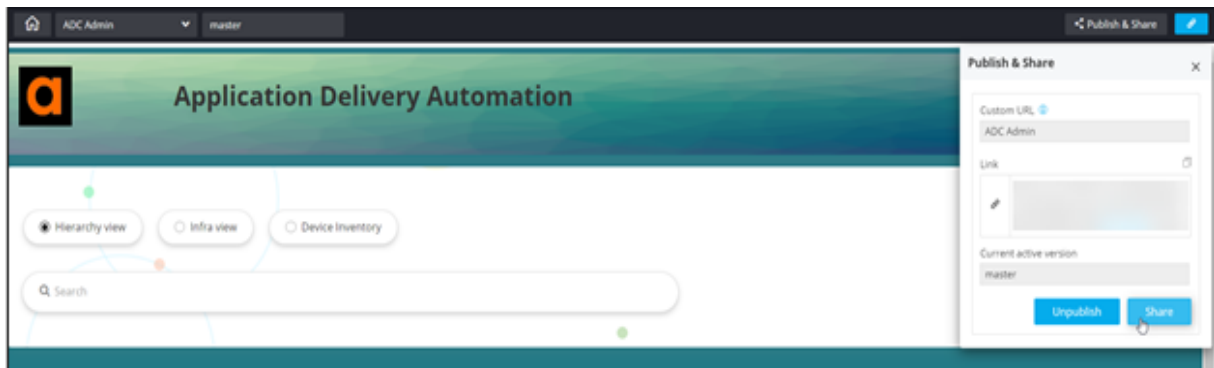


Chapter 18: Hiding the Page Header

You have the option of hiding the AppViewX header on their published pages. This can be done while sharing a published page with user(s) and/or usergroup(s).

To hide the page header:

1. Open a **Published** page.
2. From the top right corner of the screen, click **Publish & Share**.
3. In the **Publish & Share** window, click **Share**.



4. In the **Share page** window, select the user(s) from the list.
5. To hide the page header for the selected user(s), under **Hide page header**, turn on the toggle for the selected user(s).

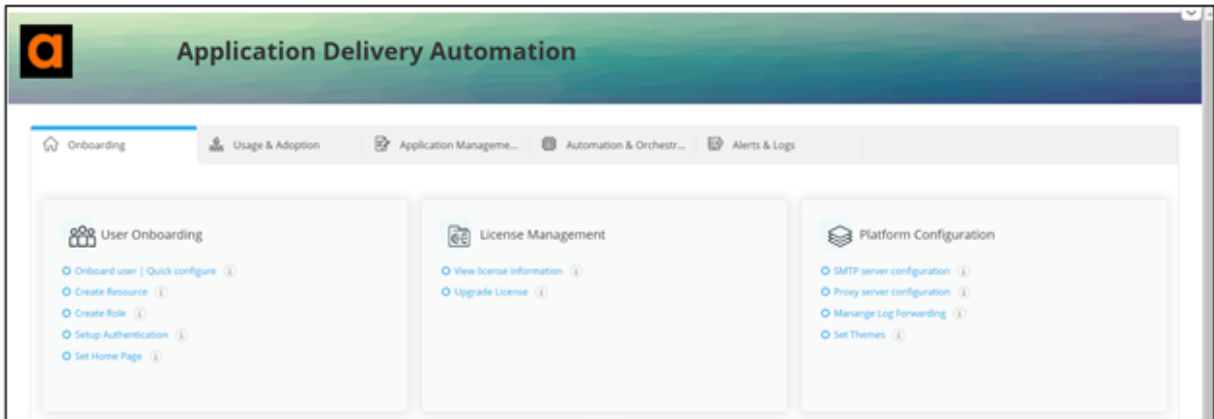
The screenshot shows a 'Share page' dialog box with a search bar and a table of user settings. The table has columns for selection, user name, landing page, and two toggle switches. Two users have their 'Hide page header' toggle turned on (blue).

<input type="checkbox"/>	User	Landing page ⓘ	Hide page header ⓘ
<input type="checkbox"/>	Select all	2 of 7 selected	<input type="checkbox"/>
<input checked="" type="checkbox"/>	[Redacted]	Landing Page :N/A	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Redacted]	Landing Page :N/A	<input type="checkbox"/>
<input type="checkbox"/>	[Redacted]	Landing Page :N/A	<input type="checkbox"/>
<input type="checkbox"/>	[Redacted]	Landing Page :N/A	<input type="checkbox"/>
<input checked="" type="checkbox"/>	[Redacted]	Landing Page :N/A	<input checked="" type="checkbox"/>
<input type="checkbox"/>	[Redacted]	Landing Page :N/A	<input type="checkbox"/>
<input type="checkbox"/>	[Redacted]	Landing Page :N/A	<input type="checkbox"/>


Buttons: Apply, Cancel

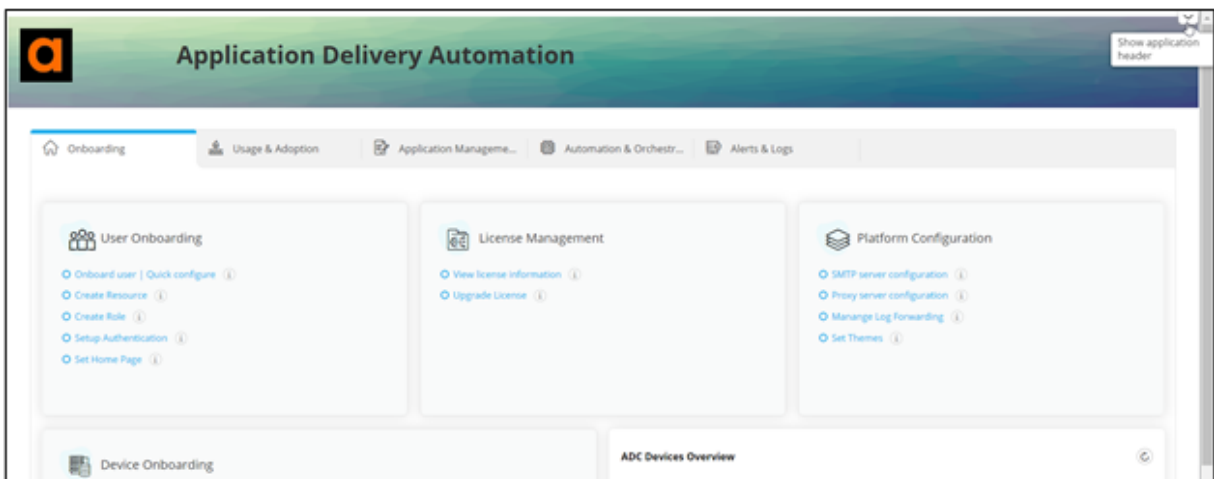
6. To implement the settings, click **Apply**.


The AppViewX header is hidden.

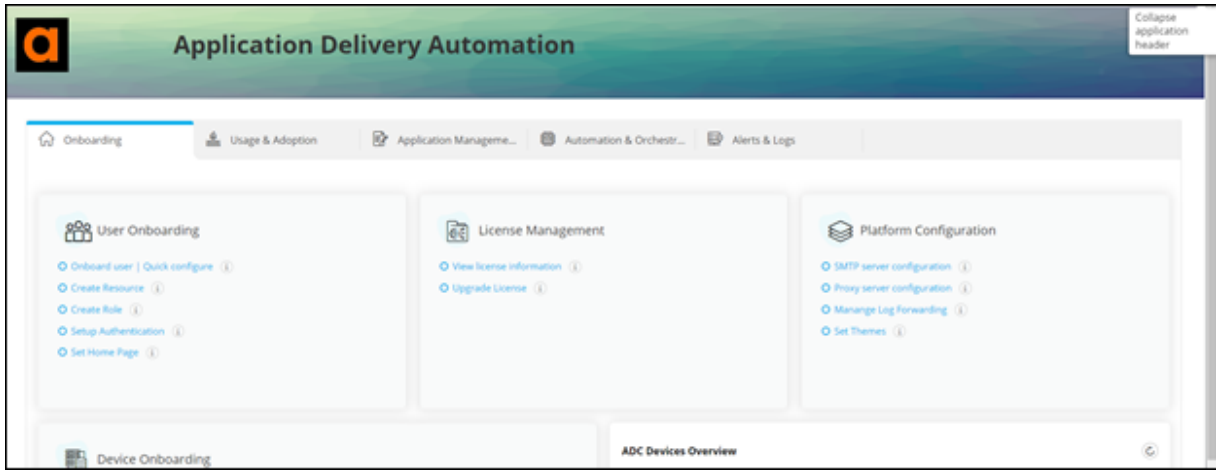


Note: The Hide page header option is independent of whether the page is set as the Landing page for a user or not. The page header will be hidden even when the Published page is accessed with its URL.

7. To show the application header, from the top right corner of the screen click .



8. To collapse the application header, from the top right of the screen, click  .



Chapter 19: Troubleshooting

Following are the common issues you may face when using the Pages module and their solutions:

Issue	Cause	Solution
Pages module does not load	1. Avx-web-visual-page-builder pod is down.2. Avx-subsystems-automation pod is down.	Restart the pods and refresh the page.
Design canvas throws error	1. avx-web-visual-page-builder pod is down.2. visual_page_builder_toolbox is not available as a web plugin/addOn.	1. Restart avx-web-visual-page-builder pod.2. Deploy the visual_page_builder_toolbox in the required location.
Page actions (Create, Publish, Share etc.) not enabled or available	The user might not have permission for page actions enabled for the same.	Enable the required page action permissions for user's role.
Landing page not set appropriately for shared users	1. Page might be shared before set landing page.2. Landing page setting might be overridden in page share tab for user/user group or application user preference.	1. Page has to be shared after setting landing page/ any page share related change2. Cross verify landing page setting in share tab and application user preference
Improper data or error in pages widget	Discrepancies in data sent/received from server.	Analyze/Share the Pages related logs listed here with dev team:1. webApp.log2. visual_page_builder_engine.log3. avx-subsystems.log

Chapter 20: Setting up the Landing Page

- Overview
- Setting up the landing page when publishing/sharing
- Setting up the landing page under user preferences

Overview

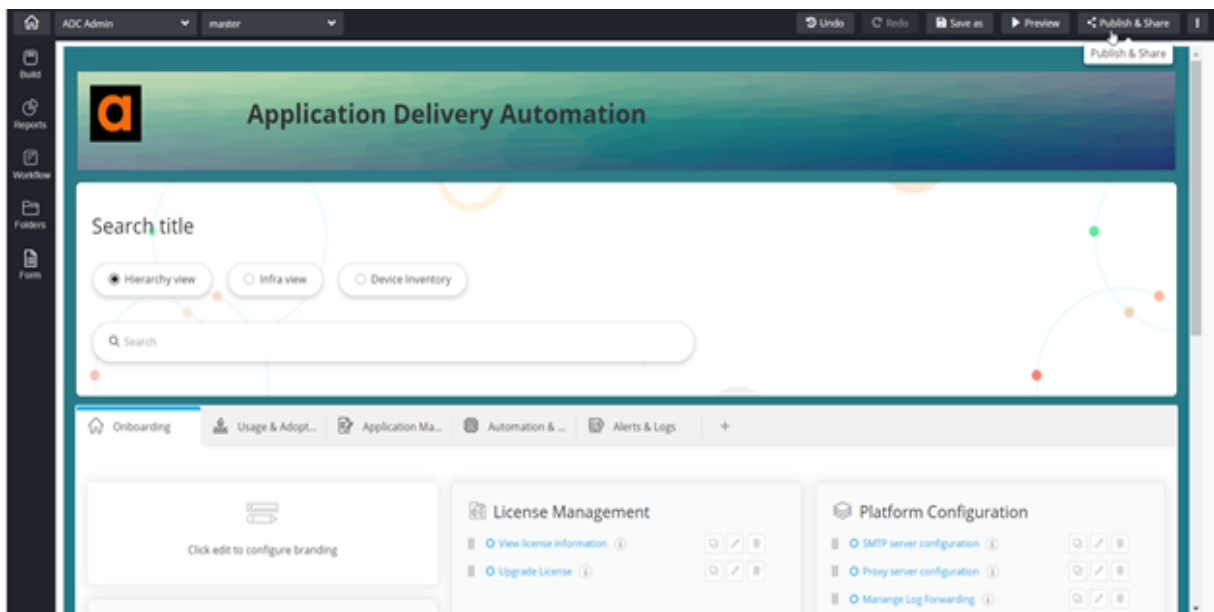
The Landing page is the page that appears first on the screen when a user logs into AppViewX. Only a Published page can be shared and set as a landing page. This Landing page can be also accessed by clicking the AppViewX logo on the top left corner of the computer screen.

! **Important:** When setting the Landing page, only the current active version of the page will be set as the Landing page.

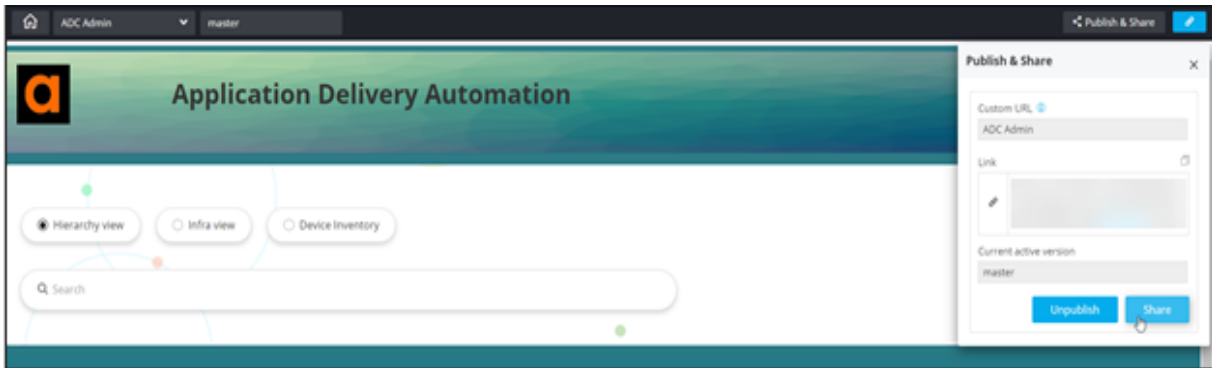
Setting up the landing page when publishing/sharing

To set the current page as a landing page for certain user(s) and/or user group(s):

1. Open a **Published** page.
2. From the top right corner of the screen, click **Publish & Share**.



3. In the **Publish & Share** window, click **Share**.



4. In the **Share page** window, select the user(s) for which the current page is to be set as the Landing page.
5. To set the current page as the landing page for selected user(s), in the **Share page** window, under **Landing page**, turn on the toggle for the selected user(s).

Share page
✕

User
Usergroup

		Landing page ⓘ	Hide page header ⓘ
<input type="checkbox"/>	Select all 2 of 7 selected	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	 Landing Page :ADC Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	 Landing Page :ADC Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	 Landing Page :N/A	<input type="checkbox"/>	<input type="checkbox"/>

Apply
Cancel

6. To implement the selected settings, click **Apply**.




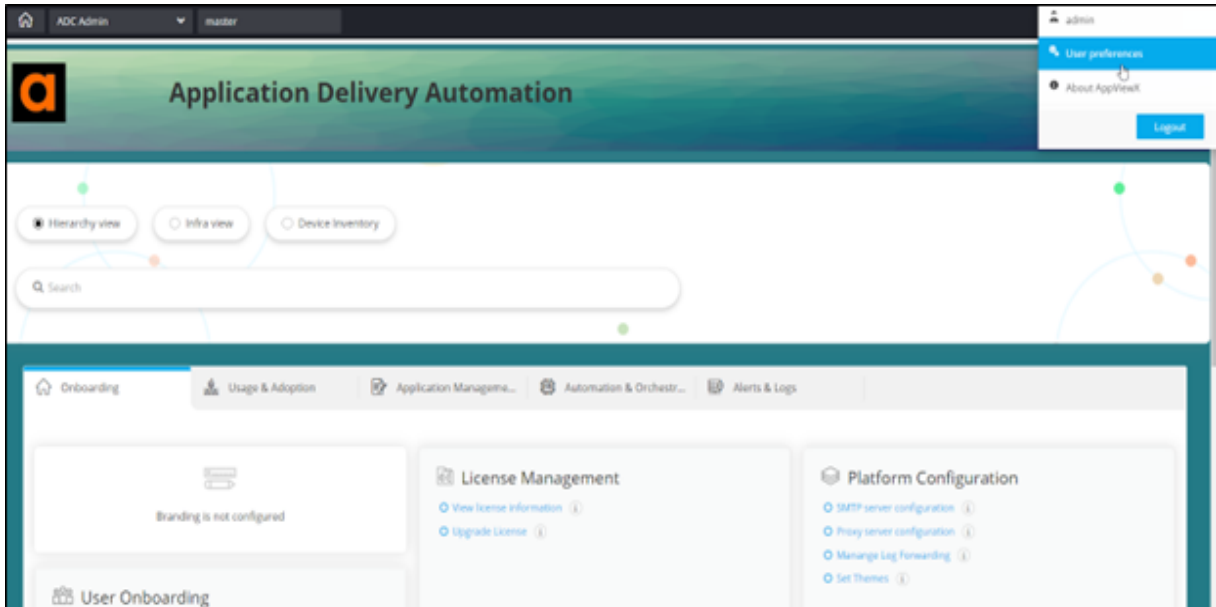
Note: The current active version of the page will be set as the Landing page for the selected users.

Setting up the landing page under user preferences

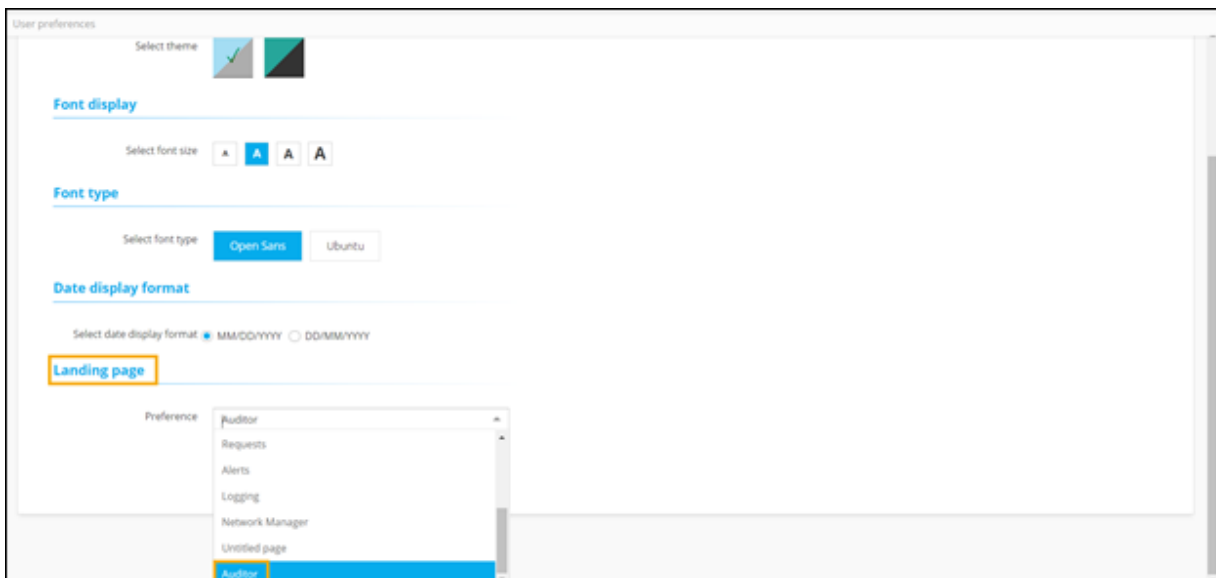
You can also set a specific page as their landing page by modifying user preferences.

To set landing page under user preferences:

1. From the top right corner of the screen, click .
2. From the options displayed, select **User preferences**.



3. On the **User preferences** page, from the drop down list, select the page that you want to set as the landing page.



4. To set the selected page as your landing page, click **Save**.