



PERDIX^{PRO} Forms

Create your own digital forms

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Thank you for choosing PERDIXPro Forms to collect data on your environmental activities.

Overview

PERDIXPro Forms and its related PERDIXPro Fieldbook App enables users to 1) create bespoke forms 2) standardise data collection 3) facilitate data collection across groups and 4) centralise collected data.

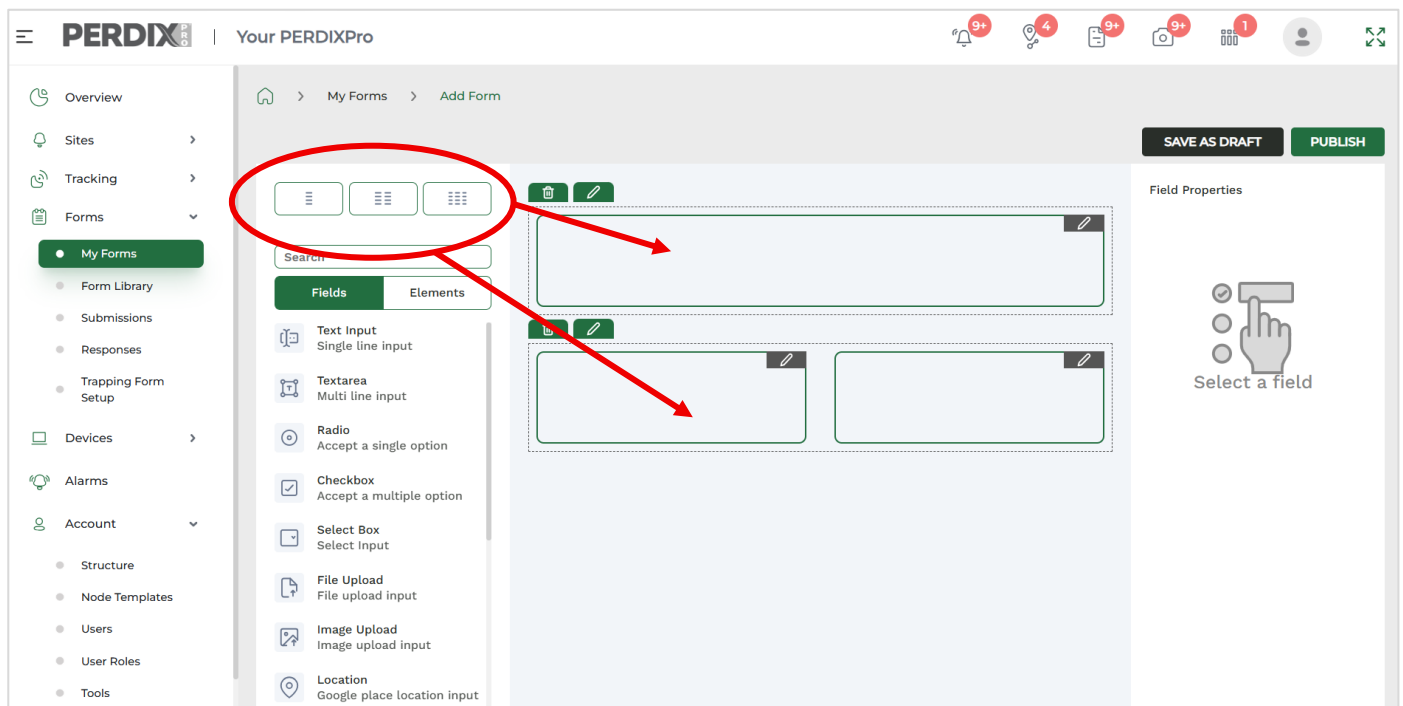
The PERDIXPro Forms can be submitted via the PERDIXPro platform by navigating to Forms > submissions or via the PERDIXPro Fieldbook App, for in-field submission.

Each PERDIXPro account has one free form to build. To purchase further forms and view your purchased form allocation total, navigate in your PERDIXPro platform to Account > Add Ons > Form Builder > Purchase.

Building a digital form

To build a digital form in PERDIXPro Forms, navigate to Forms > My Forms > Add Form. You will be presented with a blank form to start creating.

You can add boxes to your layout as you go, which will contain your survey fields.



To add elements and fields to the form, you can drag these into the boxes from their lists.

Elements

Elements are features you can add to your form to help set its structure, such as a label, a divider between questions, images to add logos and importantly, a **'BUTTON' to allow the form to be submitted** (you can change its name to 'SUBMIT' or 'SEND' if you wish).

Fields

Fields are features you can add to your form that build its content, such as date and time, setting a location, adding select and check boxes, as well as text boxes and a number counter etc. These fields will allow you to collect the data you require.

Field Properties

When you click on an element or field you have dragged to a form box, you will be able to edit information in the Field Properties area on the right of the screen.

For example, if you were adding a select box field to the form, you can change its title to a question. You can then add answer options for users to select from the drop down, if applicable.

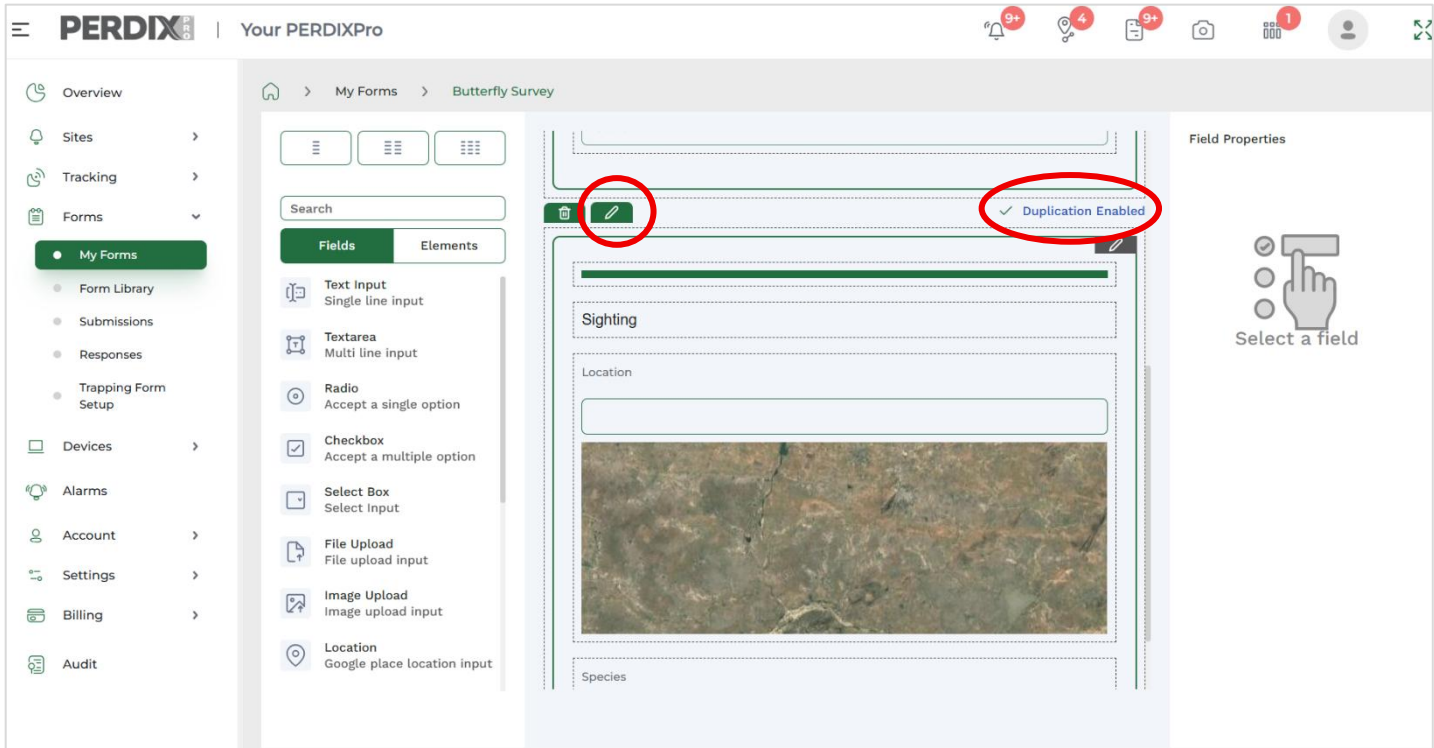
The screenshot displays the PERDIXPro form builder interface. On the left is a sidebar with navigation options: Overview, Sites, Tracking, Forms, My Forms (selected), Devices, Alarms, and Account. The main workspace shows a 'Survey Form' with three fields: a 'Date' field (dd/mm/yyyy), a 'Time' field (--:--), and a 'Weather type?' select field. The 'Weather type?' field is highlighted with a red circle, and a red arrow points to it from the 'Field Properties' panel on the right. The 'Field Properties' panel has two sections: 'SELECT PROPERTIES' and 'ADDITIONAL PROPERTIES'. In the 'SELECT PROPERTIES' section, the 'Name' is 'Weather type?' and the 'Is required' checkbox is checked. In the 'ADDITIONAL PROPERTIES' section, there are three options: 'Cloudy', 'Clear', and 'Windy', each with a trash icon. At the bottom of the panel is an 'ADD' button. The top of the interface shows the 'PERDIXPro' logo, 'Your PERDIXPro' text, and several notification icons (9+, 4, 9+, 6, 1) and a user profile icon.

You can also select the 'is required' box for the fields you would like participants to complete. Participants will not be able to submit a form unless these required fields are completed.

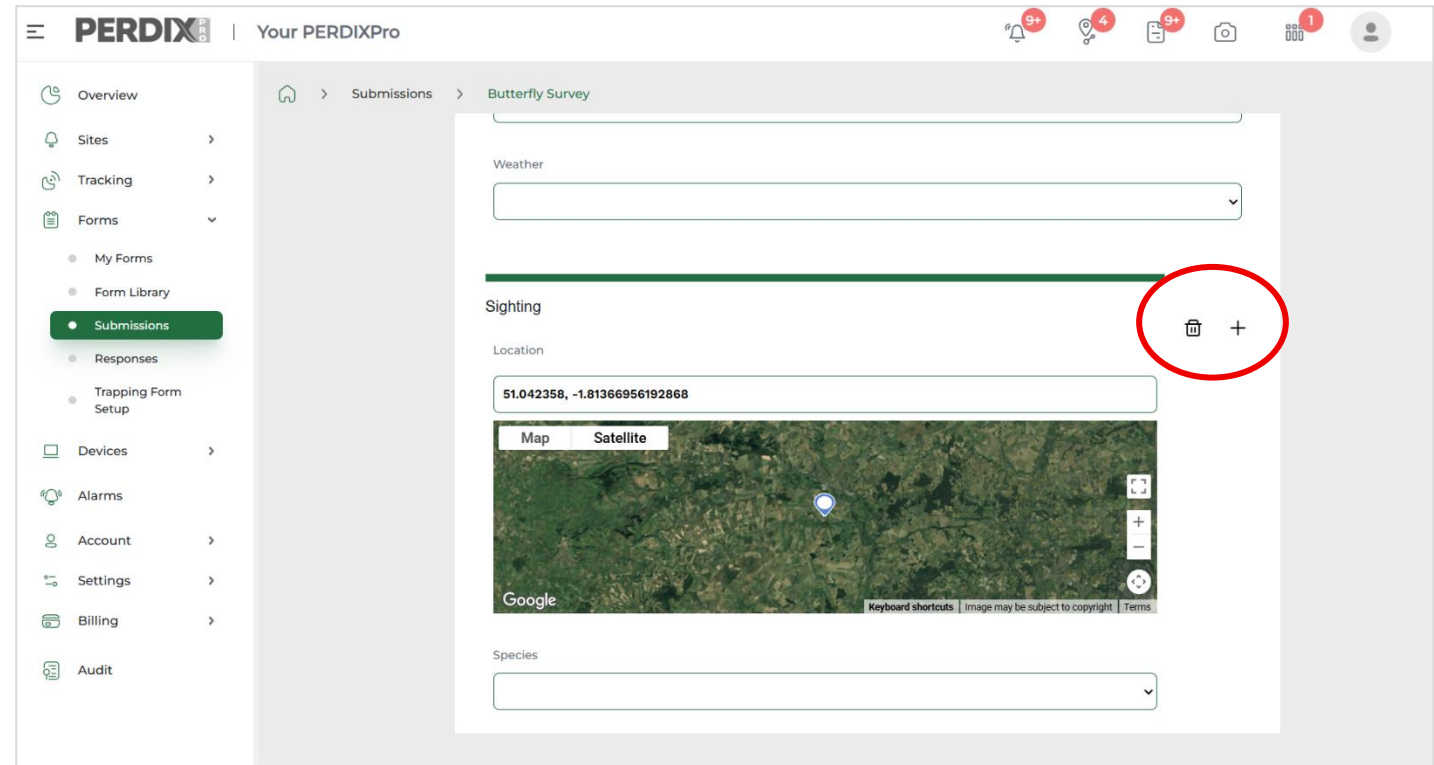
If your survey aims to record the same details against the same sighting/entity within the same survey form, you are able to duplicate a field.

For example, if you are recording butterfly sightings along a hedge line, you can add multiple entries for each butterfly sighting.

By clicking the pencil to the box of questions you would like to be able to duplicate, you can select 'duplicate field', then the box of questions will show as 'Duplication Enabled'.



When you then enter your form to submit data via Account > Submissions, you will see a plus + icon to duplicate the field. This will allow you to add multiple sightings within the same form.



Once you have completed your form and added all the questions required. You can add a 'BUTTON' which is found in the Elements list. You can change this name to 'SUMBIT' or 'SEND', for example. This will allow participants who have completed the form to send the data to your PERDIXPro account, into Forms > Responses.

To finalise your form you will now need to publish the form by clicking on PUBLISH at the top right of the form. You can then name the form and add a logo if you wish.

Your form will then be listed in Forms > My Forms, where you can assign it to areas of your structure if required, or go back and edit the form.

To submit a response to your form, navigate to Forms > Submissions, or log in to PERDIXPro Fieldbook App and click on the form.

To view responses that have been submitted you will need to navigate to Forms > Responses. Here you will see your list of forms you have created and a tally of how many responses have been received for each form. You can download all responses to Excel by clicking on the download icon next to each form. Alternatively, you can view individual responses by clicking on the eye icon. You can choose to download individual responses to a PDF or Excel.

Form Access

Forms can be assigned to various parts of your structure. If a user has access to a certain area of your structure you can give them access to the forms they require, and hide forms they do not need.

This can be done in Forms > My Forms, in the Entity column.

If a form is not assigned to any Entity, then every user will be able to view the form.

PERDIXPro

Your PERDIXPro

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Overview

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Refresh

Add Form

Title	Tools	Entity	Asset	Status	Actions
<div>Search</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	<div>Select</div>	
Fox Control Record	-	Game Management	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Deer Cull Record	-	Deer Management	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Pollinator Survey	-	Biodiversity Monitoring	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Butterfly Survey	-	Biodiversity Monitoring	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Lapwing Plot Survey	-	Lapwing Plot Monitoring	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Duck Nest Monitoring Results	-	Game Management	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Wing Survey	-	Game Management	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Hare Count	-	Biodiversity Monitoring	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>
Nest Box Camera Check	-	Nest Box Monitoring	-	PUBLISHED	<div>👁️</div> <div>✎</div> <div>🗑️</div>

The above forms have been assigned to their relevant area(s) of the account structure, so users with access to those parts of the structure will have access to those forms.

For example, a stalker invited onto the account and given access to the Game Management area of the structure, will be able to access the following forms: Fox Control Record, Deer Cull Record, Duck Nest Monitoring Results and Wing Survey.

Form assigning can also be done at Tools and Asset level.

Permissions

Account Admins (and users roles with permission) can allocate form related permissions to user roles. You can allow users to view or delete responses via ‘Form response’ and you can give permission for user roles to publish, associate, view, add, edit or delete forms via ‘My Forms’.

