

Huawei Cloud Astro Zero

User Guide (No-Code)

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Contents

1

2

2.1

2.2

2.3

3

3.1

3.2

3.3

3.4

3.5

3.6

4

4.1

4.2

4.3

4.4

4.5

4.6

4.6.1

4.6.2

4.6.3

4.6.4

4.6.5

4.6.6

4.6.7

4.6.8

4.6.9

4.6.10

4.6.11

4.6.12

4.6.13

Creating No-Code Applications.....

Authorizing Users to Use Huawei Cloud Astro Zero and Purchase Instances.....

Creating and Authorizing a User to Use Huawei Cloud Astro Zero.....

Applying for Free Trial.....

Purchasing a Standard Instance.....

Creating a No-Code Application.....

Logging In to the No-Code Workbench.....

Creating No-Code Applications on PCs.....

Creating No-Code Applications on Mobile Devices.....

Managing No-Code Applications on PCs.....

Managing No-Code Applications on Mobile Devices.....

Creating a Form or Process.....

Form/Process Overview.....

Creating a Form.....

Creating a Process.....

Creating an External Link.....

Adding Widgets For a Form.....

Setting Form Widget Properties.....

Setting the Properties of the Single-Line Text Widget.....

Setting the Properties of the Multi-Line Text Widget.....

Setting the Properties of the Value Input Widget.....

Setting the Properties of the Percentage Widget.....

Setting the Properties of the Phone Widget.....

Setting the Properties of the Email Address Widget.....

Setting the Properties of the URL Widget.....

Setting the Properties of the Amount Widget.....

Setting the Properties of the Time and Date Widget.....

Setting the Properties of the Single-Choice Widget.....

Setting the Properties of the Multi-Choice Widget.....

Setting the Properties of the Associated Record Widget.....

Setting the Properties of the User Widget.....

1

4

4

7

8

12

12

13

22

27

41

60

75

75

78

83

94

102

105

105

111

117

123

129

135

140

144

148

154

165

172

178

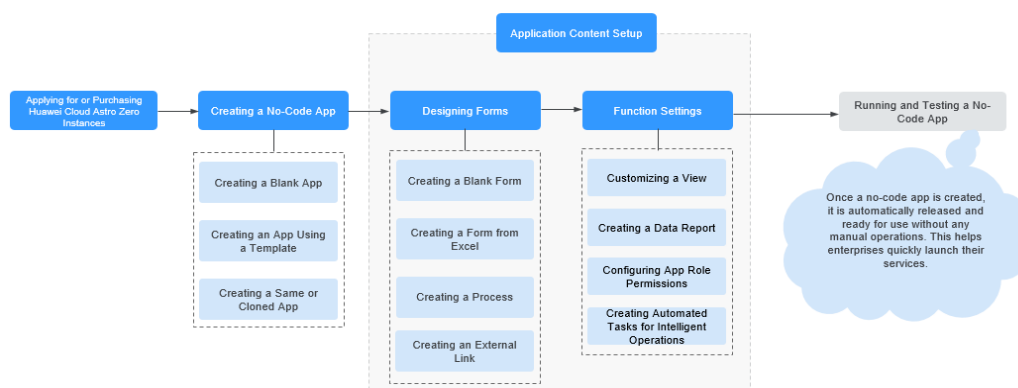
4.6.14 Set the Properties of the Reference Widget.....	187
4.6.15 Set the Properties of the Summary Widget.....	192
4.6.16 Set the Properties of the Attachment Widget.....	197
4.6.17 Setting the Properties of the Formula Widget.....	200
4.6.18 Setting the Properties of the Child Table Widget.....	205
4.6.19 Setting the Properties of the Matrix Table Widget.....	209
4.6.20 Setting the Properties of the Text Combination Widget.....	216
4.6.21 Setting the Properties of the Department Widget.....	219
4.6.22 Setting the Properties of the Location Widget.....	225
4.6.23 Setting the Properties of the Rich Text Widget.....	230
4.6.24 Setting the Properties of the Auto Numbering Widget.....	235
4.6.25 Setting the Properties of the Title Widget.....	241
4.6.26 Setting Properties of the Images and Text Widget.....	244
4.6.27 Setting the Properties of the Image Widget.....	248
4.6.28 Setting the Properties of the Segment Widget.....	252
4.7 Setting Process Widget Properties.....	258
4.7.1 Setting the Properties of the Process Initiation Node.....	258
4.7.2 Setting the Properties of an Approval Node.....	260
4.7.3 Setting the Properties of a Fill-In Node.....	265
4.7.4 Setting the Properties of a CC Node.....	269
4.7.5 Setting Properties of a Parallel Branch Node.....	272
4.7.6 Setting Properties of a Condition Branch Node.....	274
4.8 Customizing a Form.....	276
4.9 Setting the Form Visibility Permission.....	283
4.10 Sharing Forms.....	284
4.11 Creating a Form Filling Page for a Form.....	286
4.12 Setting Anonymous Form Filling.....	291
4.13 Managing Forms on PCs.....	292
4.14 Managing Forms on Mobile Devices.....	321
4.15 Managing Processes.....	331
4.16 Managing External Links.....	344
5 Customizing a View.....	352
5.1 View Overview.....	352
5.2 Creating a View.....	352
5.3 Managing Views.....	366
6 Creating a Data Report.....	375
6.1 Creating a Data Report.....	375
6.2 Adding Widgets to a Report.....	381
6.3 Setting the Properties of Widgets on Data Reports.....	382
6.3.1 Setting the Properties of the Pie Chart Widget.....	382
6.3.2 Setting the Properties of the Bar Chart Widget.....	389
6.3.3 Setting the Properties of the Line Chart Widget.....	396

6.3.4 Setting the Properties of the Summarized Value Widget.....	401
6.3.5 Setting the Properties of the Pivot Table Widget.....	406
6.4 Managing Data Reports.....	414
7 Configuring Application Role Permissions.....	421
7.1 Application Role Permission Overview.....	421
7.2 Customizing a System-Level Role.....	425
7.3 Customizing an Application-Level Role.....	428
7.4 Adding Users to a System-Level Role.....	434
7.5 Activating a User in an Application.....	438
7.6 Logging In to the Application As a Portal User and Submitting a Questionnaire.....	443
8 Creating Automated Tasks for Intelligent Operations.....	451
8.1 Automated Task Overview.....	451
8.2 Creating an Automated Task.....	451
8.3 Managing Automated Tasks.....	466

1 Creating No-Code Applications

On the no-code workbench, you can create applications by simply dragging and dropping without coding. Before starting, read this section to understand how to use the no-code workbench.

Figure 1-1 Process of using the non-code workbench



Purchasing or Applying for a Huawei Cloud Astro Zero Instance

First, apply for a **free** instance or purchase a **standard instance**. An instance is an independent resource space. Resources of different instances are isolated from each other.

- **Applying for Free Trial:** Apply for a free instance, which provides a runtime environment for no-code application development with limited resources.
- **Purchasing a Standard Instance:** Purchase a standard instance for no-code application development. Huawei Cloud Astro Zero's professional edition also supports no-code application development. For details about the differences between editions, see [Edition Differences](#).

Creating No-Code Applications

You can create no-code applications on the no-code workbench, using PCs or mobiles.

- For PCs
 - **Creating a Blank Application:** Create a blank application.
 - **Creating a Same Application:** Create a same application or clone an application.
- For mobiles
 - **Creating a Blank Application:** Create an application from scratch.

Creating a Form or Process

To create an application, start with a form or process. You can use over 20 controls to customize it.

- Creating common forms for collecting and sharing data, and following events
 - **Creating a Blank Form:** Drag and arrange widgets that match the field data type on the canvas to create a form. A form, along with its views and statistical tables, make up an application.
 - **Creating a Form from Excel:** Design the form fields and data in Excel. Then, import it to quickly create a form.
- Creating processes for business approvals, teamwork, and task coordination
 - **Creating a Process:** Tasks like trip requests or service ticket assignments need several roles to act in order. Create a process to guide them.
- Creating external links for quick integration of applications with external resources
 - **Creating an External Link:** Create external links to add external pages into no-code applications. This enhances applications functionality.

For simple service applications, you can create a form to record and manage data.

Customizing a View

By default, each form in the no-code workbench has a table view named **All**. You can customize this view. **You can use views to show just the data you need. You can change how the views look.**

Creating a View: A view is a page that shows different data based on roles and services. A form can have many views. All views of the same form share the same data. Any changes to the data will update across all these views.

Creating a Data Report

You can create data reports to study trends and make decisions.

Creating a Data Report: You can create statistics pages and use widgets such as pie charts, bar charts, and totals to show data in different ways. This helps you check, study, and sum up the data.

Configuring Application Role Permissions

In applications, there are system roles (no-code developer, data manager, and enterprise member) and custom roles. **You can configure different permissions for them.**

- **Application Role Permission Overview:** An application needs different roles to work together. Each role can do different things with the data. There are two types of roles: system roles and custom roles.
- **Customizing a System-Level Role:** In addition to the three system roles: no-code developer, data manager, and enterprise member, application administrators can customize roles.
The free edition does not support role customization. Buy the standard or professional edition to customize roles.
- **Customizing an Application-Level Role:** Customize roles to give users certain pages and permissions, deciding what they can see and do.
- **Adding Users to a System-Level Role:** Application administrators can add users to each role and create or delete users.
- **Activating a User in an Application:** By setting application security, an application creator can add other users to manage the application and its background data.

Creating an Automated Task

Automated tasks make work faster. You can set one up so that when you change a form and the data meets the rule, the task updates the other form at the same time. Automation is ideal for handling repetitive tasks to boost efficiency.

Creating an Automated Task: Create an automated task with rules. This lets the application do certain operations by itself. It works faster and has fewer mistakes.

Testing a No-Code Application

No-code applications start working after you create them. This helps businesses launch services fast.

2 Authorizing Users to Use Huawei Cloud Astro Zero and Purchase Instances

2.1 Creating and Authorizing a User to Use Huawei Cloud Astro Zero

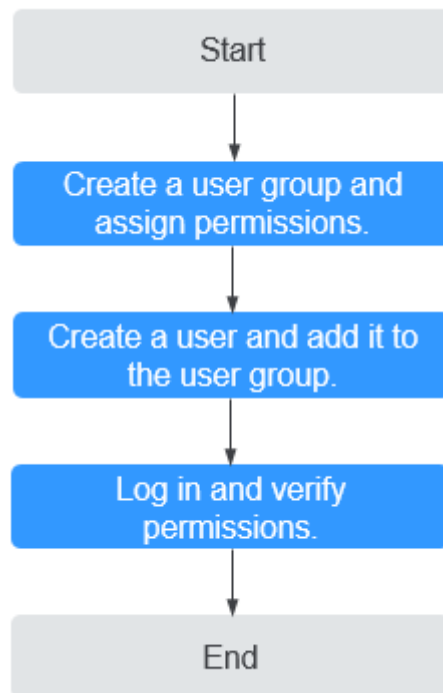
Use **IAM** for fine-grained permissions control on your Huawei Cloud Astro Zero resources. With IAM, you can:

- Create IAM users for employees. This gives each IAM user their own security credentials to use resources.
- Assign users only the permissions they need for a task.
- Entrust a Huawei account or cloud service to perform efficient O&M on resources.

Operation Scenario

When you sign up for Huawei Cloud, you get an account. This account can use all your resources and pay for them. For security purposes, create an IAM user with the **Astro Zero Instance ManageAccess** and **Astro Zero Instance ManageAccess** system policies. With these, the IAM user can purchase Huawei Cloud Astro Zero instances, add other IAM users of the same Huawei Cloud account to Huawei Cloud Astro Zero, and assign them the administrator or developer permissions.

Figure 2-1 Assigning permissions to a user



Prerequisites

Before assigning permissions to a user group, learn about the system policies. For details, see [Permissions Management](#). For the permissions of other services, see [System-defined Permissions](#).

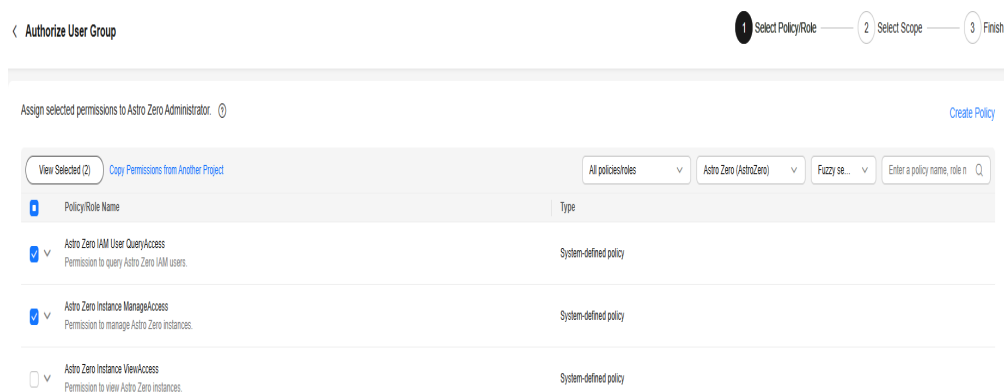
Creating an IAM User and Assigning Permissions

IAM users with the **Astro Zero Instance ManageAccess** and **Astro Zero IAM User QueryAccess** permissions can purchase instances and add other IAM users of the same Huawei Cloud account to Huawei Cloud Astro Zero. If the IAM user only needs to purchase instances, only the **Astro Zero Instance ManageAccess** permission needs to be assigned to the user group. For details about the system policies, see [Permissions Management](#).

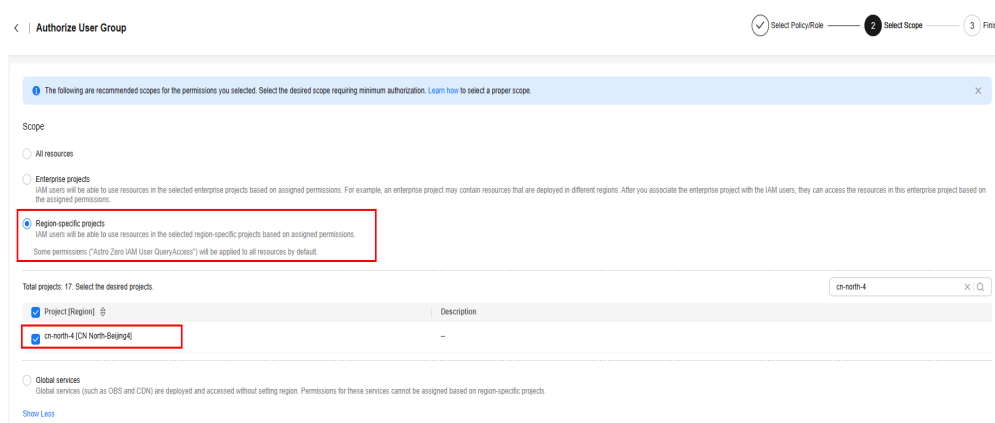
Step 1 Log in to the [IAM console](#).

Step 2 Create a user group and assign permissions to it.

1. Choose **User Groups** and click **Create User Group**.
2. Enter a user group name and click **OK**.
3. In the user group list, click **Authorize** next to the created user group.
4. Select **Astro Zero Instance ManageAccess** and **Astro Zero IAM User QueryAccess** and click **Next**.

Figure 2-2 Assigning required permissions to a user group

5. Select the authorization scope and click **OK**.

Figure 2-3 Assigning permissions to the user group to which an IAM user belongs (Setting the min. authorization scope)**Step 3** Create an IAM user and add the user to the user group.

1. Choose **Users** and click **Create User**.
2. Configure basic information and click **Next**.
For details about the parameters, see [Creating an IAM User](#).
3. Select the user group created in [Step 2](#) and click **Create User**.

Step 4 Use the IAM user added in [Step 3](#) to log in to Huawei Cloud Astro Zero and apply for a free instance or purchase a commercial one.

1. Log in to the [Huawei Cloud Astro Zero console](#) using an IAM account.

Figure 2-4 Logging in as an IAM user

The figure illustrates the process of logging in as an IAM user. It shows two login interfaces. The left interface is the 'HUAWEI ID login' page, which has fields for 'Phone/Email/Login ID/HUAWEI CLOUD account name' and 'Password', a 'LOG IN' button, and links for 'Register' and 'Forgot password?'. Below these is a 'Use Another Account' section with a red box around 'IAM User' and a 'More' dropdown. The right interface is the 'IAM User Login' page, which has fields for 'Tenant name or Huawei Cloud account name', 'IAM username or email address', and 'IAM user password', a 'Log In' button, and links for 'Forgot Password' and 'Remember me'. A red arrow points from the 'IAM User' link in the left interface to the 'IAM User Login' page.

2. Apply for a free instance or purchase a commercial one by referring to the operations in [Applying for Free Trial](#) and [Purchasing a Standard Instance](#).

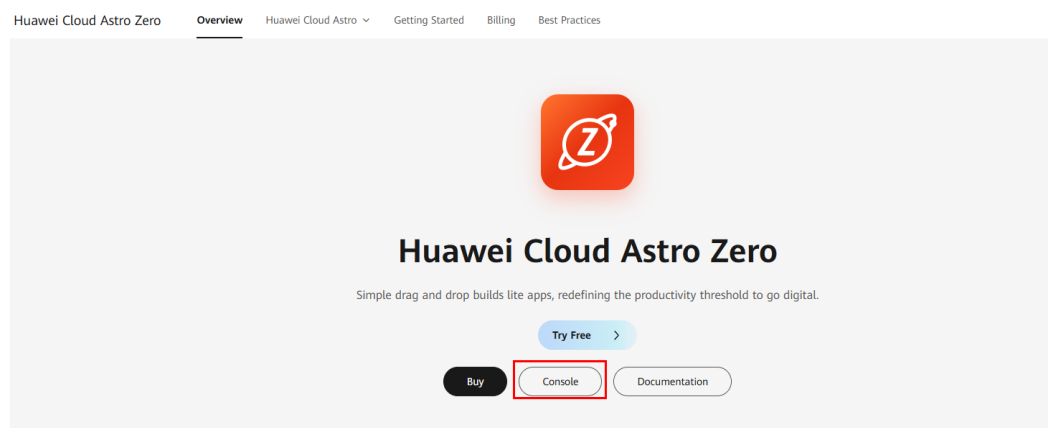
-----End

2.2 Applying for Free Trial

You can apply for a free instance with limited resources. This instance has no time limit and does not require unsubsubscription or resource release.

Procedure

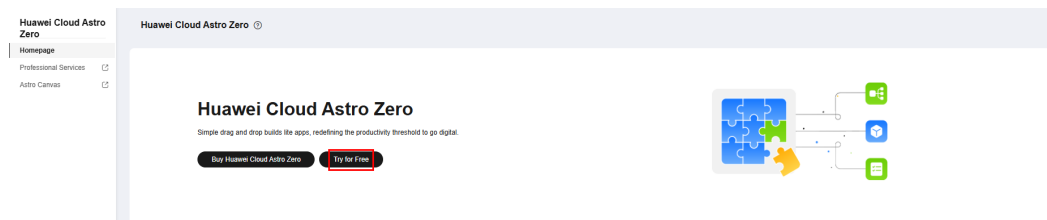
- Step 1** Log in to the [Huawei Cloud official website](#) as an IAM user created in [Creating and Authorizing a User to Use Huawei Cloud Astro Zero](#).
- Step 2** In **Products**, choose **Developer Services > Huawei Cloud Astro Zero**.
- Step 3** On the product introduction page, click **Console**.

Figure 2-5 Accessing the Huawei Cloud Astro Zero console

Step 4 On the console, click **Try for Free**.

For details about the specifications of free instances, see [Edition Differences](#).

Figure 2-6 Clicking Try for Free



Step 5 On the displayed page, click **Try for Free**.

Figure 2-7 Enabling an instance for free

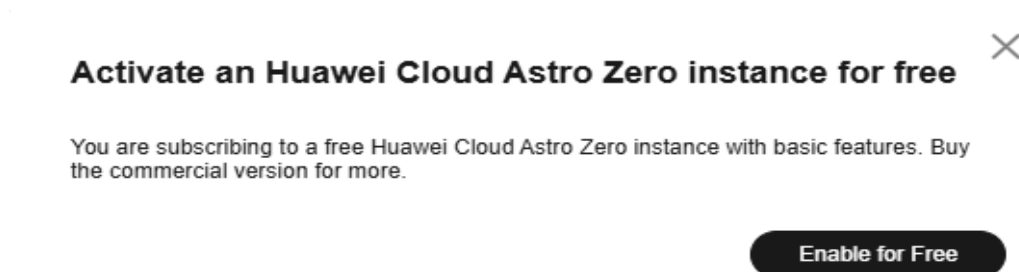
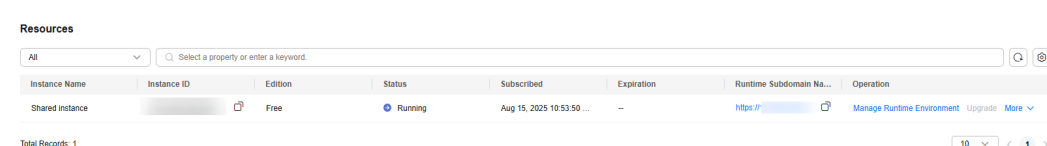


Figure 2-8 A free instance



Step 6 (Optional) Renew or unsubscribe from a created instance.

- Choose **More** > **Check Details** to view details about the instance.
- Choose **More** > **Unsubscribe** to unsubscribe from the instance.
- Choose **More** > **Synchronize IAM User** to update user information to Huawei Cloud Astro Zero after deleting a user in IAM or updating the email address.

-----End

2.3 Purchasing a Standard Instance

Huawei Cloud Astro Zero has standard and professional editions. Both are good for no-code application development. The standard edition requires no coding experience and is the first choice for enterprises. For details, see [Edition Differences](#).

Procedure

- Step 1** Use the IAM user created in [Creating and Authorizing a User to Use Huawei Cloud Astro Zero](#) to [purchase a standard instance](#).
- Step 2** On the page for purchasing an instance, set related parameters and click **Buy Now**.

Figure 2-9 Purchasing a standard instance

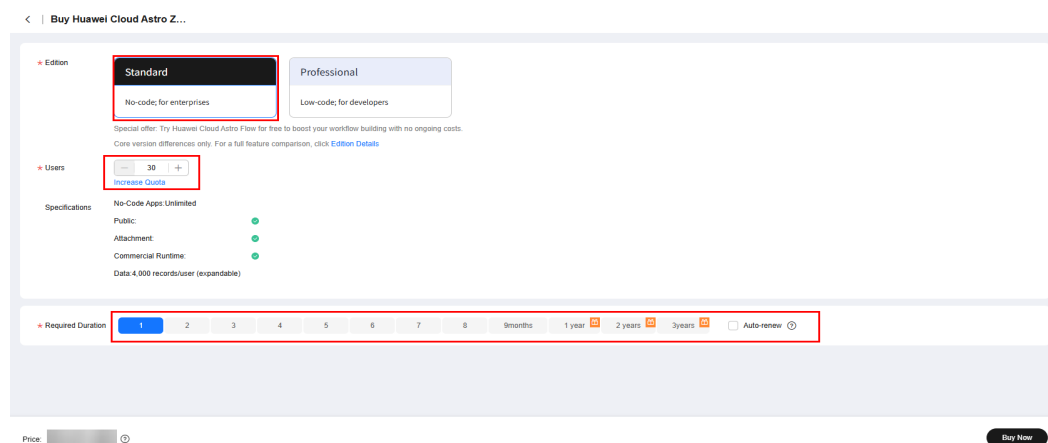


Table 2-1 Parameters for purchasing a standard instance

Parameter	Description
Edition	Select the standard edition. It is ideal for enterprises to develop no-code applications.
Users	The maximum number of users, including portal users, that can be added to an instance.
Specifications	For details about the specifications, see Edition Differences .
Required Duration	Select a validity period for the instance. The value ranges from 1 month to 3 years.

- Step 3** Select a payment method and pay for the order.

Figure 2-10 Making payment

Buy Huawei Cloud Astro Zero

Confirm the orders in Aug 22, 2025 23:59:59 GMT+08:00. Otherwise, the order will be automatically canceled.

Cloud Service Orders

Order No.	Product Type	Service Provider	Order Amount	Total
CS251 SFK	Astro Zero AstroZero	Huawei Cloud		

Payment Method

Payable (tax excluded)

Monthly Settlement

You are a budgeted customer. Huawei Cloud will deduct this payment from your budget, and assign the actual payment amount (calculated based on the internal price) to the beneficiary department or project of your account. The internal price is different from the price displayed above. You can search Huawei W3 for the related cloud service settlement rules.

This amount does not include tax. The tax will be included in the final bill generated in the following month.

Monthly Settlement

Confirm

Step 4 After you pay for the order, return to the Huawei Cloud Astro Zero console.

Step 5 After the standard instance is created, you can access the runtime environment.

It takes several minutes to create an instance. After the instance is created, the platform presets a default subdomain name for the runtime environment. The default domain name is for background tasks like to-do tasks and email reminders. Enterprise members can use it to log in to an application.

Figure 2-11 Viewing the created instance

Resources

All Select a property or enter a keyword

Instance Name	Instance ID	Edition	Status	Subscribed	Expiration	Runtime Subdomain Na...	Operation
Shared instance	372160e5e9a8b0d2...	Standard	Running	Aug 15, 2025 11:23:38 G...	--	https://xGPyBly9po...	Manage Runtime Environment Upgrade More

Total Records: 1

Step 6 (Optional) Renew or unsubscribe from a created instance.

Figure 2-12 Managing purchased instances

Resources

All Select a property or enter a keyword

Instance Name	Instance ID	Edition	Status	Subscribed	Expiration	Runtime Subdomain Na...	Operation
Shared instance	372160e5e9a8b0d2...	Standard	Running	Aug 15, 2025 11:23:38 G...	--	https://xGPyBly9po...	Manage Runtime Environment Upgrade More

Total Records: 1

Video Tutorials

- Huawei Cloud Astro Zero: Low-Code De... 5:21
- Users and Permissions 5:43
- Quick-Start Questionnaires with Templa... 7:44
- Rapid Deployment of Low-Code Apps 7:08

- Click **Manage Runtime Environment** to access the runtime environment.
- Click **Upgrade** to increase the number of users and upgrade the specifications of the purchased instance.
- Choose **More > Renew** to extend the subscription.

- Choose **More > Check Details** to view details about the instance. In the development and runtime environments, resources created by tenants are also displayed on the details page.
- Choose **More > Unsubscribe** to unsubscribe from the instance as prompted. The instance will be degraded to the free edition. Unsubscription does not delete the data.
- Choose **More > Synchronize IAM User** to update user information to Huawei Cloud Astro Zero after deleting a user on IAM or updating the email address.

----End

3 Creating a No-Code Application

3.1 Creating a No-Code Application

What Is a No-Code Application?

A no-code application is made up of forms, processes, and reports (as shown in [Figure 3-1](#)). It helps you record data, work with others, approve things, and visualize data. Each square in [Figure 3-2](#) represents an application.

You can use forms to collect and manage data, processes for teamwork, and reports to study and display data.

Figure 3-1 Relationships between applications and forms, processes, and reports

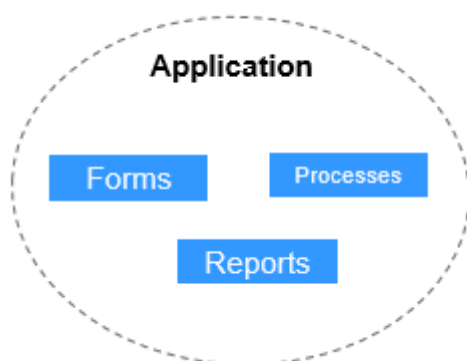
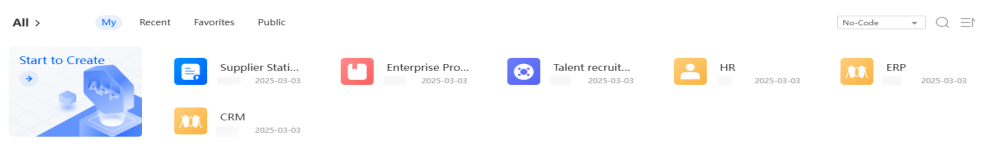


Figure 3-2 Each square icon represents an application



Procedure

On the no-code workbench, you can create a no-code application as follows:

- **Creating a Blank Application:** Create a no-code application from scratch.
- **Creating a Same Application** and **Cloning an Application:** Copy an application and modify it. This improves efficiency.

3.2 Logging In to the No-Code Workbench

Once your instance is ready, log in to the no-code workbench and create applications.

Logging In to the No-Code Workbench on PCs

- Step 1** Go to the [Huawei Cloud Astro Zero console](#).
- Step 2** On the homepage, click **Access Homepage**. The application development page is displayed.
- Step 3** On the top menu bar, click **Workbench**.

Figure 3-3 Workbench

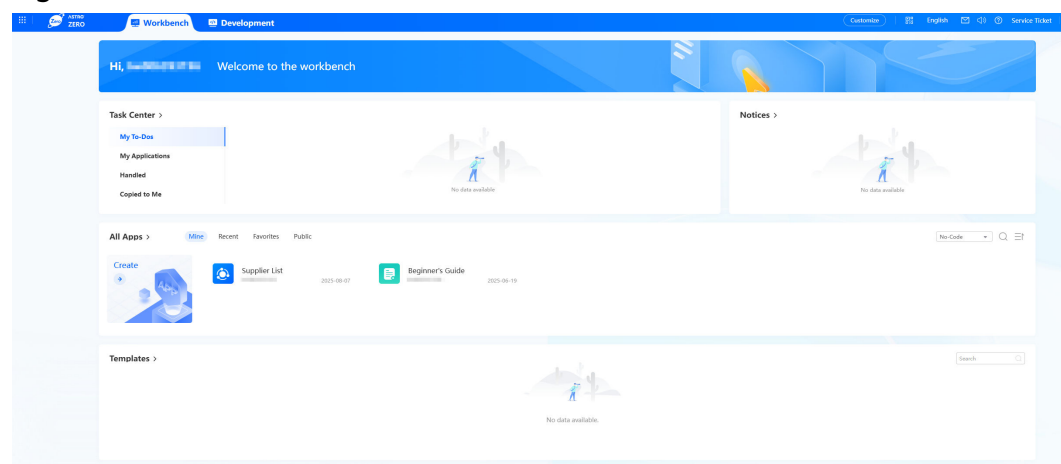
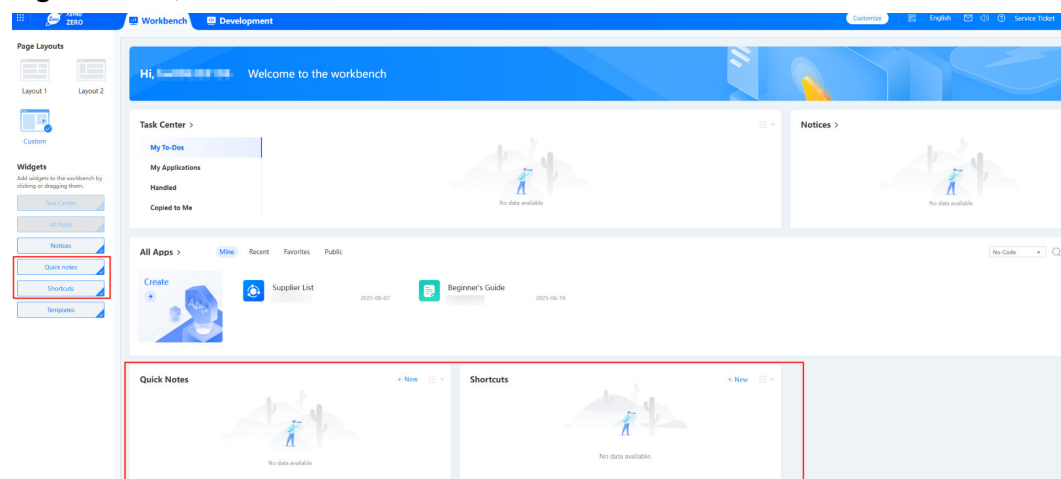





Figure 3-4 Quick notes and shortcuts



The workbench has four modules: one for tasks, one for notices, one for applications, and one for templates. See [Table 3-1](#).

Table 3-1 Workbench introduction

Module	Description
Task center	The task center includes My To-Dos , My Applications , Handled , and Copied to Me .
Notices	A message board. Post, edit, or delete notices, news, and activities.
All Apps	View what you made, last used, starred, or shared with everyone.
Quick Notes	A quick scratchpad for key points and reminders. Each note can be up to 500 characters. This module is hidden by default. Click Customize to show it. See Figure 3-4 .
Shortcuts	Add up to 18 of your most-used pages and views here to skip searching across applications and reach them with one click. This module is hidden by default. Click Customize to show it. See Figure 3-4 .
Top-right toolbar	<ul style="list-style-type: none">• Customize: Click to change the layout and pick the widgets you want on your workbench.• English: System language.• : Check system messages.• : Check upgrade notices.• : Check the help document.• Service Ticket: Create and check service tickets.• Username: shows who is logged in. Click it to see the system version or sign out.

----End

Logging In to the No-Code Workbench on Mobile Devices

You can create and share no-code applications on WeLink (blue version) and WeCom. The following uses WeLink (blue version) to show how to log in to the no-code workbench.

Step 1 (Optional) Register a WeLink account.

If you already have a WeLink account, skip this step. This step uses a WeLink account registered in the Huawei Cloud Astro Zero environment as an example.

1. Go to the [Huawei Cloud Astro Zero console](#).


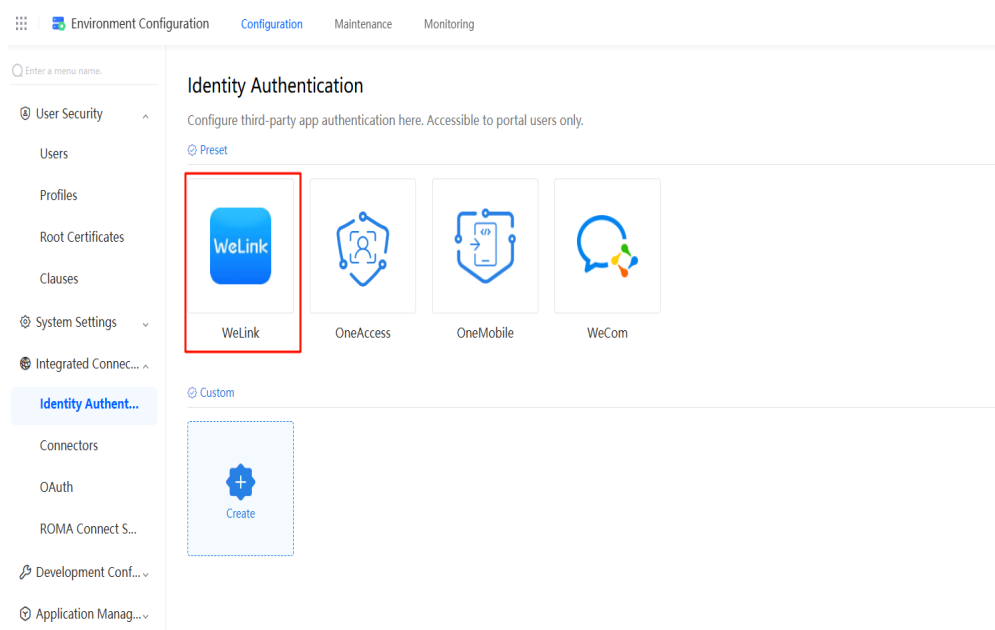
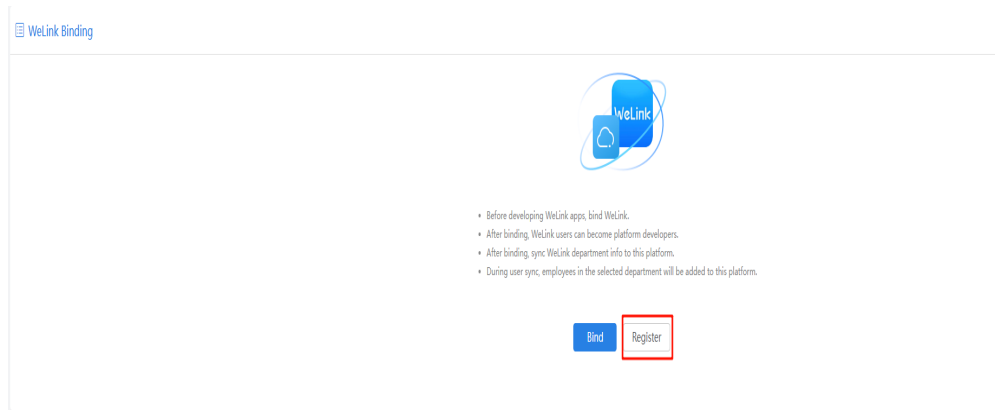
2. On the instance page, click **Access Homepage**. The application development page is displayed.
3. On the top menu bar, click **Workbench**. The no-code workbench is displayed.
4. Click  in the upper left corner of the page and choose **Environments > Environment Configuration**.
5. In the navigation pane, choose **Integrated Connection > Identity Authentication**.
6. On the displayed page, click the WeLink icon. The page for binding WeLink is displayed.

Figure 3-5 Clicking the WeLink icon



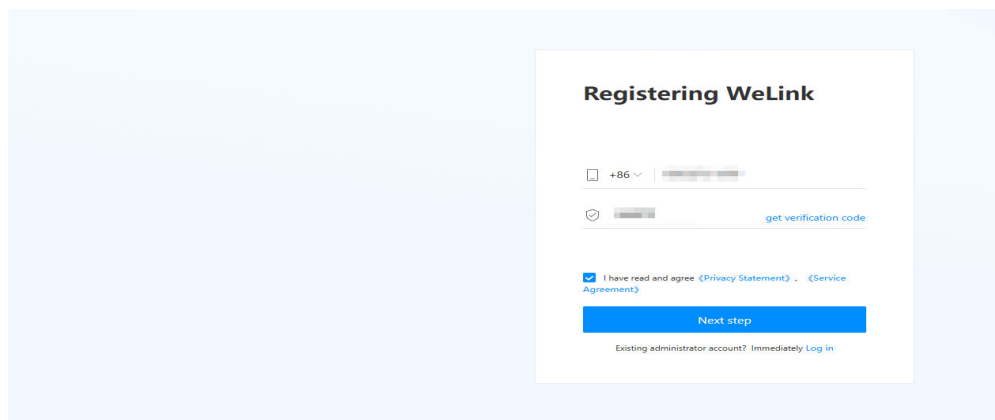
7. Click **Register** to register a WeLink account.

Figure 3-6 WeLink registration page



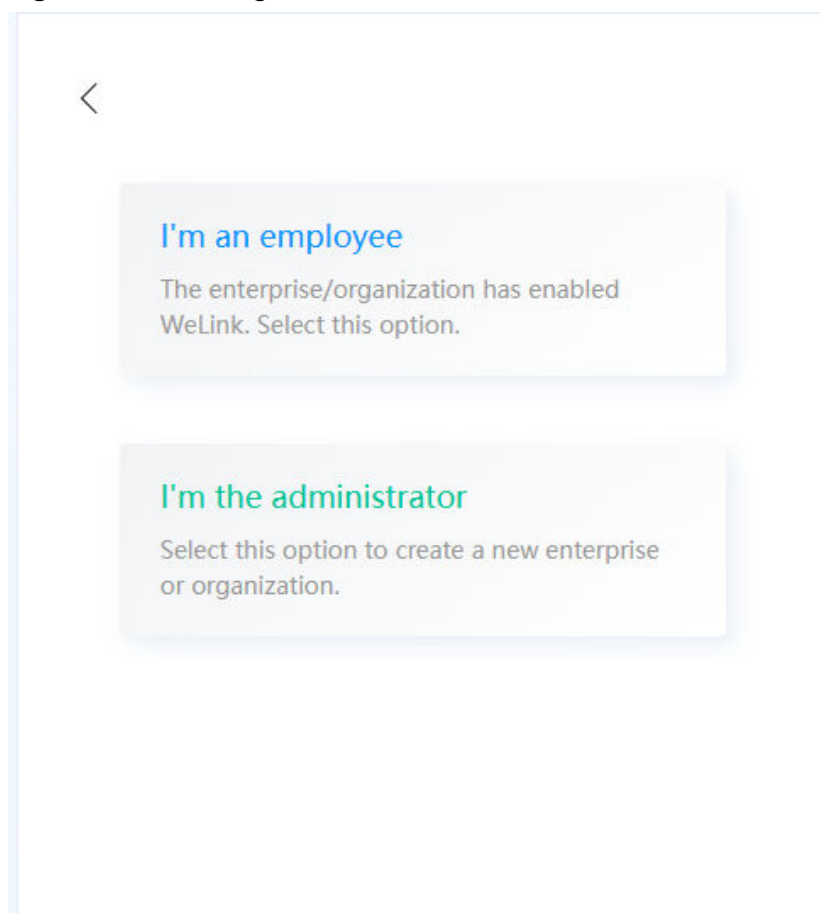
8. Enter your mobile number and the verification code, and click **Next**.

Figure 3-7 WeLink login page



9. Choose a role for the WeLink account. In this example, set the role to administrator.

Figure 3-8 Selecting a role



- If the registered mobile number has been added to an enterprise or organization, **Figure 3-8** is not displayed.
 - In the current version, only WeLink administrators can search for **AppCube** on the PC to access the no-code workbench.
10. On the page for creating enterprises or organizations, set the following parameters and click the create button.

Figure 3-9 Creating an enterprise or organization

< Create Enter/Organ



No-code app on mobile



.com



Computer hardware

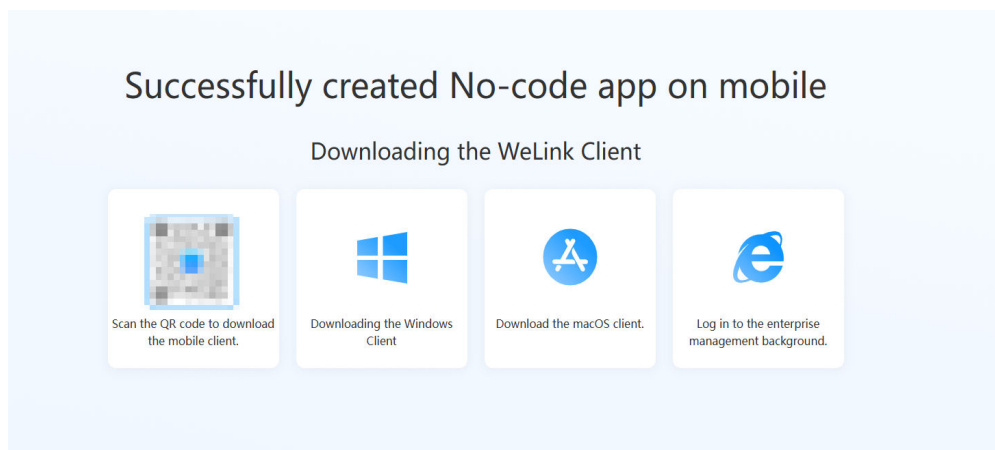


Create

If you click Create, you have read and agreed to it [《Privacy Policy Statement》](#) and [《User Service Agreement》](#)

After a WeLink account is registered, you can log in to the enterprise management background or download the WeLink client to the local PC.

Figure 3-10 Logging in to the enterprise management background or downloading the WeLink client to the local PC



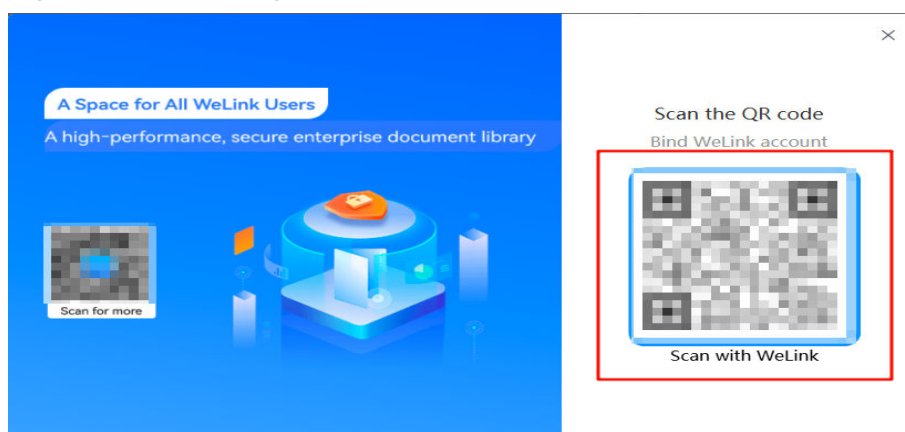
11. (Optional) Download and install the WeLink PC client.

Once installed, Huawei Cloud Astro Zero can bind to WeLink. After that, WeLink administrators can create and manage no-code applications from WeLink.

Step 2 Log in to the development environment as a tenant, bind WeLink, and synchronize WeLink information.

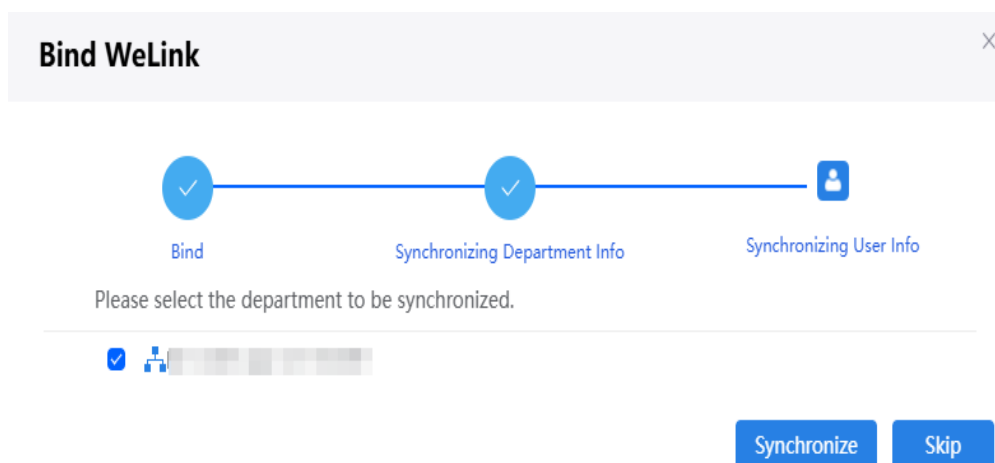
1. In the navigation pane of the environment configuration page, choose **Integrated Connection > Identity Authentication**, and click **WeLink**.
2. In the **WeLink Binding** area, click **Bind**.
3. In the displayed dialog box, open WeLink on the mobile client, click + in the upper right corner, and scan the QR code shown in [Figure 3-11](#).

Figure 3-11 Scanning the QR code



4. Select the WeLink department where the user is located, then click the synchronization button.

Figure 3-12 Synchronizing user information



After you scan the QR code for authentication, Huawei Cloud Astro Zero is automatically bound to WeLink. WeLink users are added as portal users. The number of users is not counted in the license until they log in to the current Huawei Cloud Astro Zero environment. You can view the WeLink user information in the **Configuration Center > Organizations & Users > Users**.

When Huawei Cloud Astro Zero is bound to WeLink, the bound WeLink user is added as a developer and portal user.

Step 3 Give the no-code developer permission to the WeLink user.

This lets the user log in to WeLink to develop and publish no-code applications.


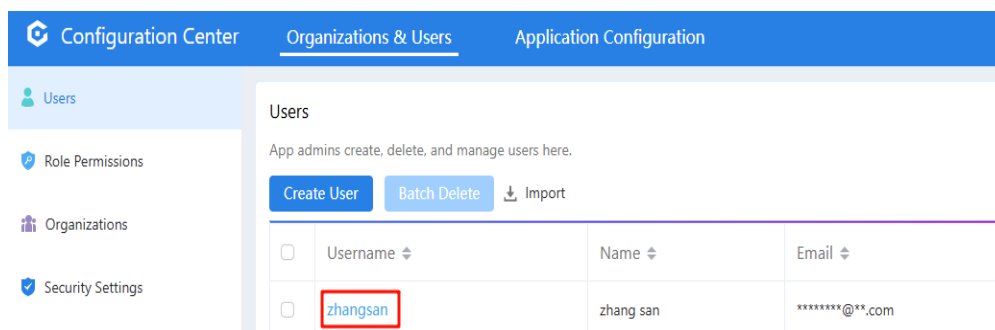
1. Return to the no-code workbench, click  in the upper left corner of the page, and choose **Environments** > **Configuration Center**.
2. In the navigation pane, choose **Users**.
You can view the added users.
3. Click the username. The user details page is displayed.

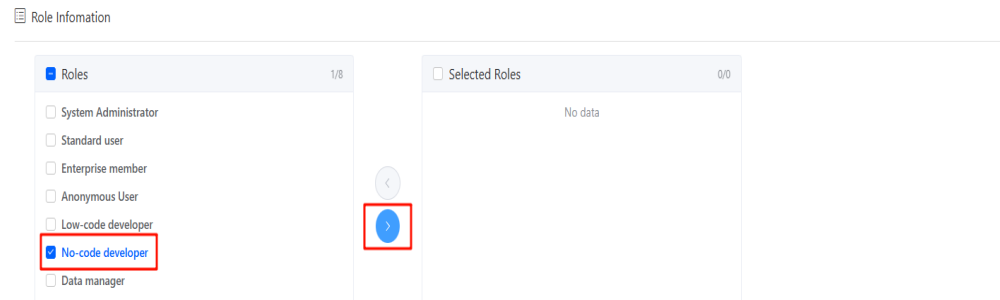
Figure 3-13 Clicking a username



4. In the **Role Information** area, click **Edit**. Choose **No-code developer** under **Roles**, click , and click **Save**.

After adding the developer permission, the user can log in to WeLink to develop and release no-code applications.

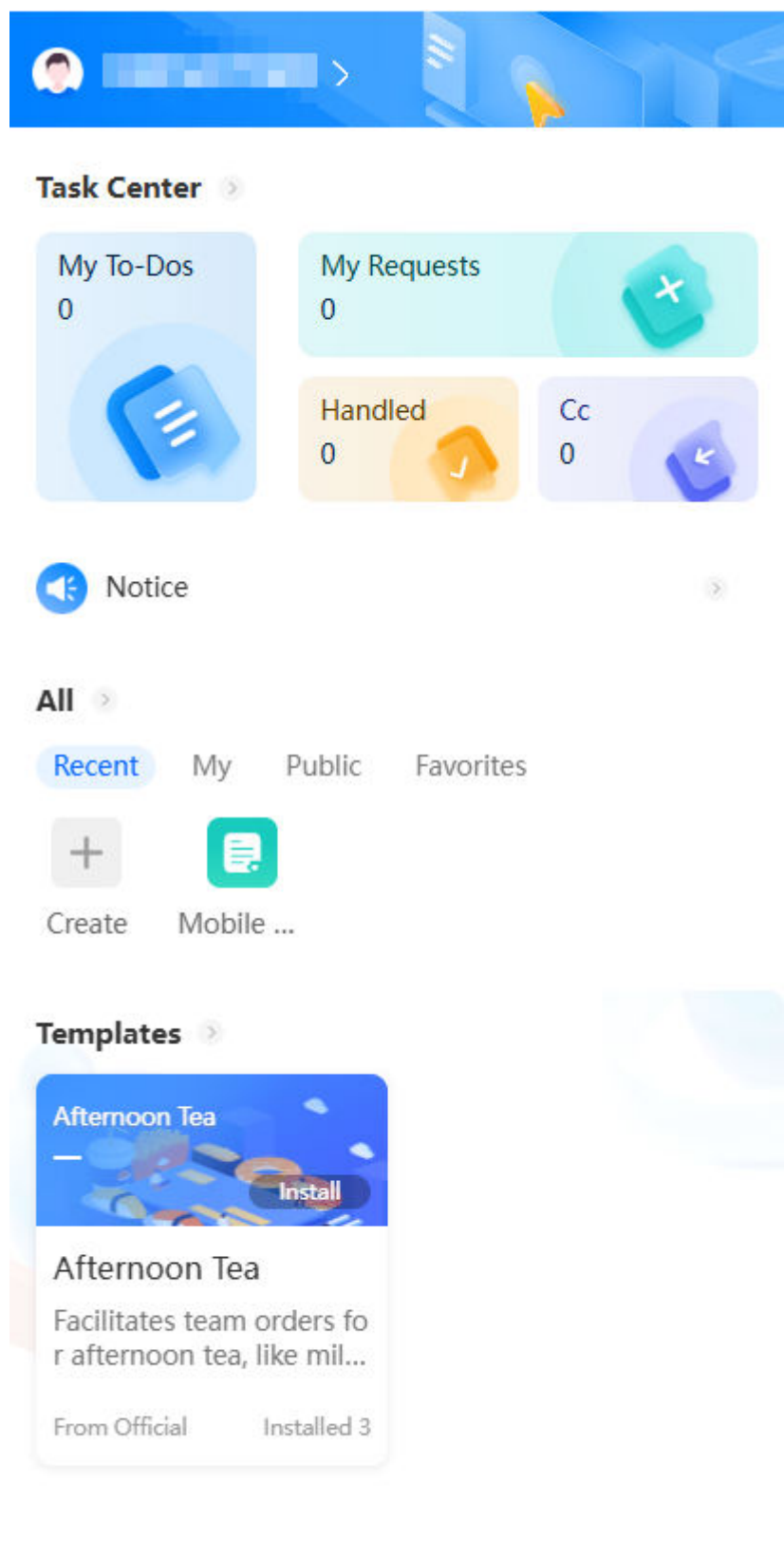
Figure 3-14 Giving the no-code developer permission to a user



Step 4 On WeLink, enter **AppCube** and tap the search result.

Step 5 On the displayed page, tap the button to access the no-code workbench.

Figure 3-15 Huawei Cloud Astro Zero no-code workbench for mobile devices



----End

FAQs

When I log in to the no-code workbench on the phone, I click **Skip** for syncing the user information (as shown in [Figure 3-12](#)). How do I sync the user information after binding the WeLink account?

Go to the environment configuration page, choose **Integrated Connection > Identity Authentication**, click **WeLink**, and click **Sync Now** in the **User Synchronization** area. User information will be synchronized.

3.3 Creating No-Code Applications on PCs

On the no-code workbench, you can:

- Create a blank application.
Drag and drop to create an application from scratch.
- Create the same application or clone an application.

Copy any questionnaire with one click, or share your forms so teammates can make the same application.

Only the application structure (such as forms and views) is copied; no data is copied.

Creating a Blank Application

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, click  of **Create** and select **Create Blank App**.


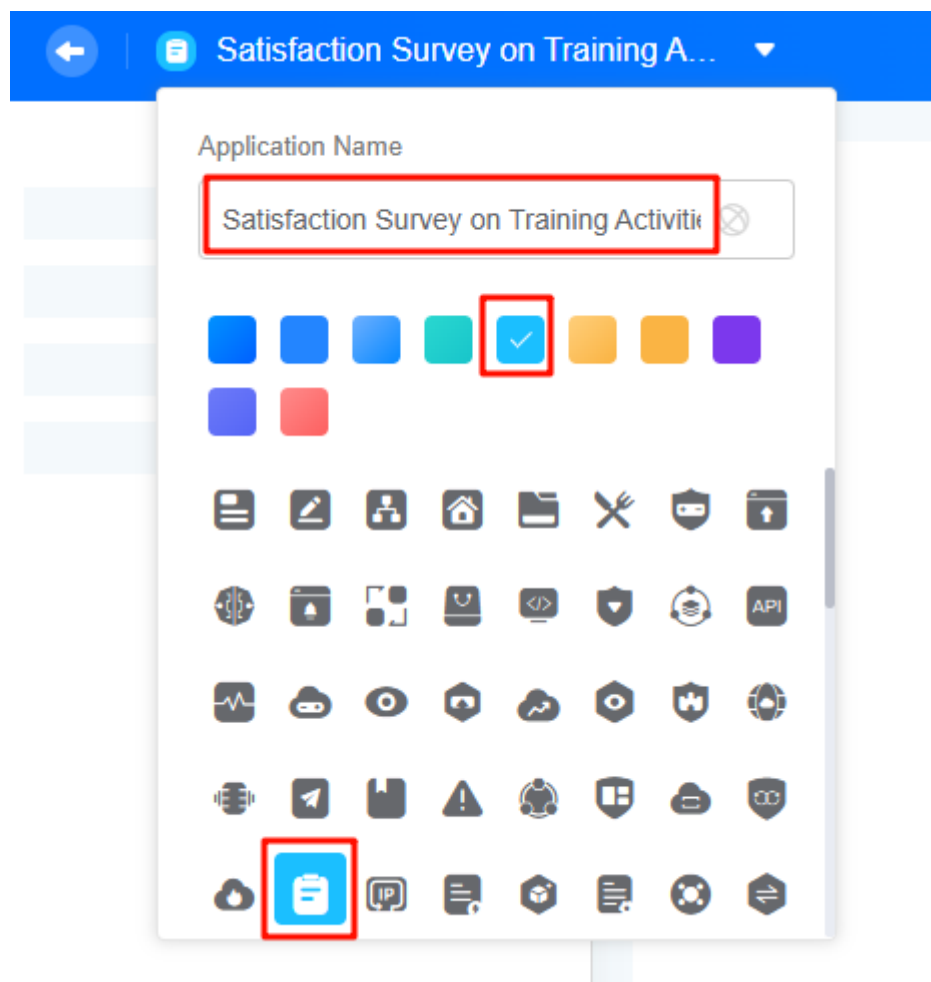
Step 3 Name the application and choose an icon. Click  by the name to add other languages.

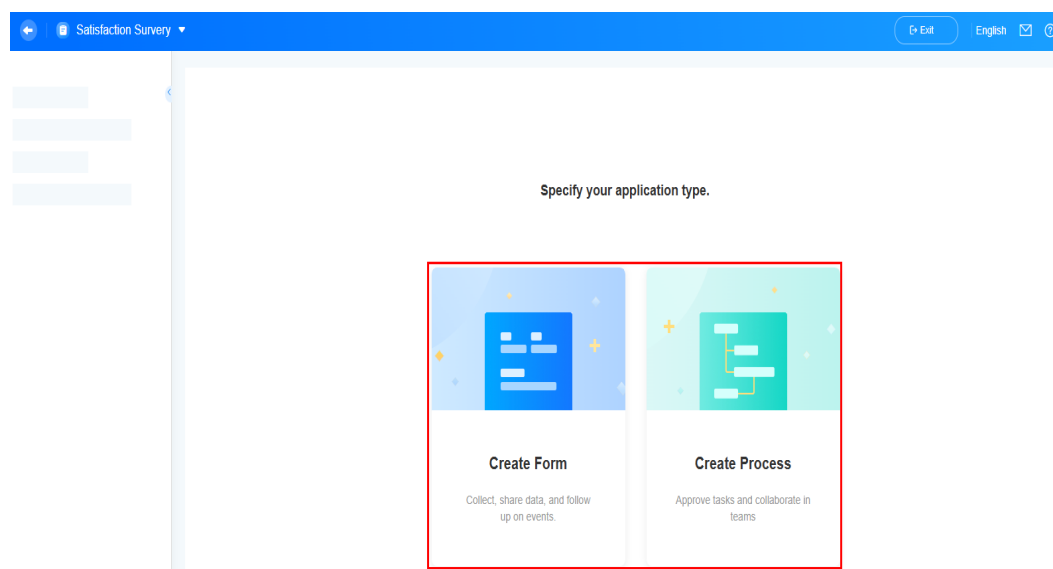
Figure 3-16 Setting the application name and icon



After the application is created, choose **All Apps** > **Mine** to view it.

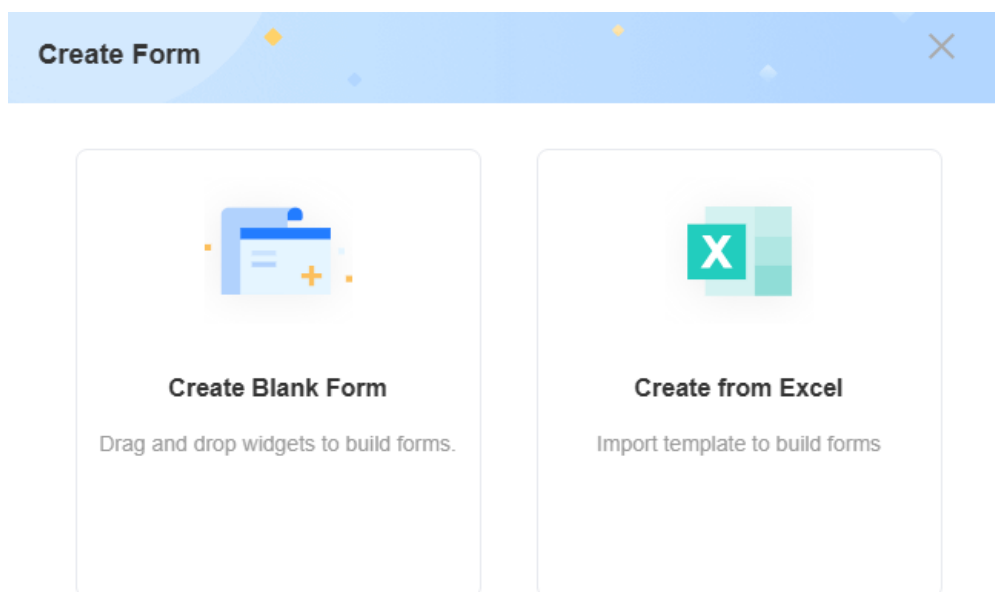
Step 4 Select a form type and add a form for the application.

Figure 3-17 Selecting a form type



- Creating a form: Create a standard form to collect, share, or follow data. For details, see [Creating a Form](#) and [Creating a Form from Excel](#).

Figure 3-18 Creating a standard form



- Creating a process: In scenarios such as applying for business trips or assigning service tickets, different roles need to work together step by step. You can create a process. For details, see [Creating a Process](#).

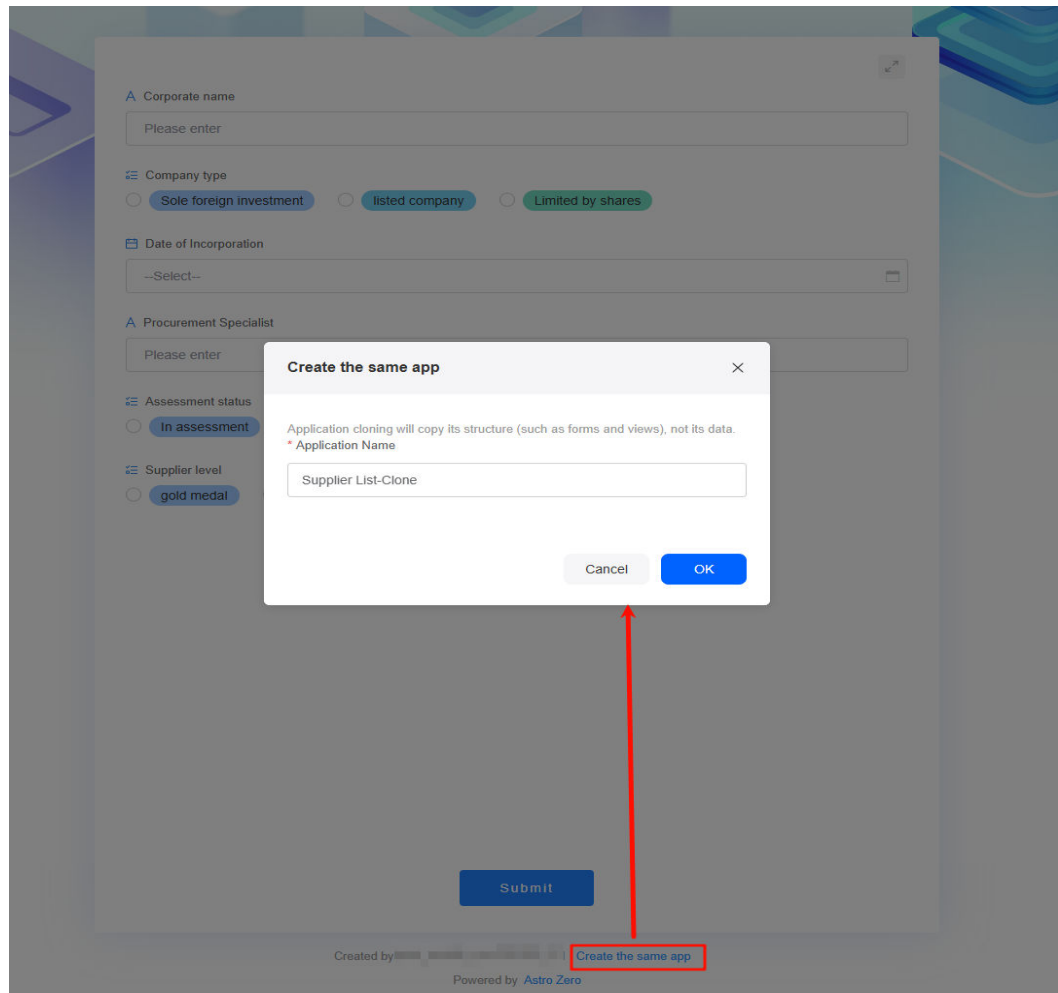
----End

Creating a Same Application

While using someone else's application, you can copy it; your copy is saved under **All Apps > Mine**.

Only the application structure (such as forms and views) is copied; no data is copied.

Figure 3-19 Creating the same application



Cloning an Application

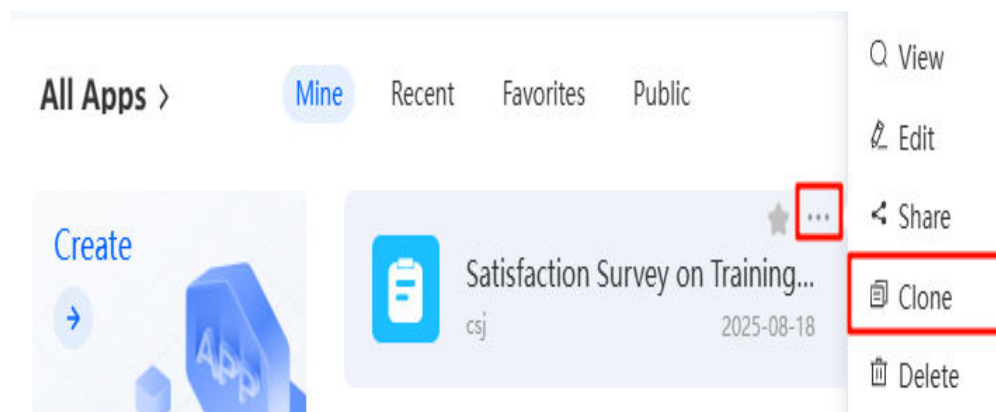
If you are new to no-code or need an application like one that already exists, clone it to save time and effort.

Only the application structure (such as forms and views) is copied; no data is copied.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

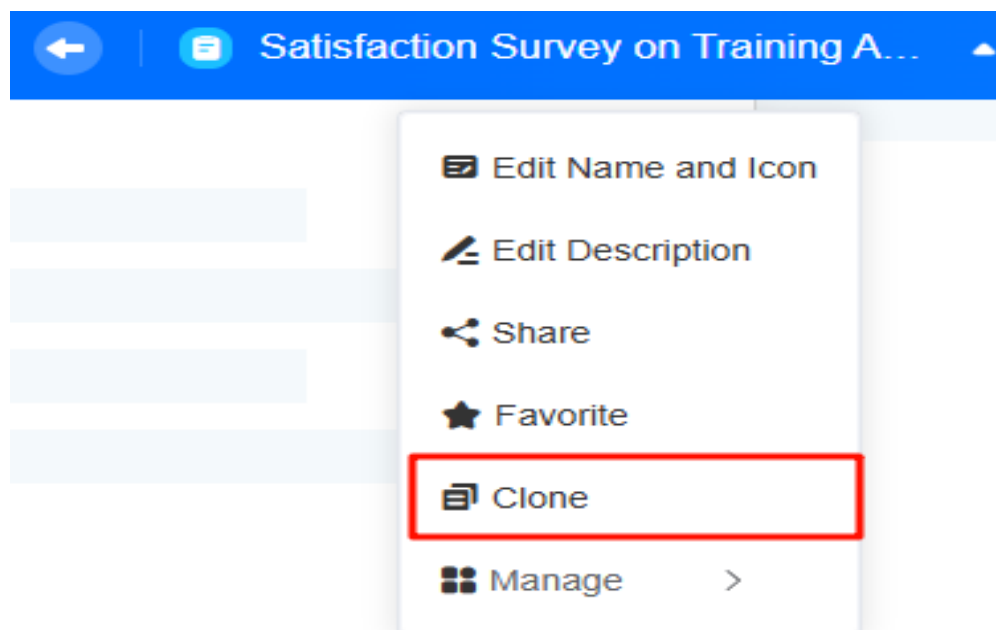
Step 2 In **All Apps**, hover over the target application's ... and choose **Clone**.

Figure 3-20 Cloning an application on the workbench



You can also click the application name in the upper left corner of the application details page and choose **Clone**.

Figure 3-21 Cloning an application on the details page



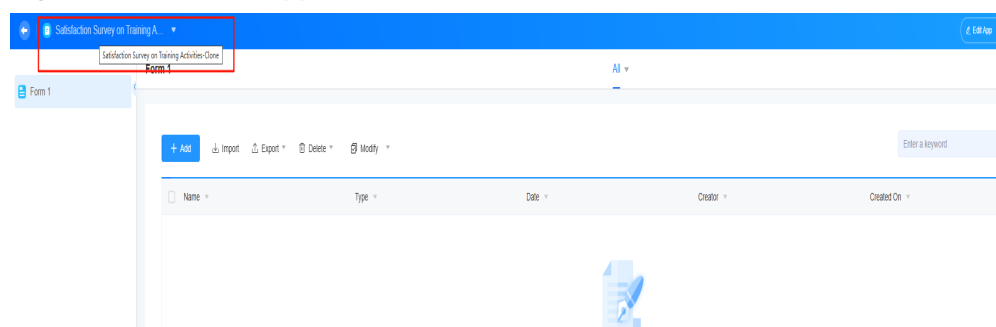
Step 3 Name the new application and click **OK**.

Figure 3-22 Setting an application name

The dialog box has a title bar that says "Clone 'Satisfaction Survey on Training Activities'" with a close button (X) on the right. Below the title bar, there is a message: "Application cloning will copy its structure (such as forms and views), not its data." followed by a red asterisk and the text "* Application Name". Below this is a text input field containing the text "Satisfaction Survey on Training Activities-Clone". At the bottom right of the dialog are two buttons: "Cancel" and "OK".

Step 4 In the displayed dialog box, click **OK** to go to the new application.

Figure 3-23 Cloned application



----End

3.4 Creating No-Code Applications on Mobile Devices

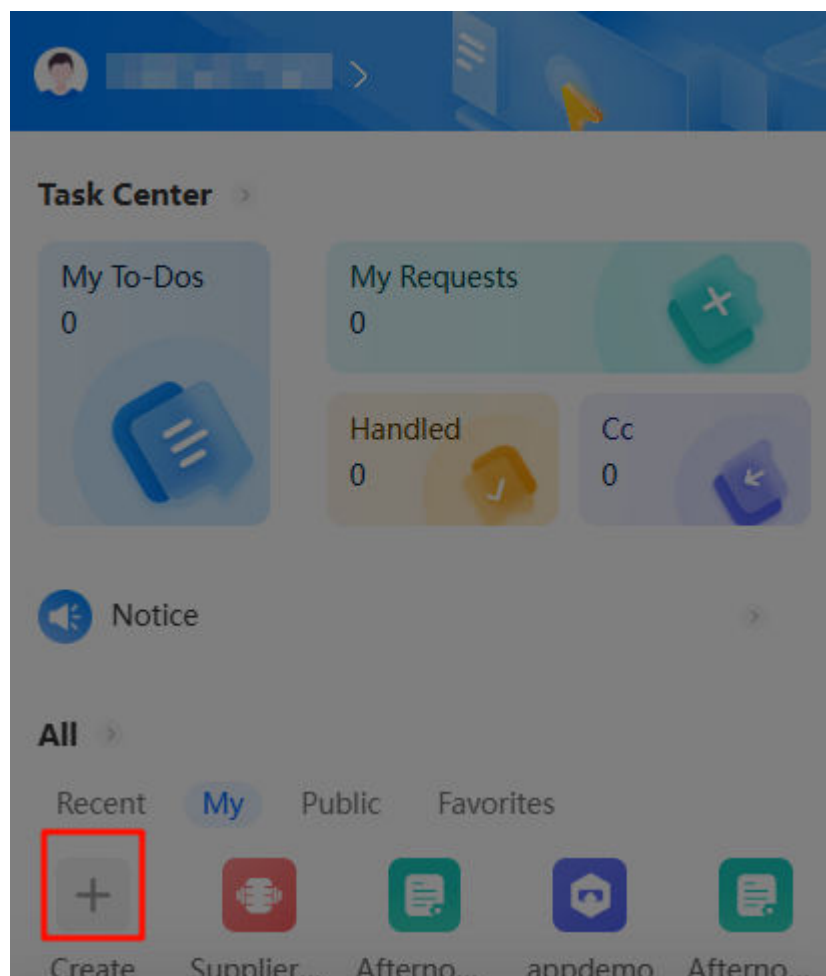
Drag and drop to create an application from scratch.

Creating a Blank Application

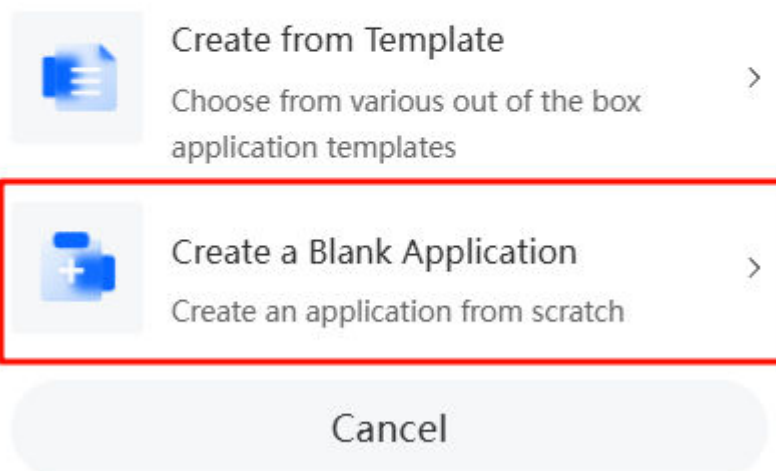
Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In the applications area, tap the button to create a blank application.

Figure 3-24 Creating a blank application



Create



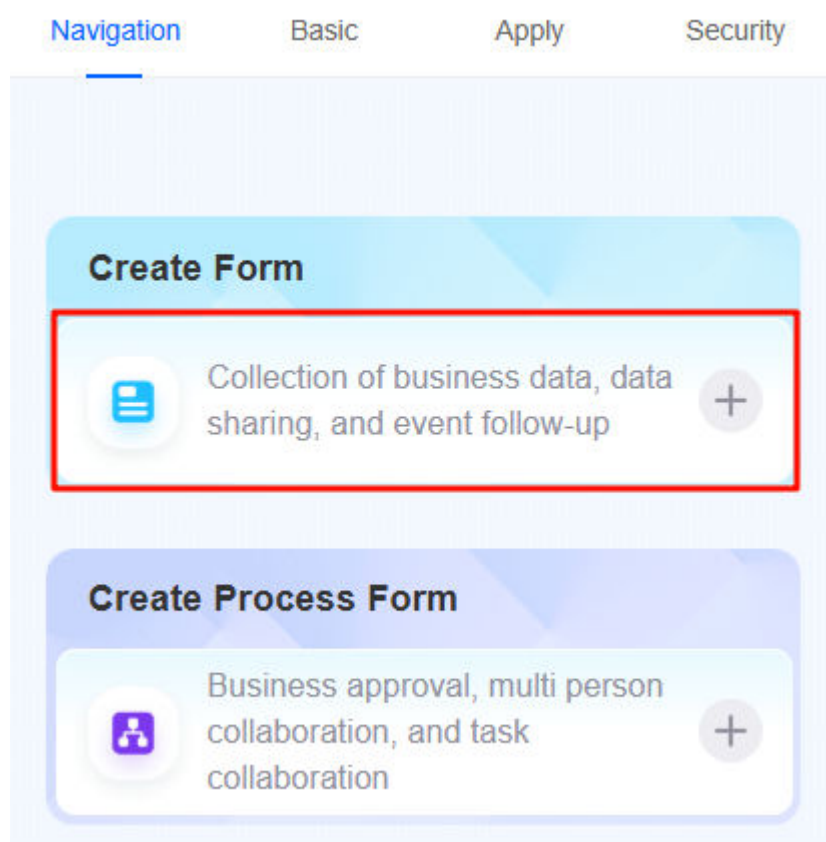
Step 3 On the displayed page, enter an application name and tap the save and edit button.

Step 4 On the navigation settings tab page, tap the button to create a form.

A form is made up of widgets such as text boxes, option buttons, and drop-down lists. It collects user data. You can create multiple forms in an application. Each form is for a data type.

Forms on the no-code workbench gather data for surveys, meeting room bookings, expense claims, meal orders, health check-ins, polls, and other use cases.

Figure 3-25 Creating a form



Step 5 Enter a form name and tap the create button. The page for editing the form is displayed, as shown in [Figure 3-26](#).

Figure 3-26 Form editing page

The screenshot displays the form editing interface. It includes three form fields, each with a configuration menu (three dots):

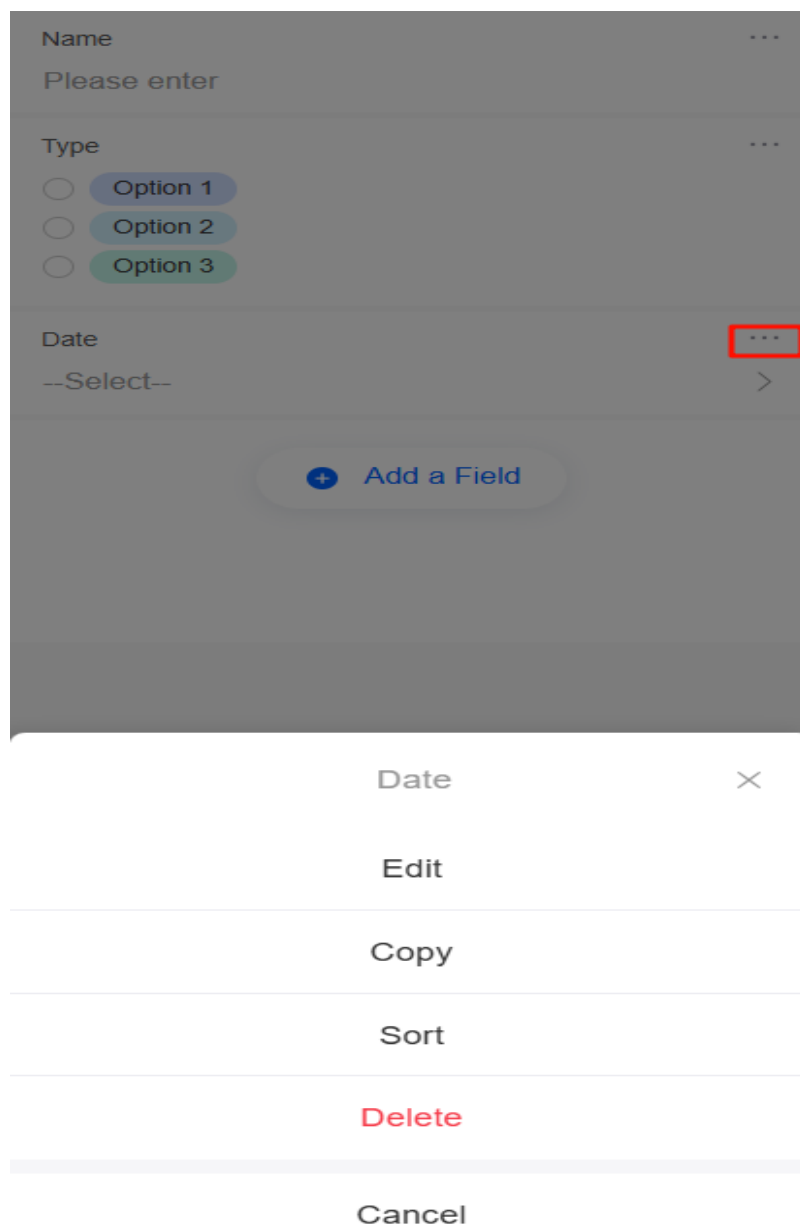
- Name:** A text input field with the placeholder text "Please enter".
- Type:** A radio button group with three options: "Option 1" (selected), "Option 2", and "Option 3".
- Date:** A date picker field showing "--Select--".

Below these fields is a large, empty light gray rectangular area. At the bottom of the page is a prominent blue button labeled "Save".

Step 6 On the form editing page, tap the button to add fields and customize the form based.

Every form widget works the same as on a PC. For details, see [Setting Form Widget Properties](#). After a widget is added, click **...** next to a field to edit, clone, sort, or delete the field.

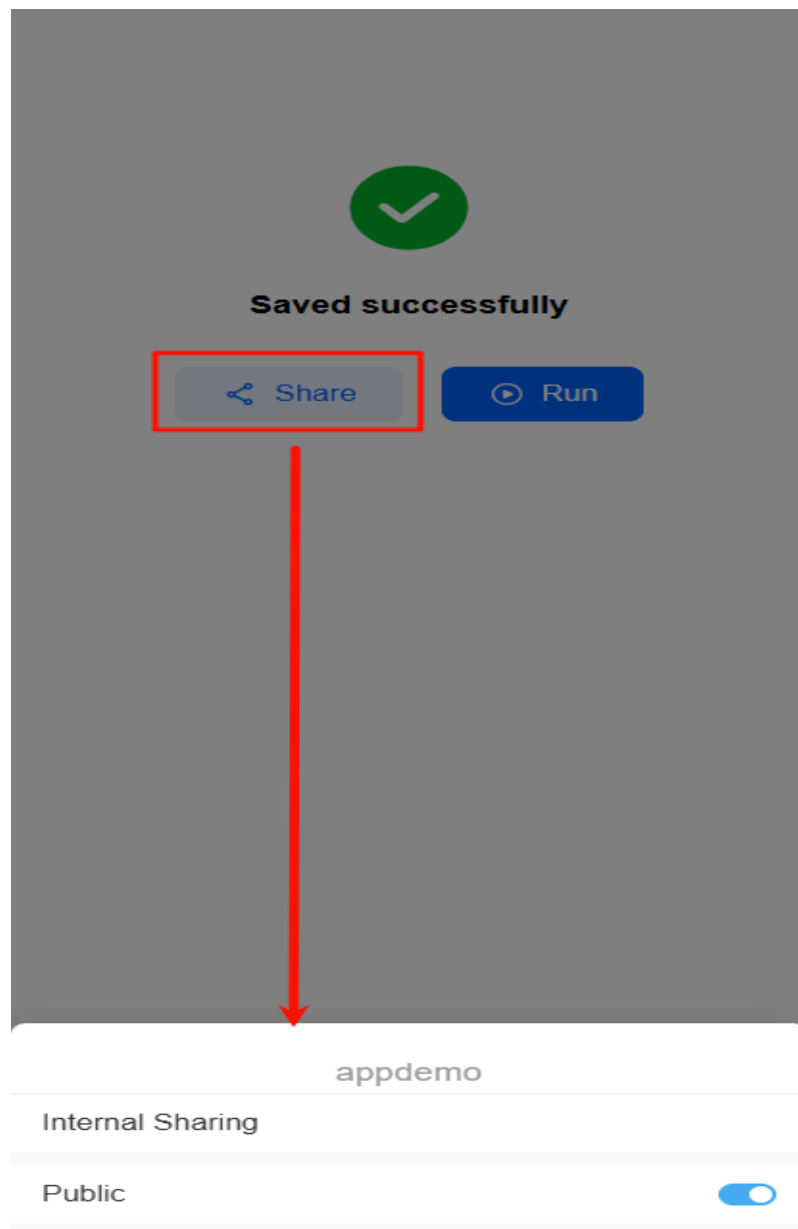
Figure 3-27 Managing fields



Step 7 Tap the save button.

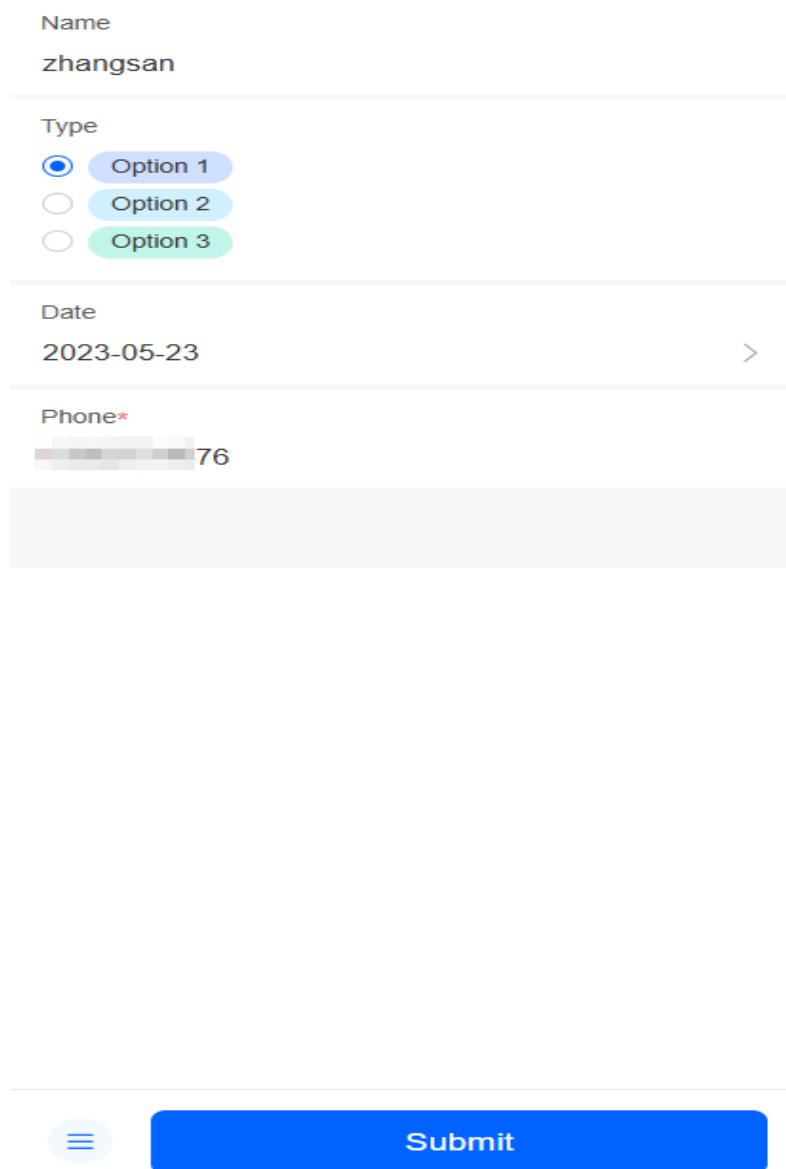
- Sharing the form
On the displayed page, share the form to internal and external users.

Figure 3-28 Sharing the form



- Running a form
On the page indicating that the settings are saved, tap the run button and submit the questionnaire.

Figure 3-29 Submitting the questionnaire



The screenshot shows a questionnaire submission form with the following fields and options:

- Name:** zhangsan
- Type:** Three radio button options: Option 1 (selected), Option 2, and Option 3.
- Date:** 2023-05-23, with a right arrow icon for date selection.
- Phone*:** A masked phone number ending in 76.

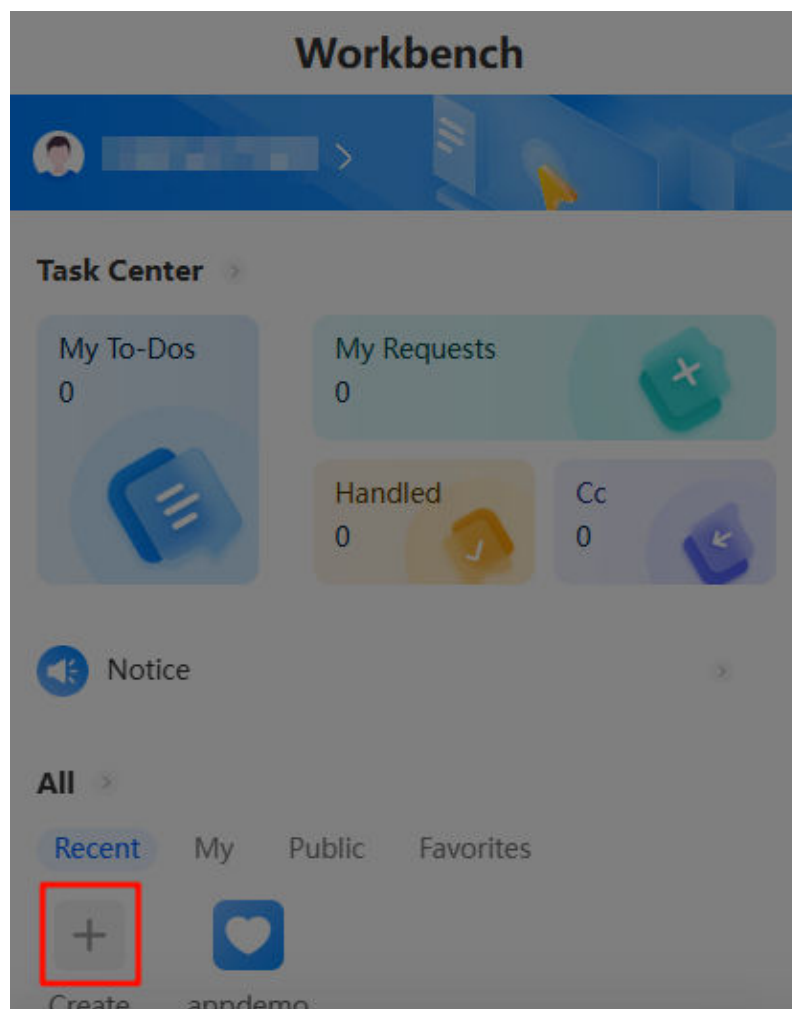
At the bottom of the form, there is a blue **Submit** button and a hamburger menu icon.

----End

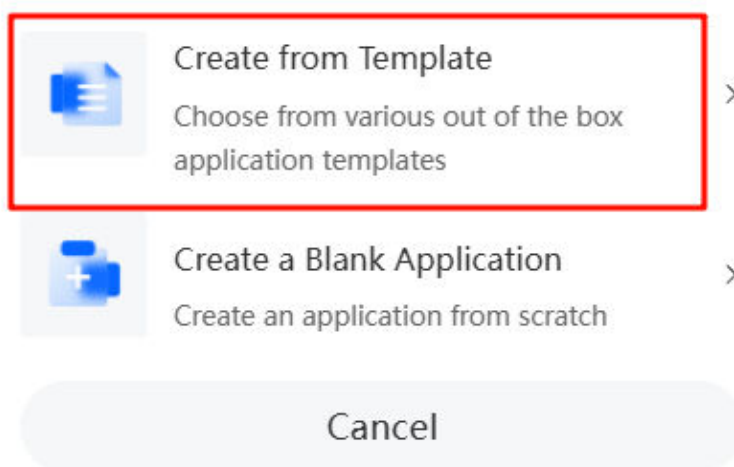
Creating an Application Using a Template

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In the all applications area, tap the create button and choose to create an application from a template.

Figure 3-30 Creating an application from a template



Create

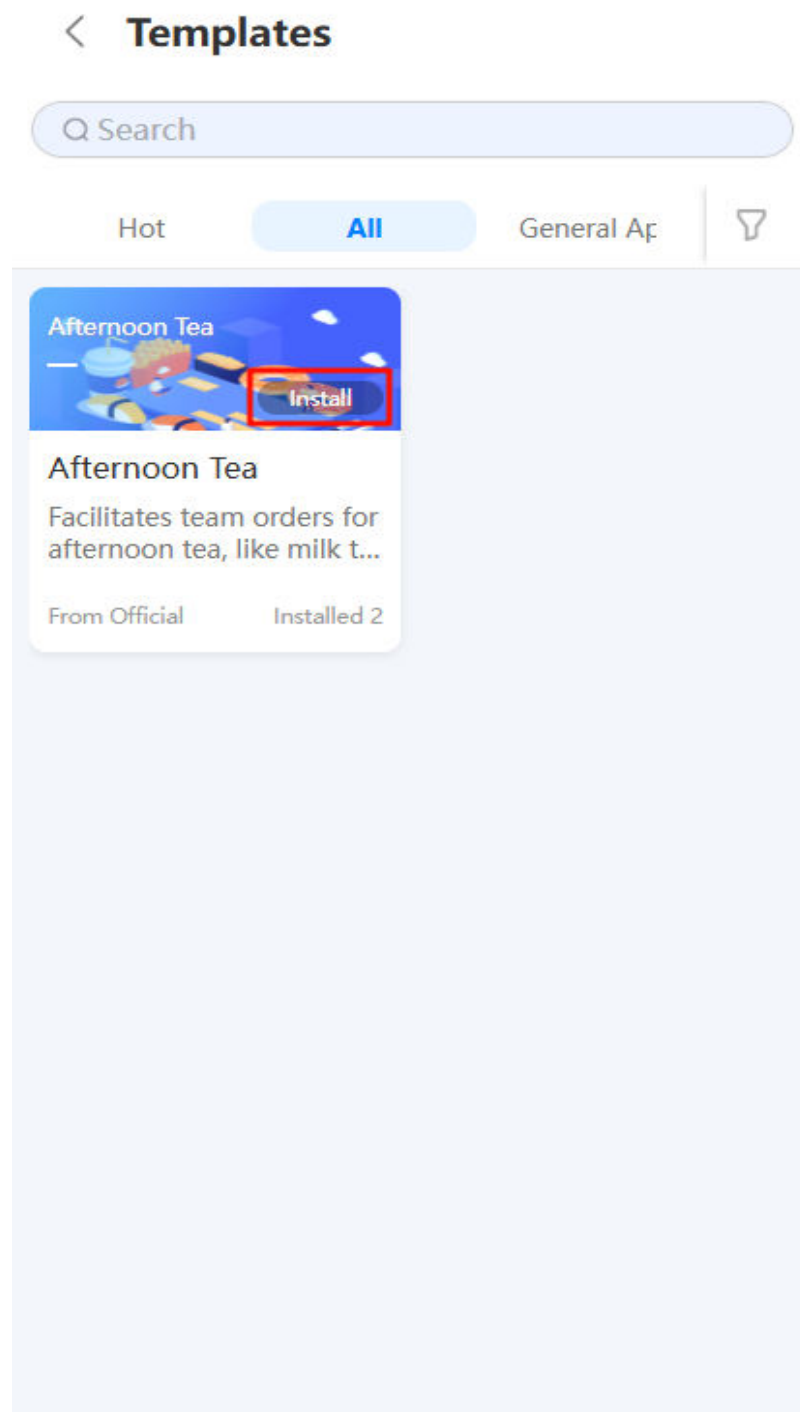


Step 3 On the displayed page, enter an application name and tap the save and edit button.

Step 4 In the template center, tap **Install** on the required template.

Once installed, you can access the template.

Figure 3-31 Installing a template



Step 5 (Optional) Edit an application based on an existing template.


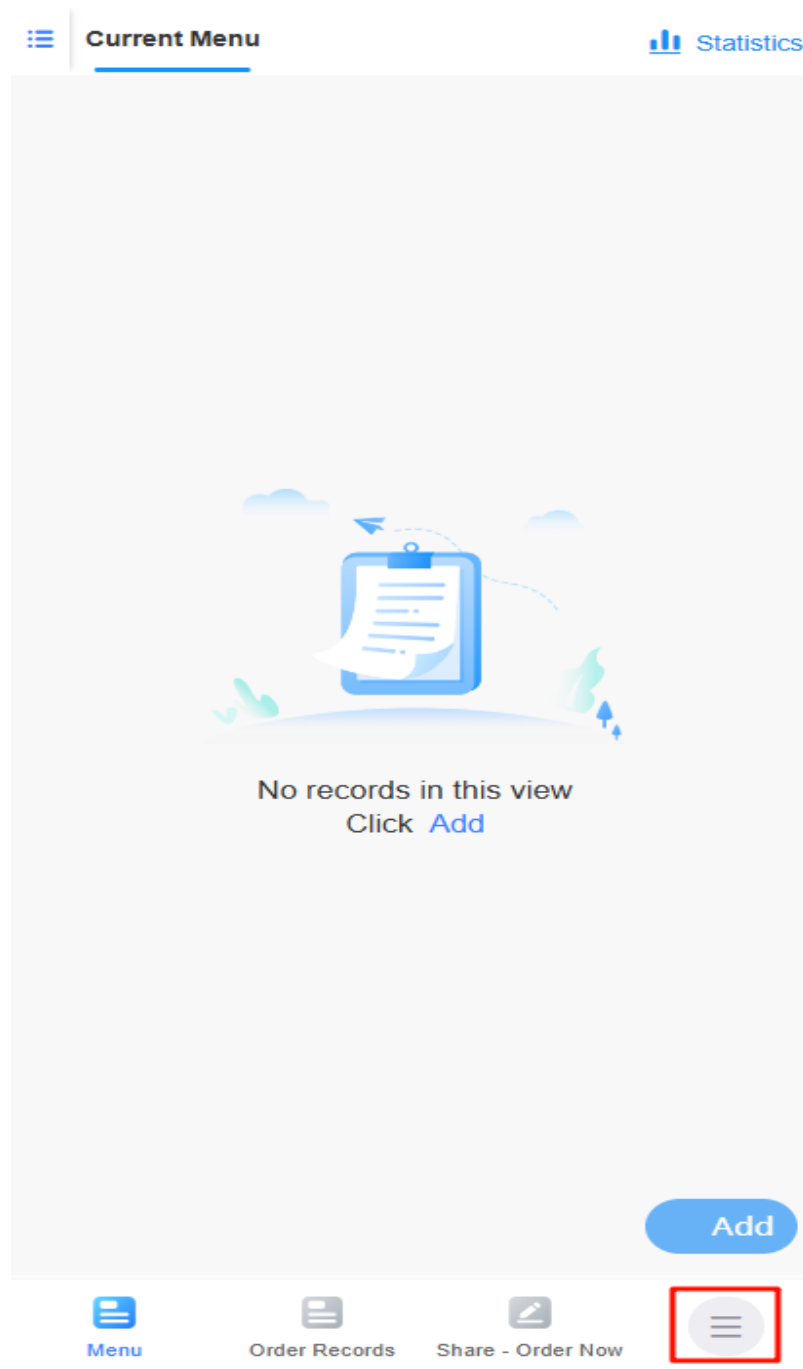
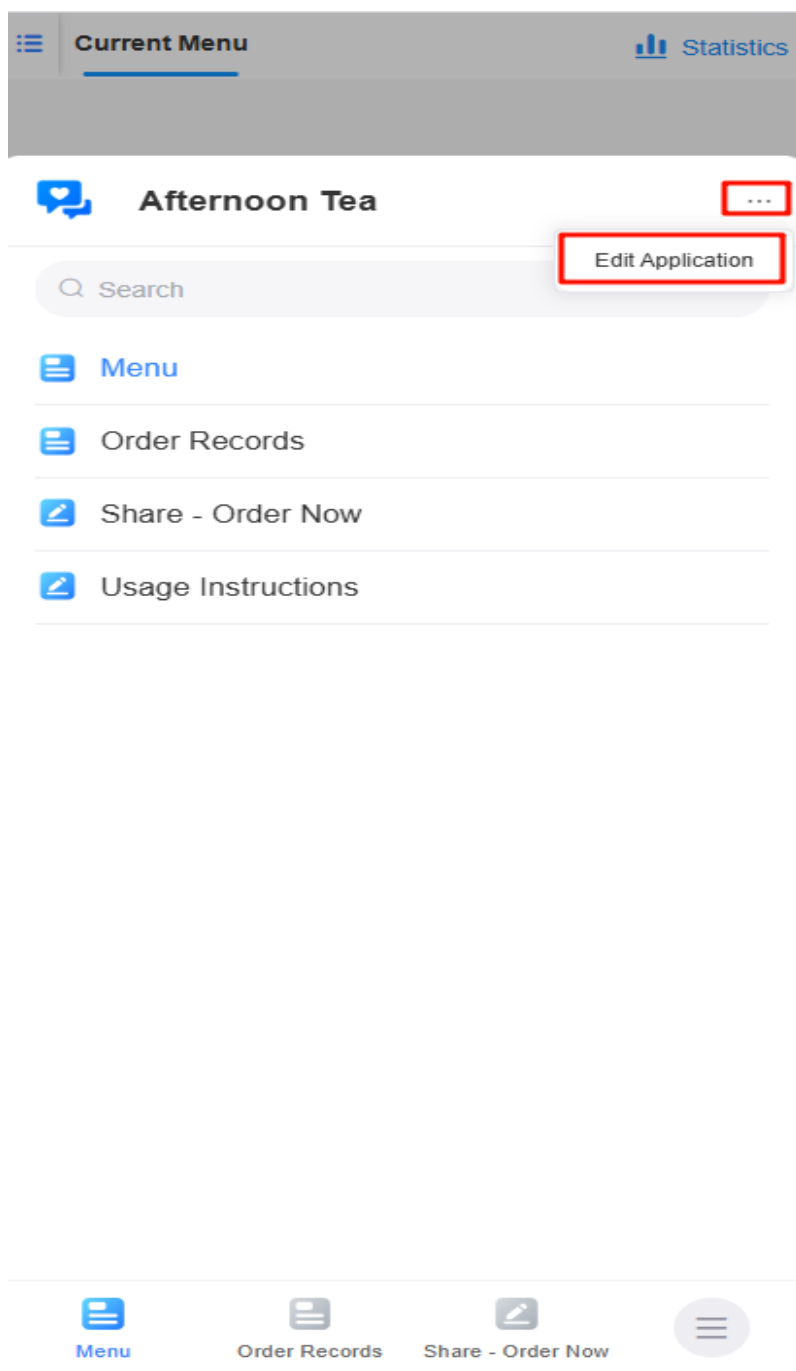
1. Tap  in the lower right corner of the application page.

Figure 3-32 Application details page



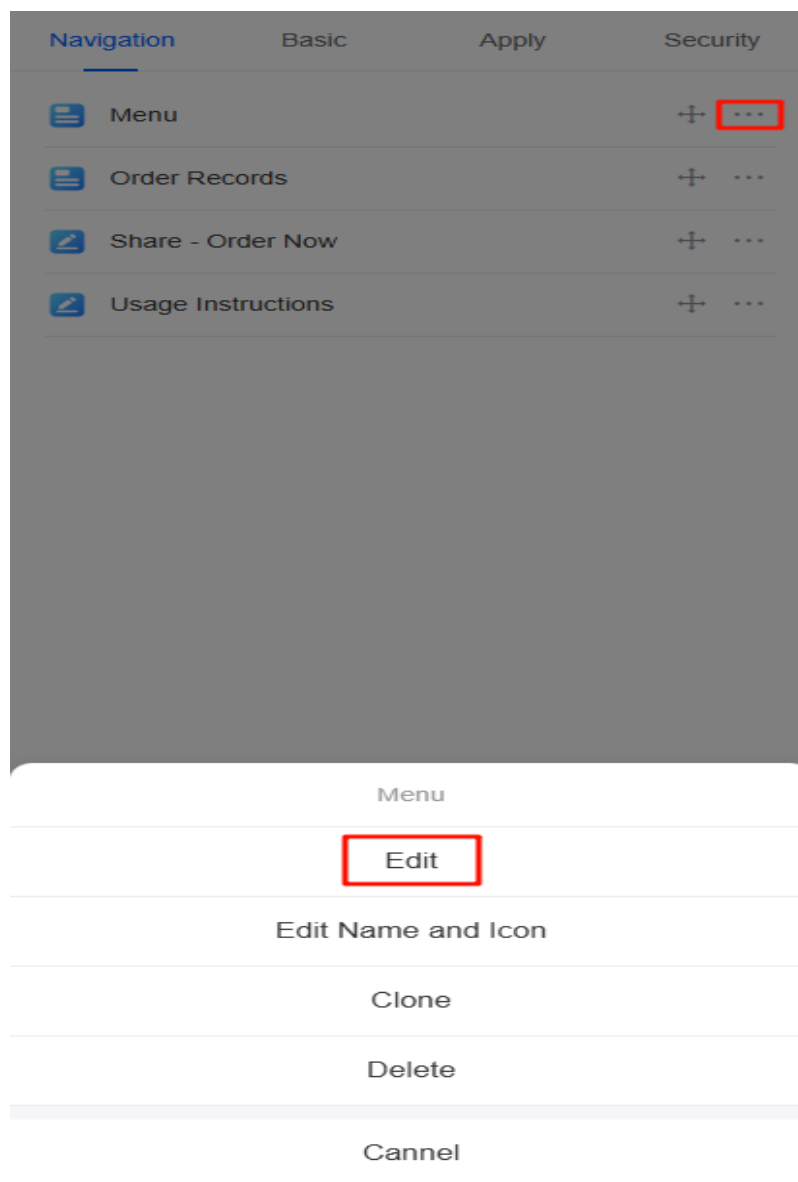
2. On the displayed page, tap  and tap the edit button.

Figure 3-33 Tapping the edit button



3. In the navigation pane, tap *** next to the target form and tap the edit button.

Figure 3-34 Tapping the edit button



4. On the form editing page, make your changes and tap the save button.

Step 6 Share the form.


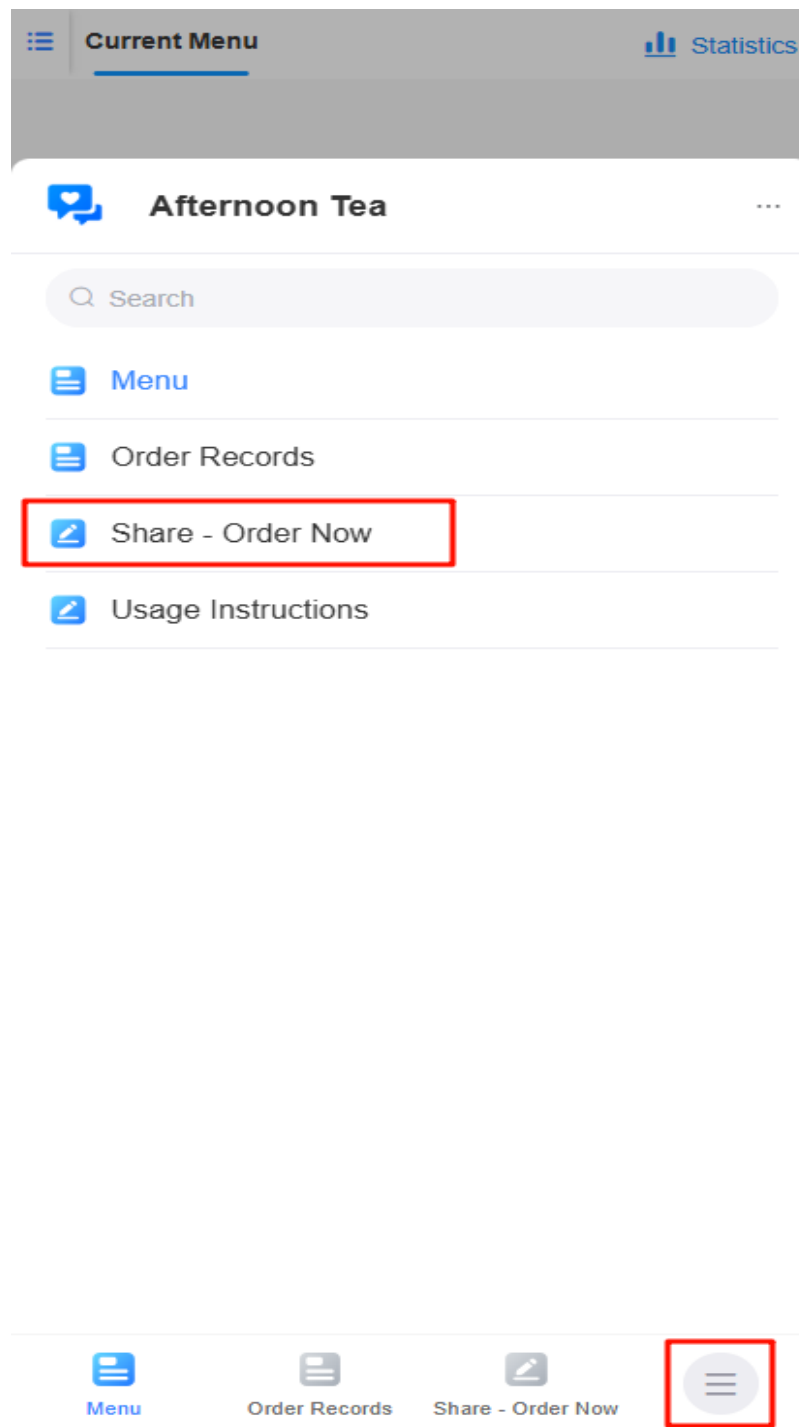
1. In the lower right corner of the application page, tap  and select the corresponding form. The form filling page is displayed.

Figure 3-35 Selecting a form



2. Tap the share icon and share the form to internal users.

Figure 3-36 Tapping the share icon

Order Now

Customer*

X

>

Date*

2025-08-19

>

Order*

Please select

>

Category

Price

0

Supplier

Remarks

Please enter

Submit

Figure 3-37 Selecting a sharing mode

The screenshot shows a mobile application interface for an 'Order Now' form. The form has several fields: 'Customer*' with a selection bar and a close button, 'Date*' with the value '2025-08-19', 'Order*' with the placeholder 'Please select', 'Category', 'Price' with the value '0', 'Supplier', and 'Remarks' with the placeholder 'Please enter'. Below the form is a modal dialog titled 'Share - Order Now' containing two buttons: 'Share' (highlighted with a red rectangle) and 'Cancel'.

----End

3.5 Managing No-Code Applications on PCs

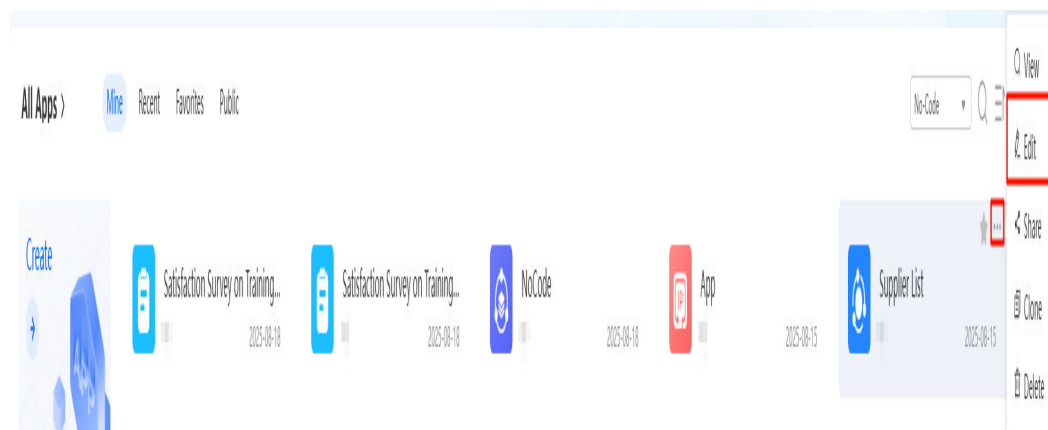
Modifying an Application

You can modify an application as required.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

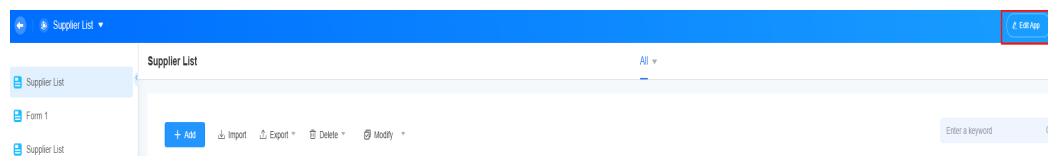
Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Figure 3-38 Editing an application on the workbench



You can also click the target application to open its details page, then click **Edit App** in the upper right corner to access the editing page.

Figure 3-39 Editing an application on its details page



----End

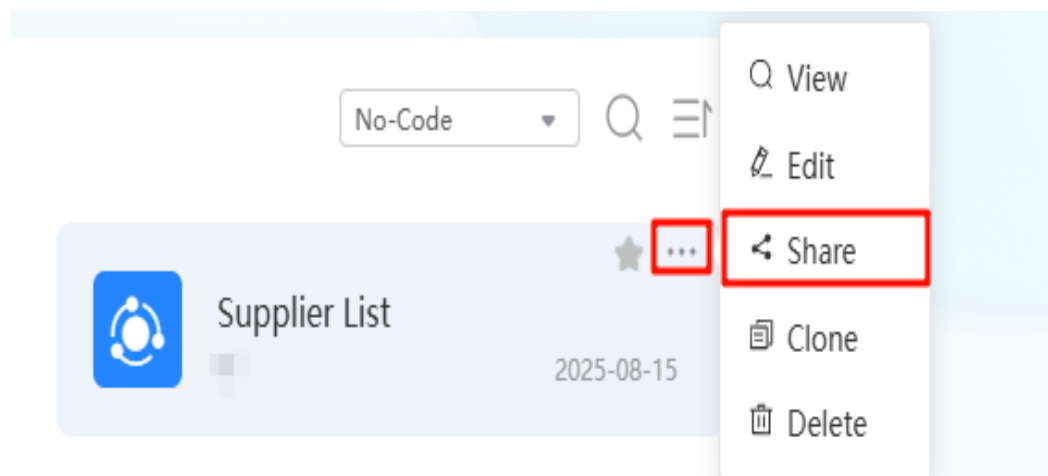
Sharing an Application

You can share an application with other portal users.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

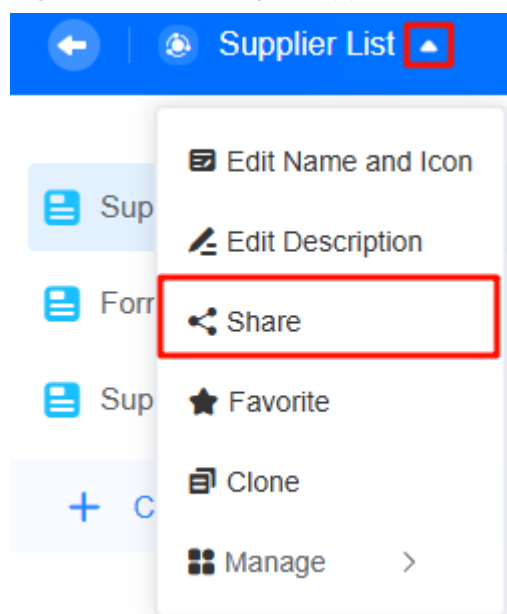
Step 2 In **All Apps**, hover over the target application's ... and choose **Share**.

Figure 3-40 Sharing an application on the workbench



You can also click the application name in the upper left corner of the application details page and choose **Share**.

Figure 3-41 Sharing an application on its details page



Step 3 Click  of the link to share the application with other users.


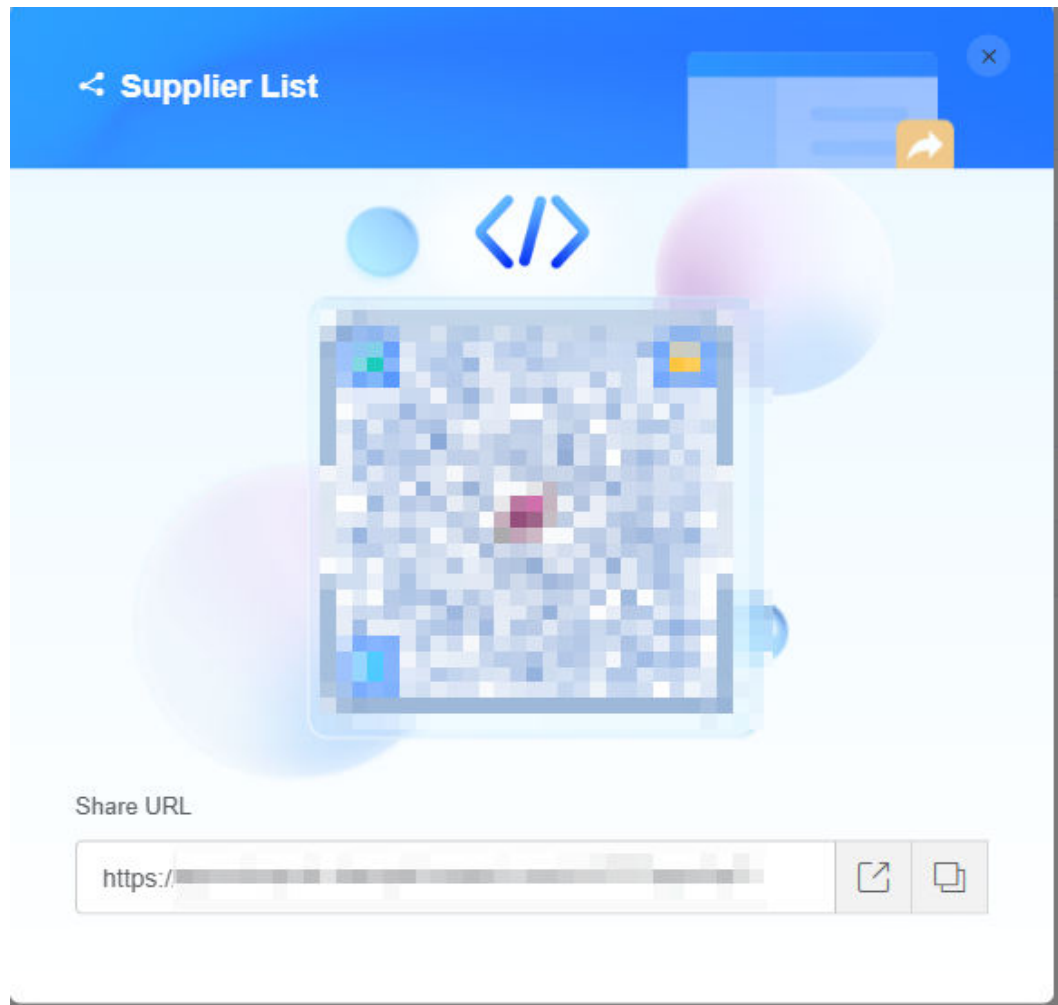
Click  to open the application in a new window, or share its QR code so WeLink users can scan and access it.

Figure 3-42 Obtaining the link for sharing



----End

Favoriting an Application

You can add an application to **Favorites**.


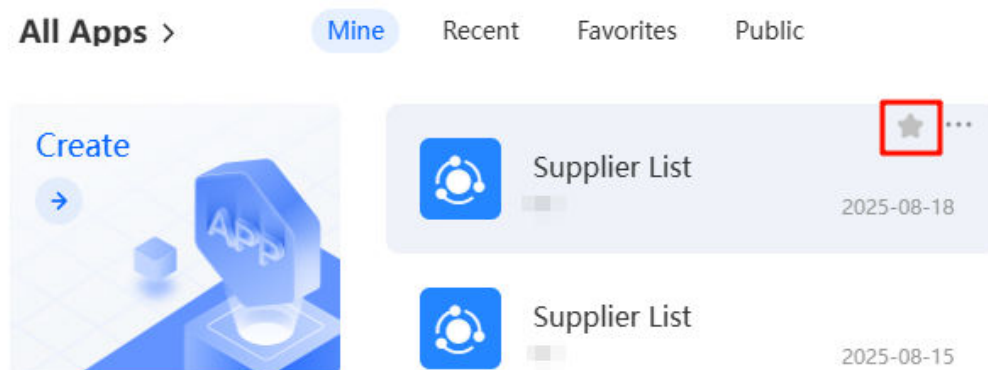
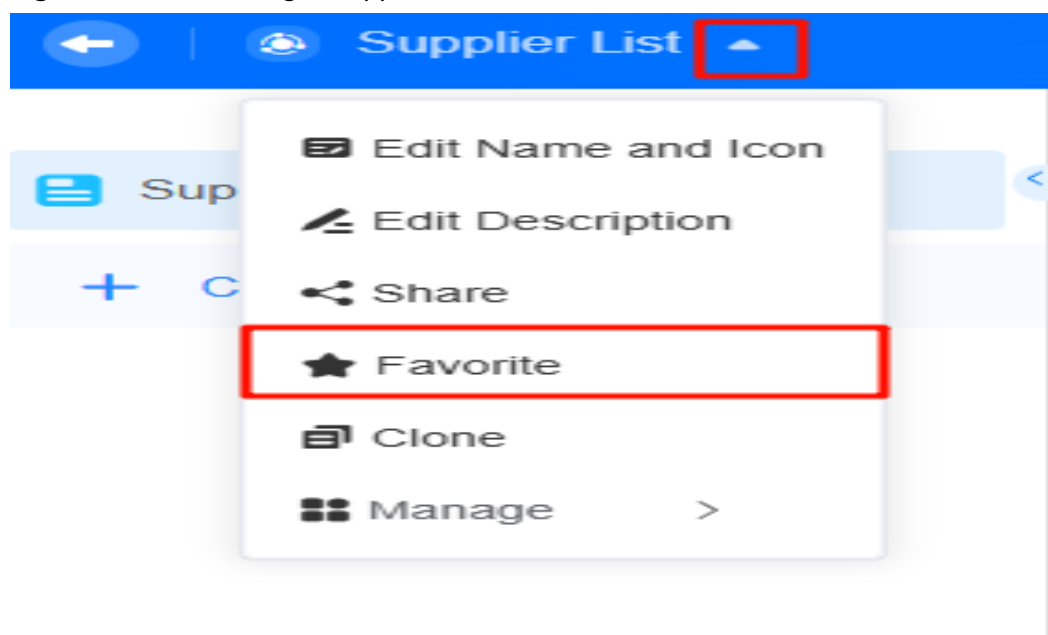
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application and click  to favorite it.

Figure 3-43 Favoriting an application on the workbench



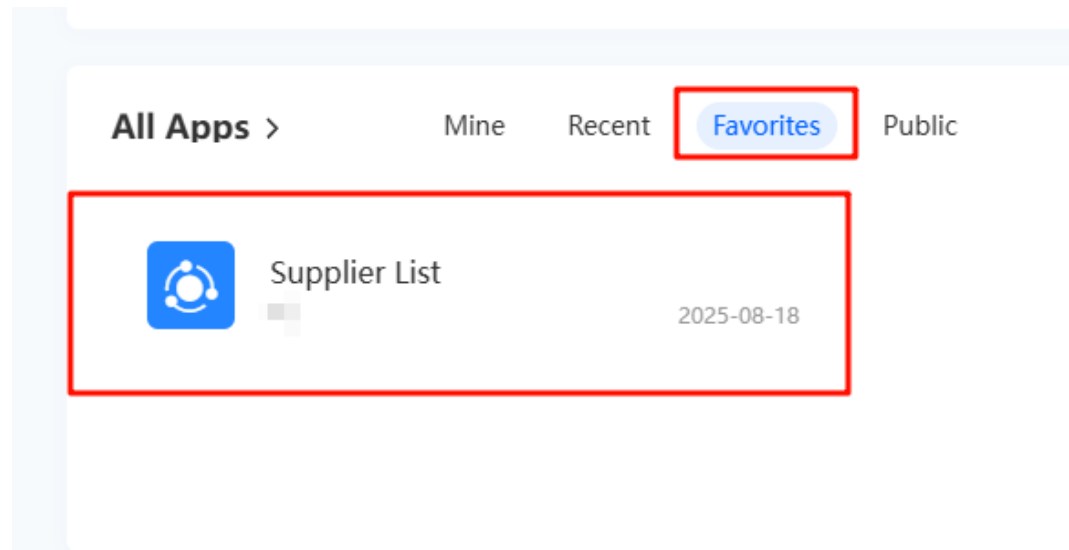
You can also click the application name in the upper left corner of the application details page and choose **Favorite**.

Figure 3-44 Favoriting an application



Step 3 Choose **All Apps > Favorites** to view your favorite applications.

Figure 3-45 Viewing favorite applications



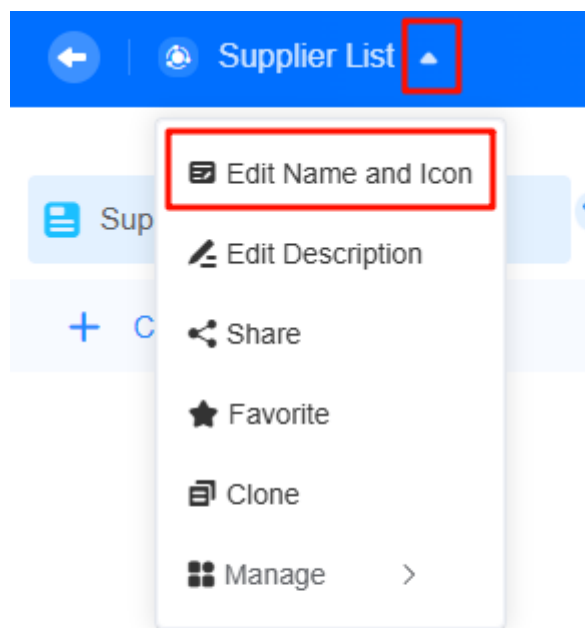
----End

Modifying an Application Name and Icon

You can modify the name and icon of an application.

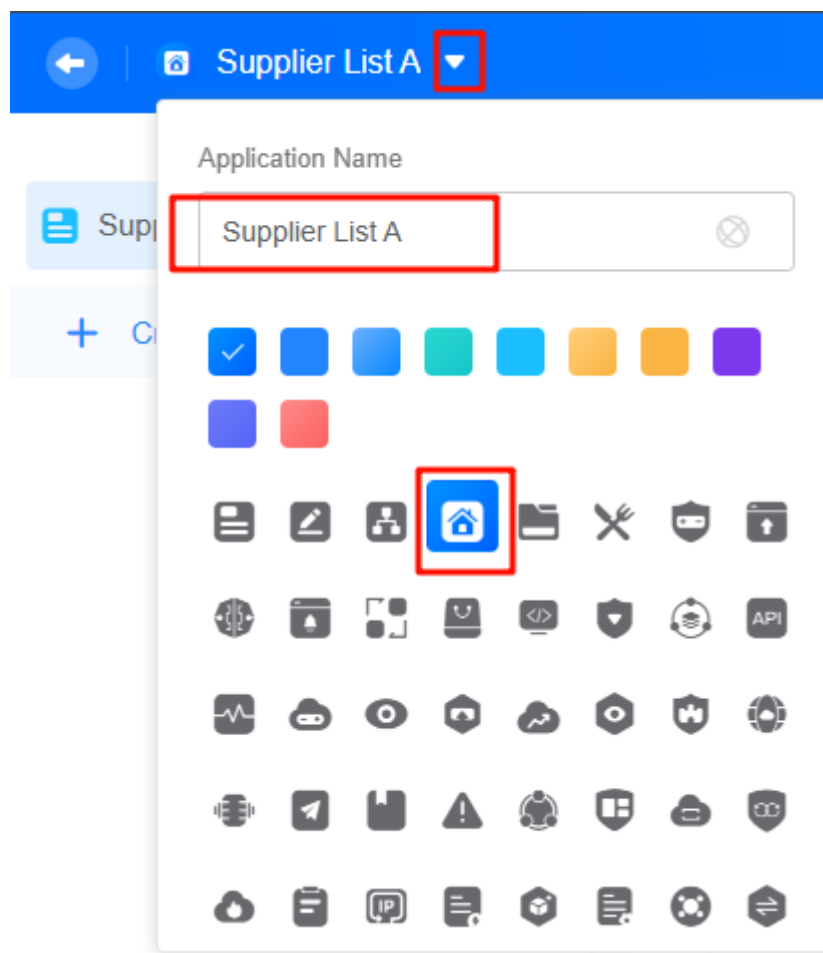
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** In the upper left corner of the page, click the application name and choose **Edit Name and Icon**.

Figure 3-46 Selecting Edit Name and Icon



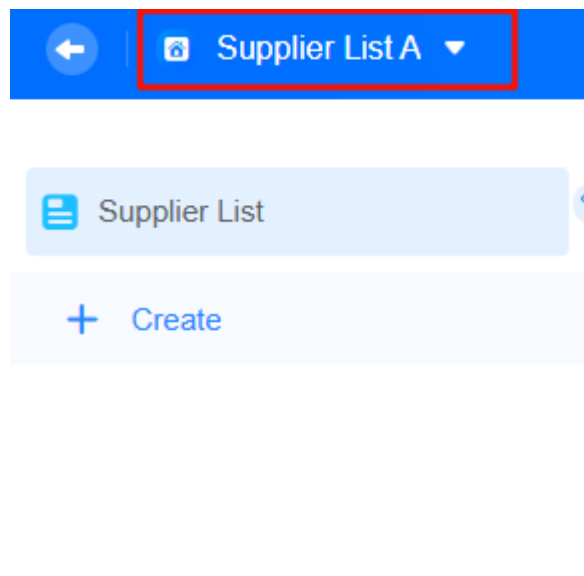
Step 4 Modify the application name, icon, and icon color as required.

Figure 3-47 Modifying the name and icon



After the modification, return to the application editing page. The application name and icon have been updated.

Figure 3-48 Viewing the modified name and icon



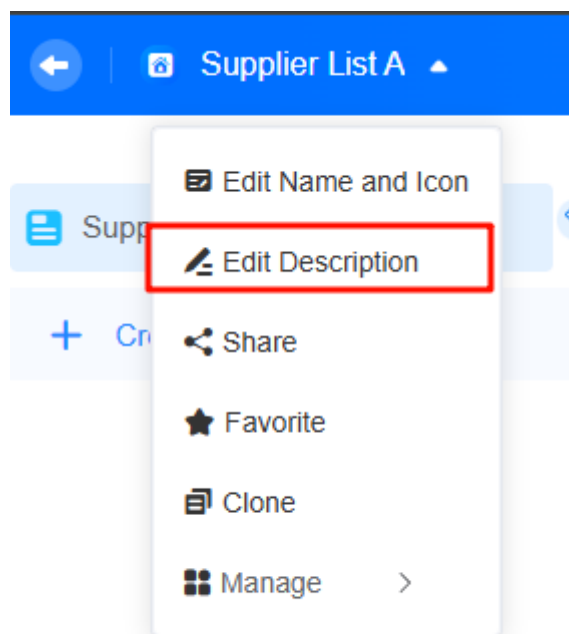
----End

Editing the Application Description

You can write a short line that explains what your application does so others see what it is for.

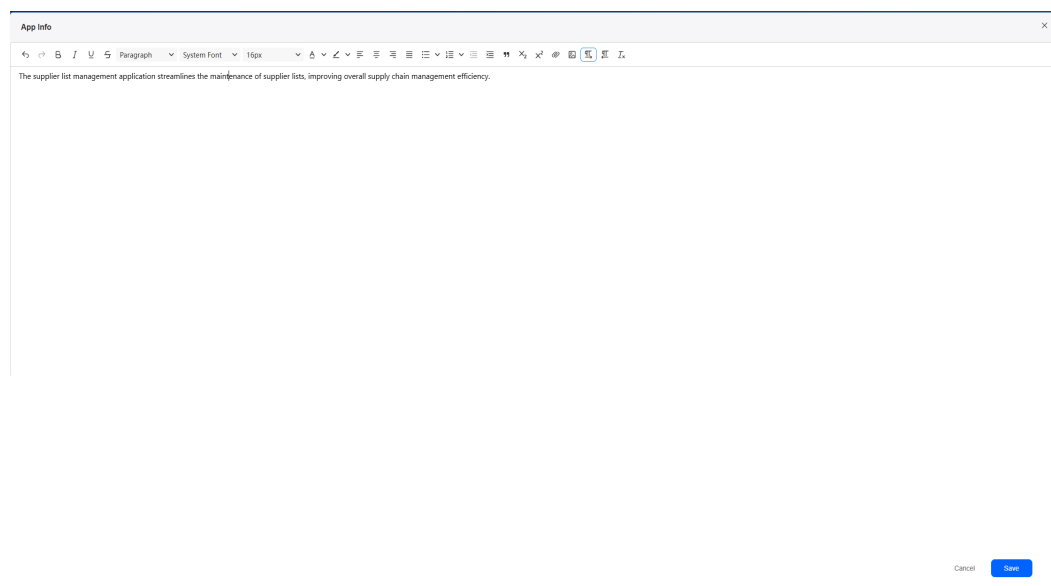
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** In the upper left corner of the page, click the application name and choose **Edit Description**.

Figure 3-49 Editing the application description



Step 4 Edit the application description and click **Save**.

Figure 3-50 Editing the application description




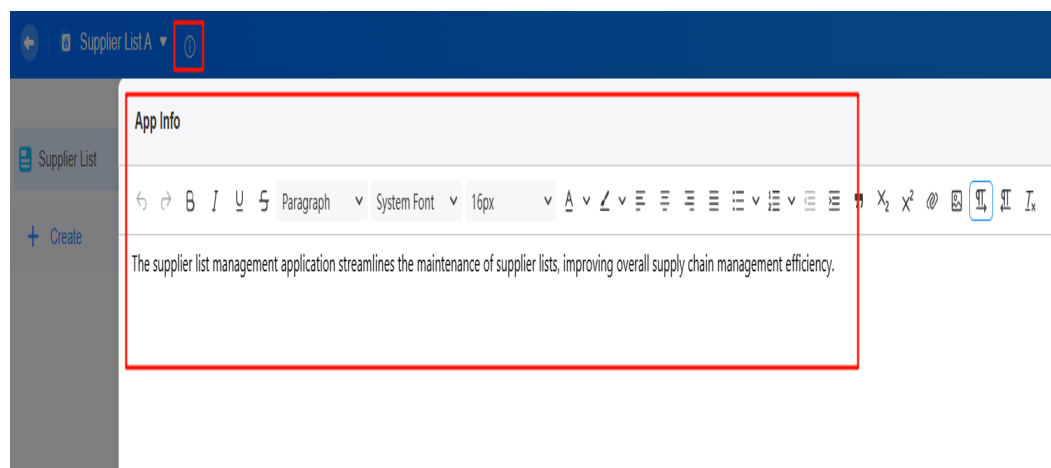
Step 5 Other users can click  next to the application name to view the application description.

Figure 3-51 Viewing the application description



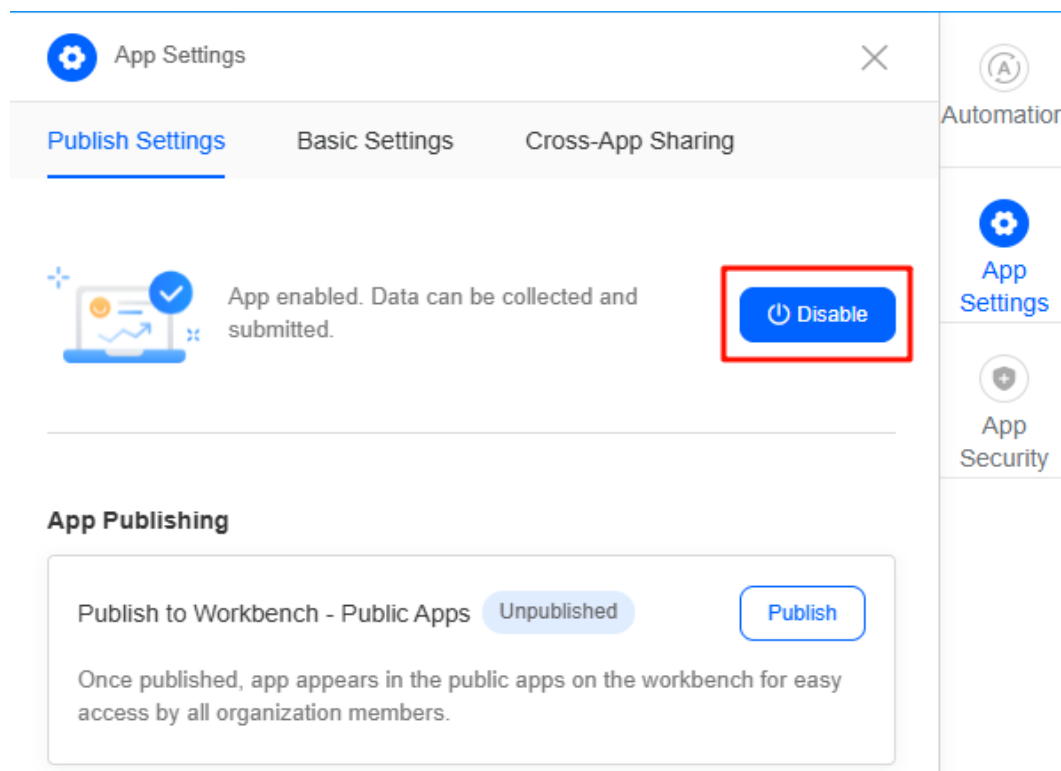
----End

Disabling an Application

After an application is disabled, it cannot be accessed, and data collection stops. To resume data collection, enable the application by referring to [Enabling an Application](#).

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application.
- Step 3** On the application details page, click **Edit App** in the upper right corner.
- Step 4** Click **App Settings** on the right. In the **Publish Settings** tab page, click **Disable**.

Figure 3-52 Disabling an application



Step 5 In the displayed dialog box, click the confirm button.

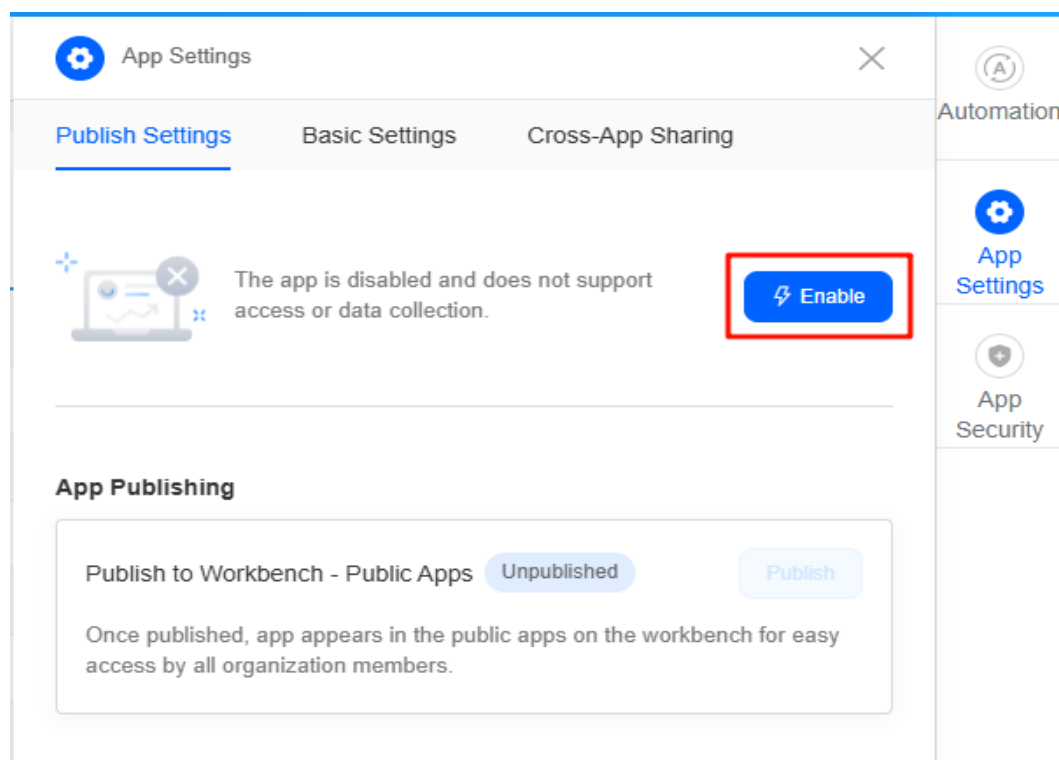
----End

Enabling an Application

By default, applications built on the platform are enabled and ready to collect data. To enable an application, perform the following steps:

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application.
- Step 3** On the application details page, click **Edit App** in the upper right corner.
- Step 4** Click **App Settings** on the right. In the **Publish Settings** tab page, click **Enable**.
The application is enabled for collecting data.

Figure 3-53 Enabling an application



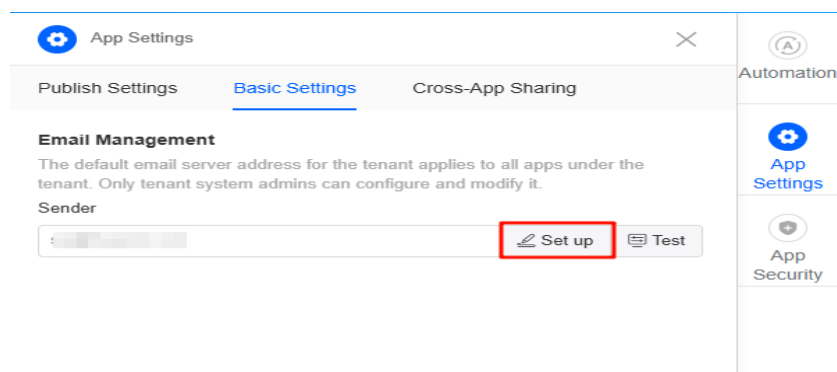
----End

Setting the Email Address

Email management lets a tenant set the sender address for notifications. **This address is the tenant-wide default. Only the tenant can change it; other members can only view and use it.**

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Choose **App Settings** > **Basic Settings**.
- Step 4** Under **Email Management**, click **Set up** of **Sender** to configure the mailbox.

Figure 3-54 Email Management



Step 5 Set the email information as prompted and click the confirm button.

Figure 3-55 Setting the email information

The dialog box titled "Email Management" contains the following fields:

- * Sender**: Input field containing "nocodetest@".
- * SMTP Service Address:Port**: Input field containing "smtp." followed by a masked IP address and "3".
- * UserName**: Input field containing "nocode" followed by a masked password.
- * Password**: Input field containing masked characters.

At the bottom, there are three buttons: "SMTP Mailbox Service Configuration" (blue), "Cancel" (gray), and "Confirm" (blue).

Step 6 Check whether the email address is set successfully.

When you set an automated task (see [Creating an Automated Task](#)) to send email, the address set here appears as the sender.

Figure 3-56 Sender email address

The screenshot shows a workflow editor on the left and a configuration panel on the right titled "Configure-Send email".

Workflow Editor:

- Trigger:** "When the following conditions occur: When data is created" (Supplier List).
- Execute Actions:** "Run: Run 1 actions" containing a "Send email" action.
- Configuration:** A "Please Configuration" button is visible under the "Send email" action.

Configuration Panel (Configure-Send email):

- Notification type:** "Email".
- * Sender Email:** A dropdown menu showing "nocodetest@...m", which is highlighted with a red box. A link "Email Management" is next to it.
- * Recipient:** A button "Select Member".
- CC To:** A button "Select Member".
- * Theme:** A text input field.

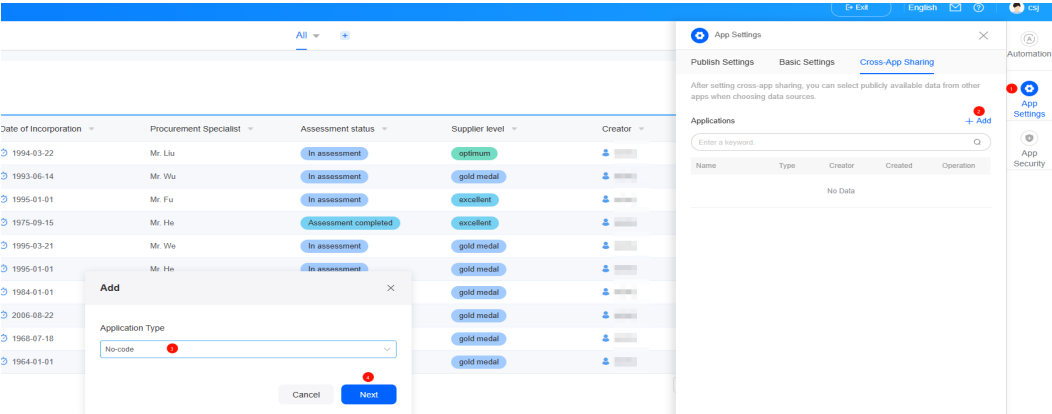
----End

Cross-Application Sharing

You can turn on cross-application sharing to pull in public data from other applications.

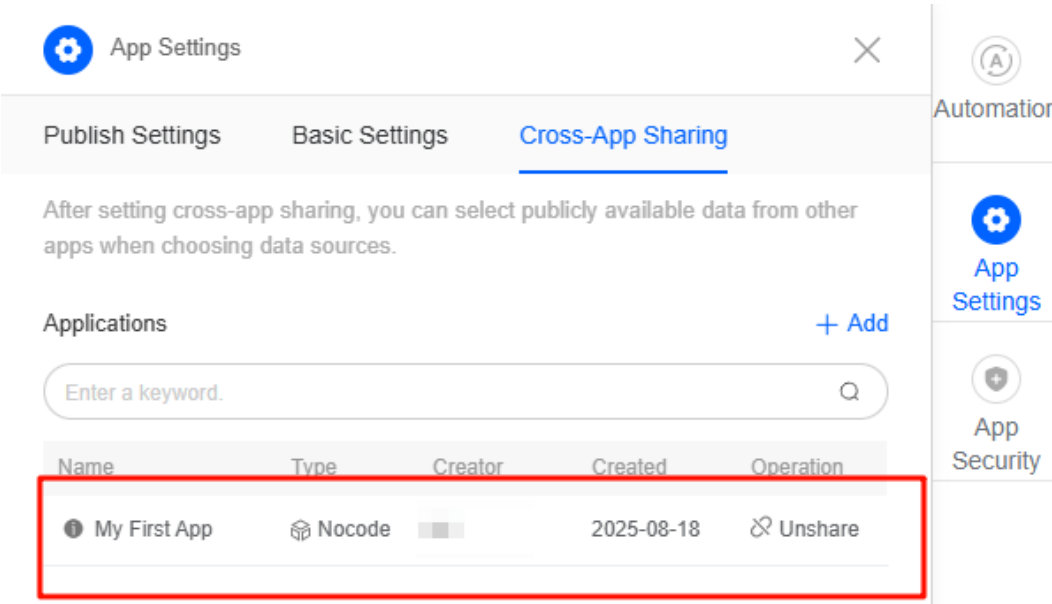
- Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3 Choose **App Settings** > **Cross-App Sharing**.
- Step 4 Click **Add**. The page for adding applications to be shared is displayed.
- Step 5 Specify the application type, and click **Next**.

Figure 3-57 Enabling cross-application sharing



- Step 6 Select a no-code or low-code application and click the confirm button.

Figure 3-58 Viewing the added applications



----End

Exporting an Application

You can save your application to a compressed file. Import this file to any no-code workbench. Only the setup is copied; the data stays. Limits:

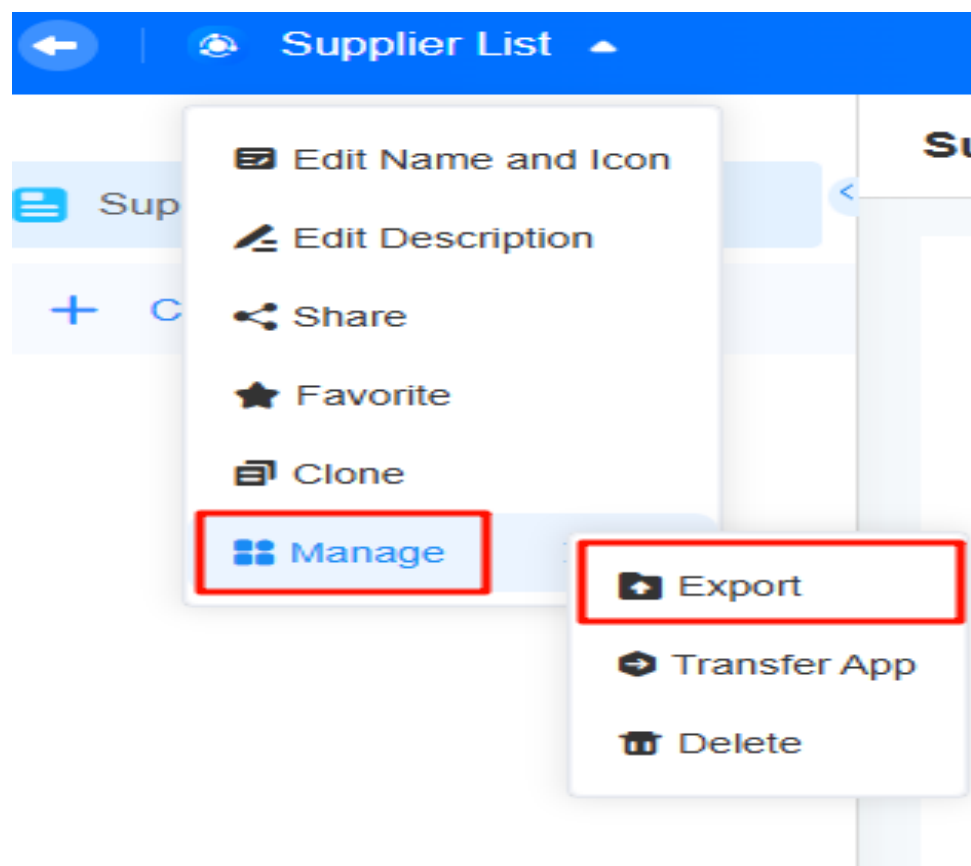
- Only tenant administrators can export application packages.
- If a form in an application is linked to a form in another application, the link breaks on export. Re-link it after import.
- Free and professional editions do not support this feature.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

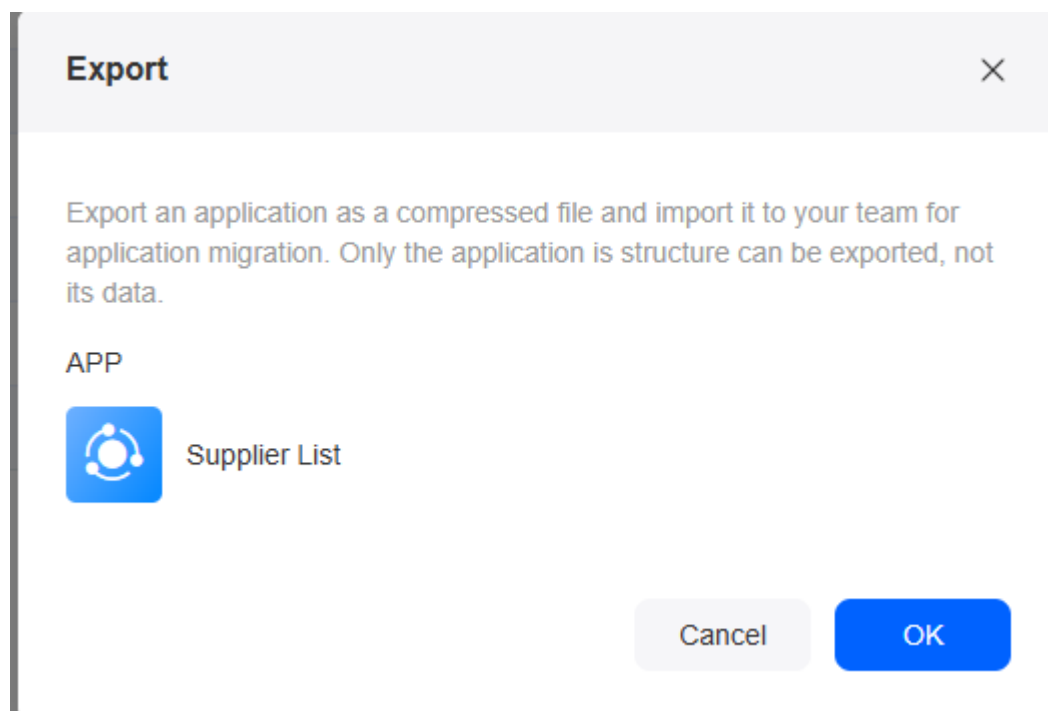
Step 3 On the application editing page, click the arrow icon next to the application name and choose **Manage** > **Export**.

Figure 3-59 Exporting an application



Step 4 On the displayed dialog box, click **OK**.

Figure 3-60 Confirming the operation



Step 5 Import the application to other no-code workbenches.

----End

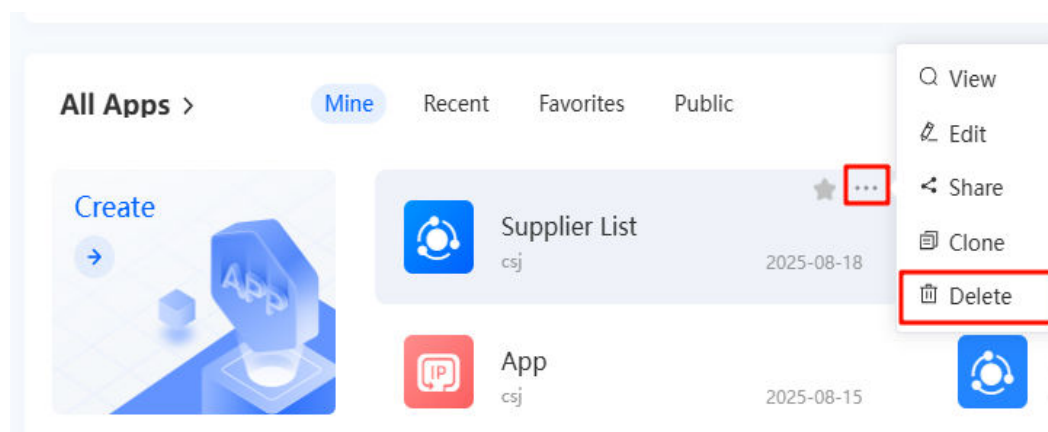
Deleting an Application

When you delete an application, its forms, reports, and data are deleted and cannot be restored. Proceed with caution. **Currently, only service administrators and developers can delete applications.**

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

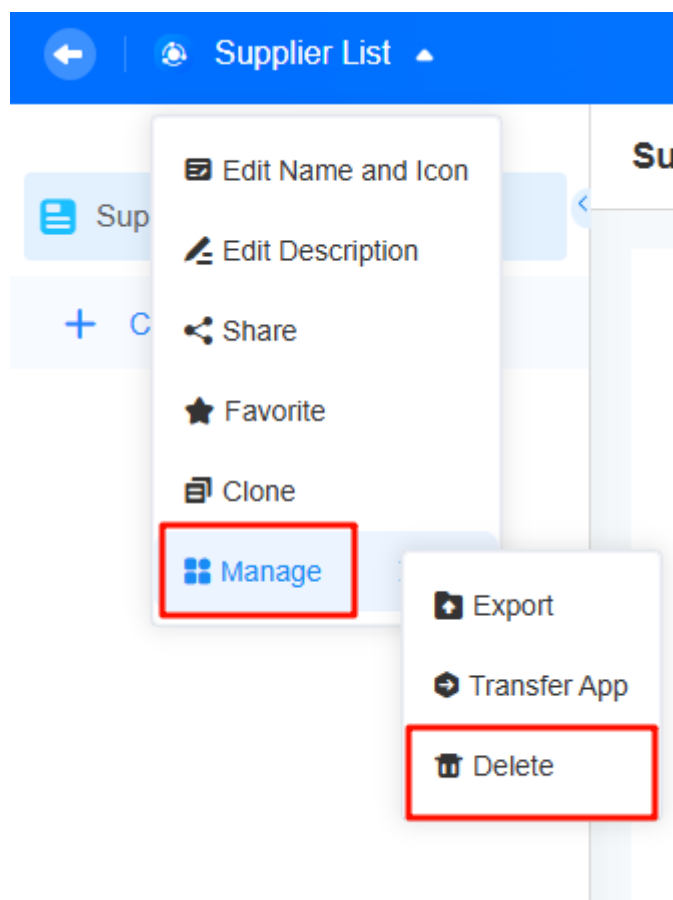
Step 2 In **All Apps**, hover over the target application's ... and choose **Delete**.

Figure 3-61 Deleting an application on the workbench



You can also access the application's details page, click the arrow icon next to the application name, and choose **Manage** > **Delete**.

Figure 3-62 Deleting an application on its details page



Step 3 In the displayed dialog box, enter the application name and click **Delete**.

----End

Transferring an Application

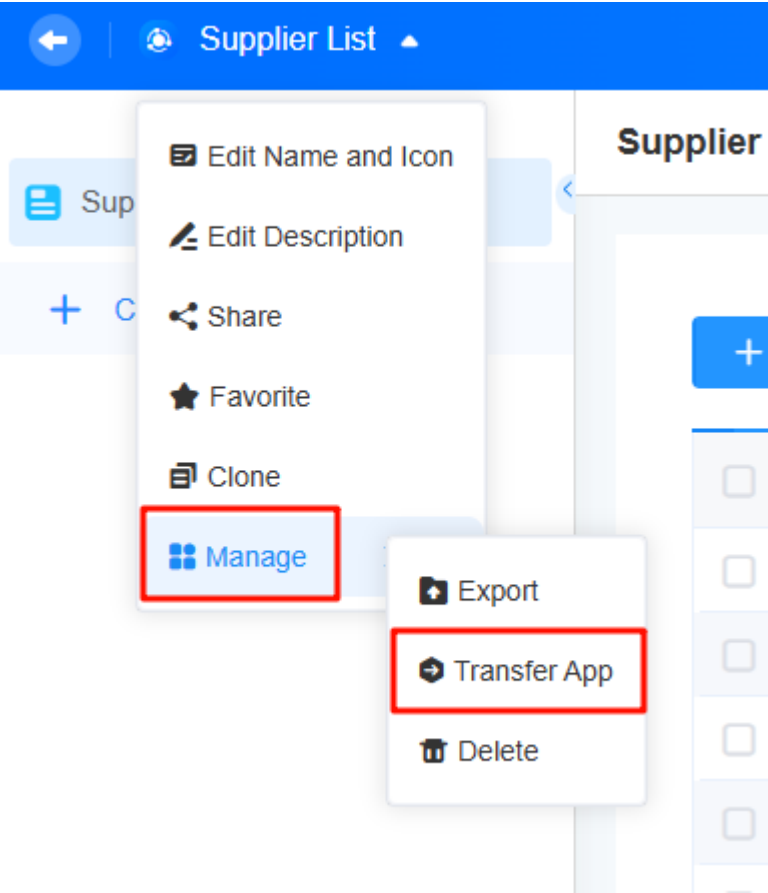
The application owner has the highest permissions and is not restricted by role permissions.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

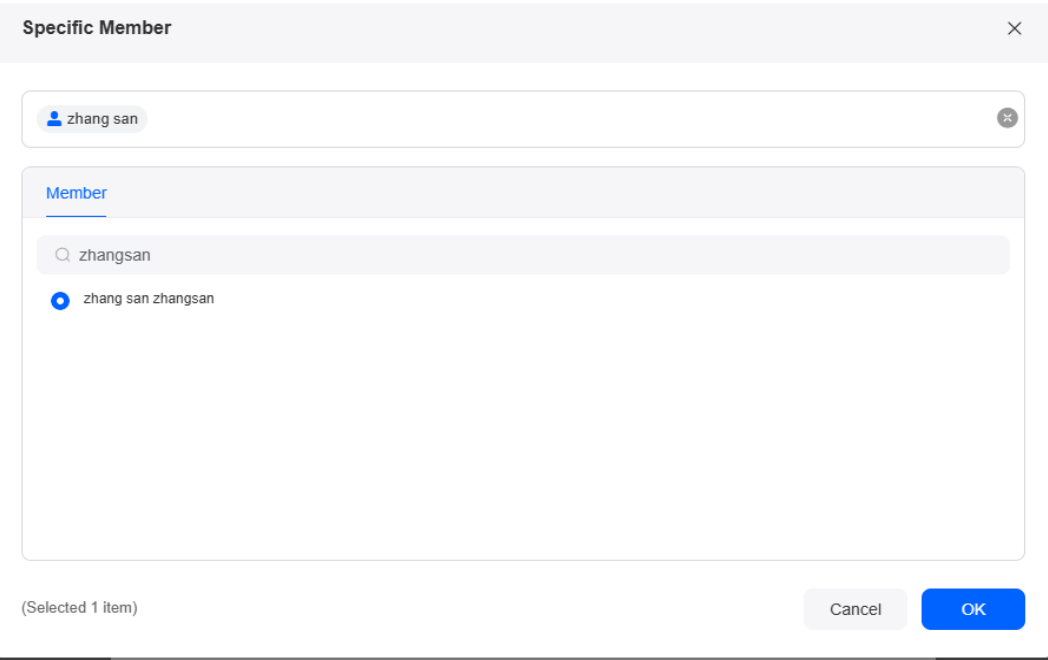
Step 3 On the application editing page, click the arrow icon next to the application name and choose **Manage** > **Transfer**.

Figure 3-63 Selecting Transfer



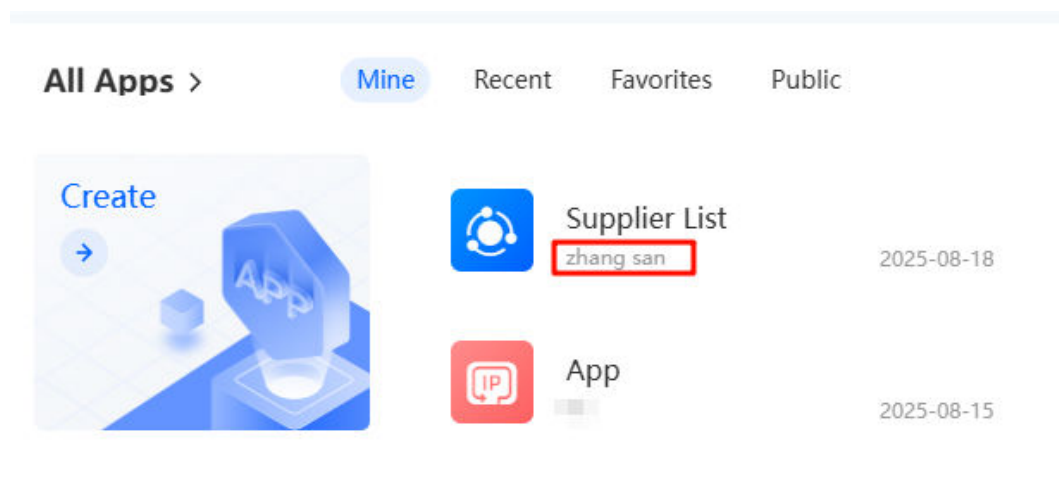
Step 4 On the displayed page, select the new application owner and confirm the operation.

Figure 3-64 Transferring an application



Step 5 Verify whether the application is successfully transferred.

Return to the no-code workbench. On the **Mine** tab page, the application owner has been changed (for example, to Zhang San).



----End


3.6 Managing No-Code Applications on Mobile Devices

Creating a Group

If there are too many forms in an application, you can create groups to manage and view the forms.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.


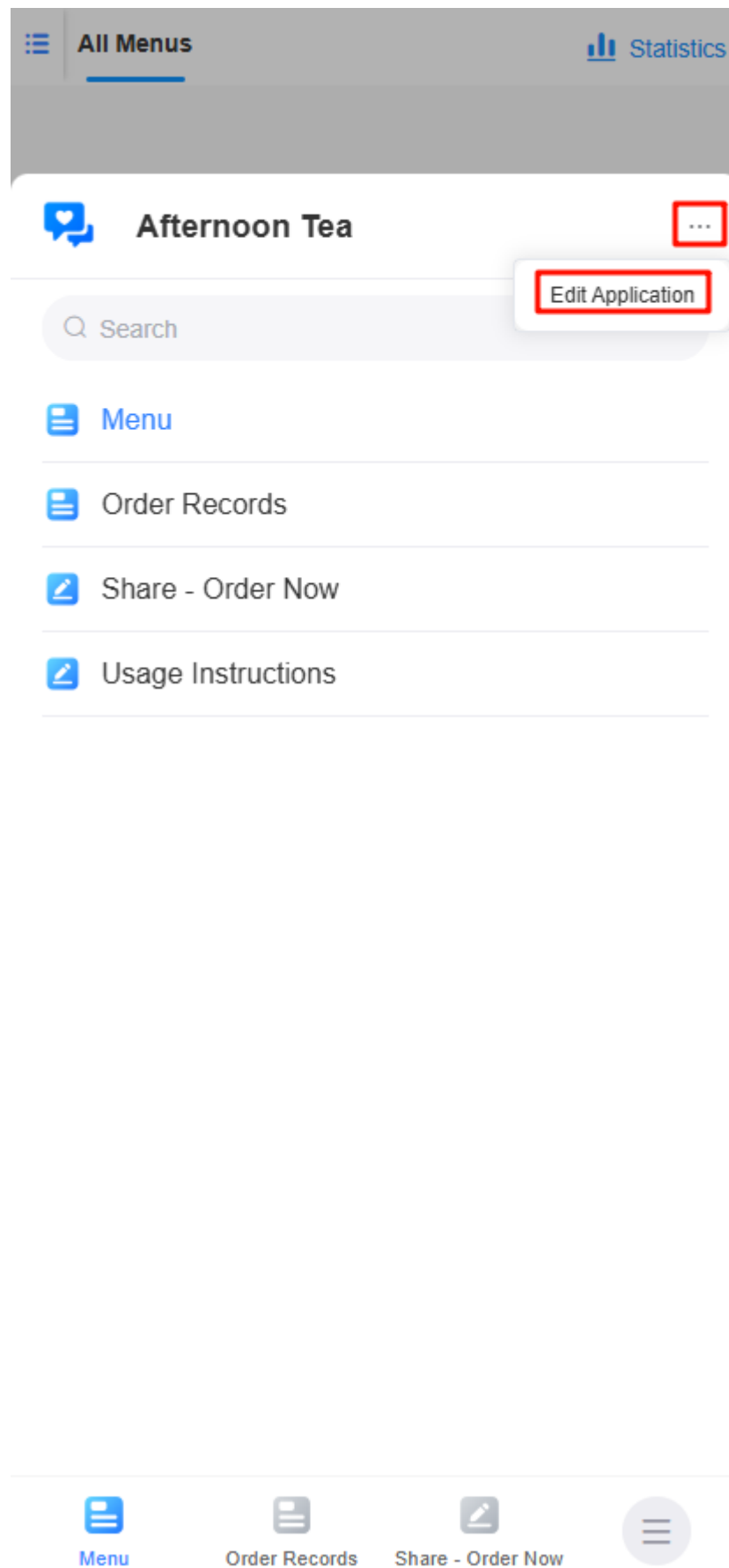
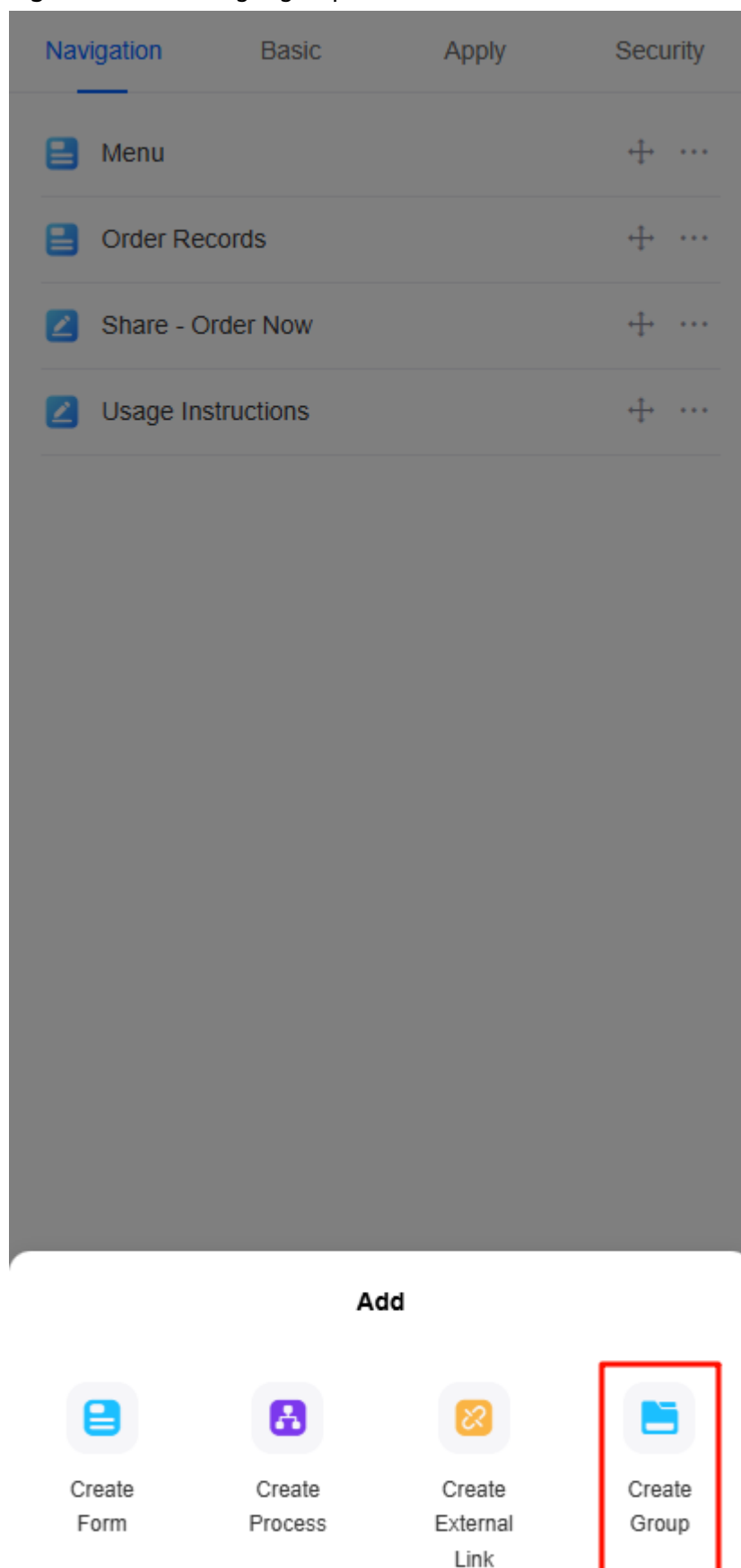
Step 4 On the displayed page, tap  and tap the edit button.

Figure 3-65 Editing an application



Step 5 On the navigation settings tab page, tap the create button to create a group.

Figure 3-66 Creating a group



Step 6 On the displayed page, set the name of the new group and tap the confirm button.

Drag a form to the group.


----End

Editing an Application

You can edit an application as required.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.


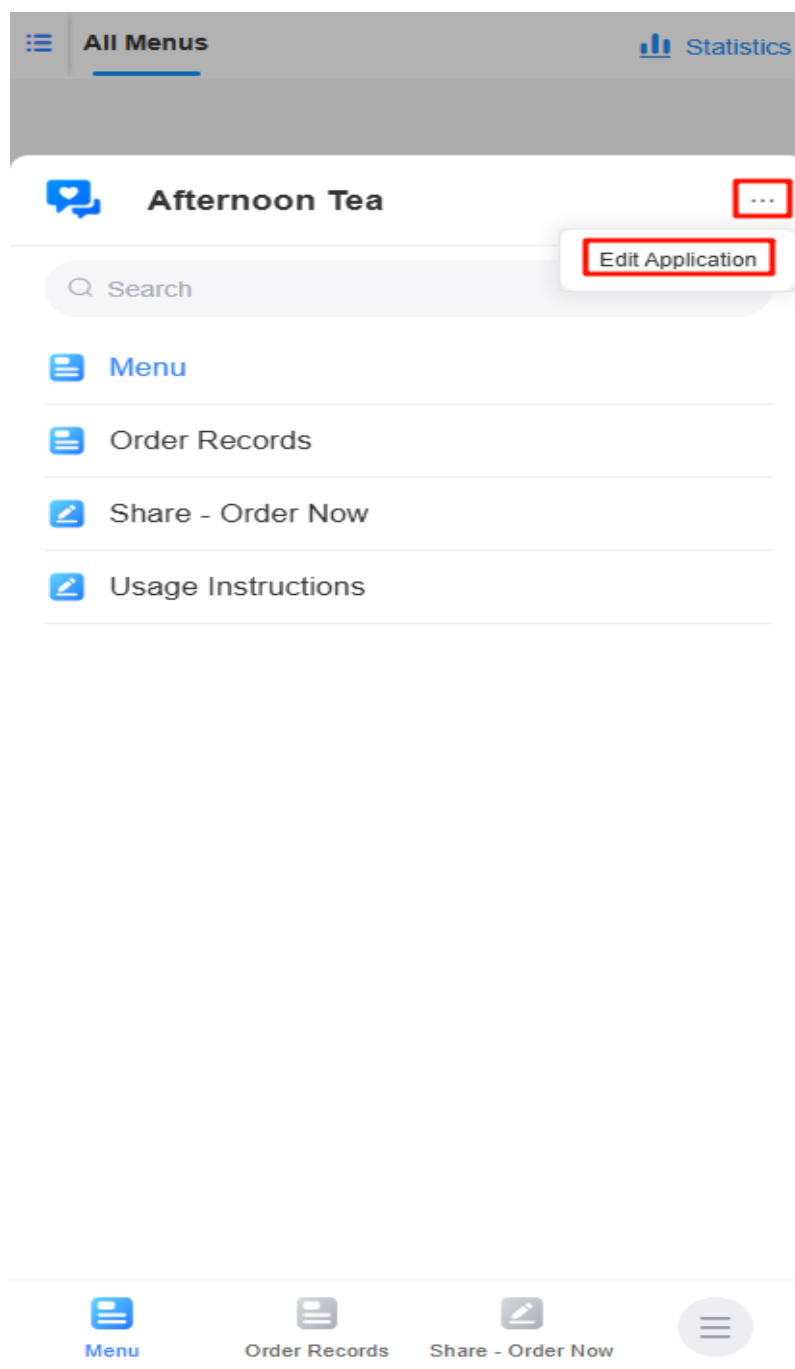
Step 4 On the displayed page, tap  and tap the edit button.

Figure 3-67 Editing an application



Step 5 Edit the application as required.


----End

Modifying the Application Name and Icon

You can modify the name and icon of an application.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.


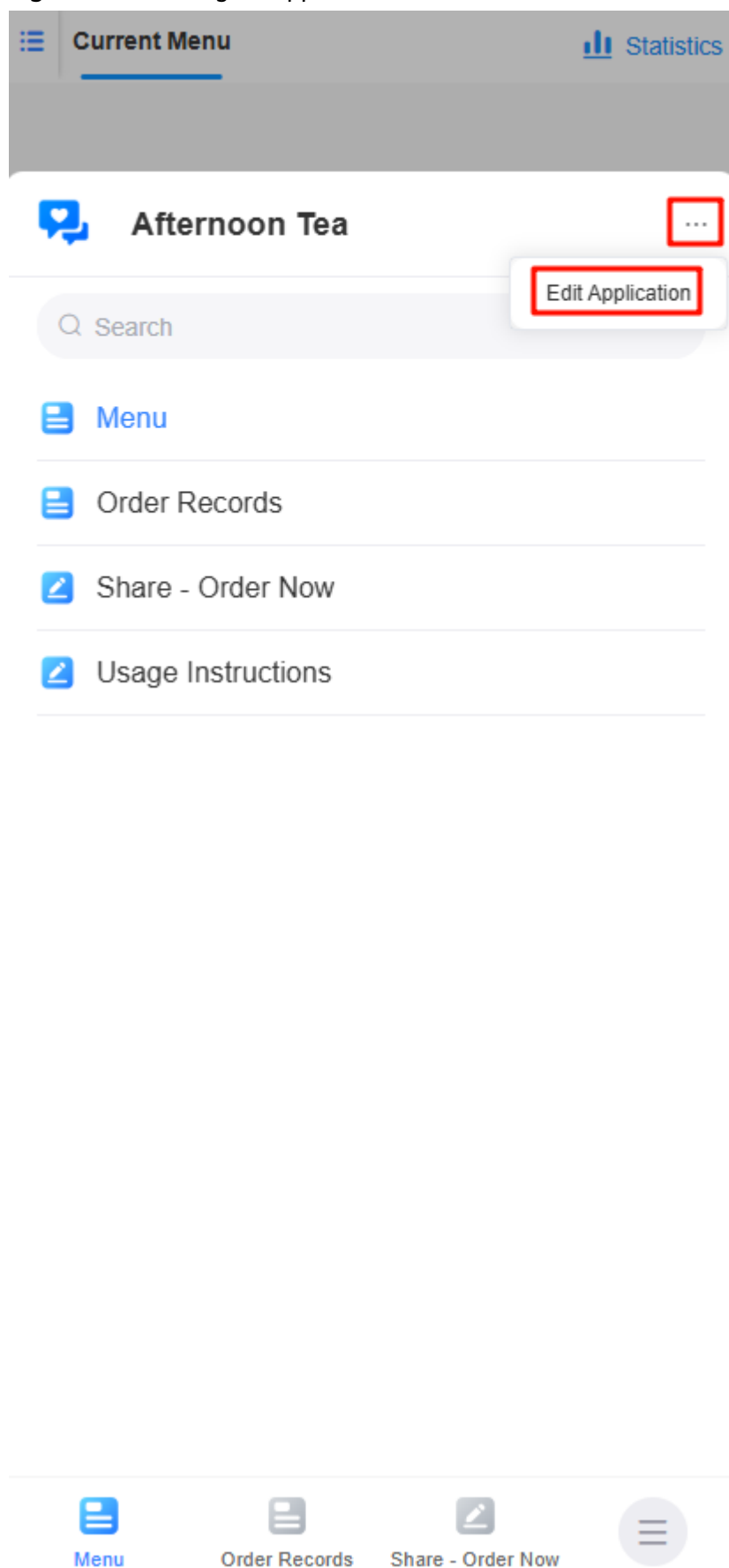
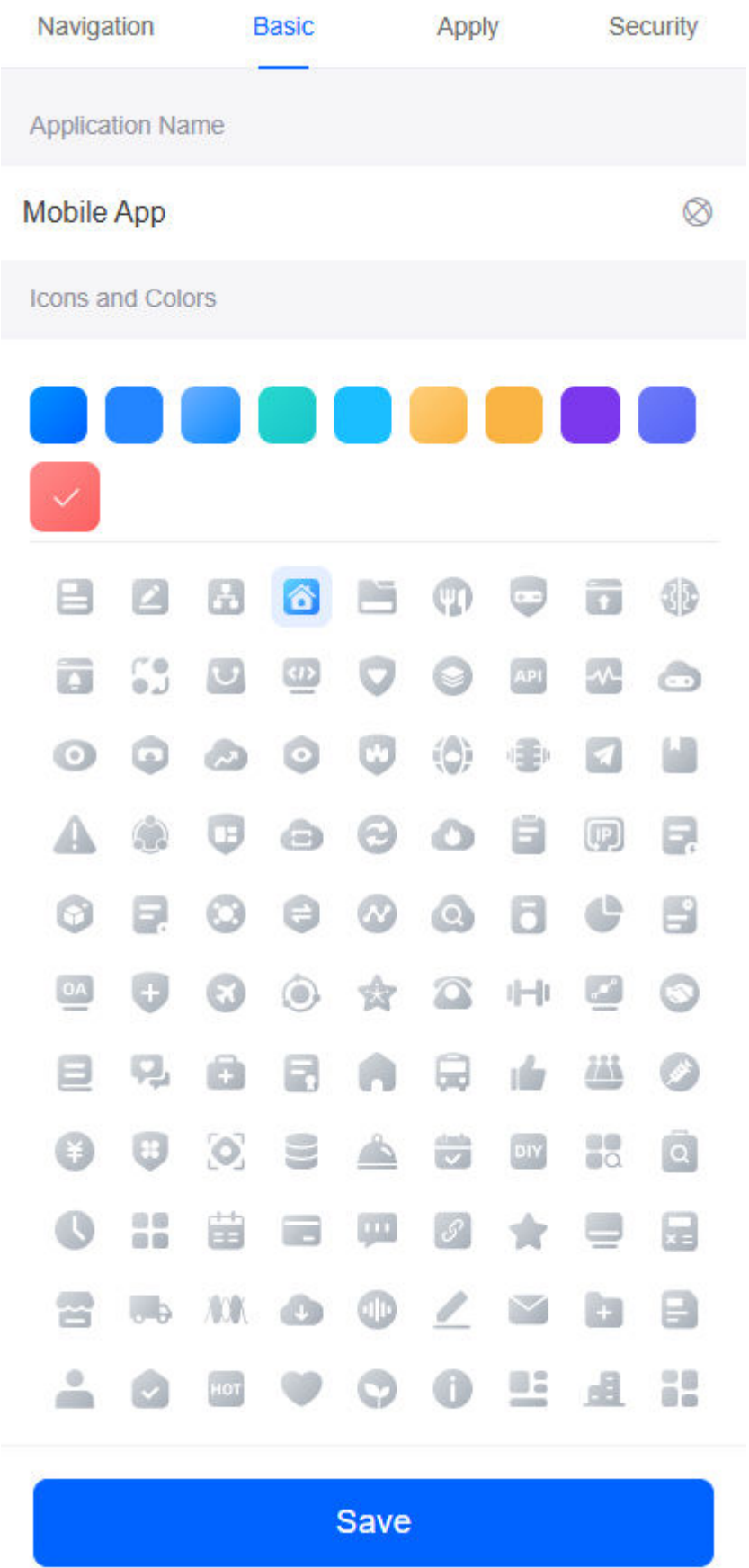
Step 4 On the displayed page, tap  and tap the edit button.

Figure 3-68 Editing an application



- Step 5** On the basic information tab page, modify the application name and icon, and tap the save button.

Figure 3-69 Modifying an application name and icon




Setting Applications

In the application settings, you can set its maintenance status and choose whether to release it to the workbench.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.


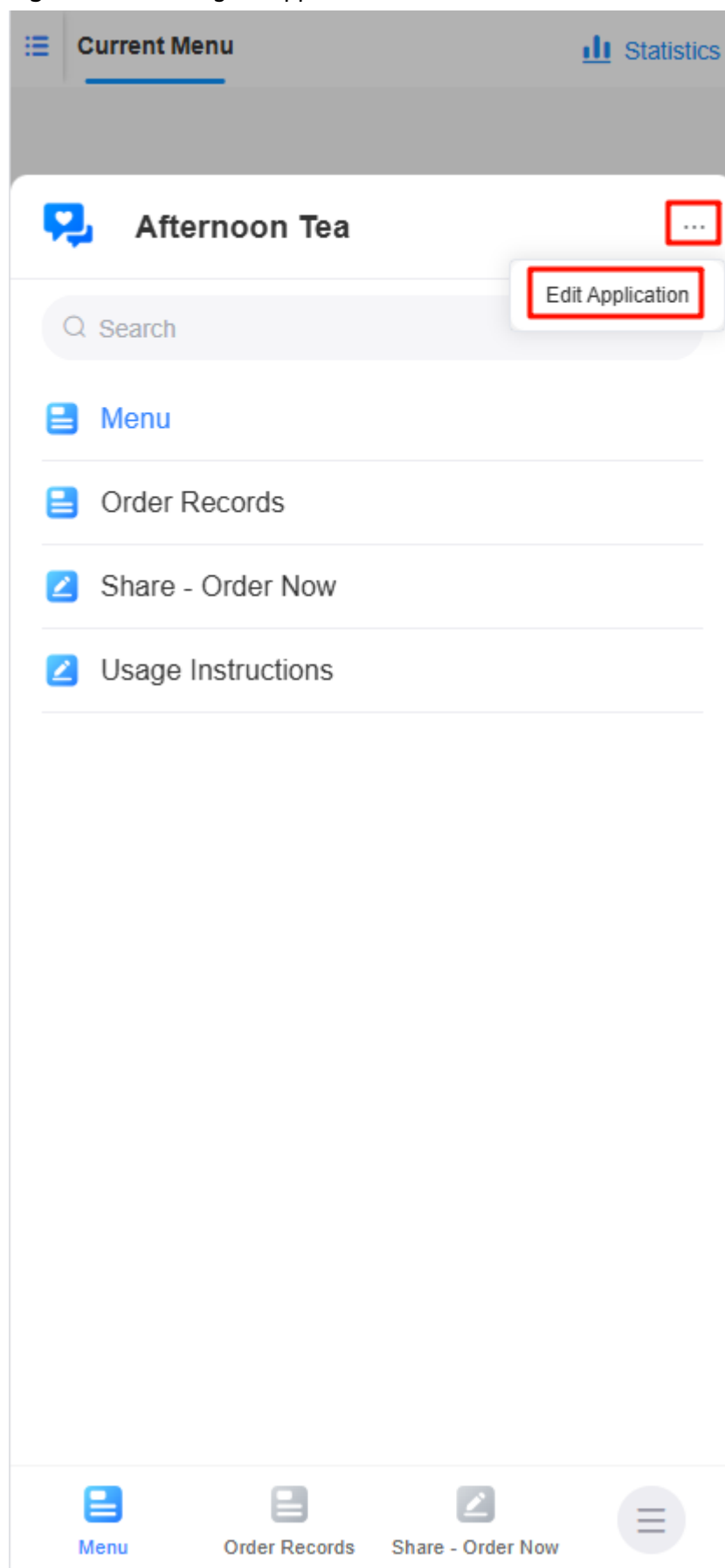
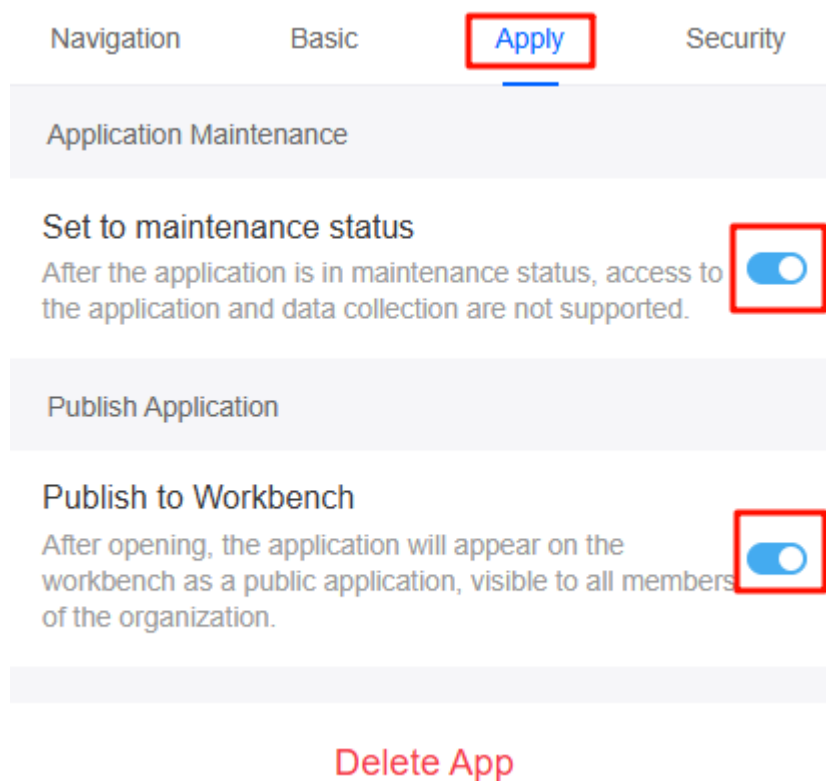
Step 4 On the displayed page, tap  and tap the edit button.

Figure 3-70 Editing an application



Step 5 On the application settings tab page, set parameters as required.

Figure 3-71 Application settings




----End

Deleting an Application

When you delete an application, its forms, reports, and data are deleted and cannot be restored. Proceed with caution.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.


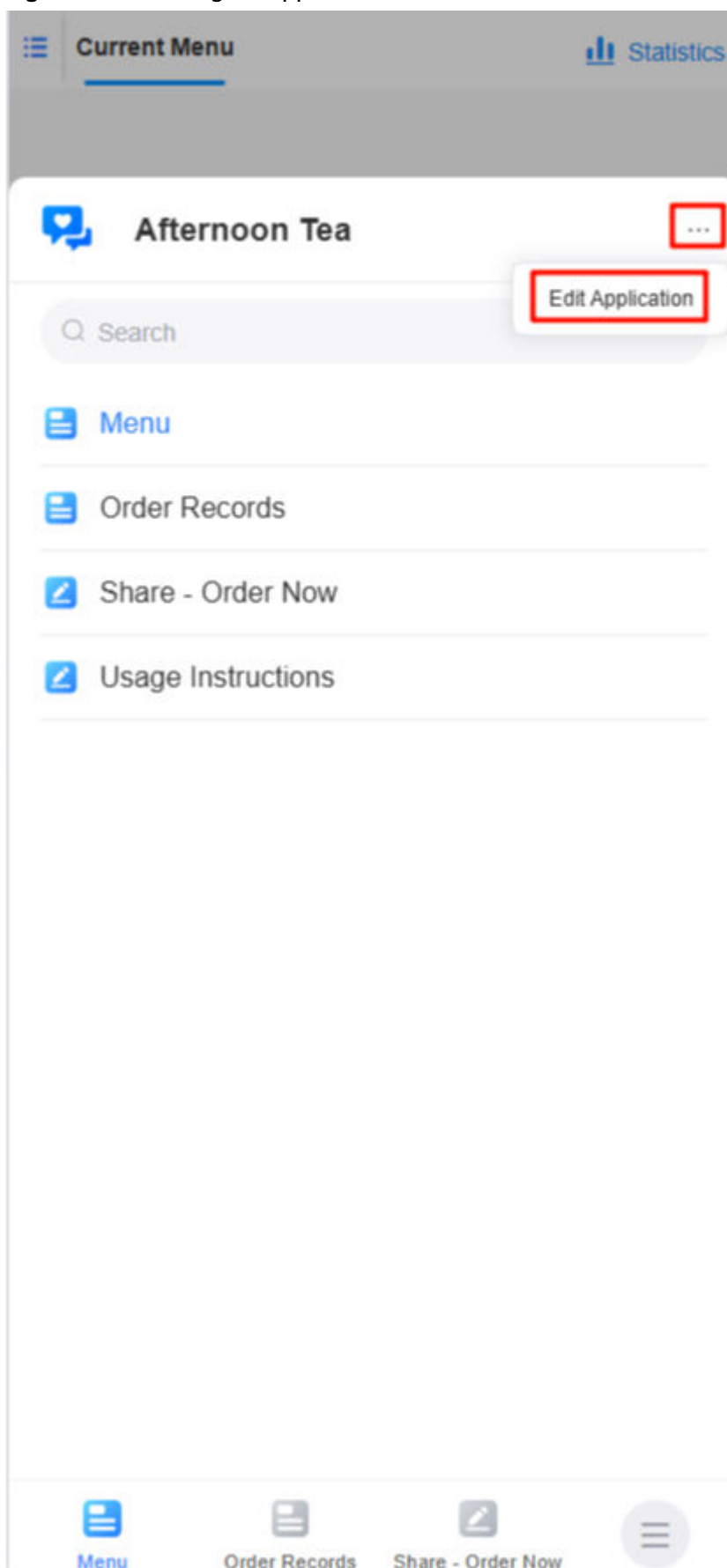
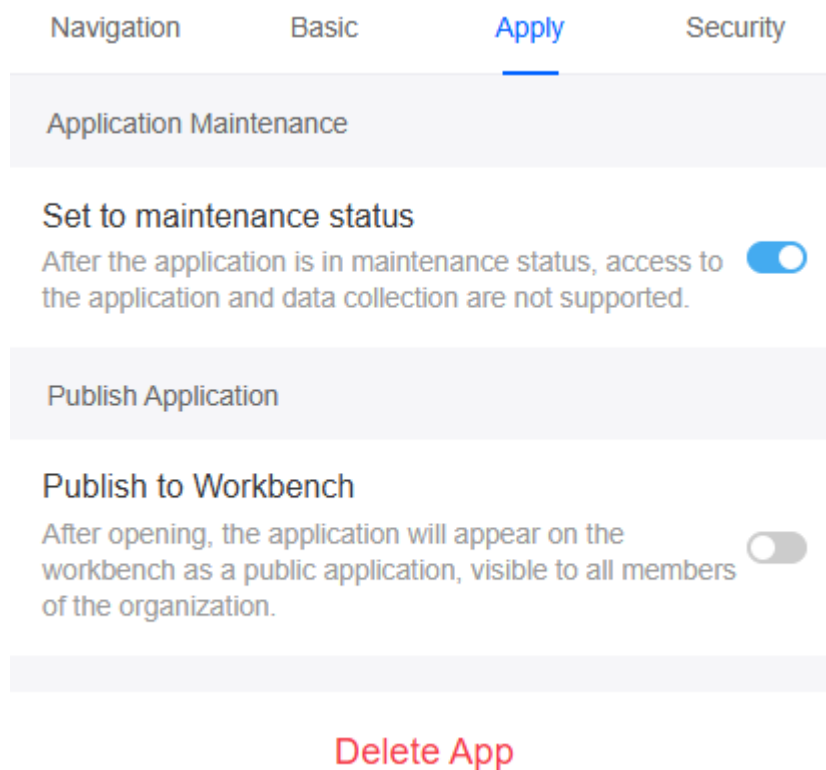
Step 4 On the displayed page, tap  and tap the edit button.

Figure 3-72 Editing an application



Step 5 On the application settings tab page, tap the button to delete the application.

Figure 3-73 Deleting an application



Step 6 Enter the name of the target application and confirm the operation.

----End

4 Creating a Form or Process

4.1 Form/Process Overview

To create an application, start with a form or process. You can use over 20 controls to customize it.

Figure 4-1 Designing a form

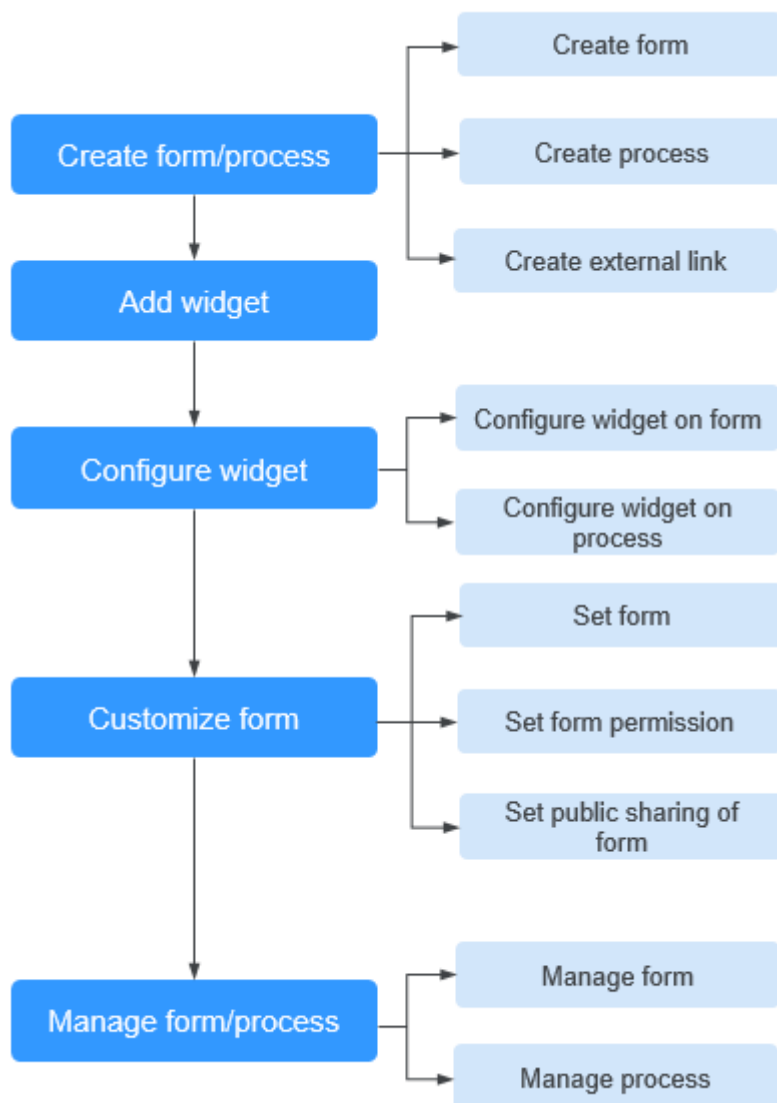


Table 4-1 Designing a form or process

Operation	Description
Creating a form or process	<p>You can add a form or process to an application.</p> <ul style="list-style-type: none"> Forms are good for collecting and sharing data, and following events. <ul style="list-style-type: none"> Creating a Blank Form: Drag and arrange widgets that match the field data type on the canvas to create a form. A form, along with its views and statistical tables, make up an application. Creating a Form from Excel: Design the form fields and data in Excel. Then, import it to quickly create a form. Processes are good for business approvals, teamwork, and task coordination. Creating a Process: Tasks like trip requests or service ticket assignments need several roles to act in order. Create a process to guide them. External links are good for quick integration of applications with external resources. Creating an External Link: Create external links to add external pages into no-code applications. This enhances applications functionality.
Adding widgets to the form	<p>A widget stores data. A form is made up of many widgets. Each widget type stores a different type of data. For instance, text widgets save text, and date widgets save dates.</p> <p>See Adding Widgets For a Form to add widgets to the form.</p>
Setting widget properties	<p>See Setting Form Widget Properties and Setting Process Widget Properties to set widgets' properties and appearances.</p>
Customizing the form	<p>After a form is created, you can customize the form.</p> <ul style="list-style-type: none"> Customizing a Form: Set how the form displays data, its features, search speed, and help text. Setting the Form Visibility Permission: Choose which roles can see the form to keep data safe. Sharing Forms: Open the form via a link or QR code without logging in. Use this mode for large-scale data collection such as surveys or event sign-ups. Creating a Form Filling Page for a Form: Create a data entry page. Users can use this page to vote, answer surveys, or clock in/out.

Operation	Description
Managing forms/ processes	See Managing Forms on PCs , Managing Forms on Mobile Devices , and Managing Processes to manage forms or processes.

4.2 Creating a Form

A form is made up of widgets such as text boxes, option buttons, and drop-down lists. It collects user data. You can create multiple forms in an application. Each form is for a data type.

- Creating a blank form: Drag and arrange widgets that match the field data type on the canvas to create a form. A form, along with its views and statistical tables, make up an application.
- Creating a form from Excel: Design the form fields and data in Excel. Then, import it to quickly create a form. The Excel file must meet these rules:
 - Upload one Excel file with as many sheets as you need. Each sheet becomes a separate form.
 - Each file must not exceed 10 MB.
 - Each sheet can have up to 200 columns and 10,000 rows.

Prerequisites

You have created a no-code application. If not, see [Creating a No-Code Application](#).

Creating a Blank Form

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** In the list on the left of the application editing page, click **Create** and choose **Create Form**.
- Step 4** On the displayed page, move the cursor to **Create Blank Form** and click **Create** to access the application editor. See [Figure 4-2](#).

Figure 4-2 Editing a form

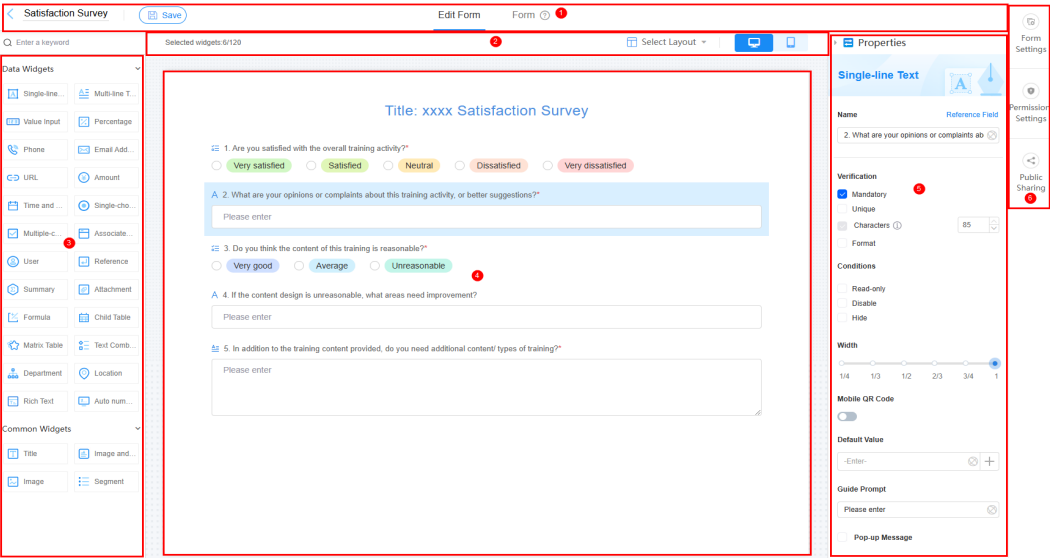


Table 4-2 Editor functions

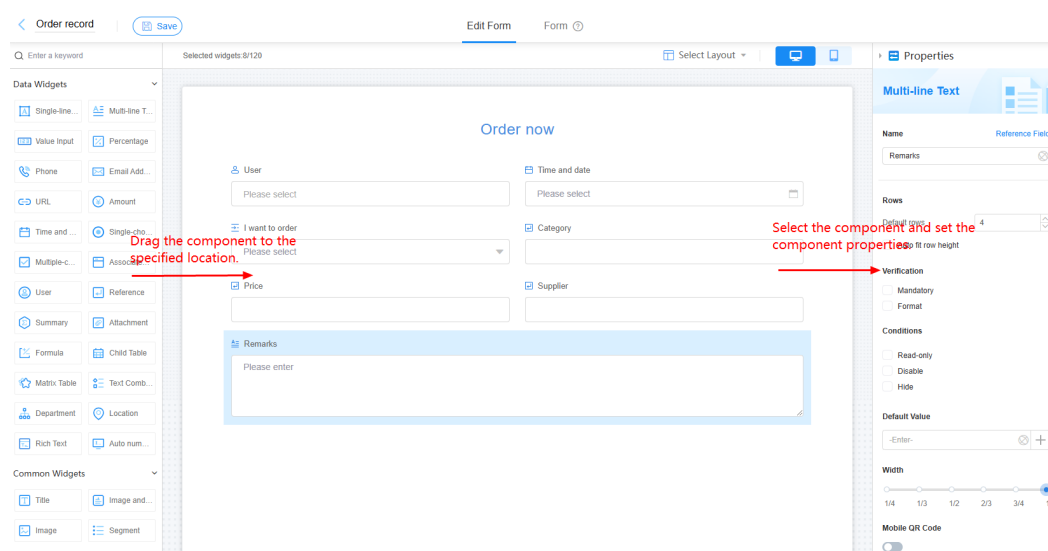
Area	Description
1	This area offers: <ul style="list-style-type: none">Form name setting.Form data saving.Form editing: Drag and drop widgets to design the form.Form filling: Share a fill-in page for surveys, votes, or clock-ins and set rules as needed.
2	<ul style="list-style-type: none">Click Select Layout to adjust the number of form columns.Choose where the form appears: PC or mobile.
3	Widget area: data widgets and common widgets. For details about each widget, see Setting Form Widget Properties .
4	Form design area.
5	Widget property panel.
6	See Customizing a Form and Setting the Form Visibility Permission to set form properties.

Step 5 Design a form.

A form is made up of widgets such as text boxes, option buttons, and drop-down lists. You can create multiple forms in an application. Each form is for a data type. See [Adding Widgets For a Form](#) and [Setting Form Widget Properties](#) to add widgets to a form and set widget properties.

On the workbench, you can build forms for surveys, meeting room bookings, expense claims, meal orders, health check-ins, or polls.

Figure 4-3 Meal order form



Step 6 Customize the form.

Creating a Form Filling Page for a Form: Create a data entry page for users to vote, answer surveys, or clock in/out. Set rules such as allowing repeat entries or showing only selected fields.

Customizing a Form: Set the form's data title, features, and submission prompts.

Setting the Form Visibility Permission: Grant the view permission for the form.

Sharing Forms: Open the form via a link or QR code without logging in.

Step 7 Click the save button.

The form appears in the application editor.

----End

Creating a Form from Excel

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

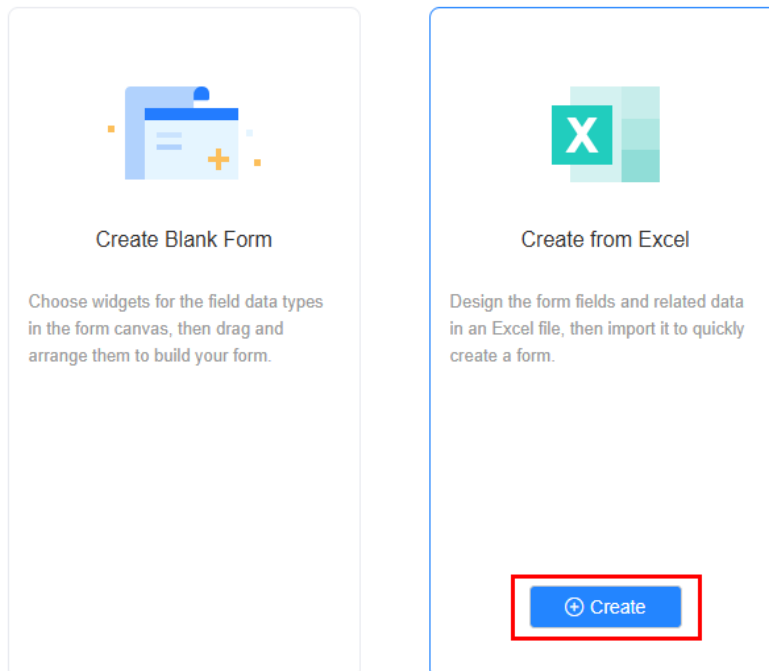
Step 3 In the list on the left of the application editing page, click **Create** and choose **Create Form**.

Step 4 On the **Create Form** page, move the cursor to **Create from Excel** and click **Create**.

Figure 4-4 Selecting Create from Excel

Create Form

Choose a method to create your form.

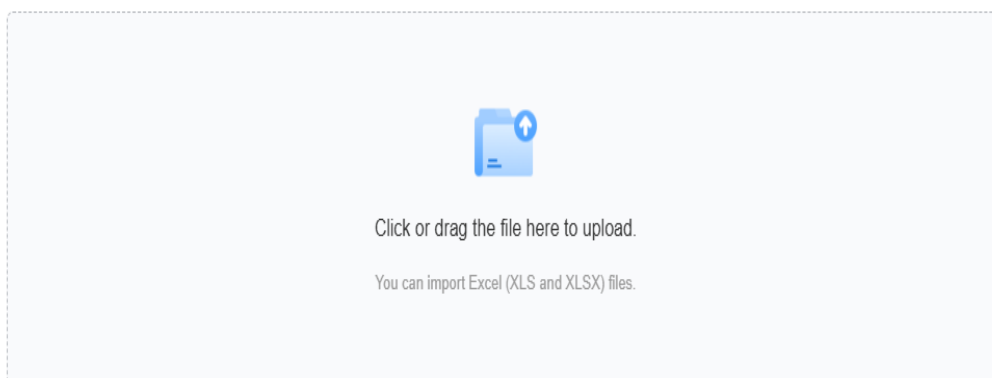


Step 5 On the displayed page, download the template.

Figure 4-5 Downloading the template

Create Form from Excel

You can import Excel (XLS and XLSX) files.



1. Only one Excel file can be imported, but it can have multiple sheets. Each sheet will become a separate form.
2. Each file must not exceed 10 MB.
3. Each table cannot have more than 200 columns or 10,000 data rows.

[Download Template](#)

Step 6 The downloaded template is **Supplier List.xlsx**. Modify the data for your needs.

Notes:

- Upload one Excel file with as many sheets as you need. Each sheet becomes a separate form.
- Each file must not exceed 10 MB.
- Each sheet can have up to 200 columns and 10,000 rows.

Step 7 Drag the **Supplier List.xlsx** file to the middle area, see **Figure 4-5**. **Figure 4-6** is displayed.

Figure 4-6 Uploading a template

Below is the Excel template you uploaded. Adjust the default items identified by the system.

Group Name

Supplier List

Re-upload

(Max. size: 2 MB)

Click any row to set it as the title row. Data above the title row will not be imported.

Supplier List

	Title	Corporate name	Company type	Date of Incorporation	Procurement Specialist	Assessment status	Supplier level
2			Sole foreign investment	1964-01-01	Mr. He	In assessment	gold medal
3			listed company	1968-07-18	Mr. Guo	Assessment completed	gold medal
4			Limited by shares	2006-08-22	Ms. Mao	In assessment	gold medal
5			listed company	1984-01-01	Mr. Li	In assessment	gold medal
6			Limited by shares	1995-01-01	Mr. He	In assessment	gold medal
7			Limited by shares	1995-03-21	Mr. We	In assessment	gold medal
8			Limited by shares	1975-09-15	Mr. He	Assessment completed	excellent
9			Limited by shares	1995-01-01	Mr. Fu	In assessment	gold medal

Next

Step 8 Click **Next** and check the title types the system has assigned.

Figure 4-7 Checking or modifying the title types

Below is the Excel template you uploaded. Adjust the default items identified by the system.

Group Name

Supplier List

Re-upload

(Max. size: 2 MB)

Click any row to set it as the title row. Data above the title row will not be imported.

Supplier List

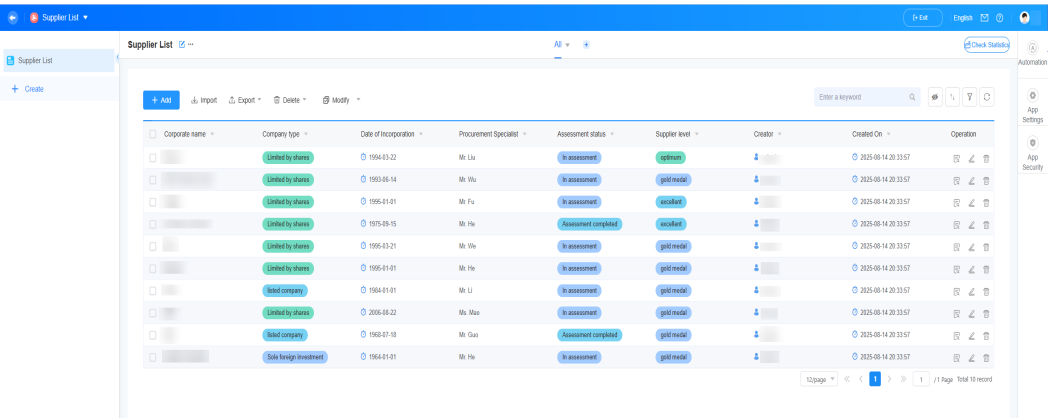
	A(Text)	B(Single)	C(Date and Time)	D(Text)	E(Single)	F(Single)
1	Corporate name	Company type	Date of Incorporation	Procurement Specialist	Assessment status	Supplier level
2		Sole foreign investment	1964-01-01	Mr. He	In assessment	gold medal
3		listed company	1968-07-18	Mr. Guo	Assessment completed	gold medal
4		Limited by shares	2006-08-22	Ms. Mao	In assessment	gold medal
5		listed company	1984-01-01	Mr. Li	In assessment	gold medal
6		Limited by shares	1995-01-01	Mr. He	In assessment	gold medal
7		Limited by shares	1995-03-21	Mr. We	In assessment	gold medal
8		Limited by shares	1975-09-15	Mr. He	Assessment completed	excellent
9		Limited by shares	1995-01-01	Mr. Fu	In assessment	excellent
10		Limited by shares	1995-01-01	Mr. Fu	In assessment	gold medal

Previous

Import

Step 9 Click **Import** to create a form from the Excel file.

Figure 4-8 Creating a supplier list form



----End

Related Documents

After creating a form, create a data entry page for voting, surveys, or clock-ins, and set rules. For details, see [Creating a Form Filling Page for a Form](#).

4.3 Creating a Process

Tasks like trip requests or service ticket assignments need several roles to act in order. Create a process to guide them.

This example shows a trip request, using these roles:

- Trip applicant: fills in the trip form and sends it to the approver.
- Approver: approves or rejects the form. If rejected, the form returns to the applicant for changes. If approved, the applicant is notified by email.
- CC recipient: receives a copy of the approval email and takes no action.

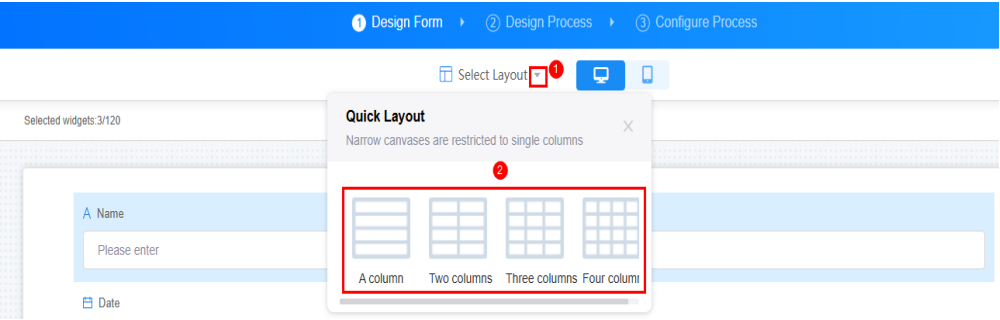
Prerequisites

You have created a no-code application. If not, see [Creating a No-Code Application](#).

Creating a Process

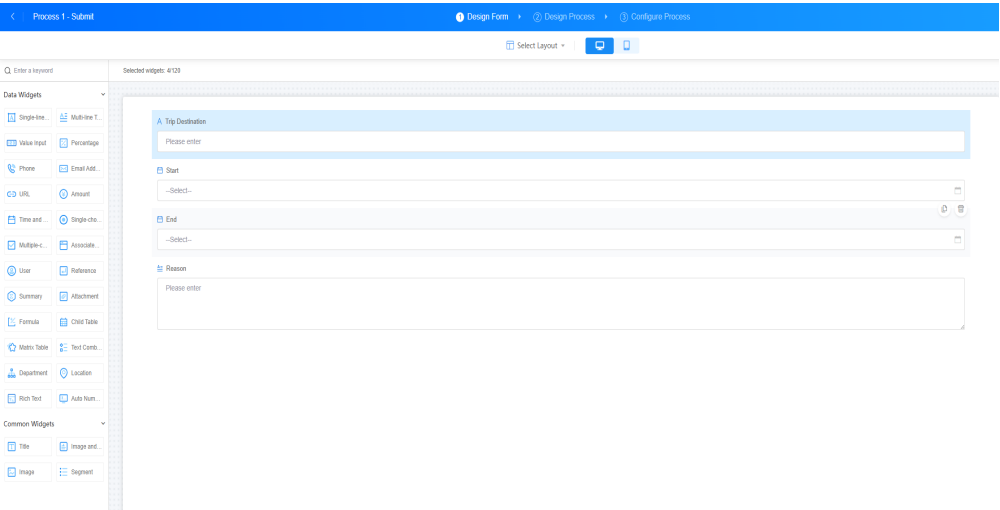
- Step 1
- Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2
- In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3
- In the list on the left of the application editing page, click **Create** and choose **Create Process**.
- Step 4
- Design a form.
 1. In the upper middle of the page, click **Select Layout** to select the desired form layout.

Figure 4-9 Selecting a layout



2.
- In the upper middle area, select a terminal view type.
Choose PC or mobile view so the process works best on each device.
3.
- Drag one single-line text widget, two date and time widgets, and one multi-line text widget from **Data Widgets** to the canvas, and set the widget properties, as shown in [Figure 4-10](#).

Figure 4-10 Designing a form



This example uses single-line text, date and time, and multi-line text widgets. For details about other widgets, see [Setting Form Widget Properties](#).

Table 4-3 Widgets in a form

Widget	Description	Example
Single-line text	A widget for short text or numbers like names, license plate numbers, postal code, addresses, or ID numbers.	Trip location
Time and date	A widget for time or date like trip dates, current or custom.	Start time End time

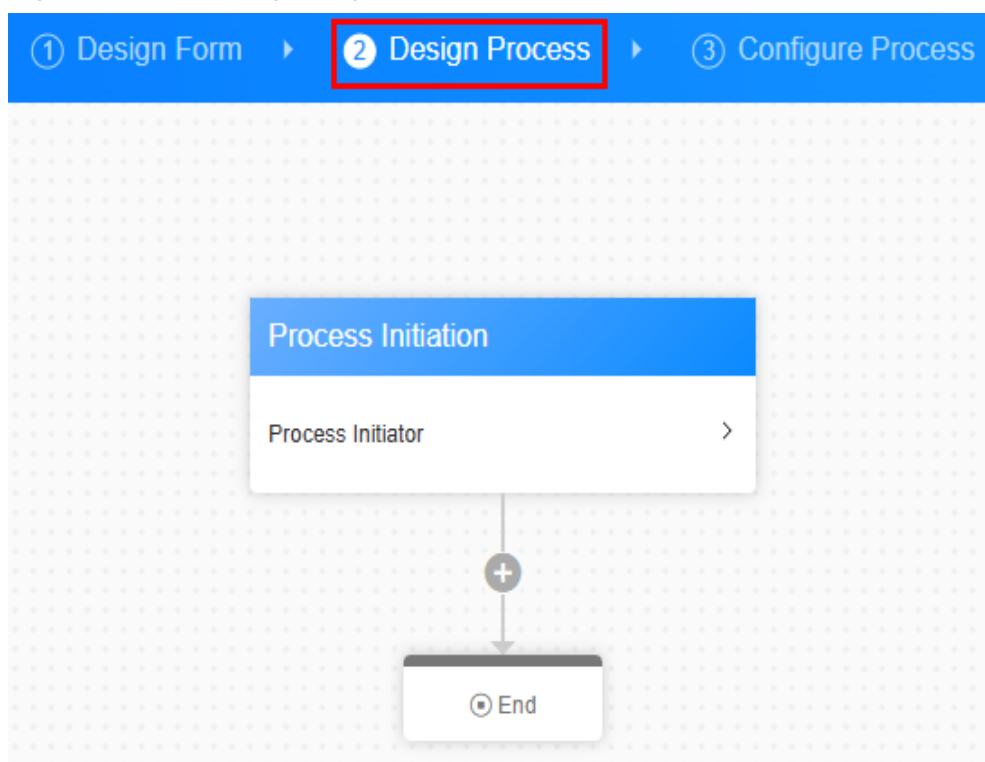
Widget	Description	Example
Multi-line text	A widget for long text like descriptions, notes, or feedback.	Trip description

Step 5 Design a process.

The following shows how to design a trip request process. For more designs, see [Setting Process Widget Properties](#).

1. At the top of the page, click **Design Process**.

Figure 4-11 Selecting Design Process




2. Click , select the **Approval** node, set its parameters by referring to [Table 4-4](#), and leave the rest as default.

Figure 4-12 Setting the Approval node

Process Initiation

Process Initiator

>

+

Approval

User: xxx

>

+

End

End

Configure Approval

Basic Settings

Permissions

Advanced

Approver

+ Add

xxx

☐ CC Approval Result

For notification management, go to [Configure Process - Process Notifications](#) to set it up.

Approval Method (Multi-Approver)

☒ OR Sign: Any one approver can pass or reject

☐ AND Sign: Requires all approvers to participate

Title

Please approve it

+

Action

Approve

Enabled

▼

Reject

Enabled

▼

Save Draft

Disabled

▼

Figure 4-13 Setting node buttons

Action

Approve Enabled ▲

Switch Button

☒

Name

Approve

Other

☒ Comments

☐ Mandatory

Reject Enabled ▲

Switch Button

☒

Name

Reject

Other

☒ Comments

☐ Mandatory

Save Draft Enabled ▲

Switch Button

☒

Name

Draft

Figure 4-14 Button name displayed on the process initiation page

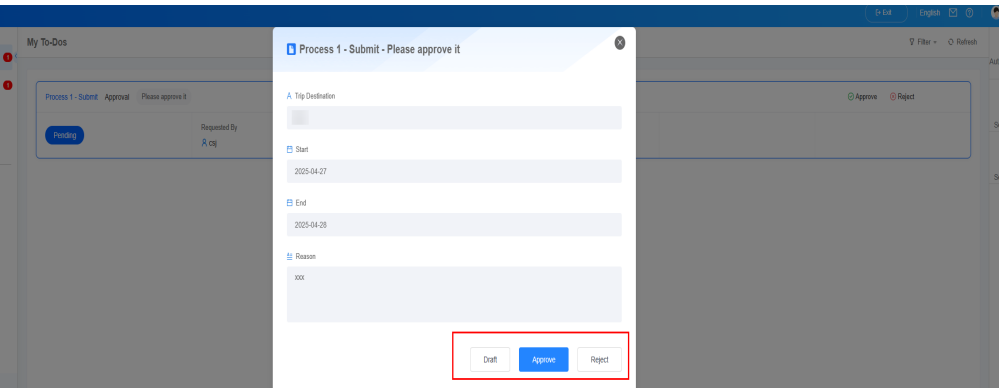


Table 4-4 Approval node parameters

Parameter	Description
Approver	<p>Set the approver of the process. By default, the process initiator is the approver. You can add approvers as follows:</p> <ul style="list-style-type: none">– By member: Choose one or more members as approvers. The approver added must be created in the configuration center first. For details, see Adding Users to a System-Level Role.– By role: Choose approvers by role, including preset and custom roles. See Customizing a System-Level Role to customize a role.– Dynamic approver: Select the process initiator or form field as the approver. The form must contain one or more user widgets. <p>If you select CC Approval Result, the outcome (approved or rejected) will be sent to CC recipients.</p>
Approval Method (Multi-Approver)	<p>If multiple approvers are selected, set the approval method.</p> <ul style="list-style-type: none">– Any assignees: The process will go to next task if any approver finishes the approval.– All assignees: The process will go to next task only when all approvers finish the approval.
Title	Title of the approval page (up to 255 characters).

Parameter	Description
Buttons	<p>Set the button name on the approval page. Figure 4-14 shows the effect.</p> <ul style="list-style-type: none"> – Approve: A button for approving an application. <ul style="list-style-type: none"> ▪ Switch button: Enable or disable the button (enabled by default). ▪ Name: Set the button text for approval (default is Approve). ▪ Other > Comments: If checked, you need to enter comments when you approve. ▪ Other > Mandatory: Make comments required (unchecked by default). – Reject: A button for rejecting an application. <ul style="list-style-type: none"> ▪ Switch button: Enable or disable the button (enabled by default). ▪ Name: Set the button text for rejection (default is Reject). ▪ Other > Comments: If checked, you need to enter the rejection reasons. ▪ Other > Mandatory: Make the rejection reasons required (unchecked by default). – Save Draft: A button for saving form data temporarily. <ul style="list-style-type: none"> ▪ Switch button: Enable or disable the button (disabled by default). After the temporary storage function is enabled, you can click Save Draft to store your form data temporarily. ▪ Name: Set the button text for temporarily saving data in a form (default is "Save Draft").


- Click , select the **CC** node, set the CC recipient, and click the save button.
In this example, the process goes to the CC recipient only if the approver approves. If the approver rejects, the process ends.

Figure 4-15 Configuring the CC node

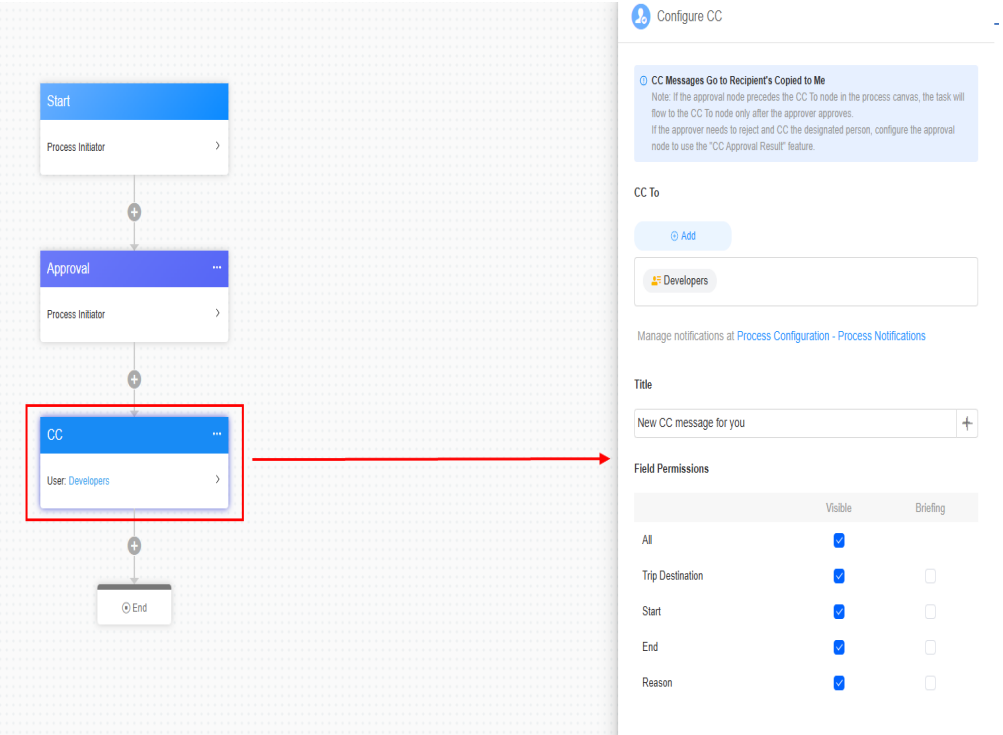


Table 4-5 Parameters of the CC node

Parameter	Description
CC To	CC recipient. The default value is the process initiator. You can add a user or dynamic approver (process initiator or a reference field in the form) as the CC recipient.
Title	The title can contain a maximum of 85 characters. Click + to add variables to the title.
Field Permissions	Set which fields the CC recipient can see. By default, all fields are visible.

Step 6 In the upper part of the page, click **Configure Process** and set **Process Notifications** and **Process Cancellation**.

Figure 4-16 Process notification and cancellation

① Design Form ▶ ② Design Process ▶ ③ Configure Process

Process Notifications

☒ Send By Email

Receive Node: All

☐ Send by WeCom

☐ Send by WeLink

Process Cancellation

☒ Allow initiator to cancel

Not allowed after passing these nodes: Approval

Versions

Selected	Version	Process Name	Last Modified By	Last Modified
<input checked="" type="checkbox"/>	1	Process - Submit	xcm	2025-03-09 10:45:47

Table 4-6 Process configuration parameters

Parameter	Description
Send by Email	Send key information of each node to its owner via email.
Send by WeCom	Send key information of each node to its owner via WeCom. Before using this method, ensure that WeCom has been bound by choosing Environment Configuration > Configuration > Integrated Connection > Identity Authentication.
Send by WeLink	Send key information of each node to its owner via WeLink. Before using this method, ensure that WeLink has been bound by choosing Environment Configuration > Configuration > Integrated Connection > Identity Authentication. Ensure that the sender and recipient are WeLink users.

Parameter	Description
Recipients	Specify the node that receives notifications. <ul style="list-style-type: none">• All• Approval• CC To• Fill-In
Allow initiator to cancel	Whether the process initiator can cancel the process after it starts.
Not allowed after passing these nodes	Once the process reaches a certain node, the process initiator cannot cancel the process. For example, in a trip request, the request cannot be canceled after it is approved on the Approval node.

Step 7 Click **Save** in the upper right corner of the page.

Step 8 Click **Closed** in the upper right corner to publish the process.

After publishing, the system shows a success message. If not, when you start the process, a message will appear saying that the process is disabled. Contact the administrator to enable it.

Step 9 Verify the trip request process.


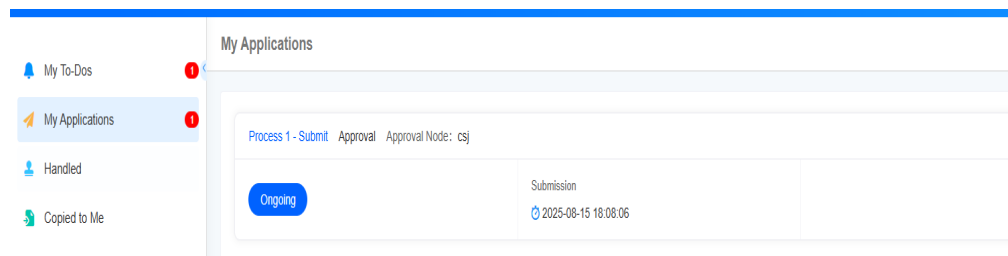
1. Click  in the upper left corner to return to the development page of the trip request.
In an application, four processes are displayed: **My To-Dos**, **My Applications**, **Handled**, and **Copied to Me**.
2. In the new "Process 1 - Initiate Process", fill in the trip request and submit it.
After submitting the request, you can see it on **My Applications** with a pending status.

Figure 4-17 Viewing the submitted request



3. Log in as an approver, go to **Task Center > My To-Dos**, and click the target request to approve it.

Figure 4-18 Viewing the request on the workbench

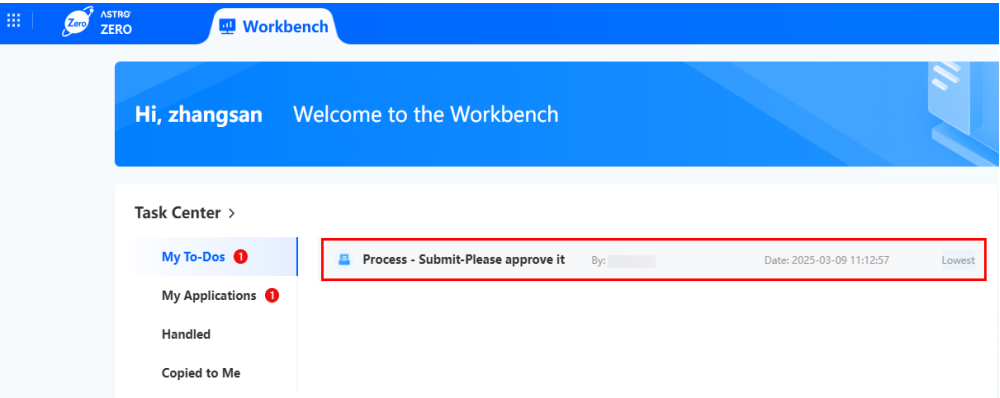
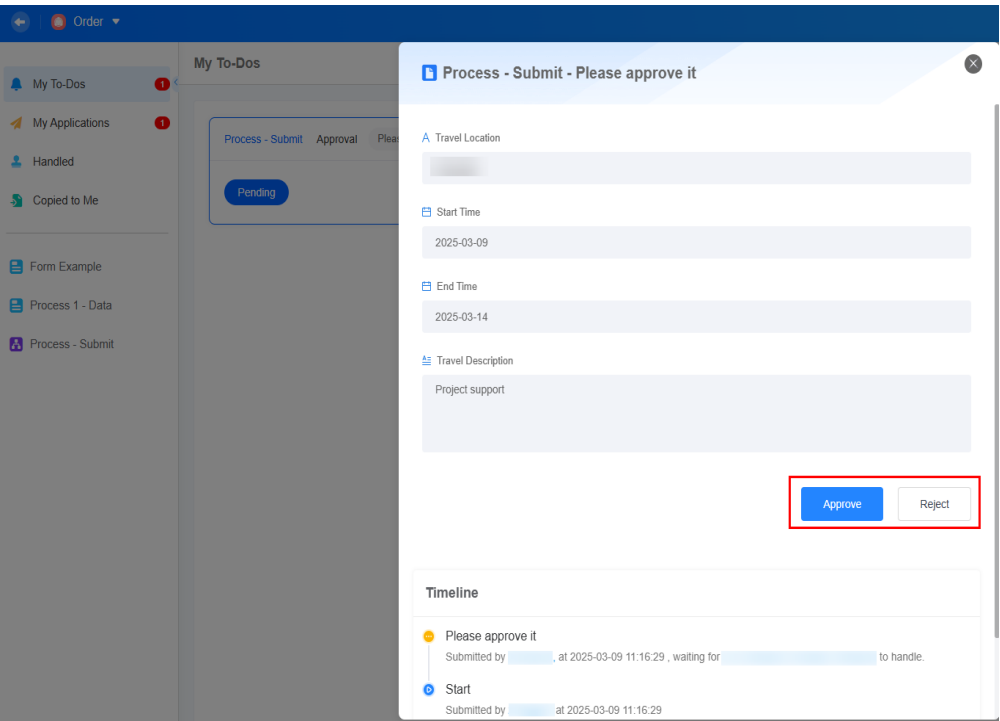
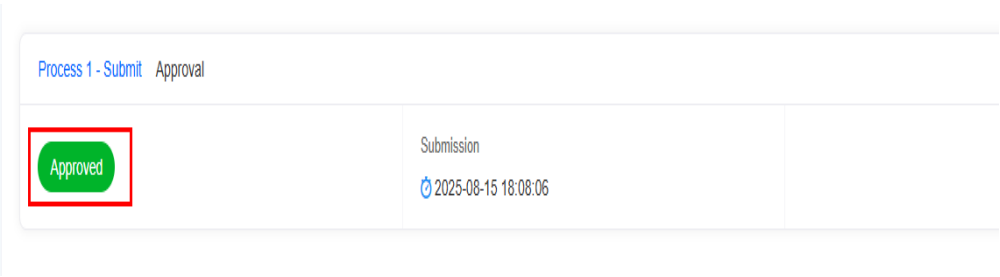


Figure 4-19 Approving the request



4.
- Switch to the applicant account and check the request status again. The request is approved.

Figure 4-20 Viewing the approval result



----End

4.4 Creating an External Link

Create external links to add external pages into no-code applications. This enhances applications functionality.

Prerequisites

You have created a no-code application. If not, see [Creating a No-Code Application](#).

Creating an External Link on PCs

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** In the navigation pane, click **Create** and choose **Create External Link**.
- Step 4** Set the external link information.

Figure 4-21 Creating an external link

Create Url ×

* Page Name

Help Document

* Url

https

☐ Open Method - Open in New Page

☐ Hide on PC ☐ Hide on mobile

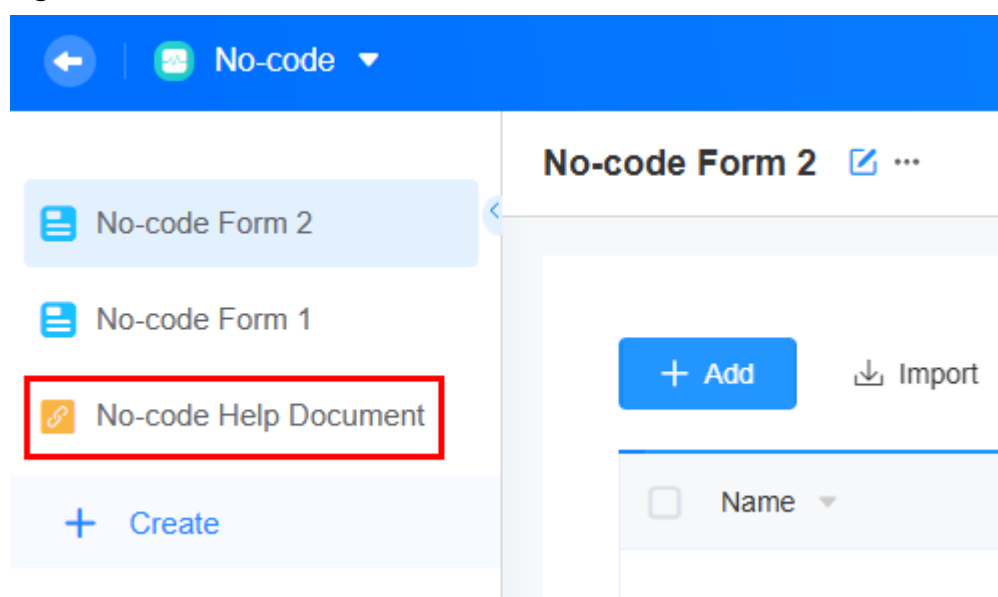
Cancel OK

Table 4-7 Parameters for creating an external link

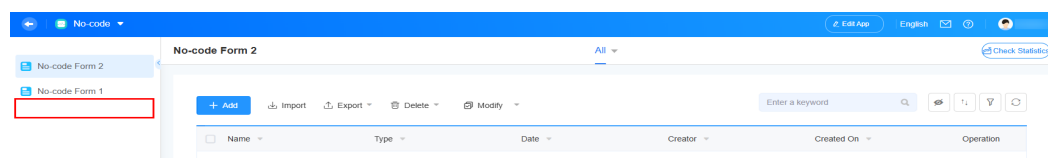
Parameter	Description
Page Name	Name of the added external page in the no-code application.
URL	URL of the external page to be added. The URL must start with http:// , https:// , or ftp:// .
Open Method - Open in New Page	Choose to open the external page in the application or a new window.
Hide on PC	If checked, the external link is hidden on PCs.
Hide on mobile	If checked, the external link is hidden on mobile devices.

Step 5 Click **OK**.

In the form list on the left, you can view the created external link. You can click the link to go to the corresponding page.

Figure 4-22 External link address

If you check **Hide on PC**, the link will not show on the application page.


Figure 4-23 Hiding the external link

----End

Creating an External Link on Mobile Devices

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 Click  in the lower right corner of the application page.


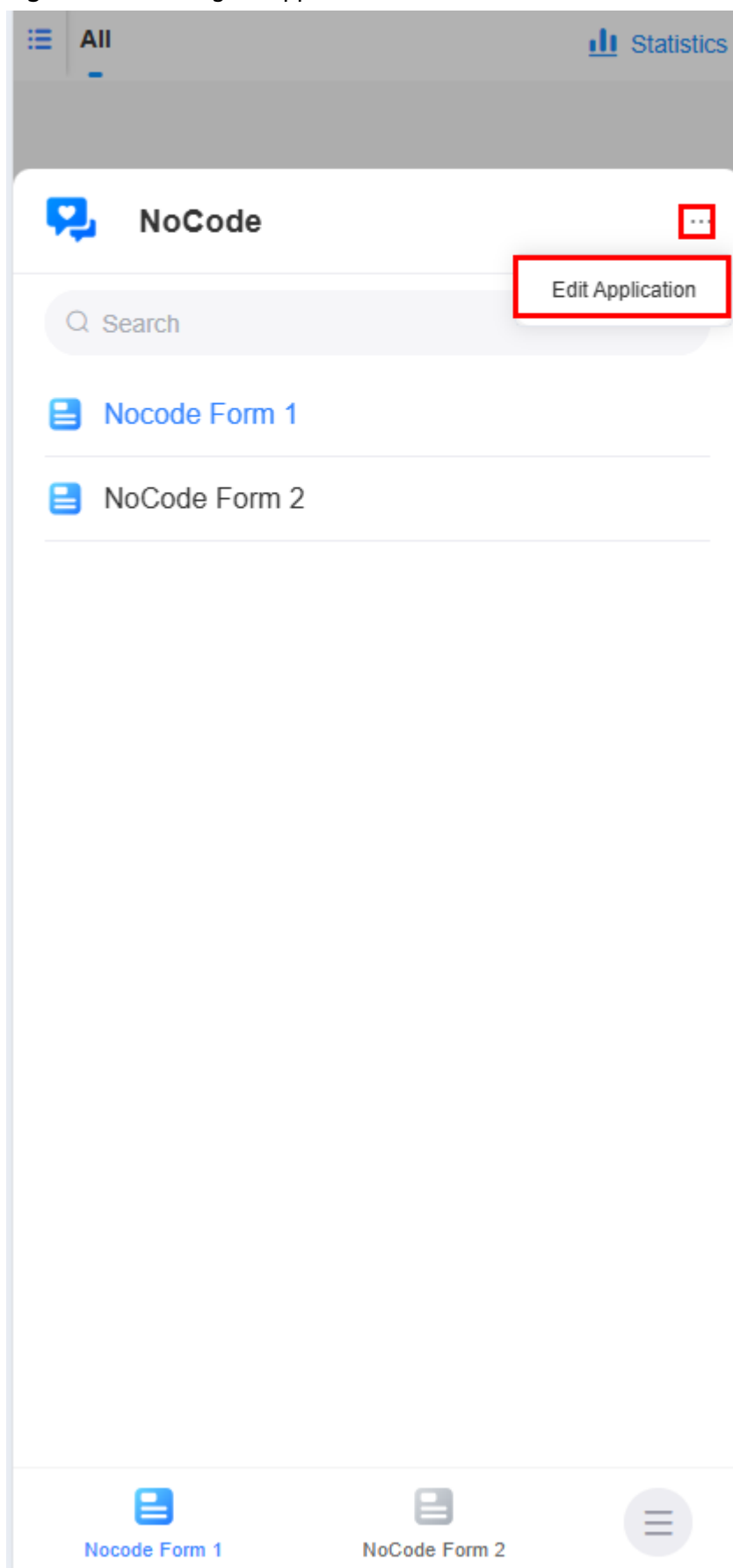
Step 4 On the displayed page, tap  and tap the edit button.

Figure 4-24 Editing an application



- Step 5** On the navigation settings tab page, tap the create button to create an external link.

Figure 4-25 Creating an external link



Step 6 Set the external link information.

Figure 4-26 Creating an external link

Create Url

* Page Name

Help Document

* Url

https

☐ Open Method - Open in New Page

☐ Hide on PC ☐ Hide on mobile

Cancel

OK

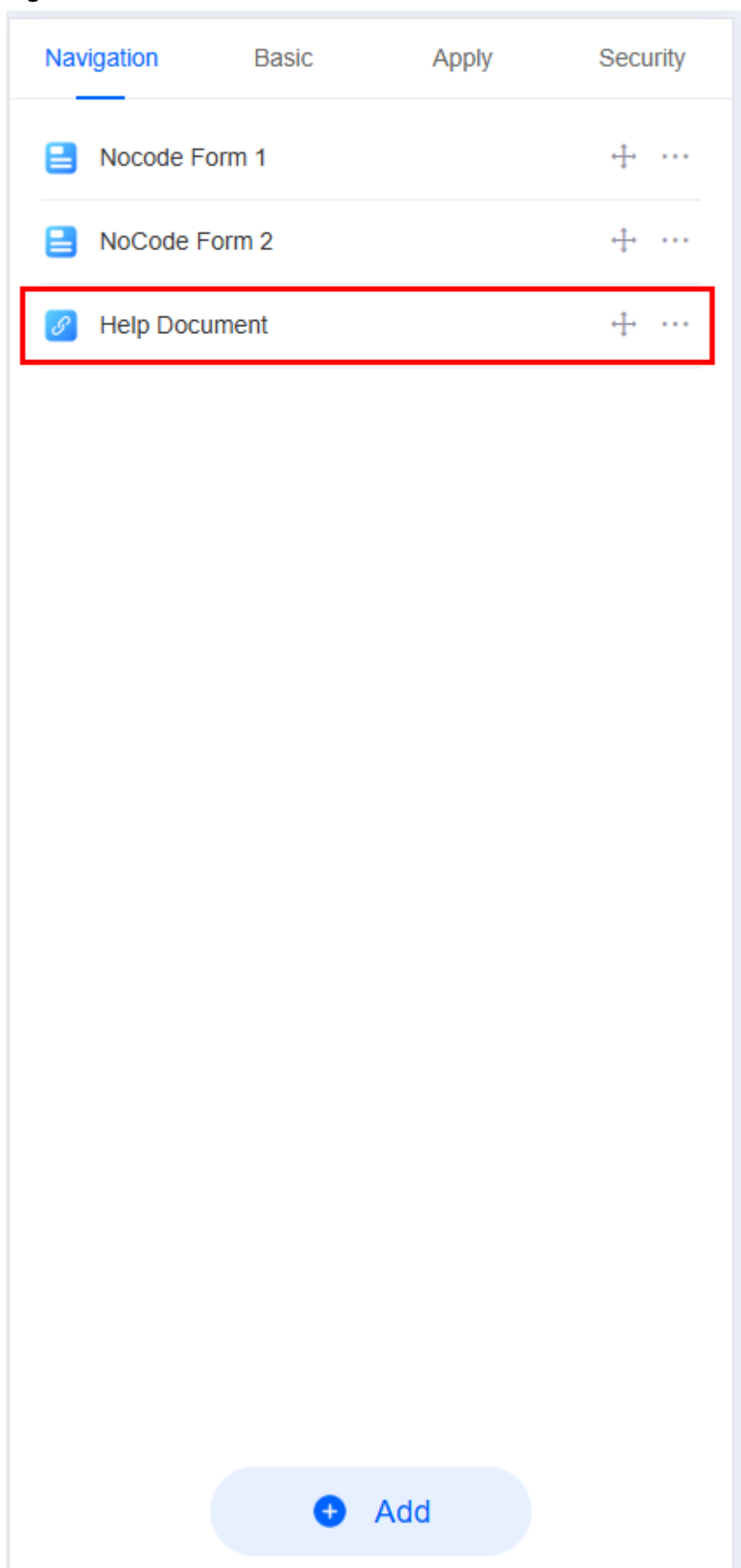
Table 4-8 Parameters for creating an external link

Parameter	Description
Page Name	Name of the added external page in the no-code application.
URL	URL of the external page to be added. The URL must start with http:// , https:// , or ftp:// .
Open Method - Open in New Page	Choose to open the external page in the application or a new window.
Hide on PC	If checked, the external link is hidden on PCs.
Hide on mobile	If checked, the external link is hidden on mobile devices.

Step 7 Confirm the settings.

In the navigation settings, you can view the created external link. You can tap the link to go to the corresponding page.

Figure 4-27 External link address



4.5 Adding Widgets For a Form

Widget Categories

There are data widgets and common widgets. For details, see [Table 4-9](#).

Table 4-9 Preset widget categories

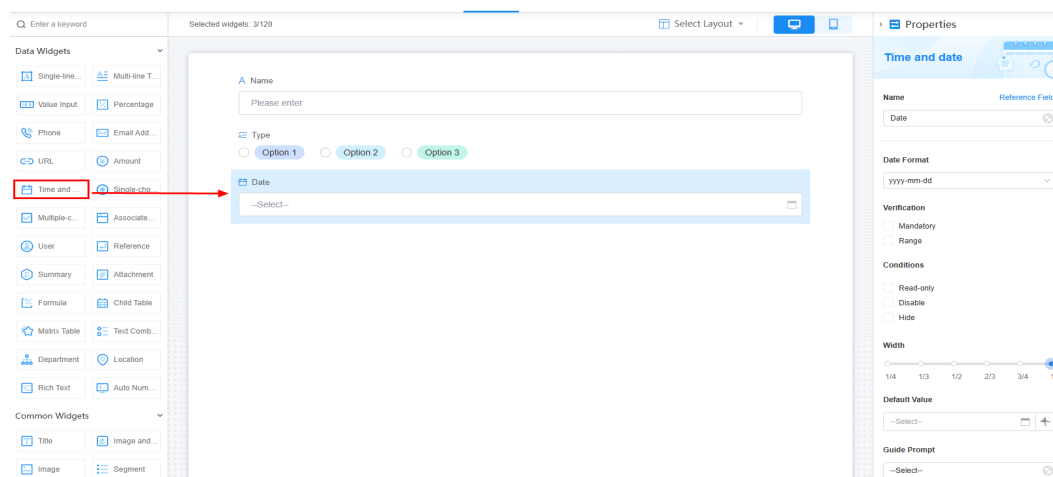
Widget Category	Name	Description
Data widgets	Single-line text	This widget is for short text or numbers like names, license plate numbers, postal code, addresses, or ID numbers.
	Multi-line text	This widget is for long text. Press Enter to start a new line. Text shows in sections. Enter descriptions, notes, or feedback using this widget.
	Value input	This widget records numbers, like quantity, age, inventory, or amounts. It can handle up to 15 digits. If the number is too long, the system will add separators. For numbers over 15 digits, use the text widget.
	Percentage	This widget records ratios. By default, a percent sign (%) is added to the end of the number entered.
	Phone	This widget records 11-digit mobile numbers. The platform checks mobile numbers. If one is invalid, it shows an error.
	Email Address	This widget records email information. The platform checks email addresses. If one is invalid, it shows an error. Example format: ***@example.com.
	URL	This widget records URL information. The platform checks URLs. If one is invalid, it shows an error.
	Amount	This widget records amounts.

Widget Category	Name	Description
	Time and date	This widget records time information. The platform can automatically obtain the current time or you can customize the time.
	Single-choice	This widget lets you pick an option from a list, like choosing a gender.
	Multi-choice	This widget lets you pick one or more options from a list, like choosing hobbies.
	Associated record	<p>This widget links forms in an application and shows them in single or multi-answer mode.</p> <p>For example, in a meal ordering application, the package selection field is linked to the meal options on another page, so you can pick a meal.</p> <p>When you export or clone an application, the form links break. You need to set them up again afterward.</p>
	User	<p>This widget gets people's information from a company contact list.</p> <p>You can use it to set the travel applicant, asset owner, maintenance personnel, and approver for a process form.</p>
	Reference	This widget shows a field from a linked record on the current page. Before using this widget, ensure that the associated record widget has been used on the page.
	Summary	<p>This widget shows the total number of fields or records in forms related to this one.</p> <p>To use this widget, link another form to the current form using the associated record widget. This allows you to summarize records from the linked form.</p>
	Attachment	This widget is for uploading attachments, such as certificate photos. You can upload by clicking or dragging an attachment.
	Formula	This widget calculates the fields in a record.

Widget Category	Name	Description
	Child table	This widget nests other forms within the current form as child tables.
	Matrix table	The widget is used to visually assess the degree of preference for something.
	Text combination	This widget combines fields in the current form in a certain format.
	Department	This widget obtains organizations.
	Location	This widget is used to obtain the current location. It is only available on mobile devices.
	Rich text	This widget is used to input text and supports text and images.
	Auto numbering	This widget automatically generates a number in a custom format for each record.
Common widgets	Title	This widget is used to display the page title.
	Image and text	This is a web widget that can display rich texts.
	Image	This widget is used to display images on pages.
	Segment	This widget is usually used to describe the following part, or divide the form into different parts to make the structure clearer.

Adding Widgets to a Form

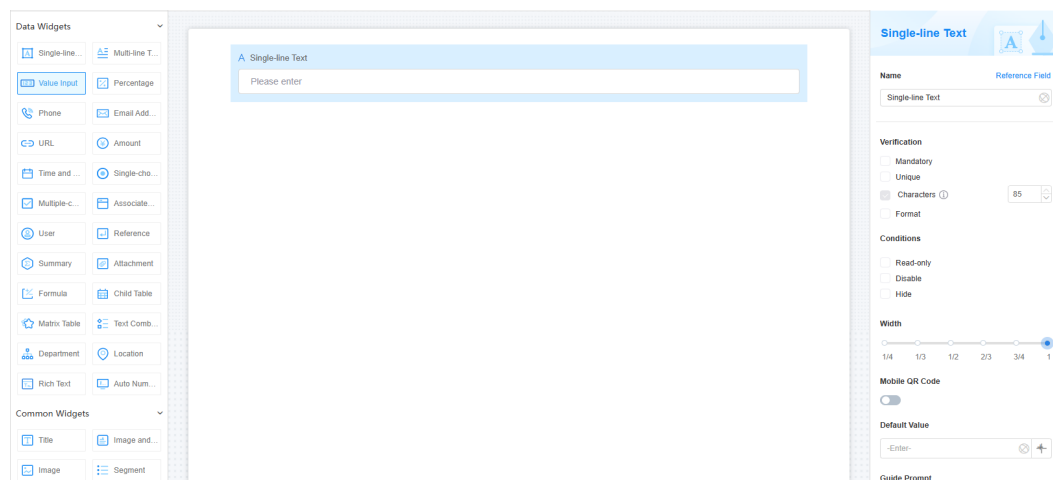
A form collects user data. You can create multiple forms in a no-code application. Each form is for a data type. Multiple forms form an application. When designing a form, drag a widget from the left widget area to the middle design area based on the field data type. Essentially, you can arrange widgets to create the form.

Figure 4-28 Adding widgets to a form

4.6 Setting Form Widget Properties

4.6.1 Setting the Properties of the Single-Line Text Widget

This widget records short text or numbers like names, license plate numbers, postal code, addresses, or ID numbers.

Figure 4-29 Single-line text widget

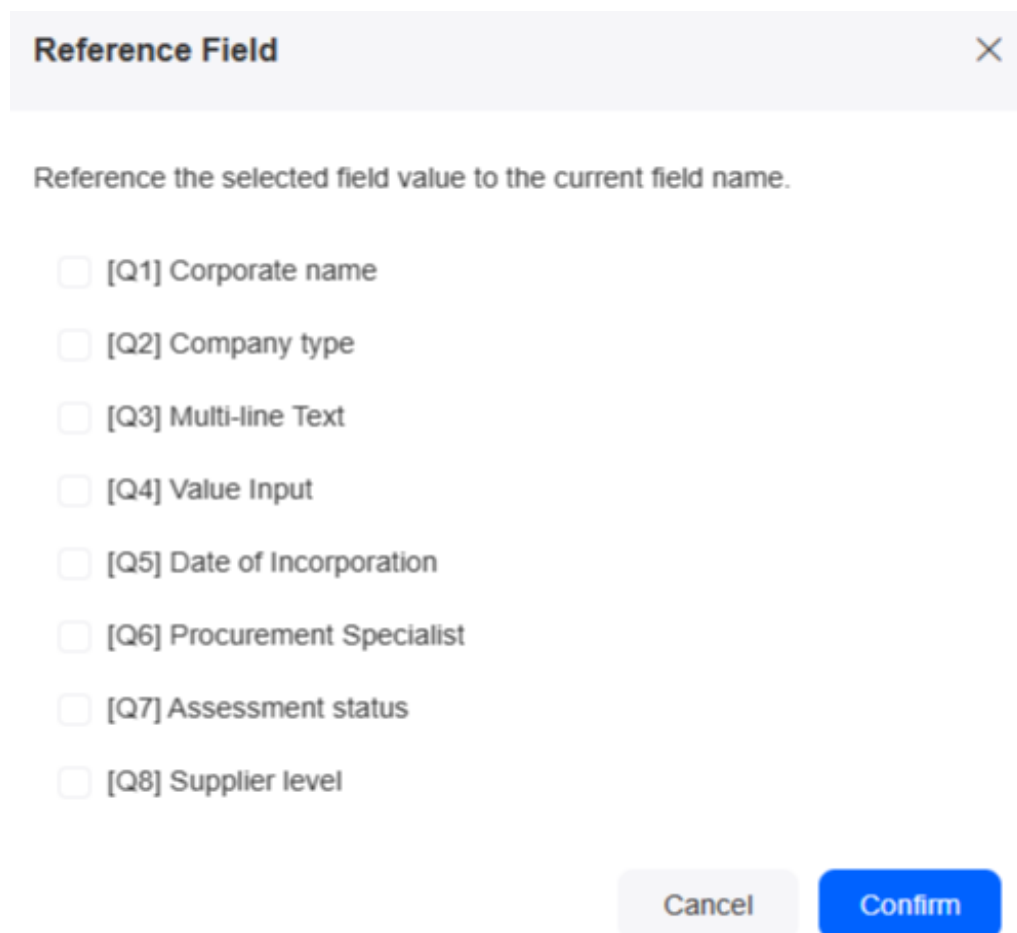
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-30 Setting the field name (Chinese and English)



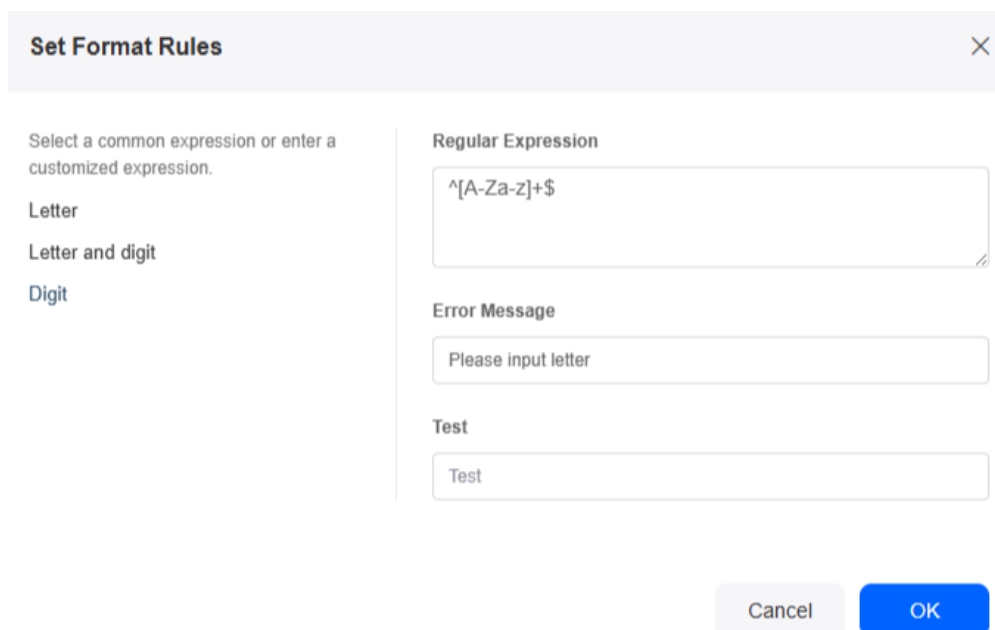
Figure 4-31 Field reference



Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Unique:** If checked, the field value cannot be repeated.
- **Characters:** Set the max. number of characters (up to 85).
- **Format:** If checked, choose input format (**Letter**, **Letter and digit**, **Digit**). Each format has a preset regular expression for testing. Enter a value in the **Test** box to check the format; if invalid, an error message appears.

Figure 4-32 Restricting the input format

The 'Set Format Rules' dialog box is shown. It has a title bar with a close button. The main area is divided into two columns. The left column contains the text 'Select a common expression or enter a customized expression.' and three radio buttons: 'Letter', 'Letter and digit', and 'Digit'. The right column contains three input fields: 'Regular Expression' with the value '^[A-Za-z]+\$' and a copy icon, 'Error Message' with the value 'Please input letter', and 'Test' with the value 'Test'. At the bottom right are 'Cancel' and 'OK' buttons.

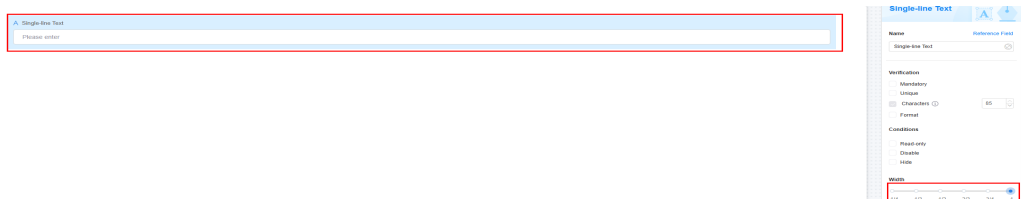
Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-33 Setting the widget width

- 1/4: Widget is 1/4 of the page width.

- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

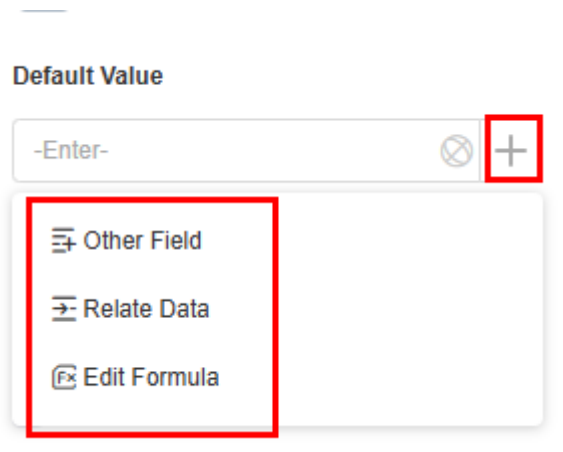
Mobile QR Code

If enabled, you can scan barcodes or QR codes to input text. For example, scanned text can fill the widget.

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-34 Setting the default value of a widget



- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-35 Setting the default value

Set Default Values

Associated Object

Form - form view

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Company

Cancel

Confirm

- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

Figure 4-36 Formula editing

Edit Formula

Edit a formula using mathematical operators.

Single-line Text =
SUM()

Current Form Field

Search

Company

Text

Functions

Search

Mathematical

SUM

AVG

MIN

MAX

PRODUCT

ABS

INT

Number

Number

Number

Number

Number

Number

Number

SUM

SUM is used to calculate the sum of multiple numbers
Usage: SUM(num1,num2,num3,...), deemed as 0 when the num is null
Example: SUM(6,7,8)
Result: 21

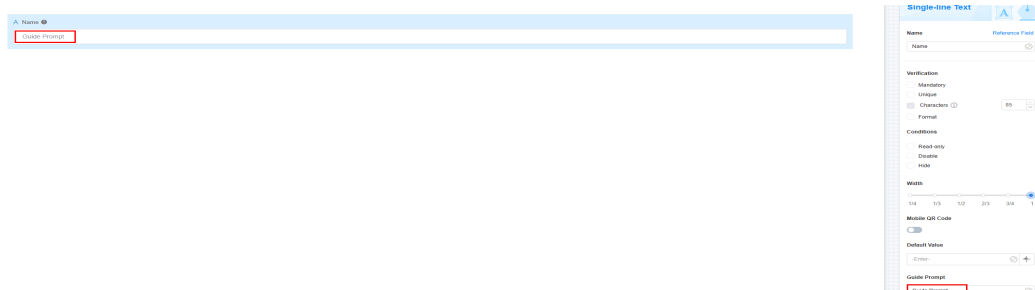
No

Yes

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-37 Setting the guide prompt

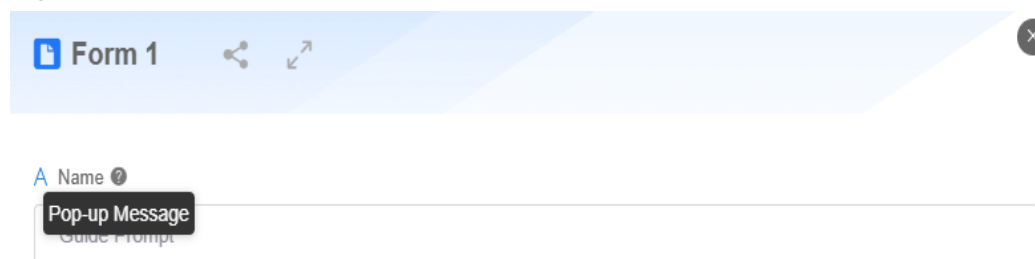


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

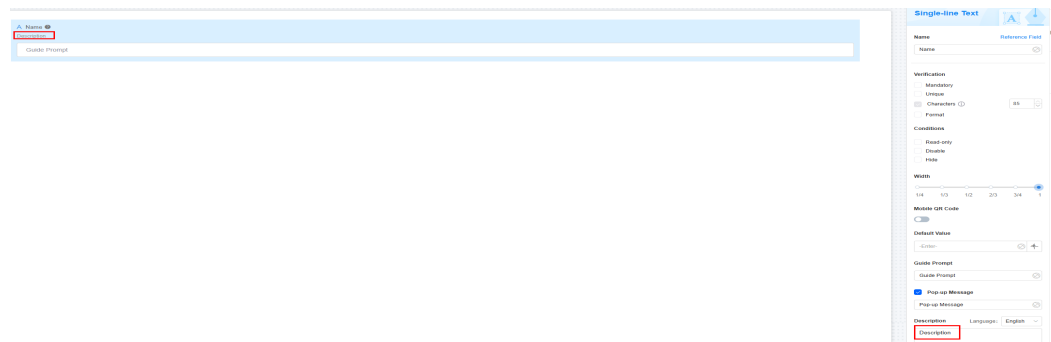
Figure 4-38 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

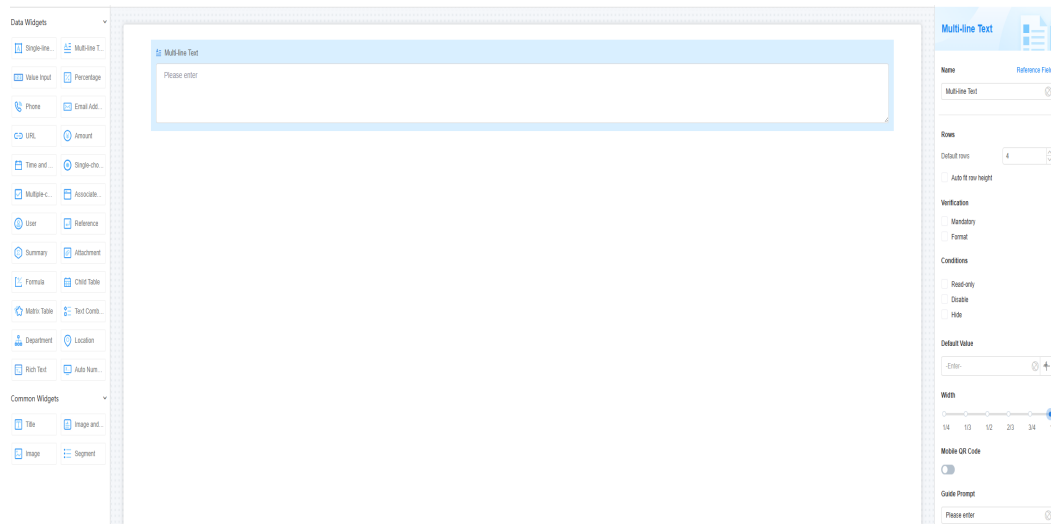
Figure 4-39 Effect



4.6.2 Setting the Properties of the Multi-Line Text Widget

This widget records long and complex text, such as description, remarks, and feedback.

Figure 4-40 Multi-line text widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-41 Setting the field name (Chinese and English)



Figure 4-42 Field reference

Reference Field

Reference the selected field value to the current field name.

☐

[Q1] Corporate name

☐

[Q2] Company type

☐

[Q3] Multi-line Text

☐

[Q4] Value Input

☐

[Q5] Date of Incorporation

☐

[Q6] Procurement Specialist

☐

[Q7] Assessment status

☐

[Q8] Supplier level

Cancel

Confirm

Rows

Set the number of rows for text (default is 4). Choose **Auto fit row height** to adjust rows based on content.

For example, if set to **3**, only three rows show on the form. If you type more, scroll to see the rest.

Figure 4-43 Text with more than three rows

[illegible]

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Format:** If checked, choose input format (**Letter**, **Letter and digit**, **Digit**). Each format has a preset regular expression for testing. Enter a value in the **Test** box to check the format; if invalid, an error message appears.

Figure 4-44 Restricting the input format

Set Format Rules ✕

Select a common expression or enter a customized expression.

Letter
Letter and digit
Digit

Regular Expression

^[A-Za-z]+\$

Error Message

Please input letter

Test

Test

Cancel OK

Conditions

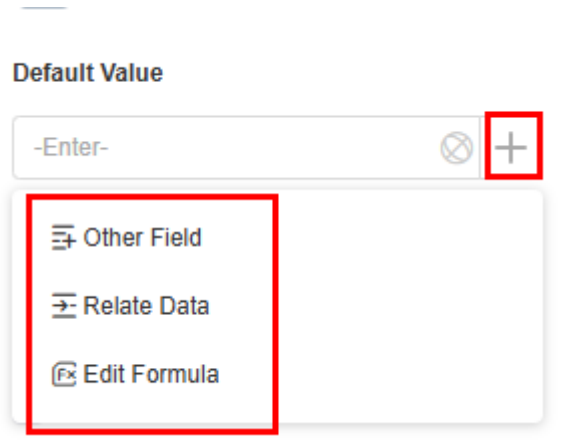
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Default Value

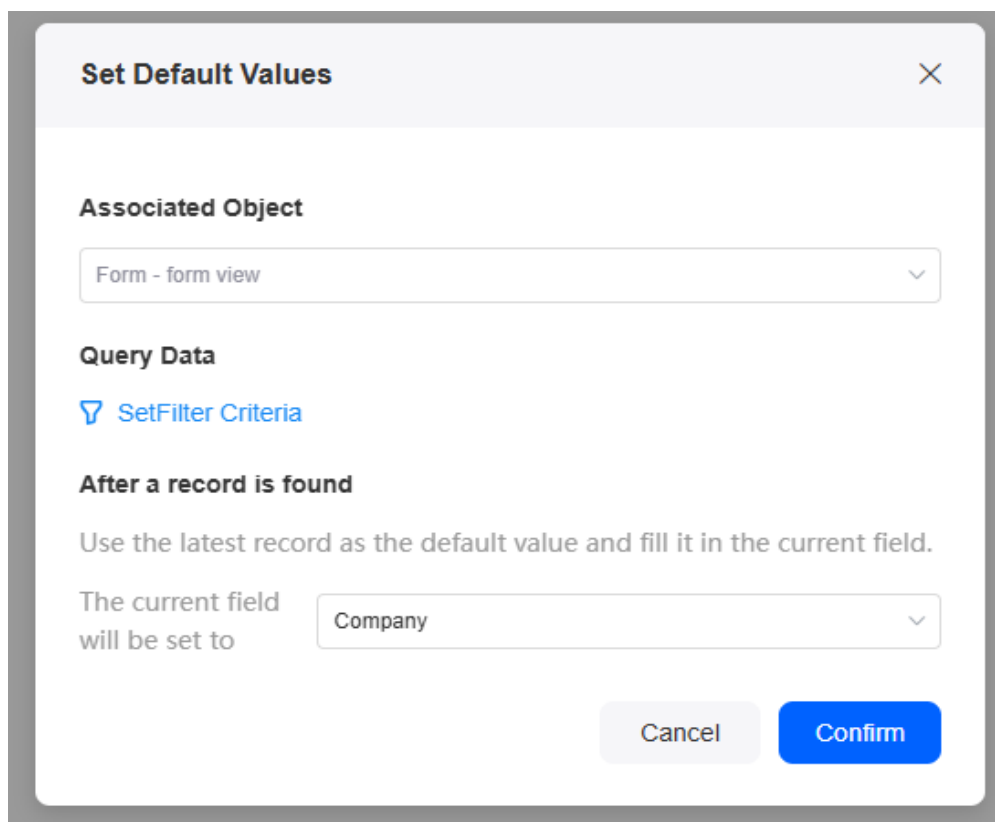
Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-45 Setting the default value of a widget



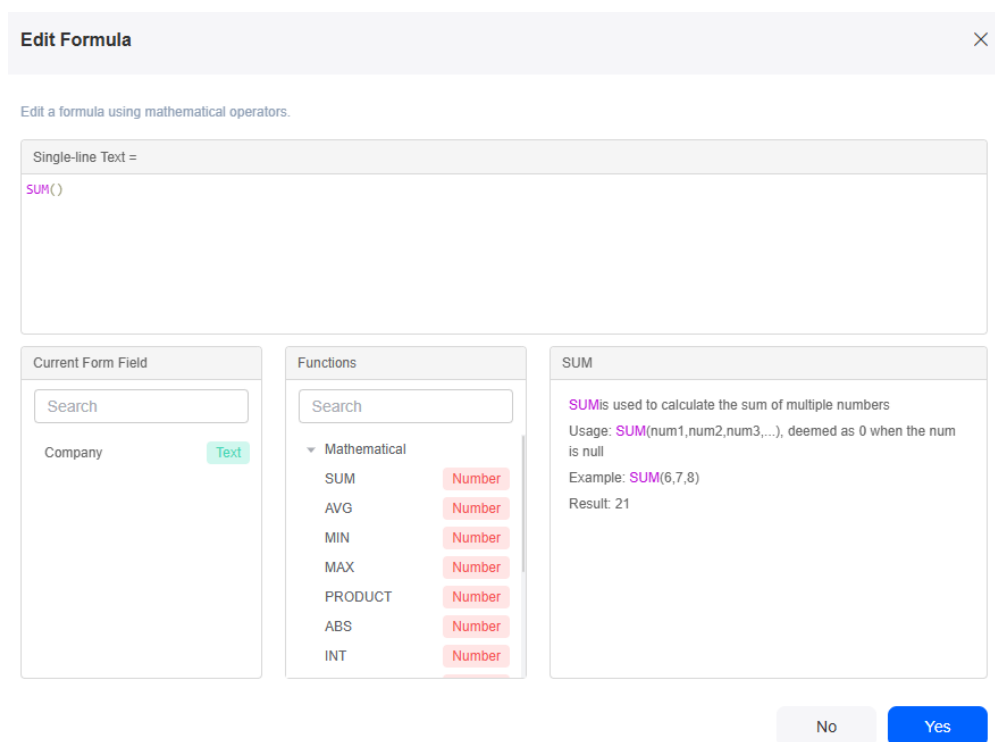
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-46 Setting the default value



- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

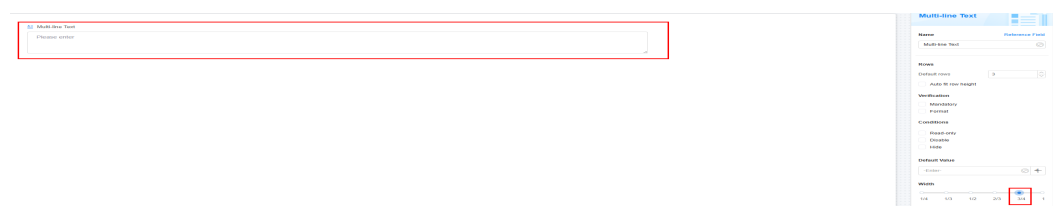
Figure 4-47 Formula editing



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-48 Setting the widget width



- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

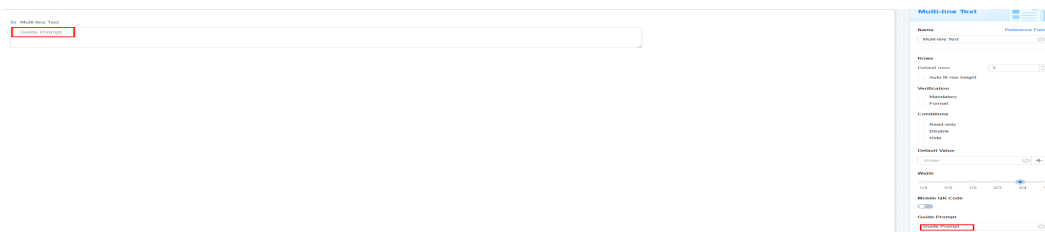
Mobile QR Code

If enabled, you can scan barcodes or QR codes to input text. For example, scanned text can fill the widget.

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-49 Setting the guide prompt

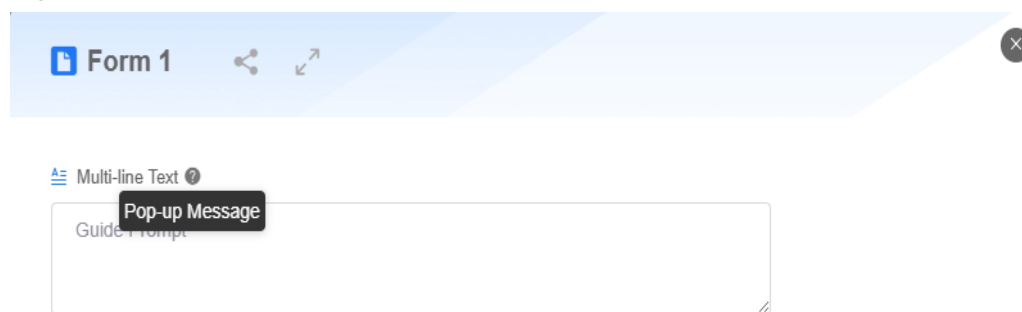


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

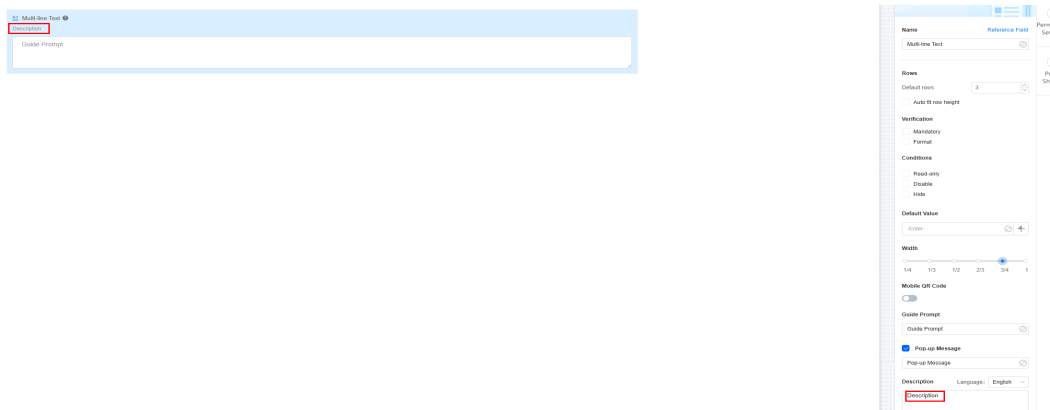
Figure 4-50 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-51 Effect

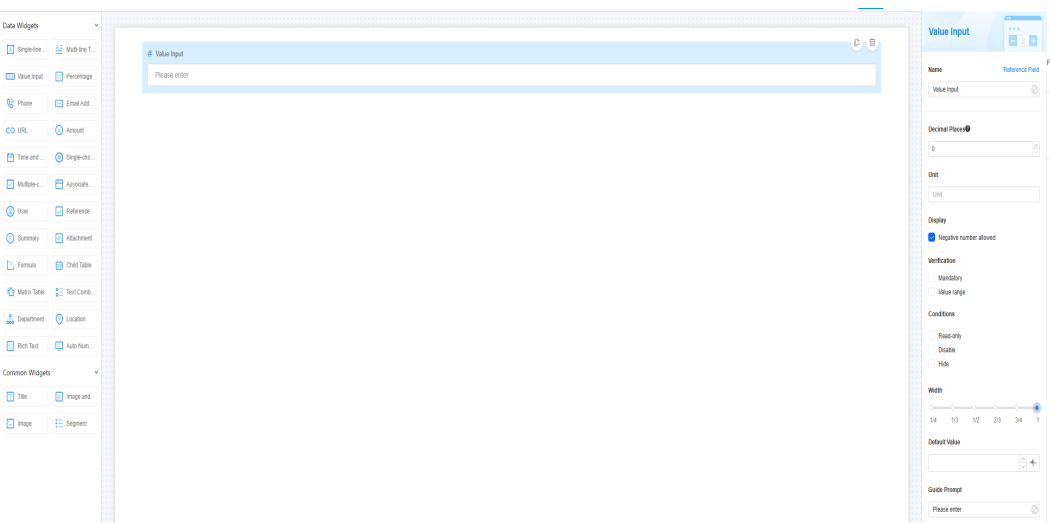


4.6.3 Setting the Properties of the Value Input Widget

This widget records numbers, like quantity, age, inventory, or amounts. It can handle up to 15 digits. If the number is too long, the system will add separators.

For numbers over 15 digits, use the text widget.

Figure 4-52 Value input widget



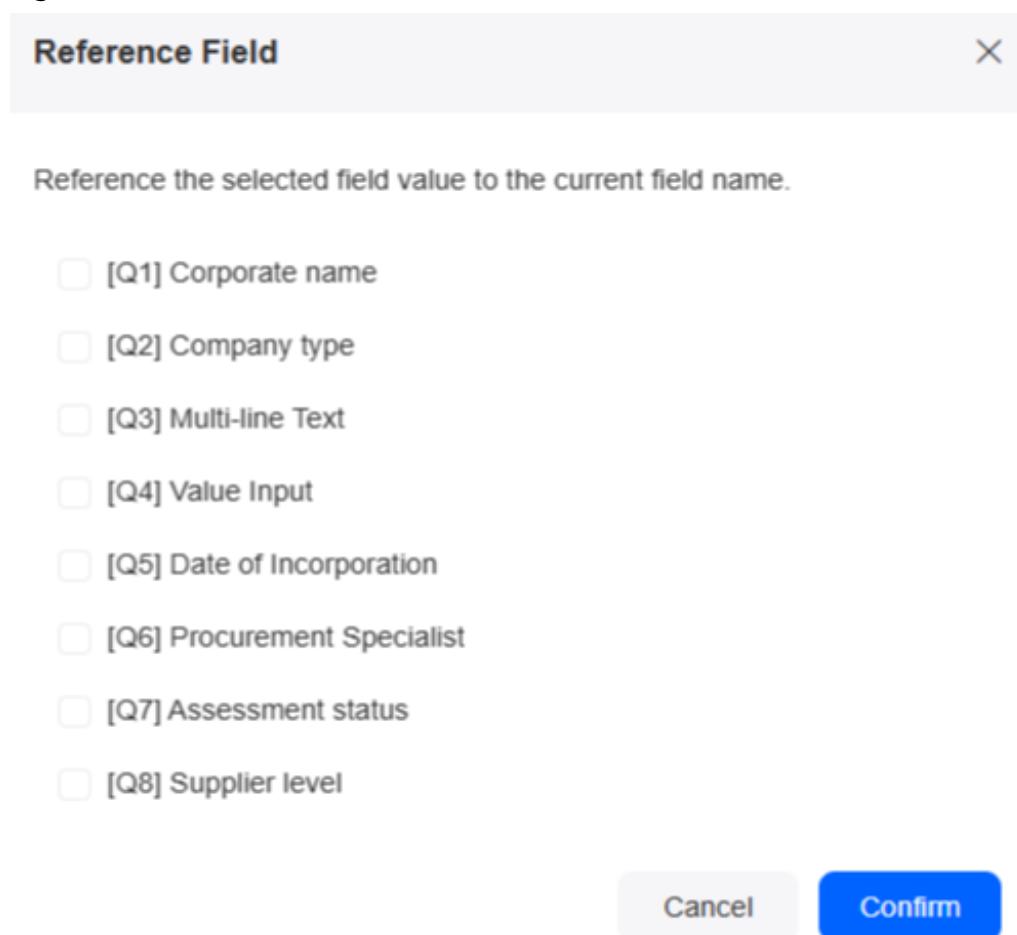
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-53 Setting the field name (Chinese and English)



Figure 4-54 Field reference

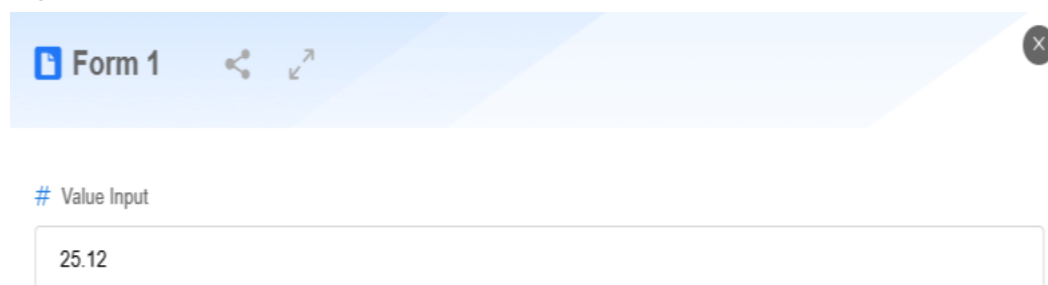


Decimal Places

Set how many decimal places to keep. It starts at **0** by default, which works well for entering amounts. After you save the form, you can only increase the number of decimal places.

If you choose **2** decimal places, it will keep just 2. If you type more than that, the platform will round the number automatically.

Figure 4-55 Effect

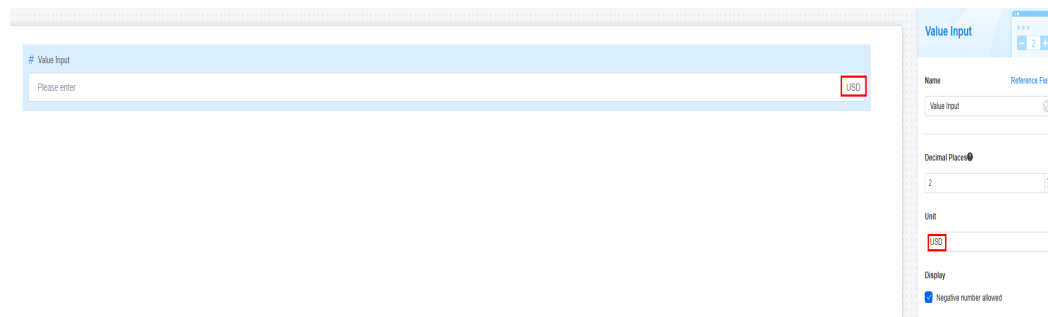


The image shows a form titled 'Form 1' with a 'Value Input' widget. The widget contains the text '25.12'. Above the widget is a label '# Value Input'. The form has a light blue header bar with a close button in the top right corner.

Unit

Set this based on what you need. For example: dollars or pages.

Figure 4-56 Setting the widget unit

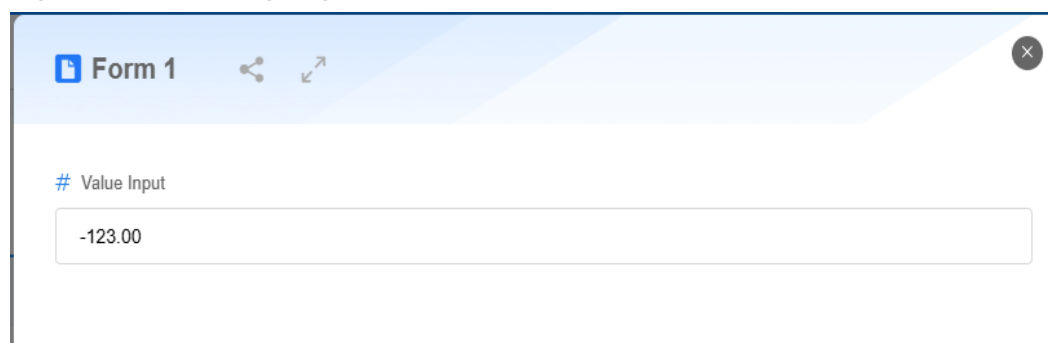


The image shows a form titled 'Form 1' with a 'Value Input' widget. The widget contains the text 'Please enter'. To the right of the widget is a configuration panel for the 'Value Input' widget. The panel has a 'Name' field with the value 'Value Input'. Below it is a 'Decimal Places' field with the value '2'. Below that is a 'Unit' field with the value 'USD'. At the bottom is a 'Display' section with a checkbox 'Negative number allowed' which is checked. The 'Unit' field is highlighted with a red box.

Display

Negative numbers are allowed by default. For example, you can enter -123.

Figure 4-57 Entering negative numbers



The image shows a form titled 'Form 1' with a 'Value Input' widget. The widget contains the text '-123.00'. Above the widget is a label '# Value Input'. The form has a light blue header bar with a close button in the top right corner.

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- Set the value range, like 10.01 to 1000.99, to keep the data accurate.

Conditions

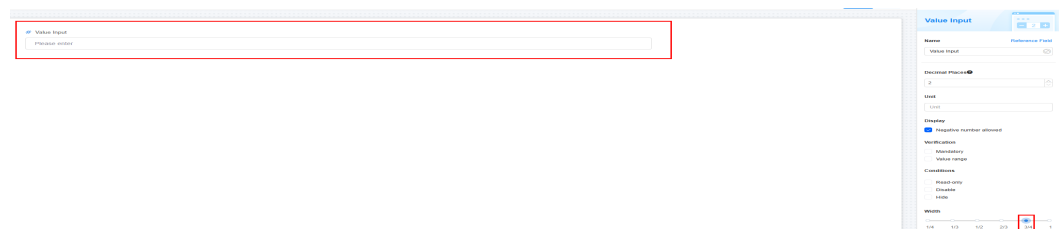
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-58 Setting the widget width

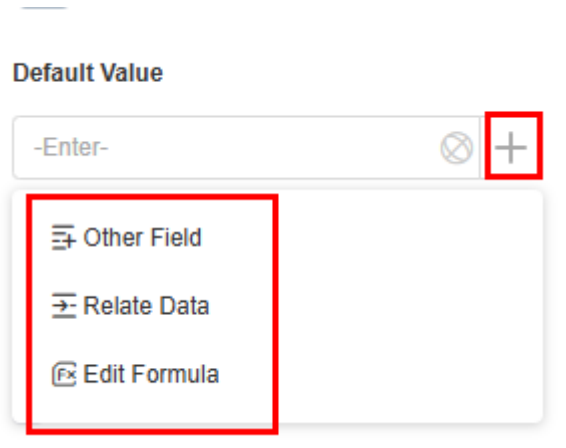


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

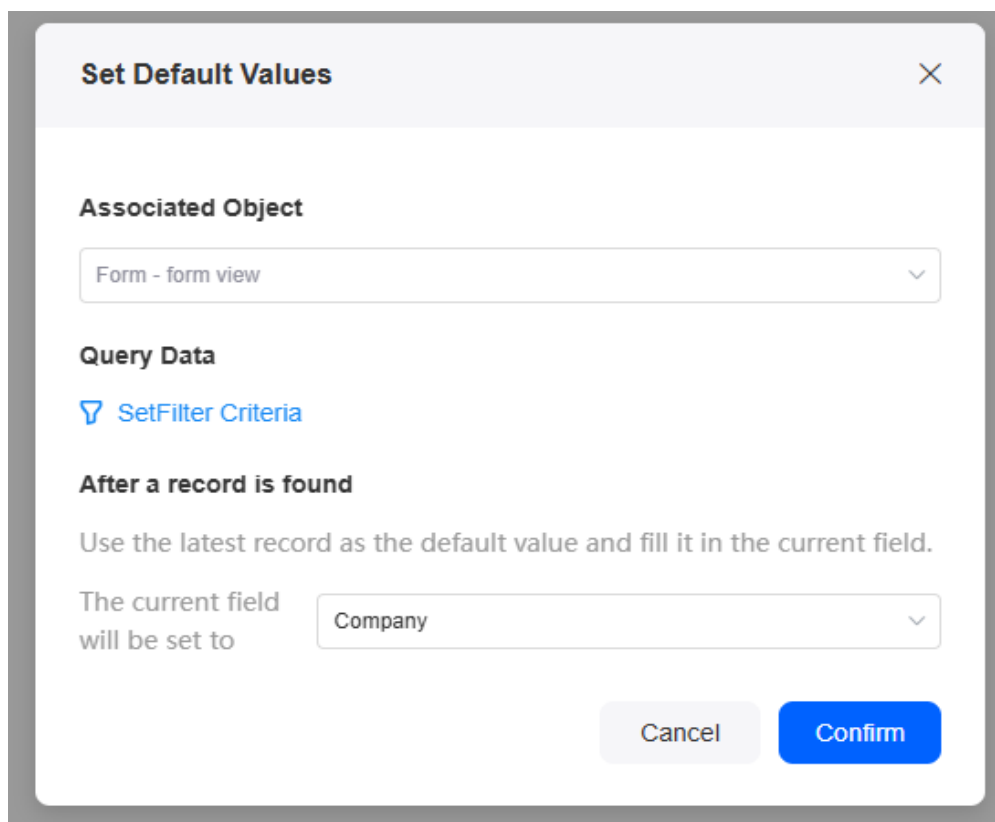
Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-59 Setting the default value of a widget



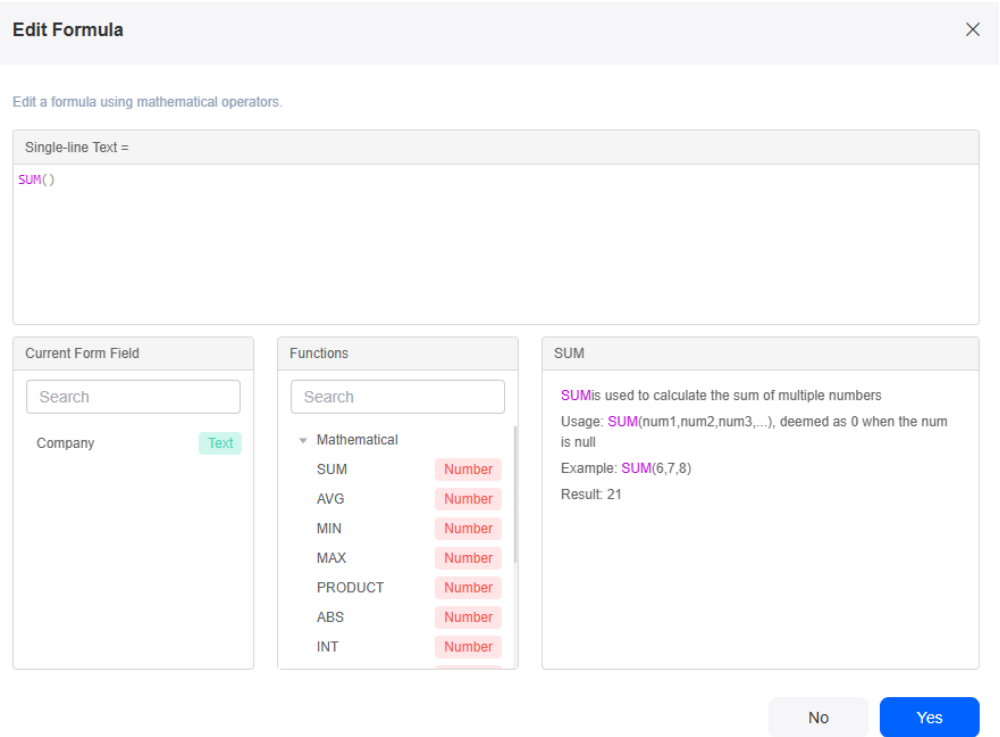
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-60 Setting the default value



- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

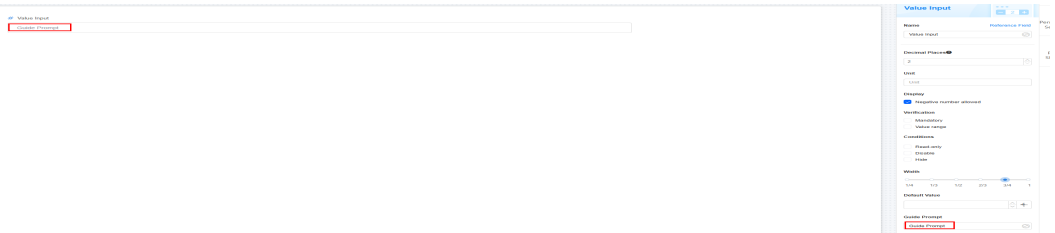
Figure 4-61 Formula editing



Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-62 Setting the guide prompt

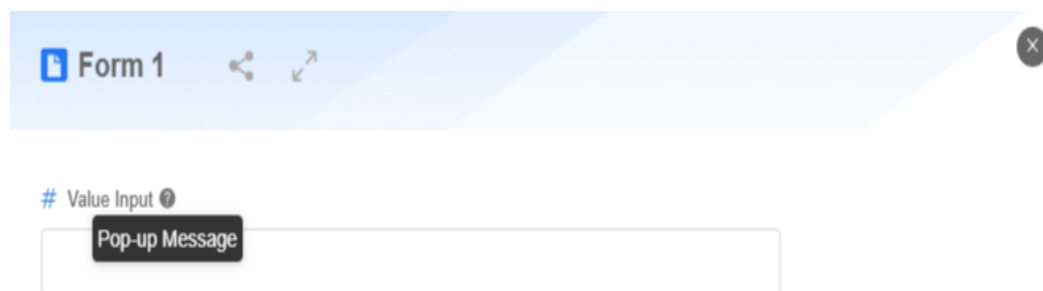


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

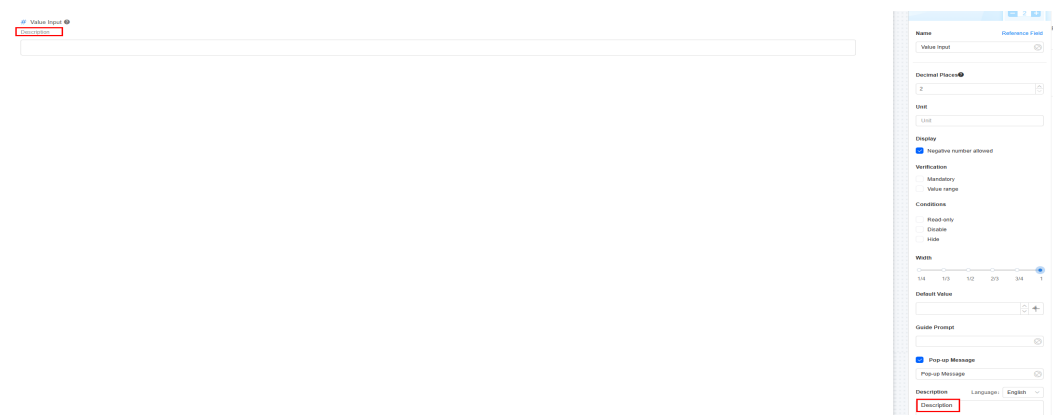
Figure 4-63 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

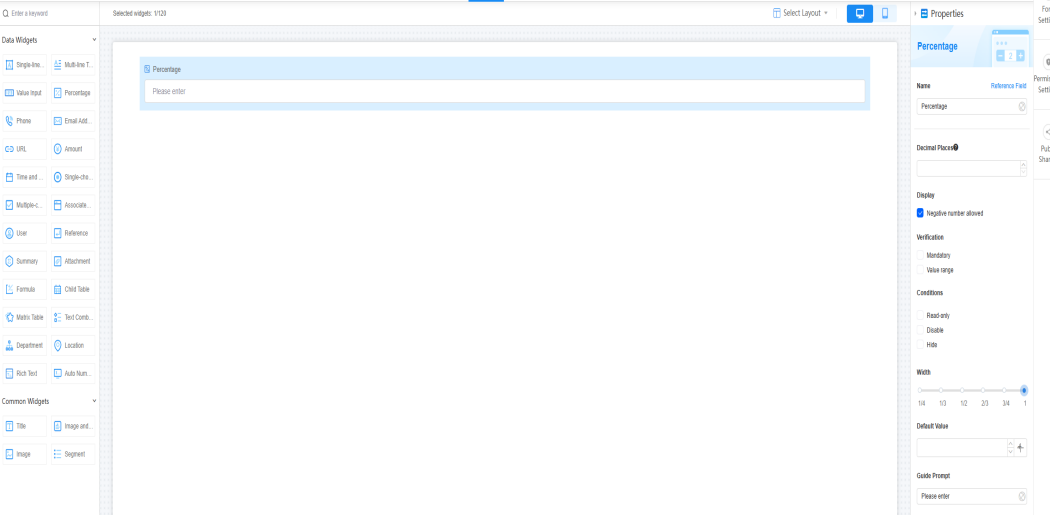
Figure 4-64 Effect



4.6.4 Setting the Properties of the Percentage Widget

This widget records ratios. By default, a percent sign (%) is added to the end of the number entered.

Figure 4-65 Percentage widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-66 Setting the field name (Chinese and English)

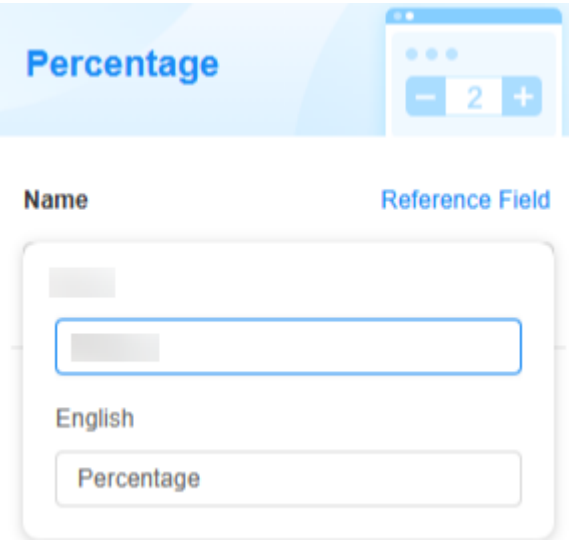
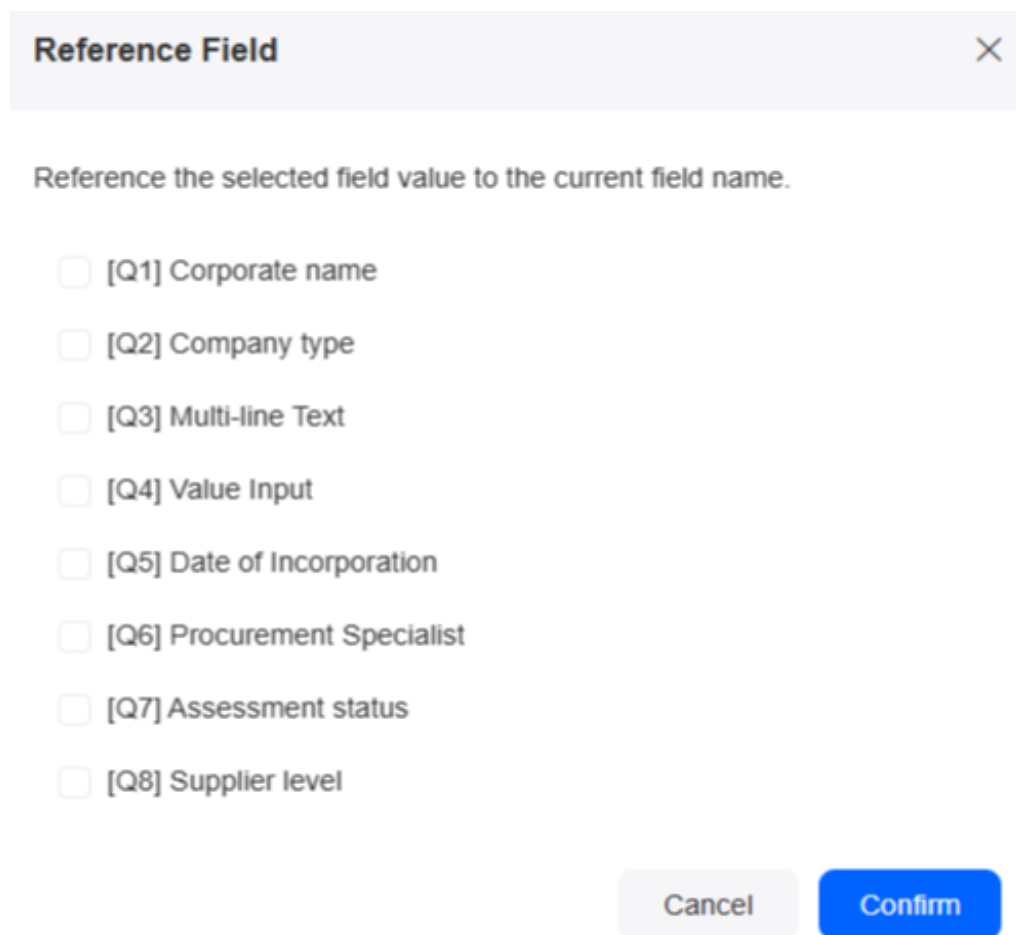


Figure 4-67 Field reference



Reference Field ✕

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

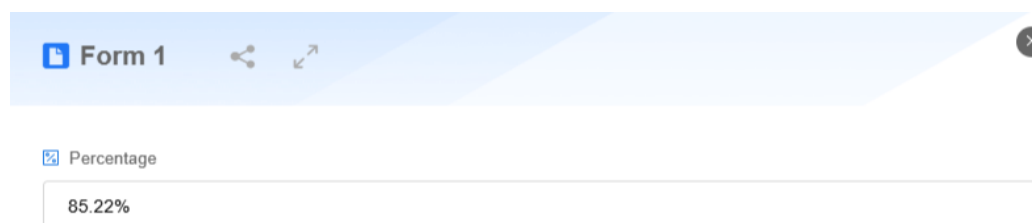
Cancel Confirm

Decimal Places

Set how many decimal places to keep. It starts at **0** by default. After you save the form, you can only increase the number of decimal places.

If you choose **2** decimal places, it will keep just 2. If you type more than that, the platform will round the number automatically.

Figure 4-68 Effect



Form 1

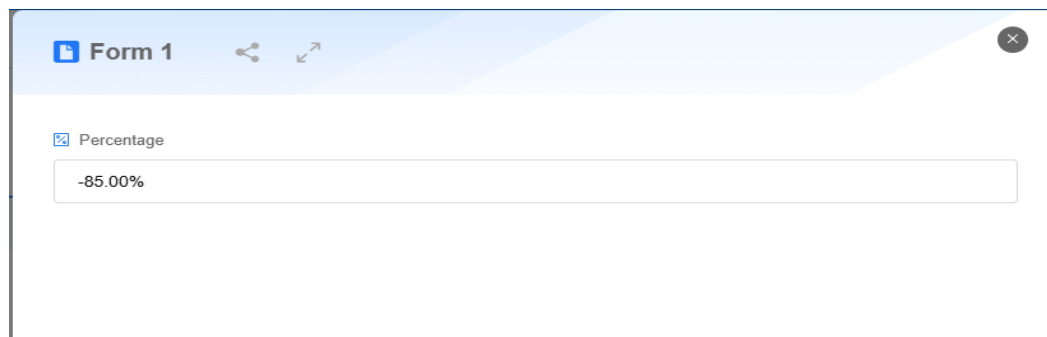
Percentage

85.22%

Display

Negative numbers are allowed by default. For example, you can enter -85.

Figure 4-69 Entering negative numbers



Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- Set the value range to keep the data accurate.

Conditions

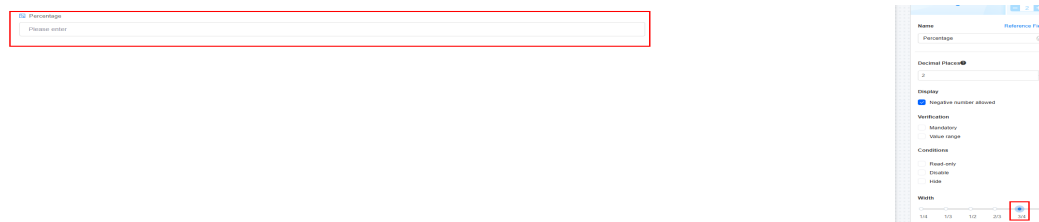
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-70 Setting the widget width



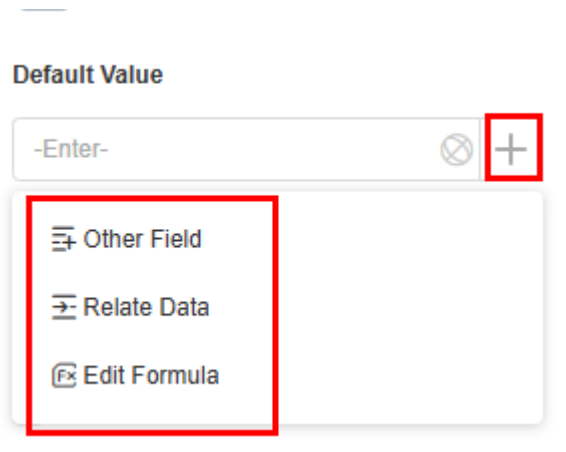
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.

- 1: Widget is full page width (default).

Default Value

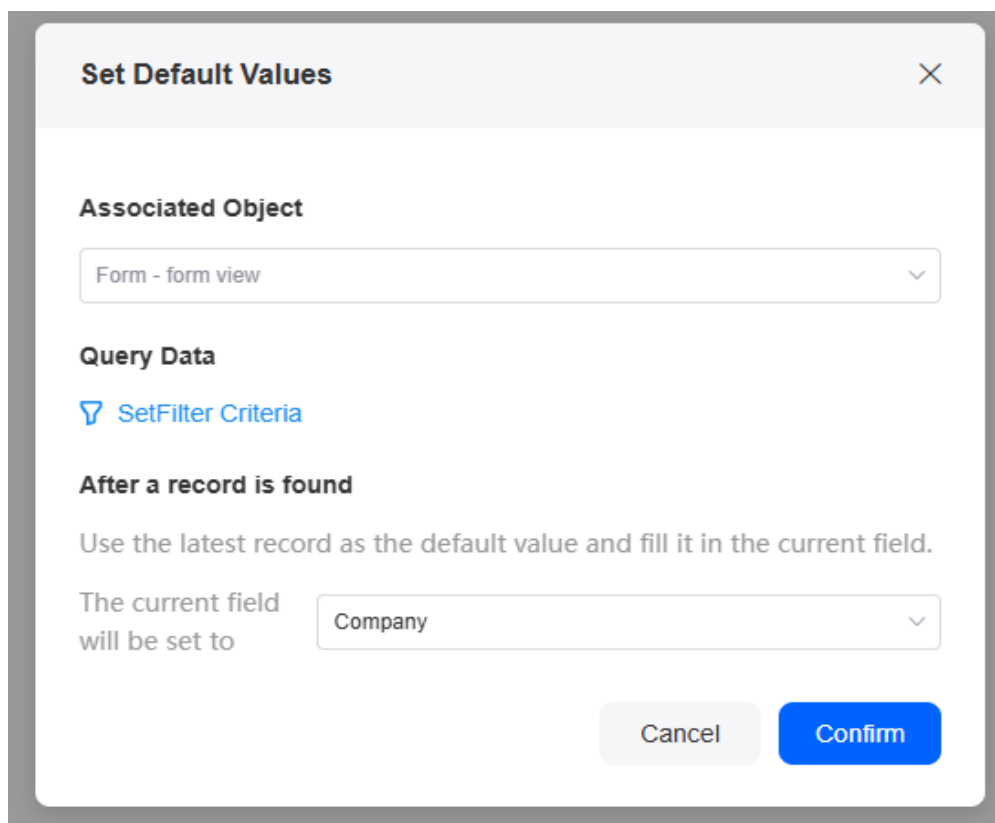
Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-71 Setting the default value of a widget



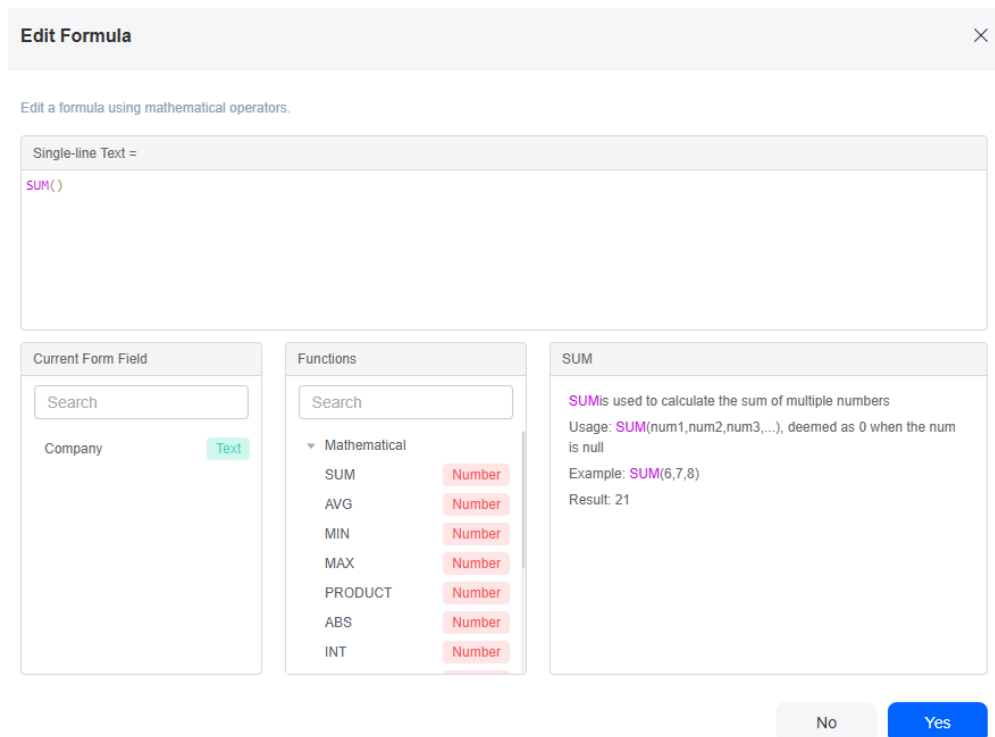
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-72 Setting the default value



- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

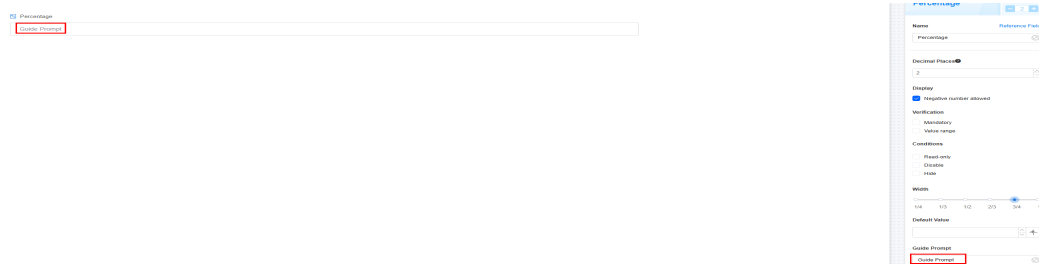
Figure 4-73 Formula editing



Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-74 Setting the guide prompt

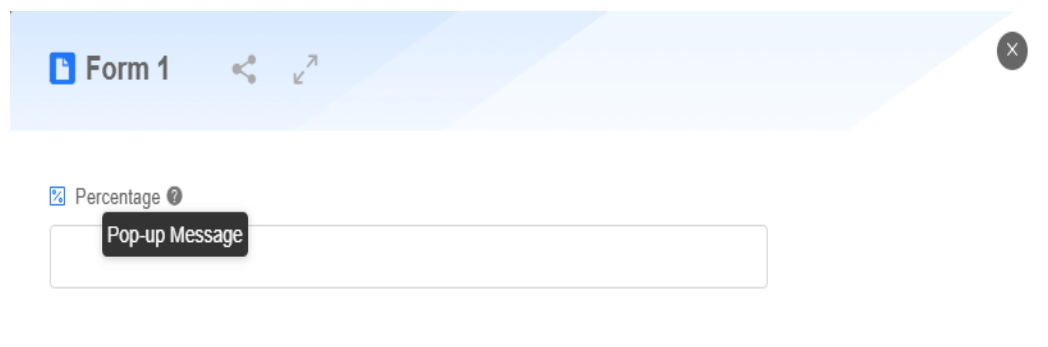


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

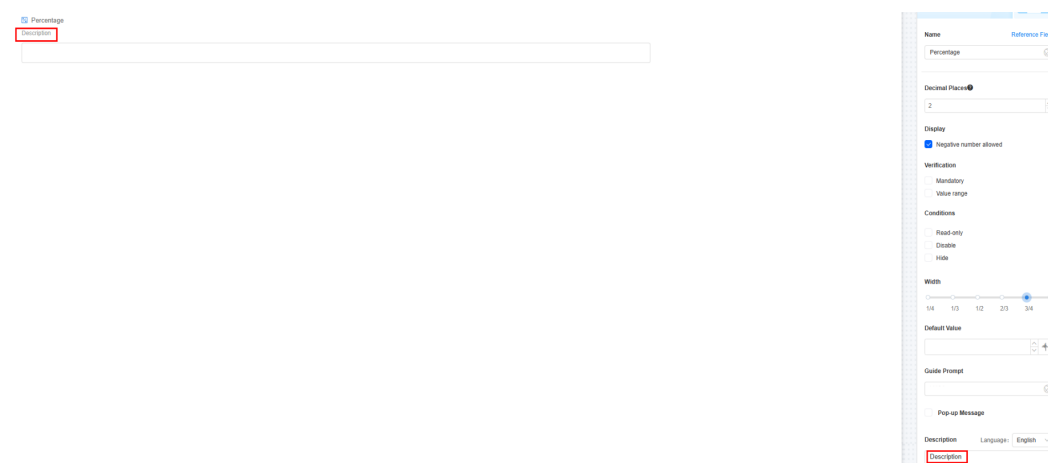
Figure 4-75 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

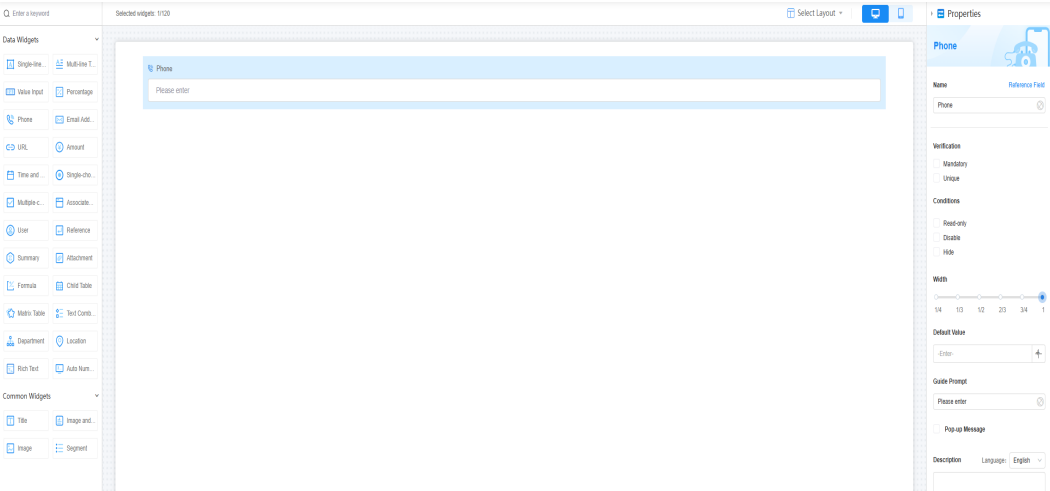
Figure 4-76 Effect



4.6.5 Setting the Properties of the Phone Widget

This widget records 11-digit mobile numbers. The platform checks mobile numbers. If a number is invalid, it shows an error.

Figure 4-77 Phone widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-78 Setting the field name (Chinese and English)

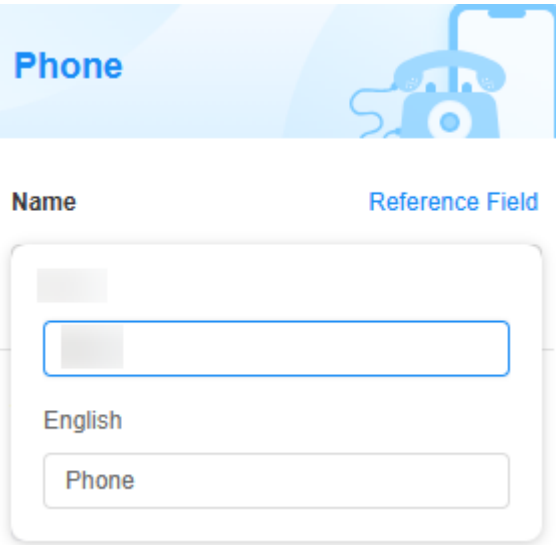
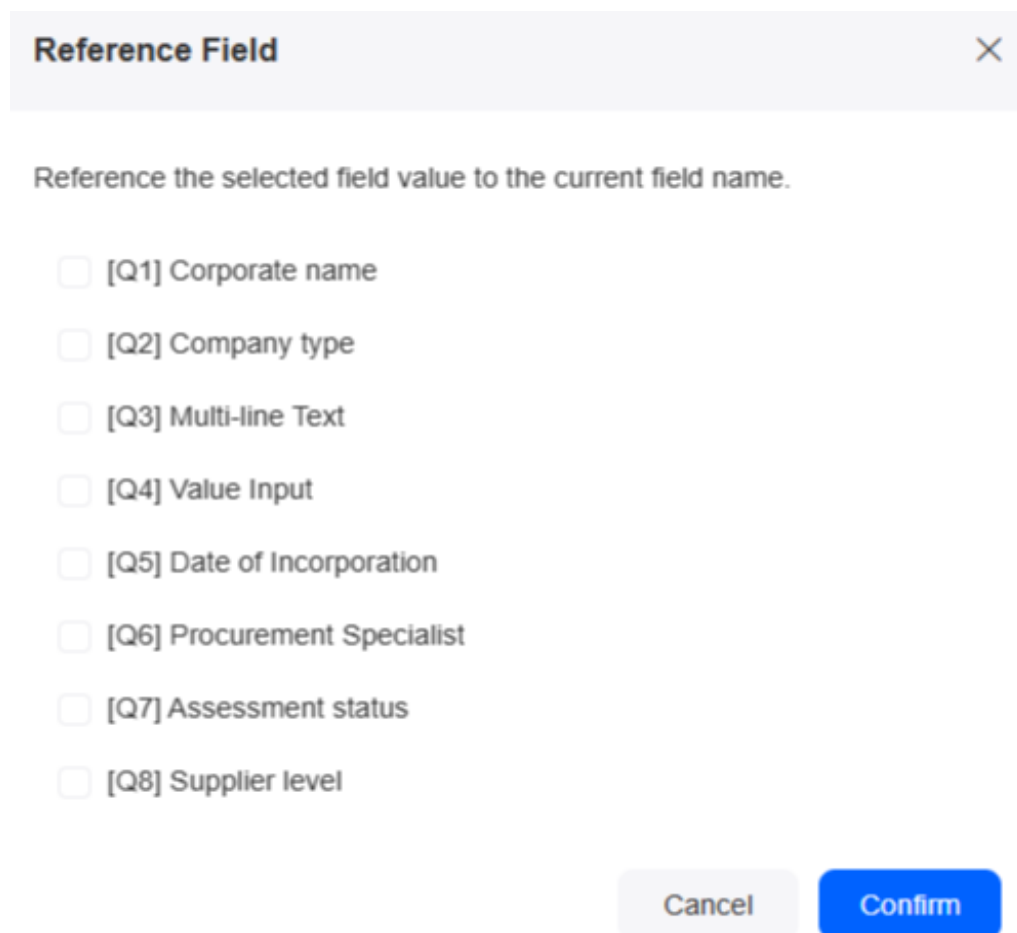


Figure 4-79 Field reference



Reference Field ✕

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

Cancel Confirm

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Unique:** If checked, the field value cannot be repeated.

Conditions

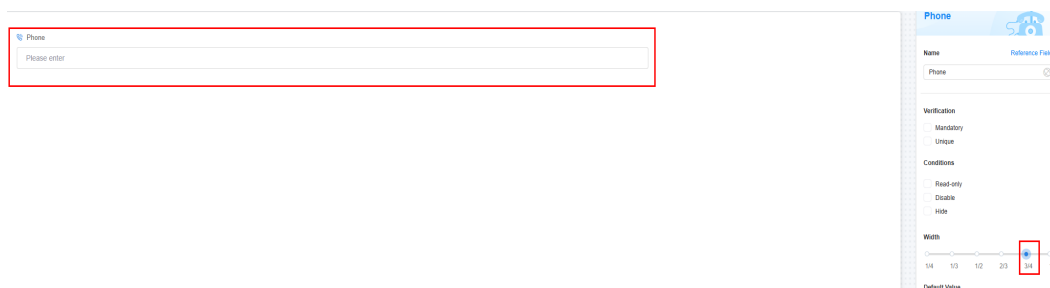
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-80 Setting the widget width

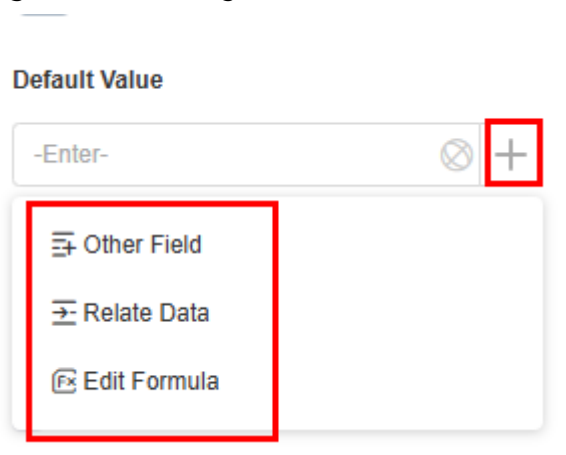


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-81 Setting the default value of a widget



- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-82 Setting the default value

Set Default Values

Associated Object

Form - form view

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Company

Cancel

Confirm

- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

Figure 4-83 Formula editing

Edit Formula

Edit a formula using mathematical operators.

Single-line Text =
SUM()

Current Form Field

Search

Company

Text

Functions

Search

Mathematical

SUM

AVG

MIN

MAX

PRODUCT

ABS

INT

Number

Number

Number

Number

Number

Number

Number

SUM

SUM is used to calculate the sum of multiple numbers

Usage: SUM(num1,num2,num3,...), deemed as 0 when the num is null

Example: SUM(6,7,8)

Result: 21

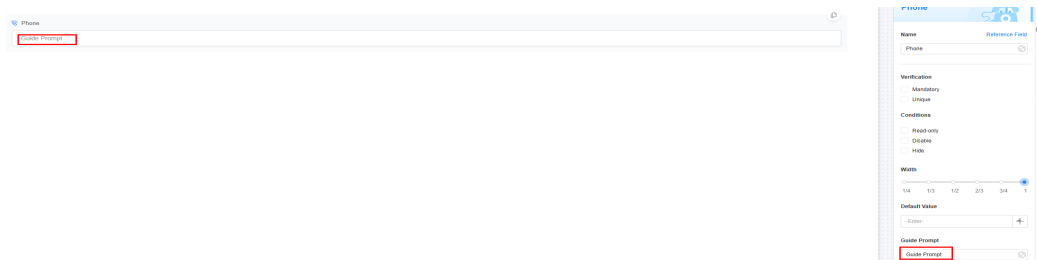
No

Yes

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-84 Setting the guide prompt

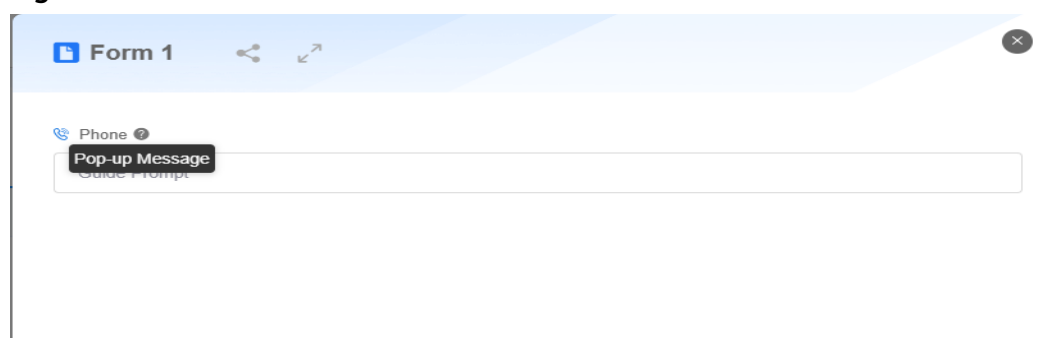


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

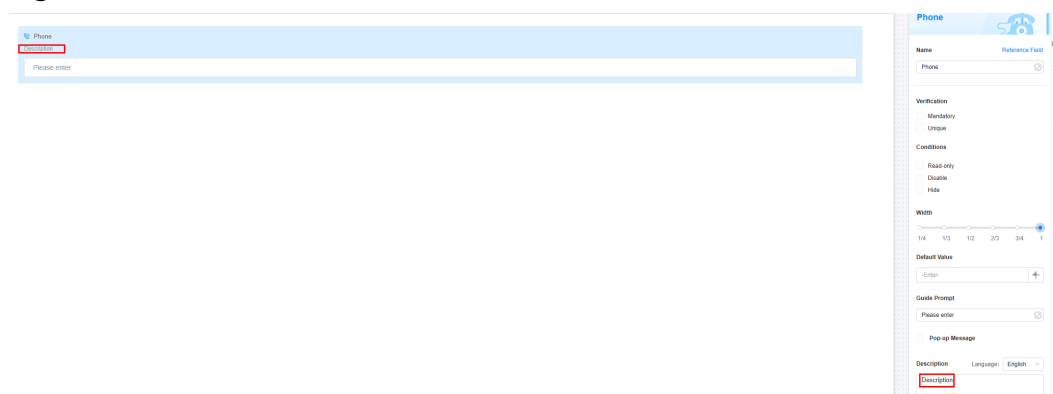
Figure 4-85 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

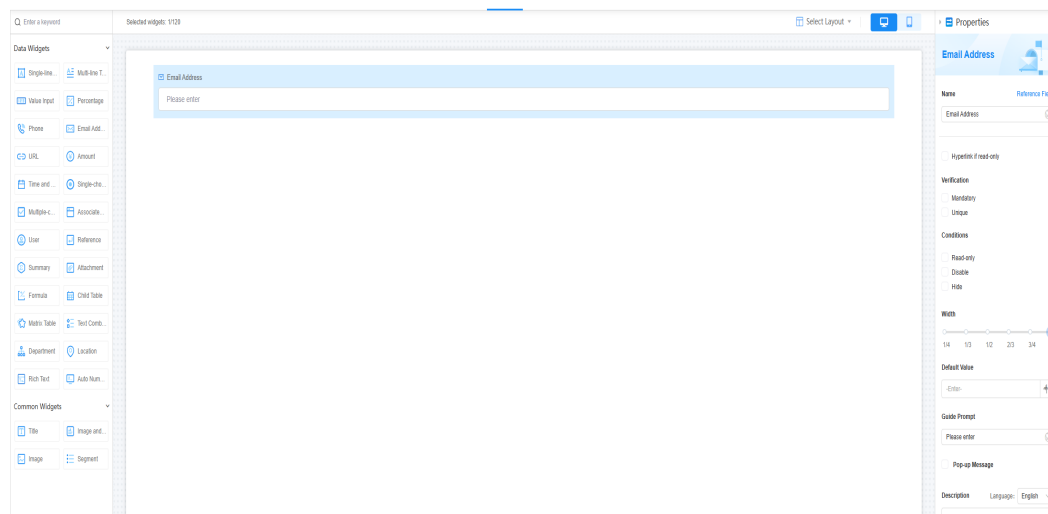
Figure 4-86 Effect



4.6.6 Setting the Properties of the Email Address Widget

This widget records email information. The platform checks email addresses. If one is invalid, it shows an error. Example format: *****@example.com**.

Figure 4-87 Email address widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-88 Setting the field name (Chinese and English)

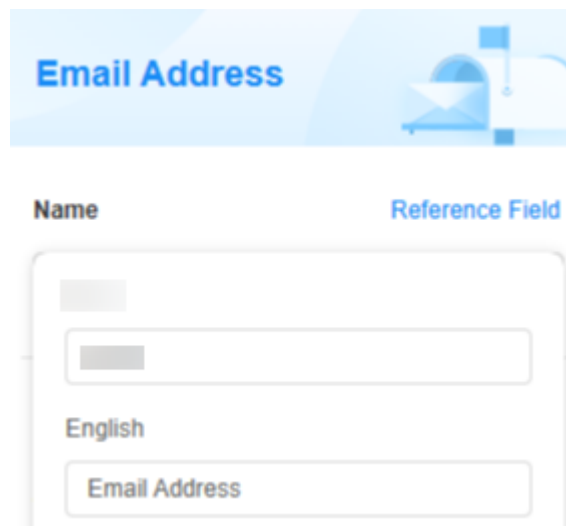
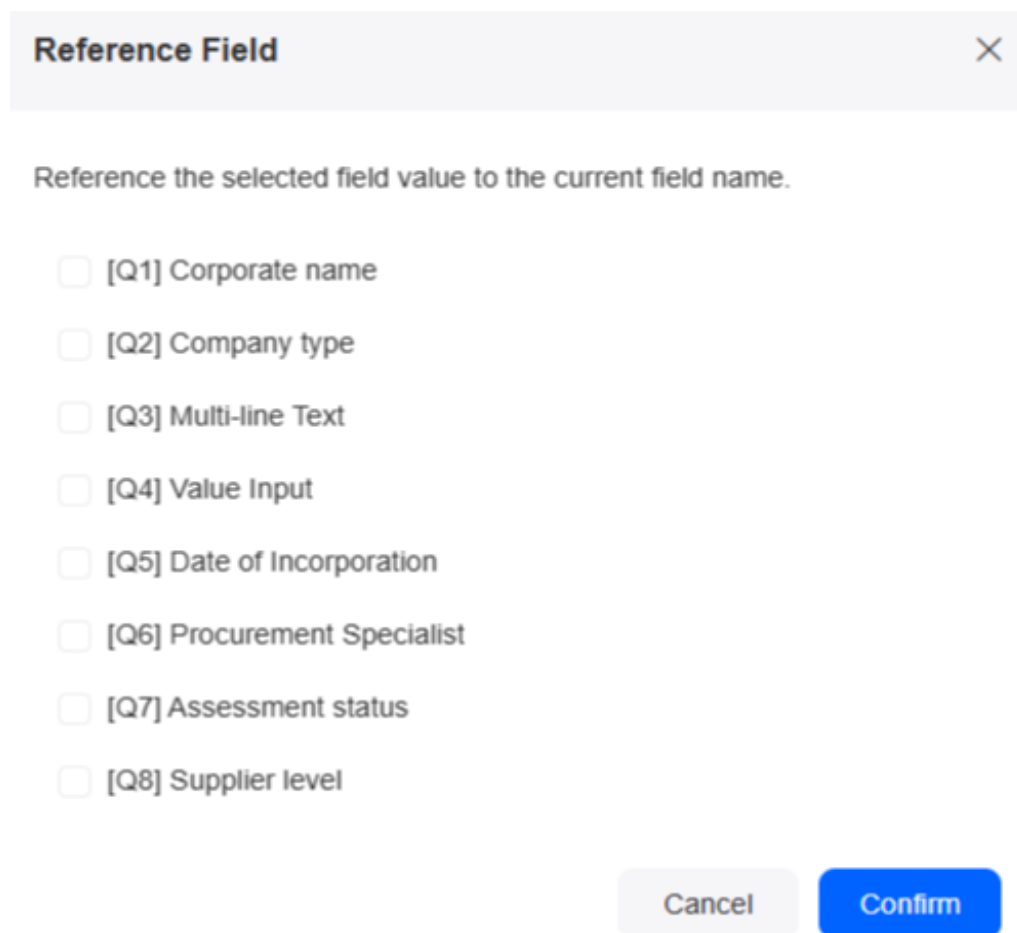


Figure 4-89 Field reference



Reference Field ✕

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

Cancel Confirm

Hyperlink If Read-Only

If this is checked, the field is displayed as a hyperlink.

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Unique:** If checked, the field value cannot be repeated.

Conditions

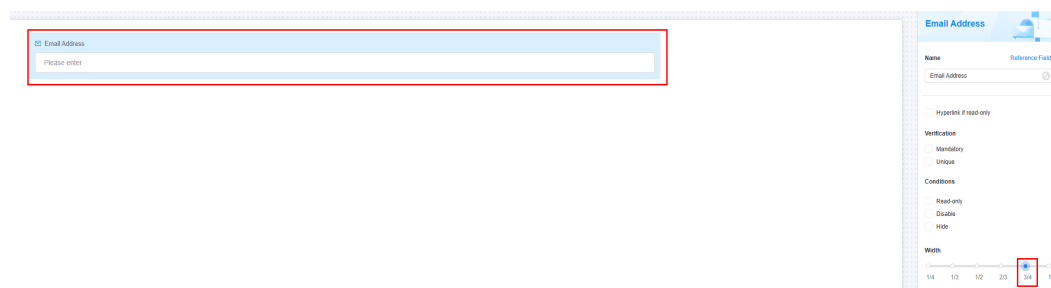
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-90 Setting the widget width

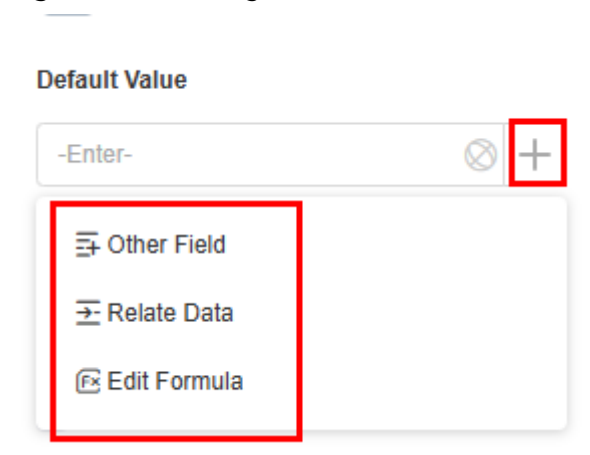


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-91 Setting the default value of a widget



- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-92 Setting the default value

Set Default Values

Associated Object

Form - form view

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Company

Cancel

Confirm

- **Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

Figure 4-93 Formula editing

Edit Formula

Edit a formula using mathematical operators.

Single-line Text =

SUM()

Current Form Field

Search

Company

Text

Functions

Search

Mathematical

SUM

AVG

MIN

MAX

PRODUCT

ABS

INT

SUM

SUM is used to calculate the sum of multiple numbers

Usage: SUM(num1,num2,num3,...), deemed as 0 when the num is null

Example: SUM(6,7,8)

Result: 21

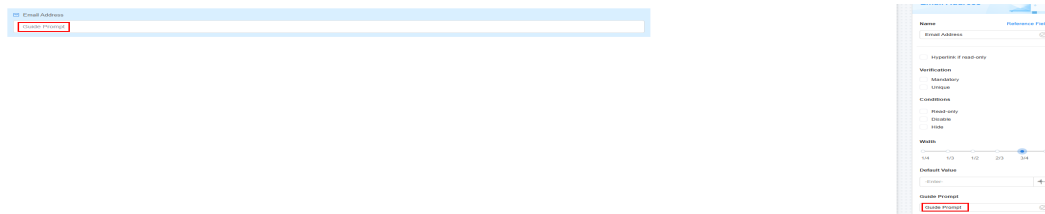
No

Yes

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-94 Setting the guide prompt

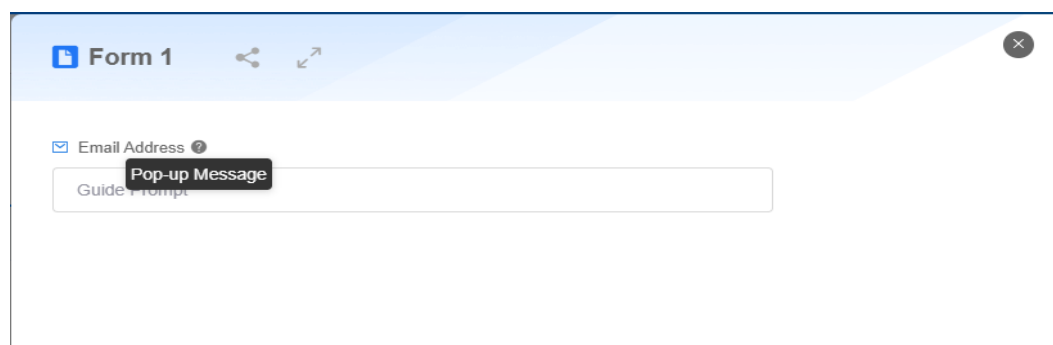


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

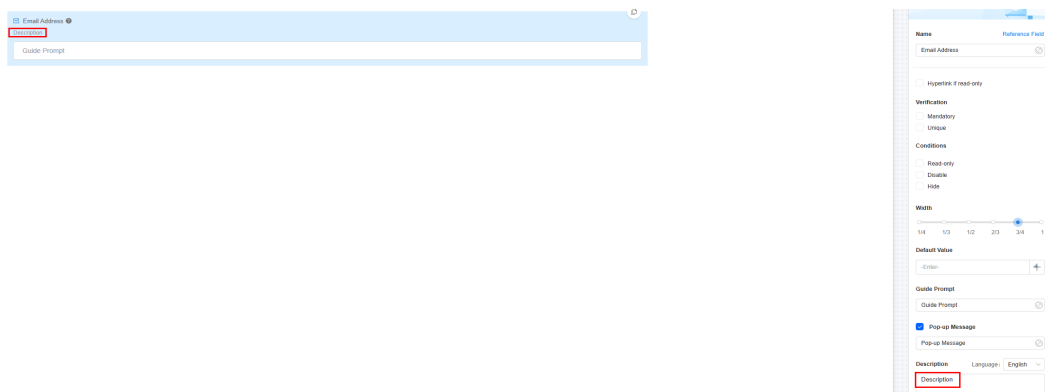
Figure 4-95 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

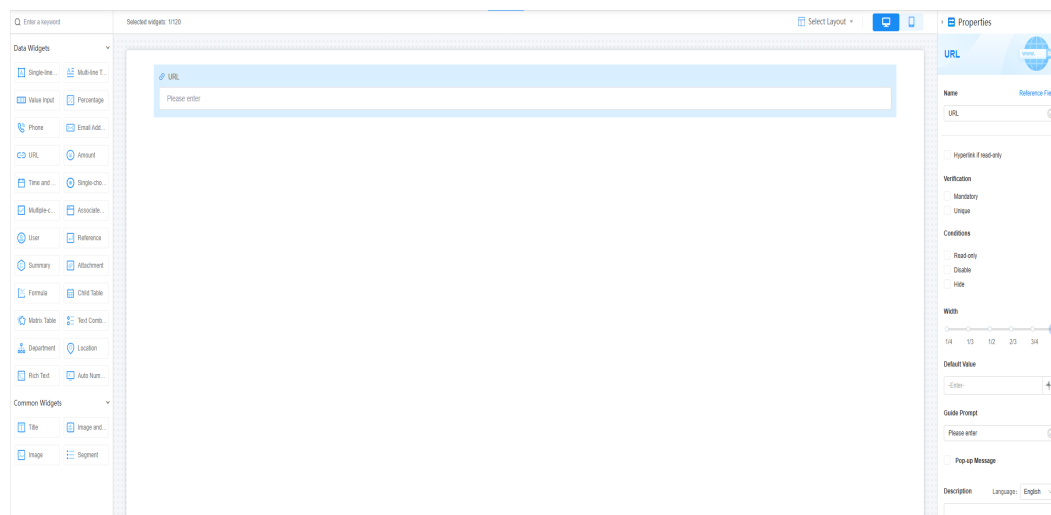
Figure 4-96 Effect



4.6.7 Setting the Properties of the URL Widget

This widget records URL information. The platform checks URLs. If one is invalid, it shows an error.

Figure 4-97 URL widget



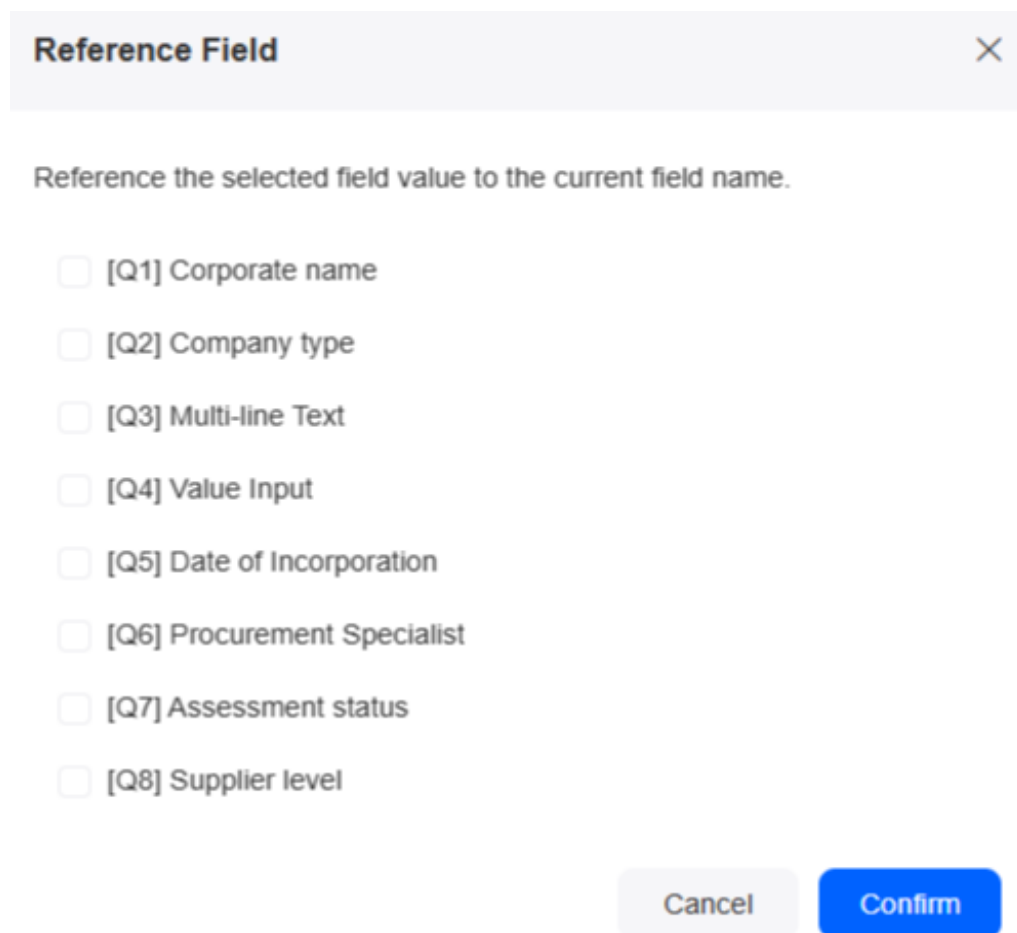
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-98 Setting the field name (Chinese and English)



Figure 4-99 Field reference



Reference Field ✕

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

Cancel Confirm

Hyperlink If Read-Only

If this is checked, the field is displayed as a hyperlink.

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Unique:** If checked, the field value cannot be repeated.

Conditions

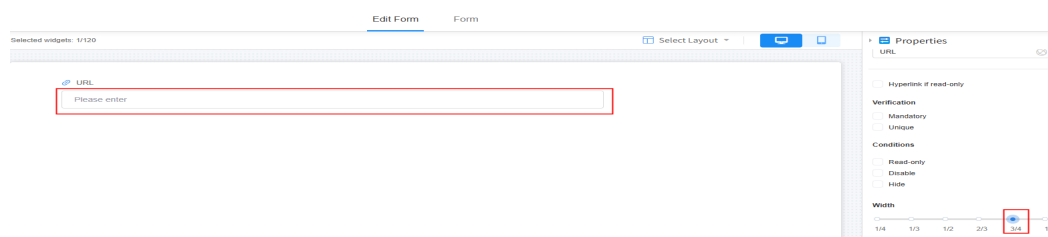
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-100 Setting the widget width



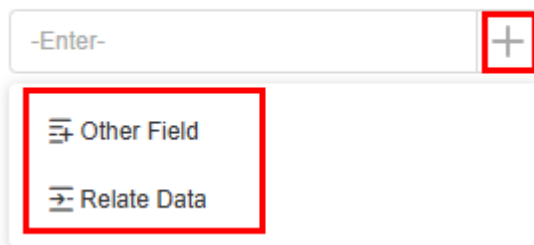
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-101 Setting the default value of a widget

Default Value



- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-102 Setting the default value

Set Default Values

Associated Object

Supplier List - All

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Corporate name

Cancel

Confirm

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-103 Setting the guide prompt

URL

Guide Prompt

Name
Reference Field

URL

☐ Hyperlink if read-only

Verification

☐ Mandatory
☐ Unique

Conditions

☐ Read-only
☐ Disable
☐ Hide

Width

14 13 12 23 34 1

Default Value

Enter

Guide Prompt

Guide Prompt

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

Figure 4-104 Setting the pop-up message

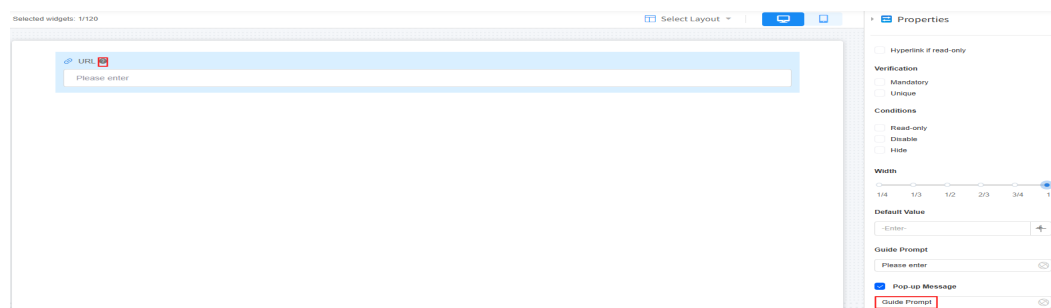
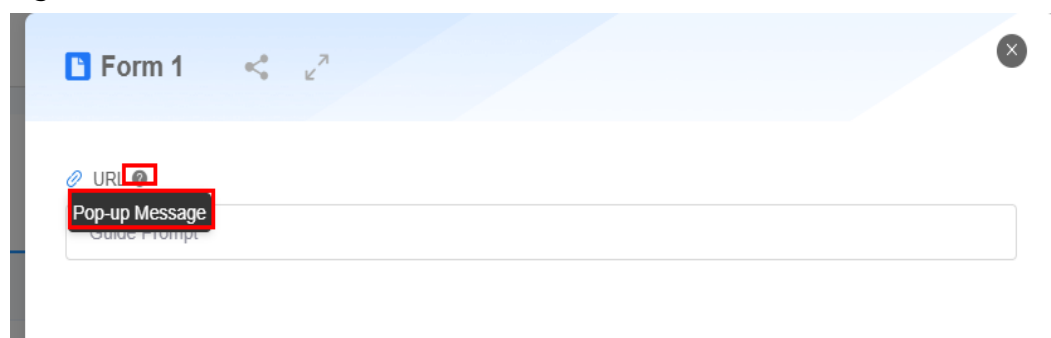


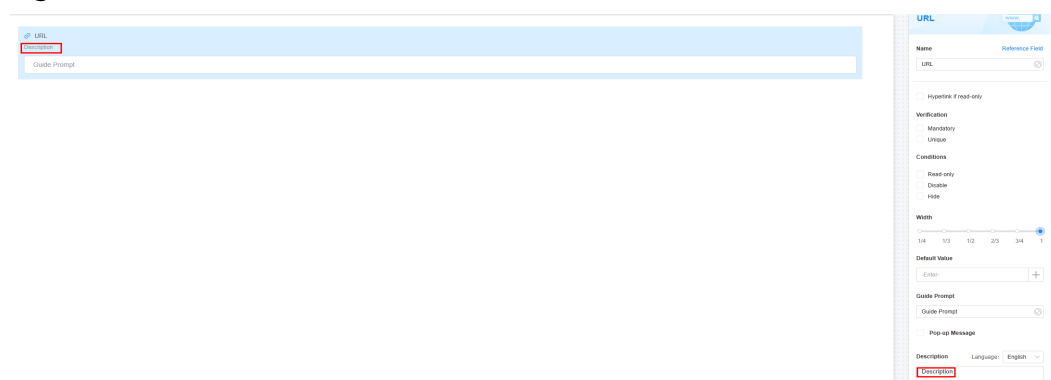
Figure 4-105 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

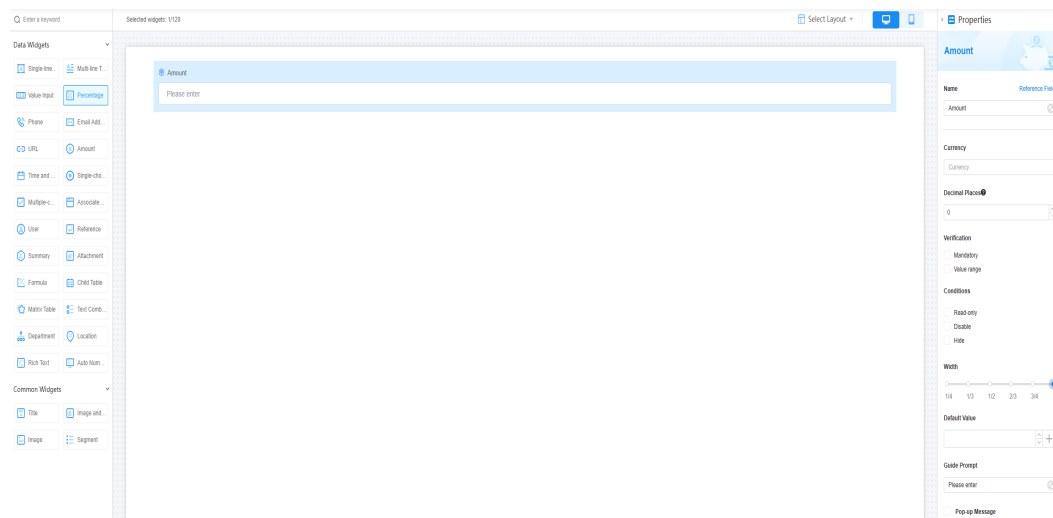
Figure 4-106 Effect



4.6.8 Setting the Properties of the Amount Widget

This widget records amounts.

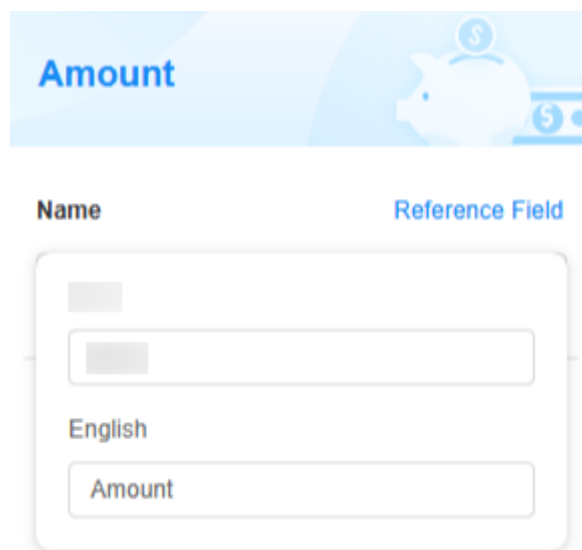
Figure 4-107 Amount widget



Name

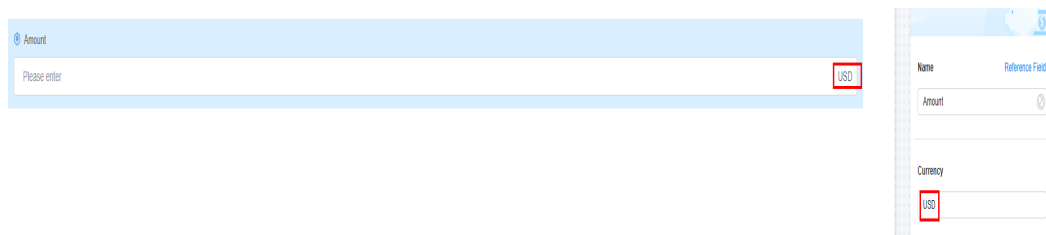
Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-108 Setting the field name (Chinese and English)



Currency

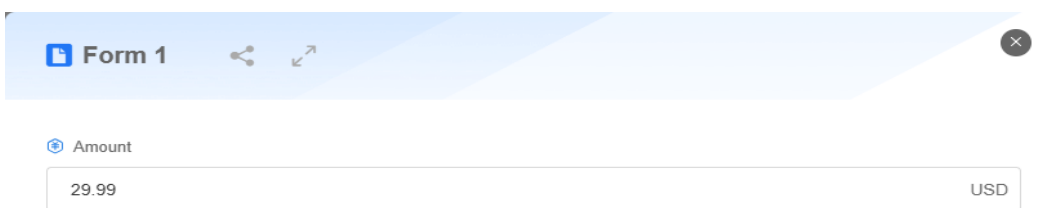
Set the unit for the amount, like dollars and cents.

Figure 4-109 Setting the currency unit

Decimal Places

Set how many decimal places to keep. It starts at **0** by default, which works well for entering amounts. After you save the form, you can only increase the number of decimal places.

If you choose **2** decimal places, it will keep just 2. If you type more than that, the platform will round the number automatically.

Figure 4-110 Effect

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- Set the value range, like 10.01 to 1000.99, to keep the data accurate.

Conditions

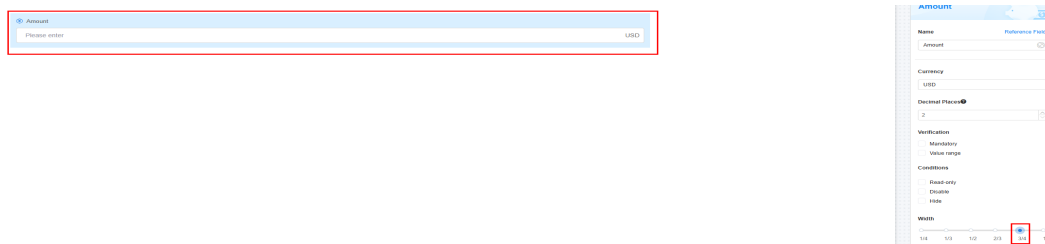
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

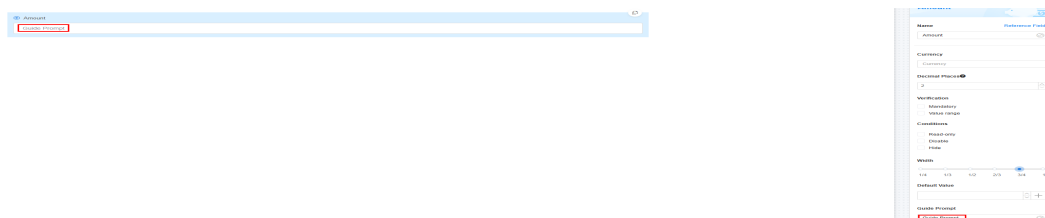
Figure 4-111 Setting the widget width



Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-112 Setting the guide prompt

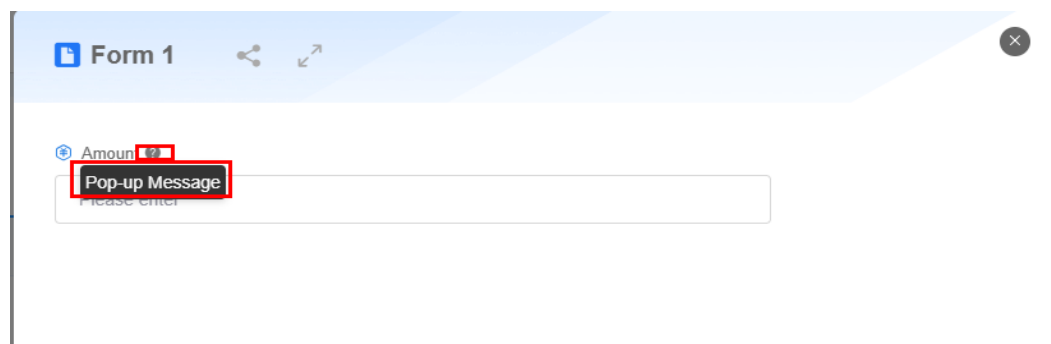


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

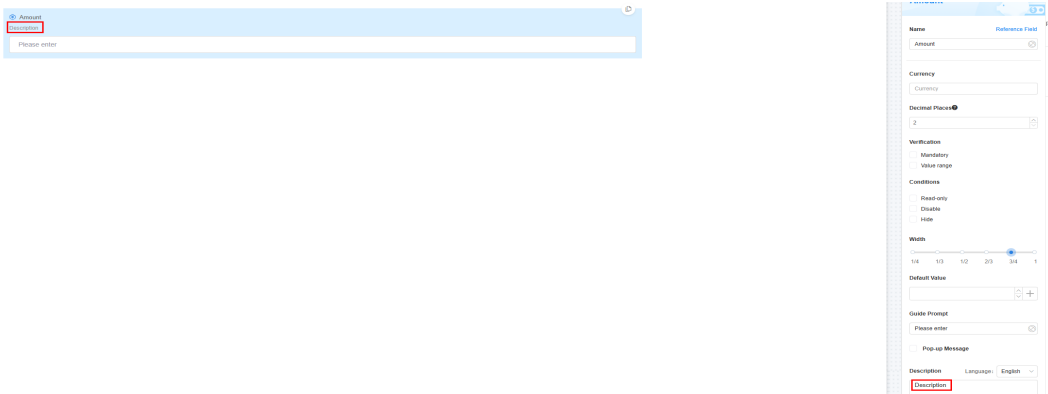
Figure 4-113 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-114 Effect

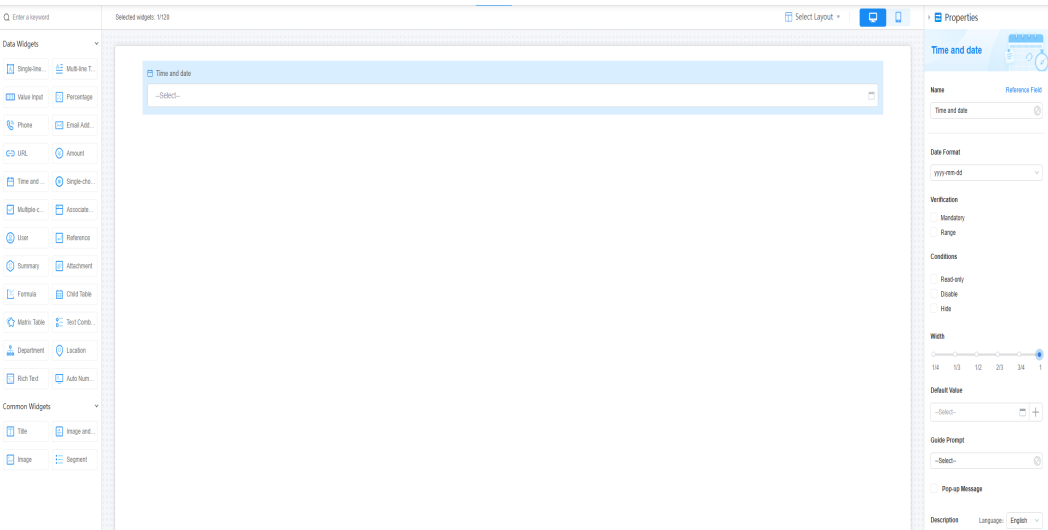


4.6.9 Setting the Properties of the Time and Date Widget

This widget records dates, like for business trips or overtime work. You can use current dates or pick specific ones.

To display the current date on the page, check **Disable** for **Conditions** and select the current date for **Default Value**.

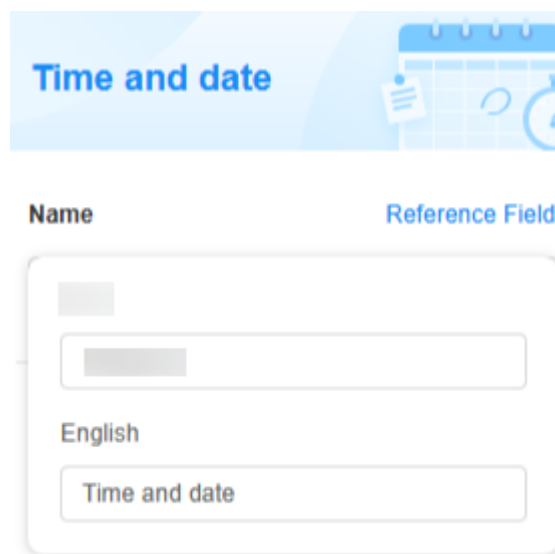
Figure 4-115 Time and date widget



Name

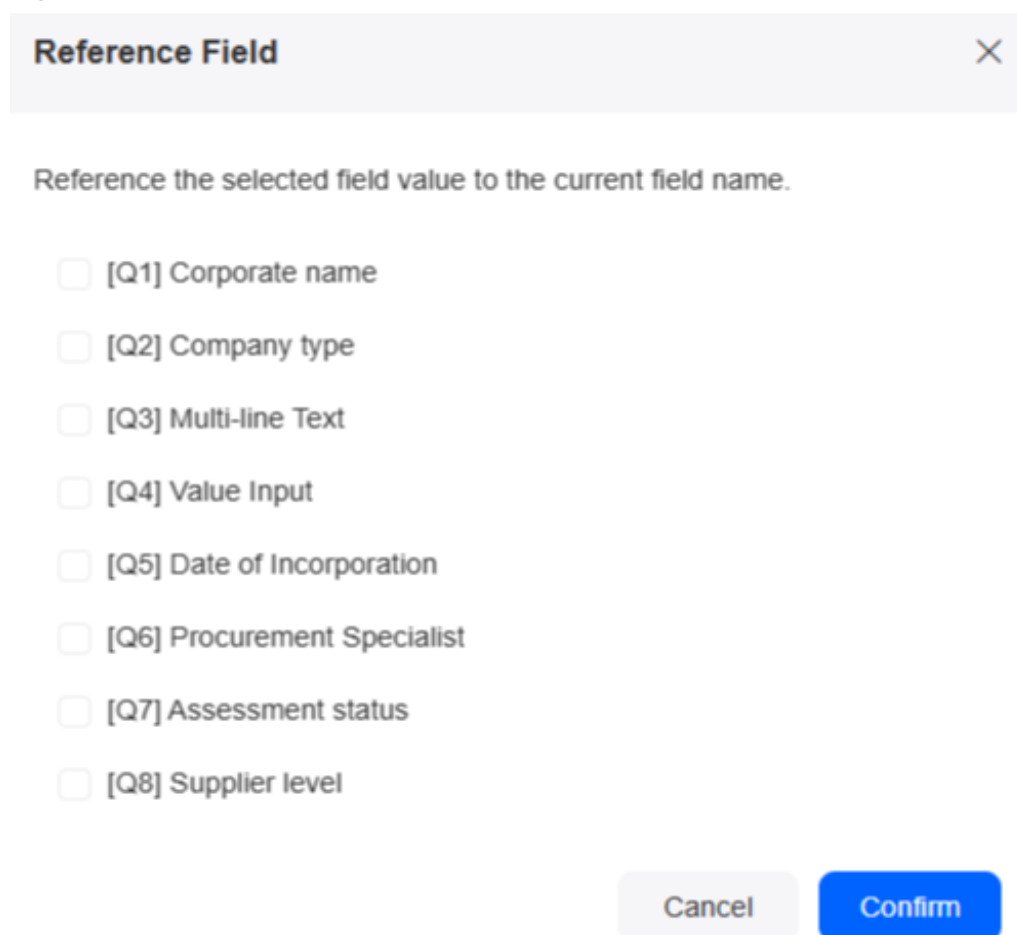
Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-116 Setting the field name (Chinese and English)



The screenshot shows a configuration window for a 'Time and date' field. At the top, there is a header bar with the text 'Time and date' and a calendar icon. Below the header, there are two tabs: 'Name' and 'Reference Field'. The 'Name' tab is currently selected. Under the 'Name' tab, there is a text input field with a placeholder 'Time and date'. Below this, there is a section labeled 'English' with another text input field containing the text 'Time and date'.

Figure 4-117 Field reference



The screenshot shows a dialog box titled 'Reference Field' with a close button (X) in the top right corner. Below the title bar, there is a text label: 'Reference the selected field value to the current field name.' Below this label, there is a list of eight items, each with a checkbox and a label:

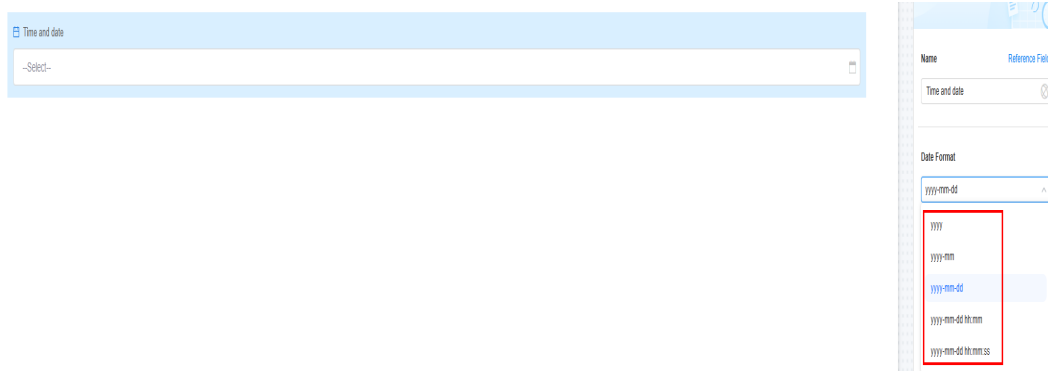
- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Confirm'.

Date Format

Choose a date format. The platform offers several options. The default is **yyyy-mm-dd**.

Figure 4-118 Preset date formats

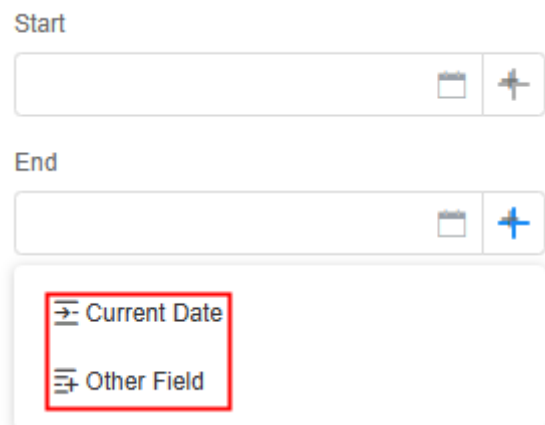


Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Range:** Set a date and time range. You can pick the current date or other values.

Figure 4-119 Setting the range



Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-120 Setting the widget width



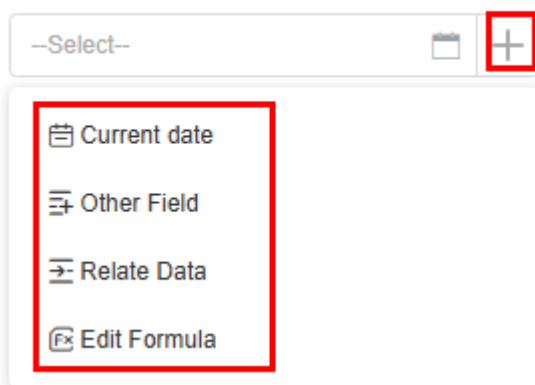
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-121 Setting the default value of a widget

Default Value



- Current date: Use the current system time as the default value.
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-122 Setting the default value

Set Default Values

Associated Object

Supplier List - All

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Corporate name

Cancel

Confirm

- Formula editing:** After you add a formula to a field, its value is calculated automatically when you fill in or change the form.

Figure 4-123 Formula editing

Formula editing

editor formula use math operator

Time and date =

SUM()

Current Form Fields

search field

Corporate name
Text

Company type
Text

Date of Incorporation
Date

Procurement Specialist
Text

Assessment status
Text

Supplier level
Text

Function List

search function

Math function

Time function

Text function

Logic function

SUM

SUM is used to calculate the sum of multiple numbers
usage: SUM(num1,num2,num3,...), deemed as 0 when the num is null
example: SUM(6,7,8)
result: 21

No

Yes

Issue 01 (2025-08-21)

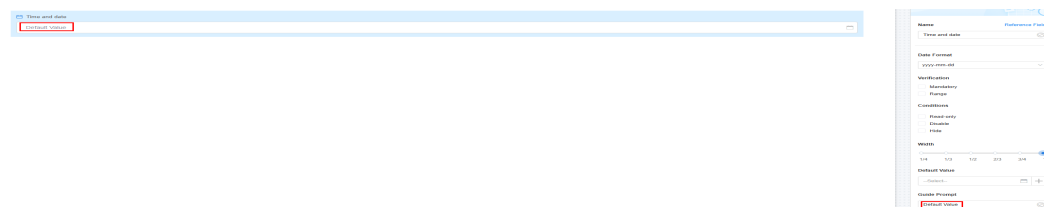
Copyright © Huawei Cloud Computing Technologies Co., Ltd.

152

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-124 Setting the guide prompt

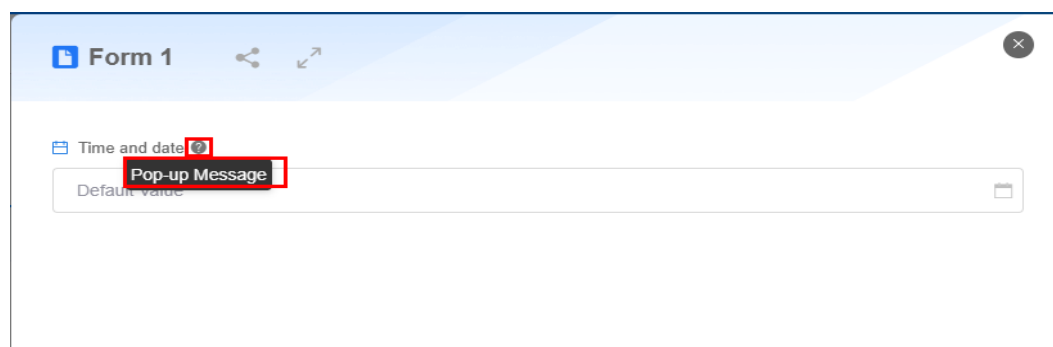


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

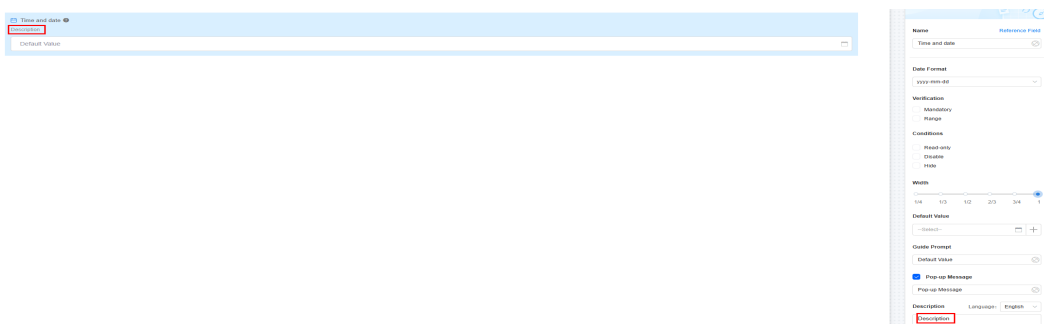
Figure 4-125 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

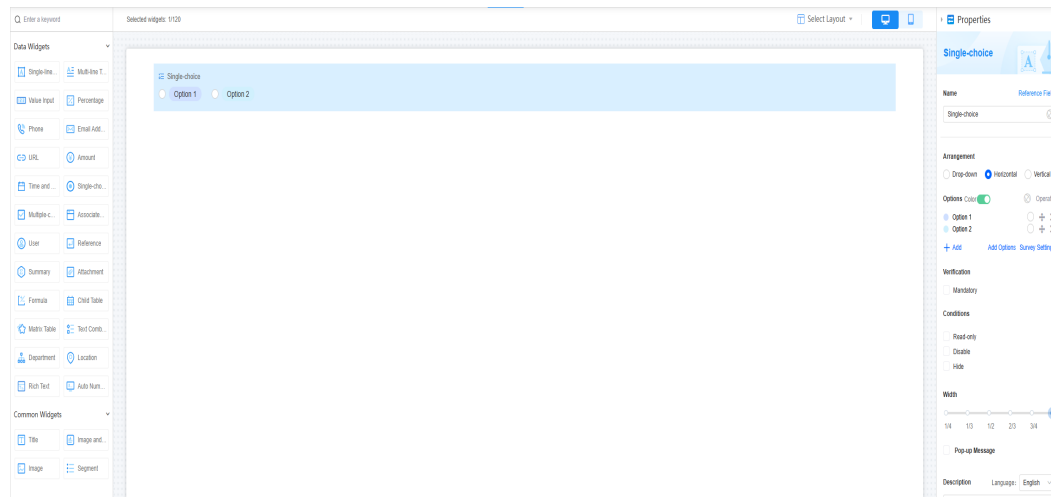
Figure 4-126 Effect



4.6.10 Setting the Properties of the Single-Choice Widget

This widget lets you pick an option from a list, like choosing a gender.

Figure 4-127 Single-choice widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-128 Setting the field name (Chinese and English)

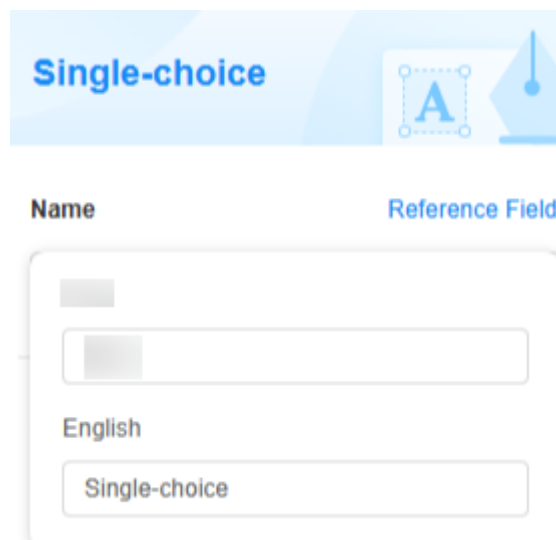


Figure 4-129 Field reference

Reference Field

Reference the selected field value to the current field name.

☐ [Q1] Corporate name

☐ [Q2] Company type

☐ [Q3] Multi-line Text

☐ [Q4] Value Input

☐ [Q5] Date of Incorporation

☐ [Q6] Procurement Specialist

☐ [Q7] Assessment status

☐ [Q8] Supplier level

Cancel

Confirm

Arrangement

Choose how the options are arranged: drop-down list, vertical, or horizontal. The default is horizontal.

Figure 4-130 Drop-down

Single-choice

Single-choice

Reference Field

Single-choice

Arrangement

Drop-down

Horizontal

Vertical

Figure 4-131 Horizontal

Single-choice

Option 1

Option 2

Single-choice

Reference Field

Single-choice

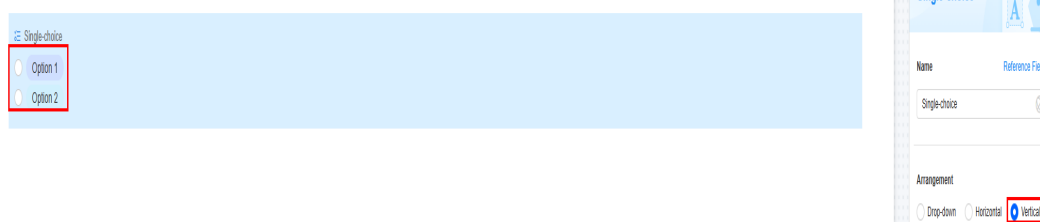
Arrangement

Drop-down

Horizontal

Vertical

Figure 4-132 Vertical



Options

Add options for the widget. By default, different options show in different colors.

Click **Add** to add an option. Click the option name (like "Option 1") to rename it.


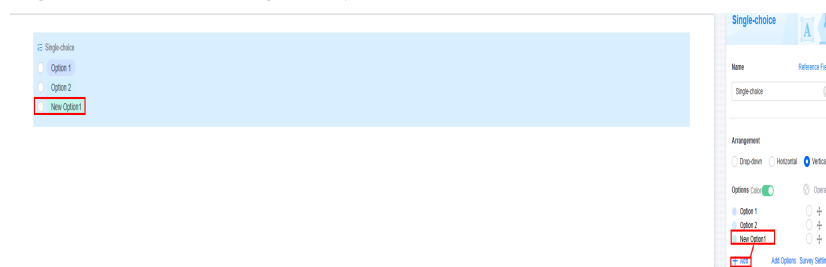
Click ☐ to make it the default choice. Drag  to move an option to the top.

Figure 4-133 Adding an option



Click **Batch Add** to add multiple options. **Each row is an option. An option name can be up to 85 characters long.**

Figure 4-134 Adding options in batches

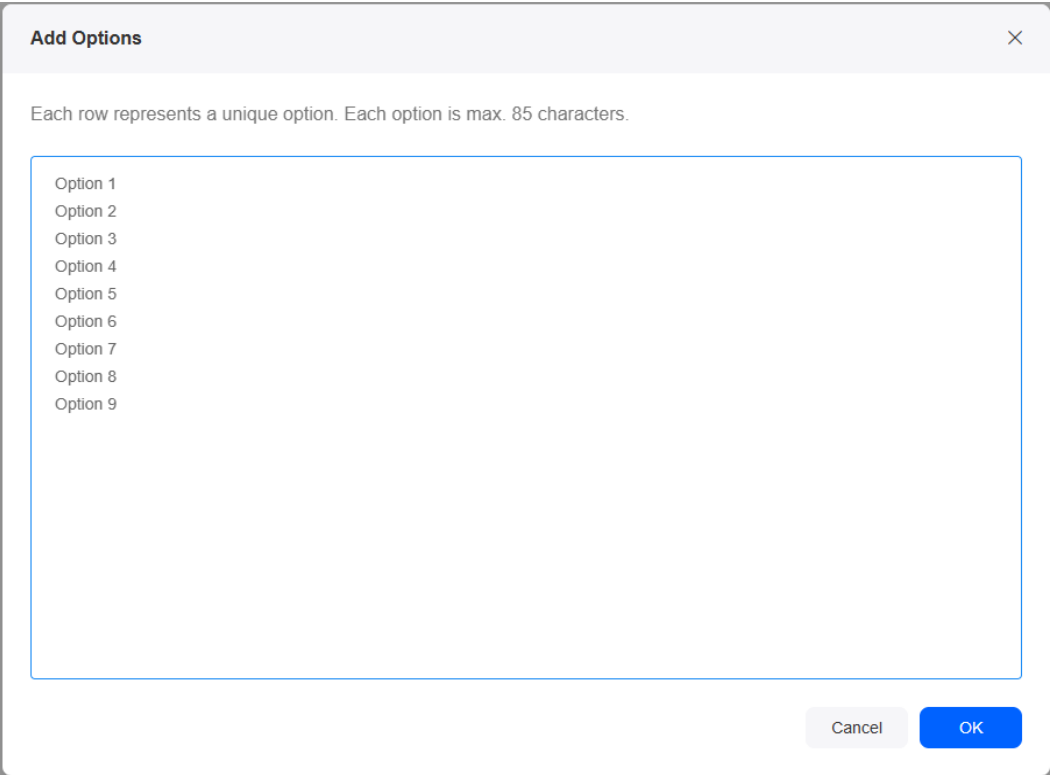
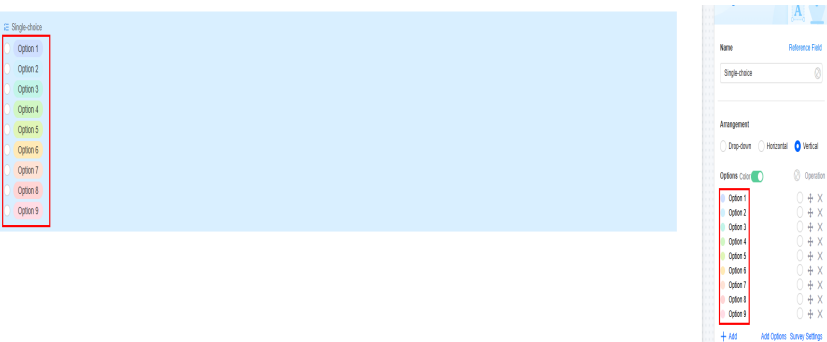


Figure 4-135 Effect



Click **Survey Settings** to turn on features like randomizing option order, assigning scores, and linking options.

Table 4-10 Survey settings

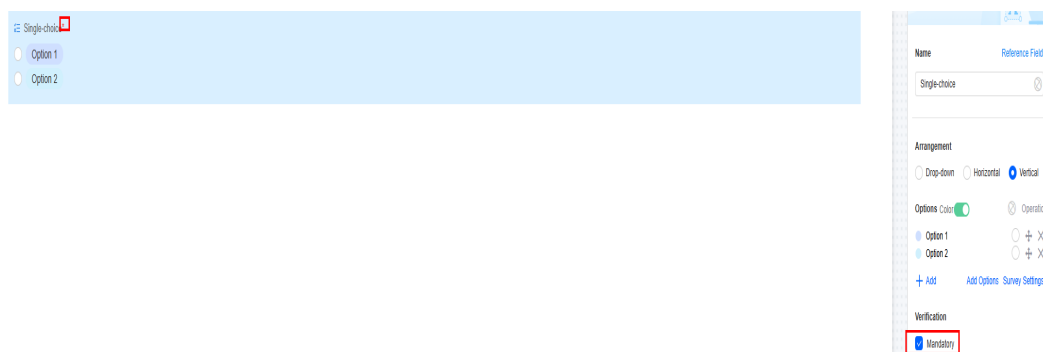
Parameter	Description
Enable random order	When enabled, the options will show up in a different random order each time you access the field.

Parameter	Description
Enable option scoring	Give each option a score. Options with scores can be used in calculations. Choose a scoring method. If enabled, set the scores or select items. <ul style="list-style-type: none">Each option gets a score: Every option has its own score.Score only when selected: Only the chosen options will get a score. If you check this option, set the scores for the options.
Enable option association	By default, multiple options are hidden. These options show up based on whether you select options in a previous field. For details, see Setting Option Associations .

Verification

Mandatory: If checked, the field is required and shows a * next to it.

Figure 4-136 Effect



Conditions

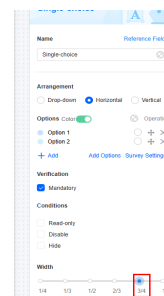
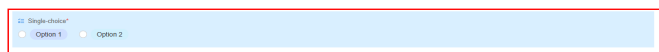
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-137 Setting the widget width



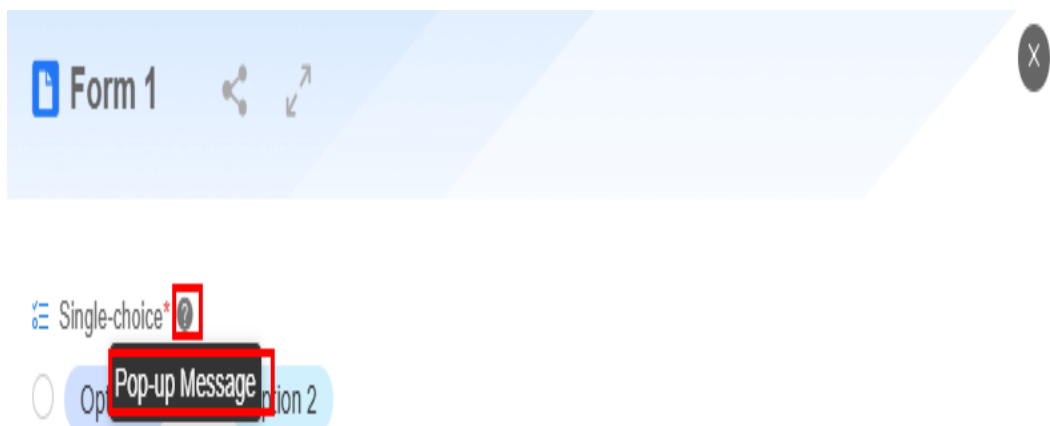
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

Figure 4-138 Effect



Description

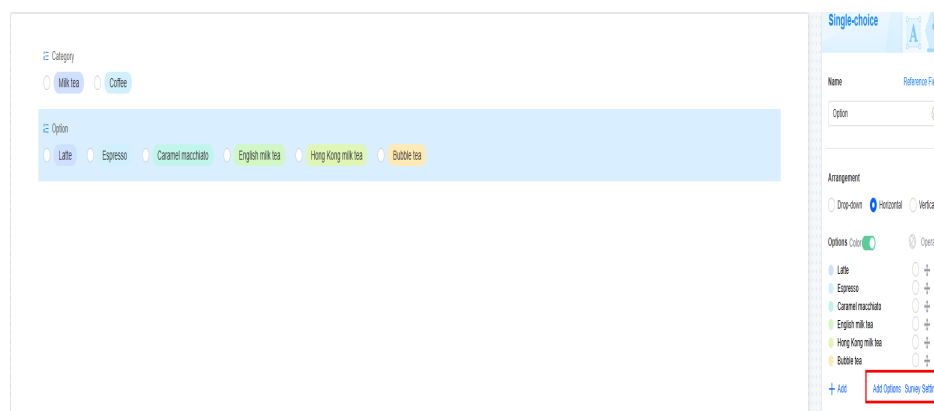
Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-139 Effect

Setting Option Associations

For example, in a food ordering application, you can choose coffee or milk tea from the drink category, then you can see specific coffee options (like latte, espresso, caramel macchiato) or milk tea options (like English milk tea, Hong Kong milk tea, bubble tea). By setting up this function, the application shows only the relevant drink options based on your choice. If you choose "Coffee," you will only see coffee options.

Step 1 Click **Survey Settings** on the right.

Figure 4-140 Clicking Survey Settings

Step 2 Turn on the option association switch and click "Setting" of the target option.

Figure 4-141 Adding an association

Survey Settings

Provides general capabilities of questionnaire forms, such as options random and mutually exclusive. Simple steps to set up and play with data collection.

Enable random orderWhen Enabled, the options of this field appear in a random order during each access.

Enable option scoringOnce enabled, set the score or select an item in the table.

Enable option associationOnce enabled, set the option association in the table.

Option content	Set the score	Set associations
Latte		Setting
Espresso		Setting
Caramel macchiato		Setting
English milk tea		Setting
Hong Kong milk tea		Setting
Bubble tea		Setting

Cancel

OK

Step 3 Select the value of the associated field, for example, "Coffee" under "Drink Category," and click the confirm button.

When this option is selected, the current option "Latte" is displayed on the page.

Figure 4-142 Setting associated options

Option Associations

Multiple options under a field are hidden by default. The display of different options is related to the selection of a field.

Current option: Latte

Selected Field 1

Category

×

If the user selects any of the following options

☐ Milk tea

☒ Coffee

+ Add Condition

When the preceding conditions are met, Latte displayed.

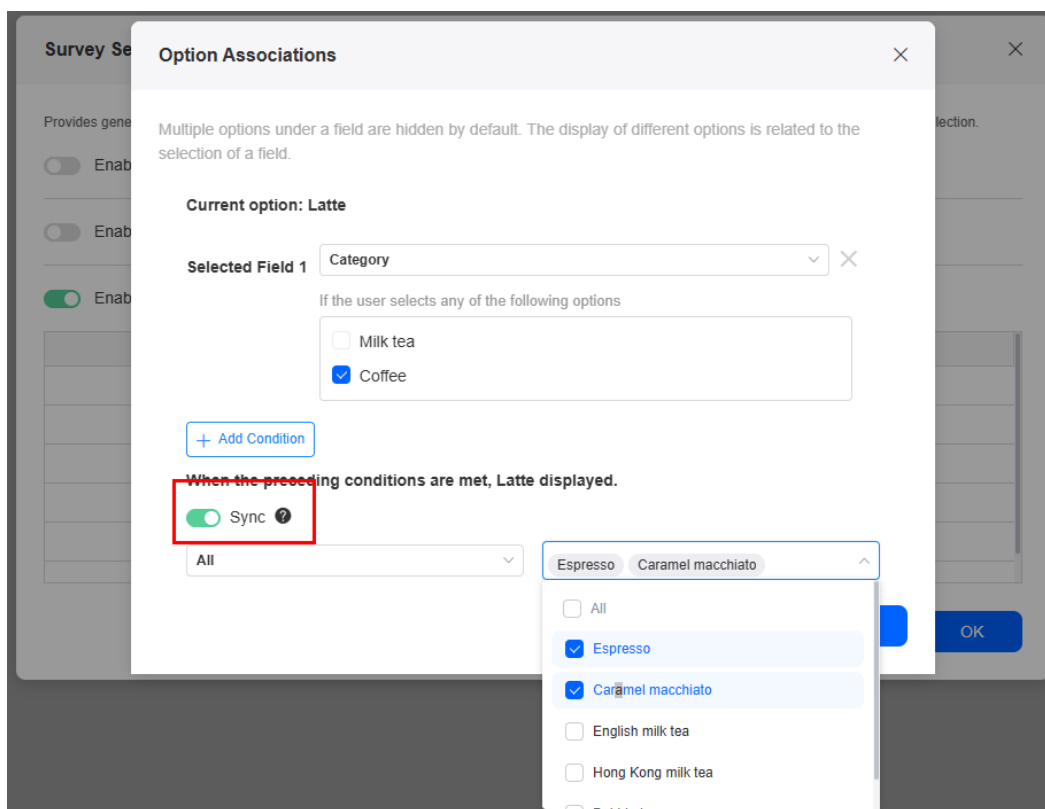
☐ Sync ?

Cancel

OK

Enable **Sync** to associate other options with the coffee category, as shown in [Figure 4-142](#). For example, associate espresso and caramel macchiato with the coffee category.

Figure 4-143 Associating other options



After the synchronization is successful, return to the survey setting page. The values of **Set associations** are changed to **Modify**. Click **Modify** next to espresso. Its category is changed to **Coffee**.

Figure 4-144 Returning to Survey Settings

Survey Settings

Provides general capabilities of questionnaire forms, such as options random and mutually exclusive. Simple steps to set up and play with data collection.

☐

Enable random order

When Enabled, the options of this field appear in a random order during each access.

☐

Enable option scoring

Once enabled, set the score or select an item in the table.

☒

Enable option association

Once enabled, set the option association in the table.

Option content	Set the score	Set associations
Latte		Modify
Espresso		Modify
Caramel macchiato		Modify
English milk tea		Setting
Hong Kong milk tea		Setting
Bubble tea		Setting

Cancel

OK

Figure 4-145 Viewing the modified category

Option Associations

Multiple options under a field are hidden by default. The display of different options is related to the selection of a field.

Current option: Espresso

Selected Field 1

Category

If the user selects any of the following options

☐ Milk tea

☒ Coffee

+ Add Condition

When the preceding conditions are met, Espresso displayed.

☐ Sync

Cancel

OK

Step 4 Set the associated fields of other options of the current field and click the confirm button.

Figure 4-146 Questionnaire mode settings

Survey Settings

Provides general capabilities of questionnaire forms, such as options random and mutually exclusive. Simple steps to set up and play with data collection.

☐ Enable random order When Enabled, the options of this field appear in a random order during each access.

☐ Enable option scoring ? Once enabled, set the score or select an item in the table.

☒ Enable option association ? Once enabled, set the option association in the table.

Latte		Modify
Espresso		Modify
Caramel macchiato		Modify
English milk tea		Setting
Hong Kong milk tea		Setting
Bubble tea		Setting

Cancel OK

Step 5 Click **Save**, return to the application development page, share the form, and view the final effect.

Figure 4-147 Effect

Form 1

Category

☒ Milk tea ☐ Coffee

Option

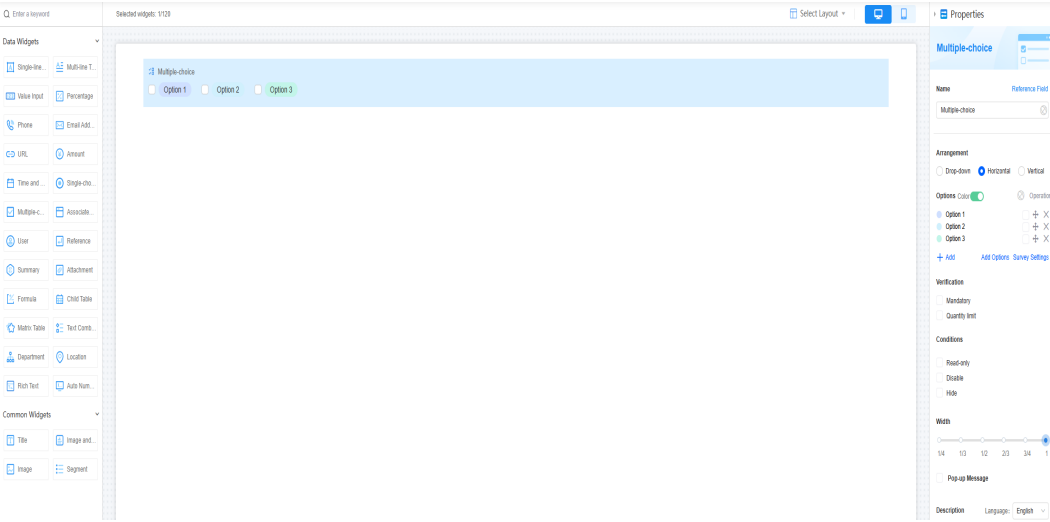
☒ English milk tea ☐ Hong Kong milk tea ☐ Bubble tea

----End

4.6.11 Setting the Properties of the Multi-Choice Widget

This widget lets you pick **one or more** options (up to 12) from a list, like choosing hobbies.

Figure 4-148 Multi-choice widget



Name


Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-149 Setting the field name (Chinese and English)

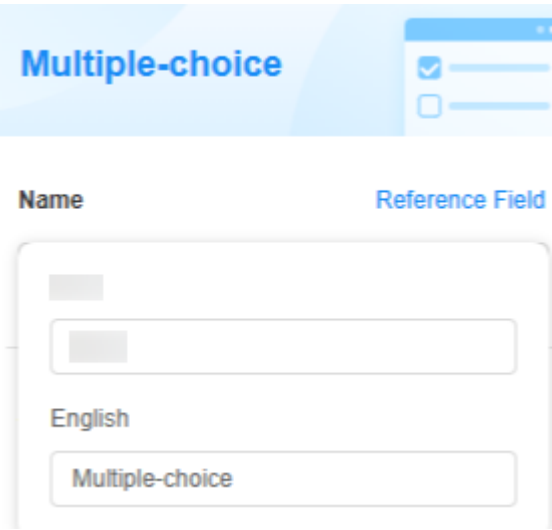


Figure 4-150 Field reference

Reference Field

×

Reference the selected field value to the current field name.

☐ [Q1] Corporate name

☐ [Q2] Company type

☐ [Q3] Multi-line Text

☐ [Q4] Value Input

☐ [Q5] Date of Incorporation

☐ [Q6] Procurement Specialist

☐ [Q7] Assessment status

☐ [Q8] Supplier level

Cancel

Confirm

Arrangement

Choose how the options are arranged: drop-down list, vertical, or horizontal. The default is horizontal.

Figure 4-151 Drop-down

Multiple-choice

Multiple-choice

Name

Reference Field

Multiple-choice

Arrangement

Drop-down

Horizontal

Vertical

Figure 4-152 Horizontal

Multiple-choice

Option 1

Option 2

Option 3

Multiple-choice

Name

Reference Field

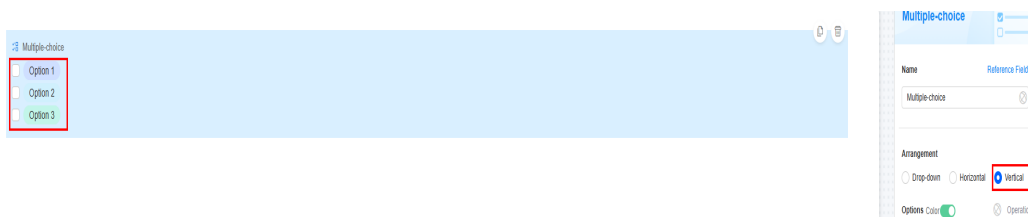
Multiple-choice

Arrangement

Drop-down

Horizontal

Vertical

Figure 4-153 Vertical

Options

Add options for the widget. By default, different options show in different colors.

Click **Add** to add an option. Click the option name (like "Option 1") to rename it.


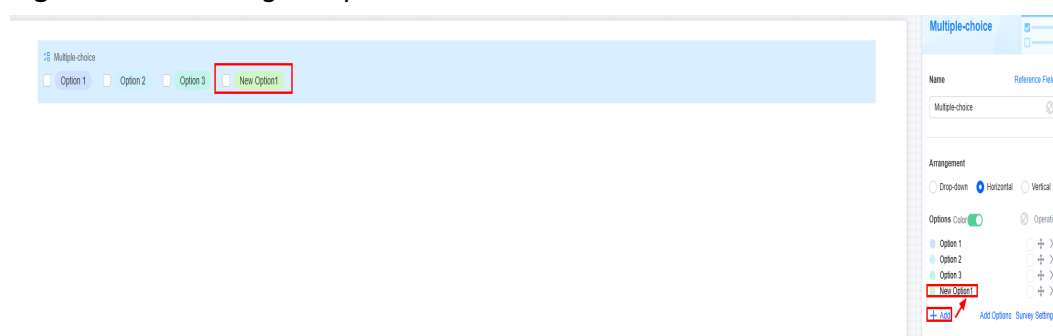
Click ☐ to make it the default choice. Drag  to move an option to the top.

Figure 4-154 Adding an option

Click **Batch Add** to add multiple options. **Each row is an option. An option name can be up to 85 characters long. You can add as many as options as possible. But for a form, you can add up to 12 options.**

Figure 4-155 Adding options in batches

Add Options

Each row represents a unique option. Each option is max. 85 characters.

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Option 8

Option 9

Cancel

OK

Figure 4-156 Effect

Multiple-choice

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Option 8

Option 9

Multiple-choice

Name

Reference Field

Multiple-choice

Arrangement

Drop-down

Horizontal

Vertical

Options Color

Operation

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Option 8

Option 9

+

X

+ Add

Add Options

Survey Settings

Click **Survey Settings** to set whether to enable the following functions: random option display sequence, assign scores, and option associations.

Table 4-11 Survey settings

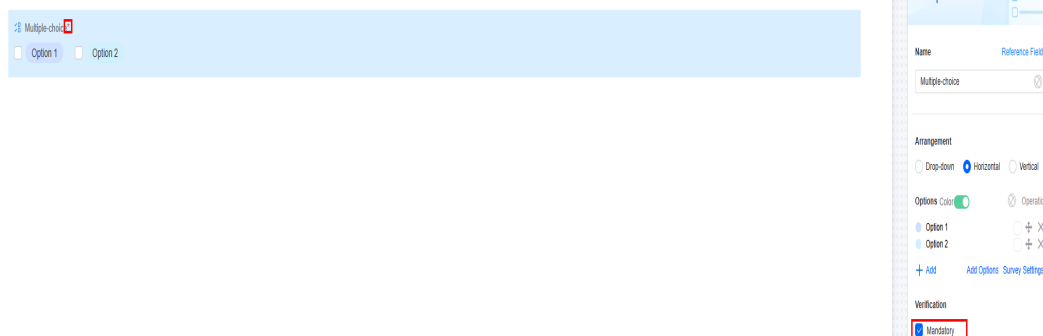
Parameter	Description
Enable random order	When enabled, the options will show up in a different random order each time you access the field.

Parameter	Description
Enable option scoring	<p>Give each option a score. Options with scores can be used in calculations. Choose a scoring method. If enabled, set the scores or select items.</p> <ul style="list-style-type: none">• Each option gets a score: Every option has its own score.• Score only when selected: Only the chosen options will get a score. If you check this option, set the scores for the options.
Enable option association	<p>By default, multiple options are hidden. These options show up based on whether you select options in a previous field. For details, see Setting Option Associations.</p>

Verification

Mandatory: If checked, the field is required and shows a * next to it.

Figure 4-157 Effect



Conditions

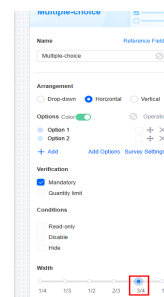
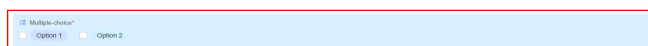
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-158 Setting the widget width



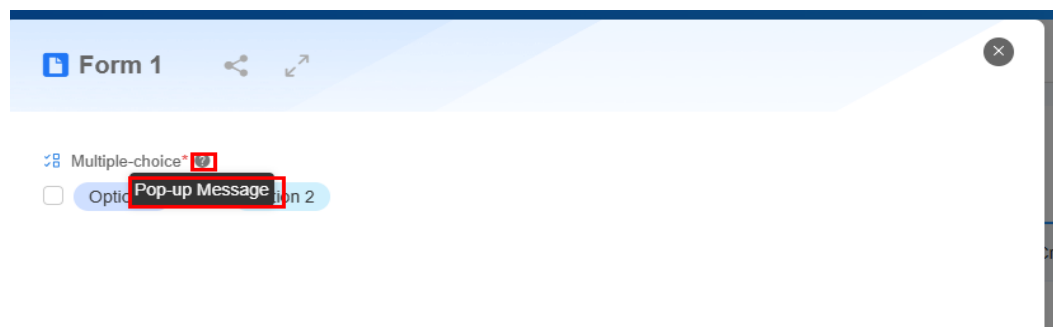
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

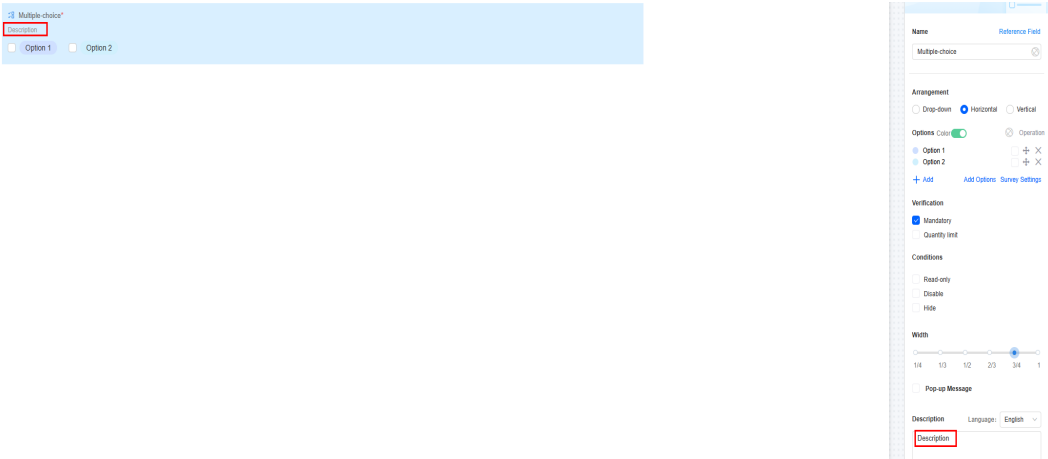
Figure 4-159 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-160 Effect

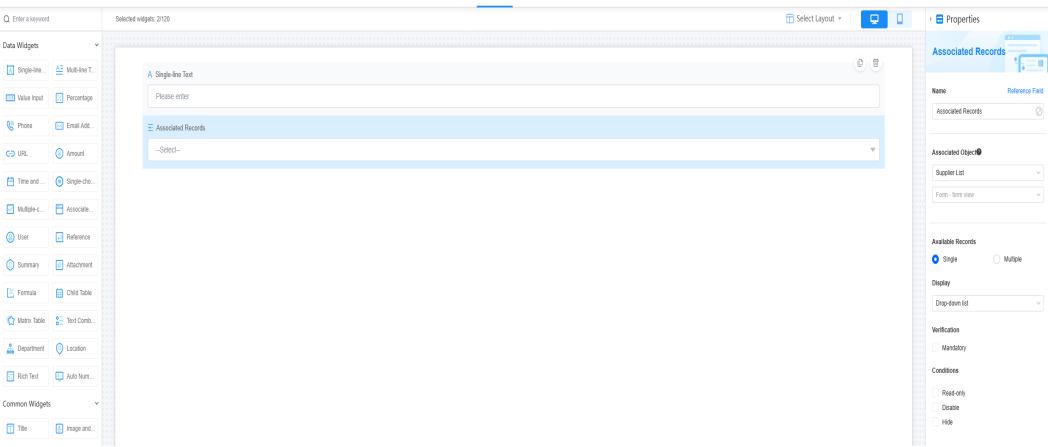


4.6.12 Setting the Properties of the Associated Record Widget

This widget links forms in an application and shows them in single or multi-answer mode.

When you export or clone an application, the form links break. You need to set them up again afterward.

Figure 4-161 Associated record widget



Name


Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-162 Setting the field name (Chinese and English)

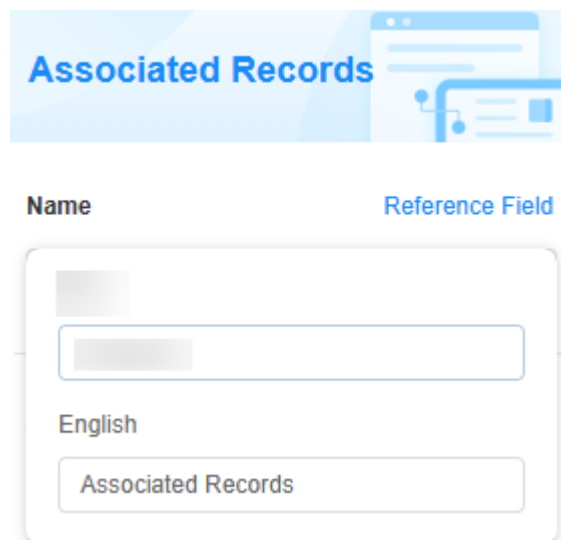
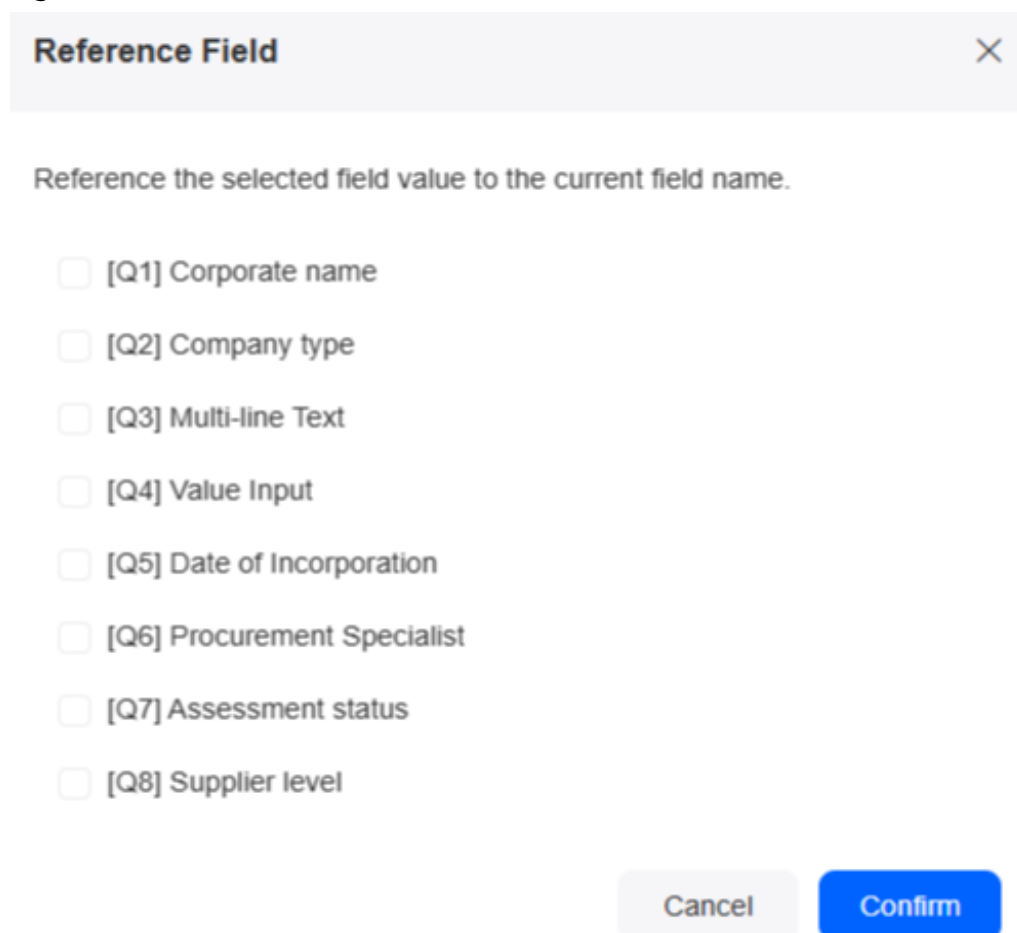


Figure 4-163 Field reference

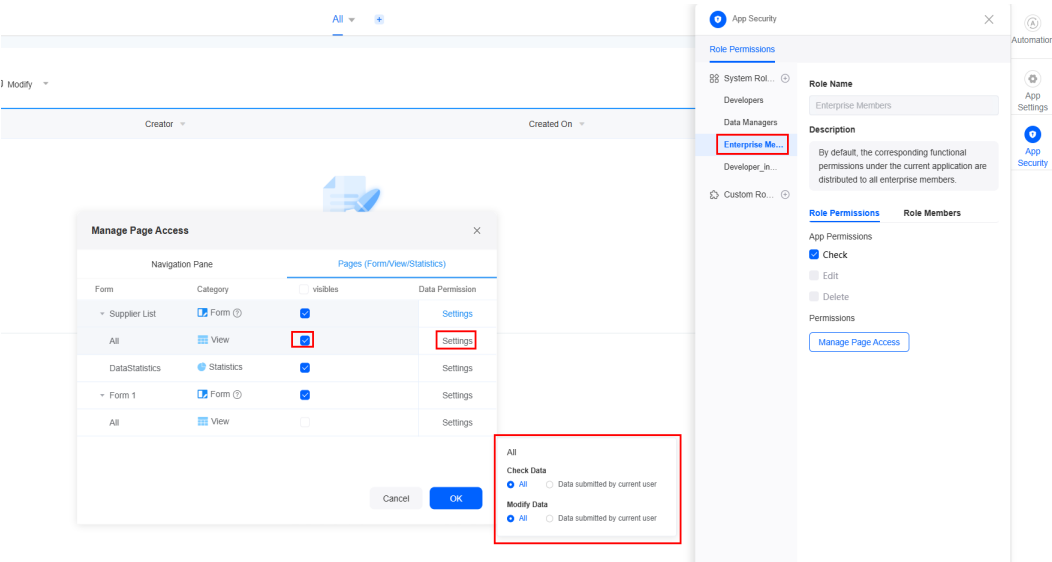


Associated Object

Choose a view page. After setting it up, the view permission is assigned to all enterprise member roles. You can set the viewing scope and rules as required.

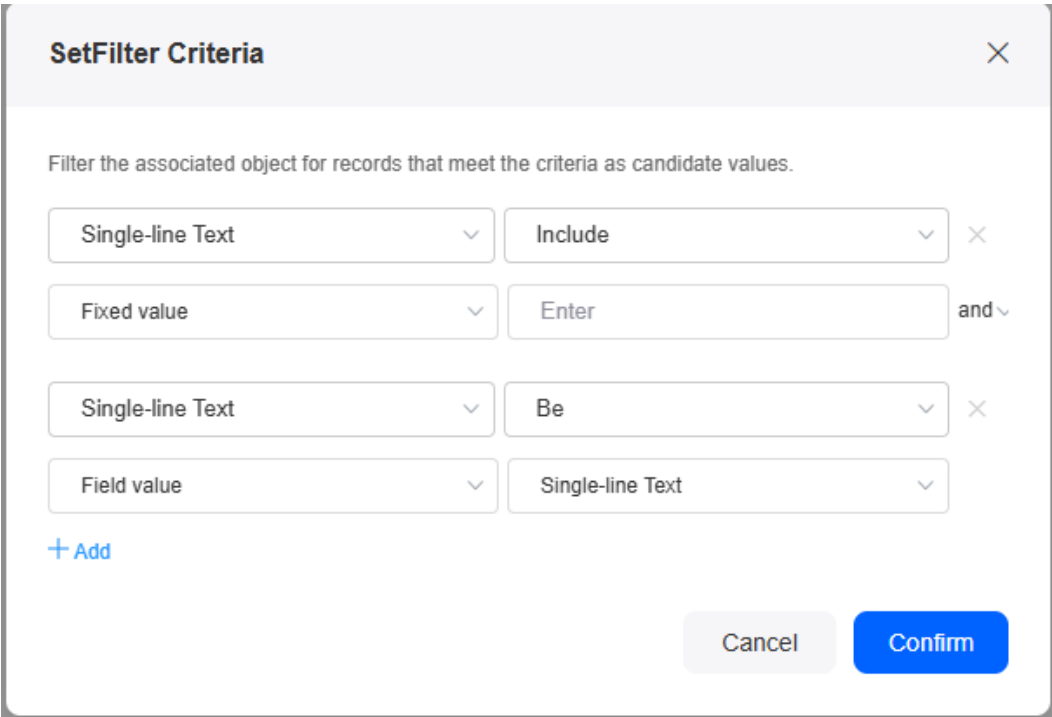
Set the view page to the form view of the current application or a form view of another application. After the setting, the enterprise member role is granted the view visibility and data operation permissions by default, as shown in **Figure 4-164**. **Widgets linked to other applications cannot be cloned. After cloning, set up the links again.**

Figure 4-164 Granting view permissions



After setting the associated object, click the add button to filter the records that meet the filter criteria as candidate values.

Figure 4-165 Setting the filter criteria



Available Records

Set the number of records to select from the associated object as either **Single** or **Multiple**.

Display

Set the display mode of the option values for the associated record widget as either **Drop-down list** or **Option list**.

Figure 4-166 Drop-down list

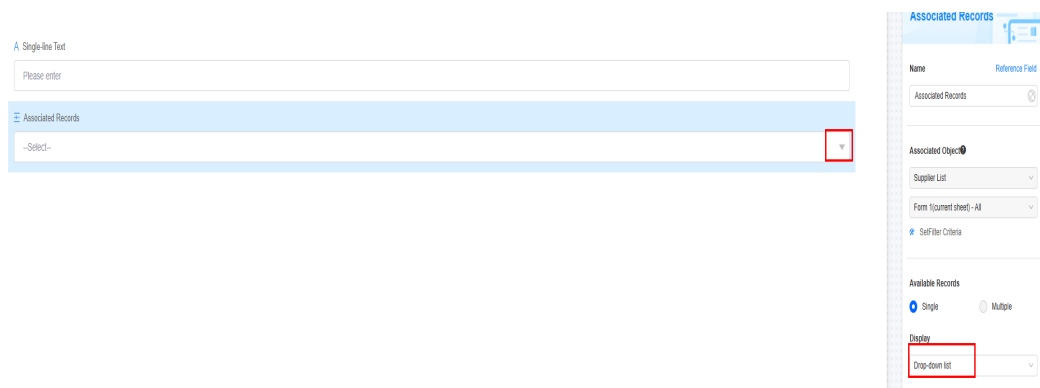
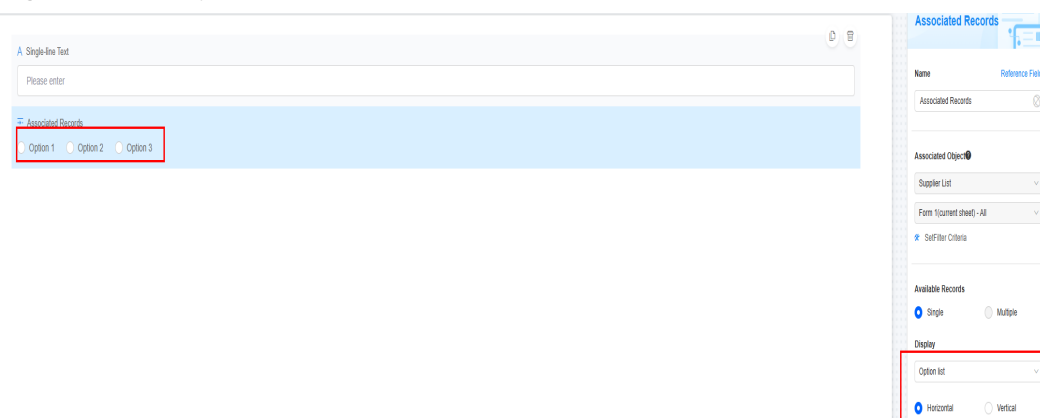


Figure 4-167 Option list



Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Quantity limit:** If **Available Records** is set to **Multiple**, you can set a minimum and maximum quantity. For example, if order A is associated with product B and the quantity limit is set to 1 to 10, a user must select 1 to 10 products when creating an order.

Figure 4-168 Limiting the number of selected items

Available Records

☐ Single ☒ Multiple

Display

Drop-down list

Verification

☐ Mandatory

☒ Quantity limit 1 ~ 10

Conditions

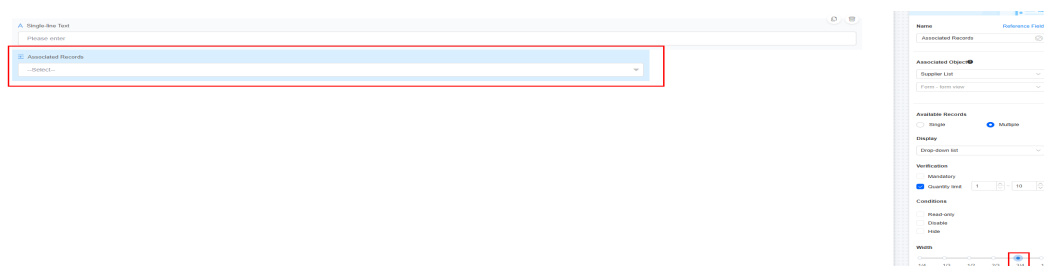
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only**: If checked, the field is read-only.
- **Disable**: If checked, the field shows but cannot be edited.
- **Hide**: If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-169 Setting the widget width

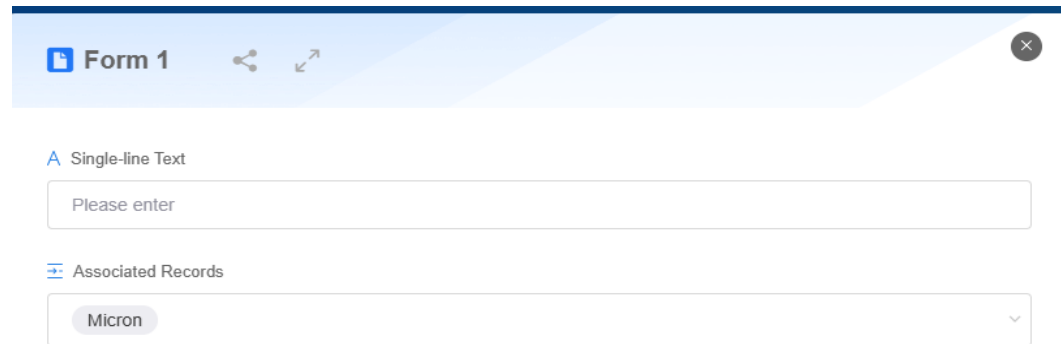


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget. This reduces user input, speeds up processes, and ensures data integrity and consistency.

Figure 4-170 Default value



Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

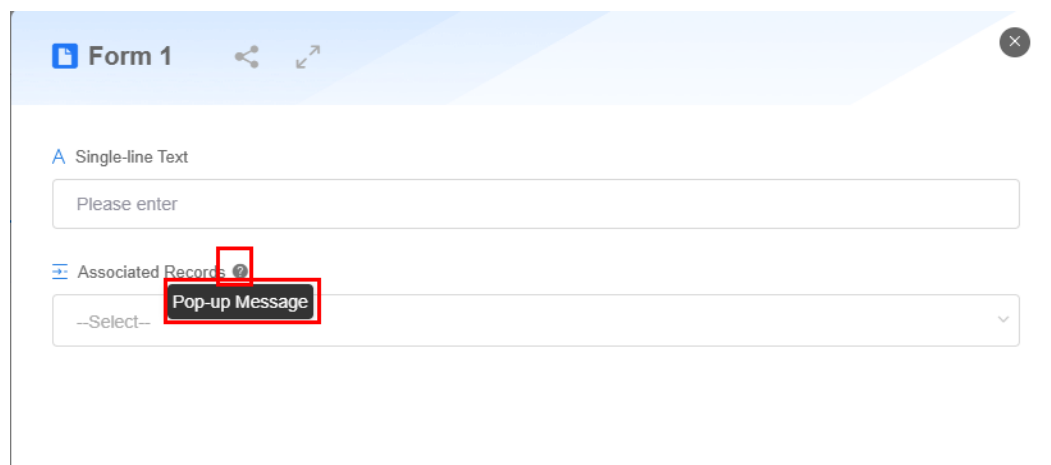
Figure 4-171 Setting the guide prompt

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

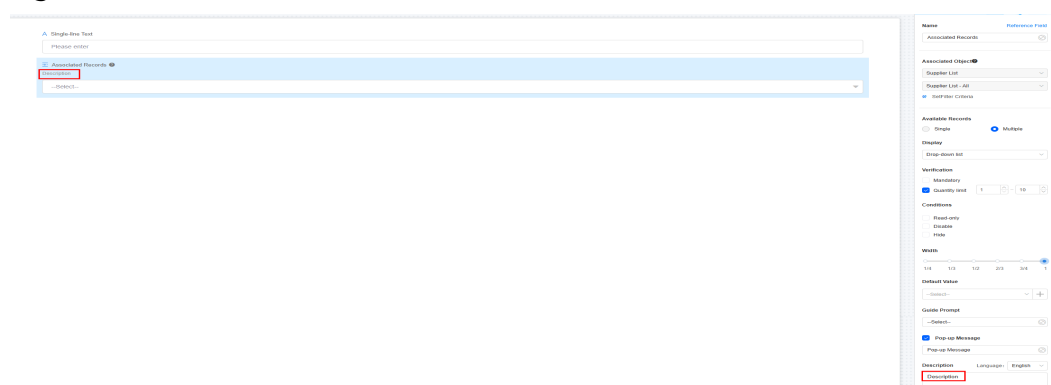
Figure 4-172 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

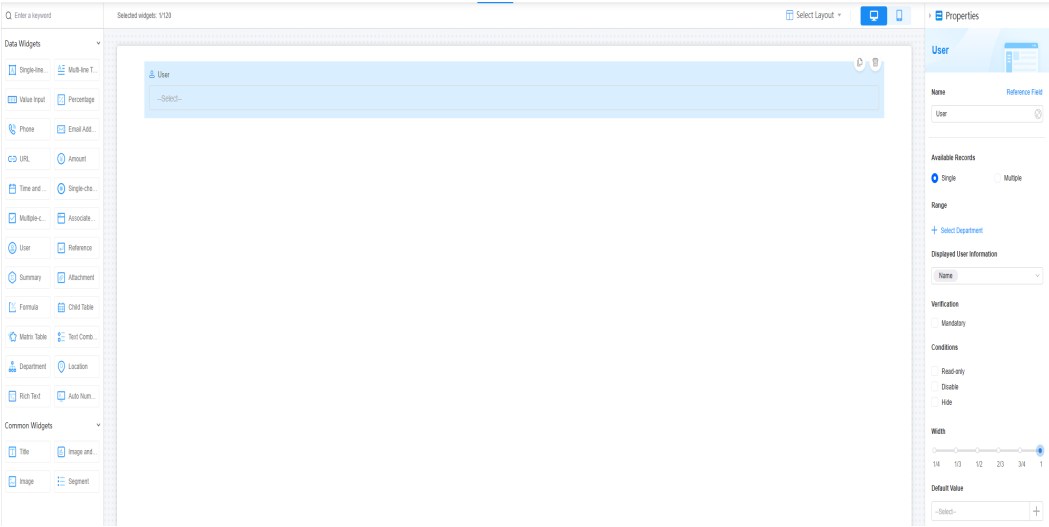
Figure 4-173 Effect



4.6.13 Setting the Properties of the User Widget

This widget gets people's information from a company contact list. You can use it to set the travel applicant, asset owner, maintenance personnel, and approver for a process form.

Figure 4-174 User widget



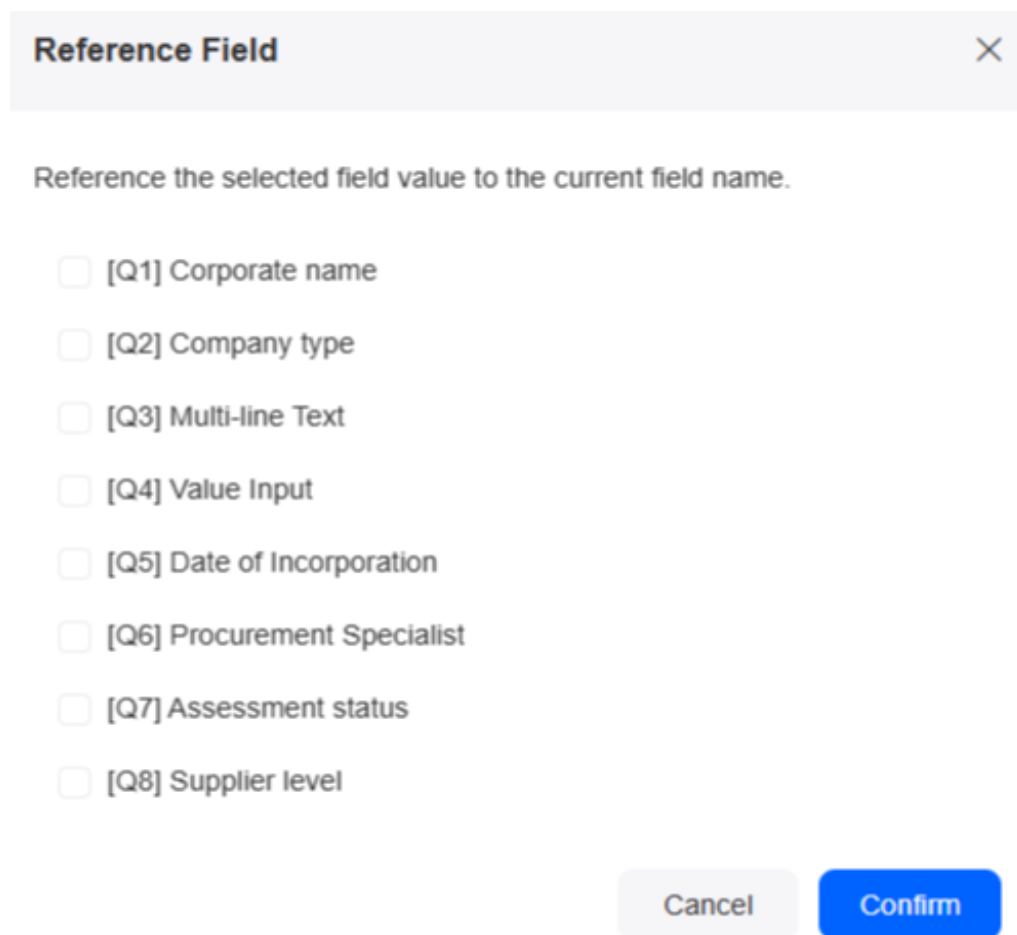
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-175 Setting the field name (Chinese and English)



Figure 4-176 Field reference



Reference Field ✕

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

Cancel Confirm

Selected Records

The number of records that can be selected at a time. **Single** and **Multiple** are supported.

Range

Set the widget's user source option. You can add users by member, role, or department.


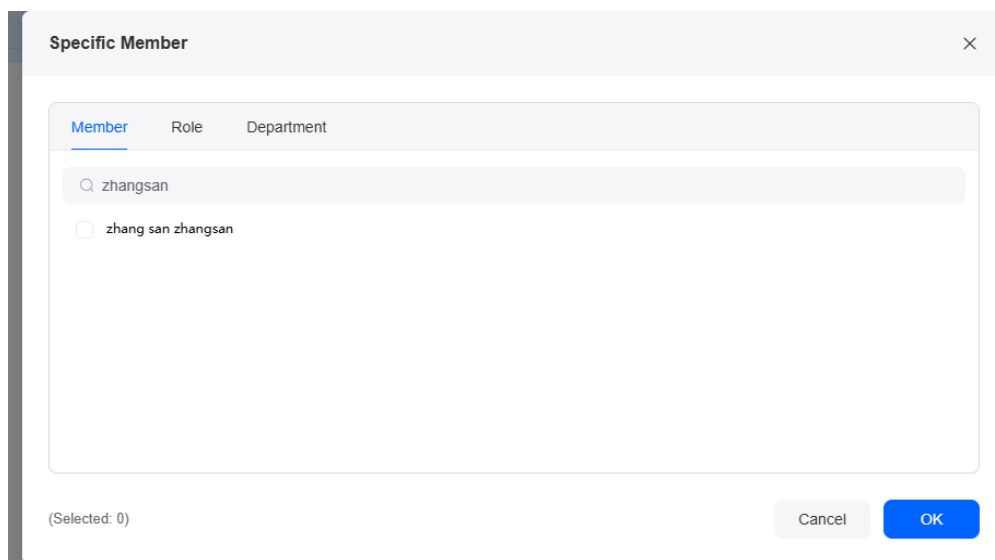
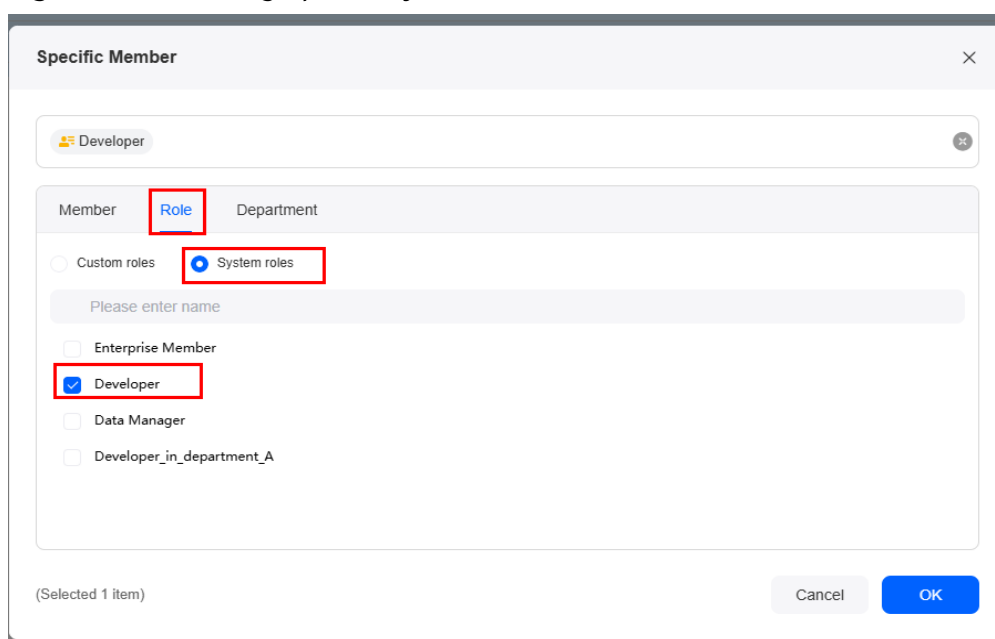
- By member: Add options by member. In the search box, enter the name or username of the member to be added and click . Choose the searched member and confirm the operation. The members added here must be queryable in the configuration center.

Figure 4-177 Adding option by member



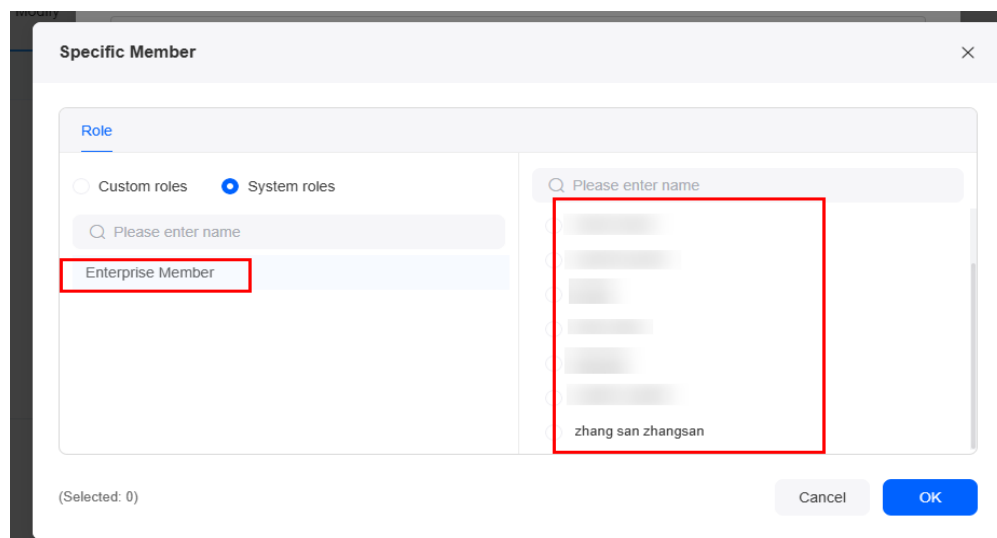
- By role: Add options using custom roles or system roles. Custom roles are roles created by a developer in the configuration center. For details, see [Customizing a System-Level Role](#).

Figure 4-178 Adding options by role



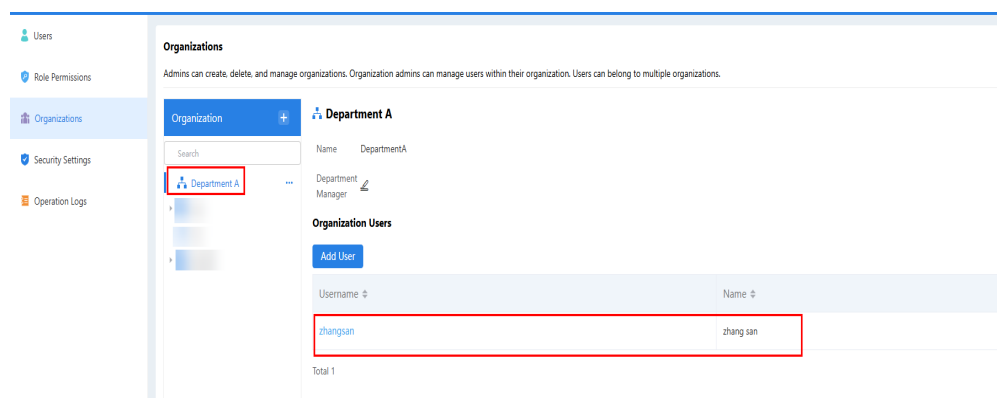
For example, when creating a form, you can set the available options of the user widget to enterprise user under the system role. Users who belong to the enterprise member role can be selected.

Figure 4-179 Effect



- By department: Add options by department. The department must be created in the configuration center in advance. For example, create "Department A" in the configuration center and add user "Zhang San".

Figure 4-180 Creating department A



When developing a form, set the user widget range to **Department** and select the "Department A" created in the configuration center. When filling in the form, you can select "Zhang San" in "Department A". If additional users are added to "Department A", they will also be available for selection.

Figure 4-181 Selecting department A

The screenshot shows a 'Specific Member' dialog box with a close button (X) in the top right. Below the title bar is a search bar containing 'Enterprise Member'. Below that are three tabs: 'Member', 'Role', and 'Department', with 'Department' being the active tab. A checkbox labeled 'Include sub-departments of the selected department' is checked and highlighted with a red box. Below this is a search bar containing 'Department A' (highlighted with a red box). Below the search bar is a list of results, with 'Department A' (highlighted with a red box) being the only item. At the bottom left, it says '(Selected 1 item)'. At the bottom right are 'Cancel' and 'OK' buttons.

Figure 4-182 Selecting a user from department A when filling in a form

The screenshot shows a 'Specific Member' dialog box with a close button (X) in the top right. Below the title bar is a search bar containing 'zhang san'. Below that are three tabs: 'Member', 'Role', and 'Department', with 'Department' being the active tab. Below the tabs is a search bar containing 'zhang san zhangsan' (highlighted with a red box). Below the search bar is a list of results, with 'Department A' (highlighted with a red box) being the only item. At the bottom left, it says '(Selected 1 item)'. At the bottom right are 'Cancel' and 'OK' buttons.

Displayed User Information

Choose which user details to show, like **Name** and **Account**. When you search for a username on the data filling page, the user's department shows up. This helps tell apart users with the same name by their department.

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Quantity limit:** If **Available Records** is set to **Multiple**, you can set a minimum and maximum quantity. For example, when creating a group for different types of users, you can set the quantity limit to 1 to 5. This means at least one user must be selected, and up to five users can be selected.

Figure 4-183 Limiting the number of selected items

Available Records

☐ Single ☒ Multiple

Range

+ Select Department

Displayed User Information

Name

Verification

☐ Mandatory

☒ Quantity limit 1 ~ 5

Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only**: If checked, the field is read-only.
- **Disable**: If checked, the field shows but cannot be edited.
- **Hide**: If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-184 Setting the widget width

Width

1/4 1/3 1/2 1

- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.

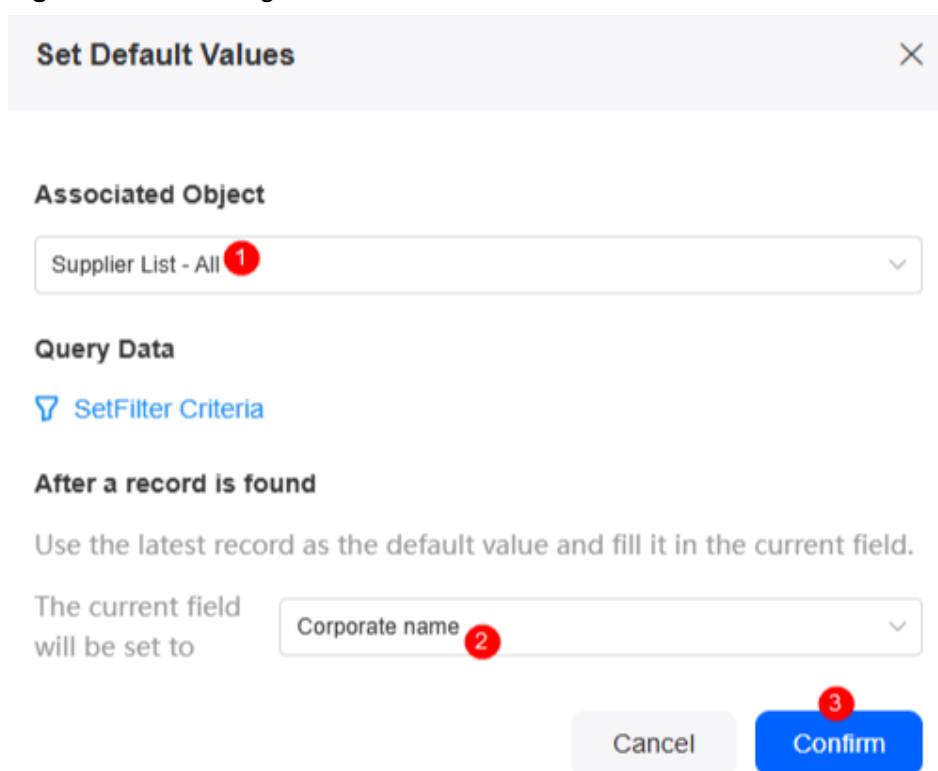
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget. This reduces user input, speeds up processes, and ensures data integrity and consistency.

- Current login user: You can use the current user as the default value.
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-185 Setting the default value



Set Default Values [Close]

Associated Object

Supplier List - All 1

Query Data

[SetFilter Criteria](#)

After a record is found

Use the latest record as the default value and fill it in the current field.

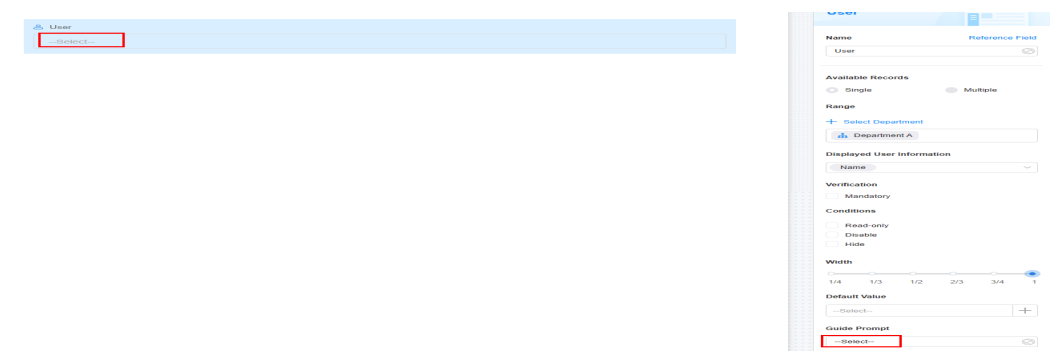
The current field will be set to Corporate name 2

Cancel 3 Confirm

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

Figure 4-186 Setting the guide prompt

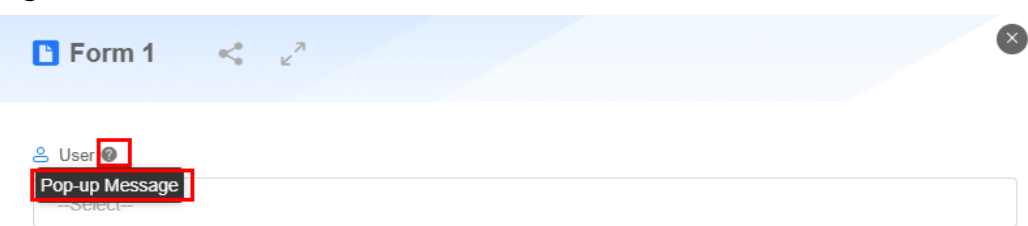


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

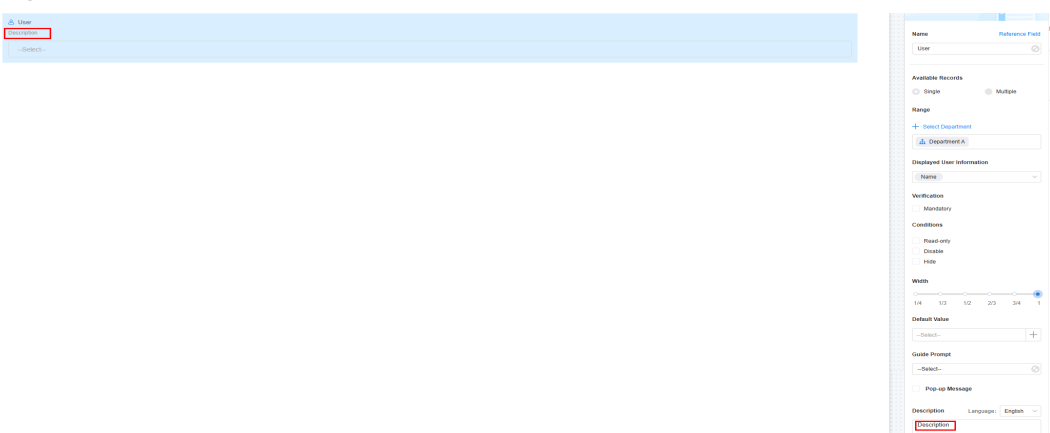
Figure 4-187 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

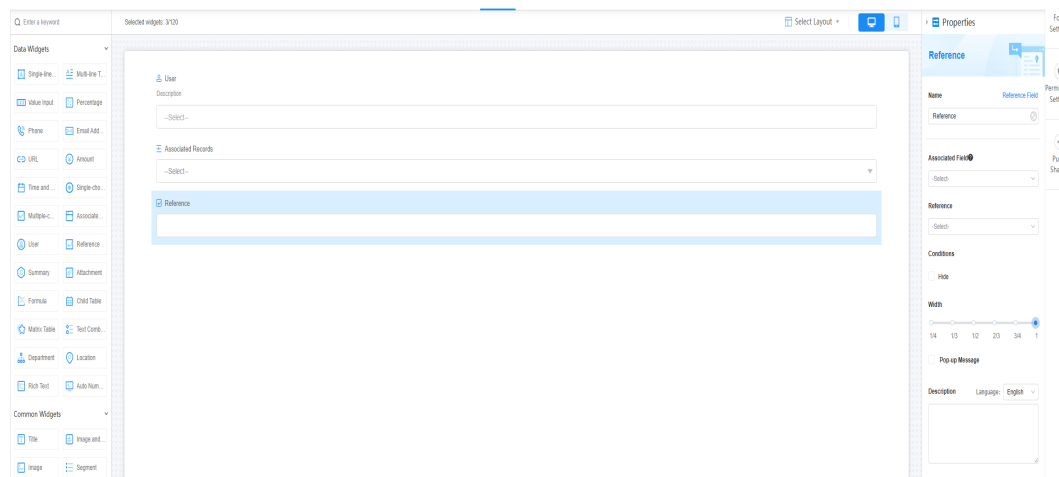
Figure 4-188 Effect



4.6.14 Set the Properties of the Reference Widget

This widget shows a field from a linked record on the current page. To use this widget, ensure that the associated record widget has been used on the page. (See [Setting the Properties of the Associated Record Widget.](#))

Figure 4-189 Reference widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-190 Setting the field name (Chinese and English)



Figure 4-191 Field reference

Reference Field

Reference the selected field value to the current field name.

☐ [Q1] Corporate name

☐ [Q2] Company type

☐ [Q3] Multi-line Text

☐ [Q4] Value Input

☐ [Q5] Date of Incorporation

☐ [Q6] Procurement Specialist

☐ [Q7] Assessment status

☐ [Q8] Supplier level

Cancel

Confirm

Associated Field

Select the associated record widget on the current page. The **Available Records** parameter for this widget must be set to **Single**.

Figure 4-192 Single for Available Records

User

Description

--Select--

Associated Records

--Select--

Reference

Associated Records

Name

Reference Field

Associated Records

Associated Object

Supplier List

Supplier List - All

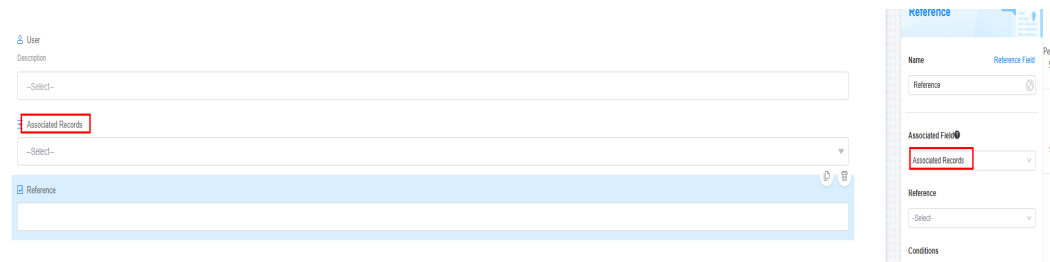
SelfFilter Criteria

Available Records

Single

Multiple

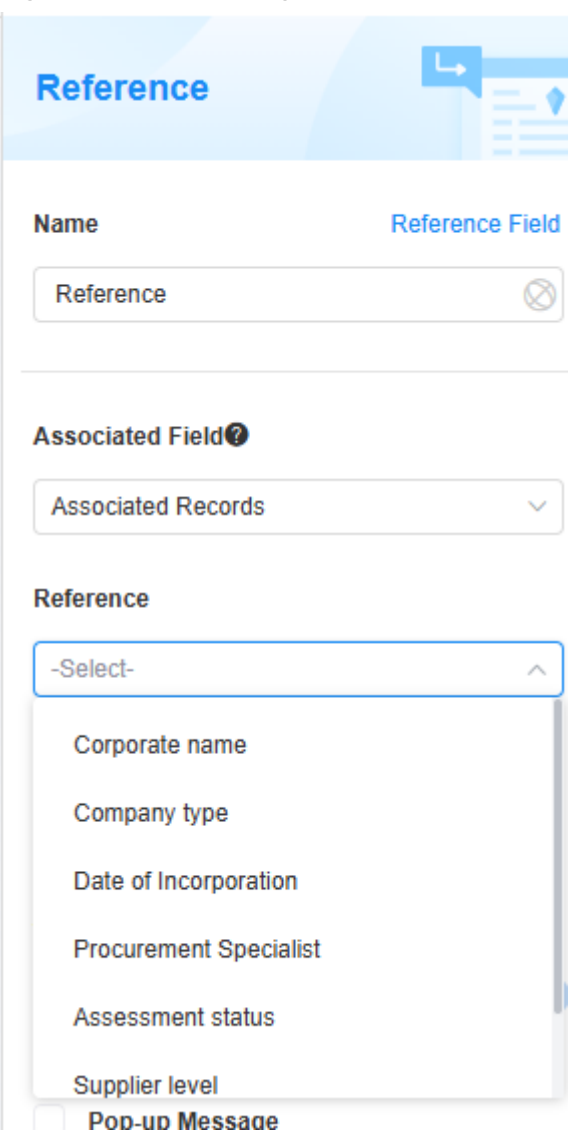
Figure 4-193 Choosing an associated record on the current page



Reference

Choose a field to reference from the association.

Figure 4-194 Choosing a field



Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-195 Hiding a field

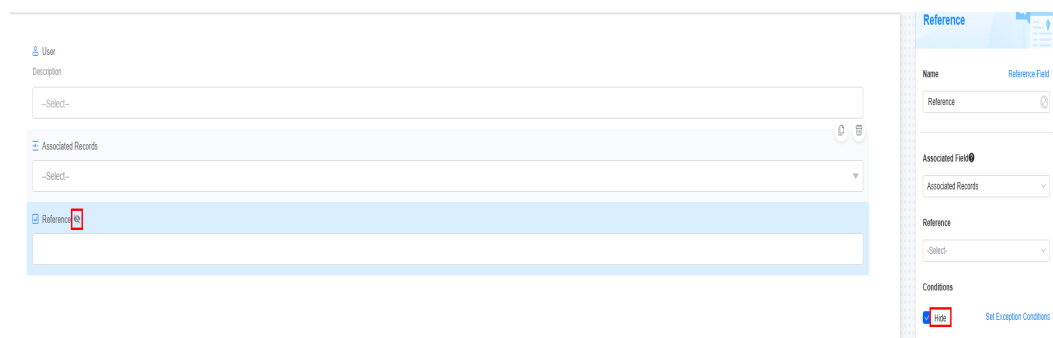
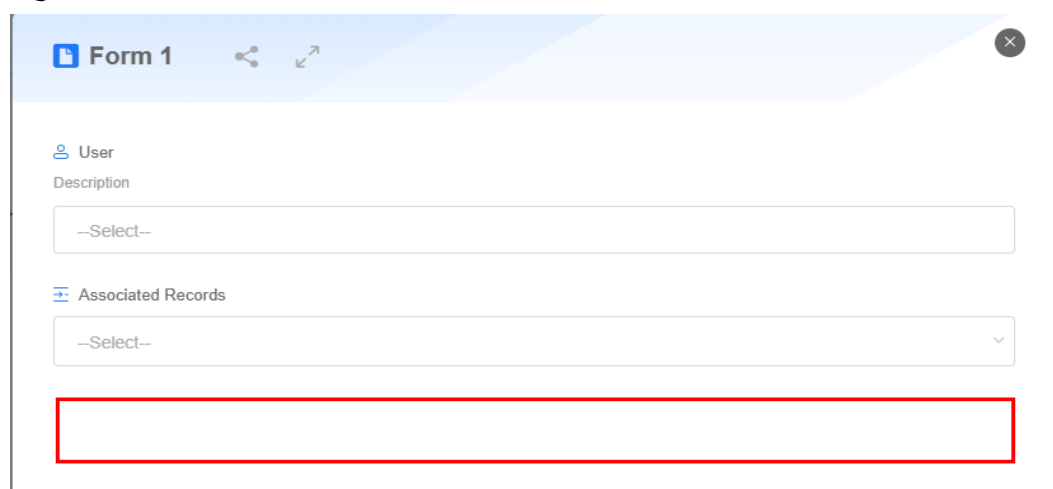


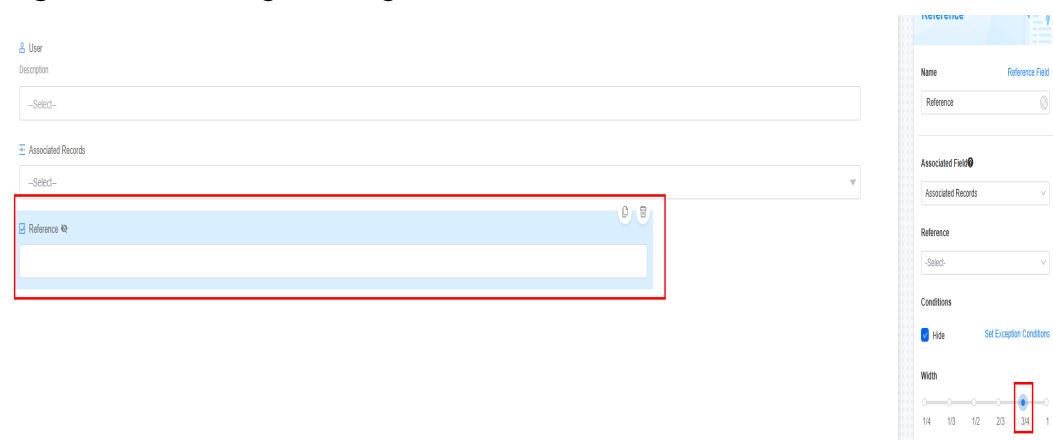
Figure 4-196 Effect



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-197 Setting the widget width



- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.

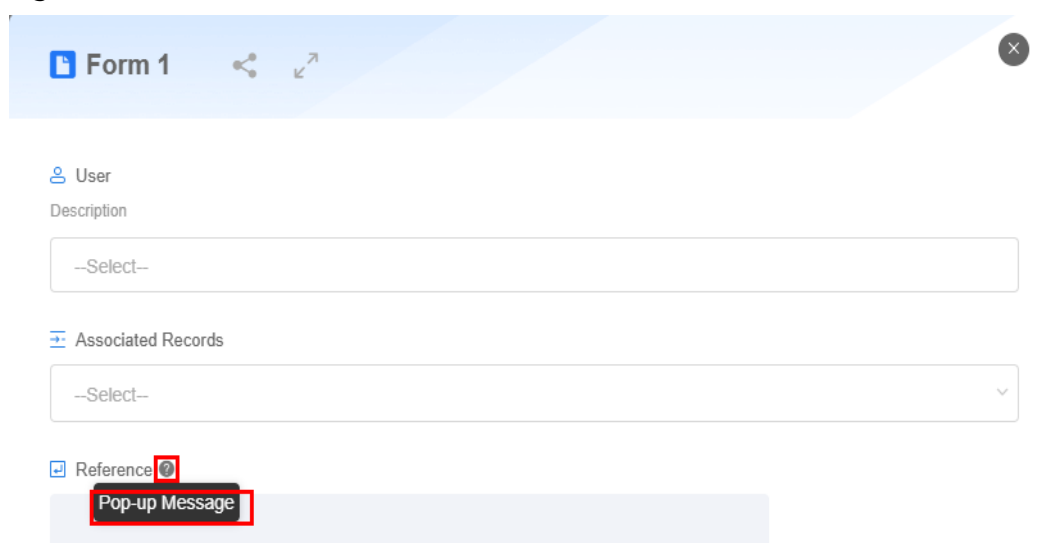
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

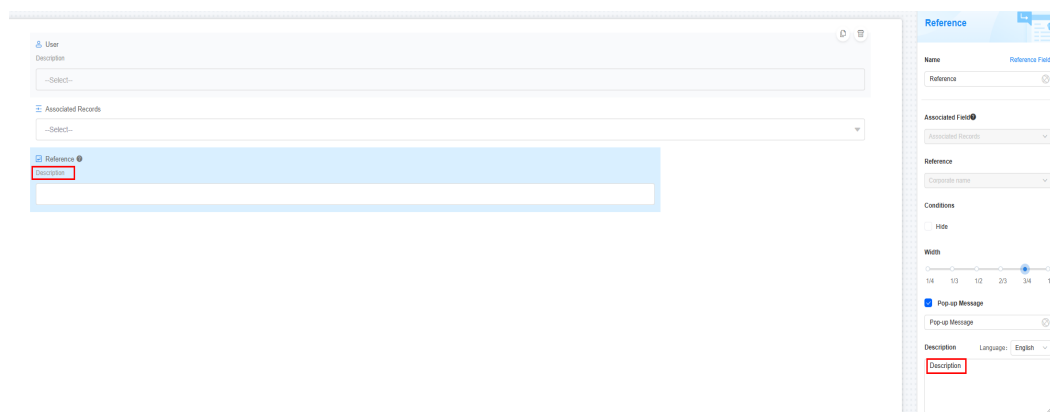
Figure 4-198 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-199 Effect

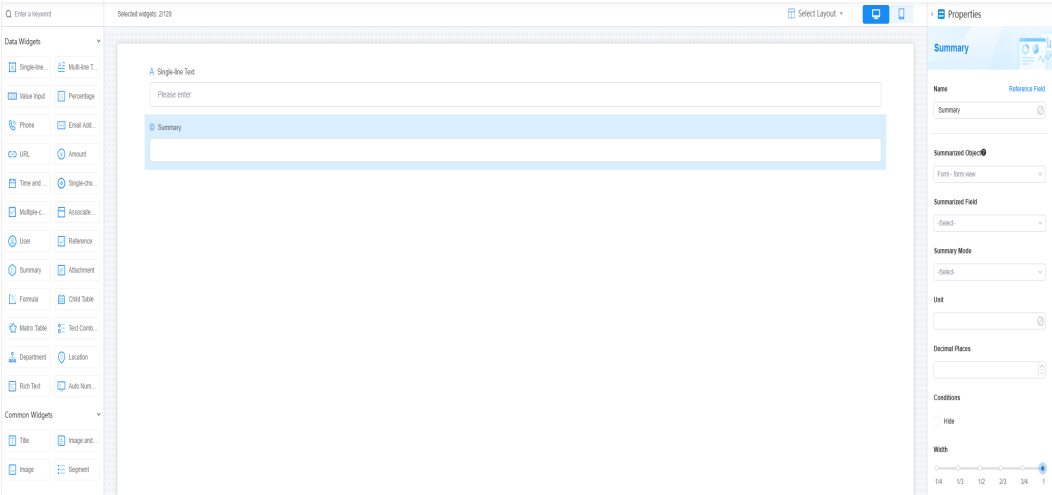


4.6.15 Set the Properties of the Summary Widget

This widget shows the total number of fields or records in forms related to this one.

To use this widget, link another form to the current form using the associated record widget (see [Setting the Properties of the Associated Record Widget](#)). This allows you to summarize records from the linked form.

Figure 4-200 Summary widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-201 Setting the field name (Chinese and English)

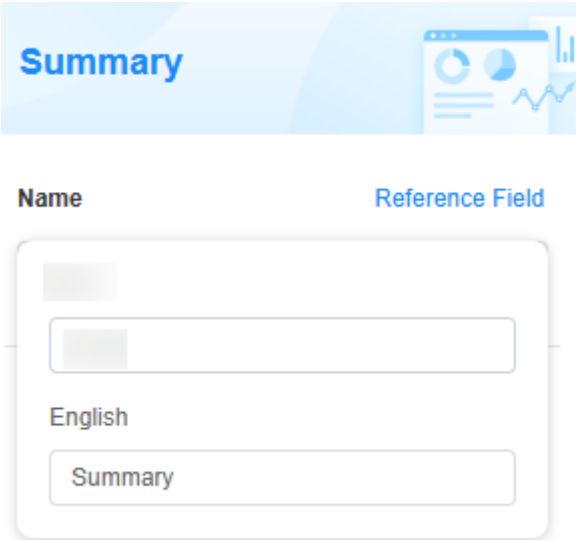


Figure 4-202 Field reference

Reference Field

Reference the selected field value to the current field name.

☐ [Q1] Corporate name

☐ [Q2] Company type

☐ [Q3] Multi-line Text

☐ [Q4] Value Input

☐ [Q5] Date of Incorporation

☐ [Q6] Procurement Specialist

☐ [Q7] Assessment status

☐ [Q8] Supplier level

Cancel

Confirm

Summarized Object

To summarize records from another form, create a new form and link it to the current form using the associated record widget. For example, to summarize data from form B in form A, add an associated record widget to form B to link it to form A. Then, drag a summary widget to form A to display the summarized data from form B.

Figure 4-203 Linking form B to form A using the associated record widget

Q Enter a keyword

Selected widgets: 7/123

Select Layout

Properties

Data Widgets

Single line

Multi-line T

Value Input

Percentage

Phone

Email Addr

URL

Amount

Time and

Single-cho

Multiple-c

Associate

User

Reference

Summary

Attachment

Formula

Grid Table

Matrix Table

Text Comp

Department

Location

Rich Text

Auto Num

Common Widgets

Title

Image and

Image

Segment

A Corporate name

Please enter

A Company type

Sole foreign investment

Selected company

Limited by shares

A Date of Incorporation

--Select--

A Procurement Specialist

Please enter

A Assessment status

In assessment

Assessment completed

A Supplier level

gold medal

excellent

optimum

Associated Records

--Select--

Associated Records

Name

Reference Field

Associated Records

Associated Objects

Supplier List

Form 1-48

Self-Filter Criteria

Available Records

Single

Multiple

Display

Drop-down list

Verification

Mandatory

Conditions

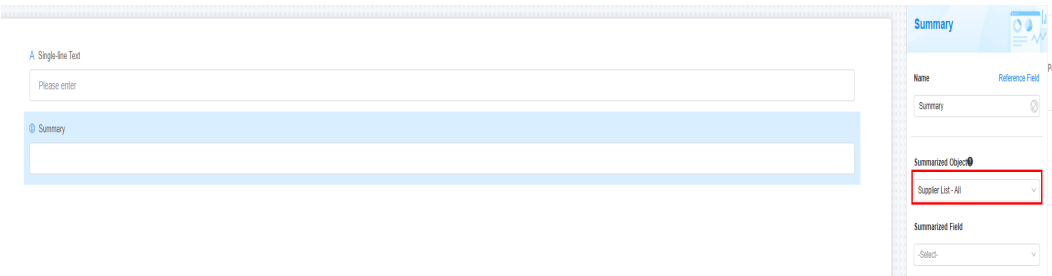
Read-only

Disable

Hide

Watch

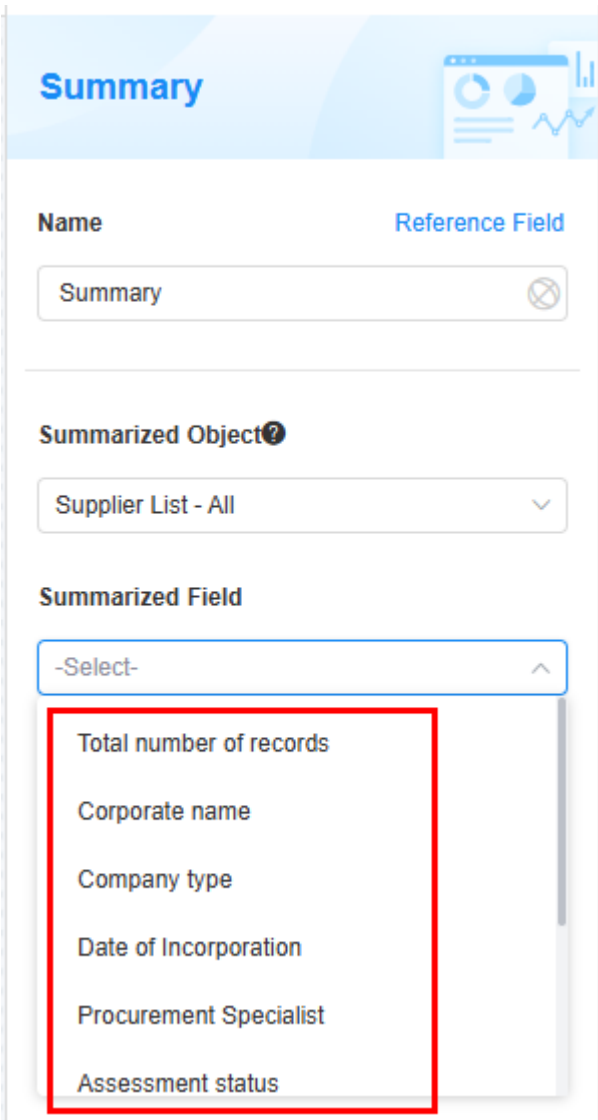
Figure 4-204 Summarizing data from form B in form A



Summarized Field

Choose fields for summarization.

Figure 4-205 Choosing fields for summarization



Summary Mode

Select the summary mode of the field. The options are **Unfilled count**, **Filled count**, and **Deduplicate count**.

- **Unfilled count**: The number of records where the field is empty. It is calculated by subtracting the number of filled records from the total number of records.
- **Filled count**: The number of records where the field is not empty. It is calculated by subtracting the number of unfilled records from the total number of records.
- **Deduplicate count**: The number of records that have non-empty fields with unique values.

For example, in an applet registration record, there are 80 users in total. Among them, 20 users did not enter phone numbers during registration. Out of the remaining 60 users who did enter phone numbers, 5 users have the same phone number. After removing duplicates, the count of unique phone numbers is 55.

Unit

Set the unit for the summary result to make it easier to read. For example, use dollars for sales amounts.

Figure 4-206 Setting the unit of the summary result

The image shows a configuration panel with two sections. The first section, titled 'Summary Mode', contains a dropdown menu currently set to 'Unfilled count'. The second section, titled 'Unit', contains a dropdown menu currently set to 'USD'. Both dropdowns have a small icon on the right side to indicate they are expandable.

Decimal Places

Set the number of decimal places to keep in the summary result. The range is [0, 10]. By default, it's blank, meaning no decimal places are shown.

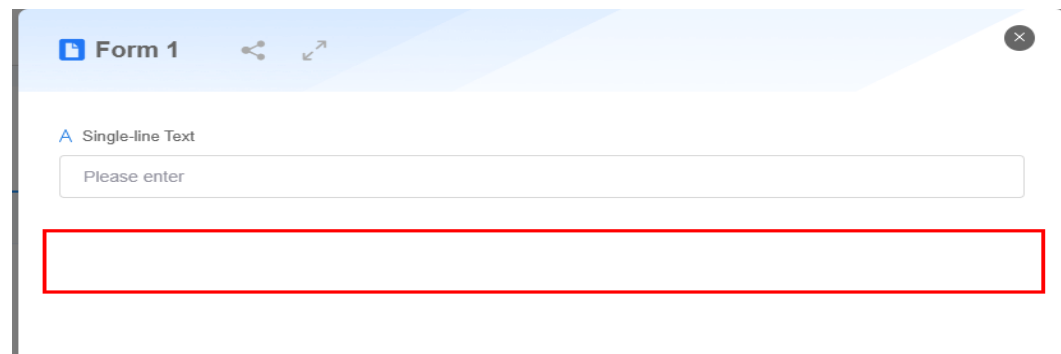
Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-207 Hiding a field

The image shows a configuration panel for a field. On the left, there is a list of fields with a 'Hide' checkbox next to one of them. On the right, there is a detailed configuration panel for the selected field, which includes options for 'Summary Mode', 'Unit', 'Decimal Places', and 'Conditions'. The 'Hide' checkbox is checked, indicating the field will be hidden on the page.

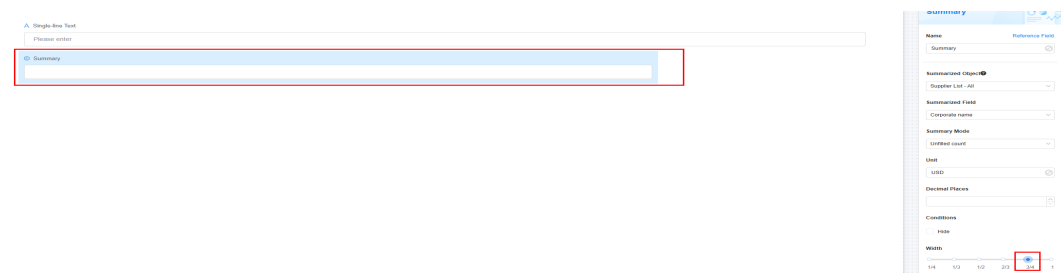
Figure 4-208 Effect



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-209 Setting the widget width

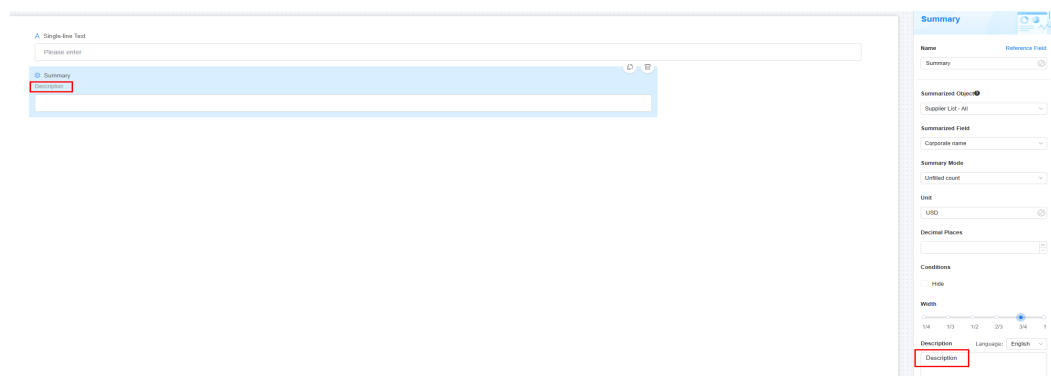


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

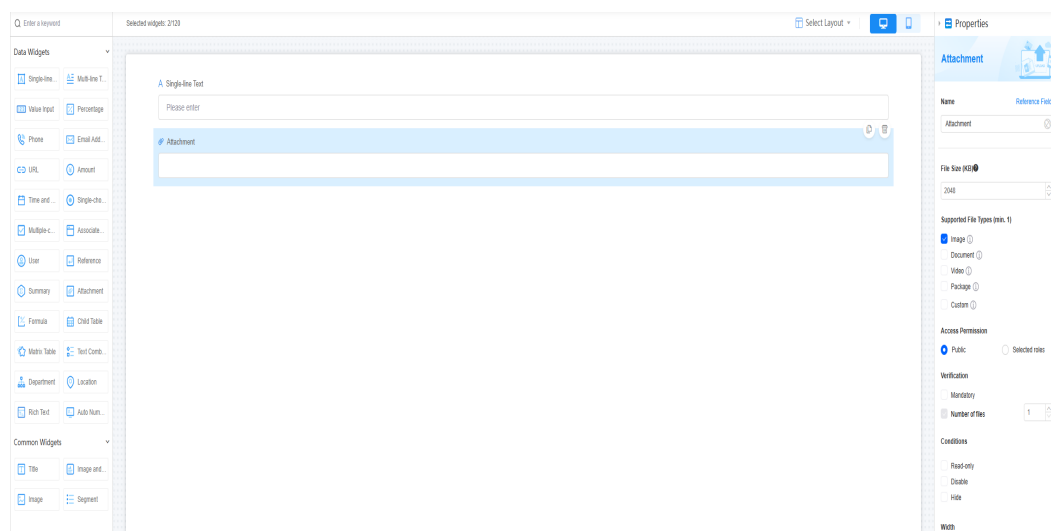
Figure 4-210 Effect



4.6.16 Set the Properties of the Attachment Widget

This widget is for uploading certificate photos. You can upload by clicking or dragging an attachment.

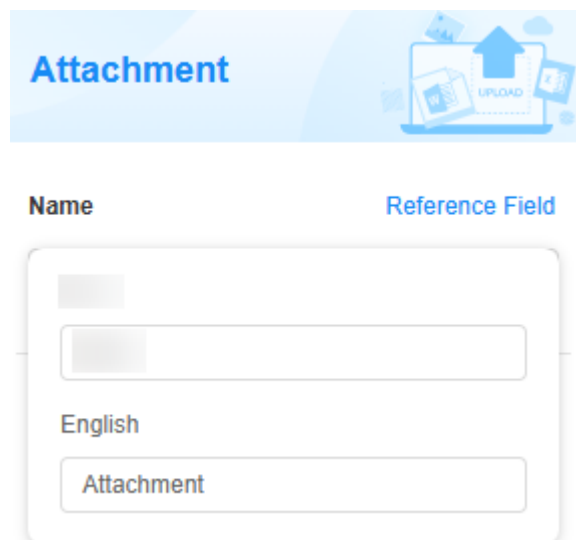
Figure 4-211 Attachment widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-212 Setting the field name (Chinese and English)



Attachment

Name [Reference Field](#)

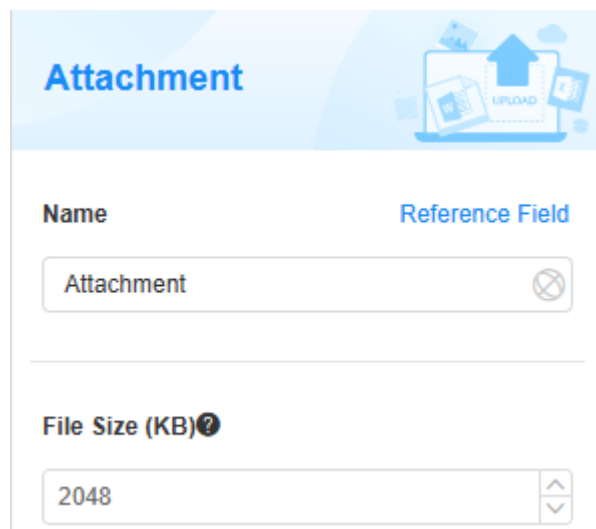
English

Attachment

File Size

Set the maximum file size for uploads. The maximum value is 204,800 KB, with a default of 2,048 KB.

Figure 4-213 Setting the file size



Attachment

Name [Reference Field](#)

Attachment

File Size (KB) ?

2048

Supported File Types

Set the supported file types for upload. At least one file type must be selected. Supported file types include:

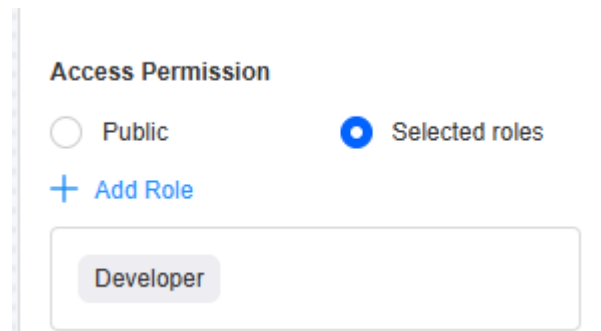
- Image: PNG, JPG, JPEG, GIF
- Document: PDF, DOC, DOCX, XLS, XLSX, PPT, PPTX, TXT, HTM, XML
- Video: MP4, MKV, SWF, WMV, MPG, RMVB, AVI
- Package: ZIP, RAR
- Custom: User-defined extensions like .wps, .gz, .7z, .msg

Access Permission

Set the access permission for the attachment. Options are:

- **Public:** Accessible to all users.
- **Selected roles:** Only users with specified roles can access the file. If no role is selected, the minimum permission is used.

Figure 4-214 Accessible to developers



Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Number of files:** Maximum number of attachments that can be uploaded. The range is [1, 10]. Default is 1.

Conditions

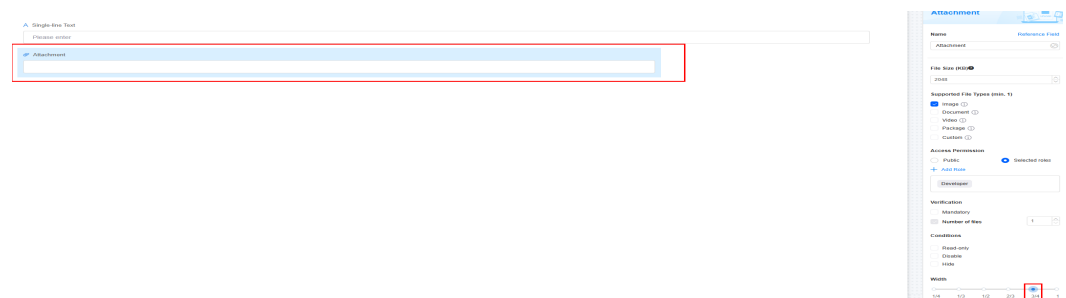
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-215 Setting the widget width

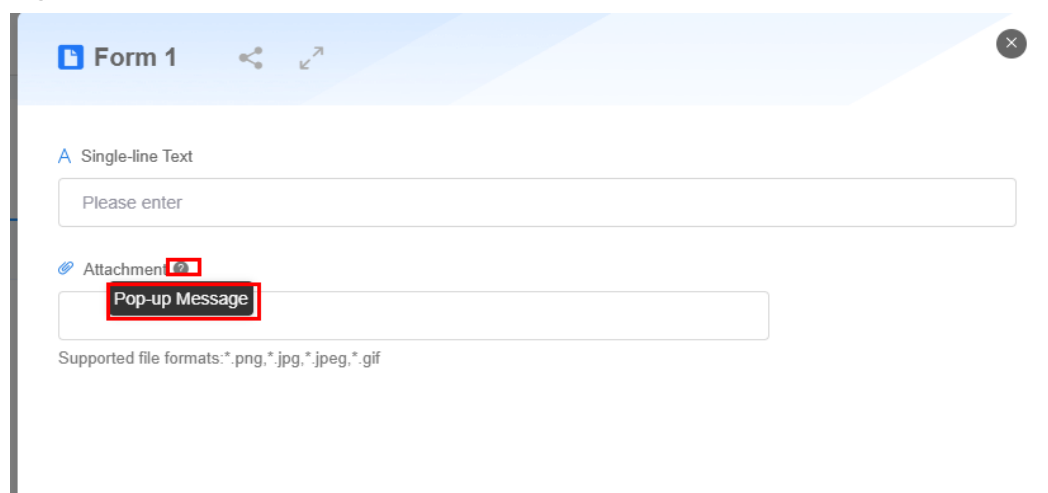


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

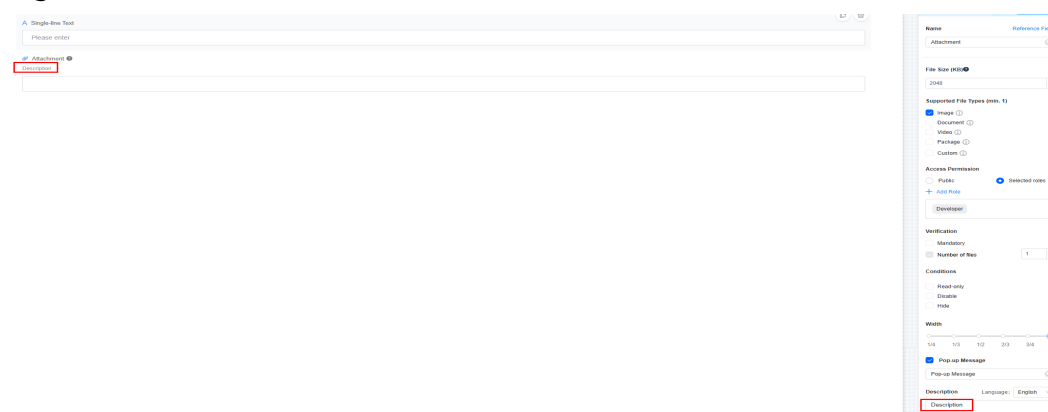
Figure 4-216 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

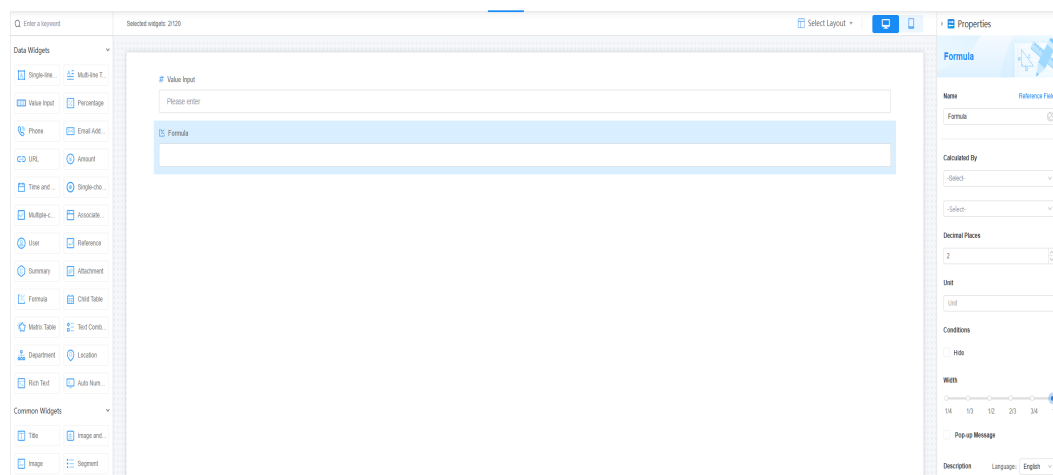
Figure 4-217 Effect



4.6.17 Setting the Properties of the Formula Widget

This widget calculates the fields in a record.

Figure 4-218 Formula widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-219 Setting the field name (Chinese and English)



Calculation Methods

Calculated By: Choose a calculation method:

- Sum: Adds all data to get the total.
- Average: Calculates the average value of the data.
- Minimum: Finds the smallest value in the data.
- Maximum: Finds the largest value in the data.
- Product: Multiplies all data to get the result.

- Custom: Customize a formula using **plus sign (+)**, **minus sign (-)**, **asterisk (*)**, **slash (/)**, and **parentheses (())**. Suitable for personalized or complex service scenarios.

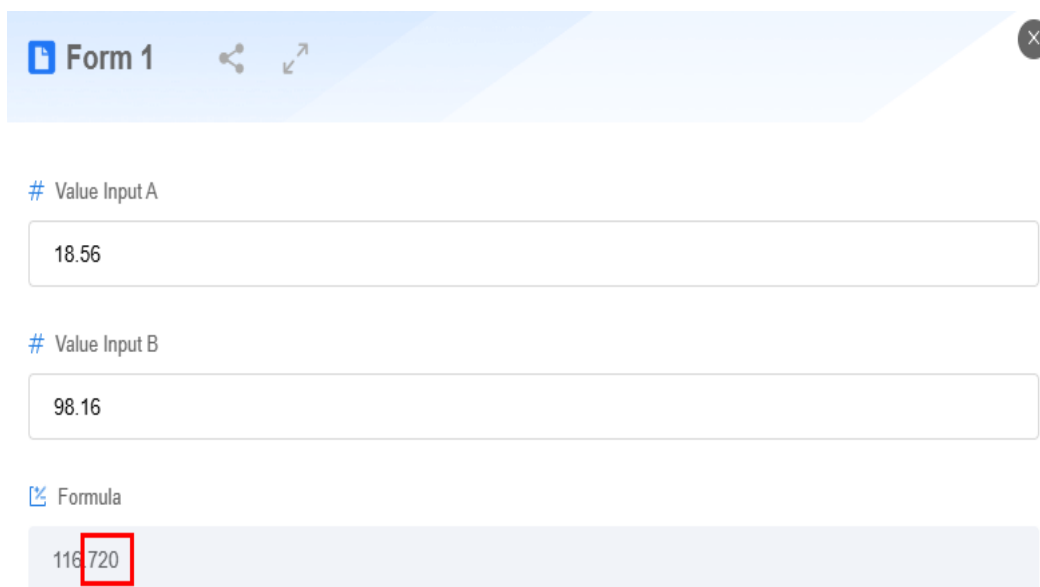
Figure 4-220 Calculating the sum of A and B

Figure 4-221 Result

Decimal Places

Set how many decimal places to keep. It starts at **2** by default. If you choose **3** decimal places, it will keep just 3. On the form filling page, the calculation result shows three decimal places. If there are fewer than three decimal places, **0** is added.

Figure 4-222 Three decimal places



Form 1

Value Input A

18.56

Value Input B

98.16

Formula

116.720

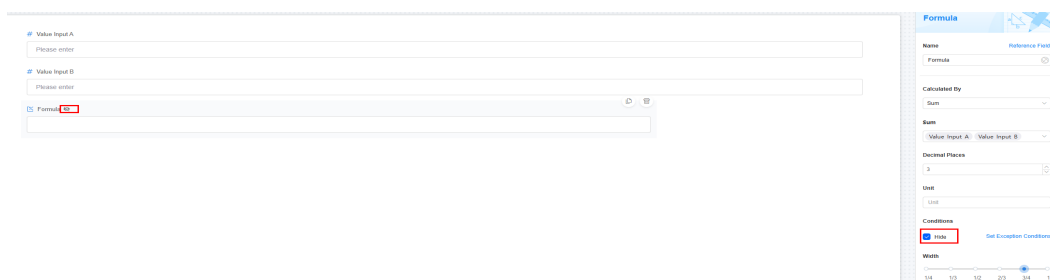
Unit

Set the unit of the calculation result.

Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-223 Hiding a field



Form 1

Value Input A

Please enter

Value Input B

Please enter

Formula

116.720

Formula

Name: Formula

Calculated By: Sum

Sum

Value Input A + Value Input B

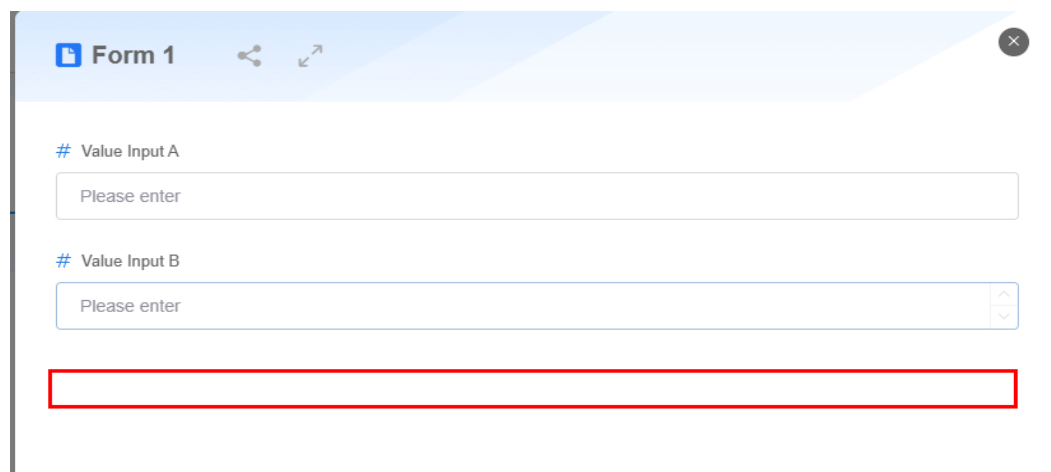
Decimal Places: 3

Unit: Unit

Conditions: ☒ Hide

Width: 100%

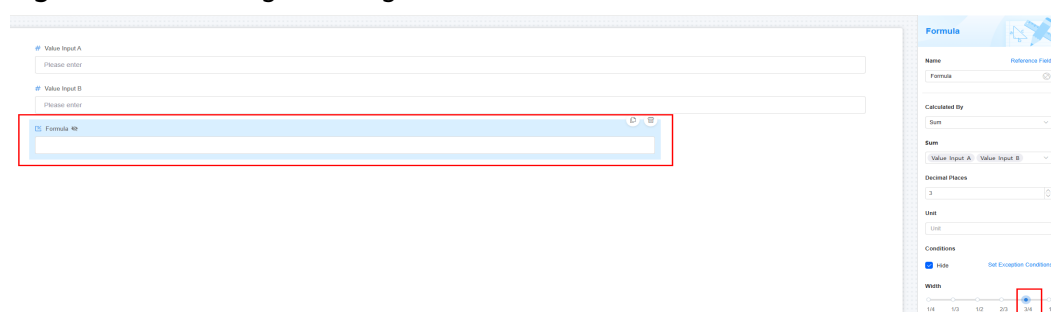
Figure 4-224 Effect



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-225 Setting the widget width

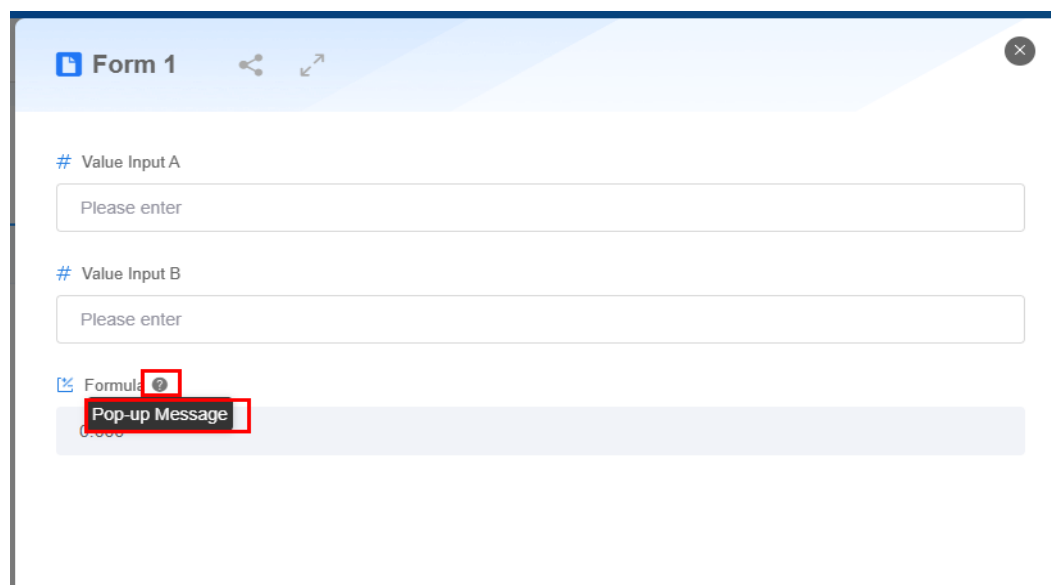


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

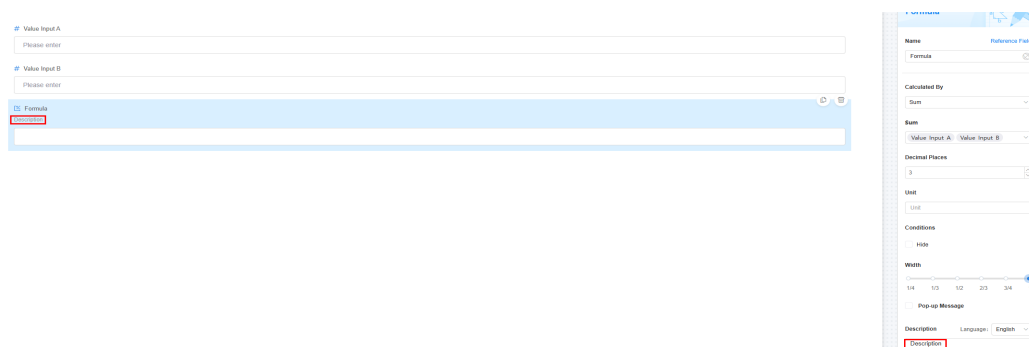
Figure 4-226 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-227 Effect



4.6.18 Setting the Properties of the Child Table Widget

This widget nests other tables within the current table as child tables. For example, if an order has multiple order details, the order details table is a child table of the order.

Figure 4-228 Child table widget

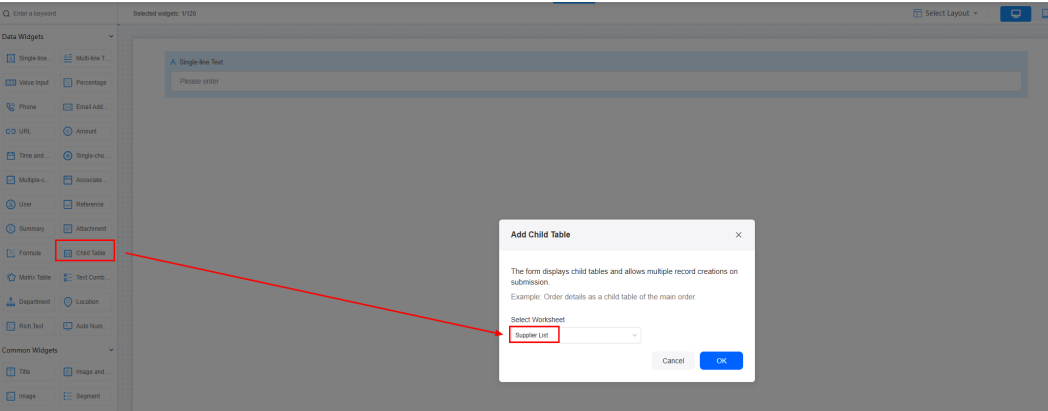
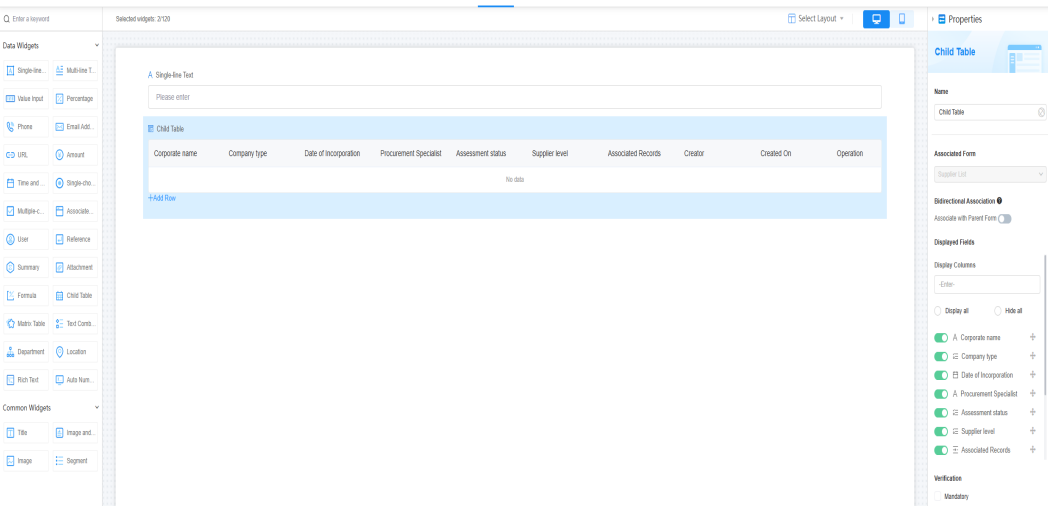


Figure 4-229 Setting the properties



Name


Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-230 Setting the field name (Chinese and English)



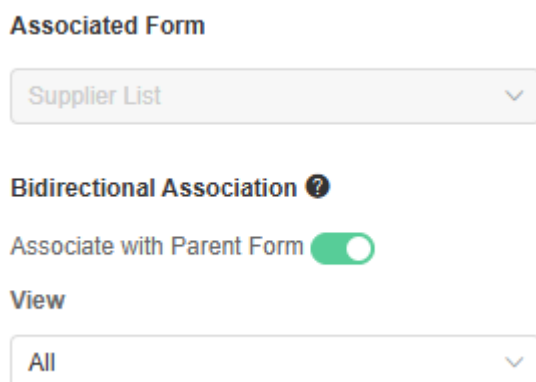
Associated Form

Associated child table, that is, a subordinate table that has a data association with the main (parent) table. For example, if an order has multiple order details, the order details table is the child table. When you add or delete data in the main table, the related data in the child table is automatically added or deleted accordingly.

Bidirectional Association

If this function is enabled, you can select parent table data in the child table to update data at the same time.

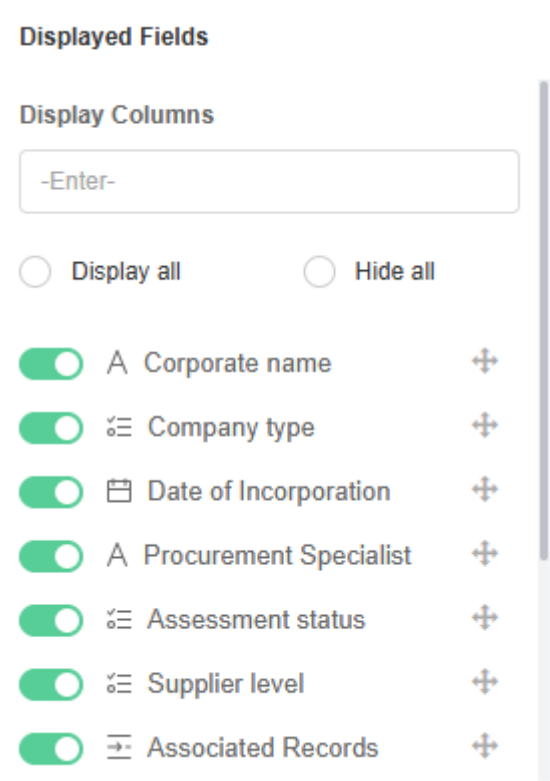
Figure 4-231 Bidirectional association



Displayed Fields

Set the fields to be displayed in the child table. If there are many fields, you can search for them in the search box. You can also show or hide all fields with one click.

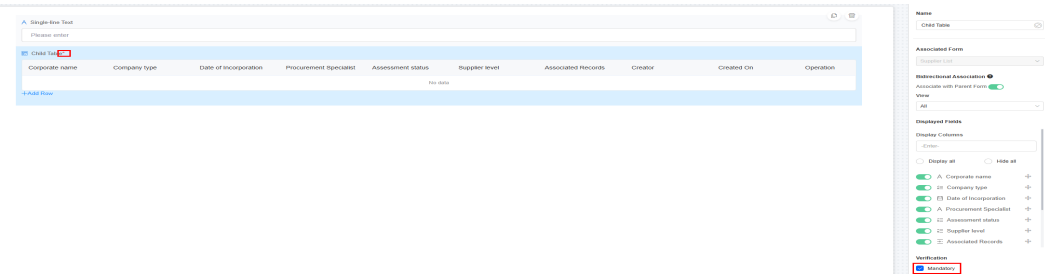
Figure 4-232 Setting fields to be displayed



Verification

Mandatory: If checked, the field is required and shows a * next to it.

Figure 4-233 Mandatory enabled



Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

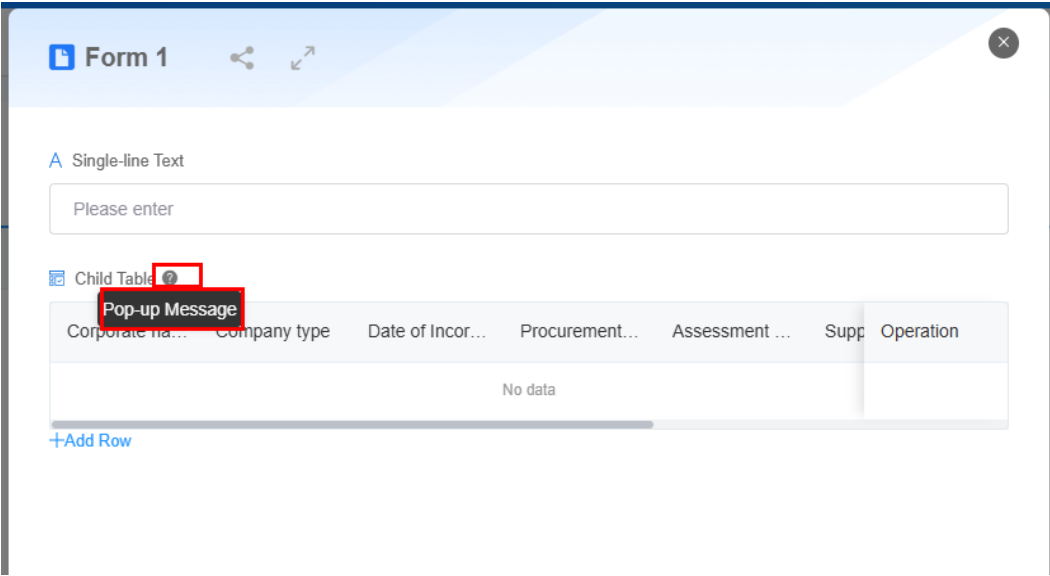
- **Read-only:** If checked, the child table is read-only.
- **Disable:** If checked, the content of the child table can still be displayed but cannot be configured.
- **Hide:** If checked, the child table content is hidden on the page.

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

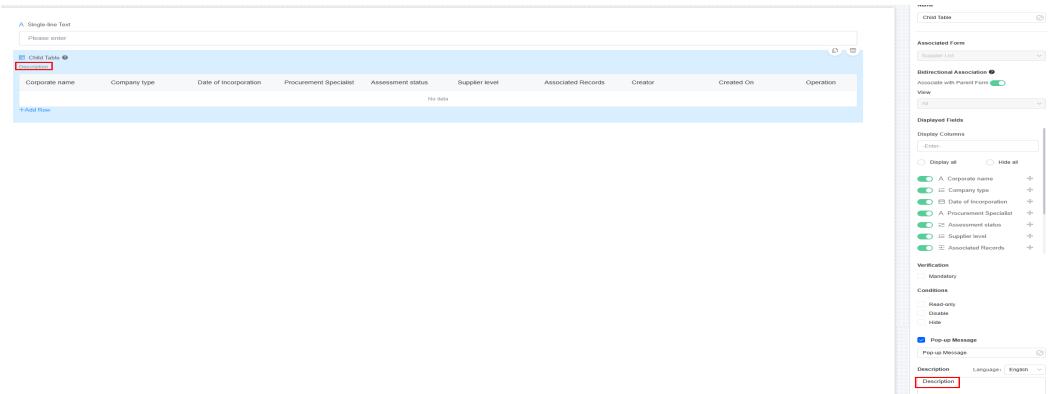
Figure 4-234 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

Figure 4-235 Effect



4.6.19 Setting the Properties of the Matrix Table Widget

The widget is used to visually assess the degree of preference for something. As shown in [Figure 4-237](#), a matrix table is used to score the vehicle.

Figure 4-236 Matrix table widget

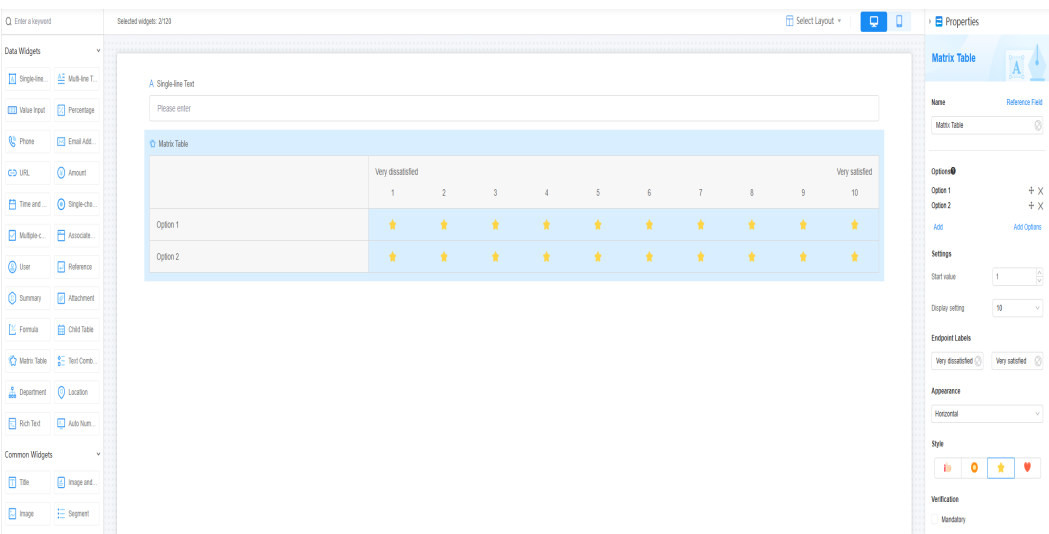
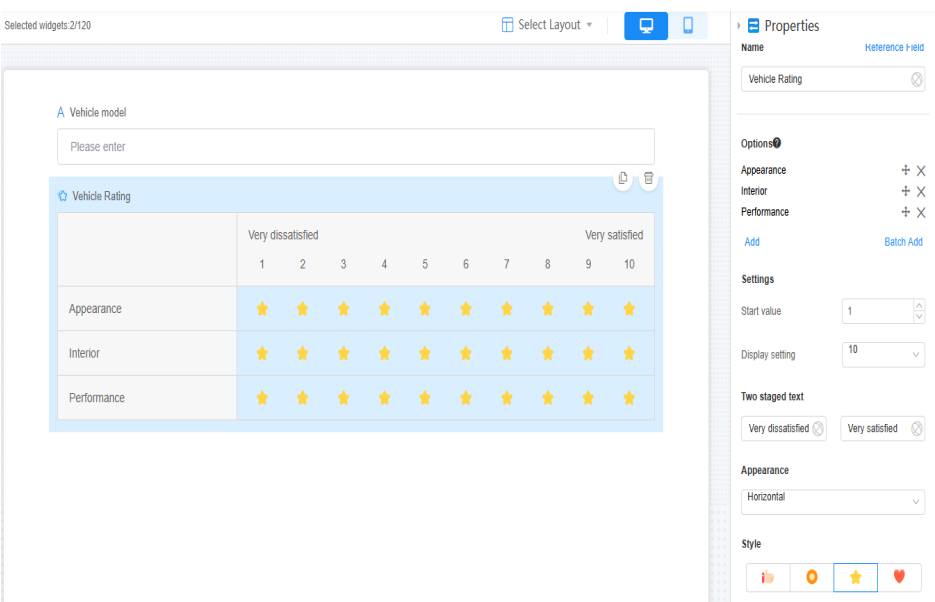


Figure 4-237 Configuration example



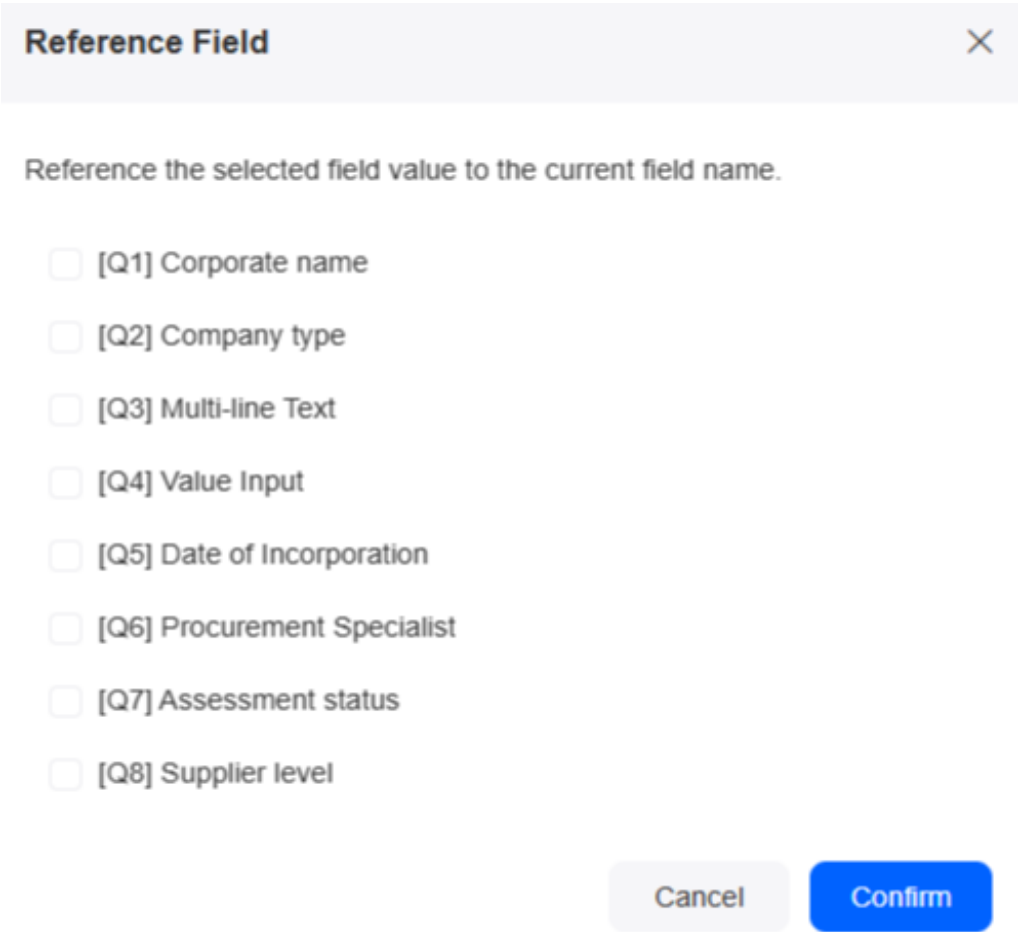
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-238 Setting the field name (Chinese and English)



Figure 4-239 Field reference



Options

Set evaluation options for an object. Up to 20 options can be added.


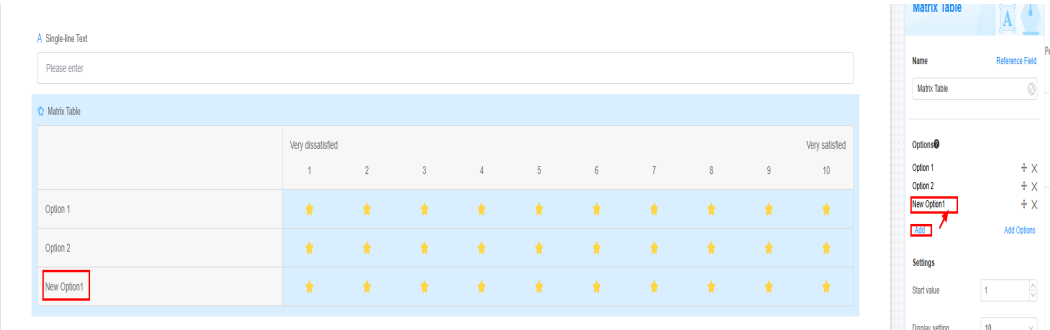
Click **Add** to add an option to the matrix table. Click the option name (like "Option 1") to rename it. Drag  to move an option to the top.

Figure 4-240 Adding an option



Click **Add Options** to add multiple options. **Each row is an option. An option name can be up to 85 characters long.**

Figure 4-241 Adding options in batches

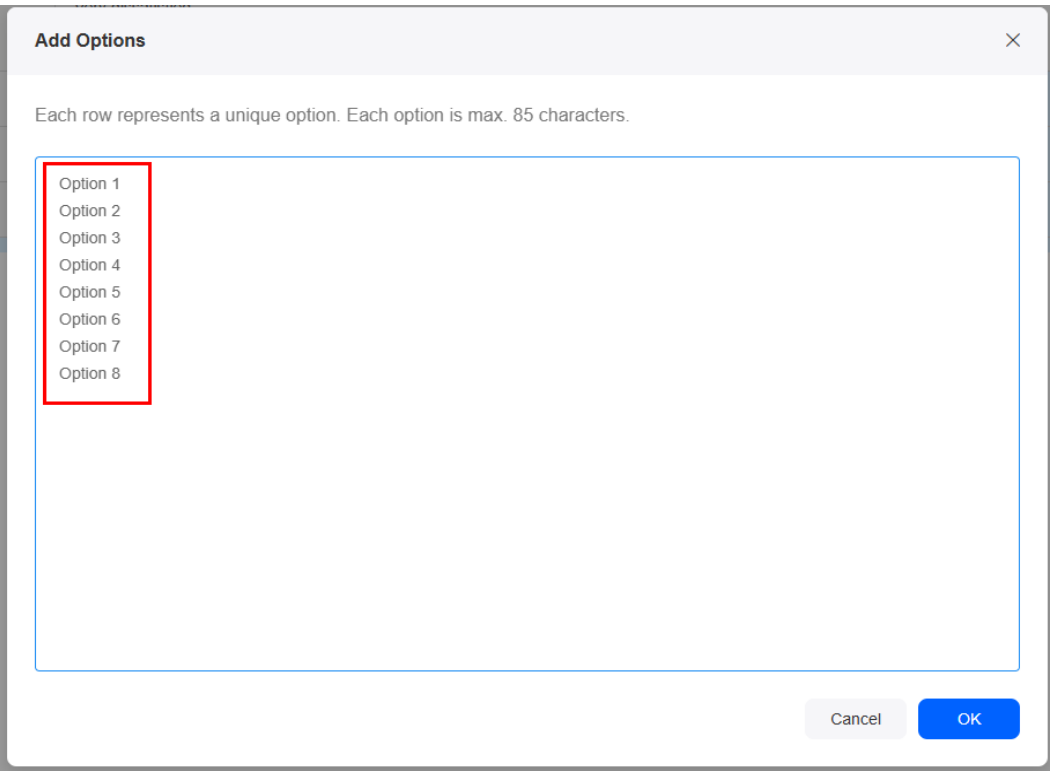
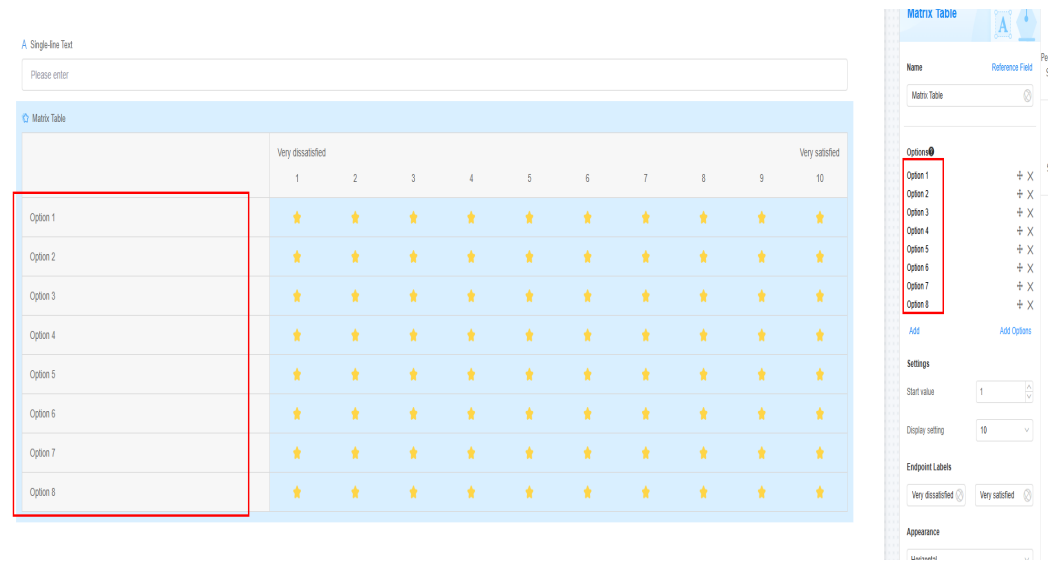


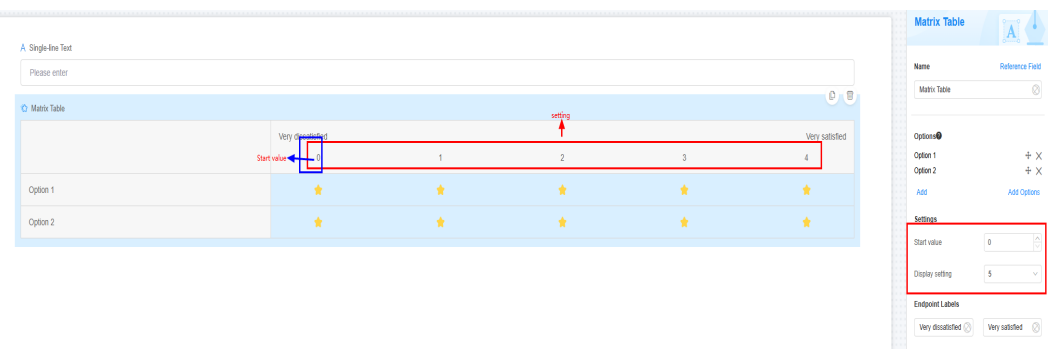
Figure 4-242 Effect



Settings

Set the start value and scale level of the evaluation. The start value ranges from [0, 10], and the scale level ranges from [2, 10].

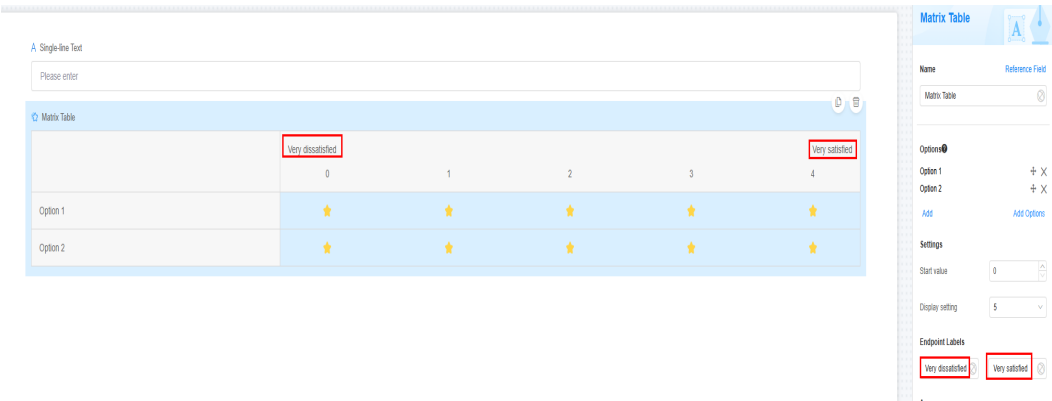
Figure 4-243 Setting the scale



Endpoint Labels

The display text for the two ends of the scale, such as "Very satisfied" and "Very dissatisfied".

Figure 4-244 Setting the endpoint labels



Appearance

Set the scale appearance to horizontal or vertical. Default is horizontal.

Figure 4-245 Horizontal display

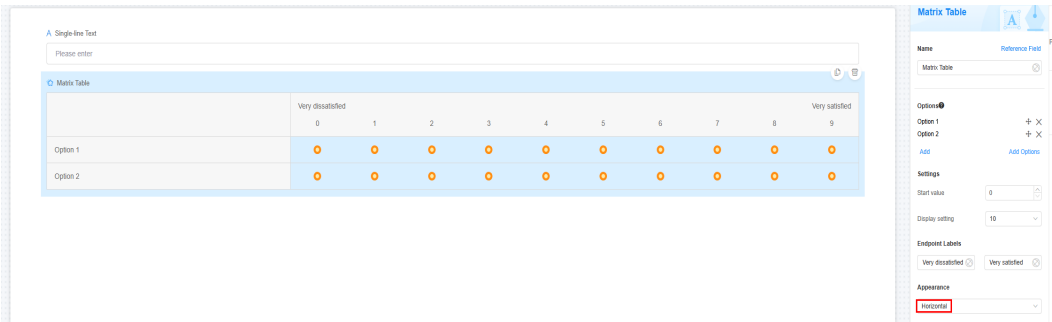
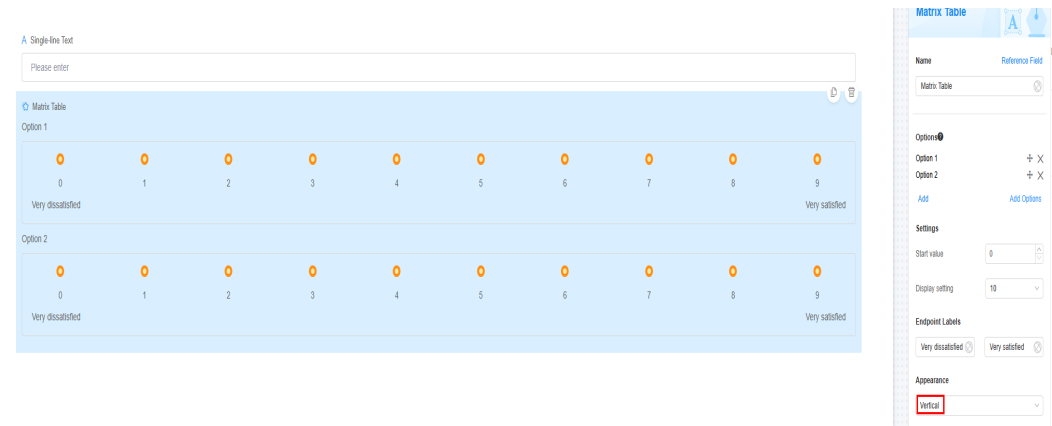


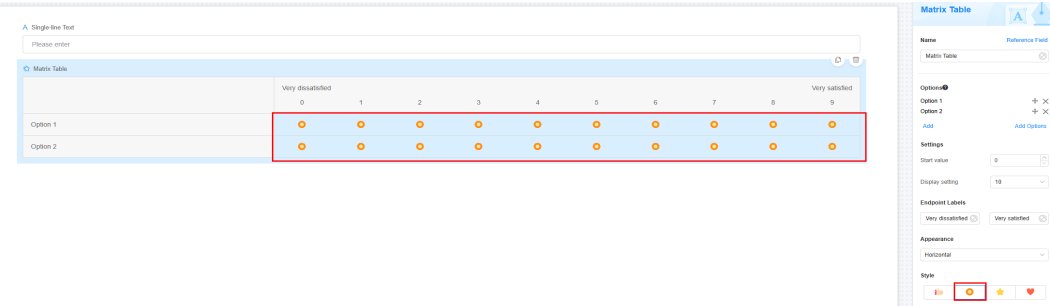
Figure 4-246 Vertical display



Style

Choose one of the four icon styles to visually display the evaluation result.

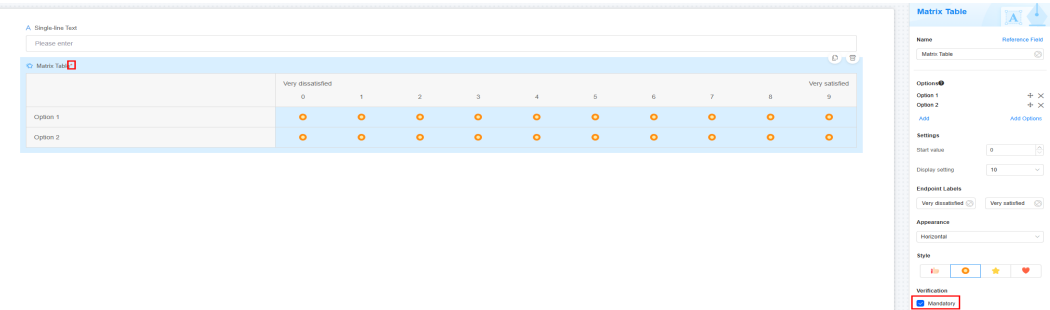
Figure 4-247 Legend style



Verification

Mandatory: If checked, the field is required and shows a * next to it.

Figure 4-248 Mandatory enabled



Conditions

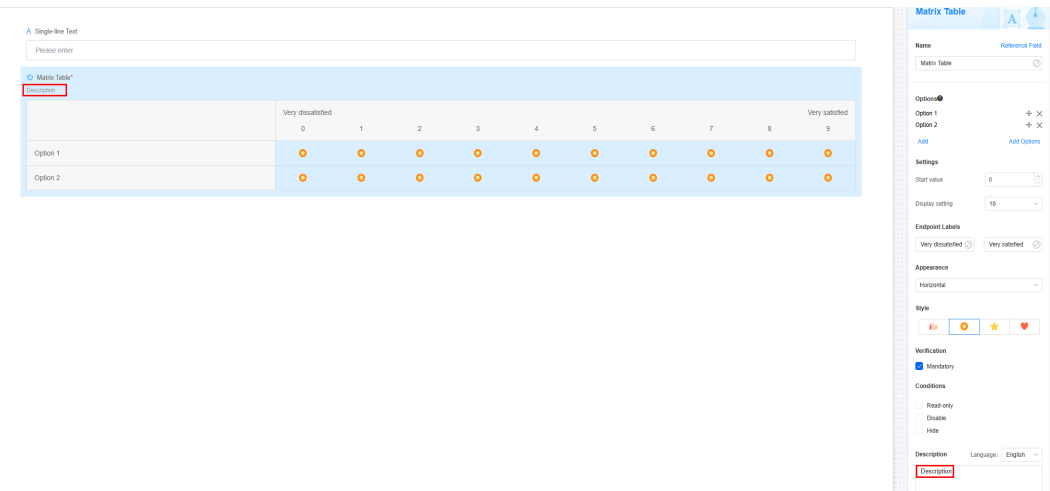
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only:** If checked, the field is read-only.
- **Disable:** If checked, the field shows but cannot be edited.
- **Hide:** If checked, the field is hidden on the page.

Description

Set the widget description. Include its functions, use cases, and tips. This helps users and makes the form clearer.

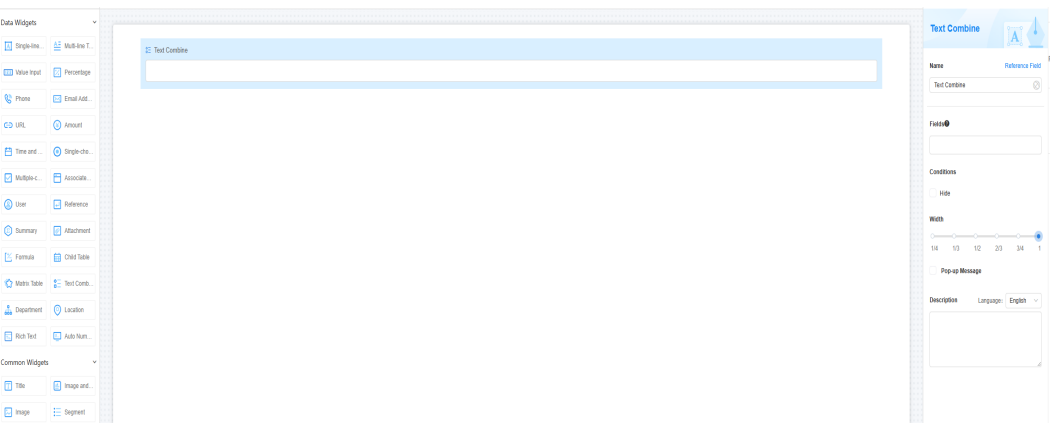
Figure 4-249 Effect



4.6.20 Setting the Properties of the Text Combination Widget

This widget combines fields in the current form in a certain format.

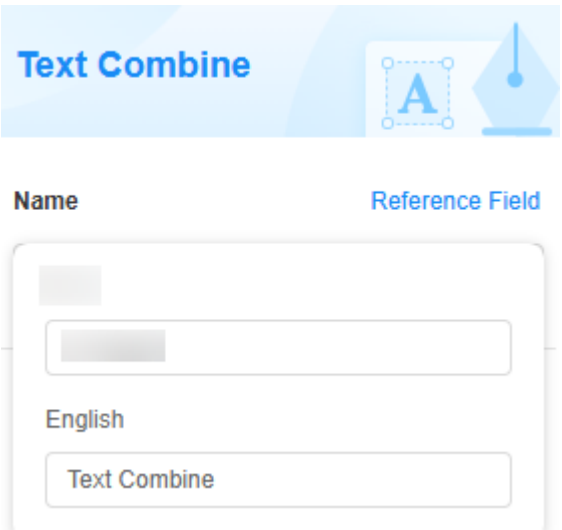
Figure 4-250 Text combination widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

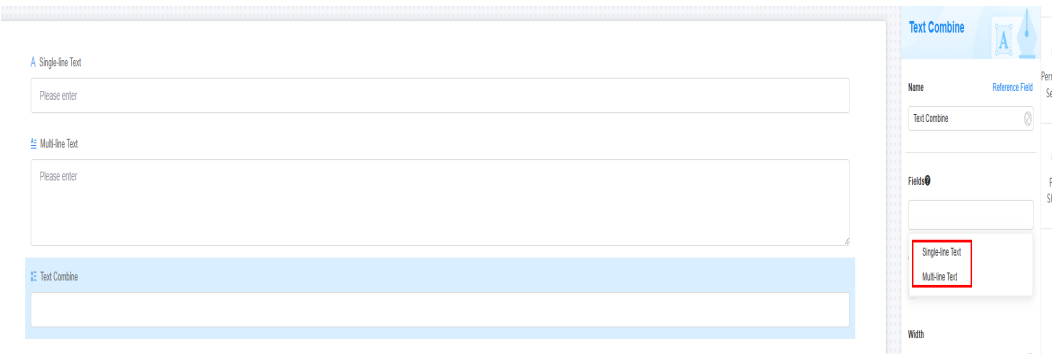
Figure 4-251 Setting the field name (Chinese and English)



Fields

Select a field to combine. The total number of fields and separators must not exceed 10.

Figure 4-252 Fields



Conditions

In some cases, you may need to collect fields that users do not need to see or enter manually. These fields can be automatically generated based on field associations and automated tasks. To hide them, check the **Hide** option.

Figure 4-253 Hiding a field

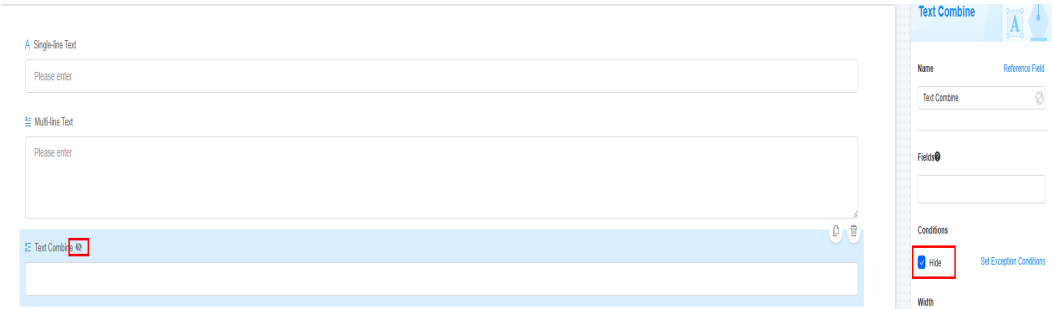
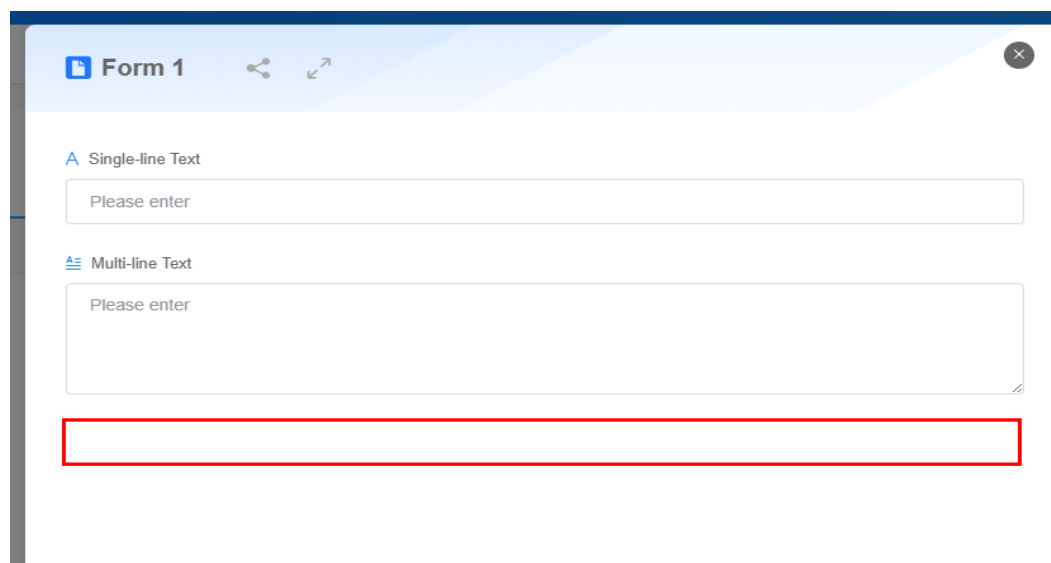


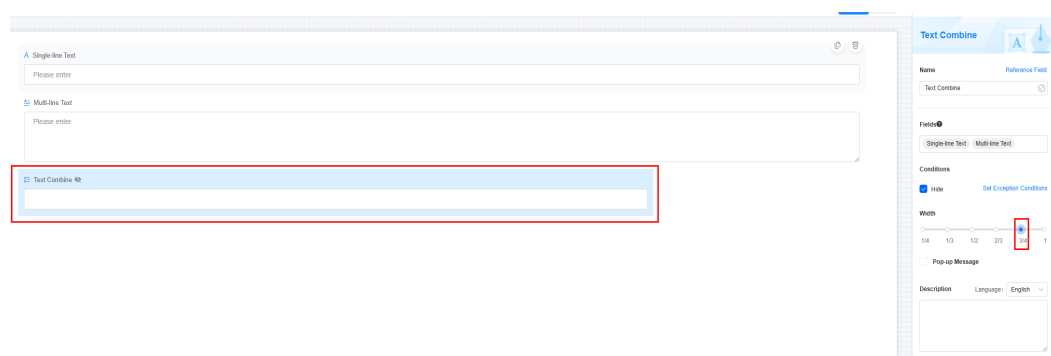
Figure 4-254 Effect



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-255 Setting the widget width

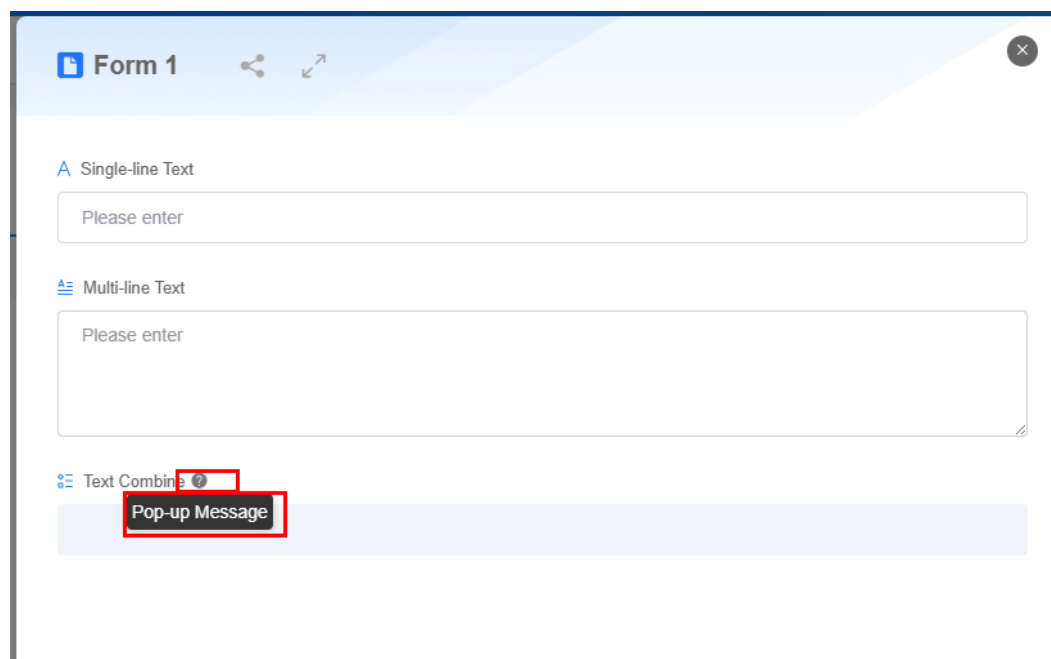


Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

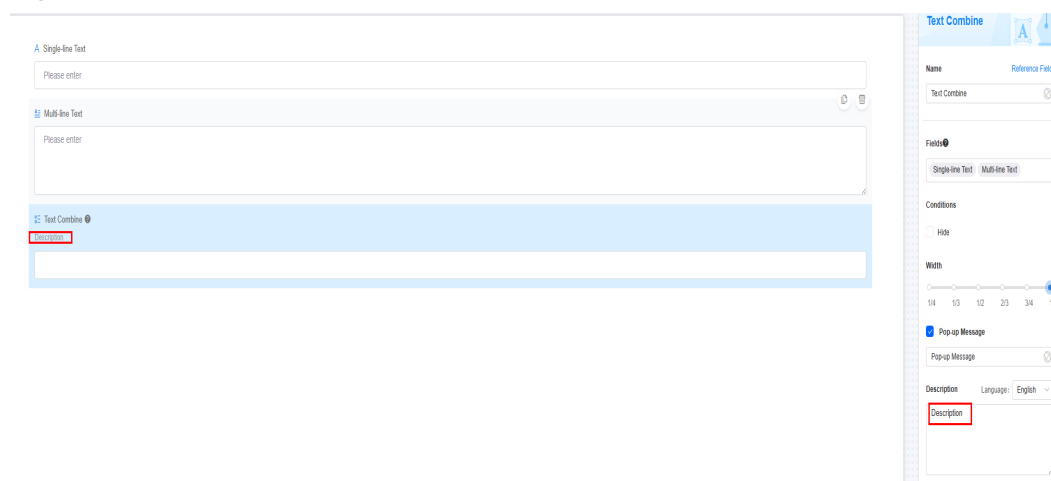
Figure 4-256 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

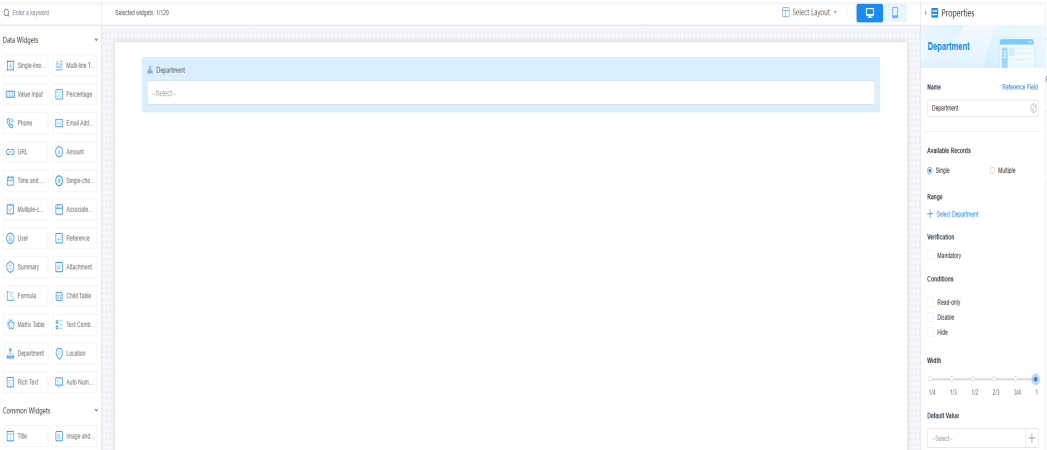
Figure 4-257 Effect



4.6.21 Setting the Properties of the Department Widget

This widget obtains organizations.

Figure 4-258 Department widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-259 Setting the field name (Chinese and English)

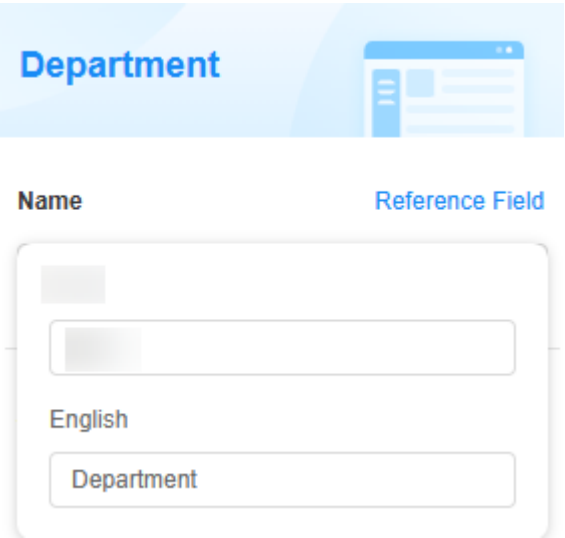
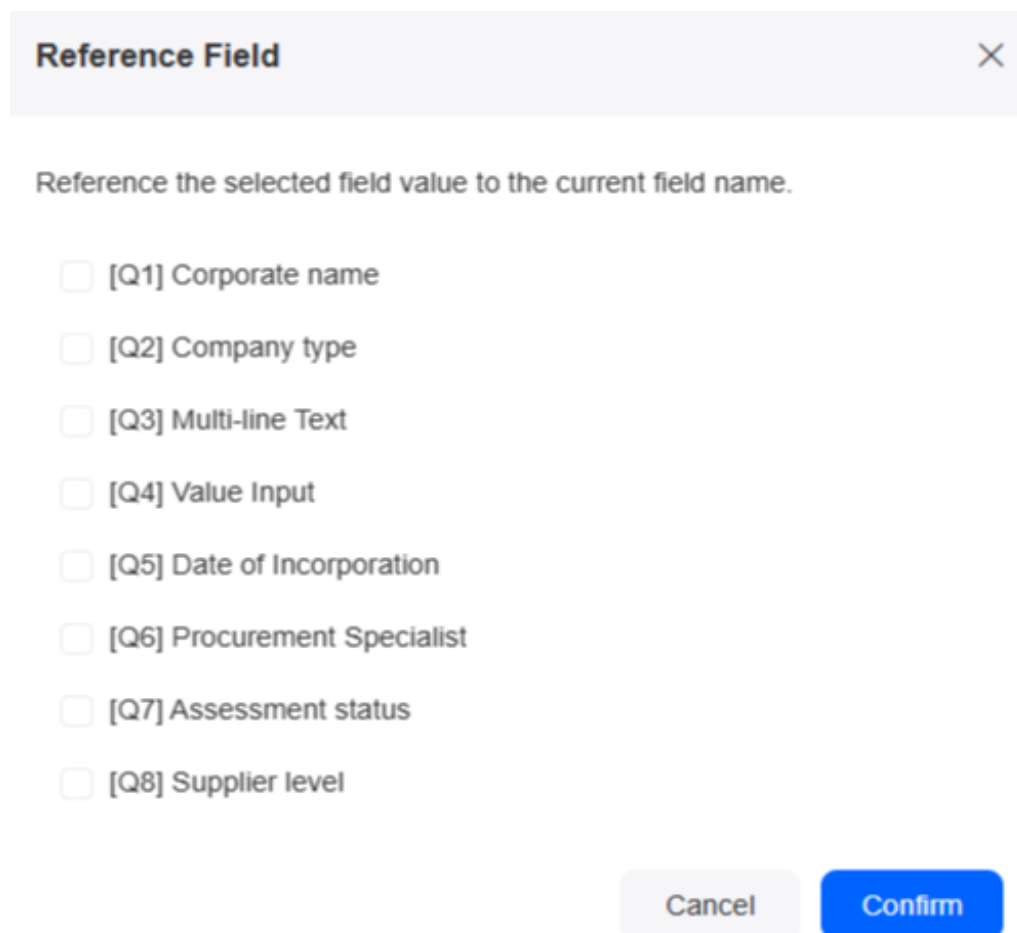


Figure 4-260 Field reference



Reference Field ×

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level

Cancel Confirm

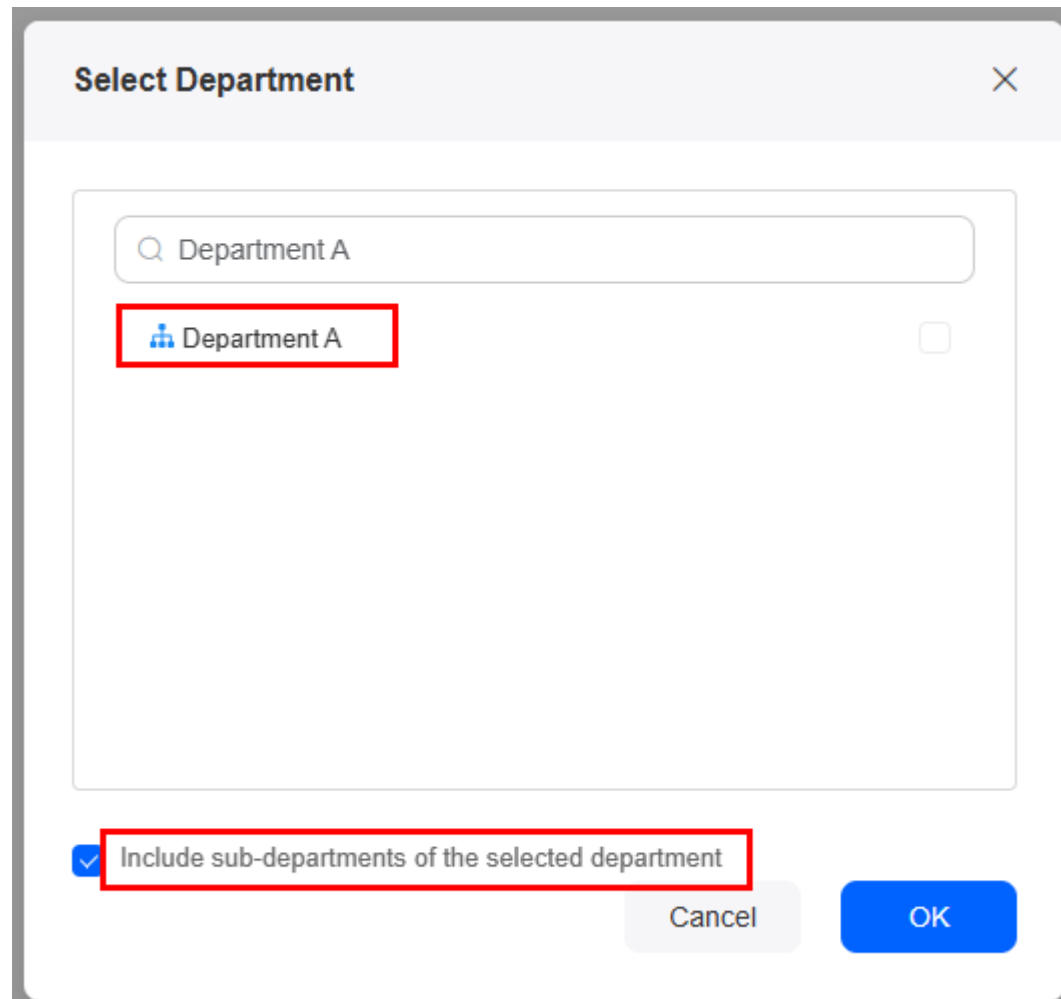
Available Records

The number of records that can be selected at a time. **Single** and **Multiple** are supported.

Range

Set the departments that can be selected. To include sub-departments of the selected department, check **Include sub-departments of the selected departments**. Departments must be created in the service configuration center beforehand. For details, see [Configuring Application Role Permissions](#).

Figure 4-261 Selecting a department



Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Quantity limit:** If **Available Records** is set to **Multiple**, you can specify the minimum and maximum number of departments that can be selected.

Figure 4-262 Limiting the number of selected items

Available Records

☐ Single ☒ Multiple

Range

+ Select Department

Verification

☐ Mandatory

☒ Quantity limit 1 ~ 10

Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only**: If checked, the field is read-only.
- **Disable**: If checked, the field shows but cannot be edited.
- **Hide**: If checked, the field is hidden on the page.

Width

The width is the ratio of the widget's width to the page width. Set it to control each widget's layout and display, improving the page's appearance and usability.

Figure 4-263 Setting the widget width

Department

Name Reference Field

Department

Available Records

☐ Single ☒ Multiple

Range

+ Select Department

Verification

☐ Mandatory

☒ Quantity limit 1 ~ 10

Conditions

☐ Read-only

☐ Disable

☐ Hide

Width

1/4 1/3 1/2 2/3 3/4 1

- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "--Select--" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-264 Setting the default value of a widget



- Department of the current user: Select the department to which the current user belongs as the default value.
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Figure 4-265 Setting the default value

Set Default Values

Associated Object

Supplier List - All

Query Data

SetFilter Criteria

After a record is found

Use the latest record as the default value and fill it in the current field.

The current field will be set to

Corporate name

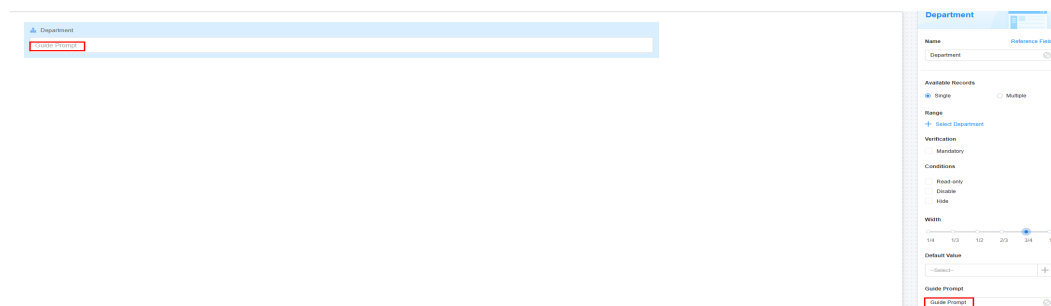
Cancel

Confirm

Guide Prompt

If a user does not set this parameter, the text displayed on the GUI guides the user to perform correct operations.

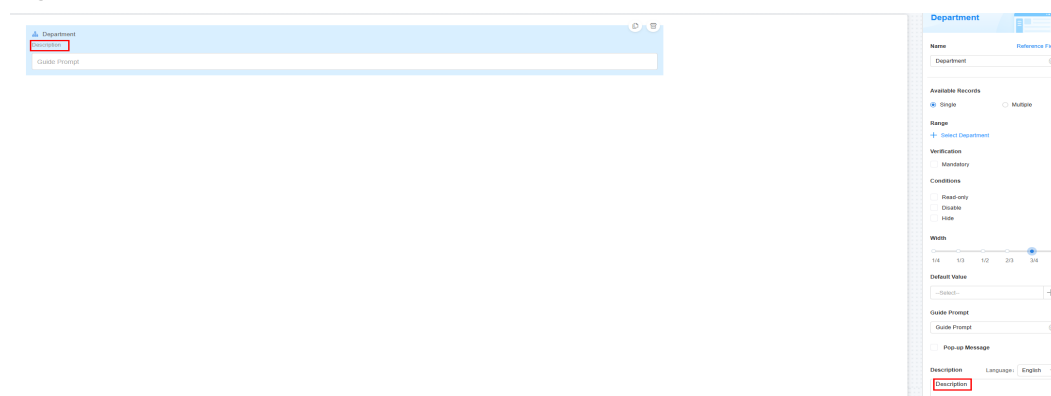
Figure 4-266 Setting the guide prompt



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

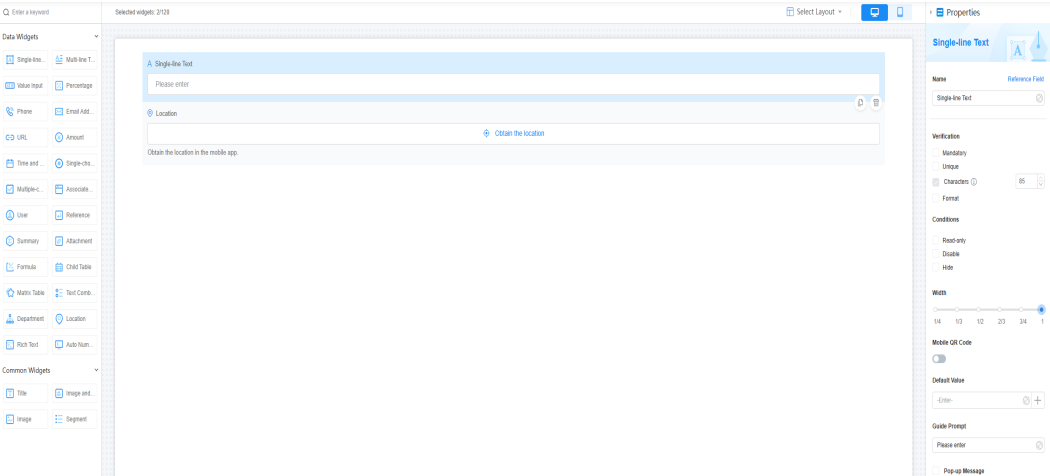
Figure 4-267 Effect



4.6.22 Setting the Properties of the Location Widget

This widget obtains geographical location information. **It works only on mobile devices.**

Figure 4-268 Location widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-269 Setting the field name (Chinese and English)



Figure 4-270 Field reference

Reference Field

×

Reference the selected field value to the current field name.

☐

[Q1] Corporate name

☐

[Q2] Company type

☐

[Q3] Multi-line Text

☐

[Q4] Value Input

☐

[Q5] Date of Incorporation

☐

[Q6] Procurement Specialist

☐

[Q7] Assessment status

☐

[Q8] Supplier level

Cancel

Confirm

Verification

Limit the field's length and format to keep data accurate and valid.

- **Mandatory:** If checked, the field is required and shows a * next to it.
- **Range:** Set the location range. You can set the longitude and latitude coordinates of a fixed location or set the location radius with a fixed location as the center.
 - **Coordinates > Longitude:** Set the east-west position of a location. Range: -180 to 180. West longitude: -180 to 0. East longitude: 0 to 180.
 - **Coordinates > Latitude:** Set the north-south position of a location. Range: -90 to 90. South latitude: -90 to 0. North latitude: 0 to 90.
 - **Location Range > Radius:** Set the radius of the circle centered at a fixed location. Example: Center at 45°E, 45°N; Radius: 50 meters.

Figure 4-271 Setting the location range

The screenshot shows the configuration for a 'Location' widget. At the top, there's a header 'Location' with a blue icon. Below it, a 'Name' field is set to 'Location' and a 'Reference Field' icon is visible. The 'Verification' section has two options: 'Mandatory' (unchecked) and 'Range' (checked). Below this, the 'Coordinates' section is highlighted with a red box. It contains three fields: 'Longitude' with the value '45', 'Latitude' with the value '45', and 'Location Range' which includes a 'Radius (Meter)' field set to '50' with up/down arrows.

Conditions

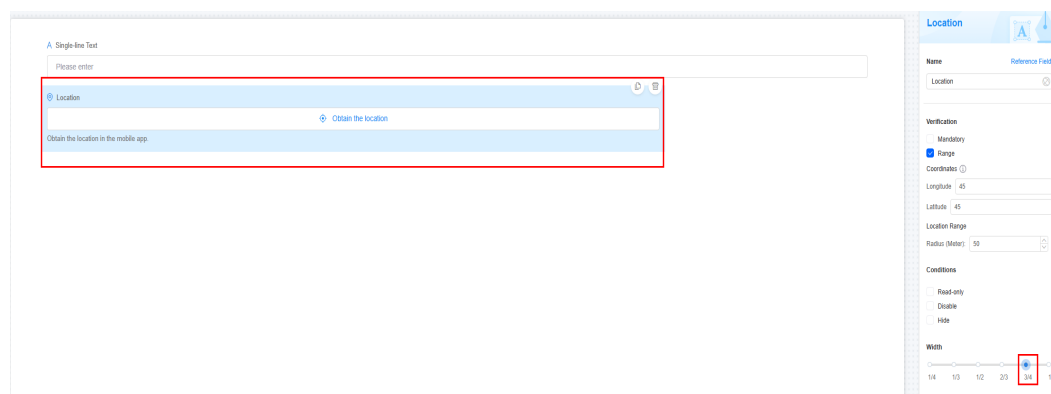
Set field properties like **Read-only**, **Disable**, and **Hide**.

- **Read-only**: If checked, the field is read-only.
- **Disable**: If checked, the field shows but cannot be edited.
- **Hide**: If checked, the field is hidden on the page.

Width

The width is the ratio of the widget's width to the page width. Set it to control each widget's layout and display, improving the page's appearance and usability.

Figure 4-272 Setting the widget width

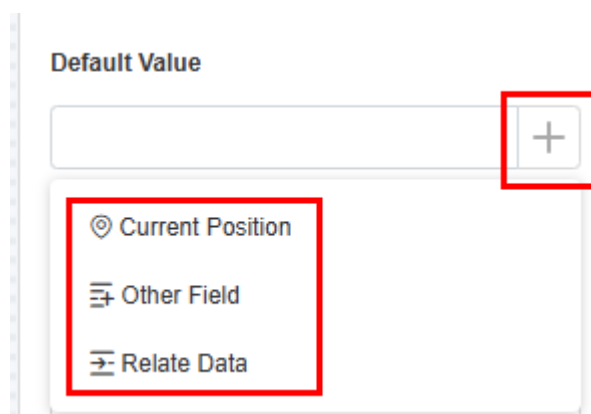


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Default Value

Set a default value for the widget (defaults to "Please enter" if not set). This reduces user input, speeds up processes, and prevents invalid entries.

Figure 4-273 Setting the default value of a widget



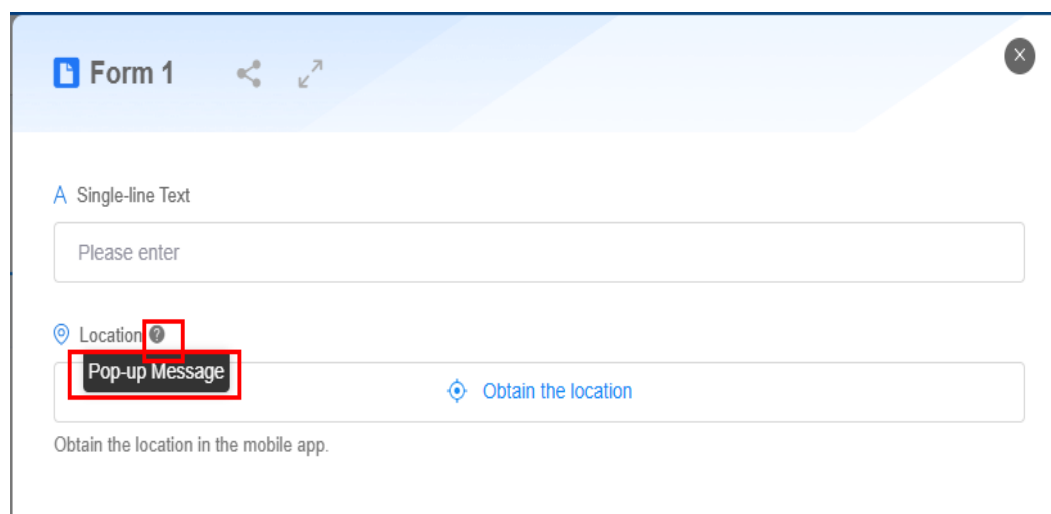
- Current position: Obtain the current location as the default value.
- Other field: Fields from other widgets.
- Relate data: Link to existing data. The latest record is used as the default.

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

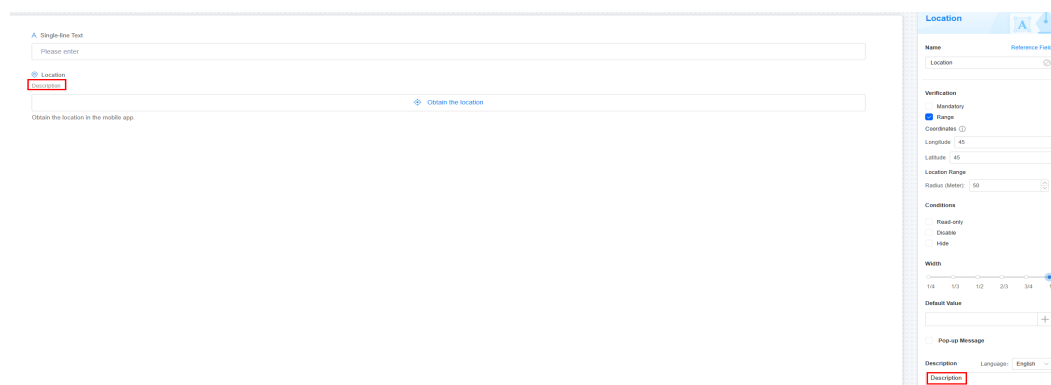
Figure 4-274 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

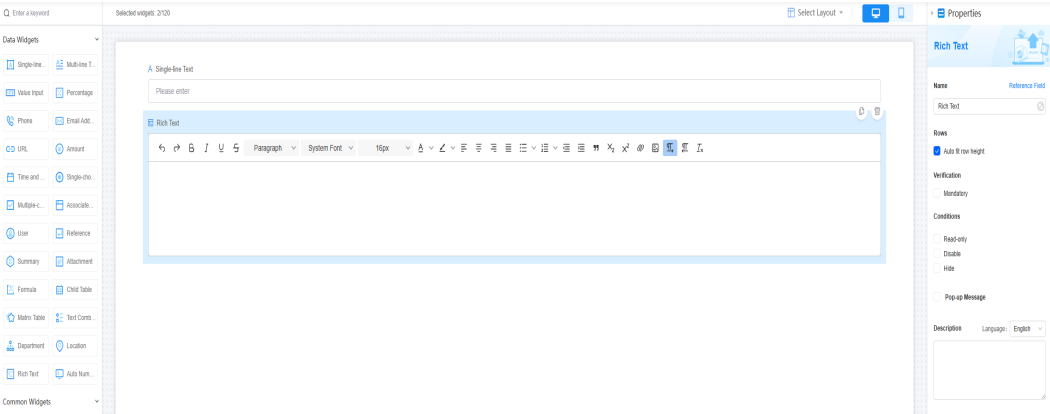
Figure 4-275 Effect



4.6.23 Setting the Properties of the Rich Text Widget

This widget is used to input text and supports text and images.

Figure 4-276 Rich text widget



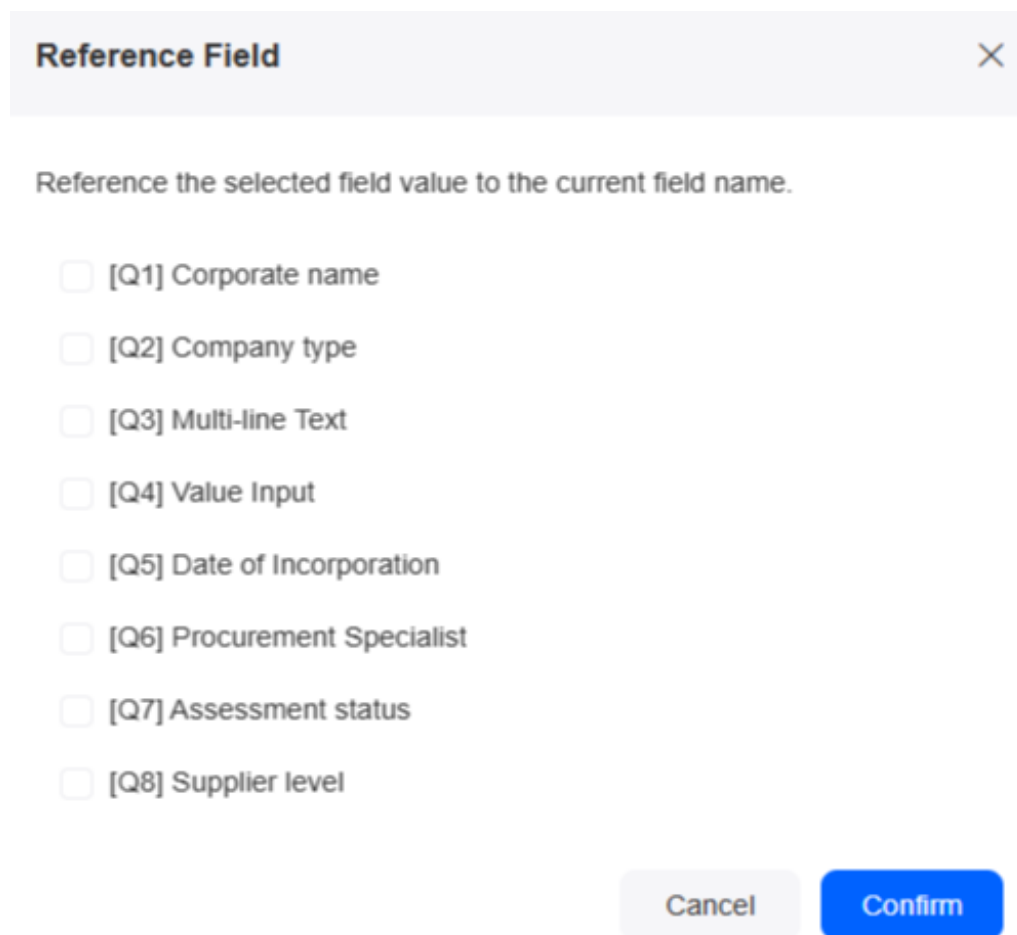
Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-277 Setting the field name (Chinese and English)



Figure 4-278 Field reference



The image shows a 'Reference Field' dialog box with a close button (X) in the top right corner. Below the title bar, there is a text instruction: 'Reference the selected field value to the current field name.' Underneath this instruction is a list of eight fields, each preceded by an unchecked checkbox. The fields are: [Q1] Corporate name, [Q2] Company type, [Q3] Multi-line Text, [Q4] Value Input, [Q5] Date of Incorporation, [Q6] Procurement Specialist, [Q7] Assessment status, and [Q8] Supplier level. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Confirm'.

Reference Field ×

Reference the selected field value to the current field name.

- ☐ [Q1] Corporate name
- ☐ [Q2] Company type
- ☐ [Q3] Multi-line Text
- ☐ [Q4] Value Input
- ☐ [Q5] Date of Incorporation
- ☐ [Q6] Procurement Specialist
- ☐ [Q7] Assessment status
- ☐ [Q8] Supplier level


Cancel Confirm

Rows

Set the default number of rows. The row height adjusts automatically based on the content. Default is **four rows**, meaning only four lines of text are shown. To view more than four lines, use the scroll bar.

Figure 4-279 Setting the number of rows


Rich Text



Name

Reference Field



Rich Text



Rows

Default rows

4

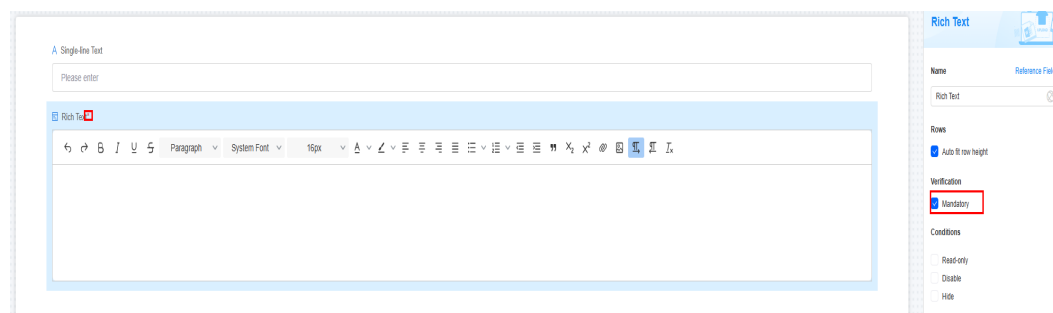
☐ Auto fit row height

Figure 4-280 Effect

Verification

Mandatory: If checked, the field is required and shows a * next to it.

Figure 4-281 Mandatory enabled



Conditions

Set field properties like **Read-only**, **Disable**, and **Hide**.

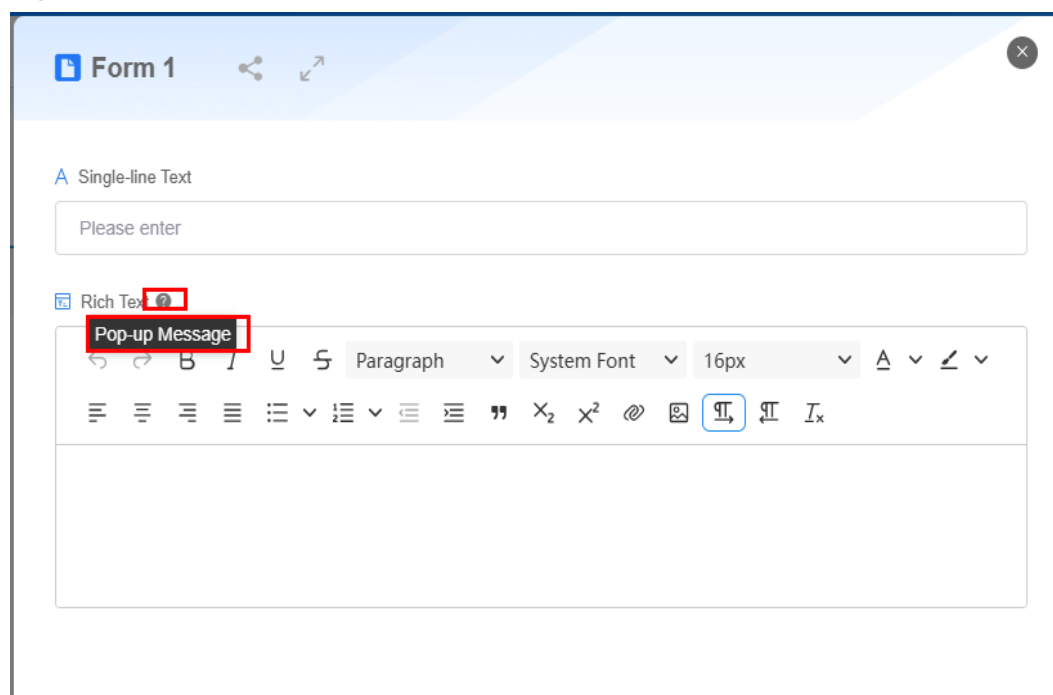
- **Read-only**: If checked, the field is read-only.
- **Disable**: If checked, the field shows but cannot be edited.
- **Hide**: If checked, the field is hidden on the page.

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

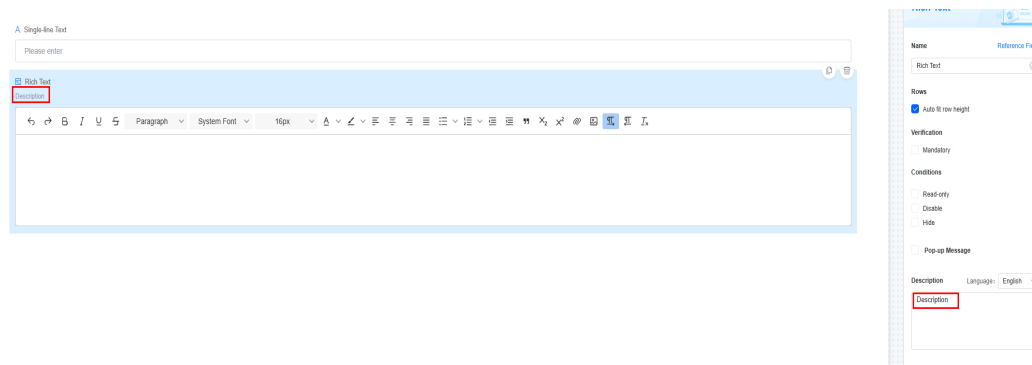
Figure 4-282 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

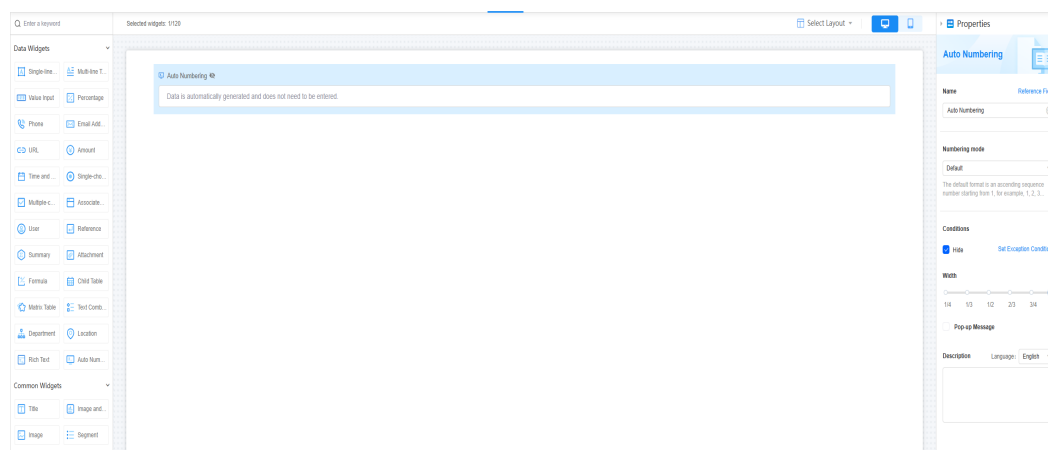
Figure 4-283 Effect



4.6.24 Setting the Properties of the Auto Numbering Widget

This widget automatically generates a number in a custom format for each record.

Figure 4-284 Auto numbering widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-285 Setting the field name (Chinese and English)

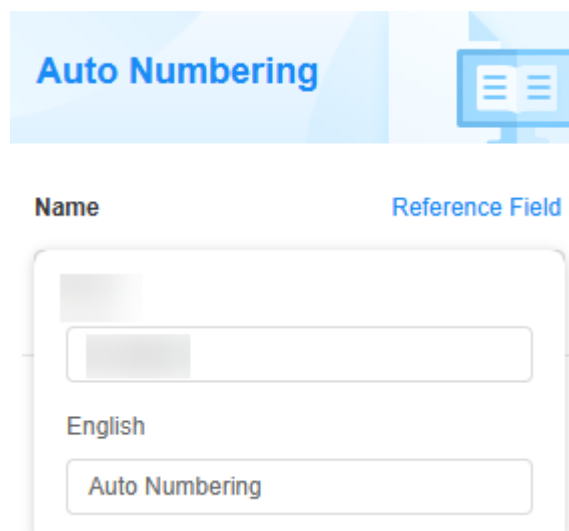
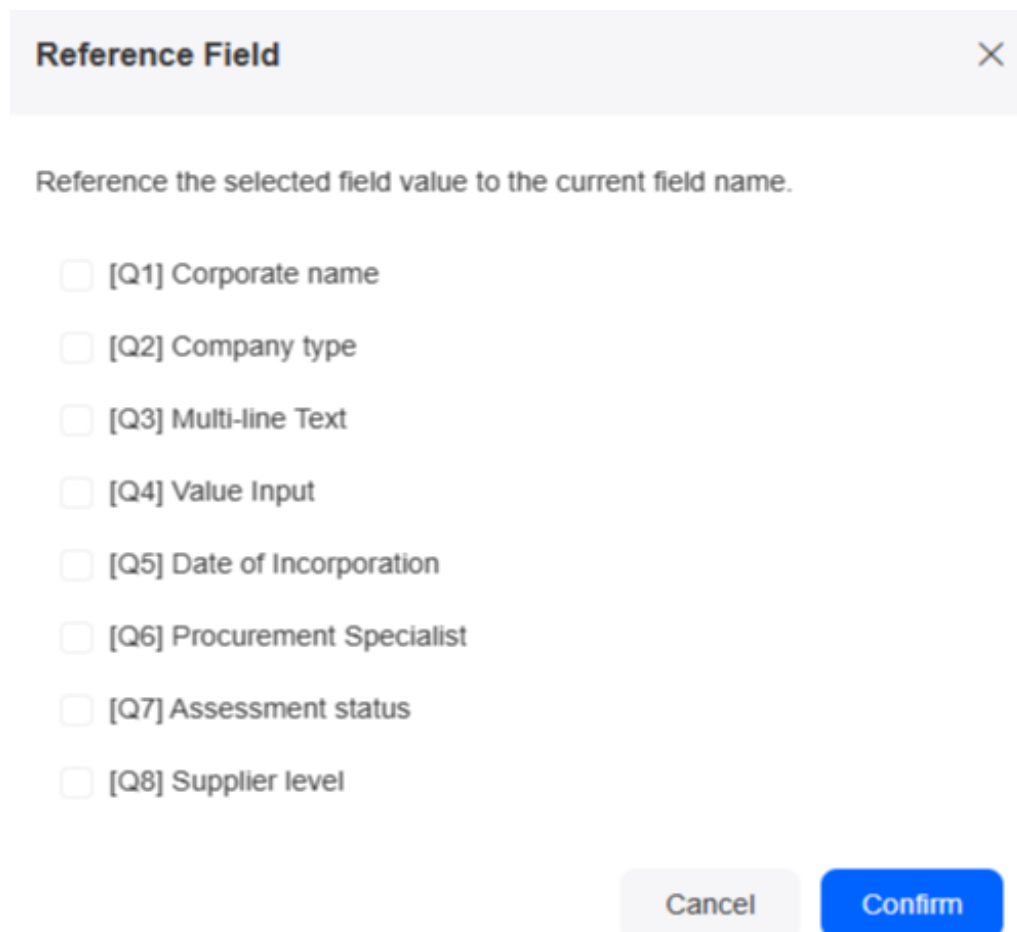


Figure 4-286 Field reference



Numbering Mode

Numbering mode. By default, it is an ascending sequence starting from 1 (e.g., 1, 2, 3). You can also customize the numbering mode. When the numbering mode is


set to **Customization**, the first numbering rule defaults to **Auto Counting**. Click  next to **Auto Counting** to modify the auto counting rule.

Figure 4-287 Modifying rules

Modifying a rule

* Type

Automatic Counting

Automatically generate an ascending count based on the number of digits and repetition period, for example: 0003

* Numbering mode

☒ Natural Number

☐ Specified Digit

* Start Value

1

* Reset Cycle

Do not reset

Cancel

Confirm

Table 4-12 Parameters for modifying rules

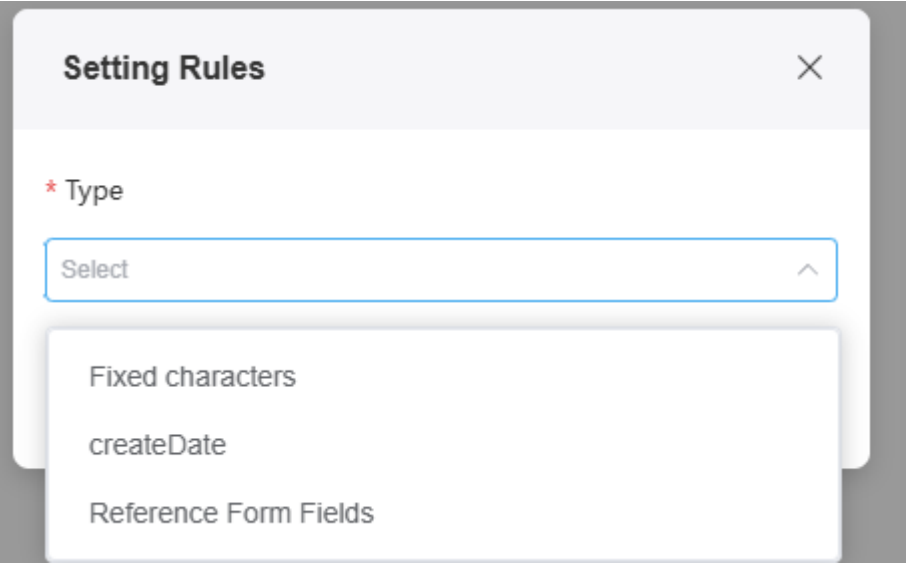
Parameter	Description
Type	Auto counting: Numbers are generated automatically, formatted by digit count and reset period. Example: 0003.
Numbering mode	Numbering mode of the auto counting rule. <ul style="list-style-type: none">Natural number: Numbers are numbered from 1 in ascending order.Specified digit: The number of digits in a number is specified, for example, 0001.

Parameter	Description
Start Value	Start value of the number.
Digit	<p>Total number of digits. The default value is 4, for example, 0001. Avoid setting the number of digits too few. If the count exceeds the digit limit, it will reset and may cause duplicate numbers. If you choose to continue incrementing past the limit, the numbering will keep increasing. Otherwise, it will restart from 1.</p> <p>This parameter needs to be set only when the numbering mode is set to Specified Digit.</p>
Reset Cycle	<p>Set the reset period for auto counting. A suitable reset period helps keep data statistics orderly and logical.</p> <ul style="list-style-type: none">• None: Numbering starts from the start value and keeps increasing.• Daily: Numbering resets to the start value at 00:00 every day.• Weekly: Numbering resets to the start value at 00:00 every Monday.• Monthly: Numbering resets to the start value at 00:00 on the first day of each month.• Yearly: Numbering resets to the start value at 00:00 on the first day of each year.

After setting the default auto counting rule, you can add custom numbering rules under **Setting Rules** based on these requirements:

- Rules are applied from left to right in the generated number.
- [Fixed characters][Creation time][Referenced form field] rules can be added a maximum of twice.
- If the auto-numbering field exceeds 256 characters, data submission will fail.

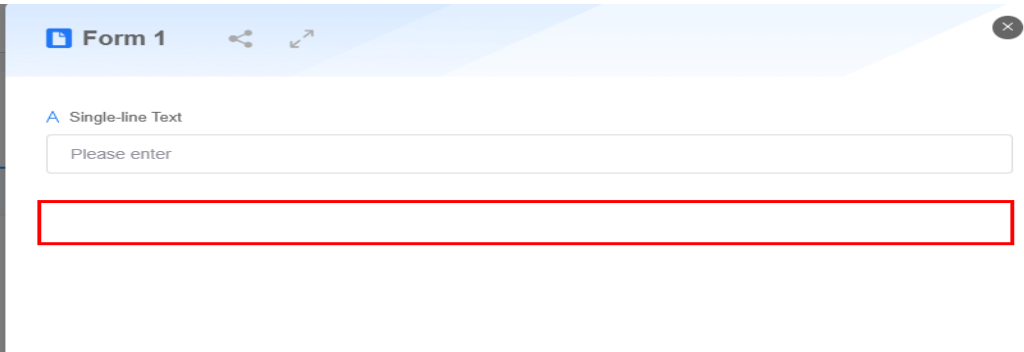
Figure 4-288 Customizing numbering rules



Conditions

Hide: Choose whether to hide the current field. By default, the auto-numbering field is hidden and not displayed on the page.

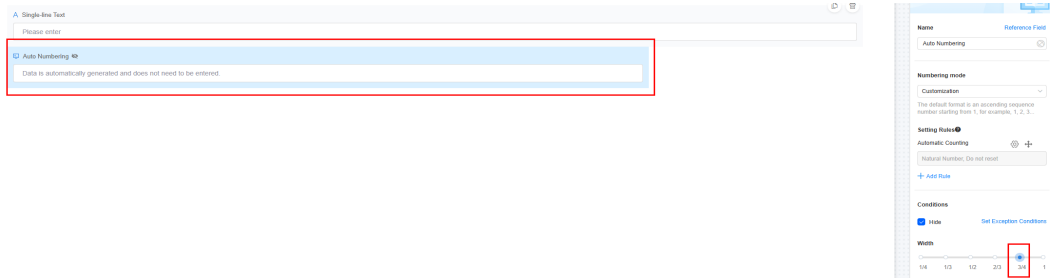
Figure 4-289 Effect



Width

The width is the ratio of the widget's width to the page width. Set it to control each widget's layout and display, improving the page's appearance and usability.

Figure 4-290 Setting the widget width



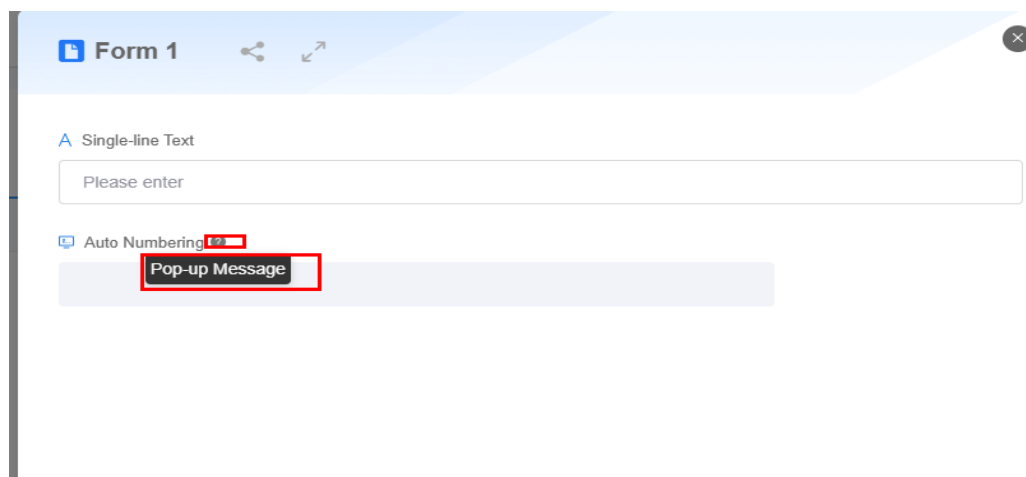
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Pop-up Message

If a field is unclear, add a **Pop-up Message** to explain it. This helps users and makes things easier.

After setting, a question mark icon appears next to the field. When filling in the form, click the question mark icon to see the message.

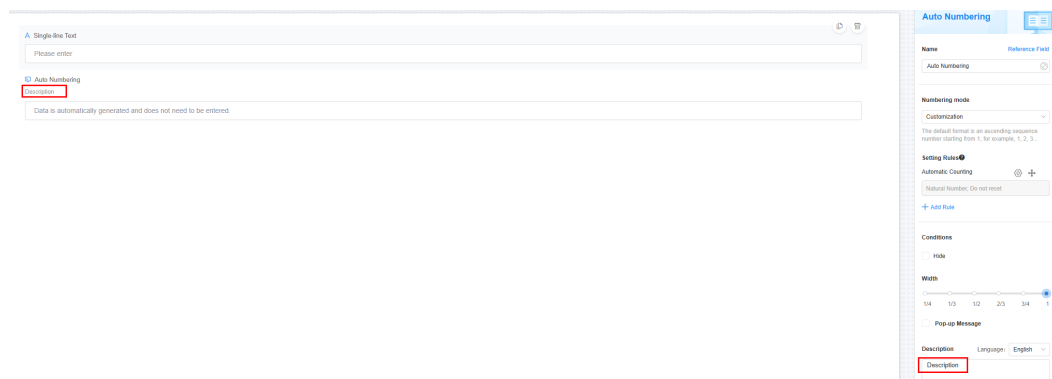
Figure 4-291 Effect



Description

Set the widget description. Include its functions, use cases, and tips. This helps users understand it better and makes the form clearer.

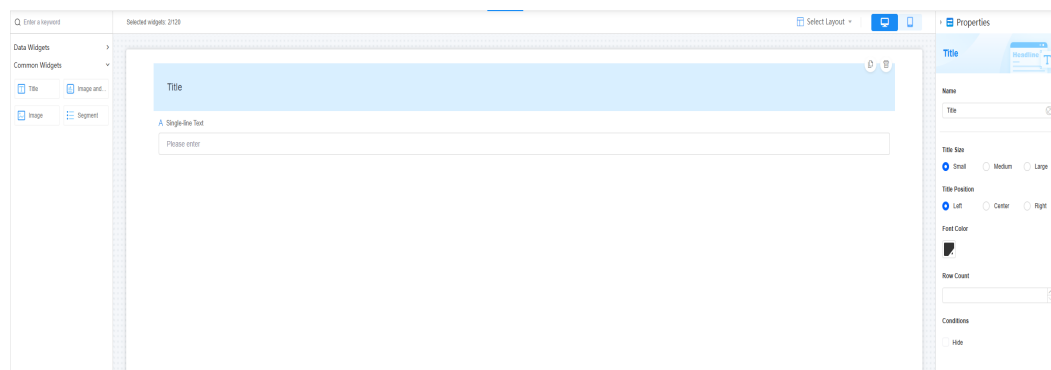
Figure 4-292 Effect



4.6.25 Setting the Properties of the Title Widget

This widget shows titles on pages. It is a common widget for enhancing appearance, not for user input.

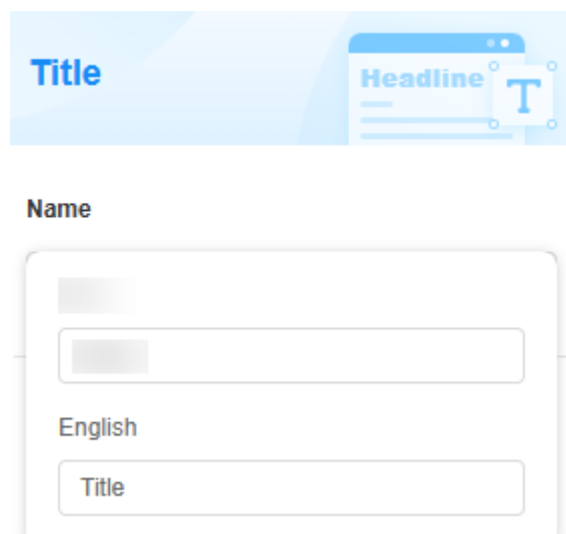
Figure 4-293 Title widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-294 Setting the field name (Chinese and English)



Title Size

Set the font size of the title. The options are **Small**, **Medium**, and **Large**. Default is **Small**.

Figure 4-295 Small

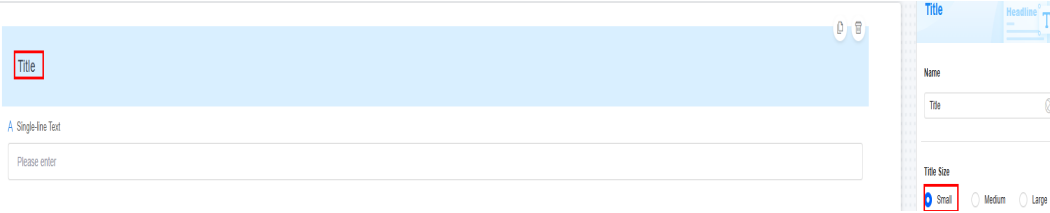


Figure 4-296 Medium

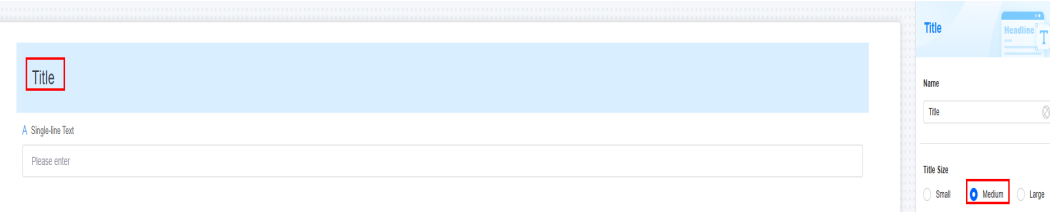
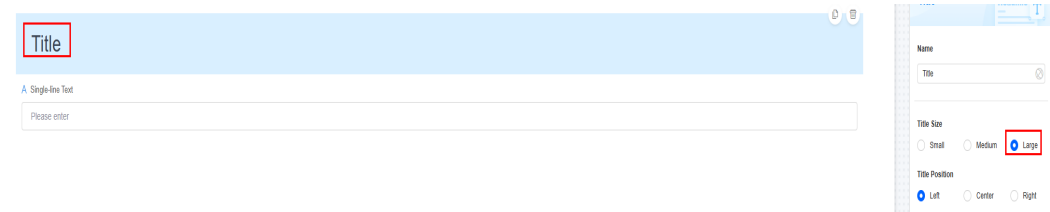


Figure 4-297 Large



Title Position

Set the title position. The options are **Left**, **Center**, and **Right**. Default is **Left**.

Figure 4-298 Left

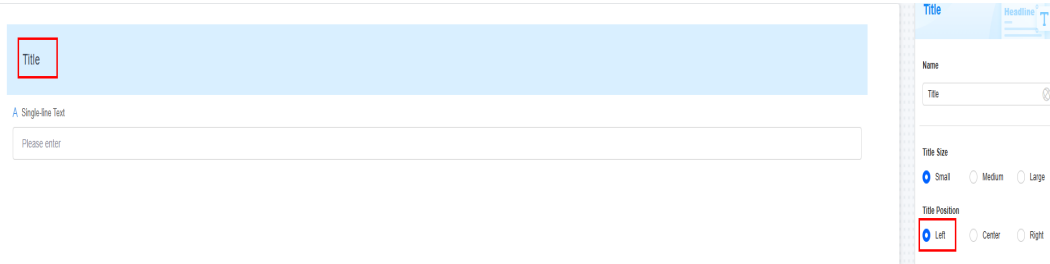


Figure 4-299 Center

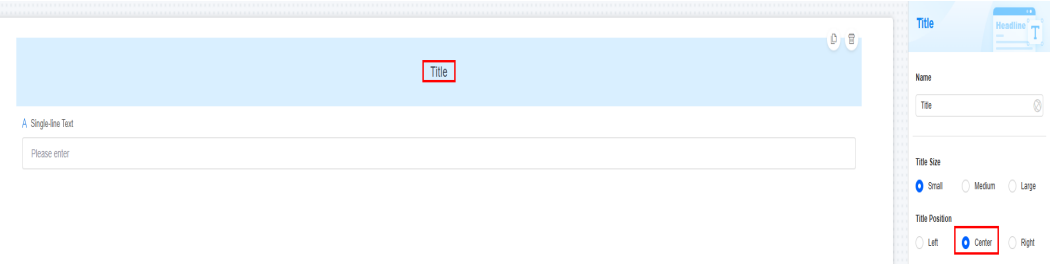
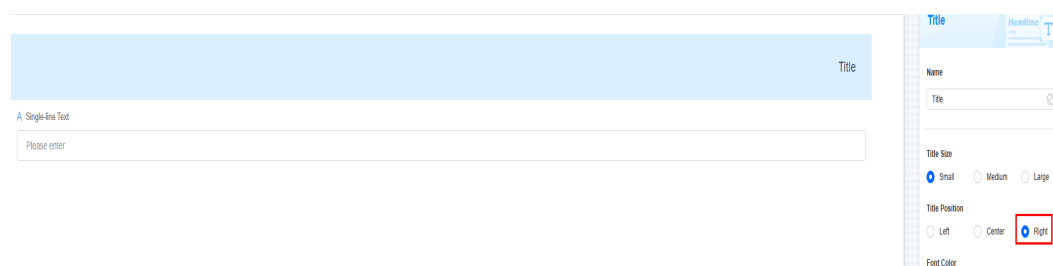


Figure 4-300 Right



Font Color


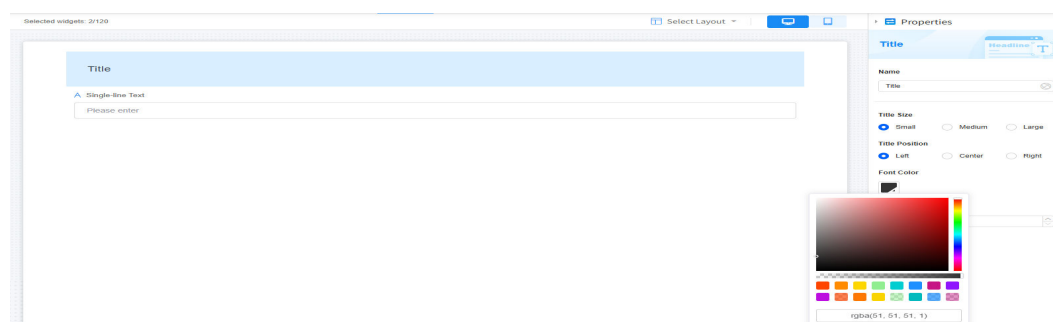
Set the title font color. Default is black. Adjust the color to improve readability and highlight key information. Click  to customize the color.

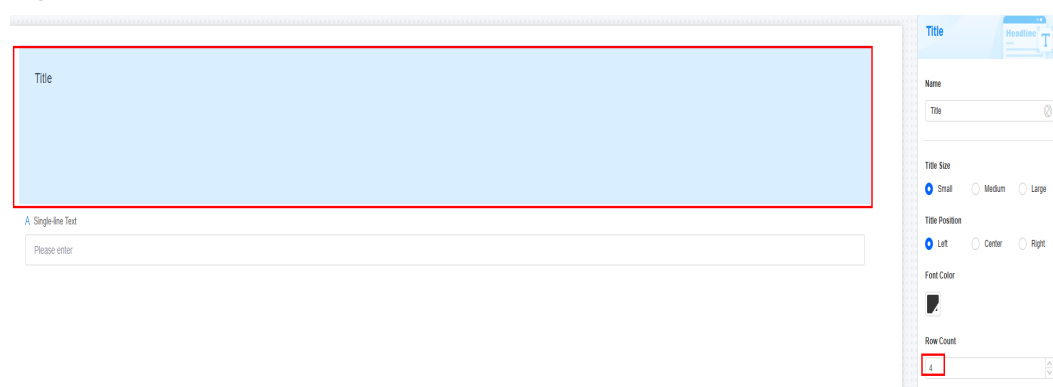
Figure 4-301 Setting the title font color



Row Count

Set the number of rows the title occupies on a page. The range is [1, 1,000]. For example, set the number to 4, as shown in [Figure 4-302](#).

Figure 4-302 Effect



Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-303 Hiding a field

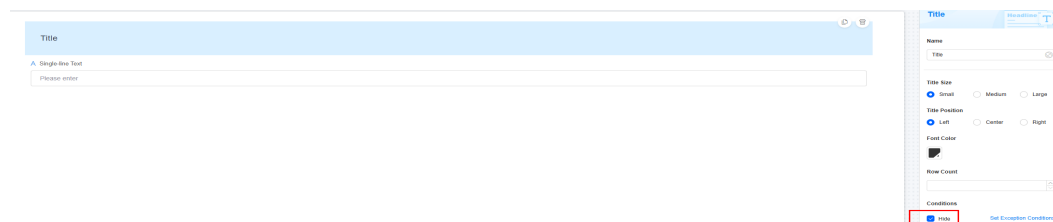
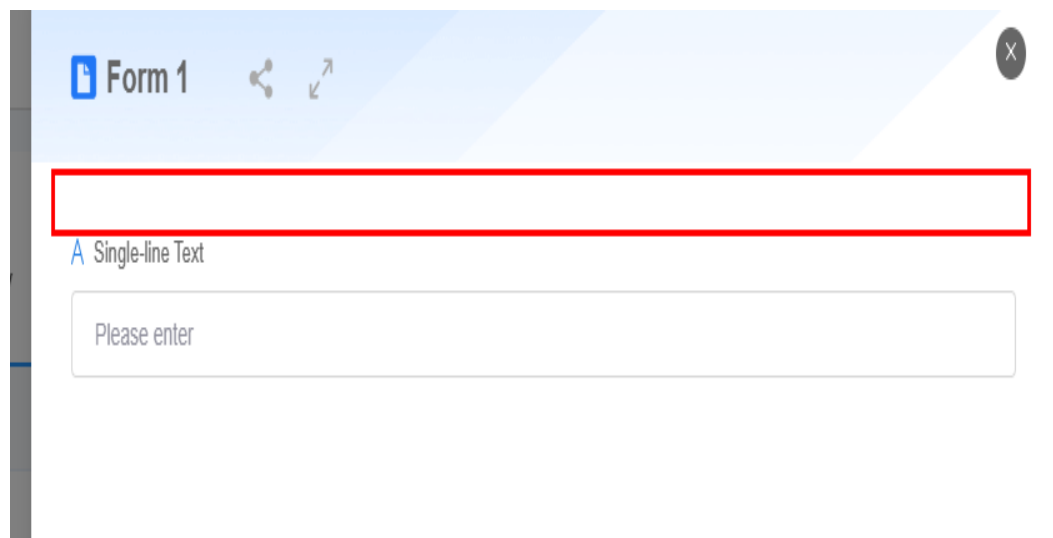


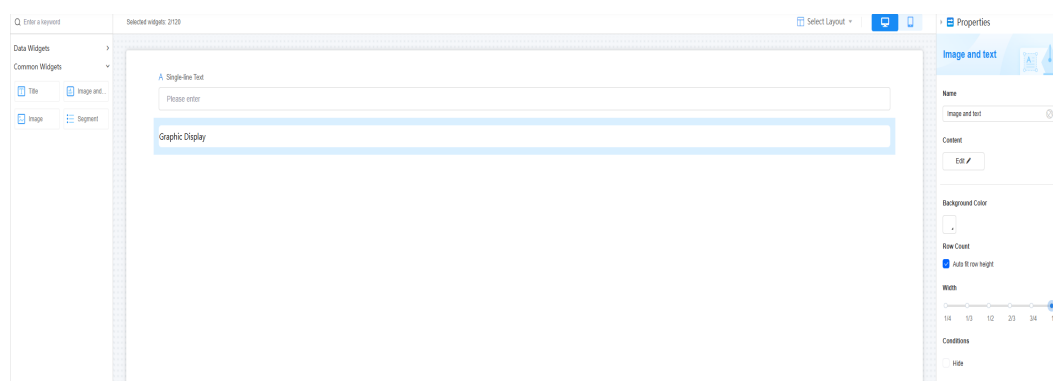
Figure 4-304 Effect



4.6.26 Setting Properties of the Images and Text Widget

This widget is a common web widget that provides the rich text display function. It is a common widget for enhancing appearance, not for user input.

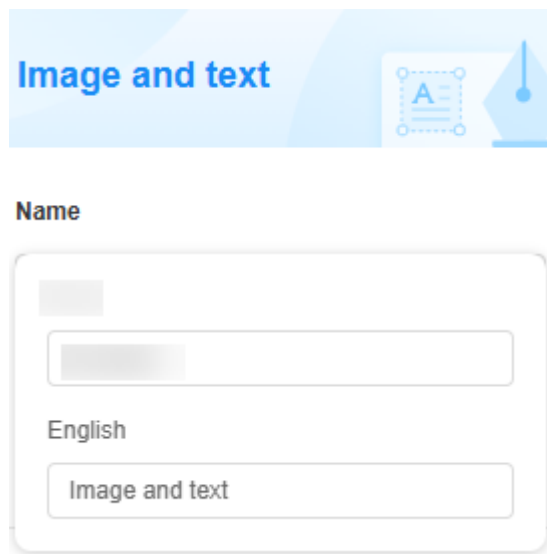
Figure 4-305 Images and text widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-306 Setting the field name (Chinese and English)

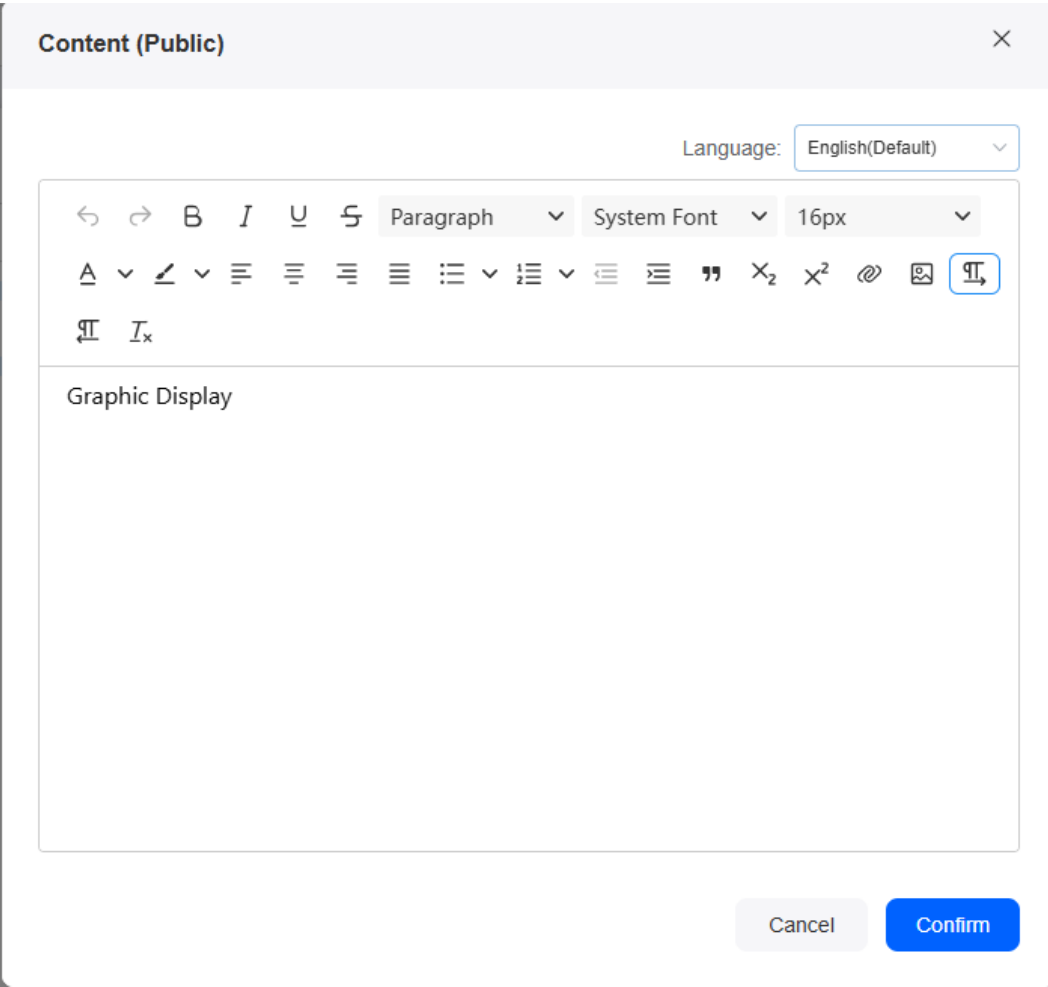


The screenshot shows the configuration interface for the 'Image and text' widget. At the top, there is a blue header bar with the text 'Image and text' and an icon of a document with a pencil. Below the header, the 'Name' section is visible, containing two input fields: one for the Chinese name and one for the English name. The English name field is currently set to 'Image and text'.

Content

Set the content to be displayed by the widget, which can be text, images, and hyperlinks.

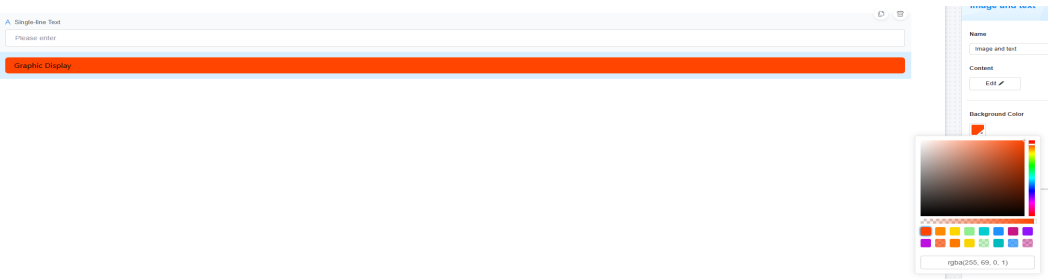
Figure 4-307 Setting the content to be displayed by the widget



Background Color

Set the background color of the widget. Properly setting the background color can improve the overall page aesthetics and user experience.

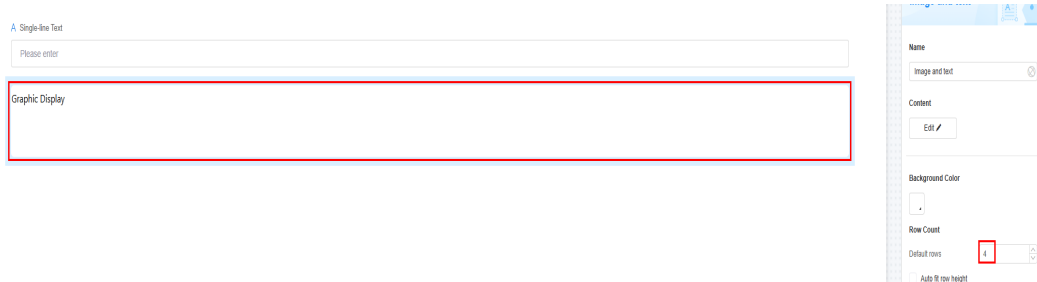
Figure 4-308 Effect



Row Count

Set the number of rows for the rich text on a page. You can set **Default rows** and select **Auto fit row height**. The value range of the default number of rows is [1, 1,000]. [Figure 4-309](#) shows an example with the default number of rows set to 4.

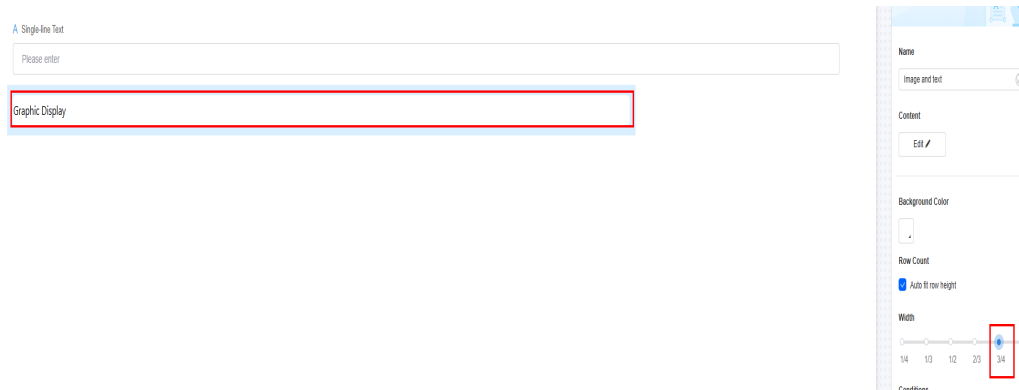
Figure 4-309 Effect of four rows



Width

Width: Widget width as a ratio of the page width. Set the widget width to make the page look better and more professional.

Figure 4-310 Setting the widget width



- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-311 Hiding a field

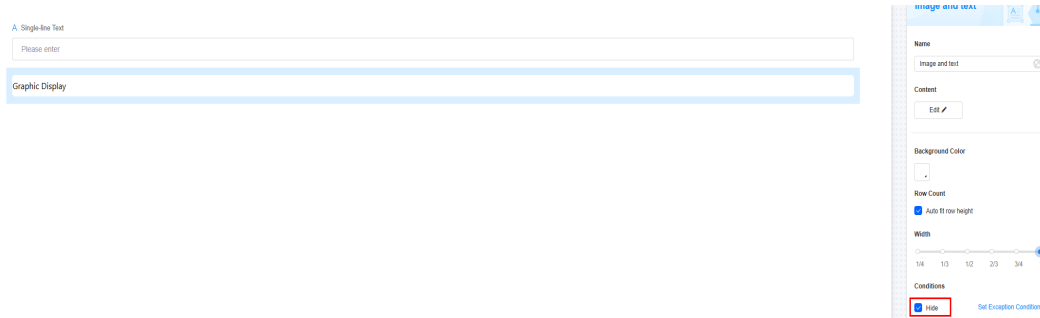
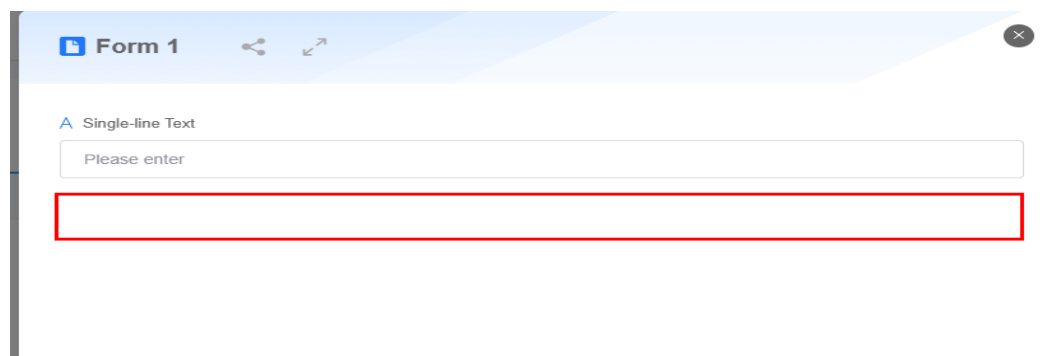


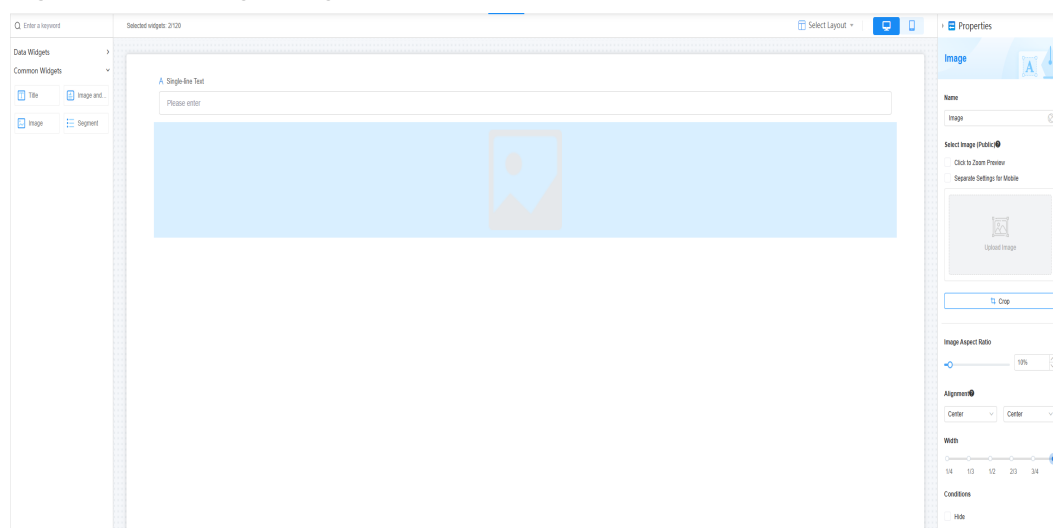
Figure 4-312 Effect



4.6.27 Setting the Properties of the Image Widget

This widget shows images on pages. It is a common widget for enhancing appearance, not for user input.

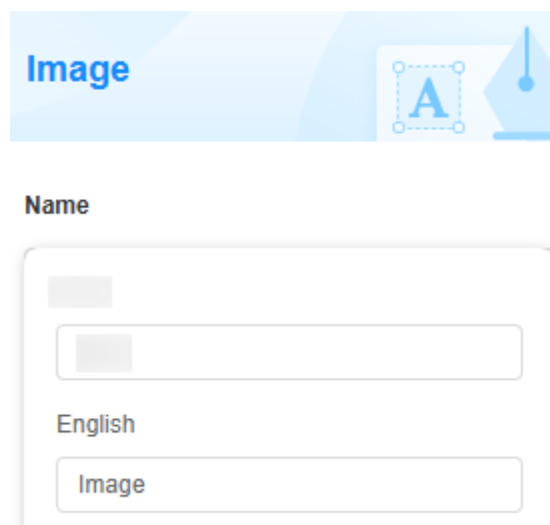
Figure 4-313 Image widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

Figure 4-314 Setting the field name (Chinese and English)




Selecting an Image

Add an image to the widget, like an ID card photo or invoice. The image must have a horizontal resolution of at least 1,280 pixels and a file size no larger than 3 MB. For mobile clients, select the mobile-specific option and upload images on the mobile client tab page, as shown in [Figure 4-316](#).


Figure 4-315 Uploading an image

Image



Name


Image



Select Image (Public)?

☐ Click to Zoom Preview

☐ Separate Settings for Mobile



Upload Image




 Crop


Figure 4-316 Uploading an image for the mobile client

Select Layout




Properties

Image



Name

Image




Select Image (Public)?

☐ Click to Zoom Preview

☒ Separate Settings for Mobile

PC

Mobile



Upload Image


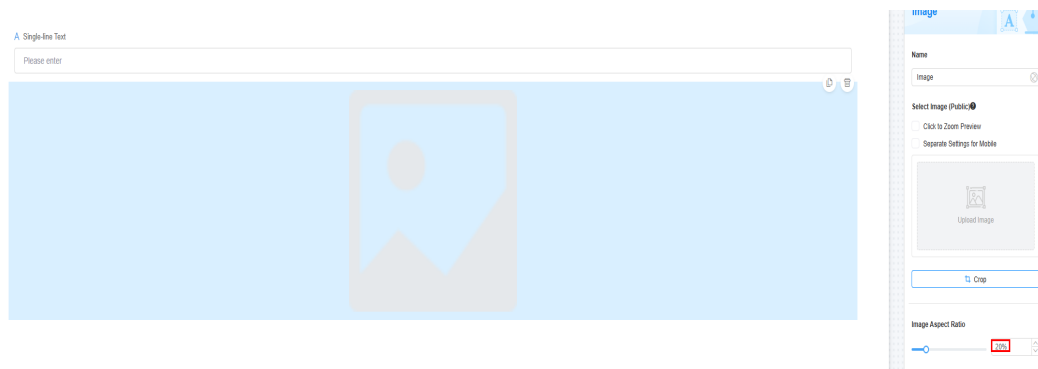
 Crop

Image Aspect Ratio

Set the image aspect ratio on a page. The range is [1%, 100%]. The default value is 10%.

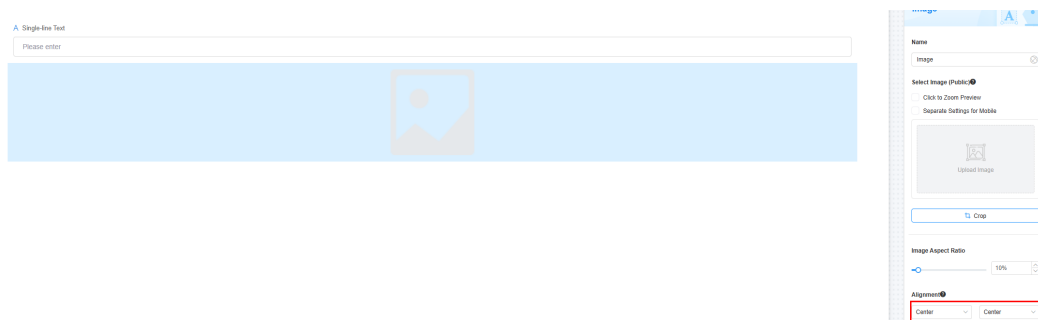
Figure 4-317 Setting the image aspect ratio



Alignment

Choose an image alignment option: **Center**, **Left**, **Right**, **Top**, or **Bottom**.

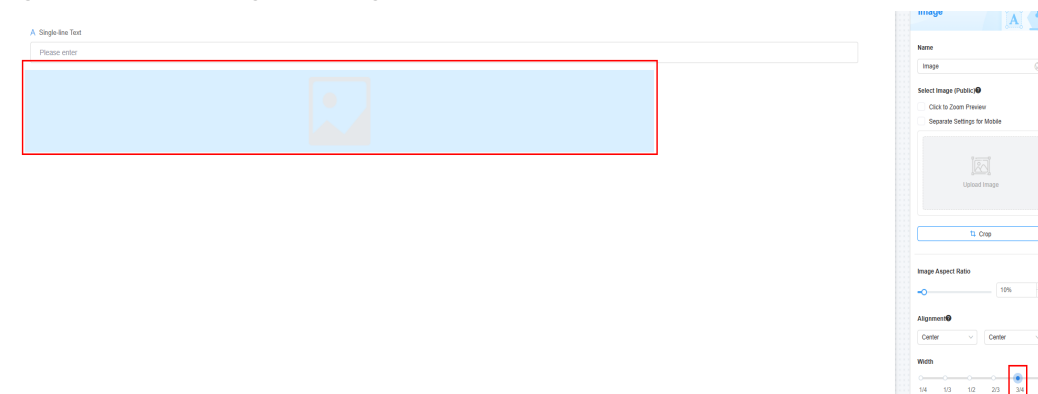
Figure 4-318 Setting the image alignment



Width

The width is the ratio of the widget's width to the page width. Set it to control each widget's layout and display, improving the page's appearance and usability.

Figure 4-319 Setting the widget width



- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-320 Hiding a field

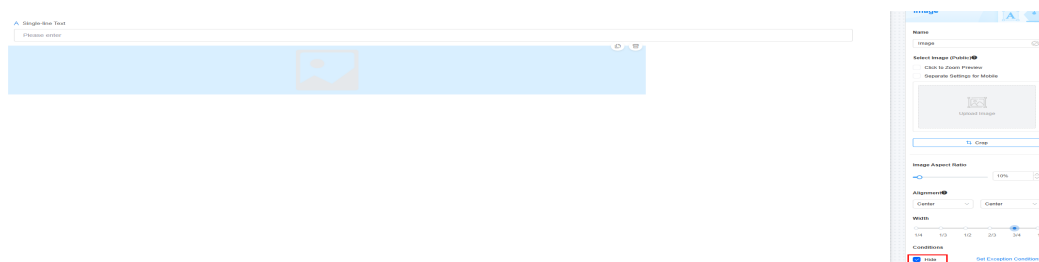
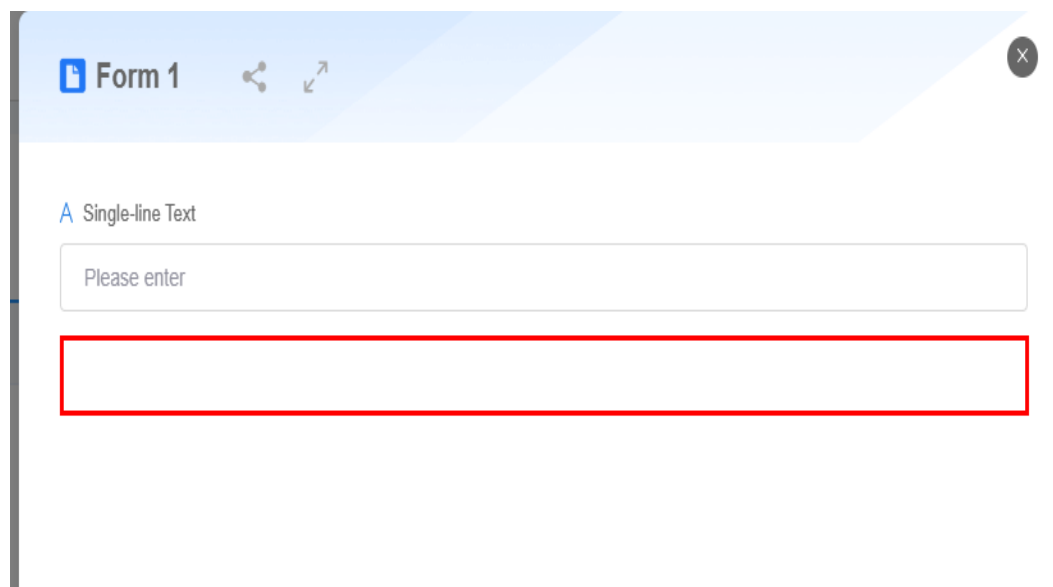


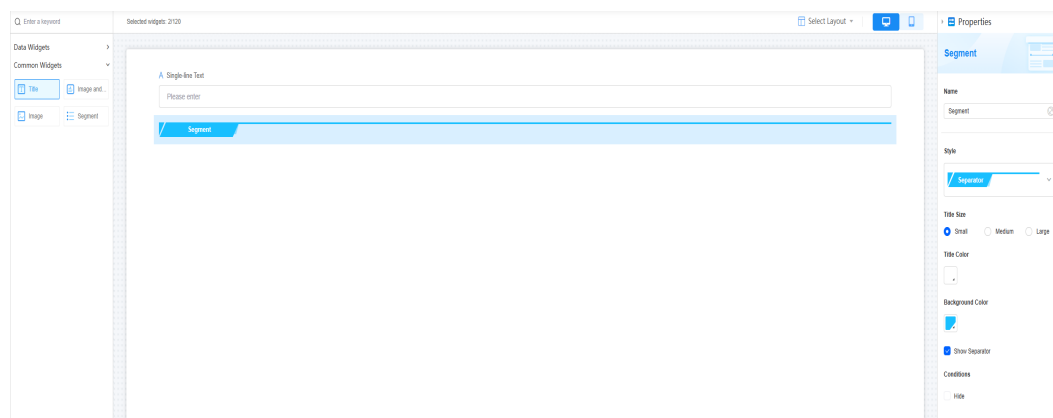
Figure 4-321 Effect



4.6.28 Setting the Properties of the Segment Widget

This widget helps explain information or divide a form into different parts for clearer structure. It is a common widget for enhancing appearance, not for user input.

Figure 4-322 Segment widget



Name

Set the field name shown to users. Click  to set Chinese and English names. Click **Reference Field** to copy another field's value to this field name.

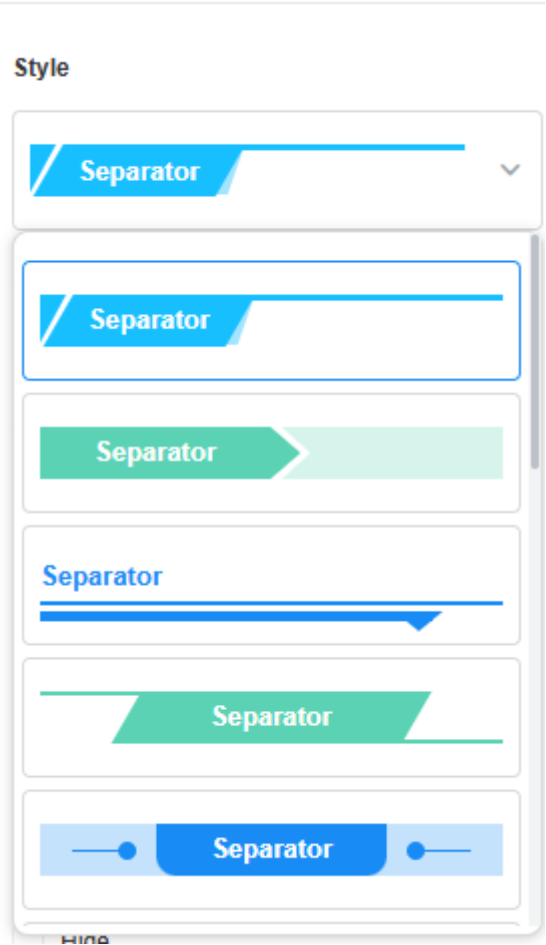
Figure 4-323 Setting the field name (Chinese and English)



Style

Set segment styles for the widget.

Figure 4-324 Choosing a style



Title Size

Set the font size of the title. The options are **Small**, **Medium**, and **Large**. Default is **Small**.

Figure 4-325 Small

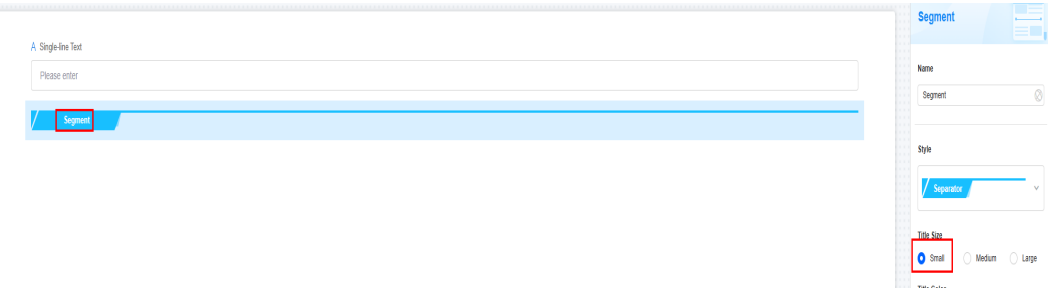


Figure 4-326 Medium

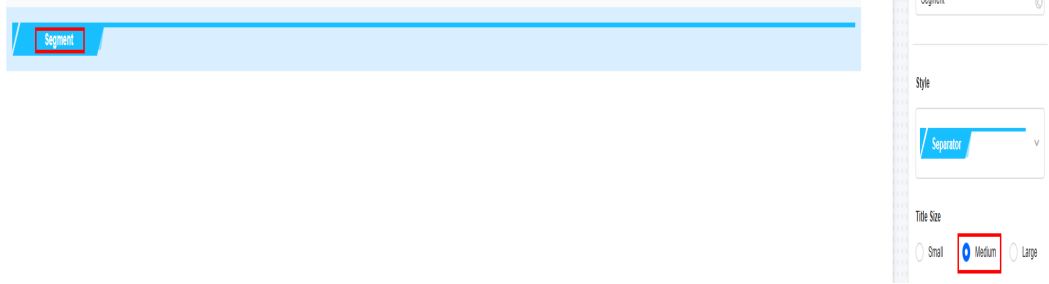
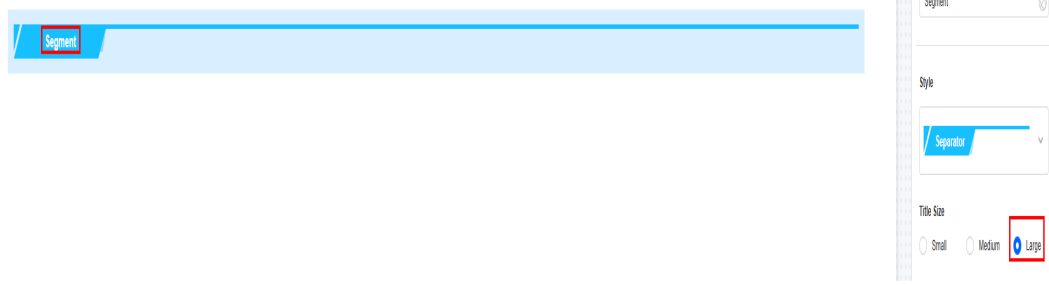


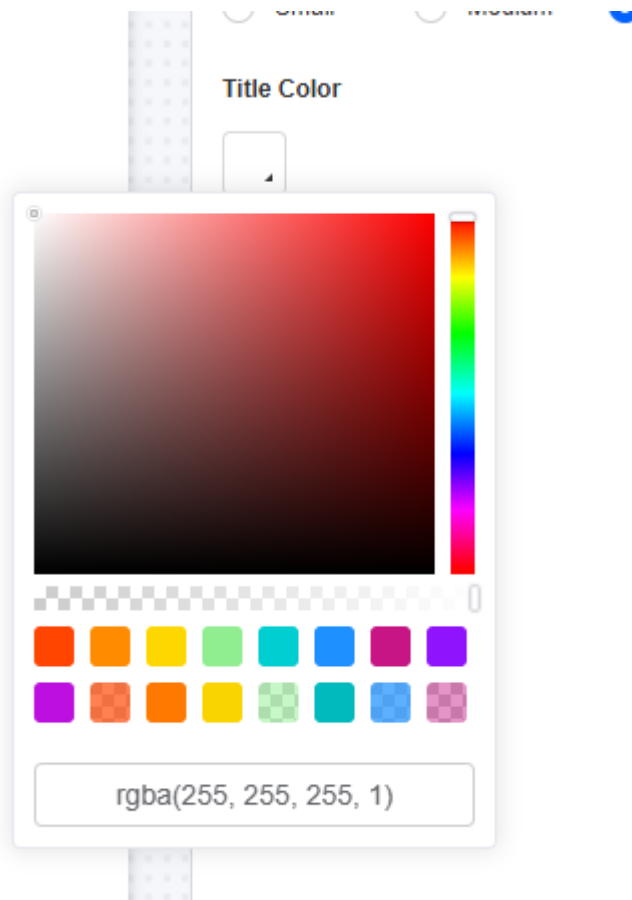
Figure 4-327 Large



Title Color

Set the title color.

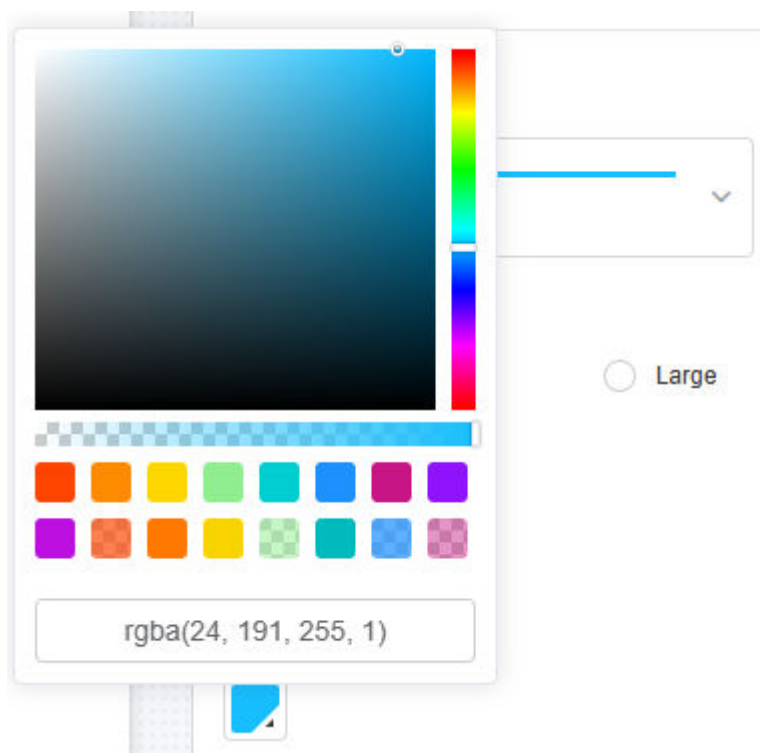
Figure 4-328 Setting the title color



Background Color

Set the background color of the widget.

Figure 4-329 Setting the background color of the widget



Separator

Set whether to show the dividing line for the widget.

Figure 4-330 Shows the dividing line



Figure 4-331 No dividing line



Conditions

Set the field properties. If you check **Hide**, the field will be hidden on the page.

Figure 4-332 Hiding a field

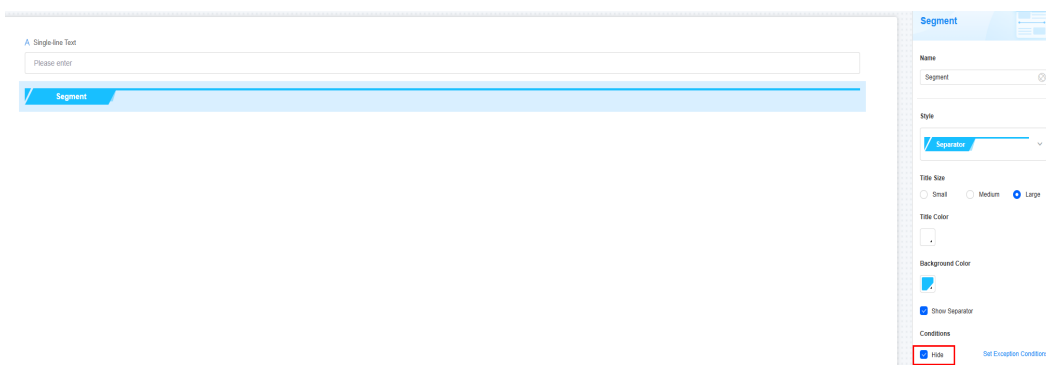
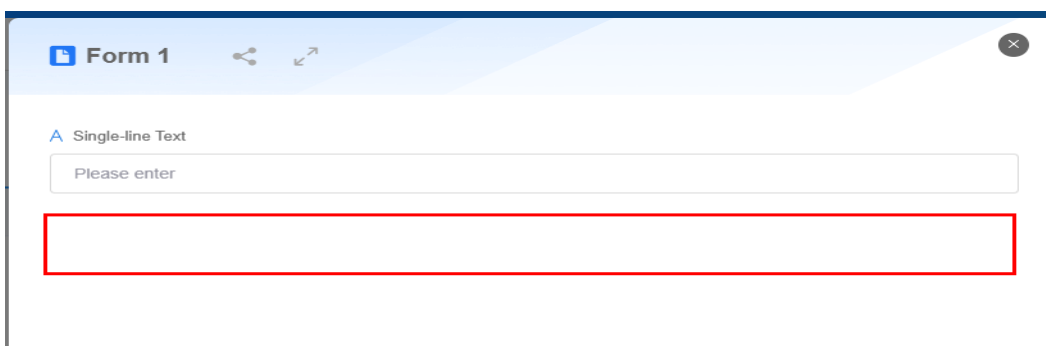


Figure 4-333 Effect

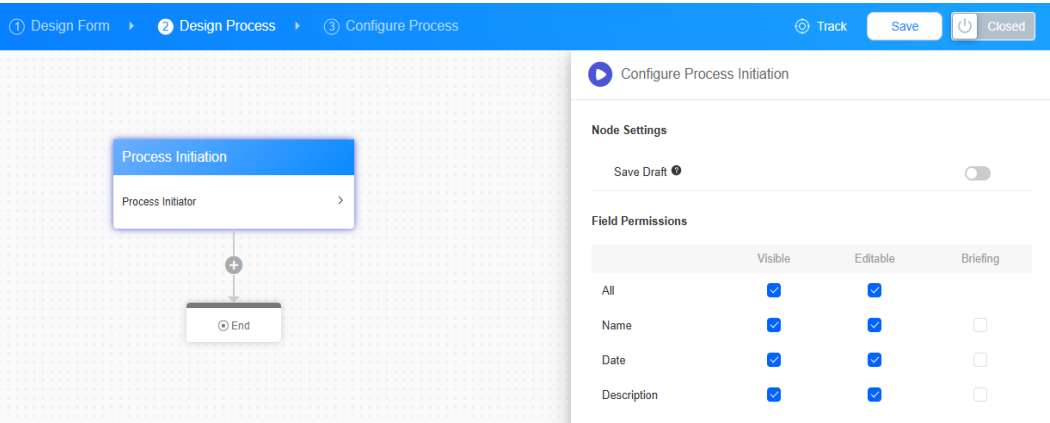


4.7 Setting Process Widget Properties

4.7.1 Setting the Properties of the Process Initiation Node

On the process design page, a process initiation node is automatically created. You can click it to set parameters.

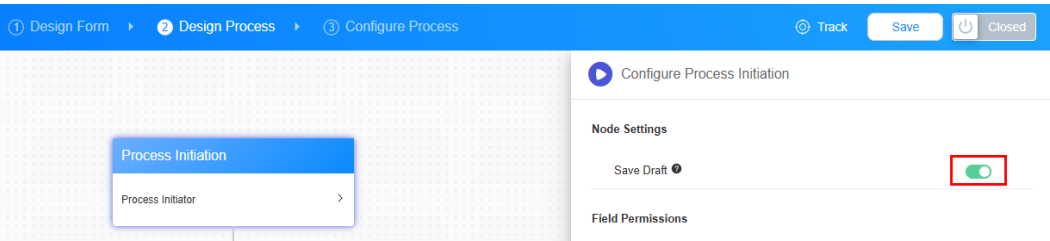
Figure 4-334 Process initiation



Node Settings

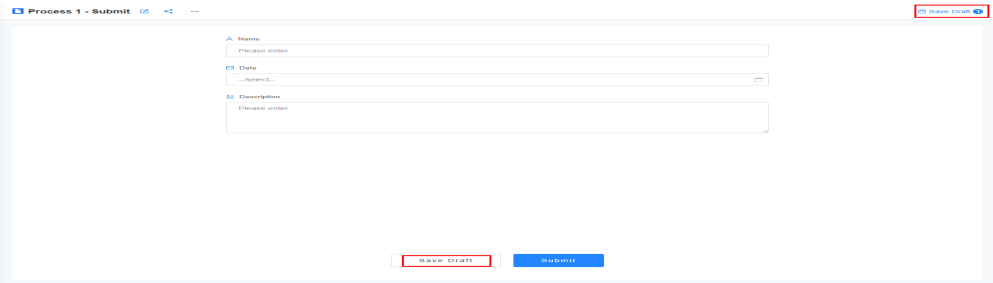
Save Draft: Indicates whether to enable temporary storage. By default, temporary storage is disabled. After enabling temporary storage, any form data you add on the process initiation page will be saved on the current node for future use. This feature supports up to **20** temporary storage records and does not advance the process.

Figure 4-335 Enabling the temporary storage function



After the temporary storage function is enabled, you can click **Save Draft** to store your form data temporarily.

Figure 4-336 Temporarily storing form data



Field Permissions

Set the permission of fields in the form, such as visible, editable, and abstract.

Figure 4-337 Setting field permissions in a form

Configure Process Initiation

Node Settings

Save Draft ?

☐

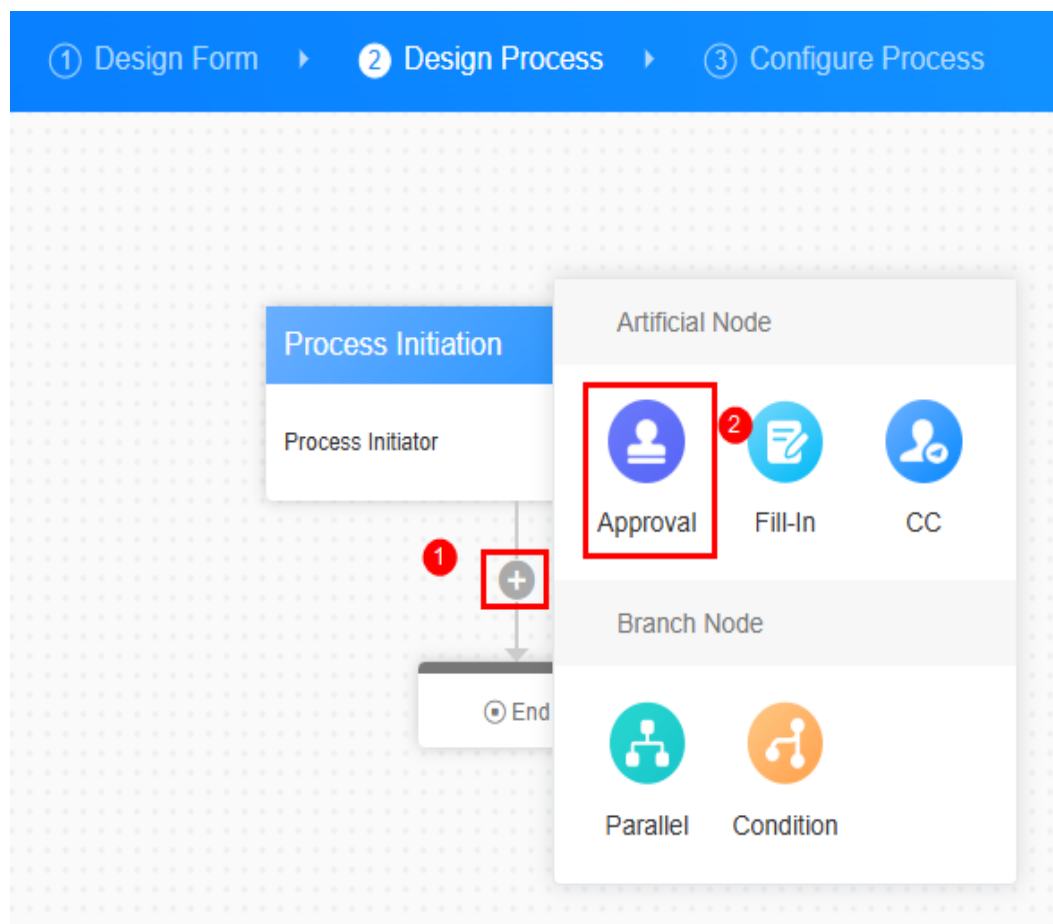
Field Permissions

	Visible	Editable	Briefing
All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

4.7.2 Setting the Properties of an Approval Node


An approval node is designed to handle approval tasks. It has the authority to approve, reject, or temporarily save tasks.

Figure 4-338 Approval node



Basic Settings

Figure 4-339 Basic settings


 Configure Approval


Basic Settings

Permissions

Advanced

Approver

 Add

 (Default) Process initiator


☐ CC Approval Result

For notification management, go to [Configure Process - Process Notifications](#) to set it up.


Approval Method (Multi-Approver)

☒ OR Sign: Any one approver can pass or reject

☐ AND Sign: Requires all approvers to participate


Title 

Please approve it




Action

Approve

Enabled 

Reject

Enabled 

Save Draft


Disabled 

Table 4-13 Parameters for basic settings

Parameter	Description
Approver	You can set an approver for the approval node. By default, the process initiator is the approver. You can click Add to choose a user or dynamic approver (like the process initiator or a reference field in a form) as the approver. If you select CC Approval Result , the outcome (approved or rejected) will be sent to CC recipients.
Approval Method (Multi-Approver)	If multiple approvers are selected, set the approval method. <ul style="list-style-type: none">• OR Sign: The process will go to next task if any approver finishes the approval.• AND Sign: The process will go to next task only when all approvers finish the approval.
Title	Title of the approval page.
Action	The buttons displayed on the page when the approval is approved or rejected. You can set the button names. After the temporary storage function is enabled, you can click Save Draft to store your form data temporarily.

Permissions

Figure 4-340 Field permission settings

Basic SettingsPermissionsAdvanced

Approver Permissions

	Visible	Editable	Briefing
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Table 4-14 Parameters for setting field permissions

Parameter	Description
Visible	Whether the current field is visible to the approver. If certain form fields should be hidden from the approver, set them to invisible.
Editable	Whether the approver can edit the form fields.
Briefing	Whether to display fields in the form as the abstract.

Advanced Settings

Figure 4-341 Advanced settings

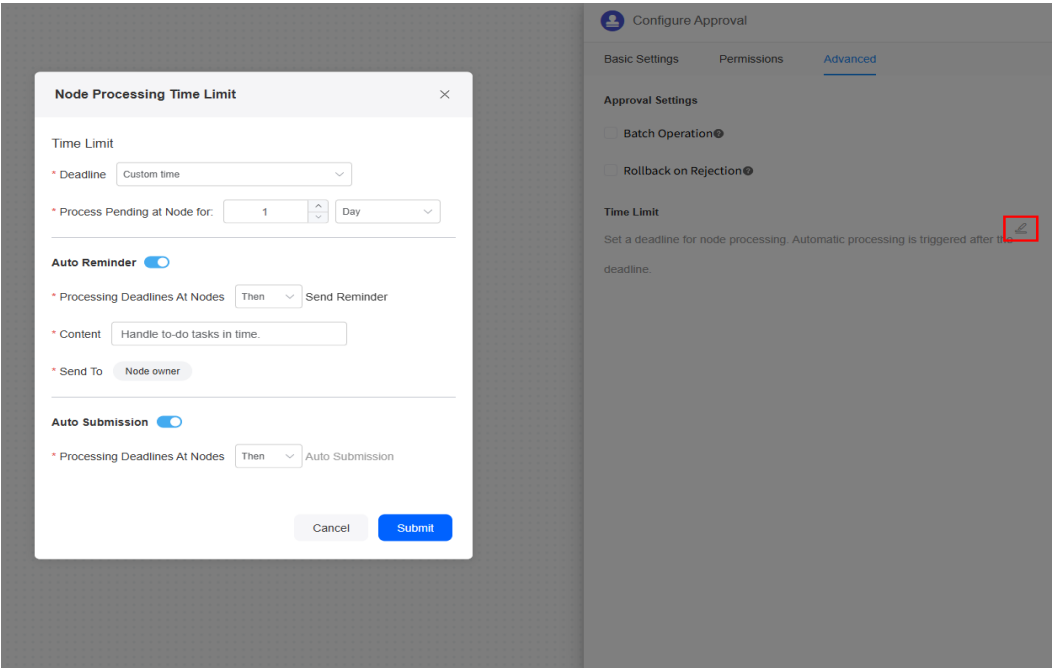


Table 4-15 Parameters for advanced settings

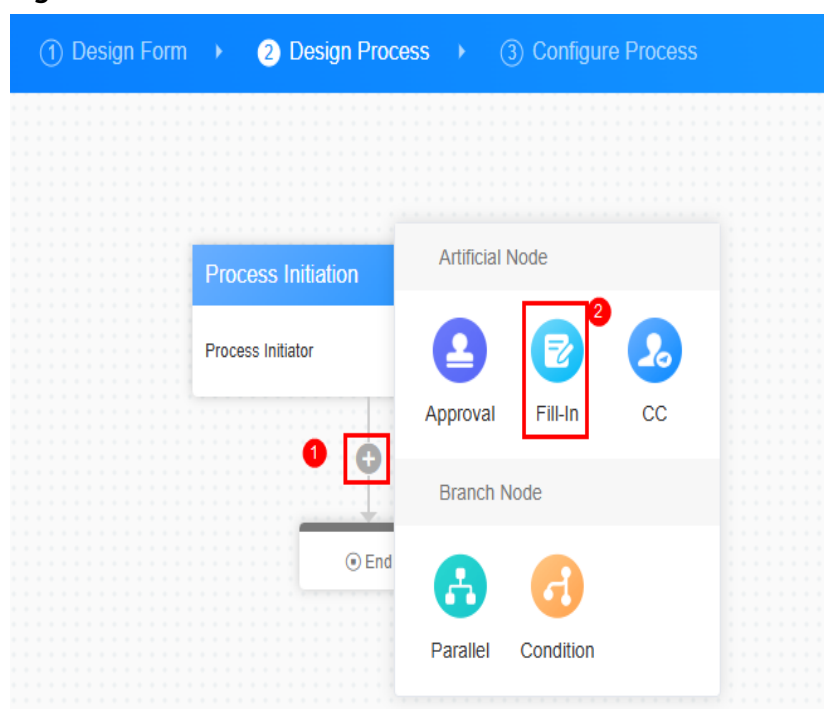
Parameter	Description
Approval Settings	<ul style="list-style-type: none">Batch operation: After this function is enabled, operations such as mandatory fields and approval comments will be ignored during batch processing. Exercise caution when enabling this function.Rollback on rejection: Backtrack from the current node to the previous approval node or process initiation node.

Parameter	Description
Node Processing Time Limit	<p>Set a deadline for node processing. Automatic processing is triggered after the deadline.</p> <ul style="list-style-type: none">• Time limit: Set the end time for node processing. You can customize it by specifying the date and time directly, or selecting a date and time field from the form.• Automatic reminder: Whether to enable automatic reminders. It is disabled by default.<ul style="list-style-type: none">– You can send a notification before, on, or after the node processing deadline.– Reminder content: Enter the reminder content, for example, "Handle to-do tasks in time."– Person to be reminded: The default value is the node owner.• Auto submission: Whether to enable auto submission. By default, it is disabled. Once enabled, you can set the node to be automatically submitted on or after the node processing deadline.

4.7.3 Setting the Properties of a Fill-In Node


This is a manual node for entering or supplementing information in a process. You can collect necessary data to ensure accurate information for subsequent steps.

Figure 4-342 Fill-in node



Basic Settings

Figure 4-343 Setting parameters


 Configure Fill-In


Basic Settings

Permissions

Advanced

Filled By


 Add

 (Default) Process initiator

Notification management is mainly based on [Process Configuration - Process Notification](#) , please move to set.

Title

Please fill and submit it



Buttons

Submit


Enabled ▼

Draft

Disabled ▼


Table 4-16 Parameters for basic settings

Parameter	Description
Filled By	Set the person who fills in the form. The default is the process initiator. Click Add to specify a user or dynamic approver (like the process initiator or a reference field specified in the form) as the person who fills in the form.
Title	Set the title of the page.

Parameter	Description
Buttons	Set a submit button for the form. You can click  to change the display name. After the temporary storage function is enabled, you can click Save Draft to store your form data temporarily.

Permissions

Figure 4-344 Field permission settings

 Configure Fill-In

Basic Settings

Permissions

Advanced

Fill in person form field permissions

	Visible	Editable	Briefing
All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Table 4-17 Parameters for setting field permissions

Parameter	Description
Visible	Whether the current field is visible to the person who fills in the field. If certain form fields should be hidden from the person who fills in the form, you can set the fields to be invisible.
Editable	Whether the person who fills in the form can edit the field.
Briefing	Whether to display fields in the form as the abstract.

Advanced Settings

In the advanced settings, set the expiration time for the node. After the expiration time expires, automatic processing is triggered.

Figure 4-345 Advanced settings

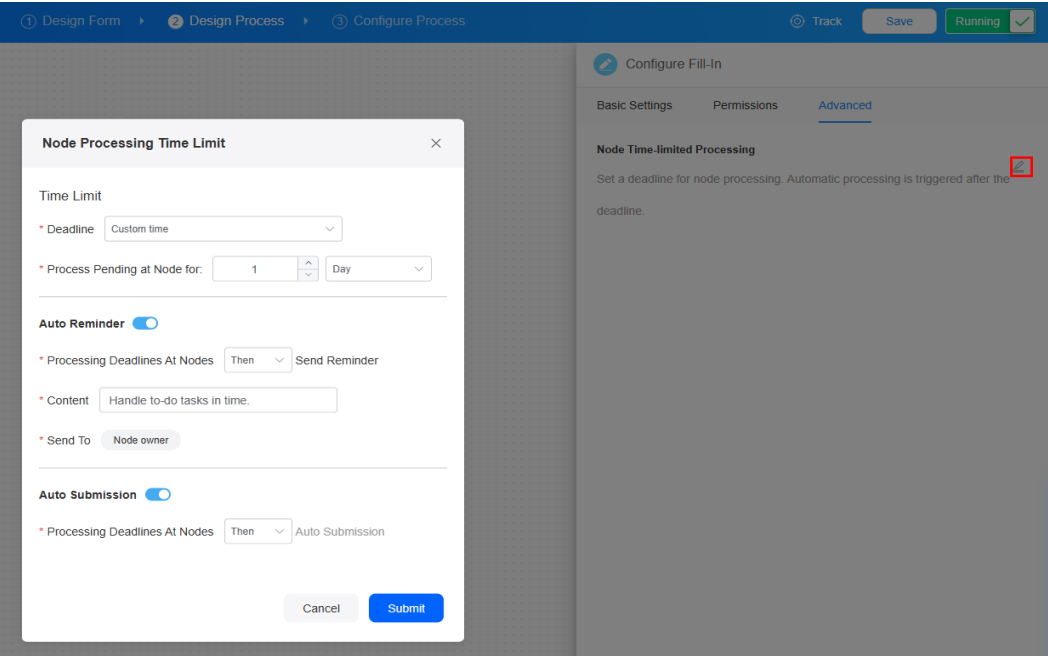


Table 4-18 Parameters

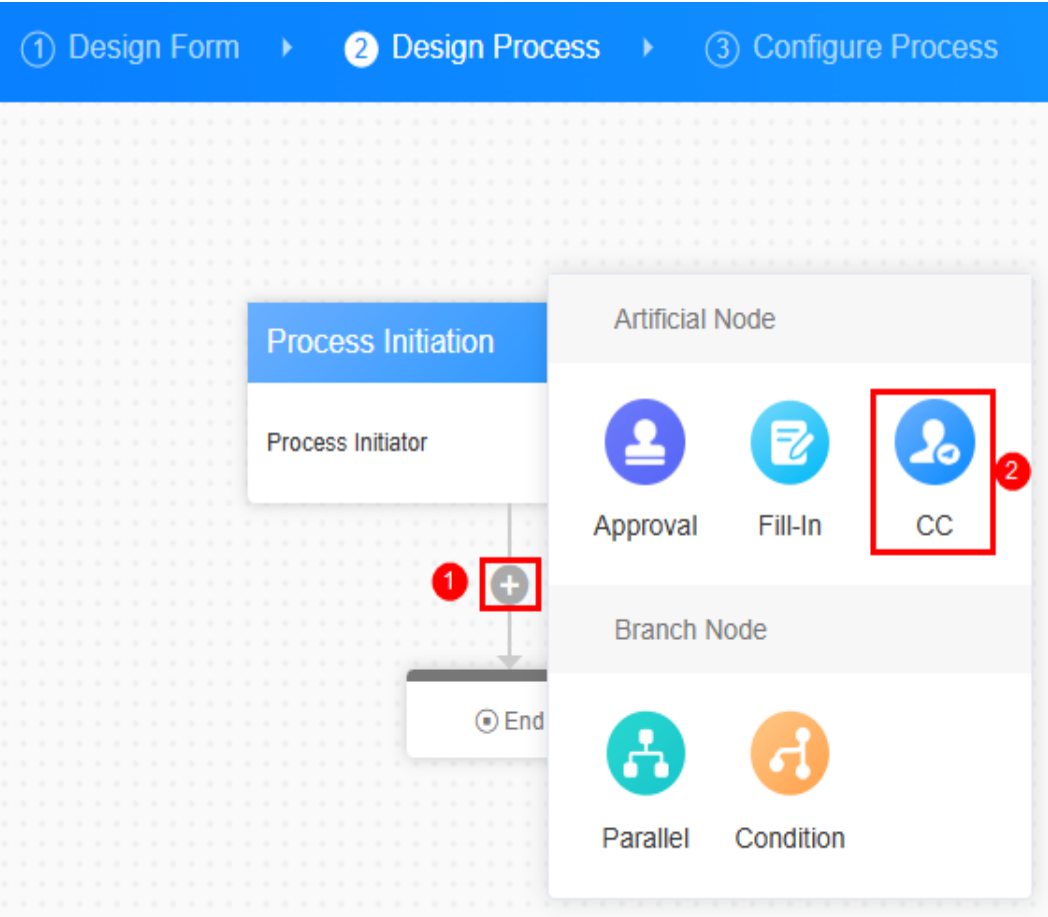
Parameter	Description
Node Time-limited Processing	<ul style="list-style-type: none">● Deadline: Set the end time for node processing. You can customize it by specifying the date and time directly, or selecting a date and time field from the form.● After reaching the node: The processing deadline is <i>N</i> days, <i>N</i> hours, or <i>N</i> minutes after the process reaches this node. This parameter needs to be set only when Deadline is set to Custom time.● Select time: Select a specific time as the deadline for node processing. This parameter needs to be set only when Deadline is set to Specify date and time.● Select date time field: Select the date and time field in the form as the deadline for node processing. This parameter needs to be set only when Deadline is set to Specify Date and Time field on the form.

Parameter	Description
Auto Reminder	Whether to enable automatic notification. This function is disabled by default. Once enabled, you can set the following parameters: <ul style="list-style-type: none">You can send a notification before, on, or after the node processing deadline.Reminder content: Enter the reminder content, for example, "Handle to-do tasks in time."Person to be reminded: The default value is the node owner.
Automatic Submission	Whether to enable automatic submission. This function is disabled by default. Once enabled, you can set the node to be automatically submitted on or after the node processing deadline.

4.7.4 Setting the Properties of a CC Node

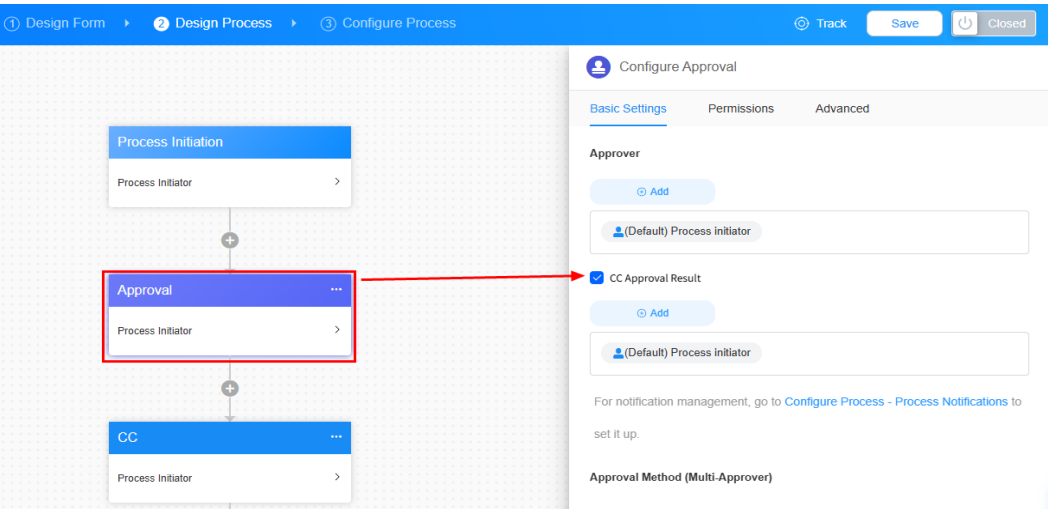
This is a manual node that synchronizes the approval result to a CC recipient after the approver finishes the approval. The CC recipient does not participate in the approval.

Figure 4-346 CC node



If the node before the CC node is an approval node, the process only reaches the CC node upon approval. If the approver rejects the request, the process ends or returns to the start. To notify the CC recipient of a rejection, check the CC Approval Result option in the approval node.

Figure 4-347 Selecting CC Approval Result




CC To

CC recipient. The default value is the process initiator. You can click **Add** to specify a user or dynamic approver (like the process initiator or a reference field in the form) as the CC recipient.

Figure 4-348 Setting persons to be copied to

CC To



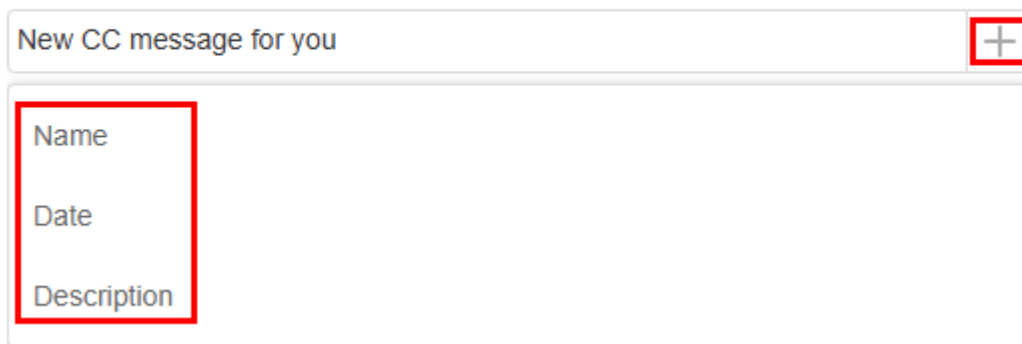
Manage notifications at [Process Configuration - Process Notifications](#)

Title

Set the CC title. You can click + to add fields in the form to the title.

Figure 4-349 Adding form fields to the title

Title



Field Permissions

You can set the permissions of fields in the form, such as **Visible** and **Briefing**.

Figure 4-350 Setting field permissions in a form

Title

New CC message for you

+

Field Permissions

	Visible	Briefing
All	<input checked="" type="checkbox"/>	
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

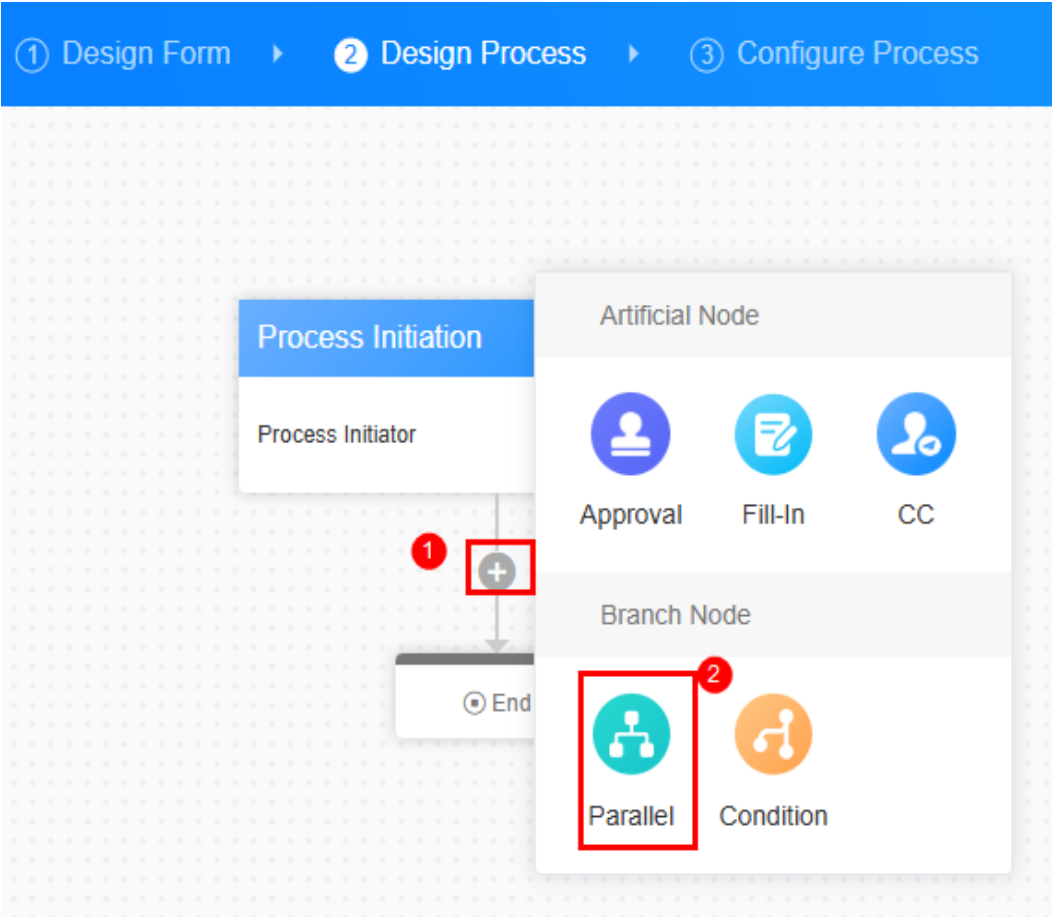
Table 4-19 Parameters for setting field permissions

Parameter	Description
Visible	Whether the current field is visible to the copy recipient. If certain form fields should be hidden from the copy recipient, you can set the fields to be invisible.
Briefing	Whether to display fields in the form as the abstract.

4.7.5 Setting Properties of a Parallel Branch Node

For parallel branches, there is no priority. All branches that meet the criteria are executed. For conditional branches, only the highest-priority branch that meets the criteria is executed.

Figure 4-351 Parallel branch node



Select a branch and click **Add** to add filter criteria.

Figure 4-352 Adding filter criteria

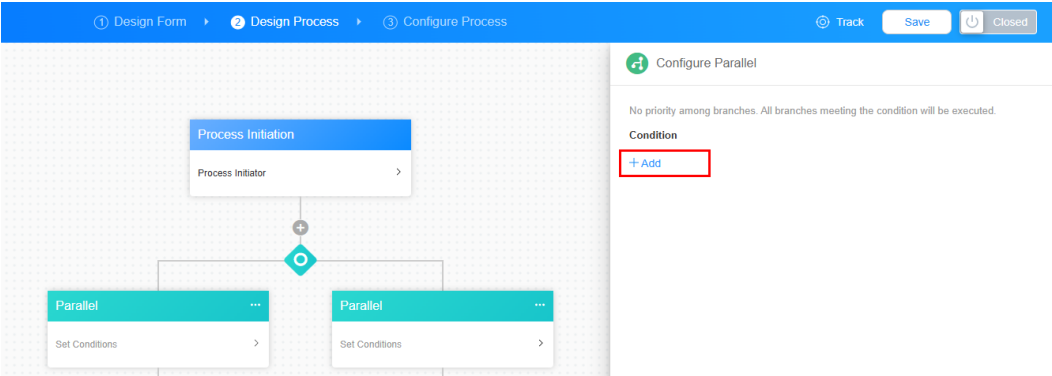


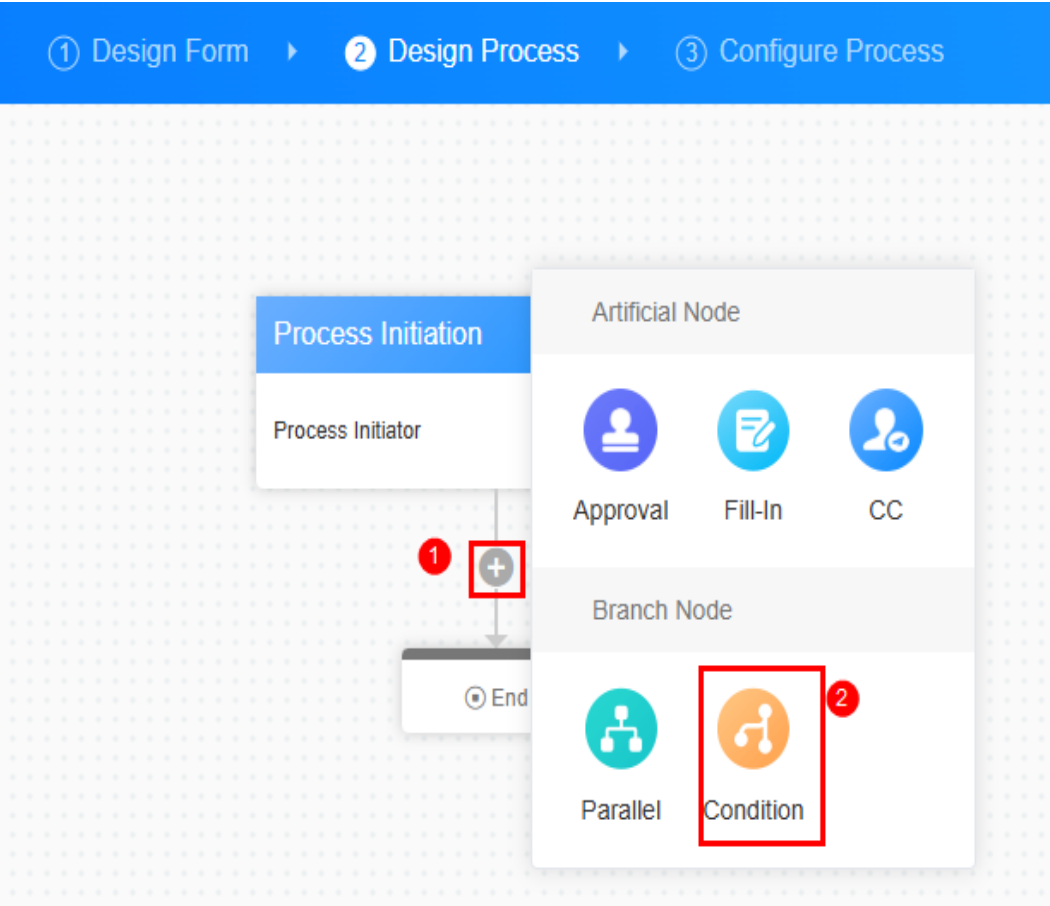
Figure 4-353 Setting filter criteria

The screenshot shows the 'Configure Parallel' configuration interface. At the top, there is a green icon with a plus sign and the text 'Configure Parallel'. Below this, a message states: 'No priority among branches. All branches meeting the condition will be executed.' Under the 'Condition' heading, there are two identical condition branches. Each branch consists of a 'Name' dropdown menu, an 'Include' dropdown menu, and an 'Enter' text input field. A red rectangular box highlights the first condition branch. To the right of the first branch, there is a red box containing the text 'and' followed by a downward arrow. Below the second branch, there is a blue '+ Add' button.

4.7.6 Setting Properties of a Condition Branch Node

Conditional branches have priorities, and only the highest-priority branch that meets the criteria is executed. In contrast, parallel branches have no priority and all branches that meet the criteria are executed.

Figure 4-354 Conditional branch node



Select a branch and click **Add** to add filter criteria.

Figure 4-355 Adding filter criteria

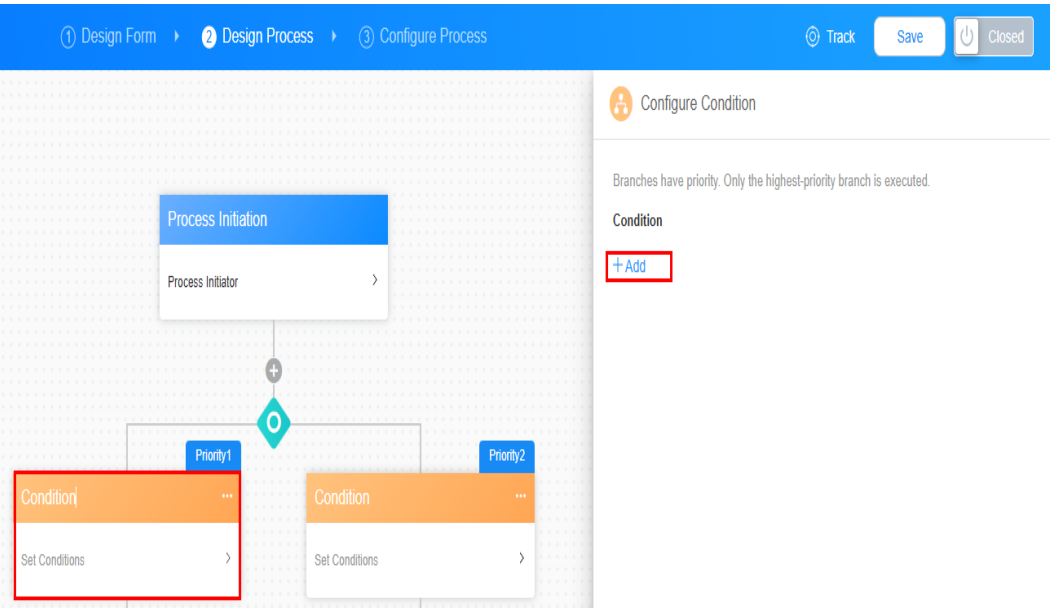


Figure 4-356 Setting filter criteria

The screenshot shows the 'Configure Condition' dialog box. At the top, there is a title bar with a person icon and the text 'Configure Condition'. Below the title bar, a note states: 'Branches have priority. Only the highest-priority branch is executed.' Under the 'Condition' section, there are two identical filter criteria, each enclosed in a red box. Each criterion consists of a 'Name' dropdown menu, an 'Include' dropdown menu, and an 'Enter' text input field. Between the two criteria, there is a red box containing the text 'or' followed by a dropdown arrow. At the bottom of the dialog, there is a '+ Add' button.

4.8 Customizing a Form

Setting Data Titles

To quickly identify form data, you can set a short name for each piece of data. This helps when linking records or viewing form details. For example, in a team member form, you can use the member's name as the data title.


- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the page, select the form to be set and click . The form editing page is displayed.
- Step 4** Click **Form Settings** on the right of the page.
- Step 5** In the navigation pane, choose **Data Title** and set the data title.

Figure 4-357 Setting data titles

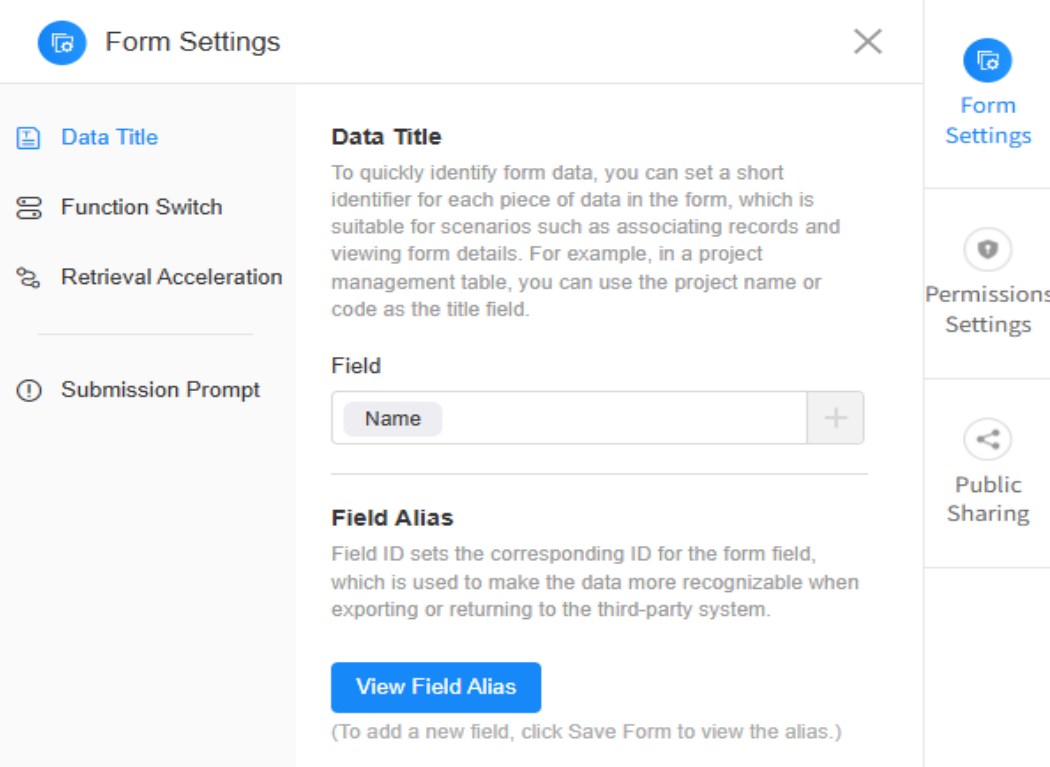


Figure 4-358 Viewing field aliases

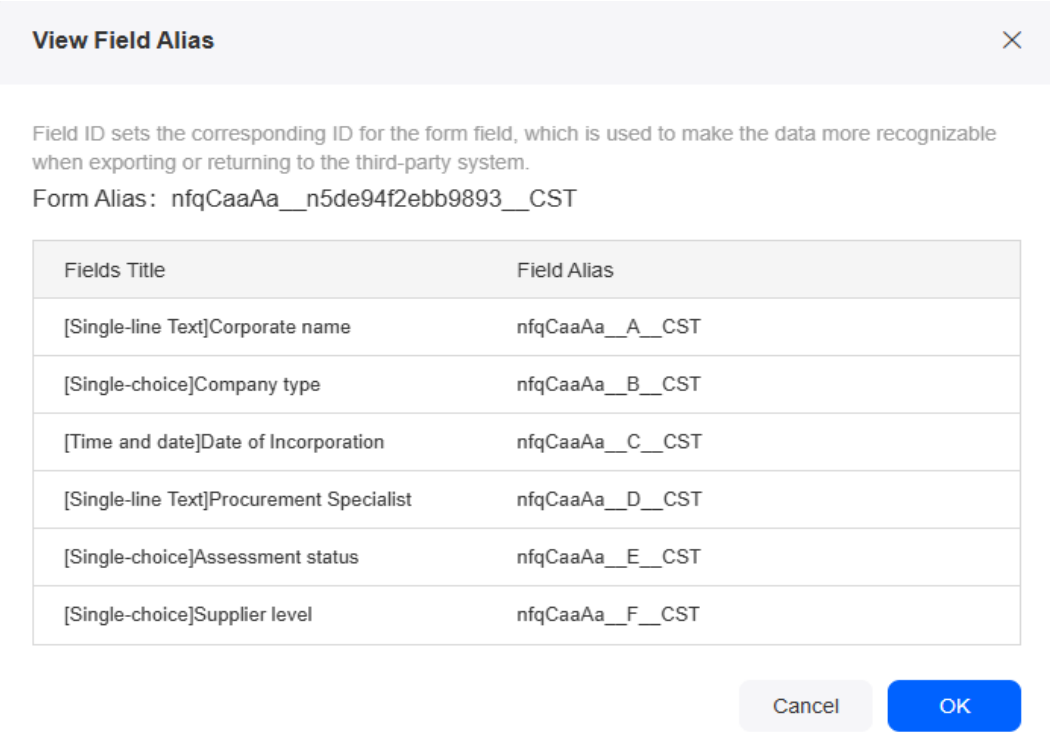


Table 4-20 Data title parameters

Parameter	Description
Field	Set the title field, click +, and select a field in the form.
Field Alias	Set names for form fields to make data export or transfer to third-party systems easier. You can click View Field Alias to view the aliases of the form and fields in the form.

----End

Setting Function Switches

Customize the form page's function switches to make the form easier to use.


- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the page, select the form to be set and click . The form editing page is displayed.
- Step 4** Click **Form Settings** on the right of the page.
- Step 5** In the navigation pane, choose **Function Switch** and configure general and sharing settings.

Figure 4-359 General and sharing settings

Form Settings

Data Title

Function Switch

Retrieval Acceleration

Submission Prompt

General Settings

Field Icon

After opening, when filling in the form data, the corresponding icon will be displayed in front of each field name

Field No.

After opening, field sorting will be displayed before each field name when filling in form data

Frontend Cache

Based on the current browser cache, the last unsubmitted form data will be automatically loaded after opening

Set as Privacy Form

After a form is open, it cannot use system privacy fields, and this switch cannot be turned off again.

Share Settings

Progress Bar

After opening, the shared form page will display a progress bar when filling in data

Language Switch

After opening, all sharing pages (forms/views/statistics, etc.) under this form will take effect

Form Settings

Permissions Settings

Public Sharing

Figure 4-360 Effect

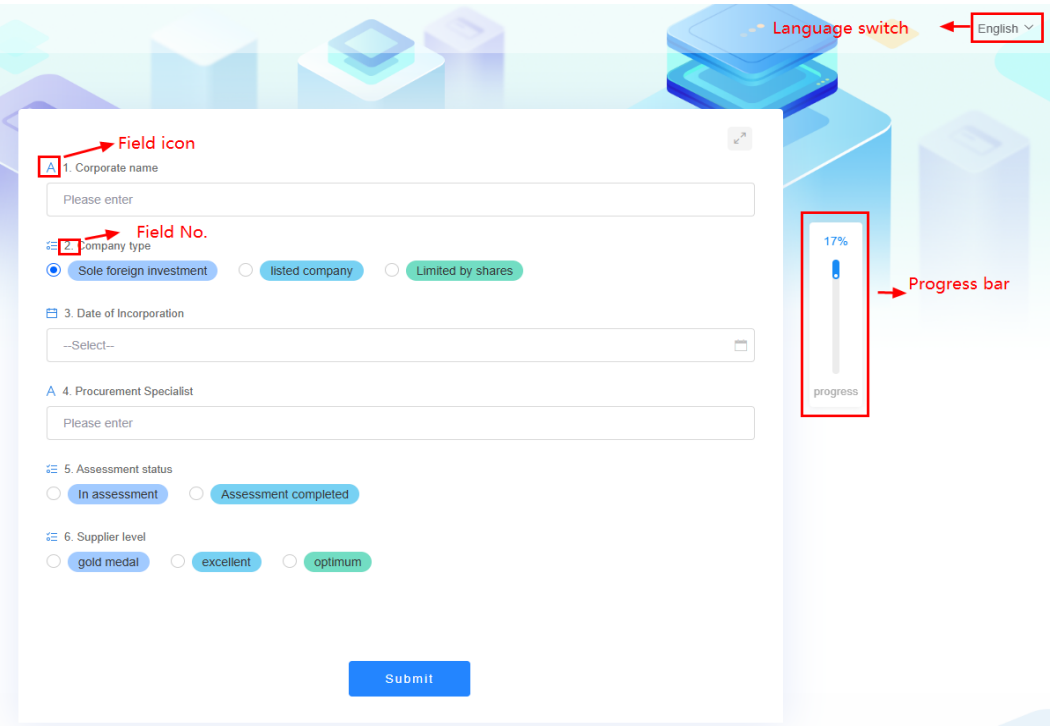


Table 4-21 Function switch parameters

Parameter	Description
Field Icon	If enabled, an icon will appear before each field name.
Field No.	If enabled, a sequence number will appear before each field name.
Frontend Cache	If enabled, the system will save unsaved data, preventing it from being lost if users accidentally close the page.
Set as Privacy Form	If enabled, the form cannot use system privacy fields and cannot be closed again. Exercise caution when enabling this function.
Progress Bar	If enabled, a progress bar will show when users open the shared form to fill in data.
Language Switch	If enabled, a language switch will show on all shared pages (forms, views, and statistics).

-----End

Retrieval Acceleration

Proper indexes are created to accelerate data search under specific query conditions.


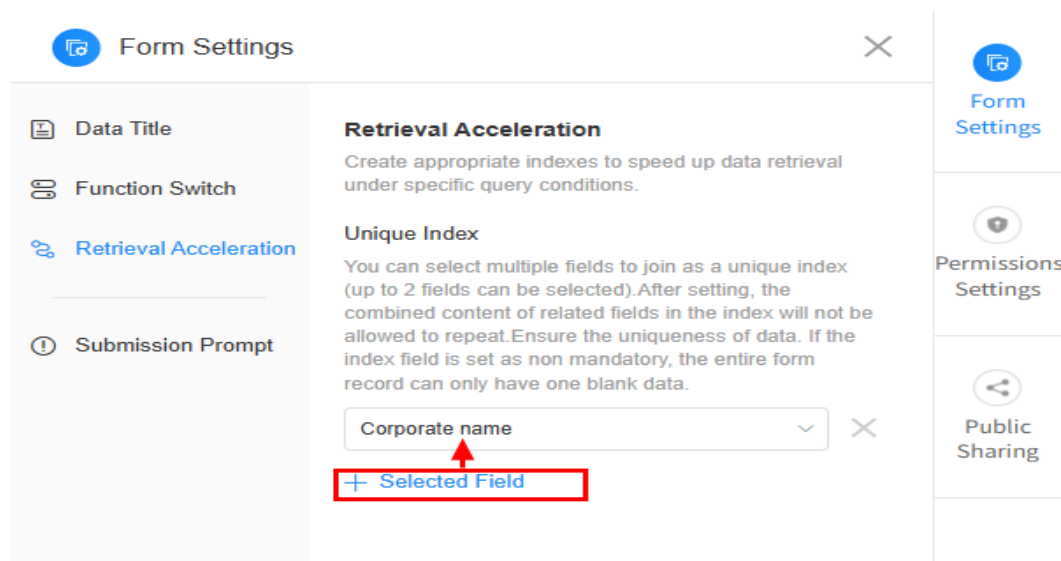
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the page, select the form to be set and click . The form editing page is displayed.
- Step 4** Click **Form Settings** on the right of the page.
- Step 5** In the navigation pane, choose **Retrieval Acceleration**.


Figure 4-361 Retrieval acceleration settings**Table 4-22** Retrieval acceleration parameters

Parameter	Description
Unique Index	You can choose up to two fields as a unique index. After setting, the combination of these fields must be unique. If the index field is optional, only one record with empty data is allowed in the entire form.

----End

Submission Prompts

Set a message to show after submitting the form to improve user experience.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the page, select the form to be set and click . The form editing page is displayed.

Step 4 Click **Form Settings** on the right of the page.

Step 5 In the navigation pane, choose **Submission Prompt**.

Figure 4-362 Submission prompt settings

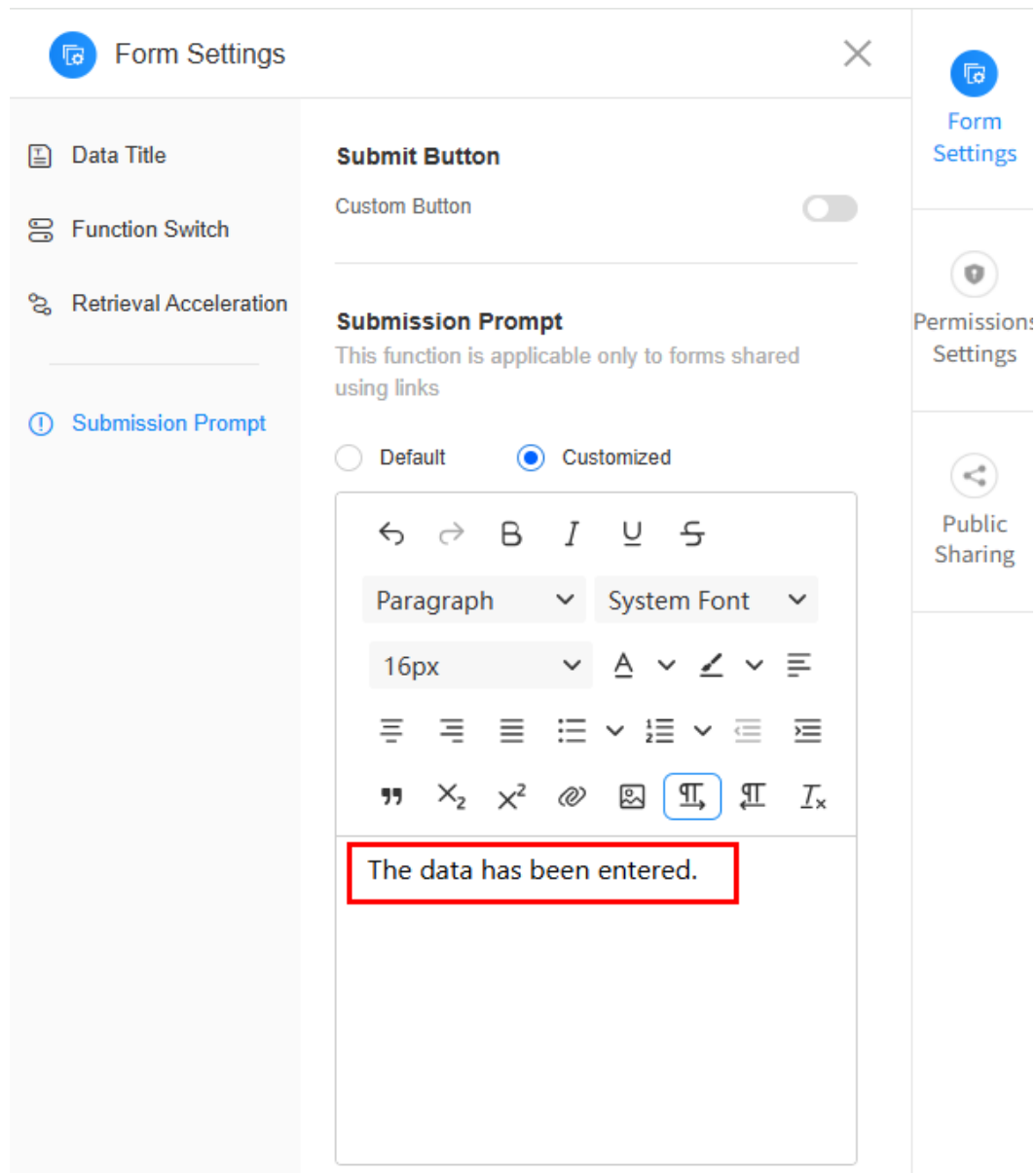


Figure 4-363 Effect

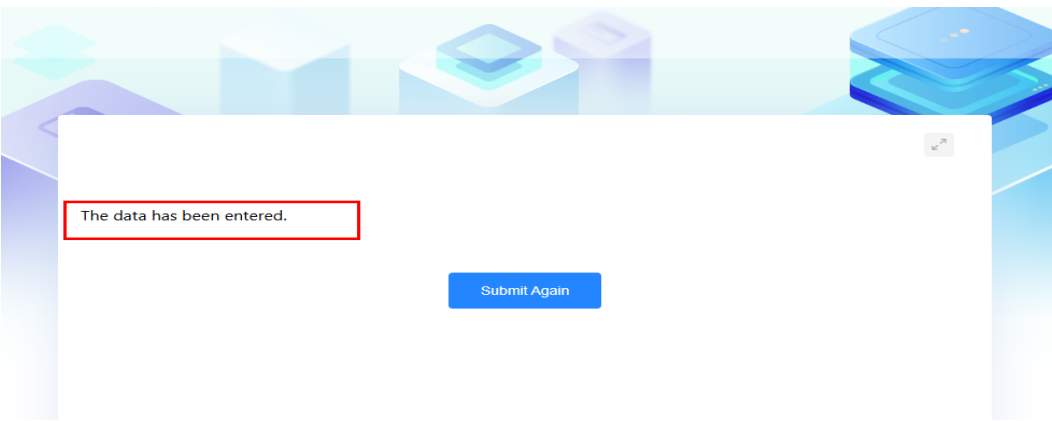


Table 4-23 Submission prompt parameters

Parameter	Description
Submit Button > Custom Button	Customize the submit button text. Internationalization is supported.
Submission Prompt	This applies to forms shared via links. The configured prompt will show when data is submitted. For example, if the prompt message is set to "Please fill in data", the latest effect is shown in Figure 4-363 .

----End

4.9 Setting the Form Visibility Permission

After you make a form, you can choose who can see it. This keeps data safe. For example, in a salary system, only directors and HR staff can see the salary check form. Other workers can only see their own salary details.

Procedure


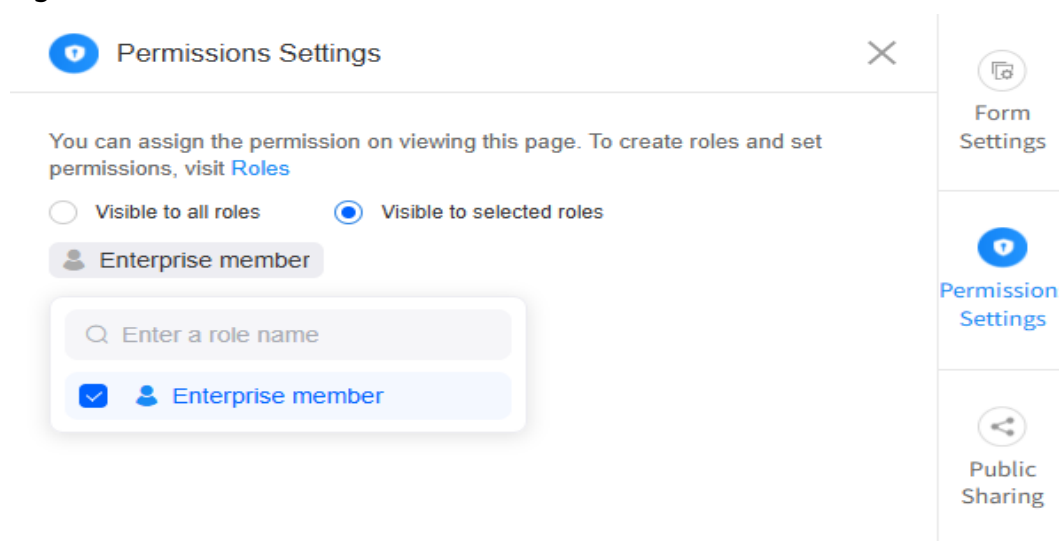
- Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3 On the left of the page, select the form to be set and click . The form editing page is displayed.
- Step 4 Click **Permission Settings** on the right of the page.

Figure 4-364 Visible to selected roles**Table 4-24** Parameters for setting permissions

Parameter	Description
Visible to all roles	All roles in the configuration center can view the form, including preset roles and custom roles.
Visible to selected roles	Only the selected roles can view the form.

----End

4.10 Sharing Forms

You can open forms via a link or QR code without logging in. This is useful for large-scale data collection such as surveys or event sign-ups.

Procedure


- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the page, select the form to be set and click . The form editing page is displayed.
- Step 4** Click **Public Sharing** on the right of the page.

Figure 4-365 Public sharing settings

Public Sharing

×

Share forms via link or QR code without requiring login.

[External sharing privacy statement](#)

Public Submission ☒

Enable submissions without login via the generated form link.

Note: User, OCR, department, and location widgets cannot be used in publicly shared forms. These fields will be hidden.

https://

Open

Copy

QR code

Public Query ☒

Share data via public link or QR code without requiring login.

https://

Open

Copy

QR code

Set Query Condition

Form Settings

Permission Settings

Public Sharing

Issue 01 (2025-08-21)

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285

Figure 4-366 Setting query criteria

Set Query Condition

*Condition

Define multiple required query fields.

Company type

*Result View

All

*Page Title

Public Query

Cancel

OK

Table 4-25 Parameters for setting public sharing

Parameter	Description
Public Submission	If enabled, you can use the form link to access and fill out the form without logging in. Click Generate Poster in the QR code to generate a poster for the form. For details, see Generating a Poster from a Form . User, department, and location widgets are hidden in publicly shared forms.
Public Query	If enabled, you can access data via the form link or QR code without logging in. Click the button to set query criteria. See Figure 4-366 . Access link shows only after public query criteria are set.

----End

4.11 Creating a Form Filling Page for a Form

You can create a data entry page for users to vote, answer surveys, or clock in/out. You can also set the following rules:


- Whether the form can be filled in for multiple times.
- Title content and style of the form.
- Form background.

- Whether only some fields need to be disclosed for data collection.
- Whether to set a validity period for the form. The form cannot be submitted after the validity period expires.
- Distribute multiple information filling pages based on different conditions.

Procedure

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 On the left of the displayed page, select the form to be edited and click .

Step 4 On the **Form** tab page, click + next to **Form Template** in the upper left corner of the page to create a form filling page.

Step 5 Drag the widgets you need (like the title) from the **Common Widgets** area to the form. Then set the title's content, size, position, and color.

To hide a widget on the form, delete it by clicking the delete button above it. Deleted widgets can be found in the unpublished field area.

Step 6 Click **Filling Settings** on the right.

Figure 4-367 Form filling page settings

Filling Settings

Filling Settings

Permission Settings

Sharing settings

Navigation Pane

Once enabled, the filling page can be accessed via the app homepage's navigation pane.

Start/Stop

Set collection times and restrict entry mode.

Collection Time

Start Time

End Time

View Form Before Start Time

Submission Mode

Set submission limits: single, multiple, or periodic.

Multiple

Form can be submitted multiple times, each creating a new record.

View History

Enable to choose the view page to jump to.

View-private

Table 4-26 Parameters

Parameter	Description
Navigation Pane	Once enabled, you can access the filling page from the application homepage's navigation menu.

Issue 01 (2025-08-21)

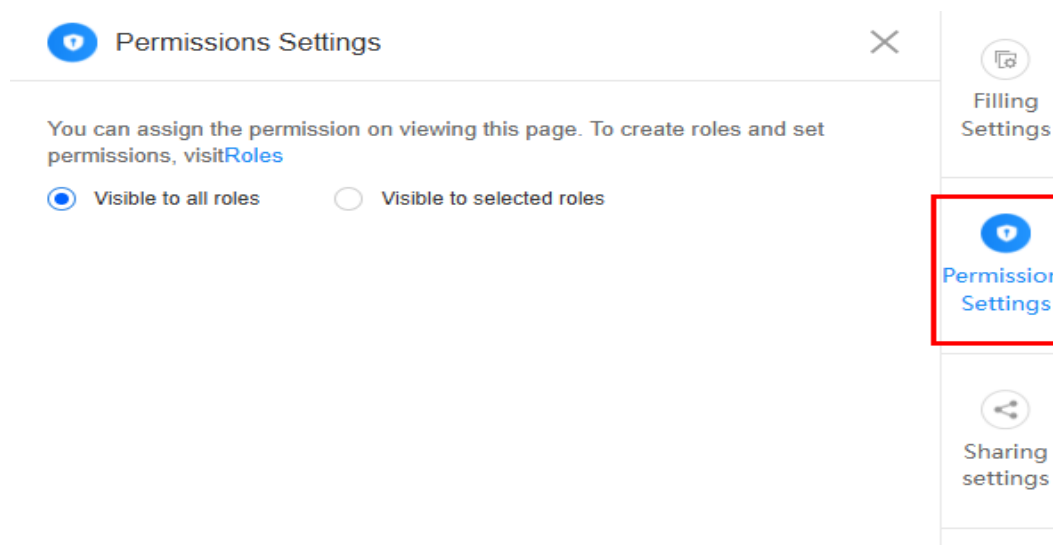
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288

Parameter	Description
Start/Stop	<p>Once enabled, you can set the data collection time and restrict the entry mode.</p> <ul style="list-style-type: none"> • Start Time: Set the time when data can be submitted on the data entry page. If the start time is not set, the data takes effect immediately by default. • End Time: Set the end time when the data submission is stopped on the data entry page. If the end time is not set, the page can be operated continuously by default. • Submission Mode: Specify the number of submission times on the filling page. For example, data cannot be submitted repeatedly or data needs to be submitted periodically in a specified period. <ul style="list-style-type: none"> – Single: Form can be submitted once or edited later, but no new records allowed. When you set a single entry, you can modify the original submission record before the deadline. – Multiple: Forms can be submitted multiple times. Each submission creates a new record. – Periodic: Forms can be submitted once per set period, such as daily check-ins. When Periodic is selected, you can specify either the daily start time or the repetition period. <p>Set daily start time: Set the daily time period when forms can be submitted. Forms can only be submitted during this period.</p> <p>Set repeat cycle: Set the repetition period. If Day is selected, the period starts from 00:00. If Hour is selected, the period starts from the Start Time.</p>
View History	Once this function is enabled, you can choose the view page to jump to.

Step 7 Click **Permission Settings** on the right to choose who can see this page. You can let everyone view it or pick specific roles.

Figure 4-368 Setting permissions



Step 8 Click **Share Settings** on the right to set the sharing mode and theme background.

Figure 4-369 Sharing settings

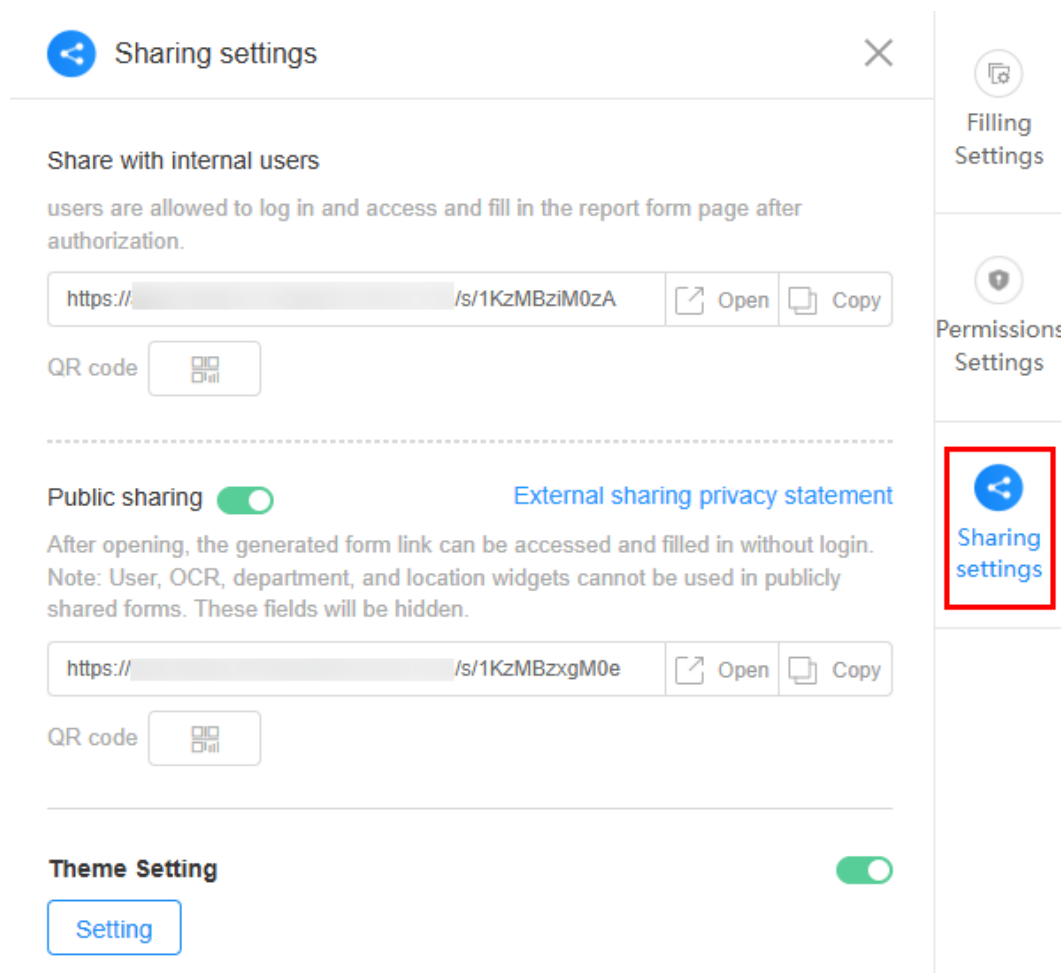


Table 4-27 Parameters for sharing settings

Parameter	Description
Internal Sharing	Share the form with internal users. When this is enabled, internal users can log in to the system and fill in the form. Click Generate Poster in the QR code to create a poster for this form. For details, see Generating a Poster from a Form .
Public	Share the form with external users. Anonymous users can access and fill in the form without login. Click Generate Poster in the QR code to create a poster for this form. For details, see Generating a Poster from a Form .
Theme	Set the theme background of the form filling page. Once enabled, click the button to set the background. On the displayed page, select a background theme and click the confirm button. If you do not want to show the background when opening this form on a mobile device, deselect Mobile . This option is selected by default.

----End

4.12 Setting Anonymous Form Filling

Use privacy settings to hide who made the survey, so it's anonymous.

Procedure



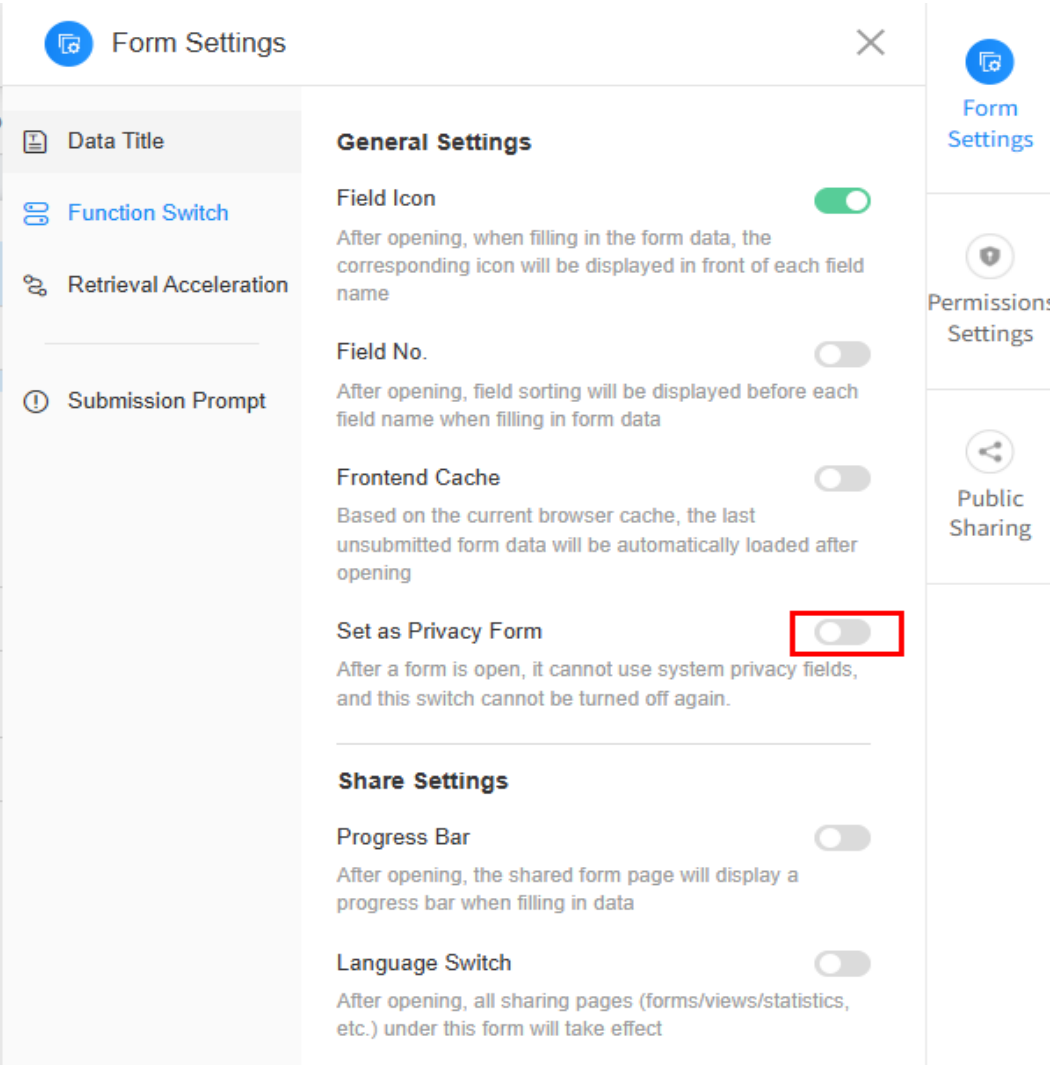
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click  on the right of the form name to enter the form design page.
For example, in the epidemic management information collection application, click  on the right of the form name. The form design page is displayed.
- Step 4** Click **Form Settings** on the right of the page. Click **Function Switch** and enable **Set as Privacy Form**.

Figure 4-370 Enabling Set as Privacy Form



- Step 5**
In the displayed dialog box, click the confirm button.
- Once a form is set to private, you cannot undo it.**
- Step 6**
Go back to the form design page, share the form, and submit the survey. If the creator's information does not show up in the results, the setting is successful.
- End

4.13 Managing Forms on PCs

Creating a Form Group

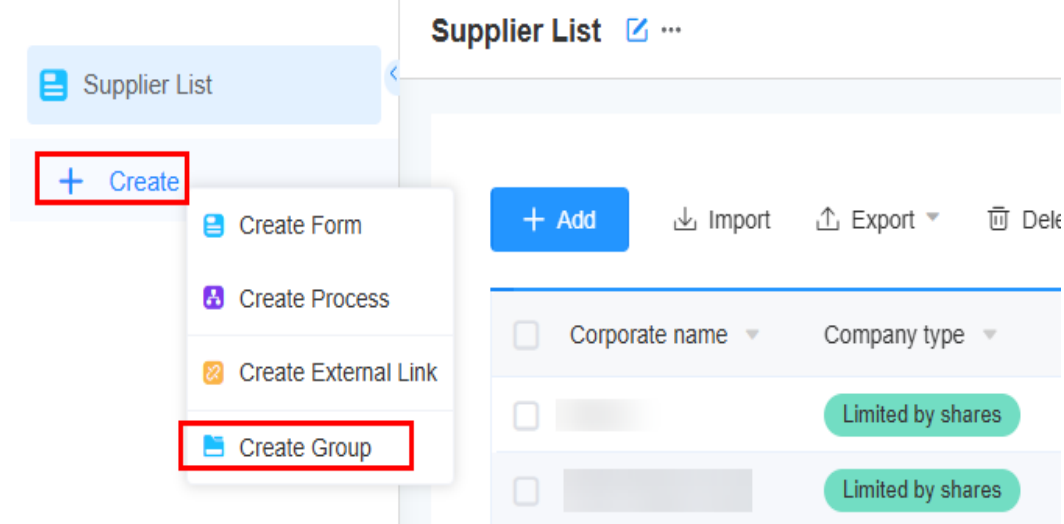
If there are too many forms in an application, you can create groups to manage and view the forms.

- Step 1**
Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 In the navigation pane, choose **Create > Create Group**.

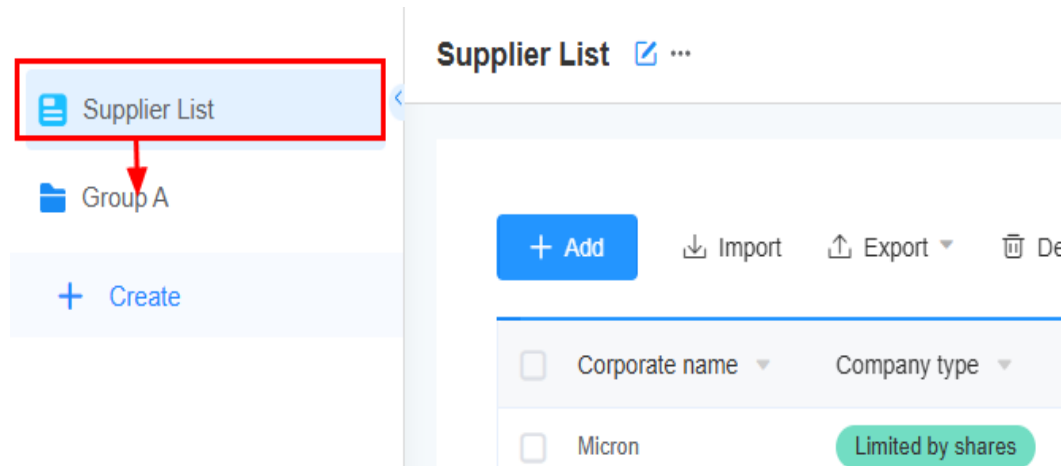
Figure 4-371 Creating a group



Step 4 Enter a group name and click the confirm button.

Drag a form to the group.

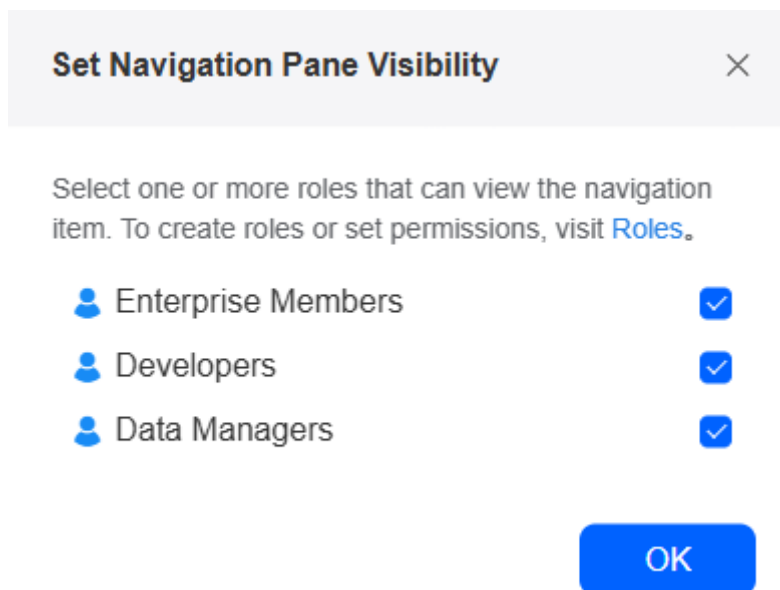
Figure 4-372 Dragging a form to the group



Step 5 Click ... next to a group and perform the following operations:

- **Change Name:** Change the group name.
- **Set Visibility:** Select roles. Only users with those roles can see the navigation item.

Figure 4-373 Setting the visibility permission



- **Delete:** Delete the group. Empty the group first, then delete it.

----End

Modifying a Form

After creating a form, you can change its content, like updating the logic or data structure.


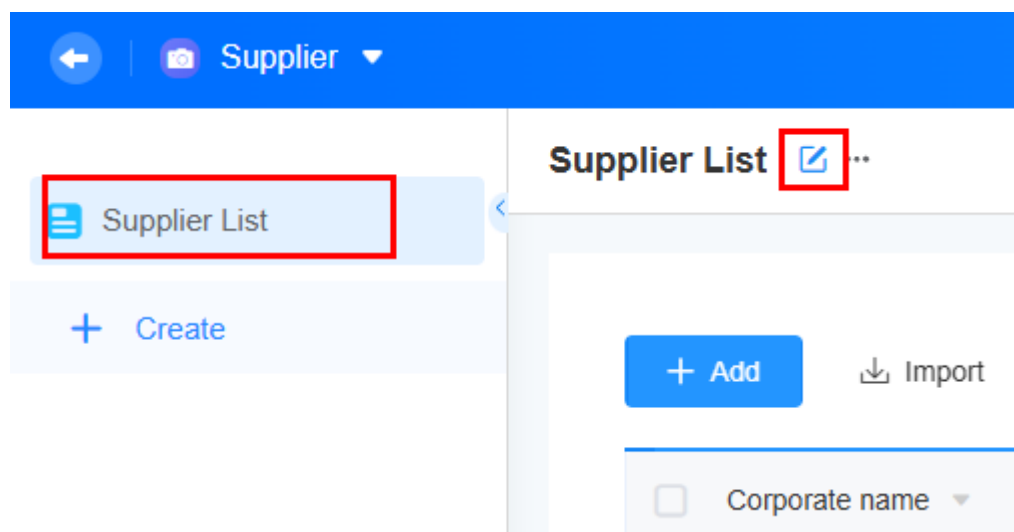
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the displayed page, select the form to be edited and click .

Figure 4-374 Entry for editing a form



Step 4 See [Creating a Form](#) to modify the form.

----End

Modifying the Form Name and Icon

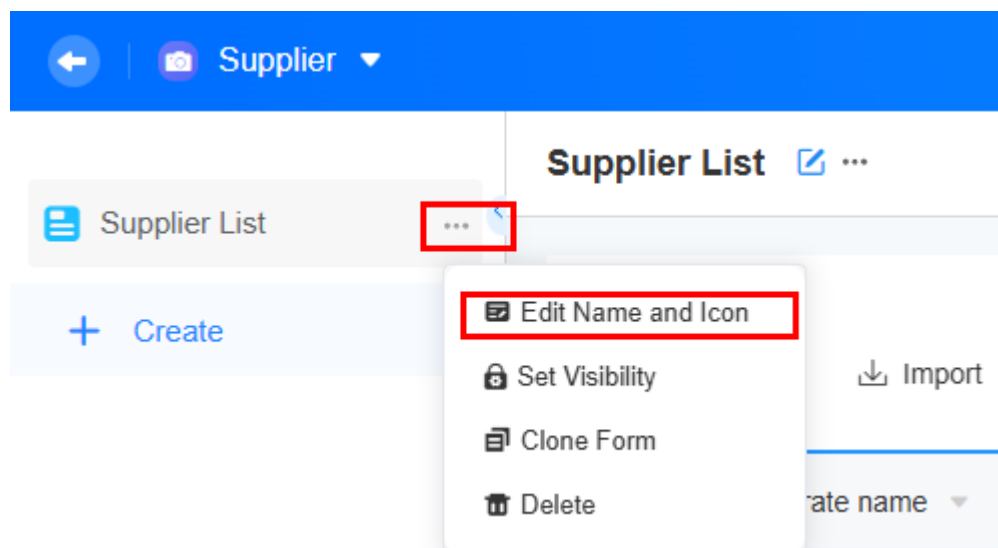
You can change the form name. For example, if the form's purpose changes, update the name to help users understand it better.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

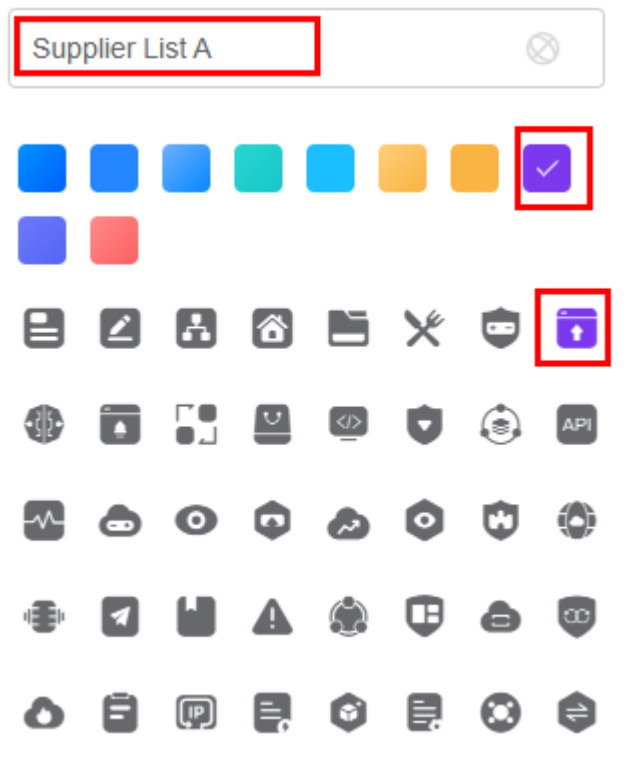
Step 3 Click ... of the target form and choose **Edit Name and Icon**.

Figure 4-375 Choosing Edit Name and Icon



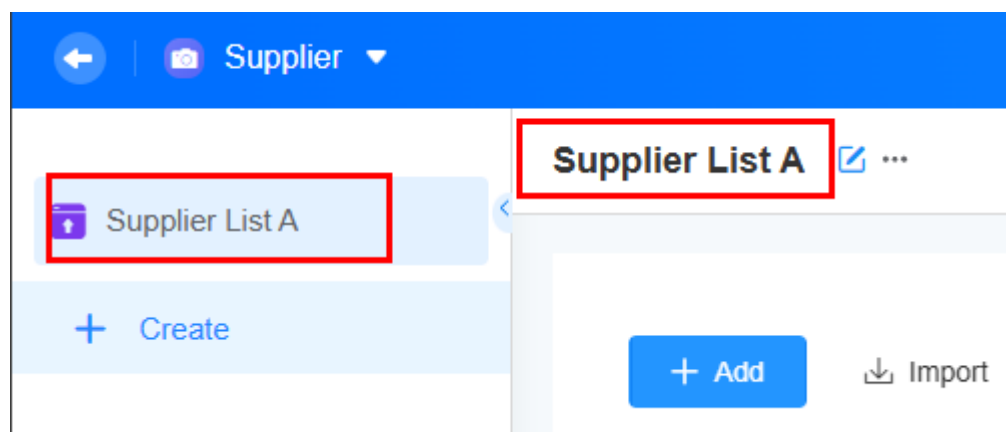
Step 4 Modify the form name, icon, and icon background color as required.

Figure 4-376 Modifying the name, icon, and icon background color



After the modification, return to the application editing page. The form name, icon, and icon background color have been changed.

Figure 4-377 Viewing the modified name and icon



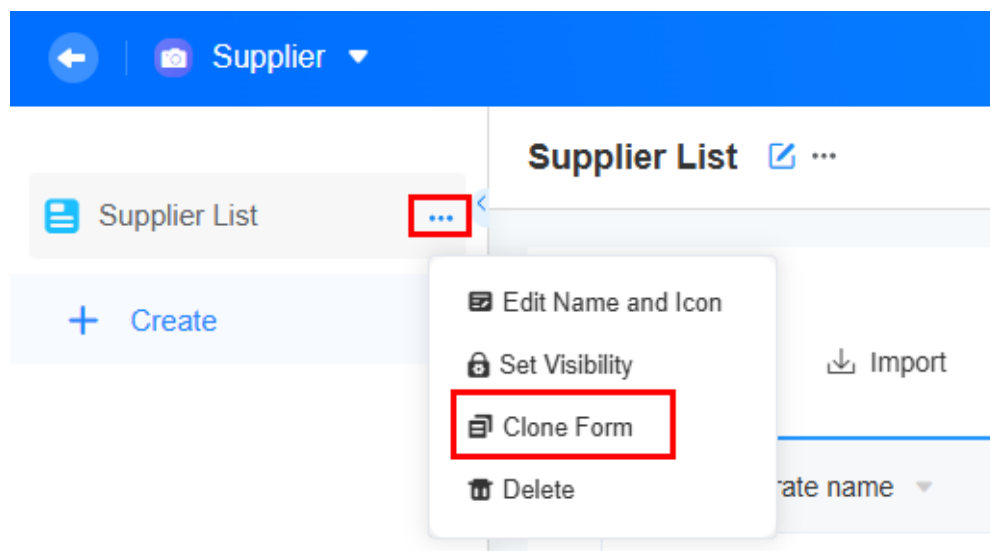
----End

Cloning a Form

If the service scenarios are similar, you can clone a form to create a new one quickly. When you clone a form, only the metadata structure is copied, not the instance data.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click ... of the target form and choose **Clone Form**.

Figure 4-378 Cloning a form



- Step 4** Enter a name and click **OK**.

After cloning the form, the new form shows up in the left directory. If the application has a form filling page, the form filling page will also be cloned.

Figure 4-379 Setting the name of the cloned form

Clone Form“Supplier List” ×

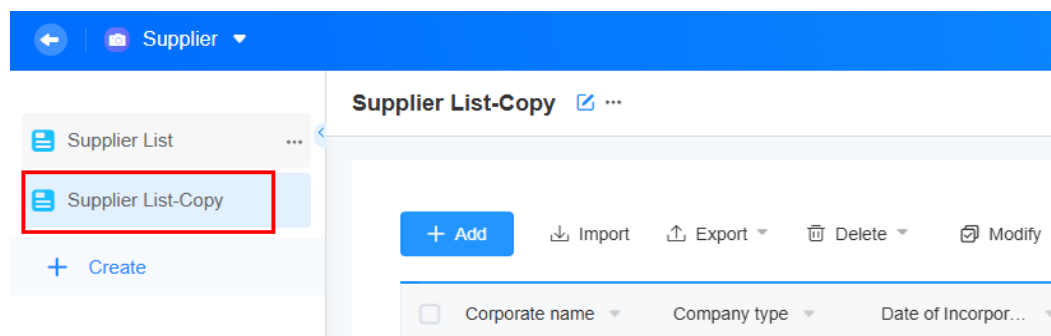
Copy the form and all its configurations to the current application. Data in the form will not be copied.
Subtable fields are not support to copy now. You should rebuild these fields after copy.

* Form Name

Supplier List-Copy

Cancel OK

Figure 4-380 Viewing the cloned form



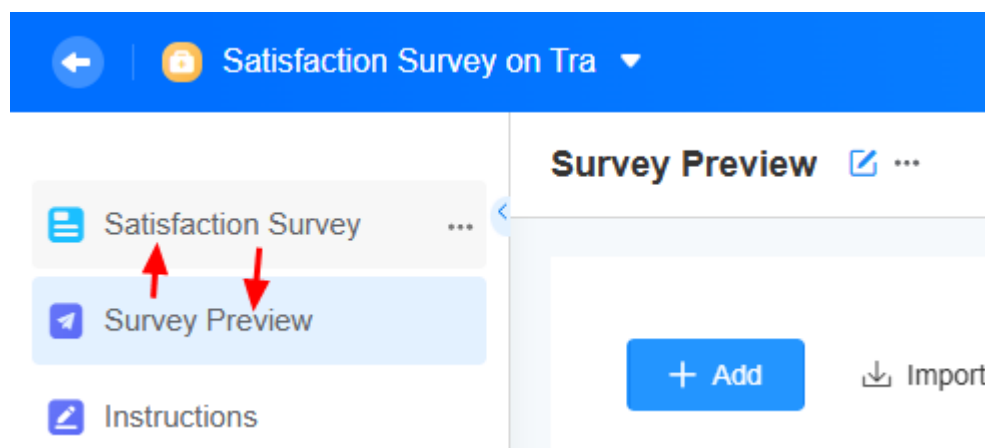
----End

Sorting Forms

On the form development page, drag forms up or down to sort them.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Drag forms up or down to sort them.

Figure 4-381 Sorting forms



----End

Deleting Form Data

You can delete some data with filters or all data. This operation cannot be undone. This includes subtables and attachments. Anything linked to the deleted data will be affected.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.

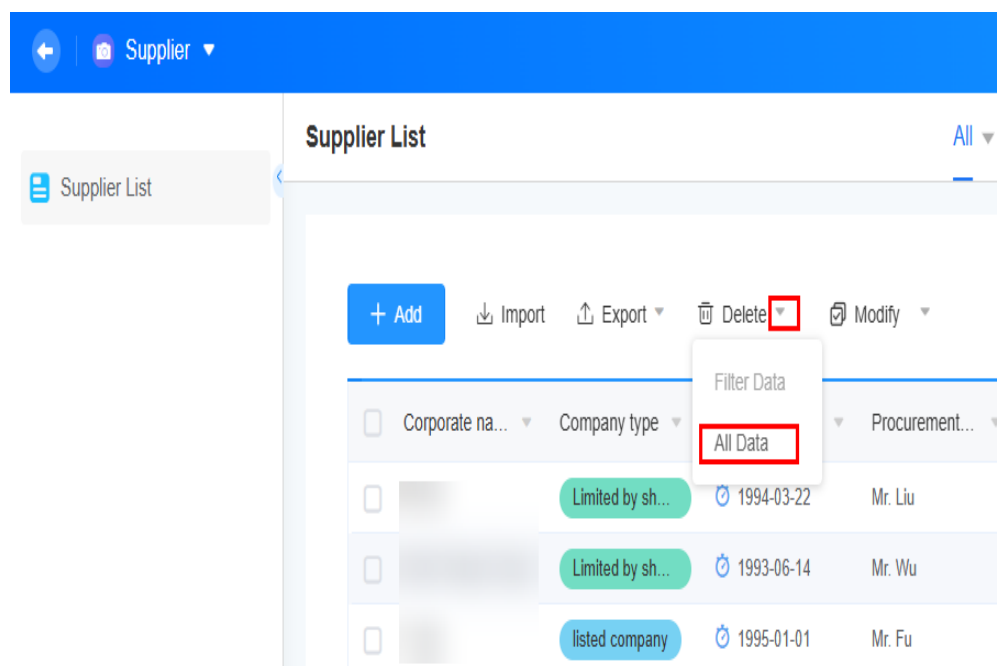
Step 3 Select a form on the left.

Step 4 Click ▼ next to **Delete** and choose to delete all or filtered data.

All data: If the form data is old or has sensitive information, you can delete it all at once. You can delete up to 5,000 records at a time.

1. Click ▼ next to **Delete** and choose to delete all data. The data deletion page is displayed.

Figure 4-382 Selecting all data

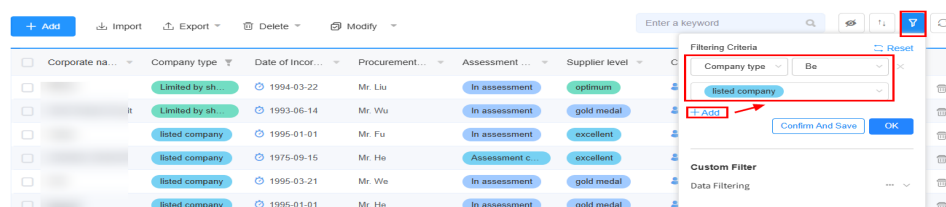


2. In the displayed dialog box, confirm the deletion.

Filter data: Create a filter to find the data you want and delete it.

1. See [Figure 4-383](#) to set filter criteria. You can add more criteria. Use **and** or **or** to combine them.

Figure 4-383 Setting filter criteria



2. After setting the filter criteria, save the settings and name the filter.

Figure 4-384 Saving a filter

Save Filter

Name

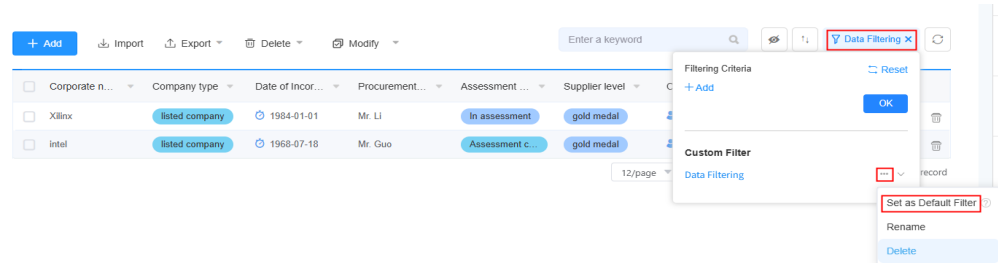
Data Filtering

Cancel

Confirm

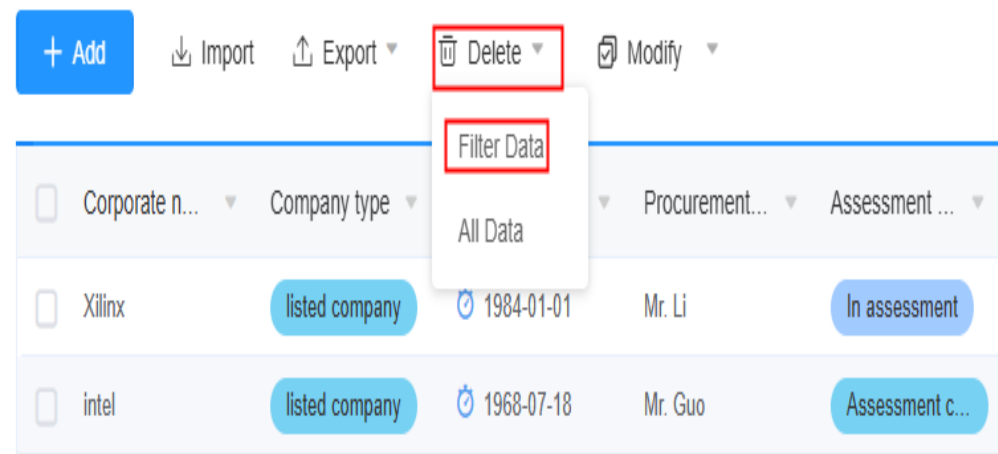
3. (Optional) Click *** next to the filter and set it as the default filter.

Figure 4-385 Setting the filter as the default filter



4. Click ▼ next to **Delete** and choose to delete the filtered data. The data deletion page is displayed.

Figure 4-386 Deleting filtered data



5. In the displayed dialog box, confirm the deletion.

----End

Exporting Form Data

After collecting data, you can save the form data to your local PC. If the form data is abnormal, you can import the data back to the no-code workbench to fix it.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, click the target application. The application development page is displayed.

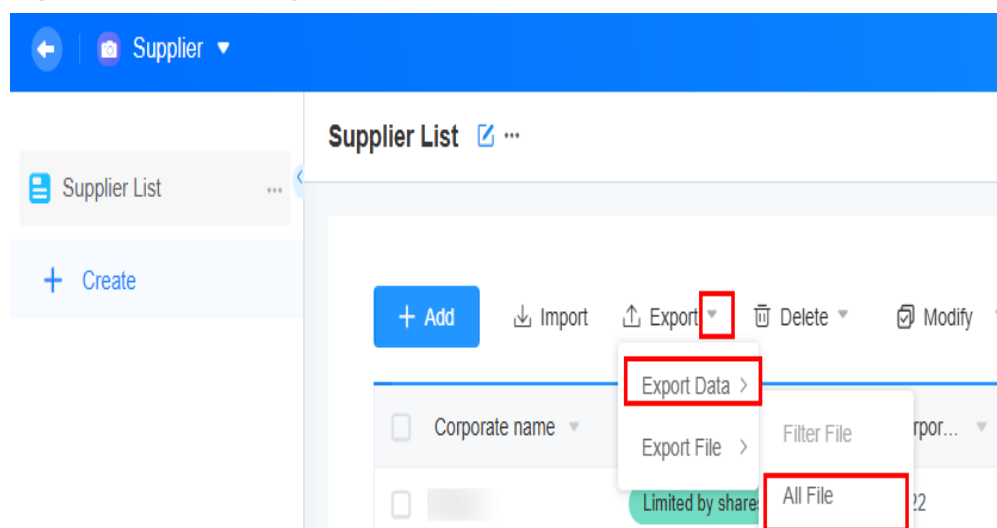
Step 3 Select a form on the left.

Step 4 Click ▼ next to **Export** and choose **All Data** or **Filter Data**.

Exporting all data: Export all data on the form filling page to the local PC.

1. Click ▼ next to **Export** and choose **Export Data** > **All Data**.

Figure 4-387 Selecting all data



2. On the data export page, select the fields to be exported and click **Confirm**.

Figure 4-388 Selecting fields to export

Data Export

Please select the fields to export

Search field name

Field Name

☐

Record ID

☒

Corporate name

☒

Company type

☒

Date of Incorporation

☒

Procurement Specialist

☒

Assessment status

☒

Supplier level

☒

Creator

☒

Created On

Cancel

Confirm

Filtering data: Create a filter to find the data you want and export it.

1. See [Figure 4-389](#) to set filter criteria. You can add more criteria. Use **and** or **or** to combine them.

Figure 4-389 Setting filter criteria

+ Add

Import

Export

Delete

Modify

Enter a keyword

Reset

<input type="checkbox"/>	Corporate name	Company type	Date of incorpor...	Procurement Sp...	Assessment status	Supplier level	Creator
<input type="checkbox"/>		Limited by shares	1994-03-22	Mr. Liu	In assessment	optimum	
<input type="checkbox"/>		Limited by shares	1993-06-14	Mr. Wu	In assessment	gold medal	
<input type="checkbox"/>		Limited by shares	1995-01-01	Mr. Fu	In assessment	excellent	
<input type="checkbox"/>		Limited by shares	1975-09-15	Mr. He	Assessment com...	excellent	

Filtering Criteria

Company type

Be

listed company

+ Add

Confirm And Save

OK

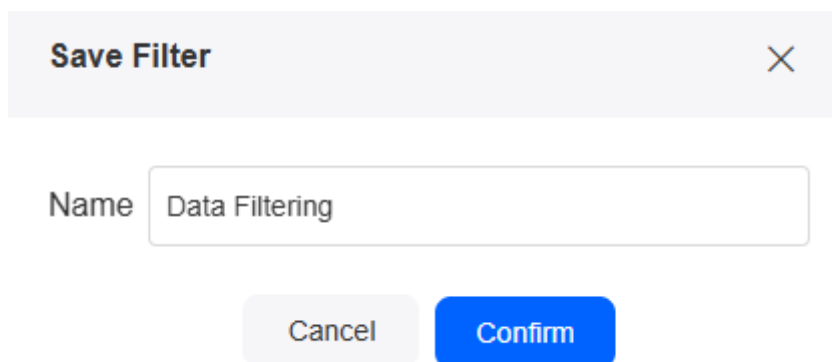
2. After setting the filter criteria, save the settings and name the filter.

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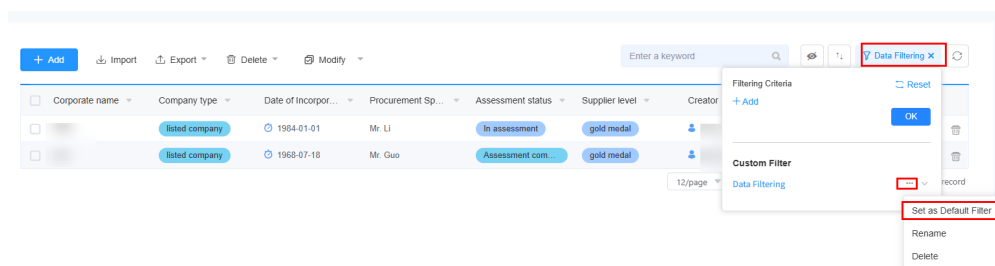
302

Figure 4-390 Saving a filter



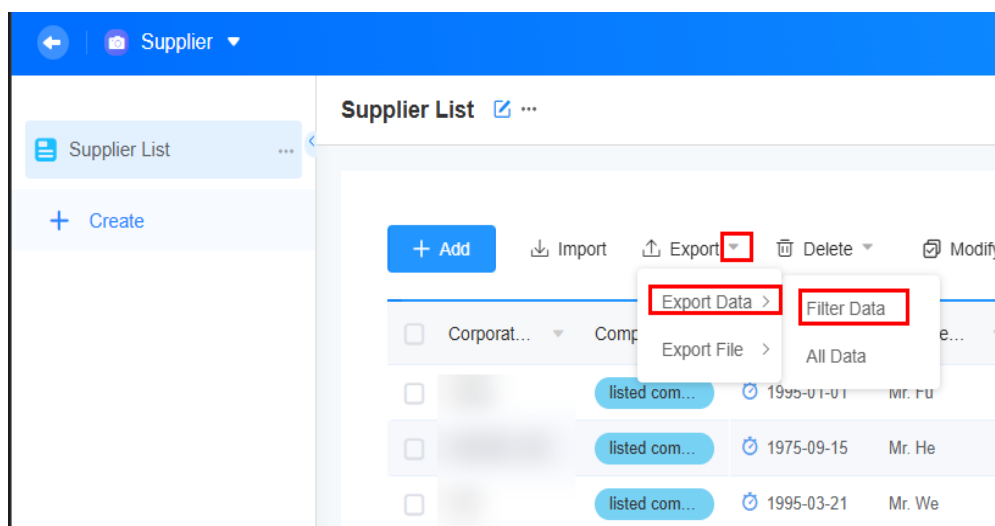
3. (Optional) Click ******* next to the filter and set it as the default filter.

Figure 4-391 Setting the filter as the default filter



4. Click **▼** next to **Export** and choose **Export Data > Filter Data**.

Figure 4-392 Exporting filtered data



5. In the displayed dialog box, select the fields to be exported and confirm the export.

Figure 4-393 Selecting fields to export

The screenshot shows a 'Data Export' dialog box with a close button (X) in the top right corner. Below the title bar, there is a prompt 'Please select the fields to export' and a search bar labeled 'Search field name' with a magnifying glass icon. A list of fields is displayed below, each with a checkbox. The following fields are checked and highlighted with a red rectangular box: 'Corporate name', 'Company type', 'Date of Incorporation', 'Procurement Specialist', 'Assessment status', 'Supplier level', 'Supplier Registration Certificate', and 'Supplier Level Certificate'. Other fields in the list include 'Field Name' (with a minus icon), 'Record ID', 'Creator', and 'Created On', all of which are unchecked.

At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Confirm'.

----End

Exporting Files of Attachment Fields in a Form

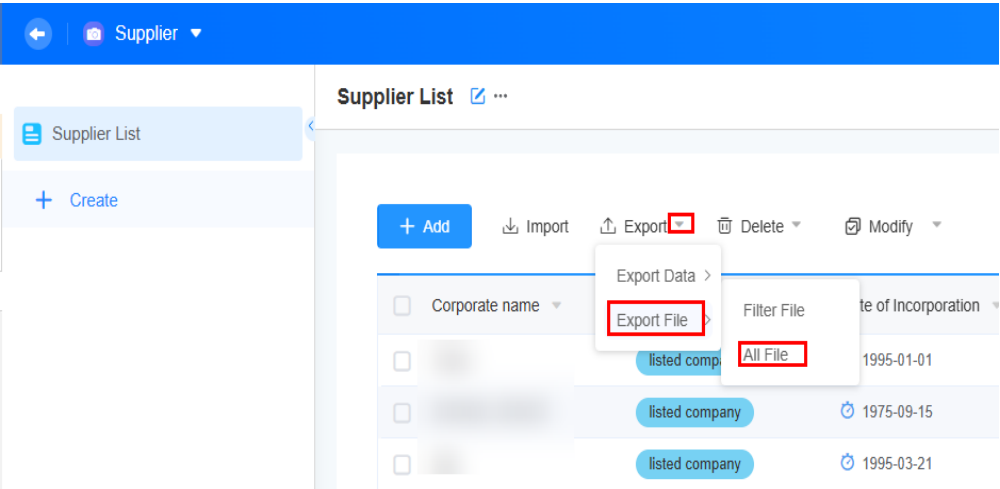
Download attachment fields from records in batches, compress them into a .zip file, and ensure the total size does not exceed 500 MB. If the size exceeds 500 MB, export the files in smaller batches.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** Select a form on the left.
- Step 4** Click ▼ next to **Export** and choose to export all files or filtered files.

Exporting all files: Export all files in the attachment field. The exported file will be in ZIP format with a maximum size of 500 MB. If the size exceeds 500 MB, export the file in batches.

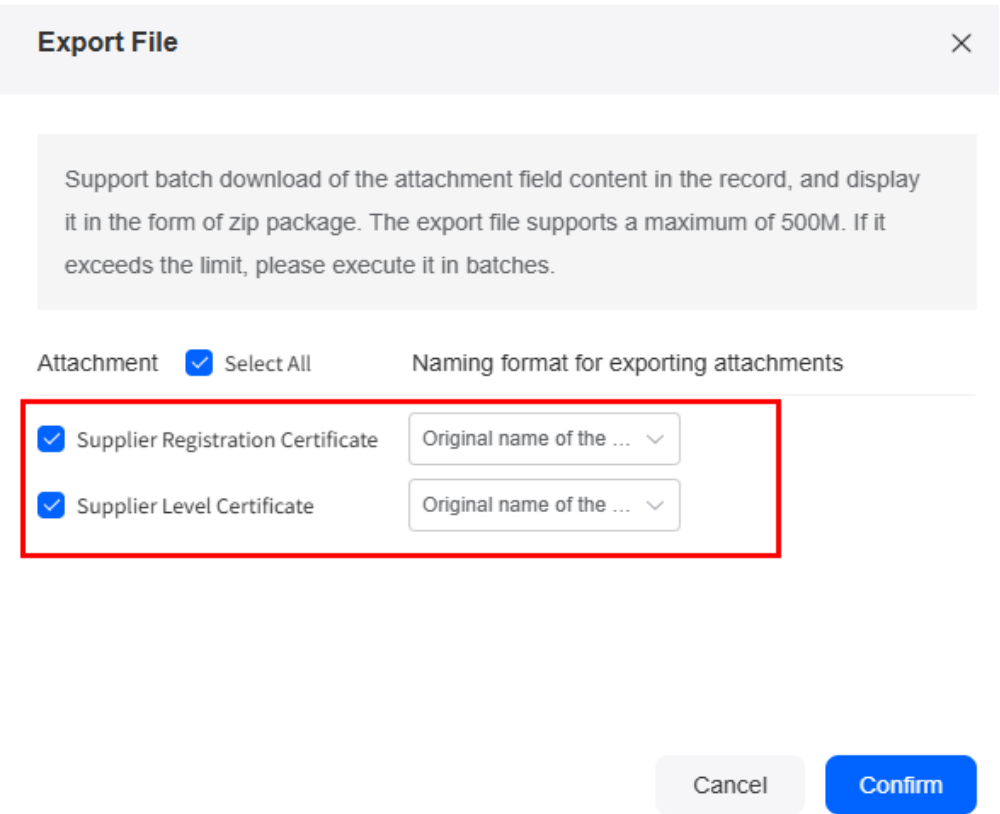
1. Click ▾ next to **Export** and choose to export all files.

Figure 4-394 Selecting all files



2. On the **Export File** page, select the attachment fields to be exported and click **Confirm**.

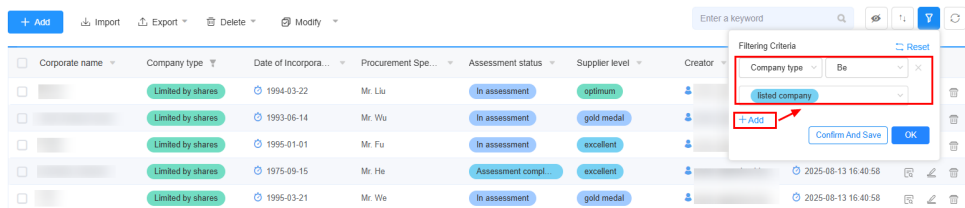
Figure 4-395 Setting the fields to export



Exporting files from the filtered attachment fields: Create a filter to export files that meet the criteria.

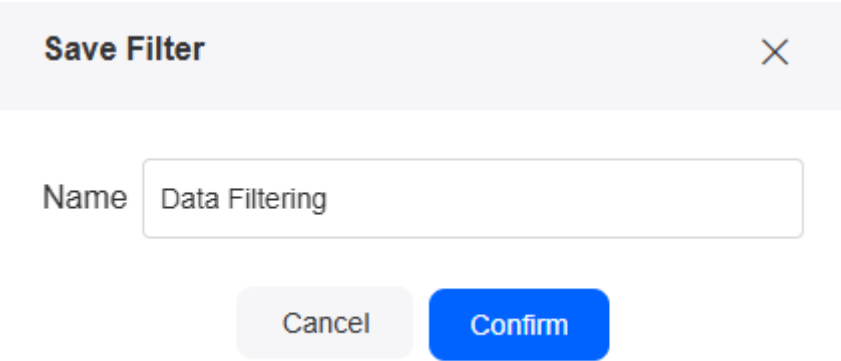
1. See [Figure 4-396](#) to set filter criteria. You can add more criteria. Use **and** or **or** to combine them.

Figure 4-396 Setting filter criteria



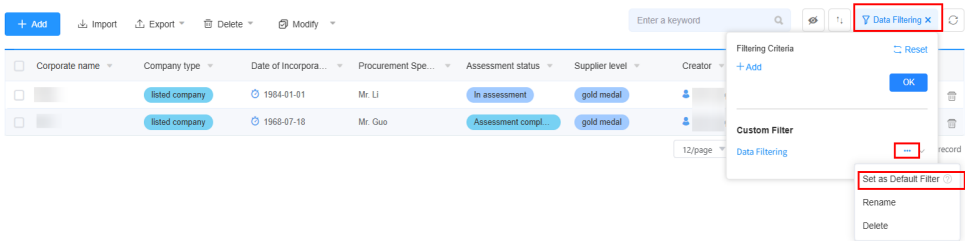
2. After setting the filter criteria, save the settings and name the filter.

Figure 4-397 Saving a filter



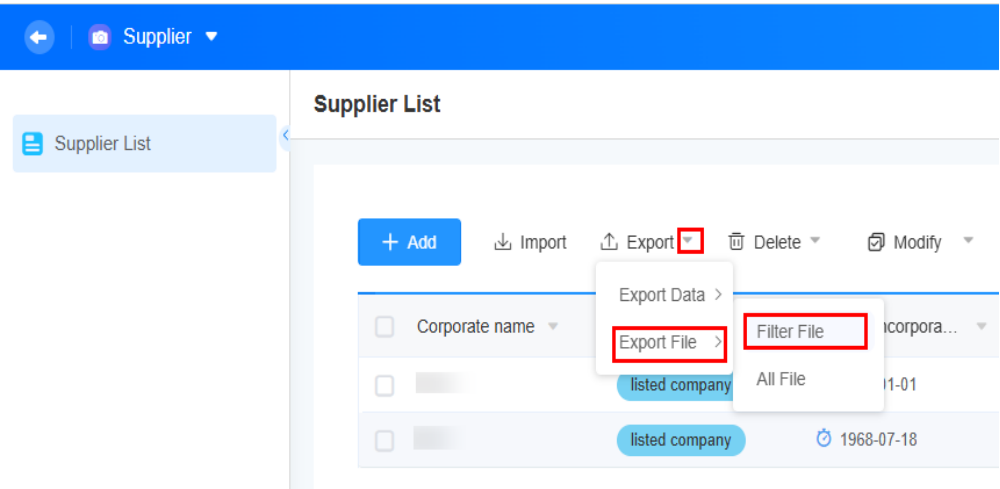
3. (Optional) Click *** next to the filter and set it as the default filter.

Figure 4-398 Setting the filter as the default filter



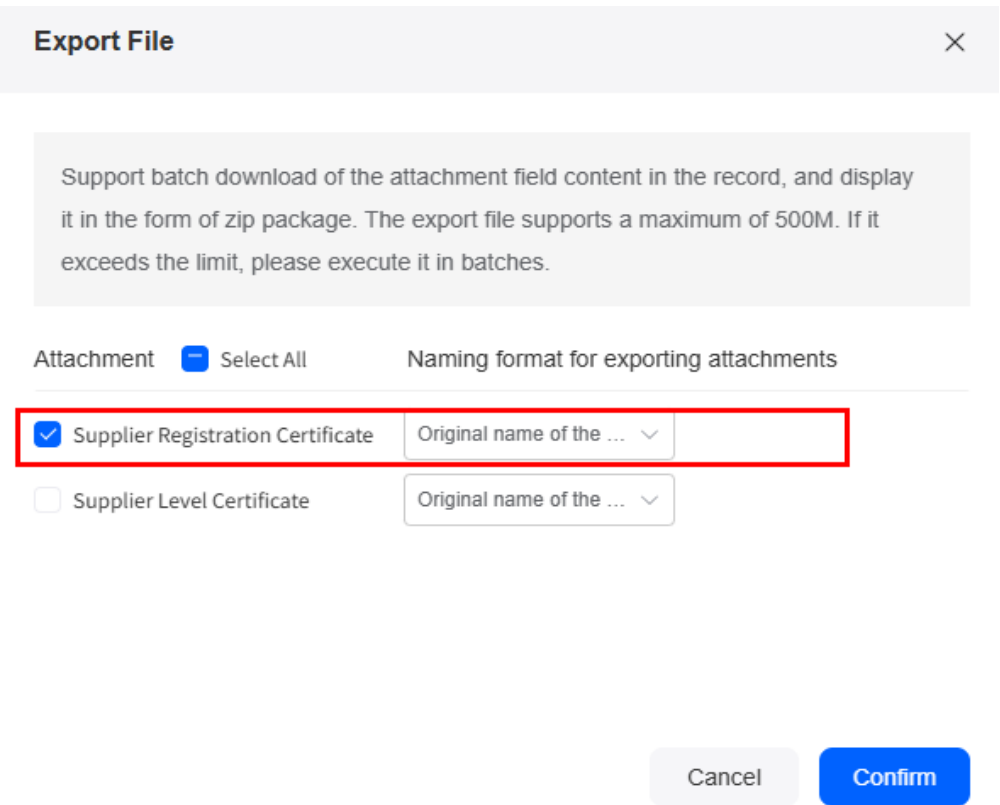
4. Click ▼ next to **Export** and choose to export the filtered files.

Figure 4-399 Exporting filtered data



5. On the **Export File** page, select the attachment fields to be exported and click **Confirm**.

Figure 4-400 Setting the fields to export



----End

Importing a Form Data File

When importing form data, follow the platform's rules to make sure the data is accurate. Here are the rules to follow:

- Use the platform's standard template to enter data. Import only the first form in XLS or XLSX format.
- If you change the table header, the import may fail.
- Each file must not exceed 10 MB.
- Each sheet can have up to 200 columns and 10,000 rows.
- These fields cannot be imported: reference, summary, attachment, formula, subtable, matrix table, text combination, privacy protection, location, electronic signature, rich text, and auto number.
- If field names are the same, choose the right match yourself.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** Click a form on the left. On the displayed page, click **Import**.
- Step 4** On the displayed dialog box, select the file to import, or drag it onto the page, then click **Next**.
- Step 5** Set up the mapping as prompted and click **Import**. The dialog box as shown in [Figure 4-402](#) is displayed. Complete the import as prompted.

Figure 4-401 Setting up the mapping

Data Import-Configure Mapping(2/2)

☐ Field Rule Verification
After opening, if the data of a certain field in the row is inconsistent with the field format, or if the required field content is empty, the data import of this row will be abandoned:
After closing, fields that do not comply with data rules will be empty. The data of other fields in this row was imported normally.
Some special scenarios do not support verification

☐ Data duplication check

Excel Table Header Field

Corporate name

Company type

Date of Incorporation

Procurement Specialist

Assessment status

Supplier level

→

→

→

→

→

→

View Field

Corporate name

Company type

Date of Incorporation

Procurement Specialist

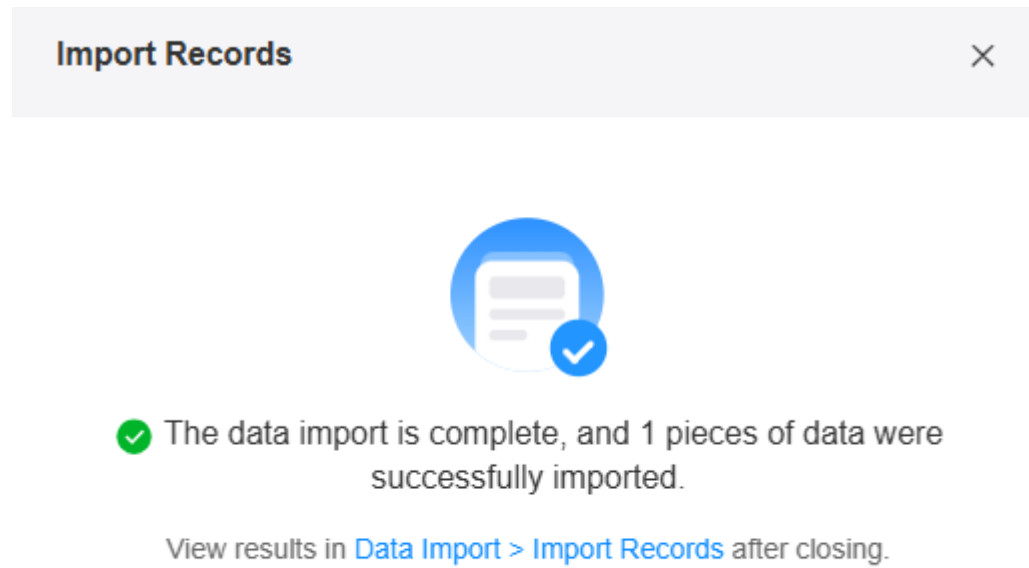
Assessment status

Supplier level

Previous

Import

Figure 4-402 Data imported



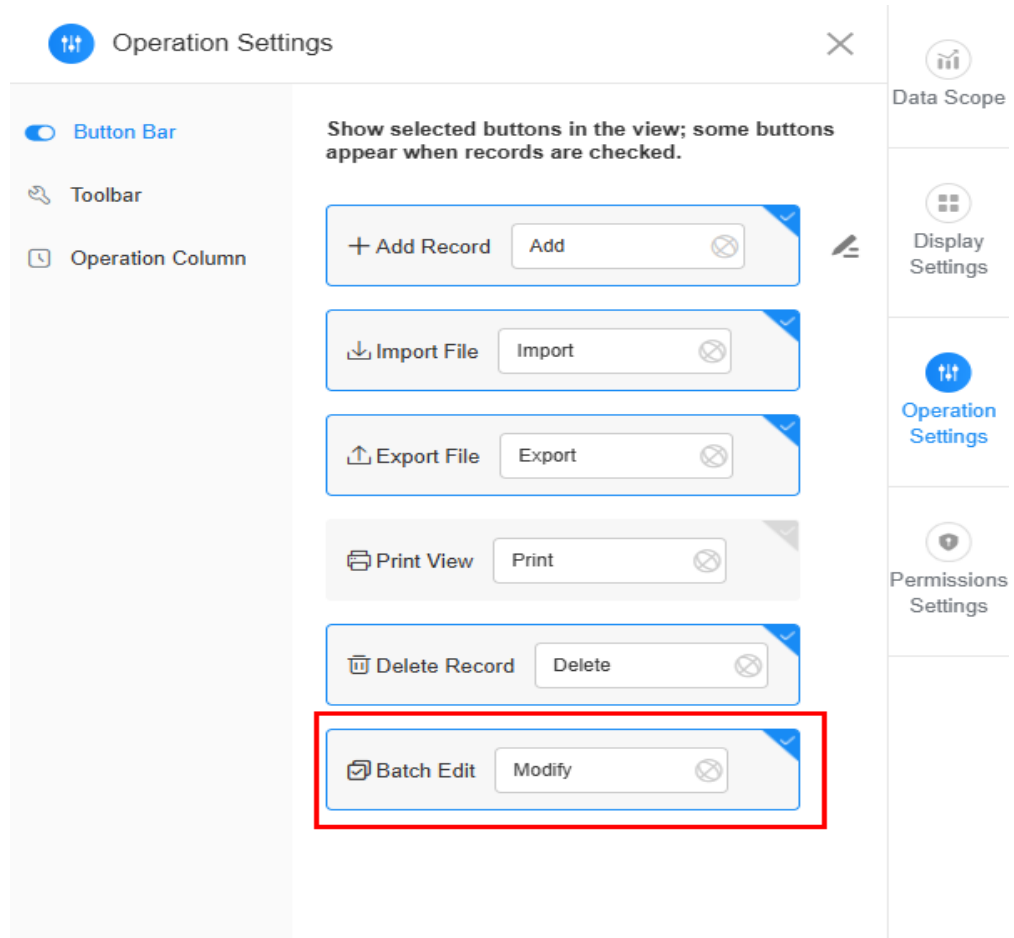
----End

Modifying Form Data

You can modify some data using filters or all data. **Check if the batch modification button is enabled in the form view. Here are the rules for modifying data:**

- In the form view, enable the batch modification button first.

Figure 4-403 Enabling the batch modification button



- Batch data changes cannot be undone.
- This function is unavailable to fields selected as **Unique**.
- Modify up to 5,000 records at a time.
- These fields cannot be modified in batches: associated record, reference, OCR, summary, attachment, formula, subtable, matrix table, text combination, privacy protection, location, and auto number.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, click the target application. The application development page is displayed.

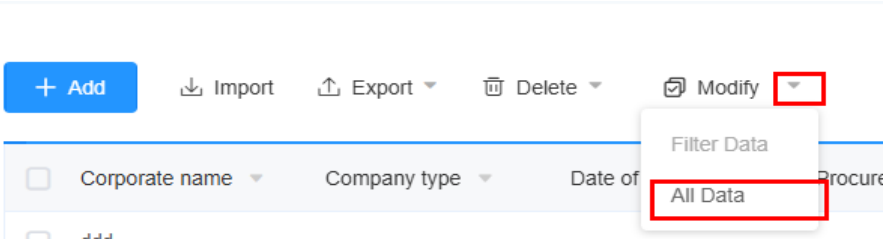
Step 3 Select a form on the left.

Step 4 Click ▼ next to **Modify** and choose to modify all data or filtered data.

Modifying all data: Select the fields to be modified and replace the field values with new values or clear the field content.

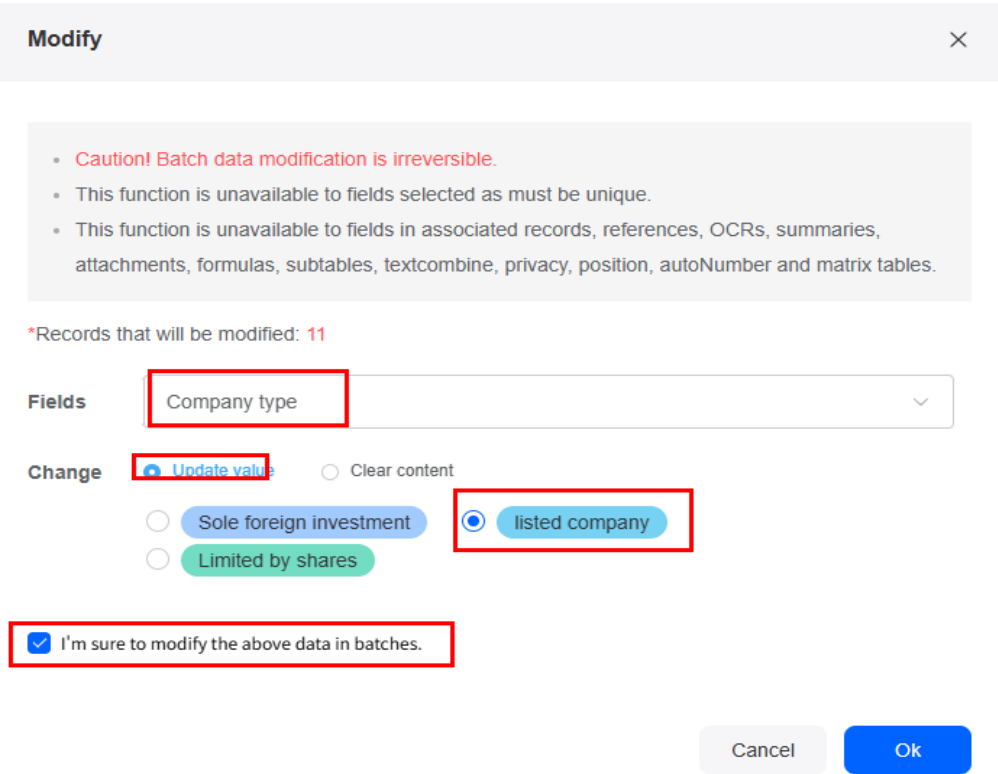
1. Click ▼ next to **Modify** and choose to modify all data.

Figure 4-404 Modifying all data



2. On the page for batch modification, select the fields to be modified and the modified content, and click the confirm button.

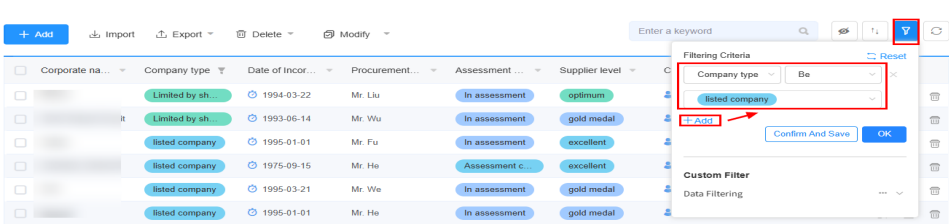
Figure 4-405 Modifying data in batches



Modifying the values of fields after filtering: Create a filter to filter data that meets the criteria and modify the field values.

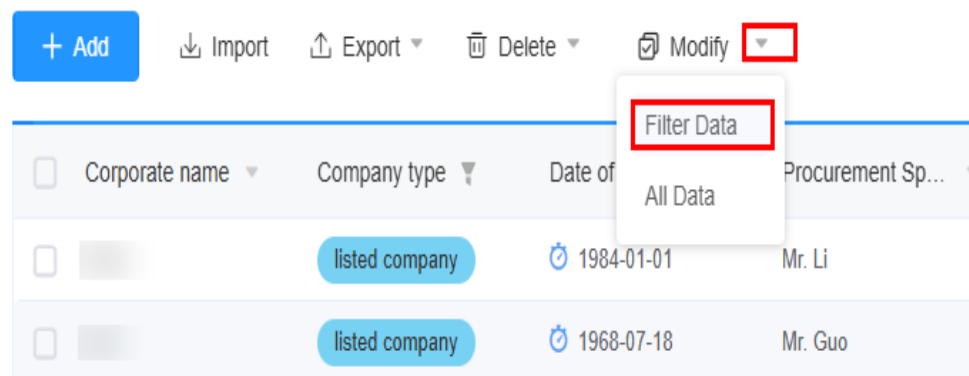
1. See [Figure 4-406](#) to set filter criteria. You can add more criteria. Use **and** or **or** to combine them.

Figure 4-406 Setting filter criteria



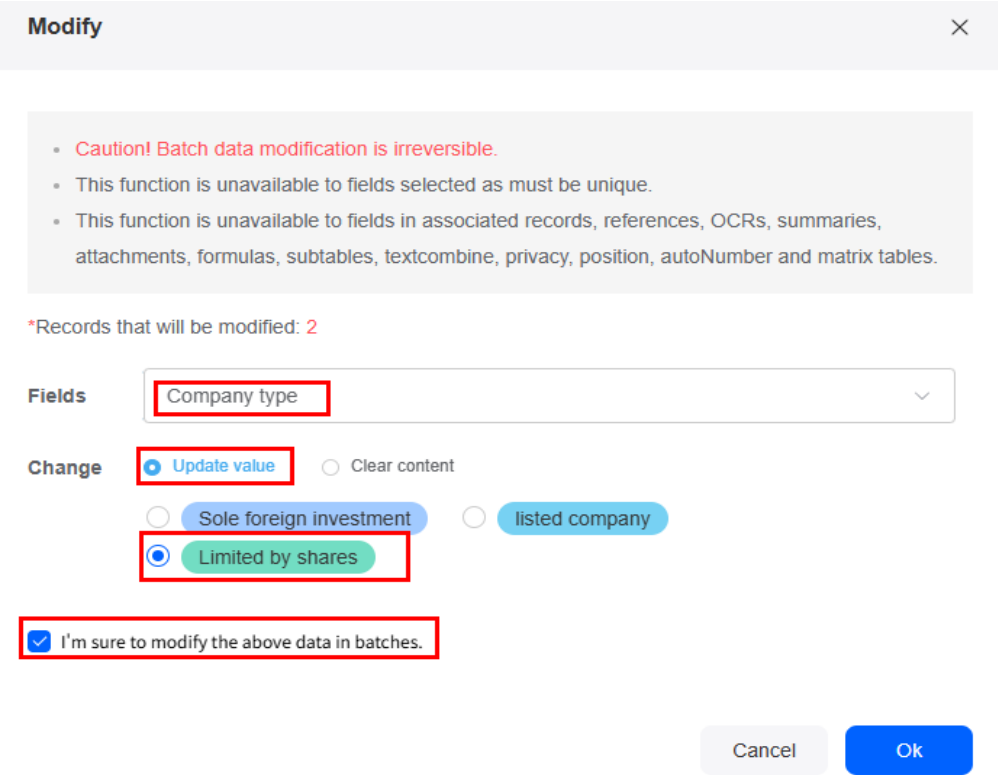
2. Click ▾ next to **Modify** and choose to modify the filtered data.

Figure 4-407 Modifying the filtered data



3. On the batch modification page, select the fields to be modified and the modified content, and click the confirm button.

Figure 4-408 Modifying the filtered data



After the modification, you can view that the company type is changed to **Limited by shares**.

Figure 4-409 Viewing the modified data

+ Add

Import

Export

Delete

Modify

<input type="checkbox"/>	Corporate name	Company type	Date of Incorpor...	Procurement Sp...	Assessment status	Supplier level
<input type="checkbox"/>		Limited by shares	1994-03-22	Mr. Liu	In assessment	optimum
<input type="checkbox"/>		Limited by shares	1993-06-14	Mr. Wu	In assessment	gold medal

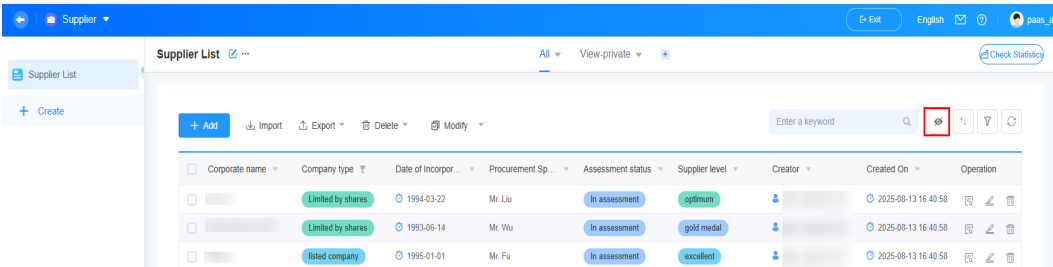
----End

Hiding Columns

After a form is created, you can hide some columns. For example, you can hide columns that contain customer privacy information, such as phone numbers and ID card information.

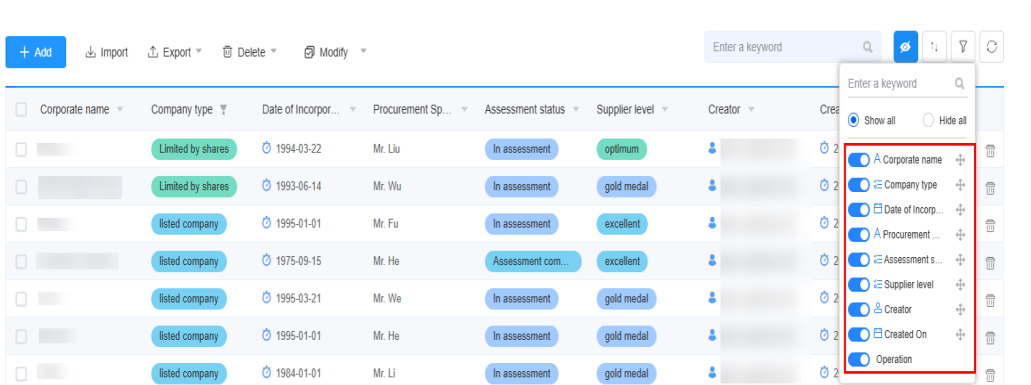
- Step 1
- Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2
- In **All Apps**, click the target application. The application development page is displayed.
- Step 3
- On the form page, click the icon to hide columns.

Figure 4-410 Hiding columns






- Step 4
- Hide columns as required.

Figure 4-411 Hiding columns



- **Show all:** Display all columns in the form.

- **Hide all:** Hide all columns in the form.
- Click  to hide the column in the form. To display a hidden column, click .
- Drag  to adjust the position of a column in the form.

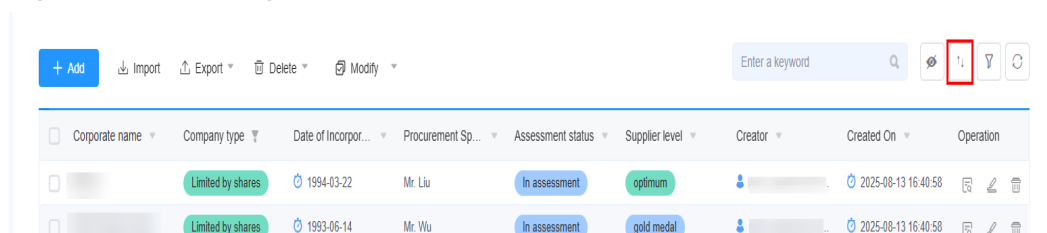
----End

Sorting Fields in a Form

After creating a form, you can sort its fields to quickly find target data, especially when dealing with large and complex data volumes.

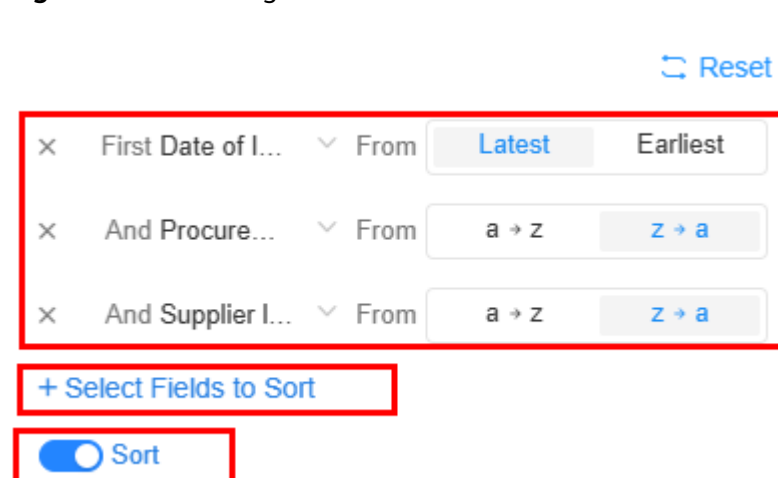
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** On the form page, click the icon to sort fields.

Figure 4-412 Sorting fields



- Step 4** Click **Select Fields to Sort**.
- Step 5** Select required fields, set sorting rules, and click the sorting button.
After the sorting rule is set, click **Reset** to reset the sorting.

Figure 4-413 Sorting fields



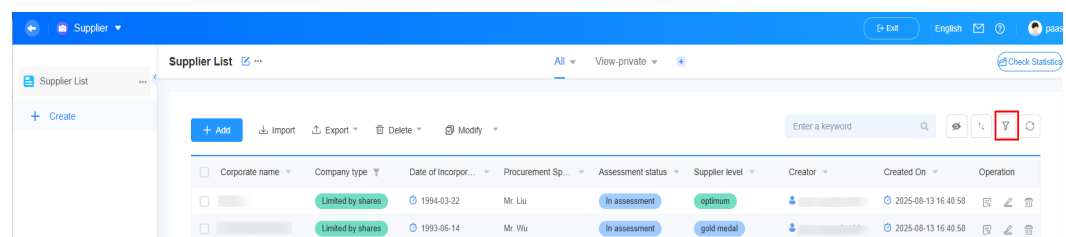
----End

Customizing a Filter

When processing form data, you can create custom filters to quickly find target data and set them as default filters. This way, only the data that meets the filter criteria will be displayed each time the form is opened.

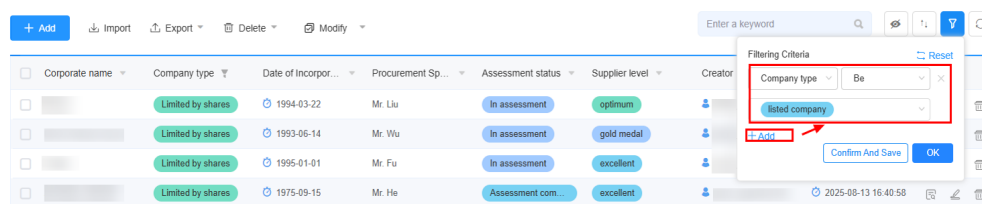
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** On the form page, click the filter icon.

Figure 4-414 Clicking the filter icon



- Step 4** Click **Add**, set filter criteria, and click the button to save the settings.

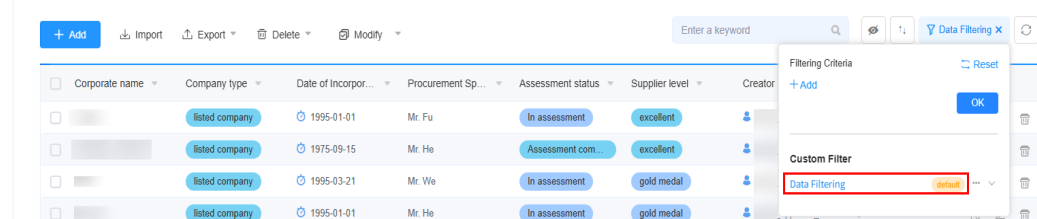
Figure 4-415 Setting filter criteria





- Step 5** On the page that is displayed, enter a filter name and click the confirm button.
- Step 6** Under **Custom Filter**, click *******, and select **Set as Default Filter**.

When the default filter is applied, only the data that meets the criteria is shown each time the form view page is opened.

Figure 4-416 Effect




- Click ******* and cancel the setting of the default filter.
- Click ******* and choose **Rename** to change the filter name.

- Click  and choose **Delete** to delete the filter.
- Click  to view, add, or modify filter criteria.

----End

Freezing Fields

Freeze columns in a form to keep them always visible during horizontal scrolling, helping users in comparing and searching for data relationships.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application.
- Step 3** On the form page, click  next to the field to be frozen and click the button to freeze it.

After the setting, the column and all preceding columns are frozen. For example, freeze the company type column so that the company type and company name columns remain visible when you scroll horizontally. See [Figure 4-418](#).

Figure 4-417 Freezing the company type column

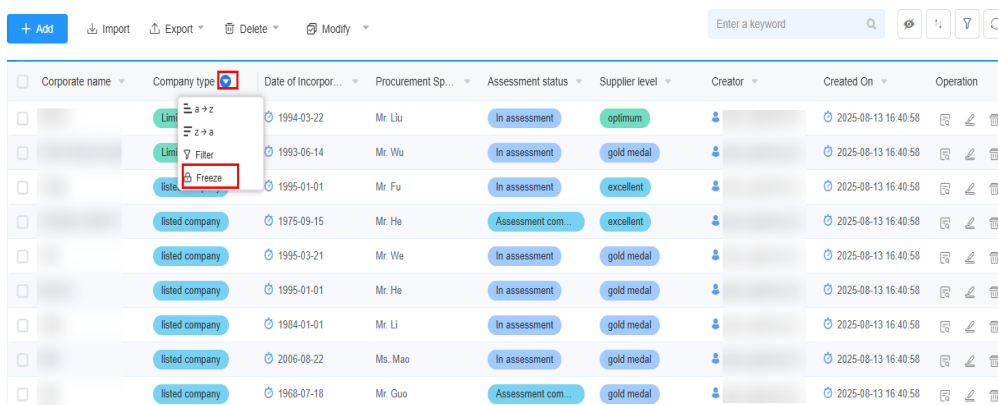
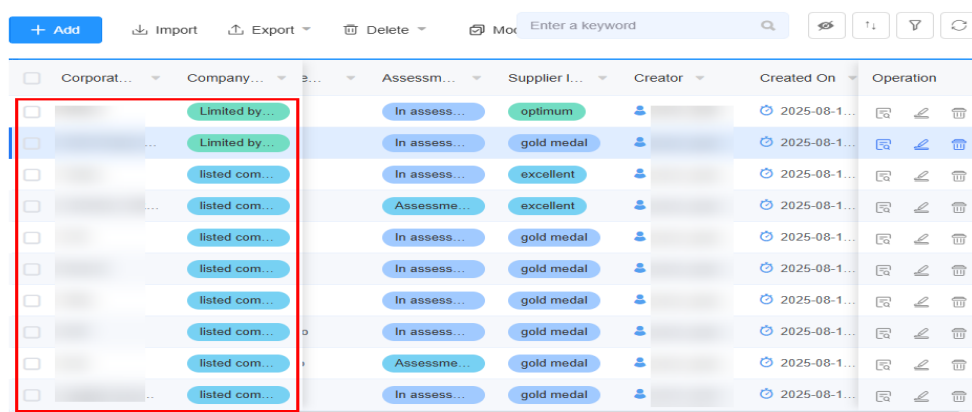


Figure 4-418 Effect



Step 4 Click ▾ next to a frozen column and click the button to unfreeze the column.

----End

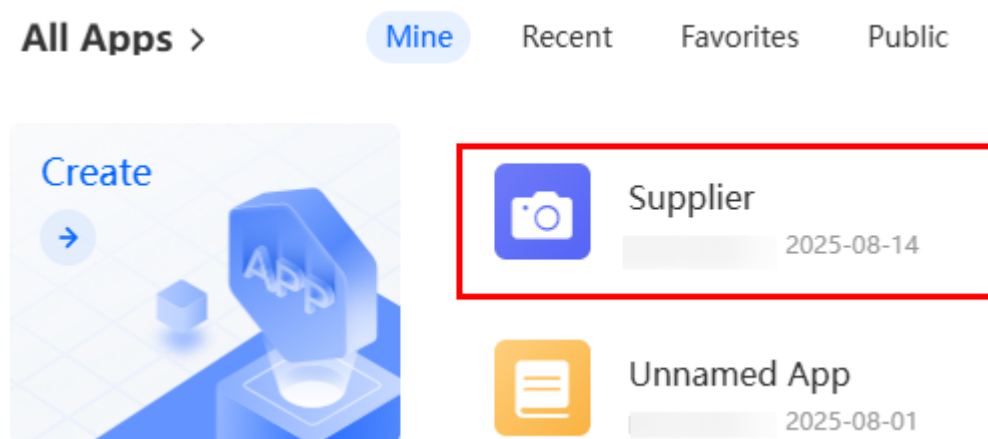
Generating a Poster from a Form

When sharing a form, you can generate a poster for the form. Exquisite posters help quickly collect data.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

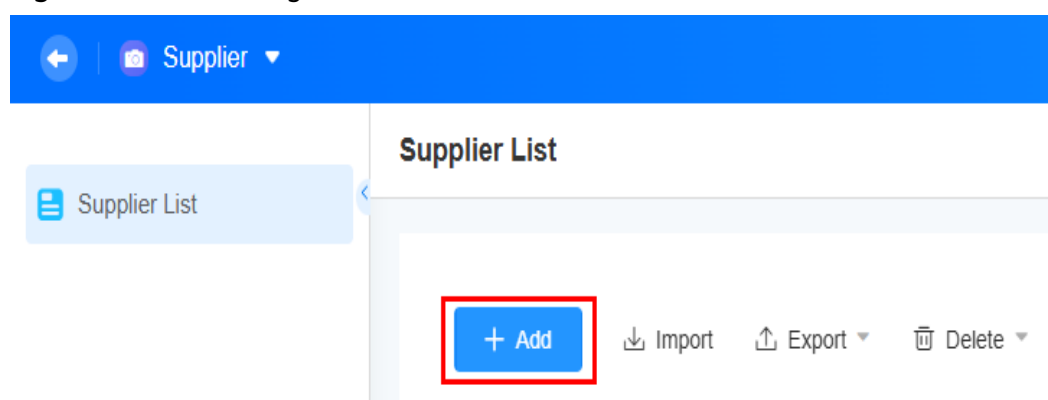
Step 2 In **All Apps**, click the target application.

Figure 4-419 Clicking the target application



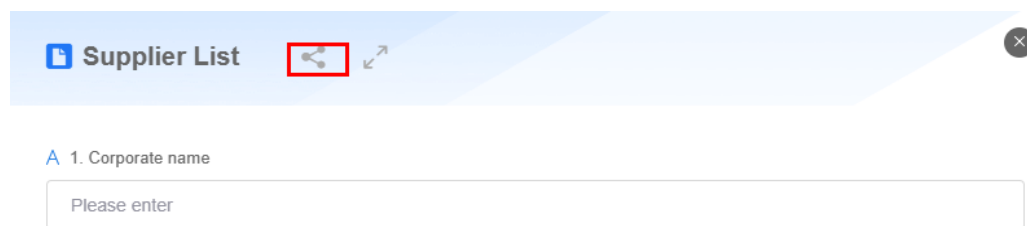
Step 3 On the left of the application development page, select a form on the left and click **Add**.

Figure 4-420 Selecting the add button



Step 4 Click . The sharing rule page is displayed.

Figure 4-421 Clicking the share icon




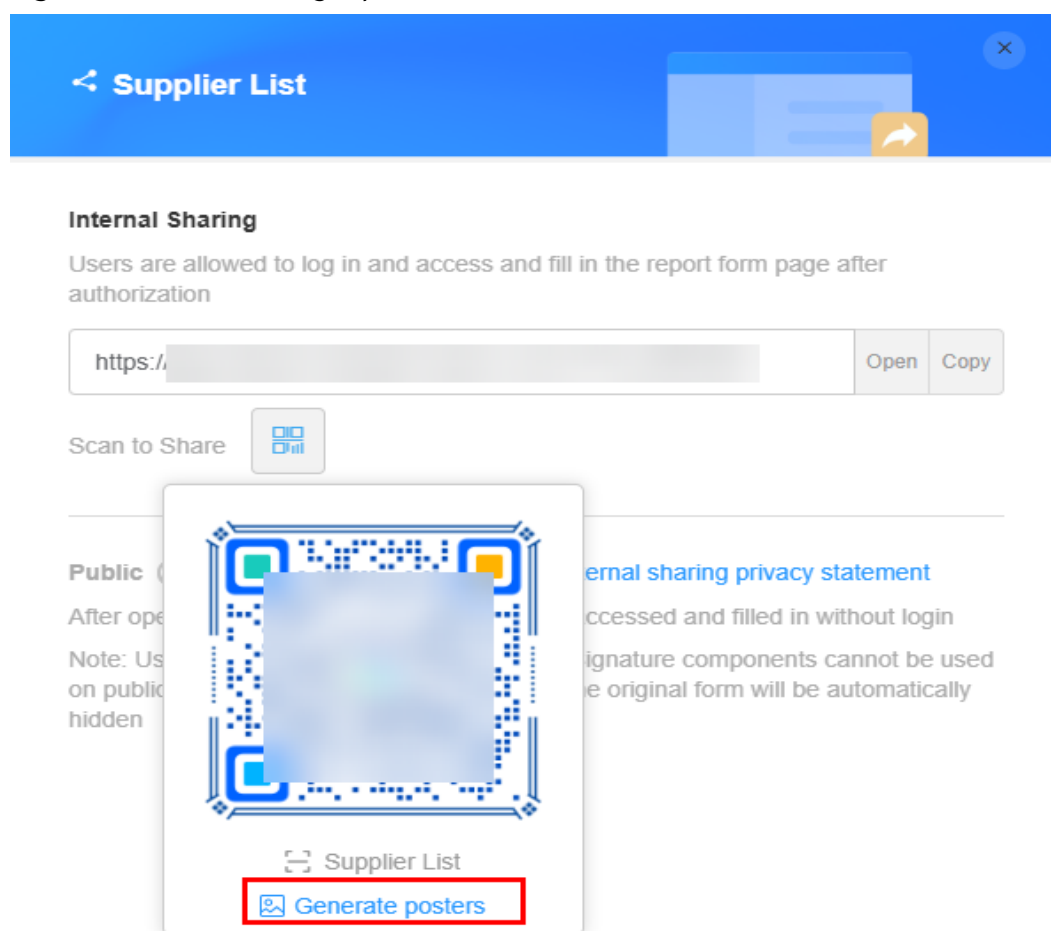
Step 5 Move the cursor to the  icon under **Internal Sharing** or **Public** and click the button to generate a poster.

Figure 4-422 Generating a poster



Step 6 On the displayed page, select a poster template and set the background, title, and description.

Figure 4-423 Setting a poster

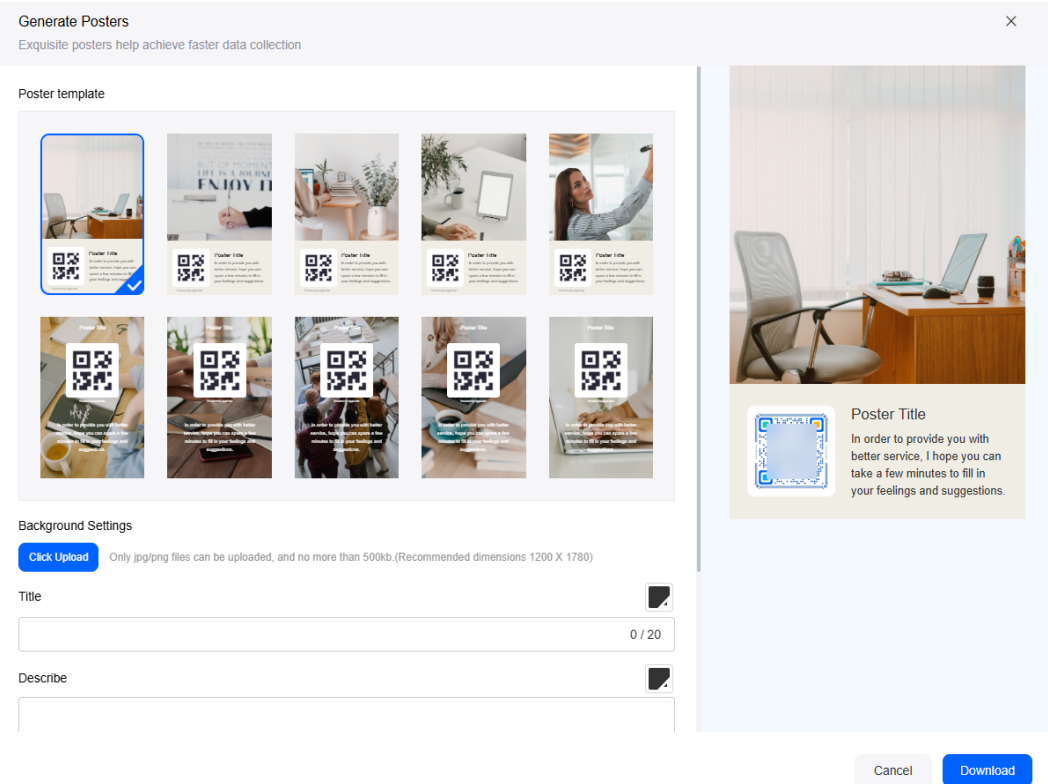


Figure 4-424 Effect

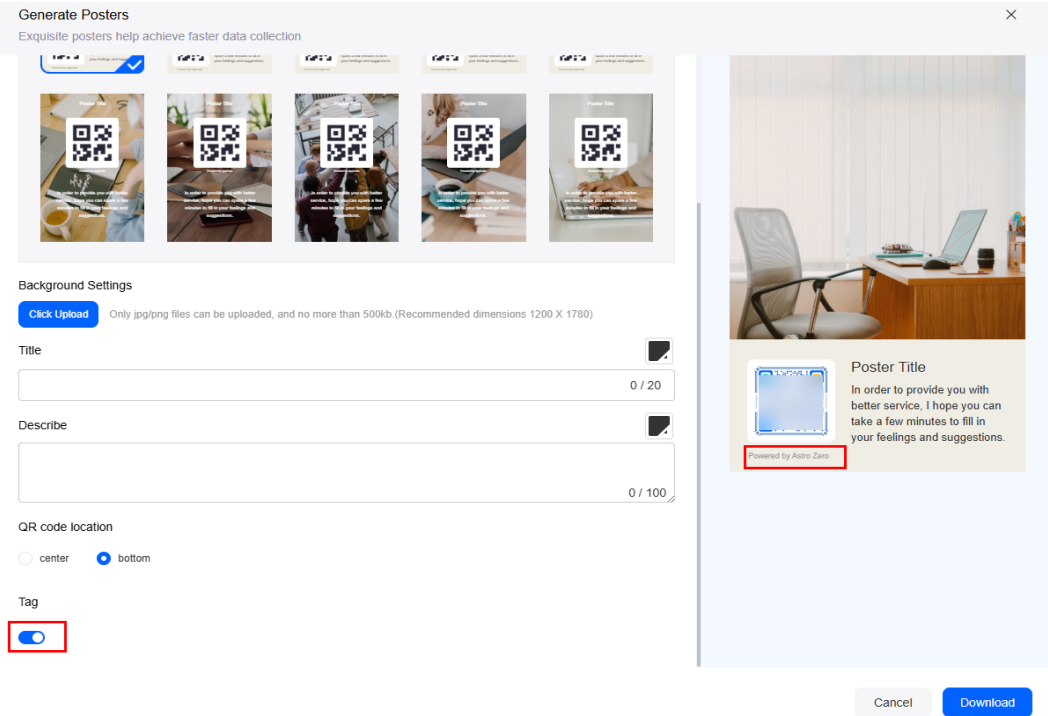


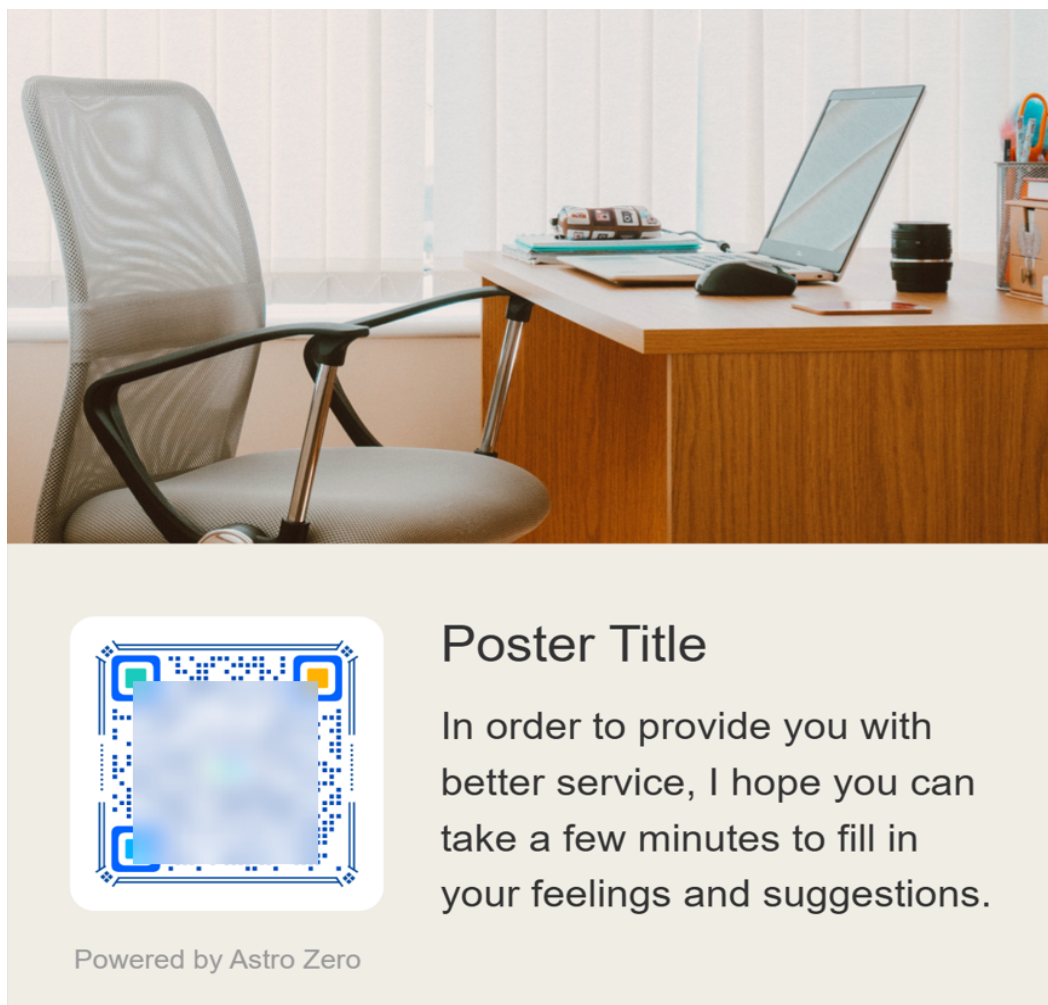
Table 4-28 Parameters for generating a poster

Parameter	Description
Poster template	Select a poster template as required.
Background Settings	You can customize the poster background. The background image to be uploaded must be in JPG or PNG format and the size cannot exceed 500 KB.
Title	Title of a poster. The value contains a maximum of 20 characters.
Description	Description of a poster. The value contains a maximum of 100 characters.
QR code location	Position of the QR code on the poster, for example, center or bottom.
Tag	Whether to display a tag in a poster. See Figure 4-424 .

Step 7 After the setting is complete, click **Download** to download the poster to the local host.

Step 8 Share the poster with other portal users. They can scan the QR code to complete the questionnaire. See [Figure 4-425](#).

Figure 4-425 Sharing the questionnaire QR code to other portal users



----End

4.14 Managing Forms on Mobile Devices

Modifying the Form Name and Icon

You can change the form name. For example, if the form's purpose changes, update the name to help users understand it better.



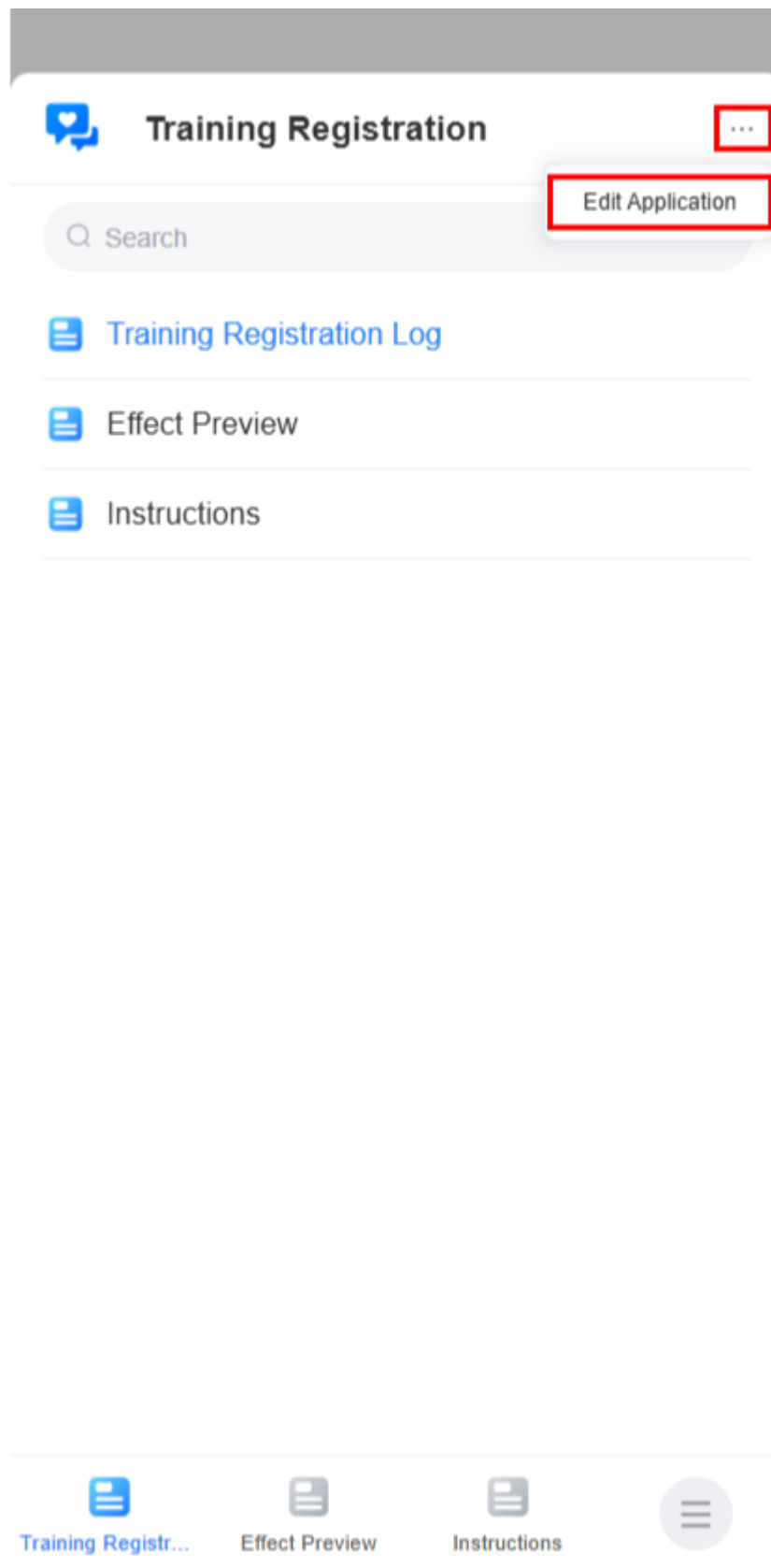
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** Tap an application in **All Apps**.
- Step 3** On the displayed page, tap  in the lower right corner.
- Step 4** On the displayed page, tap  and tap the edit button.

Figure 4-426 Editing an application




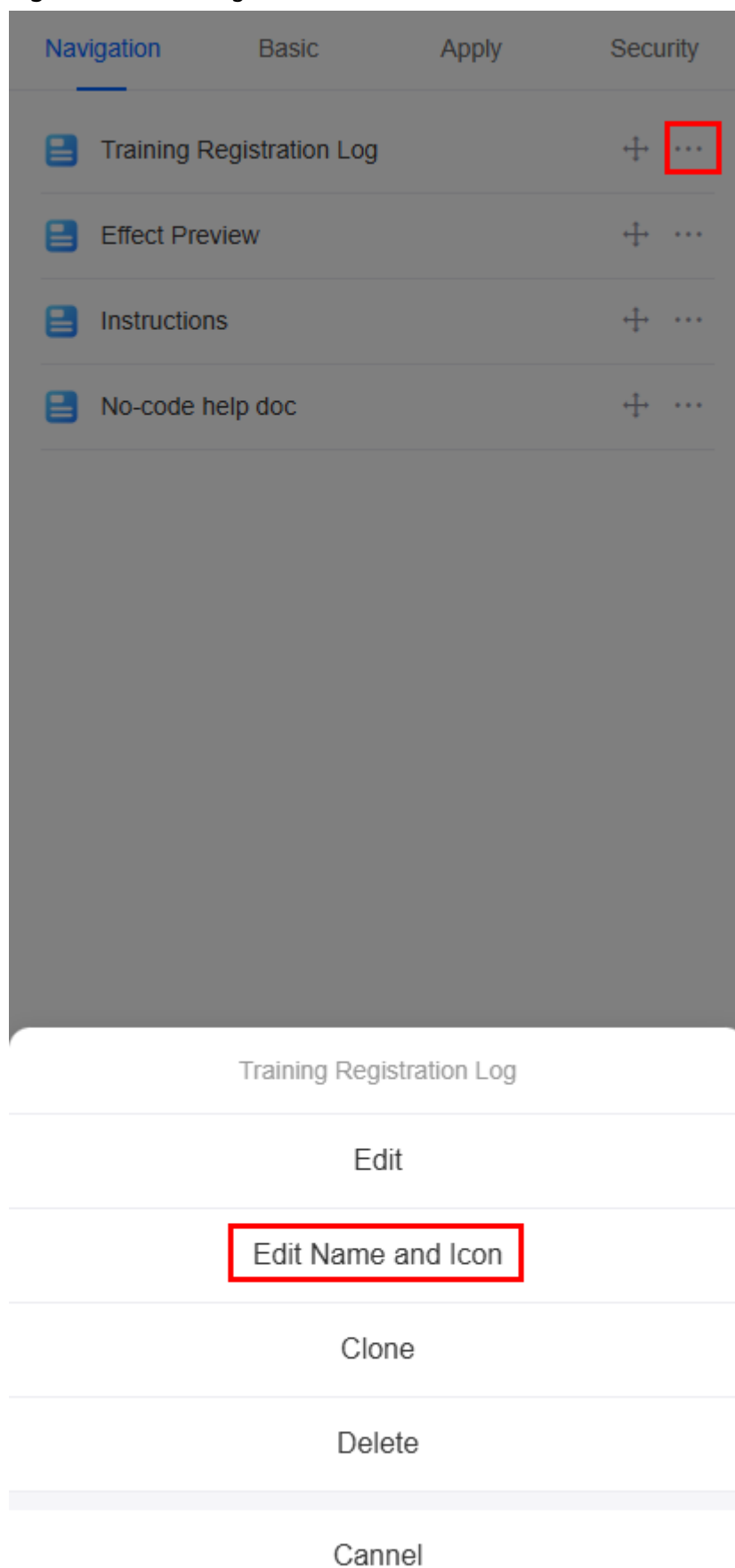
Step 5 In the navigation settings, tap  next to the form and choose to modify the name and icon.

Figure 4-427 Editing the name and icon



Step 6 On the displayed page, modify the form name and icon.


----End


Cloning a Form

If the service scenarios are similar, you can clone a form to create a new one quickly. When you clone a form, only the metadata structure is copied, not the instance data. Cloning a form does not copy its child table widgets. You need to remake them after cloning.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 Tap an application in **All Apps**.

Step 3 On the displayed page, tap  in the lower right corner.

Step 4 On the displayed page, tap  and tap the edit button.


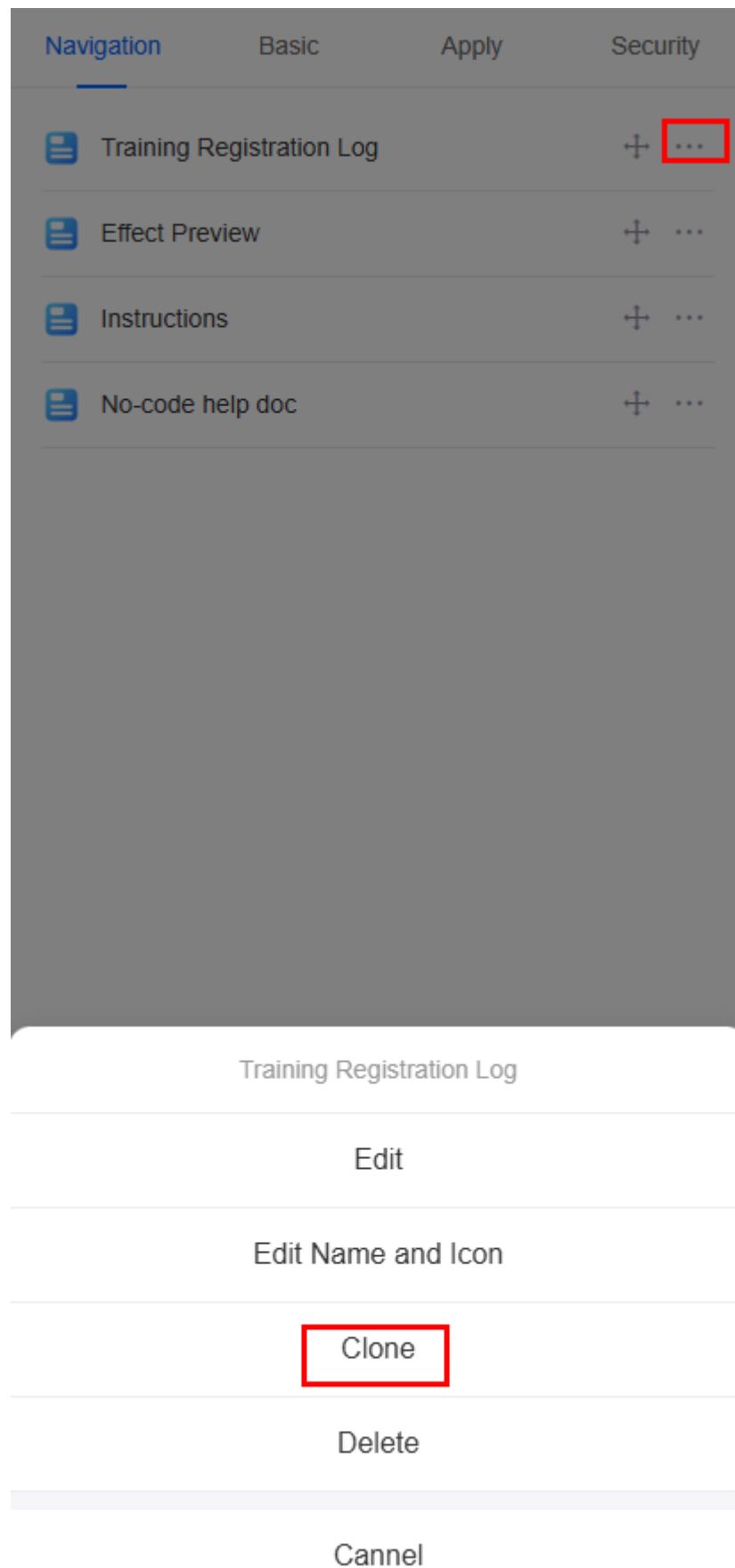
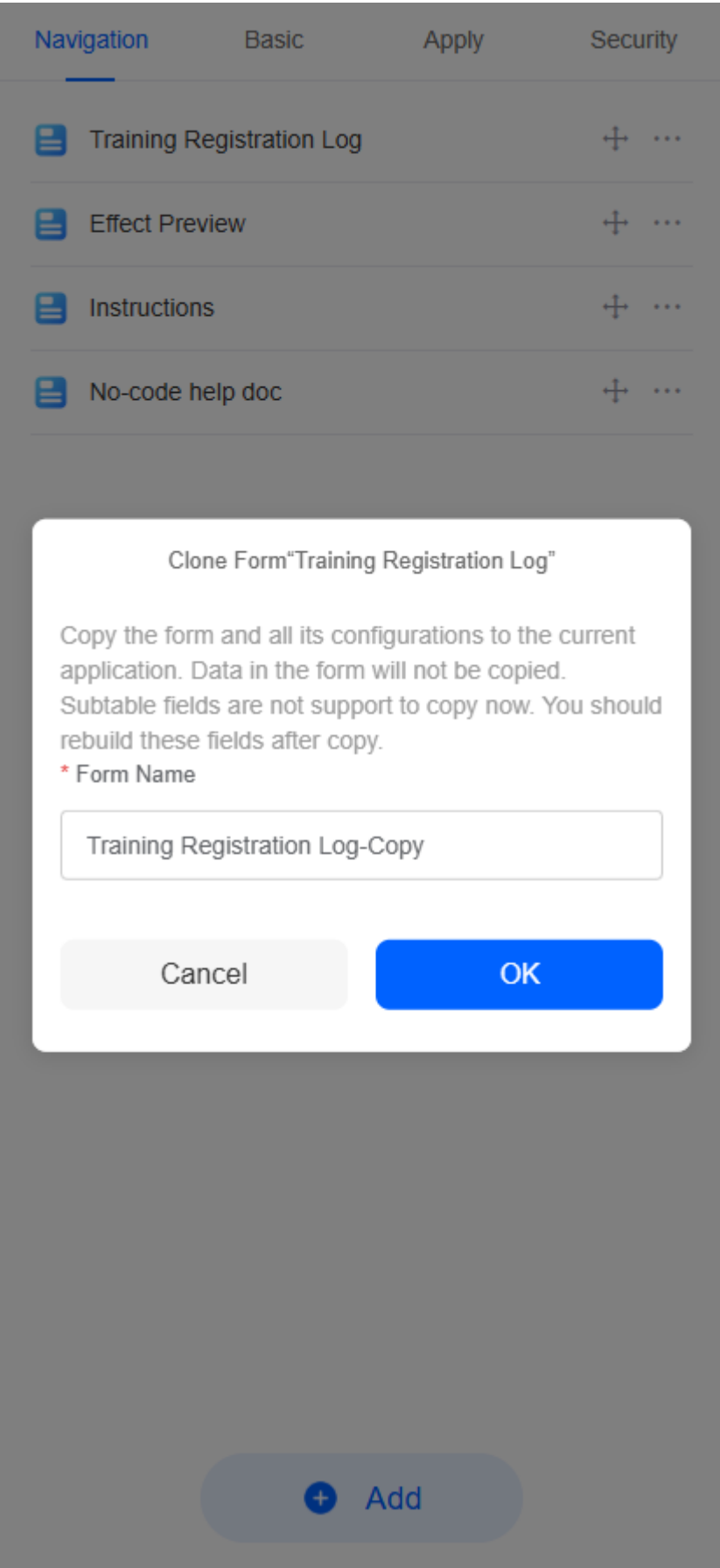
Step 5 In the navigation pane, tap  next to the form and tap the clone button.

Figure 4-428 Tapping the clone button



Step 6 On the displayed page, enter a name and tap the confirm button.

Figure 4-429 Cloning a form



Deleting a Form

If you delete a form, all its views and data will be deleted. This operation cannot be undone.




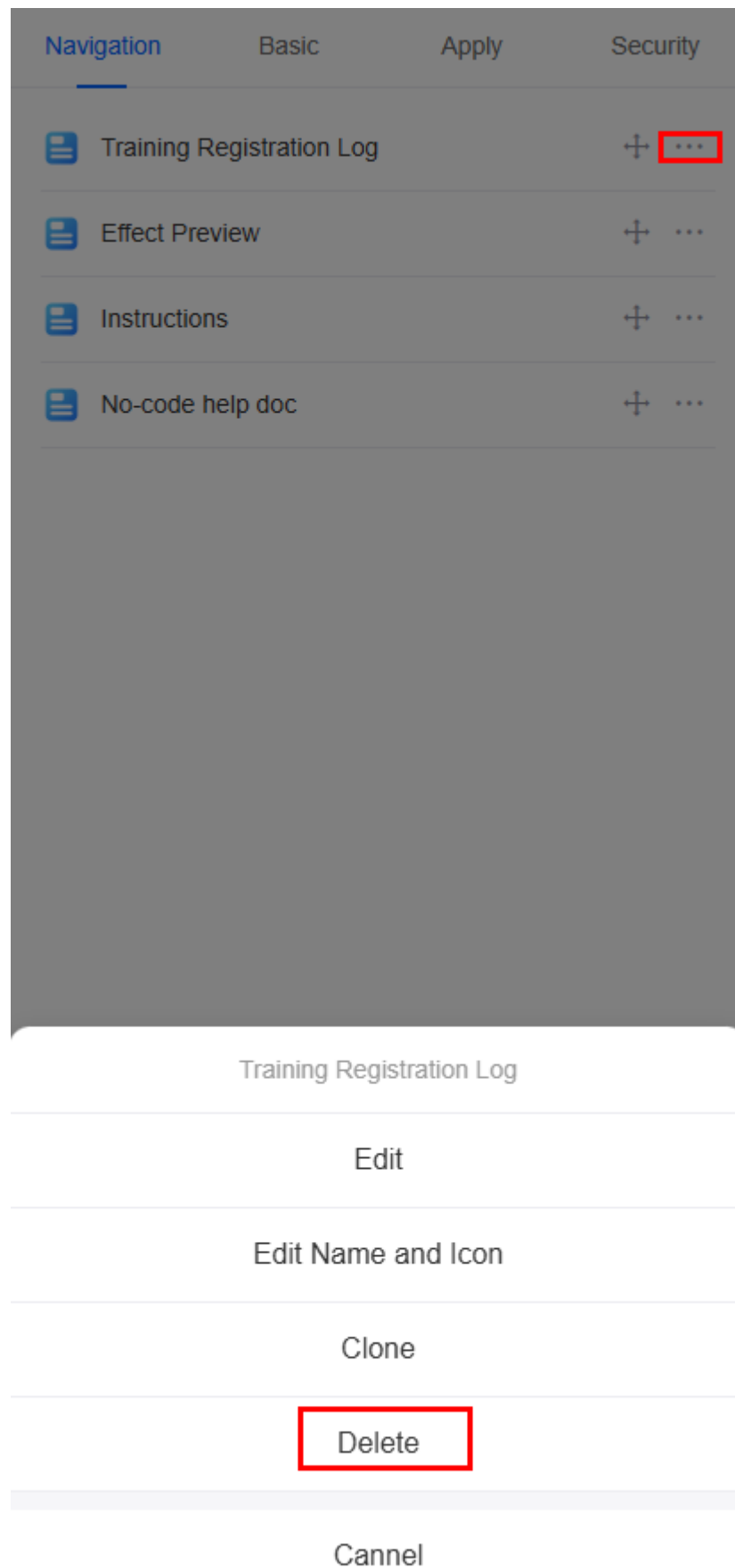
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** Tap an application in **All Apps**.
- Step 3** On the displayed page, tap  in the lower right corner.
- Step 4** On the displayed page, tap  and tap the edit button.
- Step 5** In the navigation pane, tap  next to the form and tap the delete button.

Figure 4-430 Tapping the delete button



Step 6 Confirm the deletion.

----End

4.15 Managing Processes

Editing a Process

After creating a process, you can change its content, like updating the logic or data structure.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.


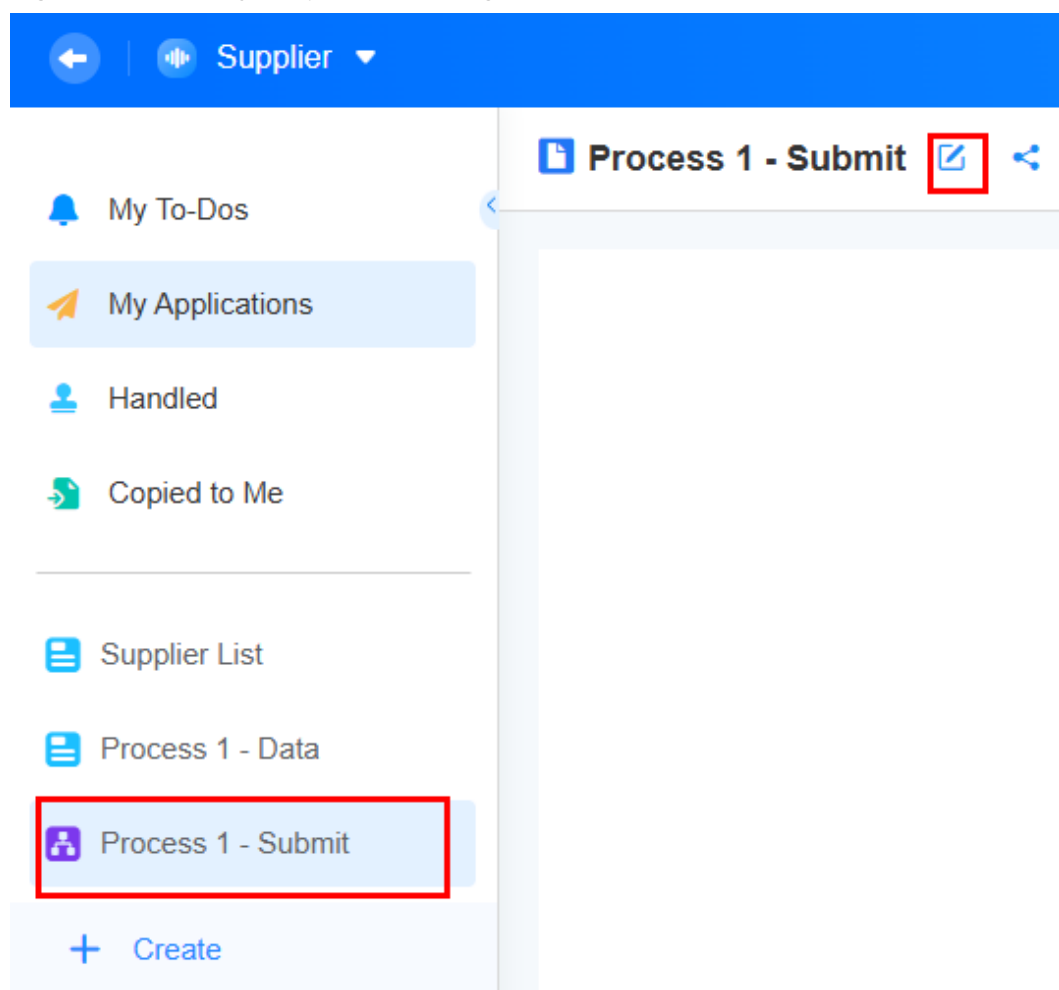
Step 3 Choose the target process on the left, then click  next to its name on the right.

Figure 4-431 Entry for process editing



Step 4 See [Creating a Process](#) to edit the process.

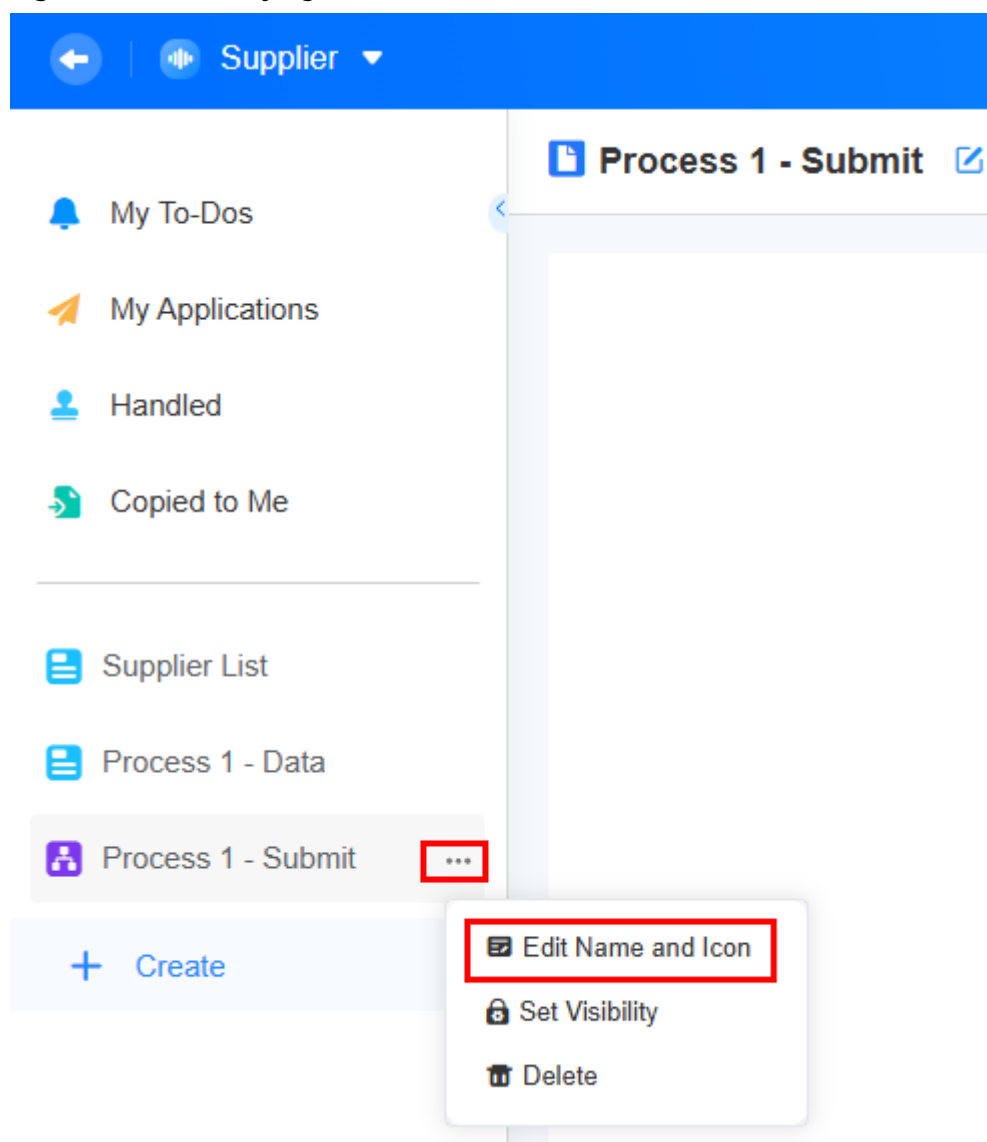
----End

Modifying the Process Name and Icon

You can change the process name. If the process's purpose changes, update the name to help users understand it better.

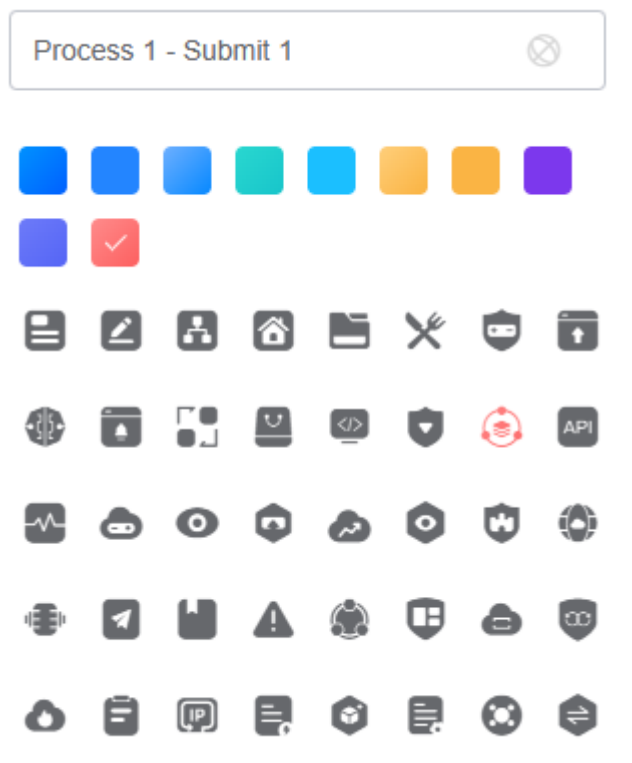
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click ... of the target process and choose **Edit Name and Icon**.

Figure 4-432 Modifying the name and icon



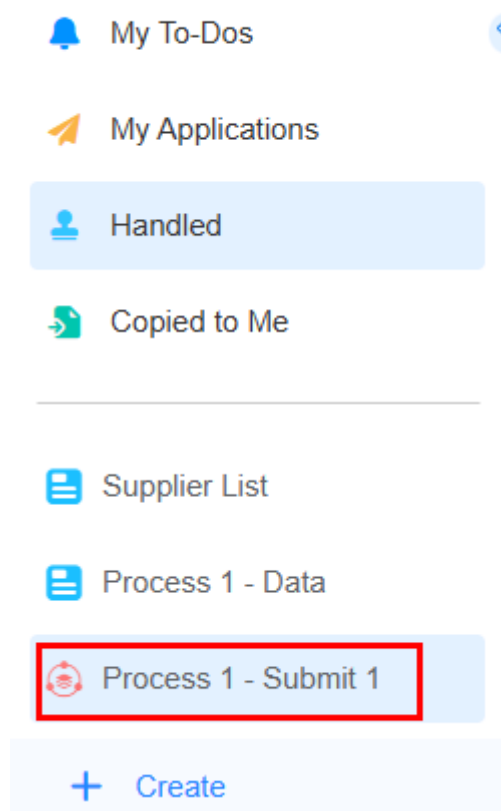
- Step 4** Modify the process name and icon.

Figure 4-433 Modifying the name and icon



After the modification is complete, return to the application editing page. The process name, icon, and icon background color have been changed.

Figure 4-434 Viewing the modified name and icon



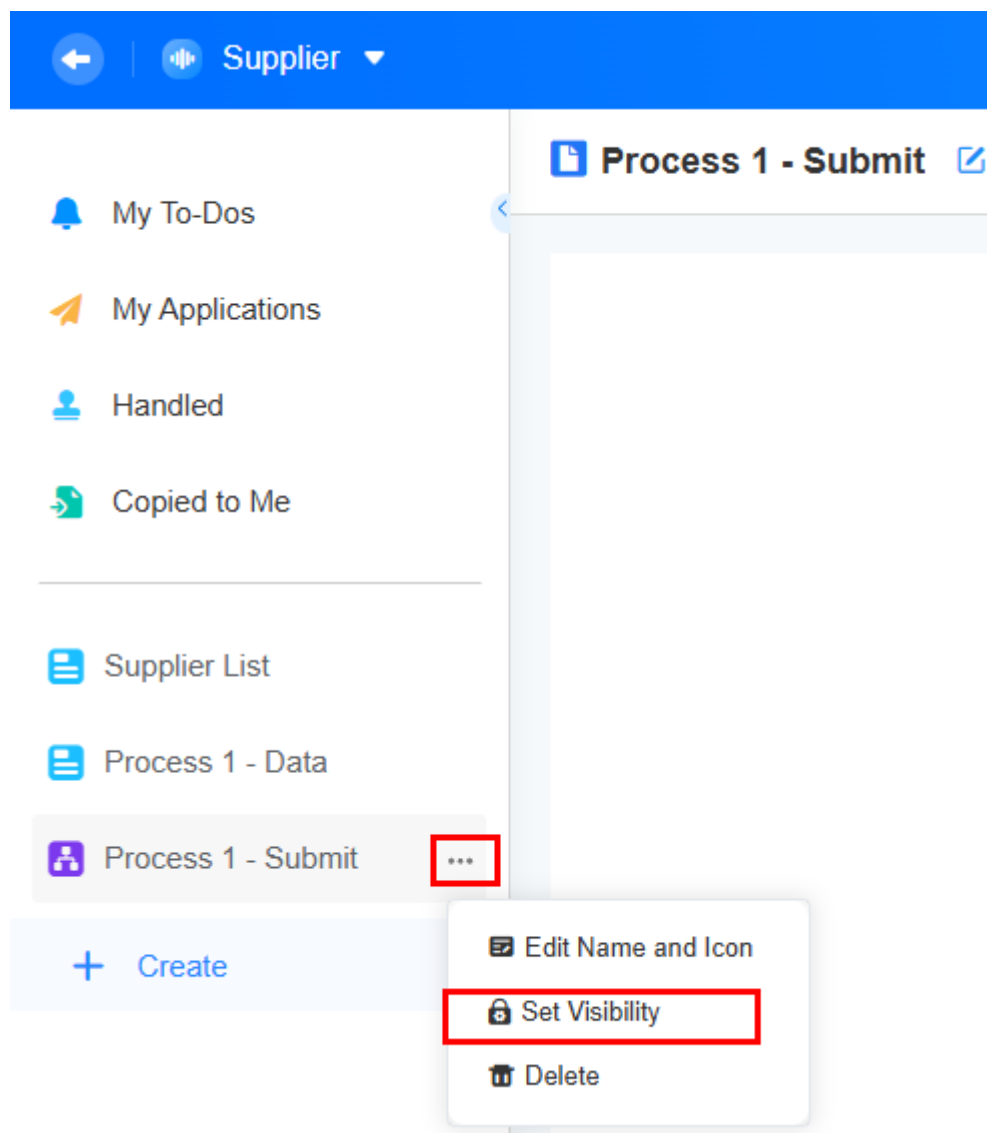
----End

Setting Process Visibility

After a process is created, you can set its visibility permissions to specify which roles can view it. This enhances data security.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the displayed page, click ... on the right of a process name and choose **Set Visibility**.

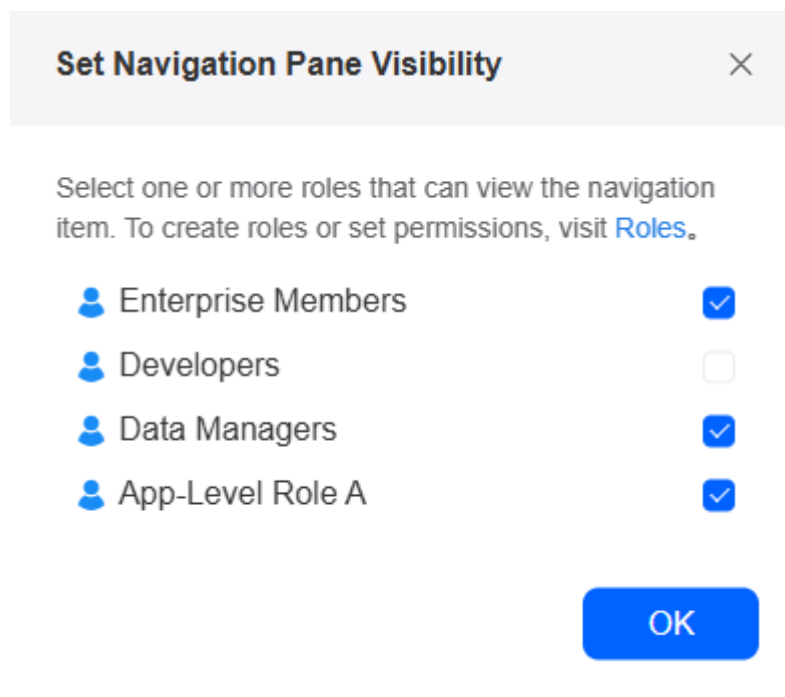
Figure 4-435 Choosing Set Visibility



Step 4 Select roles that can view the process and click **OK**.

See [Application Role Permission Overview](#) to create roles and set more application permissions. For example, if the developer role is deselected, users whose role is developer cannot view "Process 1-Initiation".

Figure 4-436 Selecting roles



Step 5 Check if the process visibility is set.


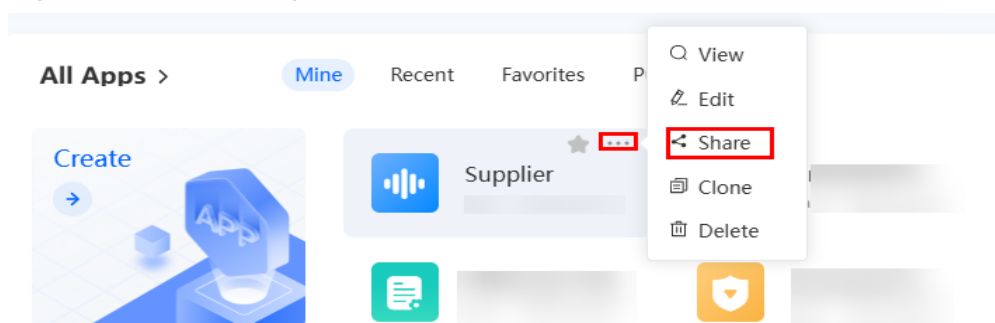
1. On the application development page, click  in the upper left corner to return to the no-code workbench.
2. Choose **All Apps** > **Mine**, move the cursor to the target application's ..., and choose **Share**.

Figure 4-437 Choosing Share



3. Copy the application access link and send it to a user whose role is developer. After the user opens the link, "Process 1-Initiation" is not displayed.

Figure 4-438 Copying the application link

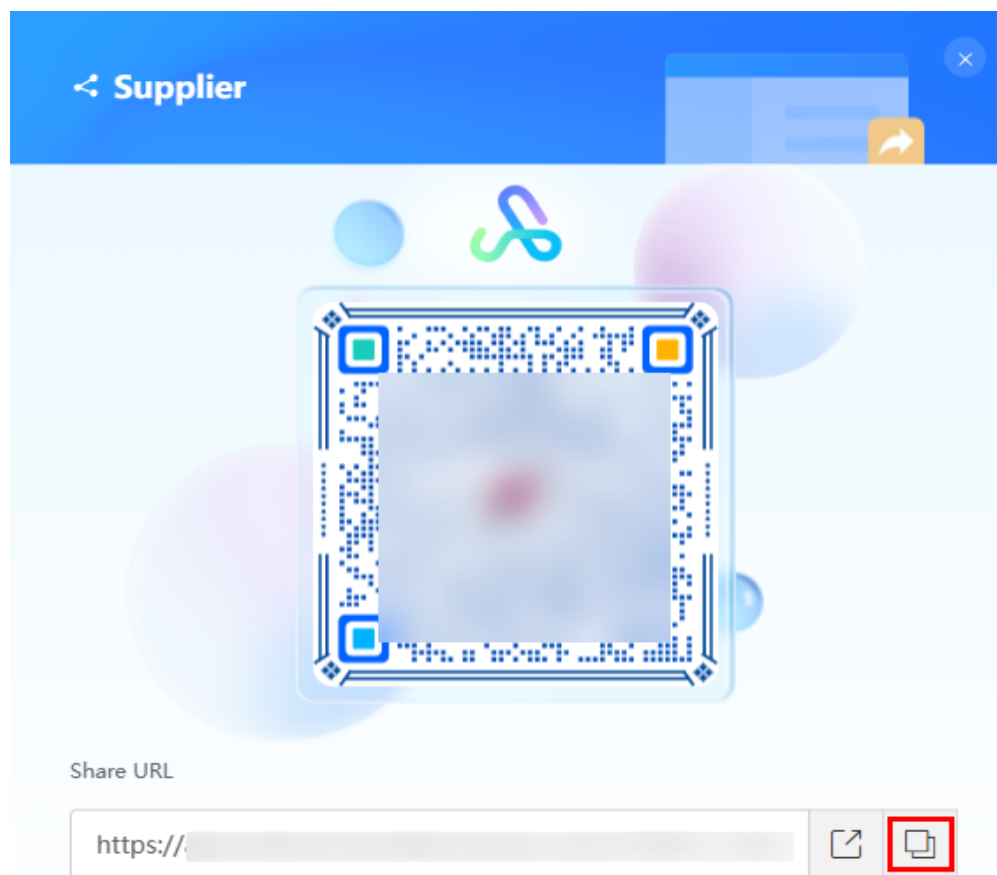
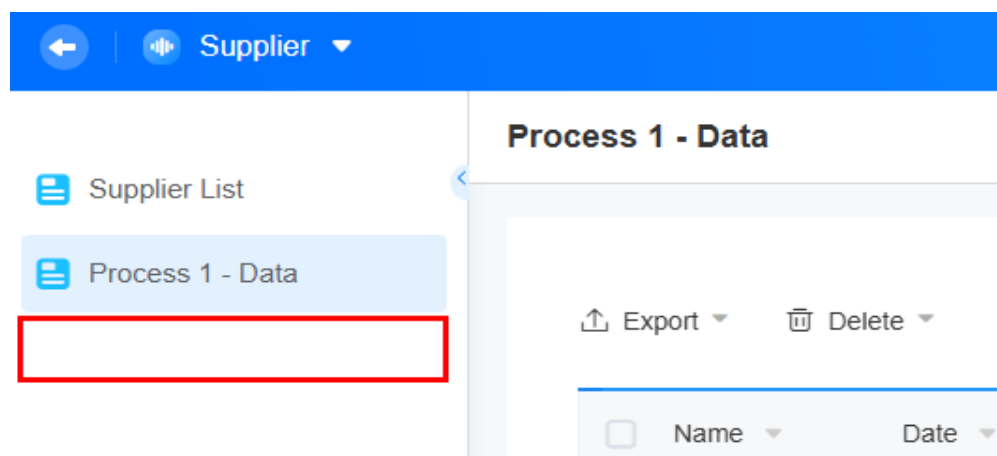


Figure 4-439 Process 1-Initiation not displayed



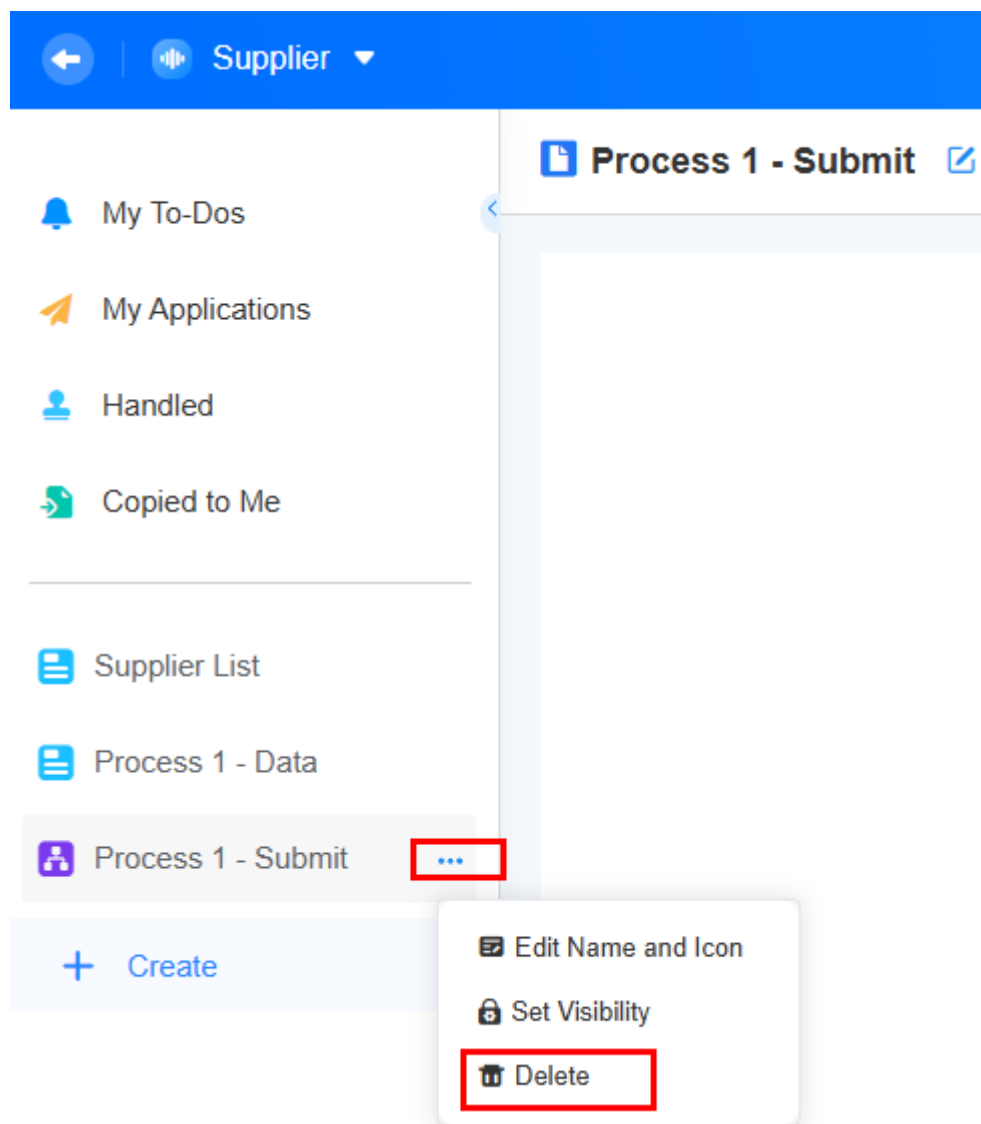
----End

Deleting a Process

A deleted process cannot be restored. Before performing this operation, ensure that the process is no longer needed.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** On the left of the displayed page, click ... on the right of a process name and choose **Delete**.

Figure 4-440 Deleting a process



- Step 4** In the displayed dialog box, select I confirm that the process is permanently deleted and confirm the deletion.

----End

Enabling or Stopping a Process

Enable the process before initiating it to avoid submission errors.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 In the list on the left, select a process and click  on the right of the process name.

Step 4 In the upper right corner of the page, click **Running** to stop or **Closed** to enable the process.

Figure 4-441 Stopping a process

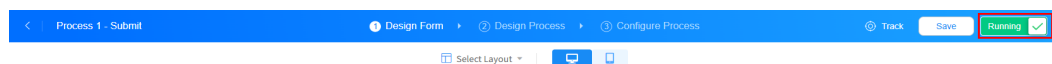
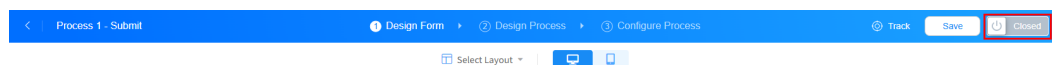


Figure 4-442 Enabling a process



----End

Sharing a Process

You can share a process with both internal and external users.

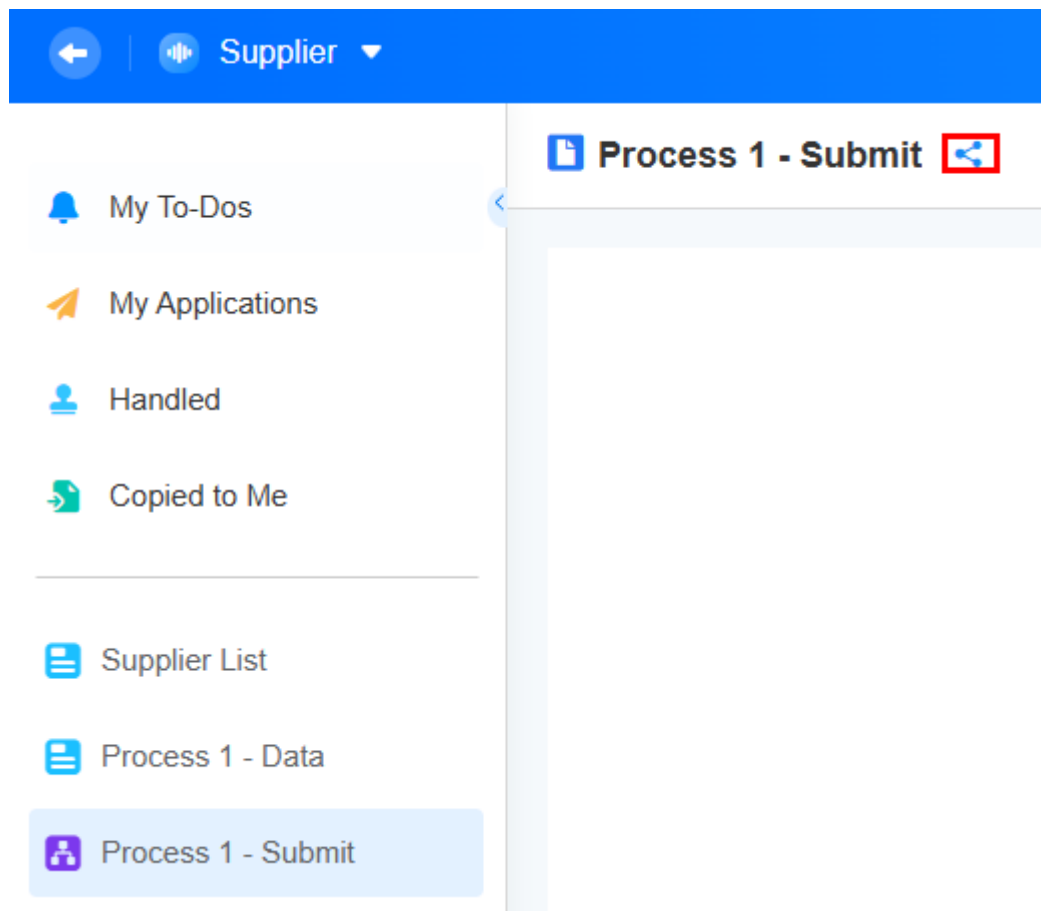
Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, click the target application. The application development page is displayed.

Step 3 On the application development page, click a process.

Step 4 Click the share icon. The process sharing page is displayed.

Figure 4-443 Accessing the sharing page



Step 5 Set sharing rules as required.

Figure 4-444 Setting process sharing rules

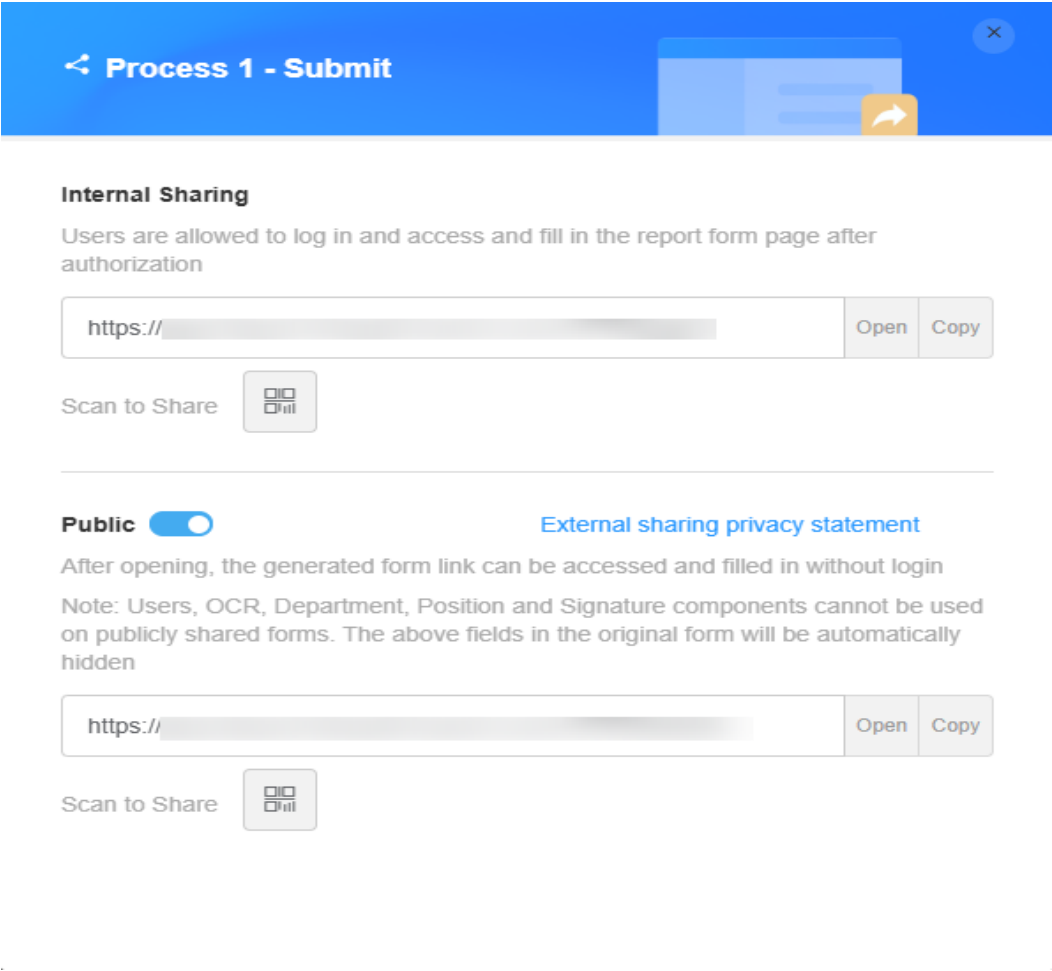




Table 4-29 Process sharing parameters

Parameter	Description
Internal Sharing	<div>Share the form with internal users. When this is enabled, internal users can log in to the system and fill in the form.</div> <div><ul style="list-style-type: none">• Open: Fill in the information in a new window.• Copy: Copy the link and share it with other users.• : Common QR code (WeLink, WeChat, or WeCom). Generate a poster by clicking the button in the QR code. For details, see Generating a Poster from a Form.</div>

Parameter	Description
Public	<p>Anonymous users can scan the QR code to access and fill in the form page without login.</p> <ul style="list-style-type: none">• Open: Fill in the information in a new window.• Copy: Copy the link and share it with anonymous users.• : Common QR code (WeLink, WeChat, or WeCom). Generate a poster by clicking the button in the QR code. For details, see Generating a Poster from a Form.

----End

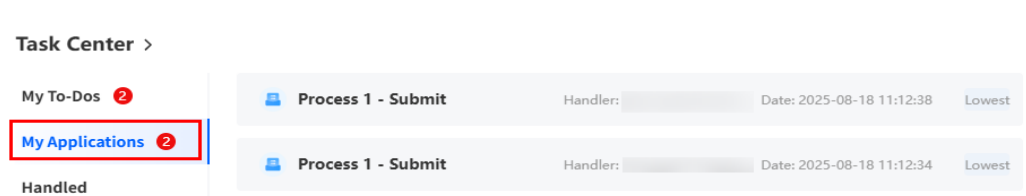
Copying a Process

If the data for a new process is similar to a previous one, you can copy a historical application to create an application.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

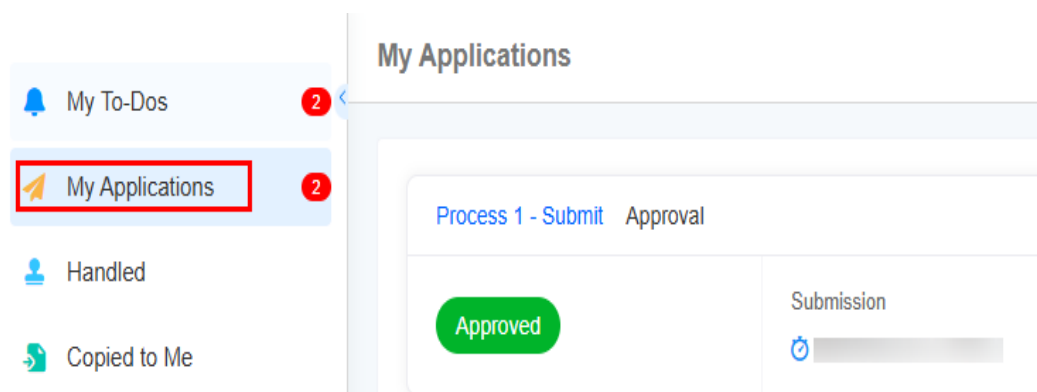
Step 2 In the task center, click **My Applications**.

Figure 4-445 Clicking My Applications



You can also go to the corresponding app and click **My Applications**.

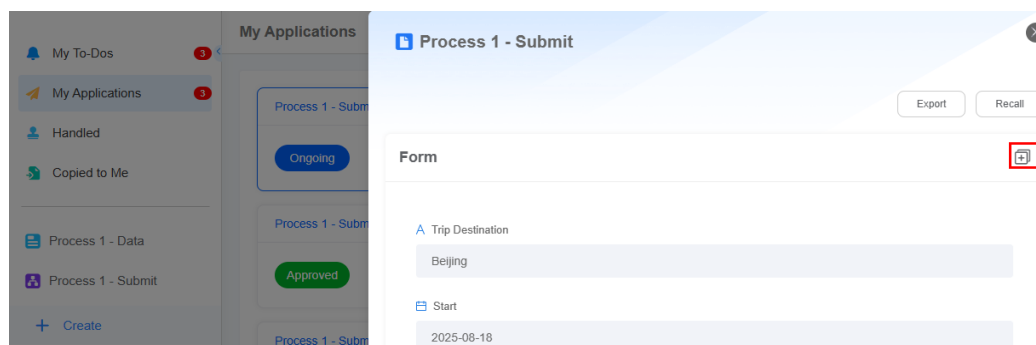
Figure 4-446 Clicking My Applications in an application



Step 3 In the application list on the right, click the process to be copied.

Step 4 In the initiation process, click  next to the form.

Figure 4-447 Clicking the copy button

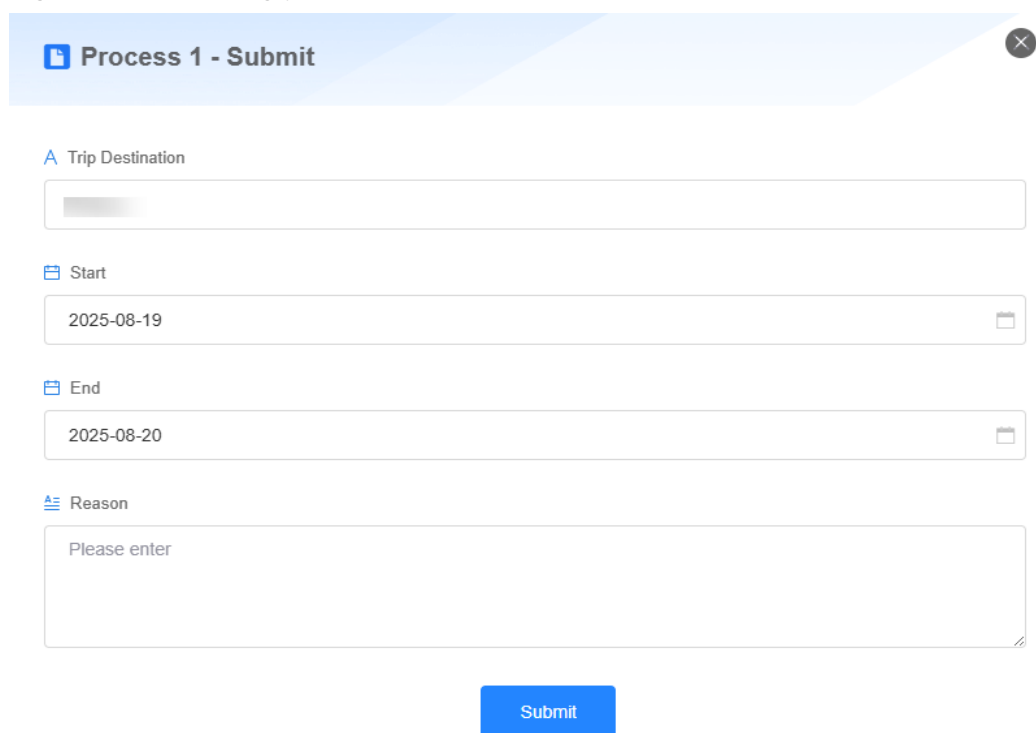


Step 5 Confirm the operation.

The current version does not support the copy of attachment type field values.

Step 6 On the displayed page, set related information and click the submit button.

Figure 4-448 Setting process information

The image shows the 'Process 1 - Submit' form in detail. It has a title bar 'Process 1 - Submit' with a close button. The form contains four sections: 'Trip Destination' with a text input field; 'Start' with a date input field showing '2025-08-19'; 'End' with a date input field showing '2025-08-20'; and 'Reason' with a larger text input field containing the placeholder 'Please enter'. At the bottom center is a blue 'Submit' button.

----End

4.16 Managing External Links

Modifying External Link Name and Icon

You can rename an external link. This helps users understand its new purpose.


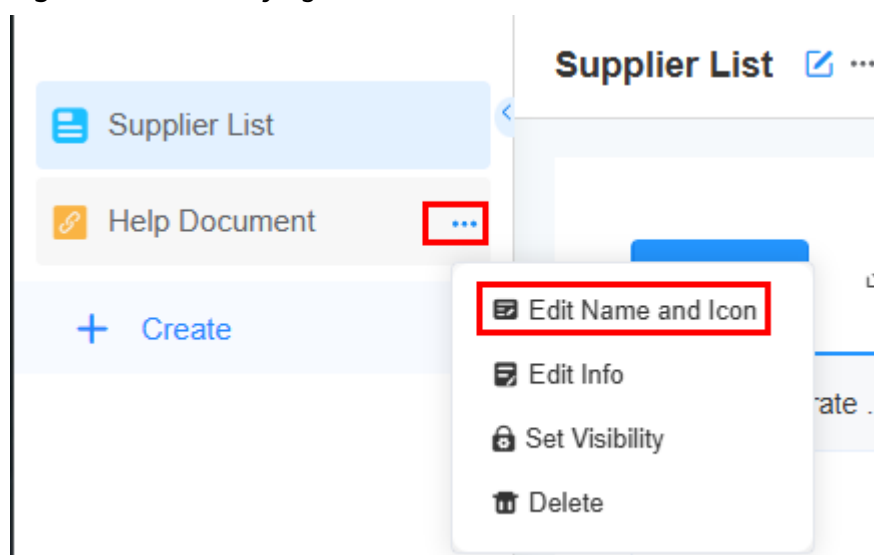
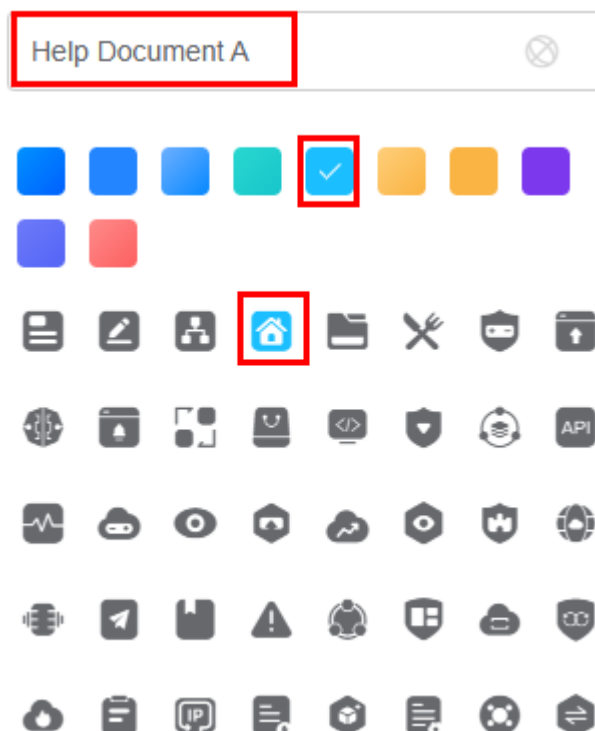
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Move the cursor to an external link, click , and click the button to modify the name and label.

Figure 4-449 Modifying the name and icon



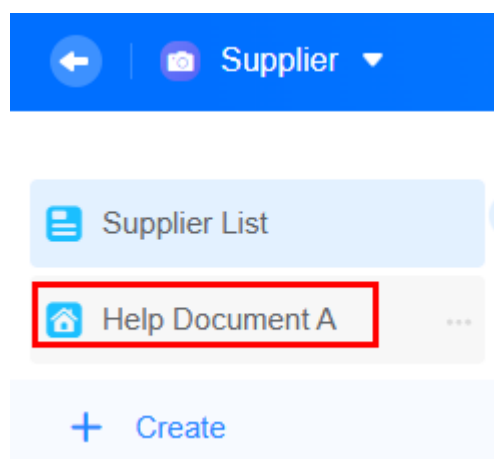
- Step 4** Set the name and icon of the external link.

Figure 4-450 Setting a new name and icon



After the modification, return to the application editing page. The external link name, icon, and icon background color have been changed.


Figure 4-451 Viewing the modified name and icon



----End

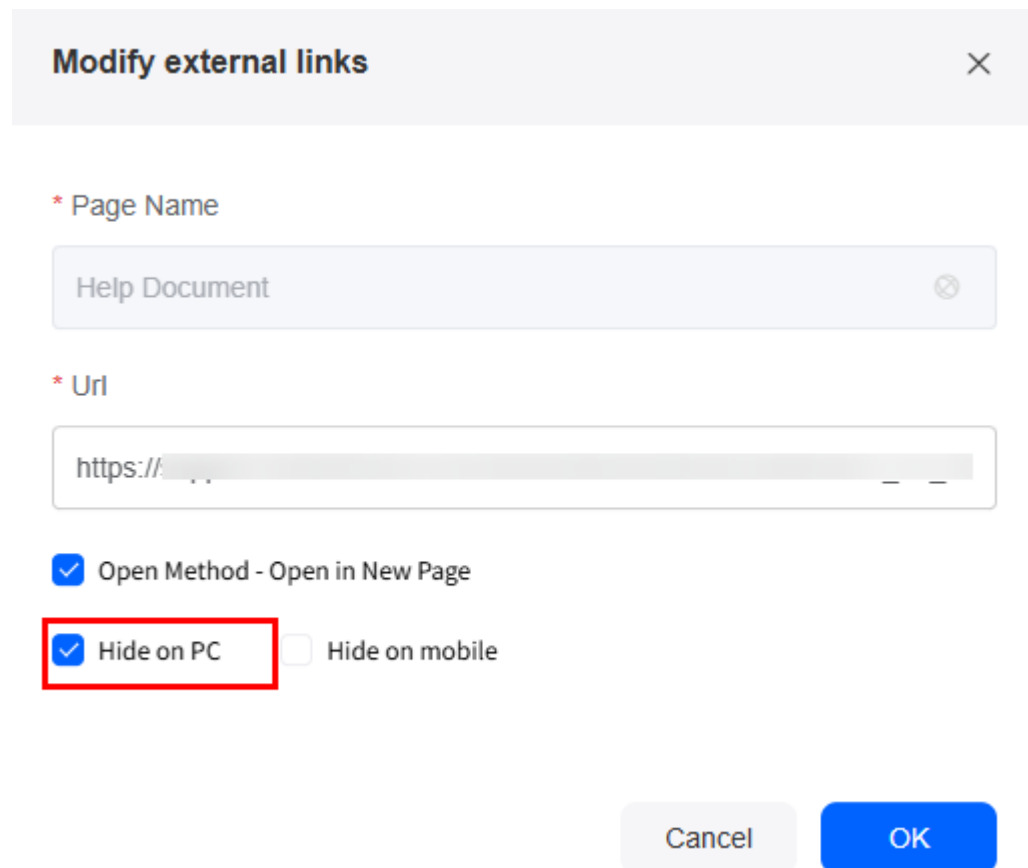
Modifying External Link Information

After creating an external link, you can edit its details, like the URL, how it opens, and whether to hide it on PC or mobile.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Move the cursor to the created external link, click , and click the button to modify information.
- Step 4** Set the external link information by referring to [Creating an External Link](#) and click the confirm button.

For example, hide the external link on PCs.

Figure 4-452 Selecting Hide on PC



Modify external links ×

* Page Name
Help Document

* Url
https://...

☒ Open Method - Open in New Page

☒ Hide on PC ☐ Hide on mobile

Cancel OK


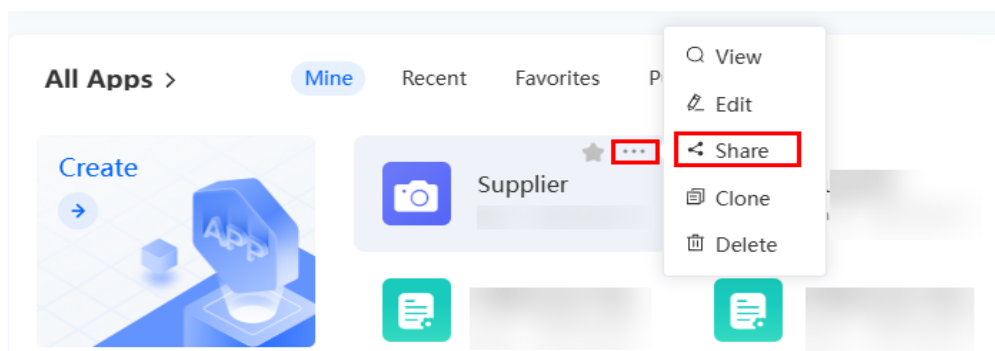
- Step 5** Check whether the modification is valid.
1. On the application development page, click  in the upper left corner to return to the no-code workbench.
 2. Choose **All Apps** > **Mine**, move the cursor to the target application's ..., and choose **Share**.

Figure 4-453 Choosing Share

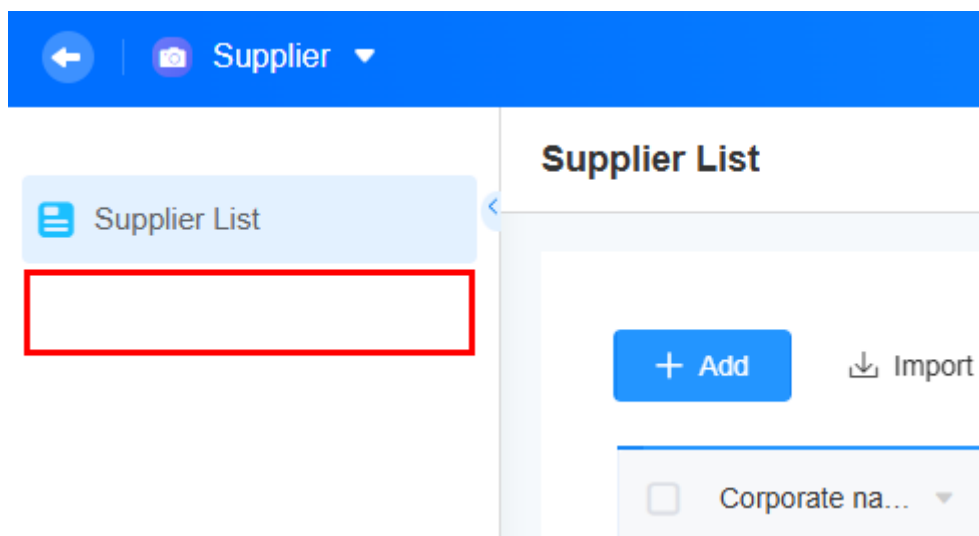


3. Copy the application's access link, open it in the browser. The modified external link is not found.

Figure 4-454 Copying the access link of the application



Figure 4-455 Link not found



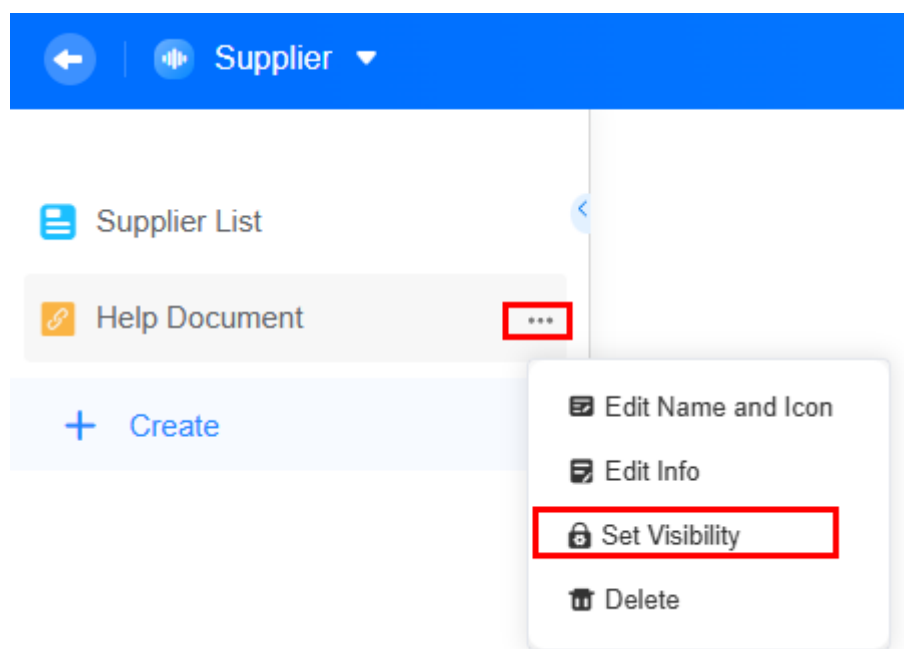
----End

Setting the External Link Visibility Permission

You can set who can see external links by choosing specific roles. This helps users avoid seeing irrelevant links and improves their experience.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Move the cursor to the created external link, click **...**, and choose **Set Visibility**.

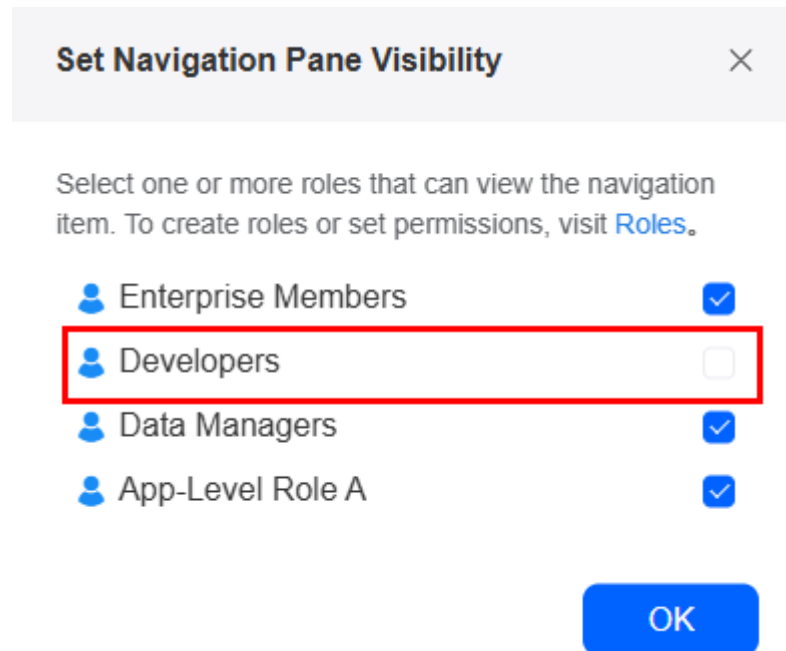
Figure 4-456 Choosing Set Visibility



Step 4 Select the roles that can view the external link, then click **OK**.

If Zhang San's role is **Developers**, deselecting **Developers** means Zhang San cannot view the external link after logging in.

Figure 4-457 Setting the visibility of an external link



Step 5 Check whether the external link visibility is set.


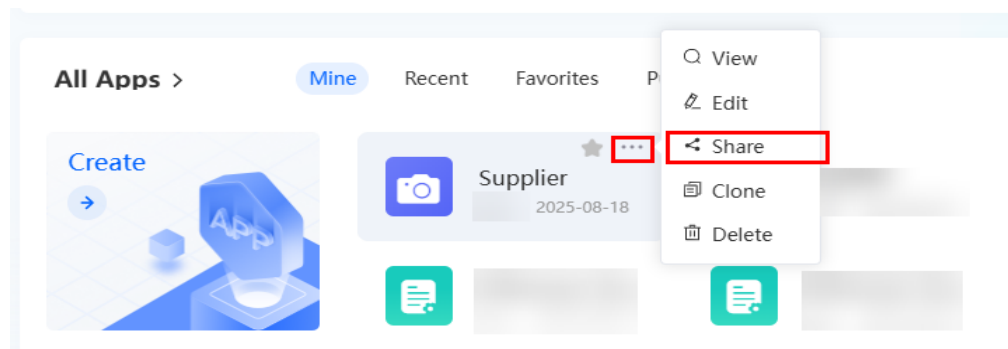
1. On the application development page, click  in the upper left corner to return to the no-code workbench.
2. Choose **All Apps** > **Mine**, move the cursor to the target application's ..., and choose **Share**.

Figure 4-458 Choosing Share

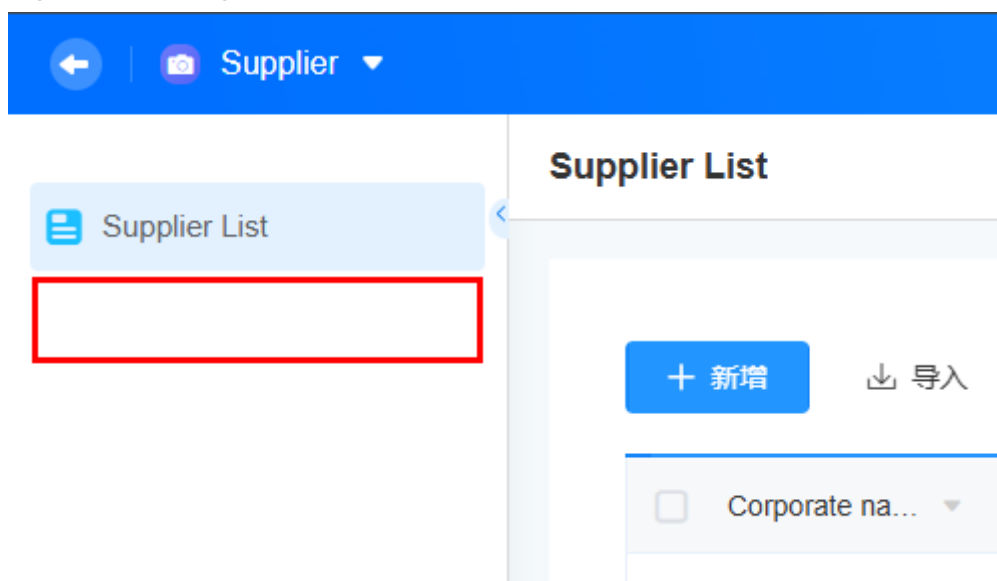


3. Copy the application link and send it to a user like Zhang San, whose role is **Developers**. Zhang San cannot access the page using that link.

Figure 4-459 Copying the application link



Figure 4-460 Page not found




-----End

Deleting an External Link

Deleted external links cannot be restored. Exercise caution when performing this operation.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 Move the cursor to the created external link, click , and choose to delete the link.

Step 4 In the displayed dialog box, click the confirm button.

Deleted external links cannot be restored. Exercise caution when performing this operation.

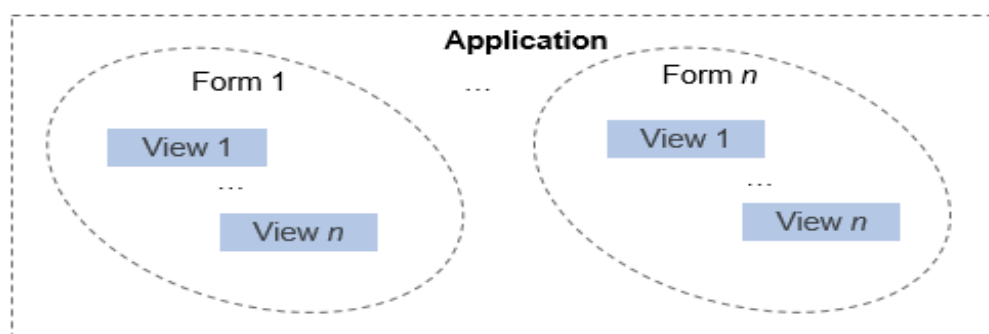
----End

5 Customizing a View

5.1 View Overview

Views are pages that show service data. They can be made for different user roles or services, showing data in different ways. When you create an application on the no-code workbench, a table view called **All** is created. It shows all the data. A form can have many views. All views of the same form share the same data. Any changes to the data will update across all these views.

Figure 5-1 Relationships between applications, forms, and views



For example, a food ordering application makes a view for each department. Department A, B, and C each get their own view. In the view editor, you can filter each department's data to help manage orders.

5.2 Creating a View

When you create an application form on the no-code workbench, a table view called **All** is created. It shows all form data. You can customize it to better display and manage form data.

Prerequisites

- You have created a no-code application. If not, see [Creating a No-Code Application](#).
- You have created a form. If not, see [Creating a Form or Process](#).

Adding a View to a Form

A form can have many views. All views of the same form share the same data. Any changes to the data will update across all these views.

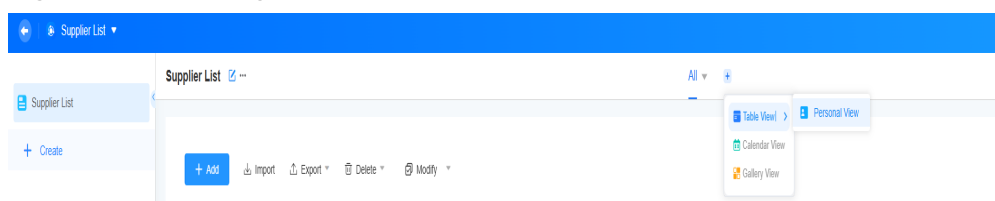
Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 Add a personal view to the form.

1. Select the target form, click + on the right of **All**, and choose **Table View** > **Personal View**. The view development page is displayed.

Figure 5-2 Selecting Personal View



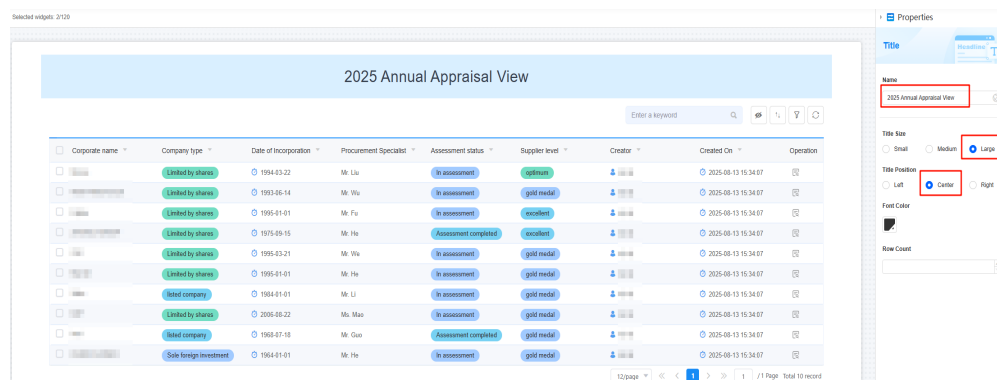
2. In the upper left corner, delete the default view name and enter a new one. The view name should clearly show its function or content. It must be unique within the same form.

Figure 5-3 Setting the view name



3. In the upper middle area, select a terminal view type. Choose PC or mobile view so the process works best on each device.
4. Drag a widget from the left to the middle area and set the widget properties. For example, drag a title widget to the top of the canvas, change the widget name to "2025 Annual Appraisal View" and set the title size to large and position to center, as shown in [Figure 5-4](#). For details about other widgets, see [Setting Form Widget Properties](#).

Figure 5-4 Designing a personal view



5. Click **Save** in the upper left corner of the page.

Step 4 Set the data to show in the view.

1. On the right menu bar, choose **Data Scope**.
2. Choose **Hidden Field Settings** to decide which fields to show or hide in the view. By default, all fields are shown.

Figure 5-5 Setting the fields displayed in the view

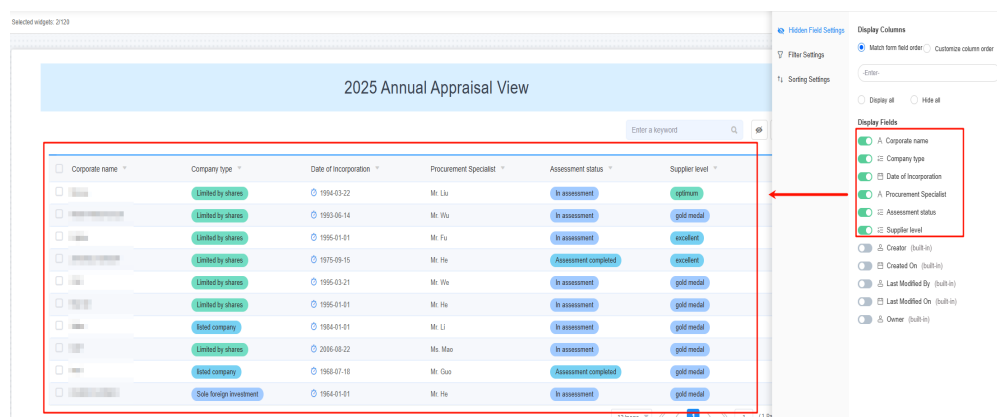


Figure 5-6 Adjusting the field display sequence

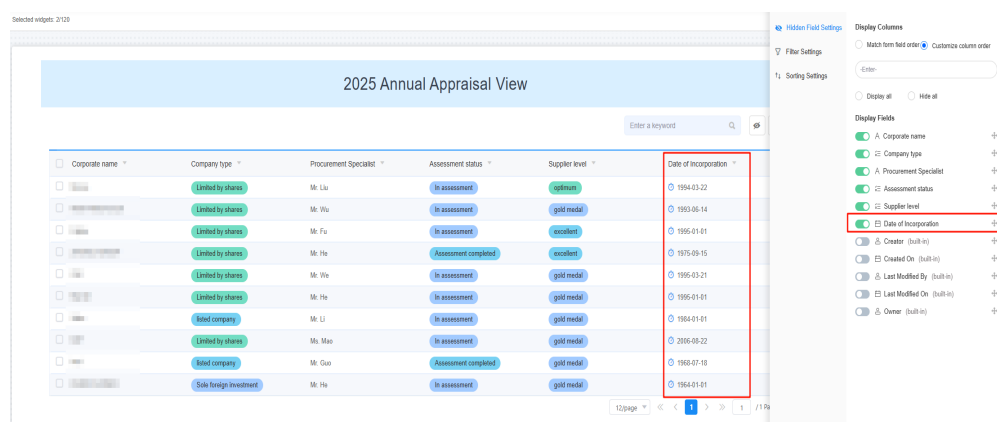

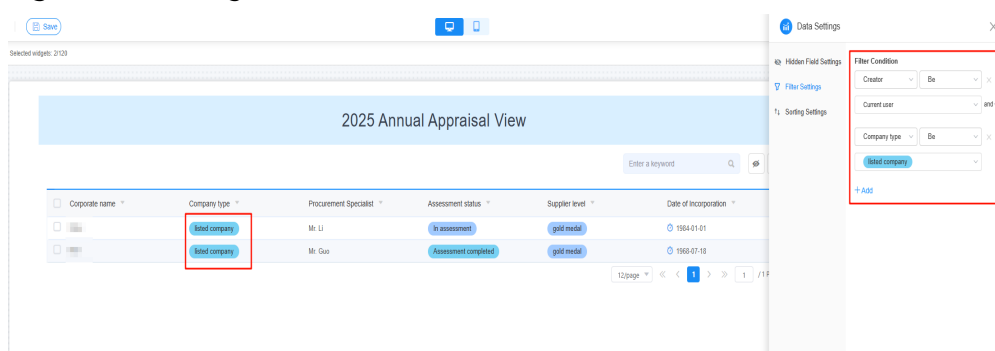


Table 5-1 Parameters for hiding fields

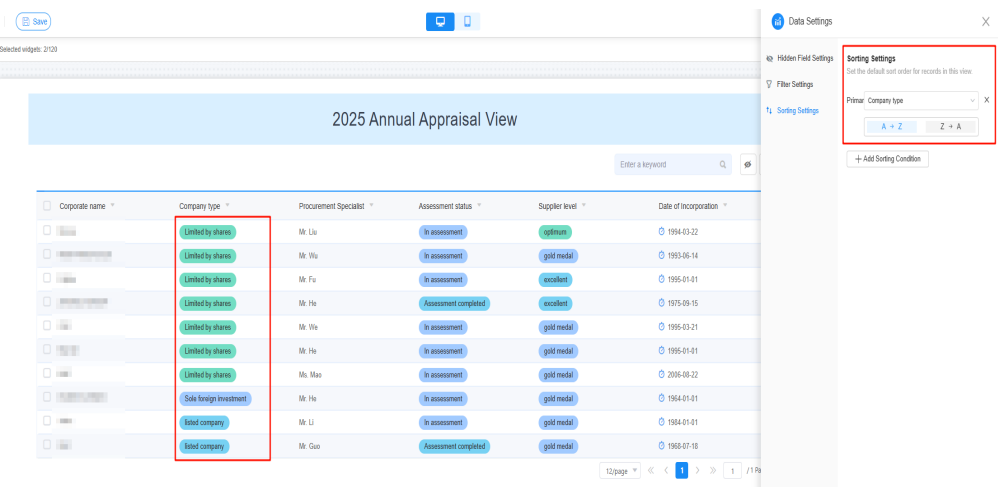
Parameter	Description
Match from field order	If checked, the field order in the view matches the form's field order.
Customize column order	If checked, you can set the column order in the view as you like. Drag  next to a field under Display Fields to adjust the field sequence. For example, you can drag the company type to the first column in the view, as shown in Figure 5-6 .
Display all	If checked, all form fields are shown in the view.
Hide all	If checked, all form fields are hidden in the view.

3. Choose **Filter Settings** and set filter criteria to display data as required.
For example, you can display data where the creator is the current user and the company type is listed company, as shown in the following figure.

Figure 5-7 Setting filter criteria

4. Choose **Sorting Settings** to sort the data in the view.
For example, you can display data sorted alphabetically by company type (A to Z), as shown in the following figure.

Figure 5-8 Setting sorting



- Step 5** Set the view appearance.
- 1. On the menu bar on the right, choose **Display Settings**.
 - 2. Choose **Basic** to set the view operation mode and row height.

Figure 5-9 Basic settings

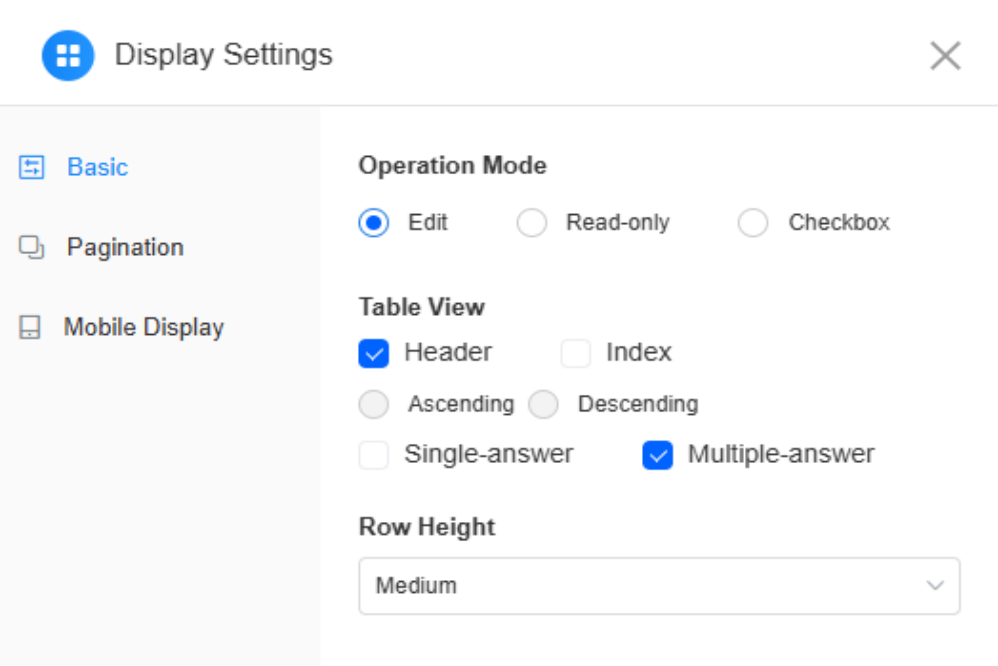
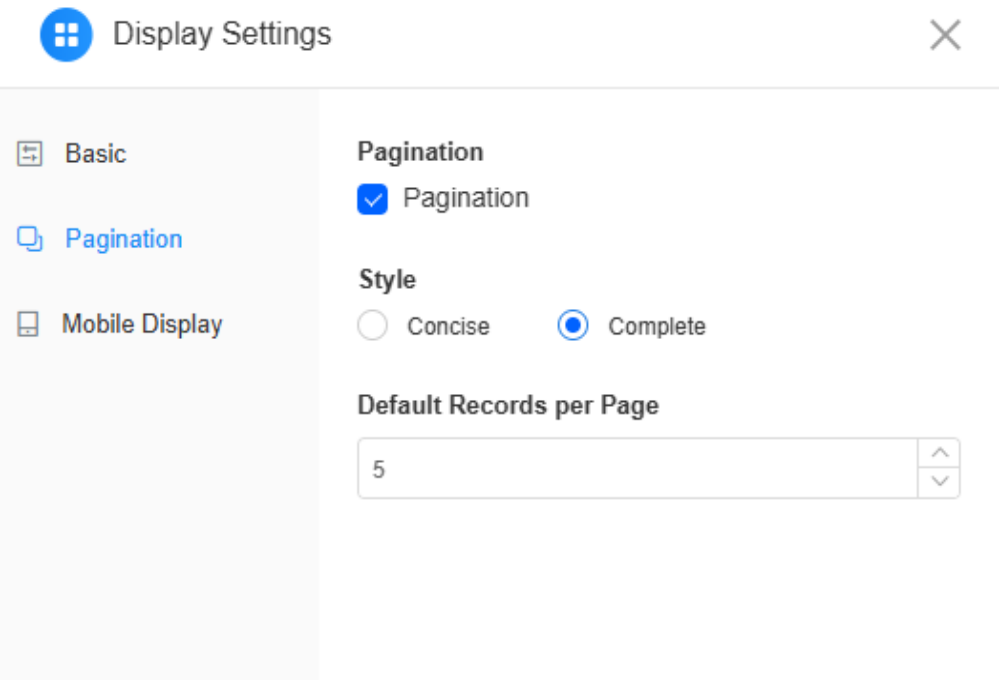


Table 5-2 Basic parameters

Parameter	Description
Operation Mode	Set the operation mode of the view table. <ul style="list-style-type: none">– Edit: You can create, export, or delete view table data.– Read-only: You can only read data in the view table.– Checkbox: You can select data in the view table.
Table View	Set the display of the view table. <ul style="list-style-type: none">– Header: Whether to display the table header.– Index: Whether to display row numbers. If selected, row numbers appear in the first column of the table and continue across pages. The sequence numbers can be sorted either in ascending or descending order.– Single-answer: If selected, a radio button appears to the left of each row, allowing you to choose only one row of data.– Multiple-answer: If selected, a checkbox appears before each row, allowing you to select multiple rows of data.
Row Height	Set the row height of the view table, for example, compact, medium, high, very high, and adaptive.

3. Choose **Pagination** to set the pagination style and number of records to be displayed in the view table.

Figure 5-10 View pagination settings



For example, if you set the pagination style to **Complete** with **5** records per page, the effect is shown in the following figure.

Figure 5-11 Effect



Table 5-3 Pagination parameters

Parameter	Description
Pagination	Whether data is displayed on multiple pages in the view table.
Style	You can set the page style to Concise or Complete .

Parameter	Description
Default Records per Page	Number of records displayed on each page. Value range: [1,100]

4. Choose **Mobile Display** and set the style of the view table displayed on the mobile client.

Figure 5-12 Collapsed company name

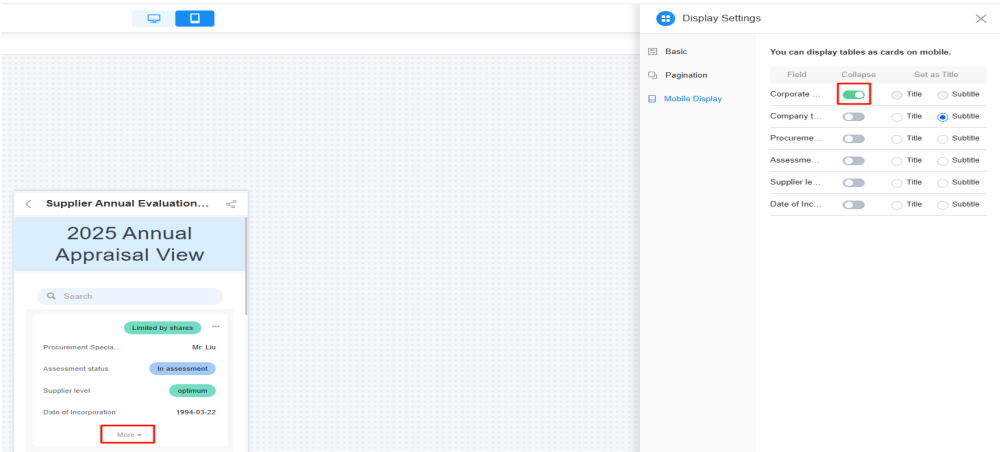


Figure 5-13 Effect of setting the company name as the main title

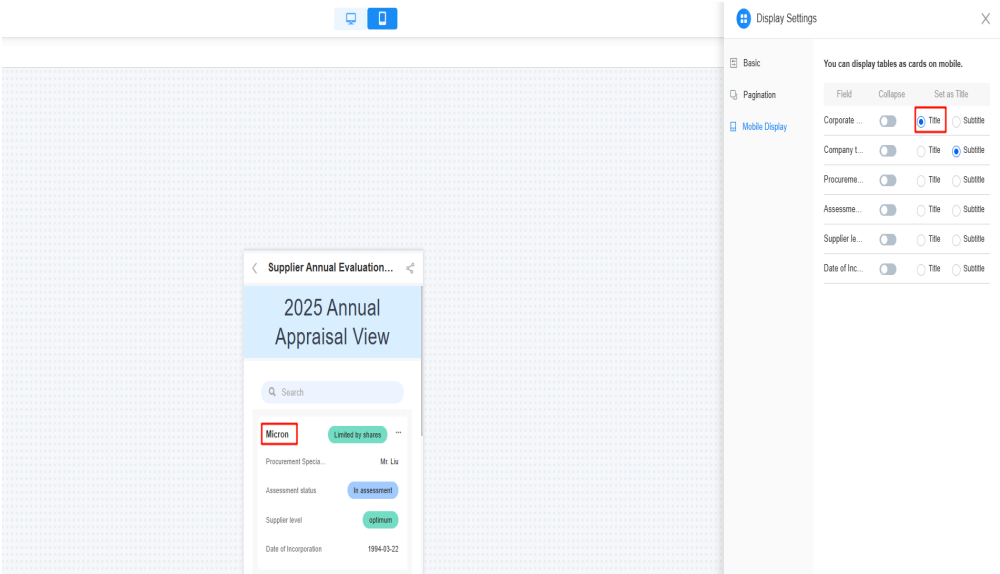
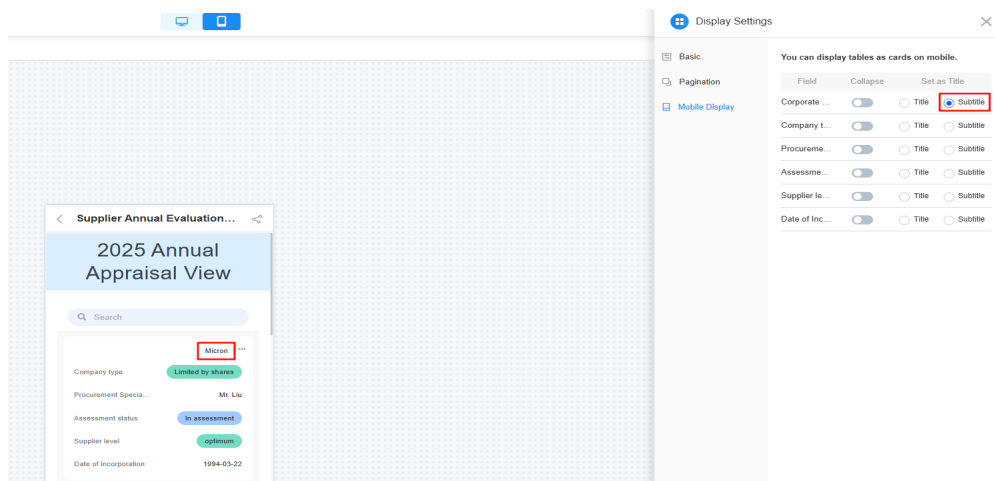


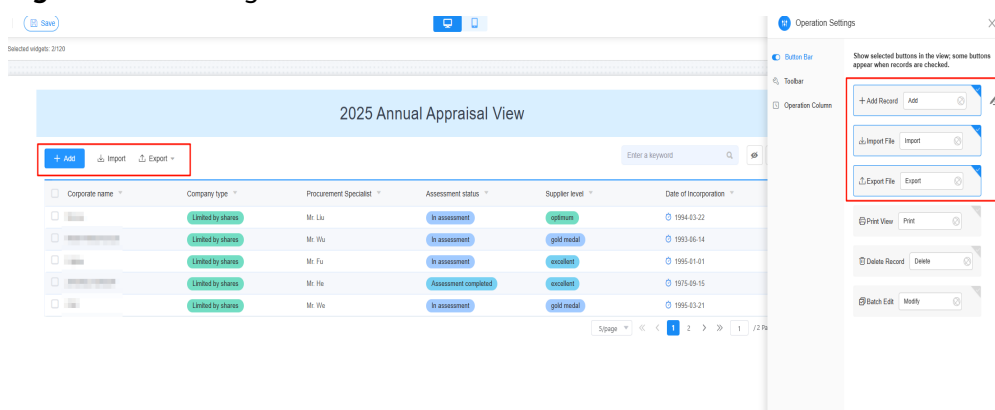
Figure 5-14 Effect of setting the company name as the subtitle



Step 6 Add operation buttons to the view.

1. On the menu bar on the right, choose **Operation Settings**.
2. Choose **Button Bar** and set the buttons displayed in the view operation bar.

Figure 5-15 Setting the button bar



3. Choose **Toolbar** and set the tools to be displayed in the view.

Figure 5-16 Setting the view toolbar

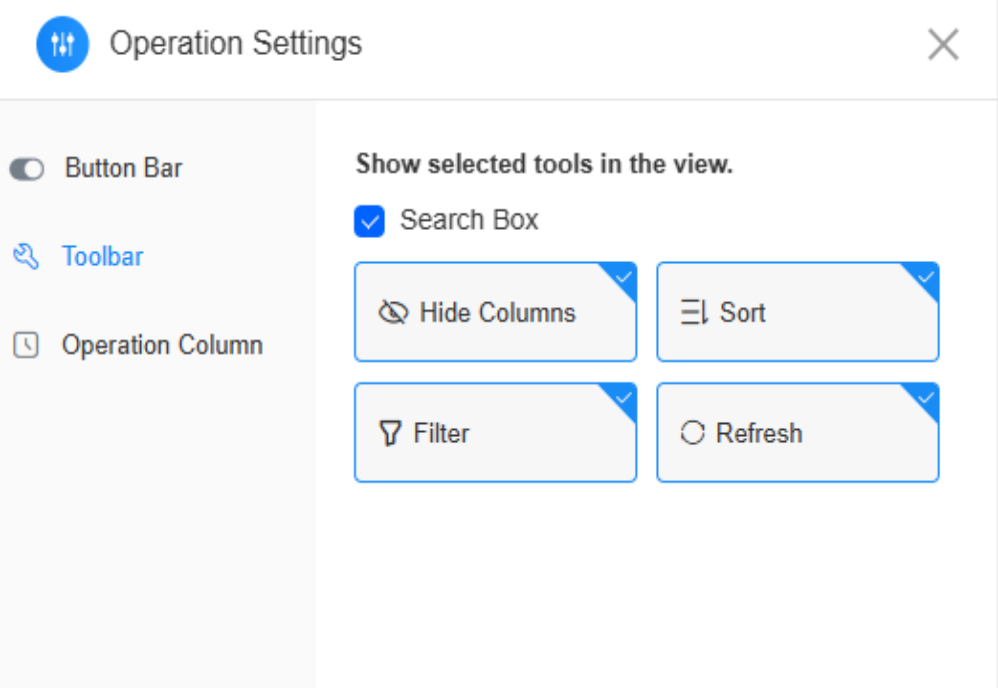


Figure 5-17 Effect



4. Choose **Operation Column** and set the operation buttons in the data row of the view.

Figure 5-18 Setting the operation buttons displayed in the view

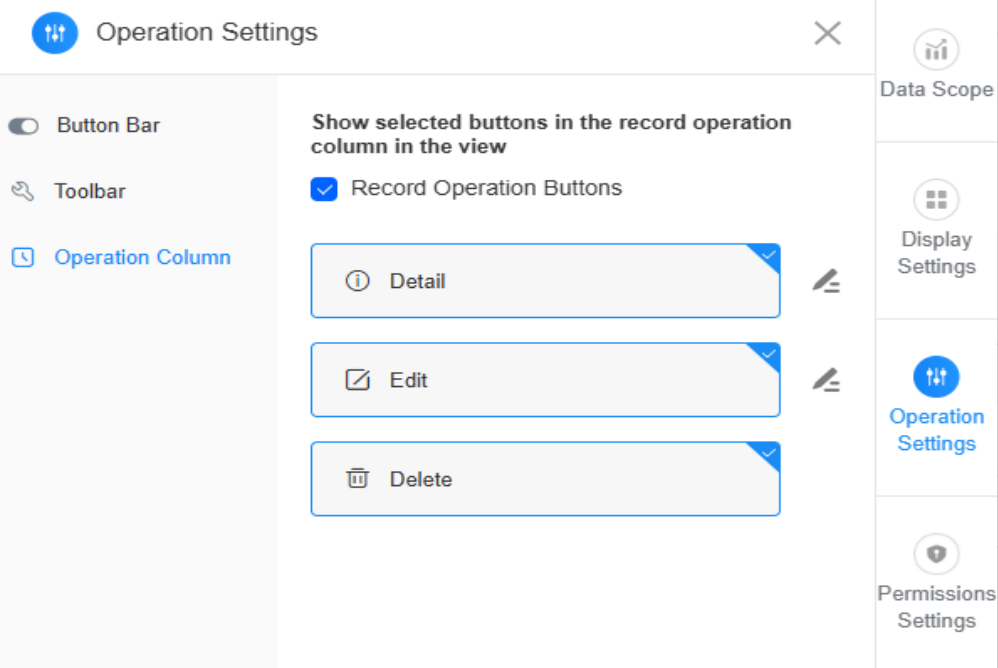


Figure 5-19 Effect



Step 7 Set operation permissions for the view.

1. On the menu bar on the right, choose **Permissions Settings**.
2. Set who can check the view table.

For example, if you set the view to be visible only to specific roles, like the enterprise member role, only users with that role can check the view.

Figure 5-20 Setting who can check the view table

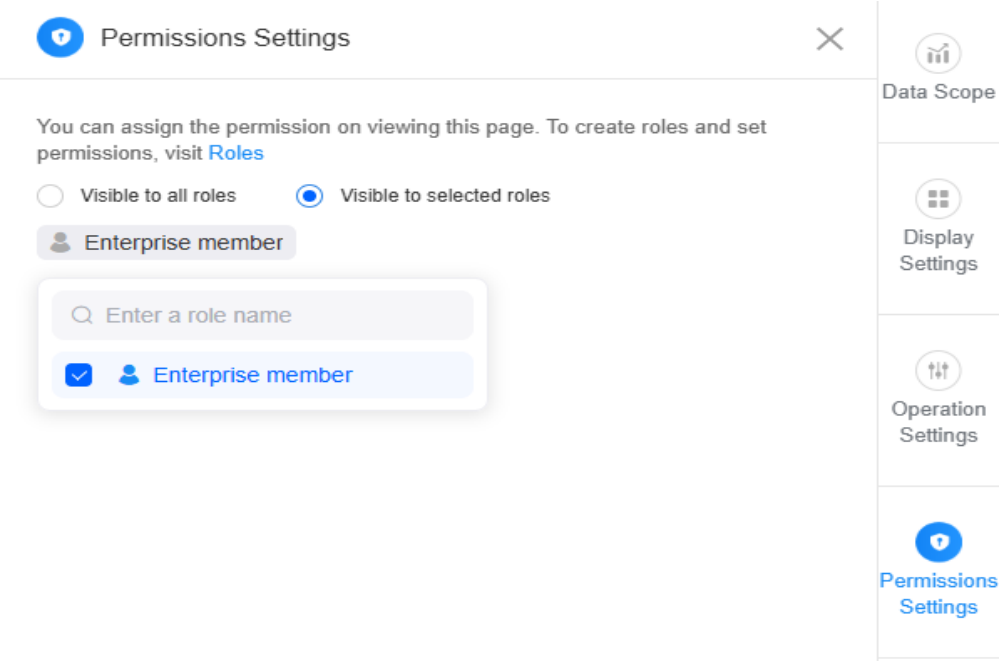


Table 5-4 Parameters for setting permissions

Parameter	Description
Visible to all roles	All roles in the configuration center can check the view form, including preset roles and custom roles. For details about roles, see Configuring Application Role Permissions .
Visible to selected roles	Only specified roles can view the view form.

3.
- After the settings are complete, click **Save** in the upper part of the page to save the view.

Step 8 Check whether the view meets the expectation.


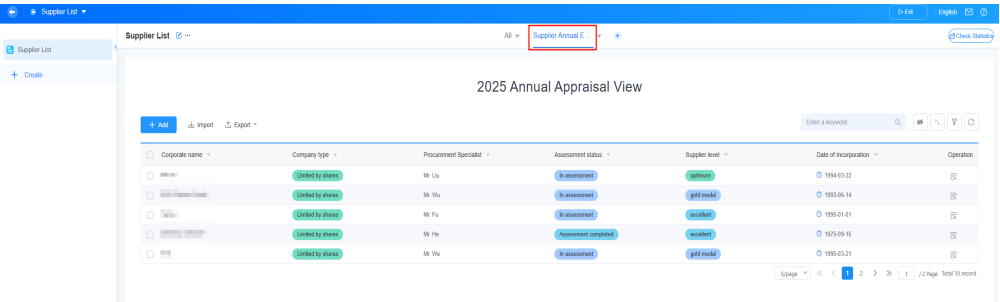
1.
- Click  in the upper left corner of the page to return to the application development page. You can view the created view.

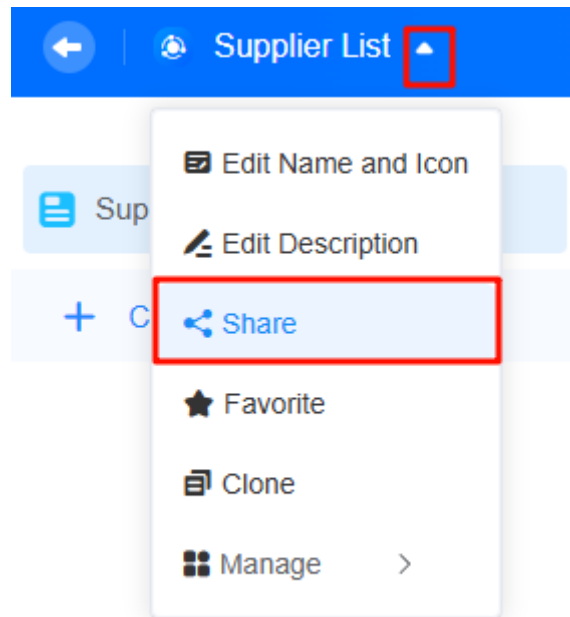
Figure 5-21 Viewing the created view



2.
- Click an operation button in the view to perform the corresponding operation.

3. Click  next to the application name and choose **Share**.

Figure 5-22 Sharing an application



4. Copy the application's access link and send it to a user (for example, Zhang San) with the enterprise member role. When the user opens the link, the "Supplier Annual Assessment View" will be displayed.

Figure 5-23 Copying the application link

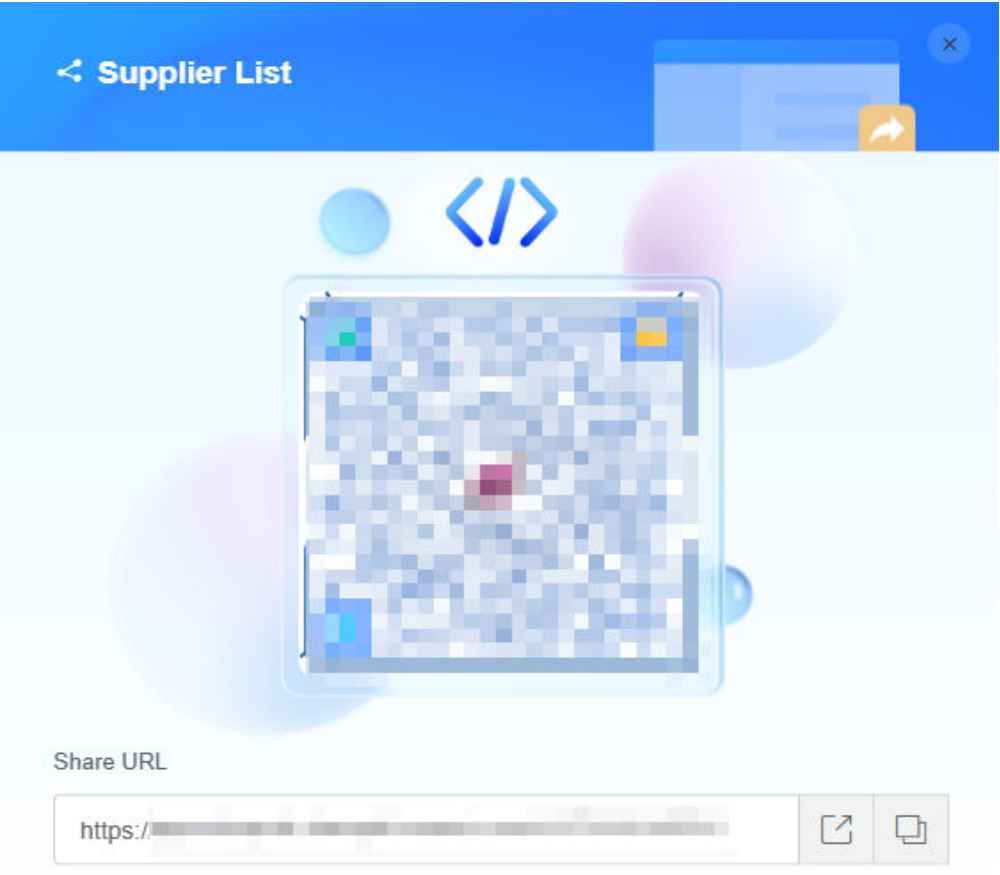
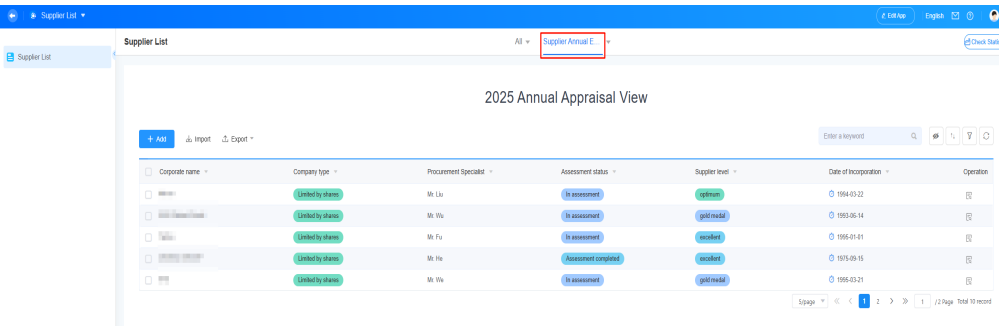


Figure 5-24 Displaying the Supplier Annual Assessment View




5.
- On the application development page, click  next to "Supplier Annual Assessment View" and choose **Share View** to obtain the view access address and share it with portal users.

Figure 5-25 Selecting Share View

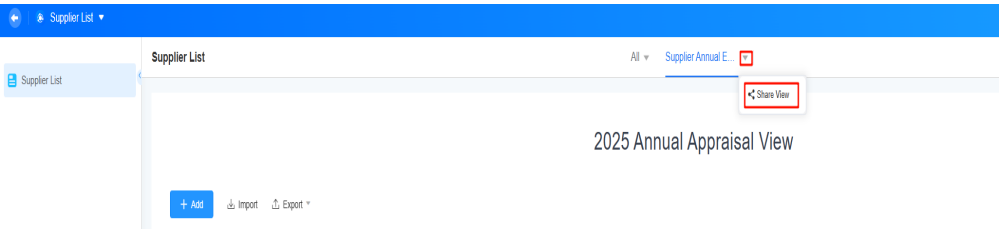


Figure 5-26 Obtaining the access address

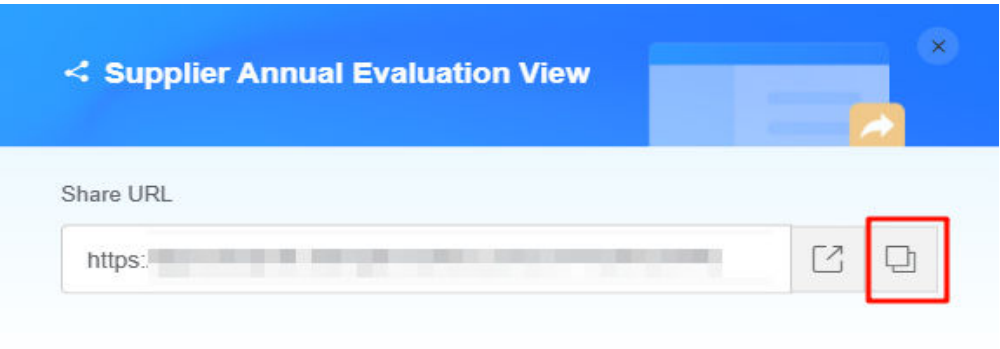
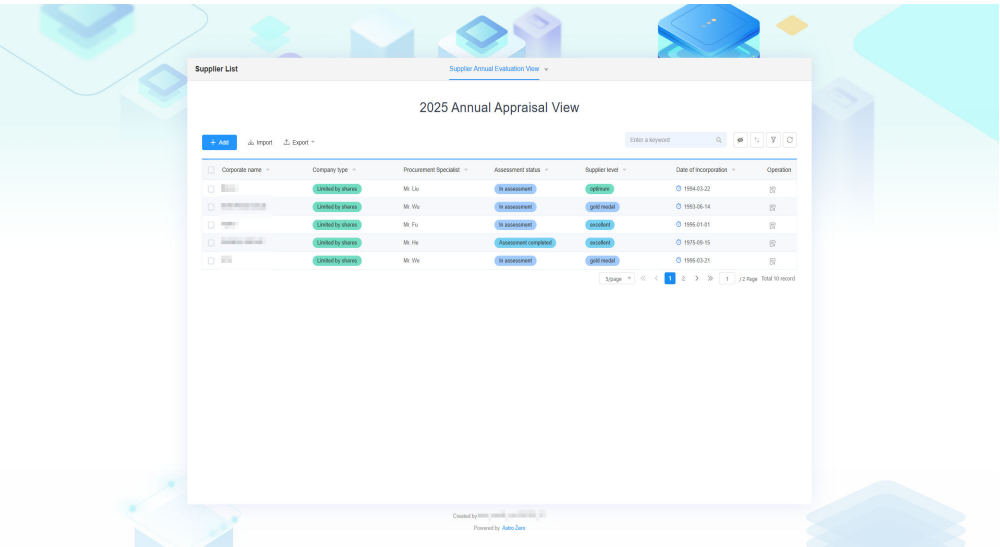


Figure 5-27 View effect viewed by portal users



----End

5.3 Managing Views

You can edit, share, clone, or delete views.

Renaming a View

You can rename a view as required. This helps users understand its new purpose.

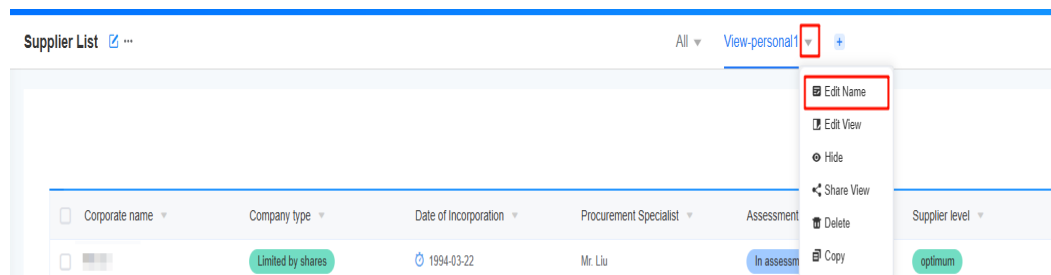
- Step 1

Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

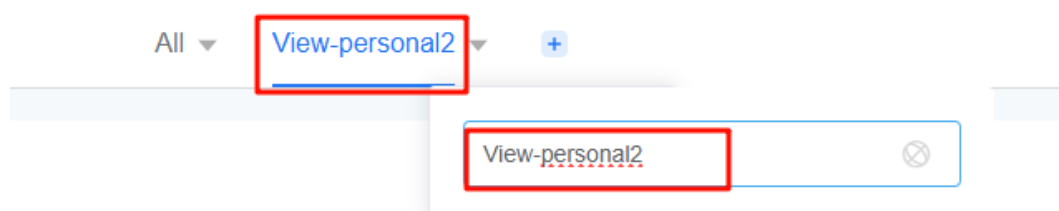
Step 3 Click ▼ next to **All** or a created view and choose to change the view name.

Figure 5-28 Changing the view name



Step 4 Enter a new name, and it takes effect instantly without needing to save.

Figure 5-29 Entering a new view name



Go back to the application editing page. The view name is updated.

Figure 5-30 Viewing the new view name



----End

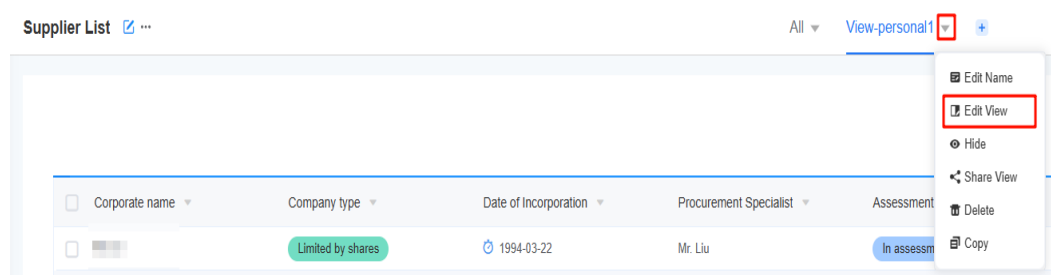
Editing a View

After creating a view, you can change its content, like updating the logic, data structure, or display effect.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

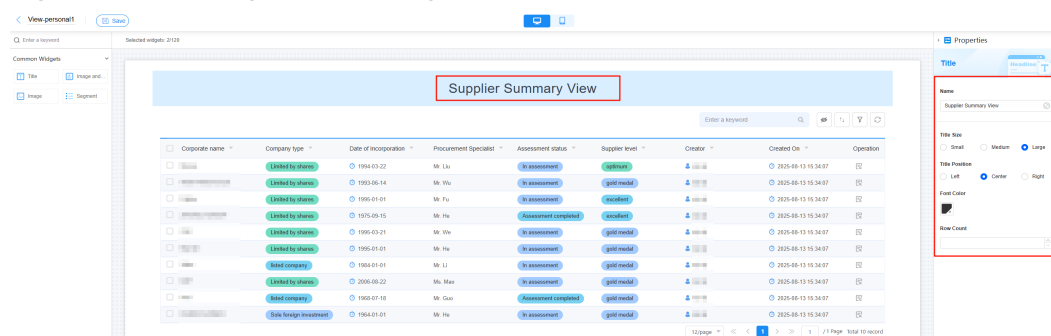
Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 Click ▼ next to **All** or a created view and choose to edit the view.

Figure 5-31 Entry for editing a view

Step 4 See [Creating a View](#) to edit the view.

For example, add a title widget to the view and set it by referring to [Figure 5-32](#).

Figure 5-32 Setting the title widget

Step 5 Click the save button in the upper part of the page.

Step 6 Check the modification effect.


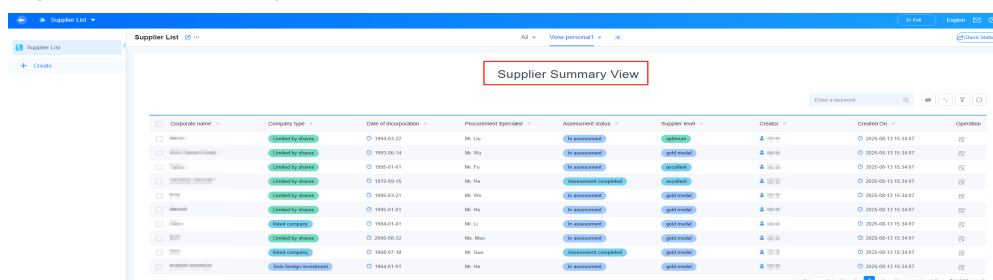
- Check the effect in the development environment. On the view editing page, click  to return to the application development page. Select the corresponding form to check the modification effect.

Figure 5-33 Checking the modification effect (development)


- Check the effect in the runtime environment. Click  next to "Personal view 1" and choose **Share View** to share the view access address with other users. After opening the link, other users can check the modified view, as shown in [Figure 5-36](#).

Figure 5-34 Selecting Share View

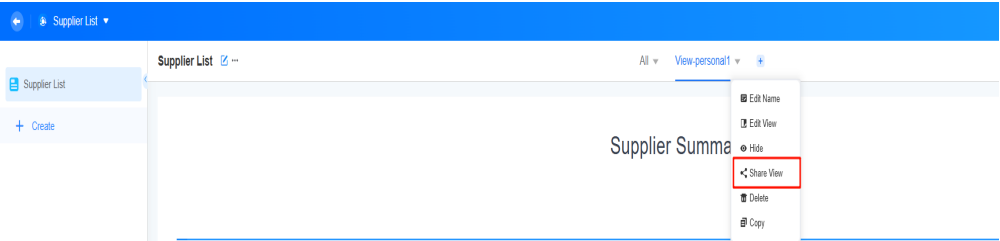


Figure 5-35 Obtaining the view access link

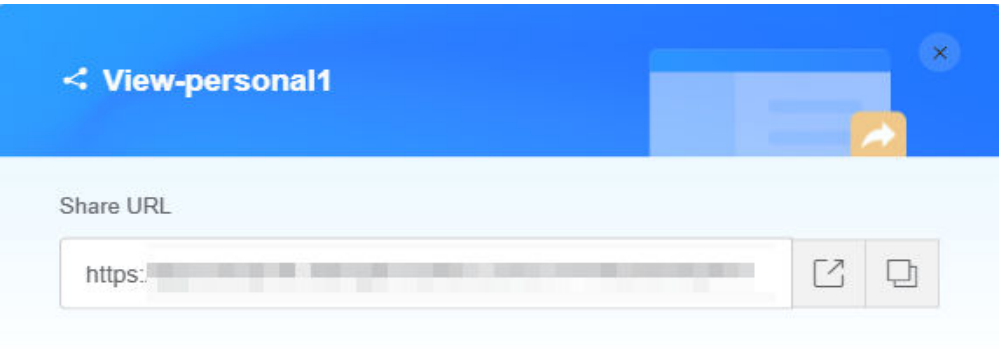


Figure 5-36 Checking the modification effect (runtime)



----End

Hiding a View

You can hide views with sensitive information like employee salaries or customer privacy, so only users with specific roles can access them.

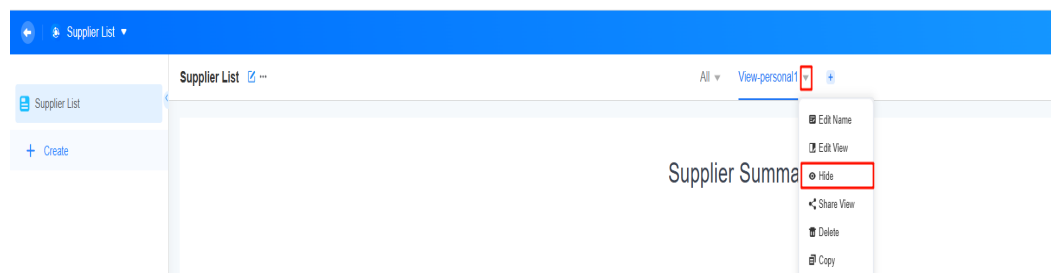
- Step 1

Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2

In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3

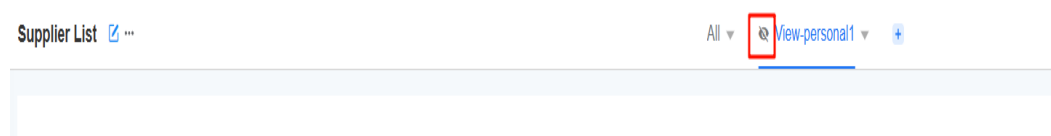
Click ▼ next to the target view and choose **Hide**.

Figure 5-37 Hiding a view



After the setting is successful, a hidden icon is displayed before the view, as shown in [Figure 5-37](#).

Figure 5-38 Viewing the hiding effect (development)



Step 4 Check the hidden view.


On the application development page, click  to return to the no-code workbench. Choose **All Apps** > **Mine**, move the cursor to the target application's ..., and choose **Share**. Share the application access address with other users. After other users open the link, "Personal view 1" cannot be viewed, as shown in [Figure 5-36](#).

Figure 5-39 Obtaining the application access link

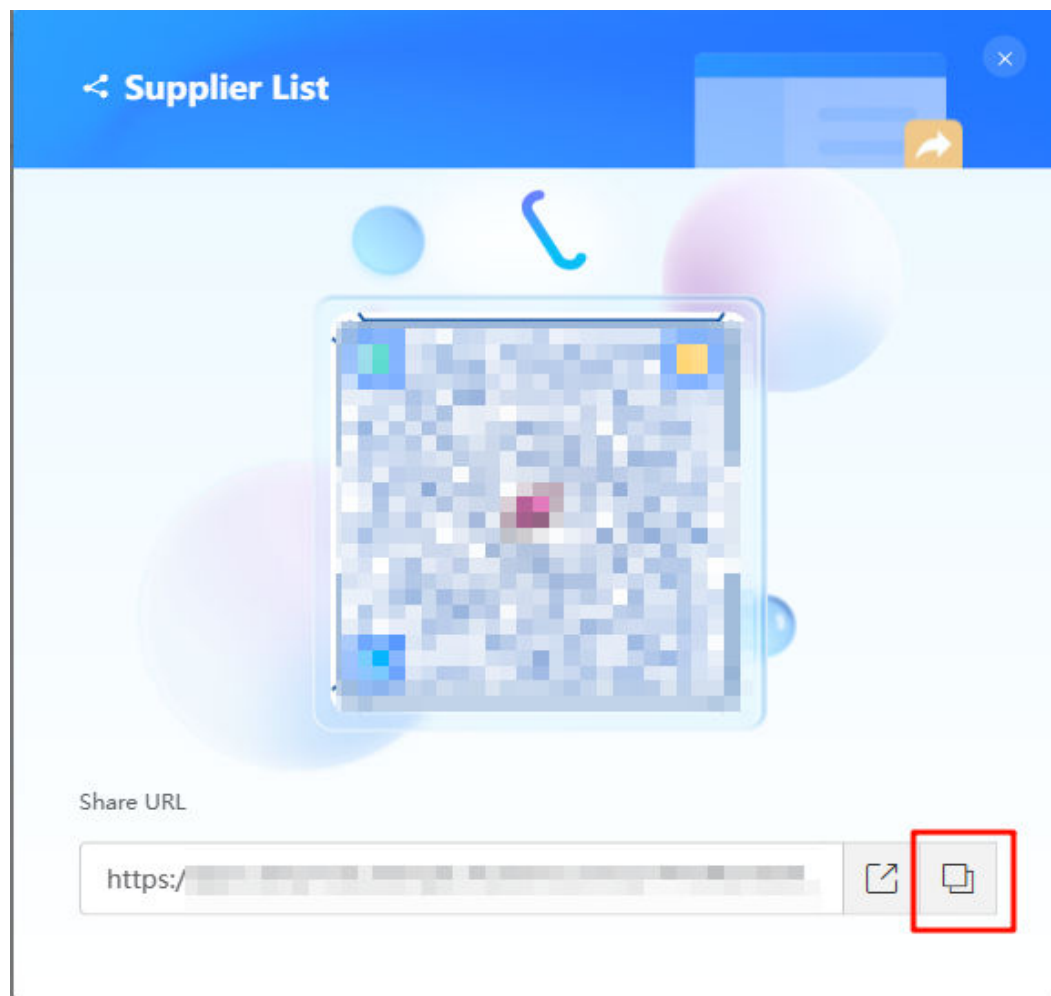


Figure 5-40 View after being hidden (runtime)



----End

Sharing a View

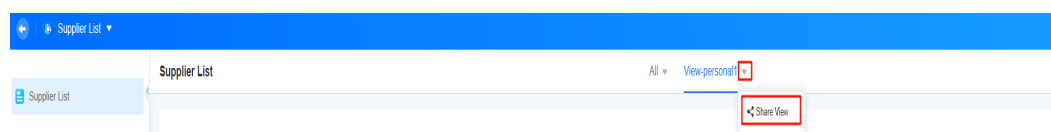
You can share a view with your team or others for cross-role data collaboration and sharing.

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, click the target application. The application development page is displayed.

Step 3 Click  next to the view to be shared and choose **Share View**.

Figure 5-41 Sharing a view (runtime)




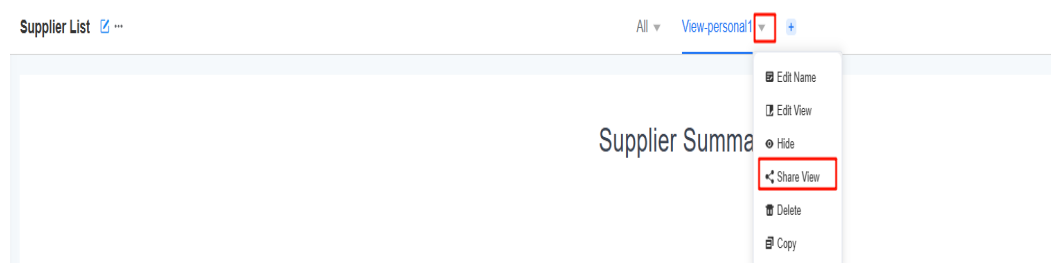

You can also click the edit button in the upper right corner of the application development page to go to the page for editing the application. On the application editing page, click  next to the view to be shared and select **Share View**.

Figure 5-42 Sharing a view (development)



Step 4 On the displayed page, click  to obtain the view access address and share it with others.


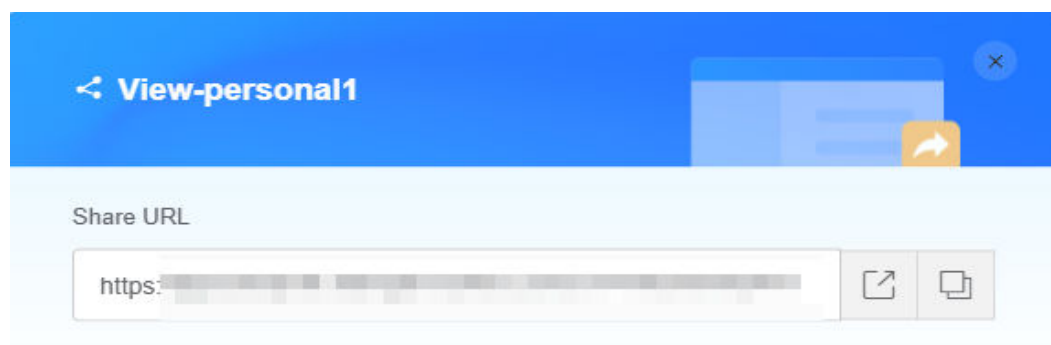
You can also click  to open the view in a new window.

Figure 5-43 Copying a link

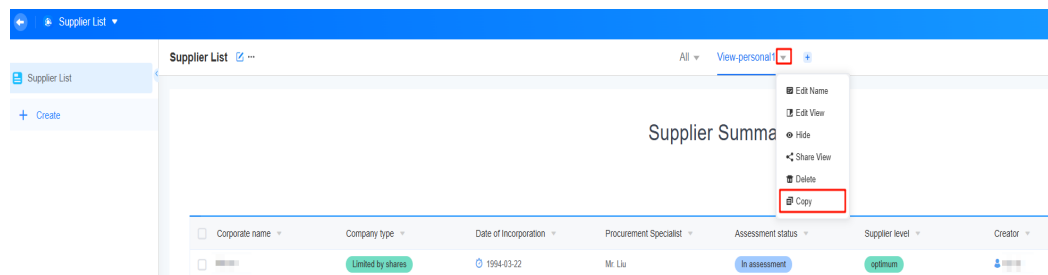


-----End

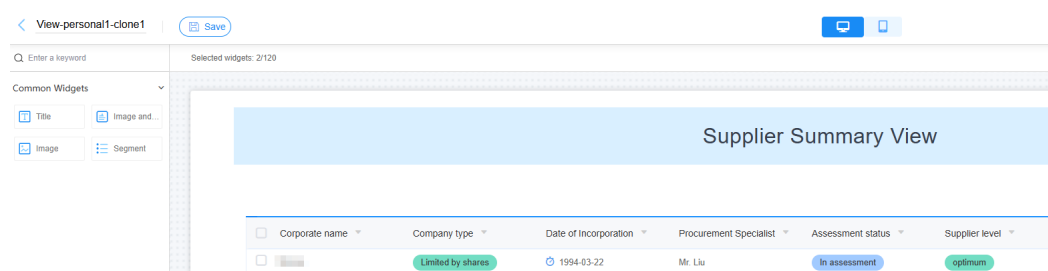
Cloning a View

If the service scenarios are similar, you can clone a view to create a new one quickly. When you clone a view, only the metadata structure is copied, not the instance data.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click ▼ next to the view to be cloned and choose to clone the view.

Figure 5-44 Cloning a view

After the clone is successful, the page for editing the cloned view is displayed.

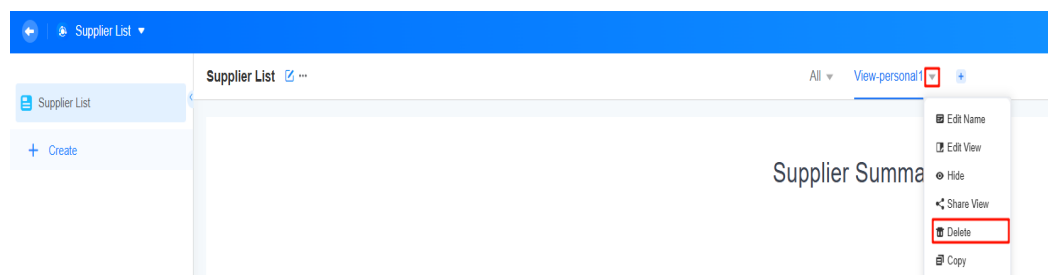
Figure 5-45 Viewing the cloned view page

----End

Deleting a view

If you do not use a view anymore, delete it. This frees up space and keeps your view list up-to-date.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click ▼ next to the view to be deleted and click the delete button.

Figure 5-46 Deleting a view

Step 4 In the displayed dialog box, confirm the deletion.

----End

6 Creating a Data Report

6.1 Creating a Data Report

You can create data reports and use widgets such as pie charts, bar charts, and totals to show data in different ways. This helps you check, study, and sum up the data.

Prerequisites

You have created a form and filled in data. For example, the supplier list form has collected the following 12 records.

Figure 6-1 Obtained data

Supplier List

+

Add

↓

Import

↓

Export

✕

Delete

↺

Modify

Enter a keyword

🔍

🔍

🔍

🔍

<input type="checkbox"/>	Corporate name	Company type	Date of incorporation	Procurement Specialist	Assessment status	Supplier level	Creator	Created On	Operation
<input type="checkbox"/>	🏢	Limited by shares	📅 1994-03-22	Mr. Liu	In assessment	optimum	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 1993-06-14	Mr. Wu	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 1995-01-01	Mr. Fu	In assessment	excellent	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 1975-09-15	Mr. He	Assessment completed	excellent	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 1995-03-21	Mr. Ye	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 1995-01-01	Mr. He	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	listed company	📅 1984-01-01	Mr. Li	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Limited by shares	📅 2006-08-22	Ms. Mao	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	listed company	📅 1993-07-18	Mr. Guo	Assessment completed	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑
<input type="checkbox"/>	🏢	Sole foreign investment	📅 1964-01-01	Mr. He	In assessment	gold medal	👤	📅 2025-08-13 15:34:07	🔍 📄 🗑

12/page

<<

<

>

>>

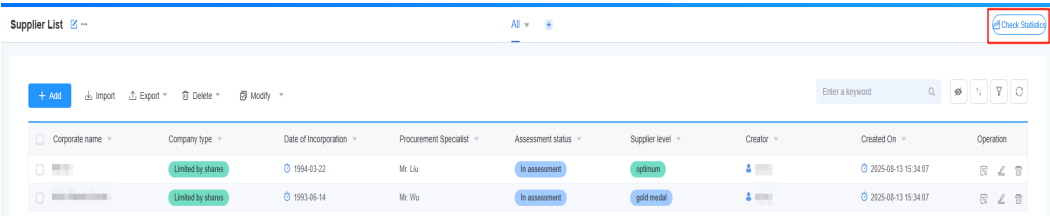
1

/ 1 page Total 10 records

Creating a Data Report

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** In the upper right corner of the page, click **Check Statistics**.

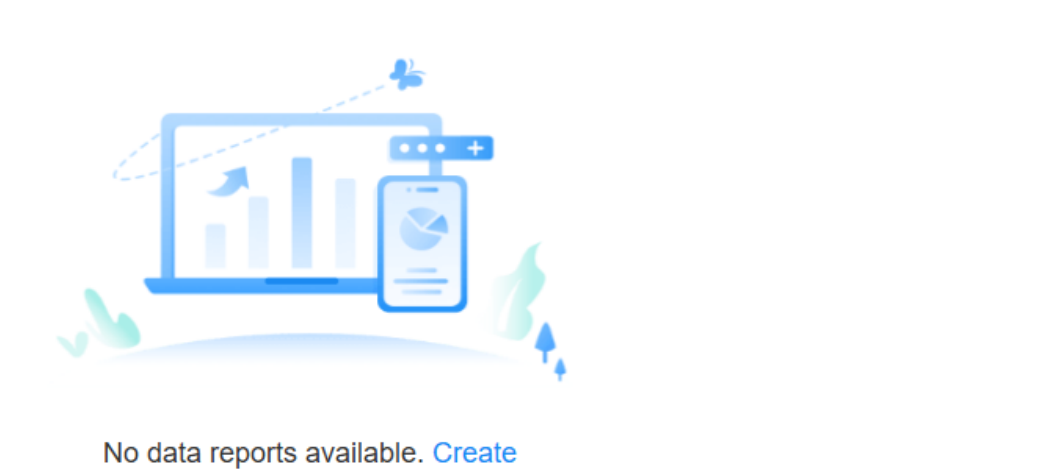
Figure 6-2 Clicking Check Statistics



Step 4 If no report has been created, the page shown in **Figure 6-3** is displayed. Click **Create**.

If a report has been created and needs to be edited, click ▼ next to the report and choose to edit it.

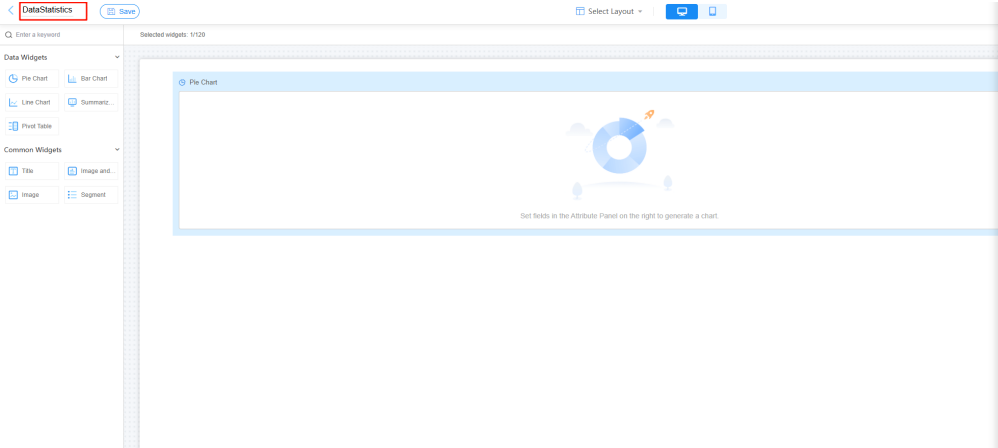
Figure 6-3 Entry for creating a data report



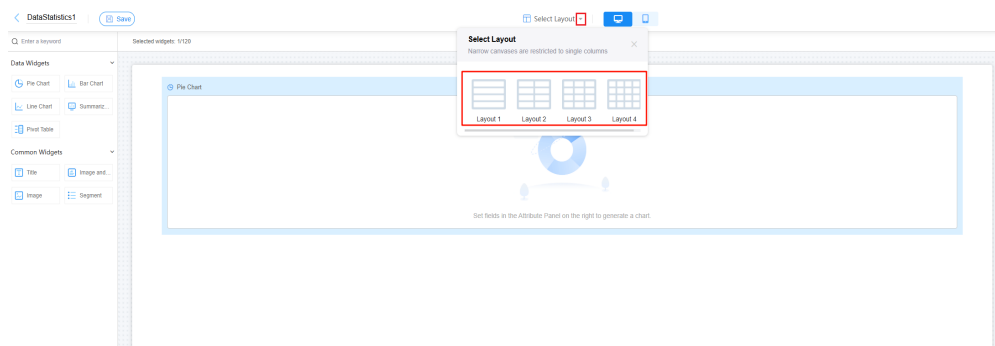
Step 5 Configure the report.

1. In the upper left corner of the page, set the report name.

Figure 6-4 Setting the report name

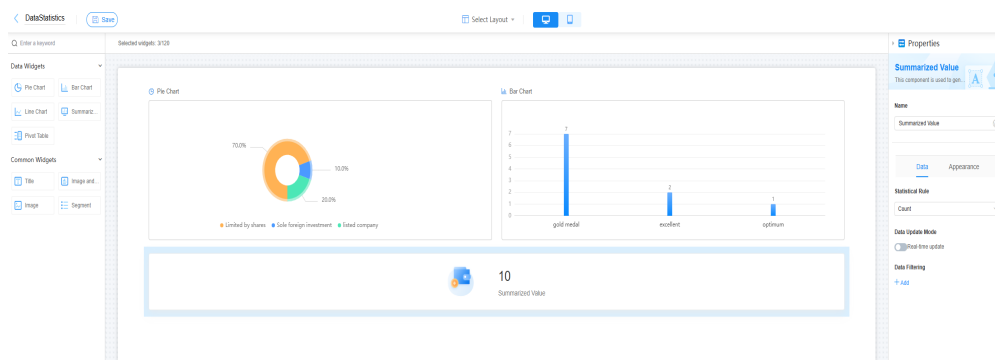


2. In the upper middle of the page, click **Select Layout** to select the desired form layout.

Figure 6-5 Selecting a layout

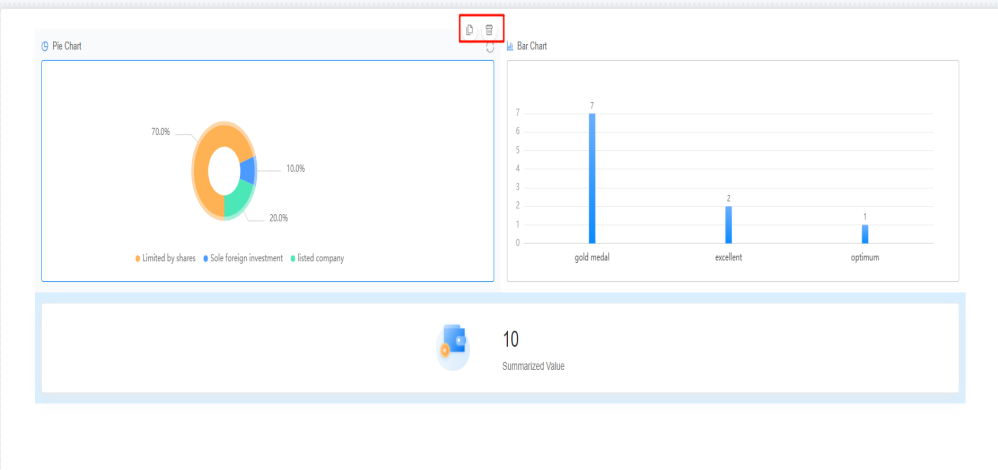
3. In the upper middle area, select a terminal view type.
Choose PC or mobile view so the process works best on each device.
4. Drag a widget from the left pane to the middle area by referring to [Adding Widgets to a Report](#), and set widget properties by referring to [Setting the Properties of Widgets on Data Reports](#).

As shown in [Figure 6-6](#), the **Pie Chart**, **Bar Chart**, and **Summarized Value** widgets are used, and widget properties are configured based on the data entered in the form.

Figure 6-6 Configuring a widget

When you hover the cursor over a widget, the icon for copying the widget is displayed. When the number of widgets on the page is greater than one, the icon for deleting the widget is also displayed.

Figure 6-7 Widget operation icons



5. Click **Save** in the upper right corner of the page.

Step 6 Set the data range.

- 1. On the right menu bar, choose **Data Scope**.
- 2. Set the data source and data obtaining permission.

Figure 6-8 Setting the data range

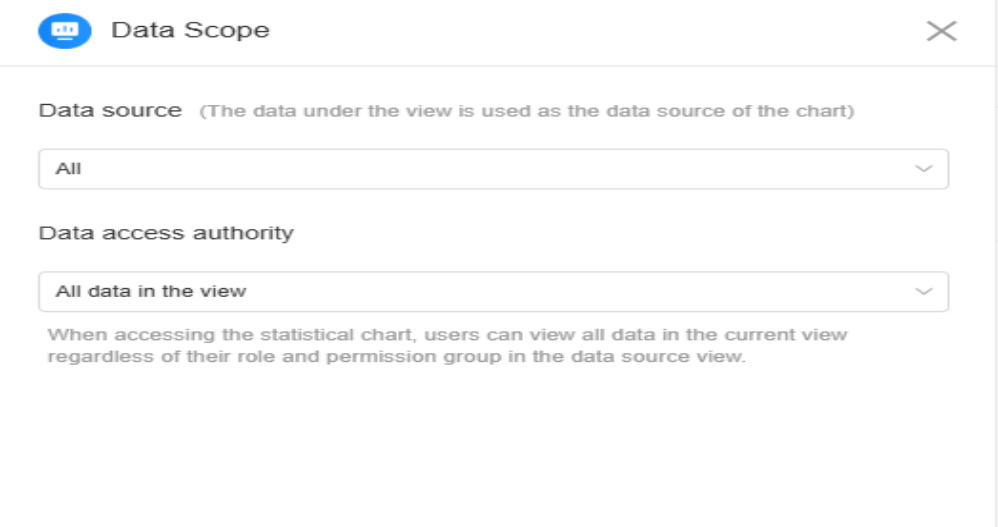


Table 6-1 Data range parameters

Parameter	Description
Data source	Select data in a view as the data source of the data report.

Parameter	Description
Data access authority	<div>Set the permission to obtain data.</div> <div><div><div>– Data permission of the inherited view: When a user accesses a statistical chart, the user can view only the data on which the user has permission based on the role permission group to which the user belongs in the data source view.</div><div>– All data in the view: When a user accesses a statistical chart, the user can view all data in the current view regardless of the role permission group to which the user belongs in the data source view.</div></div></div>

3. After the editing is complete, click **Save** in the upper left of the page to save the settings.

Step 7 Set the access permission for the data report.

1. On the menu bar on the right, choose **Permissions Settings**.
2. Set the permission to view the data report.

Figure 6-9 Setting permissions

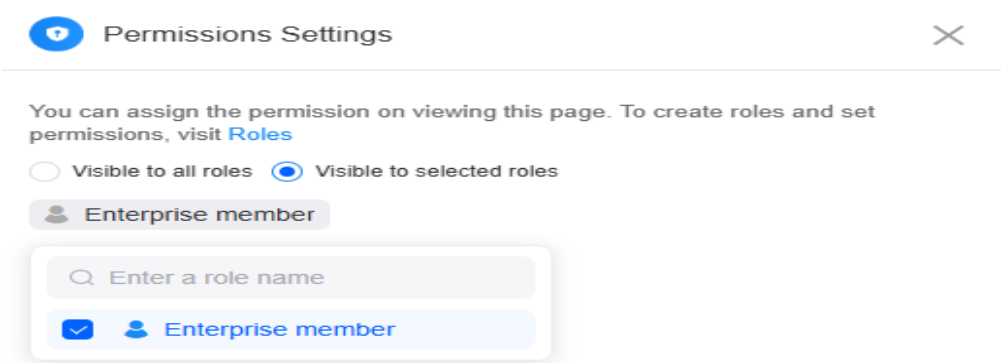


Table 6-2 Parameters for setting permissions

Parameter	Description
Visible to all roles	All roles in the configuration center can check the view form, including preset roles and custom roles.
Visible to selected roles	Only specified roles can view the view form.

3. After the editing is complete, click **Save** in the upper left of the page to save the settings.

Step 8 Check whether the data report meets the expectation.


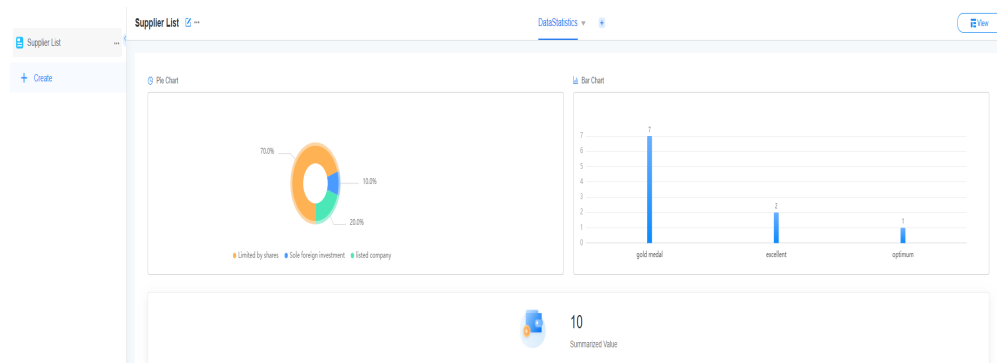
1. Click  in the upper left corner of the page to return to the application development page.
2. Select the corresponding form and click **Check Statistics** to view the created data report.

Figure 6-10 Viewing the data report




3. Click  next to "Data Statistics" and choose **Share Statistics** to obtain the access link of the data report.
4. Copy the access link of the data report and send the link to a user whose role is enterprise member. The user can view the data report after opening the link.

Figure 6-11 Copying the access link of the data report

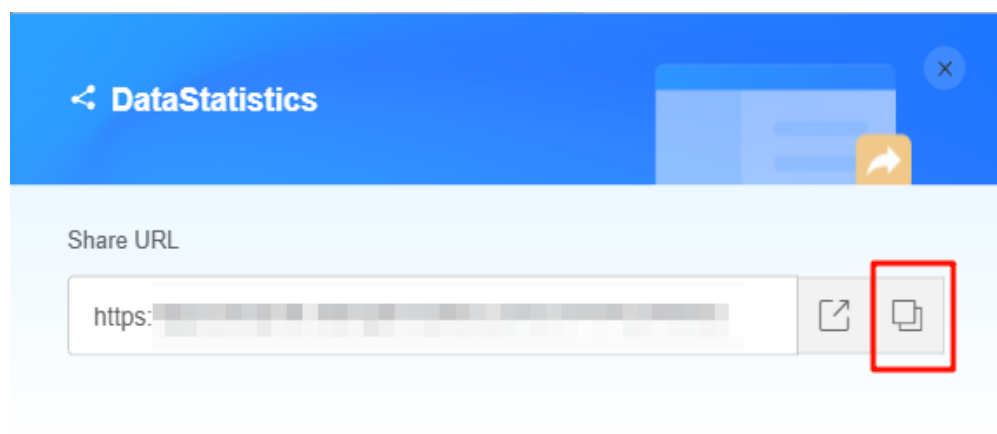
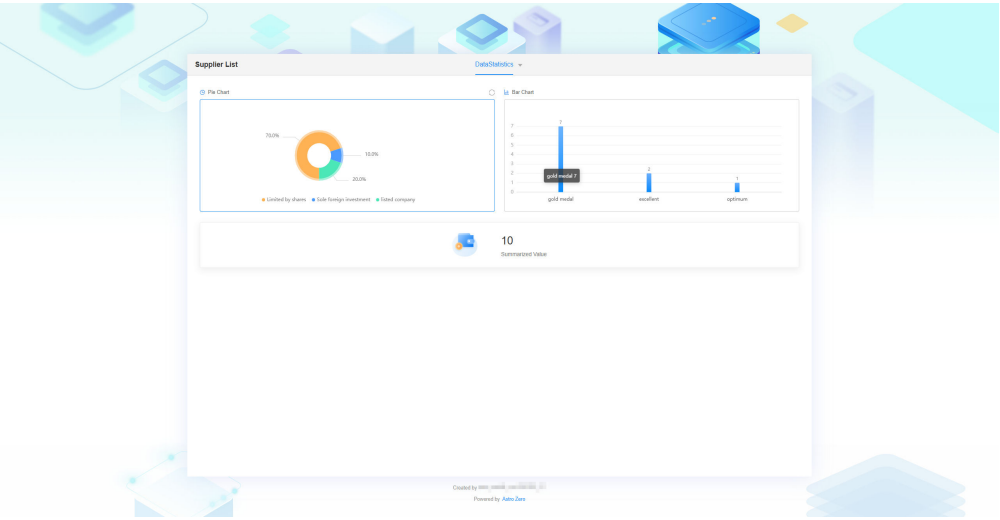


Figure 6-12 Data report displayed



----End

6.2 Adding Widgets to a Report

Report Widget Classification

There are data widgets and common widgets. For details, see [Table 6-3](#).

Table 6-3 Preset widget categories

Widget Category	Name	Description
Data widgets	Pie chart	This widget shows the proportion of data, especially useful when there are few data categories. Each sector in the pie chart represents a data category, with its size indicating the category's proportion of the total data set.
	Bar chart	This widget compares different data categories. In the bar chart, the length of each rectangle corresponds to the data value of the category.
	Line chart	This widget shows data trends by connecting data points to form one or more lines. This widget is especially useful for displaying trends and periodic changes.
	Summarized value	This widget calculates the total of a specific field or the number of records in a form.

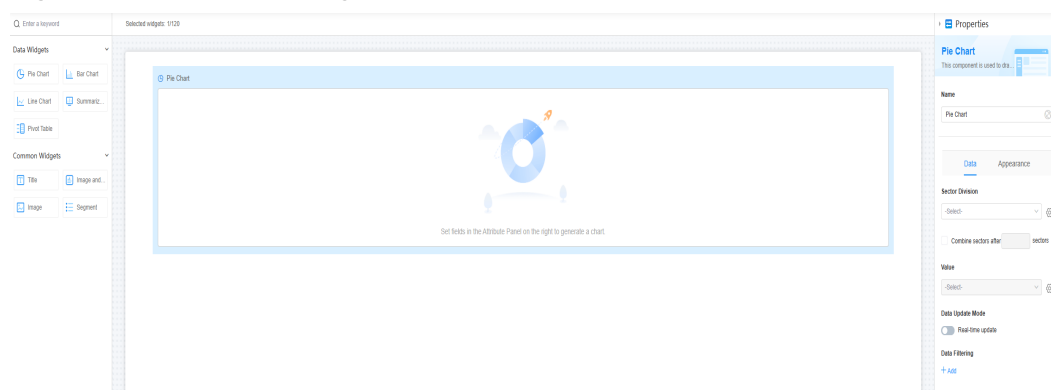
Widget Category	Name	Description
	Pivot table	This widget classifies and summarizes data across different dimensions. Set multiple dimensions (rows and columns) to display target values within each dimension.
Common widgets	Title	This widget displays the page title.
	Image and text	This is a web widget that can display rich texts.
	Image	This widget displays images on pages.
	Segment	This widget is usually used to describe the following part, or divide the form into different parts to make the structure clearer.

6.3 Setting the Properties of Widgets on Data Reports

6.3.1 Setting the Properties of the Pie Chart Widget

This widget shows the proportion of data, especially useful when there are few data categories. Each sector in the pie chart represents a data category, with its size indicating the category's proportion of the total data set.

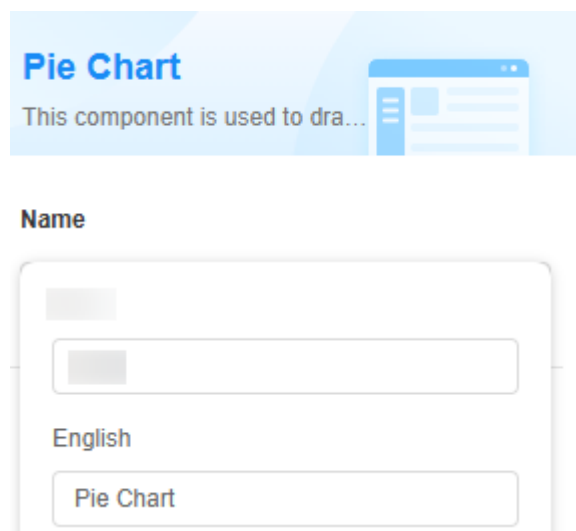
Figure 6-13 Pie chart widget



Name

Set the widget name shown to users. Click  to set Chinese and English names.

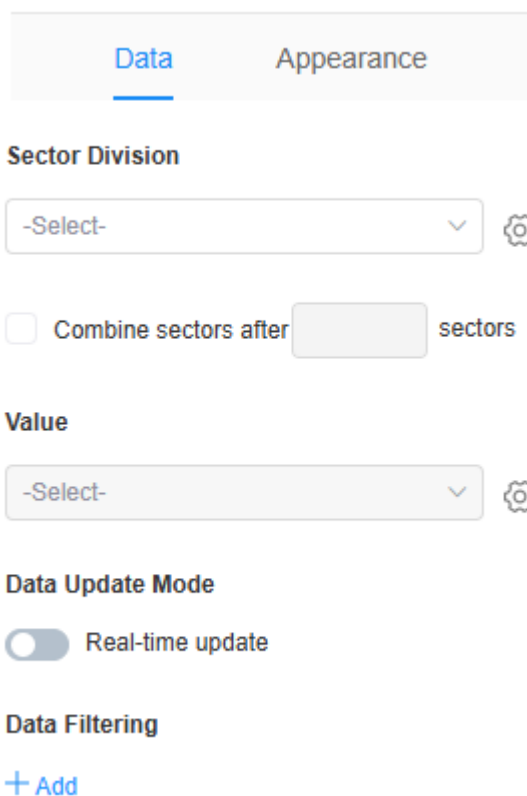
Figure 6-14 Setting the widget name (Chinese and English)



Data

Set the data source of the widget.

Figure 6-15 Data




- **Sector:** Select fields as the sector fields of the pie chart. Click  to set whether to merge the same dimension names and whether to collect statistics on empty values.
- **Sector x:** specifies the number of the sector to be combined into another sector. For example, the combination starts from the fifth sector. The following figure shows the effect before and after the combination.

Figure 6-16 Uncombined

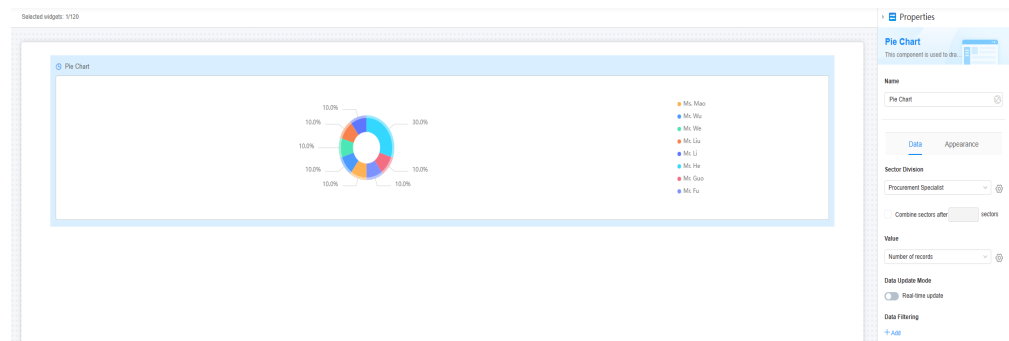
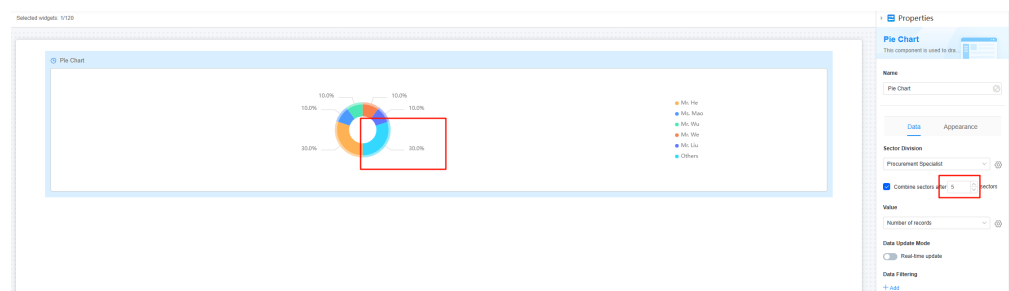


Figure 6-17 Combined




- **Value:** Select the field whose value is to be displayed. After the setting, click  to set the value summary mode (such as sum, maximum value, and minimum value) and whether to display the pie chart when the sector data is 0.
- **Data update mode > Real-time update:** Whether the data in the chart needs to be updated in real time.
- **Real-time update interval:** Set the interval at which the data in the chart is updated. This parameter needs to be set only when the real-time update function is enabled.
- **Data Filtering:** Click **+Add** to set filter criteria. You can collect data based on the criteria. For example, if you filter the data whose supplier level is gold. See [Figure 6-19](#).

Figure 6-18 No filter criteria added

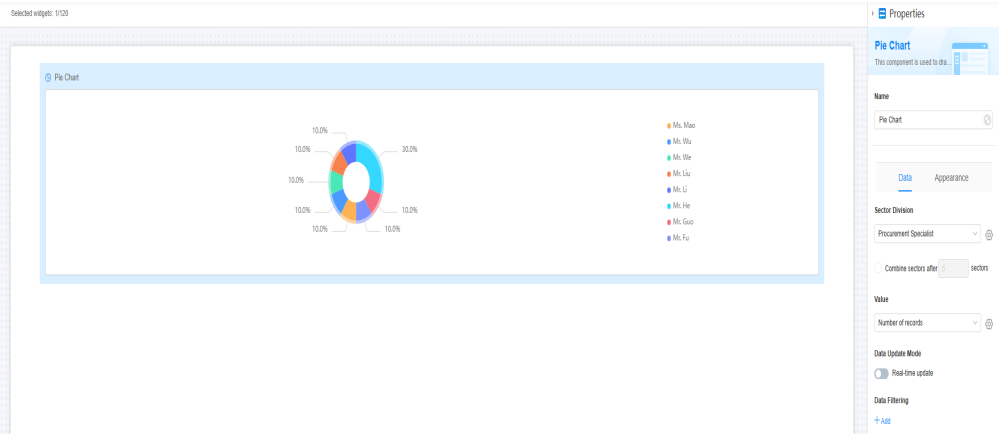
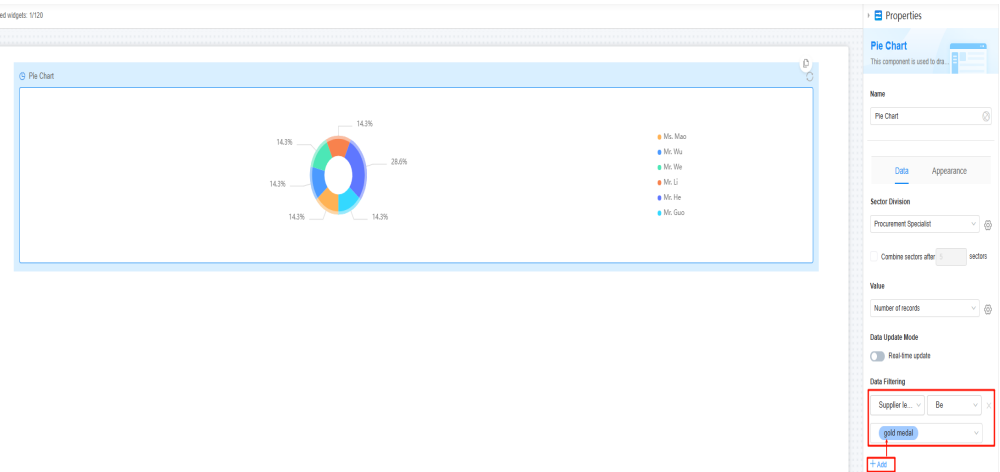


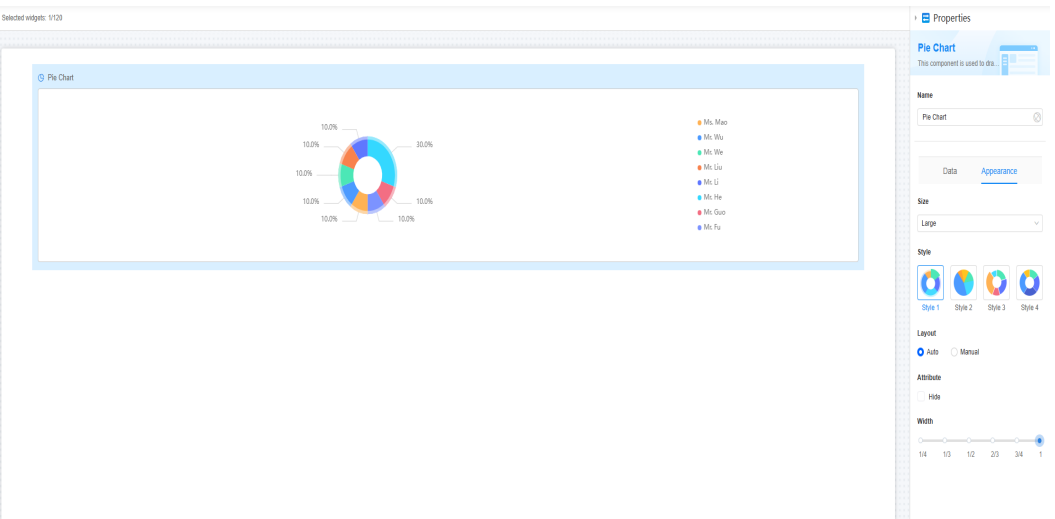
Figure 6-19 Filter criteria added



Appearance

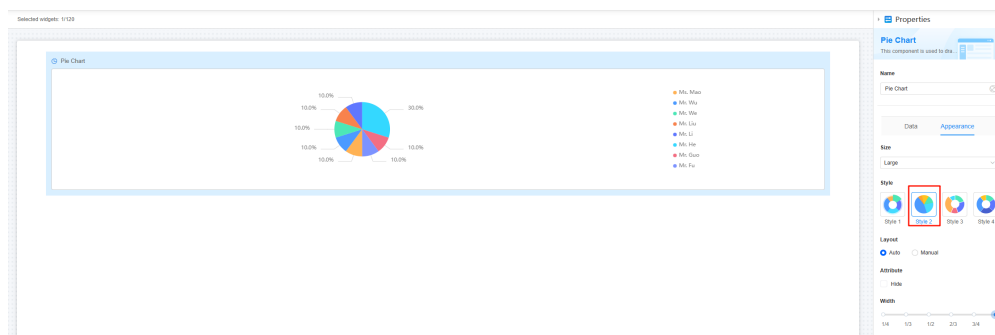
Set the appearance and style of the pie chart.

Figure 6-20 Appearance



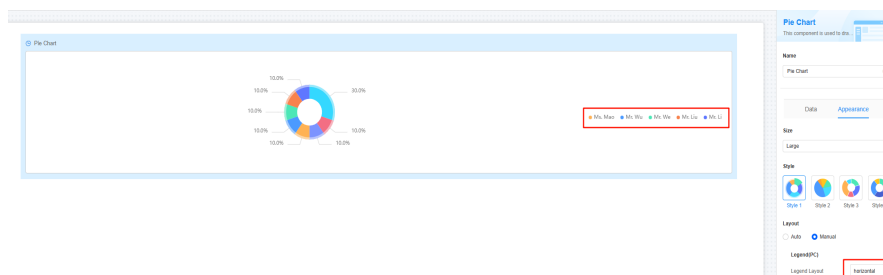
- **Size:** Set the size of the pie chart, for example, large, medium, or small. The default value is **Large**.
- **Style:** Select the chart style. The default value is **Style 1**.

Figure 6-21 Effect of setting the chart style to style 2



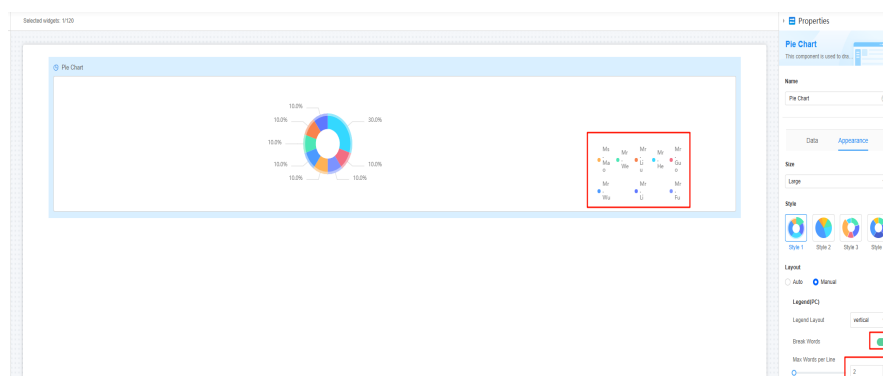
- **Layout:** Select the layout mode of the widget. The options are **Auto** and **Manual**. The default value is **Auto**. When **Manual** is selected, you can perform the following operations as required:
 - **Legend layout:** Set the layout of the legend, for example, vertical or horizontal. The default value is **vertical**.

Figure 6-22 Horizontal style



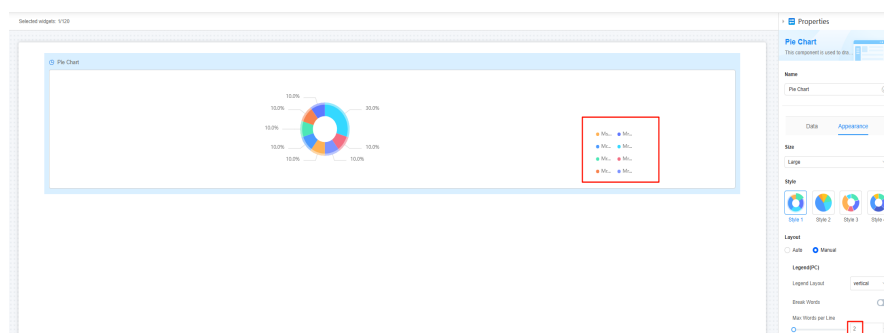
- **Break words:** Whether to enable tag line feed. After this function is enabled, if the number of characters in a label exceeds the maximum number of characters in a single line, the label is automatically wrapped.

Figure 6-23 Break words



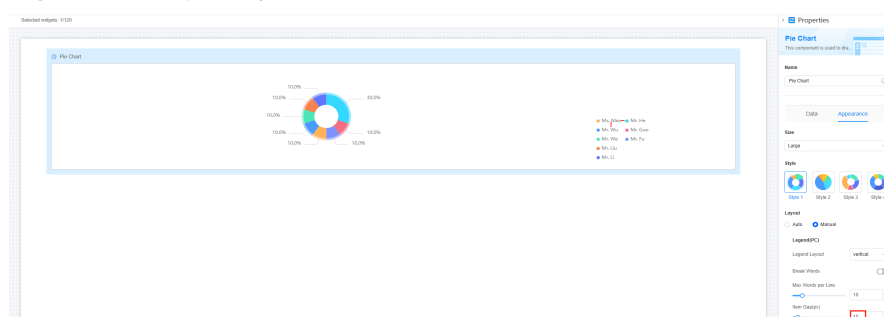
- **Maximum number of characters in a single line:** The value range is [1, 50].

Figure 6-24 Two characters displayed in a single line



- Item gap: Spacing between legend list items, in pixels.

Figure 6-25 Spacing between items



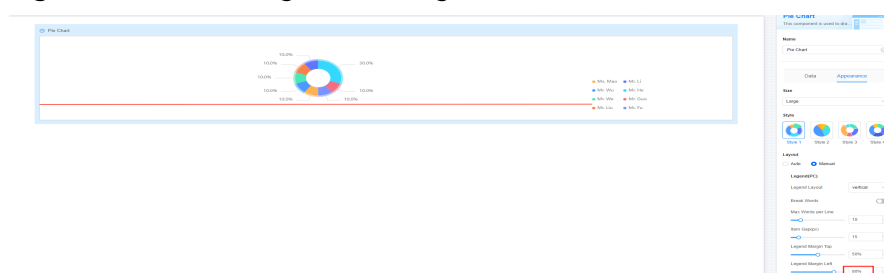
- Legend position (top margin): Set the percentage from the legend to the top of the widget border.

Figure 6-26 Top margin of the legend



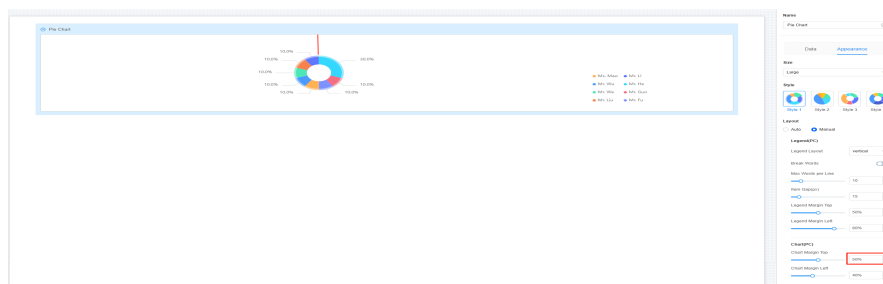
- Legend position (left margin): Set the percentage of the legend to the left of the widget border.

Figure 6-27 Left margin of the legend



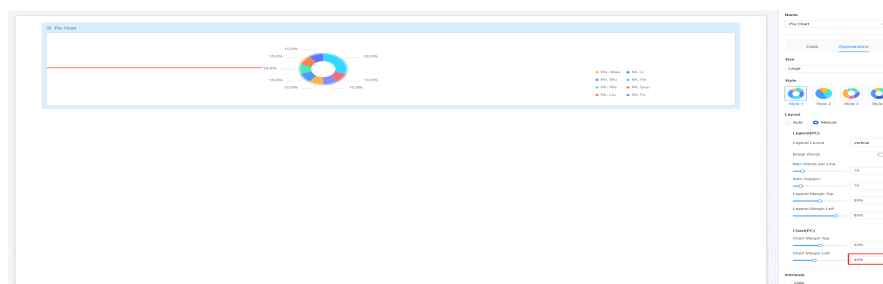
- Chart position (top margin): Set the percentage from the chart to the top of the widget border.

Figure 6-28 Top margin of a chart



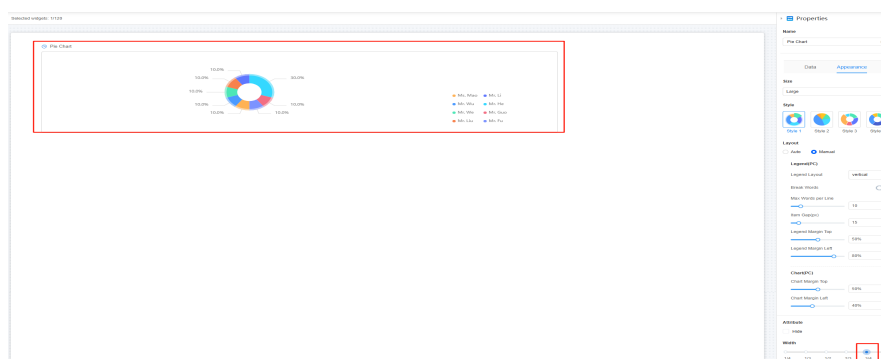
- Chart position (left margin): Set the percentage from the chart to the left of the widget border.

Figure 6-29 Chart position



- Conditions: If you check the **Hide** option, the widget is hidden on the page.
- Width: Ratio of the widget box width to the page width. Adjust the width to optimize the layout and display of the widget on the page, improving overall appearance and usability.

Figure 6-30 Setting the widget width



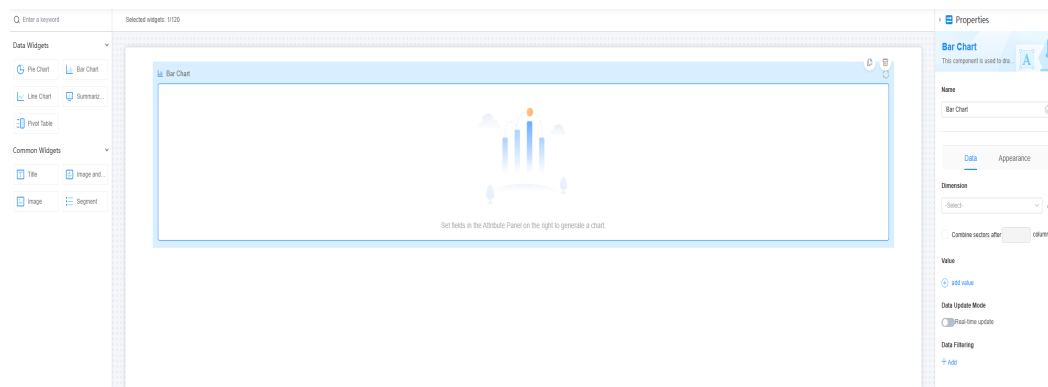
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.

- 1: Widget is full page width (default).

6.3.2 Setting the Properties of the Bar Chart Widget

This widget compares different data categories. In the bar chart, the length of each rectangle corresponds to the data value of the category.

Figure 6-31 Bar chart



Name

Set the widget name shown to users. Click  to set Chinese and English names.

Figure 6-32 Setting the widget name (Chinese and English)



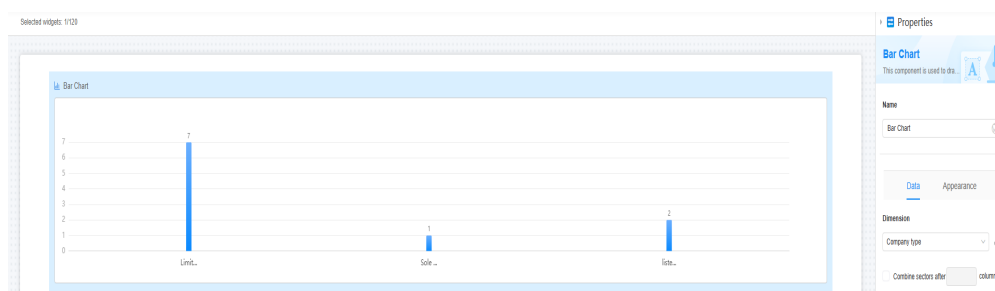
Data


Set the data source of the widget.

Figure 6-33 Data

- **Dimension:** Select a field in the table as the dimension field of the bar chart. The bar chart can use the option fields of the matrix table as the bar chart dimension, and each level is displayed as a value field of the bar chart.

Figure 6-34 Dimension



Click  next to **Dimension** and set the following parameters:

- **Sorting mode:** Set the sorting mode of the dimension, for example, ascending or descending.
- **Same name:** Whether to merge dimensions with the same name.
- **Statistics of null values:** Whether to collect statistics on dimensions with null values.
- **Merge to "Other" after the *M*th bar:** Set which bar number to start merging the rest into "Other". For example, the combination starts from the second bar. See the following figure.

Figure 6-35 Uncombined

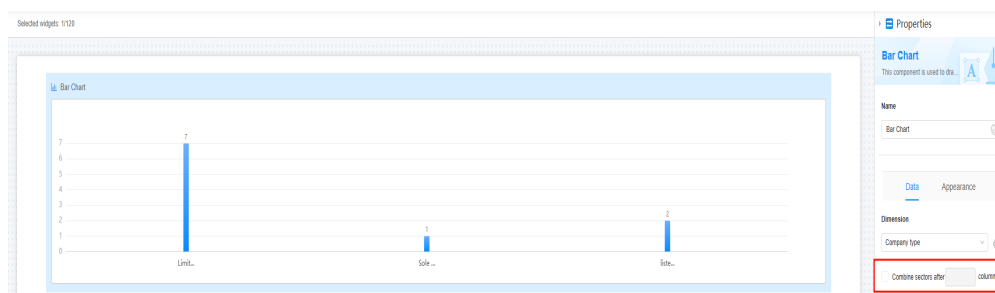
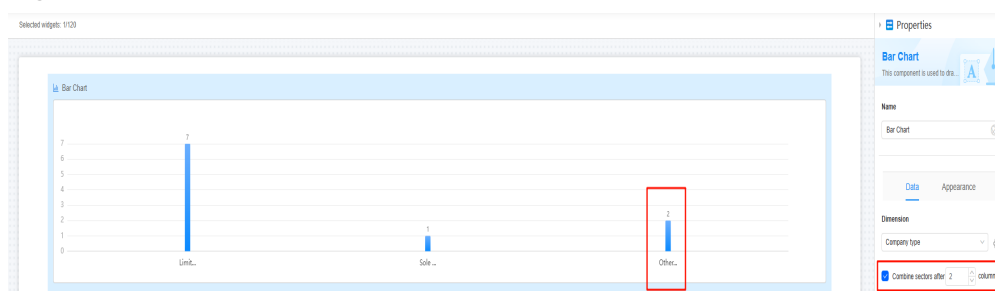


Figure 6-36 Combined




- **Value:** Select the field whose value is to be displayed. After the setting, click  to set the value sorting mode (default, ascending, or descending) and whether to display the bar data when the data is **0**.
- **Data update mode > Real-time update:** Whether the data in the chart needs to be updated in real time.
- **Real-time update interval:** Set the interval at which the data in the chart is updated. This parameter needs to be set only when the real-time update function is enabled.
- **Data Filtering:** Click **+Add** to set filter criteria. You can collect data based on the criteria. For example, filter data for companies that are listed. See [Figure 6-19](#).

Figure 6-37 No filter criteria added

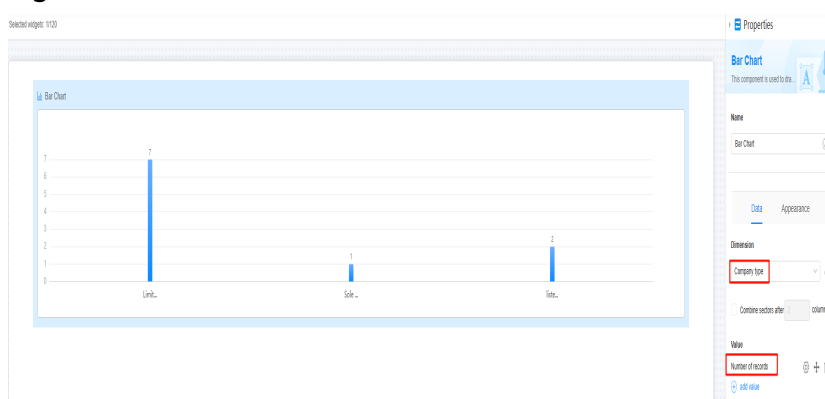
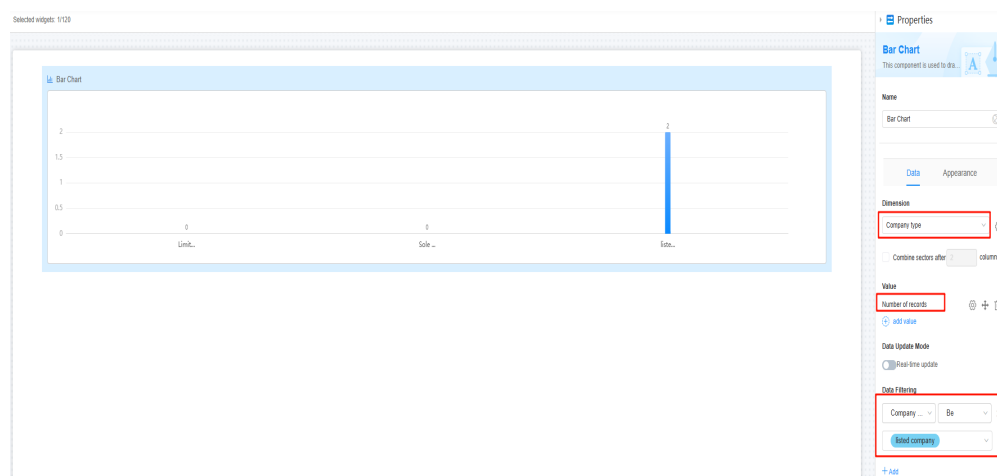


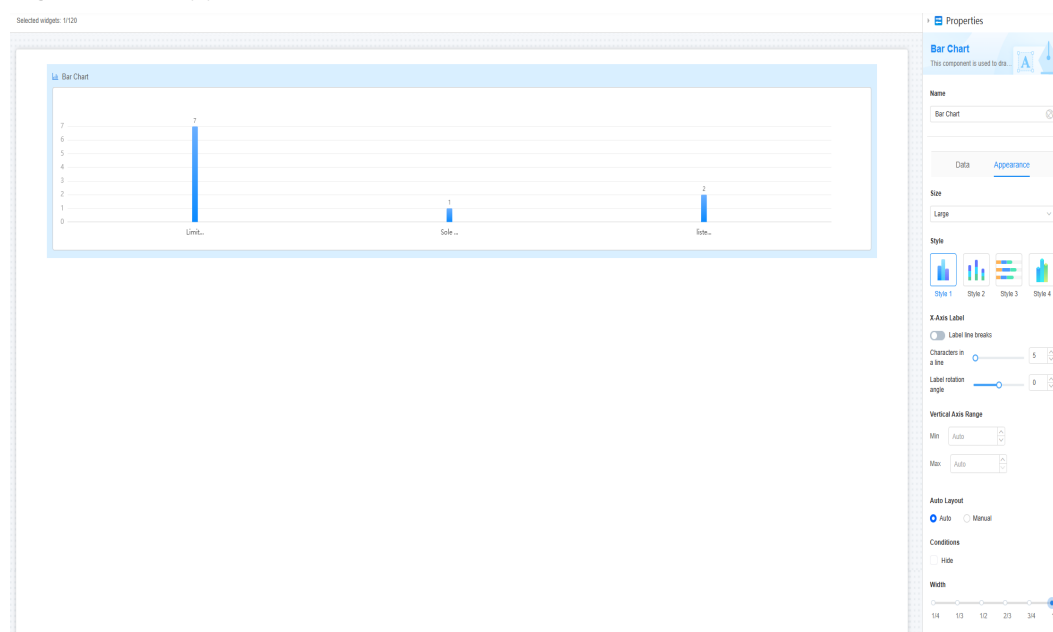
Figure 6-38 Filter criteria added



Appearance

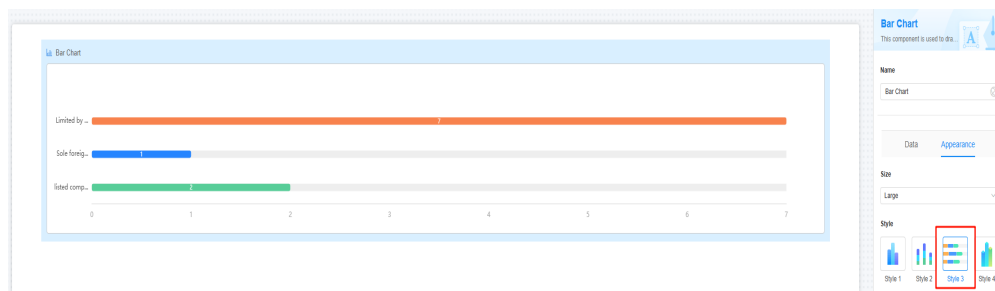
Set the appearance and style of the widget.

Figure 6-39 Appearance



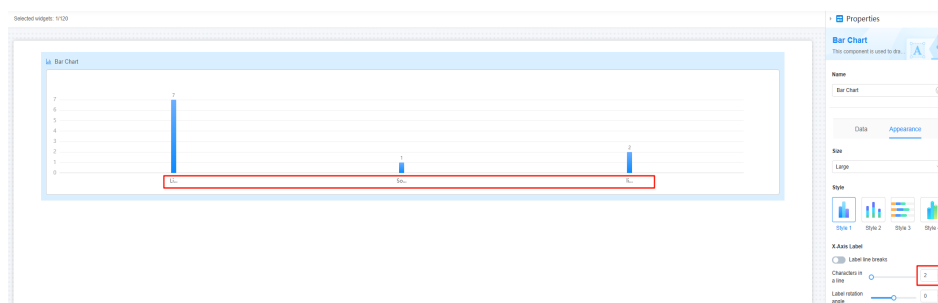
- **Size:** Set the size of the bar chart, for example, large, medium, or small. The default value is **Large**.
- **Style:** Select the chart style. The default value is **Style 1**.

Figure 6-40 Effect of setting the chart style to style 3



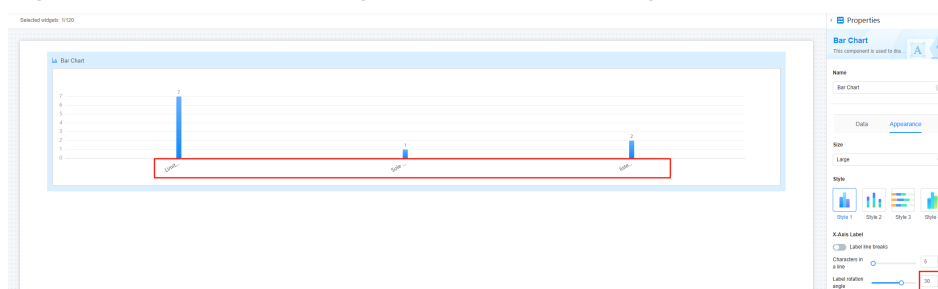
- X-axis label
 - Label line breaks: Whether to wrap a line when there are too many characters on the horizontal axis.
 - Max. characters per line: This sets the maximum number of characters displayed in a single line on the horizontal axis. If line breaks are not set, excess characters are omitted. The range is [1,100].

Figure 6-41 Effect of setting the number of characters to 2



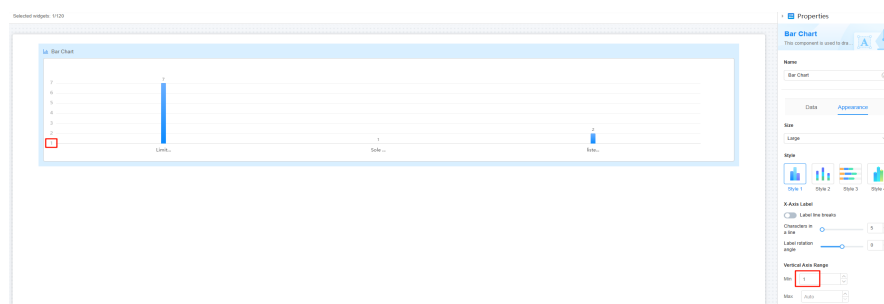
- Label rotation angle: This parameter specifies the rotation angle of the label. The value range is $[-90, 90]$. The default value is **0**, indicating that the label is displayed horizontally.

Figure 6-42 Effect of setting the label rotation angle to 30



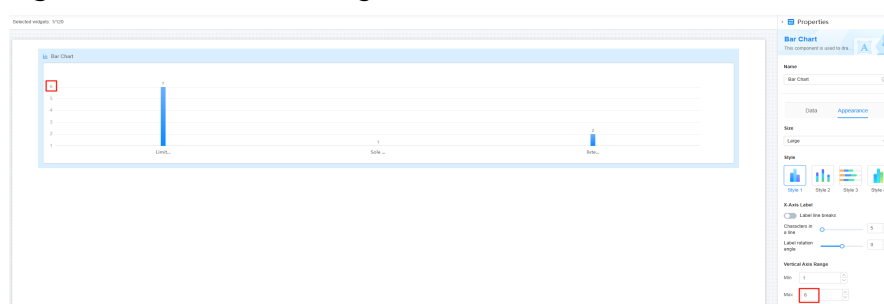
- Vertical axis range
 - Min. value: Minimum value of the vertical coordinate. The default value is **Auto**.

Figure 6-43 Effect of setting the minimum value to 1



- Max. value: Maximum value of the vertical coordinate. The default value is **Auto**.

Figure 6-44 Effect of setting the maximum value to 6



- Number of scales: Set the number of scale lines on the vertical axis. Each line corresponds to a value indicating the height of the data column in the bar chart. Default is **Auto**.

Figure 6-45 Effect of setting the number of scales to Auto

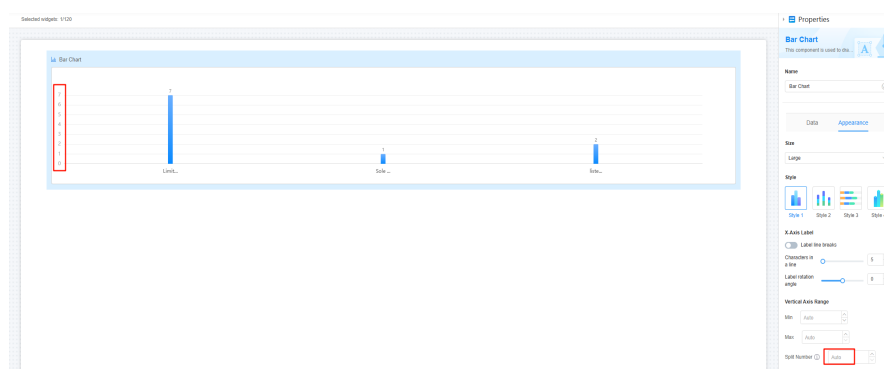
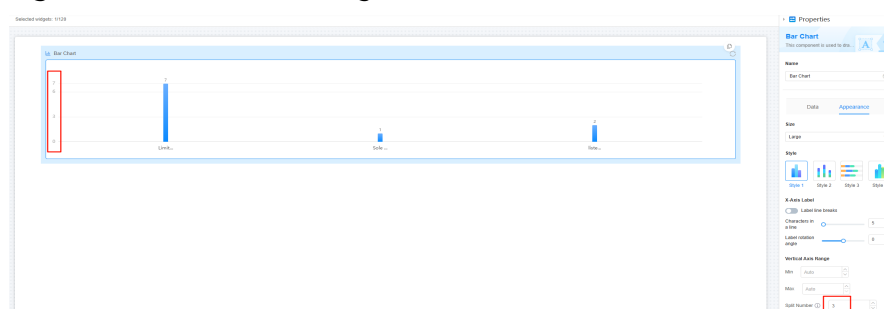
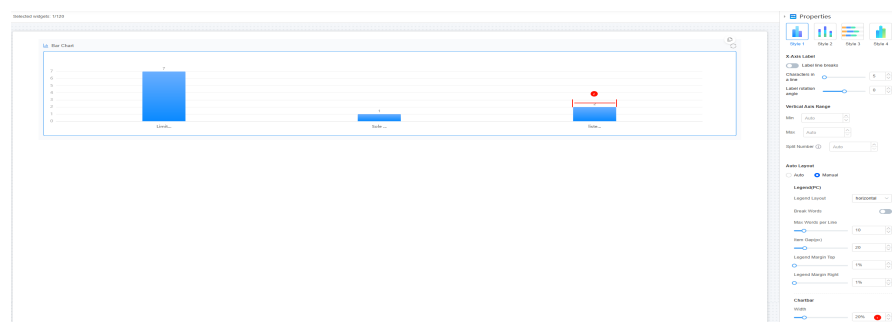


Figure 6-46 Effect of setting the number of scales to 3



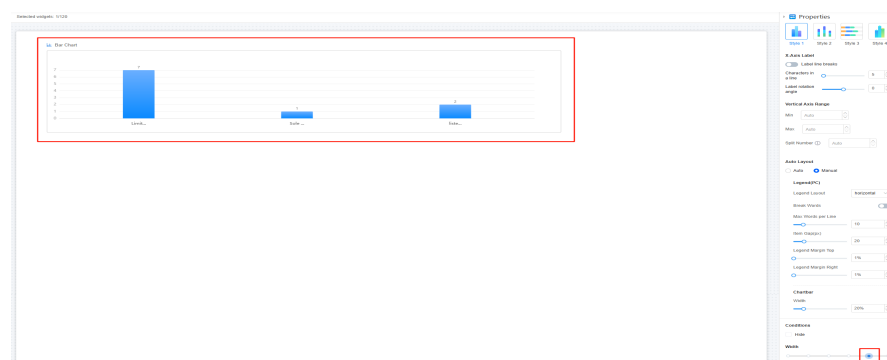
- **Layout:** Select the layout mode of the widget. The options are **Auto** and **Manual**. The default value is **Auto**. When **Manual** is selected, you can perform the following operations as required:
 - **Legend layout:** Set the list layout of the legend, for example, vertical or horizontal.
 - **Break words:** Whether to enable tag line feed. After this function is enabled, if the number of characters in a label exceeds the maximum number of characters in a single line, the label is automatically wrapped.
 - **Maximum number of characters in a single line:** The value ranges from 1 to 50.
 - **Item gap:** Spacing between legend list items, in pixels.
 - **Legend position (top margin):** Set the percentage from the legend to the top of the widget border.
 - **Legend position (right margin):** Set the percentage of the legend to the right of the widget border.
 - **Width:** Width of the bar in the bar chart.

Figure 6-47 Width



- **Conditions:** If you check the **Hide** option, the widget is hidden on the page.
- **Width:** Ratio of the widget box width to the page width. Adjust the width to optimize the layout and display of the widget on the page, improving overall appearance and usability.

Figure 6-48 Setting the widget width



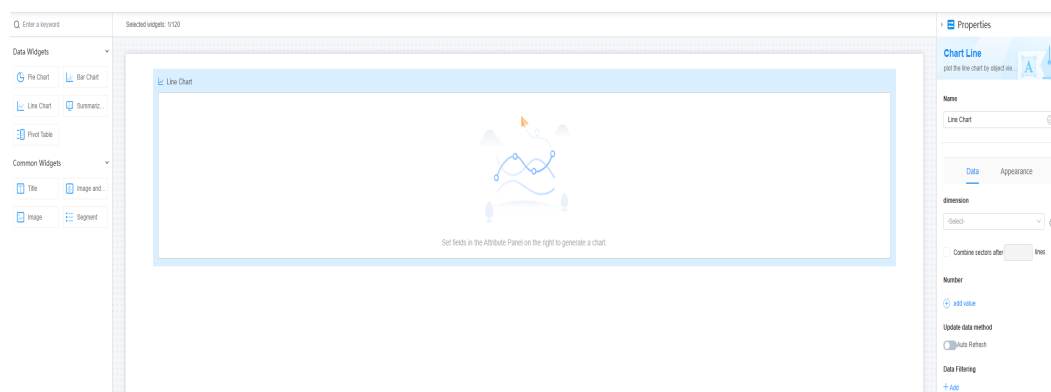
- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.

- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

6.3.3 Setting the Properties of the Line Chart Widget

This widget shows data trends by connecting data points to form one or more lines. This widget is especially useful for displaying trends, modes, and periodic changes.

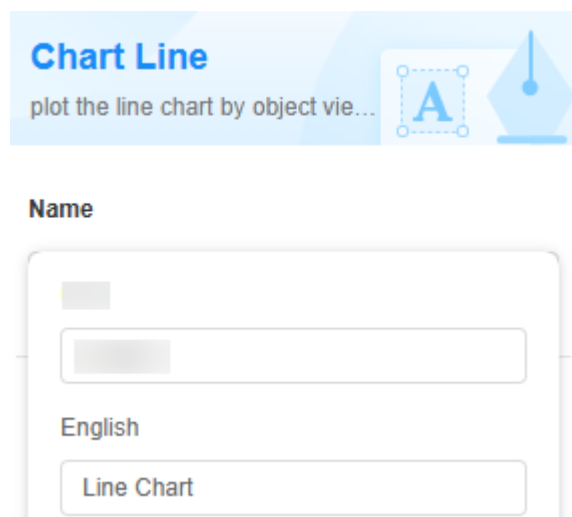
Figure 6-49 Line chart widget



Name

Set the widget name shown to users. Click  to set Chinese and English names.

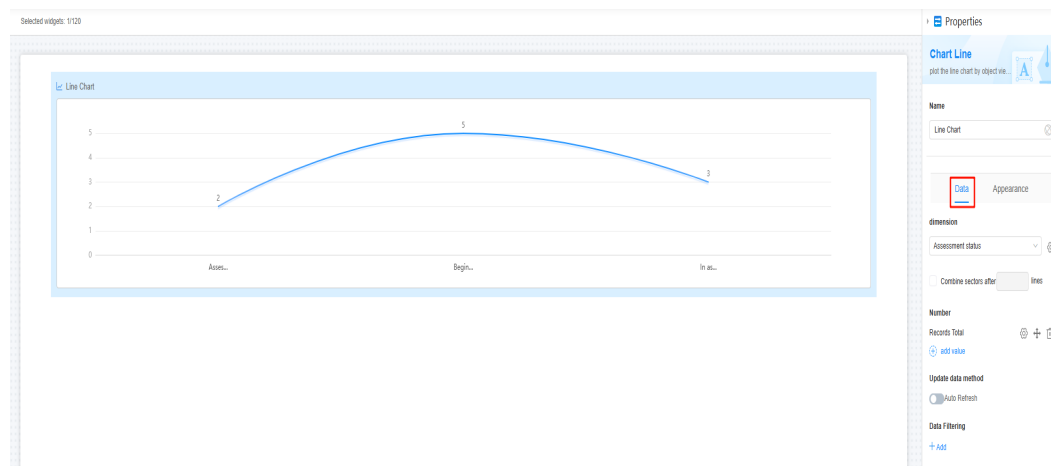
Figure 6-50 Setting the widget name (Chinese and English)



Data

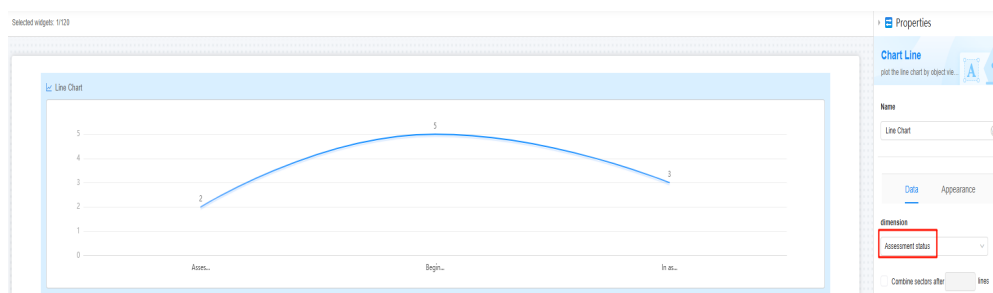
Set the data source of the widget.


Figure 6-51 Data



- Dimension: Select a field in the table as the dimension field of the line chart.

Figure 6-52 Dimension



Click  next to **Dimension** and set the following parameters:

- Sorting mode: Set the sorting mode of the dimension, for example, ascending or descending.
- Same name: Whether to merge dimensions with the same name.
- Statistics of null values: Whether to collect statistics on dimensions with null values.
- Group: Whether to group data by **Year**, **Month**, **Day**, **Hour**, **Minute**, and **Second** during statistics collection. This parameter is displayed only when date and time type is selected.
- Combine the *M*th line and all subsequent lines into "Other": Set the *M*th line as the starting point and merge all following lines into the "Other" category. For example, the combination starts from the first line. See the following figure.

Figure 6-53 Uncombined

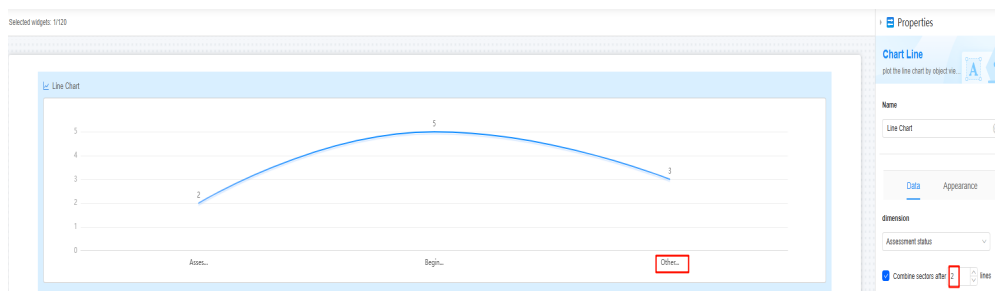
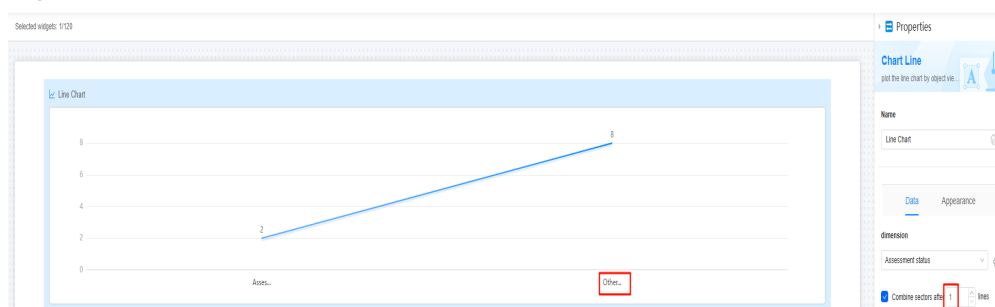


Figure 6-54 Combined




- **Value:** Select the field whose value is to be displayed. After the setting, click  to set the value sorting mode (default, ascending, or descending) and whether to display the line data when the data is 0.
- **Data update mode > Real-time update:** Whether the data in the chart needs to be updated in real time.
- **Real-time update interval:** Set the interval at which the data in the chart is updated. This parameter needs to be set only when the real-time update function is enabled.
- **Data Filtering:** Click **+Add** to set filter criteria. You can collect data based on the criteria. For example, filter data for companies that are **Limited by shares**. See [Figure 6-19](#).

Figure 6-55 No filter criteria added

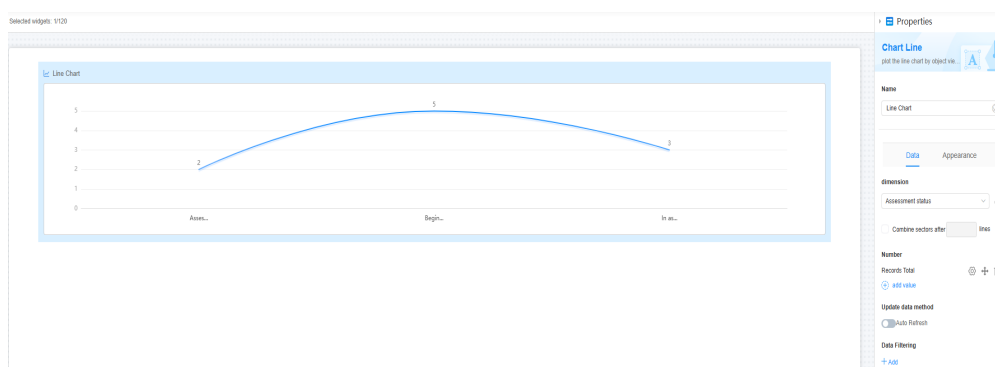
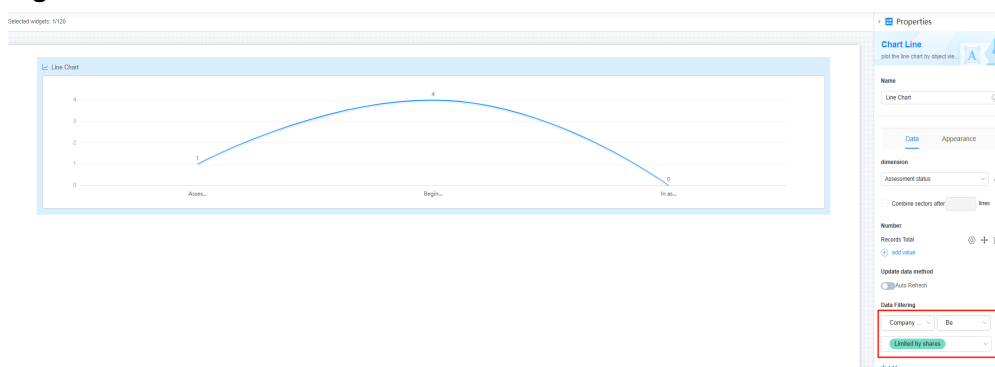


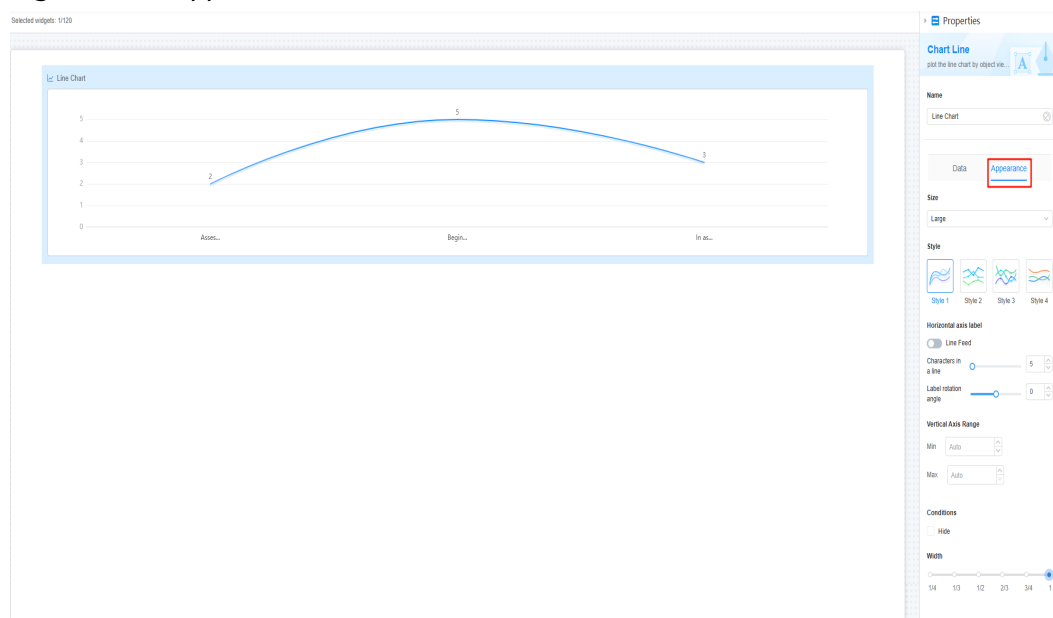
Figure 6-56 Filter criteria added



Appearance

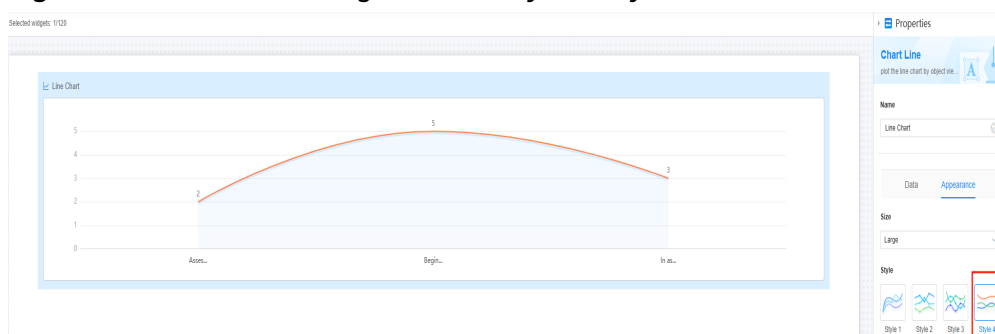
Set the appearance and style of the widget.

Figure 6-57 Appearance



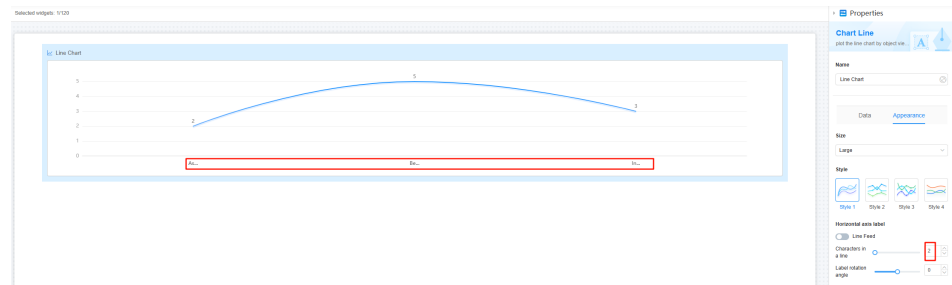
- **Size:** Set the size of the line chart, for example, large, medium, or small. The default value is **Large**.
- **Style:** Select the chart style. The default value is **Style 1**.

Figure 6-58 Effect of setting the chart style to style 4



- Horizontal axis label
 - Line feed: Whether to wrap a line when there are too many characters on the horizontal axis.
 - Max. characters per line: This sets the maximum number of characters displayed in a single line on the horizontal axis. If line breaks are not set, excess characters are omitted. The range is [1,100].

Figure 6-59 Effect of setting the number of characters to 2



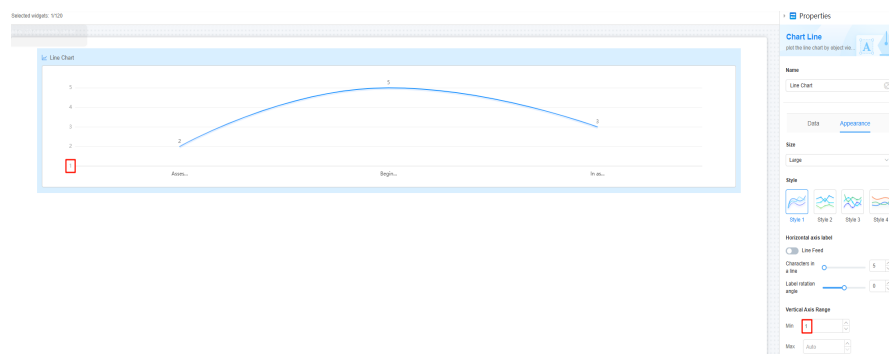
- Label rotation angle: This parameter specifies the rotation angle of the label. The value range is $[-90, 90]$. The default value is **0**, indicating that the label is displayed horizontally.

Figure 6-60 Effect of setting the label rotation angle to 30



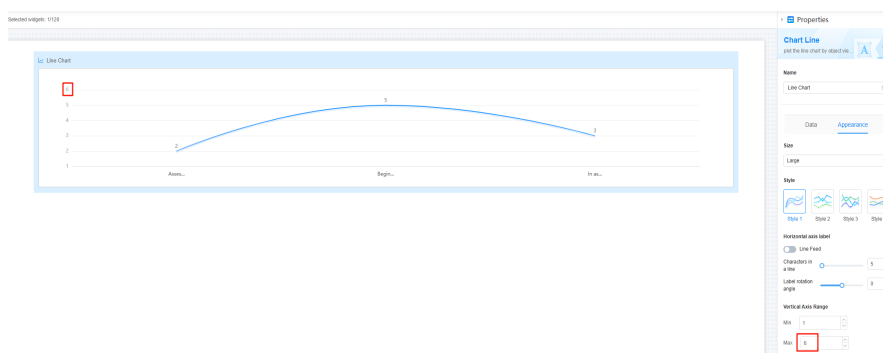
- Vertical axis range
 - Min. value: Minimum value of the vertical coordinate. The default value is **Auto**.

Figure 6-61 Effect of setting the minimum value to 1



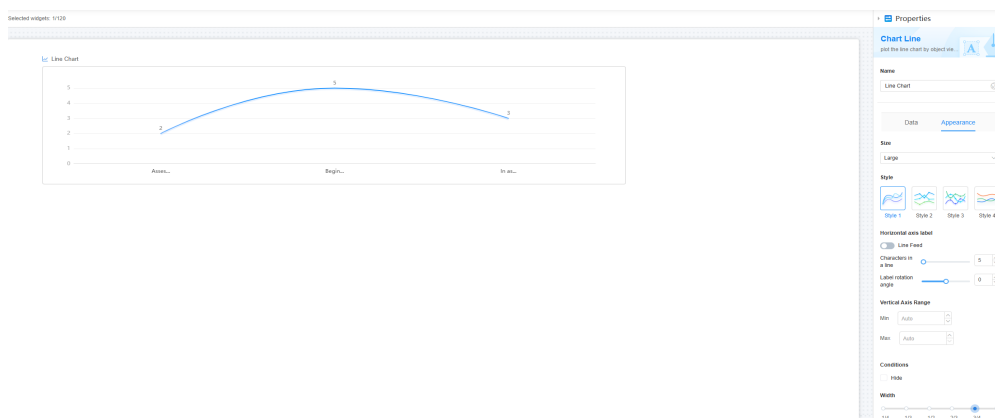
- Max. value: Maximum value of the vertical coordinate. The default value is **Auto**.

Figure 6-62 Effect of setting the maximum value to 6



- Conditions: If you check the **Hide** option, the widget is hidden on the page.
- Width: Ratio of the widget box width to the page width. Adjust the width to optimize the layout and display of the widget on the page, improving overall appearance and usability.

Figure 6-63 Setting the widget width

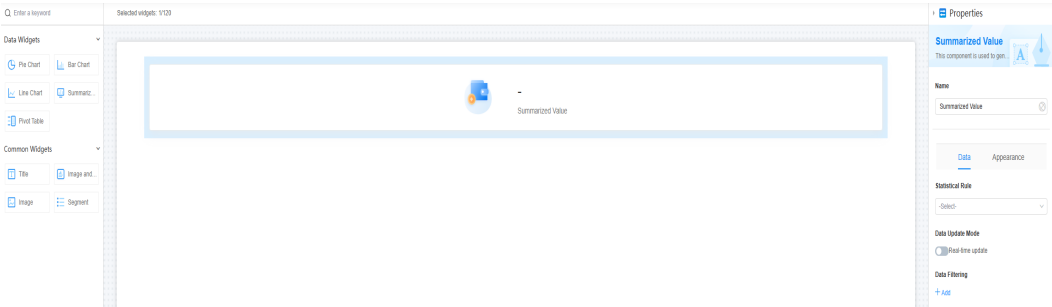


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

6.3.4 Setting the Properties of the Summarized Value Widget

This widget calculates the total of a specific field or the number of records in a form.

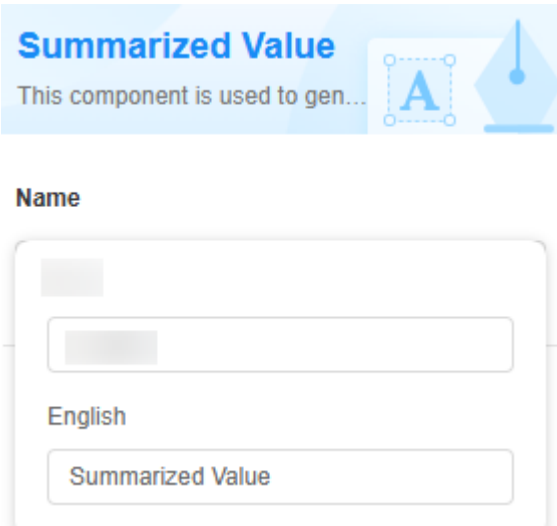
Figure 6-64 Summarized value widget



Name

Set the widget name shown to users. Click  to set Chinese and English names.

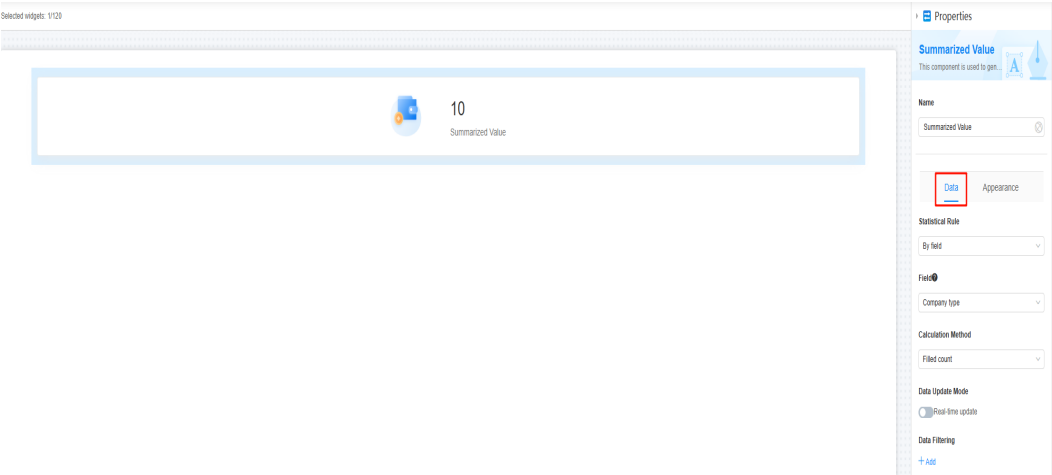
Figure 6-65 Setting the widget name (Chinese and English)



Data

Set the data source of the widget.

Figure 6-66 Data



- Statistical rule: Choose the summary method, such as **By field** or **Count**.
 - **By field**: The number of records is summarized by field. If a field is a number, the maximum value, minimum value, and average value can be provided.
 - **Count**: The data is summarized based on the number of records.
- If the statistical rule is set to **By field**, you need to set the target field.
Multiple selection fields (users, associations), summaries, sub-tables, and matrix scales support summarizing only the first 5,000 records of data.
- **Calculation Method**: When **Statistics Rule** is set to **By field**, you need to set the calculation method.
 - **Unfilled count**: The number of empty cells in the table.
 - **Filled count**: The number of cells with reported data.
 - **Deduplicate count**: The number of unique data entries after removing duplicates from the report.
- Data update mode > Real-time update: Whether the data in the chart needs to be updated in real time.
- Real-time update interval: Set the interval at which the data in the chart is updated. This parameter needs to be set only when the real-time update function is enabled.
- **Data Filtering**: Click **+Add** to set filter criteria. You can collect data based on the criteria. For example, filter data for companies that are **Limited by shares**. See [Figure 6-19](#).

Figure 6-67 No filter criteria added

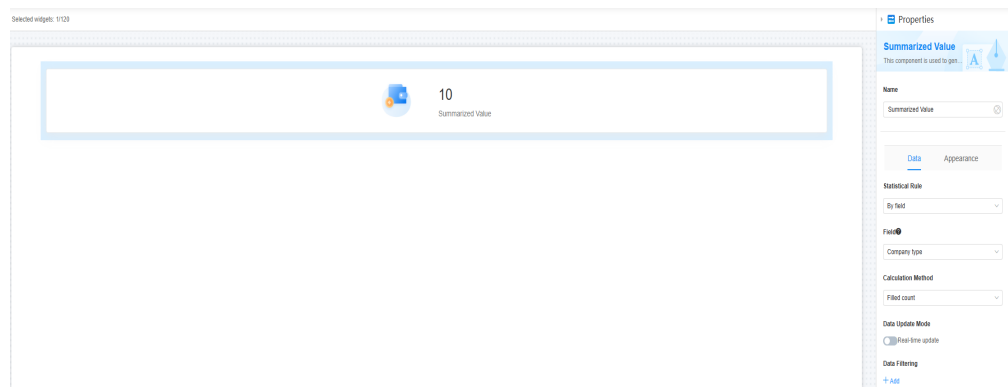
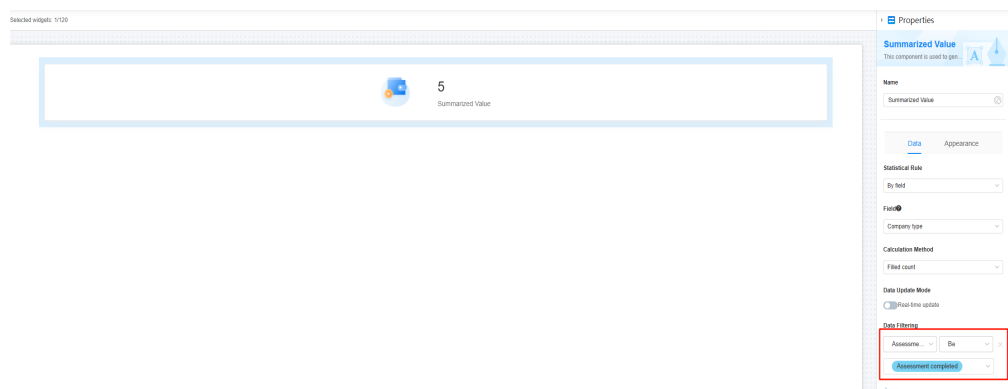


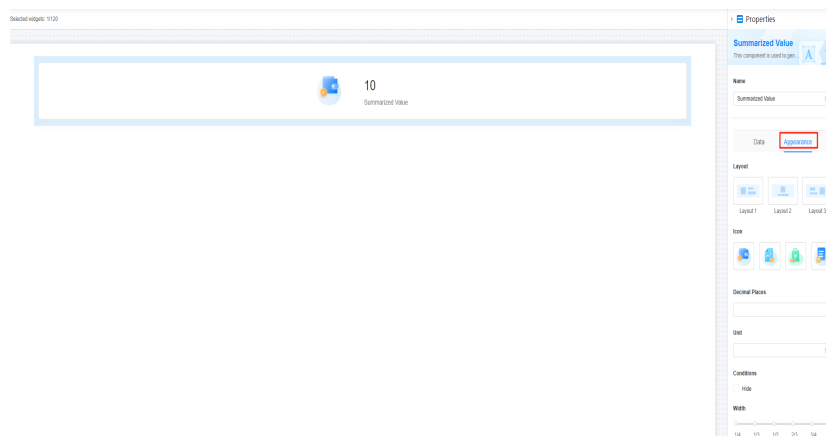
Figure 6-68 Filter criteria added



Appearance

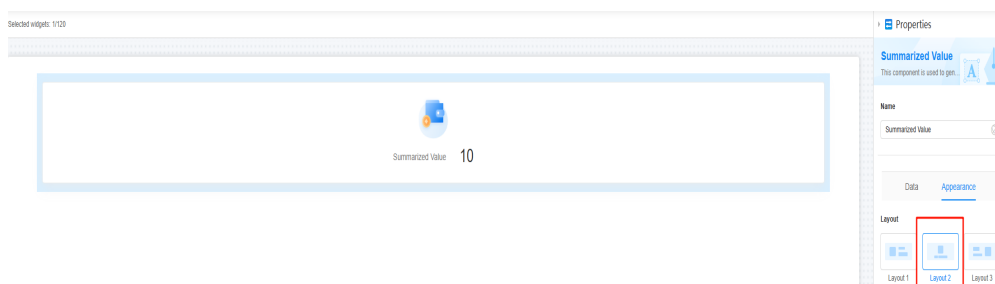
Set the appearance and style of the widget.

Figure 6-69 Appearance



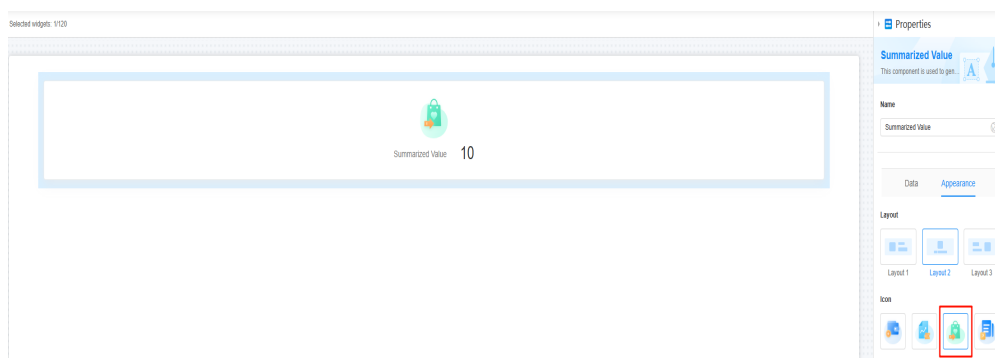
- **Layout:** Choose a layout for the summary value chart. The default layout is **Layout 1**.

Figure 6-70 Effect of setting the layout to layout 2



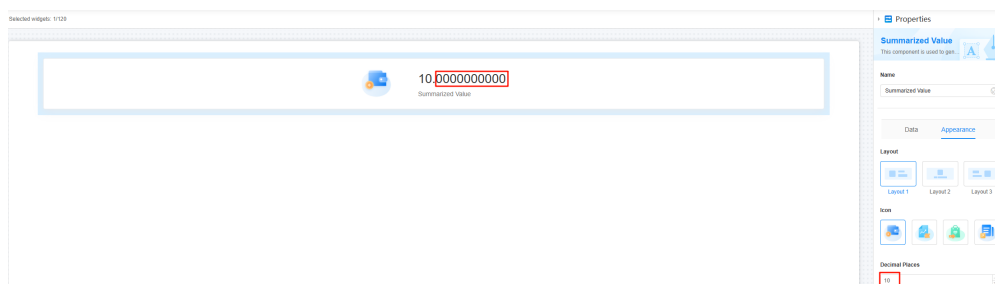
- **Icon:** Set the icon style of the widget.

Figure 6-71 Selecting an icon



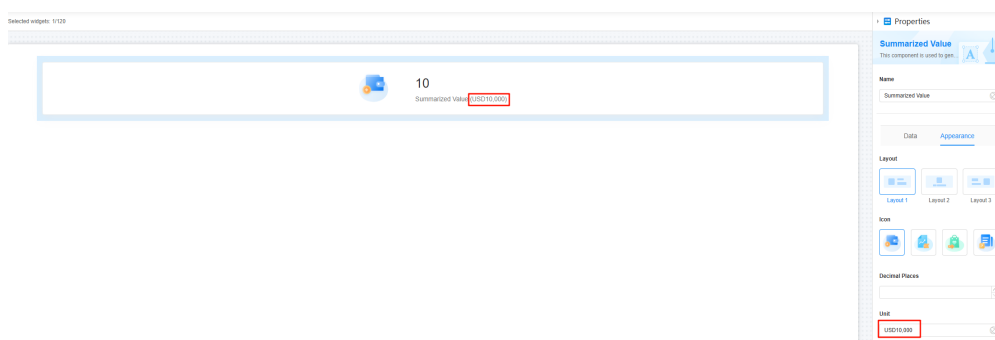
- **Decimal places:** Number of decimal places to display for the data in the widget. The value range is [0, 10].

Figure 6-72 Effect of retaining 10 decimal places



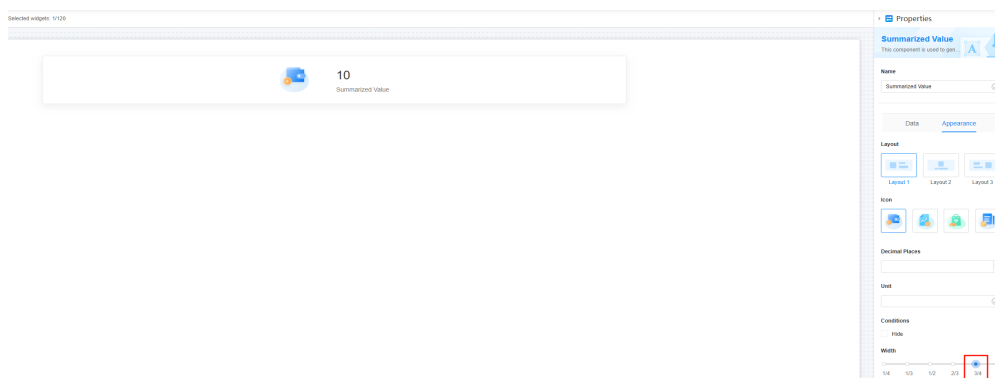
- Unit: Unit of the total amount.

Figure 6-73 Effect of setting the unit



- Conditions: If you check the **Hide** option, the widget is hidden on the page.
- Width: Ratio of the widget box width to the page width. Adjust the width to optimize the layout and display of the widget on the page, improving overall appearance and usability.

Figure 6-74 Setting the widget width

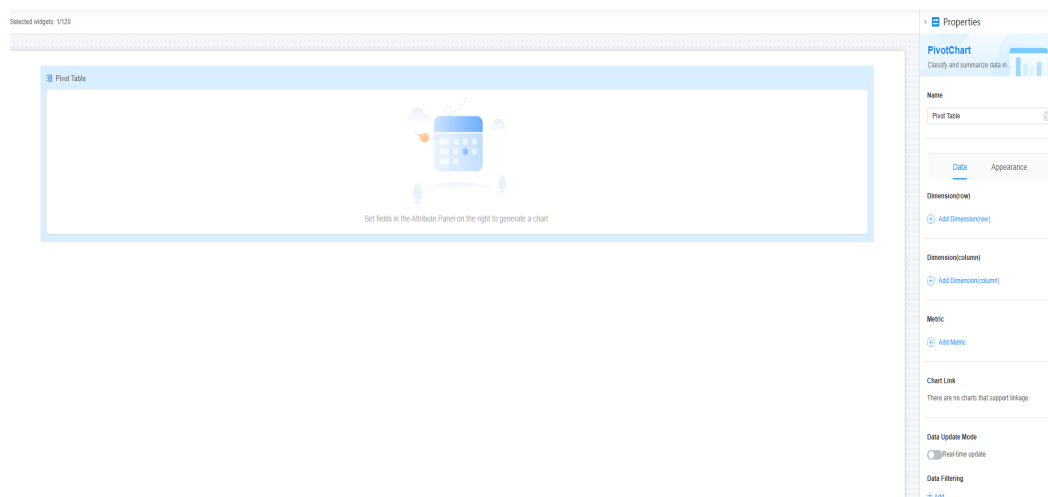


- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

6.3.5 Setting the Properties of the Pivot Table Widget

This widget classifies and summarizes data across different dimensions. Set multiple dimensions (rows and columns) to display target values within each dimension.

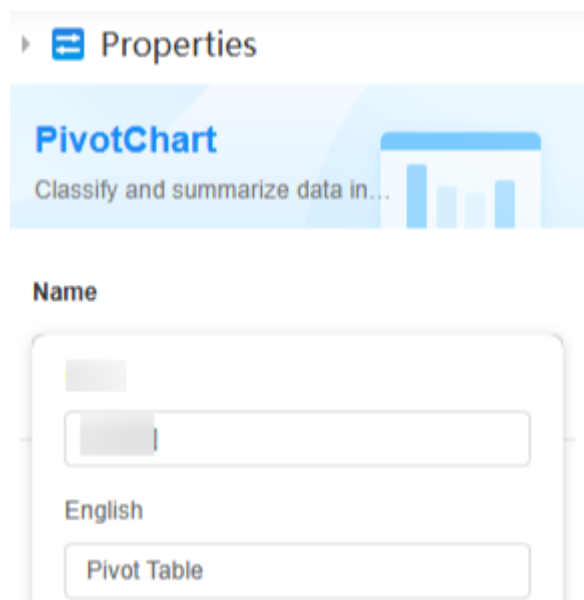
Figure 6-75 Pivot table widget



Name

Set the widget name shown to users. Click  to set Chinese and English names.

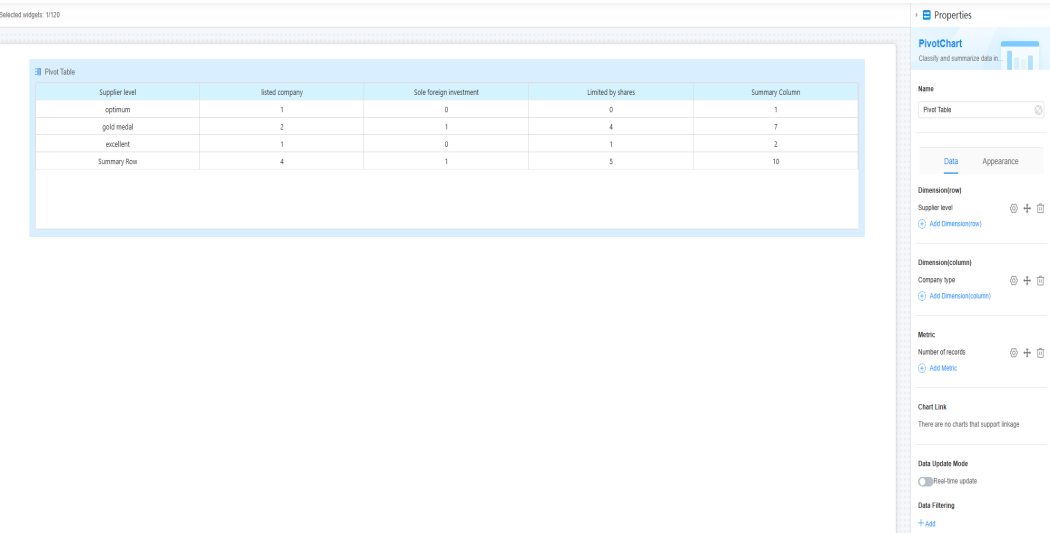
Figure 6-76 Setting the widget name (Chinese and English)



Data

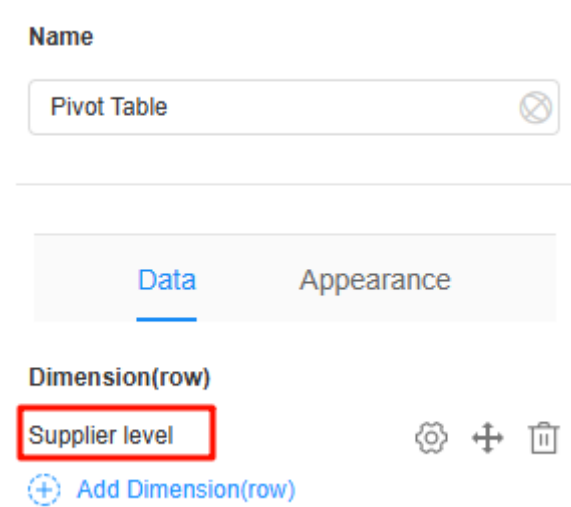
Set the data source of the widget.

Figure 6-77 Data



- Dimension (Row): Click **Add Dimension (Row)** and select the required row to add row data.

Figure 6-78 Adding the supplier level dimension




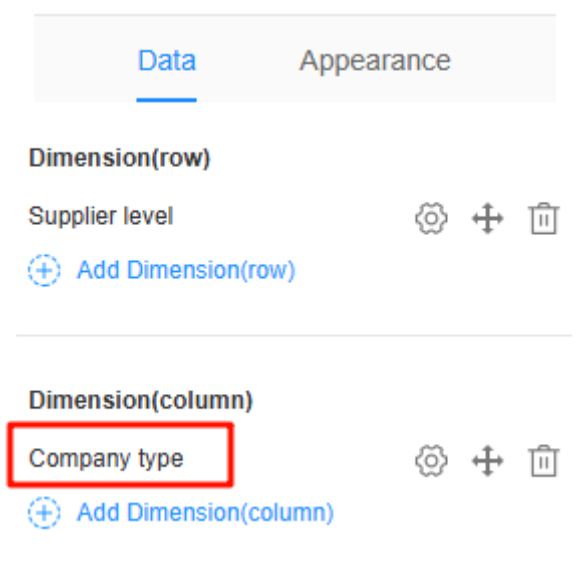

- Click  next to a dimension to perform the following operations:
- Sorting mode: Set the sorting mode of the row dimension, for example, **Default**, **Ascending**, or **Descending**.
 - Rename: Modify the name of an added row dimension.
 - Count null value: Whether to count null values during statistics collection.
 - Group: Whether to group data by **Year**, **Month**, **Day**, **Hour**, **Minute**, and **Second** during statistics collection.
- Dimension (Column): Click **Add Dimension (column)** and select the required columns to add column data.

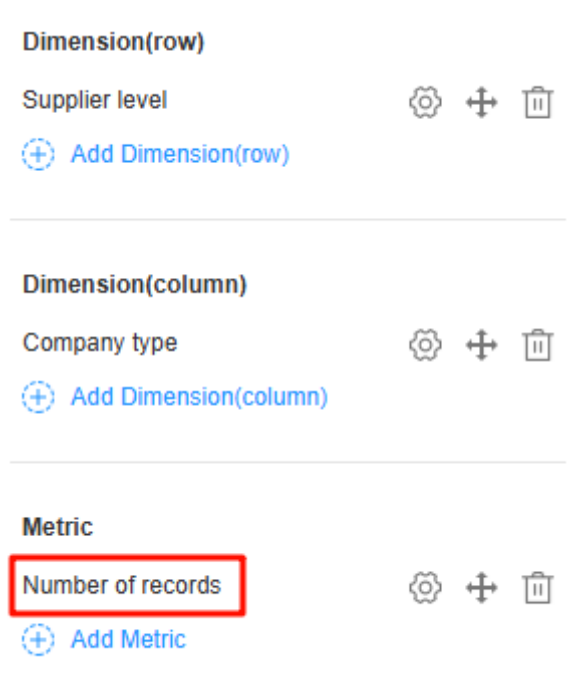
Figure 6-79 Adding the company type dimension




Click  next to a dimension to perform the following operations:

- Sorting mode: Set the sorting mode of the column dimension, for example, **Default**, **Ascending**, or **Descending**.
 - Rename: Modify the name of an added column dimension.
 - Count null value: Whether to count null values during statistics collection.
 - Group: Whether to group data by **Year**, **Month**, **Day**, **Hour**, **Minute**, and **Second** during statistics collection.
- Metric: Click **Add Metric** and select the required metric to add data.

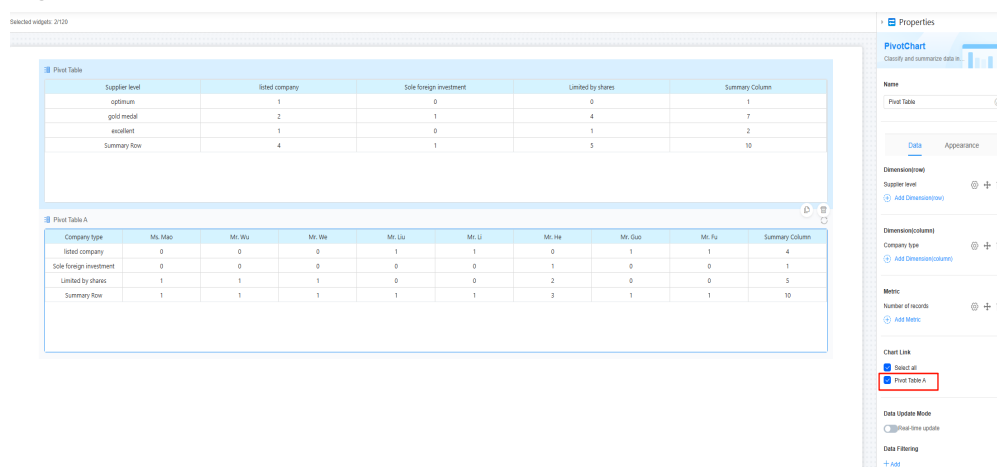
Figure 6-80 Adding records



Click  next to a dimension to perform the following operations:

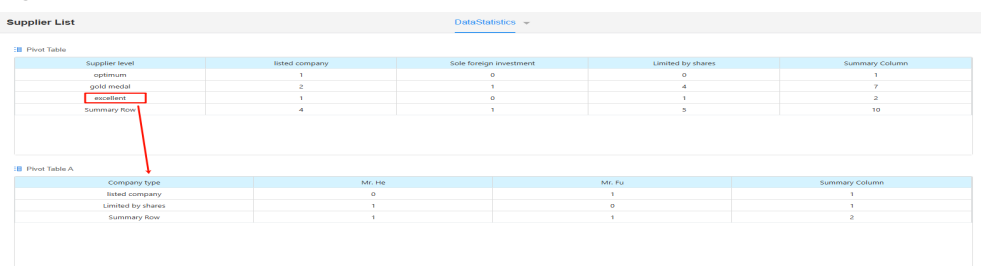
- Sorting mode: Set the sorting mode of the values, for example, **Default**, **Ascending**, or **Descending**.
 - Rename: Modify the name of an added value.
 - Count null value: Whether to count null values during statistics collection.
 - Group: Whether to group data by **Year**, **Month**, **Day**, **Hour**, **Minute**, and **Second** during statistics collection.
- Chart association: If there are multiple pivot tables, you can select the associated pivot table.

Figure 6-81 Chart association



In the primary pivot table, click a dimension. The corresponding data is displayed in the secondary pivot table. For example, if you click **excellent** under **Supplier level** in the primary pivot table, the secondary pivot table (pivot table A) automatically associates data, as shown in [Figure 6-82](#).

Figure 6-82 Association effect



- Data update mode > Real-time update: Whether the data in the chart needs to be updated in real time.
- Real-time update interval: Set the interval at which the data in the chart is updated. This parameter needs to be set only when the real-time update function is enabled.

- **Data Filtering:** Click **+Add** to set filter criteria. You can collect data based on the criteria. For example, filter the data whose company type is **Listed company** or **Sole foreign investment**. See [Figure 6-84](#).

Figure 6-83 No filter criteria added

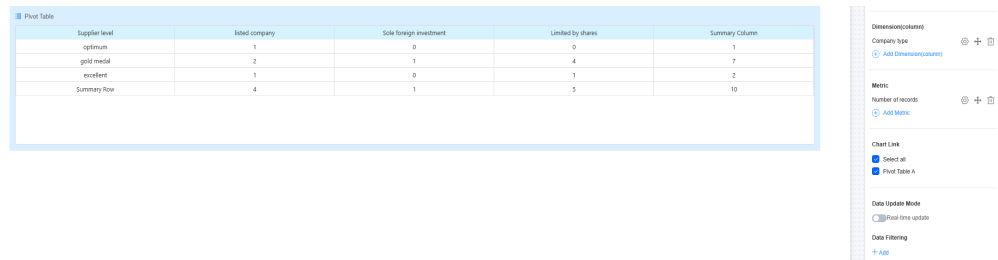
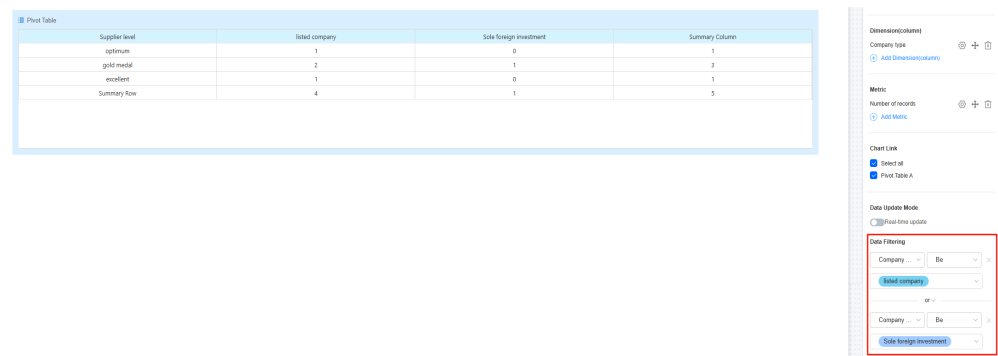


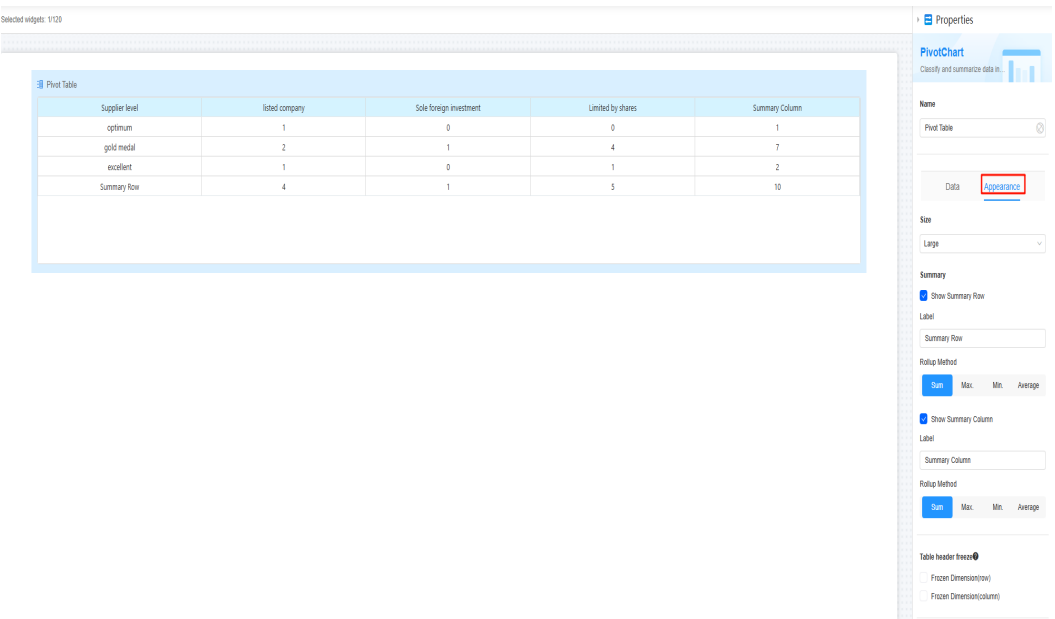
Figure 6-84 Filter criteria added



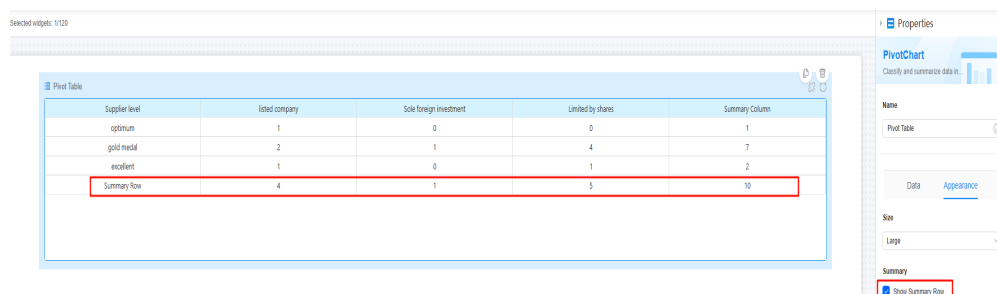
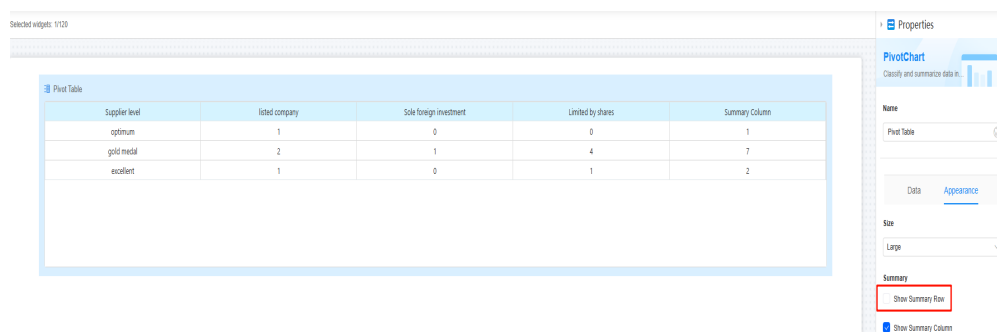
Appearance

Set the appearance and style of the widget.

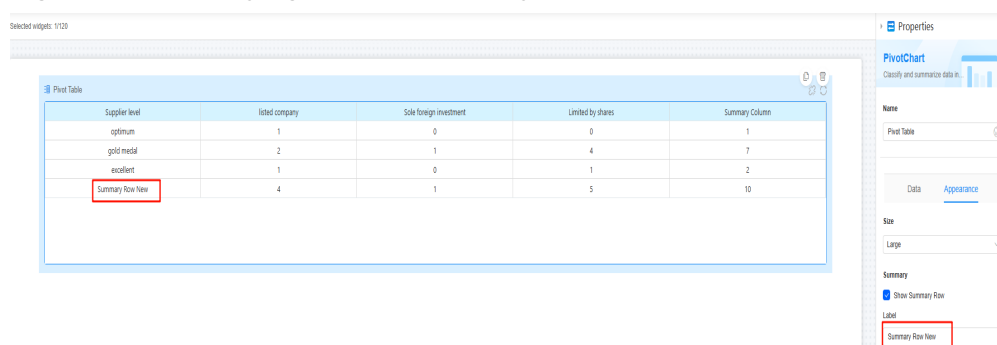
Figure 6-85 Appearance



- Size: Set the size of the widget, for example, large, medium, or small. The default value is **Large**.
- Show row summary: Whether to display the row summary. This option is checked by default.

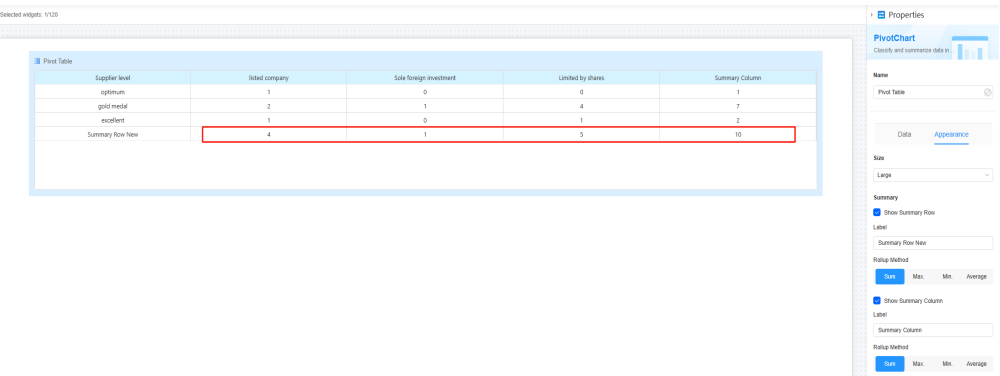
Figure 6-86 Row summary displayed**Figure 6-87** Row summary hidden

- Row summary > Name: Set the name of the row summary.

Figure 6-88 Modifying the row summary effect

- Row summary > Summary mode: Set the row summary mode, such as **Sum**, **Max**, **Min**, and **Average**. The default value is **Sum**.

Figure 6-89 Sum



- Summarize null values: Indicates whether to include null values when calculating the row average. If this option is not selected, rows with values of 0 are excluded from the average calculation. This parameter is mandatory only when the summary mode is set to **Average**.
- Show column summary: indicates whether to display column summary. This option is checked by default.

Figure 6-90 Column summary displayed

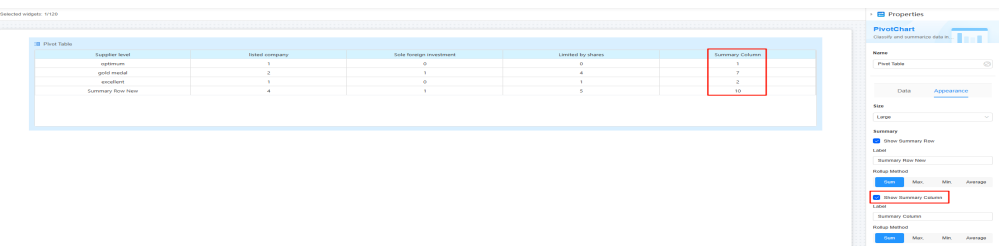
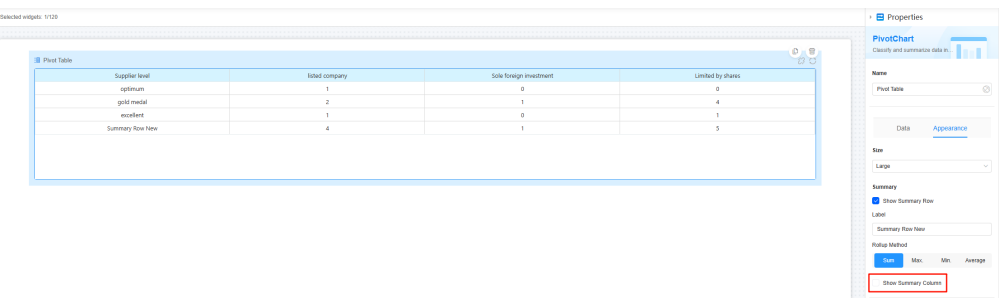
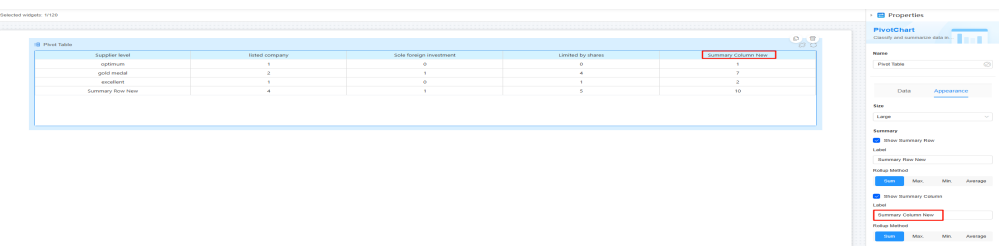


Figure 6-91 Column summary canceled



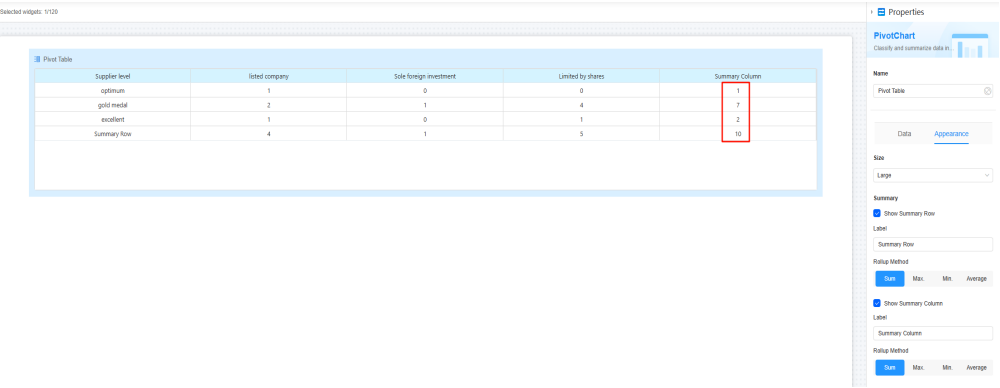
- Column summary > Name: Set the name of the column summary.

Figure 6-92 Modifying the column summary effect



- Column summary > Summary mode: Set the column summary mode, such as **Sum**, **Max**, **Min**, and **Average**. The default value is **Sum**.

Figure 6-93 Sum



- Summarize null values: Indicates whether to include null values when calculating the column average. If this option is not selected, columns with values of 0 are excluded from the average calculation. This parameter is mandatory only when the summary mode is set to **Average**.
- Freeze: Whether to freeze the dimension row or column. Currently, this parameter is **valid only on PCs**.
- Range color: Add color marks to data within a certain value range.
 - Click the button to set rules.

If the value meets multiple condition ranges, the first condition is used by default.
 - Click the button to select the corresponding value field and set the color for the field range as required.

Figure 6-94 Setting the color matching rule for a range

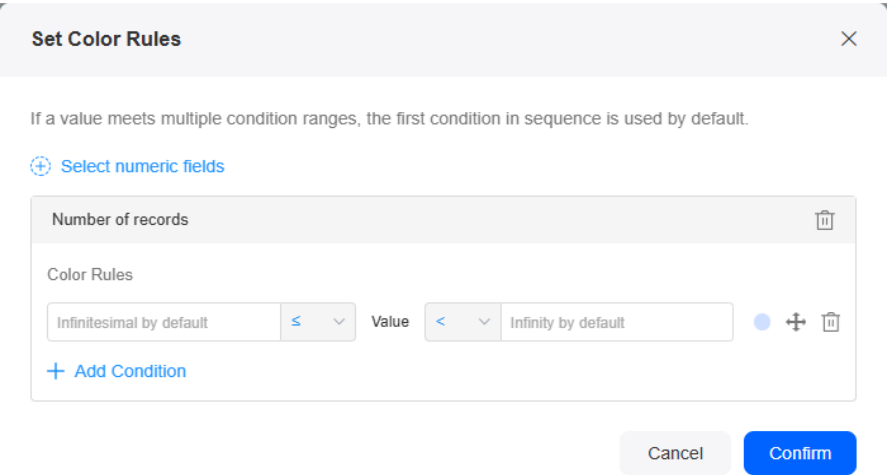
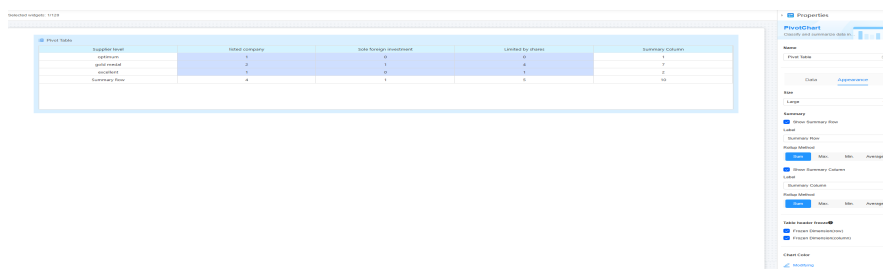
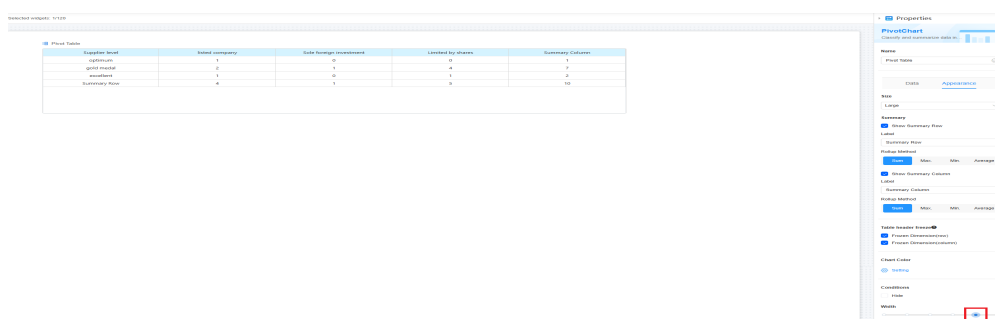


Figure 6-95 Setting the color rule

- Conditions: If you check the **Hide** option, the widget is hidden on the page.
- Width: Ratio of the widget box width to the page width. Adjust the width to optimize the layout and display of the widget on the page, improving overall appearance and usability.

Figure 6-96 Setting the widget width

- 1/4: Widget is 1/4 of the page width.
- 1/3: Widget is 1/3 of the page width.
- 1/2: Widget is 1/2 of the page width.
- 2/3: Widget is 2/3 of the page width.
- 3/4: Widget is 3/4 of the page width.
- 1: Widget is full page width (default).

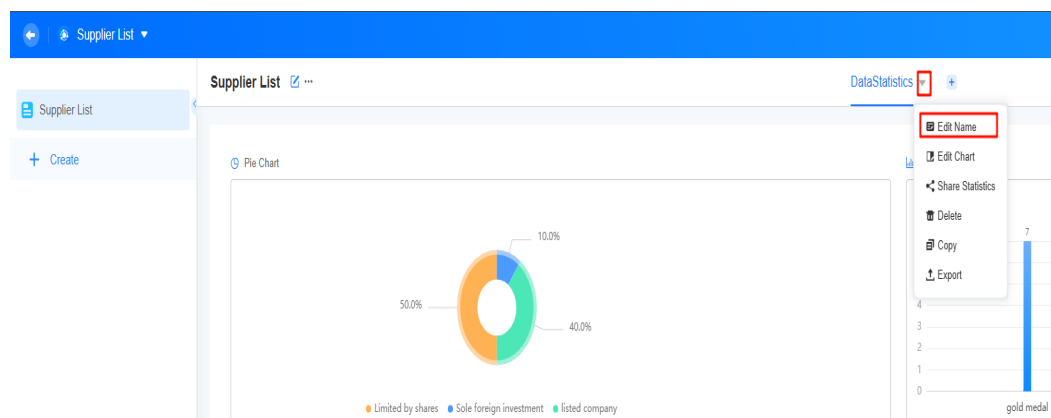
6.4 Managing Data Reports

Modifying the Name of a Data Report

You can change the data report name. For example, if the data report's purpose changes, update the name to help users understand it better.

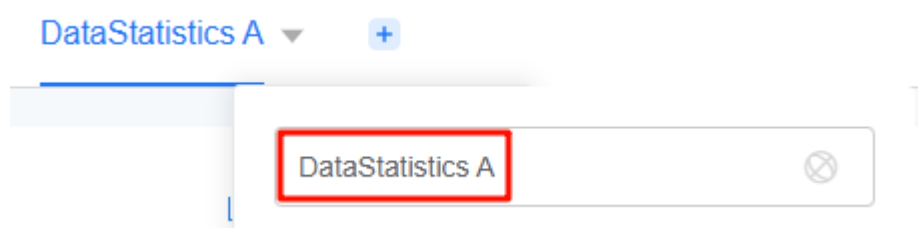
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click **Check Statistics** in the upper right corner of the page.
- Step 4** Click ▼ next to the existing statistics page and choose **Edit Name**.

Figure 6-97 Modifying the name of a data report



Step 5 Enter the new report name and click anywhere blank to update it.

Figure 6-98 Entering the new report name



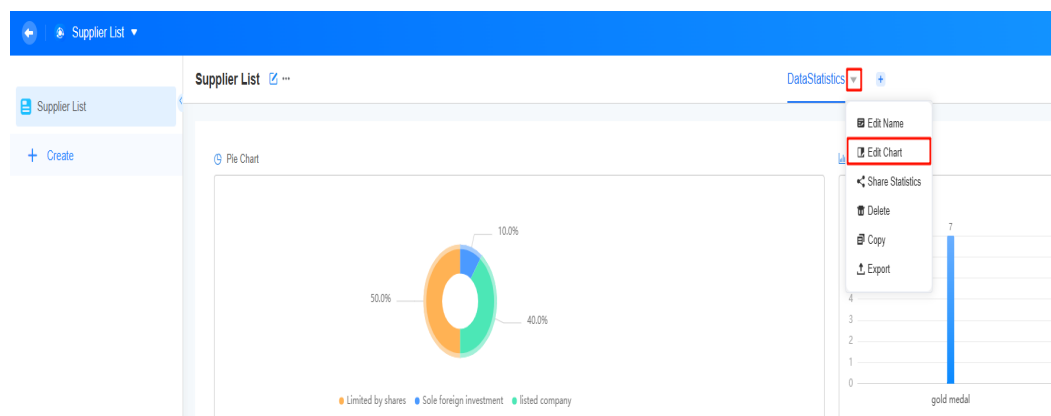
----End

Editing a Data Report

After a data report is created, you can modify the data report if the service requirements change.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click **Check Statistics** in the upper right corner of the page. The statistics page is displayed.
- Step 4** Click ▼ next to the statistics page name and choose **Edit Chart** to perform secondary development.

Figure 6-99 Editing the data report



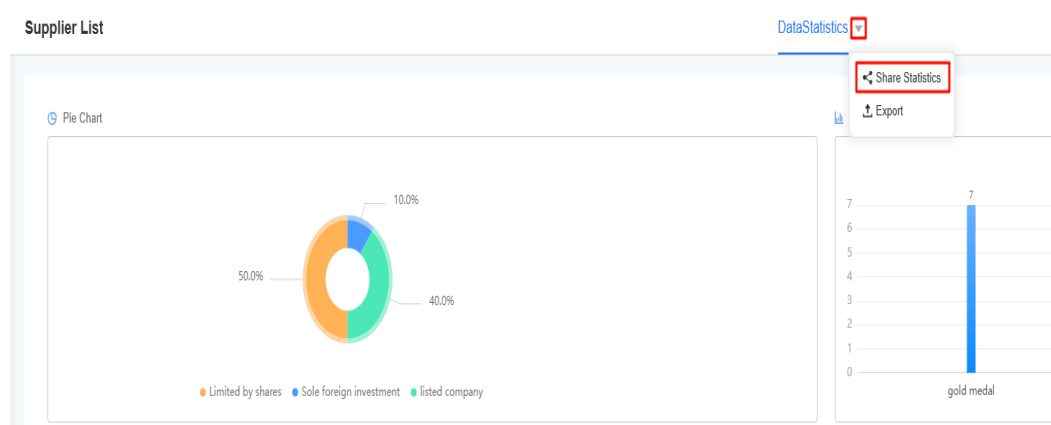
----End

Sharing a Data Report

After the data report is created, you can share it with other users.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** Click **Check Statistics** in the upper right corner of the page.
- Step 4** Click ▼ next to the data report and choose **Share Statistics**.

Figure 6-100 Sharing a data report (runtime)



You can also click the edit button in the upper right corner of the application development page to go to the page for editing the application. Click ▼ next to the data report to be shared and choose **Share Statistics**.

Figure 6-101 Sharing a data report (development)




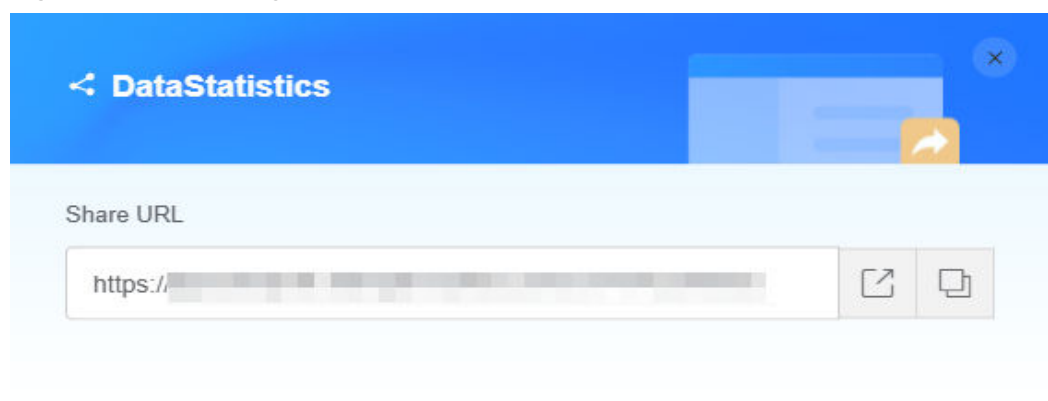
Step 5 Click  next to the link and share the address with other users.

Figure 6-102 Sharing statistics results



Step 6 Other users can enter the obtained address in the browser, enter the username and password, and view the report data.

Figure 6-103 Entering the username and password



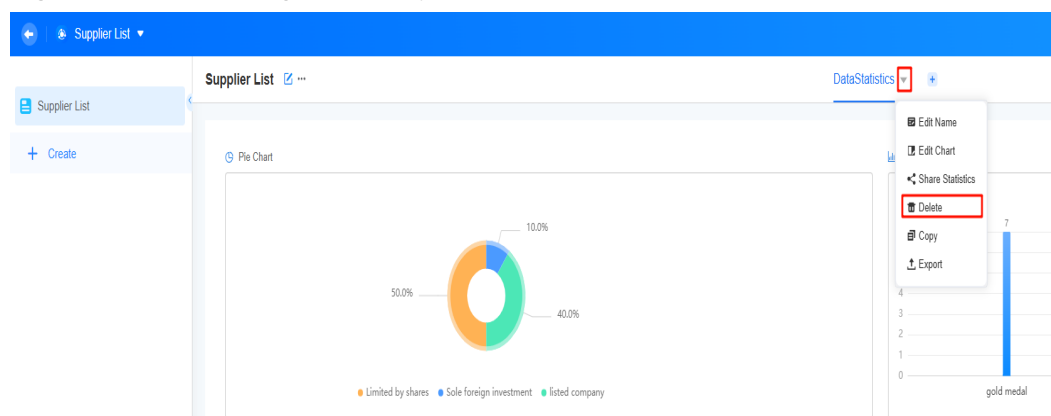
----End

Deleting a Data Report

Deleting a data report will permanently delete the chart data, which cannot be restored. Exercise caution when performing this operation.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click **Check Statistics** in the upper right corner of the page.
- Step 4** Click ▼ next to the data report and choose **Delete**.

Figure 6-104 Deleting a data report



- Step 5** In the displayed dialog box, confirm the deletion.

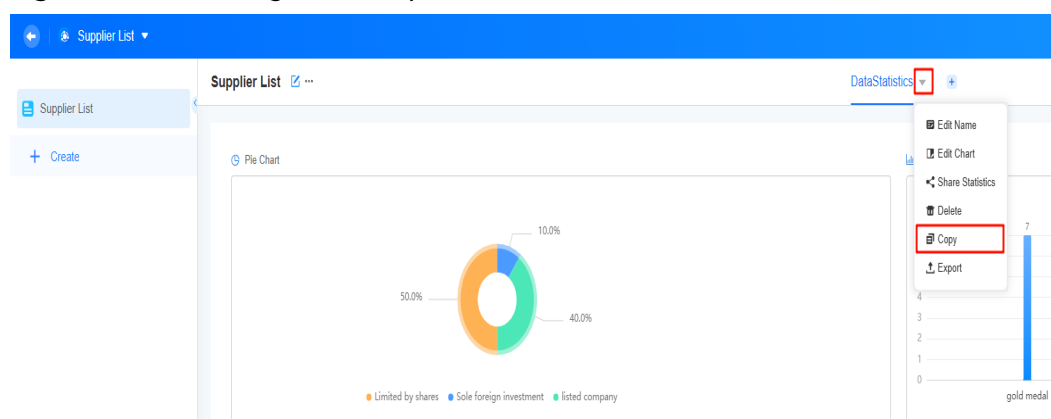
----End

Cloning a Data Report

If the service scenarios are similar, you can clone a data report to create a new one quickly.

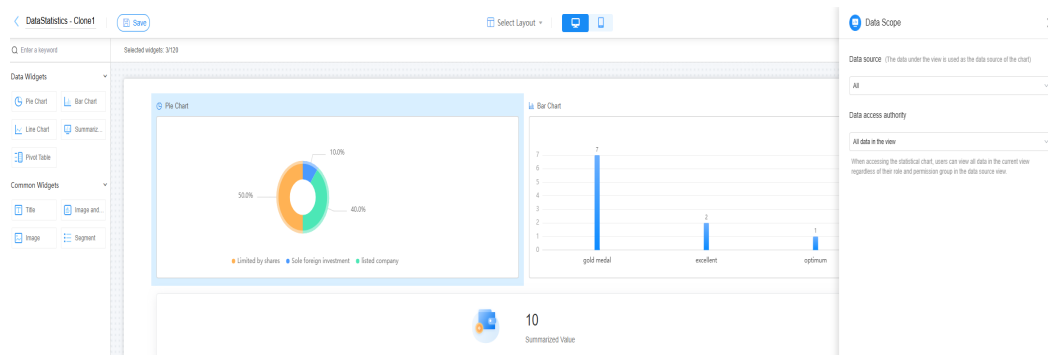
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click **Check Statistics** in the upper right corner of the page.
- Step 4** Click ▼ next to the data report and choose to clone the data report.

Figure 6-105 Cloning a data report



After the cloning is successful, the system shows the page of the cloned data report.

Figure 6-106 Page of the cloned data report



----End

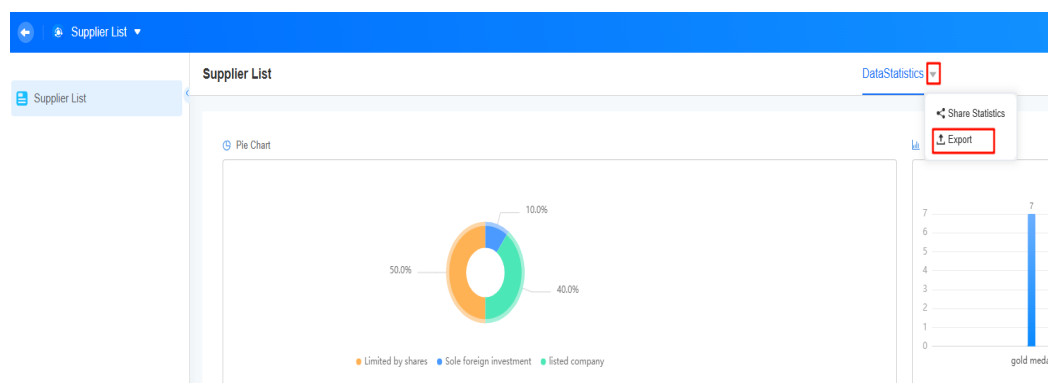
Exporting a Data Report

You can export a data report as a PNG image in both development and runtime environments.

- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, click the target application. The application development page is displayed.
- Step 3** Click **Check Statistics** in the upper right corner of the page.
- Step 4** Click ▼ next to the data report and choose to export the data report.

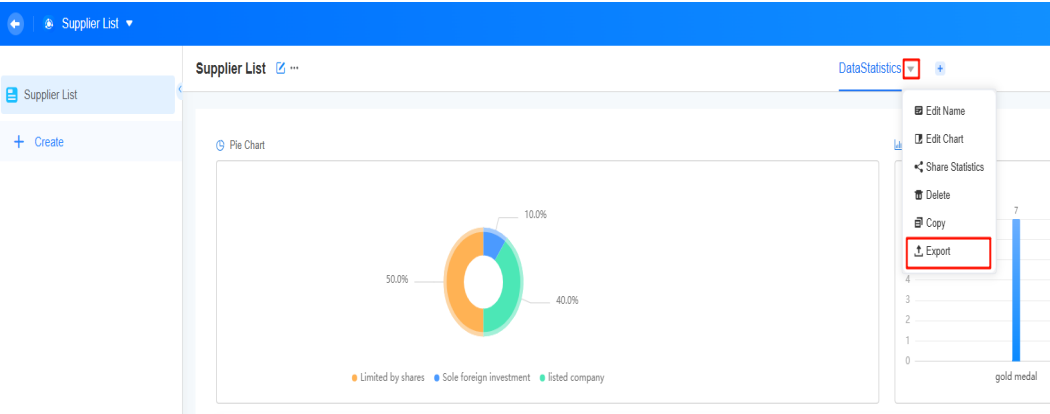
The exported data report is a **PNG image**.

Figure 6-107 Exporting a data report (runtime)



You can also click the edit button in the upper right corner of the application development page to go to the page for editing the application. Click ▼ next to the data report and choose to export the data report.

Figure 6-108 Exporting a data report (development)



----End

7 Configuring Application Role Permissions

7.1 Application Role Permission Overview

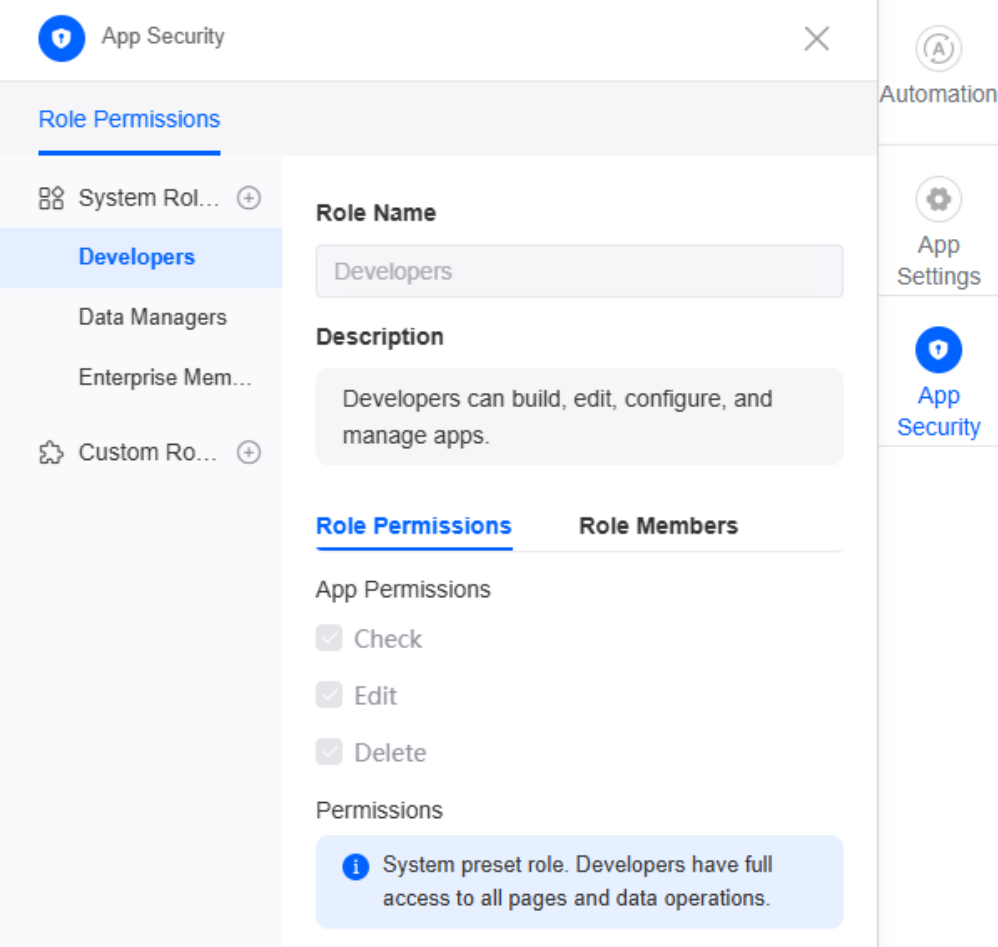
To create an application, different roles work together. Each role can do different things with data. The platform has two types of roles: preset system roles and custom roles. You can give users roles based on what they need to do.

- **System Roles:** **Developers**, **Data Managers**, and **Enterprise Members** are preset on the no-code workbench.
- **Custom Roles:** If the preset roles cannot meet your needs or you need more refined control, you can customize roles. There are two types of custom roles: **system-level** and **application-level**. System-level custom roles apply to **all applications**, while application-level custom roles are valid only for the **current application**.

System Roles

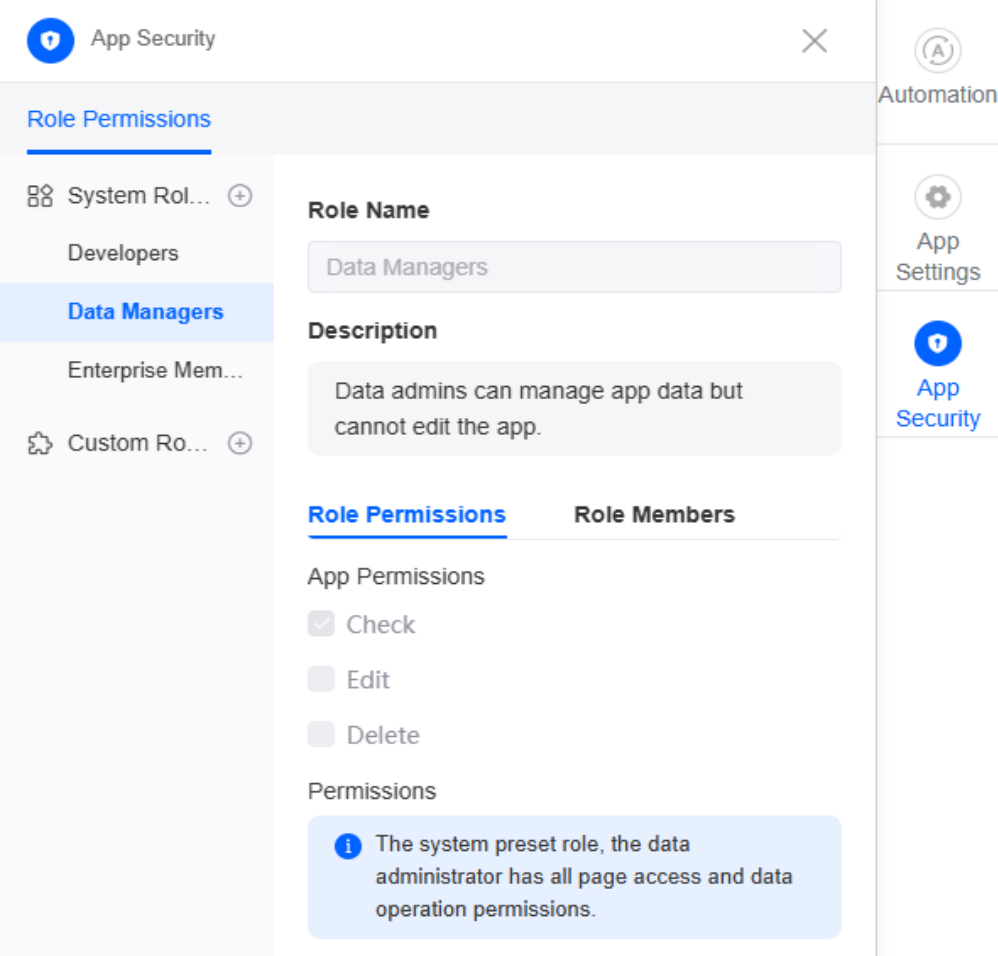
- **Developers:** This role can create, view, edit, and delete no-code applications and manage all application data. It matches the **NoCode Developer Profile** under **Configuration > User Security > Profiles**.

Figure 7-1 Developers



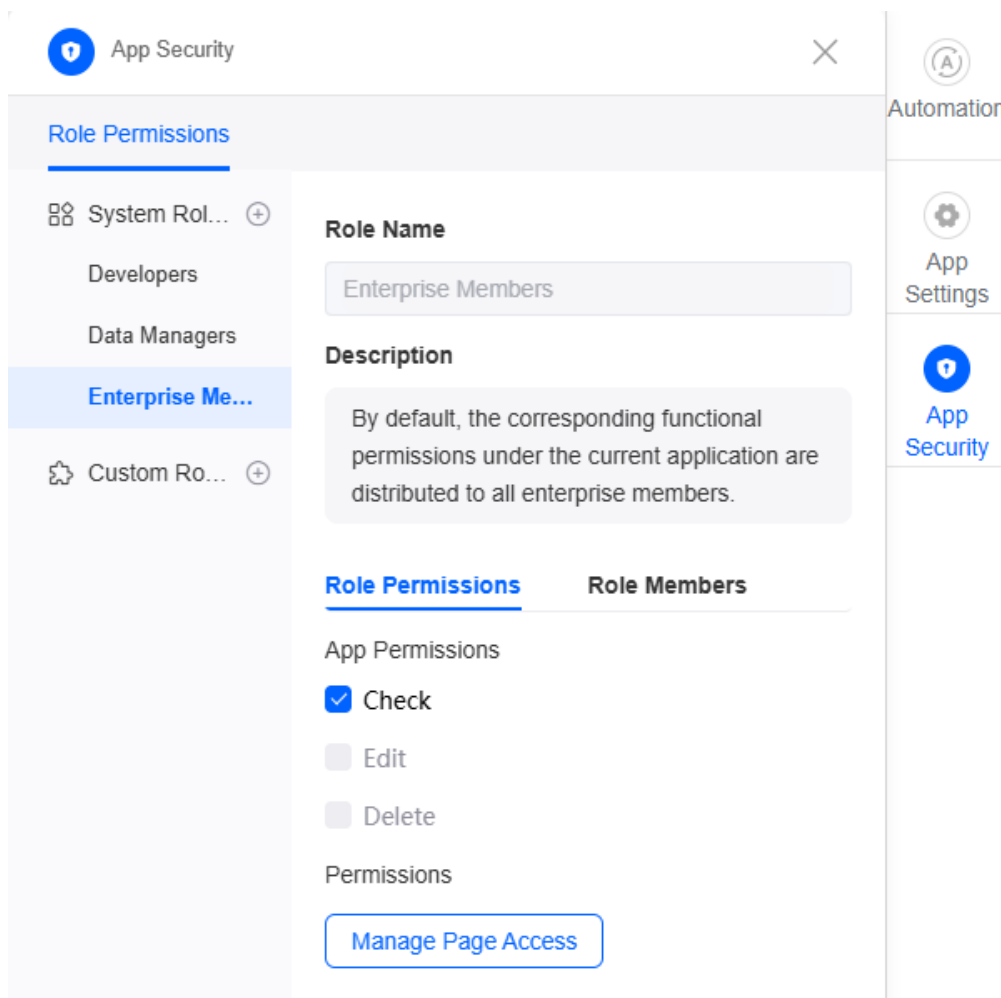
- **Data Managers:** This role can manage all data related to no-code applications, and view all forms and views by default but cannot create, edit, or delete applications. It matches the **NoCode Manager Profile** under **Configuration > User Security > Profiles**.

Figure 7-2 Data Managers



- **Enterprise Members:** This role can access the no-code workbench and fill in and submit forms, but cannot create, edit, or delete applications. It matches the **Portal User Profile** under **Configuration > User Security > Profiles**.

Figure 7-3 Enterprise Members

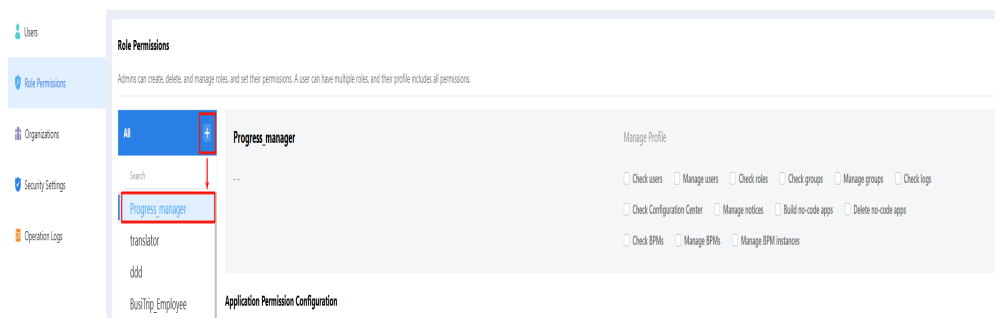


Custom Roles

- Customizing **system-level** roles

On the **Configuration Center > Role Permissions** page, an application administrator can customize roles and set permissions for the roles. **Roles created in the configuration center can be used in all applications.**

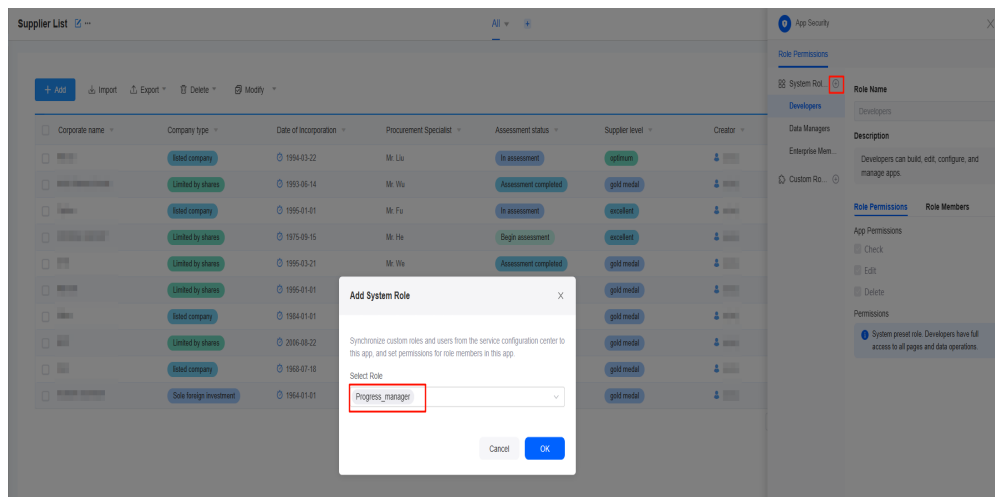
Figure 7-4 Customizing a system-level role



For example, create a process manager role and give it permissions by referring to [Customizing a System-Level Role](#). The roles created here can be

selected in **App Security > Role Permissions > System Roles** of all applications.

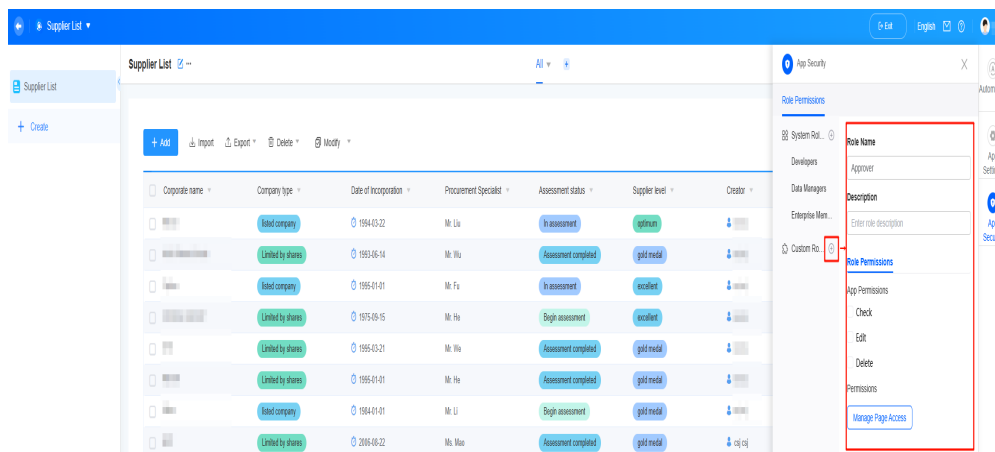
Figure 7-5 Adding a system-level role



- Customizing **application-level** roles

In addition to system-level custom roles, you can customize application-level roles. You can use these roles to let users access certain pages in the applications.

Figure 7-6 Adding application-level roles



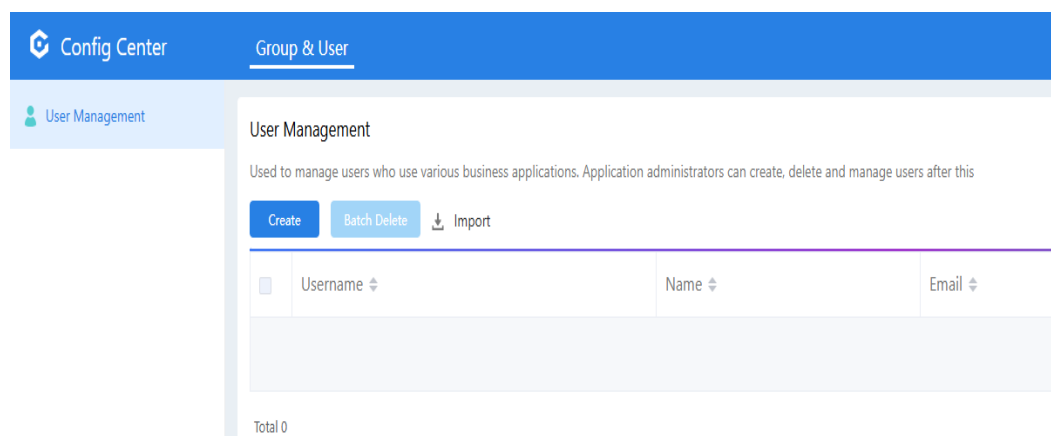
7.2 Customizing a System-Level Role

In addition to the three system roles: no-code developer, data manager, and enterprise member, application administrators can customize roles.

Constraints

The configuration center of the free edition provides only the user management menu. Buy the standard or professional edition to customize roles.

Figure 7-7 Configuration center of the free edition instance



Procedure


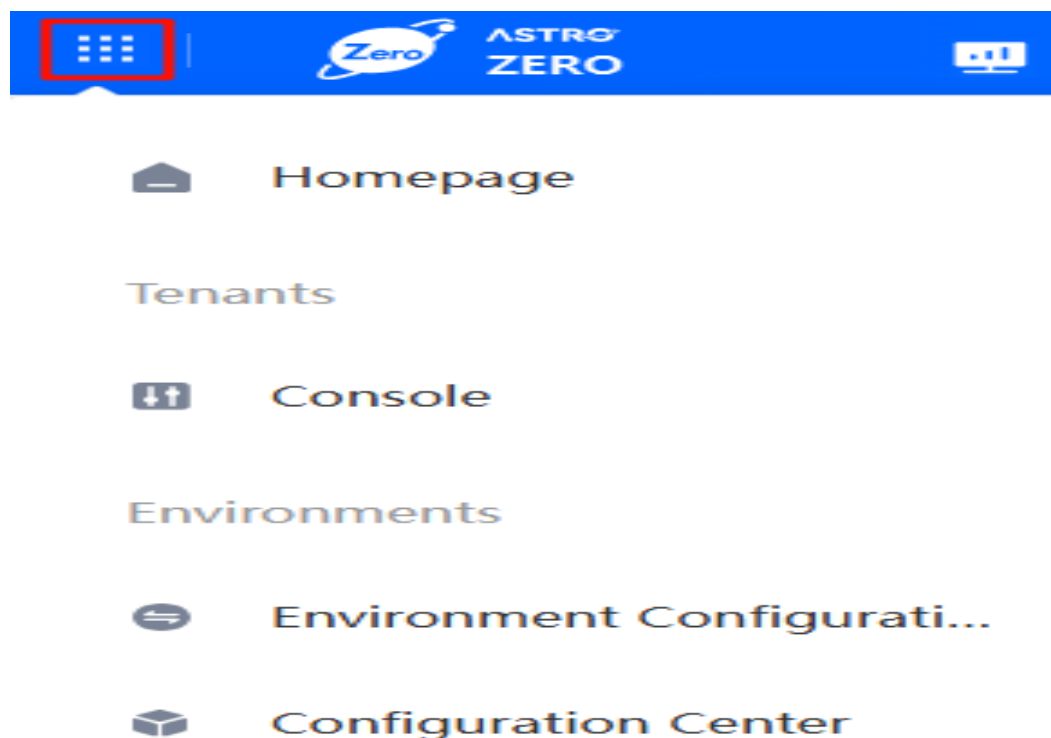
- Step 1** Log in to the [Huawei Cloud Astro Zero console](#) as a developer and click **Access Homepage**.
- Step 2** On the top menu bar, click **Workbench**.
- Step 3** Click  in the upper left corner of the page and choose **Environments > Configuration Center**. See [Figure 7-8](#).

Figure 7-8 Accessing the configuration center



Step 4 On the **Organizations & Users** page, choose **Role Permissions** from the navigation pane.


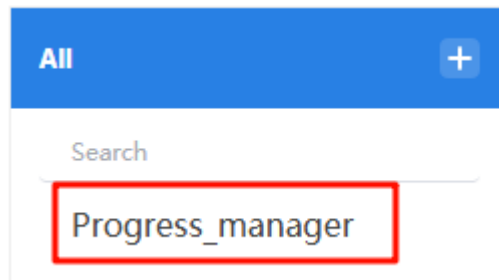
Step 5 Click  on the right of **All** and enter a role name to create a role.

Figure 7-9 Creating a role




Step 6 In the **Manage Profile** area, click  to set permissions for the role.

Figure 7-10 Setting permissions for the role

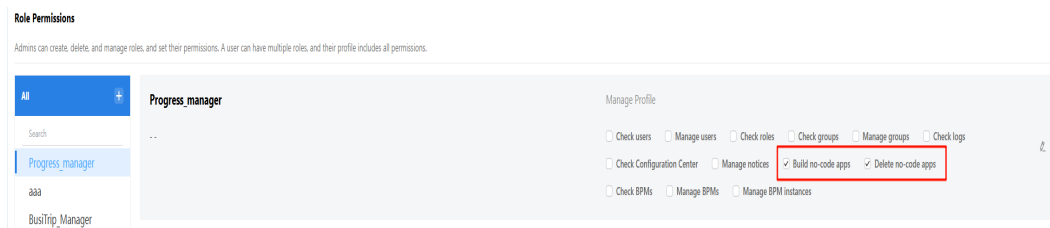


Table 7-1 Permission description

Permission	Description
Check users	You can check the profiles of all portal users created in the service configuration center. You can access Configuration Center > Organizations & Users > Users , but cannot create, delete, or edit portal users.
Manage users	If checked, Check users and Check roles are checked by default. You can create, delete, and edit portal users in Configuration Center > Organizations & Users > Users and access Role Permissions .
Check roles	You can check the profiles of all roles created in the service configuration center. You can create, delete, and edit roles in Configuration Center > Organizations & Users > Role Permissions .
Check organizations	You can check the profiles of all organizations created in the service configuration center. You can access Configuration Center > Organizations & Users > Organizations , but cannot create, delete, or edit portal users.

Permission	Description
Manage organizations	If checked, Check roles , and Manage organizations are checked by default. You can create, delete, and edit organizations in Configuration Center > Organizations & Users > Organizations and access Role Permissions .
Check logs	You can access Configuration Center > Organizations & Users > Operation Logs to check logs of all users of the same tenant.
Check Configuration Center	You can access Configuration Center from the no-code workbench and check related functions of this module.
Manage notices	You can post, edit, or delete notices.
Build no-code apps	You can build no-code applications.
Delete no-code apps	You can delete no-code applications.
Check BPMs	You can check BPMs in no-code applications.
Manage BPMs	You can edit and delete BPMs in no-code applications.
Manage BPM instances	You can check, edit, and delete BPM instances in no-code applications.

----End

Related Documents

- After a role is created, you can add users to the role. For details, see [Adding Users to a System-Level Role](#).
- After adding users to a role, the application creator can invite the added users to manage applications and backend data. For details, see [Activating a User in an Application](#).

7.3 Customizing an Application-Level Role

You can create application-level custom roles for each application. These roles are **valid only for that application**. You can use them to let users check or use certain pages in the application.

The following uses the application editor role as an example to show how to customize an application-level role. An application editor has the following permissions:

- App permissions: View and edit applications.
- App item permission: Access the "Supplier List" form and "Supplier Annual Assessment View" in the application, but cannot view the **All** view.

- Role members: Add user like Zhang San as an application editor. Zhang San is an enterprise user.

Procedure

Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 On the right of the page, click **App Security**.

Step 4 Add a custom role to the application.


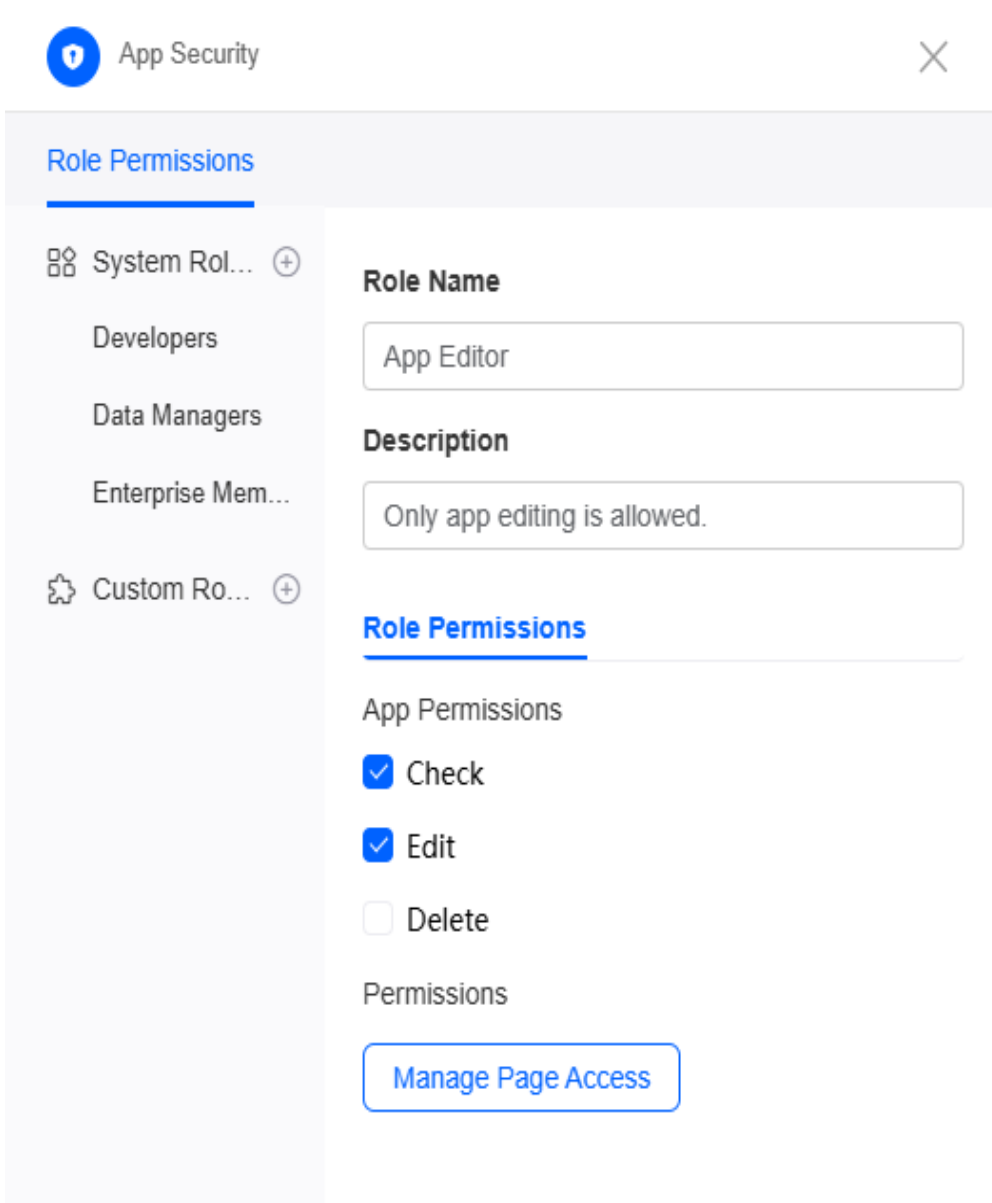
1. Click  next to **Custom Roles**, set the role name, description, and role permissions.

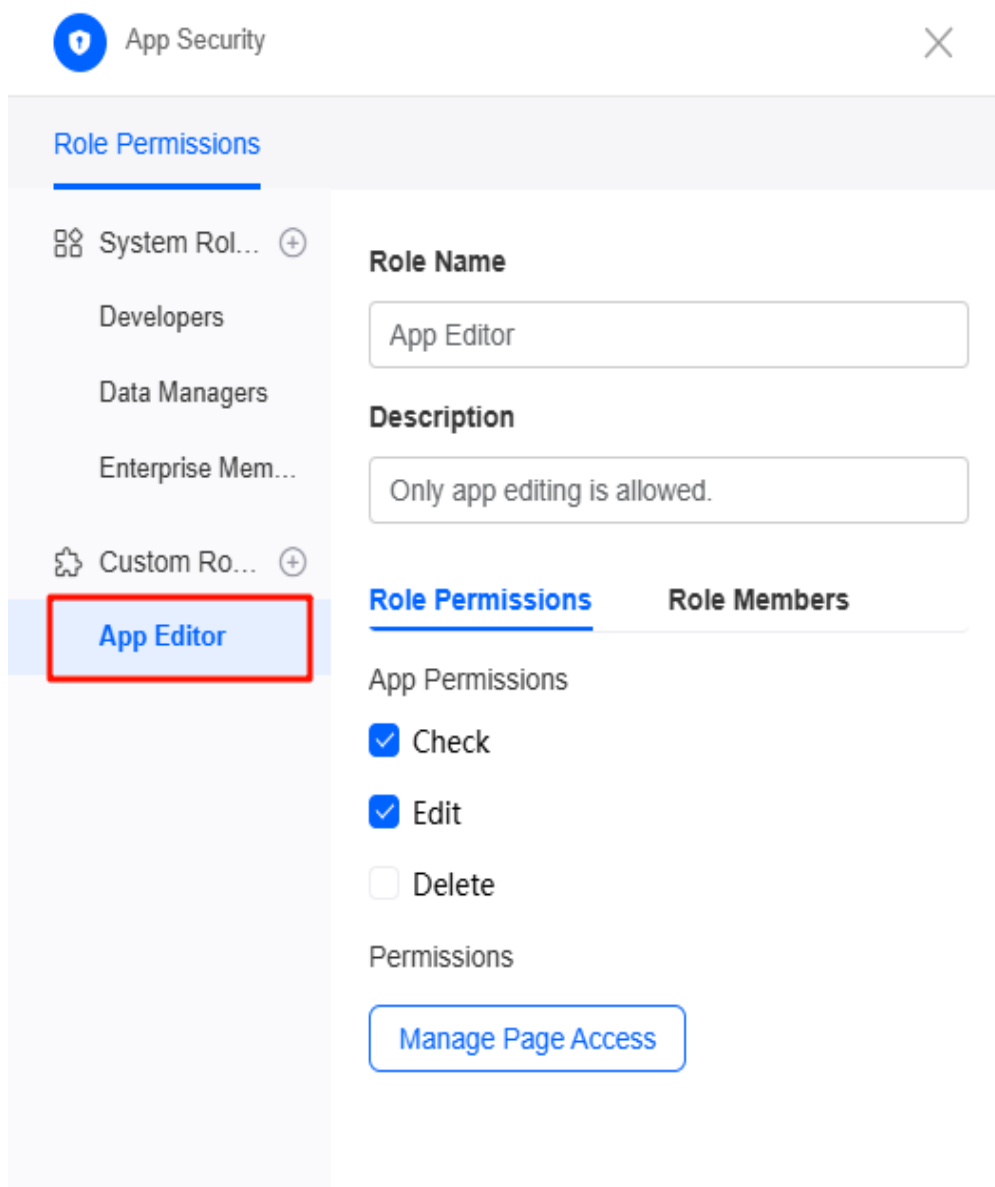
Figure 7-11 Customizing an application-level role



The screenshot shows the 'App Security' dialog box with a close button (X) in the top right corner. The 'Role Permissions' tab is selected. On the left, there are two sections: 'System Roles' with a list of 'Developers', 'Data Managers', and 'Enterprise Mem...', and 'Custom Roles' with a plus icon. The main area is for configuring a custom role. It has a 'Role Name' field containing 'App Editor', a 'Description' field containing 'Only app editing is allowed.', and a 'Role Permissions' section. Under 'App Permissions', there are three checkboxes: 'Check' (checked), 'Edit' (checked), and 'Delete' (unchecked). At the bottom, there is a 'Permissions' section with a 'Manage Page Access' button.

2. Click **Save**. The custom role is created.
You can view the created role in the custom role list on the left.

Figure 7-12 Viewing the created custom role

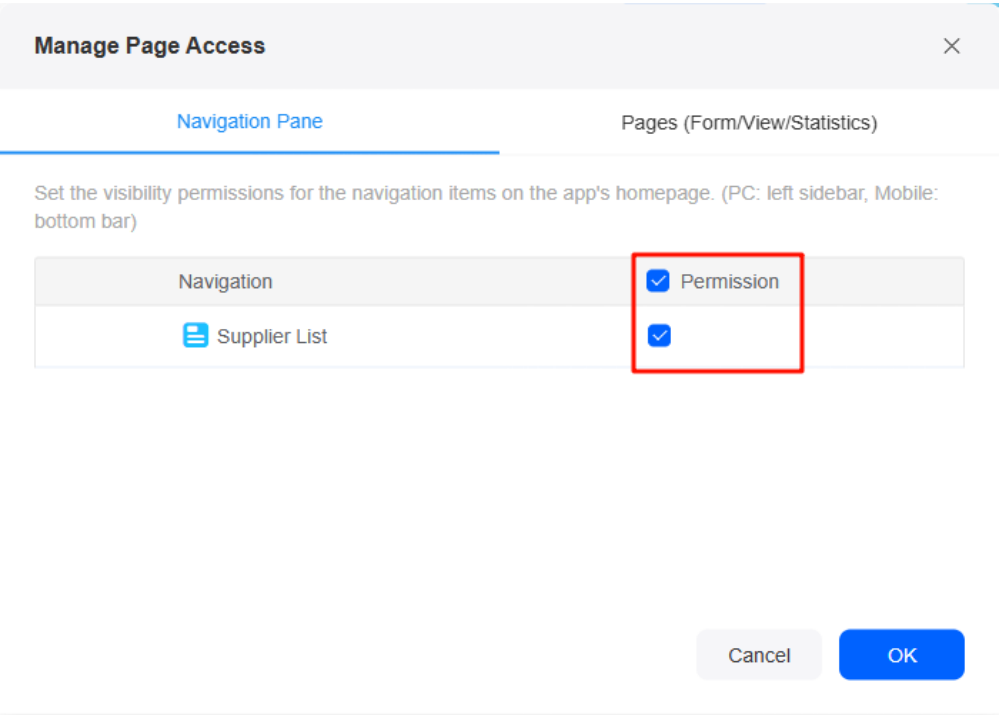


Step 5 Set the application item permission for the role.

You can give role members permission to access specified pages in an application by setting it up in the **Permissions** area.

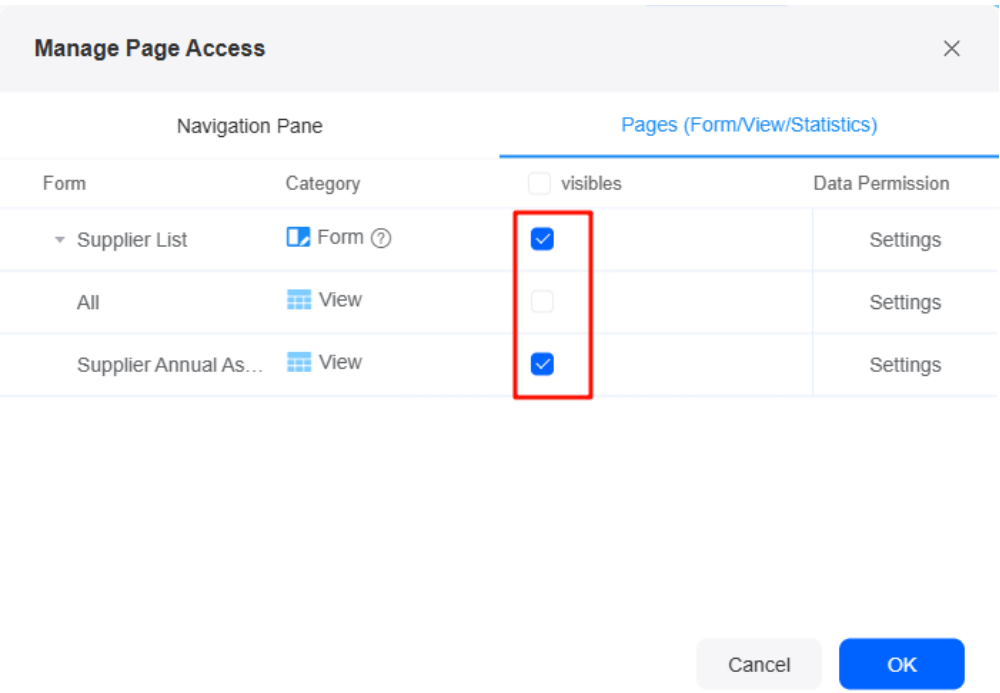
1. Click the custom role (for example, "Application editor") and click the **Role Permissions** tab on the right.
2. Click **Manage Page Access** under **Permissions**.
3. In the **Navigation Pane** tab page, set the permissions to view navigation items on the homepage of the current application.

Figure 7-13 Setting the permissions to view navigation items



4. In the **Pages (Form/View/Statistics)** tab page, set the permission to view and edit forms, views, and statistics, and click **OK**.
- For example, the application editor can view only the "Supplier Annual Assessment" view in the application, but cannot view the **All** view. Under **Data Permission**, click **Settings** to set what the role can do with the data.

Figure 7-14 Setting the permission to view a single page



Step 6 Add a user to the role.

The users added here are portal users created in the configuration center. A portal user is an application user. On the platform, you can give a portal user developer permission so they can help with application development.

1. On the **Role Members** tab page, click **Add**.
2. Select the target user by member or role and click **OK** to return to the roles and members page.

Members and roles to be added must be created in the configuration center in advance. For details, see [Customizing a System-Level Role](#) and [Adding Users to a System-Level Role](#).

Figure 7-15 Selecting a user by member

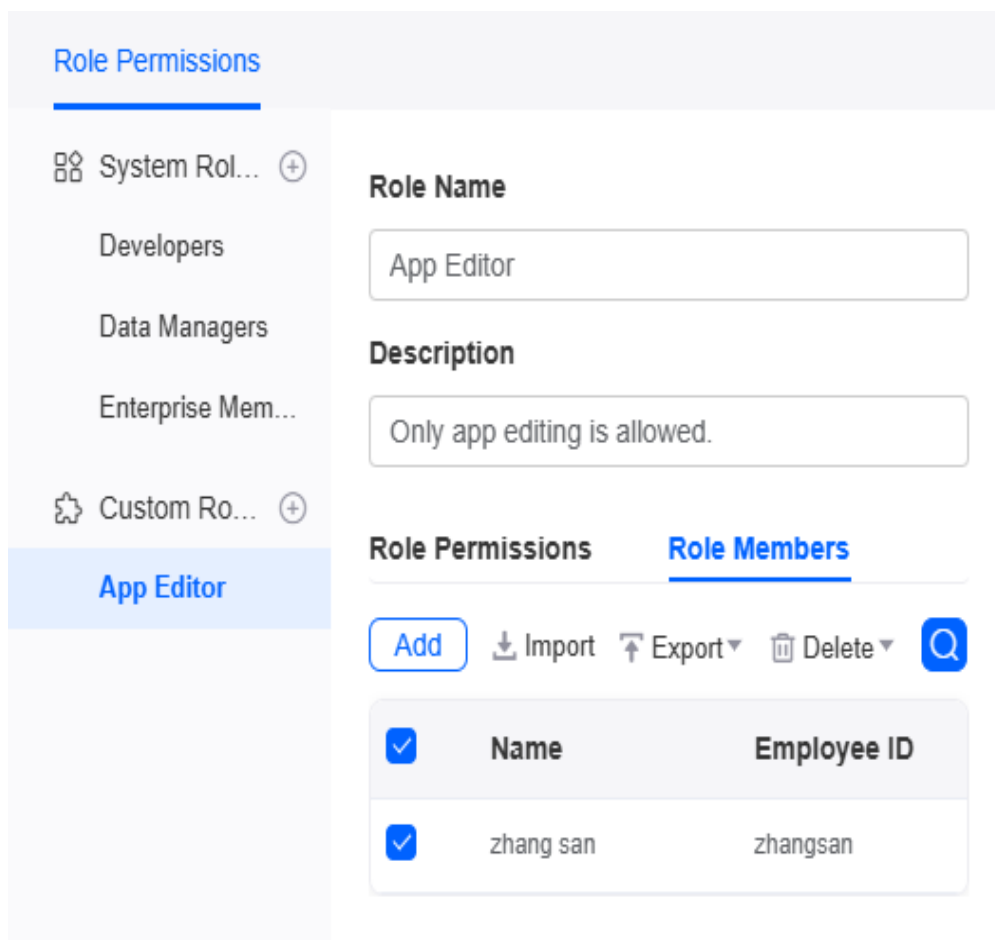
The screenshot shows a dialog box titled "Specific Member" with a close button (X) in the top right corner. Inside the dialog, there are two tabs: "Member" (selected) and "Role". Below the tabs is a search bar containing the text "zhang san". Below the search bar is a list of search results, with the first item being "zhang san zhangsan" and a checkbox to its left. At the bottom left of the dialog, it says "(Selected: 0)". At the bottom right, there are two buttons: "Cancel" and "OK".

Figure 7-16 Selecting a user by role

The screenshot shows a dialog box titled "Specific Member" with a close button (X) in the top right corner. Inside the dialog, there are two tabs: "Member" and "Role" (selected). Below the tabs, there are two radio buttons: "Custom roles" and "System roles" (selected). Below the radio buttons is a search bar containing the text "Please enter name". Below the search bar is a list of search results, with the first item being "Enterprise Member" and a checkbox to its left. Below "Enterprise Member" are two more items: "Developer" and "Data Manager", each with a checkbox to its left. At the bottom left of the dialog, it says "(Selected: 0)". At the bottom right, there are two buttons: "Cancel" and "OK".

3. In the user list, click **Save**.

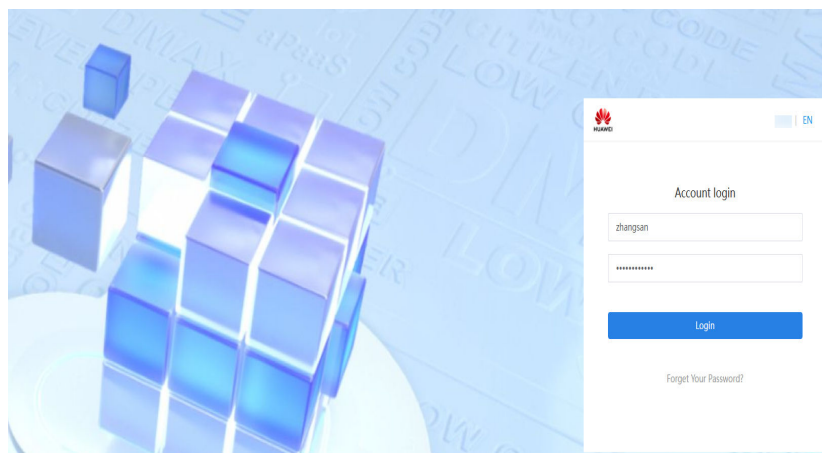
Figure 7-17 Adding a user



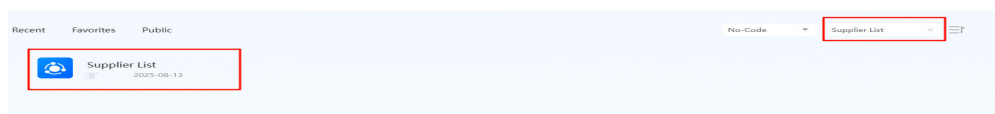
Step 7 Check whether the application-level role is added.

1. Log in to the no-code workbench as a member of the role (for example, Zhang San) by referring to [Logging In to the No-Code Workbench](#).

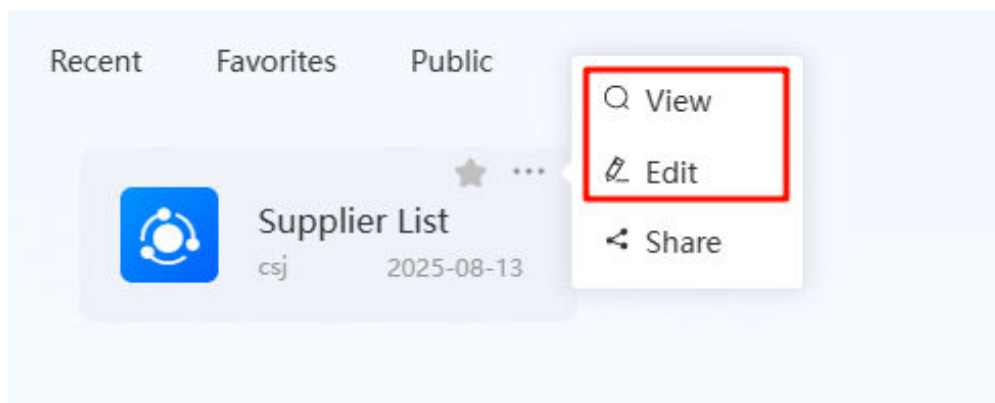
Figure 7-18 Entering the account name and password



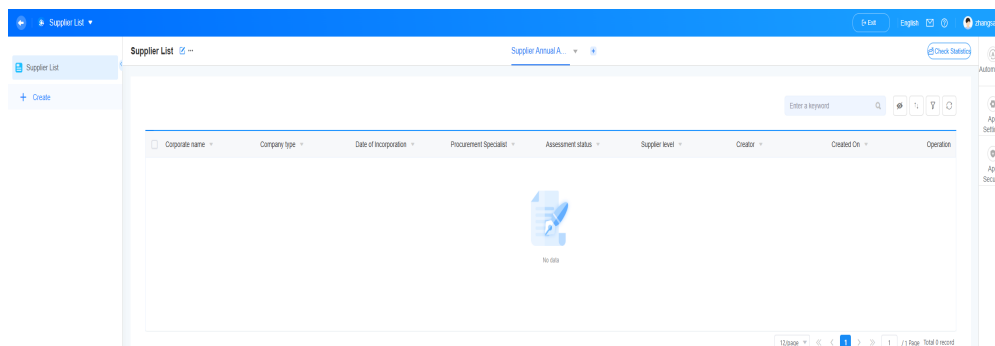
2. Click **All Apps**. On the **All** tab page, you can view the target application.

Figure 7-19 Viewing the supplier list application

3. Move the cursor to the application and click . The **View** and **Edit** buttons are displayed.

Figure 7-20 View button

4. Click **Edit**. The application editing page is displayed, and only the "Supplier Annual Assessment View" can be viewed.

Figure 7-21 Application editing page

----End

7.4 Adding Users to a System-Level Role

Application administrators can manage users in the configuration center, including adding, deleting, and assigning roles. These users are portal users, who typically use applications. On the no-code workbench's configuration center, you can give portal users roles to let them develop and manage no-code applications. For example, if Zhang San is given developer permissions for department A, he can log in to the workbench and start developing.

Adding a User to a Role


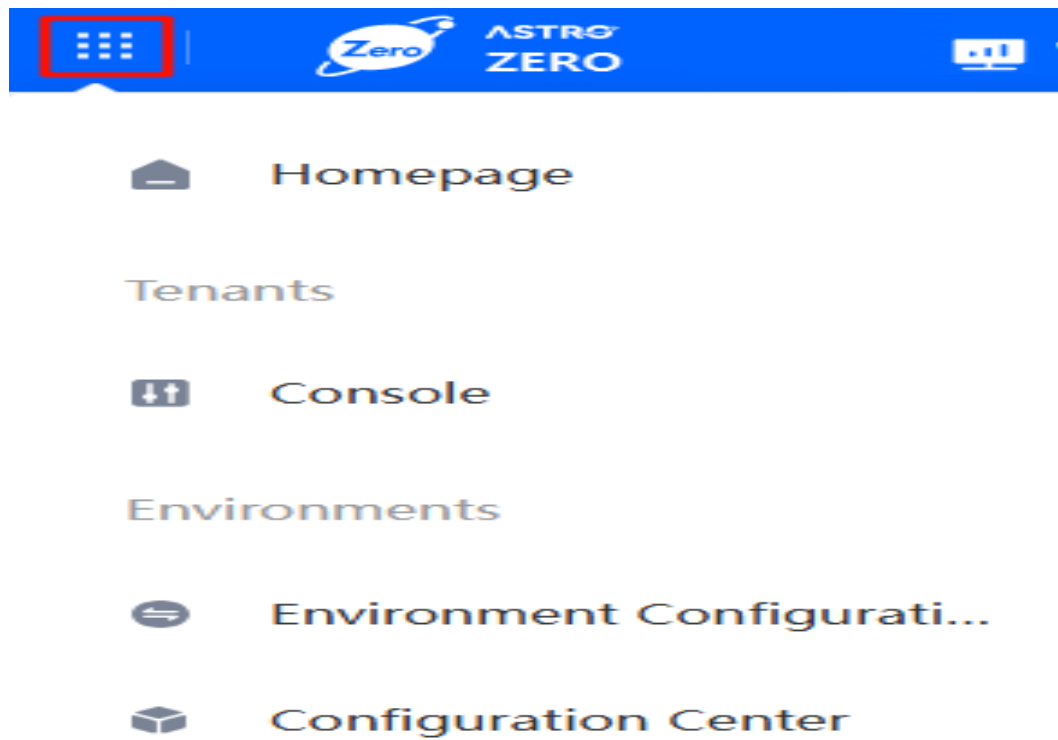
- Step 1** Log in to the [Huawei Cloud Astro Zero console](#) as a developer and click **Access Homepage**.
- Step 2** On the top menu bar, click **Workbench**.
- Step 3** Click  in the upper left corner of the page and choose **Environments > Configuration Center**. See [Figure 7-22](#).

Figure 7-22 Accessing the configuration center



- Step 4** On the **Organizations & Users** page, choose **Users** in the navigation pane.
- Step 5** Click **Create User**, enter user information, and assign roles to the user.

Figure 7-23 Setting user information

New User

Basic Information

* Username

zhangsan

* Email

zhangsan@

* Password

* Name

zhangsan

Phone Number

Please input

* Confirm Password

User Setting

* Language

English

Time Zone

(GMT+08:00) China Standard Time (Asia/Shanghai)


Under **Roles**, choose a role and click  to assign the related permissions to the user.

Figure 7-24 Assigning a role to a user

Roles

Roles1/12

☐ Anonymous User

☐ Low-code developer

☐ No-code developer

☐ Data manager

☐ dev


☐ BusTrip_Employee

☐ BusTrip_Manager

☐ Progress_manager

☒ Developer_in_department_A

<



>

Selected Roles0/0

No data

Table 7-2 Parameters for creating a user

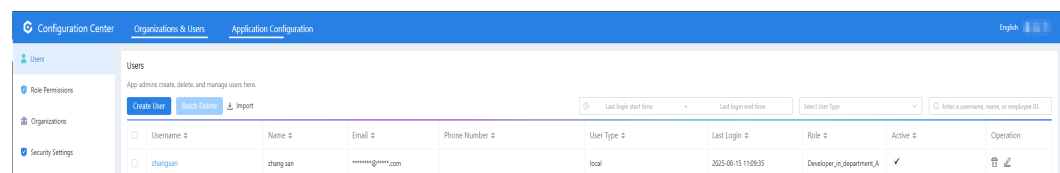
Parameter	Description
Username	The username is unique. It cannot be changed after creation. Naming rules: <ul style="list-style-type: none">Enter up to 100 characters.The username cannot contain spaces or special characters except !@\$_-.
Name	User name. The value contains a maximum of 64 characters.
Email	Email address for the new user. Used for system communication, like identity verification, password reset, and notifications.

Parameter	Description
Phone Number	Phone number for the new user. Like the email address, it is used for system communication. Email is required while the phone number is optional.
Password	Login password. The password must be 8 to 16 characters and include at least two types of characters: uppercase letters, lowercase letters, digits, or special characters. Weak passwords are not allowed.
Confirm Password	Enter the login password again. The two passwords must be the same.
Language	Select the language used by the user to improve user experience and ensure that the user can understand the prompts, messages, and documents in the system.
Time Zone	Time zone of the user. Once the time zone is set, the platform will adjust the display time accordingly. This helps users understand the time information easily.
Roles	Assign roles to new users. Each role gives them certain permissions. This helps clearly define what each user can do, prevents permission conflicts, and keeps the system secure. By default, portal users have the enterprise member role and can access applications only to fill in questionnaires. For details, see Logging In to the Application As a Portal User and Submitting a Questionnaire .

Step 6 Click the save button. The role is added.

Return to the user management page. The added user is displayed in the user list.

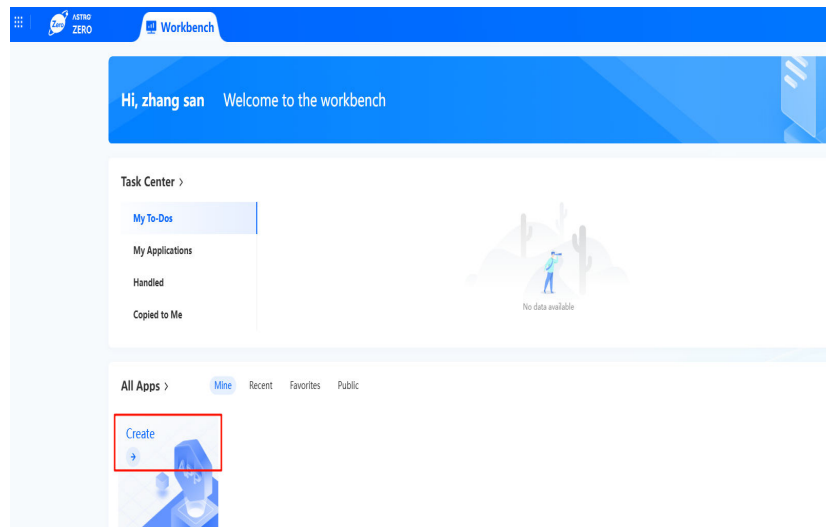
Figure 7-25 Viewing the added portal user



Step 7 Check if the user is created and if the permissions are correct.

See [Logging In to the No-Code Workbench](#) to log in to the no-code workbench to develop no-code applications. When you log in for the first time, change the initial password when prompted.

Figure 7-26 Logging in to the workbench to develop no-code applications



----End

Related Documents

- Roles have specific permissions. When a user is assigned a role, they gain those permissions. You can also give users specific permissions for certain tasks in an application. This helps the application creator manage the application and its data. For details, see [Activating a User in an Application](#).
- In addition to creating portal users in the configuration center, you can also synchronize users from WeLink to the platform as portal users. For details, see [Synchronizing Departments and Users from WeLink](#).

7.5 Activating a User in an Application

After adding a user to a role, the application creator can invite the added user to manage the application and backend data.

Prerequisites

You have added the corresponding portal user by referring to [Adding Users to a System-Level Role](#).

Constraints

There are two types of users in Huawei Cloud Astro Zero: users and portal users.

- Users have two profiles: **System Administrator Profile** (with full platform permissions) and **Developer Profile** (with permissions to develop applications on the no-code workbench).
- Portal users have one profile: **Portal User Profile**. They can only use the no-code workbench. To give them more permissions, activate them in an application. If no extra permissions are set, they get the default enterprise member permissions.

Procedure

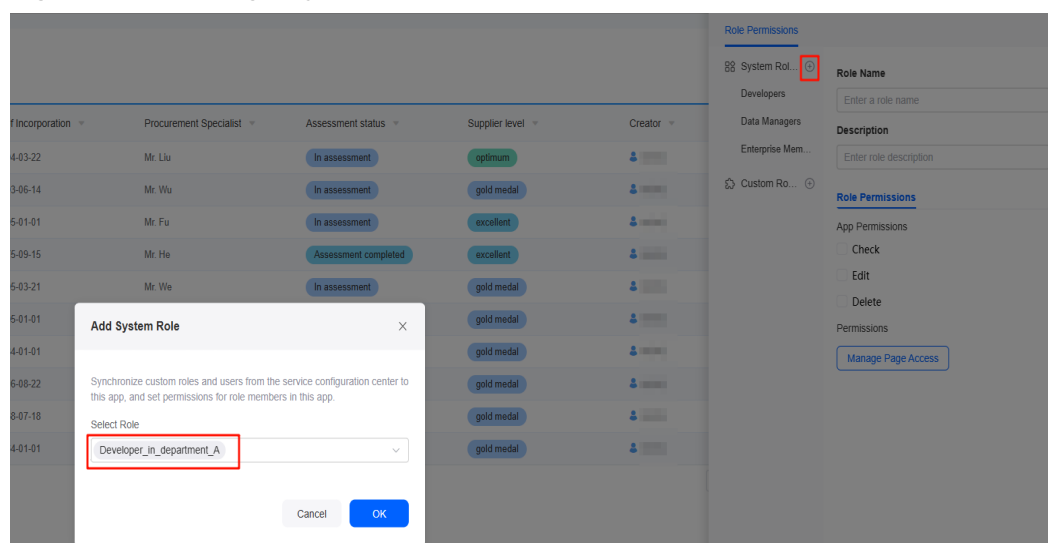
Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 On the right menu of the page, click **App Security** and select a system role.

The following uses the portal user created in [Adding Users to a System-Level Role](#) as an example and shows how to assign the role created in [Customizing a System-Level Role](#) to this portal user.

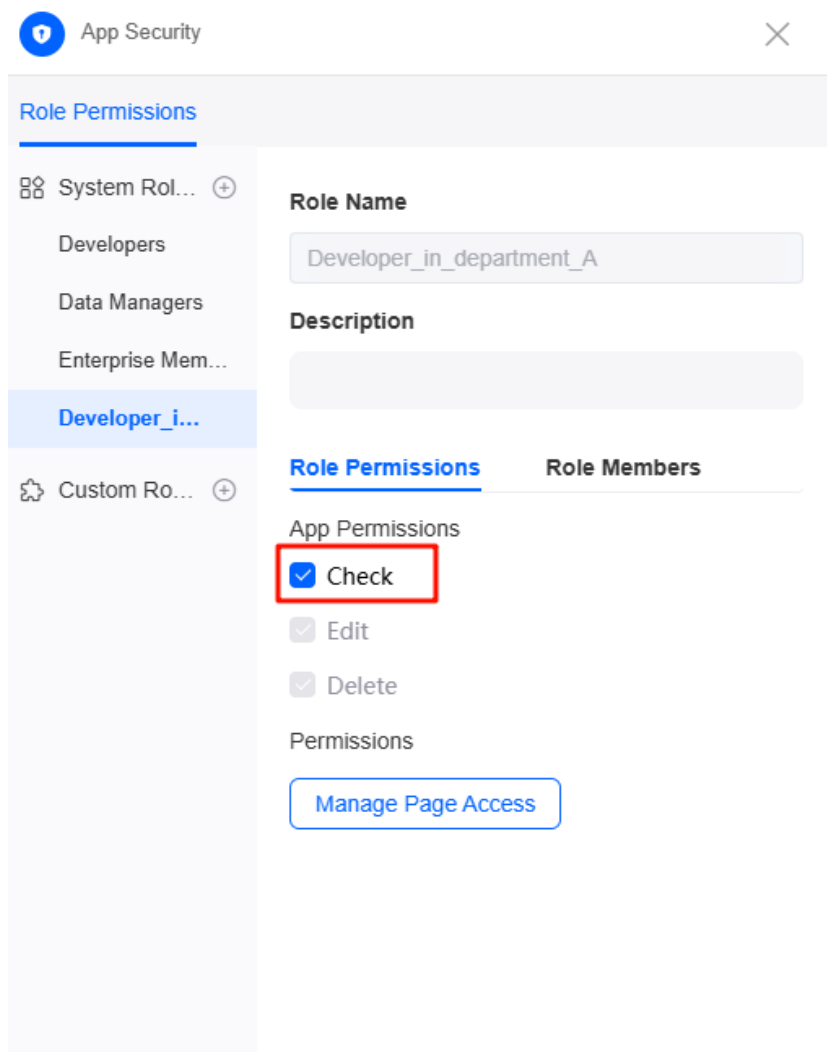
Figure 7-27 Adding a system role



Step 4 Click the developer of department A. On the **Role Permissions** tab page, select required permissions and click **Save**.

1. Choose **Role Permissions** > **App Permissions**, and select **Check**. Then the role can view the application.

Figure 7-28 Granting the Check permission to the user



2. Choose **Role Permissions** > **Permissions** and click **Manage Page Access**.
3. In the navigation path area, set the permissions to view navigation paths on the homepage of the current application.

Figure 7-29 Setting the permissions to view navigation items

Manage Page Access

Navigation Pane

Pages (Form/View/Statistics)

Set the visibility permissions for the navigation items on the app's homepage. (PC: left sidebar, Mobile: bottom bar)

Navigation	<input checked="" type="checkbox"/> Permission
Supplier List	<input checked="" type="checkbox"/>

Cancel

OK

4. In the **Pages (Form/View/Statistics)** tab page, set the permission to view and edit forms, views, and statistics, and click **OK**.

Figure 7-30 Setting the permission to view a single page

Manage Page Access

Navigation Pane

Pages (Form/View/Statistics)

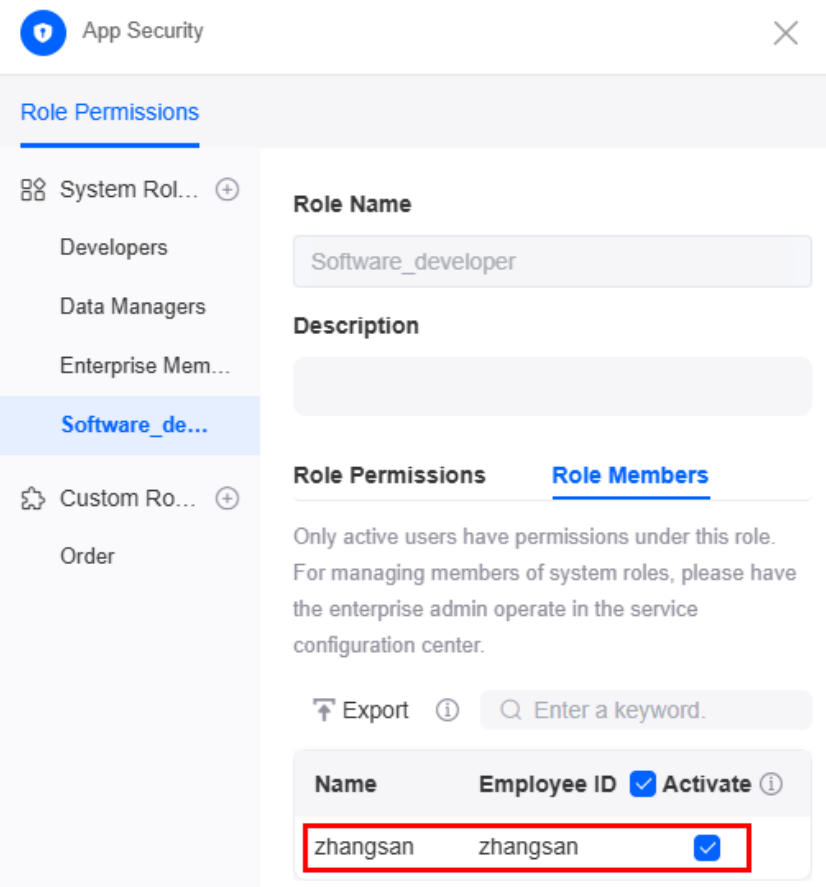
Form	Category	<input checked="" type="checkbox"/> visibles	Data Permission
▼ Supplier List	Form ?	<input checked="" type="checkbox"/>	Settings
All	View	<input checked="" type="checkbox"/>	Settings
DataStatistics	Statistics	<input checked="" type="checkbox"/>	Settings

Cancel

OK

Step 5 Click the developer of department A. On the **Role Members** tab page, select the user to be activated and click **Save**.

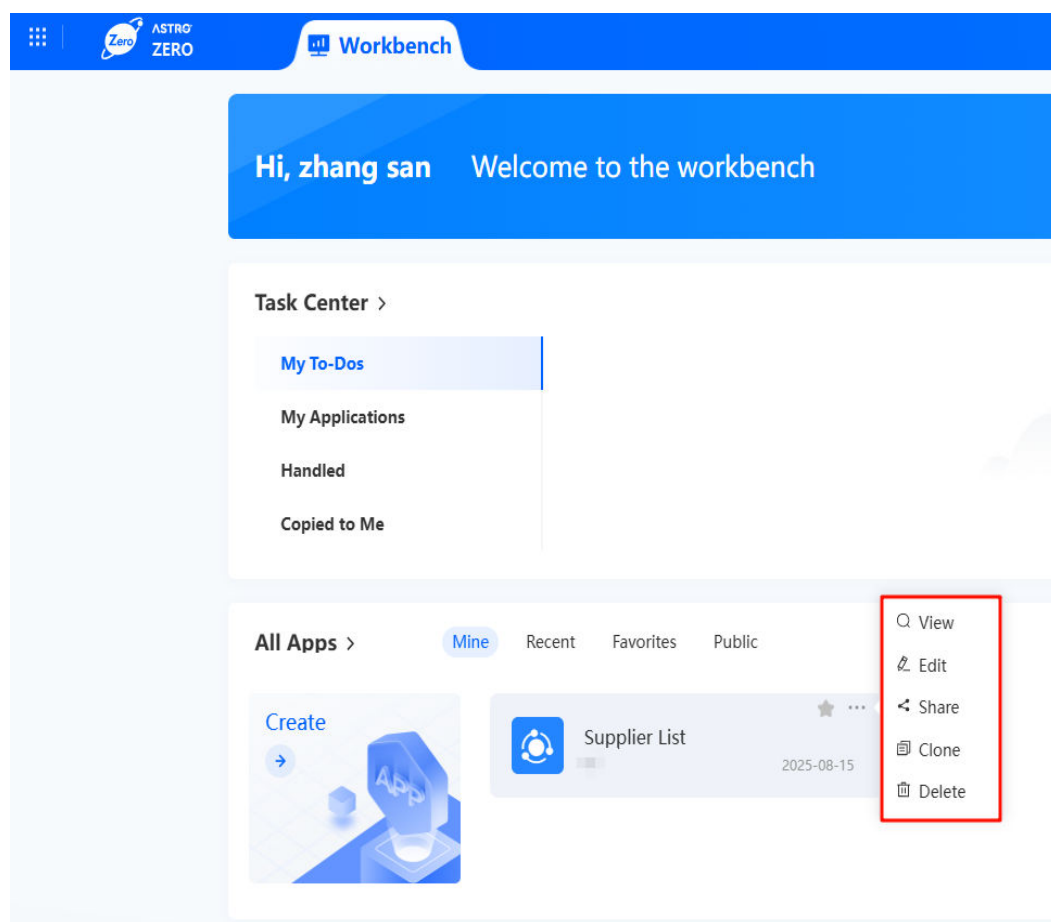
Figure 7-31 Selecting a user



Step 6 Check whether the user is activated.

Portal users can log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#) to assist application creators in application development and management.

Figure 7-32 Assisting application creators to manage applications



----End

7.6 Logging In to the Application As a Portal User and Submitting a Questionnaire


A portal user is a user who uses service applications. After an application is developed on Huawei Cloud Astro Zero, you can share the application access address with portal users. Portal users can use the address to log in to the application and fill in the questionnaire.

Modifying the Domain Name of the Runtime Environment

Huawei Cloud Astro Zero gives a default domain name for the current environment. Portal users can use the domain name to access no-code applications. You can also customize domain names for different applications as needed.

- Step 1** Log in to the [Huawei Cloud Astro Zero console](#) using the **same account you used to enable Huawei Cloud Astro Zero**.
- Step 2** On the homepage, click **Access Homepage**. The application development page is displayed.

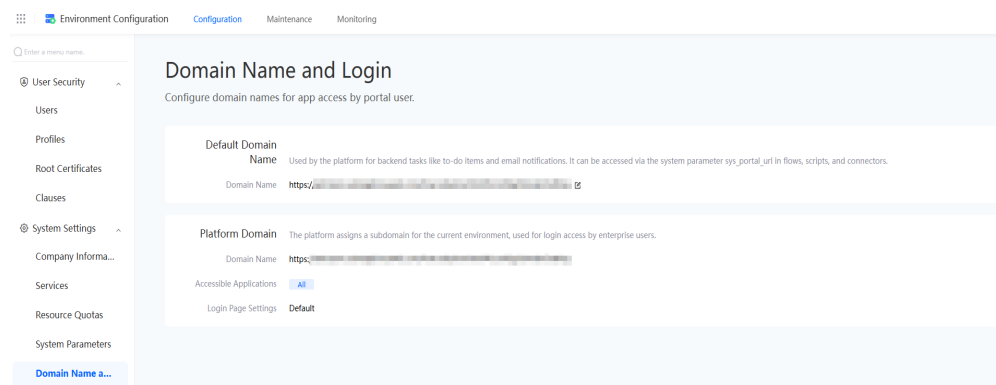
Step 3 On the top menu bar, click **Workbench**.

Step 4 Click  in the upper left corner of the page and choose **Environments** > **Environment Configuration**.

Step 5 In the navigation pane, choose **System Settings** > **Domain Name and Login**.

Step 6 Check the domain name of the runtime environment in the **Platform Domain** area.

Figure 7-33 Obtaining the domain name of the runtime environment



Step 7 Modify the platform domain name.

1. Click **Edit** next to **Platform Domain**. On the displayed page, edit the domain name and click **Save**.

Go back to the console. You can see that the subdomain name of the runtime environment has been changed. Share the updated domain name with the portal user. The portal user can access the service application's login page.

Figure 7-34 Editing the default domain name

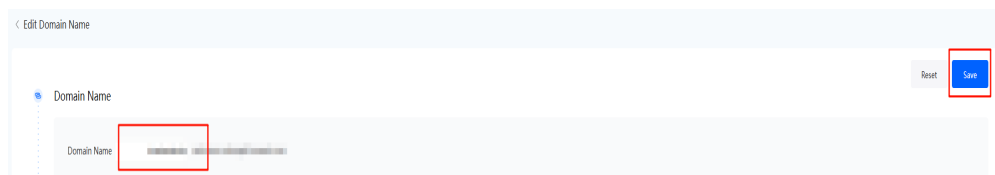
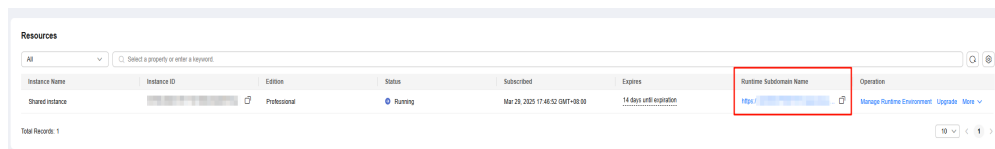


Figure 7-35 Modified subdomain name of the runtime environment



2. Applications for different user types can be deployed in the same runtime environment, with each application having its own login entry.

Figure 7-36 Application visibility settings

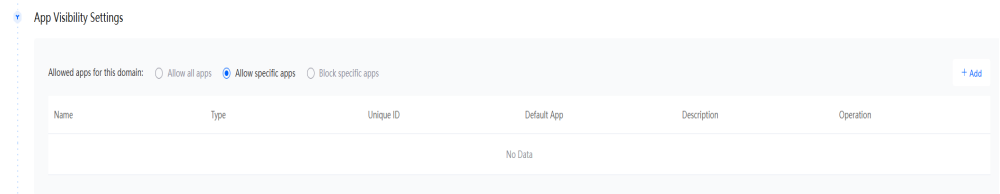


Table 7-3 Application visibility settings



Parameter	Description
Allow all apps	Tenants can access all applications in a single runtime environment designed for the same type of portal user, like enterprise members, using the enterprise's domain name for access.
Allow specific apps	The administrator can whitelist applications that can be accessed via the domain name. These include low-code, no-code, large-screen, and service account applications. While the tenant runtime environment is mainly for enterprise members, some applications are accessible to external users.
Block specific apps	<p>The administrator can blacklist applications that cannot be accessed via the domain name. The tenant runtime environment is usually open to both public and private networks, but some applications can only be accessed from the private network.</p> <p>If an application is not allowed to be accessed via the domain name, all its pages and APIs will be inaccessible via the domain name.</p>

3. Configure the login page of a service application.

Figure 7-37 Default login page settings



Table 7-4 Parameters for configuring the login page of a service application

Parameter	Description
Default	Use the default login page provided by the platform for the application's login. Click  under the logo upload area and  under the custom background image area to change the login logo and background of the default login page. <ul style="list-style-type: none">– Logo: Recommended size: 130 x 130 pixels. File formats: PNG or JPG. Max. size: 1 MB.– Background image: Recommended size: 1390 x 968 pixels. File formats: PNG or JPG. Max. size: 1 MB.
Identity Authentication	Set a third-party login page as the default for the application through unified authentication.
Custom	Use the custom login page. If you choose this option, make sure the custom login page has been developed and deployed as an advanced page.

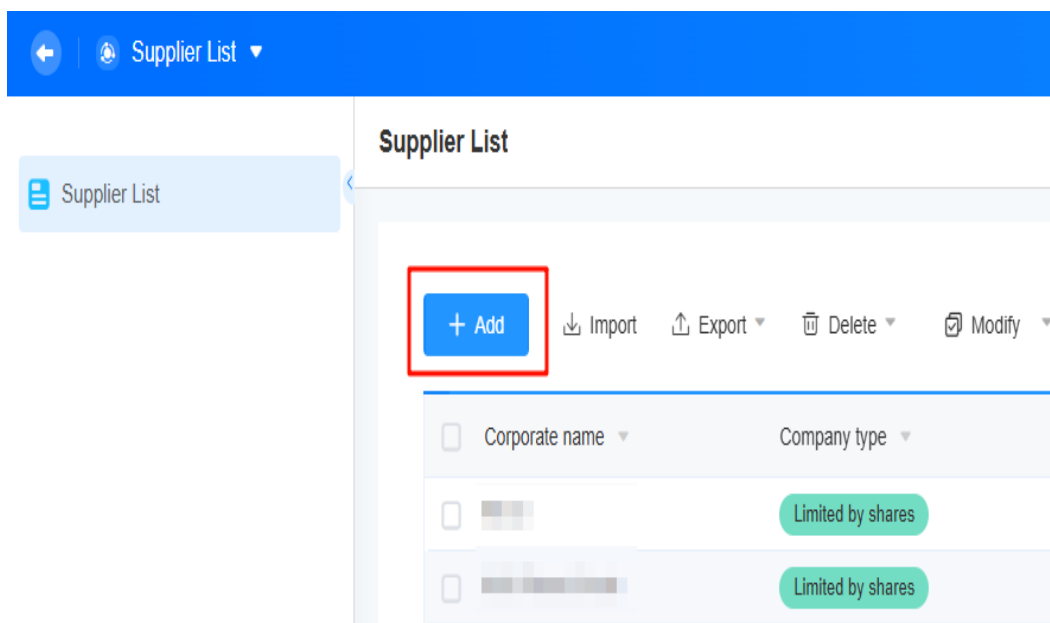
----End

Submitting Questionnaire Data As a Portal User

Developers share a form with portal users. Portal users log in to the system, fill in the form, and submit the form.

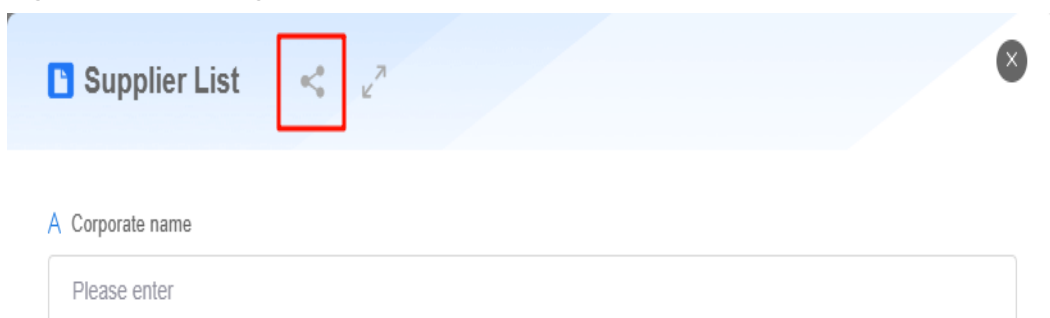
Step 1 After developing an application, click **Add** in the corresponding form.

Figure 7-38 Clicking the add button



Step 2 In the displayed dialog box, click . The form sharing page is displayed.

Figure 7-39 Clicking the share button



Step 3 Copy the access address and share it with portal users.

Figure 7-40 Obtaining the access address

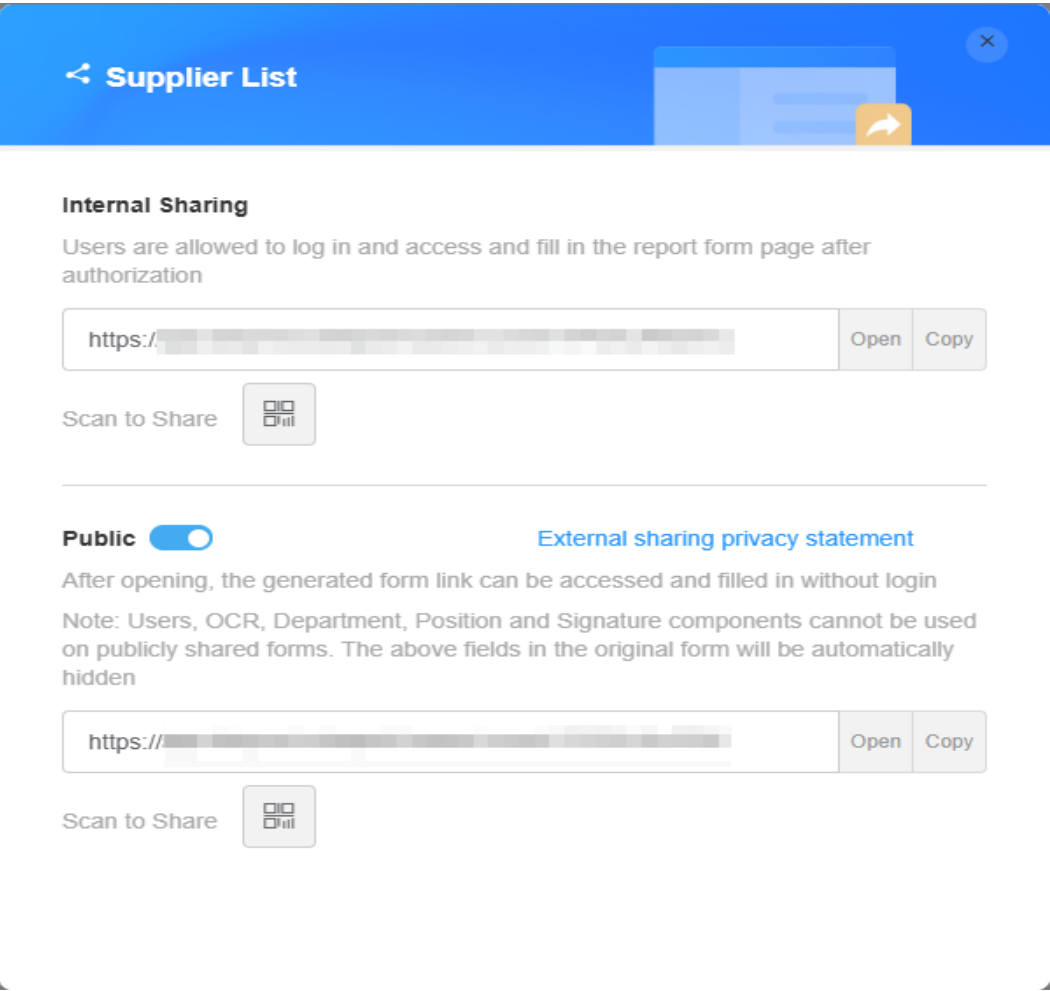


Table 7-5 Parameters for sharing settings

Parameter	Description
Internal Sharing	Share the form with internal users. When this is enabled, internal users can log in to the system and fill in the form. Click Generate Poster in the QR code to create a poster for this form. For details, see Generating a Poster from a Form .
Public	Share the form with external users. Anonymous users can access and fill in the form without login. Click Generate Poster in the QR code to create a poster for this form. For details, see Generating a Poster from a Form .

Step 4 Enter the obtained access address in the browser as a portal user. The login page is displayed.

Step 5 Enter the username and password and click **Login** to enter the form and fill in the questionnaire.

If the address is public, you can access and fill out the questionnaire without logging in.

Figure 7-41 Form login page

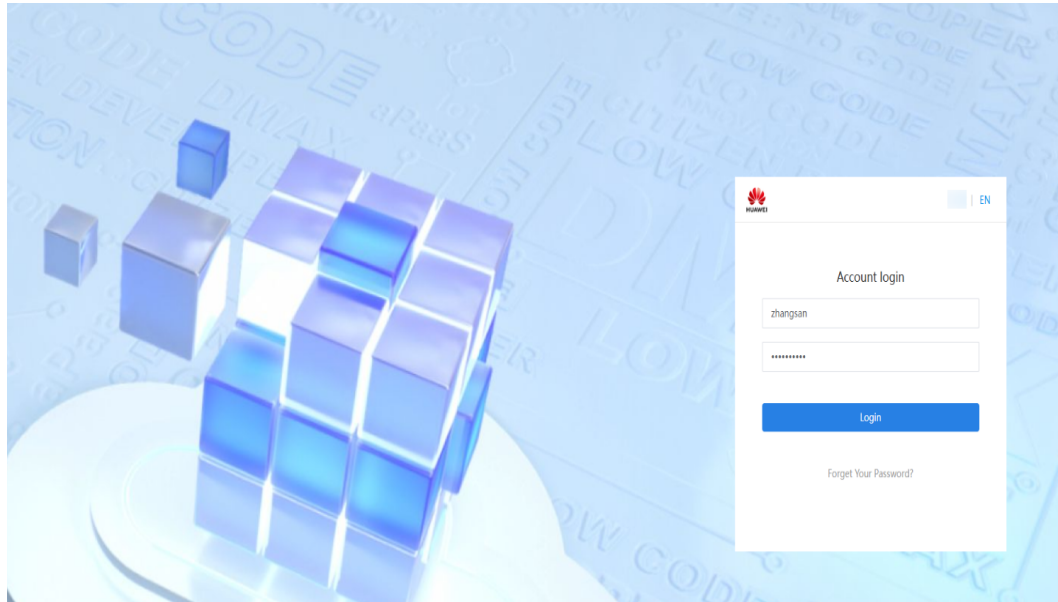


Figure 7-42 Filling in the questionnaire

Corporate name

Please enter

Company type

Sole foreign investment

listed company

Limited by shares

Date of Incorporation

--Select--

Procurement Specialist

Please enter

Assessment status

In assessment

Assessment completed

Supplier level

gold medal

excellent

optimum

Submit

Created by

[Create the same app](#)

Powered by

Astro Zero

-----End

8 Creating Automated Tasks for Intelligent Operations

8.1 Automated Task Overview

What Is an Automated Task?

Automated tasks can update data, send emails, and handle repetitive tasks. For example, if new form data meets certain conditions, automated tasks can trigger actions like adding, updating, or deleting data. This saves time and improves efficiency.

Automated Task Triggering Types

On the platform, automated tasks can be triggered by the following methods:

- Form event: Triggered when form data in an application changes.
 - Triggered when data is created: Triggered when data is added to the form and the data meets the conditions.
 - Triggered when data is created: Triggered when data is added to the form and the data meets the conditions.
 - Triggered when data meets the conditions: Triggered when data is added to or updated in a form and the data meets the conditions.
 - Triggered when data is deleted: Triggered when data is deleted from the form and the data meets the conditions.
- Process events > When approval process triggered: Triggered when the process node operation is complete. For example, the task of updating form data is triggered after the approval is complete.
- Time events > When timer triggered: Triggered periodically according to the preset time.

8.2 Creating an Automated Task

Automated tasks make application management more efficient. They can automatically update data, send emails, and handle repetitive tasks. For example,

if new form data meets certain conditions, automated tasks can trigger actions like adding, updating, or deleting data. This saves time and improves efficiency.

Procedure


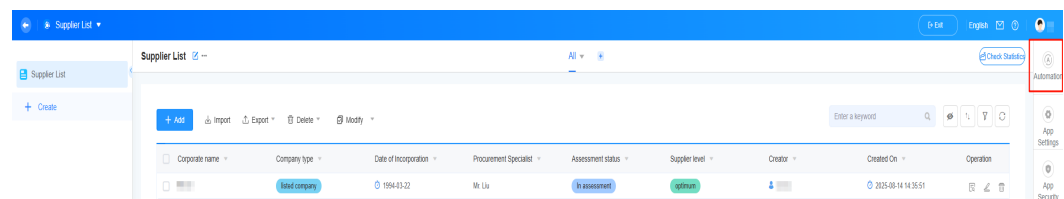
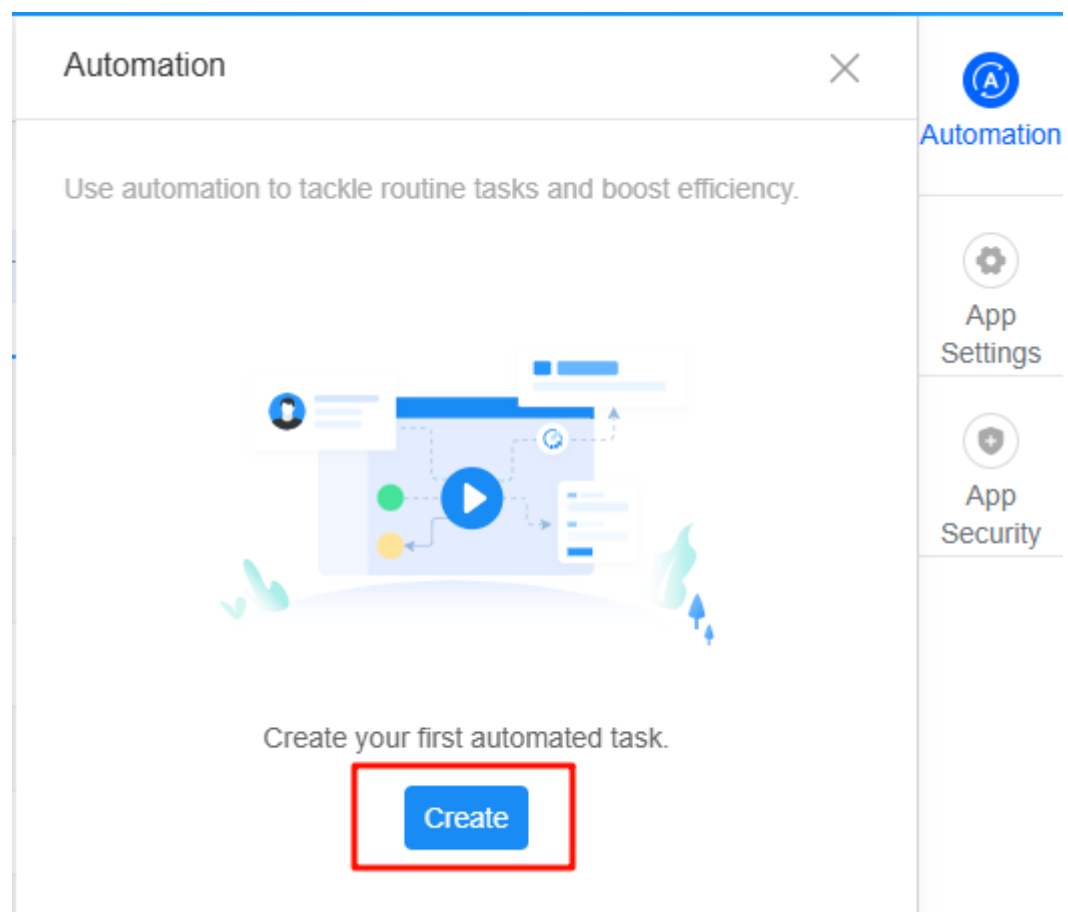
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click  in the upper right corner of the page.

Figure 8-1 Accessing the Automation page



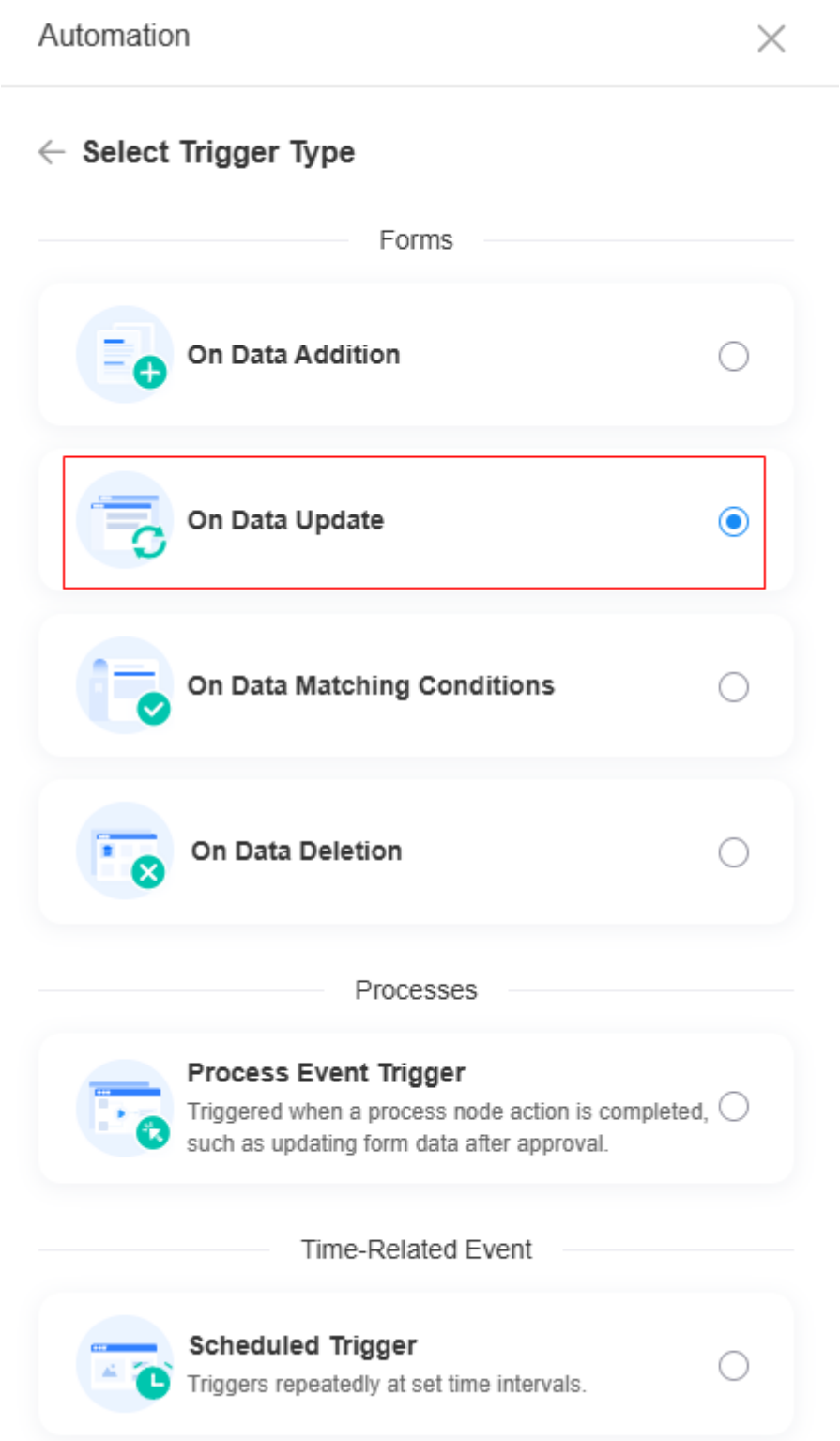
- Step 4** On the **Automation** page, click **Create**.

Figure 8-2 Clicking the create button



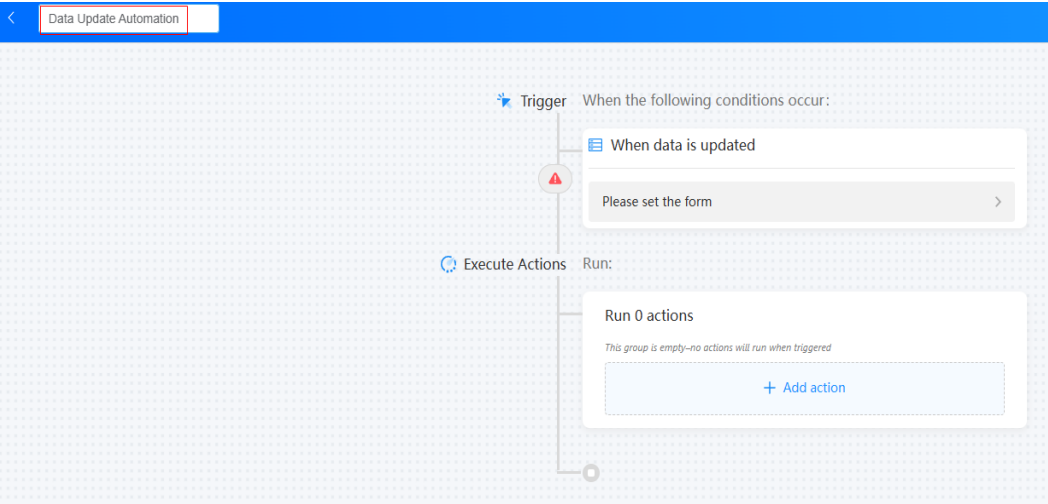
- Step 5** Select a triggering type, for example, **On Data Update**, and click **Confirm**.

Figure 8-3 Selecting a trigger type



Step 6 In the upper left corner of the page, set the automated task name.

Figure 8-4 Setting the automated task name



Step 7 In the **Trigger** area, set trigger conditions and click **Save**.

Figure 8-5 Setting the trigger conditions

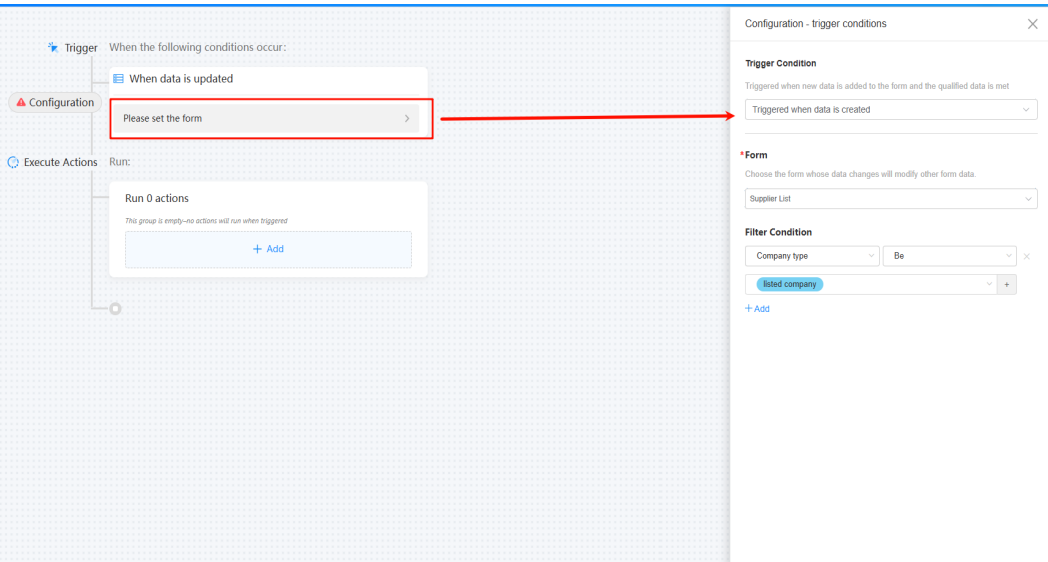


Table 8-1 Parameters for configuring trigger conditions

Parameter	Description
Trigger Condition	<p>Set the conditions for triggering an automated task.</p> <ul style="list-style-type: none">• Triggered when data is created: Triggered when data is added to the form and the data meets the conditions.• Triggered when data is created: Triggered when data is added to the form and the data meets the conditions.• Triggered when data is changed: Triggered when data is added to or updated in the form and the data meets the conditions.• Triggered when data is deleted: Triggered when data is deleted from the form and the data meets the conditions.• When approval process triggered: Triggered when the process node operation is complete. For example, the task of updating form data is triggered after the approval is complete.• When timer triggered: Triggered periodically according to the preset time.
Form	Form for triggering an automated task.
Filter Condition	Filters data that meets the filter condition in the form.

Step 8 Set the execution action and click **Save**.

Set an execution action. The following actions are supported: **Add**, **Update**, **Get Single Record**, **Get Multiple Records**, **Send email**, **Send WeCom Notification**, **Send WeLink Card**, and **Flow**. This step uses adding data as an example to describe how to set the execution action and verify the result.

Figure 8-6 Setting an execution action

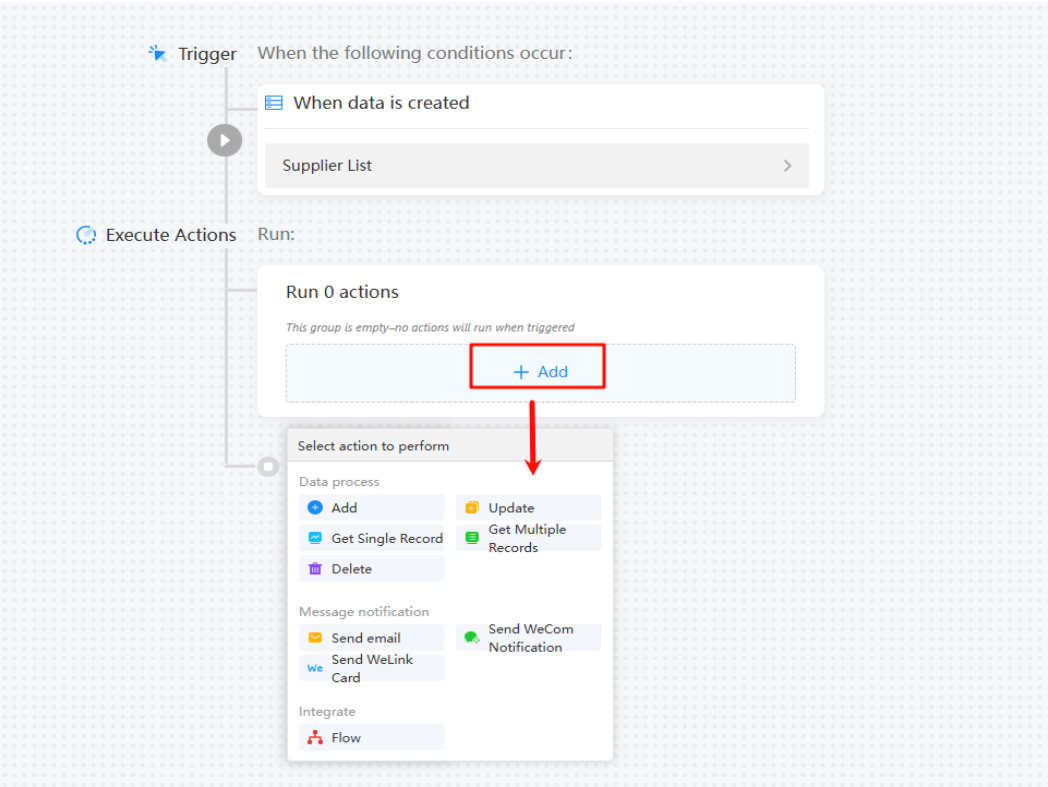


Figure 8-7 Adding data

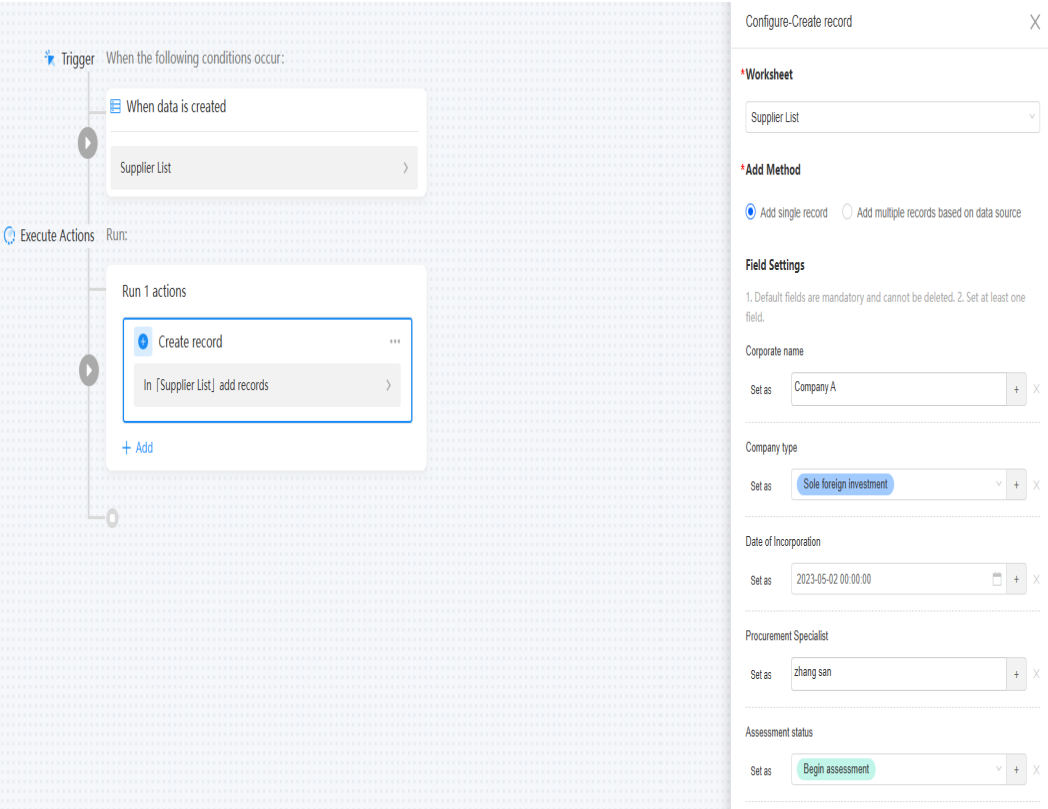


Figure 8-8 Inserting an action

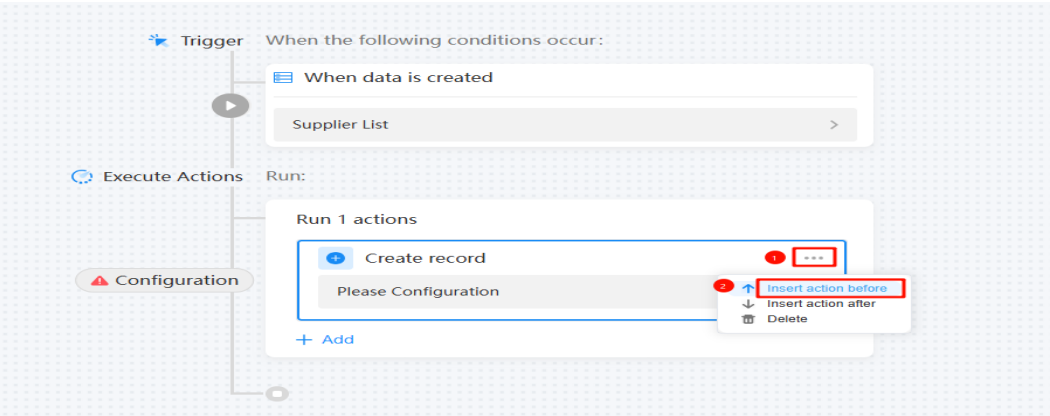


Table 8-2 Parameters for adding data

Parameter	Description
Worksheet	Select the worksheet where data is to be added.
Add Method	When adding data to a worksheet, you can add a single data record or add multiple data records based on the data source.
Select Data Source	Insert the Get Multiple Records action before the current node as the data source, as shown in Figure 8-8 . This parameter needs to be set only when Add Method is set to Add multiple records based on data source .
Field Settings	Set the field value of the new data. At least one field must be set.

Figure 8-9 Updating data

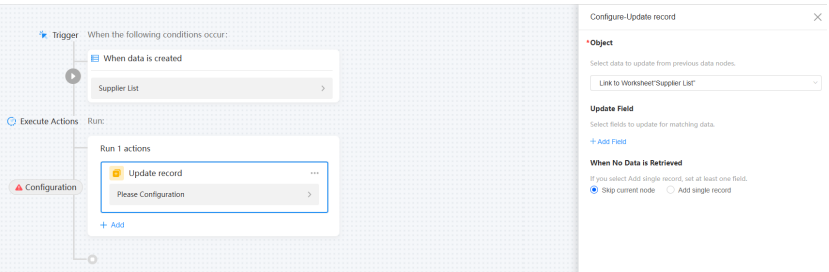


Table 8-3 Parameters for updating data

Parameter	Description
Object	Select the data to be updated from the data nodes before the current node.

Parameter	Description
Update Field	Update the data that meets the conditions by selecting the corresponding fields.
When No Data is Retrieved	If no data is obtained, you can choose to skip the current node or add a data record.

Figure 8-10 Obtaining a single data record

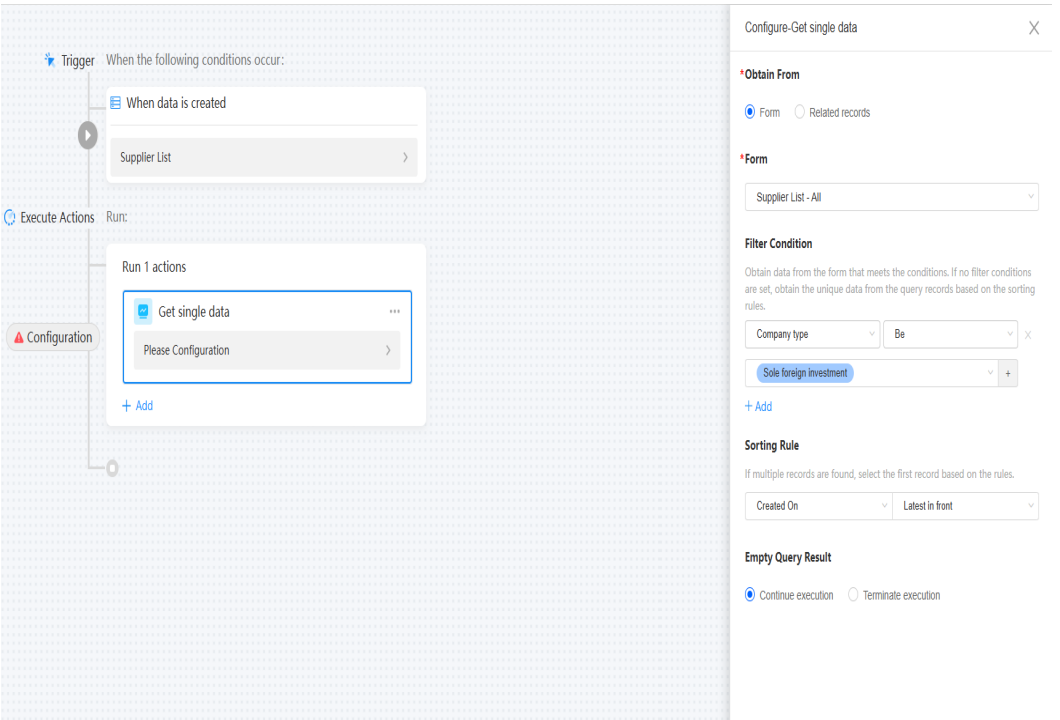


Table 8-4 Parameters for obtaining a single data record

Parameter	Description
Obtain From	Obtain a data record from forms and associated records.
Form	Select the form from which data is obtained. This parameter needs to be set only when Obtain From is set to Form .
Filter Condition	Obtain data that meets the filter conditions from the form. If no filter condition is set, the system selects unique data from the query records based on the sorting rule. This parameter needs to be set only when Obtain From is set to Form .

Parameter	Description
Sorting Rule	If multiple data records are found, the first one is selected based on the sorting rule. This parameter needs to be set only when Obtain From is set to Form .
Empty Query Result	Whether to continue or terminate the execution when the query result is empty. This parameter needs to be set only when Obtain From is set to Form .
Select node object	Select the object from which data is obtained. This parameter needs to be set only when Obtain From is set to Related records .
Select fields for association types	Select a field in the associated record widget in the form. This parameter needs to be set only when Obtain From is set to Related records .

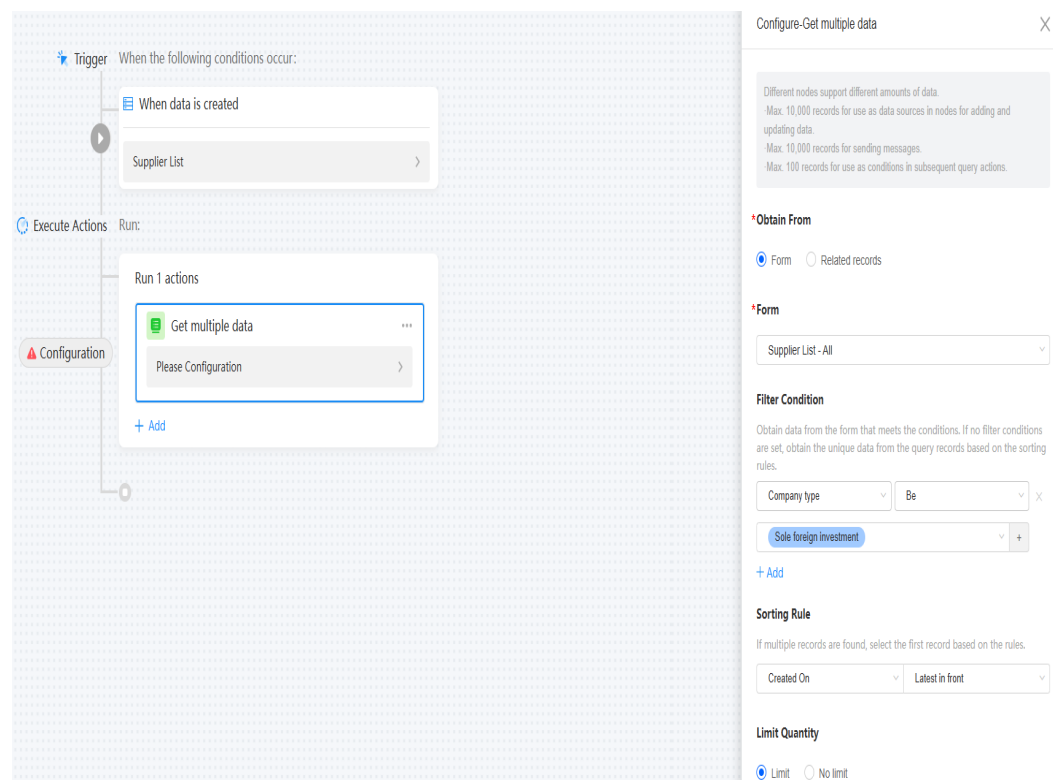
Figure 8-11 Obtaining multiple data records

Table 8-5 Parameters for obtaining multiple data records

Parameter	Description
Obtain From	Obtain a data record from forms and associated records.
Form	Select the form from which data is obtained. This parameter needs to be set only when Obtain From is set to Form .
Filter Condition	Obtain data that meets the filter conditions from the form. If no filter condition is set, the system selects unique data from the query records based on the sorting rule. This parameter needs to be set only when Obtain From is set to Form .
Sorting Rule	If multiple data records are found, the first one is selected based on the sorting rule. This parameter needs to be set only when Obtain From is set to Form .
Limit Quantity	Obtain the first <i>N</i> data records based on the sorting rule.
Empty Query Result	Whether to continue or terminate the execution when the query result is empty. This parameter needs to be set only when Obtain From is set to Form .
Select node object	Select the object from which data is obtained. This parameter needs to be set only when Obtain From is set to Related records .
Select fields for association types	Select a field in the associated record widget in the form. This parameter needs to be set only when Obtain From is set to Related records .

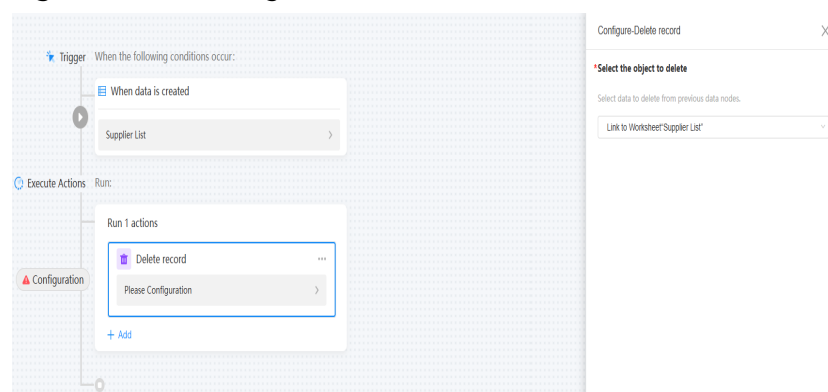
Figure 8-12 Deleting data

Table 8-6 Parameters for deleting data

Parameter	Description
Select the object to delete	Select the data to be deleted from the data nodes before the current node.

Figure 8-13 Sending an email

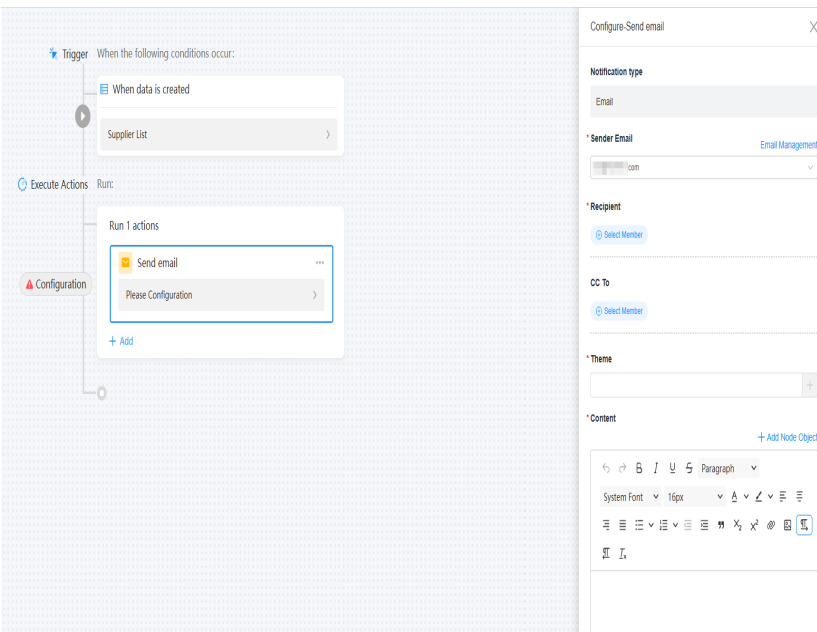



Table 8-7 Parameters for sending an email

Parameter	Description
Notification type	The default value is Email and cannot be changed.
Sender Email	Select the email address of the sender and click Email Management . The system administrator can set and modify the email information. For details, see Setting the Email Address .
Recipient	You can specify an email recipient and set related information. You can specify a person, role, or dynamically obtain the recipient information.
CC To	You can specify CC recipients of the email. You can specify the recipients, roles, or dynamically obtain the recipients.
Theme	Email subject. You can enter a subject or click  to add a subject.

Parameter	Description
Content	Setting the content of the email to be sent Click Add Node Object to copy the fields from the record to the content.
Source	Select a sending source. The name of the application where the automated task is located is displayed in the recipient information for tracing.

Figure 8-14 WeCom notifications

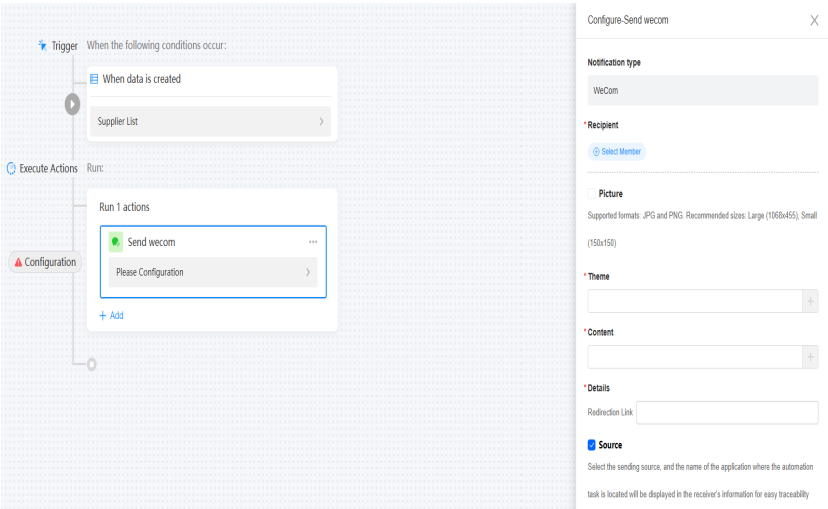




Table 8-8 WeCom notification parameters

Parameter	Description
Notification type	The default value is WeCom and cannot be changed.
Recipient	You can specify WeCom recipients. You can specify a person, role, or dynamically obtain the recipient.
Picture	If this parameter is checked, click the upload image button to send image and text notifications. If this option is not checked, notifications are sent as text card messages. Currently, only JPG and PNG images are supported. Use 1068 x 455 and 150 x 150 sizes for better experience.
Theme	WeChat theme. You can enter a theme or click  to add a theme.
Content	WeChat content to be sent. You can enter the content directly or click  to add the content from the record.
Details	Target link for redirection when you view details.

Parameter	Description
Source	Select a sending source. The name of the application where the automated task is located is displayed in the recipient information for tracing.

Figure 8-15 WeLink card

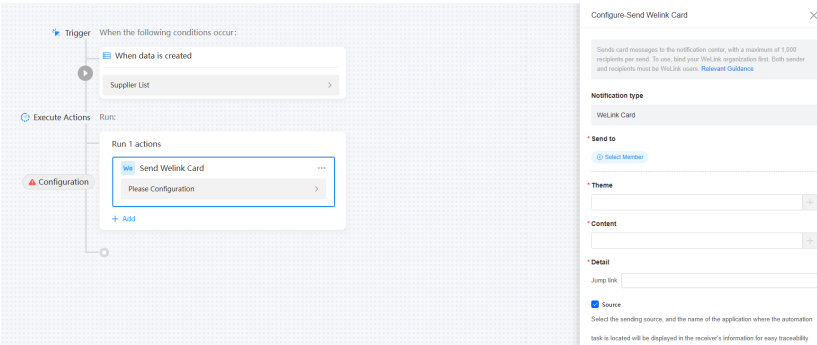


Table 8-9 WeLink card notification parameters



Parameter	Description
Notification type	The default value is WeLink Card and cannot be changed. You can send WeLink card notifications to a maximum of 1,000 users at a time. To use this function, bind WeLink first.
Send to	You can specify WeLink recipients and set related information. You can specify a person, role, or dynamically obtain the recipient information.
Theme	WeLink theme. You can enter a theme or click  to add a theme.
Content	Set the WeLink content to be sent. You can directly enter the content or click  to add the content.
Detail	Target link for redirection when you view details.
Source	Select a sending source. The name of the application where the automated task is located is displayed in the recipient information for tracing.

Figure 8-16 Flow

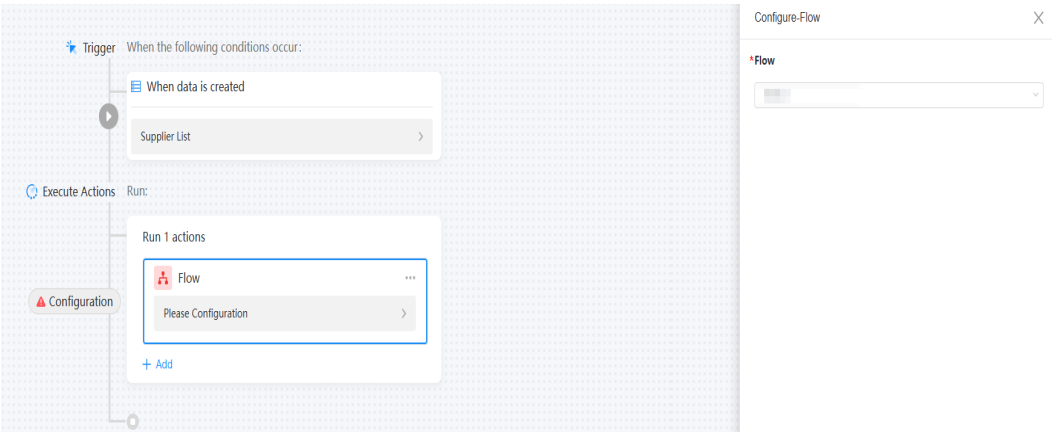


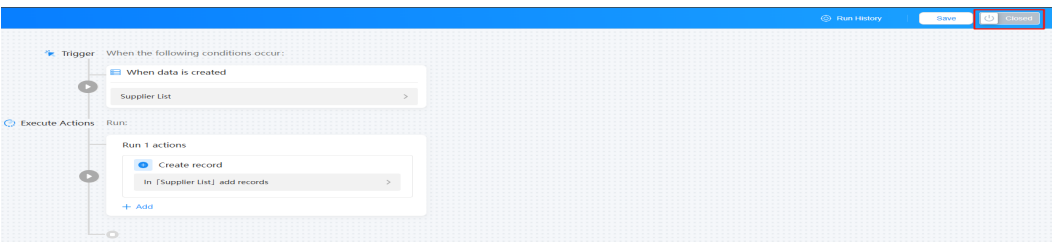
Table 8-10 Flow parameters

Parameter	Description
Flow	Before selecting a flow, ensure that you have created a flow. For details, see Flows .
Field Settings	Click Add Field and set the initial values of the input parameters of the flow for execution.

Step 9 Click **Save** in the upper right corner of the page.

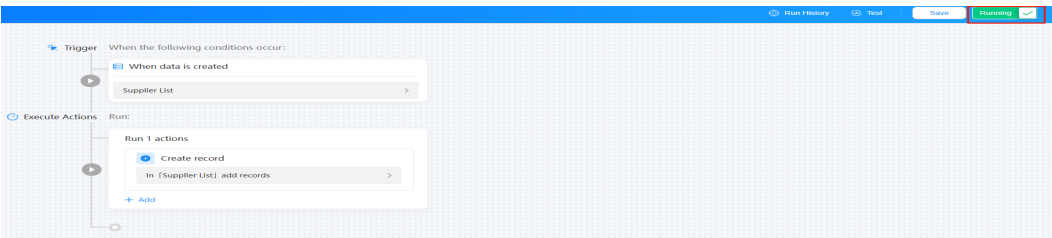
Step 10 After the saving is successful, click **Closed** in the upper right corner of the page to enable the automated task.

Figure 8-17 Clicking Closed



After the task is enabled, the task status changes to **Running**, as shown in [Figure 8-18](#).

Figure 8-18 Viewing the enabled automated task



Step 11 Check if the automated task runs as expected.

1. After the automated task is enabled, click the test button. The test page is displayed.

Figure 8-19 Accessing the test page

Test ×

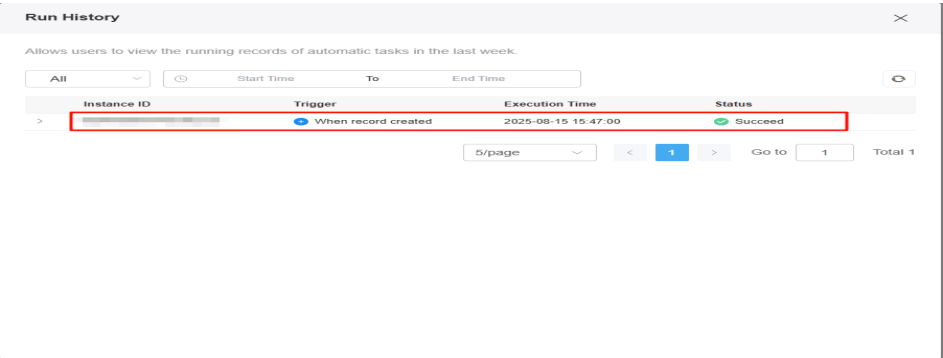
The test will be run as a real-time automation task, and any data changes or message notifications cannot be undone.

From select a record

- Micron ☒
- WUS Printed Circuit ☐
- Fujitsu ☐
- ZHONGLI GROUP ☐

2. Select a record and click the button to start the test.
This test will run as a real-time automated task. Configuration data changes and message notifications will be executed and cannot be undone.
3. Check if the data is added.
 - Method 1: On the automated task page, click **Run History** to check the test result of the automated task.

Figure 8-20 Checking the test result



- Method 2: Click to return to the application editing page. Click the form selected in Figure 8-7. You can see that a data record has been added to the form.

Figure 8-21 Returning to the application editing page

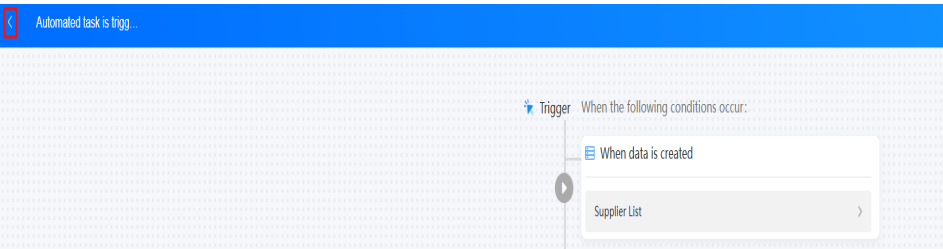


Figure 8-22 An added data record



----End

8.3 Managing Automated Tasks

Enabling an Automated Task

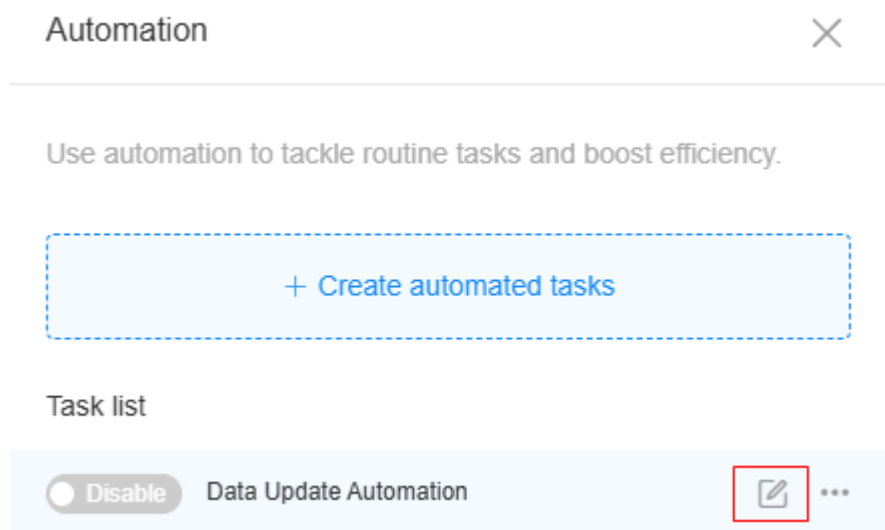
If an automated task is not enabled, you can enable it by performing the following operations. The automated task will be triggered only when the preset conditions are met.

- Step 1**
- Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2**
- In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 Click  in the upper right corner of the page.

Step 4 In the automated task list, click  next to a disabled automated task.

Figure 8-23 Editing an automated task



Step 5 On the design page, click **Closed** in the upper right corner to enable the automated task.

If the status of **Closed** changes to **Running**, the automated task is enabled.

Figure 8-24 Clicking Closed

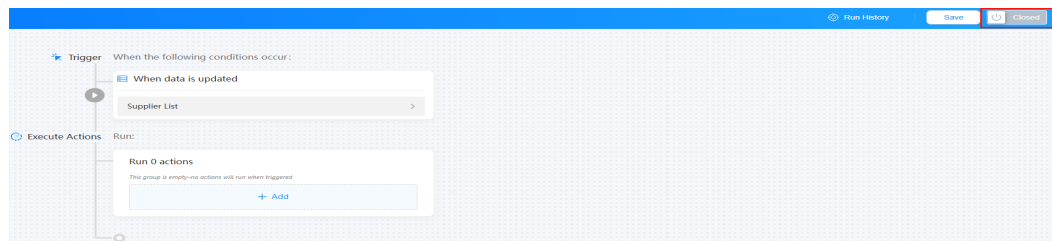
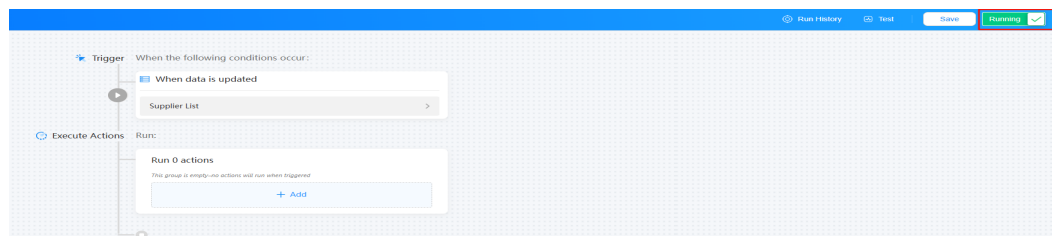


Figure 8-25 Automated task enabled



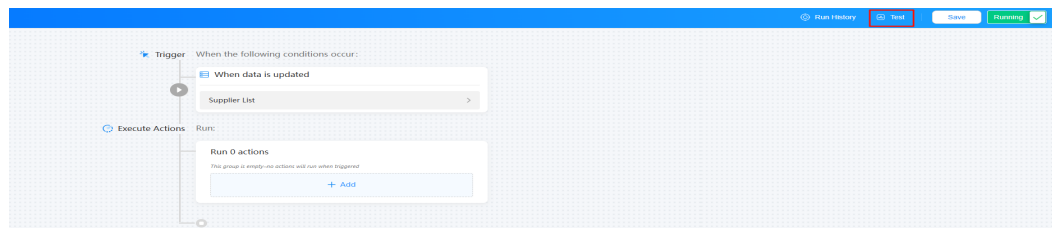
----End

Testing an Automated Task

After enabling an automated task, a test button appears. Click it to check if the task executes correctly when the trigger condition is met.

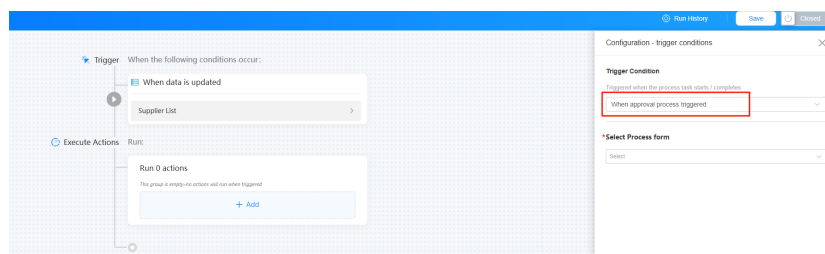
Step 1 After an automated task is enabled, the **Test** button is displayed.

Figure 8-26 Testing an automated task



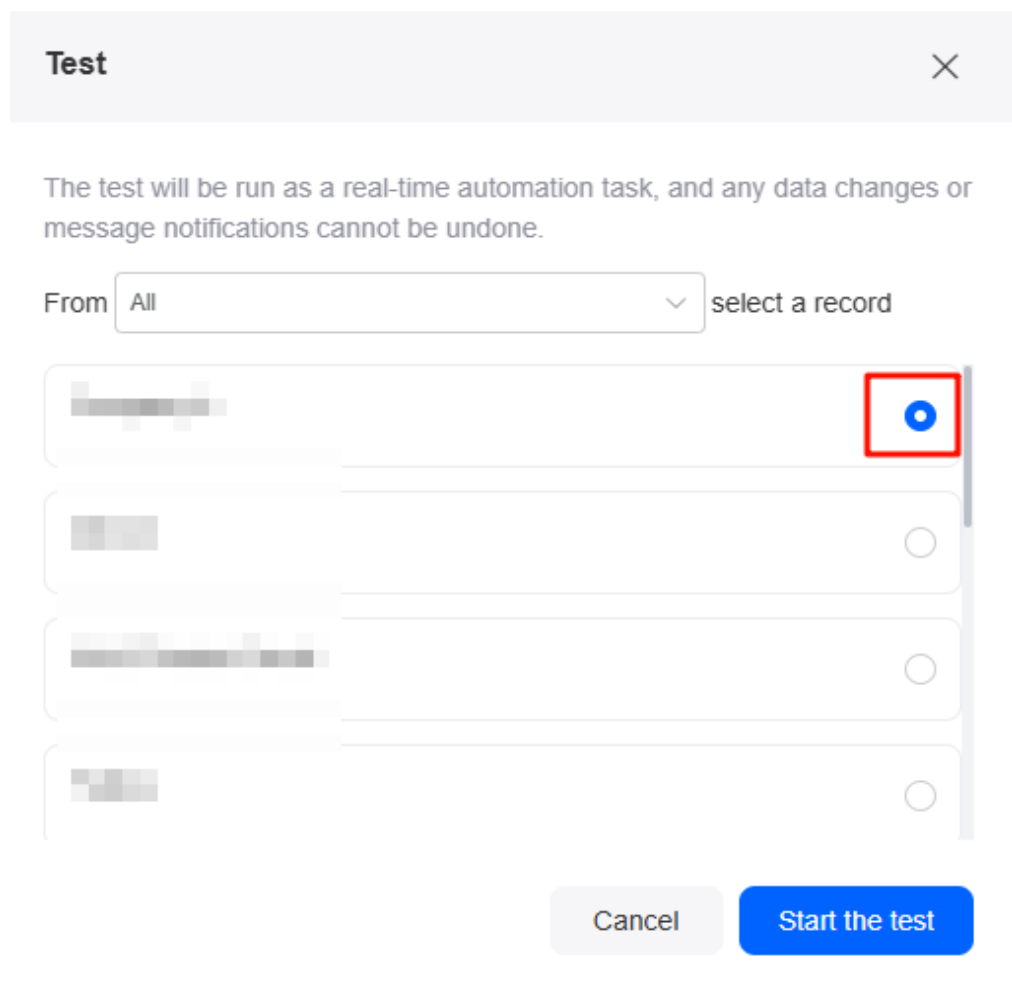
When the trigger condition is triggered by a process event (as shown in [Figure 8-27](#)), the test function is not supported. That is, the test button is not available.

Figure 8-27 Process event triggering



Step 2 On the page that is displayed, select a record and click the start button.

Figure 8-28 Selecting a record



If the trigger condition is scheduled (as shown in [Figure 8-29](#)), you can perform the test immediately without selecting a record (as shown in [Figure 8-30](#)).

Figure 8-29 Scheduled

Configuration - trigger conditions

Trigger condition

Cycle triggering according to the set time period

When timer triggered

* Trigger Rule

Daily

* Trigger Time

🕒 17:21

End Schedule Date

📅 2025-03-05

🕒 17:21

Figure 8-30 Testing the function of triggering automated tasks as scheduled

Test

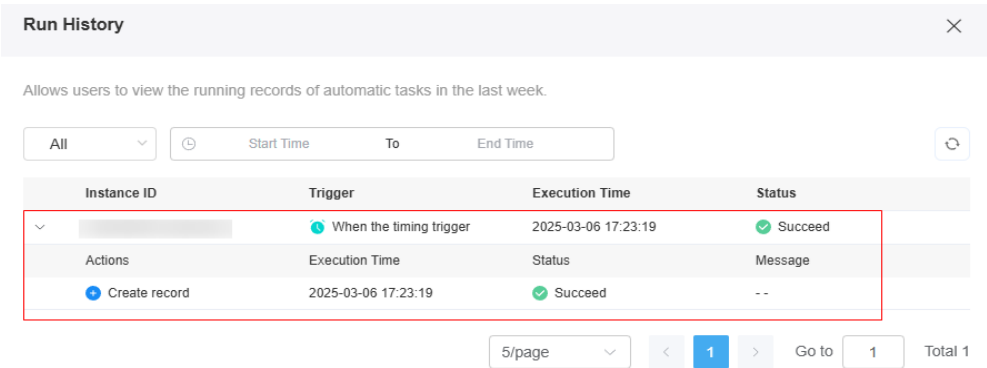
The test will be run as a real-time automation task, and any data changes or message notifications cannot be undone.

The current trigger is Scheduled triggering. An automation task will be triggered immediately at the current time.

Start the test

Step 3 After the execution is successful, click **Run History** to view the test and running results of the automated task.

Figure 8-31 Checking the results



----End

Stopping an Automated Task

Stop the automated task if it's no longer needed, if there's an exception, or if the service requirements change.



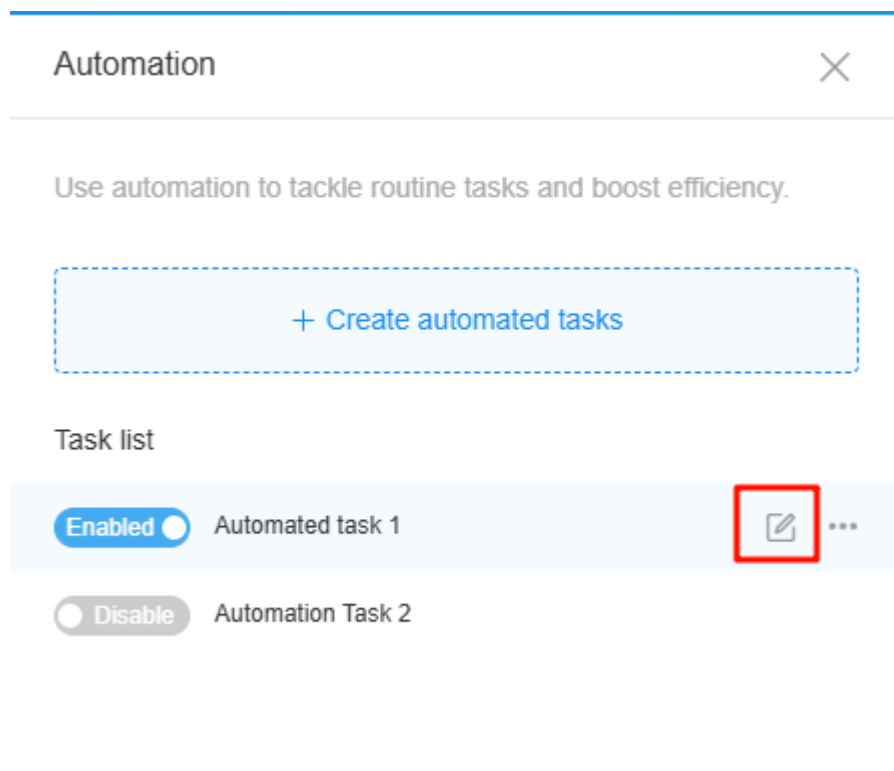
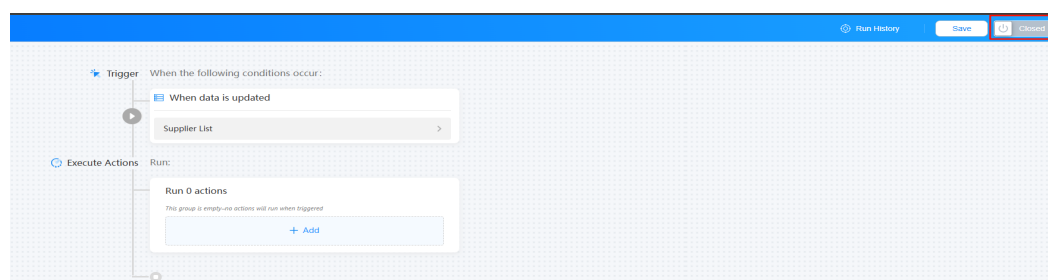
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click  in the upper right corner of the page.
- Step 4** In the automated task list, click  next to an enabled automated task.

Figure 8-32 Editing an automated task

Step 5 On the design page, click **Running** in the upper right corner to stop the automated task.

If the status of **Running** changes to **Closed**, the automated task is stopped.

Figure 8-33 Enabling an automated task


-----End

Deleting an Automated Task

Before deleting an automated task, you need to stop the automated task.

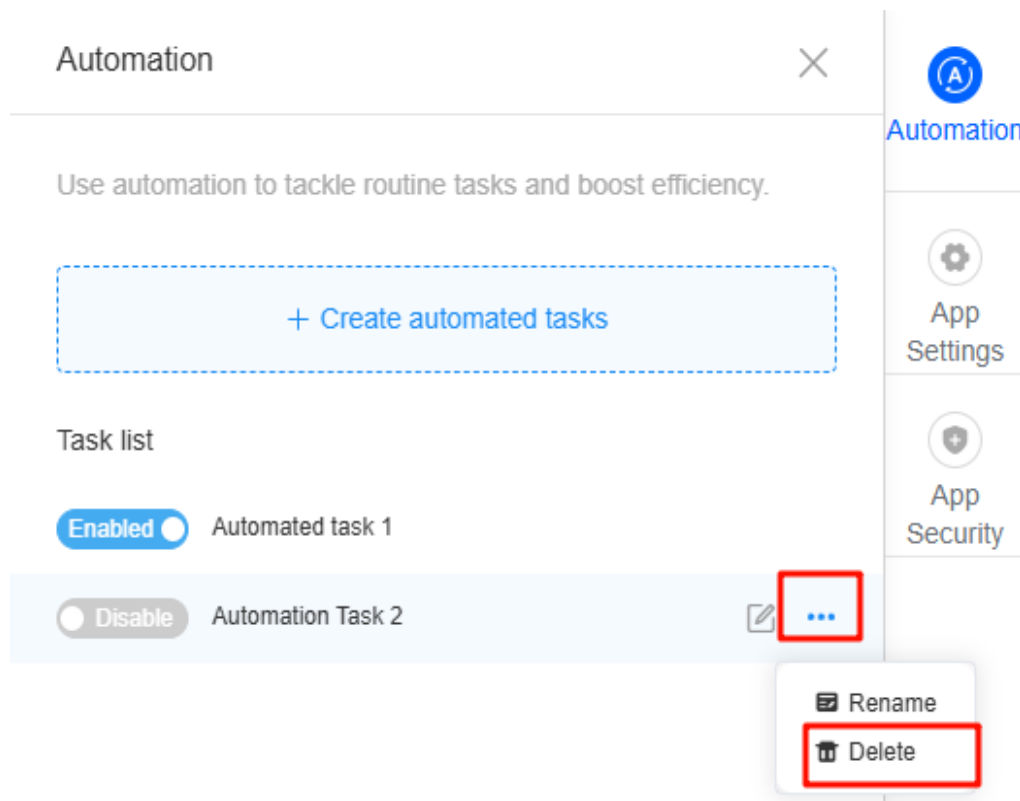
Step 1 Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).

Step 2 In **All Apps**, hover over the target application's ... and choose **Edit**.

Step 3 Click  in the upper right corner of the page.

- Step 4** In the automated task list, click **...** next to a stopped automated task and click the delete button.

Figure 8-34 Deleting an automated task



- Step 5** In the displayed dialog box, confirm the deletion.

Deleted tasks cannot be recovered. Exercise caution when performing this operation.

----End

Checking Run Logs of Automated Tasks

After enabling an automated task, you can view the task's execution results to quickly resolve issues. Note that only records from the last week are available for viewing.



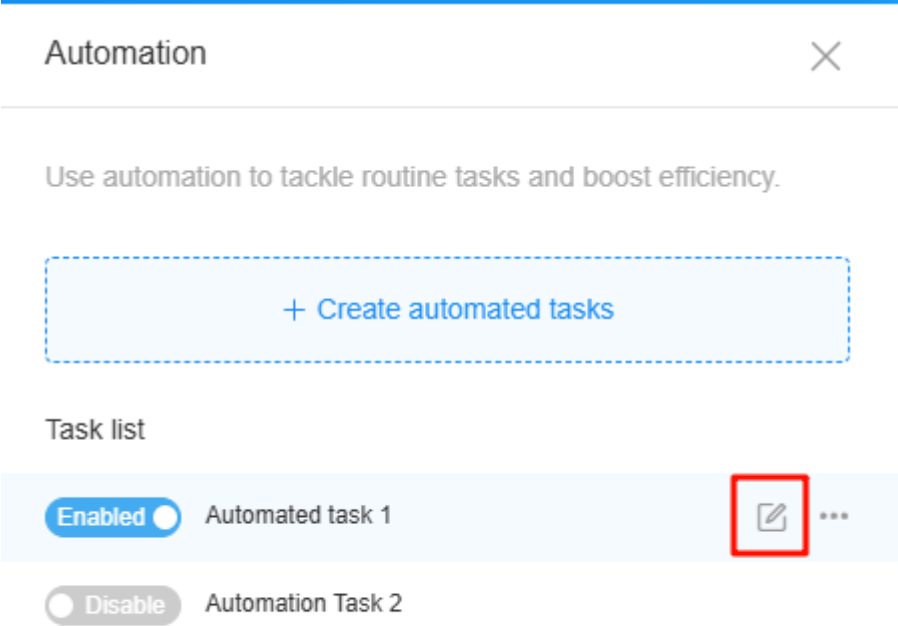
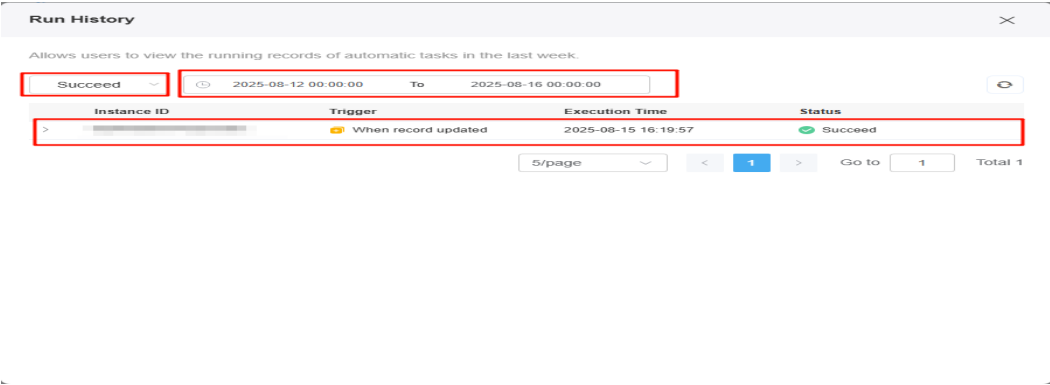
- Step 1** Log in to the no-code workbench by referring to [Logging In to the No-Code Workbench](#).
- Step 2** In **All Apps**, hover over the target application's ... and choose **Edit**.
- Step 3** Click  in the upper right corner of the page.
- Step 4** In the automated task list, click  next to the target task. The automated task editing page is displayed.

Figure 8-35 Clicking the edit button



- Step 5** Click **Run History** in the upper right corner of the page. The log tracing page is displayed.
- Step 6** Check the execution records of the automated task from the past week.

Figure 8-36 Checking the execution records



----End