

Micro2Media Project Management & Form Builder System — User Guide

This comprehensive guide details the operations and specifications of the **YFORM** ecosystem. The system is designed to integrate data collection with agile execution, ensuring that every form submission becomes a trackable, manageable task.

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1. Introduction

The **Micro2Media Project Management & Form Builder System** is a high-performance application combining task/project tracking with a professional drag-and-drop form builder. It organizes tasks, tracks progress via agile methodologies and creates custom forms for data collection that automatically generate tasks upon submission.

Key Features

Task Management:

- **Task Management:** Create and manage tasks with multiple types (Project, Requirement, Bug, Client Support).
- **Kanban Board:** Visual drag-and-drop status management.
- **Task Relationships:** Link requirements to bugs and track dependencies.
- **Version/Release Management:** Organize tasks by releases and track version status.
- **Dashboard Analytics:** Visual statistics and insights.
- **Multi-Organization Support:** Data isolation for multiple organizations.

- **Role-Based Access:** Specialized permissions for Admin, Organization, and Member roles.

Form Builder:

- **Drag-and-Drop Interface:** Visual creation of custom forms.
 - **Multiple Field Types:** Extensive field options including eSignatures and Chronometers.
 - **Conditional Logic:** Advanced show/hide and update rules (no limitation).
 - **Form Preview:** Live testing before publishing.
 - **Embed Code:** I frame integration for external websites.
 - **Draft Entries:** LocalStorage support for offline saving and later submission.
 - **Automatic Task Creation:** Direct conversion of form data into agile tasks.
 - **Form Entries Management:** Centralized management of all submissions.
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2. Getting Started

Registration

1. Navigate to the login page and click "**Sign Up**".
2. Fill in **Full Name**, **Email**, and **Password** (min. 6 characters).
3. Select **Account Type**:
 - **Organization:** For owners/managers.
 - **Member:** For team members (must select an existing organization from the dropdown).

Login

1. Enter your **email** or **username** (e.g., "john" or "john@micro2media.com").
 2. Enter your **password**.
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3. User Roles and Permissions

Admin

- **Access:** Full system access to all organizations and data.
- **Capabilities:** Manage all tasks, forms, versions, and users across the entire system. No data restrictions.

Organization

- **Access:** Own organization's data only.
- **Capabilities:** Create/manage tasks, forms, and versions. View statistics and management members. Can delete tasks and forms.

Member

- **Access:** Organization's data.
 - **Capabilities:** Create/manage tasks and forms. View statistics. View entries and drafts. **Cannot** delete items or manage users/versions.
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4. Dashboard Overview

The Dashboard is the central hub for project insights.

Main Sections

1. **Task Distribution Chart:** Doughnut chart showing tasks by status (NEW, ONGOING, DONE).
 2. **Requirements Distribution Chart:** Doughnut chart showing requirements by substatus (UNDER ANALYSIS, APPROVED, UNDER DEVELOPMENT, UNDER TESTING).
 3. **Overdue Tasks Widget:** Tasks past their due date, sorted by Priority (Critical → Low). Includes pagination and scroll buttons.
 4. **Statistics Cards:** Real-time counts for Total, New, Ongoing, and Done tasks.
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5. Task Management

Creating a Task

1. Click "**Create New Task**".
2. **Main Fields:** Title (required) and Description.
3. **Properties (Right Sidebar):**
 - **Priority:** Low, Medium, High, Critical.
 - **Task Type:** Project, Requirement, Bug, or Client Support.
 - **Status:** NEW, ONGOING, DONE.
 - **Substatus:** Specific to Requirements in ONGOING status.
 - **Labels:** Comma-separated tags.
 - **Release:** Assignment to unreleased versions.
 - **Due Date:** Set the deadline.

Editing a Task

Click any task from Kanban or List view to modify fields, add **Comments**, upload **Attachments** (max 5 files, 10MB each), or view relationships.

6. Task Relationships

Accessing Relationships

Navigate to "**Task Relationships**" in the sidebar or from a Requirement's detail page.

Linking Logic

- **Requirements (Left Panel):** View ID, Title, Status, and linked Bug count.
 - **Bugs (Right Panel):** View status and parent requirement.
 - **The Workflow Rule:** One requirement can have multiple bugs. A requirement **cannot** be set to DONE if any linked bug is not DONE.
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7. Version/Release Management

Creating and Managing

1. **Create Version:** Define Name (e.g., v1.0.0), Description, and Release Date.
 2. **Assign Tasks:** Use the detail page to drag-and-drop tasks from "Available" to the "Version" list.
 3. **Release:** Click "Release Version". This locks assignments; tasks cannot be added or removed from released versions.
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8. Form Builder Specifications

Field Palette (Available Types)

- **Basic:** Text, Textarea, Email (validated), Password, Number, URL.
- **Selection:** Select, Checkbox, Radio, Country.
- **Date/Time:** Date, DateTime, Time.
- **Special:** File Upload, Color Picker, Range Slider, Dual Range Slider, **Signature Pad**, **Chrono (Timer)**, HTML, Submit Button.
- **Layout: Page** (multi-page navigation), **Containers** (2, 3, and 4-column blocks).

Structural Rules

- **Pages:** Cannot contain other pages.
- **Containers:** Cannot contain other containers or pages.
- **Container Limits:** Maximum fields allowed equals the column count (e.g., 2-column = 2 fields).

Form Settings

- **Form Task Type:** (Required) Determines the type of task (Project, Bug, etc.) created automatically upon submission. The task description includes all field values.
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9. Conditional Logic & Calculations

Rule Configuration

1. Click "**Conditional Logic**" in Edit Mode.
2. **Conditions:** Set "When field" (including Page Status: TODO, ONGOING, DONE) + Operator (Equal, Greater than, Contains, Length, etc.) + Value.
3. **Logic:** Supports AND/OR for up to 5 conditions per rule.
4. **Action:** **Show**, **Hide**, or **Update**.

Advanced Update Actions

- Supports mathematical calculations in the update value.
 - Syntax: Use %fieldname% (e.g., %Quantity% * %Price%).
 - Operators: +, -, *, /.
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10. Publishing and Drafts

Confirmation & Embed

- **Confirmation:** Custom HTML content or **Redirect URL**.
- **Embed:** Iframe code for external site integration.

Draft Entries

- **Offline Support:** "Save as Draft" stores data in the browser's **LocalStorage**.
- **Resume:** Access "Draft Entries" from the sidebar to edit and submit later.

Form Entries

- View a table of all submissions under the form builder.
 - **Export CSV:** Download all entry data for spreadsheet use.
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11. Troubleshooting

Issue	Potential Solution
Form Saving Error	Verify Form Title and Task Type are set. Check PHP logs.
Drafts Not Appearing	Ensure you are on the same browser/device. Check LocalStorage.
Logic Not Working	Verify field name mapping. Check browser console (F12) for JS errors.
No Task Created	Ensure "Form Task Type" was selected and the form was saved.
Embed Not Loading	Verify Iframe URL and check for CORS or domain restrictions.

12. System Requirements

- **Browser:** Modern Chrome, Firefox, Edge, or Safari.
- **Requirements:** JavaScript enabled; LocalStorage required for Drafts.
- **Keyboard:** **Esc** (Close modals), **Enter** (Submit focus), **Tab** (Navigate).

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