WorldAPP

ADMINISTRATION MANUAL

WEB: www.worldapp.com • www.keysurvey.com • www.form.com E-MAIL: info@worldapp.com

USA: 781-849-8118
UK: +44(0) 1252 551 600
France: +33 (0)1 78 90 05 45
Australia: 1(800)-554-985
International: +44(0) 2030 020 722
Fax: 781-849-8133

WorldAPP

CONTACTS

Should you have any questions or technical inquiries, please do not hesitate to call, e-mail, write, or fax us.

For Support Contact:

US (781) 849-8118

US (888) 708-8118

Email: support@worldapp.com

For Sales Contact:

US (781) 849-8118

US (888) 708-8118

Email: sales@worldapp.com

Corporate Address:

161 Forbes Road

Braintree,

MA 02184

Web Site:

http://www.worldapp.com/

http://www.keysurvey.com/

http://form.com/

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Table of Contents

I – INTRODUCTION

Form.com and Key Survey **Enterprise Solutions** software is built for business, interfaced for the user and engineered for IT; it delivers a powerful, easy-to-deploy system for data gathering, evaluation and presentation that enables users, workgroups and even remote divisions to create accounts and collaborate on projects in a user-friendly, controlled and secure environment.

Our platform features a user-friendly interface to serve the needs of everyone in your company. There's no software to install or download – all you need is access to a browser.

You have total control over application accounts. You can manage account rights and other settings.

Form.com/Key Survey software is built to scale. It can handle any number of users. Any volume of emails. Any quantity of surveys. Use it to make any kind of form, application, or online test for training or assessment purposes. It's designed to meet your survey demands today, and grow with your company.

Form.com or Key Survey may be hosted on our secure servers or yours as an **Enterprise Solution,** or delivered fully configured and pre-loaded on a standalone server. Data is completely safe whether stored on your server or ours. The platform offers the option of using secure SSL encryption. Administrative controls allow you to define and restrict employee access rights. The master administrator can create unlimited sub accounts and define access levels for all users.

How this Manual is Organized
The manual consists of 2 sections (in addition to the Introduction).

Section II – API Features

• This section provides you with information for accessing the survey system API (Application Program Interface). The API provides programmatic access to the survey system and allows you to perform the following functions:

- *Import responses into your survey*
- *Distribute email messages with replacement tags in the email body*
- *Receive respondent results*

Section III – User Administration

• This section provides you with the tools you need to search for and edit user accounts and other account information. You will also know how to setup LDAP.

II - API FEATURES

Form.com/Key Survey API (application programming interface) service lets developers design computer programs that interact directly with the platform. With these applications, customers and third-parties can more efficiently manage their accounts.

Our platform provides multiple API versions, which are the API v6.9, v7.3 and v8.1. It is strongly recommended to use the most recent version available for your enterprise edition.

The API documentation provides the information necessary to access the form/survey system API. To connect the custom code with Form.com/Key Survey your program developer will need to get the account login credentials and use them in the API connection call. They are the same that survey administrator uses when needs to access the account via regular user interface. If you need to set up an API call with a survey from a Multi-Access account, you must use master account's login details.

The API provides programmatic access to the survey system and allows you to perform the following functions:

- *Creating and managing users.*
- *Designing and distributing surveys to respondents.*
- *Receiving respondent results.*
- *Developing additional tools and applications to help you manage accounts.*

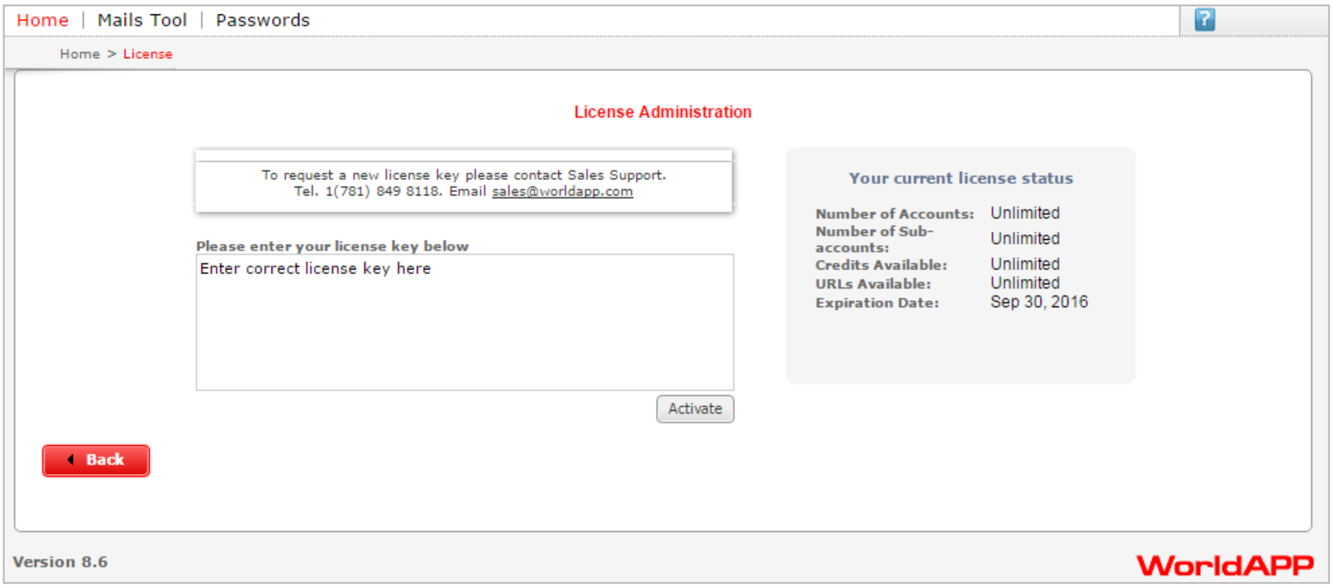
There are more details about Web Services, code examples and API versions in the online help of your application. Just click the HELP link in the top right hand corner of your account. Or please consult the detailed documentation for the API system on WorldAPP website.

III – USER ADMINISTRATION

License Administration

To activate your enterprise application, the license key must be entered on the License page. This is unique key that goes along with other installation materials or can be requested from the WorldAPP Sales team.

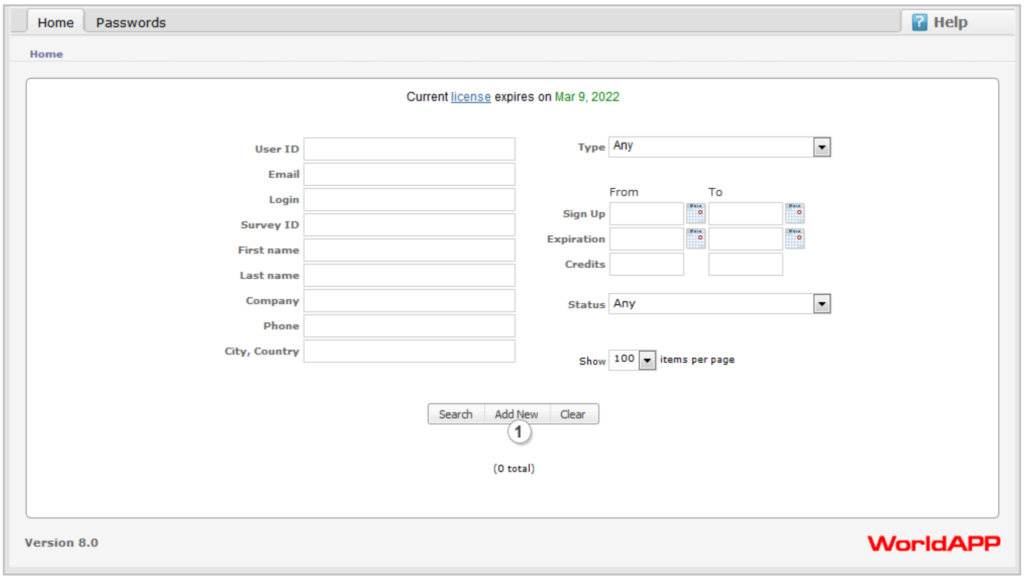
When you log in the application for the first time you are automatically redirected to this page. You can also access it by clicking the license link at the very top of the administration account.



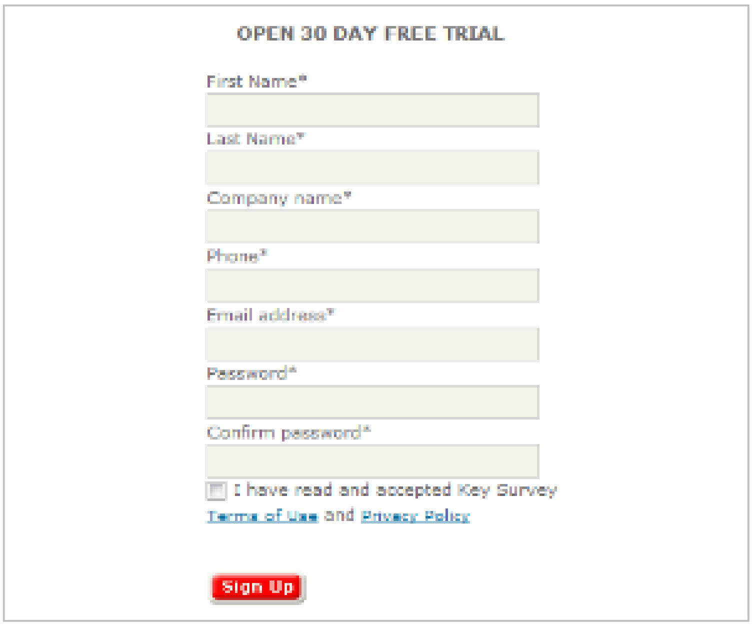
Enter your license key and click the Activate button. If your license key is correct, you will be prompted and license status in the right part of the page will be updated.

Add New Account

New user accounts can be added directly from your administration account.



1. Click the Add New button.
2. Enter account details in the pop-up window. You can also provide other person with the link to this page, so account can be created from the other side by users themselves.



3. When this is done free trial account is created. Go back to your administration account and search for this newly created user. Perform any changes to it if necessary. For more details see the User Account Administration sub-section of this manual.

Note: Sub-accounts for Multi-User and Multi-Access accounts should be created within these accounts by account holders themselves.

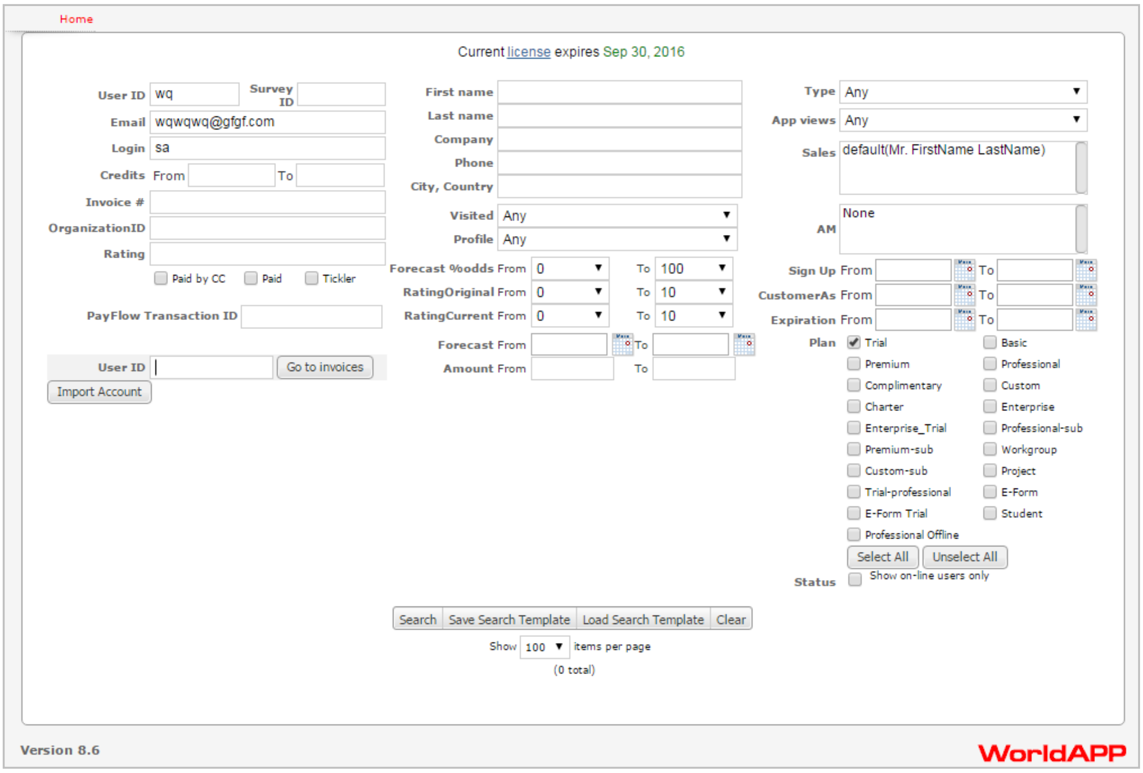
User Account Administration

User account administration should be performed from the administration account of your application. Admin account login details go along with other installation materials and can be get from the account coordinator or from the production group of your company who performed application installation.

Administration account allows you to search for and edit regular user accounts, change their type, expiration date, add or withdraw credits. Editable fields and their descriptions are shown in the Editable Fields table of this manual.

Searching for User Accounts

1. Access the User Search Screen by logging into administration account:

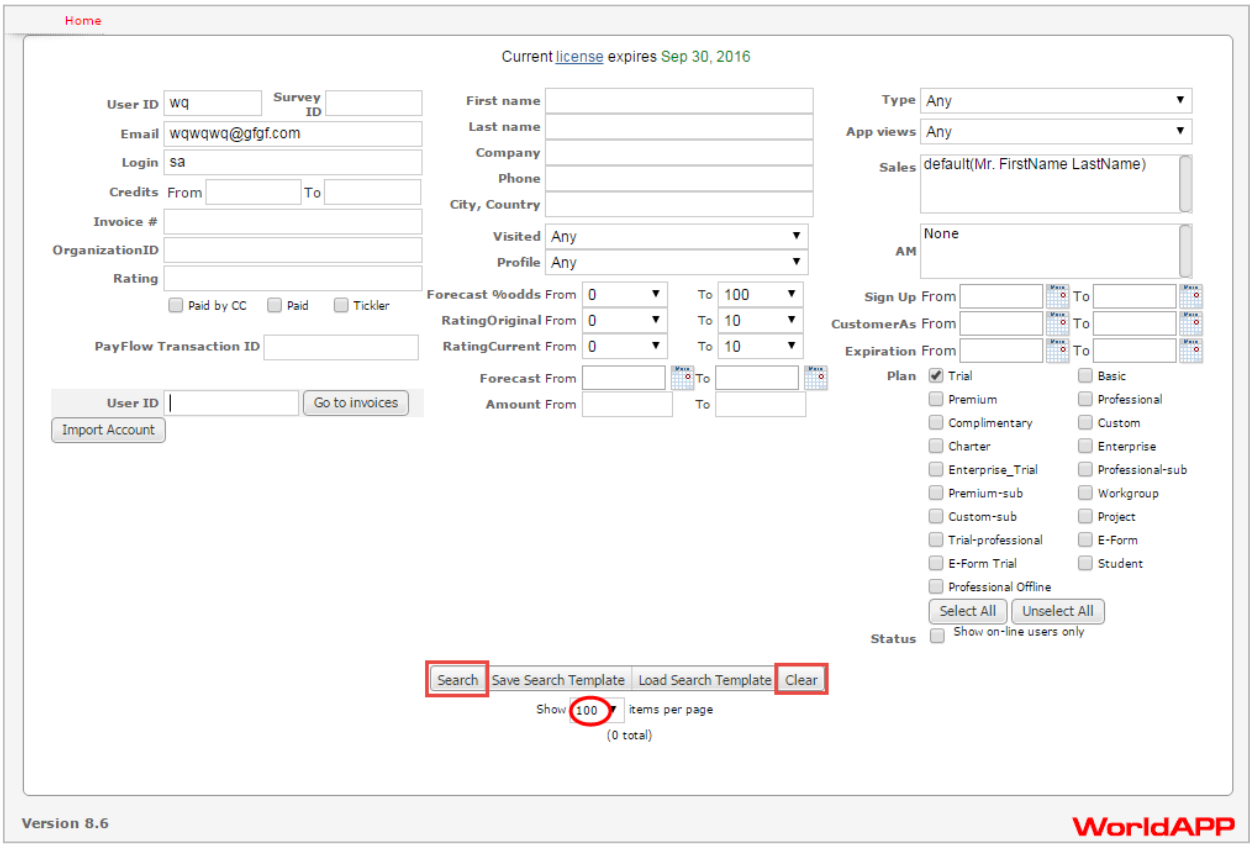


2. All the User Property Fields are searchable. Enter user data into any field to locate the user you want to edit. See the table below for descriptions of each user property field.

Properties	Description
User ID	The unique number of the user in the system.
Email	The email address of the user.
Login	The user login name.
Form/Survey ID	The unique number of the user form/survey
First name	The user first name
Last name	The user last name specified in the account.
Company	The company name specified in the user account.
Phone	The phone number specified in the user account.
City, country	The residence information
Type	The dropdown box allows you to select the user type: - Any; - Single User; - MultiUser Admin; - WebPoll; - Plan Template - Multi-Access; - SubUser.
Sign Up	The 'Sign Up' field. The sampling includes those accounts with the Sign Up dates limited to the range specified in the 'From' and 'To' fields
Expiration	The 'Expiration' field. The sampling includes those accounts with the Expiration dates limited to the range specified in the 'From' and 'To' fields.
Credits	The quantity of the remaining user credits. The sampling includes accounts with credits more or equal to the number specified in the 'From' field and less or equal to the number specified in the 'To' field.
Status	The dropdown box allows you to filter accounts by the following status: Any, Active, Locked.

Use the Show items per page dropdown box to indicate the number of returned records per page in the search results.

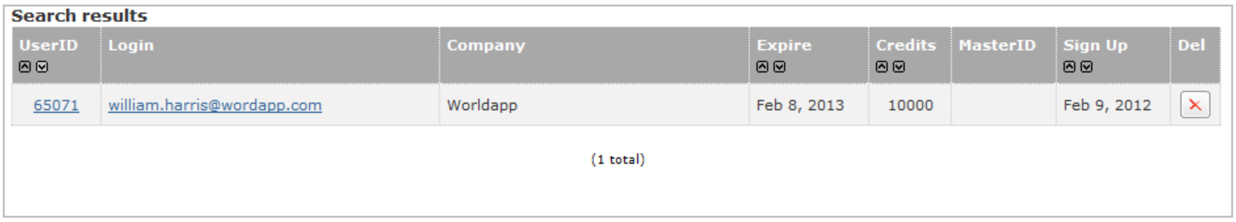
1. Click Search to begin the user search.



2. Click Clear to clear the data out of all fields.

3. Search results are returned and display the associated properties for all users that match the search criteria.

4. If the user account is a sub-account, the unique ID number of the master account displays in the Master ID column. This number is hyperlinked and clicking it allows you to enter the application through the master account login.



Search results

UserID	Login	Company	Expire	Credits	MasterID	Sign Up	Del
65071	william.harris@wordapp.com	Worldapp	Feb 8, 2013	10000		Feb 9, 2012	

(1 total)

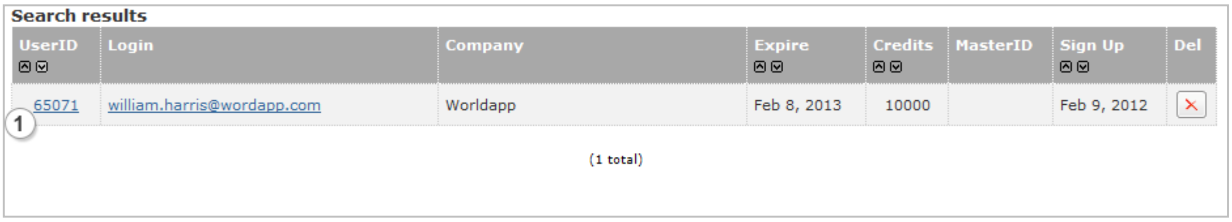
Important Tips

Keep the following things in mind when entering search criteria:

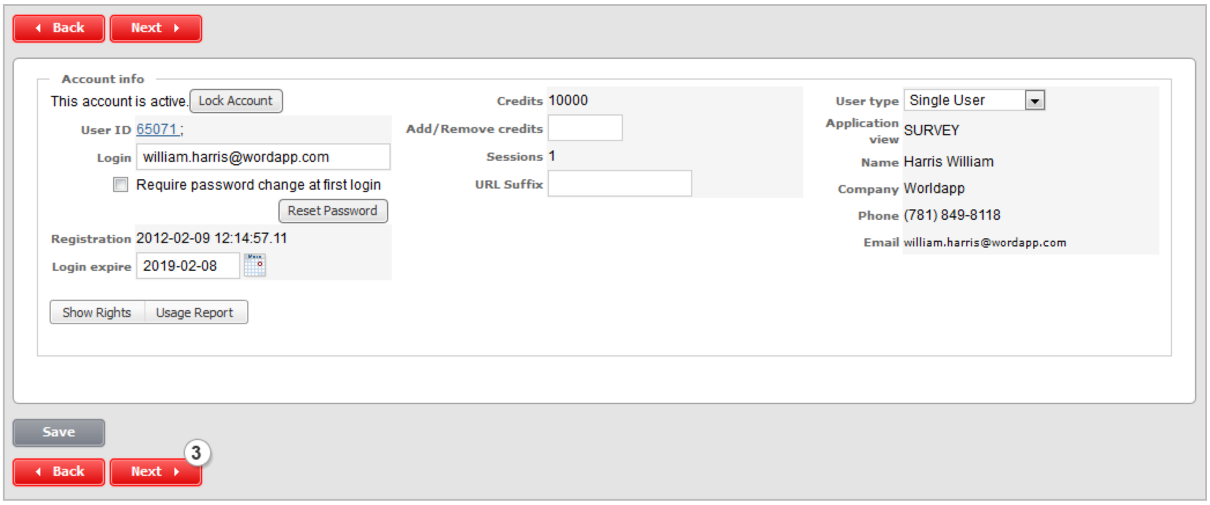
- *If you type "partial data" into a search field, all results that contain that data excerpt (in that specific field) are returned. This is true on all search fields excluding the Survey ID field. For example, if you enter "yahoo" in the Login field, all user accounts containing this domain name in their logins are returned in the search result.*
- *If you ender the number in the Survey ID field, only those user accounts tied to this survey are returned.*
- *If you leave all the field blank, the entire list of user accounts is returned in the search results.*
- *To add more credits to user account input positive integer number into the Credits field. To withdraw credits input negative integer number, for example: -35.*
- *Account password can be changed from that particular account by users themselves in the My Account page. It can be also reset by clicking the Reset Password button when editing user account. Thus the notification email with a new password will be automatically sent to the email address associated with this account.*

Editing User Accounts

1. Once you have located the user record you wish to edit, click the User ID link to open the user record.



2. Within the user record, you can edit the Login, account expiration dates, credits and User Type.



3. Use Back and Next to browse through all accounts in your workgroup.

Editable fields

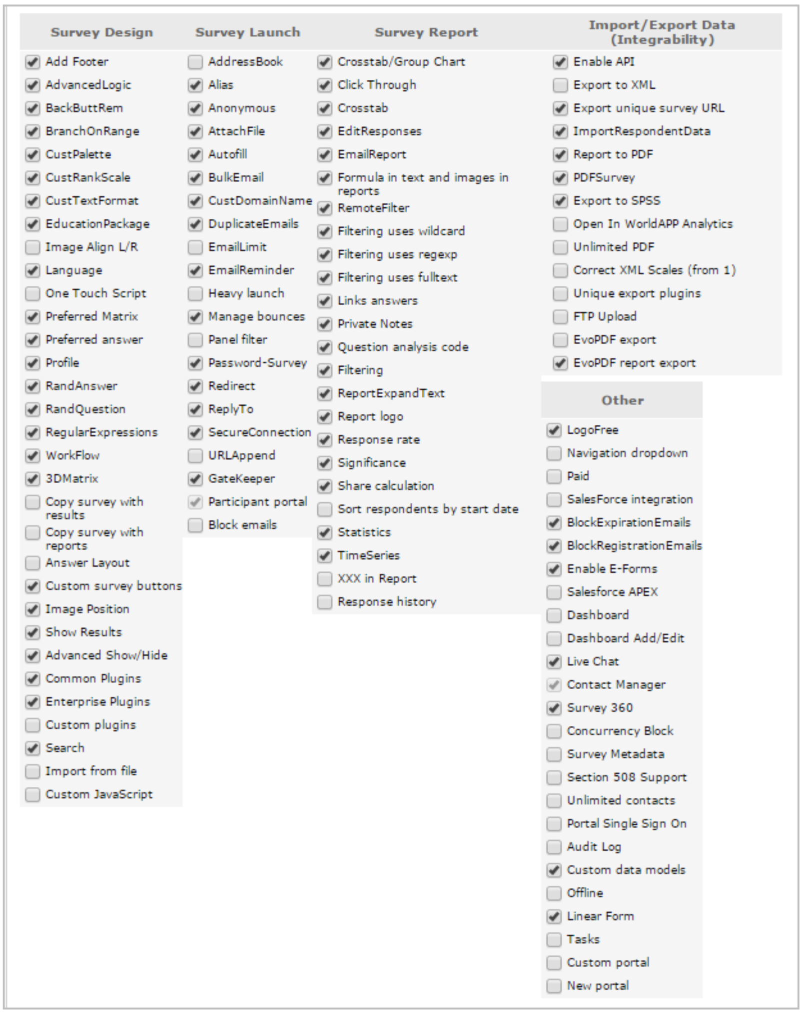
Properties	**Notes**
Login	Must be unique record throughout the system.
Login Expire	The date must follow the year-month-day standard. Eg. 2004-05-23.
Add/Remove Credits	You can add or remove credits by placing the amount to add or remove in this field. A negative amount represents removal.
URL Suffix	You can enter a suffix that will be used in all survey links of this account.
User Type	Use this dropdown box to set the user type. Sub-accounts for Multi-User and Multi-Access accounts should be created within these accounts by account holders themselves.

User Types

UserType	Description
Single User	Users can design, edit and distribute surveys and view the reports.
Multi-User Account	Users can design sub-accounts in addition to the actions performed as a Single User.
Multi-Access Account	User can create multiple logins to his single user account and specify the access limits for other sub-users of this account.
Subaccounts	Shows number of sub-accounts for Multi-User and Multi-Access.

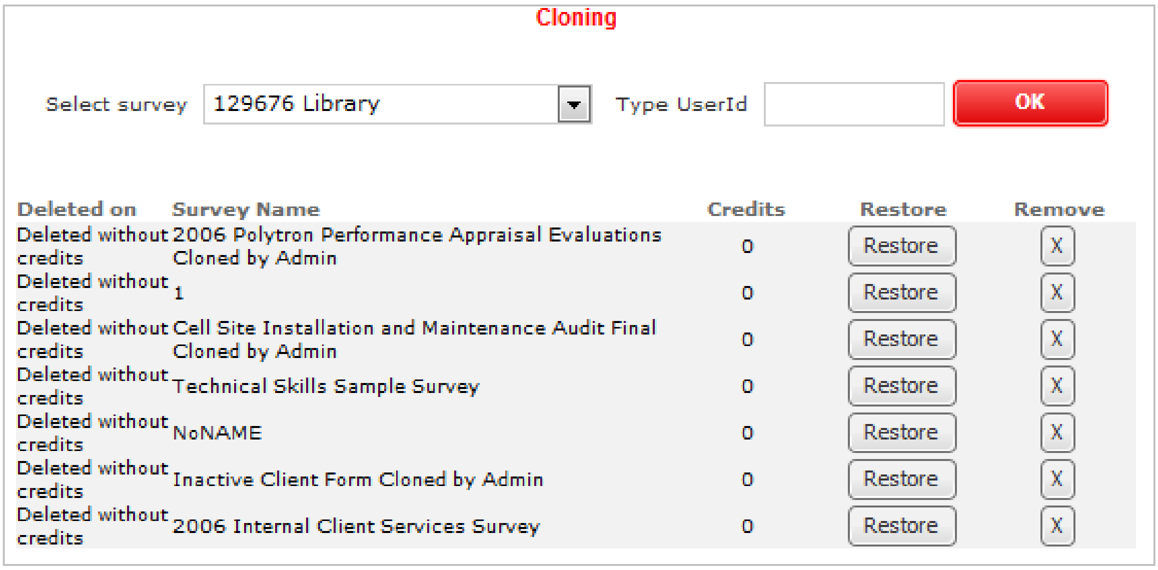
4. Click the Show rights button to display all the features. Click hide rights to collapse the list.

5. Activate and deactivate the features by clicking to add and remove checkmarks. For more details see the Features subsection of this manual.



Copy Surveys between the Accounts

1. Click Show Details to display the feature that allows you to copy surveys from other accounts, remove surveys or restore deleted surveys. Click Hide Details to hide this feature.



2. From the Select Survey dropdown box select the survey you want to copy.
3. Enter the User ID of the account to copy the survey.
4. Slick the Restore button, to restore deleted survey to that account.
5. Click the Remove button to completely remove a survey from the account.
6. Once you have finished editing, click Save to apply changes.

Features

This is a list of features, their descriptions and where in the survey application these features are used.

Features	Description	Pages containing the feature
3DMatrix	3D Matrix Allows to use the 3D Matrix question type.	Edit Question
AddFooter	Footer Allows to add a footer to your survey. It is used to add additional information at the bottom of the survey pages (for example, Copyright).	Edit Questions Survey Footer
Advanced Crosstab	Allows to create Advanced Crosstab tables in your survey report. It is to compare your survey responses according to the respondent groups.	Advanced Crosstab
AdvancedLogic	Advanced logic It is used to make flexible survey structures that allow users to dynamically organize their surveys.	Edit Questions Advanced Logic
Alias	Alias email Enables to enter the email address into the From field.	Compose Email
Anon	Anonymous response option Allows to make the anonymous survey distribution.	Email Survey Email To List Email Survey Using Address Book
Answer Layout	Answer layout Allows selecting the answer layout vertically (down) or horizontally (across) when adding or editing the specific multi-choice question.	Optional Features
AttachFile	Attach file Allows to attach files emailing link to the survey/report or survey/report itself to the respondents.	Compose Email

Autofill	Autofill Allows to import some additional information on respondents along with their email addresses. This enables to pre-populate some questions (fill in responses automatically). It is available if Bulk Email feature has been set.	Format Data File
BackButtRem	Back button removal option Allows to remove back button from the survey page.	Survey Rules
BlockExpirationEmails	Allows the admin to block expiration emails.	
BlockRegistrationEmails	Allows the admin to block registration emails.	
BranchOnRange	Branch within range (numeric values) This feature means that the next question depends on the points scored by respondent.	Branch on Range
BulkEmail	Email distribution (Bulk) Allows to import a complete database of email addresses that is saved locally on the computer. This survey can be emailed to everyone in this database at the same time.	Email To List
Click Through	Show click through rate and response rate Allows to display how many respondents opened your survey even if nothing was completed and to show the response rate.	Home
Copy Surveys with Reports	Allows to copy surveys with reports when designing survey by editing an existing survey with the help of Copy with Reports check box on Design Survey page. The feature is only available for Enterprise clients.	Design Survey

Copy Surveys with Results	Allows to copy surveys with results when designing survey by editing an existing survey with the help of Copy with Results check box on Design Survey page. The feature is only available for Enterprise clients.	Design Survey
CreditCardService	Allows multi-users to pay for their sub-accounts via pay system.	
Crosstab	Crosstab tables Allows to create reports in Cross Tab format.	Customize Crosstab
Custom CSS	Custom CSS Allows editing styles of the survey by modifying CSS code on the advanced layout editor.	Select Layout
CustDomainName	Redirect Domain Name Allows to modify the domain name in survey or Report URL.	Launch Survey
CustPalette	Custom palette Allows to change the survey layout manually if none of the predefined color schemes are suitable with the help of Basic Layout.	Select Layout>Customize
Custom Survey Button	Uploading your own survey buttons Allows uploading your own survey buttons (Next, Back and Submit) on Layout page.	Select Layout
CustRankScale	Build your own rank on scale Allows to create rank scales and edit or delete any of them.	Customize Scale
CustTextFormat	Pre-format answers Allows to customize the formats that can be used by respondent while answering questions with pre-format option.	Customize text format

DuplicateEmails	Allow duplicates Allows to make the bulk distribution of the email-invitations to the respondents with the same email addresses but with different unique codes in the data file. You can distinguish the survey results using unique codes and other attributes from the file for autofilling.	Email To List Format Data File
EditResponses	Edit responses (by request) Allows to edit survey results of the respondents.	Report by respondent
EducationPackage	Allows to set a time limit to fill in a survey and view the total score for each respondent in the report if the answers have been supplied with point values.	Launch Survey Branch on Range
EmailLimit	Allows to limit survey distribution. Maximum limitation is under 200 emails.	
EmailReminder	Email reminder This is an email that is sent to respondents whose email addresses are in the survey Incompletes list.	Email Reminder
EmailReport	Manual report distribution/Scheduled report distribution Allows to email the report or link to it. On the Feature List Scheduled report distribution is not available in basic plan.	Email Report
Enable API	Enables API.	Administration Page
Export Unique Survey URL	Exporting unique survey URL into Excel Allows exporting the unique survey URL of each respondent along with the results into Excel	Export to Excel
Export to XML	Allows to export your survey to XML by clicking the Export to XML button on	Survey Home

	Survey Home page. The feature is only available for Enterprise clients.	
Filtering	Filtering on text, email address, date Allows to apply complex filtering to the report. One can specify which responses to show in the report.	Advanced Filter
Formula in text and images in reports	Allows to create and insert formulas in the text of the report elements.	Text and Images
GateKeeper	GateKeeper Allows multi-users to manage (to permit or forbid) the launch of the sub-user's survey.	Administration Page
Heavy Launch	If this check box is selected, the user account will be not checked up for heavy launch index by the system. The check box is not selected by default.	
Image Align L/R	Allows to set the alignment of the image (left, center, right) in top position and add arrows (Up Left, Bottom Left, Up Right, Bottom Right).	Add Image
Image Position	Image Position Allows positioning the image (left, top, right) relative to question text.	Add Image
ImportRespondentData	Import responses Allows to upload responses from CSV file in your survey.	Launch Survey Upload responses
Language	Allows to select the language for the pop-up alerts and to design a survey in different languages.	Survey Rules
Links Answers	Allows to specify the way the information about responses to specific questions will be displayed in online report.	Report Rules
LogoFree	Allows to remove the Powered by KeySurvey logo from the survey and	Report by respondent

	report pages if LOGO_ATTACH=TRUE as well.	
Manage Bounces	Enables the possibility to track the delivery of email messages on Email Results page	Email Results
Multiple SKU	Allows to combine several answer choices under a title and make summary analysis according to each question.	
Navigation Dropdown	Allows to navigate through the account pages using the dropdown box.	
Paid	A flag that is set on the account after user's payment.	
Panel Filter	Allows to filter the addresses according to the results of the selected surveys.	Address Book
Password-Survey	Individual Password ID (requires Autofill) Allows to protect the surveys with individual passwords. To take advantage of this feature the subscription plan must include Email distribution (Bulk), Survey Password and Autofill options.	Password Autofill Format Data File
PDFReport	PDF Report Print Allows to convert the report to PDF format and to print it.	Print Report
PDFSurvey	PDF printing Allows to convert surveys to PDF format.	Home
Preferred answer	Allows to use the Skip with alert option. If respondents do not answer the question with the Skip with alert option and submit the survey, they will be prompted to answer it but still they can skip it.	Survey Questions

PreferredMatrix	Most preferred matrix Allows to use the Compare one against another question type.	Edit Question
PrivateNotes	Private Notes Allows to enter comments on the survey results of the respondents.	Edit Questions Summary Report
Profile	Student/Teacher Allows to design profile surveys.	Prepopulated Overlay Survey Edit Questions Home
One Touch Script	Allows respondents to go to the next page by selecting one of the radio buttons on the page with only one Pick one type question.	Survey Settings
RandAnswer	Randomize answers Allows to display the answers in random order.	Edit Question
RandQuestion	Randomize questions (2 modes) Allows to display the questions in random order.	Edit Questions
Redirect	Allows redirect to any URL after survey submission Enables to redirect the respondents to the necessary website after they have submitted the survey.	Survey Rules
RegularExpressions	Regular expressions text verification Allows to use regular expression for designing the formats.	Customize text format
RemoteFilter	Remote Filter Allows to email the report link including the summary report to the person who can add filters to the survey results.	Report Rules Summary Report
ReplyTo	Reply to Allows to fill in the fields for Reply address and undelivered emails.	Compose Email

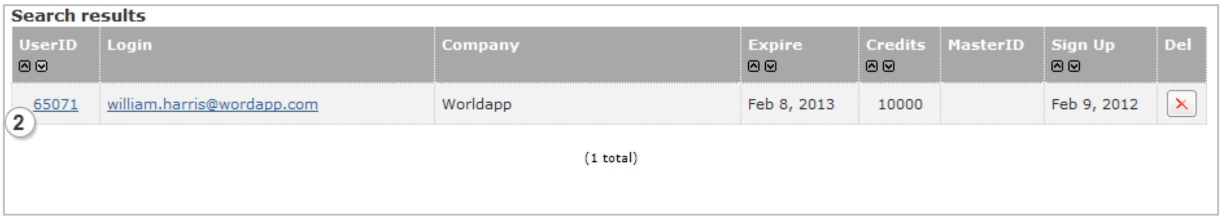
ReportExpandText	Expand text Allows to expand text responses in online report. It should be activated on the Customize Report page.	Report Questions Summary Report
Report Logo	Allows to attach report logo.	Report Layout
Response Rate	Allows to show the response rate % (which is total number of completed surveys multiplied by 100 and divided by total number of completed and incompleted surveys) in the Completed column in parentheses.	Surveys
SecureConnection	SSL encryption option Allows to secure all survey data by encrypting it.	Launch Survey
Share Calculation	Allows to create a table or graph to show results of share calculation in online report and PDF.	Share Calculation
Significance	Allows to create a table or graph to show results of significance testing in online report.	Significances
SPSS	Export results to SPSS Allows to export the survey results into SPSS.	Report Publish Options
Sort Respondents By Start Date	Sort Respondents By Start Date Allows sorting the reports by date the respondents started to take the survey.	
Statistics	Statistics Allows to view statistics of survey distribution.	
TimeSeries	Time Series Allows to add time series table and graph to your report.	Report Questions Time Series Graph
URLAppend	URL ID append Allows to open a survey page if a suffix is in the URL.	Launch Survey

WorkFlow	WorkFlow alert/Email Alert Enables to receive emails or send them to the respondents or to any other email addresses when a particular response is selected.	Email Alert To
XXX in Report	Allows to hide the results for questions with less than X responses. If there are less than X responses to a certain question they will be displayed as XXX in the Summary Report mode.	

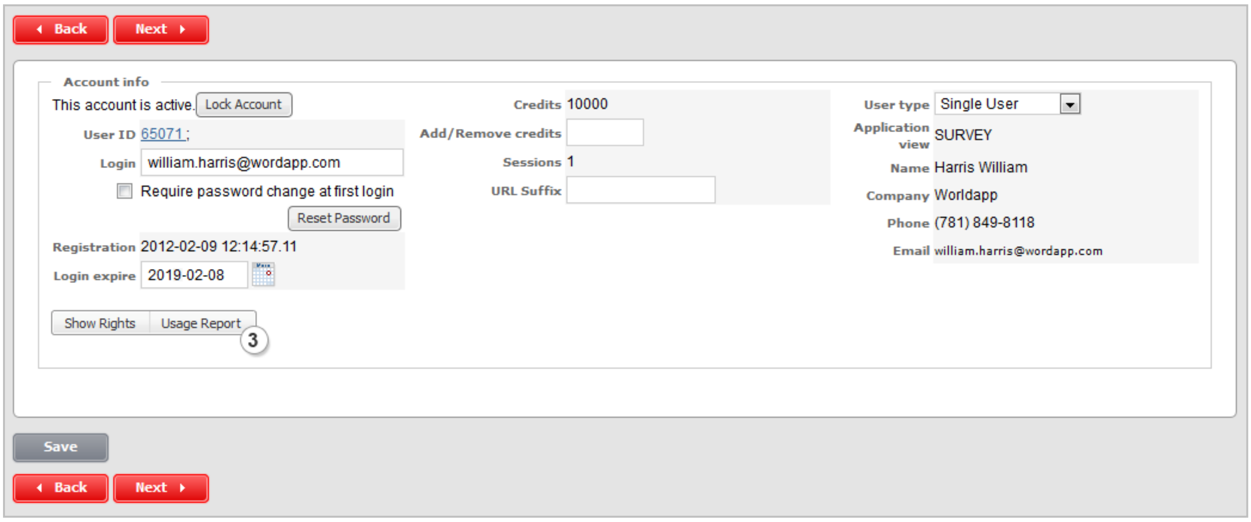
Usage Report

As an administrator you can track user's statistics and actions data, such as: number of surveys created, number of credits used, number of responses per all surveys and others.

1. Search for a certain account to see the statistics report.
2. Click on the user ID hyperlinked number to open Edit User Account.

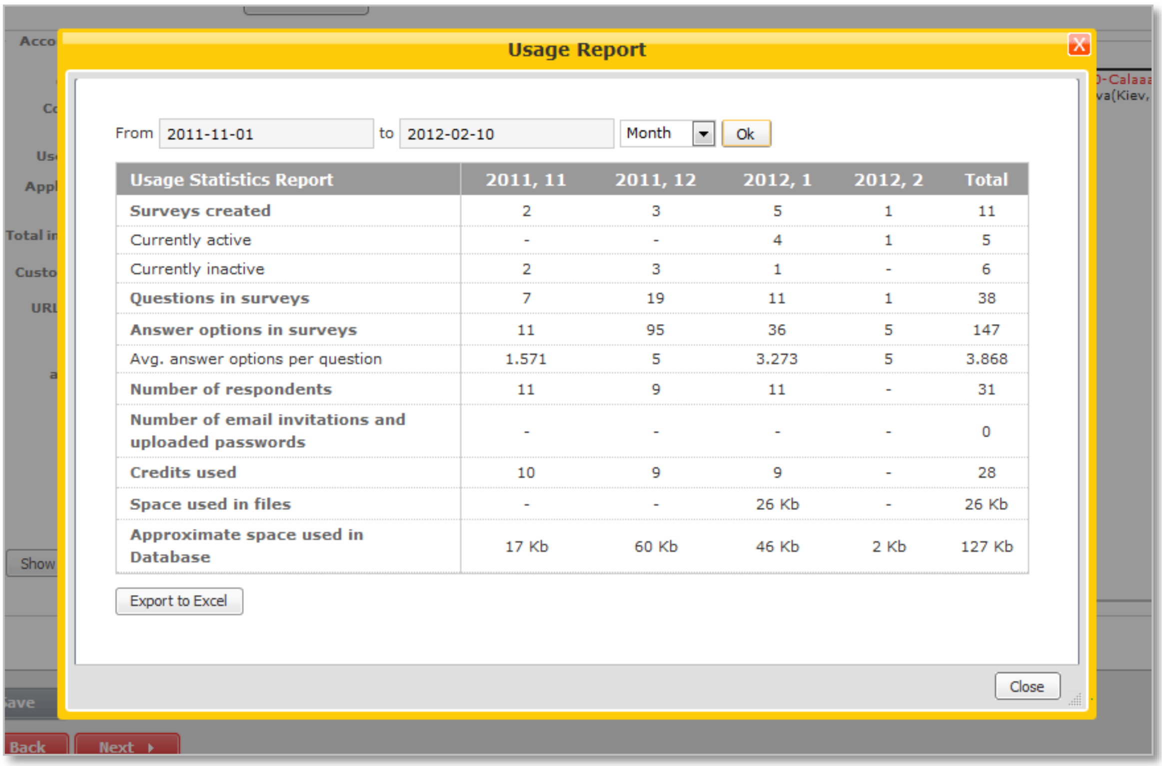


3. Click the Usage Report button.



4. Set the From and To report dates to set the time interval to see the account statistics.

5. Select the option to group statistics records by and click the Ok button.



Usage Statistics Report	2011, 11	2011, 12	2012, 1	2012, 2	Total
Surveys created	2	3	5	1	11
Currently active	-	-	4	1	5
Currently inactive	2	3	1	-	6
Questions in surveys	7	19	11	1	38
Answer options in surveys	11	95	36	5	147
Avg. answer options per question	1.571	5	3.273	5	3.868
Number of respondents	11	9	11	-	31
Number of email invitations and uploaded passwords	-	-	-	-	0
Credits used	10	9	9	-	28
Space used in files	-	-	26 Kb	-	26 Kb
Approximate space used in Database	17 Kb	60 Kb	46 Kb	2 Kb	127 Kb

6. Data is grouped by selected period and one more column that shows the total number per each record is added at the end of the table.
7. You can export the data to Excel and analyze it externally. Click the Export to Excel button for that.

LDAP Users

LDAP (Lightweight Directory Access Protocol) is an open standard for a user security repository and authentication mechanism.

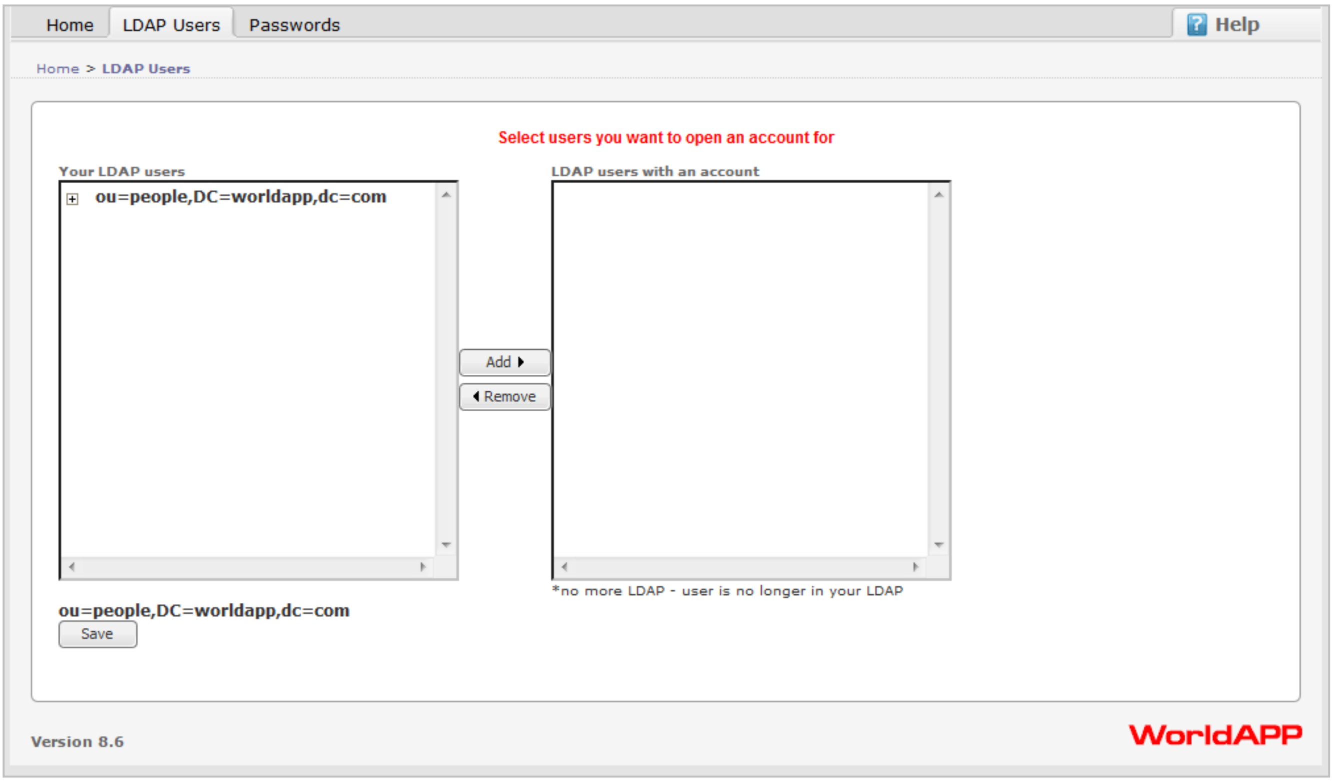
This feature allows managing users accounts stored inside an LDAP directory. Using LDAP, you can automatically create user accounts within application and prevent users from having to enter the login and password when accessing the account.

Accessing an LDAP user database requires specific connection information about the LDAP server. To take advantage of the LDAP functionality, the server administrator firstly should adjust the LDAP server's parameters in the configuration file of the deliverable application.

The list of parameters to be modified:

- **ldapHost –** the IP address of the LDAP server;
- **ldapPort –** the LDAp server's port;
- **ldapUser –** the user name in LDAP;
- **ldapPassword –** the user's password in LDAP
- **ldapBaseDnList –** the list of LDAP paths, delimited with semicolon.

After that log in the administration account and click the LDAP Users button to manage users.



The following page enables you to create accounts in the application for the selected users.

1. User the **Your LDAP Users** list box to select the specific user.
2. Click **Add** to move the user to the **LDAP Users** list.

3. To remove the added users, select them from the **LDAP User** list and click the Remove button.

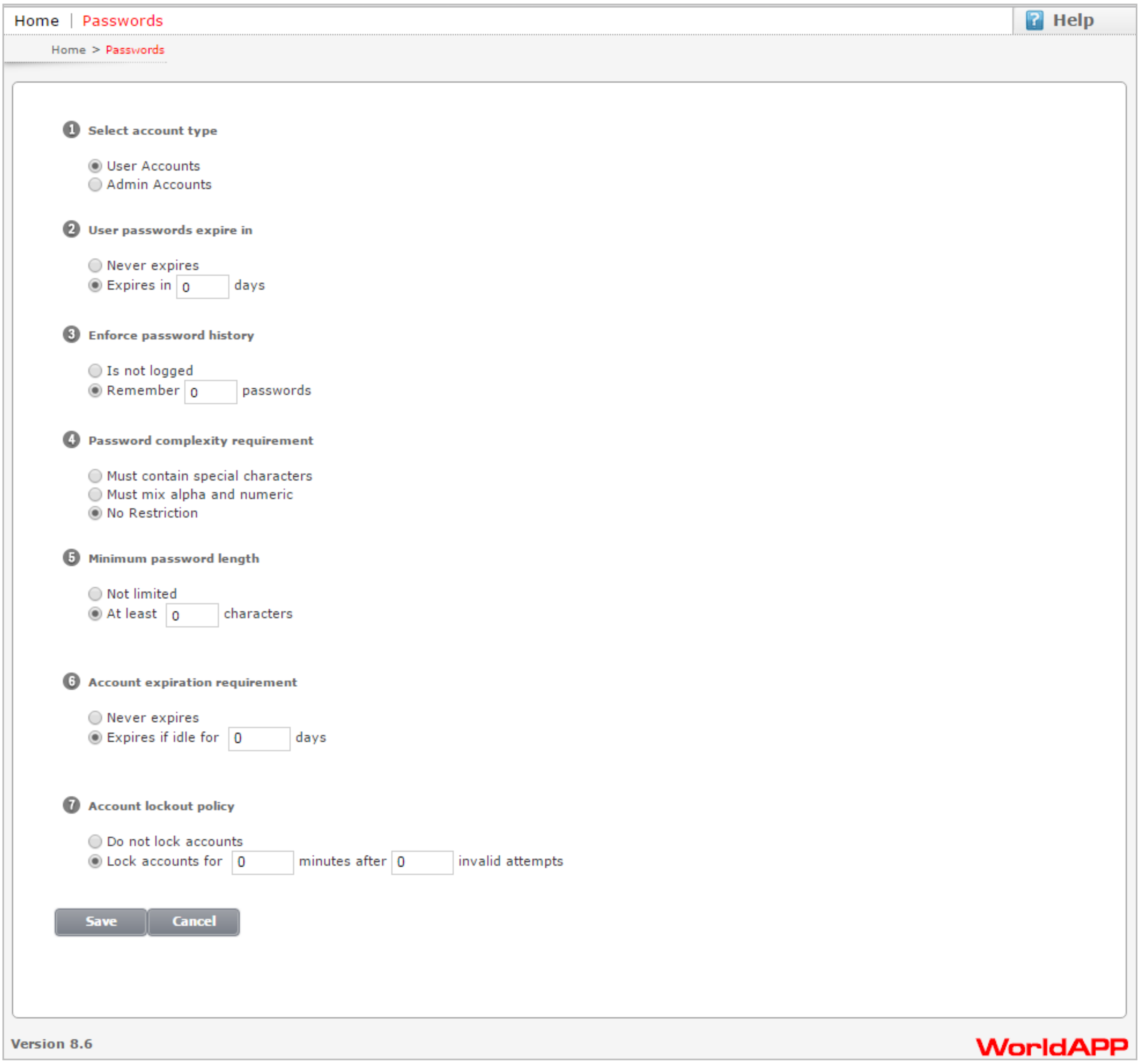
Notes:

- Hold down **CTRL** and click the left mouse to select several users at once.
- The user marked with asterisk* is no longer in your LDAP list.
- Click the **Save** button for the changes to take effect.

Security Setup

On the Security Setup page you can set up the security regulations and manage the password settings for all account types. Using this administration resource, you can adjust the security policy of the account access, reset the passwords, deactivate and reactive the accounts.

To access the security settings you need to log in the administration account and click the Passwords button.



This page provides the possible security settings:

1. User passwords expire in. Allows you to manage the password validity term. The supported options are:
    - *Never Expires(by default)*
    - *Expires in .. days (The value must be between 0 and 365).*
2. Enforce password history. Enables you to determine the number of unique new passwords that have to be associated with a user account before an old password can be reused. The possible options are:
    - *Is not logged(by default)*
    - *Remember .. passwords(The value must be between 0 and 10).*
3. Password complexity requirement. This security setting requires the password to met the complexity requirements. The possible options are:
    - *No restrictions(by default)*
    - *Must mix alpha and numeric(the password must contain at least one numeral on one letter);*
    - *Must contain special characters (the password must contain one of the following non-alphabetic character: 1,”,#,$,%,&,’,(,),*,+,-,/,:,;,<,=,>,?,@,[,\,],^,_,{,/,},~).*
4. Minimum password length. Enables you to set the minimum password length. The supported options are:
    - *Not limited(by default);*
    - *At least characters (The value must be between 0 and 16).*
5. Account expiration requirement. Allows you to limit the term the account can stay idle. The *possible options are:*
    - *Never expires (by default)*
    - *Expires if idle for .. days (The value must be between 0 and 365).*
6. Account lockout policy. This setting disables a user account if an incorrect password is entered a specified number of times over a specified period. You may set the following option:
    - *Do not lock account (by default);*
    - *Lock accounts for .. minutes after .. invalid attempts (the value must be more than 0 for minutes and between 1 and 10 for attempts).*

Notes:

- Click the **Save** button for the changes to take effect. Changes will be applied for all accounts.
- Click the **Cancel** button to undo all actions up to the last save one.

Template Account

Template account is a system account that is used to create and store survey and question templates ad well as custom themes. Later they can be used in regular and workgroup accounts by regular users.

The default template account name that goes with your installation is "**template**".

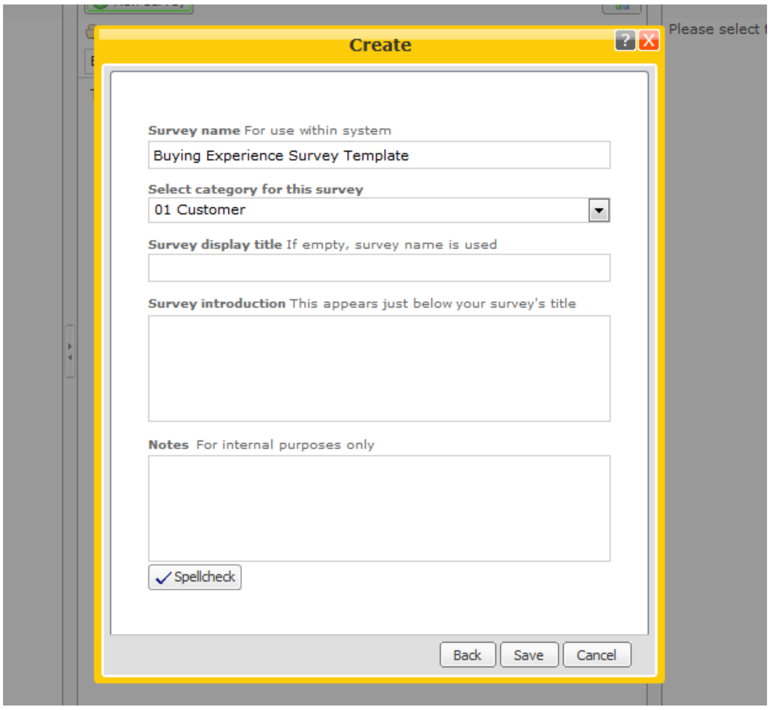
When you log in to the template account you will see the list of folders that contain default template surveys, CSS templates and question library available for your regular users.

Creating survey and Question Templates

Survey templates are available for all accounts within your environment and are used for quick survey creation. They are divided into categories and contain list of commonly asked questions depending on the category they belong to. Users that create new survey using templates can then customize newly created surveys within their personal accounts by adding new questions, deleting or editing predefined questions.

To add new survey template:

1. Click the New Survey button from the Surveys home page of the template account.
2. Select the "From Scratch" option to create survey template by adding questions manually.
3. Select the "Use a Template" option to create survey template by customizing existing template.
4. Give unique name to your survey template.
5. Select the category you want to create survey for. Use the Templates section to add survey template or Question Library section to add current survey questions to the library for public use.



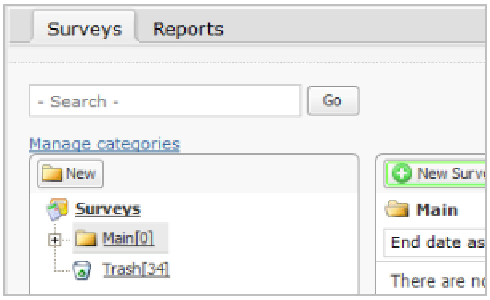
6. Click Save button.
7. Add as many question to your survey as you need and proceed with other survey design procedures if necessary.

Now your survey template or questions from the Question Library are available for all users.

Template Management

By default all template surveys and questions from the Question Library are organized within different categories. On the Template Management page you can customize these categories or add new ones.

1. Click the Manage Categories link at the left top of the template account Surveys home page.



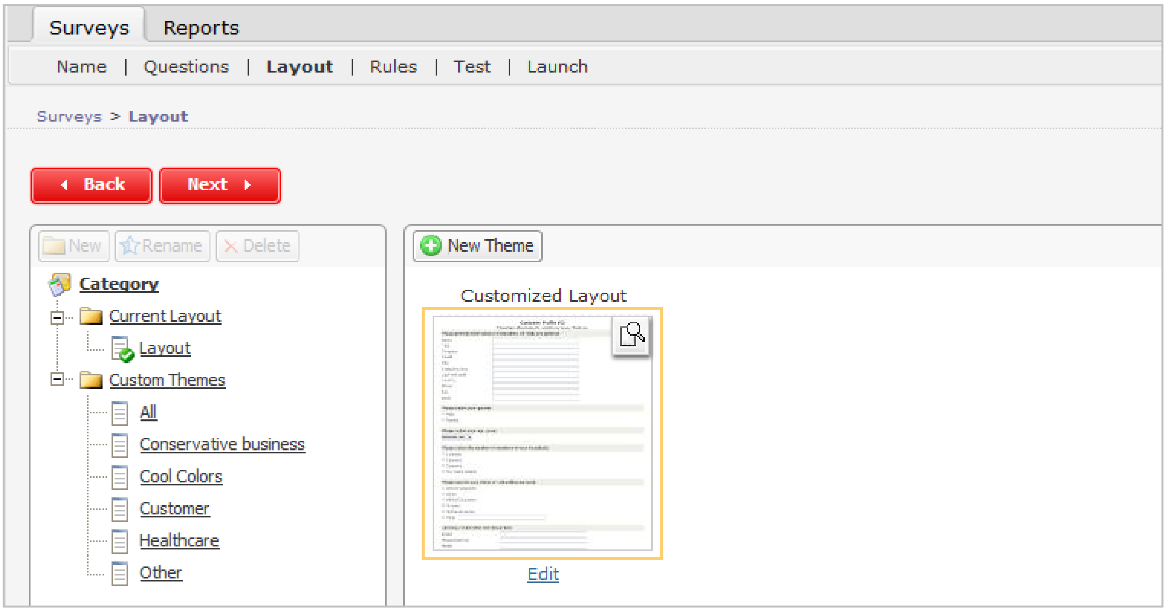
2. Select the category you want to edit and click the Edit Category button.
3. Edit category name and assign group where this category should reside. You can also number category by typing its number. The check box available next to the numbering fields shows or hides the category from the templates list.
4. Click the Save button to apply changes.
5. Go back to customize other template account properties.

CSS Templates

Along with the form/survey and question templates you can create CSS templates (templates). They can later be used by regular users to improve survey design and appearance from the Layout page.

1. Create new form/survey from Scratch or use available templates. Follow the default form/survey design steps.

2. Go to the Layout page.



3. Select the Custom Themes category from the Category pane in the left and click the Rename button to customize existing categories.

4. Click the New button to create new custom category.

5. Click the New Theme button to add new theme template.

6. While creating categories or themes follow the Standard steps.

7. When this is done, regular users will be able to use CSS templates and apply them to their forms/surveys within just a few steps.