smarter drafter PRO
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Log In with SSO and Navigation

Help Guide

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# Log In with SSO

When logging into an established Smarter Drafter account, SSO is used. Follow these steps.

1. Click **Login with SSO** in the Smarter Drafter login page.

2. The first time you use SSO, you will be asked to type your email address for authentication.

3. When authentication is successful, you will be required to tick a box to consent to requested data permissions on behalf of the organisation (this will only occur once).

4. Click **Accept** to accept the terms and conditions.
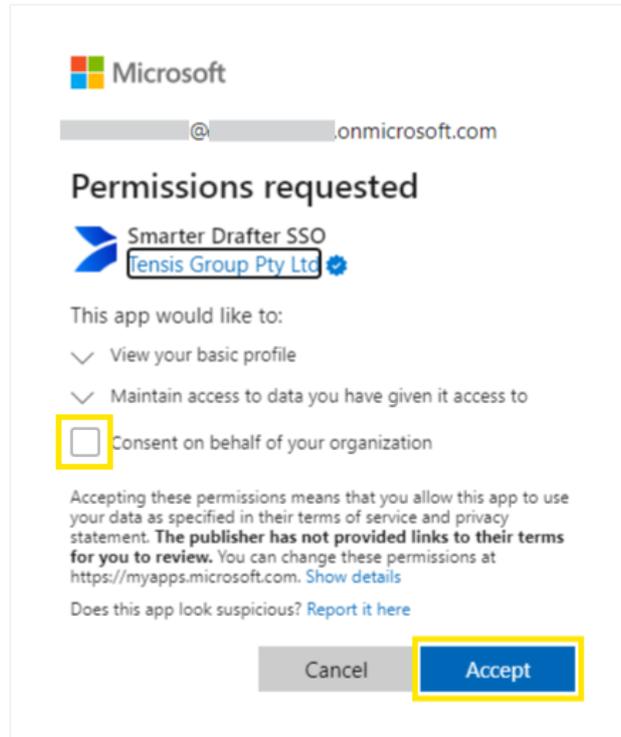
Navigate the Dashboard

The Smarter Drafter dashboard opens. The layout includes:

1. **N**avigation menu on the left side, which provides access to the key functional areas of Smarter Drafter.

2. **My Team** panel, where your team members are listed.

3. **Favorite Forms** panel, where recently opened forms can be accessed with one click.

4. Engagement analytics about the forms in use, including the number of submissions by date and the number of submissions by form.
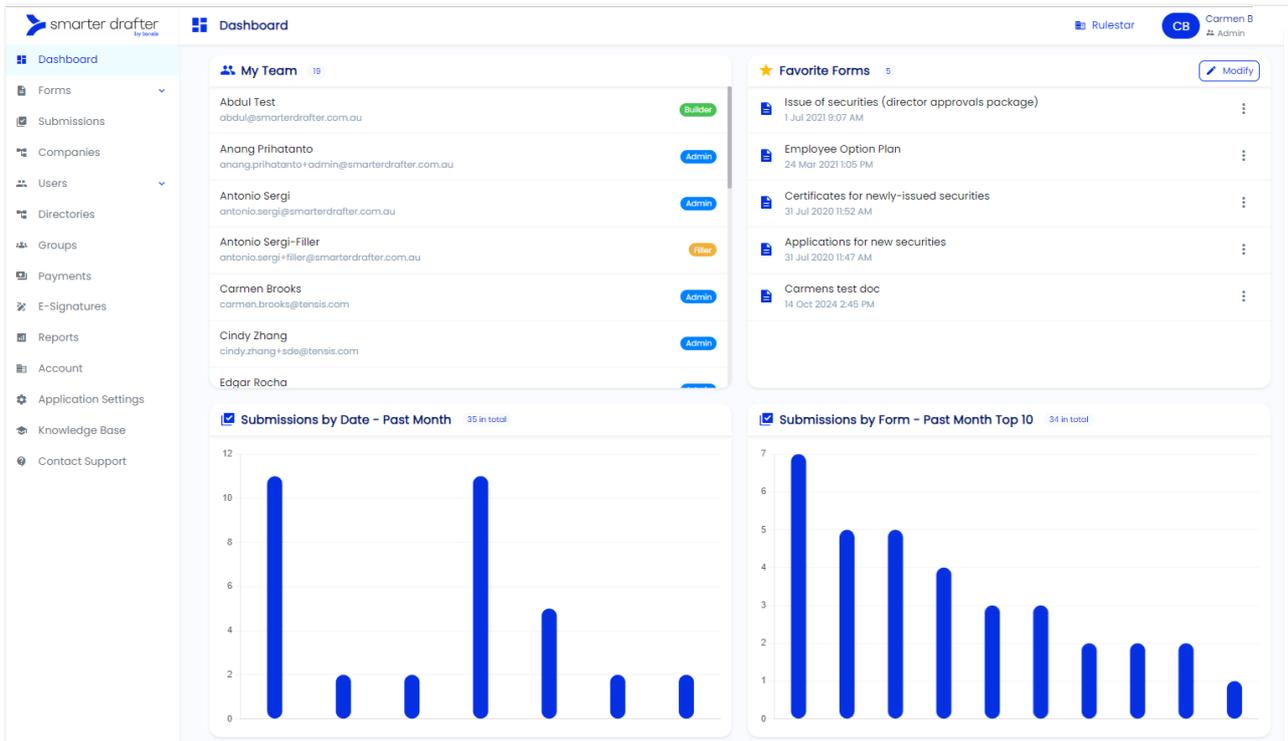
Hover over the engagement analytics to reveal more detailed information, such as the number of engagements by date.
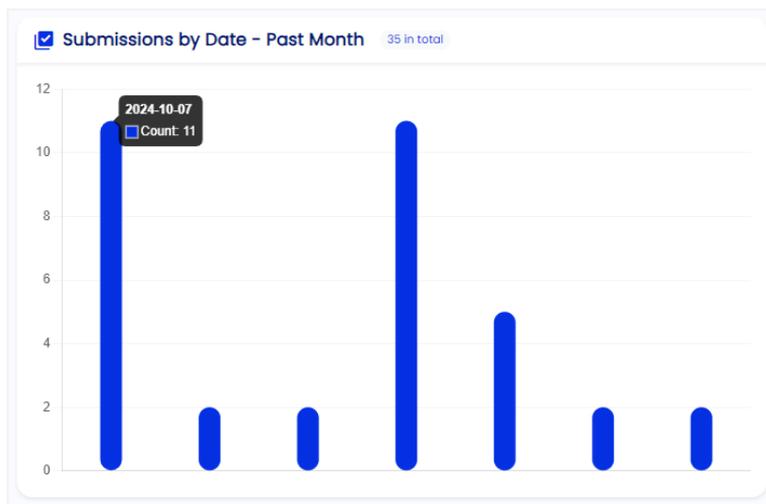
Create a List of Favourites

Click **Modify** to add forms to the **Favorite Forms** list.

When you click the **Modify** button (above), a **Highlight Forms for Dashboard** pop up opens.

1. Expand the headings to find your favourite forms. Select the forms you wish to have in the **Favorite Forms** list - they will appear grey when they are selected.

2. A number of total selected forms appears on the **Save** button, tallying the forms that will be listed in the Favourite Forms.

3. Click **Save** when you are finished selecting forms.
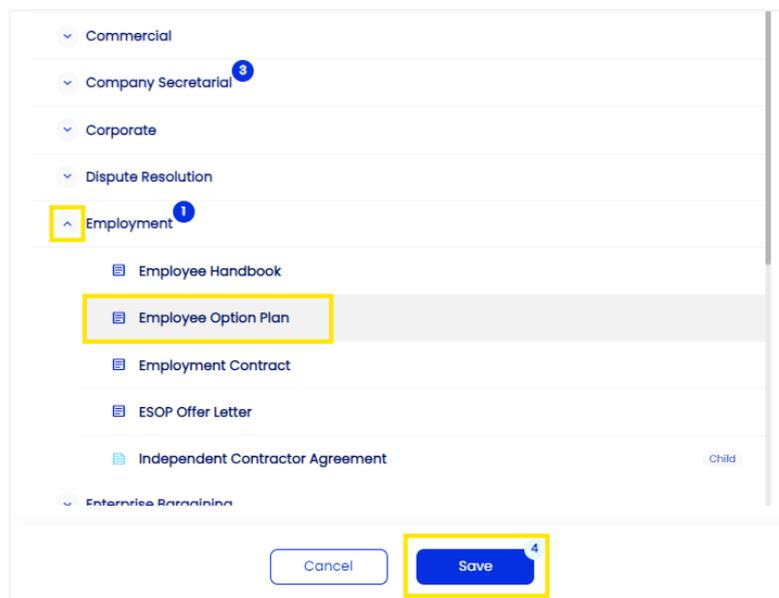
The selected forms appear in the **Favorite Forms** list on the dashboard. Click the **ellipsis** (three vertical dots) to use the form.

1. **Build** opens the form in the **Form Builder**, where it can be modified at the back end.

2. **Fill** opens the form in its final published state, where it can be filled in as an end user.