

Forms Admin

The Forms module allows organizations to create and manage digital forms for special requests and communications with users. This article is for OPS-COM administrators who need to set up, configure, and manage these forms.

Setup & Configuration

The Forms module has been refactored with new functionality and **new forms are only operational on the OPS-COM app**. Any existing forms created in the old format are not compatible and will need to be **recreated** using the new form builder.

To manage forms, administrators require specific permissions:

1. Go to **System Configuration, Admin Management**, and click **Manage Roles**.
2. Select the relevant administrator role and click **Permissions**.
3. Under the **Users** tab, ensure the **Edit Forms** and **View Forms** checkboxes are enabled.
4. Click **Save**.

Using this Feature

Administrators can view, edit, or create new forms from the **Forms** page.

Accessing the Forms Module

Go to **User Management, Forms**, and click **List Forms**. A list of all existing forms will display.

Available Actions & Buttons

- **+Add Form:** To create a new form, click the **+Add Form** button. This will open the new form builder, allowing you to design and configure your form from scratch.
- **Edit Form:** To modify an existing form, click the **Edit** icon (*pencil icon*) next to the form in the list. This will open the form builder where you can make changes.
- **Entries:** To view all users who have filled out this form, and their information.
- **Copy:** To create a copy of a form, click this button. It is added to the bottom of the list.
- **Archive:** To archive a form so it can no longer be used, click this button. Its entries and information will remain saved.

- **Export:** This button downloads the form to your device through the browser's download manager in a **.xls** format (Microsoft Excel Spread Sheet)

Best Practices & Considerations

- **Recreate Old Forms:** Remember that existing legacy form data is **not compatible** with the new format. You must **recreate** any old forms using the new form builder for them to function on the OPS-COM app.
- **Permissions:** Regularly review and ensure that the appropriate administrator roles have the necessary **Edit Forms** and **View Forms** permissions to manage the forms effectively.
- **Form Design:** When creating new forms, consider the user experience on the OPS-COM app. Keep forms concise and clearly structured to ensure ease of use for end-users.

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