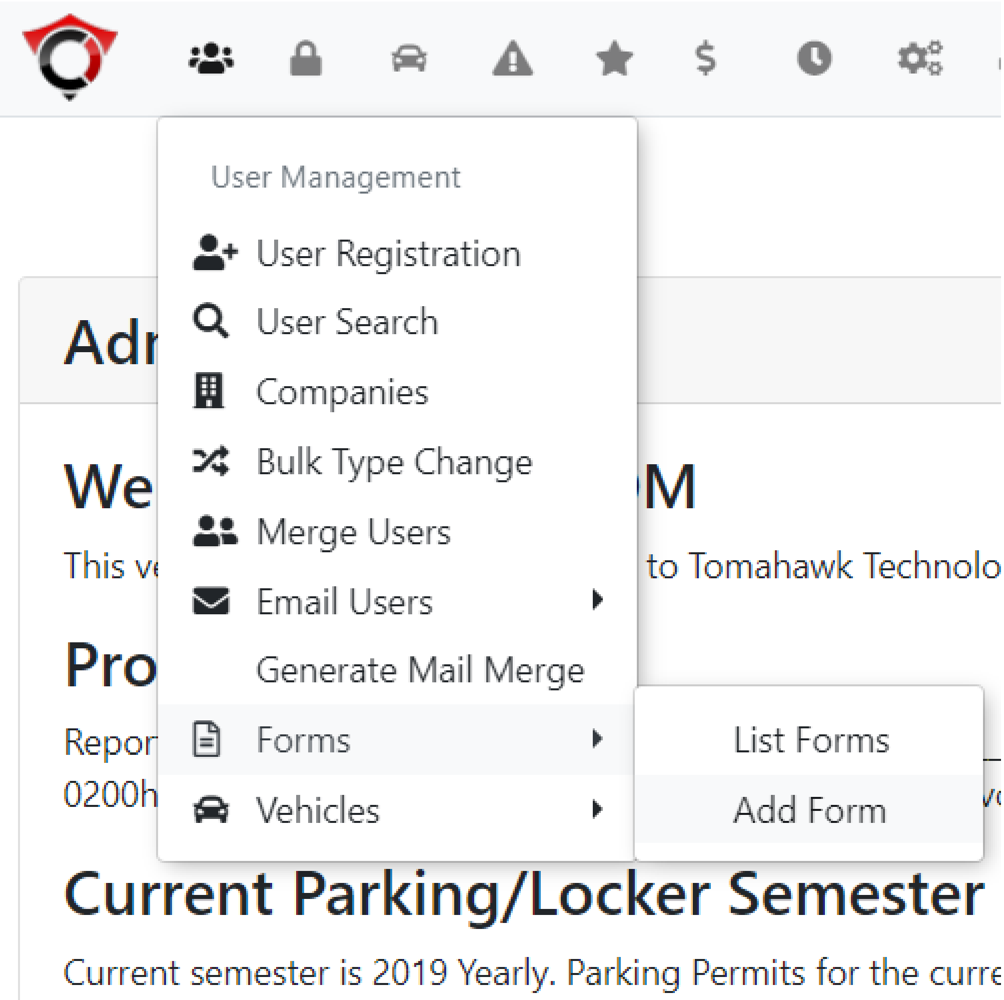
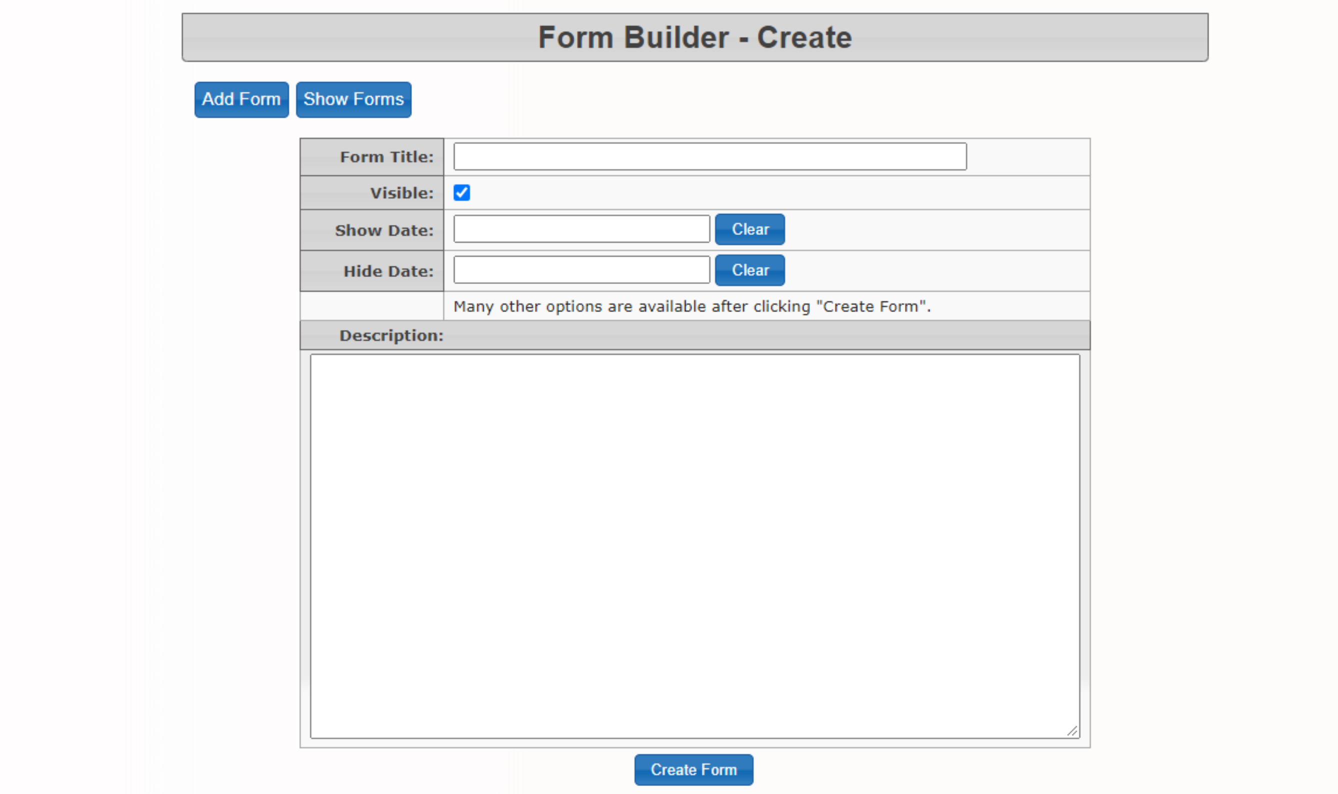
Adding Forms (old forms)

To add a form on your user side hover over **User Management** followed by **Forms** and click **Add Form.**



The **Form Builder - Create** screen will display, some options will be available after clicking **Create Form**.

- Enter the **Form Title**.
- Enable the checkbox if you want the form to be visible on the user side.
- Enter the dates that you want the new form to be visible/hidden to users. If you leave the dates blank the form will always appear on the user side.
- Enter a brief description of the form and click **Create Form** when finished.



After creating the form the **Form Builder - Edit** screen will appear with three additional tabs that must be completed. **Form Description, Post Form**, and **Questions**. You will also have the option to add an **External Form** field. Ensure you click **Update Form** after each tab is completed to save the form details.

Form Description

External Form

By supplying a URL in the External Form field, you can link to other forms created by third-party systems such as Survey Money. The URL must have https:// in front of it. EX: https://google.ca. Adding a URL such as www.google.ca will not work.

The **Form Description** tab is pre-filled with the information you submitted on the previous screen. Administrators have the ability to edit the details.

Post Form

The **Post Form** tab is where administrators provide instruction for what happens after the form is completed/submitted by the user. Enable the appropriate checkboxes for the actions that should take place when a user submits the form. If you select the option to **Mail to specified email**, administrators must provide the *Email Subject*, an '*Email To*' address and '*Email From*' address. Enter the message text that you want to appear on the form completion page when a user submits their form.

Take Note

If you select the option to '**Show the form submission back to the user**', you must copy/paste the following token message into the Completion Text field:

- [%%FORM_RESULTS%%] - ARO user side (user paths end in .aro)
- {$FORM_RESULTS} - PHP user side (user paths end in .php)

Questions

The **Questions Tab** is the area where form questions are entered and the form database is built. Depending on the type of questions that are being asked, administrators will be asked to complete additional fields. Click the **Add** button to add additional questions. As labels/questions are added, they will appear at the top of the screen. The **Switch** image (Image not found or type unknown) to the left allows administrators to change the order of the labels/questions. The **Edit button** allows administrators to edit label/questions information.

- The **label field** is the question/name for the information that is being requested.
- The **type field** formats the question based on the type of data that you are requesting (e.g. text field, number field, radio buttons, checkboxes, etc.).
- The **Required checkbox** indicates the field must be completed by the user.
- The **Tooltip box** allows you to provide a field description for the information you are requesting which can be seen by users when they hover over the fields that need to be completed or for admins reviewing the forms.
  New in October 2016
  Users can now attach files to their form submissions.

Click the **Update Form** button to save changes.

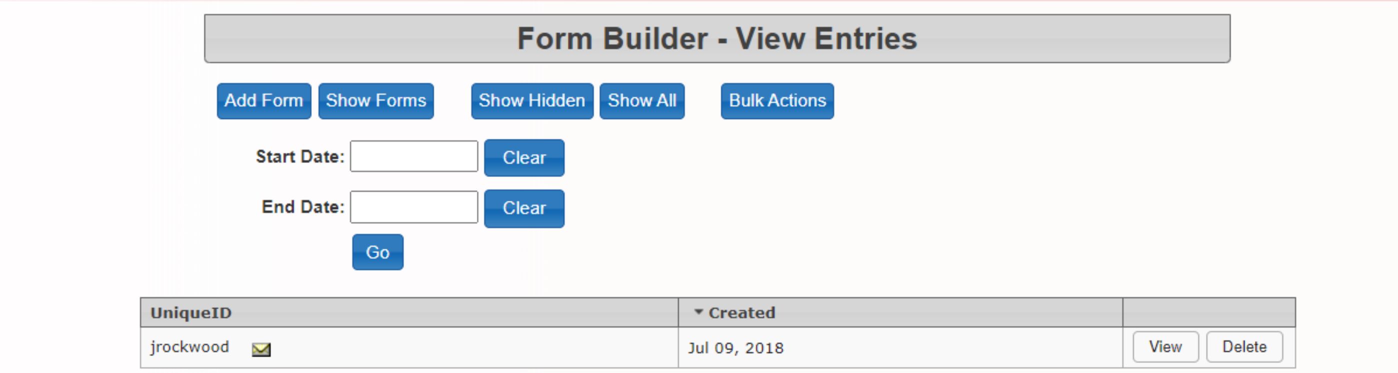
(TBD) A new tab for **Report Options** becomes available after you update the form. This tab allows administrators to specify how they want to show/hide the form data in their reports.

The *first section* allows administrators to specify which of the four fields they want to be able to display on the summary report to help you identify what form entry you want to view.

The *second section* allows administrators to specify which of the four fields they want to be able to hide on the summary report if it has a value. This is useful for hiding the forms that have been approved.

Take Note

Additional fields can be shown in a report by using the **Bulk Actions** button when viewing a form summary report in the List Forms (old forms) option.



The form results are found under the Show Forms button or List Forms option in the User Management menu.

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