Forms Module

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Forms Admin

> The Forms module allows organizations to create and manage digital forms for special requests and communications with users. This article is for OPSCOM 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 OPSCOM 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,** then **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.

<u>Available Actions & Buttons</u>

- **+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 (*<u>pencil icon</u>*) 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 OPSCOM 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 OPSCOM app. Keep forms concise and clearly structured to ensure ease of use for end-users.

Viewing Form Entries

> This article describes how to view, search, and manage user submissions for custom forms. This feature provides administrators with the tools to find specific form entries, review submitted data, edit information, and communicate with the submitter.

Using this Feature

The process involves searching for specific entries and then managing them individually from the entry view page.

This functionality requires that a form has already been created and submitted by users. The search options available on the Form Entries page are dependent on which fields were marked as "searchable" during the form's initial setup. For more information, please see the *Creating a New Form* article.

Searching for Form Entries

- Hover over **User Management**, then hover over **Forms**, and click **List Forms**.
- Find the desired form in the list and click the **entries** button.
- On the **Form Entry Search** page, use the **Start date** and **Up to and including** fields to set a date range.
- Use the **Show in results** multi-select box to choose which searchable columns will be displayed in the results list.
- To filter by specific answers, click the **toggle more options** button. This will reveal text boxes for each searchable field where you can enter a search query.

- Click the search button to generate the list of entries. From the results list, click on an individual entry to view its full details.

Working with an Individual Entry

The **Entry View** page displays the submitter's information and all of their answers. From here, you can perform several actions:

- **Viewing and Editing Data**: An administrator can edit any of the user's submitted answers or add values to any **Admin-Only Fields**. Click the save button at the bottom of the page to apply any changes.
- **Replying to the User**: Click the **prepare email** button at the top of the page. You will be taken to the email composition screen with the user's email address and the form's name pre-filled as the subject line.
- **Deleting an Entry**: Entries can be deleted directly from this page.

> Editing a user's form entry changes the data stored in the database.

Visual Cues

- Fields marked as **Admin-Only** are indicated by a blue border. Hovering your mouse over this border will display a helpful tooltip

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Best Practices & Considerations

- **Use the 'toggle more options' feature for powerful, targeted searches.** For example, you can find all submissions where a user answered 'Yes' to a specific question by entering 'Yes' into that field's search box.

- **Admin-Only Fields are never visible to the end-user.** Use these fields to add internal notes, status updates, or other administrative data related to the submission.

Form Field Types

> This article provides a detailed overview of the various field types available when building a custom form. Its purpose is to help administrators understand the function and configuration options for each field, enabling them to create effective and user-friendly forms.

Field Types and Options

The field types described below are the building blocks used within the form creation tool. No special system configuration is required to use them. For a complete guide on building a form, please refer to the *Creating a New Form* article.

Checkbox Group

Used to allow a user to select **one or more** options from a list.

- **Enable “Other”**: Allows the user to input a custom value not present in the options list.
- **Options**: The list of choices for the user. Options can be pre-selected for the user by enabling the checkbox next to the desired item.

Date Field

Used to get a date from the user, who will be presented with a calendar date picker.

- **Type**: The type of date field.

- **Min / Max**: The minimum and maximum allowed dates that can be selected.
- **Step**: The date increment steps.

Header

Used to display a header or subheader on the form. This is a display-only field.

- **Label**: The header text that will be displayed.
- **Type**: The header size (e.g., H1, H2).

Number

Used to accept numerical digits only.

- **Type**: The type of number field.
- **Min / Max**: The minimum and maximum allowed numerical values.
- **Step**: The amount the value increments or decrements when using the arrow controls.

Paragraph

Used to display a block of text on the form, such as for instructions. This is a display-only field.

- **Content**: The paragraph text to be displayed.

Radio Group

Used to allow a user to select **only one** option from a list.

- **Options**: The list of choices for the user. One option can be pre-selected by enabling the corresponding radio button.

Select Menu

Presents a drop-down list of options. This is ideal for questions with many choices to save screen space.

- **Allow Multiple Selections**: Enable this to allow the user to select more than one option (making it function like a Checkbox Group).
- **Options**: The list of choices for the user.

Text Field

Used to allow a user to input a single line of text.

- **Type**: Specifies the kind of input required (e.g., **Text Field**, **Password**, **Email**, **Tel**).
- **Max Length**: The maximum number of characters allowed.

Text Area

Similar to a Text Field, but provides a larger, multi-line area for text input.

- **Max Length**: The maximum number of characters allowed.
- **Rows**: The initial height of the text area in rows/lines.

Best Practices & Considerations

- **Choose the right selection tool for the job.** Use a **Radio Group** for single-choice questions with few options. Use a **Checkbox Group** for multiple-choice questions. Use a **Select Menu** when you have many options to present in order to save screen space.

- When using a **Text Field**, select the appropriate **Type** (e.g., **Email**, **Tel**). This helps ensure data integrity by validating the input and provides a better user experience by showing a specialized keyboard on mobile devices.
- **Use Header and Paragraph fields to structure your form**.

Forms

> This article describes how to use the Forms module to create, manage, and deploy custom forms for users. This feature allows administrators to collect specific information for processes like applications, appeals, or feedback.

Setup & Configuration

The primary setup step is creating and configuring a new form using the three-tab interface.

This is a refactored module. **Existing form data from older versions of the system is not compatible**, and old forms will need to be recreated using this tool. To view the different options available for form building, please refer to the *Form Field Types* article.

Creating a New Form

1. Go to **User Management**, then hover over **Forms**, and click **List Forms**.
2. On the **Forms List** page, click the **Add Form** button.
3. On the **Form Basics** tab:
   - Enter a **Title** and **Description** for your form.
   - Enable the **Visible** checkbox to make it accessible to users.
   - Set a **Show At** and **Hide At** date and time to schedule the form's availability.
4. On the **Post Form Actions** tab:

- Configure what happens after a user submits the form. You can choose to send a notification email to an administrator by selecting **Mail to specific email**, and you can define the **Completion Text** message that is displayed to the user.

5. On the **Questions** tab:
    - Drag and drop the desired field types from the right-hand panel into the questions area on the left.
    - Click the **edit** icon on each field to configure its options, such as its **Label**, **Help Text**, and whether it is **Required**. For a detailed breakdown of each field type, please refer to the *Form Field Types* article.

Using this Feature

Once forms are created, you can manage them and their submissions from the **Forms List** page.

Managing Forms in the List

From the **Forms List** page, you can perform several actions on existing forms:

- **Edit Form**: Click the pen icon to modify an existing form's settings and questions.
- **View Entries**: Click the **entries** button to view all user submissions for that form. For more details, see the *Managing User Form Entries* article.
- **Copy**: Creates a duplicate of the form structure without its entries.
- **Archive**: Removes the form and all its entries from view.
- **Export**: Downloads the form and all its entry data to an Excel file.

Understanding Question Options

When editing a question field, the following options are available:

- **Required**: Makes the question mandatory for the user to answer before submitting.
- **Searchable**: Allows the answers for this field to be searched on the Form Entries page.
- **Admin Only**: Hides the question from users. It is only visible to adm inistrators when viewing or editing an entry.

Best Practices & Considerations

- **Avoid editing a form after it has collected user entries.** Changes to the form structure can cause existing entry data to display incorrectly. If you need to make changes, **use the Copy function** to create a new version of the form.
- The **Copy** feature is the safest way to update a live form. Create a copy, make your changes to the new version, and then archive the old form once you are ready for users to switch.
- When creating your form you are able to set the start and end times that the form will be available to be seen by your users. **If you want the form to always be available**, make sure to set the **Show At** as the current date and leave the **Hide At** date as blank.