Forms Module

OperationsCommander works hard to maintain an up to date product wiki! If you have any questions or if you feel something is missing, post about it in the community.

- Forms Admin
- Viewing Form Entries
- Form Field Types
- Forms

Forms Admin

> The Forms module allows organizations to create and manage digital forms for special requests and communications with users. Its primary purpose is to streamline data collection and digitize specialized workflows directly within the system. This article is intended for OperationsCommander (OPSCOM) administrators responsible for setting up, configuring, and managing these digital forms.

Setup and Configuration

Administrators must ensure they have the appropriate role permissions assigned before attempting to create or modify forms.

Admin Side: Administrators require specific permissions to access the form builder tools.

1. Hover over **System Configuration**, click **Admin Management**, and click **Manage Roles**.
2. Select the relevant administrator role and click the **Permissions** button.
3. Navigate to the **Users** tab and enable the **Edit Forms** and **View Forms** checkboxes.
4. Click the **Save** button to apply the changes.

> The Forms module has been refactored with new functionality, and new forms are currently only operational on the OPSCOM app. Any existing forms created in the old format are not compatible and must be

> recreated using the new form builder.

Using this Feature

Administrators can use the following instructions to access the module and utilize the available form management tools.

1. Hover over **User Management**, hover over **Forms**, and click **List Forms** to view the complete list of existing forms.

Available Actions and Buttons

Once on the list page, administrators can interact with forms using the following actions:

- **+Add Form**: Click the **+Add Form** button to open the new form builder, allowing you to design and configure your form from scratch.
- **Edit**: Click the **Edit** icon (represented by a pencil icon) next to a form in the list to open the builder and make changes to the layout or questions.
- **Entries**: Click the **Entries** button to view a comprehensive list of all users who have filled out the specific form, along with their submitted information.
- **Copy**: Click the **Copy** button to immediately duplicate a form. The copied version will be added to the bottom of the list.
- **Archive**: Click the **Archive** button to retire a form so it can no longer be used by end-users. All past entries and submitted information will remain saved for historical reference.

- **Export**: Click the **Export** button to download the form data to your device through your browser's download manager in a .xls format (Microsoft Excel Spreadsheet).

Best Practices and Considerations

- **Recreate legacy forms promptly: Remember that existing legacy form data is not compatible with the new format.** You must actively recreate any old forms using the new form builder for them to function correctly on the OPSCOM app.
- **Audit permissions regularly: Regularly review and ensure that the appropriate administrator roles have the necessary permissions.** Confirming that the **Edit Forms** and **View Forms** checkboxes are properly assigned prevents unauthorized modifications to your active forms.
- **Prioritize user-friendly design: Consider the end-user experience on the OPSCOM app when creating new forms.** Keep forms concise and clearly structured with logical questions to ensure ease of use for individuals submitting data from mobile devices.

Viewing Form Entries

> The Viewing Form Entries feature allows administrators to view, search, and manage user submissions for custom digital forms. Its primary purpose is to provide the tools necessary to review submitted data, edit information, and communicate directly with the submitter. This article is intended for OperationsCommander (OPSCOM) administrators responsible for managing form data and processing user requests.

Setup and Configuration

Before you can search for and manage form entries, the foundational forms must be established in the system.

Admin Side: This functionality requires that a digital form has already been created and submitted by users. The specific search options available on the Form Entries page are strictly dependent on which fields were marked as "searchable" during the form's initial setup. Instructions for configuring these field settings can be found in the *Creating New Forms* article.

User Side: End-users submit form entries via the public-facing platform or OPSCOM app, but they cannot view the administrative entry management backend.

Using this Feature

Administrators can use the following instructions to search for specific form submissions and manage them individually from the entry view page.

Searching for Form Entries

1. Hover over **User Management**, hover over **Forms**, and click **List Forms**.
2. Locate the desired form in the list and click the **entries** button.
3. Enter a date range using the **Start date** and **Up to and including** fields on the Form Entry Search page.
4. Select which searchable columns will be displayed in the results list using the **Show in results** multi-select box.
5. Click the **toggle more options** button to filter by specific answers. This reveals text boxes for each searchable field where you can enter a targeted search query.
6. Click the **search** button to generate the list of entries.
7. Click an individual entry from the results list to view its full details.

Working with an Individual Entry

The Entry View page displays the submitter’s information and all of their submitted answers. Administrators can perform the following actions from this page:

- **Viewing and Editing Data:** Administrators can manually edit any of the user's submitted answers or add values to administrative 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 redirected 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 permanently removed by clicking the delete option directly from this page.

> **Visual Cues:** Fields marked as Admin-Only are clearly indicated by a blue border. Hovering your mouse over this border will display a helpful administrative tooltip.

Best Practices and Considerations

- **Maximize search functionality: Use the toggle more options feature for powerful, targeted searches.** For example, you can easily find all submissions where a user answered 'Yes' to a specific question by entering 'Yes' into that specific field's search box.
- **Leverage administrative fields: Remember that Admin-Only Fields are never visible to the end-user.** Use these hidden fields to safely add internal notes, track status updates, or log other administrative data related to the submission without exposing it to the submitter.
- **Edit with caution: Editing a user's form entry permanently changes the data stored in the database.** Always ensure modifications are necessary and accurate before saving changes to a user's original submission, as the original unedited entry will be overwritten.

Form Field Types

> The Form Field Types reference provides a detailed overview of the various field types available when building a custom digital form. Its primary purpose is to help administrators understand the function and configuration options for each individual field, enabling them to create effective and user-friendly forms. This article is intended for OperationsCommander (OPSCOM) administrators responsible for designing and deploying digital forms.

Setup and Configuration

This feature involves utilizing the available building blocks within the form creation tool.

Admin Side: No special system configuration is required to use these form fields. For a complete guide on building a form from scratch, please refer to the *Creating a New Form* article.

Using this Feature

Administrators can utilize the following field types when designing their custom forms. Each field type includes specific configuration options.

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.

> Keep your end-users in mind when designing forms. Leveraging field limitations (like **Max Length** or **Min / Max** dates) proactively prevents data entry errors and saves administrative time later during the review process.

Best Practices and 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 valuable screen space.
- **Ensure data integrity by selecting the appropriate type.** When using a **Text Field**, always select the appropriate **Type** (e.g., **Email**, **Tel**). This helps validate the input and provides a much better user experience by triggering a specialized keyboard on mobile devices.
- **Structure your form clearly. Use Header and Paragraph fields to structure your form.** Breaking up long forms with clear headings and instructional paragraphs improves readability and submission accuracy.

Forms

> The Forms module allows administrators to create, manage, and deploy custom digital forms for end-users. Its primary purpose is to seamlessly collect specific information for organizational processes such as applications, appeals, or feedback. This article is intended for OperationsCommander (OPSCOM) administrators responsible for building and managing digital forms.

Setup and Configuration

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

Admin Side: Administrators build the forms using the administrative interface.

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

User Side: Users do not configure forms but will interact with and submit the published forms based on the availability schedule defined by the administrator.

Using this Feature

Administrators can use the following instructions to navigate the form builder and manage their existing digital forms.

Creating a New Form

1. Hover over **User Management**, hover over **Forms**, and click **List Forms**.
2. Click the **Add Form** button on the Forms List page.
3. Enter a **Title** and **Description** for your form on the **Form Basics** tab.
4. Enable the **Visible** checkbox to make it accessible to users.
5. Set a **Show At** and **Hide At** date and time to schedule the form's exact availability.
6. Navigate to the **Post Form Actions** tab to configure what happens after a user submits the form.
7. Select **Mail to specific email** to automatically send a notification email to an administrator upon submission.
8. Define the **Completion Text** message that will be displayed to the user after they successfully submit the form.
9. Navigate to the **Questions** tab.
10. Drag and drop the desired field types from the right-hand panel into the questions area on the left.
11. Click the **edit** icon on each field to configure its specific options, such as its **Label**, **Help Text**, and whether it is a required field.

Managing Forms in the List

Administrators can perform several actions on existing forms directly from the Forms List page:

- **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 on this process, see the *Viewing Form Entries* article.
- **Copy:** Click the **Copy** button to create an exact duplicate of the form structure without its previous entries.
- **Archive:** Click the **Archive** button to remove the form and all its entries from active view.
- **Export:** Click the **Export** button to download the form and all its entry data to a local Excel file.

Understanding Question Options

When editing an individual question field, the following options are available to refine data collection:

- **Required:** Enable the **Required** checkbox to make the question mandatory for the user to answer before the system accepts the submission.
- **Searchable:** Enable the **Searchable** checkbox to allow the answers for this field to be queried directly on the Form Entries page.
- **Admin Only:** Enable the **Admin Only** checkbox to hide the question from end-users entirely. It is only visible to administrators when viewing or editing an entry.

Best Practices and Considerations

- **Avoid editing a live form: Avoid editing a form after it has collected user entries.** Making changes to the form structure can cause existing entry data to misalign or display incorrectly.
- **Duplicate to update safely: The Copy feature is the safest way to update a live form.** Create a copy, make your necessary changes to the new version, and then archive the old form once you are ready for users to switch to the updated version.
- **Ensure continuous availability: 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 blank.** Providing an end date will automatically restrict access once that time passes.