

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.

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 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.

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Revision #15

Created 30 April 2024 09:28:07

Updated 20 August 2025 08:50:18