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 All past entries and submitted information will remain saved for historical reference.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.

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