

## Form Builder - Custom Form View Configuration

[supportcenter.nc4.com/hc/en-us/articles/218922987-Form-Builder-Custom-Form-View-Configuration](https://supportcenter.nc4.com/hc/en-us/articles/218922987-Form-Builder-Custom-Form-View-Configuration)

The act of creating a custom form causes the system to also generate a Custom Form View Configuration document. This document will display on click of the CF View Configuration listing under the Administration option in your E Team menu.

Users must be a member of the ETeam System Admin or ETeamCustomFormViewConfig group to work with this document.

Each custom form will have 3 views within E Team:

1. Active. Displays all form instances with a status NOT equal to Closed.
2. All (Includes Closed). Displays all active (not deleted) form instances regardless of status.
3. History. Displays each form instance and its' associated history.

Only the first 2 views (*Active* and *All*) can be customized to display selected data fields, and support internationalization. You can also define the location of the form and views within the menu hierarchy using this configuration form.

### Menu/View Configuration

1. **Create** a custom form. The associated view configuration document is created at this time.  
*You can configure the views now or wait until you have published the form. The views will not display to your users until the form is published.*
2. Navigate back to your E Team main screen.
3. In your E Team menu go to *Administration > CF View Configuration > View Configuration*.
4. Your custom form will be listed in the main view frame.
5. Select your custom form listing. The configuration document for that form will open in a new window in read-only mode.
6. Click *Update*.
7. The *Language* field will default to English (United States) when the document is first accessed. Thereafter it will open with the last Language selection made on prior submission. It is recommended that initial configuration be done in English (United States) and submitted before moving on to internationalize your views.
8. In *Top Level Menu* select the menu heading under which the form should be accessed by your users. The form listing will be placed at the bottom of the menu heading selected. By default all published custom forms display under the *Custom Forms* menu option.
9. For each of the delivered *Field Name* values listed:
  - *Use In View?* Disable any field listed that you DO NOT want to include in views. You can NOT disable the two (2) fields that drive the views, custom\_form\_instance\_id and custom\_form\_instance\_status.
  - *View Column Display Label.* Enter the column labels to be displayed in the Active and All (Includes Closed) views for this form. Each column label is associated with one of the seven (7) delivered custom form fields.
  - *Column Wrap.* Enable wrapping for any field where a *Text Area* control was used. This will cause text entered by a user when creating a form instance to wrap in your views. Text area fields used within views must be limited to 250 characters or use a rule to limit view display.
  - *Date Format.* Select the date format to be displayed in the views for this form for the associated field. Date Format should only be set for fields where a *Date* control was used during design. In addition, this setting is for view display only, the date format to be displayed on the form instances is set during the custom form design process.

### Configuration Example:

**Custom Forms View Configuration**

\*Red Label indicates a required field.

**Basic Info**

Form Name  
Volunteer Check In

Published Date/Time  
03/08/2012 at 17:45 PST

Top Level Menu  
Disaster Relief

Language  
English (United States)

Field Name	Use In View?	View Column Display Label	Column Wrap	Date Format
custom_form_instance_id	Enable	Name		
custom_form_instance_status	Enable	Status		
custom_form_v1	Enable	Assignment	Disable	Disable
custom_form_v2	Enable	Location	Disable	Disable
custom_form_v3	Disable	Secondary Language	Disable	Disable
custom_form_v4	Disable	Team	Disable	Disable
custom_form_v5	Enable	Check In Date	Disable	MM/dd/yyyy

10. When finished *Submit* the configuration document.
11. You MUST log out of and back into E Team to view your configuration. The Custom Forms menu is not built on the fly so changes made in the View Configuration document only take effect as the systems builds your menu at next login.
12. From the menu select and expand the heading under which you placed the form.

13. Select the *Active* view associated with this form to verify your configuration results.

For the configuration example above, the form would be located under *Disaster Relief* and the view would look like this:

Volunteer Check In Active Expand All Collapse All

Create Delete Print Auto Refresh ☐ On ☐ Off This screen last updated (00:00:00:15)

Name	Status	Assignment	Location	Check In Date	Date Created	Date Modified
Mary Smith	open	CVUSD Elementary Schools	CVUSD	Not Reported	03/08/2012 at 18:01 PST	03/08/2012 at 18:01 PST

You can update your view configuration at anytime. Logged in users will not see changes to view configuration until they have logged out and back into E Team.

### Internationalizing a Custom Form View

If your organization is using a second language within E Team and have [internationalized your form design](#)(s), you will also want to internationalize the associated views within E Team.

1. Complete the initial view configuration in English following the instructions above.
2. Select and place the view configuration document in update mode.
3. In the *Languages* drop down, select the supported language you are using. Once you select the new language the existing English language inputs in the *View Column Display Label* fields made previously for English will clear. This data is not lost and will display again when English is selected again in this field.
4. In the *View Column Display Label* fields enter the text to be displayed in the views in the language selected for each of the default custom form fields enabled. All other settings remain the same for all languages.
5. When done click *Submit*.

To view results your system and browser language settings must match the language selected for this configuration. You must log out and back into E Team.

### Removing Custom Forms Views From the Menu

When you [unpublish](#) a custom form you will want to also remove the associated views from your E Team menu. To do this *Delete* the form's *View Configuration* document. This does NOT delete form instances. All active (not deleted) form instances are retained in the system and can continue to be viewed using the set of *All Custom Forms* views.

If you delete a *View Configuration* document by mistake, you can restore the configuration document and in turn the associated set of views.

### Restoring Custom Form Views

1. In your E Team menu go to *Administration > CF View Configuration > History*.
2. Expand the view listings.
3. Locate the View Configuration document to be restored.
4. Select the link to the listing containing the deleted data. This document should be the top listing for the view configuration document associated with the form, and contain information for Deleted At and Deleted By.

**History**

Print

<input type="checkbox"/>	Form Name	Updated At	Updated By	Deleted At	Deleted By
<input type="checkbox"/>		<a href="#">04/20/2016 at 12:43 PDT</a>	csalomon	04/21/2016 at 09:21 PDT	csalomon
<input type="checkbox"/>		<a href="#">04/20/2016 at 12:43 PDT</a>	csalomon		

5. Click the link to open the document.
6. Click the *Restore* button at the top of the document.
7. Close the confirmation dialog.
8. Return to the main View Configuration view.
  - The view configuration listing will again display in this view.
  - Log out and back in to see the related custom form views in your E Team Menu. All form instances will again be visible within these views.