

Form Builder - Creating a Custom Control

supportcenter.nc4.com/hc/en-us/articles/218366988-Form-Builder-Creating-a-Custom-Control

Custom Controls allow you to reuse a field or set of fields that are created for one form, then dropped onto the form builder's Custom panel, on any number of forms. Once published, custom controls are available for immediate use in both Operations and Training, they do not need to be created twice.

Creating a Custom Control


1. Navigate to Administration > Form Builder to launch Form Builder Manager
2. Click *Create Tab*.
3. Give your document a name and click *Next*.
4. Drag and drop a *Section* control from the Palette onto your workspace.
Section is used when adding multiple fields. You can also drop a single field onto the workspace and generate a custom control. A good example of a single field would be a reusable drop down, radio button, or checkboxes, where all forms using the control require same input options by your users.
5. Drag and drop Palette controls into the *Section* added to your workspace.
6. When done, drag the section or field over to the *Custom* panel header bar.
7. When you see the *Green Arrows*, you can drop your control.
8. In the *Publish Control Template* window:
 - Verify or alter your *Template Name* as needed.
 - Add *Tags*. Examples: Version No, Organization acronym, quick text to help identify use, etc. Tags display within the Custom listing after your control is published.
 - You can leave *Categories* empty.
 - Enter any *Description* you wish.
 - Check *Yes* if you wish to make this control read-only to prevent changes.
Selecting Yes prevents updating of this control once published. Contact support@nc4.com to get help up updating a read-only control.
 - When done click *Submit*.
 - Close the publishing confirmation window. Your control will be listed alphabetically in the listing presented.

You can click Cancel at anytime to close this window without saving your work. It is not necessary to retain this tab once the control has been published. If you have saved during the course of creating the control you can delete the tab used from within the Form Builder Manager main screen.

Adding Your Custom Control to Forms

1. Launch Form Builder.
2. Place an existing form in *Update* or *Create* a new form or tab.
3. Expand the *Custom* panel and locate the control to be edited.
4. Drag and drop the control onto the form.
5. Complete your work on the form/tab and save in the usual manner.


Deleting Your Custom Control

1. Launch Form Builder.
2. Place an existing form in *Update* or *Create* a new form or tab.
3. Expand the *Custom* panel and locate the control to be deleted.
4. Click on the  to the right of the listing
5. The control is removed from the *Custom* panel.
The control will remain on any form to which it has previously been added. To remove the control from existing form designs, you MUST update each form and delete the control manually from those form designs.

DO NOT DELETE E TEAM GENERATED CUSTOM CONTROLS TAGGED NC4

Editing Your Custom Control

1. Launch Form Builder.
2. Create a new tab.
3. Drag and drop the existing custom control onto your workspace.
4. Make changes as needed.
5. When done drag, drop and publish the updated control.

6. Delete the old control by clicking on the  to the right of the listing.

Changes made to a custom control are not reflected on existing forms where already in use. If you wish changes to be reflected on existing form designs, you must update each form design, delete the old custom control, and drag and drop the new one into place.

Searching for Your Custom Control

If you do not see your previously published custom control when expanding the *Custom* panel, click *Search*. Use the options presented to locate your control. Check the box to the left of the control and click *Finish* to add it into the visible listings for use.