

## Form Builder - Creating/Updating Tabs

[supportcenter.nc4.com/hc/en-us/articles/218361978-Form-Builder-Creating-Updating-Tabs](https://supportcenter.nc4.com/hc/en-us/articles/218361978-Form-Builder-Creating-Updating-Tabs)

E Team's Form Builder gives you the ability to create tabs and populate with controls. These tabs can then published to E Team core forms. The tab create option is also used when [creating custom controls](#).

### Creating Tabs

1. Navigate to Administration > Form Builder to launch Form Builder Manager.
2. In Form Builder Manager window click Create Tab.
3. In the window that displays:

4. Enter a Form Name. This is the name saved in the system by which the design will be identified. You may NOT repeat form names. If you enter an existing form name, you will be prompted to change the name on click of *Next* at the top of this form.
5. Enter a Display Name. This is the text that will display on the tab seen by E Team users once published to E Team. Tab display names do not have to be unique.
6. Enter a Description for this tab as needed. Data entered here does not display on the tab. It is visible here and in the form *Properties* Description field.
7. All remaining fields on this form are system generated.
  - Status
    - Work In Progress - Displays on create and remains until such time as the form is published
    - Published - Displays once a form has been successfully published.
    - Unpublished - Displays once a previously form has been unpublished from "ALL" E Team form(s) to which it had been published.
  - Created posts the current date/time.
  - Created By posts the current user's name as it appears on their Profile document.
  - Last Update post the current date/time and will be automatically updated each time the form design is saved.
  - Updated By posts the name of the user saving the form design as last saved on their Profile document.
  - Last Published will post the date/time the tab was last published
  - Published by will post the name of the user taking the last action to publish the tab.
8. When done click *Next* to save your tab and launch the [Form Designer Workspace](#). *Your tab is saved on click of Next. If you click Cancel once on the workspace window your tab will still be listed in Form Manager.*
9. The Form Name given above is visible at the top of the main workspace and, along with the Description, in the *Properties* panel on the left.
10. Drag and drop controls from the *Palette* onto your workspace.
11. Change each controls [Properties](#) as needed.
12. When done click *Finish*.

You can now [Publish](#) your tab.

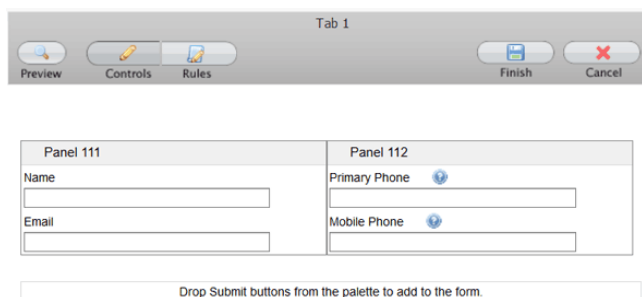
To see what a completed tab might look like, check out our example exercise below.

### Example

Follow the steps above to create a new tab with the *Form Name* Tab 1 and the *Display Name* Contact Information to open your designer workspace.

1. Drag and drop a *Panel* control onto your workspace.
  2. Drag and drop a second *Panel* control onto your workspace to create 2 columns.
  3. Drag and drop a *Text* control into the panel on the left. Change the *Properties Label* to Name. This will also populate the *Properties Name*.
  4. Drag and drop an *Email* control into this same panel below the *Text* control. Change the *Properties Label* to Email. This will also populate the *Properties Name*.
  5. Drag and drop a *Phone* control into the panel on the right. Change the *Properties Label* to Primary Phone.
  6. Drag and drop another *Phone* control below the first. Change the *Properties Label* to Mobile Phone.
- For both steps 5 and 6 the *Properties Name* is populated, dropping the space between the 2 words. In addition a default *Error Msg* and user *Help* text is added for you.

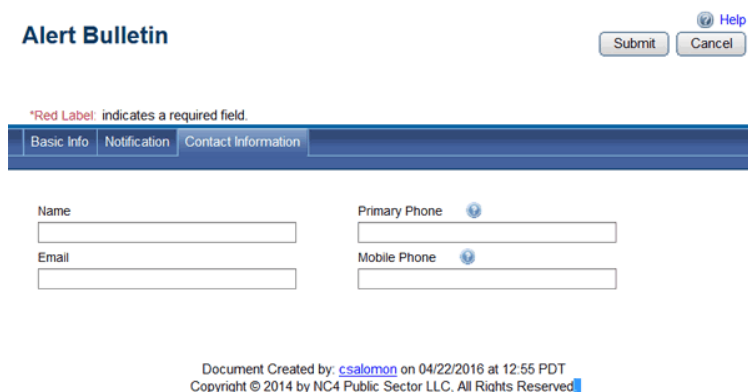
Your workspace will now look like this:



7. Click *Finish* when done to save all changes.

If you click *Cancel* at anytime prior to clicking *Finish*, no changes will be saved. The tab will still be listed on the Manager's screen.

Once your the tab is [published](#) to an E Team form, it would look like this when accessing the core form.



### Updating a Tab Design

1. Locate the tab in the Form Builder Manager *Active* view.
2. Click on the associated image in the *Update* column to the right of the tab listing to open the tab's identity page.
3. Update *Display Name* and *Description* fields as needed and click *Next*.
4. The designer workspace for the tab is displayed.
5. Update the tab design as needed, when done click *Finish*.

Changed made to a already published tab will display to users when creating a new form instance, or when placing an existing form instance in update mode for the first time, which triggers reading of the design template for the tab. Once an existing instance is submitted, the tab design changes will also display in read and print modes of the form instance.

### Previewing Your Tab

1. Locate the tab in the Form Builder Manager *Active* view.
2. Click on the associated image in the *Preview* column to the right of the listing.
3. The preview window opens displaying the body of the tab as it will appear to your users. From this window you can then:
  - Click *Update* to access the designer workspace to make changes.
  - Click *Close* to close the preview window and return to the Form Builder Manager main screen.

- Click *View XSD* or *Sample Data* as needed to open the selected option in notepad.