

Form Builder - Creating/Updating Forms

supportcenter.nc4.com/hc/en-us/articles/218885187-Form-BUILDER-Creating-Updating-Forms

E Team's Form Builder provides the means by which to add both simple and complex forms to use within E Team. Please contact support@nc4.com if you require assistance with form design.

Creating a New Form

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

Custom Form

*Red LabelIndicates a required field.

* Form Name

* Display Name

Description

| | |
|----------------|-------------------------|
| Status | Work In Progress |
| Created | 04/21/2016 at 19:56 GMT |
| Created By | Cathi Salomon |
| Last Update | 04/21/2016 at 19:56 GMT |
| Updated By | Cathi Salomon |
| Last Published | |
| Published By | |

- 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.
 - Enter a *Display Name*. This is the text that will display on the form and identify the form within views once published to E Team. Form display names should not be repeated to best support ease of use within E Team.
 - Enter a *Description* for this form as needed. Data entered here does not display on the form. It is visible here and in the form *Properties* Description field.
 - 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 - Unpublished - Displays once a previously form has been unpublished.
 - 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 form was last published.
 - Published by will post the name of the user taking the last action to publish the form.
4. When done click *Next* to save your form and launch the [Form Designer Workspace](#). *Your form is saved on click of Next. If you click Cancel once on the workspace window your form will still be listed in Form Manager.*
 - 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.
 - Your workspace includes predefined fields within a [Custom Form Identity](#) section that are used by E Team to properly display the form and associated views when published. Use of these fields is documented below.
 - Your workspace includes a section labeled *Required Hidden Fields DO NOT EDIT*. These fields are required by the system. *DO NOT REMOVE this section or alter it in anyway, doing so will prevent the form from being used in E Team. These fields do not display when the form is published in E Team.*
 - Under *Properties* > *Style* on the left there is a field labeled *Theme*. By default all forms created in E Team use the predefined *ETeam Theme*. This theme ensures custom forms have the same overall look feel of core E Team forms. *DO NOT change this theme*. If you have a need for a customized theme, contact support@nc4.com. This theme value will not display by default, if you are not sure whether your form conforms to the ETeam Theme you can select it here to verify.

The Required Hidden Fields and ETeam Theme plugs in our form header, controls (Update, Submit, Delete, Print), and supports proper data capture to post in our form footer (Created by/at, Updated by/at) and ensures that all instances created can be properly retained in E Team history, and included in auto-closure and archive processing.

5. Edit the [Custom Form Identity](#) fields as needed.
6. Drag and drop controls from the Palette onto your workspace and change each controls [Properties](#) as needed.
7. When done click *Finish*.

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

To see what a completed form might look like, check out our [example exercise](#).

Custom Form Identity

- `custom_form_instance_id` is used as the document link in E Team views once published. You may change the field label, control type and location of this field, but do NOT alter the field name `custom_form_instance_id`. This field should be used for information that is unique to a document instance created using the form so that it can be easily selected from a view. Example: Facility Name, Request No, Last Name, etc.
- `custom_form_instance_status` is used to determine whether the document instance should be displayed in the "Active" or "All-Includes Closed" views once published. This field is delivered with values of Open and Closed, with the default being Open. The field label and location can be changed, however, do NOT change the field control type, it must remain a dropdown and do NOT change the field name `custom_form_instance_status`. You may add additional values to this field but at least one value MUST be "Closed."
- `custom_form_v1`, `custom_form_v2`, `custom_form_v3`, `custom_form_v4`, and `custom_form_v5` are used to define additional report data to display in the E Team views. You may change the field labels, control type, and location but do NOT change the field names. If the system does not allow for a change of control type you can delete and drag a new control of the correct type onto the form and give it the name of the delivered control just deleted. These 5 fields are used within the [Custom Form View Configuration](#) document providing you the means by which to configure your E Team views for the associated custom form. `custom_form_v4` and `custom_form_v5` can be set up as Text Area controls and data entered and displayed in the E Team views can be configured to wrap within the associated view column, the data entry character limit on each of these fields is 4000, so when changing to a text area you may want to add this information to field level help. In addition, within views, these fields are truncated at 200 characters for display purposes. The following [custom form rule](#) should be used to avoid errors when more than 200 characters are entered in these fields. Replace the bolded value to reflect the proper field.

```
if(form.unload){ if(custom_form_v4.value.length > 200){ var txt = custom_form_v4.value.substring(0,200); custom_form_v1.value=txt; } }
```

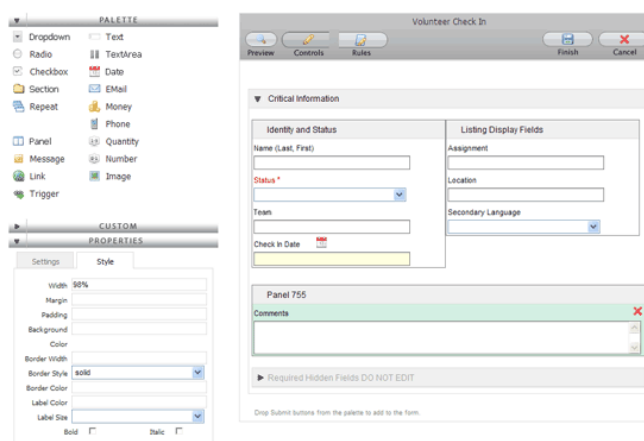
Advanced users can chose to manage this default identify section of forms using a field mapping rule. This is helpful when using reporting tools and making changes to the form design over time.

Example Exercise

Follow the steps above to [create a new form](#) with the name *Volunteer Check In* to open your designer workspace.

1. Click the *Custom Form Identity* header and change the *Properties Label* to Critical Information.
2. Click on the `custom_form_v1` control and change the *Properties Label* to Assignment.
3. Click on the `custom_form_v2` control and change the *Properties Label* to Location.
4. Click on the `custom_form_v3` control and click the red X to delete the control.
5. Drag and drop a Dropdown control from the pallet onto the form to replace the deleted control, and change the *Properties Name* to `custom_form_v3` and the *Properties Label* to Secondary Language.
6. Drag `custom_form_v4` below the *Status* field and drop it into this new position and change the *Properties Label* to Team.
7. Delete `custom_form_v5` and drag a Date control from the pallet onto the form and position it below the newly labeled Team field. Change the *Properties Name* to `custom_form_v5` and the *Properties Label* to Check In Date.
8. Drag and drop a Panel control onto the workspace below the newly labeled *Critical Information Section*. Under *Properties > Style* change *Width* to 99%. There is no requirement to change the panel label it will not display on the form.
9. Drag and drop a *TextArea* control into the new *Panel*. Change the *Properties Label* to Comments.

Your workspace will now look like this:



10. Click on *Preview* at the top of the workspace to see what your form fields will look like once published and accessed from E Team views. You will not see the E Team form title, controls, or footer at this time.

11. Click *Finish* to save your form. The workspace will close and your focus will be back on Form Builder Manager's main screen. If you click *Cancel* at anytime prior to clicking *Finish*, no changes will be saved. The form will still be listed on the Manager's screen.

Once your the form is **published** it would look like this when accessed from within E Team.

Volunteer Check In

*Red Label: indicates a required field.

Submit Cancel

▼ Critical Information

| | |
|--------------------|--------------------|
| Name (Last, First) | Assignment |
| Status * | Location |
| Team | Secondary Language |
| Check in Date | |
| Comments | |

Updating a Form Design

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

Changes made to an already published form 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 form. Once an existing instance is submitted, the form design changes will also display in read and print modes of the form instance.

Previewing Your Form

1. Locate the form 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 form 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.