

Form Builder - Replacing Existing Forms/Tabs

 supportcenter.nc4.com/hc/en-us/articles/218885437-Form-BUILDER-Replacing-Existing-Forms-Tabs

The custom forms replacement feature provides the means by which to update an existing form design, for example, while working in your Training database, test system, etc., and replace the form as needed in all other E Team databases/servers where it is being used.

For example, you created a form while working in your E Team Training side. You then exported the design from Training and imported it into E Team Operations. Later you make changes to update the form design, again working on the Training side. You want these changes to be applicable to the form in Operations as well. To do this would want to use the *Replace* option on the form in Operations.

1. Using the example above, you must first **export** the form from E Team Training.
2. Once you have the form saved to your local drive, in E Team Operations (or another designated E Team system) navigate to *Administration > Form Builder*.
3. Locate the form or tab in the Form Builder Manager *Active* view.
4. Click on the associated image in the *Replace* column to the right of the listing.
5. The Replacement window opens, displaying the *Form Name*, *Display Name* and *Description* of the selected form/tab.
6. Browse to and select the form design .zip file on your local drive.
7. When ready click *Replace*.
 - The system replaces the existing form design with the newly uploaded design, retaining the design ID.
 - The Replacement window closes and returns you to the Form Builder Manager main screen.

To verify, open the form in preview.

If previously published, the form/tab does NOT need not be republished, however, depending on your changes, you may need to adjust the view configuration and/or report design associated with the form.

As with any change made on a custom design, users will not see changes within E Team until such time as they place an existing instance of the form in update mode, or create a new form instance, which triggers reading of the design template for the form/tab.