

Form Builder - Introduction and Overview

 supportcenter.nc4.com/hc/en-us/articles/218344428-Form-BUILDER-Introduction-and-Overview

You must be a member of the ETeam System Admin or ETeam FormBuilderAccess group to have the ability to select the Form Builder option listed under Administration on your E Team menu. Selecting this option launches a new window containing the E Team Form Builder Manager. Users can work in both Form Builder and E Team in a single session without having to close either window.

Form Builder Manager is available in both Operations and Training and forms must be managed as needed in each. If the user is logged into Operations then Form Builder Manager will be identified as Operations and all activities during that session will be against Operations. Forms used in both operations and training can be created/updated in either and may be exported and imported into the other.

From the Form Builder Manager the user will have the ability to:

- Create a new form or tab.
- Import new custom forms and tabs.
- Export custom forms and tabs.
- Configure status colors for display in views and customize icons for display on map viewer for a custom form.
- Preview an existing form or tab.
- Update an existing form or tab.
- Internationalize an existing form or tab.
- Define a form design as *Static* to determine handling during the auto closure and archiving processes.
- Delete an existing form or tab from the active view.
- Reactivate deleted form or tab, returning it to the active view.
- Clone custom forms and tabs.
- Replace existing custom forms and tabs.
- Publish/Unpublish an existing form or tab. The act of publishing a custom form also causes the system to generate a Custom Forms View Configuration document for that form.
- Review status of an existing form or tab.
- View online Help for the Form Builder Manager by selecting the Help option at the top of the Form Builder Manager window.
- Exit Form Builder Manager while retaining E Team login by selecting the Close option at the top of the Form Builder Manager window. *Access to Form Builder Manager is only through a valid E Team User ID. Therefore, users may close Form Builder Manager without logging out of E Team, however, logging out of E Team also logs the user out of Form Builder Manager.*