Form Builder & Form Creation

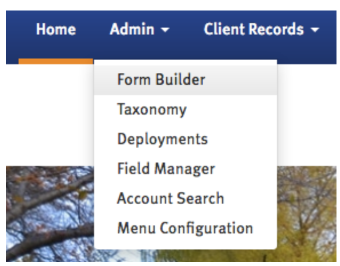
Form Builder is a tool designed to allow the creation of custom, and flexible intake forms. Forms can be designed in multiple formats, and can be customized to fit the needs and workflow of an organization collecting information, providing referrals and tracking client outcomes. The Form Builder tool is typically only accessible to System Administrators, but roles can be created or adjusted to allow a wider range of users access to this tool.

The CommunityOS^2 system is divided into different areas referred to as "Features". By default, the available Features within the system are Account, Chat, Client, Content, Results Format, Resource and Roles. Each feature will have its own individual set of forms, and Form Builder is the tool that will allow you to create, and edit forms within each Feature.

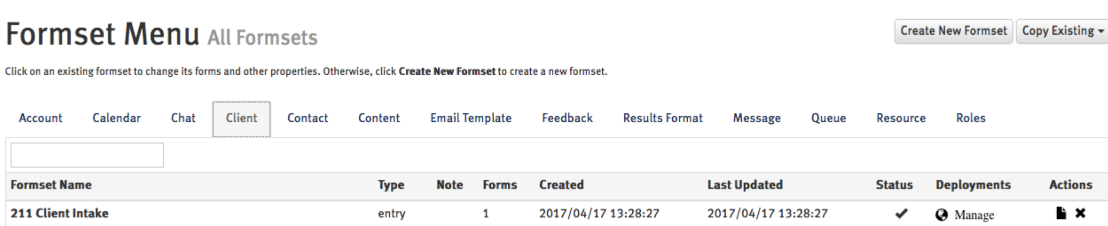
Creating a New Formset

A new entry, or search form can be created by following the steps below.

1. Once logged in, a System Administrator can click on the Admin item in the system menu and click Form Builder in the list of items within the Admin menu. Alternatively, an administrator could click Admin in the system menu, and access Form Builder from the Admin page.

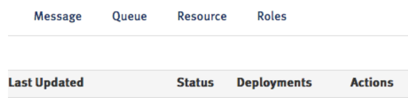


2. After clicking on, and navigating to Form Builder you should see "Formset Menu" in large text in the upper left side of the page, and a line of tabs indicating each available Feature where a Formset can be created. Click on the desired Feature to view a list of the existing forms within that feature.

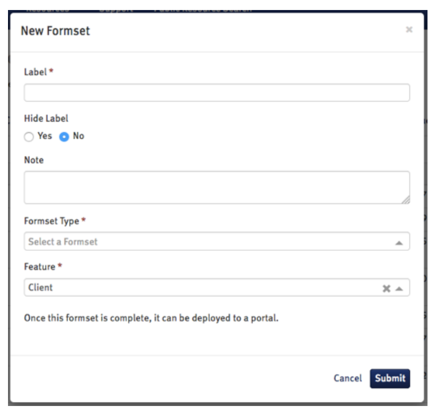


3. Now that you have clicked the Feature where you would like to create a new Formset click the "Create New Formset" button in the upper left corner of the

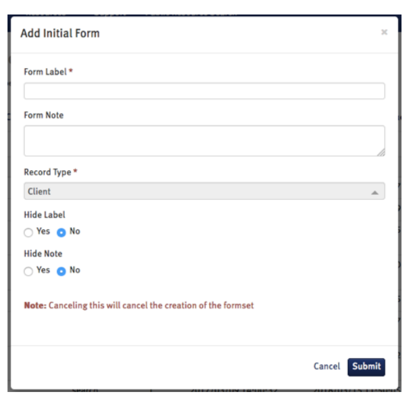
page. There are two other buttons labeled "Copy Existing" and "Import" but we will skip them for now and touch on them a bit later.



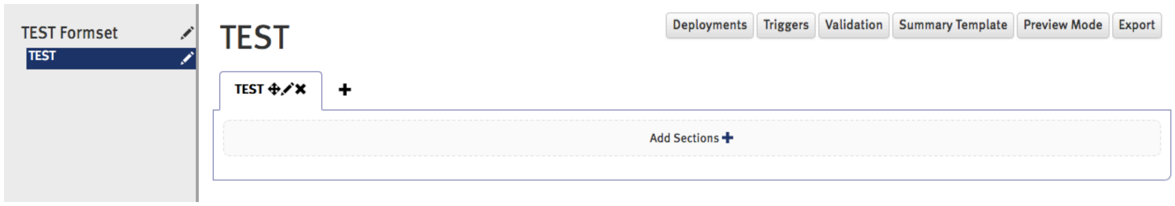
4. After clicking the "Create New Formset" button a modal should display and ask you to enter a Label, and select a Formset Type. The available Formset Types are Entry, Search and export. From here you will also have the option to enter a Note and hide the label for your new Formset. All the Formset options within this modal can be changed after the Formset has been created EXCEPT for Formset Type. Once the Label and Type have been entered click the Submit button to continue.



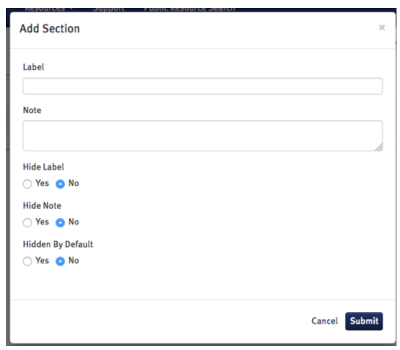
5. After clicking Submit, you will be prompted with another modal to enter information about the initial form, or tab within your new Formset. Enter a Form Label, Form Note (optional) and click Submit to continue.



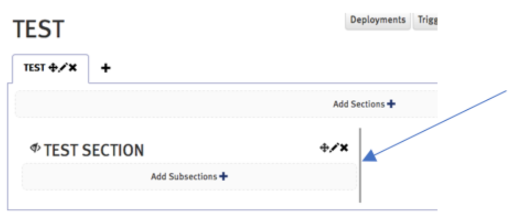
6. You should now be viewing a blank Formset. The Form Label you entered should be displayed at the top of the page, and you should be able to click "Add Section +" to begin the building process. Click "Add Section +".



7. You should now see a modal labeled “Add Section” and asked to enter a Label, Note (optional) and have the ability to control section properties using radio buttons. I will outline the different section properties later in this section. After entering a Label, click Submit.



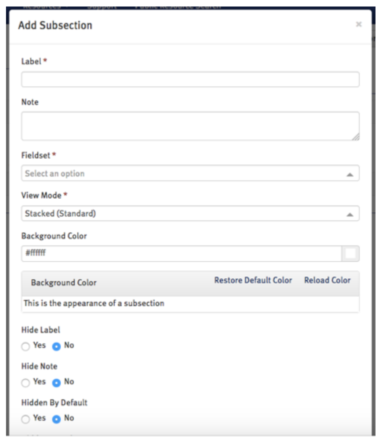
8. After clicking submit in the previous step your section should be added to the form with the Label visible. By default, the section will cover half of the form, but you can click and drag the grey line on the right side of the section to resize it to the desired width.



9. Located to the right of the section label are 3 icons. These icons appear as a set of 4 arrows, a pencil, and an X. Clicking and holding on the arrows allows you to drag and change the placement of the section, the pencil will allow you to edit the section properties (I will outline these properties later in this section), and lastly the X will allow you to delete or remove the section from the Formset.

10. Located directly below the section label is a button labeled "Add Subsection +". Click the "Add Subsection +" button to add a subsection to the section you created.

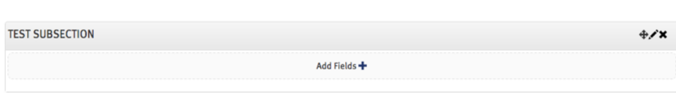
11. After clicking "Add Subsection +" you will be prompted with a modal labeled "Add Subsection". This modal will ask you to enter a Label, Note (optional) and select a Fieldset. The available Fieldsets are Client, Interaction, Health and Shelter. The Add Subsection modal will also allow you to control the subsection color, as well as the subsection properties (which I will outline later in this section). Enter a Label, select a Fieldset and click Submit.

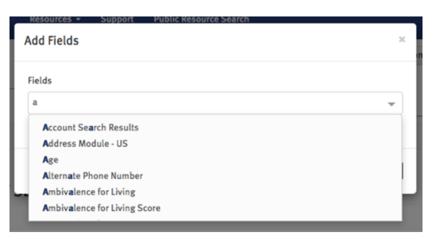


12. After clicking Submit in the previous step your subsection should be added to the Section you created. The subsection will always be the same width as the section, and will respond to size adjustments controlled with the grey bar on the right side of the section.

13. Located to the right of the subsection label you will see 3 icons. These icons should appear as a set of 4 arrows, a pencil, and an X. Clicking and holding on the arrows will allow you to drag and change the placement of the subsection (Please note that a subsection can only be moved within the same section it was created within), clicking the pencil will allow you to edit the subsection properties and lastly the X will allow you to delete or remove the subsection from the Formset.

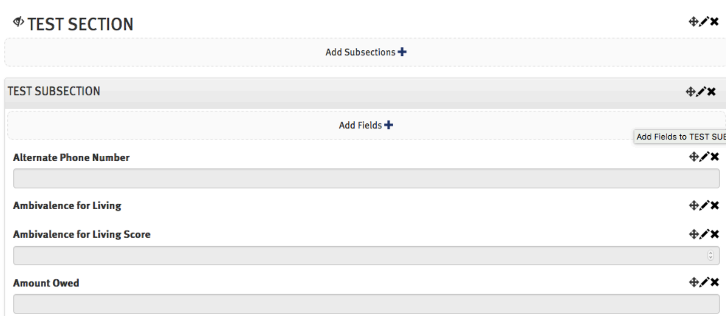
14. Located within the newly created subsection should be a button labeled "Add Fields +". Click on this button to open the "Add Fields" modal.





15. Click on "Select Fields" to view a list of fields that are available to be added to the subsection. Please keep in mind that a field can only be added to a Formset once; so if a field has already been added to the form, it will not appear in the list of available fields. This list also supports multi-select functionality, so you can select multiple fields to be added at once. Once you have selected the fields you want to add to the subsection click Submit.

16. After clicking Submit, you should now see the fields you selected within your subsection on the form. Each field will have the same 3 icons displayed on the Section an Subsection located to the right of the field label. The arrows will allow you to rearrange the fields within the Subsection (Please note that a field can only be moved or rearranged within the subsection it was added to, and cannot be moved to a different subsection), the pencil will allow you to edit the field properties which I will outline below and the X will allow you to remove the field from the subsection and form.

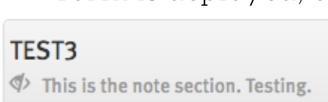


Section Properties

- Hide Label – Enabling this will cause the section label to be hidden when the form is deployed, or in Preview Mode.

(THIS ICON INDICATES A SECTION OR SUBSECTION IS HIDDEN) 

- Hide Note – Enabling this will cause the section note to be hidden when the form is deployed, or in Preview Mode.



(THE HIDDEN ICON IS PRESENT, SO THE NOTE WILL NOT SHOW UNLESS IN EDIT MODE)

- Hidden by Default – Enabling this will cause the section, and all of its contents to be hidden until triggered.

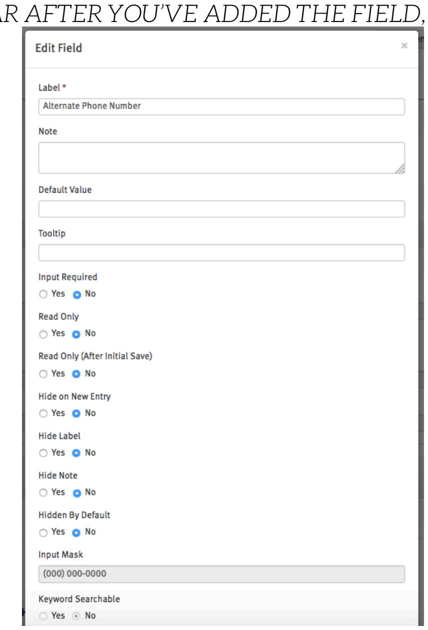
(THE TEXT "HIDDEN BY DEFAULT" WILL APPEAR WHEN A SECTION OR SUBSECTION IS HIDDEN)

Subsection Properties

- Hide Label – Enabling this will cause the subsection label to be hidden when the form is deployed, or in Preview Mode.
- Hide Note – Enabling this will cause the subsection note to be hidden when the form is deployed, or in Preview Mode.
- Hidden by Default – Enabling this will cause the subsection, and all of its contents to be hidden until triggered.
- Hidden by Role – Enabling this will allow you to restrict the visibility of a subsection and its contents to users with a specific role. For example, if you enable this function, and set Role 1 on this subsection, only users with Role 1 on their account will be able to view this subsection and its contents.

Field Properties

(FIELD PROPERTIES APPEAR AFTER YOU'VE ADDED THE FIELD, BY CLICKING THE EDIT FIELD ICON)



- Input Required – Enabling this will force a user to complete this field before the form can be submitted.
- Read Only – Enabling this will prevent a user from editing the field or its contents, allowing only viewing access.
- Hide Label - Enabling this will cause the field label to be hidden when the form is deployed, or in Preview Mode.
- Hide Note – Enabling this will cause the field note to be hidden when the form is deployed, or in Preview Mode.

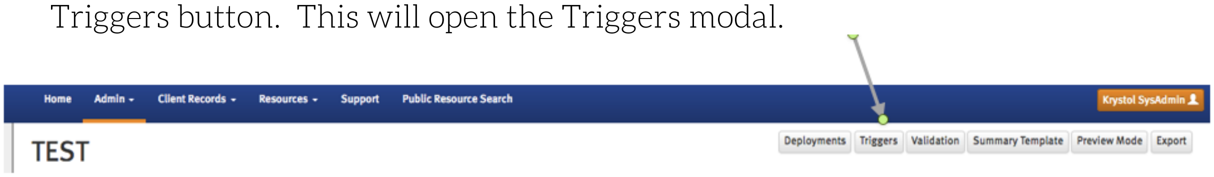
- Hidden by Default – Enabling this will cause the field to be hidden until triggered.
- Force Unique – Enabling Force Unique will prevent a single value from being submitted in a field more than once. Keep in mind this applies to more than one client. This would be useful for something like SSN. For example, if you create a client record with the phone number (111) 222-3333, and have the Force Unique setting enabled on the phone number field, you will never be able to submit another record with that same phone number since it has already been used, and would no longer be unique.
- Primary Criteria – The Primary Criteria setting is more for developer use. It allows a field that is unique to be used to select a record via a URL. It is useful for the import process because it allows VisionLink to preserve a records old ID number in the new system.

Form Builder – Trigger Creation & Implementation

Triggers provide a clean, and flexible way to display fields, subsections, sections and tabs based on the information provided by a caller during the intake process. Using triggers will allow you to only display select fields, subsections, sections or tabs based on a rule, or condition set by a system administrator. Triggers can be added, or removed from a form at any time by a system administrator. I will outline the process and requirements to create a trigger below.

1. In order to create a functioning trigger the item you wish to trigger MUST be Hidden by Default. Open the properties for the item you wish to trigger, and enable the Hidden by Default setting.

2. Once your item to be triggered is hidden, and you have determined the condition that will trigger this item scroll to the top of the page and click on the Triggers button. This will open the Triggers modal.



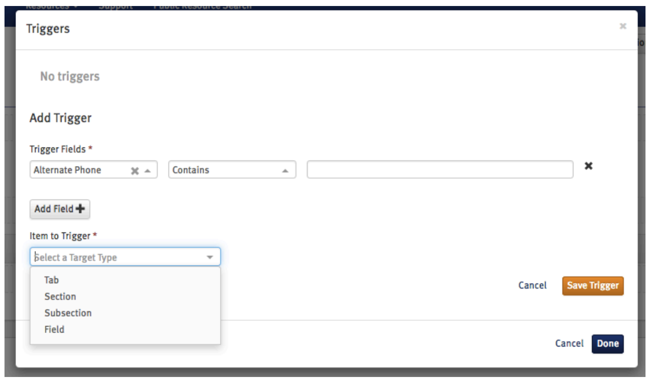
3. Within the Triggers modal click the button labeled "Add Trigger +". This will expand the modal, and display the fields needed to begin setting up a new Trigger.

4. First, you will need to select a Trigger Field. Click to expand the list of available fields. Keep in mind that this field does support type ahead functionality to

filter the available options based on the text that is entered. Select your field, and set the desired condition that will need to be met to trigger the hidden item.

5. Next, you will need to select the Item to Trigger. Click on the first field, and select the item type you want to trigger. This list will include Tab, Section, Subsection and Field.

6. Now that you have selected the item type, you can select your item in the drop-down menu that appears on the left side. This field also supports type ahead functionality and will filter the available options based on any text that is entered.



7. Once the Trigger Field, and Item to Trigger have been selected click the Save Trigger button. The modal should collapse slightly, and you should be able to see a summary of the trigger you just created.

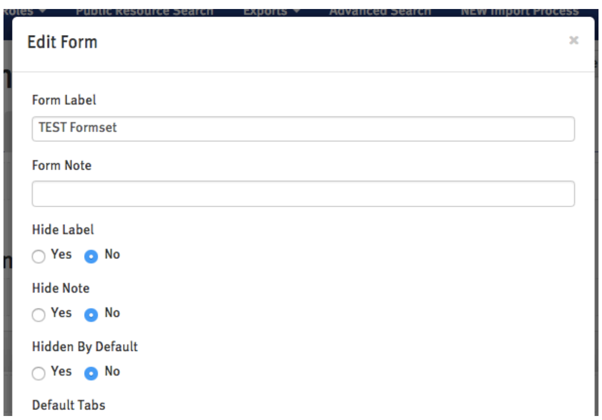
8. Click the Done button to close out of the Trigger creation modal.

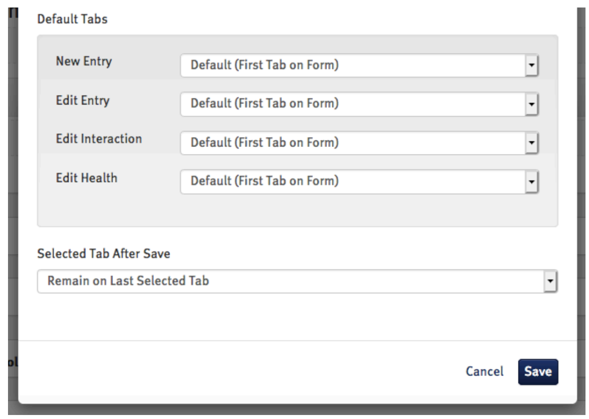
You can check to ensure the trigger was successfully created by clicking on the Preview Mode button located on the top right side of the Form Builder page. Preview Mode will allow you to view the form in its deployed state without having to create a deployment. Also, please note that trigger fields will be marked with a gear or cog icon when viewing a form in preview mode, or a live "deployed" form.

Additional Form Settings

You have the option of adding multiple tabs to a single form. If you wish to add a new tab, simply click on the plus sign to the right of the first tab which was created by default. Give the tab a name, and use the new tab however you wish, adding new sections, subsections, fields, and triggers. If you add additional tabs, you will have other settings to add more control and customization.

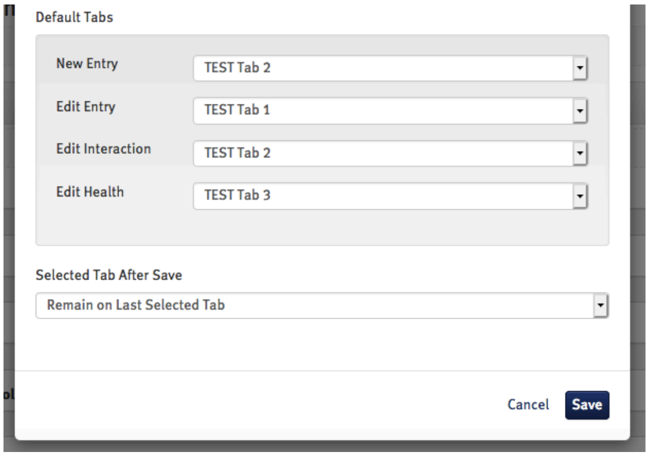
When adding multiple tabs, you are given another optional feature available. The first tab added is added by default, and is considered the "default tab". Additional setting options are available by going to Edit Form. Click on the pencil icon to edit. The Edit Form modal will open, with settings called Default Tabs.

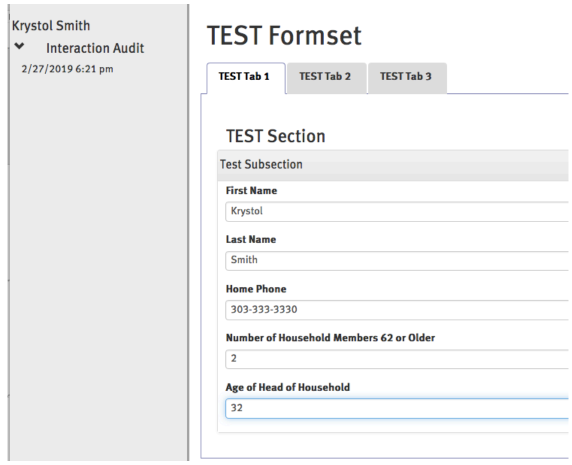




Default Tabs allows you to determine which tab to load by default when creating a new entry, editing an entry, and when you are editing each snapshot fieldset.

In the screenshot below, you can see upon New Entry you will be automatically directed to TEST Tab 2. Add information into TEST Tab 2, click Save. You are then redirected to TEST Tab 1 and you can see your entry record started on the left. Then add information to TEST Tab 1 as needed and Save. Additionally, if you were to edit an existing entry, you would be directed to TEST Tab 1. If you were to edit an existing Interaction you would be directed to TEST Tab 2, and if editing an existing Health record you would be directed to TEST Tab 3.





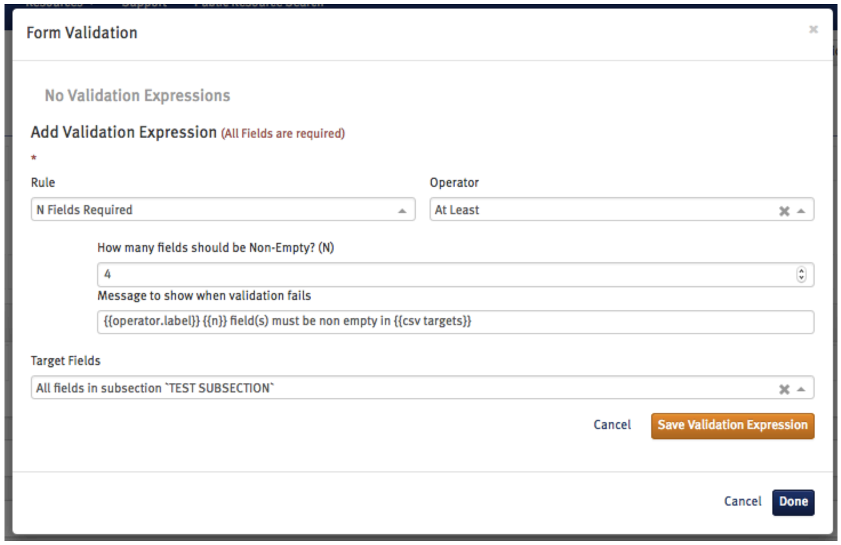
There is an additional setting called "Selected Tab After Save" on the form modal that allows you to select the default tab behavior after save. There are 2 options under this setting: "Remain on Selected Tab" and "Select Default Tab".

- "Remain on Selected Tab" will automatically select whatever tab was last selected before saving. This is the default, and also the way that the system had previously functioned.
- "Select Default Tab" will select the default tab according to the settings set in "Default Tabs".

Form Builder – Validation Expression Creation & Implementation

Enabling a Validation Expression on your form is an easy way to ensure some fields are completed during an intake without having to select individual fields to be required. A Validation Expression will allow you to set a rule that, for example, at least 3 of 5 fields within a subsection must be completed, but it could be any 3 of the 5 fields. I will outline the process and requirements to create a Validation Expression below.

1. Once you have created a form, and are ready to enable a Validation Expression scroll to the top of the page and click on the Validation button in the upper right corner of the Form Builder page. This will open the modal to create a new expression.



2. Now that the Form Validation modal is open click on the "Add Validation Expression +" button. The modal will expand and reveal the fields need to create a new expression. Please note that ALL fields are required.

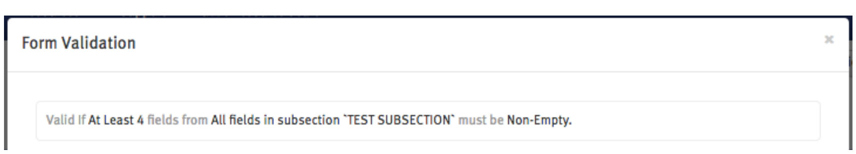
3. By default, the rule will be Number of Fields Required. Select a conditional operator by click on the drop-down menu. The available options are At Least, At Most and Exactly.

4. Enter the number of fields that should be non-empty in the next field. Please note that this field will only accept numerical characters, and will not accept text.

5. The validation message can be customized, but should display in the correct format by default. Customize the message if needed, but otherwise skip over this field.

6. The final field will be the target for the Validation Expression you are creating. The section, subsection or tab selected in this field is where the rule will be applied. Select your target from the drop-down menu.

7. Now that all fields have been completed, click the Save Validation Expression button to save this new rule. After saving, an overview of the rule you created will be displayed at the top of the modal.



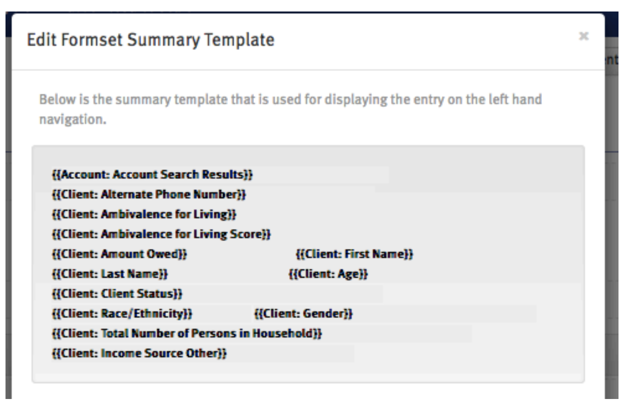
Currently there is no way to test a Validation Expression on a form that is not deployed. Therefore, you will need to complete any changes to the form, and deploy it to ensure the rule is functioning as desired.

Form Builder – Summary Template

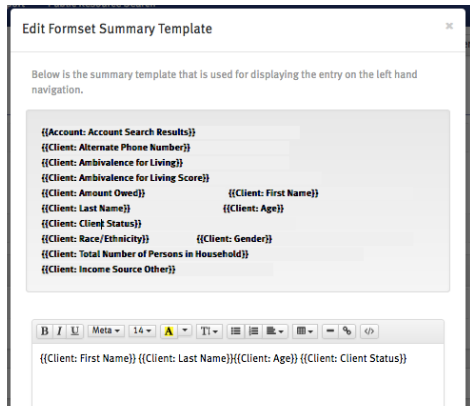
The Summary Template is a feature that will allow you to place select fields, and display their value in the left navigation bar of the entry form. The Summary Template can be used so that some information can be seen at a glance without having to look through the entire form to find pieces of information about a client. The Summary Template can be configured by following the steps below.

1. Once the fields you would like to place in the Summary Template have been added to the form, scroll to the top of the Form Builder page and click on the Summary Template button located on the upper right side. Doing so will open the Summary Template modal.

2. The Summary Template modal should now be open, and you should see a list of the fields currently placed on the form.



3. Click on the name of each field you would like to add to the Summary Template. Clicking on a field label will add the field to the below WYSWYG editor.



4. Use the WYSWYG editor to arrange the fields in the way you would like them to display in the Summary Template. Please note that each field will be enclosed in brackets. The brackets are a necessary character, and should not be removed.

5. Once the fields have been arranged in the desired format click the Save button to save your changes. After clicking Save, the modal should disappear and put you back into Form Builder.

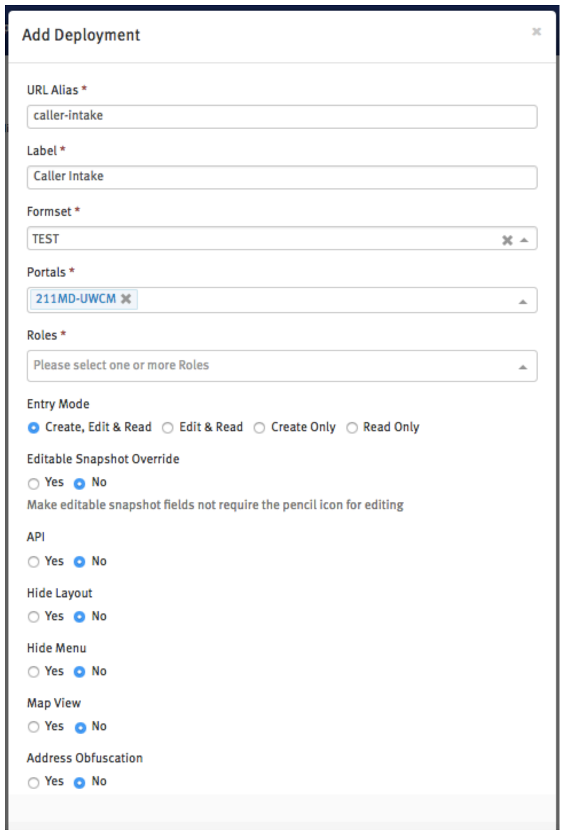
Form Builder – Creating a New Deployment

The term "Deployment" or "Deployed" is in regards to a form that has been published in your system. A deployed form, or a deployment is live, and can be accessed by users that have been granted access to the form. A deployed form can also be setup to be public facing as well allowing public users to access and complete the form without having to log into the system. I will outline the steps to deploy a newly created form below.

1. Once a form has been created, and all edits and changes have been completed an administrator may be ready to deploy the form. Scroll to the top of the page in Form Builder, and click on the Deployments button.

2. After clicking on Deployments, you will be taken to another page titled Formset Deployments. This page may look blank, but this is intended. All deployments of this form will be listed here. Click the Add Deployment button to continue.

3. You should now see the Add Deployment modal. The first field is the URL Alias. The URL Alias will be the location of the form. For example, if you enter "caller-intake" as the URL alias the location of the form within your system will be xxxx.communityos.org/caller-intake. Enter a URL Alias, and continue to the next field.

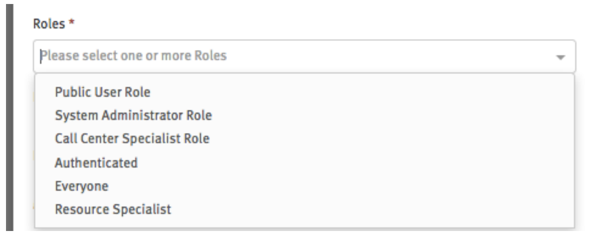


4. Label is the next field to complete. Label is simply a way to identify the deployment. Enter a label, and continue to the next field.

5. Formset is next. By default, this should be the form you were working on. Therefore, leave this field alone, and move on to the next field.

6. Portal is the location where you are deploying the form. Click and select your portal, and continue to the next field.

7. The next field is Roles. This is very important. Clicking the drop-down menu will display all of the Roles within your system that you can grant access to this form. Only select the Role for individuals, or groups of users that you would like to be able to access this form.



8. Below Roles is a series of radio button settings. I will outline each of those settings in a list below.

9. Click Submit to continue and make your deployment live. If the submit was successful, you should now see an entry for the deployment you created in the Formset Deployment list.

Client

Deployment URL	Label	Formset	ID	Entry Mode	Additional Settings	API	Hidden Layout	Hidden Menu	Portals	Actions
/caller-intake	Caller Intake	TEST	103			–	–	–	211MD-UWCM (211mduwcm-training.communityos.org)	

Deployment Properties

- Entry Mode – Here you can select how the deployment can be used. The Entry Mode can be set to allow users to Create, Edit & Read records from the deployment, Edit & Read Only, Create Only or Read Only.
- API (Application Program Interface) – This setting is used to allow the connection of another system to the deployment. Systems can be setup to share information with each other. If you need additional information on setting up and API please contact your Account Manager.
- Hide Layout – Enabling this will hide the top menu bar when viewing the deployment. With the layout hidden users will no longer see menu items, or the Log Out button when viewing the deployment.
- Hide Menu – Enabling this will hide the left navigation bar within the form. With the Menu hidden users will no longer be able to see the Summary Template when viewing this deployment.
- Map View – Enabling this tool will add a map to the form. The map can contain plotted points for addresses.
- Address Obfuscation – This feature impacts the Map. Enabling this will save a blurred latitude/longitude location in the database and will display in that different location on the map. This prevents the map from displaying the exact location entered into the system.