

## Project Options: Creating a new form

### Creating a new form

Form Admin > Infocapture click *Add a new project*

It's time to add in the basic details of your form.

**N.B.** If your intranet was last installed or updated **before 26th July 2018 (Version 8.4)** then you will see a greater number of options here. Consult this article for the full list of properties, which have since been moved into the Project Properties screen visible after your form is created.

**Name:** The title of your project. The form's purpose should be clear and meaningful to the users from its name.

**Project Status:** Set to Blocked for the project to only be visible from the admin side until you are ready. Set to Testing if you wish it to be visible on the 'front end', but the project will not send out any notification emails. Set to Active if you wish for the project to be visible, and to allow notification emails to go out.

It's most likely you'll want to set this to *Testing* for now.

For all the following settings, don't feel you have to define them now. They can be changed again later from *Infocapture > Admin > Your Project > Project Properties*.

**Change Icon:** Pick an icon that matches the form's purpose. The color can also be changed.

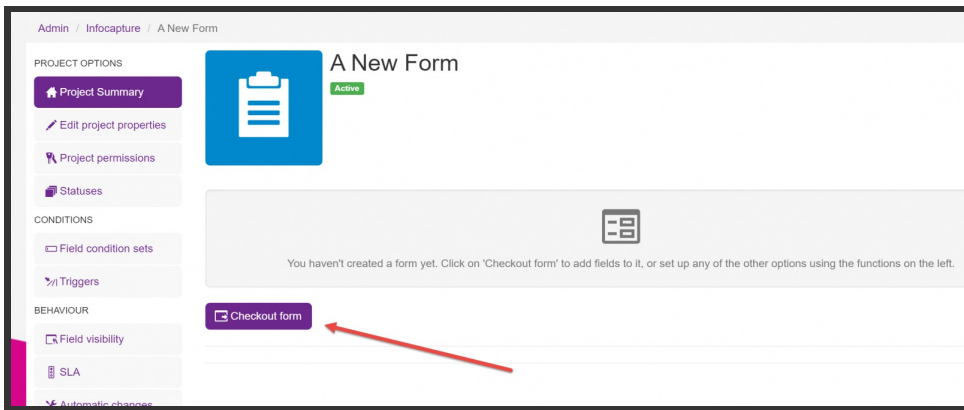
**Describe its purpose:** This short description will appear to other administrators, when viewing your list of available projects under Admin > Infocapture. You may find it useful to add a note here if you're still testing, to let other administrators know to not yet set the status to Active.

**Short description:** A sentence that can appear at the top of the page when users access your form. You may instead wish to use Full Description for a more attractive message with formatted text.

**Full description:** A text editor that can allow you to put formatted text or images at the top of the page when users access the form. This is useful for adding in a corporate branding image as a header, or a message about what the user needs to know before filling out the form.

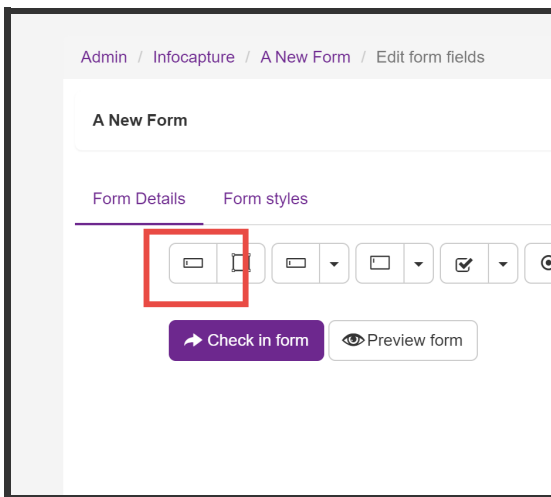
# Using the form builder

You'll now be presented with a message "You haven't created a form yet. Click on 'Checkout form' to add fields to it, or set up any of the other options using the functions on the left.". Click the *Checkout Form* button to start adding your form fields.



## Adding fields

Click the *add a new field* button here:



You will now be presented with the *Fields Properties* screen:

Give your new field a **name**. This is the text label that will appear beside the field, and this will be visible to the user. This is called the "Field Label". Once you've entered a name, Infocapture will copy it to the **symbolic name**. The symbolic name is not visible to the user and is only used in the background, unseen from the front of the form. The symbolic name is a reference, used by Infocapture as an identifier when the form loads and works through logical processes. The symbolic name must always be unique and cannot be repeated. You could simply see it as the **name** is what the human user sees the field as being called, and the **symbolic name** is what the computer system sees the field as being called.

Use the **optional hint** to add a tooltip to the field. A question mark symbol will appear to the left of the field label, which the user can hover over to receive more information on what exactly they should be inputting into the field.

The **Type** of field is very important. This needs to be suitable for the kind of information you're trying to collect. Your options are:

**Short, Medium and Long string:** For entering text, numbers, and emails. Choose one of the three options depending on how wide you would like the field to be.

You will also be asked to choose "String format":

**Text:** For allowing any input.

**Integer:** Allow a numerical value, *without* allowing the use of a decimal place.

**Floating point:** Allow a numerical value, *and do allow* the use of a decimal place.

**Email:** Only allow an email to be input. If you choose this option, you will later be able to set notifications to go to whatever email is specified in this field.

**Short, Medium and Long text:** For larger text inputs. Whereas the String field is one line tall, these text fields are taller boxes. A Medium or Long text box would be suitable where you are expecting your user to type out a paragraph's worth of information.

**BBCode text:** This is a similar text box, but it will allow the user to use BBCode formatting on their text if they wish to use bold, italic, or underlining.

**Checkbox:** A single checkbox, useful for true/false statements.

**Multiple Checkbox:** A list of checkboxes. **Important: Multiple checkboxes cannot be used later with conditions.** You will not be able to setup any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use a multiple checkbox if you're interested in having users tick off a list of options, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**Radio:** A row of options, where the user can only pick one. All the options are visible at once in a row, or a list if you go to the 'style' tab and uncheck *horizontal layout*

**Select:** A list of options, where the user can only pick one. Options are presented in a dropdown list. Enter your list options in the order you'd like them to appear, in the 'values' box. Once added, if you edit the field you'll notice Infocapture has added a comma and an identification number to each of your list options. Do not amend these numbers, they are used to reference how the data is stored in the database, rather than where they appear on the list. To remove a list option, remove the whole line including this reference number.

If your list has many options, you may wish to tick the box *Use advanced UI for selecting elements*. This will allow your users to type in the list option they're looking for, and it will search the list for them.

**Multiple select:** A list of options the same as above, but the user can pick more than one. It's recommended that you do tick the checkbox *Use advanced UI for selecting elements* if using this field. **Important: Multiple Selects cannot be used later with conditions.** You will not be able to setup any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use a multiple select list if you're interested in having users select multiple options from a list, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**Date fields:** You have three options, a standard date picker, one that includes a time picker as well, and a date picker using dropdown lists.

**Users list:** Select a user from your intranet. If your list has many options, you may wish to tick the box *Use advanced UI for selecting elements*. This will allow your users to type in the list option they're looking for, and it will search the list for them.

**Important:** Once you have saved this field, you will need to edit it, and click 'Edit Selectable Users', to define who should appear in this list. If you wish to have all your intranet users, search for *All Registered* and use the option that appears when typed.

**Multiple users list:** Same as above, but with the ability to select more than one user. **Important: Multiple Users lists cannot be used later with conditions.** You will not be able to setup any kind of logical rule, visibility permissions, notifications, etc. with this field type. Only use a multiple users list if you're interested in having users select multiple users from your intranet, but you don't need any dynamic behaviour or notifications to occur as a result of their choices.

**HTML:** Allow the user to see and use CKEditor, a WYSIWYG (What You See Is What You Get) text editor. It is rare that you will need to allow a user to enter rich formatted text, so the use of this field is unlikely.

**Notice:** This is for entering text onto the form, as well as pictures. Data isn't entered by the user for this field type. You are presented with CKEditor to enter your text and images.

A notice field is especially useful if you need to enter your own text onto the form for your users to see. For example, you may wish to describe how exactly you would like them to fill out the form, and what they can expect once they've submitted.

**Group and Role:** These are for selecting user groups and roles, as defined in *Admin > People > Groups and Roles*. The need for this field is rare, it is fairly unlikely you will use these field types.

**Document:** This is for selecting a document from the *Documents* application.

**File upload:** This is for uploading a file directly to the form, however - **only use this field type if** you want to be able to hide this file upload later. The form will have a file upload section anyway, visible to all users who can see the form. You would only want to use this file upload field type if, for example, you only want the individual submitting the form and anyone in the Managers role to be able to see this file that's being uploaded here, but for anyone else you don't want them to see it.

Do keep this in mind, as 9 out of 10 times it is better to use the standard File Upload section at the bottom of the form - i.e. do *not* use this field type in most cases.

**Label:** This is for adding a small amount of text to the right of the form. Useful for adding a commentary note on a group of fields, for example. Data isn't entered by the user for this field type.

**Signature pad:** An electronic signature field. The user can type out their name, and the field will record and display the exact time and logged in user who performed this action.

**Financial:** Intended for number values that must be kept to two decimal places, such as financial amounts.

When creating fields, you'll see the option to add a *Default Value*. This is useful if you wish for a particular piece of data to already be populated in the field, when a new form is created.

*Required* is used if it should be mandatory that the user adds data.

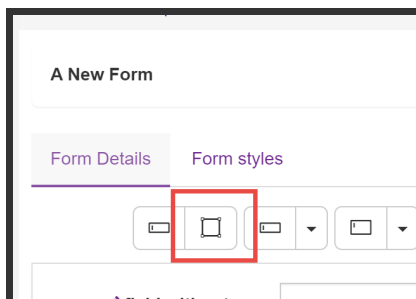
*Disabled* is used if you would like the field to be 'greyed out' so that it can be seen but not amended.

If you wish for some users to be able to edit, but not others, then don't use this - change this instead later using *Field Visibility* within the project properties.

*Reload form on changing* is required if you plan to later implement any *Field Visibility* rules. For example, if a checkbox labelled 'Additional comments' is ticked, I want a large textbox to appear. I would set this checkbox to be reload form on changing, so that the page quickly reloads and sees that the box is now ticked - a *Field Condition Set* that the box is checked has now become true, and as a result my *Field Visibility* rule to reveal a textbox occurs.

## Creating sections

You may find it useful to break up your form into sections. At the top, use this *Add Section* button:



This will allow you to divide up the form into areas that ease the understanding of the form's purpose.

For example, you may have a section called "Initial Request Information". A second section may be called "Manager's comments".

If you have already added fields to your form, you can choose which section they should belong to by editing the field, and changing its position within the *Style* tab.

## Saving your work

When you have finished, click *Check In Form* at the bottom of the page.

If this is not the first version of the form, i.e. you have made an amendment to an existing form, then leave a version comment explaining exactly what you changed.

It is essential that this is done - without the version comment, it is almost impossible for other administrators and for Clarentis Support to be able to tell what's different between versions, making troubleshooting much more difficult.

## Example screenshots of form fields

Here are some screenshots of a form that has one of each kind of form field on it.

These are how the form fields appear to an end user viewing a form you have created. You'll see that many of the fields contain example data and text.

<b>Short string</b>	text here
<b>Medium string</b>	text heretext here text here text here text here text here text here
<b>Long string</b>	text here text here text here text here text here text here text here text here text here text here text here text here
<b>Financial</b>	2,399.21
<b>Short text</b>	text here text here
<b>Medium text</b>	text here text here text here text here text here text here
<b>Long text</b>	text here text here text here text here text here text here text here text here text here text here text here text here text here here text here text here text here text here text here text here text here text here
<b>BBCode text</b>	<b>text here text here</b> <i>text here text here</i>

<b>Single checkbox</b>	Yes
<b>Multiple Checkboxes</b>	One, Two, Three
<b>Radio buttons</b>	Bilberry
<b>Select dropdown</b>	Daphnee Schoen
<b>Select field with search</b>	Atlanta Hawks
<b>Multiple Select</b>	Accounting & Finance, Agriculture & Forestry
<b>Date</b>	15-06-2018
<b>Date and time</b>	15-06-2018 12:22
<b>Date (3 dropdowns)</b>	
<b>User Select</b>	<a href="#">Dan Butler</a>
<b>Multiple User Select</b>	<a href="#">John Vance</a> , <a href="#">Joshua Tucker</a> , <a href="#">Phil Lawrence</a>

HTML This is an HTML field, which allows the use of CKeditor, a WYSIWYG editor.

*This editor remains visible so that the user can make use of its text formatting functions.*

This is a Notice field, which allows the use of CKeditor, a WYSIWYG editor.

*I can include text that can be formatted as I like*

**This differs from the HTML field in that the user cannot see the editor, just whatever text has been input by the form creator.**

This field type can also be used to insert images like so:

Meet our newest staff members

Search People



Jason Reid  
Marketing Assistant



Jennifer Langdon  
Marketing Manager



Joanne Thomson  
Support Technician

Group Company

Role Administrators

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Tags: infocapture, new form, user guide, form builder