Configure or Edit Form Questions

After creating a form by entering the form details, you need to design and configure the questions that will appear on the form. The same procedures can also be used to edit the questionnaire for an existing form.

Since questionnaires are highly configurable, it is important to have a clear idea about the type of information you want to collect and the questions that will help you collect it.

Note:

- When setting up a new form, if **Active** is selected in the template, saving the form makes it available to users even if you have not yet configured the questionnaire.
- When editing the questions on a form, the changes you make are not available to users until you click **Publish**.
- You can format instructions on a form by applying bold or italic typeface, creating lists, indenting text, and more.
- The **Report Label** field allows you to provide abbreviated question text to be used in notifications and reports.
- For details about configuring each type of question, see About Questions.
- You can **Save** your questionnaire at any time.

To access the form questionnaire

1. In the main menu, click **Form** and then click **Configure Forms**. The *Form Configuration* page opens.
2. Locate the form and, on that row, click **Questionnaire**. The *Form* window opens.
3. Complete some or all of the following procedures.

To add instructions

1. On the *Form* window, on the upper right, click **Insert** and, in the menu, click **Instructions**. The *Instructions* window opens.
2. Enter and format the instructions.
3. Click **Save**. The *Instructions* window closes.

To add a group

1. On the *Form* window, on the upper right, click **Insert** and, in the menu, click **Group**. The *Group* window opens.
2. For **Label**, enter the name of the section.
3. Click **Save**. The *Group* window closes.
4. Continue with the procedures To populate a group and, if necessary, To populate an element set.

To add a table

1. On the *Form* window, on the upper right, click **Insert** and, in the menu, click **Table**. The *Table* window opens.
2. For *Rows*, take these actions.

    a. For **New Row**, enter the name of the row.
    b. To add more rows, click the plus icon and enter a name for each row.
    c. To delete rows, click the minus icon for those rows.
    d. To reorganize rows, click the three bar icon and drag that row to another position.
3. For *Columns*, take these actions.

    a. For **New Column**, enter the name of the column.
    b. In the menu on the right, select the type of content.
    c. If necessary, click the edit icon and enter the Attributes, Validations, and Default Value for that column.
    d. To add more columns, click the plus icon and enter a name for each column, specify the type of content, and enter the Attributes, Validations, and Default Value for the columns.
    e. To delete columns, click the minus icon for those columns.
    f. To reorganize columns, click the three bar icon and drag that column to another position.
4. Click **Save**. The *Table* window closes.

To populate a group

1. On the *Form* window, locate the group and in the group title bar, click **Insert**.
2. Take one of these actions.

If you want to add...	Then...
Element Set	a. Click **Element Set**. The *Element Set* window opens. b. For **Label**, enter the name of the set. c. Click **Save**. The *Element Set* window closes.
Instructions	a. Click **Instructions**. The *Instructions* window opens. b. Enter and format the instructions. c. Click **Save**. The *Instructions* window closes.
Table	a. Click **Table**. The *Table* window opens. b. In the *Rows* section, take these actions. i. For **New Row**, enter the name of the row. ii. To add more rows, click the plus icon and enter a name for each row. iii. To delete rows, click the minus icon for those rows. iv. To reorganize rows, click the three bar icon and drag it to another position. c. In the *Columns* section, take these actions. i. For **New Column**, enter the name of the column. ii. In the menu on the right, select the type of content. iii. If necessary, click the edit icon and enter the Attributes, Validations, and Default Value for that column. iv. To add more columns, click the plus icon and enter a name for each column, specify the type of content, and enter the Attributes, Validations, and Default Value for the columns. v. To delete columns, click the minus icon for those columns. vi. To reorganize columns, click the three bar icon and drag that column to another position. d. Click **Save**. The *Table* window closes.

To populate an element set

1. On the *Form* window, locate the element set and in the title bar, click the plus icon. The *Element* window opens.
2. For **Type**, select the type of element (**Boolean**, **Checkbox**, **Date/Time**, **Instructions**, **Multi-select**, **Numeric**, **Single Line Text**, **Multi-Line Text**, **Radio**, **Single Select**, or **Typeahead Select**).
3. In the *Attributes* section, enter the information for that element type.

Field	Description
Label	Question or text you want to appear for this field.
Date type	Date elements you will accept for this field: **Date**, **Time**, or **Date/Time**.
Instructions	Text for the instructions.
Numeric Type	Numeric elements you will accept for this field: **Number**, **Percentage**, or **Currency**.
Decimal Places	Number of places after the decimal point you will accept for this field.
ToolTip Help	Brief description of the field that will appear when the user points to a help icon next to this field.

Add to Summary	If selected, this field will be included in the form summary.
Report Label	Shorter name or abbreviation for this field that will be used in reports.
Watermark	Light gray text you want to appear in this field to provide an example of the type of data you want the user to enter. For example, a telephone number field might have a watermark that shows *555-555-1234* to indicate the format.

4. If available, in the *Validations* section, enter this information.

Field	Description
Required	If selected, information must be entered in this field to complete the form.
Min Length	Minimum number of characters or minimum numeric value allowed for entries in this field to be valid.
Max Length	Maximum number of characters or maximum numeric value allowed for entries in this field to be valid.
Allowed dates	Specifies acceptable date and time values (for example, any dates, floating date range, fixed date range, future dates, or past dates).

5. If available, in the *Choices* section, take one of these actions.

If you want to...	Then...
Use a predefined list of options,	a. Select the **Use a Standard List** check box. b. In the **List to use** list, click the content list you want to offer.
Create a list,	i. For **New Choice**, enter the name of the choice or option. ii. To add more choices, click the plus icon and enter a name for each choice. iii. To delete choices, click the minus icon for those choices. iv. To reorganize choices, use the order icon to drag choices to another position within the section.

6. If available and appropriate, in the *Default* section, enter a **Default Value** for this field.
7. Click **Save**.

To edit an instruction, group, or table

1. On the *Form* window, locate the item and in the title bar, click the pencil icon. The edit window opens.
2. Make your changes.
3. Click **Save**. The edit window closes.

To change the order of components

On the *Form* window, locate the item you want to move and on the left, click the three bar icon and drag it to another position.

To remove a form question or element

Note: Removing a group or element set deletes all options within that group, including instructions, questions, and tables.

1. On the *Form* window, locate the item and in the title bar, click the trash can icon. The *Remove* window opens and asks you to confirm.
2. Click **OK**. The window closes.

To save, preview, or publish

The **Save** and **Preview** buttons are not available until all required information has been provided. For example, if you added a question without specifying a name (**Label**), the **Save** and **Preview** buttons are disabled.

On the *Form* window, take one of these actions.

If you want to...	Then...
Save,	Click **Save**. Changes to the form questions are saved.
Preview,	a. Click **Preview**. The form appears as it will for users. b. If appropriate, click **Validate** to check field components. c. Click **Close Preview**. The window returns to edit mode.
Save and Publish,	Click **Save & Publish**. The form will appear and can be selected in the **Form** menu.