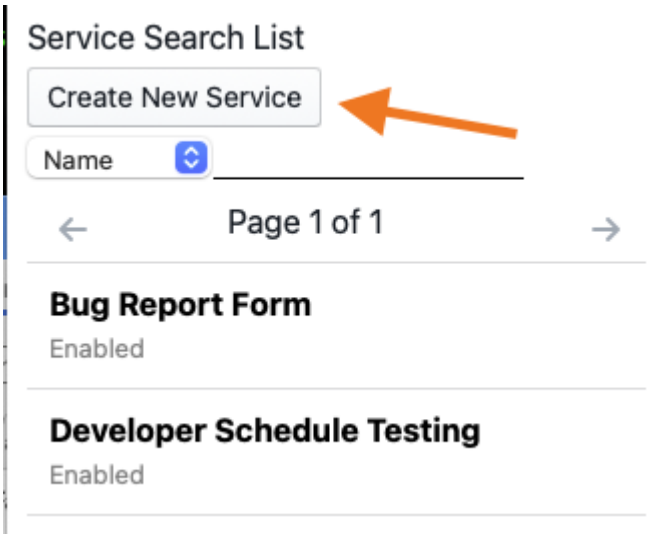
Data Collection Form Sub-system

- Creating a Data Collection Form
- Signature Blocks
- Custom Form Configuration Overview
- Charge Calculation Fields

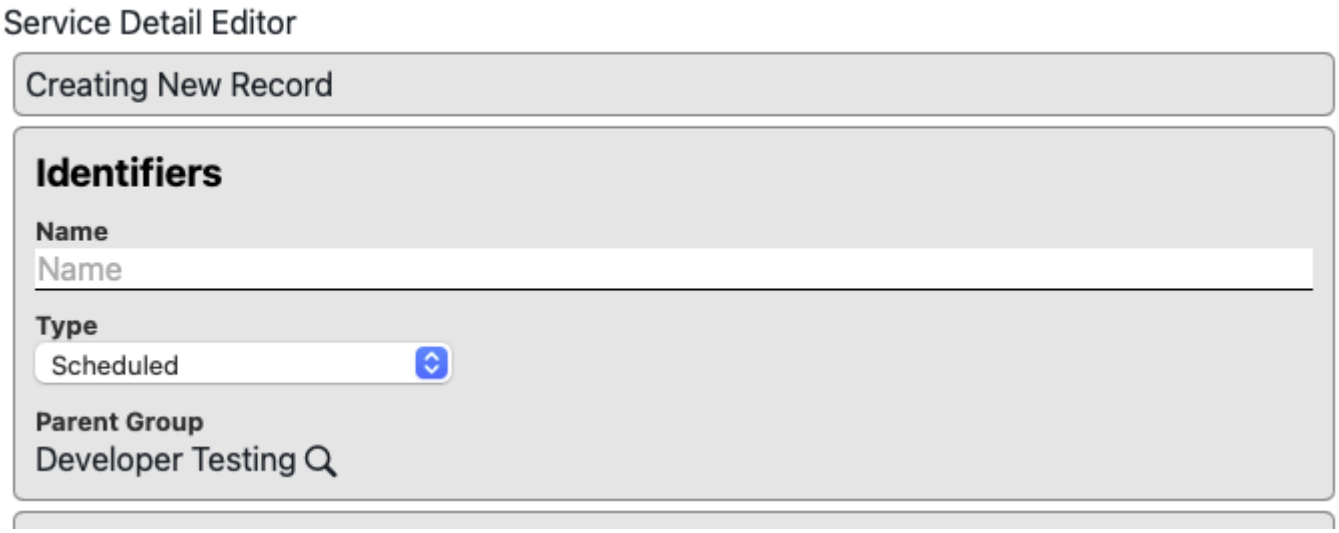
Creating a Data Collection Form

Creating a new service

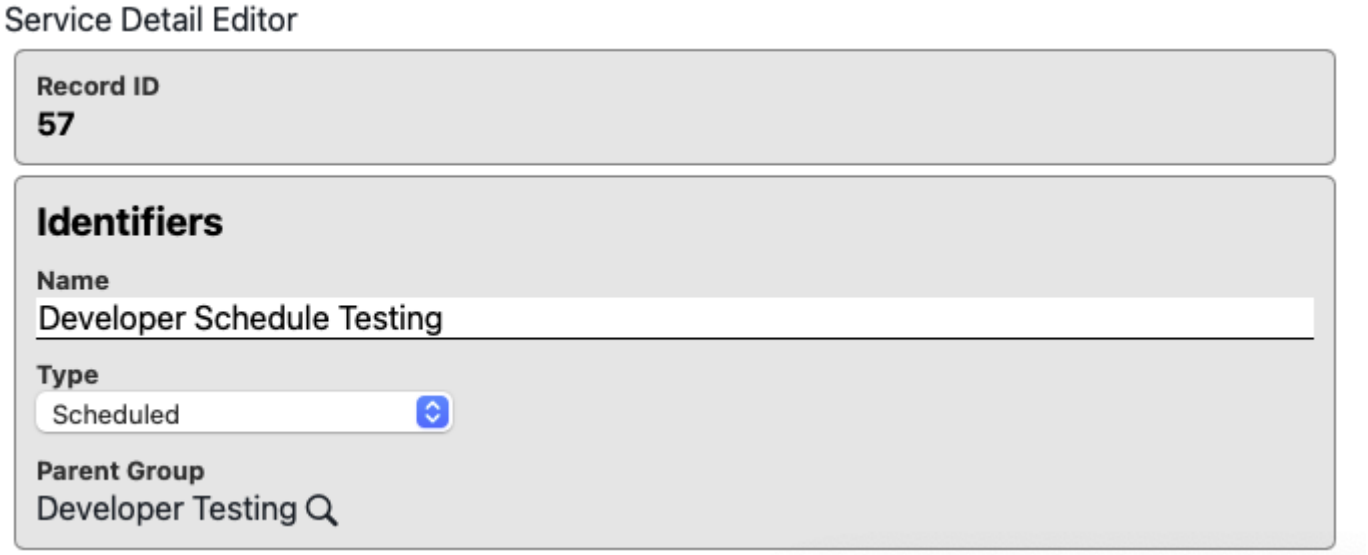
A new service can be created by clicking the "Create New Service" button located above the service list search box



Newly created services will not exist until saved after initial configuration. This means that some functionality that needs an id number such as creating service rates will not be available until the user click the "Save" button to save a newly created service.

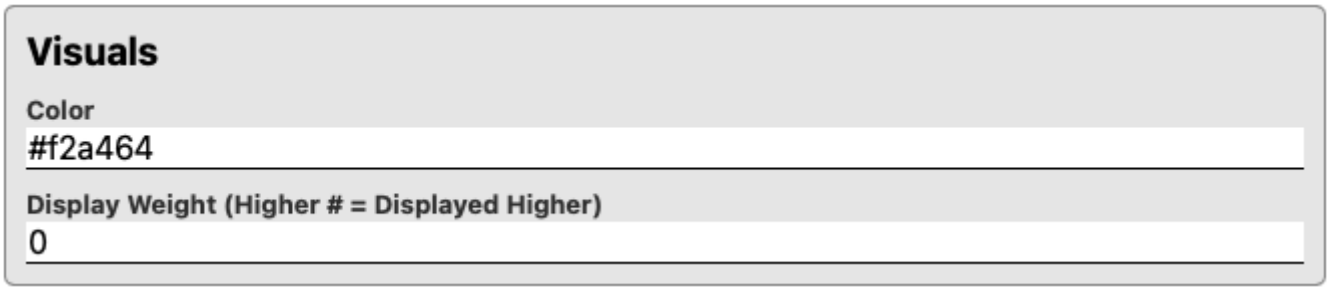


Identifiers

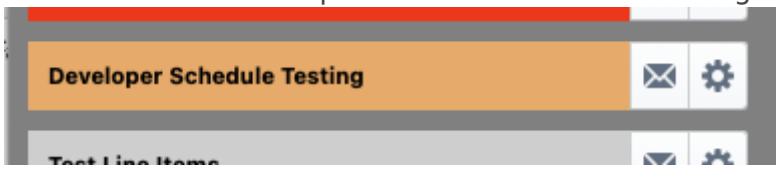


- **Record ID** - The system ID number identifying the service
- **Name** - The display name of the service in question.
- **Type** - The type of the service. Defaults to "Scheduled"
- **Parent Group** - The group to which this service belongs. Defaults to the currently active group but may be changed to any group that the creating user is listed as a manager for

Visuals



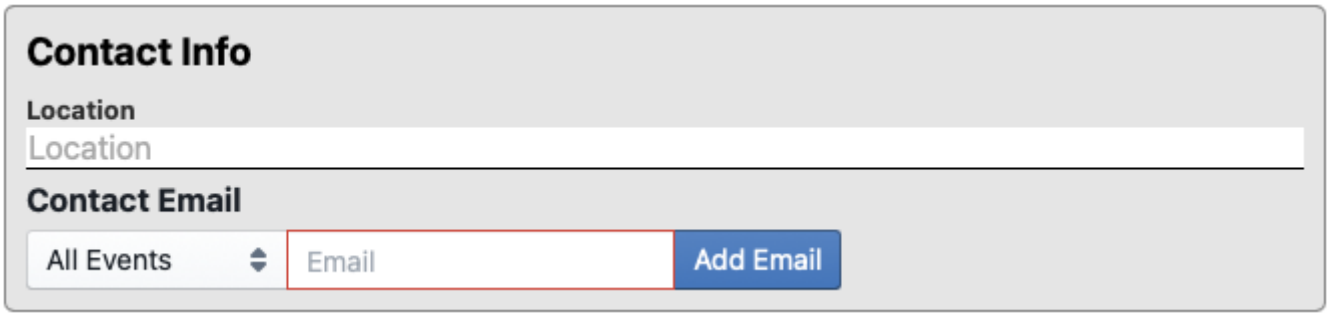
- **Color** - The color of the button to access the service as it appears in the group services list. This field will accept and valid CSS color in string format. Ex:



- **Display Weight** - How high in the list a service will be displayed. Higher values will display first. Ex: 10 will appear after 50
- **Display Path** - For facilities with large numbers of instruments / services it can be helpful to have some additional level of organization. The display path setting allows managers to organize services into folder style nested groupings. The convention follow standard unix pathing conventions. Ex: "/Microscopes/" will display the given service under an

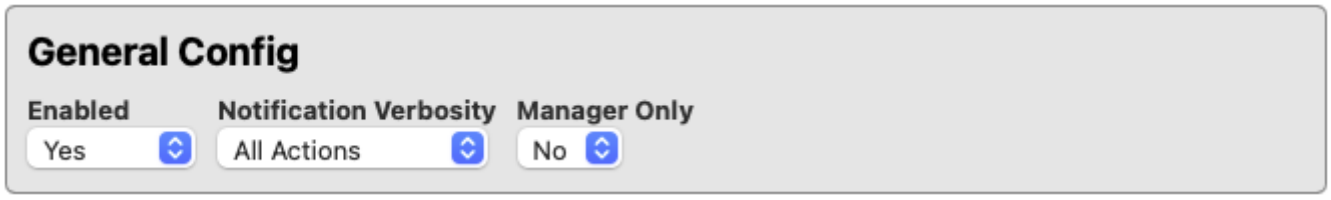
expandable section with all other services that have the same configuration.

Contact Information



- **Location** - The location the service is located at. This field is optional and will display after the service name on the list of services
- **Contact Email** - The list of email addresses that should be send a notification message. The contact email list can be configured to send emails to any number of addresses. Generally this will be the email of the person or persons responsible for managing the instrument. Email contacts can be configured to receive emails on the following events:
  - **All Events** - Send a notification for form creation, deletion, and update actions
  - **Only Create** - Send a notification on form creation
  - **Only Update** - Send a notification on form update
  - **Only Delete** - Send a notification on form deletion
- Note: The contact email configuration does NOT override the general "Notification Verbosity" setting for the service. If a service is configured to suppress all notification messages then no emails will be sent regardless of the contact email configuration. Also note that Line Item orders only generate "Create" notifications.

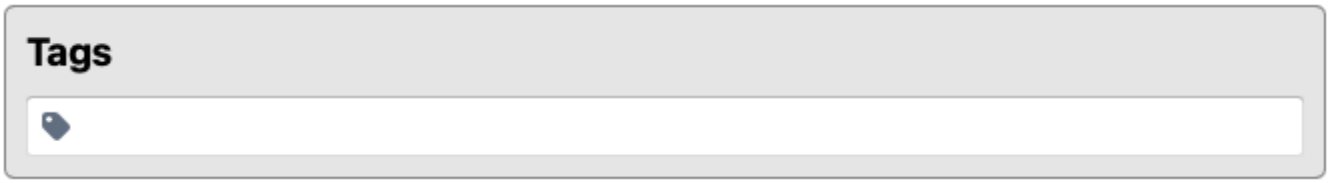
General Config



- **Enabled** - Whether this services is actively in use
  - Yes - Active
  - No - Inactive
  - Archived - Inactive and hidden from search list. (Used for removing services from general use and declutting un-used service records
- **Notification Verbosity** - When to send notification emails for actions that occur on the service
  - No Messages - No notifications sent

- On Create - Only send order creation notifications
- On Delete Only - Only send event deletion notifications (Delete not applicable for Line Item Orders)
- On Create/Delete - Only order notification when an event is created or deleted (Delete not applicable for Line Item Orders)
- All Messages - Send notification for all event creation, update, and delete actions (Delete and Update not applicable for Line Item Orders)

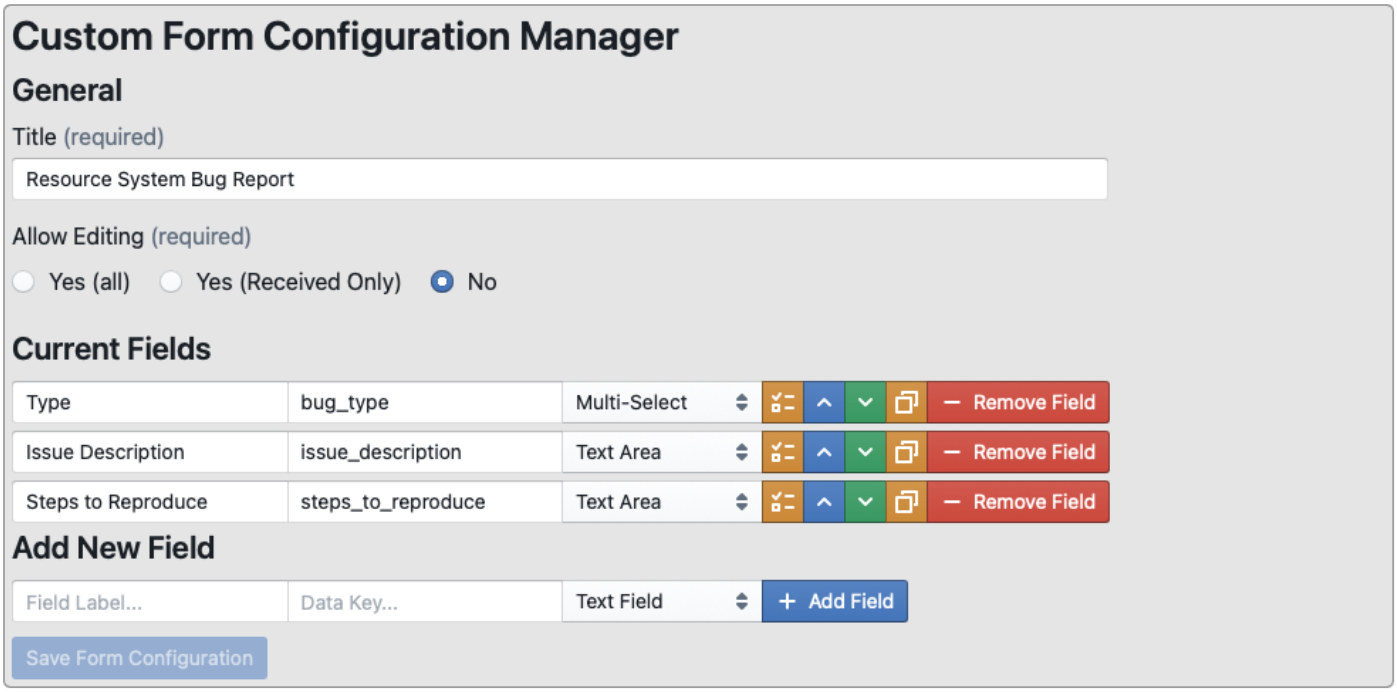
Tags



Tag strings used by the system for categorization and certain actions. No special tags are defined for services at this time.

Form Configuration Manager

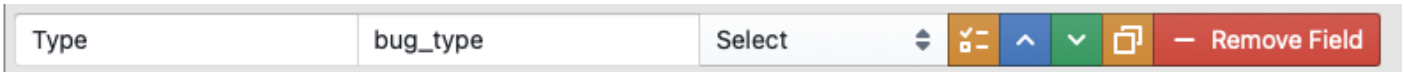
Custom data collection forms can be configured to collect any desired data including digital signatures from submitters.



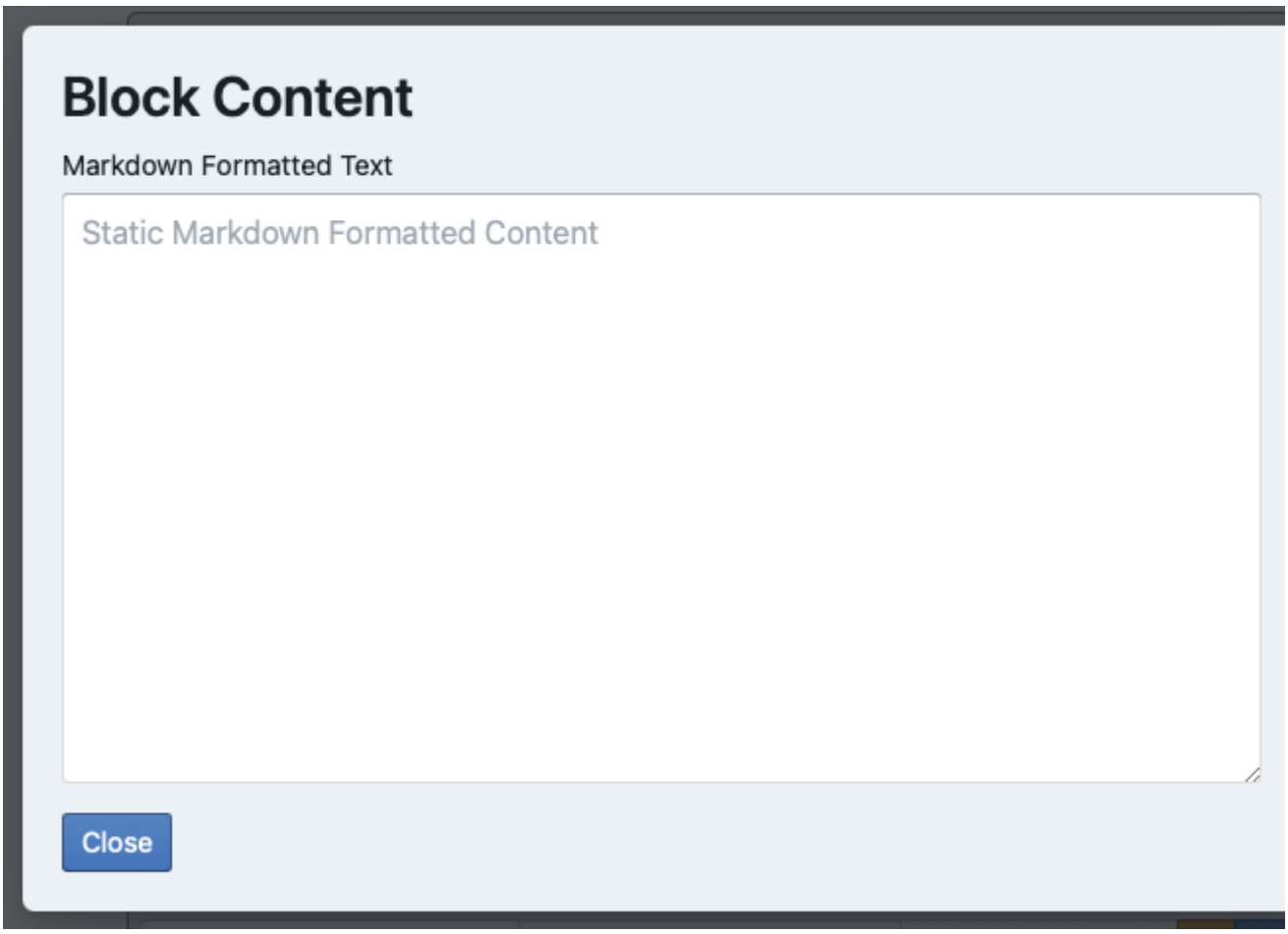
1. **Title** - The title of the form
2. **Allow Editing**
    1. **Yes (all)** - Allow users to edit form submissions after submission

2. **Yes (Recieved Only)** - Allow users to edit form submission as long as they are in the "Received" state
3. **No** - Disallow form editing after submission

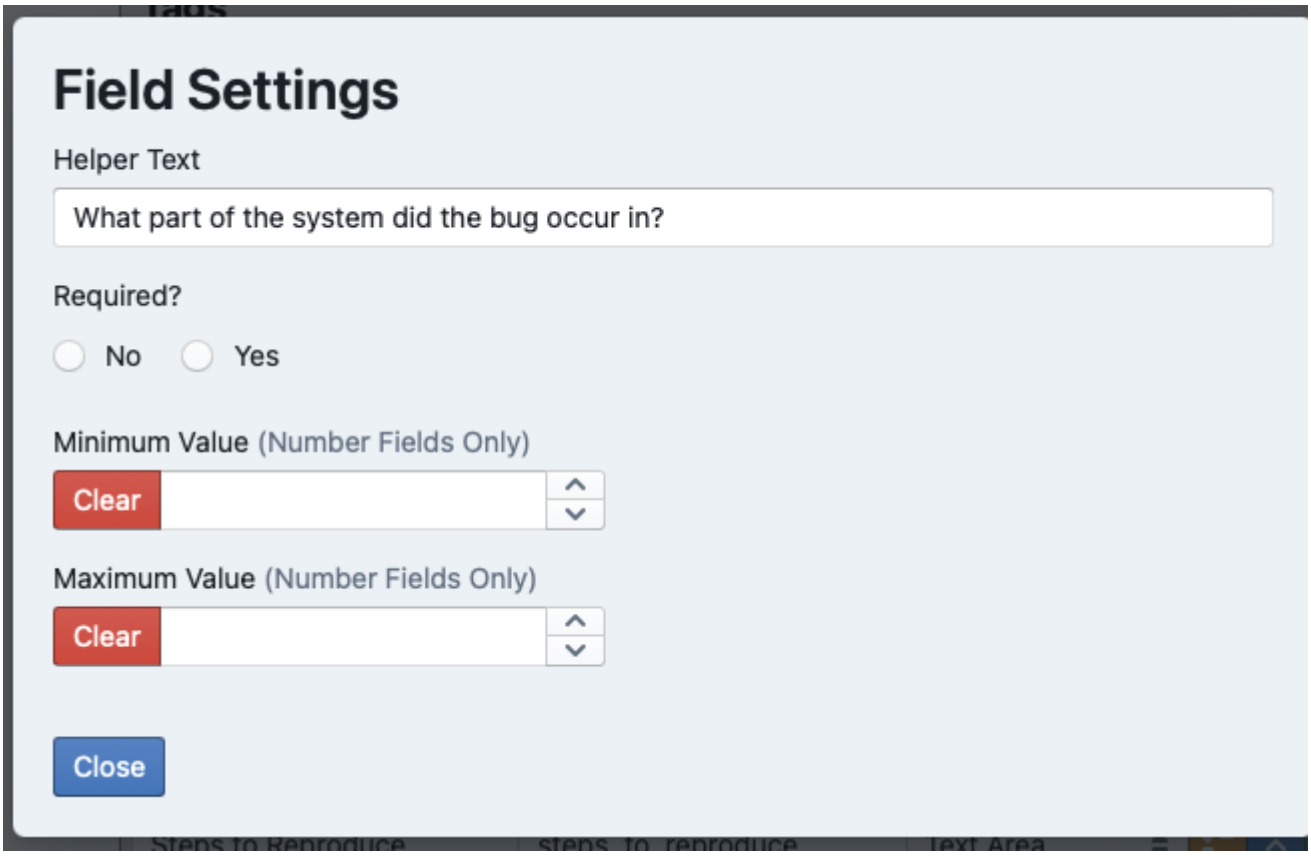
3. **Current Fields** - Control and edit the forms for this data collection form



1. **Label Field** - Used to set the name of the field
2. **Data Key Field** - Defines the name of the storage variable. Should be unique across all fields
3. **Field Type Selector**
   - **Markdown Block** - Display a markdown formatted section of text
   - **Text Field** - Single Line Text Field
   - **Text Area** - Multi-line text field
   - **Number** - Floating point number field
   - **Select** - Single Item select
   - **Multi-Select** - multiple item select
   - **Section Divider** - Section Divider with or without title
   - **Signature Block** - Email target for signature request
4. **Field Details/Config Button** - Displays field type configurations
   - **Markdown Block**

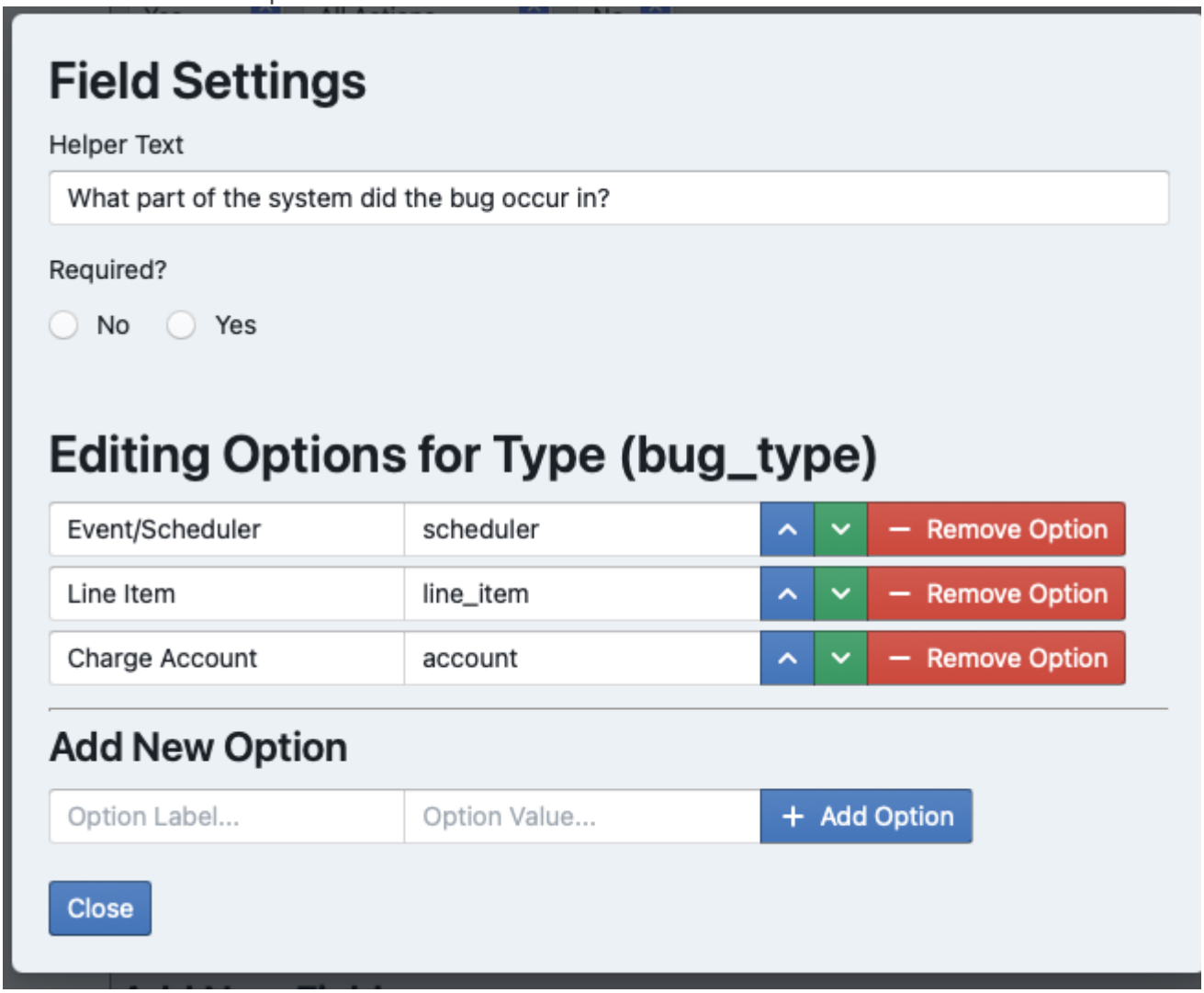


   - **Text Field** - Single Line Text Field
   - **Text Area** - Multi-line text field
   - **Number** - Floating point number field



- **Select** - Single Item select

- **Multi-Select** - multiple item select

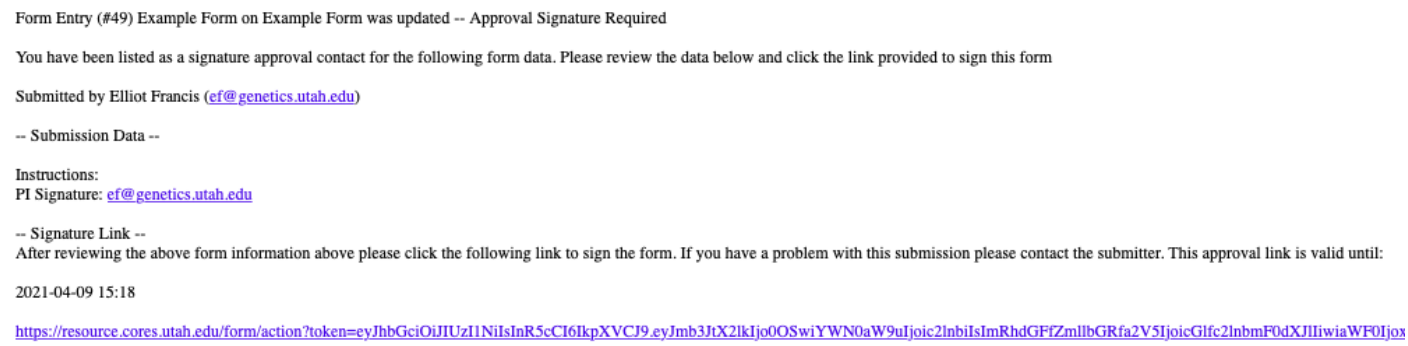


- **Section Divider** - Section Divider with or without title
- **Signature Block** - Email target for signature request

5. **Move Field Up** - Alters display position of field
6. **Move Field Down** - Alters display position of field
7. **Copy Field Button**
8. **Remove Field Button**

Signature Blocks

Custom Data Forms can be used to collect approvals from anyone who has an email address. The email address of the person who is supposed to approve the submission will receive an email with an approval link included in it.



Form Entry (#49) Example Form on Example Form was updated -- Approval Signature Required

You have been listed as a signature approval contact for the following form data. Please review the data below and click the link provided to sign this form

Submitted by Elliot Francis (ef@genetics.utah.edu)

-- Submission Data --

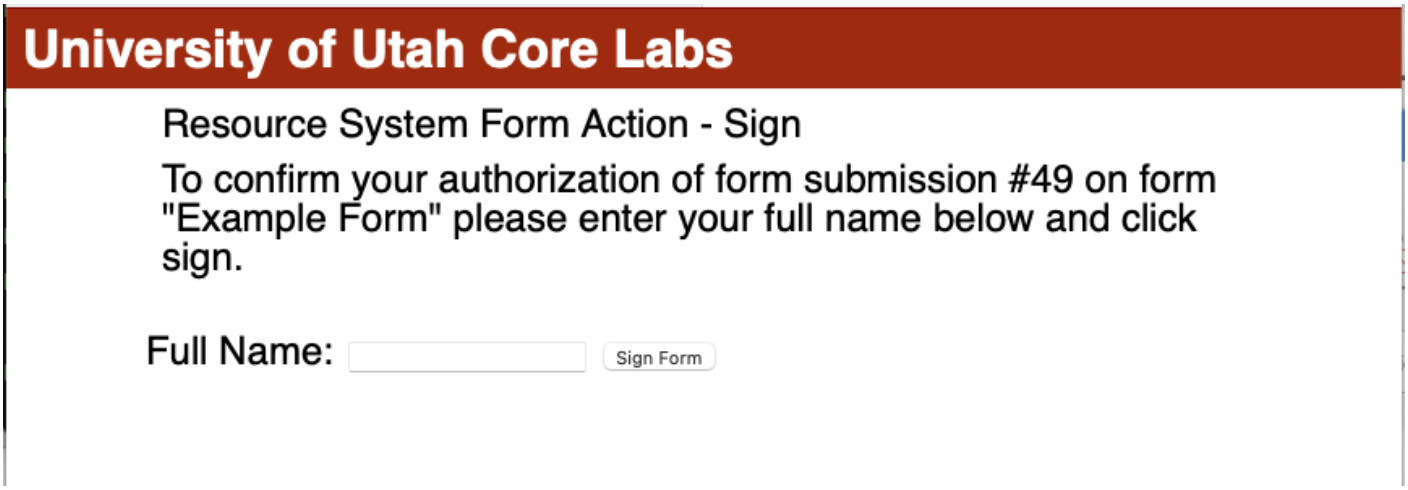
Instructions:
PI Signature: ef@genetics.utah.edu

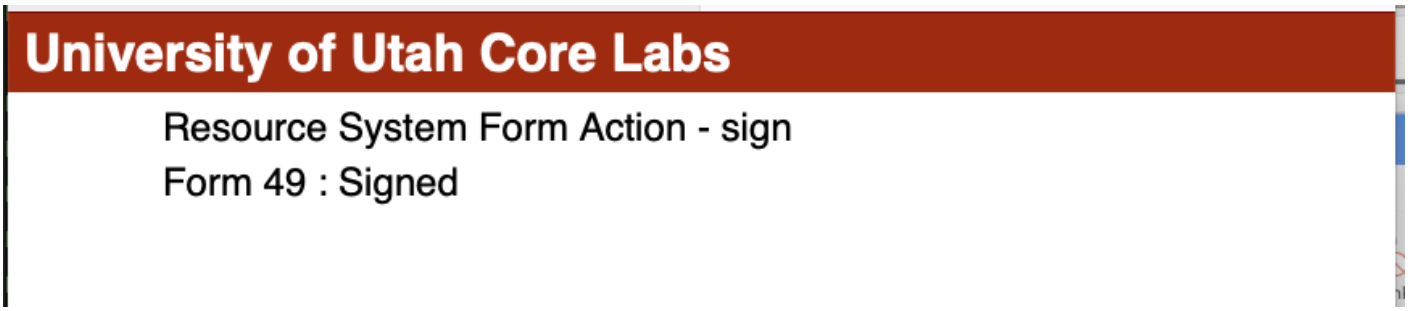
-- Signature Link --
After reviewing the above form information above please click the following link to sign the form. If you have a problem with this submission please contact the submitter. This approval link is valid until:

2021-04-09 15:18

https://resource.cores.utah.edu/form/action?token=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJmb3JtX2lkIjo0OSwiYWN0aW9uIjoic2lnbiIsImRhdGFfZmllbGRfa2V5IjoicGlfc2lnbmF0dXJlIiwiaWF0Ijox

The can then click on the link and will be prompted to provide a digital "signature" in the form of their full name.





If the form has already been signed the system will display a notification AFTER the signature has been submitted.

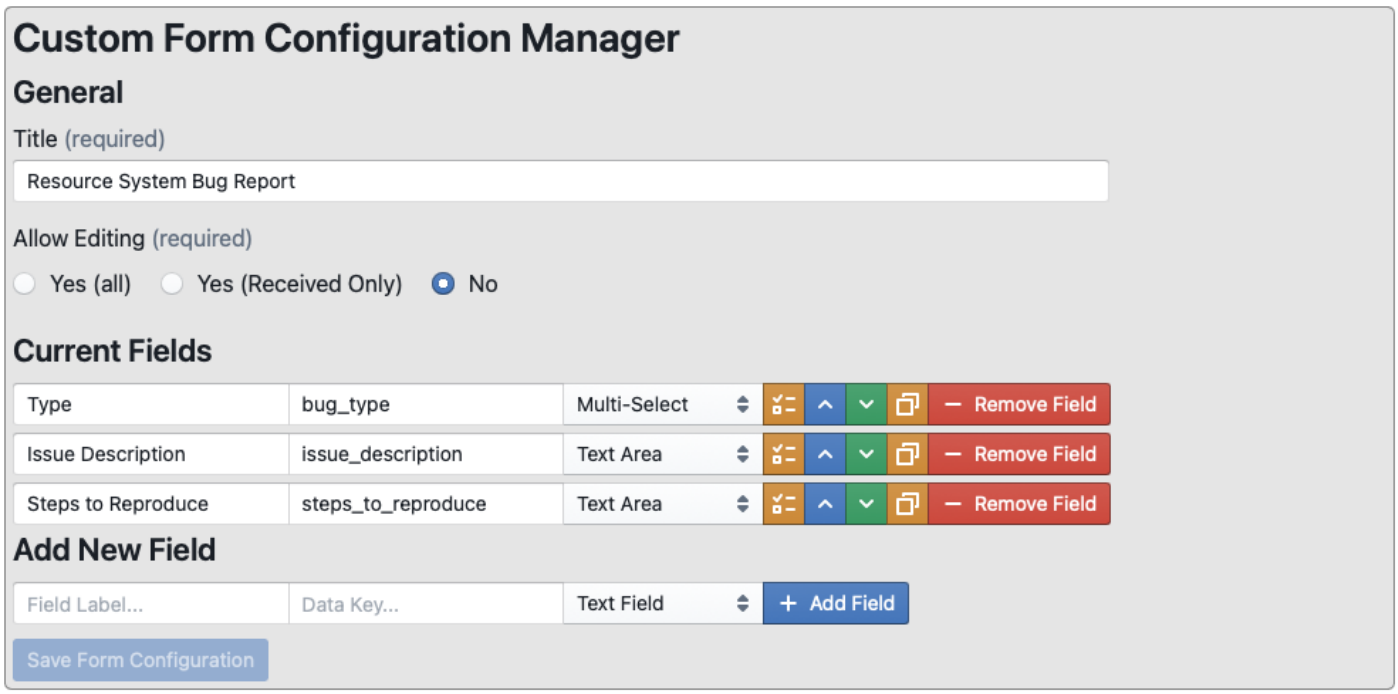
University of Utah Core Labs

Resource System Form Action - sign

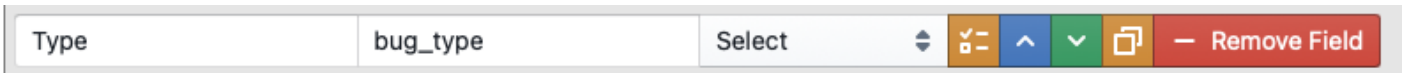
Form 49 Already Signed

Custom Form Configuration Overview

Custom data collection forms can be configured to collect any desired data including digital signatures from submitters.



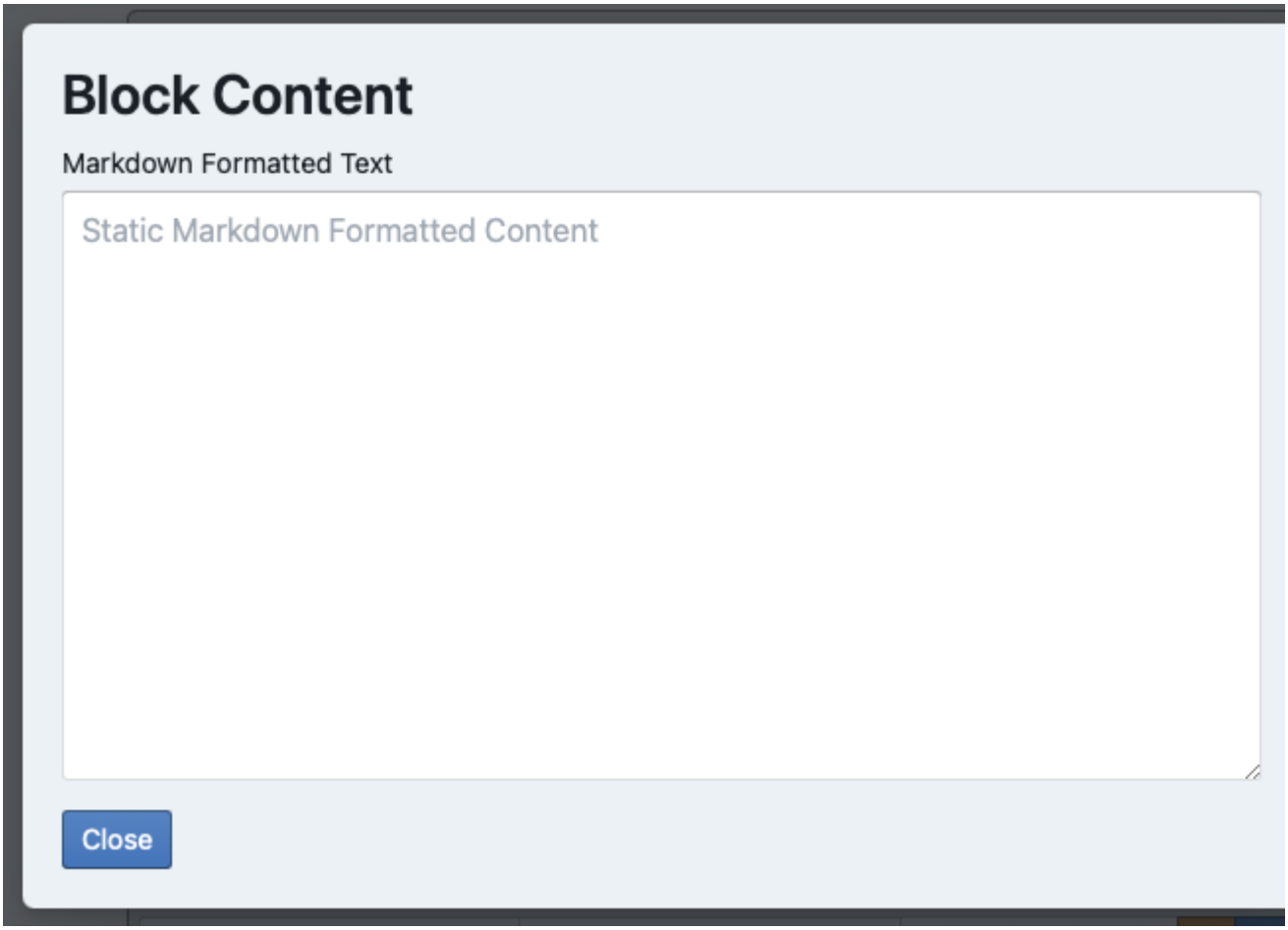
1. **Title** - The title of the form
2. **Allow Editing**
    1. **Yes (all)** - Allow users to edit form submissions after submission
    2. **Yes (Recieved Only)** - Allow users to edit form submission as long as they are in the "Received" state
    3. **No** - Disallow form editing after submission
3. **Current Fields** - Control and edit the forms for this data collection form



1. **Label Field** - Used to set the name of the field
2. **Data Key Field** - Defines the name of the storage variable. Should be unique across all fields
3. **Field Type Selector**
    - **Markdown Block** - Display a markdown formatted section of text
    - **Text Field** - Single Line Text Field

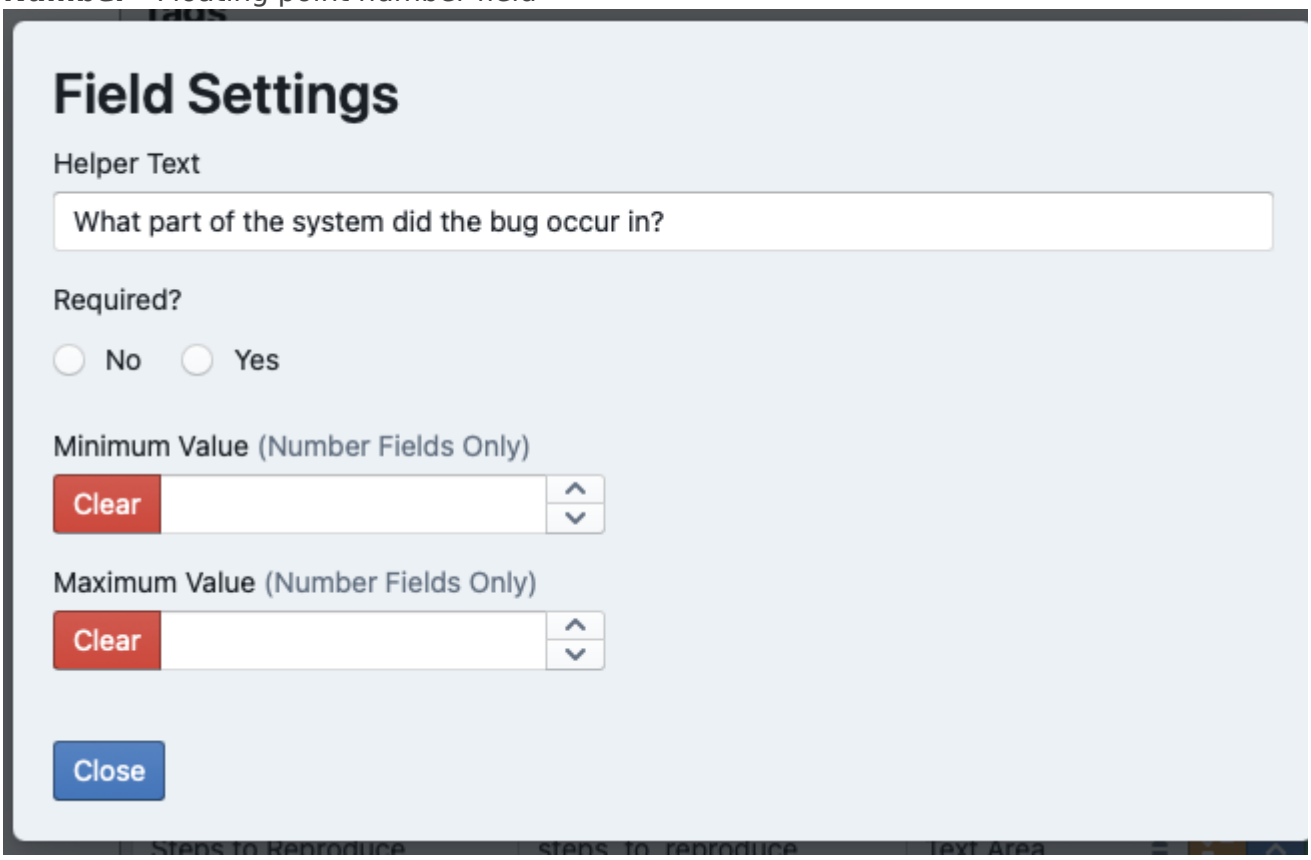
- **Text Area** - Multi-line text field
- **Number** - Floating point number field
- **Select** - Single Item select
- **Multi-Select** - multiple item select
- **Section Divider** - Section Divider with or without title
- **Signature Block** - Email target for signature request

4. **Field Details/Config Button** - Displays field type configurations
    - **Markdown Block**



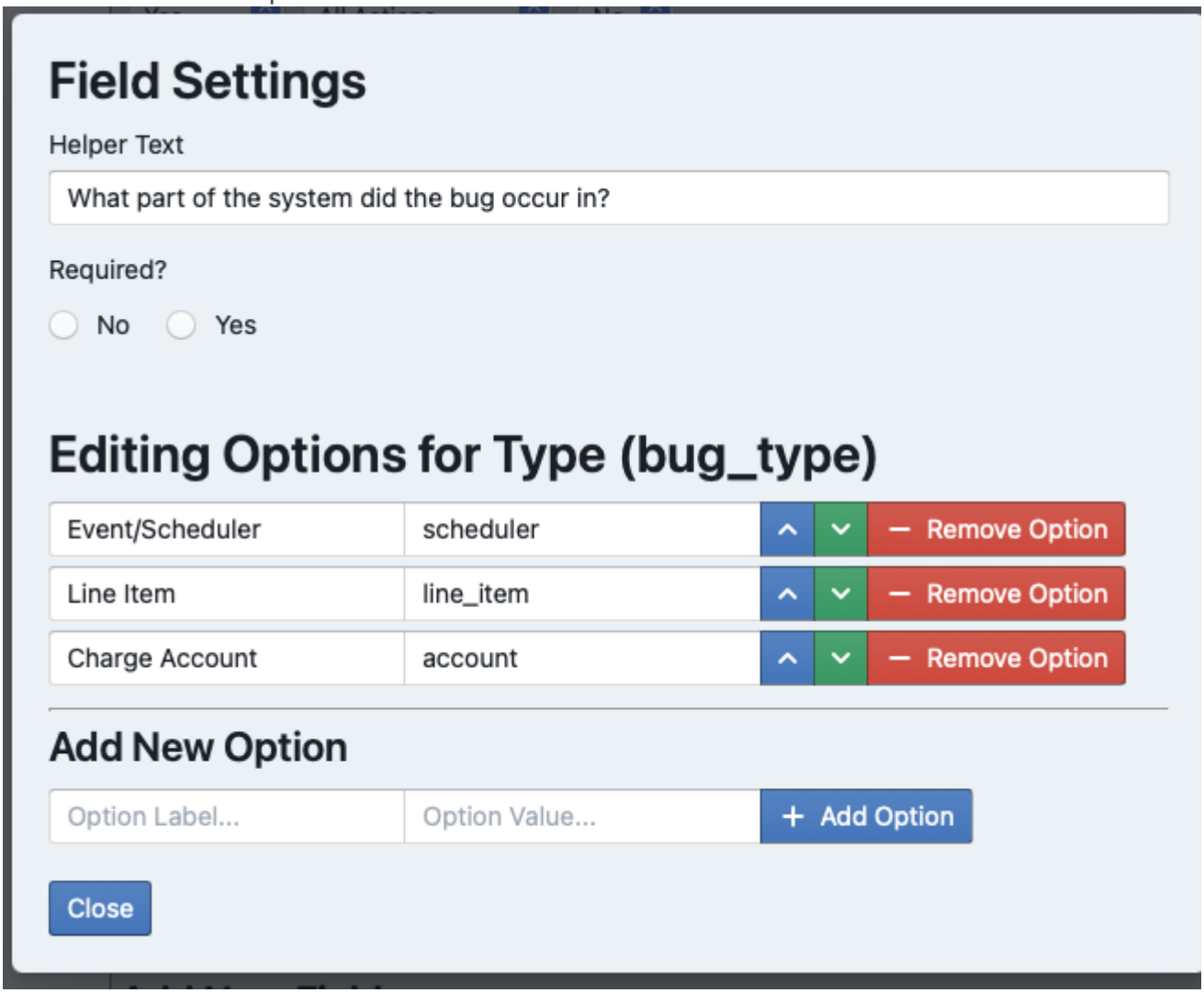
    - **Text Field** - Single Line Text Field
    - **Text Area** - Multi-line text field

- **Number** - Floating point number field

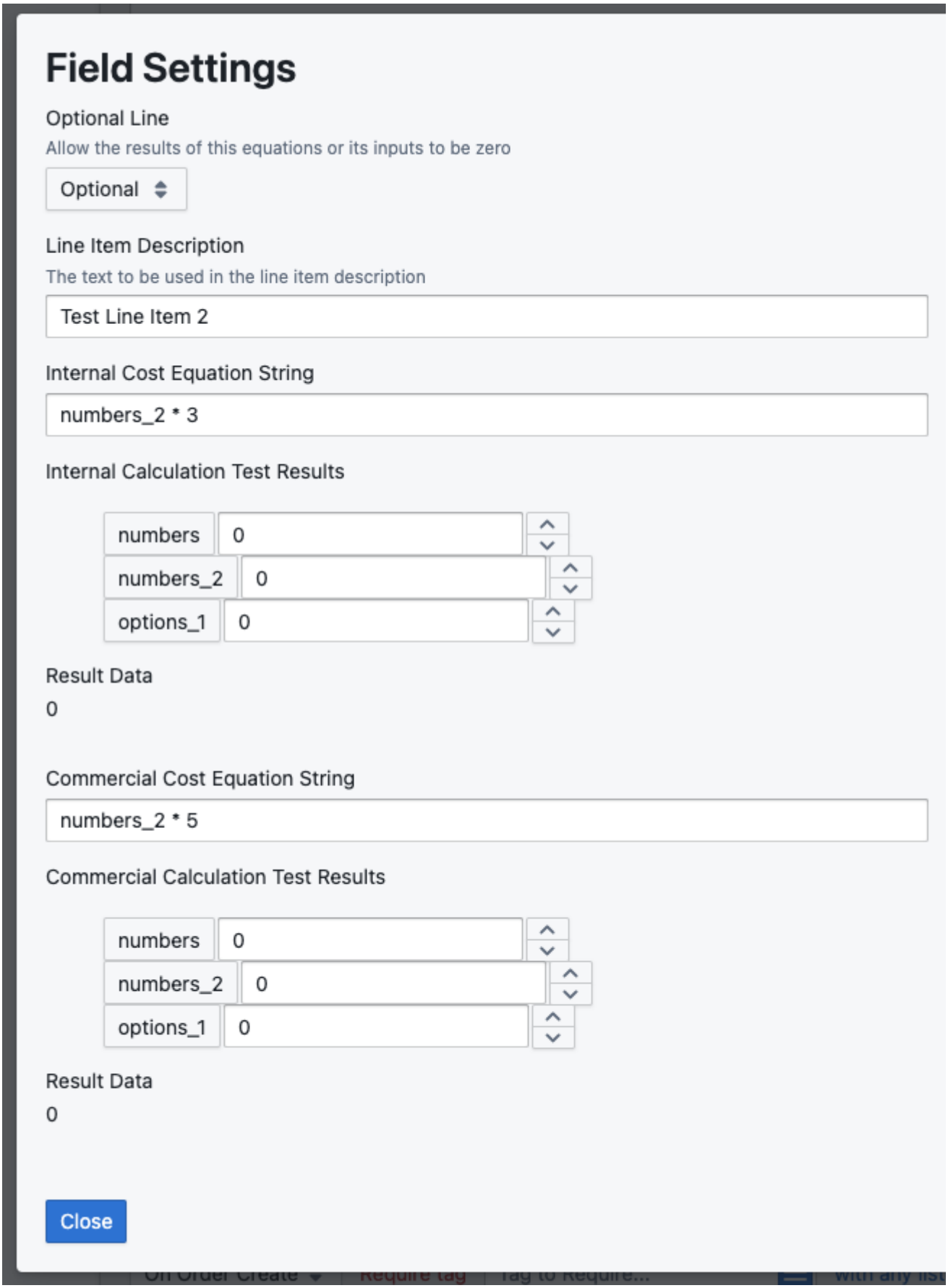


- **Select** - Single Item select

- **Multi-Select** - multiple item select



- **Section Divider** - Section Divider with or without title
- **Signature Block** - Email target for signature request
- **Duration (Time)** - Time Only Duration Entry Field
- **Charge Calculation** - Generate a line item charge based on a given set of calculations from other fields in the form



5. **Move Field Up** - Alters display position of field
6. **Move Field Down** - Alters display position of field
7. **Copy Field Button**
8. **Remove Field Button**

Charge Calculation Fields

Charge calculation fields represent fields that use other fields as inputs to generate a line item order upon order submission. Charge calculation fields may be either optional or required. Fields marked as optional may be submitted with 0 or undefined/null values and the results will be ignored/dropped if invalid resulting in no line item will be created for that field. Required fields will need to have a valid final value prior to submission. Forms will generate 1 line item in the order per valid charge calculation field result.

Valid input field types for Charge Calculation Fields include the following field types:

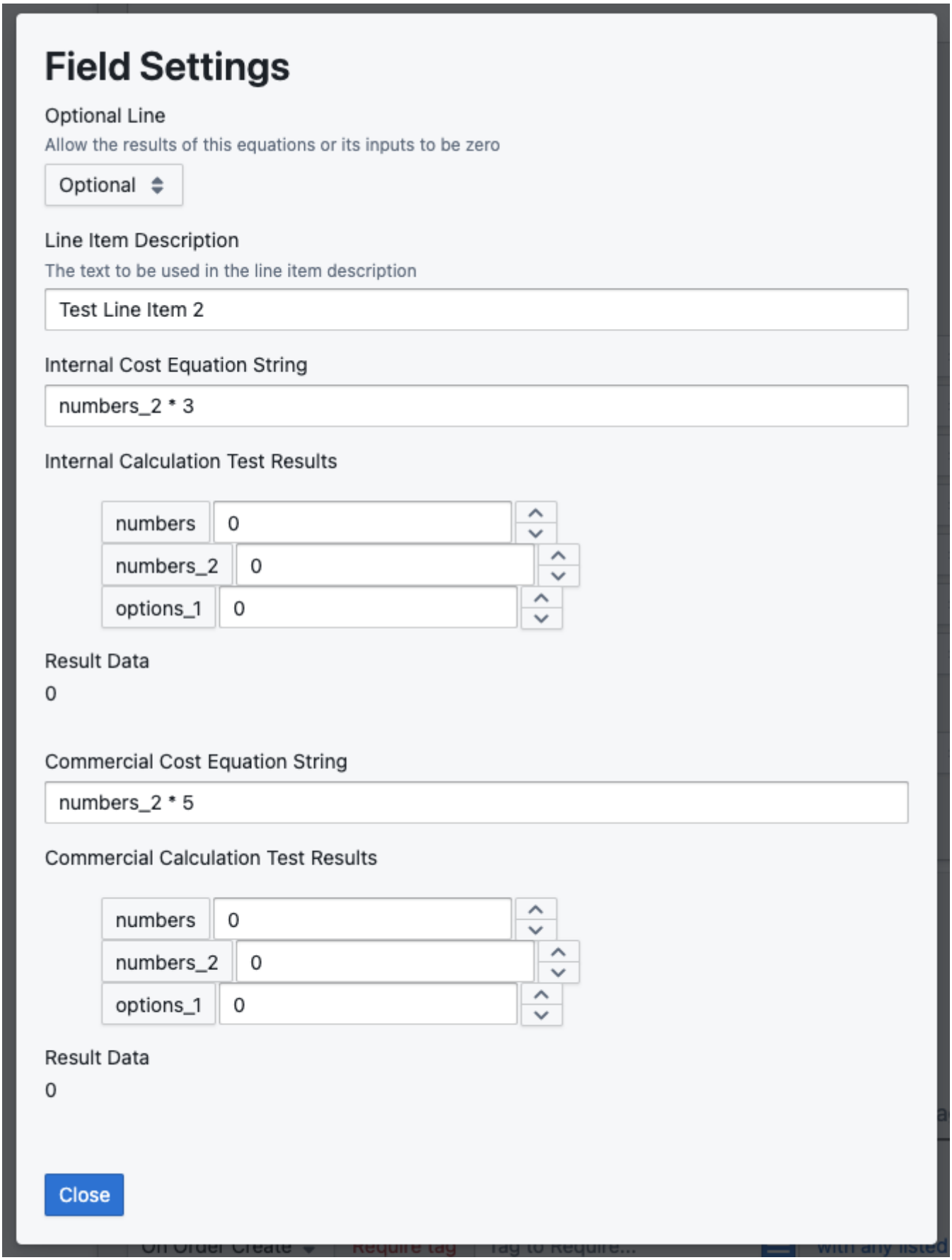
- Number
- Dropdown
- Select

Dropdown and Select field options MUST be valid parse-able floating point values. Invalid values will result in an error message (See: https://developer.mozilla.org/en-US/docs/Web/JavaScript/Reference/Global_Objects/parseFloat). Dropdown/Select values MUST take the format of either a number OR "<select_value>@<value_floating_point_number>".

Ex: "gold@123.45"

Managers may test numerical values in the the "Test Results" section to observe field calculation results behavior. All available fields with valid types will be listed as inputs in the test results section. For additional information on the math engine used for handling the equation strings see https://mathjs.org/

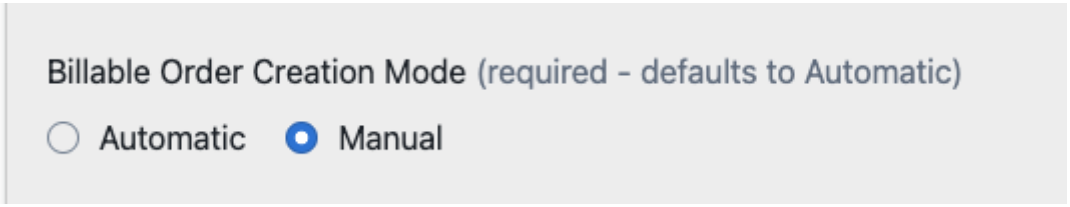
> Note that both an Internal and Commercial Cost Equation are required for proper functionality.



If a required charge calculation is missing an input or generates a negative/null result value the field will generate an error message and the form will be un-submittable with "(Invalid/Missing Fields)" as the button message.

Test Line Item - $ 0.00
Charge Total Error - Equation Result has generated a zero or negative number. Zero or negative results are not allowed on required charges (Required)

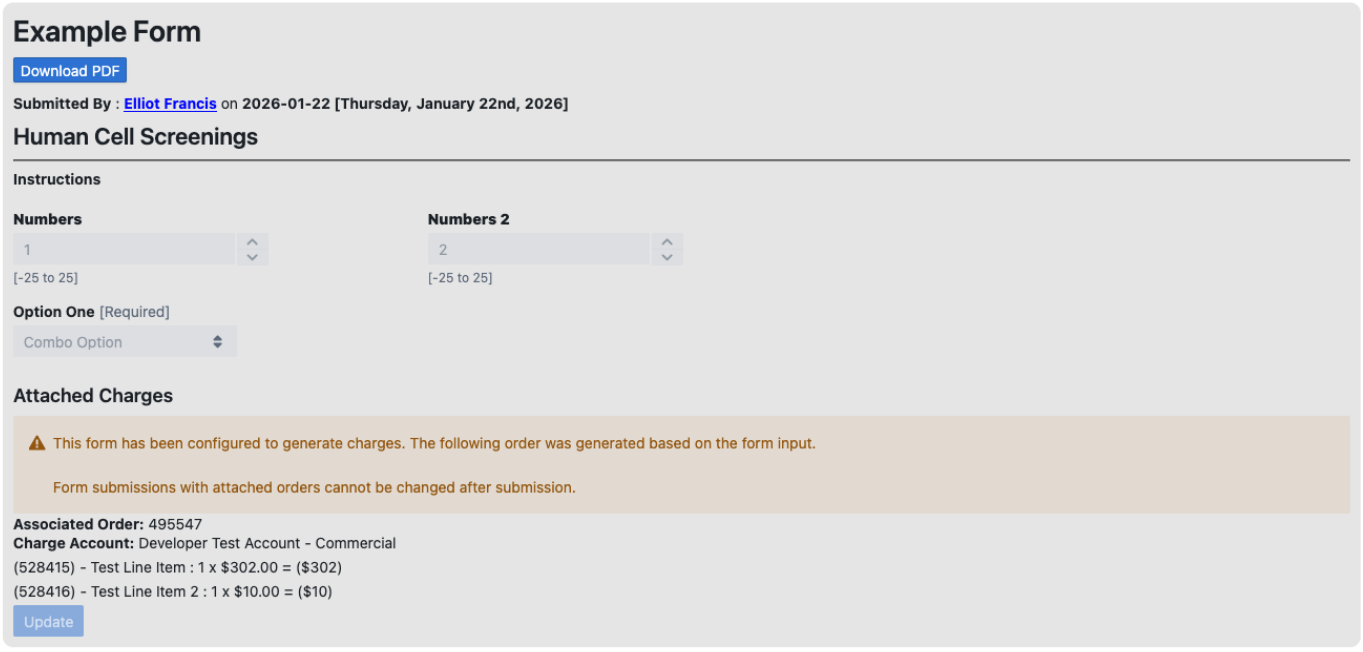
Forms with Charge Calculations may be configured to automatically generate new orders on submission OR to require manual review after the form is submitted.

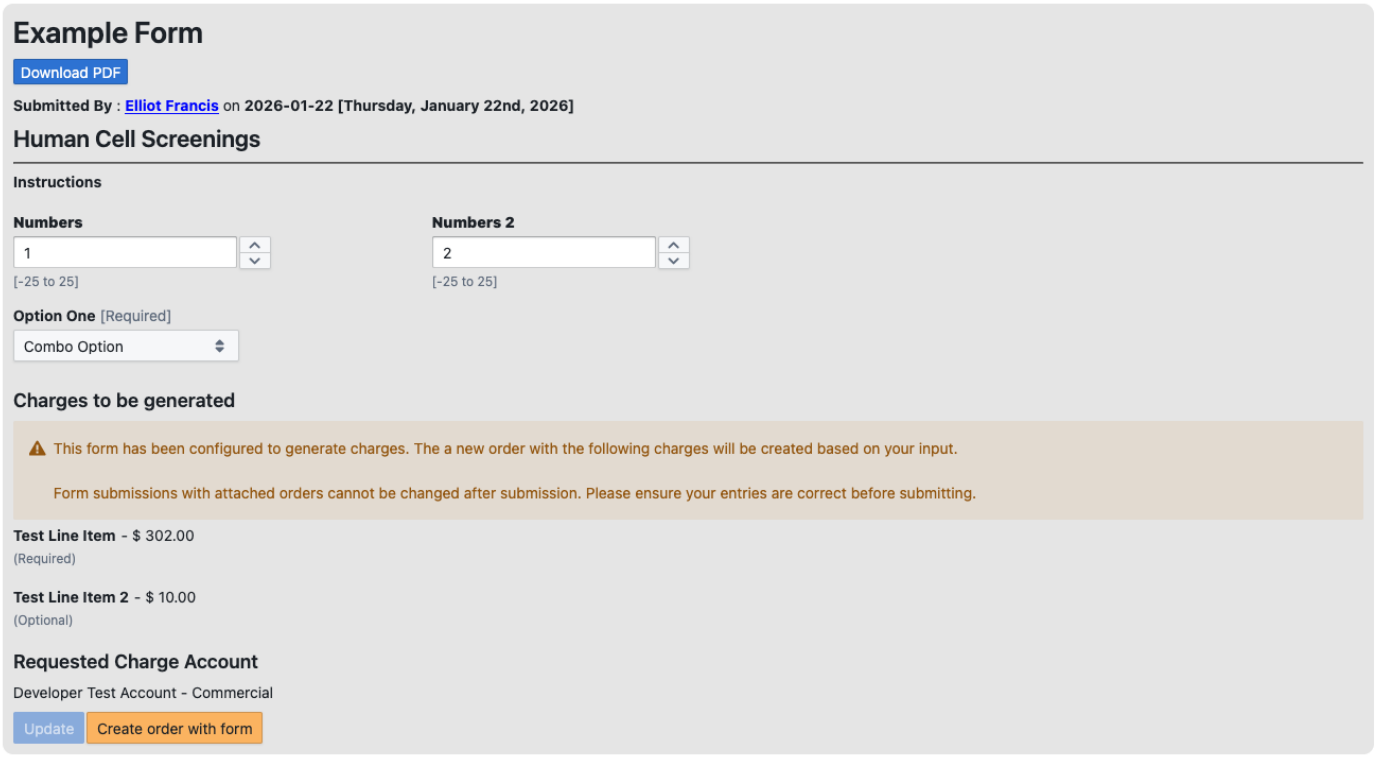


> Form submissions with orders attached to them will have their input fields DISABLED from further editing. Processing status can still be adjusted but inputs will be disabled. Do not create an order for a form submission unless you are sure the inputs are correct.

Filter for value...

ID	Service	Submitter	Form	Status	Order	Received
4708	Example Form	Elliot Francis	Example Form	received	Chargeable Lines, No Order	2026-01-22 10:45
4707	Example Form	Elliot Francis	Example Form	received	495547	2026-01-22 10:45
4706	Example Form	Elliot Francis	Example Form	received	495546	2026-01-21 09:54
4705	Example Form	Elliot Francis	Example Form	received	495545	2026-01-21 09:49
4704	Example Form	Elliot Francis	Example Form	received	495544	2026-01-21 09:49





Users submitting forms with charge lines will be required to select an associated charge account. Mangers may change the target field AFTER order creation through the normal approval process for orders.

