

Custom Form Configuration Overview

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

Custom Form Configuration Manager

General






















Title (required)

Resource System Bug Report




Allow Editing (required)

☐ Yes (all) ☐ Yes (Received Only) ☒ No

Current Fields

| | | | | | |
|--------------------|--------------------|--------------|---|--|---|
| Type | bug_type | Multi-Select |   |     |  |
| Issue Description | issue_description | Text Area |   |     |  |
| Steps to Reproduce | steps_to_reproduce | Text Area |   |     |  |

Add New Field

| | | | | |
|----------------|-------------|------------|---|--|
| Field Label... | Data Key... | Text Field |   |  |
|----------------|-------------|------------|---|--|

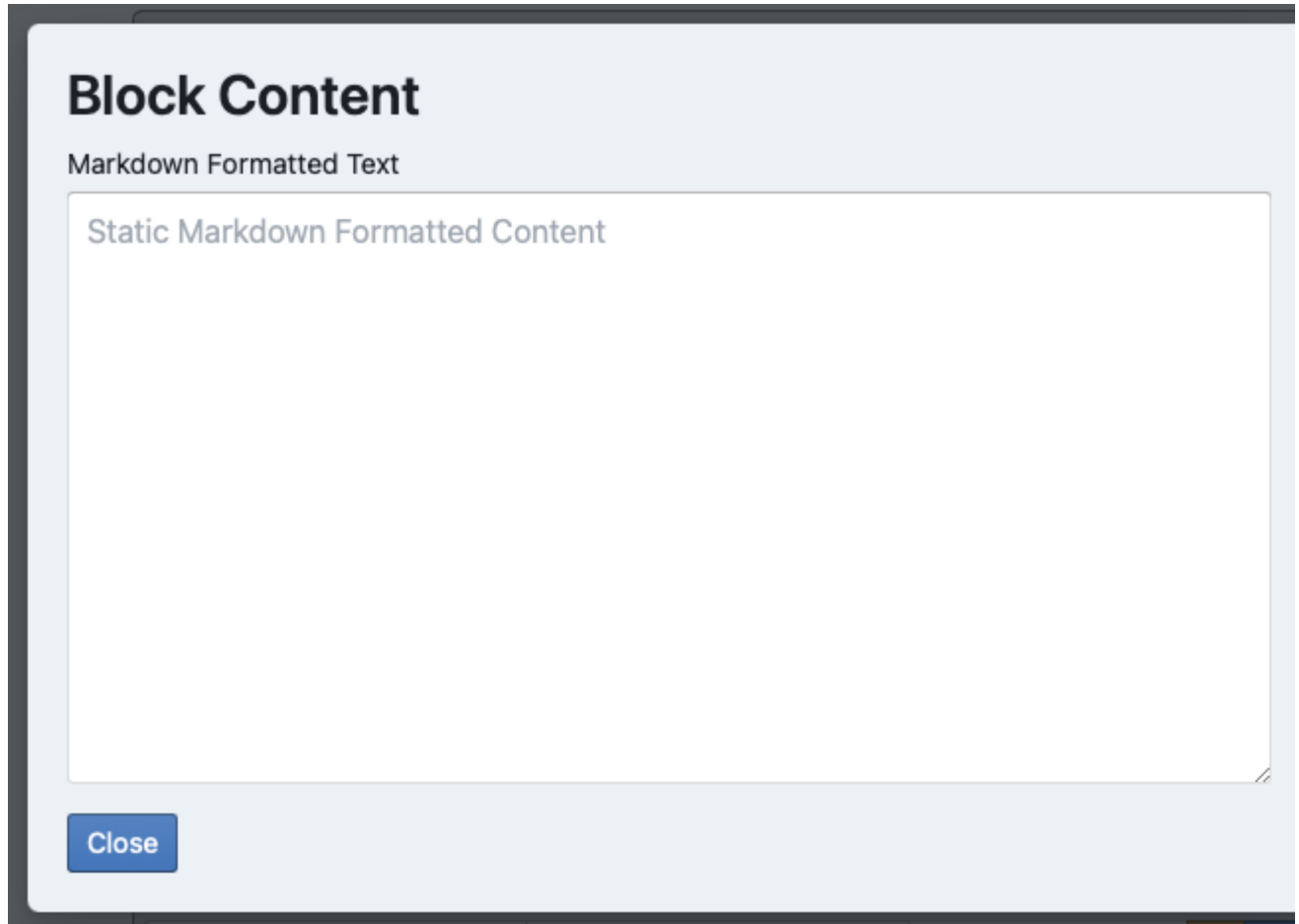
Save Form Configuration

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

| | | | | | | | |
|------|----------|--------|---|---|--|---|--|
| Type | bug_type | Select |  |  |  |  |  Remove Field |
|------|----------|--------|---|---|--|---|--|

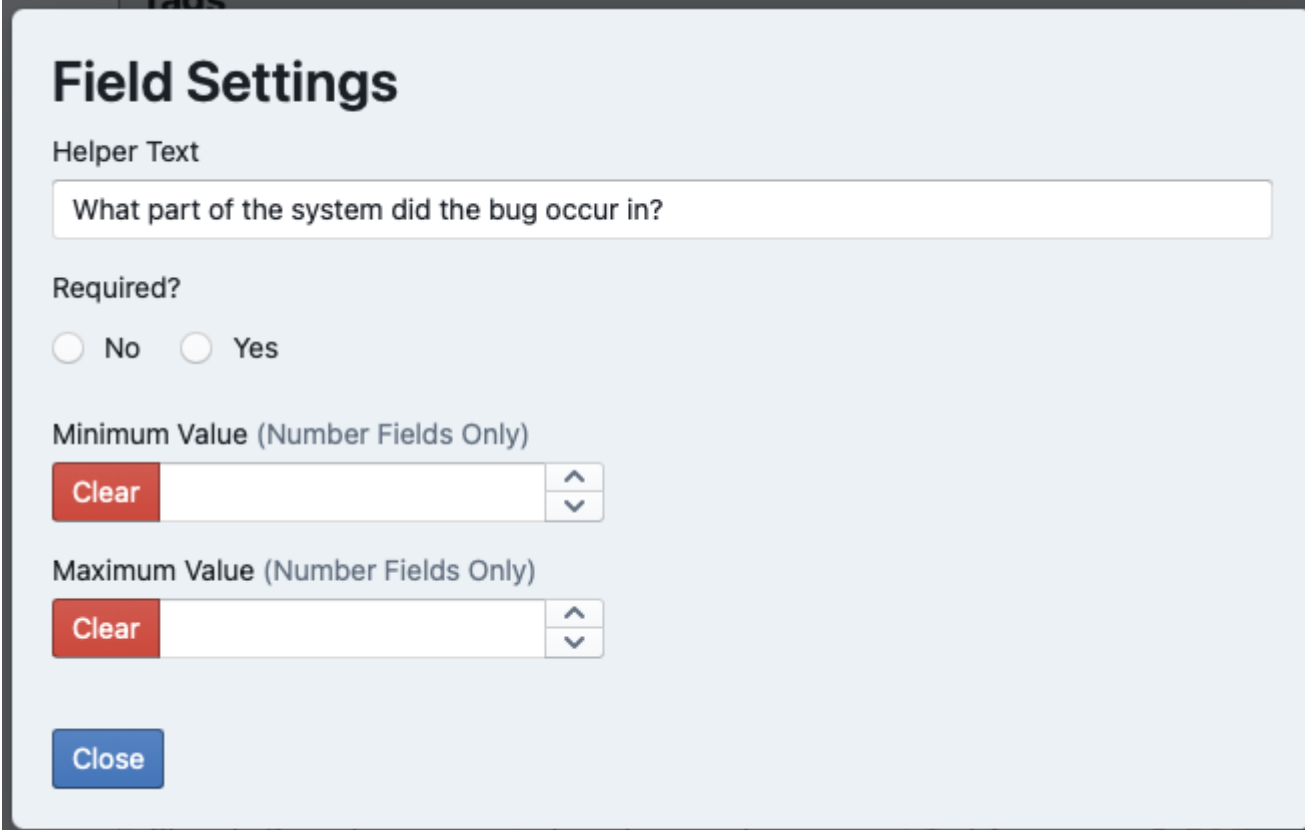
1. **Label Field** - Used to set the name of the field
2. **Data Key Field** - Defines the name of the storage variable. Should be unique across all fields
3. **Field Type Selector**
 - **Markdown Block** - Display a markdown formatted section of text
 - **Text Field** - Single Line Text Field

- **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



The image shows a 'Field Settings' dialog box with a light blue background. At the top, the title 'Field Settings' is in a large, bold, black font. Below the title, the label 'Helper Text' is followed by a text input field containing the text 'What part of the system did the bug occur in?'. Underneath, the label 'Required?' is followed by two radio buttons: 'No' and 'Yes'. Below the radio buttons, there are two sections for numerical constraints. The first section is labeled 'Minimum Value (Number Fields Only)' and contains a red 'Clear' button, a text input field, and a small button with up and down arrows. The second section is labeled 'Maximum Value (Number Fields Only)' and contains a red 'Clear' button, a text input field, and a small button with up and down arrows. At the bottom left of the dialog is a blue 'Close' button. The dialog is shown over a blurred background of a web application interface.

Field Settings

Helper Text

What part of the system did the bug occur in?

Required?

☐ No ☐ Yes

Minimum Value (Number Fields Only)

Clear ^ v

Maximum Value (Number Fields Only)

Clear ^ v

Close

- **Select** - Single Item select

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

Field Settings

Helper Text

What part of the system did the bug occur in?

Required?

☐ No ☐ Yes

Editing Options for Type (bug_type)

| | | | |
|-----------------|-----------|-----|-----------------|
| Event/Scheduler | scheduler | ^ v | — Remove Option |
| Line Item | line_item | ^ v | — Remove Option |
| Charge Account | account | ^ v | — Remove Option |

Add New Option

| | | |
|-----------------|-----------------|--------------|
| Option Label... | Option Value... | + Add Option |
|-----------------|-----------------|--------------|

Close

- **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**

Revision #3

Created 1 April 2021 15:49:03 by Elliot Francis

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