

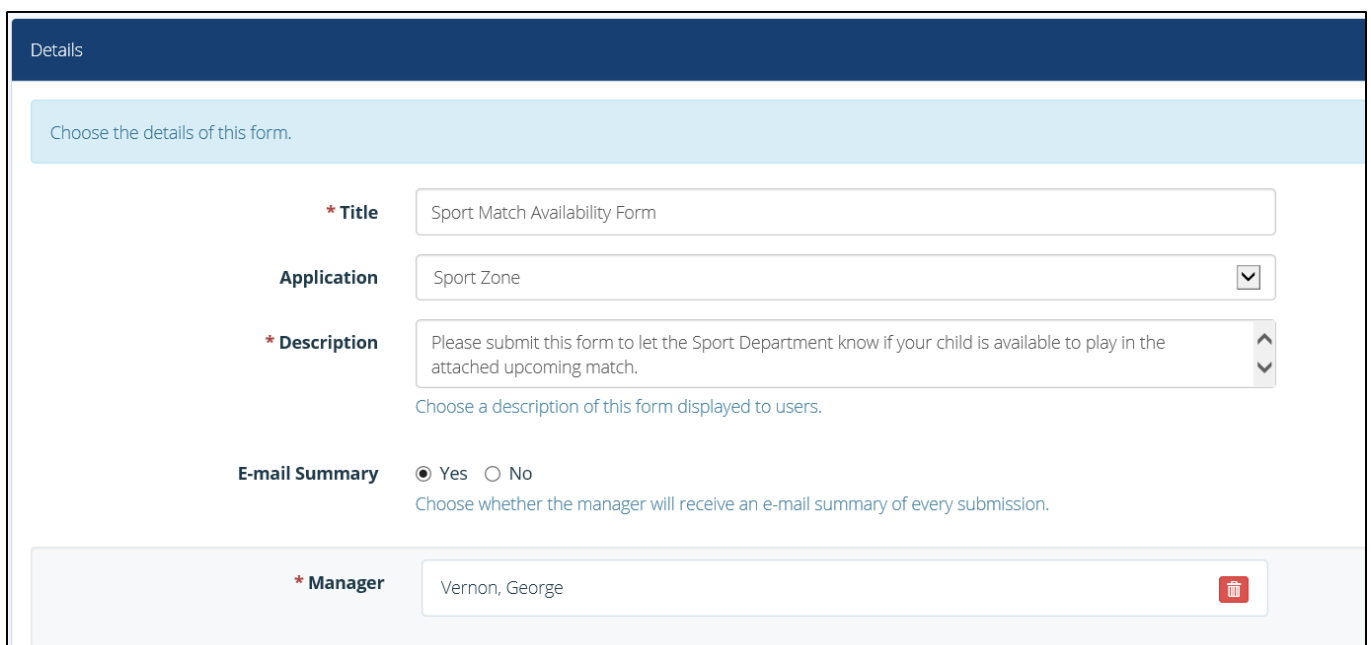
How to create a Workflow Form

Workflow forms are created for use in specific applications. For example, a permission form can be created for the Sports Zone, which parents must fill out when their child is selected to play in a sports match.

Forms created in the 'Workflow' section of the Form Zone are only available for completion through the applications they are assigned to.

How to create a Workflow Form

1. Ensure you are logged into the Staff Message Centre.
2. Click the 'Workflow' panel list item in the 'Form Zone' on the Dashboard. The 'Workflow' form library page will load.
3. Click '+New'. The 'New Form' page will load.
4. In the 'Details' section, enter the following:
 - a. The title of the form.
 - b. The application the form should be assigned to.
 - c. A description of the form.
 - d. Select whether an email summary of each submission should be sent to the form's manager.
 - e. Select the form's manager by entering details of a member of staff into the search field, and clicking search. Click 'Select Manager' when the correct manager has been chosen.



The screenshot shows the 'Details' section of a form creation interface. It features a dark blue header with the word 'Details' in white. Below the header is a light blue box with the text 'Choose the details of this form.' The form fields are as follows:

- * Title:** A text input field containing 'Sport Match Availability Form'.
- Application:** A dropdown menu with 'Sport Zone' selected and a downward arrow icon.
- * Description:** A text area containing 'Please submit this form to let the Sport Department know if your child is available to play in the attached upcoming match.' Below the text area is a link that says 'Choose a description of this form displayed to users.'
- E-mail Summary:** Radio buttons for 'Yes' (selected) and 'No'. Below is a link that says 'Choose whether the manager will receive an e-mail summary of every submission.'
- * Manager:** A text input field containing 'Vernon, George' and a red trash icon to the right.

The new form 'Details' section

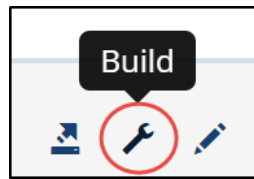
5. Click 'Submit' when all details have been correctly entered.

This process will have created the shell of your form. You now will need to 'build' the form and create the question fields for users to fill in.

How to build a Workflow Form

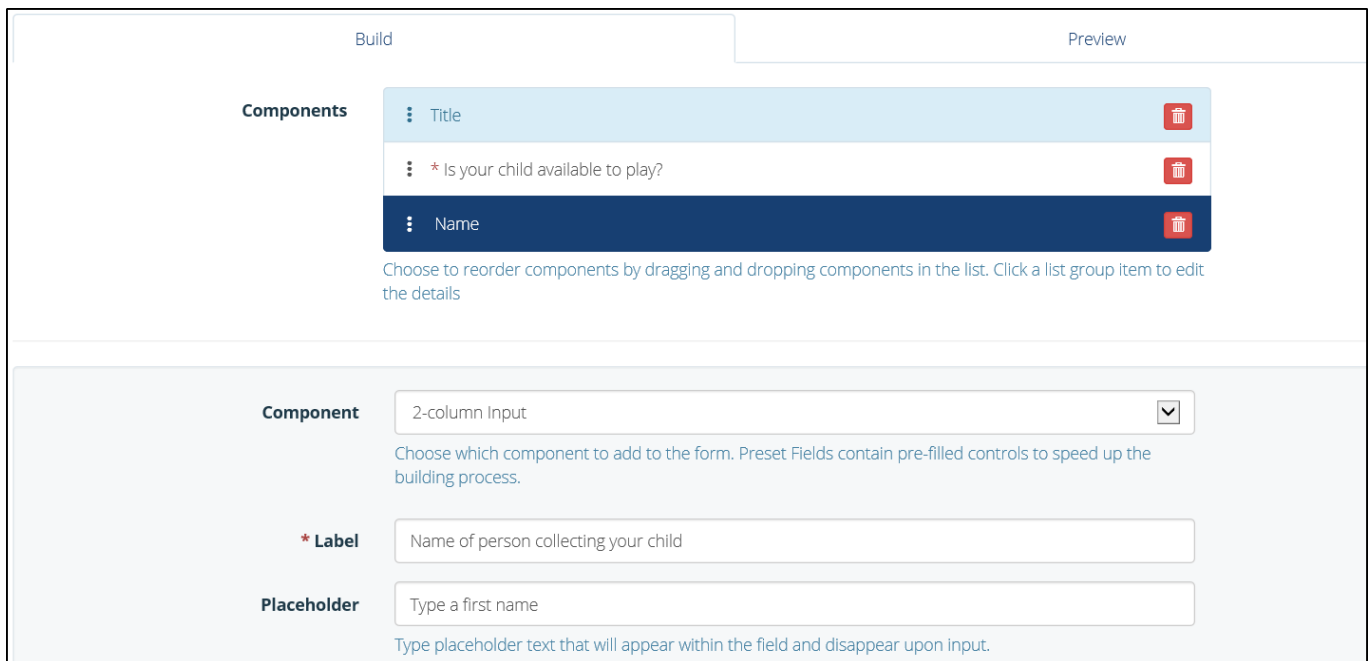
Once you have completed the basic setup of your 'Workflow' form, the page will redirect to the forms 'Library' page. If you are returning to the Staff Message Centre to build a form, click the 'Workflow' panel list item in the 'Form Zone' on the Dashboard.

1. A list of created form titles will display. Click the 'Build' icon on the right-hand side.



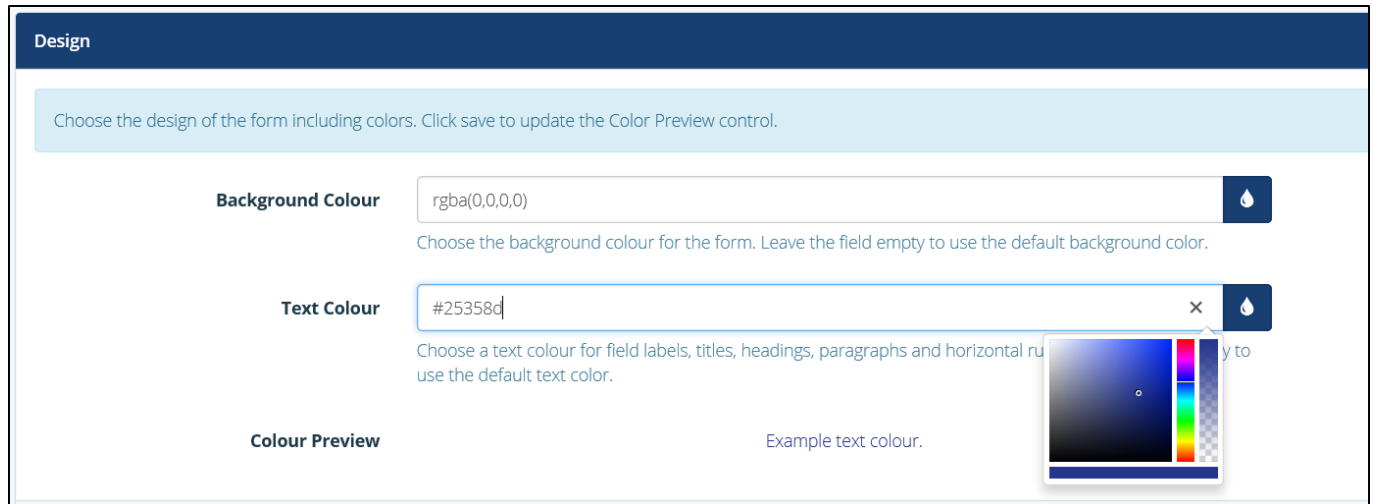
The 'Build' form icon

2. Forms are made of 'Components', which can be selected from the 'Components' drop-down menu in the 'Fields' section. Form 'Components' are divided into the following sections:
 - a. Text/Headings.
 - b. Single Column Fields.
 - c. Multiple Column Fields.
 - d. Preset Fields.

A screenshot of the 'Build' form interface. At the top, there are two tabs: 'Build' (selected) and 'Preview'. Below the tabs, there is a 'Components' section with a list of three items: 'Title', '* Is your child available to play?', and 'Name'. Each item has a red trash icon on the right. Below the list, there is a note: 'Choose to reorder components by dragging and dropping components in the list. Click a list group item to edit the details'. Below this, there is a 'Component' dropdown menu with '2-column Input' selected. Below the dropdown, there is a note: 'Choose which component to add to the form. Preset Fields contain pre-filled controls to speed up the building process.' Below this, there is a '* Label' field with the text 'Name of person collecting your child'. Below the label, there is a 'Placeholder' field with the text 'Type a first name'. Below the placeholder, there is a note: 'Type placeholder text that will appear within the field and disappear upon input.'

The Build Form 'Components' section

3. Select a 'Component' from the drop-down menu, and fill in the necessary fields. Once completed, click 'Add Component'. Click 'Save' when your form components have been added.
4. Scroll down to the 'Design' section to alter the look of the form. The form background colour, and text colour can be edited. Click the colour drop symbol to display the colour picker. The 'Colour Preview' field will display any changes made to the background and text.



The 'Design' section

5. Click 'Save' when your form is complete.

How to publish a form

When your form is complete, it will need to be published in order for users to complete and submit their responses.

1. In the 'Form Zone', click 'Library' within the 'Workflow' menu option.
2. Tick the tick-box on the left-hand side of the appropriate form.
3. Click the 'Bulk' icon, and click 'Publish Form'. Your form will now be available in the application you have assigned it to.

Once complete and published, your form will appear in the application you have assigned it to.