User Manual for Form Design in Resultmaker Process Platform™

Document version: 6.2

Revision: 06-06-2016

RESULTMAKER

This is a user manual for form design with Resultmaker Process Platform™. It helps the user to understand the concepts of the design tool *Resultmaker Process Designer* at a high level, focusing on the *design of forms*.

If you are looking for design of processes and decisions visit the '*User Manual for Process Design in Resultmaker Process Platform™*' on http://partner.resultmaker.com.

Follow the instructions in text and illustrations, and when you are through, you will know how to build a form along with knowing the concepts.

Targeted version is: Resultmaker Process Platform 6.2 R3

Table of Contents

Modifying layouts in Form Designer 60

Maximizing user-friendliness 66

Learning to use Form Designer

About the program
Resultmaker Process Designer™ is the software used for designing and maintaining your business processes. It is a part of Resultmaker Process Platform™ – the complete process suite for designing, maintaining and executing forms and workflows – the two elements your processes consist of.

A process consists of a workflow with at least one but often quite a few acitivities. An activity can be represented by a form that an end user can fill out.

An activity could also be signing data, or it could be an activity carried out by a system – for instance executing a payment.

Resultmaker Process Designer™ consists of a *Form Designer*, a *Workflow Designer* and an *Advanced Workflow Designer*.

Resultmaker Process Designer™ is designed to make it possible for non-developers to design and maintain forms and workflows. The idea is first of all to make the business more independent of IT, and make it possible to maintain their processes and apply changes in the organization without costly and timeconsuming IT projects.

In the following we will focus on how to create forms using Form Designer.

Creating forms and workflows
Form Designer is a tool for creating electronic forms (also called e-forms). With Form Designer, all you have to concentrate on is setting up a form. When the form is finished, it can be saved to the Process Platform server and attached to one or more workflows. The workflows can then be accessed by your users, who fill out the form and complete the workflow online.

Form Designer helps you help your users
When you create a form, one of your goals should be to give users all the information they need to fill out the form as easily and accurately as possible. This manual includes practical tips and advice to optimize the usability of your forms.

Digital signatures with Form Designer
Electronic forms created with Form Designer can be set up for digital signature. For more information, please contact Resultmaker A/S.

What's in the User Manual
The Form Designer User Manual consists of several parts:

First the "Tutorial and basic information" section is built up around a short exercise that shows you how to create and publish a typical form. At the same time, it introduces many of the basic concepts and procedures you will need in Form Designer.

We highly recommend that you go through the tutorial section before starting to create your own forms.

Then the "The building blocks of Form Designer" section will systematically explain the various design elements and properties and how to use them.

Later in the "Creating layouts in Form Designer" section it will be explained how to place and modify elements on the page to create the layout you want.

Finally the "Maximizing user-friendliness" section contains a number of useful tips for building user-friendly layouts and writing well-functioning texts. Following its advice will help ensure that users find your workflows easy to understand and deal with.

Help

Form Designer contains an extensive online Help file.

Note that the file also includes information on topics that are not part of the Form Designer level of Process Platform.

To access Help

- *Either:* Click on an item in the form window and press *F1*. This will take you directly to the Help page for the selected item.
- *Or:* Select *Contents, Index* or *Search* from the *Help* menu and navigate to the desired topic.
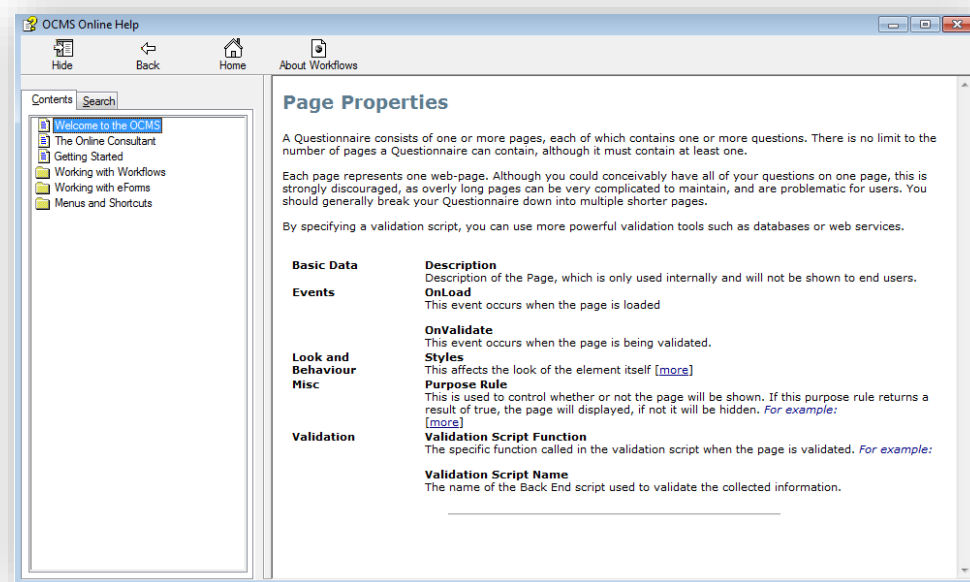
Figur 1: Form Designer has an extensive online Help file. To open it, check that the form window is active and press F1. Or select Contents, Index or Search from the Help menu.

Tutorial and basic information

What you can do with Form Designer

Form Designer is part of Process Designer, which is Process Platform's design tool. In its full form, Process Designer can be used to build both simple and complicated forms and workflows.

What you can learn from this chapter

This chapter introduces you to many of the basic concepts of eForm -Designer. At the same time, it takes you through the following easy operations that demonstrate how to create a fully functional workflow:

    A.   Open one of the sample forms supplied with the program.
    B.   Save the form under a different name.
    C.   Modify the form.
   D.   Create a workflow that goes with corresponding form.

To move quickly through the tutorial, follow the instructions marked DO THIS.

General tips on navigation and shortcuts

- Navigation in Form Designer follows Microsoft Windows standards.
- The availability of certain commands in the menus at the top of the screen may depend on which window is active. Certain functions can only be carried out when the form window is the active window.
- Right-clicking on an element in the form window will display commands that are relevant for that element. Some commands are only available this way.
- Some useful shortcuts are:
- *Ctrl*+shift+*N*:   Creates a new, blank form.
- *Ctrl*+shift+*O*:   Lets you open an existing form.
- *Ctrl*+*S*: Saves the form you are working on (provided the form window is active).
- *Ctrl*+Z: Undo.
- Ctrl+Y: Redo.
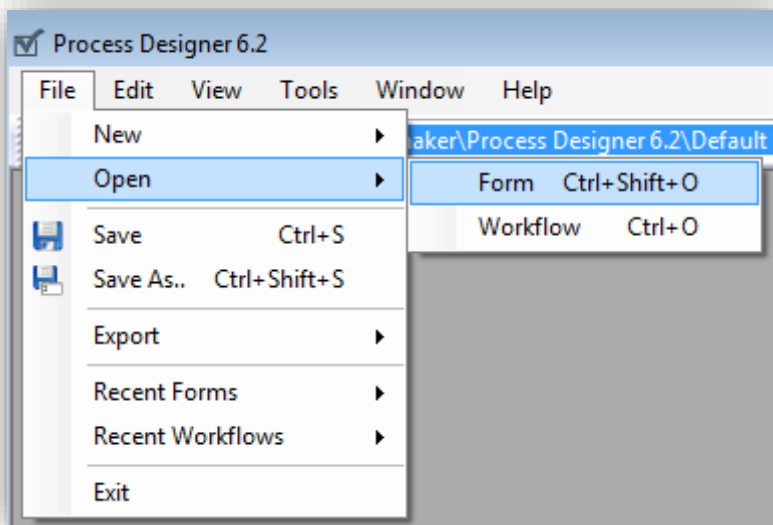
Form Designer includes a few sample forms that you can use as a basis for exploring the program or creating your own e-forms.

To open a sample form select Open > Form in the File menu.
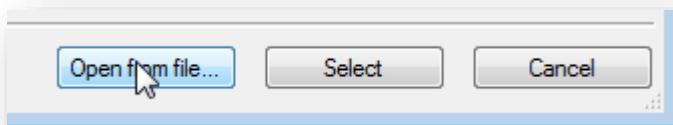
Select Open from file to browse your system for the Sample form that came with the software.

Select Sample form named: SamplevariousElements

A: Start up the program and open a sample form

Using the sample form as a template

Form Designer includes some sample forms that are pre-designed with content and layout. You can use these as a basis for getting to know the program (as we will do in this tutorial) or as templates that you can modify for quickly building your own solutions.

DO THIS: Start the Process Designer from the MS Windows' Start Menu. Select File > Open > Form in the File menu. Select Open from file to browse your system for the Sample form that came with the software. Select Sample form named: SampleVariousElements

To open Layout window for a given page, right-click on the page in the form window and select Layout
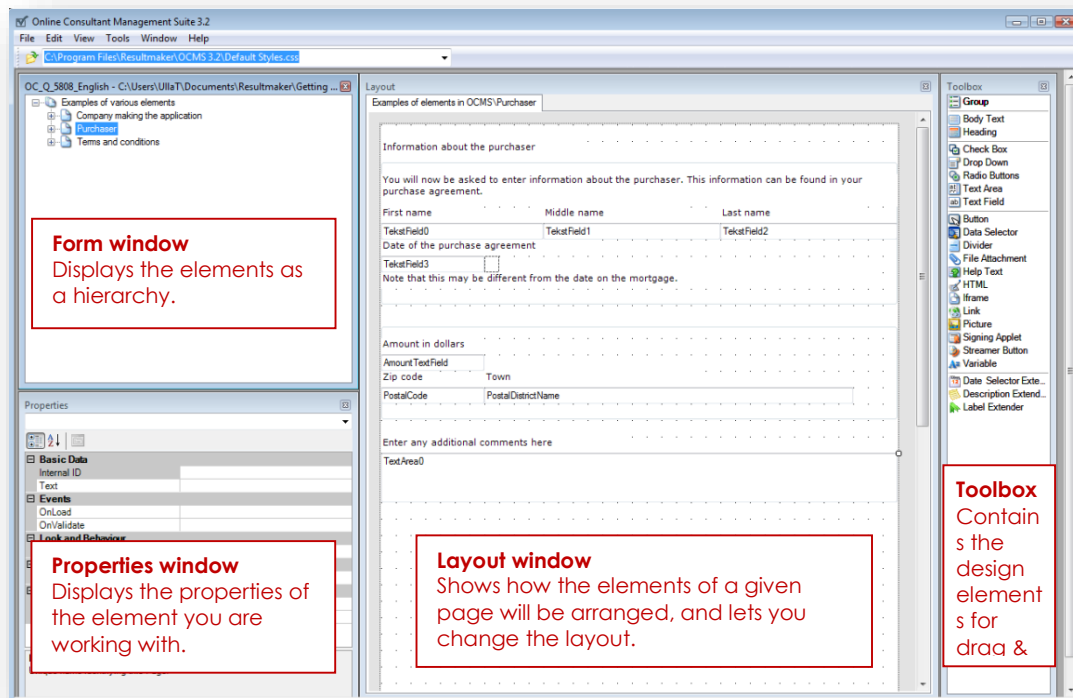
Form Designer has three working windows (form, Layout, and Properties) plus a Toolbox.

The working areas of Form Designer
The Form Designer interface includes a *Toolbox* as well as three windows you will be working in:

- Form.
- Layout.
- Properties.

DO THIS: Open the form, Layout and Properties windows as explained below and place all three windows where you want them on the screen.

- A window can be moved or resized by dragging it with the mouse as in other Windows programs.
- A suggested screen setup is to put the form window at top left, the Properties window below it and the Layout window filling up the right-hand side of the screen.

The form window

- **To open the form window**, select *New* (for a new form) or *Open* (to open an existing form) from the *File* menu.
- The form window is your main working window and represents the project you are working on. Closing the form window corresponds to closing a document in other Windows programs.
- The name of the form will appear as the title of the window.
- The form window displays the contents of the current form as a hierarchical tree structure. A form can include one or more pages. **Howeveer it is adviced to use new forms instead of pages, since pages are not visible for the end-user in the overall table of steps**. Pages will not be described in more details.

- To unfold a form hierarchy and view its contents, click on the "+" symbols. To collapse a node in the hierarchy, click on its "–" symbol.
- In the form window you can add, move and delete elements (this can also be done in the *Layout* window).
- The form window must be active for you to be able to save the form. Click anywhere in the window to activate it. Note that a star is displayed after the form name at the top of the window if you have made changes since the last time you saved the form.
- Right-clicking on an element in the form window opens a menu that may contain some commands not found elsewhere. If you get stuck when using Form Designer, try right-clicking. Or use *F1* to access the online Help file.
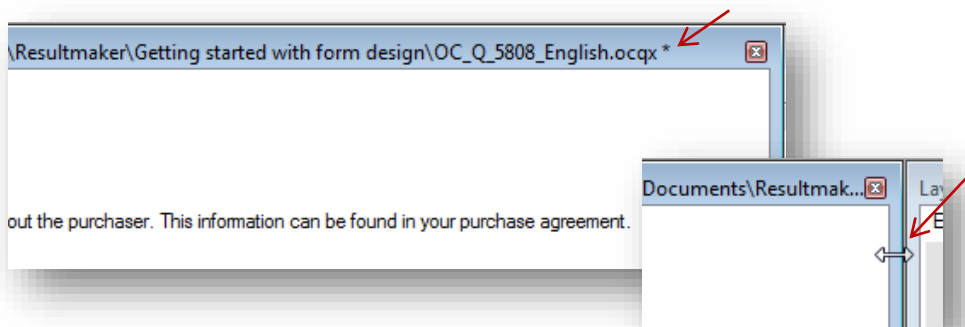
Unsaved changes are indicated by a star next to the form name at the top of the form window. If no star is displayed, the latest changes have been saved.

If the name of the form is long, you may need to drag the side of the window to view the star

The Layout window

- **To open the Layout window for a given page/form**, right-click on the page name in the form window and select *Layout*.
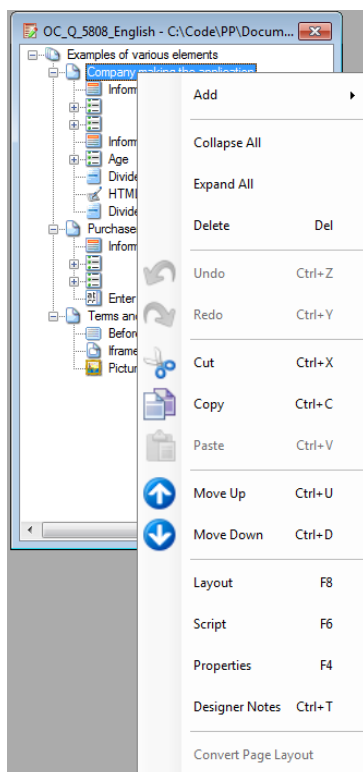
To open the Layout window for a page,
right-click on the page name and select Layout or press F8.

- You can add elements by dragging them -directly into the *Layout* window from the *Toolbox* (or by right-clicking in the form window).
- In the *Layout* window, you can use the mouse to resize elements and move them around to create the layout you want.
- You can delete an element by clicking on it in the *Layout* window and pressing *Delete*.
- For certain elements (*Text Field*, *Text Area*, *Check Box*, *Drop Down*, *Radio Button* og *Help Text*), the *Layout* window shows both the element itself and its label. The -label's name corresponds to the *Text* property in the element's *Properties* window. If the element is a *Text Field* or *Text Area*, its name corresponds to the *Internal ID* property.
- To act on an element and its label together, click on the element itself; to act on the label only, click on the label.
- The *Layout* window has a grid that elements snap to when you move them. This ensures that everything is kept in alignment.

The Properties window
- **To open the Properties window**, right-click on any element in the form window and select *Properties*. Or click anywhere in the form window and press *F4*.
- Each element in a form has its own properties. When you click on an -element in the form or *Layout* window, the *Properties* window displays the properties for that element, allowing you to review or edit them.
- If you click on a different element, the *Properties* window will automatically change to display that element's properties.
- For an explanation of the various properties, see "Building Blocks of Form Designer."

The Toolbox
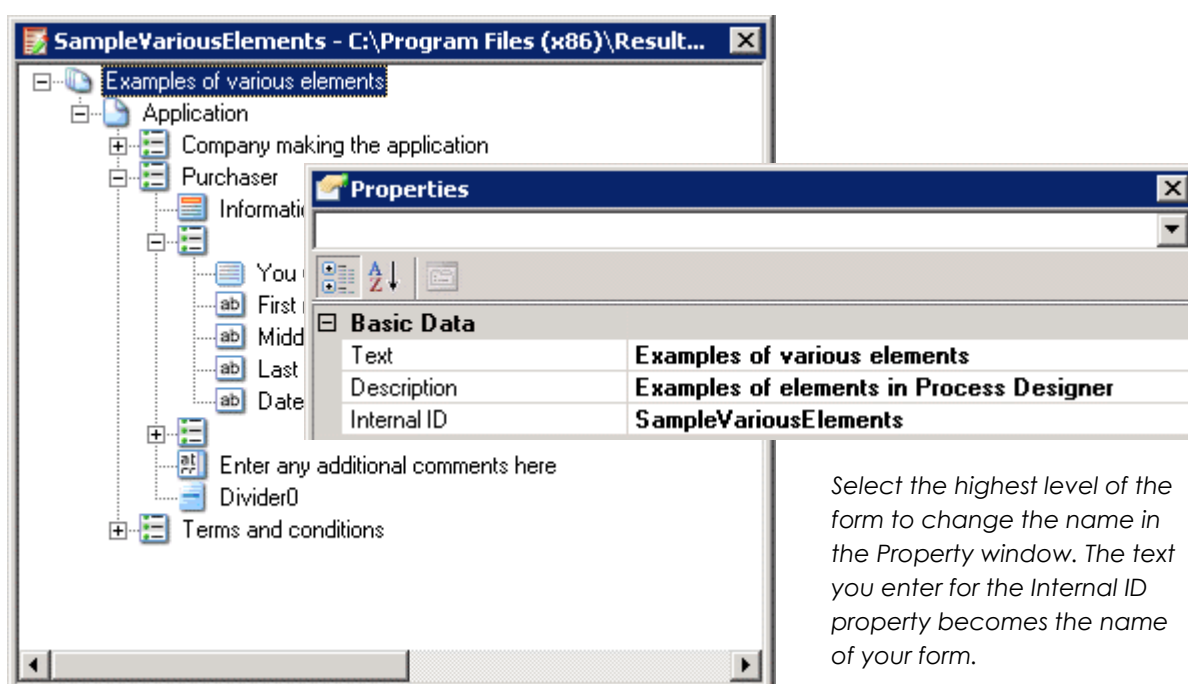**To open the Toolbox**, select *Toolbox* from the *View* menu or press *F10*.

- From the Toolbox, you can drag new elements into the Layout window and place them wherever you want.
- For an explanation of the various elements, see "Building Blocks of Form Designer." NOTE: A few elements are not available at the Form Designer level of Process Platform and are therefore not described in this manual.

B: Save the form with a new name

Each time you start designing a new form, start by giving it a name and saving it on your Process Platform server. This will help you avoid accidentally overwriting an existing form with new content.
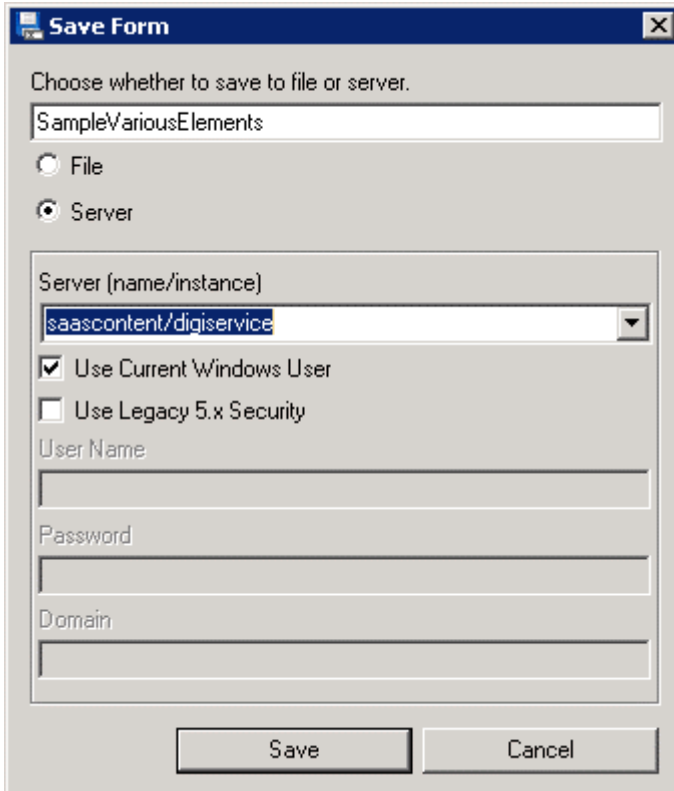
Where and how to assign a name to a form

- **When you look for a saved form on your Process Platform server,** its name will be the same as the text you entered for the *Internal ID* property in the form's *Properties* window.
- Spaces and certain special characters are not allowed in the text of an *-Internal ID*. If you enter a name that does not conform to the requirements for this property, a dialogue box will appear to help you.
- **When you view the same form in a browser**, the name displayed will be the same as the text you entered for the *Text* property in the form's *Properties* window.

Select the highest level of the form to change the name in the Property window. The text you enter for the Internal ID property becomes the name of your form.

Saving forms on the Process Platform server

When you save a form, you will be asked whether you want to save it on a *Server* (default choice) or as a *File*.

- **If you select File**, you will be saving only a static representation of the form, not a fully functional e-form that users can fill out. *File* can, however, be an appropriate choice for backup purposes or if you, for example, want to send the form to a collaborator who also has Process Platform.
- **If you select Server**, you save a functional e-form/workflow that can be displayed in an Internet browser and used for entering data.
- **User name and password:** Since Process Designer is directly integrated with the server box supplied with Form Designer, you do not need to enter a user name or password to save forms on the box.
- **When you use the Save As feature**, it is possible to change the name/Internal ID of the form. This happens on the Save Form dialog.

Select Save as in the file menu to save your form on the server to make it available for others. The settings for the server are typed in by default. Just hit Save.
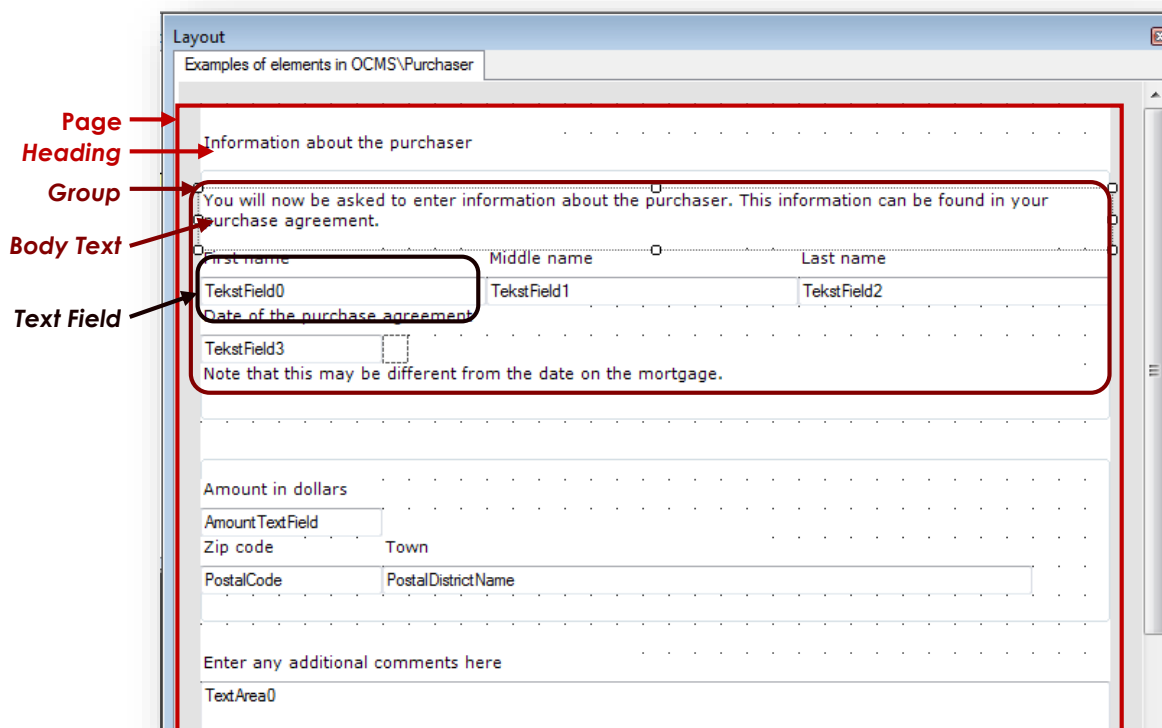
DO THIS:

- **To give your form a new name**, open the form's *Properties* window by right clicking on the top element of the hierarchy in the form window and selecting *Properties*. Then enter the desired name for the *Internal ID* property.
  NOTE that the new form name must be entered in the *Properties* window. You will not be able to enter it in the *Save As...* dialogue.
- **To save the form**, first check that the form window is active (if not, click on it). Then select *File > Save As...*, check that *Server* is activated and that the *Server Name* is *ocbox* (or the name of your Process Platform server) and click *OK*.

Page

Heading

Group

Body Text

Text Field
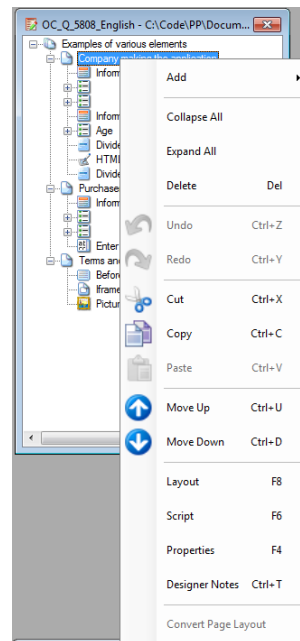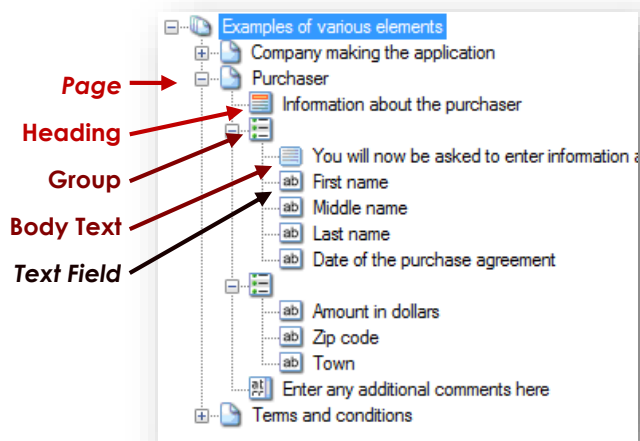
Unfold the hierarchy in the form window to view the elements of each page. Note that each element type has its own icon (see the Toolbox overview under "The Building Blocks of eForm Designer").

For this exercise, open the Application page.

Page

Heading

Group

Body Text

Text Field

The Layout window schematically shows the layout of the page. Compare this view of the Purchaser page to the view in the form window (above left).

C: Modify the form

Introduction

SampleVariousElements consists of one page named Application and three main groups:

- Company making the application
- Purchaser
- Terms and conditions

DO THIS: To open the Layout window for the Application page, right-click on the page's name in the form window and select Layout.

The following pages will show you how to carry out some basic operations for modifying a page layout.
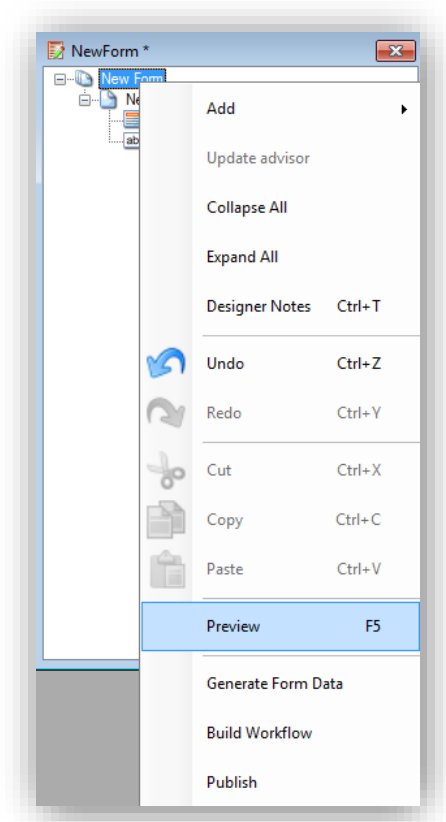
To view your form as it will look in the browser, right-click on the question-naire's name and select Preview or F5.

Purchaser

Information about the purchaser

You will now be asked to enter information about the purchaser. This information can be found in your purchase agreement.

First name

Middle name

Last name *

Date of the purchase agreement

Note that this may be different from the date on the mortgage.

Amount in dollars

Zip code   Town

Enter any additional comments here

In the browser, the Purchaser group of your form will look something like this.

Viewing your form in a browser

As you work with the form, you will probably want to check how your modifications will look. For this, you can use the *Preview* function, which shows how the form will appear to end users when displayed in a web browser.

DO THIS:

- • To preview your form:
- - Save the form as described above under "Save the form with a new name" (you will still be able to use *Undo* (*Ctrl+Z*) afterwards to undo any changes, if necessary).
- - Right-click on the form's name at the top of the hierarchy in the form window and select *Preview*, or click anywhere in the form window and press *F5*.

Deleting, moving and resizing elements

- • **To delete an element** in the *Layout* window, click on it and press the *Delete* key.

- • **To move an element** in the *Layout* window, click on the element and:
- - *Either*: Drag the element with the mouse.
- - *Or*: Press the relevant arrow keys on your keyboard to move the element in the desired direction.
- - If the element has a label, make sure you click on the element itself. Otherwise, you will move only the label.
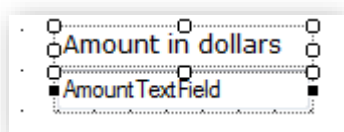
- • **To change the size of an element** in the *Layout* window, click on the element and:
- - *Either*: Drag the square white -handles that -appear in the frame around it.

- *Or*: Hold down the shift key and press the relevant arrow keys on your keyboard.
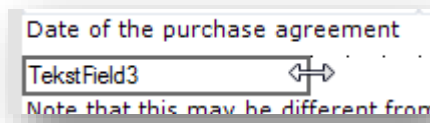
DO THIS in the Layout window:

- To practice deleting elements, click on the Middle name field and press the Delete key.
- To practice moving elements, click on the Amount in dollars field and move it farther to the right by dragging it and by using the arrow keys.
- To practice resizing elements, click on an element and resize it by dragging its -handles and by holding down shift and using the arrow keys.
-

Adding and placing new elements

There are two ways to add elements in Form Designer.

DO THIS: To practice adding elements:

- Drag a *Heading* element from the *Toolbox* into the *Layout* window (if the *Toolbox* is not open, open it by pressing *F10*).
- Now add a text field by right-clicking on the *Purchaser* group in the form window and selecting *Add > Text Field*.

- To add an element to a page:
- *Either:* Drag it from the toolbox to the desired position in the *Layout* window. The new element will also appear in the form hierarchy, at the end of the group you dragged it to. You may therefore have to manually change its position afterwards (see below).
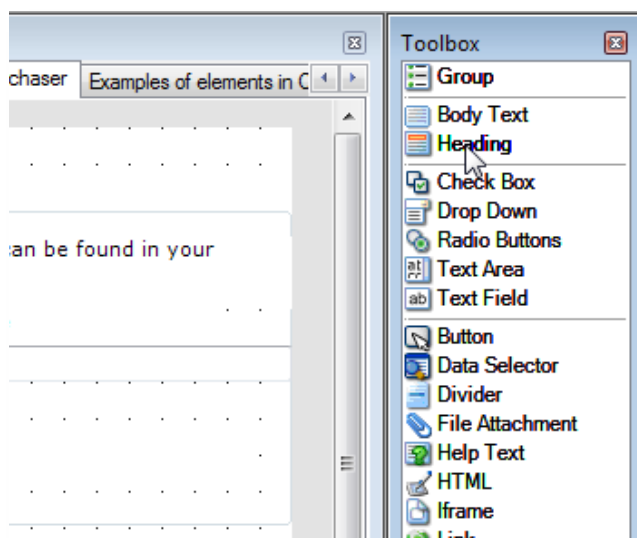
- *Or:* Right-click on a page or group in the form window and select- *Add* and the desired element type. The new element will appear at the end of the active page or group in the hierarchy and at the left-hand edge of the *Layout* window. The left-hand position was chosen as the default because it will always produce an acceptable layout. If desired, you can manually move the element to a different position on the page, but the default position is recommended for most purposes.
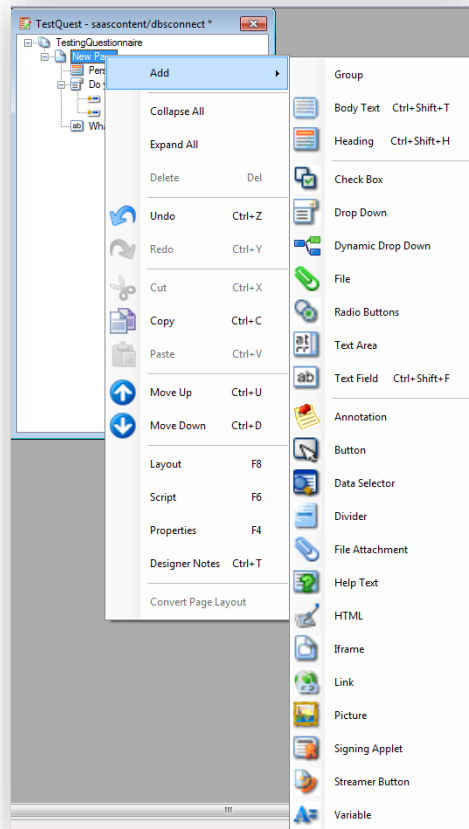
- • To change the position of an element in the form hierarchy within its page or group, click on it and use the following shortcuts:
- Up: Ctrl+U.
- Down: Ctrl+D.
- Repeated use of these functions will "circulate" the element within the page or group (i.e., if you reach the top, the next position will be the bottom, and vice versa).

- • **To move an element in the form hierarchy to a different group,** drag it until the cursor is over the icon or name of the desired group. It will be added to the end of that group.

At first, you may find it easiest to add elements by dragging them in from the Toolbox. However, once you are more familiar with Form Designer, you will probably find it more efficient to add most elements via the form window, where you have immediate control of their position in the hierarchy. Note that the place the elements have in the form tree structure is not the same as they will have in the layout manager. This gives the possibilities of different structures for receipts and layouts.

Setting the properties for an element

In the *Properties* window, you can change some settings related to the way an -element is presented to users. For example:

- You can change the name shown for the element.
- You can define what type of information the user must enter (-numeric, date, text, e-mail or password).
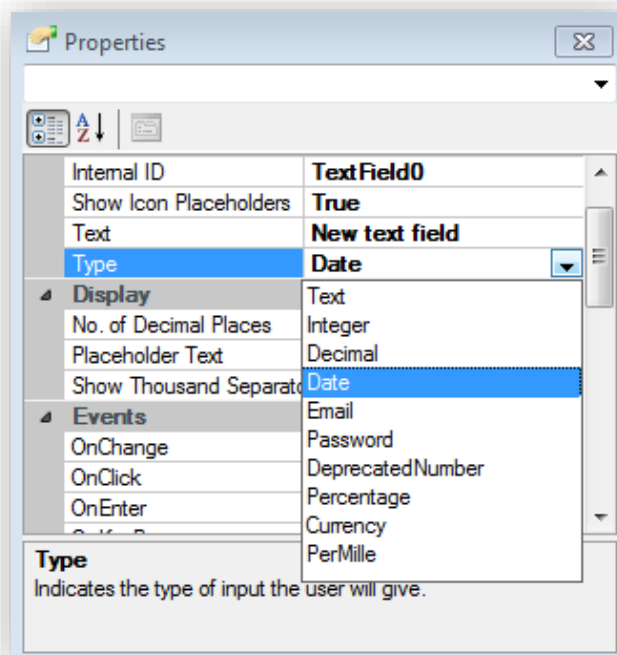
For a Text Field, the Type property lets you specify the type of information that must be entered by the user.

- **To view and/or change an element's properties,** open the Properties window by right-clicking on the element and selecting Properties. Then enter the desired content for the property.
- **NOTE:** The *Internal ID* property is generated automatically by the program and should not normally be changed. Advanced user can howevere have some advantages of changing it, if they need to call it in JS.

DO THIS: To practice changing properties:

- Open the *Properties* window for your new *Text Field* or *Heading* element and type the desired name for the element into the *Text* property.
- For the *Text Field*, click on the *Type* property and select *Date* from the pulldown menu.

Including or excluding an element from the receipt

Form Designer automatically assigns a *Variable Name* to each element in a form. The program uses these names when it generates "form data," which is involved in displaying receipts to the user.

The *Variable Name* is particularly important for any -element (*Text Area*, *Text Field*, *Drop Down*, *Radio Button* and *Check Box*) that can contain data entered by end users, since you will normally

want these data to be shown in the receipt. If desired, you can change the automatically generated *Variable Name* to a name of your own choosing.

- **To change an element's Variable Name,** type the desired name into the Variable Name property in the element's Properties window.
    - If your workflow must conform to a given XML standard, use the naming conventions realated to that standard.
    - A good **practice** in any case is to avoid using spaces and special characters and to start each new word with a capital letter if the name consists of more than one word (for example: -CurrentMailingAddress).
- To prevent an element from being shown in the receipt, leave its *Variable Name* property

blank

| TAB Order | 0 |
| Variable Name | Date |

Creating user-friendly layouts

Form Designer intentionally limits the layout possibilities available to designers, in order to ensure that the final product is consistent and user-friendly.

For example, when you add a new element via the form window, it is always placed at the left edge of the layout. Labels are placed directly above their text fields, and radio buttons and check boxes are automatically aligned with each other on the page.

You will also discover that, when you add elements by right-clicking in the form window, their vertical placement in the Layout window is automatically optimized to create a harmonious page in the browser.

You can freely change the layout of your forms, but If you stick close to the default settings in Form Designer, your forms will be easy and efficient for users to navigate in.

For additional tips on optimizing the usability of your electronic forms, see "Maximizing User-friendliness."

D: Create the workflow for the form

When you are finished editing the content and layout of your form, you are ready to put it into a workflow. The workflow is the Container for your forms.

DO THIS: To create a Workflow to add your form to:

- *Either*: Select New >Workflow from the File menu.
- *Or*: press Ctrl + N
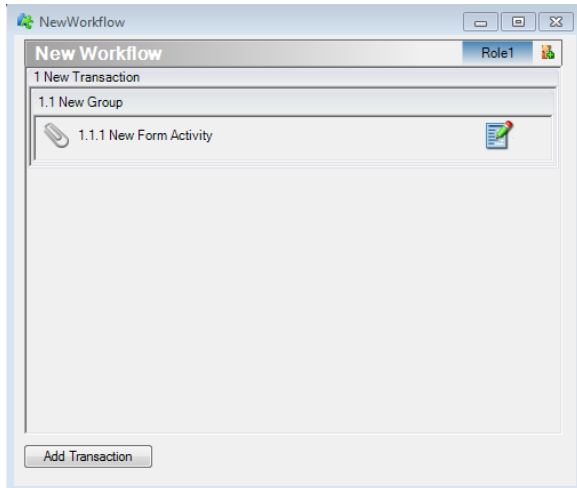
The workflow will look like this when it is created
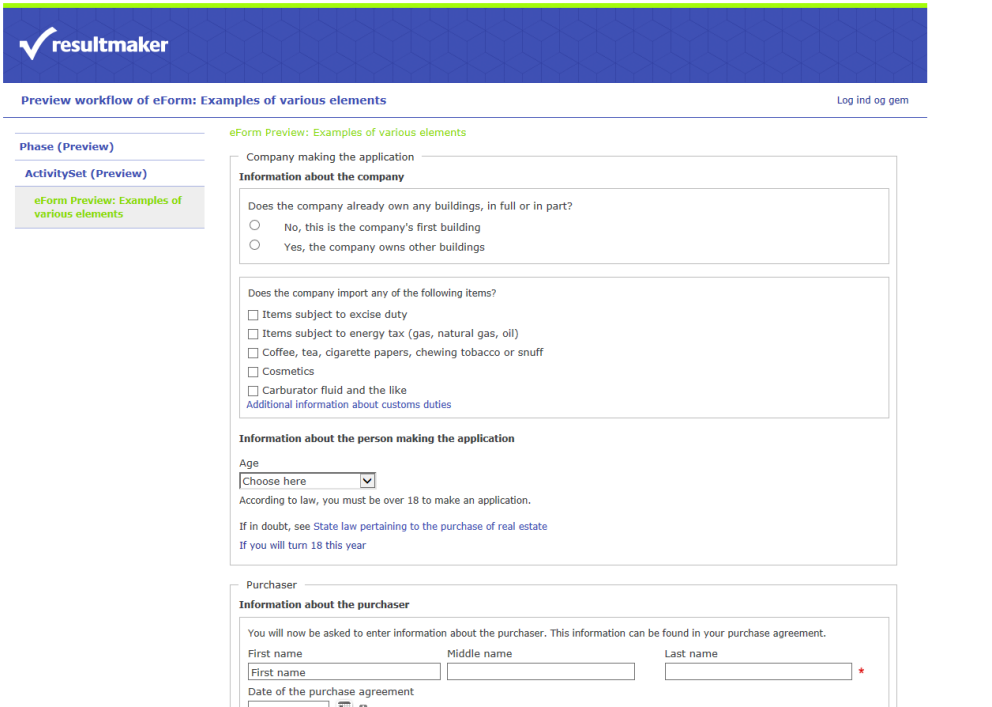
Start off by naming your workflow and select the server you want to save it to. This gives you the option of using the preview function directly from the workflow. This is done the same way as forms, in the property window. For more details see the "Getting started with Process Design" section of the "User Manual for Process Design in Resultmaker Process Platform" manual – located on the "Resultmaker Partner Site".

Now it is possible to attach the form you have created to the workflow. This is done by adding the form to the first form activity step.

DO THIS: To attach a Form to the Workflow:

- *Either*: click the Paperclip and search and select the desired form from the server
- *Or*: right-click the step and choose *Attach Form*

The whole workflow can now be previewed in the browser by pressing F5 or by selecting *Preview* in the View menu

In the browser, your completed tutorial e-form will look something like this.

E: Create Notes in the form

The Process Platform lets you keep track of your notes regarding your work in the Forms and the Workflow, this can be usefull when returning to a workflow, if more are working on the same workflow, etc. See figure below.

DO THIS: To add Designer Notes to your form:

- *Either*: right-click anywhere on the form and choose 'Designer Notes'
- *Or*: when form window is active press Ctrl+ T

This will open a separate window, the Designer Notes Window.
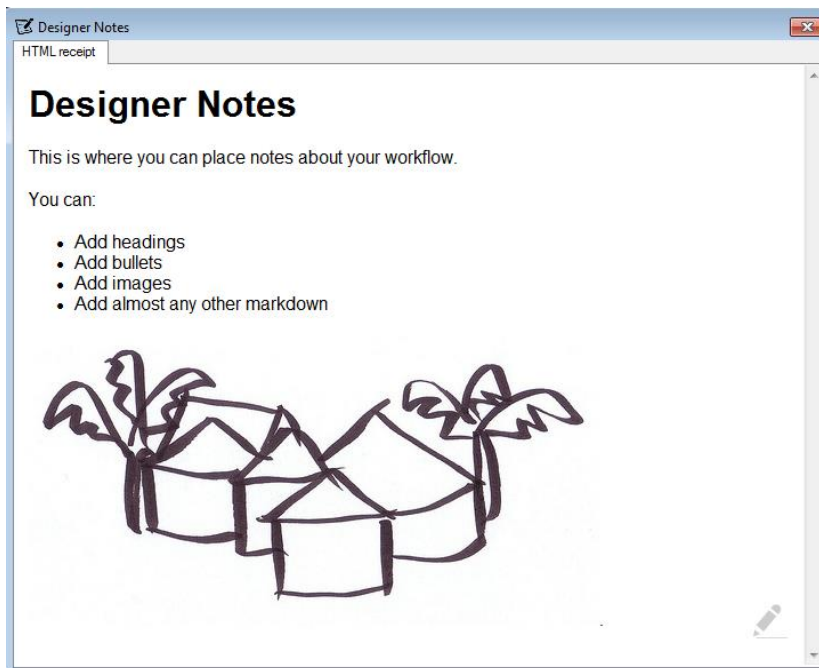
Designer Notes Window, that displays the nortes you have written.

This section will describes how to use the workflow.

1.1.1 Creating and using Designer Notes

It is possible to add different markdown elements to the notes: headings, bullets, images, etc.

To start writing notes you click the pencil in the bottom right corner.

This will give you a page for you to add your notes. In the bottom of that page there are tips for how to style and write the notes with markdown.
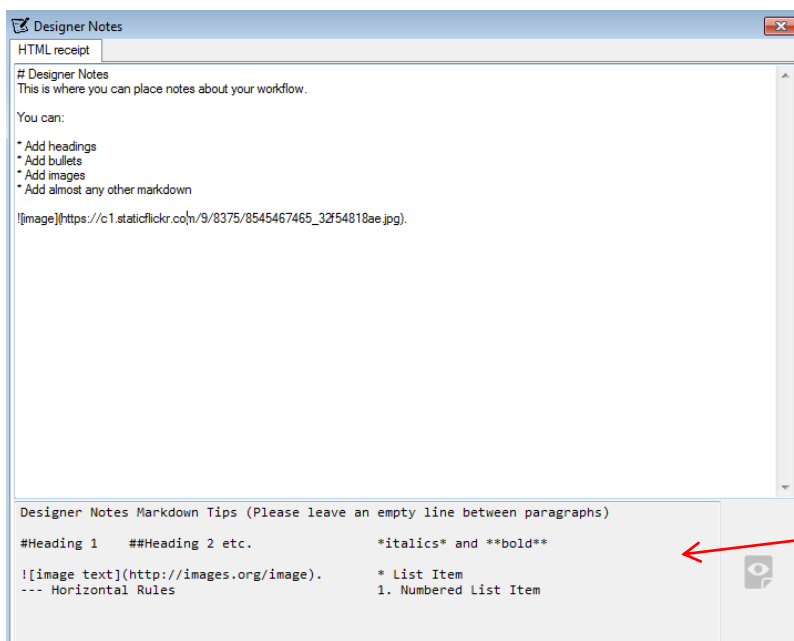
Designer Notes page that lets you write your notes

Tips for using Markdown in the Designer Notes Window

To see the notes you have created press the view document symbol in the bottom right of the window.

Now you can write whatever notes you might find relevant for the workflow, a small test is shown below to give another example of how to use it.
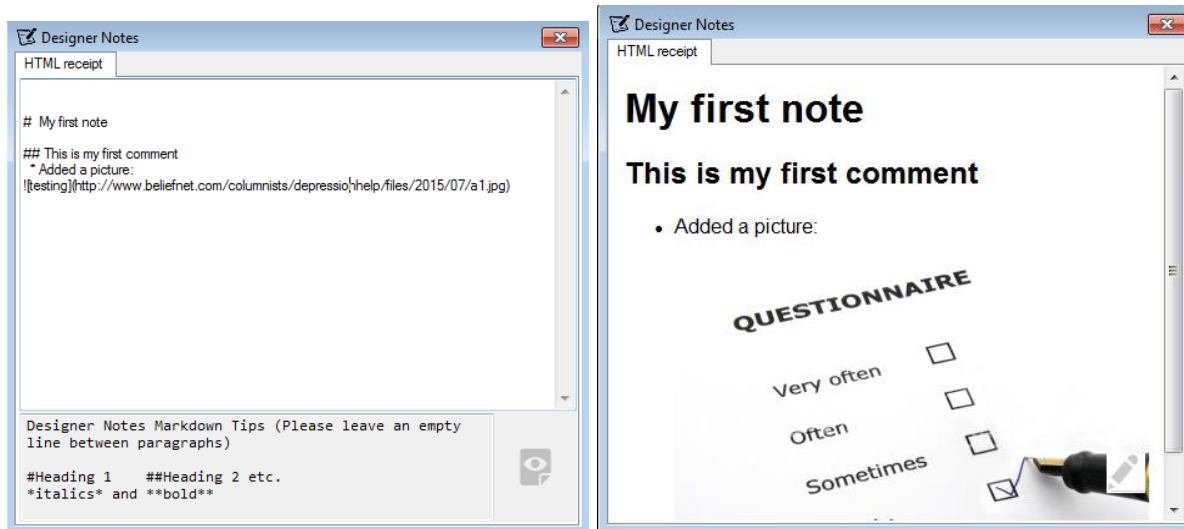
It is also possible to add designer notes for each workflow, this is shown in the "User Manual for Process Design".

The building blocks of Form Designer

Elements and properties

In Form Designer, you build up a form from elements. Each element has certain properties.

Elements

You can add elements to a form in two ways:

- by dragging them into the *Layout* window from the *Toolbox*.
- by selecting them from the right-click menu in the questionnaire window.

For the most part, the two methods are equivalent. As you become more familiar with Form Designer, you will learn what works best for you in various situations.
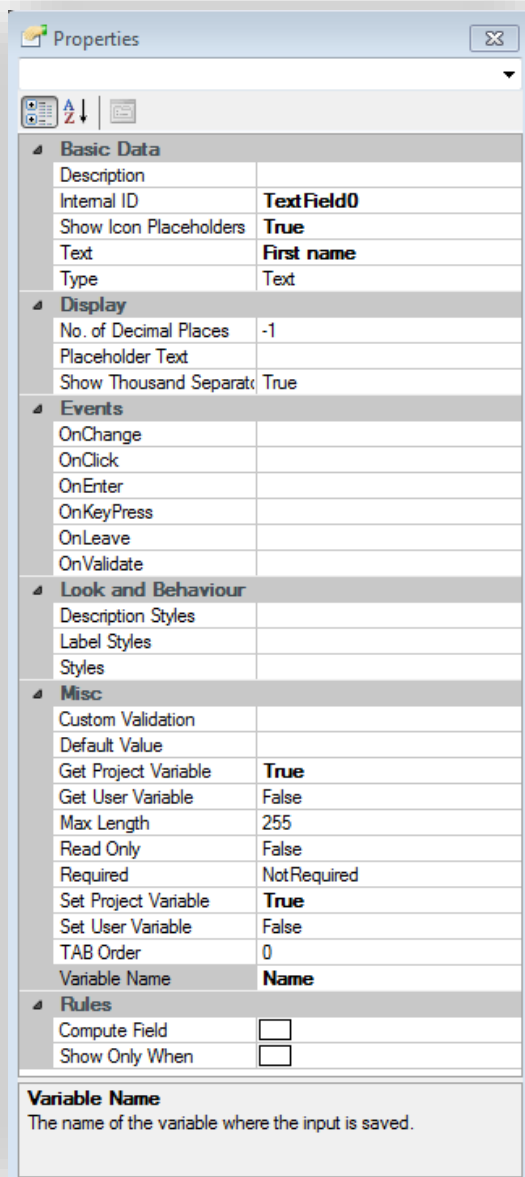
The individual elements are explained below under "Element types." Some advanced elements are not included at the eForms level of Process Platform. These are grayed out in the *Toolbox* illustration and are not described here.

Each type of element has its own icon that is used in the *Toolbox* and form window to help you recognize the various element types.

Properties

When you click on an element in the form or *Layout* window, you make it active, and the element's properties are displayed in the *Properties* window (assuming it is open). If you then click on another element, the *Properties* window will change to show that element's properties.

Depending on the element type selected, the *Properties* window will display different items. Some properties apply to all element types, while others are only relevant for one or a few types of elements.

The Properties window for a Text Field. Some elements have fewer or other properties than the ones shown here

For some properties, the defaut values do not need to be changed, while for others, you will need to enter the values or content you want.

If a property has predefined values, clicking on it in the *Properties* window will display the icon for a pull down menu for selecting the desired value.

In some cases, clicking on a property will display the icon "...". Clicking on this opens a window in which you can select one or more values (for example, the *Styles* list) or enter free text (for example, the *HTML* editor).

This section gives a brief explanation of the properties you will need to address, concentrating mainly on properties that are relevant for a number of different elements.

Description

The *Description* property creates a help text that can be displayed either as a mouse-over (the default mode) or as an integral part of the page. In default mode, if you enter text for the *Description* property, an information icon is displayed next to the element. When the user places the cursor over the icon, the text you entered is displayed.

If you want the text to be displayed directly on the page, set *Show Icons* to *False*, drag a *Description Extender* into the *Layout* window from the *Toolbox* and use its *-Attach to element* property to attach it to the relevant element.

If you need to write a long text, it can be an advantage to write it in Notepad or another simple text editor and then copy and paste it into the *Description* property. Similarly, to work with a long text that is already in the *Properties* window, you can use *Ctrl+A* to select the whole text, then copy it to Notepad, edit it and paste it in again.

Internal ID

An element's *Internal ID* is generated automatically. However it is good practice to change the name of the Internal ID, so that it represents the field.

The value of the Internal ID must begin with a letter [a-z] or [A-Z] and may be followed by any number of letters, digits [0-9], hyphens "-", underscores "_" colons ":", and periods "." as long as [:-] is never used.

Show Icon Placeholder

Show Icon Placeholder should normally be set to *True*. This will reserve space in the layout to display:

- Required: the symbol (∗) indicates that a field must be filled out.
- Description: the information icon that indicates that a mouse-over help text is available.

A star next to an element shows users that an answer is Required.

If *Show Icons* is set to *False* the space is used for the field to be broader, so that the screen space can be better utilized. However as seen below, the required field overrules the Show Icon Placeholder settings.
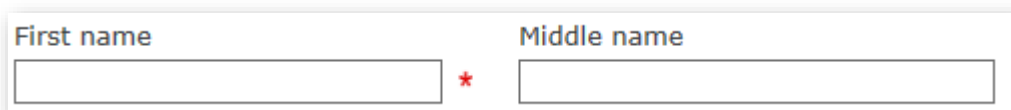

Figure 1 No description, Required=Required/ConditionrRequired and Show Icons Placeholder=false

Figure 2 No Description, Required=NotRequired and Show Icons Placeholder=false

Note that there are three options under 'Required': NotRequired, ConditionalRequired and Required.

NotRequired and Required is selfexplanatory, but ConditionalRequired needs a short explanation. Conditionally goes together with the feature where it is possible to hide and show form elements. An element that can be hidden should not have the Required setting, but instead the ConditionallyRequired. In effect in means that if such an element is presented the Required validation will be enforced, and if it is hidden it is not enforced.

Text

The text you enter here is displayed to the user. This property is used for entering the actual content of many elements, such as a *Body Text*, *Heading*, *Text Field*, *Text Area*, the name of a *Group*, and the individual answers for *Check Boxes*, *Drop Down Options* and *Radio Button Options*.
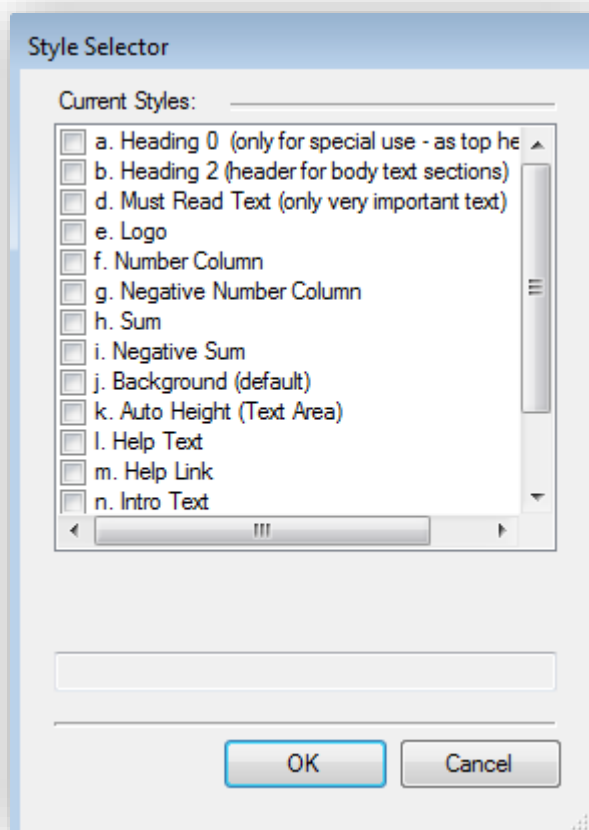
The Style Selector lets you change the way some text elements appear typographically in the browser. Normally, however, the predetermined default styles will give you the best results.

If you need to write a long text, it can be an advantage to write it in Notepad or another simple text editor and then copy and paste it into the *Text* property. Similarly, to work with a long text that

is already in the *Properties* window, you can use *Ctrl+A* to select the whole text, then copy it to Notepad, edit it and paste it in again.
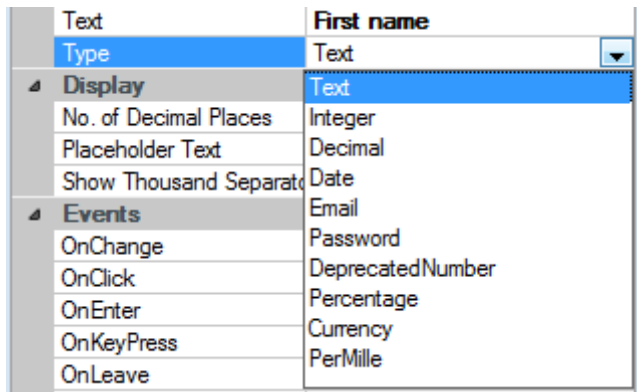
Type

For a *Text Field*, the *Type* property defines how the user's input will be displayed. If nothing is specifically chosen, the data type *Text* is used by default.

The Type property lets you specify what kind of data must be entered in a Text Field and automatically formats the entered data correctly.

The following data types are possible:

- *Text* is the default mode and displays regular text. There are no validations on this element type.
- *Integer* display and validates whole numbers.
- *Decimal* displays the entry in the correct local decimal format and validates for legal input.
- *Date* displays the entry in the correct local date format and validates for legal date input.
- *Email* displays the entry as an e-mail address and validates for legal date input.
- *Password* changes the characters entered to "*****".
- *DeprecatedNumber*, this type should only be used for backwards compatibility, but should preferable be change to *Integer* or *Currency*.
- *Percentage* displays the entry in the correct local format and validates for legal input.
- *Currency* displays the entry in the correct local format and validates for legal input.
- *Permille* displays the entry in the correct local format and validates for legal input.
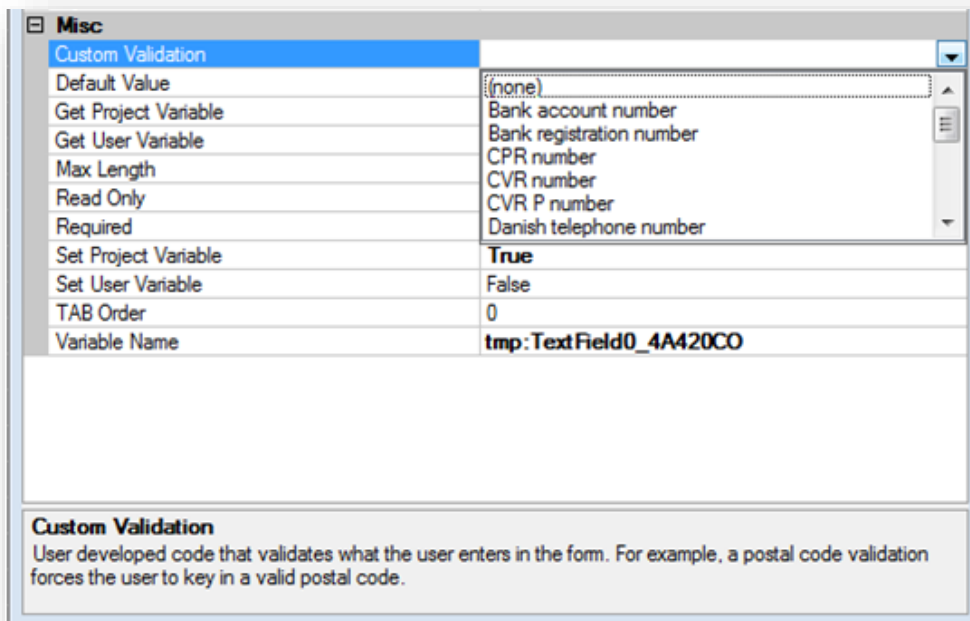
Styles

Each element in Form Designer is preformatted in a default style that has been specifically selected as the most functional typography for that type of item. You will therefore generally not need to change the *Styles* property, but if you do, you can access a list of predefined styles.

For some elements, such as a *Heading* or *Body Text*, the style affects the way the element itself is displayed. For a *Text Field* or *Text Area*, the style affects the appearance of the information the user types in. For these elements, you can therefore also change the style of the element's label (its "heading," taken from the *Text* property) and *Description*, but we recommend that you stick to the default styles, as they will be the easiest to read.

To change an element's style, click on the *Styles* property, click on the "..." symbol and activate the desired style or styles in the *Style Selector* that appears.

Custom Validation

For a *Text Field*, you can use the *Validation* property to select one of a number of standard tests that can be performed on the data to ensure that they are in the correct format. If the data does not validate, the user will be shown an error message and will be asked to re-enter the data.

The Custom Validation property lets you select a standard validation test to ensure that the data entered in a Text Field are properly formatted. If not, the user is alerted.

Default Value

Default Value can be used to display a standard value or text for an element. For example, you could pre-fill a *Text Field* or *Text Area* with the most likely text.

If the element is a *Radio Button* or *Check Box*, you can use *Default Value* to preactivate a given answer. Click on the *Default Value* property and use the drop down menu to select the answer. For a *Radio Button*, the possible answers are represented by the *Internal ID*'s of the *Options*. For a *Check Box*, *true* means "checked."

Max Length

Max Length determines the maximum number of characters that can be entered in a field. The default value for a *Text Field* is 255 and for a *Text Area*, it is 32767.

If you set a maximum number of characters for an answer (especially if it is small), you should write a *Body Text* to alert users to the limitation.

Read Only

If *Read Only* is activated, the user cannot enter anything in the field or change any preset default values.

Required

You can use *Required* to determine whether a question must be replied to. The require-ment will be indicated in the browser by a star next to the element. If the user clicks *Continue* without having replied to the element, a message will be displayed that reminds him or her to reply.

TAB Order

The TAB Order value determines where the current element is placed in the TAB Order on the page. The values can be specified from 0 to n. If you start changing the TAB order it is good practice to change it for all elements on the page.

Figur 2 Tab Order property

Variable Name

Any element that contains data should have a *Variable Name*, because this property is used to return the data to the user in the receipt. Form Designer assigns a *Variable Name* automatically, but you can change the name if you want to.

Note that it if two elements in a form need to have the same data entered (for example, if the name or identification number of a person or company needs to be entered in more than one place), you can get Process Platform to fill out the second occurence of the data automatically by giving the second element the same *Variable Name* as the first one.

Read more about variable names under "Tutorial and basic information", "C: Modify the form", "Including or excluding an element from the receipt".

Using HTML in Body texts

Form Designer lets you use a few basic HTML tags to highlight text as bold or italic, insert a line break or insert a link. If you need other HTML tags, for example to create a bulleted or numbered list, use an *HTML* element.

The following tags can be used directly in the texts you write for a bodytext or any element's *Text* and *Description* properties:

        <b>   bold

        <i>   italic

    break (forced line break)

        <a>   anchor (link)
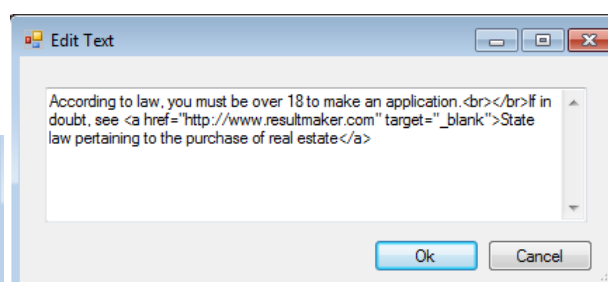
HTML codes in a Body Text element. It is shown by clicking the '…' button in the textfield in the properties of the body text element.

The same Body Text displayed in the browser.

Copy Script ID

This is the ID of the entire script ID for the given element. This is used for…

To copy script Id right click on the element which Id you want to copy and select 'Copy Script Id' see figure below.
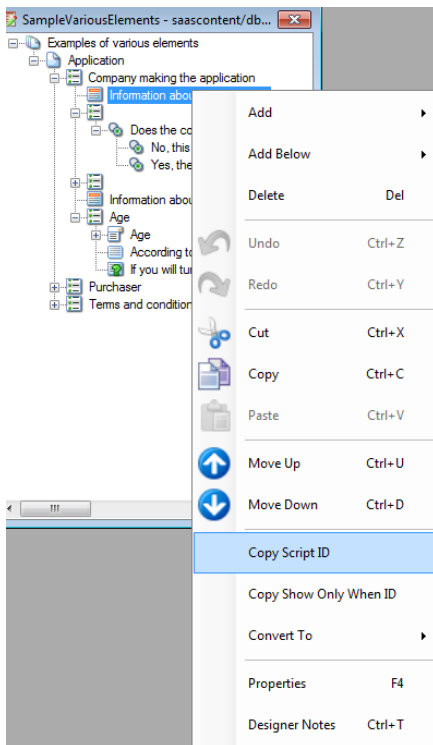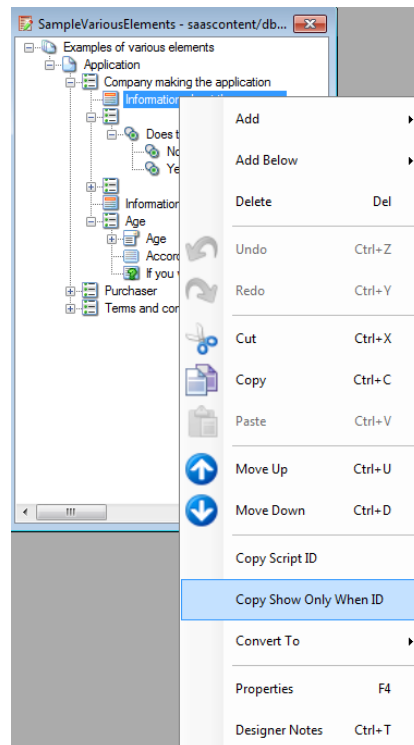

'Copy Script Id' by right clicking

'Copy Show Only When ID' by right clicking

Copy Show Only When ID

This is the Id name needed for using the 'Show only When' function explained below. It removes the unnecessary path of the ID. This is found in the same way as the 'Copy Script ID'. See figure above

Show Only When

The Show Only When feature gives you the possibility of show and hide elements in the forms depending on a previous answer from other question elements etc. without having to create a JavaScript. An example of this could be if an answer generates its own question, or group of questions that are shown or hidden depending on the users previous answer. It is found in the Properties window for the specific element.
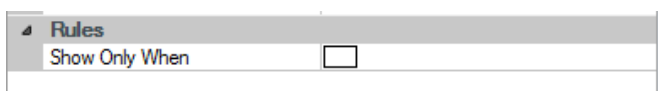
Show only when, is in the buttom of almost all elements.

Example of 'Show Only When' were the next question is shown only if the user answers yes in the previous RadioButton Question

1. Create a new form by left-clicck on the file and selecting *New > Form* or Ctrl + Shift+ N
2. Create the RadioButton by right clicking on the element or the page and choose *Add > Radiobutton* or *Add below > RadioButton*

3. Create a *TextField* below by right clicking on the *RadioButton* element and select *Add below > TextField*

4. Choose which option in the *RadioButton* should show the *TextField* and which option should hide the *TextField,* find the ID of the option that should show the *TextField.* Here we choose Option1 (see fig. below)

5. Right-click on the *RadioButton* and select 'Copy Show Only When ID'

6. Open *TextField* and paste the 'Show Only when ID' into the 'Show Only When' property in the buttom of the *TextField* properties window. Finish by indicating what Option it is depending on, by adding == and the Id of that Option, see fig below.
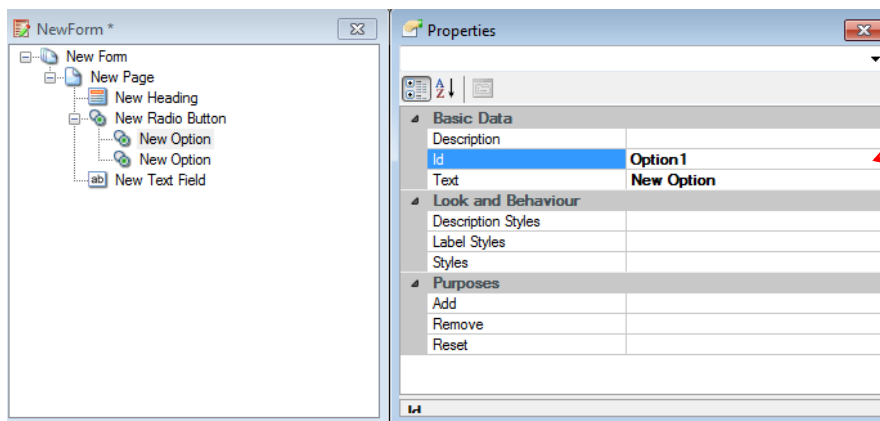
Find the ID of the option that you which to show the
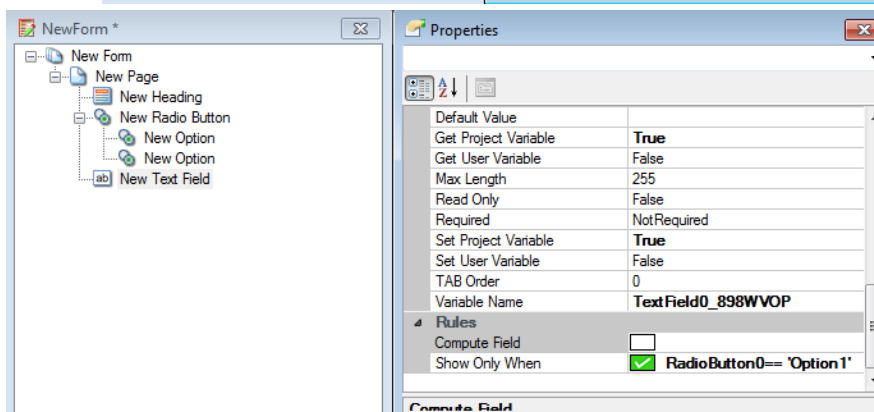
In 'Show Only When' property of the TextField add the Show Only When ID' equal to

Element types

This section systematically explains the element types that are available in Form Designer. They are presented in the same order you will find them in the *Toolbox.*

The examples shown are taken from the supplied sample forms.

Group

When you are laying out a page, it is often a good idea to take elements that logically belong together and gather them into a group.

Grouped elements help users get an overview of the layout, especially if you use visual effects like a border (with or without the group's name) and/or a gray background. Grouped elements also make your layout work easier, because some operations (moving, styling, etc.) can be carried out on the group as a whole instead of each individual element.

To create a group

7. Drag a *Group* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Group*.

8. Insert the desired elements by dragging them from the *Toolbox* or by right-clicking on the group name in the form window and selecting *Add > [element type]*.

   » In the form window, you can also use the mouse to drag existing elements into or out of a group. Drag the element until the cursor is positioned over the icon for the group or the page you want the element to become part of and release the mouse button.

   » In the *Layout* window, make sure you drag elements into the space defined by the group's border if you want them to become part of the group.
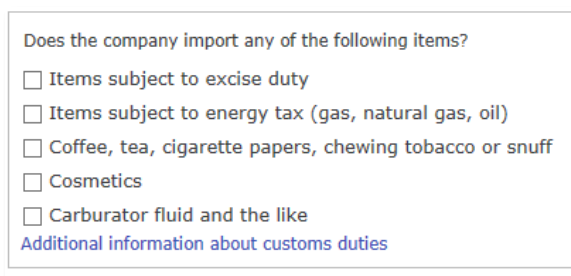
9. If you want the browser to display the group's name, type the desired text into the *Text* property in the group's *Properties* window and set the *Show Border* property to *True*. Both of these conditions must be fulfilled for a name to be displayed.
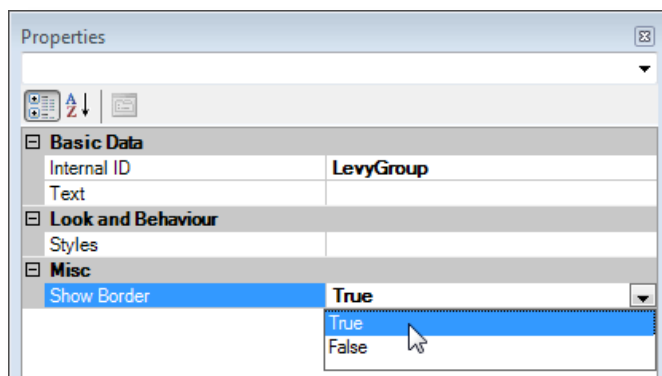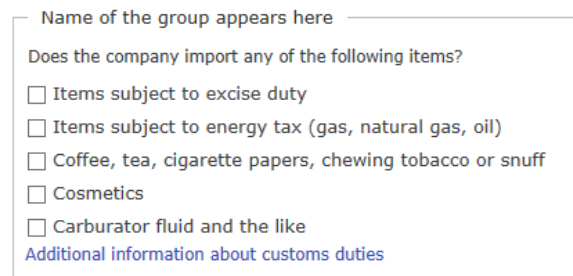
To create a border around a Group, set its Show Border property to True.

To change the way a group appears in the browser

1. Border: To create a border around the group, set its Show Border property to True. If the group has a name (in other words, if its Text property is not blank), the name will automatically be set into the top line of the border.

If the group has a name, it is automatically included at the top of the border. If you don't want to display a name, leave the group's Text property blank.

2. Gray background: To create a light gray background for the group, click on its Styles property, click on "..." , activate Background (default) and click on OK.

You will now be asked to enter information about the purchaser. This information can be found in your purchase agreement.

First name	Middle name	Last name
		*

Date of the purchase agreement

Note that this may be different from the date on the mortgage.

A Group with a background(default) as it would appear in the browser.

3. No graphics: By default, groups are displayed in the browser without a border (because the Show Border property is set to False), without a gray background (because the Background (default) style is not activated), and without the name of the group.

4. NOTE: To help you get an overview of your layout, the Layout window shows each group with a border and (if there is one) the name of the group, whether or not you ask for a visible border in the browser.

Body Text

A *Body Text* can be placed anywhere on the page and is not directly connected to any other element. This element is most commonly used for writing explanatory texts.

You can determine how a *Body Text* will be displayed by using the *Styles* property. For example, you can use the *Emphasize* style to create a heading-like text or the *Must Read Text* style for an important warning that must not be overlooked. To help you create forms with a unified and consistent appearance, Form Designer offers only a limited number of different styles.

Properties

Description	
Internal ID	Body Text 0
Text	You will now be asked to enter informat
Type	Text
Display	
No. of Decimal Places	-1
Show Thousand Separator	True
Events	
OnClick	

Type the desired text for a Body Text element into its Text property.

Information about the purchaser

You will now be asked to enter information about the purchaser. This information can be found in your purchase agreement.

First name	Middle name	Last name
		*

Date of the purchase agreement

Note that this may be different from the date on the mortgage.

This is how the Body Text would appear in the browser.

Note that any styles you apply will only be visible in the browser, not in eForm -Designer's *Layout* window.

To create a Body Text
1. Drag a *Body Text* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Body Text*.
2. In the *Properties* window, type the desired text into the *Text* property.

To create multiple paragraphs in a Body Text
3. *Either: Use the HTML tag
 (forced line break) to start a new paragraph. This is only possible when choosing a HTML element, not with a body text element.*
4. *Or: Use a separate Body Text element for each desired paragraph.*
5. *Note that a Body Text has a maximum length of 500 characters, so if you exceed this limit, it is necessary to use the second approach with separate Body Test elements, each with less that 500 characters*
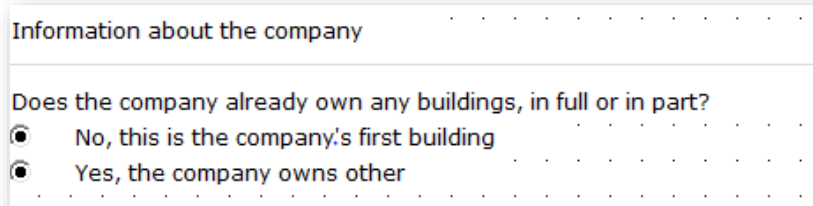
To change the style of a Body Text
1. Click on the *Styles* property, click on "..." , activate the desired style and click on *OK*.
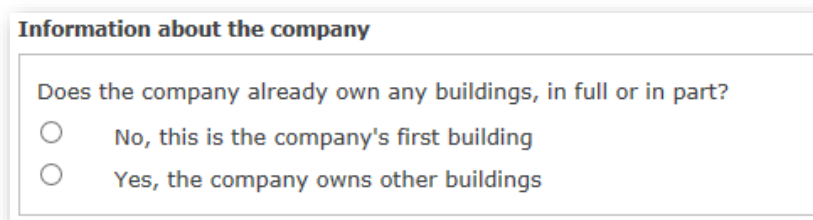
Heading

Headings help structure the page and give users an overview. They appear in bold type and a larger font size in the browser, but in ordinary type in Form Designer's *Layout* window.

In Form Designer, headings that are created as a *Heading* element are also included in the automatically generated receipt. This means that there are cases where you may prefer to use another method of creating what looks like a heading on the page.

Information about the company

Does the company already own any buildings, in full or in part?
- No, this is the company's first building
- Yes, the company owns other

In the Layout window, a Heading is displayed without formatting.

Information about the company

Does the company already own any buildings, in full or in part?
- No, this is the company's first building
- Yes, the company owns other buildings

The same Heading as it would appear in the browser.

To create a Heading that will appear in the receipt

1. Drag a *Heading* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Heading*.
2. In the *Properties* window, type the desired text into the *Text* property.

To create a Heading that will not appear in the receipt
1. Drag a *Body Text* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Body Text*.
2. In the *Properties* window, type the desired text into the *Text* property.
3. Click on the *Styles* property, click on "...", activate either *Emphasize* or *-Heading 2* and click on *OK*.
-   *Heading 2* results in a slightly smaller font size than *Emphasize*, which in turn is slightly smaller than a *Heading* element would be.

Check Box
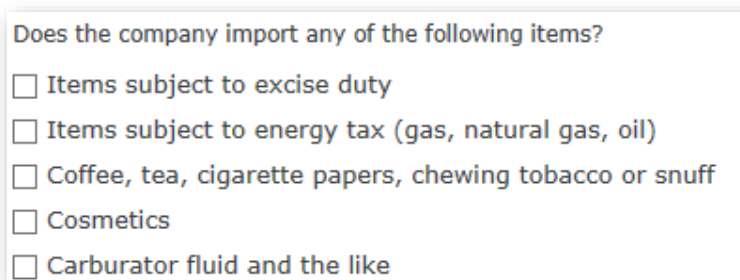
A *Check Box* is a statement displayed together with a small box that the user can click on to create a check mark.

Check boxes are typically placed after a question, such as, "Do you agree to the terms stated above?" or "Does the company import any of the following items?" For each possible answer, you create a check box with an accompanying text.

With check boxes, the answers are not mutually exclusive: the user can mark any or all of the relevant answers. If you need a set of mutually exclusive answers, use radio buttons or a drop down menu.
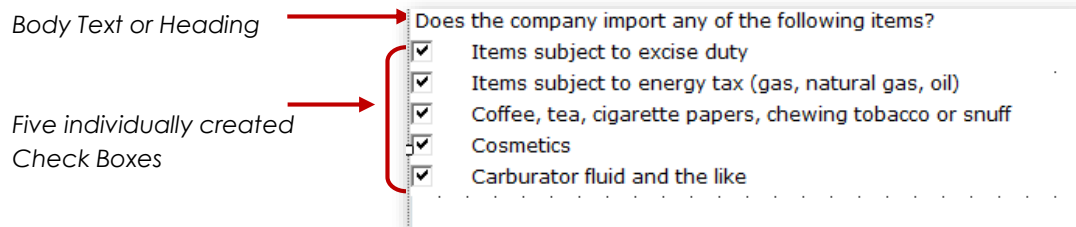
Check Boxes as they are displayed in the Layout window. Note that the element itself is the small square box, while the text next to it is its label (defined by the Check Box's Text property.

The same set of Check Boxes as they would appear in the browser.

In the receipt, a user's answer to a check box is taken from the ID property of the Checked or Unchecked option.You may therefore wish to change the ID texts from their default values of "Yes" and "No" to expressions that are meaningful in context.

To create a question with one or more non-mutually exclusive answers

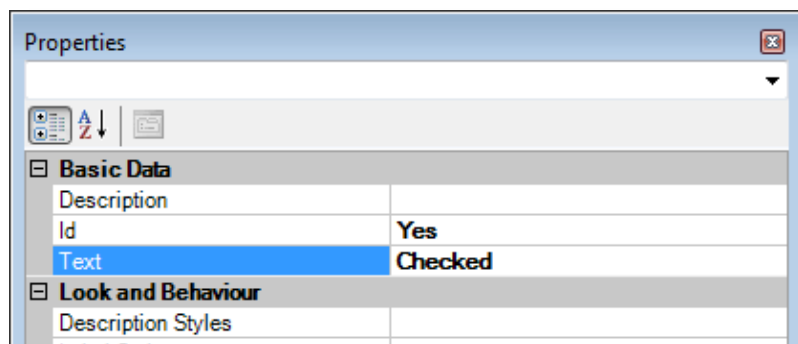1. Create the question by dragging a *Heading* or *Body Text* from the *Toolbox* into the *Layout* window or by right-clicking on the page name in the form window and selecting *Add > [element type]*.
2. Drag a *Check Box* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Check Box*.
3. For the *Text* property in the *Properties* window, type in the answer that you want the check box to represent. This is the text that will appear next to the check box.
4. Repeat steps 2 and 3 for each additional check box needed.

What do the "Checked" and "Unchecked" options mean?

Under each *Check Box* element, the form hierarchy automatically generates a *Checked* option and an *Unchecked* option. These represent the two possible states the check box can have when the user fills out and submits the e-form. They are necessary in order for the receipt to show whether the check box was activated or not.

If you click on the *Checked* or *Unchecked* option and look at its *Properties* window, you will see that the word "Checked" or "Unchecked," respectively, appears as the *Text* property. The *Text* property is only displayed in the form window, not in the *Layout* window or browser.

The contents of the *ID* property, on the other hand, will appear in the receipt as the user's answer to the check box. The default *ID* for the *Checked* option is *true* and for the *Unchecked* -option, it is *false*. You can change these expressions if desired. For example, you might want to change "true" and "false" to "yes" and "no" or to the equivalent in another language.

To change the way the answer to a check box is displayed in the receipt

1. In the *ID* property for the *Checked* or *Unchecked* option, enter the desired text.
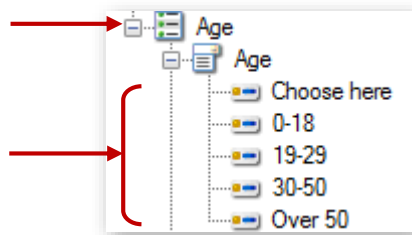
Drop Down

A *Drop Down* consists of a question, a heading or a statement, followed by a menu that lists the possible answers, preferably at least three.

It is common to make the first answer in the menu a "placeholder" text, such as "Choose here." Thus, the actual answers are not displayed until the user opens the menu.

Drop downs are easiest to create from the form window.

The Text property of the Drop Down element itself will become a heading for the Drop Down
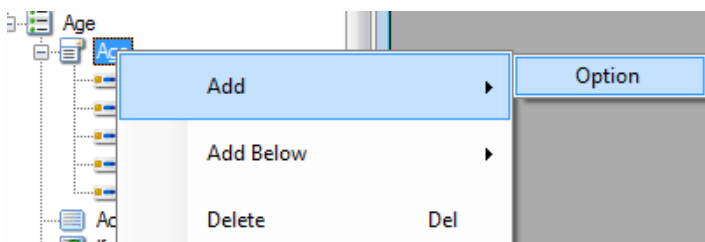
For each possible answer, create an -Option and type the text of the answer into its Text property. Make the first answer a general phrase that can act as a placeholder.

A Drop Down as it appears in the form window, after the answers have been typed into the Properties windows for the individual Options.
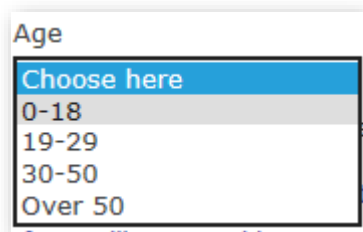
The same Drop Down as it would appear in the browser.

To add another answer to a Drop Down, right-click on the Drop Down element in the form window and select Add > Option.

To create a Drop Down menu

1. Right-click on the page name in the form window and select *Add > Drop Down*.
2. In the *Properties* window for the drop down, type the desired question, heading or statement for the menu into the *Text* property.
3. In the form window, click on the "+" symbol at the left of the drop down element to display its options, which are the posssible answers the user can choose. The first two options will have been created for you automatically.
4. For each additional answer needed, right-click on the drop down element and select *Add > Option*.
5. For each *Option*, go to its *Properties* window and type the text of the desired answer into the *Text* property.
- Make the first answer a generic placeholder such as "Choose here." This text will be the one that is visible to the user before he or she opens the menu.

Radio Button

Radio buttons provide mutually exclusive answers to a question. In other words, only one answer can be activated at a time. If you need a set of non-mutually exclusive answers, use check boxes.

Radio buttons appear in the user's browser as a series of buttons, each with an accom-pany-ing text. In the form window, the texts are structured as -*Options* under a single *Radio Button* element.

Radio buttons are easiest to create from the form window.

To add an answer, right-click on the Radio Button element in the form -window and select Add > Option. Each Option will appear to the user as a separate button with an answer.

The Text property of the Radio Button - element itself will become the question to be answered

A set of radio buttons as it appears in the Layout window.

For each possible answer, create an - Option and type the text of the answer into its Text property.
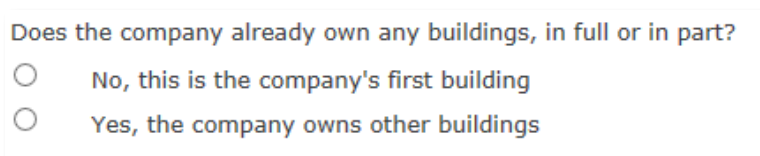
The same set of radio buttons as it would appear in the browser.
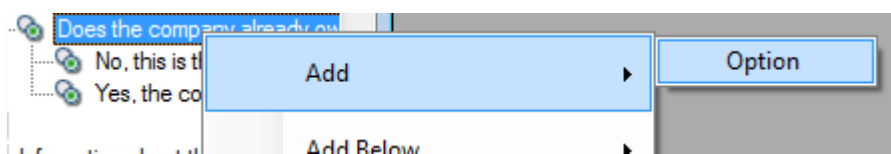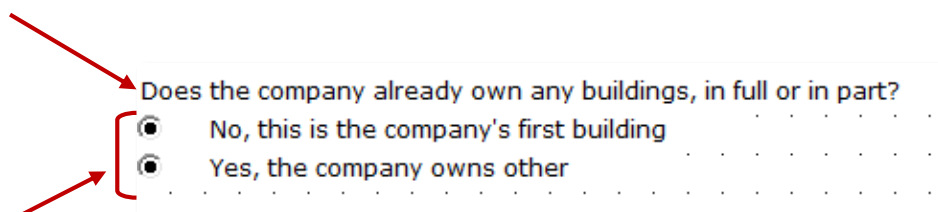
To create a set of Radio Buttons

1. Right-click on the page name in the form window and select
   Add > Radio Button.
2. In the *Properties* window for the radio button, type the text of the question to be answered into the *Text* property.
3. Click on the "+" symbol at the left of the radio button element to display its options, which are the posssible answers the user can choose. The first two options will have been created for you automatically.
4. For each additional answer needed, right-click on the drop down element and select *Add > Option*.
5. For each *Option*, go to its *Properties* window and type the text of the desired answer into the *Text* property.

Text Area and Text Field

Form Designer's two types of text entry fields are the elements you will use the most. These are the parts of the layout where users can freely type in information.

A *Text Field* lets the user enter a single line of information. Often this will only be a single word or number.

A *Text Area* lets the user enter a longer amount of text.

When you create a *Text Area* or *Text Field*, its *Text* property becomes a heading for the field (also referred to as the field's label). You can use this text to tell users what kind of information to enter.

Each text area or text field also has an *Internal ID* property. The *Internal ID* appears inside the element in the *Layout* window to help you identify the field, but is not shown in the user's browser. The automatically generated *Internal ID* should not normally be changed.

Both TextArea and TextFields have the possibility of computating inside the element. This possibility is found in the Properties window under 'Compute Field'
This possibility lets you compute different elements values added by the user and display it in another field. E.g. autocompute user input and display it in a field for the user to see.

The Text Field's Text property will become a heading for the field.

The Text Field's Internal ID property is shown in the Layout window to help you identify the field, but is not displayed in the browser.

Amount in dollars

Amount Text Field
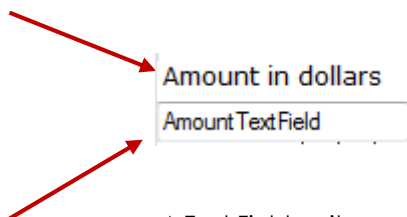
A Text Field as it appears in the Layout window.

Amount in dollars
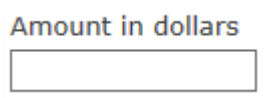
The same Text Field as it would appear in the browser.

Enter any additional comments here

TextArea0

A Text Area as it appears in the Layout window.

Enter any additional comments here

The same Text Area as it would appear in the browser.

To create a Text Field for entering a single line of text

1. Drag a *Text Field* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Text Field*.
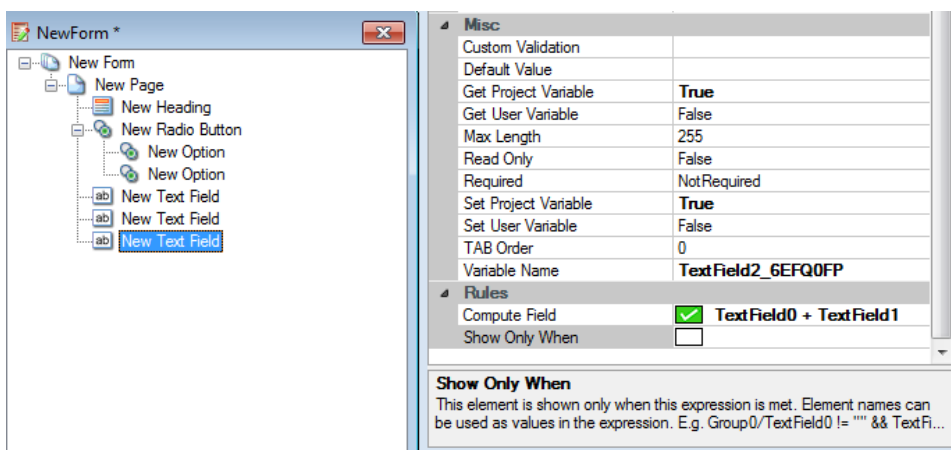2. In the *Properties* window, type the desired heading or name for the text field into the *Text* property.

To create a Text Area for entering multiple lines of text

1. Drag a *Text Area* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Text Area*.
2. In the *Properties* window, type the desired heading or name for the text area into the *Text* property.

To use 'Compute Field' for autocomputation

1. Use 'Copy Show Only When ID' from the fields you want to computate and add it to 'Compute Field' property of the field you want to sisplay the result.

2. Add the type of computation symbol you want to use(-,+,*, /) after the ID in 'Compute Field'
3. Add the next 'Show Only when ID' of the next TextField you want to use in the calculation. Continue as many times as you want.

Add the computation in the Compute Field of the TextField or TextArea that you want to display the result.

Addition Field

`1`

Second Addition Field

`7` ×

Result

`8`

This is how 'Compute Field' looks in the browser. The Last field is the one using the 'Compute Field' option and thereby displaying the sum of the two previous fields.

File Element

The File Element is used to give the user he possibilities to attach files or present the possibility for file download.

The Properties of the File Element gives the possibilities to decide size, height, file types etc.

Determine allowed file types

Decide Max size

Properties for the File Attachment element

To create a File

1. Drag a *File* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > File*.
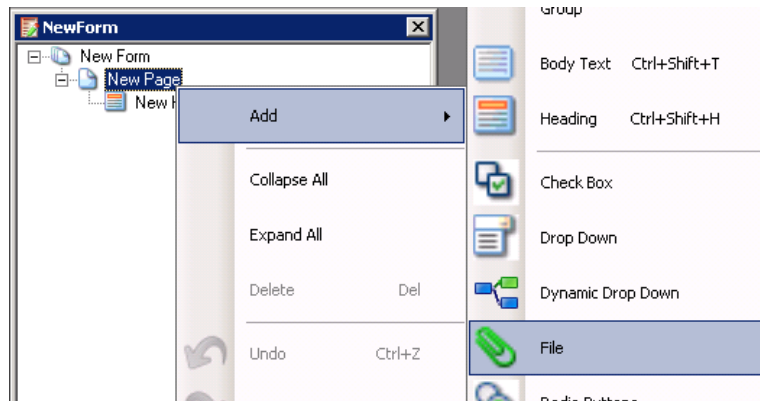
2. The *File* element has a standard Text it displays. Other options could be to add Description or an explanatory *BodyText*
3. The max size of the file can be restricted by changing the size in the property 'Maximum File Size'
4. The types of files that will be accepted can be decided in the property 'Accepted File Types', this is done by adding the file extension names of the accepted files, e.g. .pdf, .docx etc.

This is how the File-element looks in the browser before upload

When the user clicks the File element this window pops-up and the user can now add the files the want.
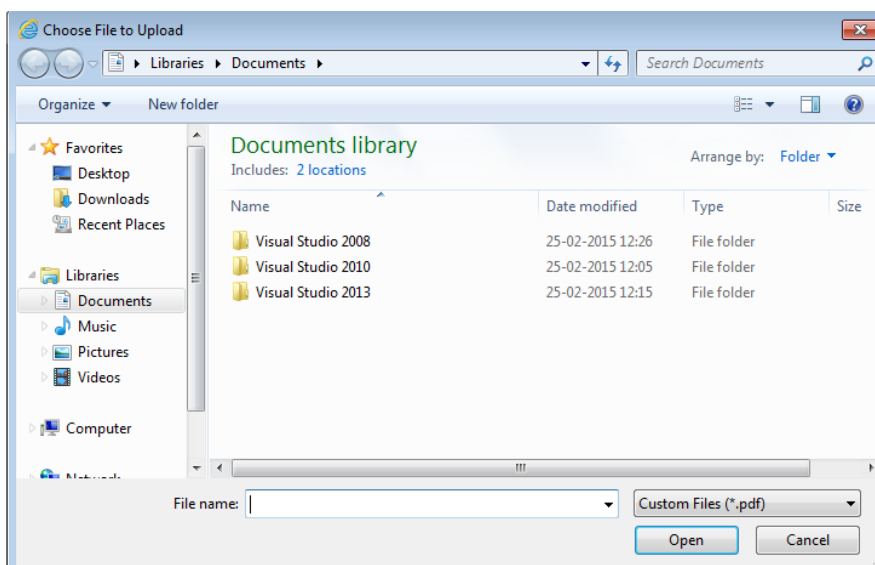
Window that pops-up when user clicks the File element.

After uploading the file it is possible to remove it again or to access it via clicking on the file name.

File upload

Remove

ⓔ Calculation.xlsx
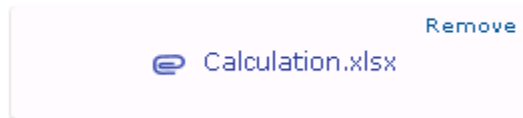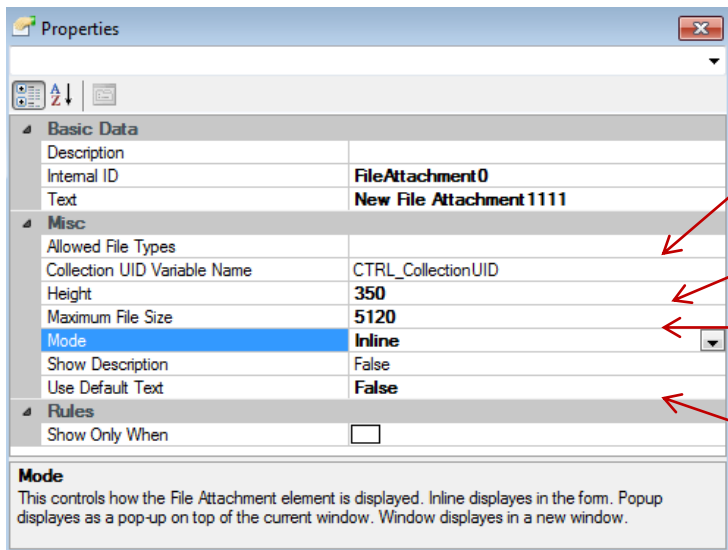
This is how the File-element looks like after uploading a file

File Attachment

File Attachment is used to attach files in older versions, it has some of the same principles as the File element, but more fields that needs to be filled.

Determine allowed file types

Decide height

Decide Max file size

Decide whether or not to display the default text or your own text

Properties for the File Attachment element

To create a File Attachment

5. Drag a *File Attachment* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > File Attachment*

6. The *File Attachment* element has a standard Text it dispays, It is possible to costumize it by setting the property 'user Deafult Text' to false

7. The *File Attachment can be displayed in three different ways:*
    a. *Inline*
    b. *Popup*
    c. *Window*

    The option used is inline, therefore the other options will not be discussed

8. The max size of the file can be restricted by changing the size in the property 'Maximum File Size' Typical size is 5120

9. The height of the file can be adjusted by adding the required height in the 'Height' property.

10. The types of files that will be accepted can be decided in the property'Accepted File Types', this is done by adding the file extension names of the accepted files, e.g. .pdf, .docx etc.

The file Attachment takes a lot of space in the browser window, and it is advicable not to add it to a Group element, since it has it own borders.

Vedhæft bilag

Filnavn		Browse...
	Vedhæft	

Efter klik på 'Vedhæft': Vent venligst til bilaget er fremkommet i listen herunder. Dette kan tage et stykke tid, afhængigt af filens størrelse, din internetforbindelse mv.

Filnavn	Dato	Type	Størrelse	Slet

Ingen filer er vedhæftet

This is how File Attachment looks in the browser

A pop up window as seen in File section pops up when the user clicks the 'Browse..' button.

Divider

A *Divider* is a horizontal line that splits the page into sections.

Dividers can be very useful for creating an overview by visually separating questions or s-ections from each other.

In the browser, a divider is displayed as a thin dashed line.

First name	Middle name	Last name
TekstField0	TekstField1	TekstField2

Date of the purchase agreement

TekstField3

Note that this may be different from the date on the mortgage.

Amount in dollars

AmountTextField

Zip code	Town
PostalCode	PostalDistrictName

Divider separating to sets of information, as it appears in the Layout window.

Information about the purchaser

You will now be asked to enter information about the purchaser. This information can be found in your purchase agreement.

First name   Middle name   Last name   *

Date of the purchase agreement

Note that this may be different from the date on the mortgage.

Amount in dollars

Zip code   Town

In the browser, a Divider appears as a thin dashed line.

To create a Divider

11. Drag a *Divider* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Divider*.

Placeholder Text

Placeholder text is used to display a message or hint as to the field's pupose. The text is displayed inside the textbox it's self and disappears when the field has contains data or the user starts typing. An example placeholder text for a *First Name* field would be "Please enter your first name". In **Error! R eference source not found.** the placeholder feature is shown.

First name   Middle name

First name

The field 'First name' contains a Placeholder text, the field 'Middle name' does not

Annotation

The *Annotation* form element allows users to add notes to a field on the form but not change already added notes.

The element is added to the page like other element types. It is possible to modify the size and to placement in the Layout Editor.
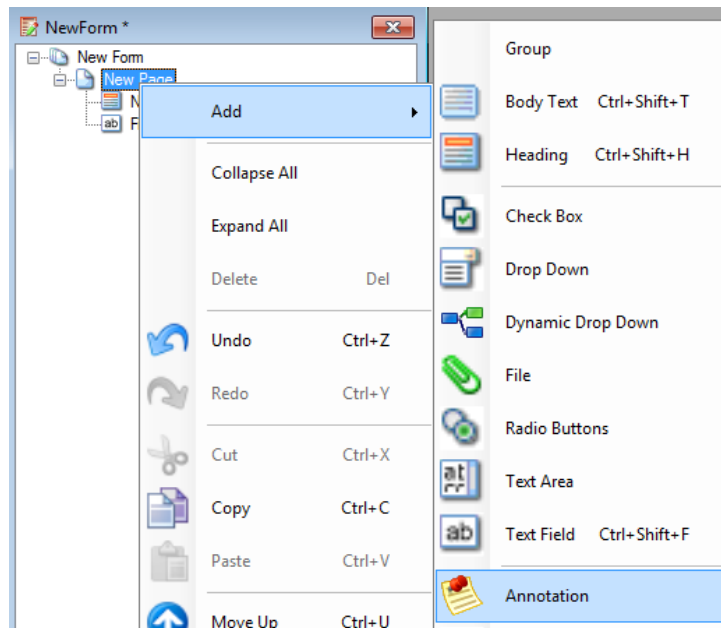
Adding an annotation at design time
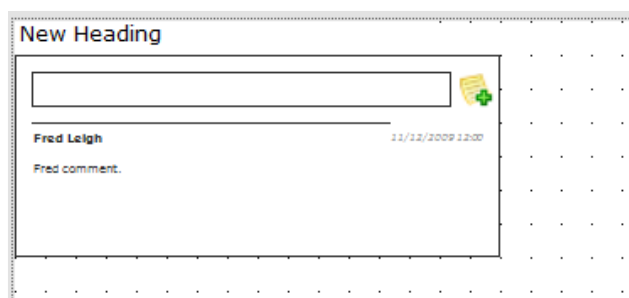
Modifying the layout of the annotation element in the Layout Editor
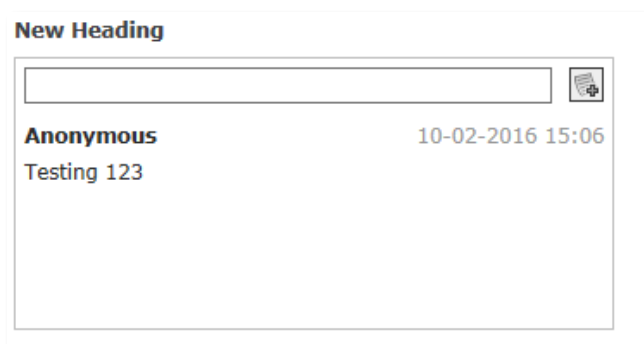
Annotation comment after adding a comment

Help Text

Help texts are intended for providing information that only some users may want to access. This may be because they are in doubt about how to fill out a field, because they belong to a group with specific needs, etc.

A *Help Text* is represented by a link that the user clicks on in order to bring up the help text itself. This makes it easier for users who do not need help to ignore the extra material and move quickly through the question-naire.

In the *Layout* window, the text of the link is displayed in italics and the help text itself in normal text. In the user's browser, the link will appear with standard link typography (blue and underlined), and the help text will initially be hidden.

In the Properties window for the Help Text, type in the desired texts for the link (under Help Link Text) and for the Help Text

This text is taken from the Help Link Text -property.

This text is taken from the Help Text -property.

A Help Text as it appears in the Layout window.

The same Help Text as it would appear in the browser, after the link has been clicked on.

To create a Help Text with supplementary information

1. Drag a *Help Text* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Help Text*.
2. In the *Properties* window for the help text, type the desired text for the link into the *Help Link Text* property. This is the text that will appear to the user and will indicate that help is available if he or she clicks on the link.
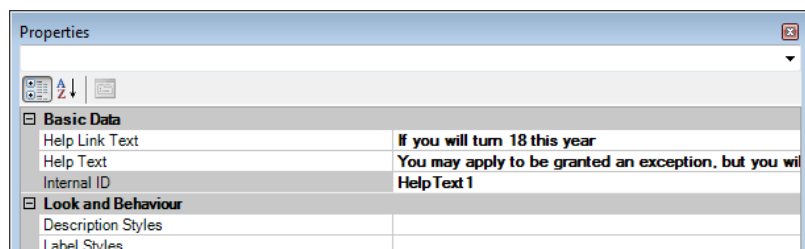3. Type the help text itself into the *Help Text* property.

HTML

When you enter text directly in the Properties window, Form Designer only lets you use a few basic HTML tags. With an HTML element, you can use any HTML tags you want to – for example, to create a bulleted list like this one.

To create a text that includes HTML code

1. Drag an *HTML* element from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > HTML*.

2. In the *Properties* window, click on the "..." symbol in the *HTML* property. This opens an HTML editor in which you can enter the code you need.
3. Click on *OK* to save the text you entered and close the HTML editor.
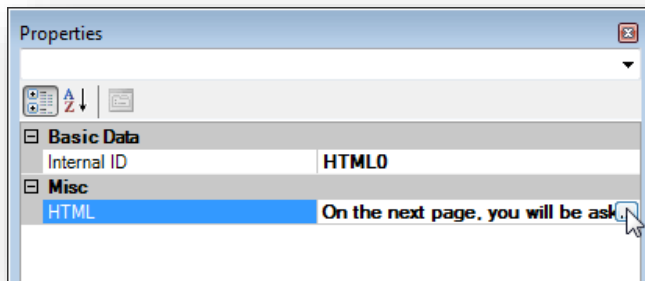
Click on the "..." symbol in the HTML element's HTML property to open an HTML editor.
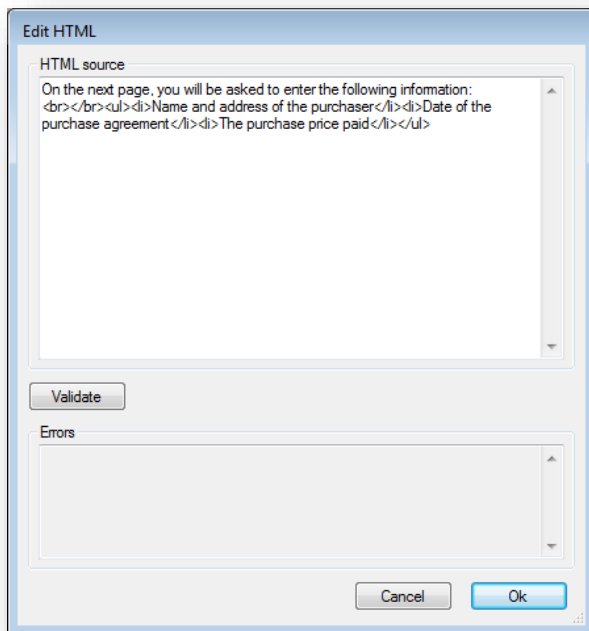
In the HTML editor, you can enter whatever code you need.

Iframe

An *IFrame* is used for displaying an external web page directly in your workflow. The page can come from any location.

If you just want a link that users can click on to jump to another web page, use a *Link* element instead..

- **To include a web page by using an IFrame**
1. Drag an *IFrame* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > IFrame*.
2. In the *Properties* window, enter the URL of the desired web page as the *URL* property.
- The easiest and safest way to do this is to copy the URL from your browser and paste it directly into the *Properties* window.

- You can, of course, also type the URL in.

Basic Data	
Internal ID	Iframe0
Look and Behaviour	
Styles	
Misc	
Get Project Variable	False
Get User Variable	False
URL	http://en.wikipedia.org/wiki/HTML
Variable Name	

Enter the URL of the desired web page in the URL property of the IFrame element.
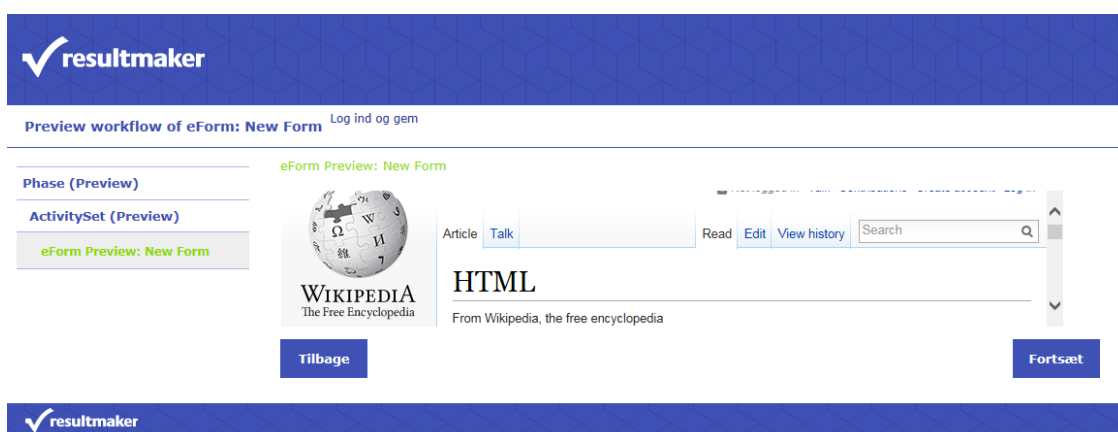
You can easily display an external web page directly in your workflow by using an IFrame. Unlike a static screen shot, the IFrame shown above has functional scroll bars, allow-ing users to view the entire contents of the inserted web page

Link

The *Link* element lets you create a link to another web page. The page is displayed when the user clicks on the link.

If you want the page to be an integral part of your workflow, use an *IFrame* element instead.
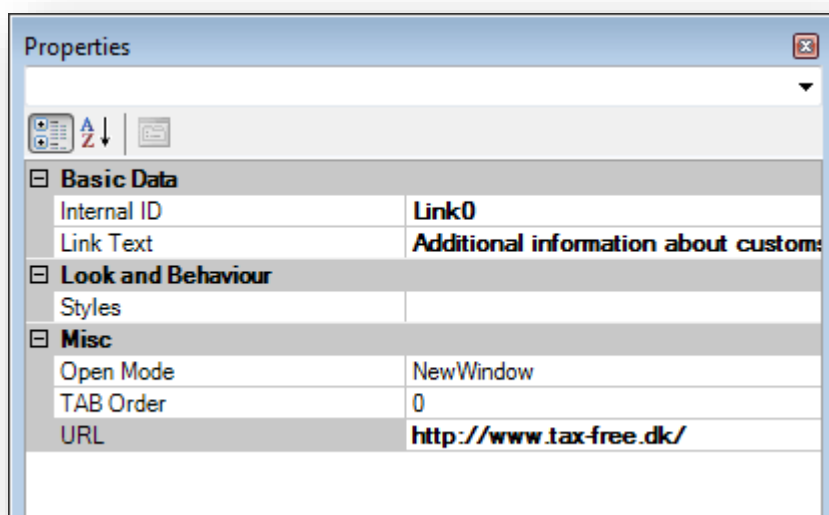
Links are useful for directing users to supplementary information. In the browser, a Link is displayed with standard link formatting.

To create a link to an external web page

1. Drag a *Link* from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Link*.
2. In the *Properties* window, type the desired text for the link into the *Link Text* property.
3. Enter the URL of the desired web page as the *URL* property.
   - The easiest and safest way to do this is to copy the URL from your browser and paste it directly into the *Properties* window.
   - You can, of course, also type the URL in.
4. For the *Open Mode* property, select *NewWindow* if you want the web page to open in a separate window (recommended) or *Self* if you want it to open in your workflow's window.

Enter the URL of the desired web page in the URL property of the Link element. Use the Open Mode property to specify whether you want the external web page to open in a separate window (recommended) or directly in your workflow's window.

Picture

You can add images to your layout by using the *Picture* element.

To add an image to your form, use a Picture element. Right click the Page, choose Add and select Picture.
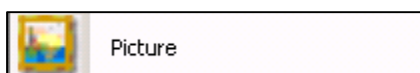
The Property grid for the Picture element look like this:
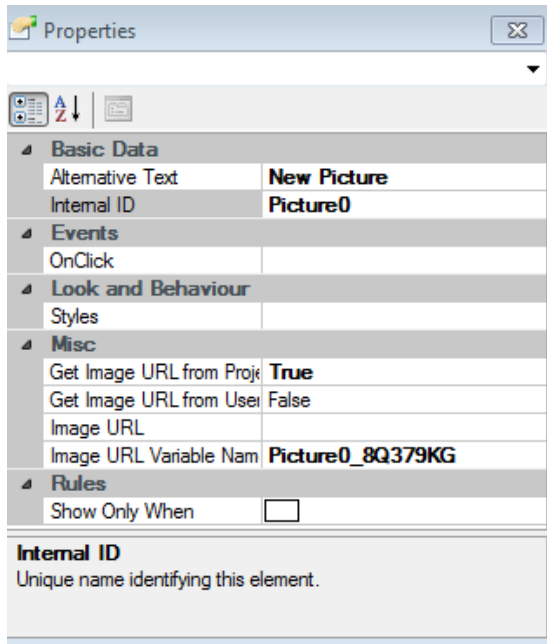
In the Property grid, enter the URL of the desired image in the Picture element's *Image URL* property. Note that all pictures must be located in the public folder of your Process Platform server and that you should use a relative URL that starts with */public/* i.e. */public/myImage.png*.

To make an image available for use in your workflows
1. First make sure the image has the desired size and format, because these cannot be edited in Process Designer.
2. Manually copy and paste the image into the *public* folder of your Process Platform server.
- The path to the *public* folder is: *C:\FileRepository\public\ or C:\instances\[instance name]\FileRepository\public* where *[instance name]* is the name of the Process Plaform instance.
- If you want to set up image folders or subfolders with other names to systematize your images, put the new folders inside the *public* folder.

To add an image to the layout
1. Drag a *Picture* element from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Picture*.
2. In the *Picture* element's *Properties* window, type the URL of the desired -image into the *Image URL* property.
- Use a relative URL, i.e., one that starts with */public* and contains the rest of the path to the desired image. For example, if the image is called *handshake.gif* and is located in a subfolder called *companypictures*, its relative URL will be: */public/companypictures/handshake.gif*
- Remember to include the slash before *public*.

Date Selector Extender

A date selector is a small icon that looks like a calendar page. When the icon is clicked, an interactive calendar is displayed in which the user can click on a date. The chosen date is automatically transferred to the text field that the date selector refers to.

The date selector is a handy and popular feature for users, so we recommend using it whenever possible. It will also ensure that all dates entered in the text field have a consistent format (determined by the Windows operating system for your area).

To create a date selector, you drag a *Date Selector Extender* from the *Toolbox* into the *Layout* window and then use properties to connect it to the relevant text field.
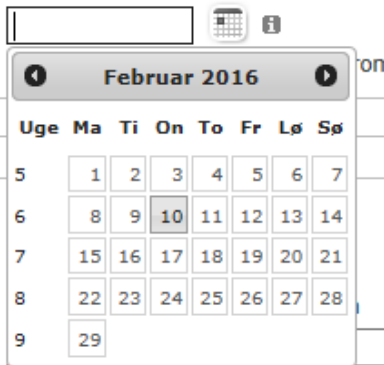
A Date Selector Extender is represented in the browser by a small calendar icon. When the user clicks on the icon, an interactive calendar is displayed.

In the Layout window, the Date Selector Extender looks like this. It should be placed just to the right of the text field it refers to.
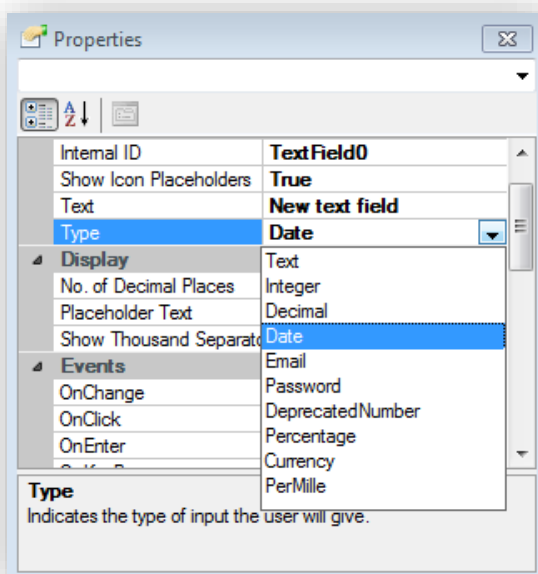
Set the text field's Type property to Date.
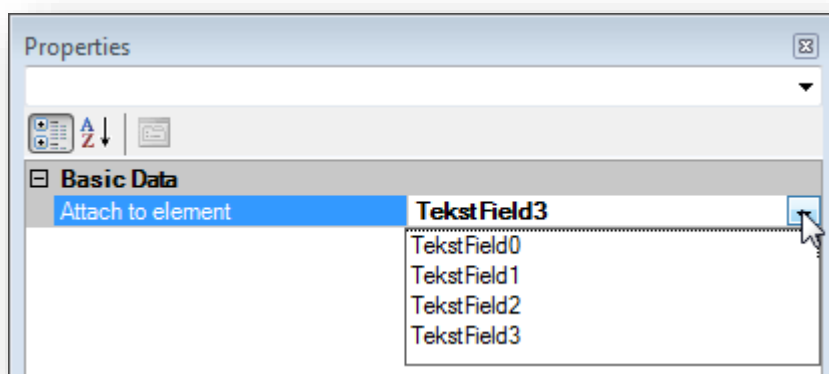
Then attach the Date Selector Extender to the text field by selecting the relevant field from the menu in the Date Selector Extender's Attach to element property.

- **To attach a Date Selector Extender to a Text Field**
1. If the text field does not already exist, drag a *Text Field* element from the *Toolbox* into the *Layout* window, or right-click on the page name in the form window and select *Add > Text Field*.
2. In the *Properties* window for the *Text Field*, set the *Type* property to *Date*.
3. Drag a *Date Selector Extender* from the *Toolbox* into the *Layout* window and place it just to the right of the text field.
4. In the *Properties* window for the *Date Selector Extender*, use the menu in the *Attach to element* property to select the relevant text field.

Description Extender

In Form Designer, a *Description* is a mouse-over text that is displayed when the cursor is held over an element. A small blue information icon next to the element alerts users to the fact that a description is available. The description is an integral part of the element it describes. Its text is taken from the *Description* property for that element.

You can choose to have an element's description text visible all the time, rather than as a mouse-over, by using a *Description Extender*. The advantage of using a *Description Extender* instead of a *Body Text* is that the text is part of the element it describes and will move with it, while a *Body Text* is an independent element.
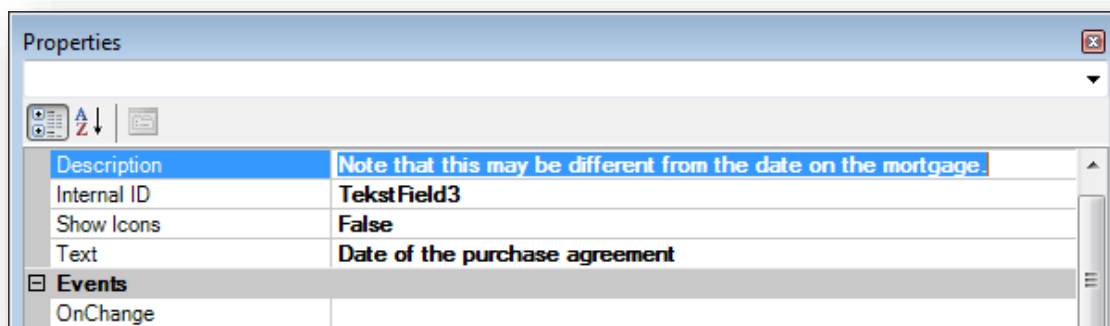
To create a Description that is visible all the time, start by entering the text of the Description in the relevant element's Description property and setting the Show Icons property to False.
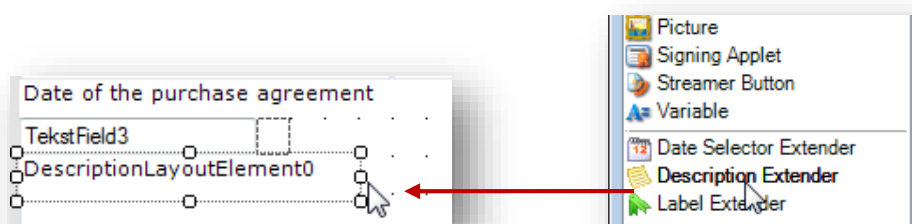
Drag a Description Extender into the Layout window and place it where you want the text to be displayed.
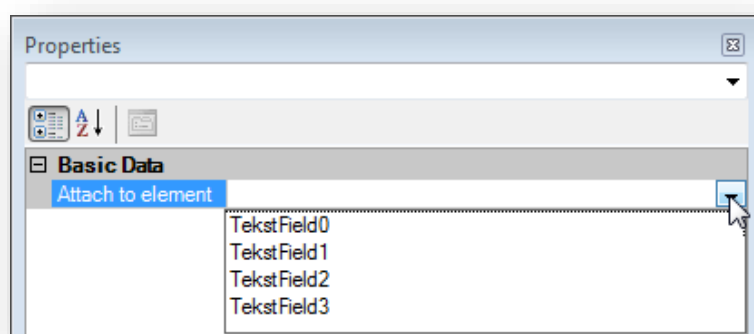
For the Description Extender's Attach to element property, select the relevant element from the menu.
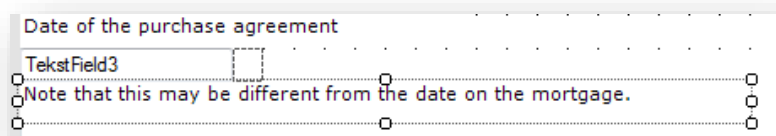
In the Layout window and browser, the Description text will now appear as an integral part of the page, instead of being represented by an information icon.

- **To create a Description that is visible all the time**

1. In the *Properties* window for the element, type the desired text into the *Description* property.
2. Set the *Show Icon Placeholder* property to *False*.
3. Drag a *Description Extender* from the *Toolbox* into the *Layout* window and place it where you want the text you entered in step 1 to be displayed.
4. In the *Properties* window for the *Description Extender*, use the menu in the *Attach to element* property to select the relevant element.

Label Extender

Many elements in Form Designer consist of two parts, for example, a check box and its associated text, or a text field and its associated heading or name.

The text string associated with an element is called its label.

If you delete a label from the layout and then realize that you want to display it after all, you can recreate it by using a *Label Extender*.
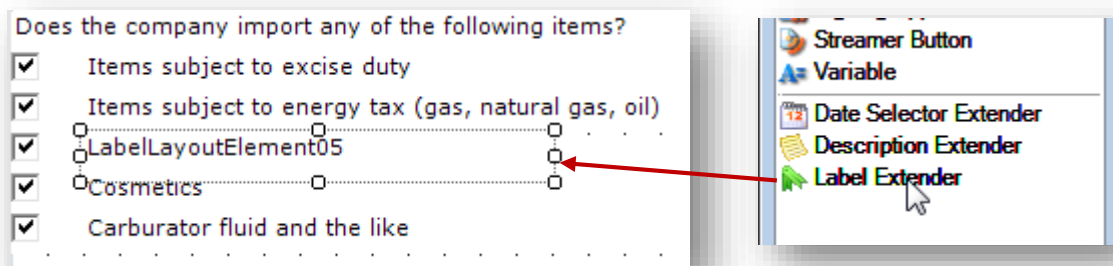
Drag a Label Extender into the Layout window and place it where you want it to be displayed in the browser.
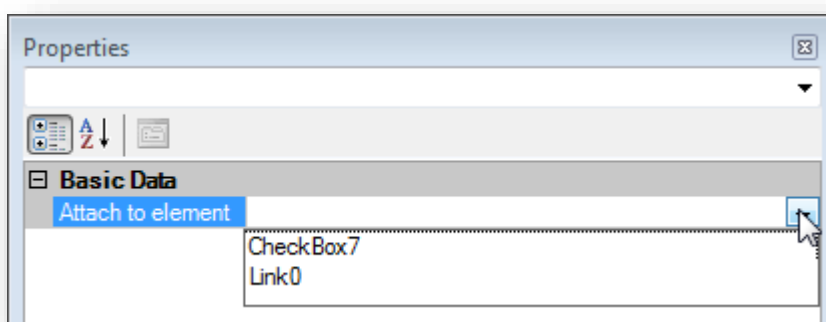
Attach the new label to the relevant element by selecting the element from the menu in the Label Extender's Attach to element property.

To replace a label that was deleted

1. Drag a *Label Extender* from the *Toolbox* into the *Layout* window and place it where you want the text to be displayed.
2. In the *Properties* window for the *Label Extender,* use the menu in the *Attach to element* property to select the relevant element.

# Modifying layouts in Form Designer

Once you have created the elements you need, you may want to resize them or move them around. This chapter explains the basics of working with layout in eForm -Designer. For additional tips concerning the *Layout* window, see "The Layout window" in Part A of the "Tutorial and Basic Information" chapter.

The layout grid

The *Layout* window has a grid to help you keep elements in alignment. When you move or resize elements, they snap to the grid.

The default position for elements

In Form Designer, each element inserted via the form window is placed directly under the existing elements and at the left-hand edge of the page.

The reason for this is that studies of web behavior show that most users orient them-selves on the page by skimming down the left-hand margin to get a quick overview. Often, they do not read more than a few words per line.

Although you can place elements anywhere you want them, taking this typical user behavior into account will help people fill out your e-forms quickly and efficiently. There are, however, cases (such as address fields) where it makes sense to group -elements horizontally across the page. See also "Moving an element" below.

Adding an element

You can add new elements to a layout in two ways:
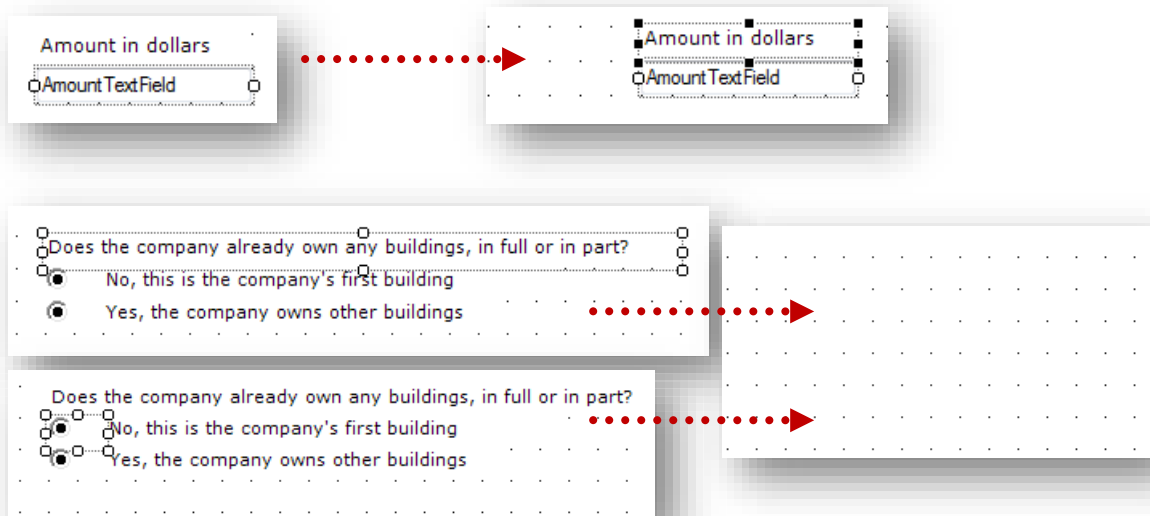
- By using the right-click menu in the form window.
  - In the Layout window, the new element will be placed directly under the existing elements and aligned with the left margin.
- By dragging an element from the *Toolbox* directly into the desired location in the *Layout* window.
  - In the form hierarchy, the element will be placed at the bottom of the page or group you dragged it to.

Synchronizing the order of elements in the form and layout

The data structure of the elements in a Form Designer form is defined by their placement in the form hierarchy. Moving elements around in the *Layout* window will change the appearance of the e-form in the browser, but it will not affect the order in which the elements are displayed in form data or on the receipt unless you make the corresponding changes in the form window. Similarly, changing the order of existing elements in the form hierarchy will not change their placement in the *Layout* window.

Form Designer's default width for labels may mean that you have to expand some of them manually in the Layout window to be able to see all of the text.

To move or delete an element together with its description and/or label, start by clicking on the element itself.

To move or delete only the description or label, without moving the element it refers to, start by clicking on the description or label.

To keep the two views synchronized, be sure that changes are made in both windows.

- *Ctrl+U* moves an element up in the form hierarchy.
- *Ctrl+D* moves an element down in the form hierarchy.
- An element can be dragged into a different group or page with the mouse.

Default widths for labels and other texts

For certain elements (text fields, text areas, check boxes, drop downs, radio buttons and help texts), the *Layout* window shows both the element itself (whose name in the case of text fields and text areas corresponds to the *Internal ID* property in the ele-ment's *Properties* window) and its label (whose name corresponds to the *Text* property in the *Properties* window).

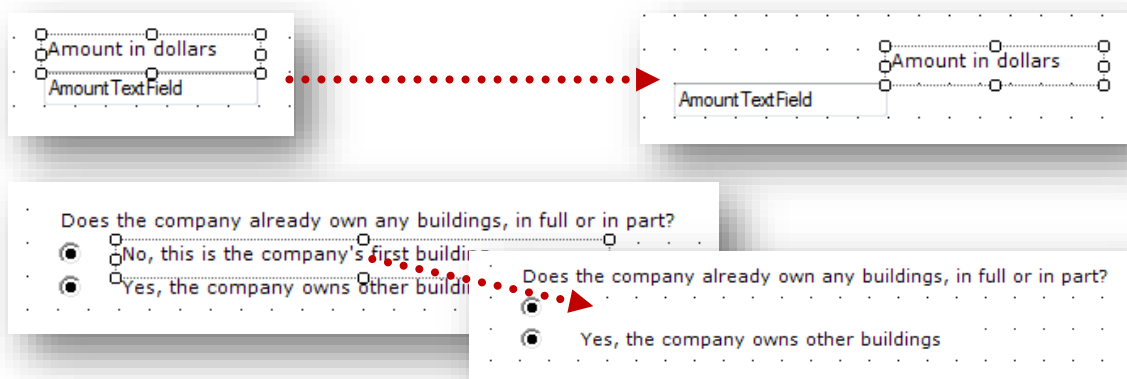Form Designer assigns a default width to labels. The width is the same as that of a standard text field, which is the most common element you will be using in your forms. Similarly, when you create text in the form of a heading, body text, or description, the element initially has a standard width.

If the text of an element or label is too long to fit into the available width, it will be wrapped to form additional lines in the browser, so no text is lost. But in the *Layout* window, it will appear cut off, You can easily expand the available width or height by clicking on the item and dragging its handles with the mouse. This will change the item's size both in the browser and the *Layout* window.

Note that, in general, it is a good idea to keep label texts as short as possible.

Moving an element

Use the *Layout* window to move elements into the desired positions. You can also move elements out of the way temporarily while you work with other parts of the layout.

- To move an element, click on it and then either place the cursor in the center of the element and drag it, or use the arrow keys on your keyboard.
- If you click on the element itself, any related label or description will move with it.
- If you click on the element's label or description, you can move the label or description without moving the element. The label or description will still be attached to the element and will move with it if you later move the element.
- For best results, let the grid help you place elements directly under each other or with maximum one blank line between them.
- When placing elements next to each other in the same line, leave no space between them. Form Designer will automatically create a little space.
- For maximum readability, place labels above the text fields, text areas or other elements they refer to (default), rather than to the left of the element.
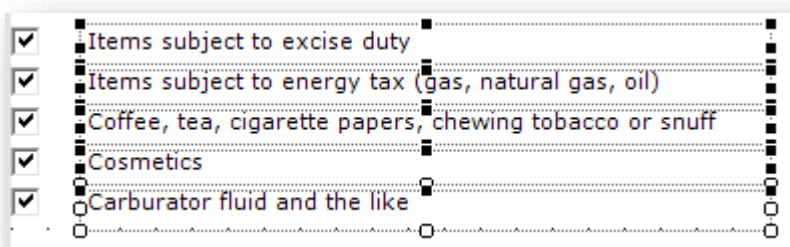
You may need to change the size of an element in the Layout window to make its whole text visible. Multiple texts (or other elements) can be resized together if they are in the same group or at the root level of the same page. Check that all the desired elements have been selected, and then drag any one of them with the mouse.
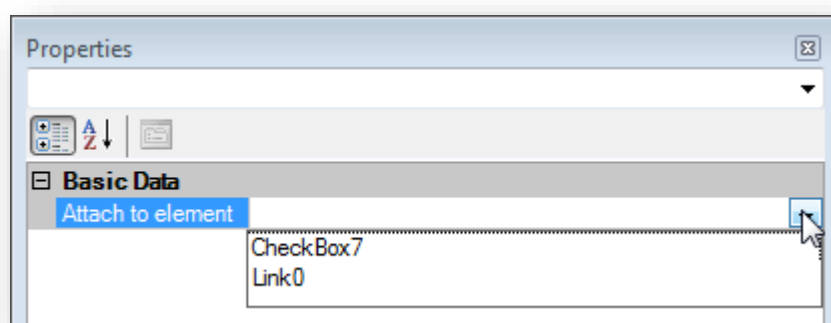
If you accidentally delete a label, you can create a new one. Drag a Label Extender in from the Toolbox and place it as desired. Then select the relevant element from the menu in the Label Extender's -Attach to Element property.
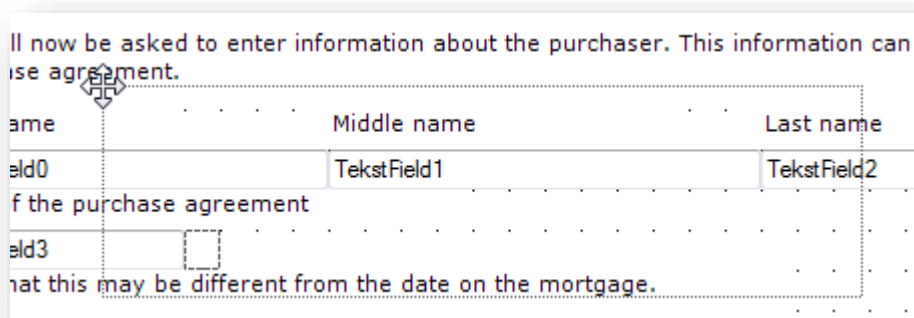
One way to select multiple elements before moving, resizing or deleting them is to drag a selection box around them. Before carrying out the desired operation, check that only the desired elements have been marked!

Changing the size of an element
- To resize an element, click on it and then either drag its square white handles with the mouse or hold down the shift key and use the arrow keys.

Deleting an element
- To delete an element, click on it and then press the Delete key on your keyboard.
- If you click on the element itself, any related labels or descriptions will be removed along with it.
- If you click on the element's label or description, you can delete the label or description without removing the element itself.
- If you accidentally delete a label, you can create a new one. Drag a Label Extender from the Toolbox into the Layout window. Then attach it to the element by selecting the element's name in the label extender's Attach to Element property.

Acting on multiple elements at the same time
You can select multiple elements in the *Layout* or form window and then move, resize or delete them as a group, *provided that the elements are at the same level of the hierarchy* (i.e., in the same group or directly on the same page). There are several ways to do this:

In the Layout window
- Click on one element, hold down the shift or Ctrl key and click on the other -desired - elements.
- Use the mouse to drag a selection box around the desired elements.

In the form window
- To select elements that are next to each other in the hierarchy, click on the first element, hold down the shift key and either click on the desired last element or use the up or down arrow key to mark additional elements.
- To combine elements freely, click on the first element, hold down the Ctrl key and click on each of the other desired elements.
- When a node in the hierarchy is marked, you can expand or collapse it by -using the right and left arrow keys, respectively. This corresponds to clicking on the plus symbol at the left of the node.
- If you hold down the Ctrl key, you can use the up and down arrow keys to scroll through the form window while selecting. This is particularly useful if the page or group is too long to be displayed in the window at a single time.

Heading →

Maritial status

Question with answers →

Are you now or have you been maried?　　　　*

○　Unmarried

○　Married or living in a common law marriage

○　Previously married

Supplementary text with link to →

To apply, you must be familiar with the regulation no. 564/1996. To read the full text of the regulation, click on the folliwing link.

Regulation no. 564/1996

Submitter's declaration

I confirm that I am familiar with the Regulation No. 564/1996 and that the regulation applies to me as defined in the corresponding instructions. Furthermore, I confirm that I am over 18 years of age as required by section 32, paragraph 3 of the regulation.

Statement →

☐　I confirm

"Must Read" text style →

Note that you can only apply if you have never been married.

Help Link →

If you will turn 18 this year

Help Text that appears when the link is activated →

You may apply to be granted an exception, but you will not receive the subsidy until the end of the year. Enter your current age and submit the application. We will notify you when the subsidy has been transferred to your account.

Examples of text written in "layers"

Maximizing user-friendliness

By following some generally accepted guidelines for writing texts and laying out pages, you can greatly increase the accessibility of your workflow solutions to users. This chapter summarizes some of the most effective techniques, based on the principle of "layering."

Write in layers

When people use the Internet, they tend to read texts in fragments and are more likely to skim and skip around than when they read printed material. For this reason, you should organize your texts in "layers."

Writing in layers means that you let users dig more or less deeply into the text, depending on their interests and needs. To achieve this, you split the text into chunks, each of which has its own function and some of which may only be revealed if the user specifically activates them. This allows users to focus on what is relevant for them.

Writing in layers helps you build workflows that simultaneously meet the needs of different kinds of users. For example:

- Quick users, who fill in the e-form quickly and expertly.
- Thorough users, who read everything on the screen.
- Curious users, who tend to seek additional information.

Layer 1: Headings structure the page

What to use: *Heading; Body Text* with the *"Emphasize" style* or *"Heading 2" style*

Headings are an important part of the structure of your page. They serve as atten-tion-getters and navigational landmarks for the reader. By splitting text and graphics into manageable chunks, headings make it easier for users to skim the page.

- Use a *Heading* element if you want the heading to be included in the receipt.
- Use a *Body Text* element with the *Emphasize* style if you only want to create a visual landmark on the page and don't want the heading to be included in the receipt. The type size is a little smaller than a *Heading*.
- Use a *Body Text* with the *Heading 2* style to split a long text passage up with subheadings. The type size is a little smaller than the *Emphasize* style.

Layer 2: Questions with answers or statements ease interaction

What to use: *Heading; Text; Option for Drop Down or Radio Button*

Well written questions and answers go a long way towards helping users fill out an e• form without difficulty. Some users will be able to navigate exclusively via these elements, without needing additional explanations.

Age

Choose here ⌄

According to law, you must be over 18 to make an application.

If in doubt, see State law pertaining to the purchase of real estate

If you will turn 18 this year

Examples of Help Link Texts as they would appear in the browser. Note how the text at the bottom specifies the group of users for which it is relevant.

First name   Middle name

First name | Note that this may be
                 | different from the
Date of the purcha | date on the mortgage.

Note that this may be different from the date on the mortgage.

Typical Description (mouse-over) texts as they would appear in the browser.

You will now be asked to enter information about the purchaser. This information can be found in your purchase agreement.

First name   Middle name   Last name

First name   *

A typical explanatory text as it would appear in the browser.

Layer 3: Help and advice eliminate doubt

What to use: *Body Text; Help Text; Description (mouse-over text)*

Different users need different levels of information and assistance. By anticipating their needs, you can minimize the amount of effort people will need to fill out your forms.

Help Texts

A *Help Text* is placed next to a question and is represented in the first instance by a link the user can click on. The help text is displayed when the user clicks on the link and disappears when he or she clicks on the link again.

Help texts are most relevant when the answer to a question is not obvious. If there are several help texts, place them together at the end of the question.

The text of the link itself should be as clear and helpful as possible. Instead of a gene-ric text like "Help" or "Read more," write something related to the specific situation, such as "What requirements must you fulfill in order to be eligible". If the supplementary information is only relevant for certain users, mention the target group in the text.

Descriptions (mouse-over texts)

In Form Designer, a *Description* is a mouse-over text: a text that appears when the cursor is held over an element and disappears when the cursor is moved away. Descriptions are typically used to explain how users should fill out a field. Usually, this means a short example, short explanation or a description of the required format. The text in a *Description* should be kept very short, since the text will disappear if the user moves the mouse away from the "information" icon.

Explanatory texts ("open" Descriptions)

Unlike mouse-over texts, which only appear when the user activates them with the mouse, explanatory texts are displayed as an integral part of the -layout.

Explanatory texts can be used for several purposes:

- To explain the reporting process to the user, especially in long reports. This is particularly relevant if the user has to submit multiple types of information on multiple pages.
- To inform users that they will need to have certain documents or information available while filling out the form.
- To give users information that will help them answer a question or fill out a field. If the information is only relevant for certain users, mention the target group in the text.

Date of the purchase agreement

Note that this may be different from the date on the mortgage.

A typical note as it would appear in the browser.

Social Security no.

This information will not be given to a third party

A "demystifying" text explains to the user why certain information is needed or how it will be used. Its purpose is often to reassure skeptical users that their data will not be misused.

I confirm that I am familiar with the Regulation No. 564/1996 and that the regulation applies to me as defined in the corresponding instructions. Furthermore, I confirm that I am over 18 years of age as required by section 32, paragraph 3 of the regulation.

I confirm

Note that you can only apply if you have never been married.

Use Form Designer's "Must Read" style only for important messages that must not be overlooked.

To apply, you must be familiar with the regulation no. 564/1996. To read the full text of the regulation, click on the folliwing link.

Regulation no. 564/1996

Example of a supplementary text with a link to even more information.

Remember, NB and Note

If you need to draw the user's attention to something in connection with a question, you can add a short text starting with "Remember!", "NB!" or "Note:"

You may want to apply the *Emphasize* style to make the note stand out visually from the rest of the text.

Texts that demystify or reassure

In some cases you may want to explain why specific information is needed or what will or will not be done with it. This may, for example, be useful to reassure users that their personal data will not be passed on to third parties.

"Must Read" texts

Must Read Text is a standard typography choice in Form Designer that can be applied via the *Style* property of a *Body Text* element. The *Must Read Text* style is visually very different from the other available styles and should only be used for important warnings. Otherwise, the effect will be lost.

Layer 4: Supplementary texts with links to further reading

What to use: *Body Text; Link*

Some users are curious about more information, and some seek additional explanations before answering an item, especially if they are worried about submitting personal information. Other users do not want to be forced to read large amounts of text before moving to the next step. By using supplementary texts, you can fulfill the needs of both groups.

Supplementary texts provide additional information, and may include links to external texts. They are typically used for information such as regulations and legal explanations that only some users will access, but that can be valuable for them to have. Supplementary texts can easily be ignored by users who are not interested in going deeper.

Since supplementary texts are typically used to learn more about a topic before answer-ing an item on a form, they should be placed very close to the elements they refer to, and after any other texts related to the element.

To have the external text appear in a separate window when the user clicks on the link, set the link's *Open Mode* property to *New Window*. This will make it easier for the user to navigate back to the e-form after reading the supplementary information.