Form Builder

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Table of Contents

1 Current Functionality (CDC Form)
- 1.1 Access and edit the Form from CDC Form Tab
- 1.2 Print the Form from the CDC Form Tab
- 1.3 Search for information entered in the CDC Forms
- 1.4 Export CDC Forms
- 1.5 Audit Trail when the CDC Form is edited.

2 New Custom Forms

3 Creating and Defining a new Custom Form
- 3.1 Create the Form

4 Form Builder
- 4.1 Navigation through Icons
- 4.2 Page Layout

5 Adding Sections
- 5.1 Adding Sections
- 5.2 Editing a Section Name
- 5.3 Resizing a Section/Table/Fieldset
- 5.4 Reorganizing a Section (Drag and Drop)
- 5.5 Deleting a Section

6 Adding Form Elements
- 6.1 Adding a Form Element
- 6.2 Editing a Form Element
- 6.3 Reorganize Form Element (Drag and Drop)
  - 6.3.1 Moving Form Elements of Type Question within the Left Panel
  - 6.3.2 Moving Form Elements of Type Question from the Left Panel to the Right Panel
  - 6.3.3 Moving Form Elements within the Right Panel
  - 6.3.4 Moving Form Elements of Type question from the Right Panel to the Left Panel
  - 6.3.5 Visual Indicator while dragging (New in Feb 2016 Release)
- 6.4 Types of Form Element Supported
  - 6.4.1 Free Text Question
    - 6.4.1.1 Free Text Question (Format: Plain Text)
    - 6.4.1.2 Free Text Question (Format: Plain Text Multi-Lines)
    - 6.4.1.3 Free Text Question (Format: Date) (New in Feb 2016 Release)
    - 6.4.1.4 Free Text Question (Format: Month/Year) (New in August 2016 Release)
    - 6.4.1.5 Free Text Question (Format: Phone)
    - 6.4.1.6 Free Text Question (Format: Number) (New in Feb 2016 Release)

6.4.1.7 Free Text Question (Format: Number with Decimal Point) (New in Feb 2016 Release)
6.4.1.8 Free Text Question (Format: Time Military) (New in Feb 2016 Release)
6.4.1.9 Free Text Question (Format: Email) (New in Feb 2016 Release)
6.4.1.10 Free Text Question (Format: Zip Code) (New in Feb 2016 Release)
6.4.2 Dropdown Question
6.4.3 Multi Select Question
6.4.4 Checkbox Question
6.4.5 Core Data Question (New in Feb 2016 Release)
6.4.6 Label Form Element (New in Feb 2016 Release)
6.4.7 Read Only Text Form Element (New in May 2016 Release)
6.4.8 Fieldset Form Element (New in Feb 2016 Release)
6.4.9 Table Form Element (New in Feb 2016 Release)
6.4.10 Form Element Label Location (New in Feb 2016 Release)

7 Copy and Paste (New in Feb 2016 Release)

8 Question Interactions (New in Feb 2016 Release)
8.1 Check boxes state change (New in Feb 2016 Release)
8.2 Dropdown/MultiSelect select change (New in Feb 2016 Release)
8.3 Address Geographical Mapping Autocomplete (New in May 2016 Release)

9 Form Builder Context Menu (New in May 2007 Release)

10 Form History/Reverting Changes

11 Versioning/Promote to Production Section
11.1 Preliminaries
11.2 Promote to Production
11.3 Promotion to Production (Special Scenario)
11.4 Versioning

12 Editing a Form that was Promoted to Production
12.1 Highlight production Questions
12.2 Editing Existing Free Text Question
12.3 Editing Existing Dropdown/Multi Select Question
12.4 Deleting a question that was promoted to production

13 Disabling or Deleting a Form

14 Exporting/Importing Form Model
14.1 Exporting Form Model
14.2 Importing Form Model

15 Others
15.1 Form Lock for Edit
15.2 Usage
15.3 Cell Spanning (New in Feb 2016 Release)

15.4 Different Previews...
15.5 Left Panel vs Right Panel
15.6 Bulk Add

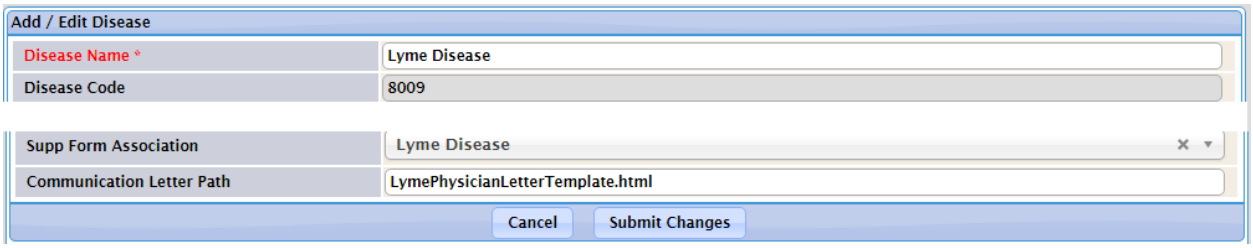
16 Using Supplemental Forms (Updated in Feb 2016 Release)
16.1 Associate a Supplemental Form to a Disease
16.2 Associate Supplemental Form to an Outbreak
16.3 Supplemental Data Entry within a Case
16.3.1 Single Supplemental Form Associated to a case
16.3.2 More than one Supplemental Form Associated to a case
16.3.3 No Supplemental Form Associated to a case
16.4 Outbreak and Supplemental Forms
16.5 Search Cases using a Supplemental Form
16.5.1 Supp Form Associated with a disease
16.5.2 Supp Form Associated with an outbreak
16.6 Export Supplemental Form

17 Outbreak Event Form (New in May 2016 Release)
17.1 Form Definition
17.2 Associate Outbreak Event Form to an Outbreak

18 Outbreak Summary Form (New in May 2016 Release)
18.1 Form Definition
18.2 Associate Outbreak Summary Form to an Outbreak

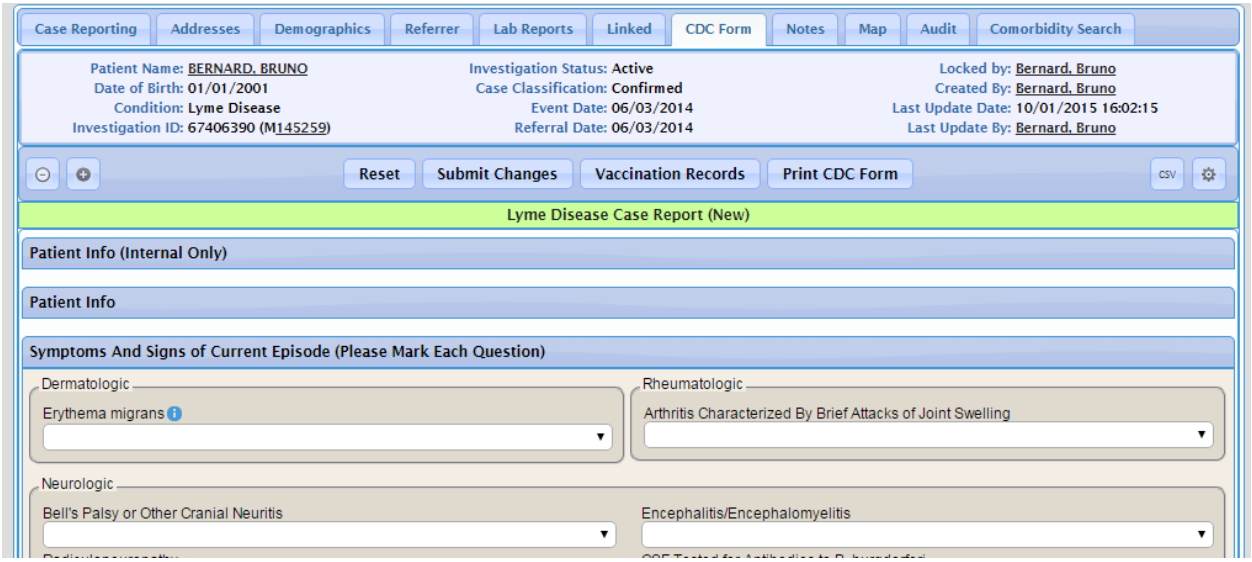
1 Current Functionality (CDC Form)

Currently, Sentinel has a preset number of Forms (CDC Forms). They can be associated to a disease through the disease code management. For example, the Lyme Disease CDC Form is associated with Lyme Disease:

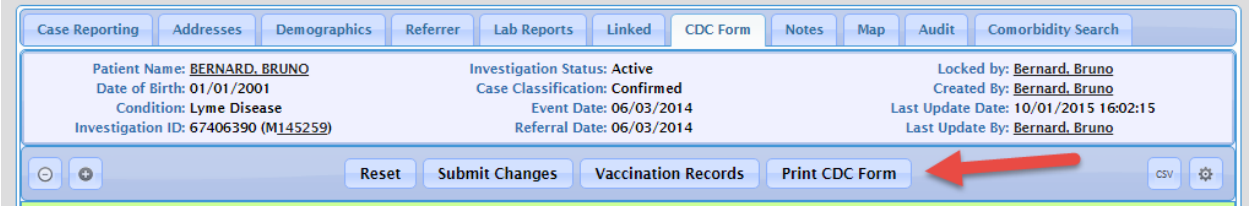


When the Supplemental Form (Supp Form) association is done, any user that can edit a Lyme Disease Condition can do the following:

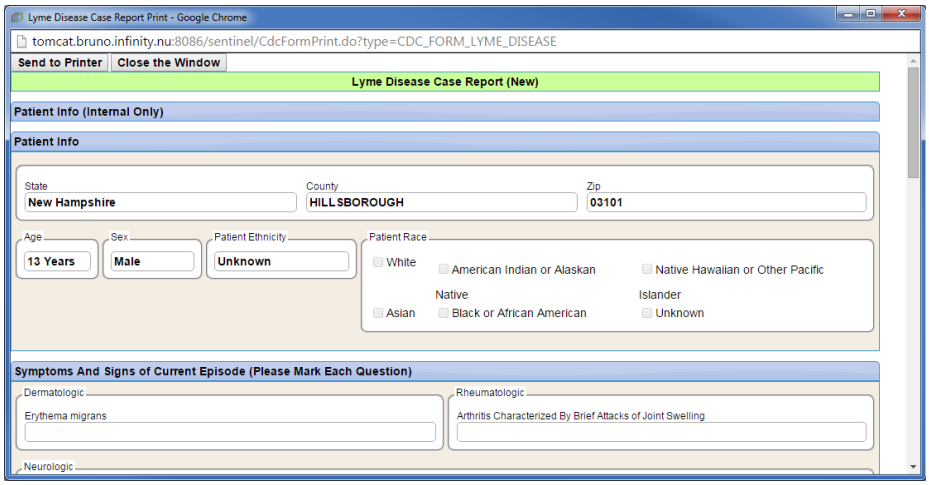
1.1 Access and edit the Form from CDC Form Tab



1.2 Print the Form from the CDC Form Tab

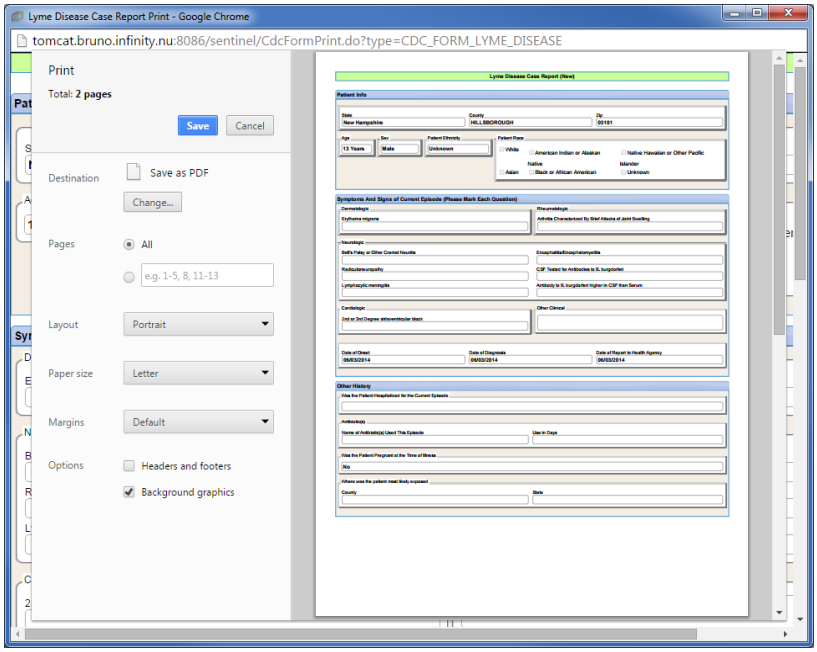


The following popup window will appear:



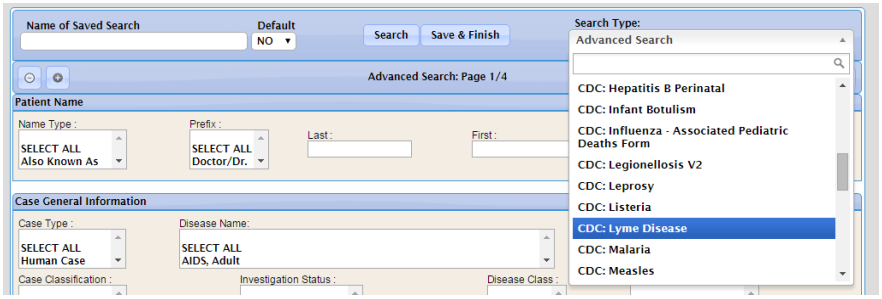
Note: You can collapse the section and it will not be included in the print out.

Print Overview:

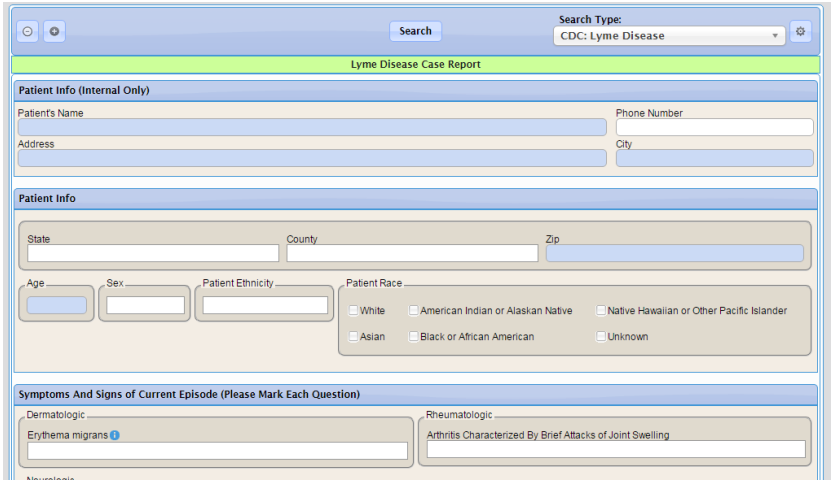


1.3 Search for information entered in the CDC Forms

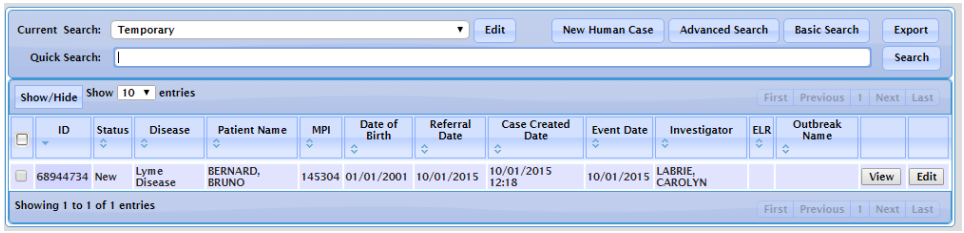
To search for information entered in the CDC Forms, return to the case listing page and click on Advanced Search.



You will see a list of all the CDC Forms. Select the one you want to search:

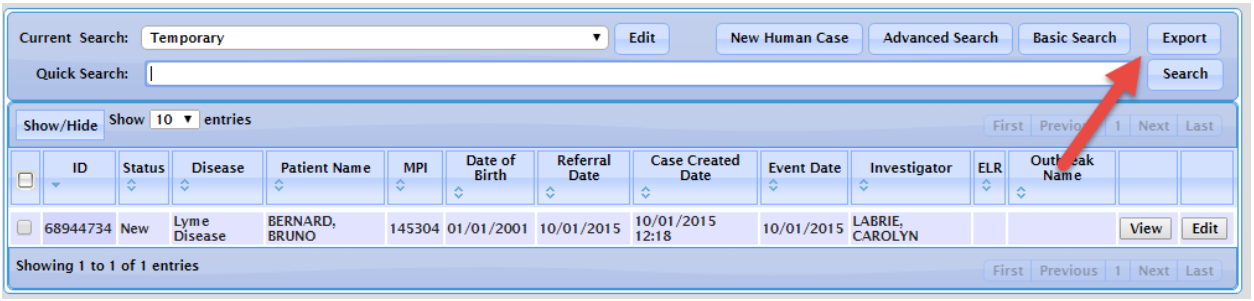


Note: The search form looks exactly like the data entry form with the exception of the date questions and the multi-select drop down menus. When searching a CDC form, the date questions become date ranges so you can narrow down your search criteria within a date range for a specific date question, such as birth date. You can also select more than one option for questions with drop down menus to broaden your search to include any cases with forms that contain that answer in the drop down.
You can enter your search criteria and click search. You will then be redirected to the case listing screen that will list all the cases that match your criteria:

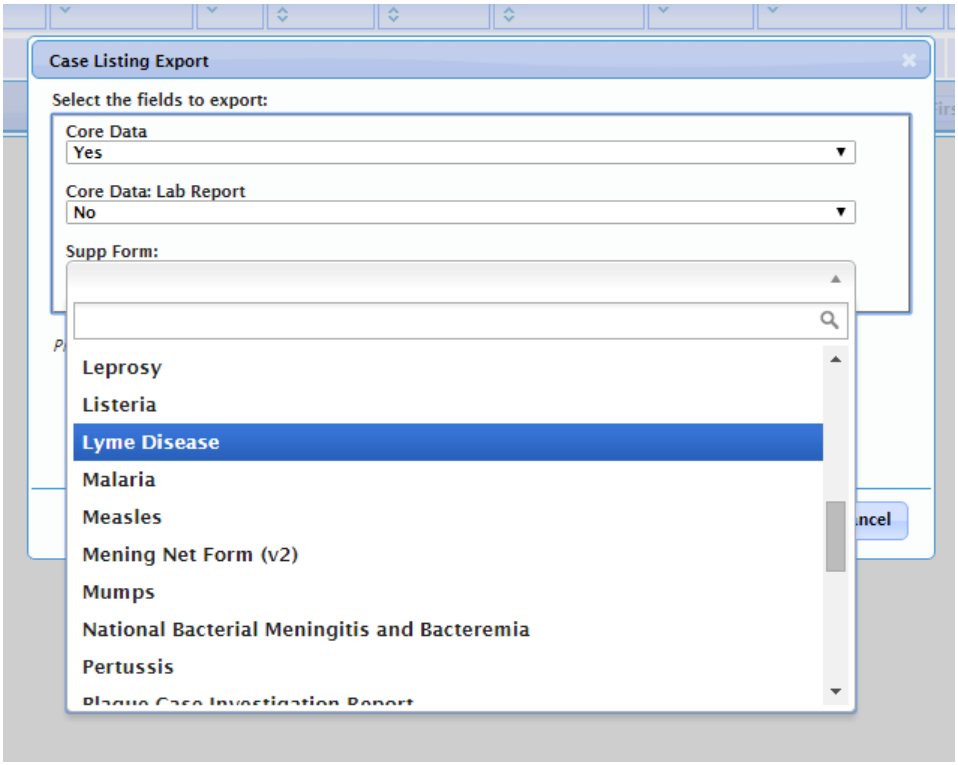


1.4 Export CDC Forms

From the Case listing, you can export CDC Form Data by clicking Export:

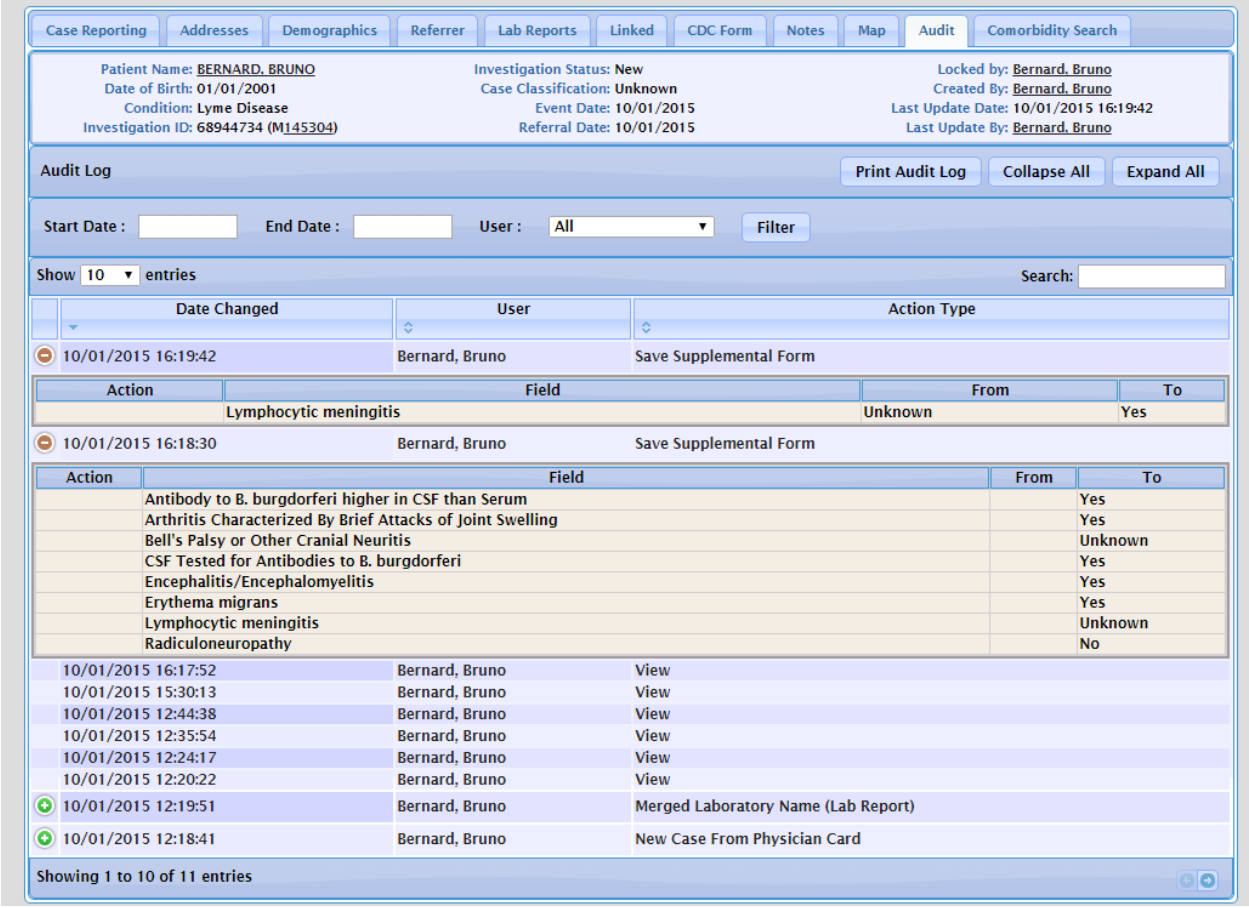


The following Dialog box will open and you can choose to export core data as well as the CDC Form Data:



1.5 Audit Trail when the CDC Form is edited.

Every time a user edits the Form, the audit trail will record the information that was edited:



2 New Custom Forms

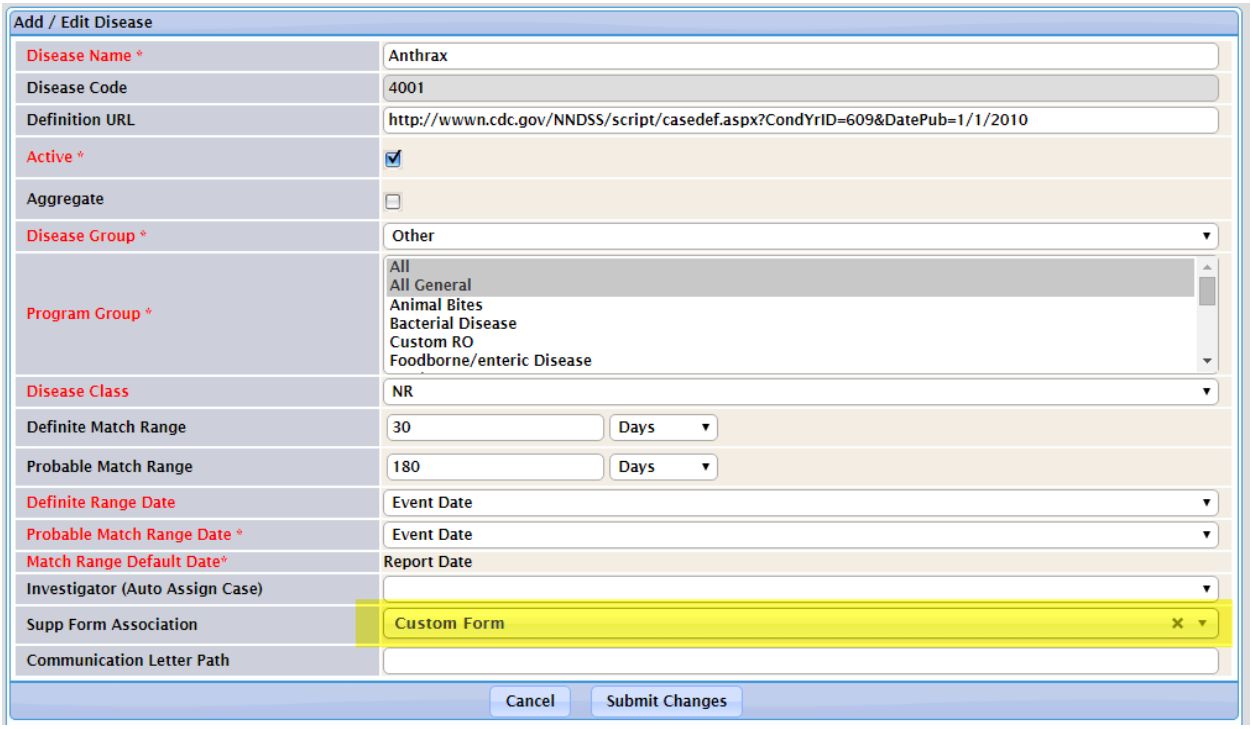
To accommodate special public health situations that may involve investigations into a disease outbreak or harmful environmental exposures, there was a need to have the ability to create a customized form that can assist in these investigations. Sentinel now allows the User to define their own forms. The same functionality as described for the CDC forms above applies to these custom forms. This includes:

- Ability to View/Edit a Custom Form
- Ability to Print a Custom Form
- Ability to Search for any questions from the Custom Form
- Ability to Export all the questions from the Custom Form
- Ability to keep track of all the changes made to the Custom Form

In addition, you will be able to:

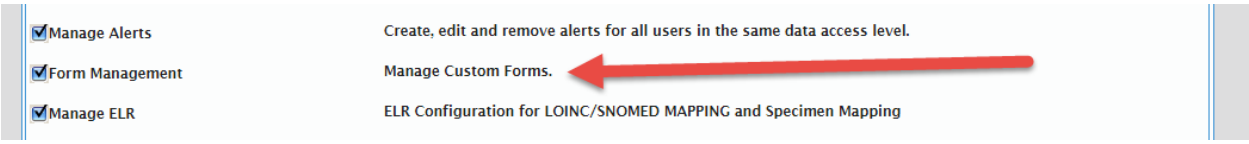
- Define the name of the Tab to access the Form from the patient's case.

Once a Form is created, you can associate the Custom Form to a disease just like you would associate a CDC Form to a disease:

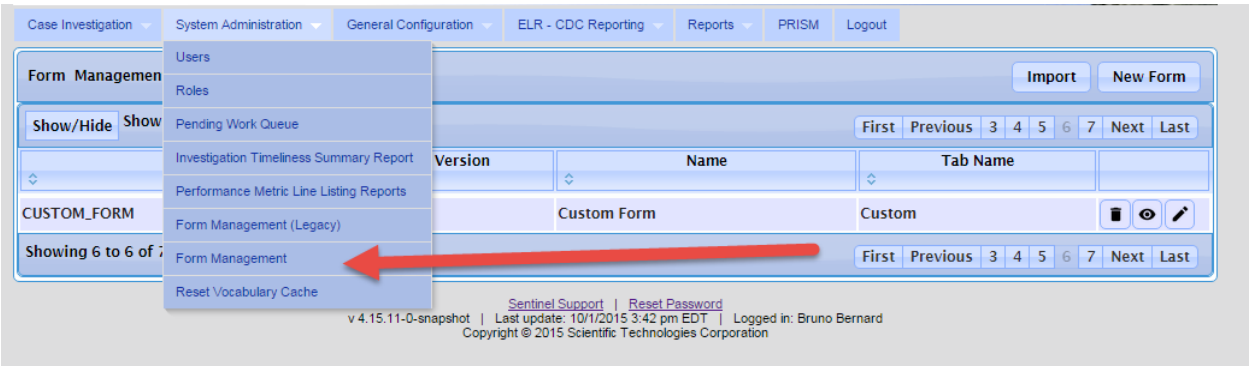


3 Creating and Defining a new Custom Form

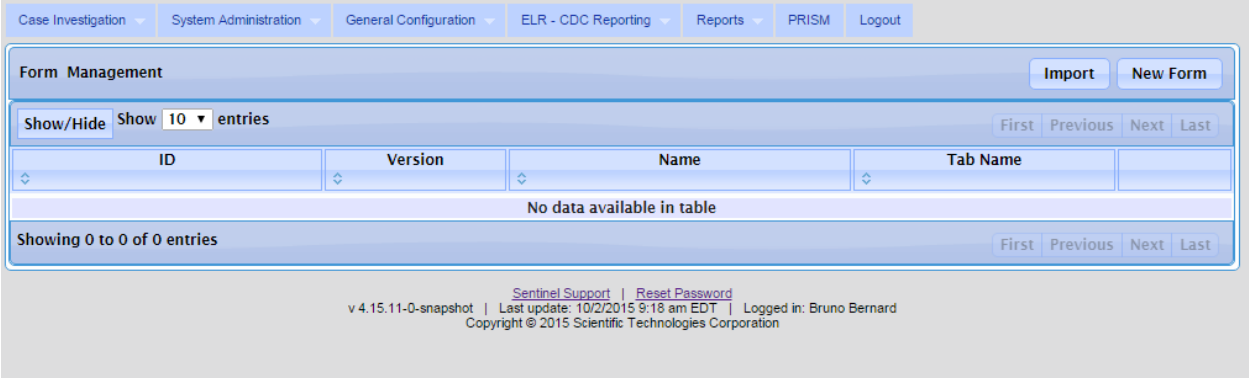
To access the Form Management Screen to Create a new Custom Form, you will need the Form Management Privilege. You can add the privilege by going to System Administrator/Roles and edit the role associated with your user:



Once you have the privilege activated, you will then be able to access Form Management from the System Administrator Menu:



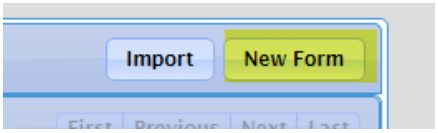
You will then be presented with a list of Custom Forms that are in the system (if any):



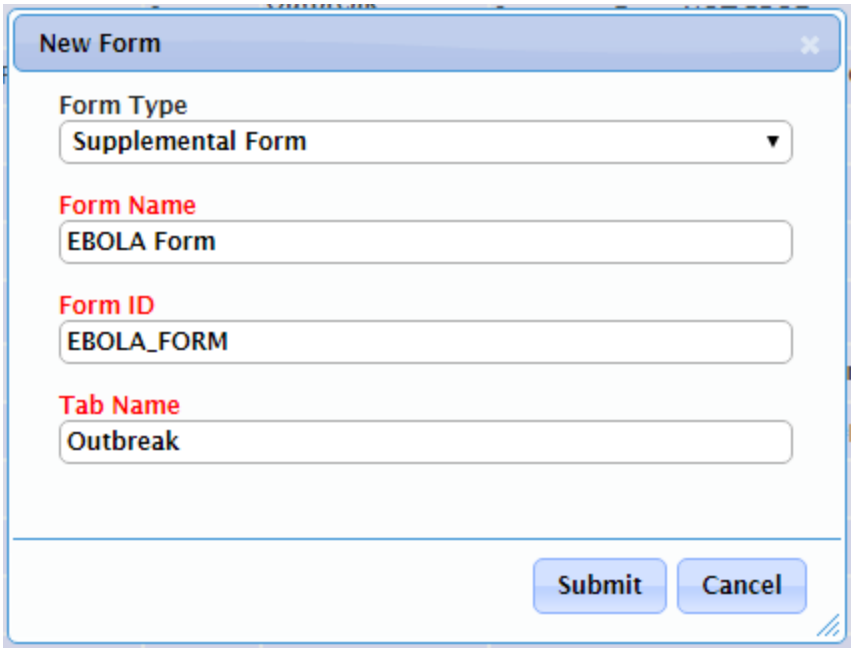
As a Reminder, you can still import a Java Form created by STC by clicking Import.

3.1 Create the Form

To create a new Form, simply click **New Form** on the Form Management Screen:



You will then be presented with the following Dialog box:



Definitions:

Form Type	Options are: ● **Supplemental Form**: Custom Supplemental Form to be associated with a Disease or an Outbreak. The form is available when viewing or editing a human disease case. ● **Outbreak Event Form**: Form to be associated with an outbreak. This form as an outbreak event data entry form. **(New in May 2016 Release)** ● **Outbreak Summary Form**: Form to be associated with an outbreak. There will only be one instance of the form filled per outbreak and can be filled within the outbreak management page. **(New in May 2016 Release)** Default: **Supplemental Form** Note: ● The **Outbreak Event Form** form definition requirement are the same as **Supplemental Form** except that the core fields option will be limited to: ○ Patient's First Name (Required to be present and marked are required) ○ Patient's Last Name (Required to be present and marked are required) ○ Patient's Middle Name ○ Patient's Date Of Birth ○ Patient's Sex ○ Patient's Race ○ Patient's Ethnicity ○ Patient's Home Phone ○ Patient's Work Phone ○ Investigation Address Street1, Street 2, State, City, Zip, County ● The **Outbreak Summary Form** form definition requirement are the same as **Supplemental Form** except that the core fields option will be limited to: ○ Outbreak Name ○ Outbreak Id
Form Name	Name of the Form that will display at the top of the Form in the patient's case and in the drop down when a Supplemental Form is selected under Disease Code Management and Search. The maximum number of characters is **200**. This is a required field.
Form ID	Unique identifier for the form (Uppercase and alphanumeric Name with no space). The maximum number of characters is 75. The Form ID has to be a unique ID across all the Forms. Note: If you skip this field and begin to enter the Form Name, the system will automatically create the ID for you. This is a required field.
Tab Name	Define the name of the Form on the Form Tab. It is recommended to keep the name as short as possible. The maximum number of characters is **40**. This is a required field.

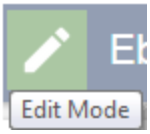
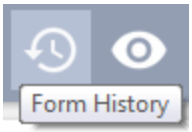
When you have finished entering the required information in the fields, click **Submit.** You will be directed to the **Form Builder** where you will be able to create your form:

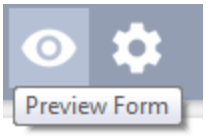
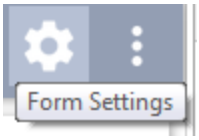
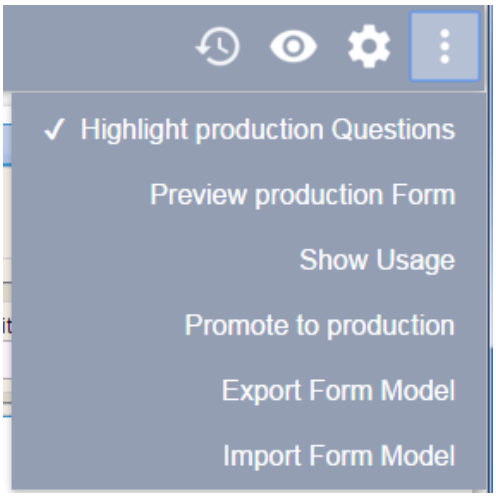
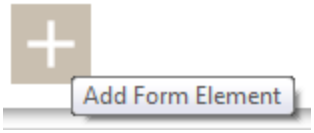
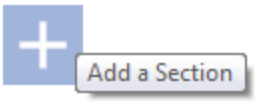
4 Form Builder

4.1 Navigation through Icons

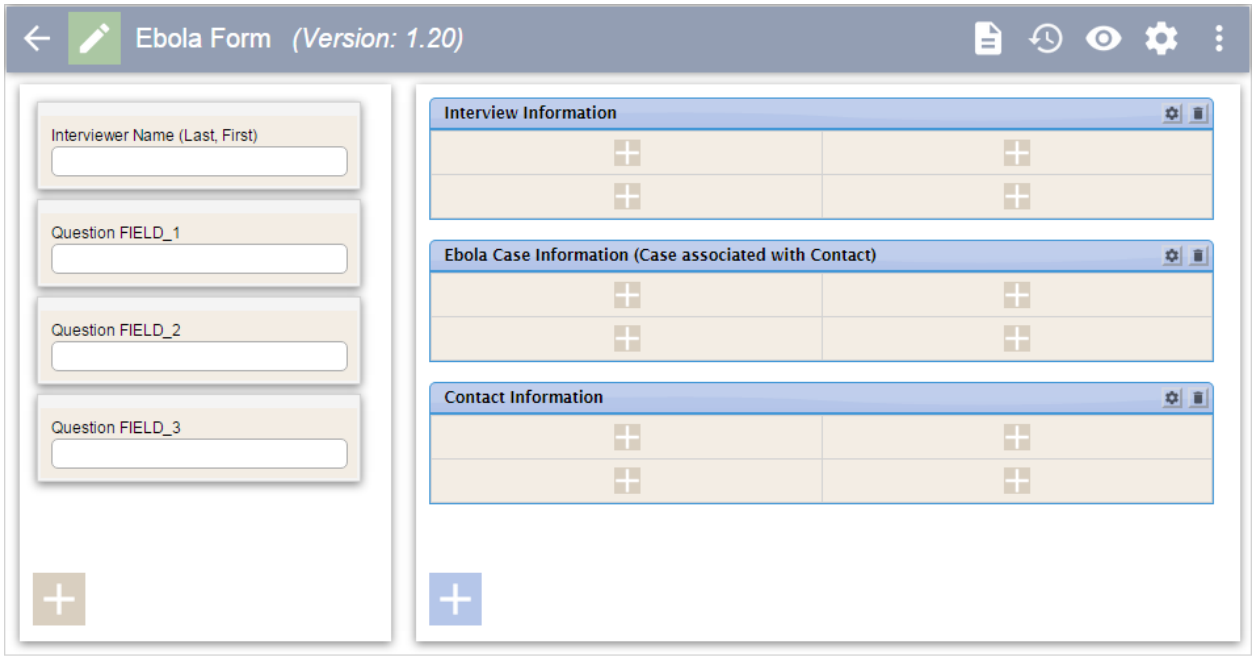
To improve the user experience in Sentinel, icons will be used to create the Custom form in place of text to modernize the look and feel of the system and keep the screen less busy. If you hover your mouse over the button, a tooltip will appear to inform you of the button's function.

Button definitions: What do they all mean?

<table>
<tr><td>
</td><td>If you click on the left Arrow, it will take you back to the Form Management List Screen.</td></tr>
<tr><td> 
</td><td>The icon next to the arrow is not a button but an indicator to let you know which mode you are in.
Possible values are:
<table><tr><td> </td><td>The Form is in Edit Mode. You can make changes.</td></tr><tr><td> </td><td>The Form is in Read Only Mode (It is either disabled or currently locked for edit by another user). The reason will appear underneath.</td></tr><tr><td> </td><td>The Form is currently under maintenance and Pending to go in Production (See Versioning/Promote to Production Section).</td></tr></table></td></tr>
<tr><td>
</td><td>The Form Name and the Version. The version consists of 2 numbers separated by a dot. The first number is the Major Version (See Versioning/Promote to Production Section). The second number is the minor version (Every time you make a change, this number will increment).</td></tr>
<tr><td> 
</td><td>Every time you make a modification to the Form, it is saved automatically (this is why there are no Save button). You can click on Form History to display all changes since it was last Promoted to Production (See Form History Section or Reverting Changes Section).</td></tr>
</table>

	Even if the Form look and feel is similar to the Form Builder, you can click on **Preview Form** to view the form the way it would actually look like when a data entry user uses this Form.
	At any time, you can edit the Form Name, Tab Name, Tab Name (Short) or disable the Form (See Disabling or Deleted Form).
	The last icon to the right is the Action Menu. It offers more options, which include: • "**Highlight production Questions**" will highlight the Questions that are already in production (See Editing a Form that was Promoted to Production). • "**Preview production Form**" will show the form the way it currently looks for data entry user. • "**Show Usage**" will display the users that are currently performing data entry on this Form. It will also list the diseases/outbreak associated with this form. • "**Promote to Production**" will be used when you are done with the design of the Form and you want to make it available to the data entry user (See Versioning/Promote to Production Section). • "**Export Form Model**" will be used when you want to export the form you created in another system (or another form) (See Exporting/Important Form Model Section). **(New in May 2016 Release)** • "**Import Form Model**" will be used when you want to import a form model previously exported.(See Exporting/Important Form Model Section). **(New in May 2016 Release)**
	Click this button to add a new Form Element (See Adding Sections and Form Elements Section). Note: The beige color is the same as the same color background for "Questions" in Sentinel.
	Click this button to add a new Section (See Adding Sections and Form Elements Section). Note: The blue color is the same as the color of the Section Headers in Sentinel.

4.2 Page Layout



There are 2 panels:

- The panel on the left is a temporary place holder for Form Element of Type Question. Any question that is left here will not be visible to the data entry user.
- The panel on the right is the actual form layout.

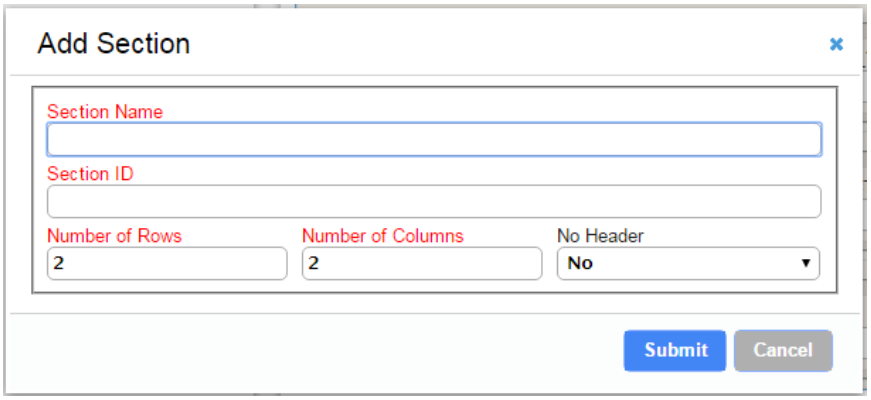
The remaining sections of this document will explain how to perform the following functions:

- Add a Form Element of Type Question to the left Panel
- Add a section to the right Panel
- Add a Form Element to the right Panel
- Organize Form Elements
- Delete Form Elements
- Reorganize sections
- …

5 Adding Sections

5.1 Adding Sections

To add a new section, click on the blue icon . The following Dialog box will appear:

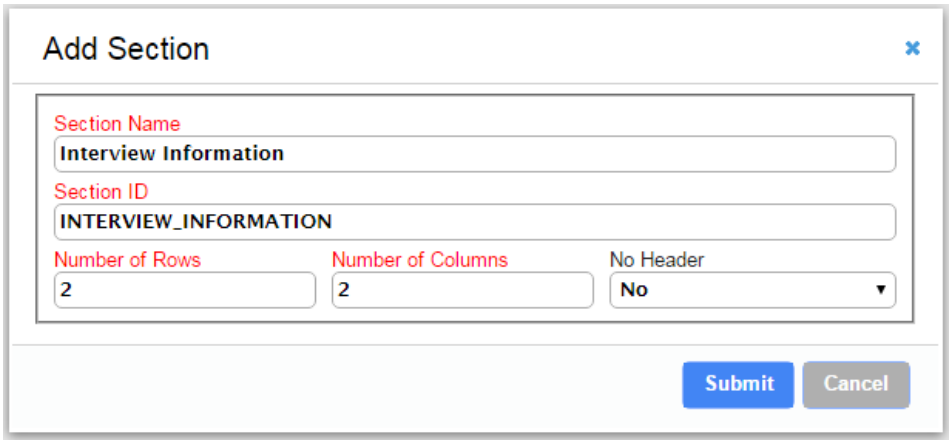


Definitions:

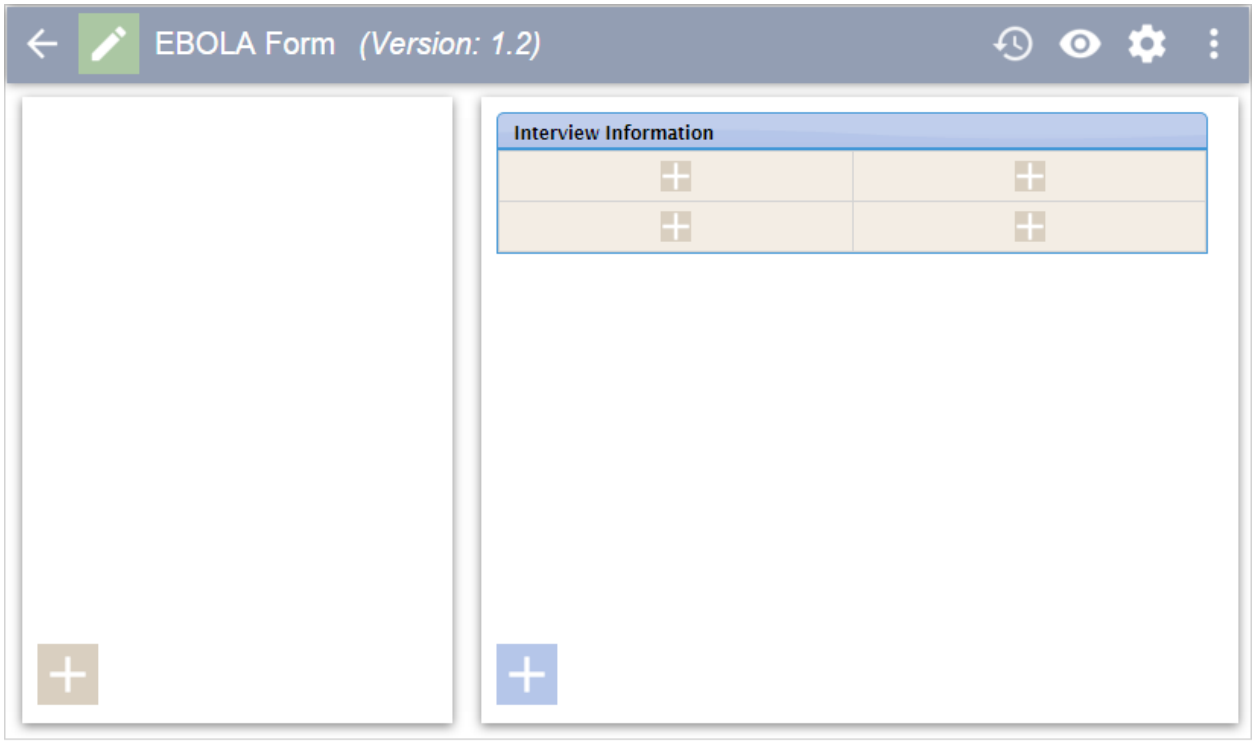
Section Name	Name of the Section that will display at the top of the Section. The maximum number of characters is **120**. This is a required field.
Section ID	Unique identifier for the Section (Uppercase and alphanumeric Name with no space). The maximum number of characters is 75. The **Section ID** has to be a unique ID within the Form. Note: If you skip this field and begin to enter the Section Name, the system will automatically create the ID for you.This is a required field.
Number of Rows	When creating a section, the form builder will display a virtual table where you can add Form Elements. **Number of Rows** define the number of rows you would like this table to have. You can change the number at any time. This is a required field.
Number of Columns	When creating a section, the form builder will display a virtual table where you can add Form Elements. **Number of Columns** define the number of columns you would like this table to have. You can change the number at any time. This is a required field.
No Header **(New in Feb 2016 Release)**	If you want to add sections on a form with no header and title, set No Header to **Yes.**

Example:

Click the blue icon . The following Dialog box will appear:

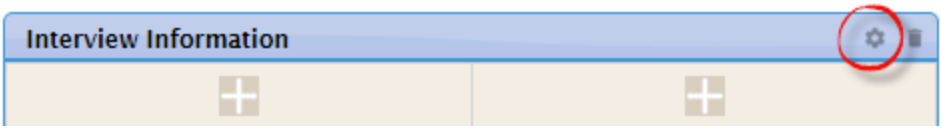


Complete the required information and click Submit. The section is now added to the right panel and ready to be used:



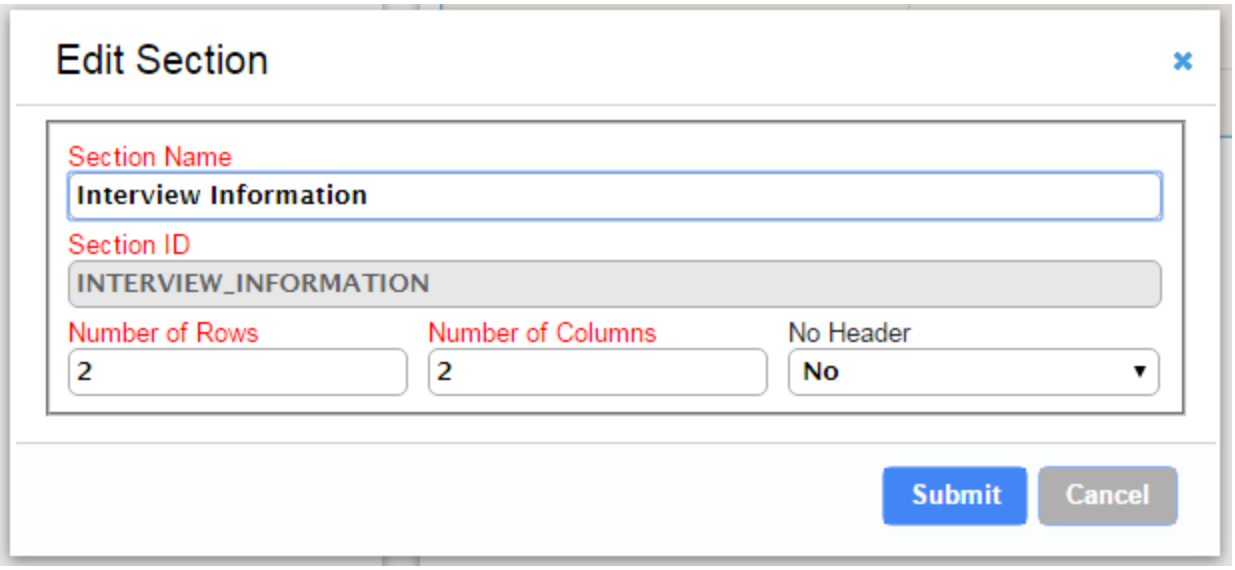
5.2 Editing a Section Name

To edit a section, click the following icon in the blue Section header you want to edit:



Note: You can also double click on the blue section.

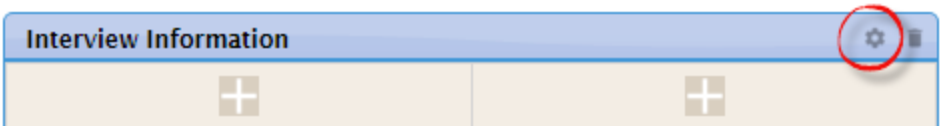
The following Dialog box will appear:



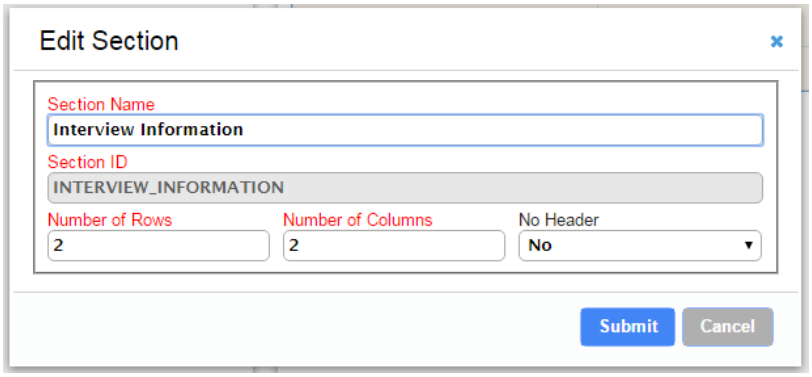
Update the the Section Name with your edits and click Submit. The section on the right Panel will then be updated.

5.3 Resizing a Section/Table/Fieldset

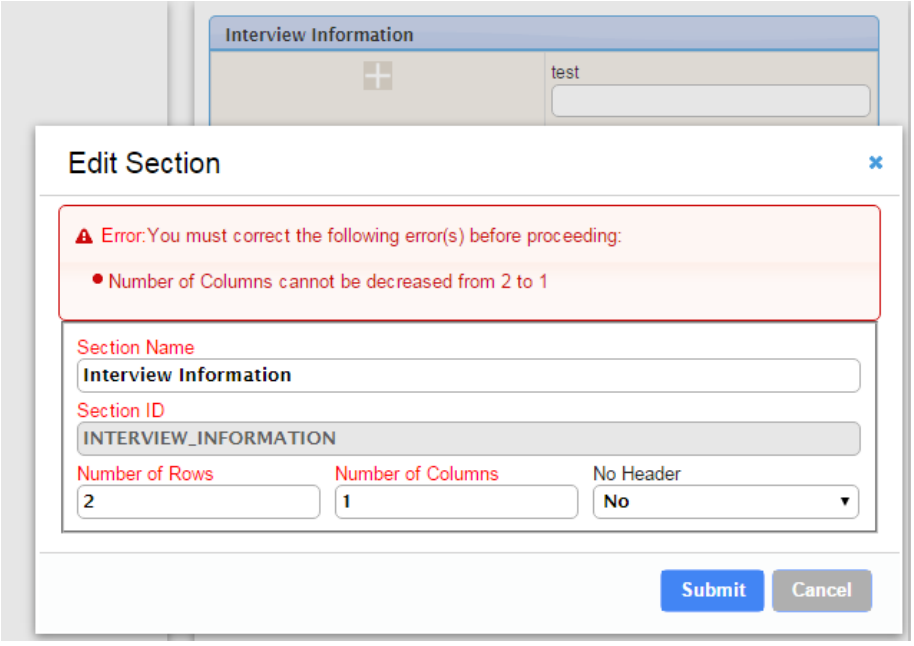
To resize a section, click the following icon on the blue Section header you want to resize:



The following Dialog will appear:



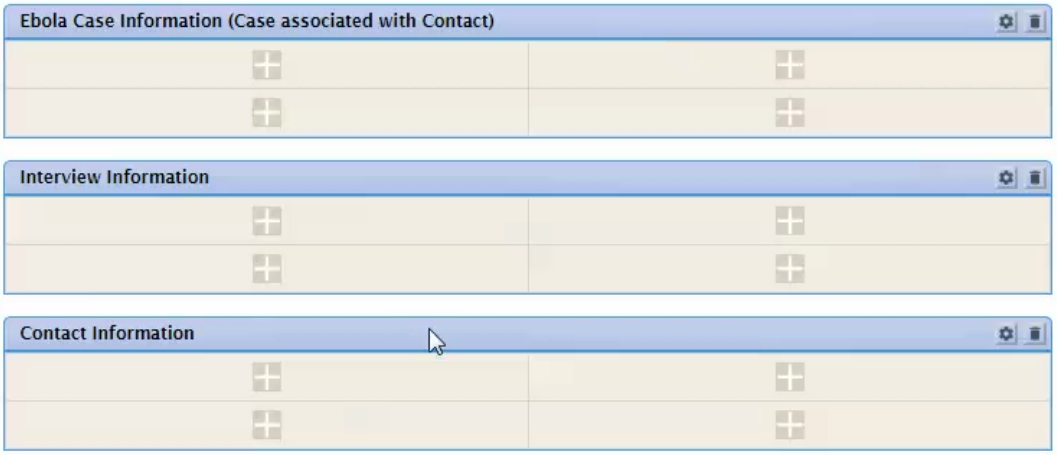
You can increase and/or decrease the number of rows or columns. Note that if the number of rows (or columns) cannot be decreased, an error will appear to let you know that the number cannot be decreased due to questions that are in the cells that comprise of the row and column you wish to remove:



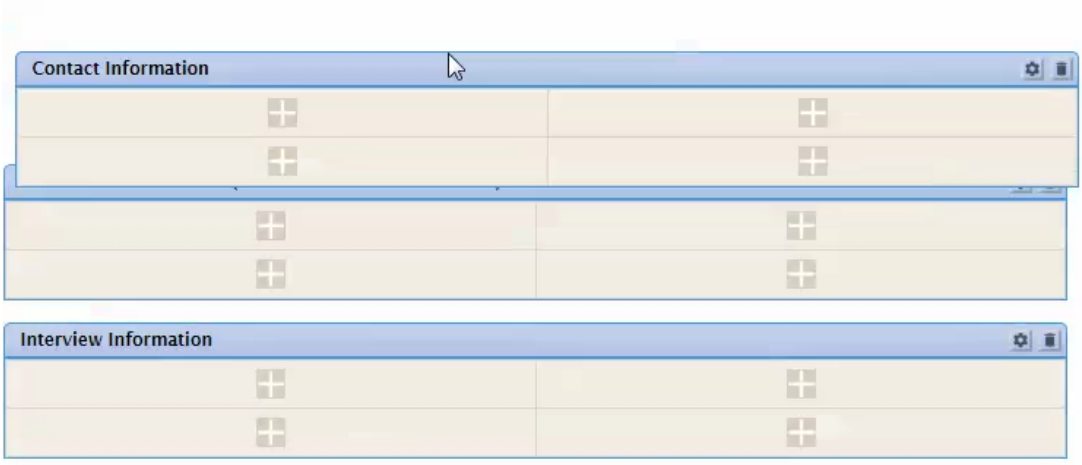
Note: The same functionality applies to Fieldsets and tables.

5.4 Reorganizing a Section (Drag and Drop)

Click on the blue header of the section you want to move:



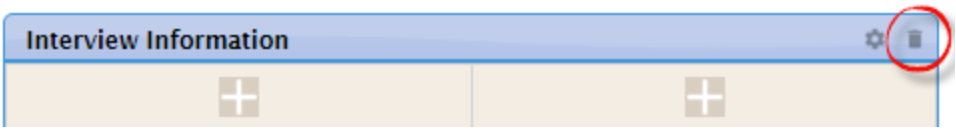
While keeping your Left mouse button pressed, move the cursor to where you would like the section to be moved to:



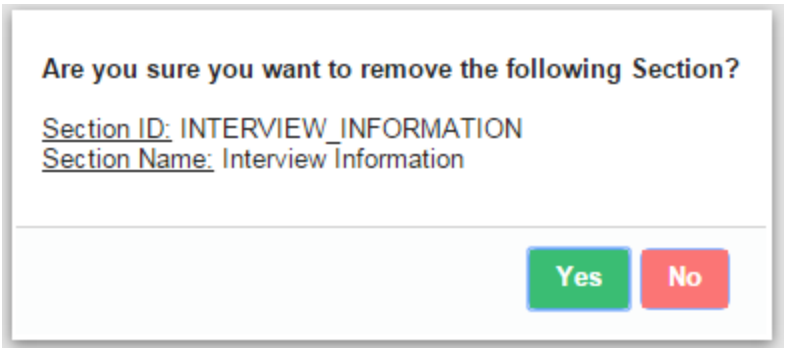
To see a video demonstration, click on this link.

5.5 Deleting a Section

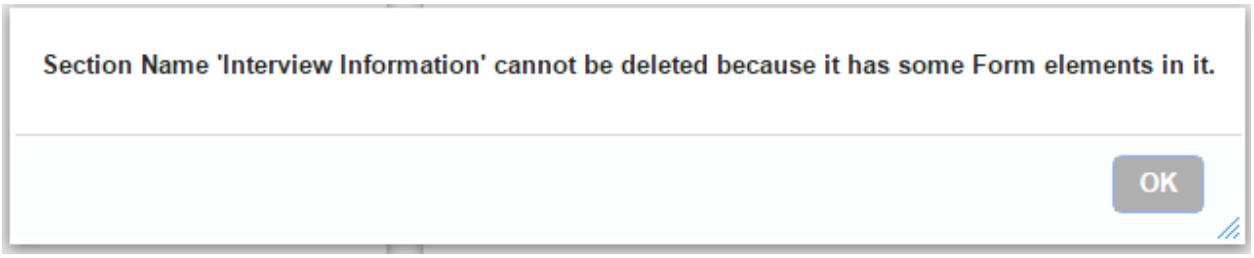
To delete a section, click the following icon on the blue Section header you want to delete:



If the Section can be deleted, you will be then be prompted for a confirmation:



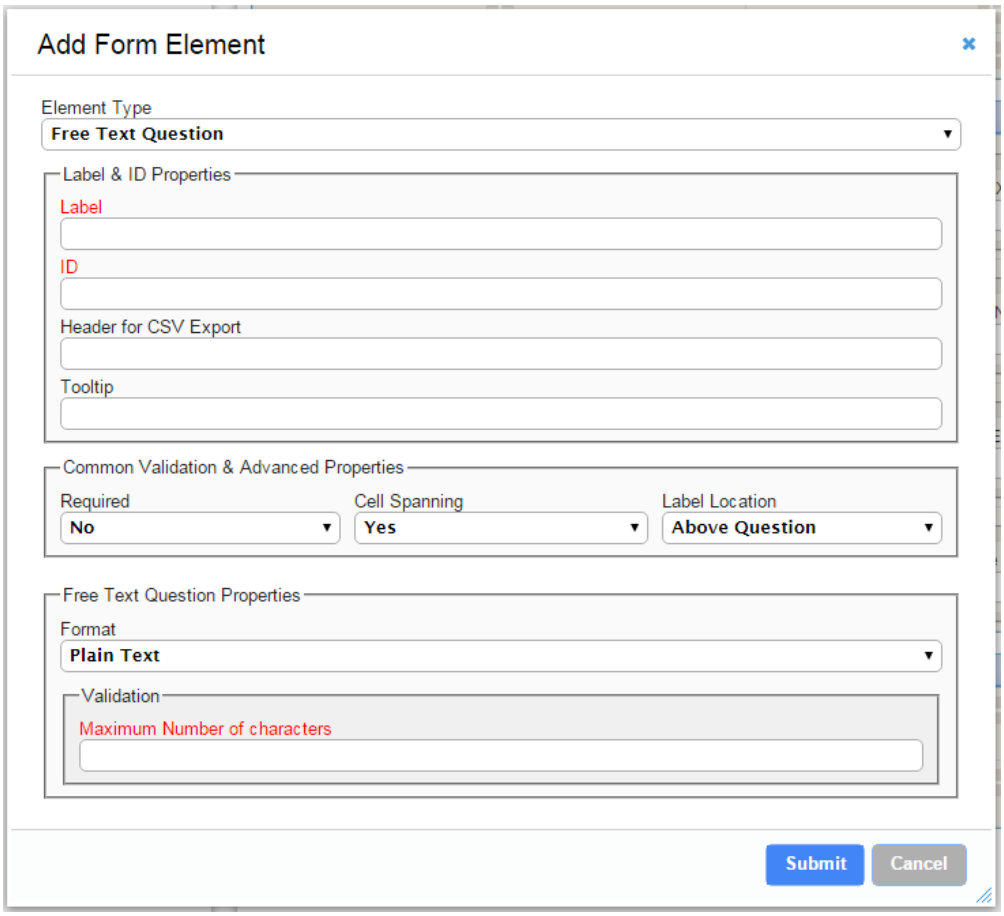
If the section cannot be deleted due to Form Elements present in the section, the following window will appear instead:



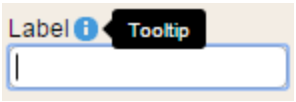
6 Adding Form Elements

6.1 Adding a Form Element

To add a new Form Element, click on the beige icon at the bottom left of the page. The following Dialog box will appear:



Definitions:

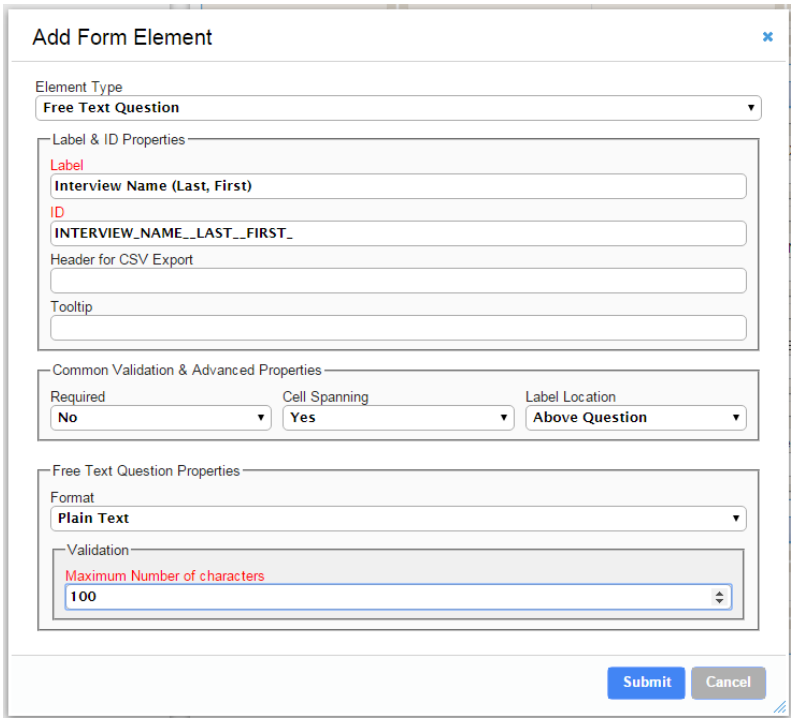
Element Type	You have the following options based on the type of Form Element you wish to add: • Free Text Question • Dropdown Question • Multi Select Question • Check Box Question • Core Data Question • Fieldset (Option available on the right panel only) • Table (Option available on the right panel only) • Label • Read Only Text For more details, see the **Type of Form Element Supported** Section.
Label	Name of the Form Element that will display. The maximum number of characters is **200**. For most of the Form Element the location is above the Element and can be changed using the Label Location Option. This is a required field when applicable (Label does not apply for all the Form Element Types).
ID	Unique identifier for the Form Element (Uppercase and alphanumeric name with no space). The maximum number of characters is 75. The **ID** has to be a unique ID within the Form. Note: If you skip this field and begin to enter the Label, the system will automatically create the ID for you. This is a required field when applicable (ID does not apply for all the Form Element Types).
Header for CSV Export	By default, the Label is used for the CSV export. If you want the Header in the CSV Export to be different, you can enter a different one here. The maximum number of characters is **200**. Note: Header for CSV Export does not apply for all the Form Element Types.
Tooltip	Enter text for a tooltip if you wish to have a tooltip to be displayed as part of the Label with a blue icon like this:  The maximum number of characters is **200**. Note: Tooltip does not apply for all the Form Element Types.
Required **(New in Feb 2016 Release)**	This is only applicable to Form Elements of Type Question. • Set to **Yes** if you want the question to be required when entering data on this form.

	• Set to **No** if you want the question not to be required when entering data on this form. Default **No** <u>Does not apply to:</u> • Checkboxes Questions Form Element • Core Data Questions Form Element • Fieldset Form Element • Table Form Element • Label Form Element
Cell Spanning	• Set to **No** if you want the Form Element to remain always within the Table Cell. • Set to **Yes** if you want the form Element to extend itself within all the following empty Table Cells until it reaches the end of the row or a cell with a Form Element. Default is Yes.
Label Location **(New in Feb 2016 Release)**	This is only applicable to Form Element of Type Question. • Set to **Above Question** when you want the label to appear above the question. • Set to **Above Question With Fieldset** when you want the label to appear within a Fieldset surrounding the question. • Set to **Hidden** if you do not want the label to appear (mostly used when doing table data entry). • Set to **Right next to Checkbox** when you want the label to appear next to the checkbox (Only application to checkboxes). Default is **Above Question**. <u>Does not apply to:</u> • Fieldset Form Element • Table Form Element • Label Form Element
Type Specific Configuration	Based on the Form Element Type, you will be prompted with different parameters to define (see **Type of Form Element Supported**).

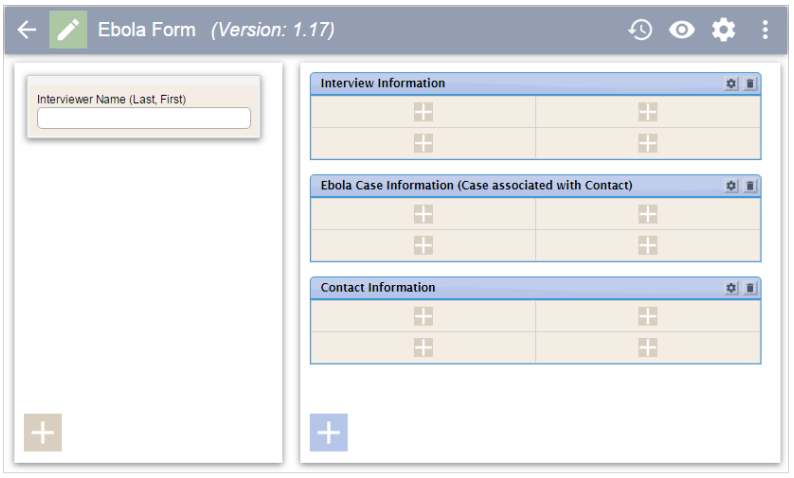
Once you enter all the appropriate information, the Form Element will appear in the left panel (only Form Element of Type Question can be added to the left Panel).
<u>As another alternative in adding a Form Element,</u> you can click on the beige icon within each section in the right panel. This will add the Form Element directly in that section.

Example:

We are going to add a Form Element of type **Free Text Question**, **Labeled Interviewer Name (Last, First),** with a maximum number of characters of 100. We will add this question by clicking the beige plus icon in the bottom left panel.



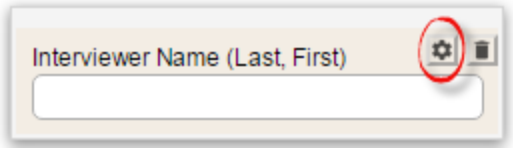
After entering this information, click **Submit**.



The Form Element of type Question has now been added to the left panel. If you were to click on a beige plus icon within a section, the Form Element would have been added to that selected section. To move a Form Element to a section in the right panel, see Reorganizing a Section (Drag and Drop).

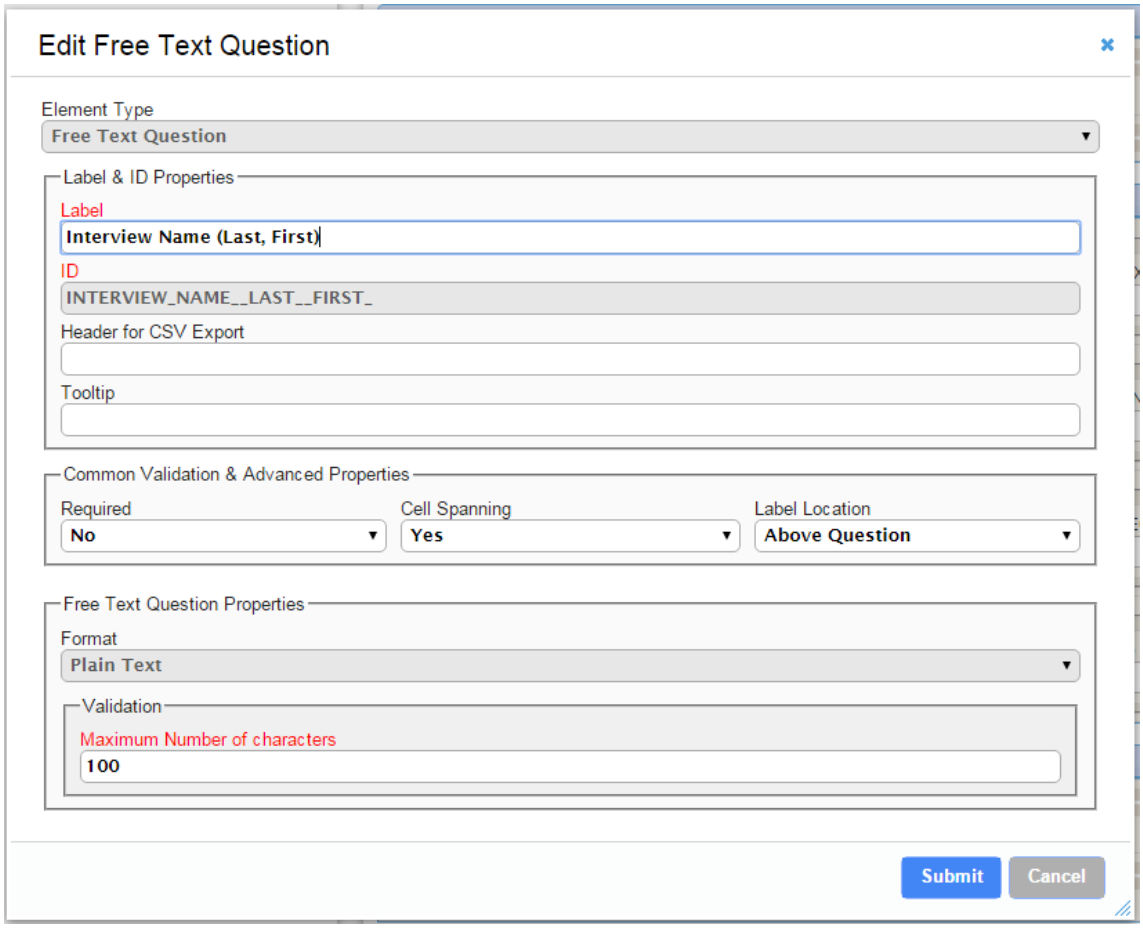
6.2 Editing a Form Element

To edit a Form Element, move your mouse over the Form Element. The following icon will appear. Click on the icon to edit the Form Element:



Note: You can also double click on the Form Element to make edits to it.

The following Dialog box will appear:



You will be able to modify parameters such as the Label, Header for CSV Export, Tooltip, Required, Cell Spanning, and Label Location. You will not be able to change the Element Type. Click Submit when you are finished editing.

6.3 Reorganize Form Element (Drag and Drop)

There are 4 ways to move Form Elements as you create a Custom Form:

- Within the Left Panel
- From the Left Panel to the Right Panel
- Within the Right Panel
- From the Right Panel to the Left Panel

It is important to note that Only Form Element of type Questions can be in the left Panel.

6.3.1 Moving Form Elements of Type Question within the Left Panel

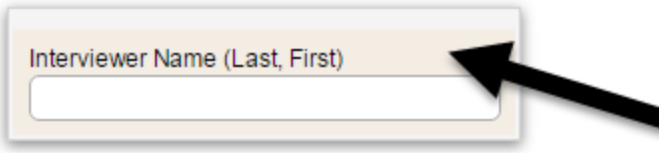
The Left Panel is a temporary place for Form Elements of Type Question while working on the form layout. It is also a place for questions you no longer want to include in the form. For example, if the question was part of the form when it was in Production and the question no longer needs to be part of the form, you can move it to the left panel and it will no longer appear in the form. This will ensure that any information entered for this question at the time it was in Production will be retained. For more information, see Editing/Deleting Question after Promotion to Production section.

To re-organize questions in the left panel, click and drag on the small gray section above the question and move the question up and down:

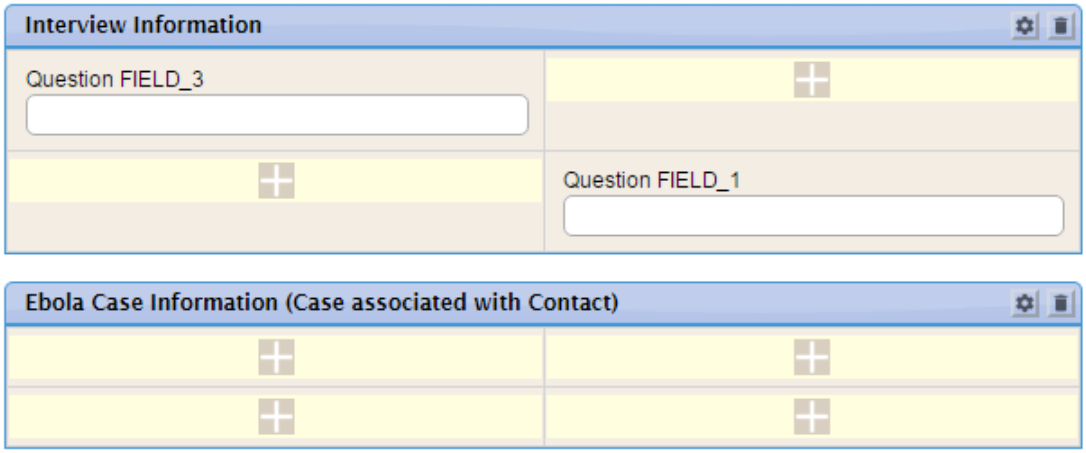
To see a video demonstration, click on this link.

6.3.2 Moving Form Elements of Type Question from the Left Panel to the Right Panel

If you want to include a Form Element of Type Question from the Left Panel to a specific table cell of a Section in the Right Panel, drag and drop the question using the beige background and not the gray bar:



While you are dragging the question, the possible drop locations in the sections will be highlighted in yellow:



To see a video demonstration, click on this link.

6.3.3 Moving Form Elements within the Right Panel

You can move Form Element within the Right Panel by dragging and dropping the Form Element into any empty table cell of a Section (applies to Table Cell of Fieldset and Table as well). If you drop the Form Element on another Form Element, the Form Builder will swap the Form Elements.

To see a video demonstration, click on this link.

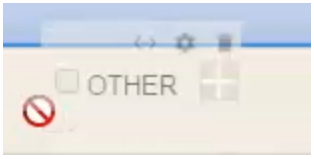
6.3.4 Moving Form Elements of Type question from the Right Panel to the Left Panel

To move a Form Element of Type Question from the Right Panel to the Left Panel, drag and drop the Form Element at the bottom of the Left Panel with the gray plus sign. The drop area will be highlighted in yellow as you drag the Form Element to the Left Panel.

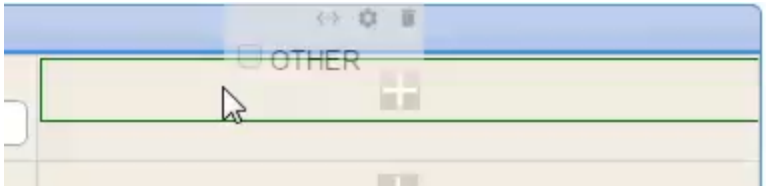
To see a video demonstration, click on this link.

6.3.5 Visual Indicator while dragging **(New in Feb 2016 Release)**

While Dragging, a red visual indicator will tell you when the Form Element cannot be dropped when you drag the Form Element across the Form:



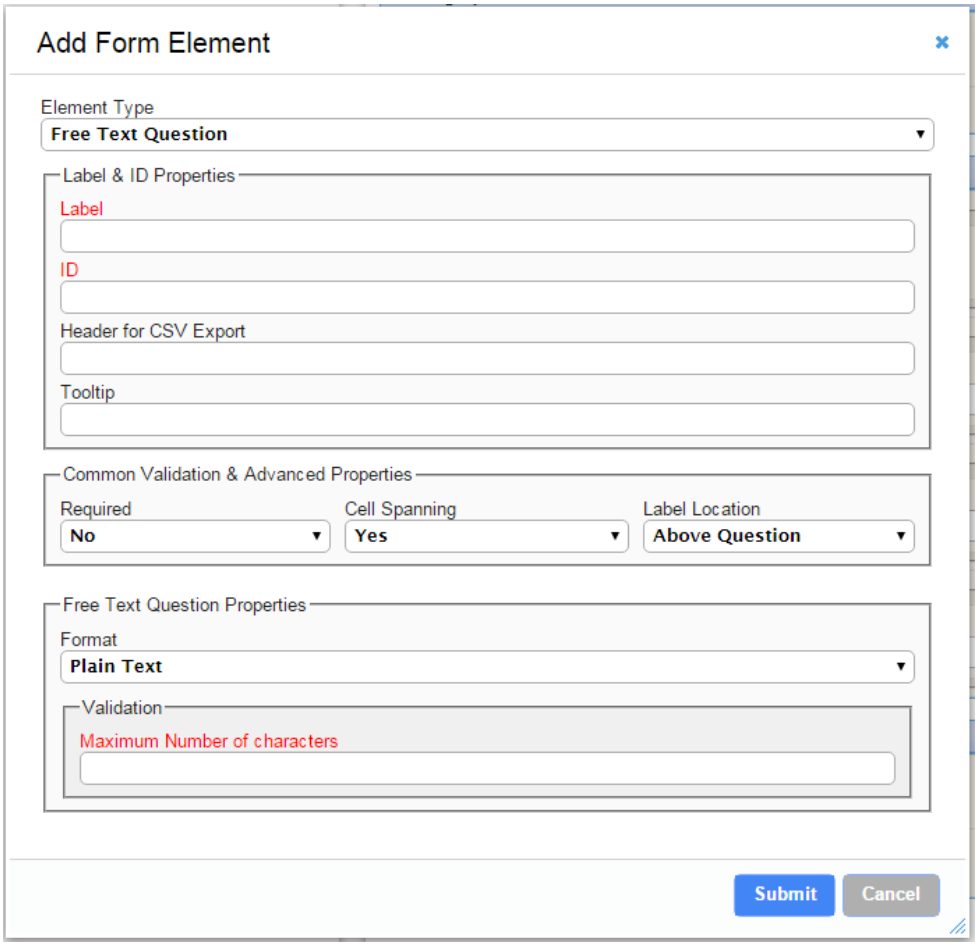
When the Form Element can be dropped, the normal arrow will appear along with green borders on the target element:



6.4 Types of Form Element Supported

6.4.1 Free Text Question

A Free Text Question allows the user to answer the question using alphanumeric characters:



Select the format for the Free Text Question. Available options are:

- Plain Text
- Plain Text (Multi-Lines)
- Date
- Number (New in Feb 2016 Release)
- Number with Decimal Point (New in Feb 2016 Release)
- Phone
- Time Military (New in Feb 2016 Release)
- Email (New in Feb 2016 Release)
- Zip Code (New in Feb 2016 Release)

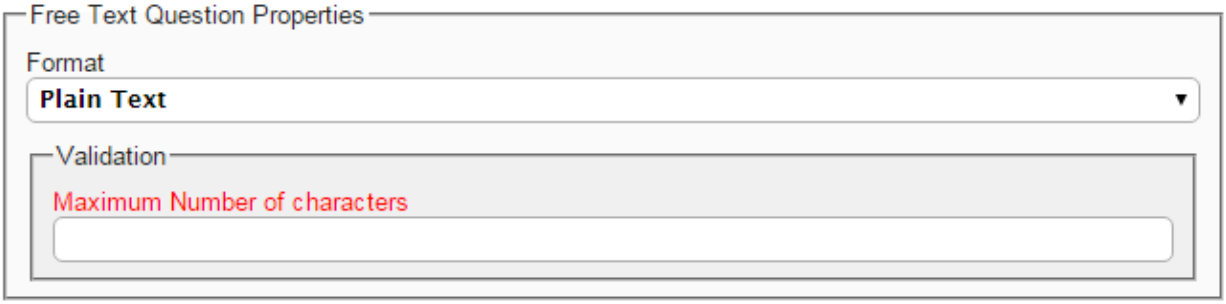
The default selection is **Plain Text**.

6.4.1.1 Free Text Question (Format: Plain Text)

When you select **Plain Text** as the Format, the following configuration will appear:

- Maximum Number of characters (Required). The valid range is from 1 to **2000** characters.

Screenshot of Plain Text Question Properties:



Note: When promoted to production, you will no longer be able to:

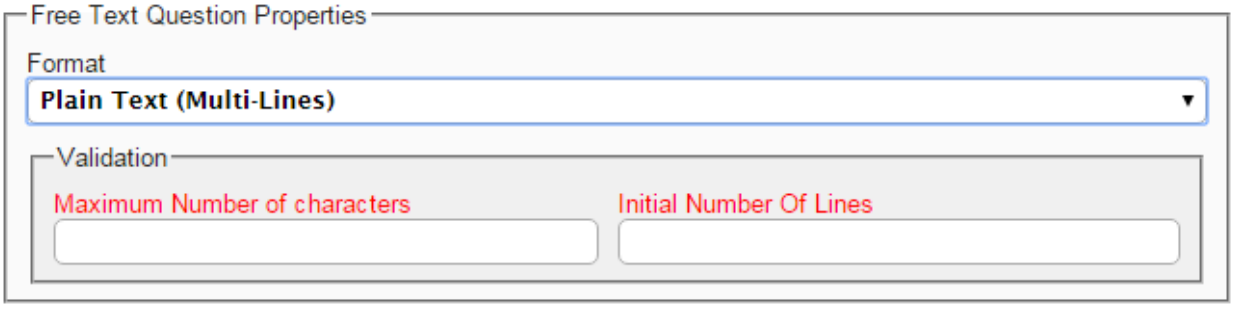
- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.2 Free Text Question (Format: Plain Text Multi-Lines)

When you select **Plain Text (Multi-Lines)** as the Format, the following configuration will appear:

- Maximum Number of characters (Required). The valid range is from 1 to **2000** characters.
- Initial Number Of Lines (Required). The valid range is from 1 to 30.

Screenshot of Plain Text (Multi-Lines) Question Properties:



Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.3 Free Text Question (Format: Date) **(New in Feb 2016 Release)**

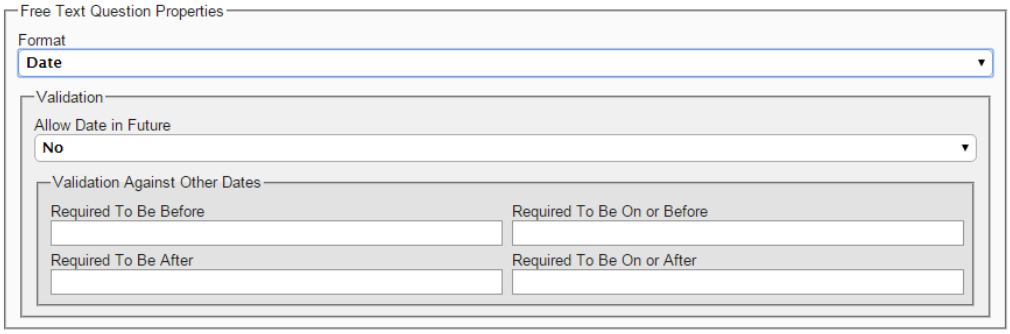
When you select **Date** as the Format, the following configuration will appear:

- Allow Date in Future: Set to **Yes** if do want to allow the data question to be in the future. Default is **No**.
- Validation Against Other Dates:
    - Required To Be Before: Multiselection of other questions (within the form) you want your question to be strictly before.
    - Required To Be After: Multiselection of other questions (within the form) you want your question to be strictly after.
    - Required To Be On or Before: Multiselection of other questions (within the form) you want your question to be on or before.
    - Required To Be On or After: Multiselection of other questions (within the form) you want your question to be on or after.

Note:

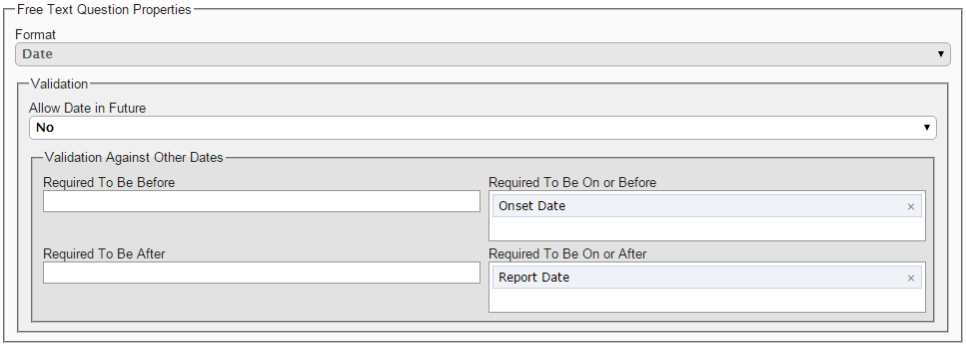
- A date question can only be part of a validation only if it is in the Form Layout.

Screenshot of Date Question Properties:



Note: When promoted to production, you will no longer be able to **Change the Format.**
Important: The system will not validate the consistency of the dates validation across all the other date questions. If not configured properly, data validation errors will appear no matter how the data entry form is filled.

Example of Date validation for a diagnosis date question:



6.4.1.4 Free Text Question (Format: Month/Year) (New in August 2016 Release)

When you select **Month/Year** as the Format, there will be no other configuration to add.

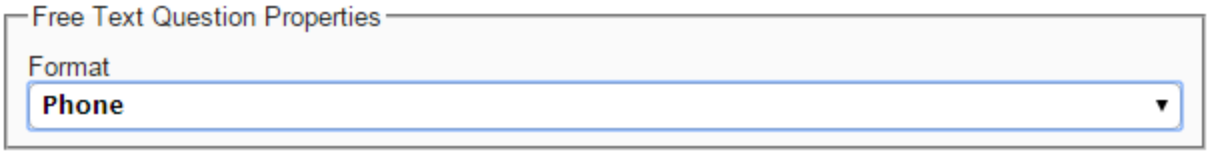
Screenshot of Month/Year Question Properties:

Note: When promoted to production, you will no longer be able to **Change the Format.**

6.4.1.5 Free Text Question (Format: Phone)

When you select **Phone** as the Format, there will be no other configuration to add.

Screenshot of Phone Question Properties:



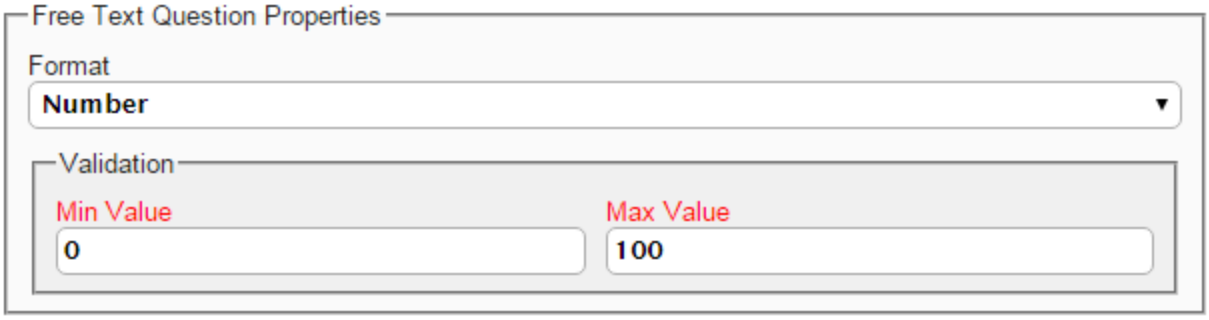
Note: When promoted to production, you will no longer be able to **Change the Format.**

6.4.1.6 Free Text Question (Format: Number) (New in Feb 2016 Release)

When you select **Number** as the Format, the following configuration will appear:

- Min Value: Minimum Allowed Value (number from 0 to 2147483647)
- Max Value: Maximum Allowed Value (number from 0 to 2147483647)

Screenshot of Number Question Properties:



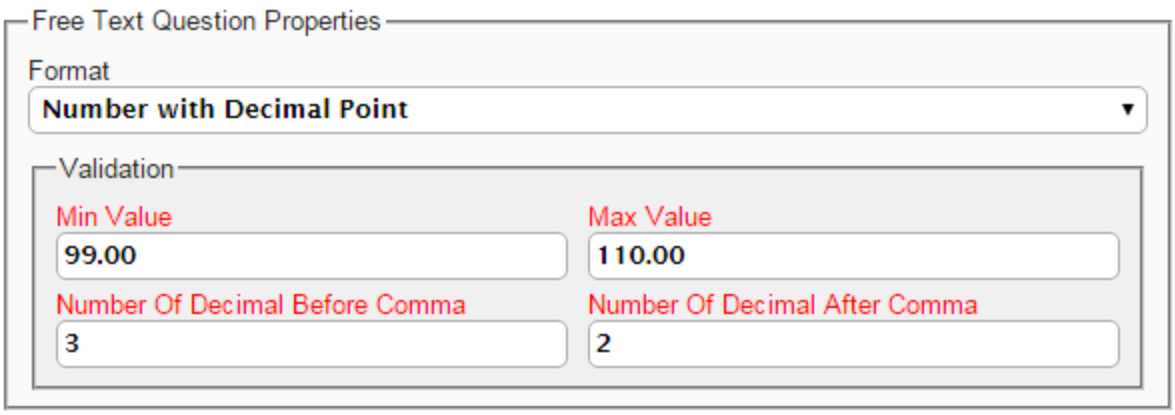
Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the range Min Value to Max Value

6.4.1.7 Free Text Question (Format: Number with Decimal Point) (New in Feb 2016 Release)

When you select **Number** as the Format, there will be no other configuration to add.

Screenshot of Number Question Properties:



Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the range Min Value to Max Value
- Decrease Number of Decimal Before Comma
- Decrease Number of Decimal After Comma

6.4.1.8 Free Text Question (Format: Time Military) (New in Feb 2016 Release)

When you select **Time Military** as the Format, there will be no other configuration to add.

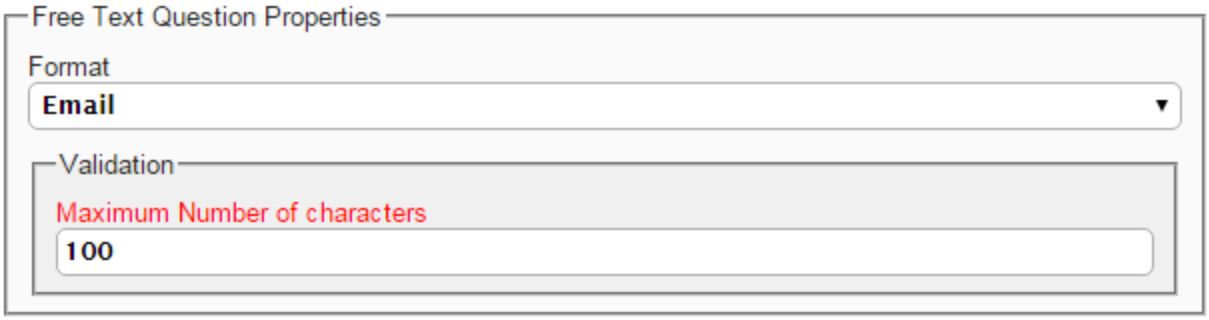
Screenshot of Time Military Question Properties:

Note: When promoted to production, you will no longer be able to **Change the Format.**

6.4.1.9 Free Text Question (Format: Email) (New in Feb 2016 Release)

When you select **Email** as the Format, there will be no other configuration to add.

Screenshot of Time Military Question Properties:



Note: When promoted to production, you will no longer be able to:

- Change the Format
- Decrease the value of the Maximum Number of characters

6.4.1.10 Free Text Question (Format: Zip Code) (New in Feb 2016 Release)

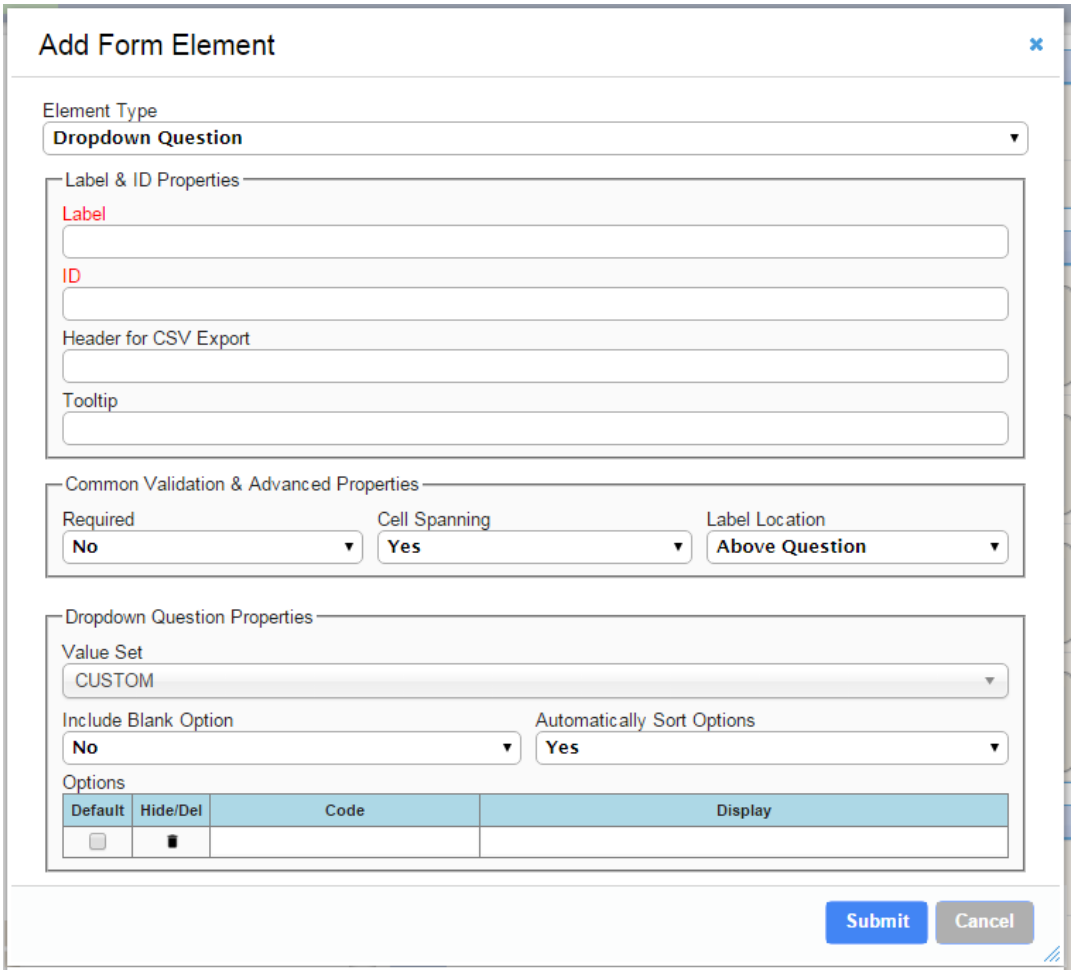
When you select **Zip Code** as the Format, there will be no other configuration to add.

Screenshot of Time Military Question Properties:

Note: When promoted to production, you will no longer be able to **Change the Format.**

6.4.2 Dropdown Question

You will be able to define a dropdown menu with your own options or use a predefined value set.



Definitions:

Value Set	Options: ● Custom: Define you own options ● All other options are predefined where selecting one of these options will pre-populate the value set with predefined selections. You will have the option to rename the Display, select the default value and hide some options. ● You can also select administrator configurable Code Set **(New in Feb 2016 Release):** ○ CODESET_CITY_DISPLAY_AS_CODE: all cities for the default state ○ CODESET_COUNTY: all counties for the default state ○ CODESET_FACILITY_ALL: all facilities (except manual facilities) ○ CODESET_INVESTIGATION_STATUS_ALL: all investigation status ○ CODESET_LPHU: all LPHU ○ CODE_OUTBREAK: all active outbreak ○ CODESET_REGION: all regions ○ CODESET_REPORTABLE_CONDITION_ALL: all active reportable condition.
Automatically Sort Options **(New in Feb 2016 Release)**	By default, options will be sorted. For custom options only, you can disable this. You can manually change the order by clicking on the up and down arrows at the end of every option:
Include Blank Option	Options: ● Yes: A blank value will be added as an option ● No: No Blank Value ● Yes (Default Value): A blank value will added as an option and will be the default value.
Options / Default	Check if you want the option to be the default value.
Options / Hide/ Del	<u>If Custom is selected in the Value Set:</u> ● If the question has not been promoted to production, you can delete the option by clicking the trash icon. ● If the question has been promoted to production, you can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed. <u>If a predefined Value is selected in the Value Set:</u> ● You can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed.
Options / Code	Database Code for the selection option (used in the database). To make the Database more efficient try to use a 1 to 3 characters code. Example: U for Unknown, Y for Yes This is disabled when Value Set is not Custom (or field is in production).
Option / Display	Option to display to the user. Maximum number of characters: 70

To enter more than one options:

- Under the Code column, enter the code
- Press Tab
- Enter the display
- Press Tab and a new line will appear.

There is no limit on the number of options.

You will also have the option to include a blank option by selecting **Yes** in **Include Blank Option.** If you want the blank option to be the default, select **Yes (Default Value).**

Note: When promoted to production, you will no longer be able to:

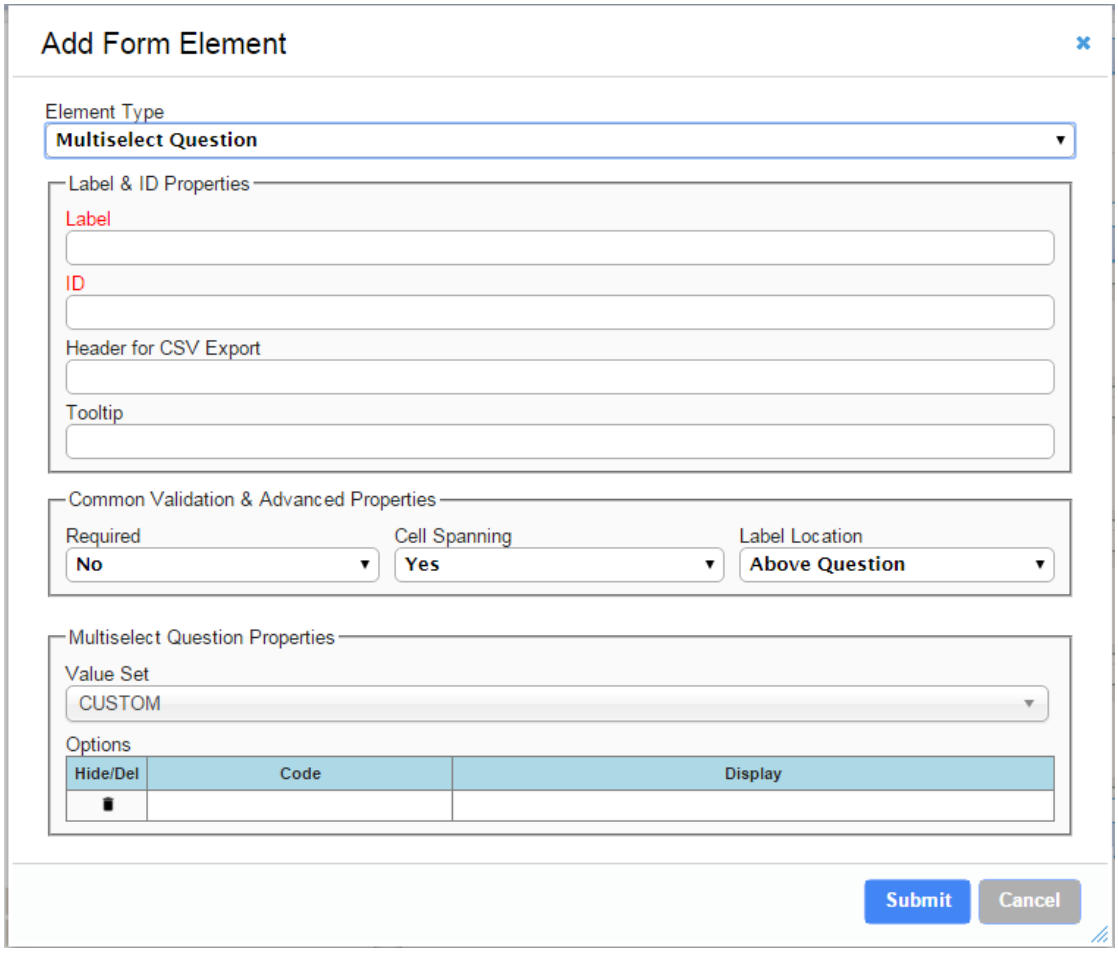
- Delete an option
- Change the Code

You will be able to:

- Hide the option (Will be hidden in forms where the option was not selected)
- Change the Display
- Change the default option

6.4.3 Multi Select Question

With a Multi Selection Question, you will be able to define a dropdown with your own custom options or using a predefined value set.



Definition:

Value Set	Options: ● Custom: Define you own options ● All other options are predefined where selecting one of these options will pre-populate the value set with predefined selections. Anything else: Use a predefined option. (In this case Options will be pre-populated (You will have the option to rename the Display, select chose the default value and hide some options.) ● You can also select administrator configurable Code Set **(New in Feb 2016 Release):** ○ CODESET_CITY_DISPLAY_AS_CODE: all cities for the default state ○ CODESET_COUNTY: all counties for the default state ○ CODESET_FACILITY_ALL: all facilities (except manual facilities) ○ CODESET_INVESTIGATION_STATUS_ALL: all investigation status ○ CODESET_LPHU: all LPHU ○ CODE_OUTBREAK: all active outbreak ○ CODESET_REGION: all regions ○ CODESET_REPORTABLE_CONDITION_ALL: all active reportable condition.
Options / Default	Check if you want the option to be the default value.
Options / Hide/ Del	<u>If Custom is selected in the Value Set:</u> ● If the question has not been in production, you can delete the option by clicking the trash icon. ● If the question has been promoted to production, you can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed. <u>If a predefined Value is selected in the Value Set:</u> ● You can hide the option by clicking the checkbox. If this answer was selected in a data entry form, it will remain as the selection. If a new data entry form is open, this option will not be displayed.
Options / Code	Database Code for the selection option (used in the database). To make the Database more efficient try to use a 1 to 3 characters code. Example: U for Unknown, Y for Yes This is disabled when Value Set is not Custom (or Questions is in production).
Option / Display	Option to display to the user. Maximum Number of characters: 70

To enter more than one options:

- Under the Code column, enter the code
- Press Tab
- Enter the display
- Press Tab and a new line will appear.

There is no limit on the number of options.

Note: When promoted to production you will no longer be able to:

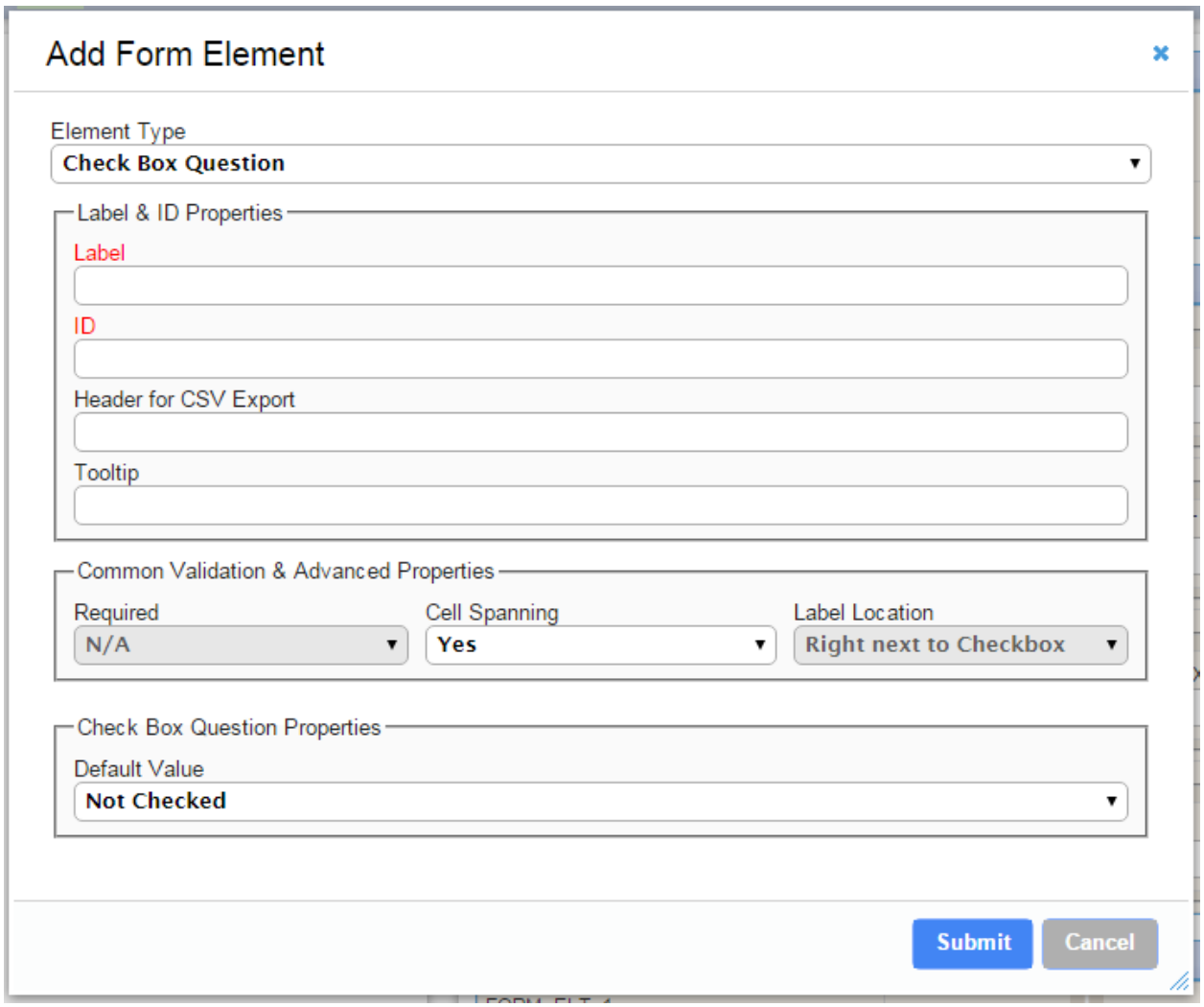
- Delete an option
- Change the Code

You will be able to:

- Hide the option (Will be hidden in forms where the option was not selected)
- Change the Display
- Change the default option

6.4.4 Checkbox Question

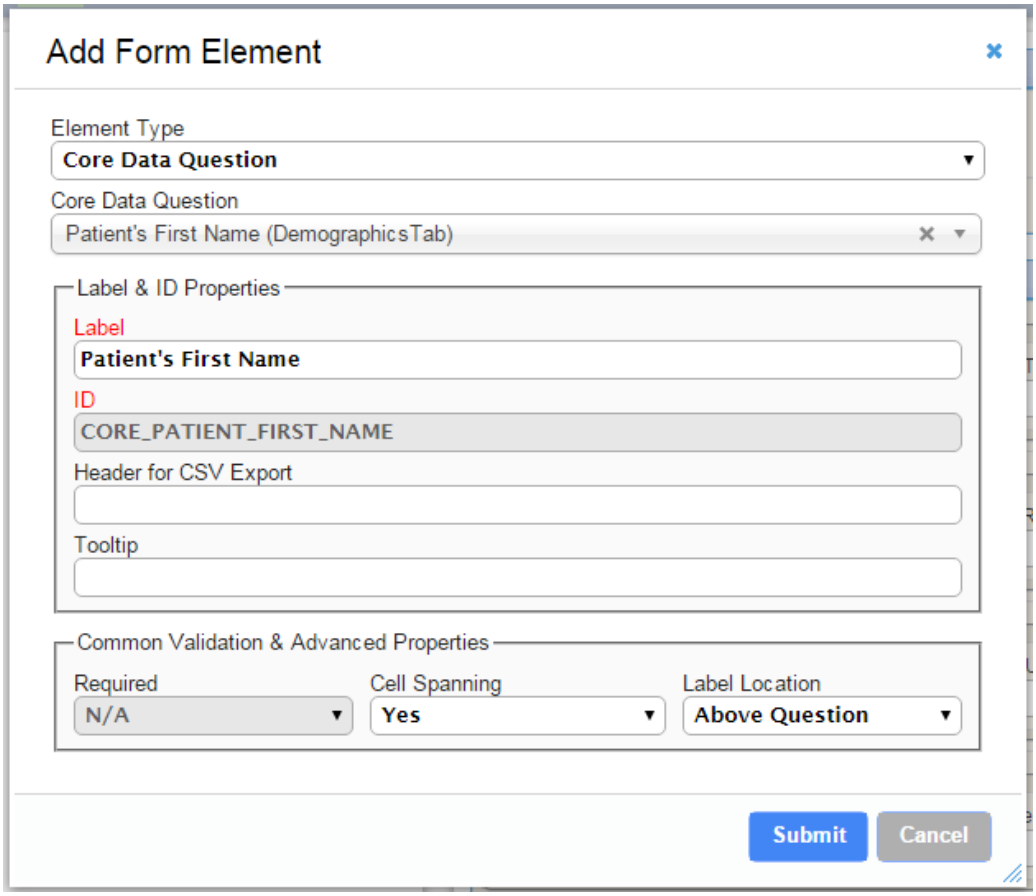
A Checkbox Question is a Question where the user can answer by checking or unchecking a checkbox. It is equivalent to a Yes/No Dropdown Question.



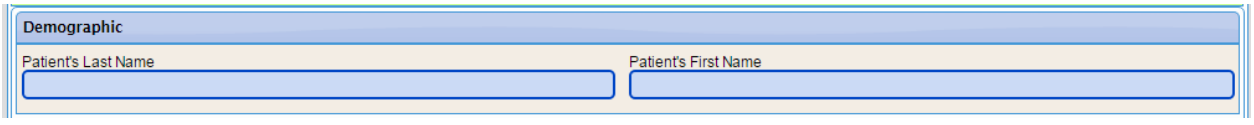
If you want the check box to be checked by default, set Default Value to **Checked.** Otherwise, set it to **Not Checked.**

6.4.5 Core Data Question (**New in Feb 2016 Release**)

A Core Data Question is a Question that is already part of the investigation. It can be answered when it is defined (example: Patient First Name in the Demographic Tab). Once included in the Form, you will be able to view the answer but will not be able to edit it.
It will appear in Blue.

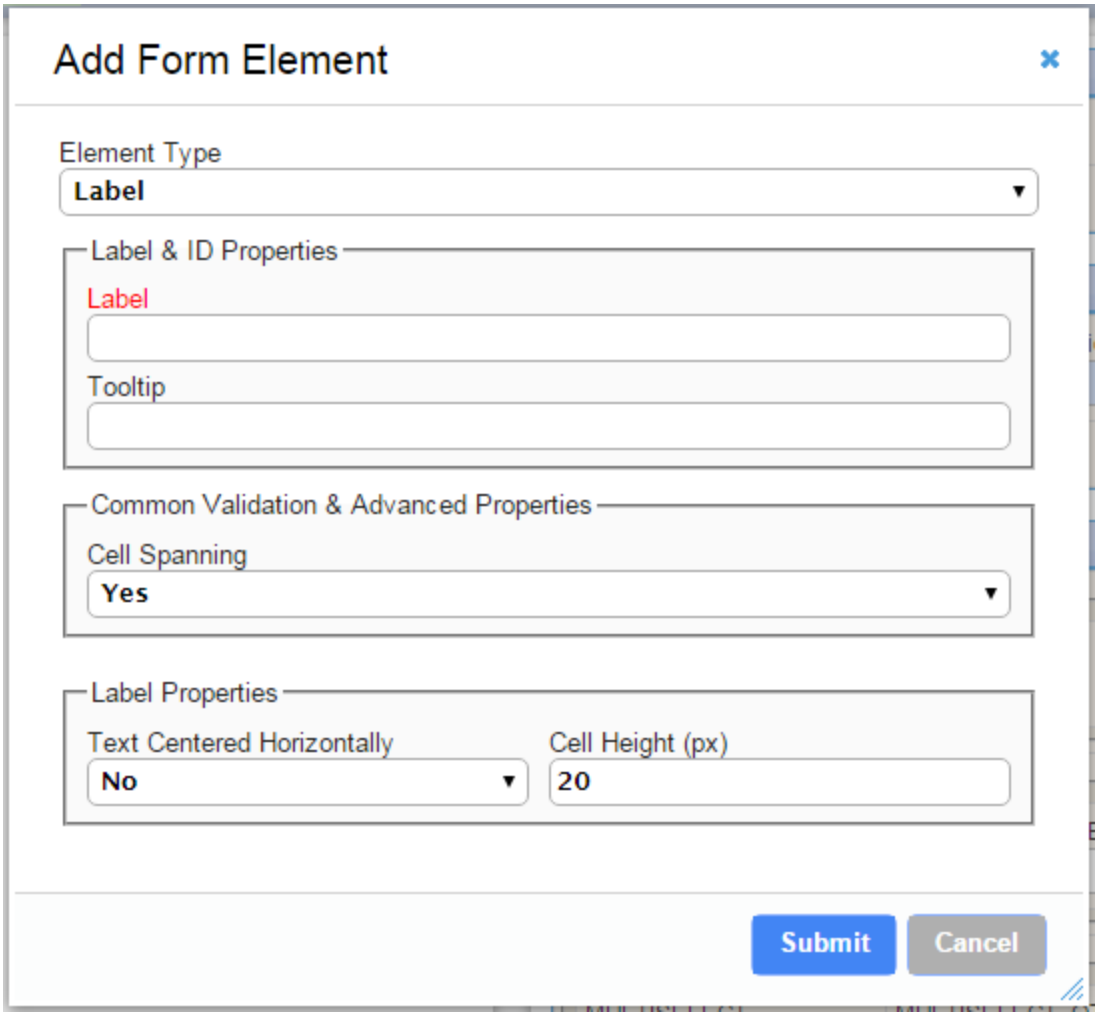


Example of Patient's Last Name and First Name added to a form:



6.4.6 Label Form Element **(New in Feb 2016 Release)**

A **Label** Form Element type is just a way to add some read only free text or label in a cell. It is mainly used within tables.

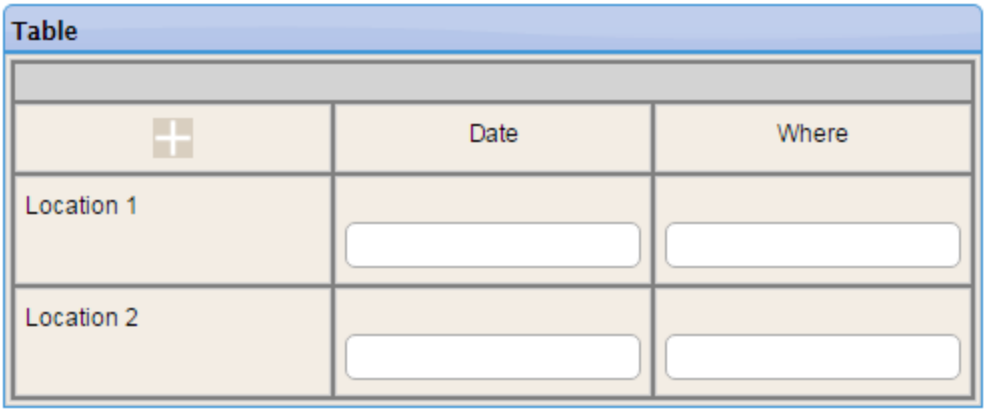


Definition:

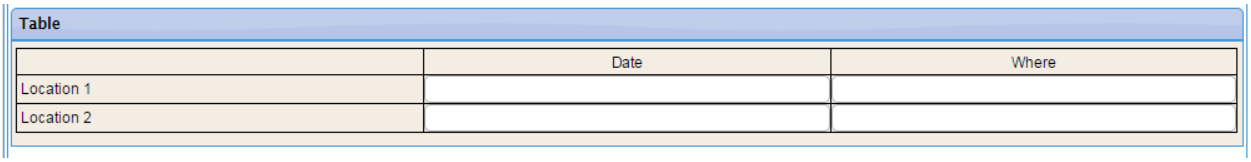
Text Centered Horizontally	By default the text is aligned to the left of the cell. You will be able to center it horizontally. Generally, Column Table Labels will be centered Horizontally where Table Row Labels will not be. The default value is **No.**
Cell Height (px)	Increase this number to force the header to be bigger. Valid values are from 1 to 50. Default is **20**.

Example of using Labels:

You can use Label within a Table Form Element (See Table Form Element):

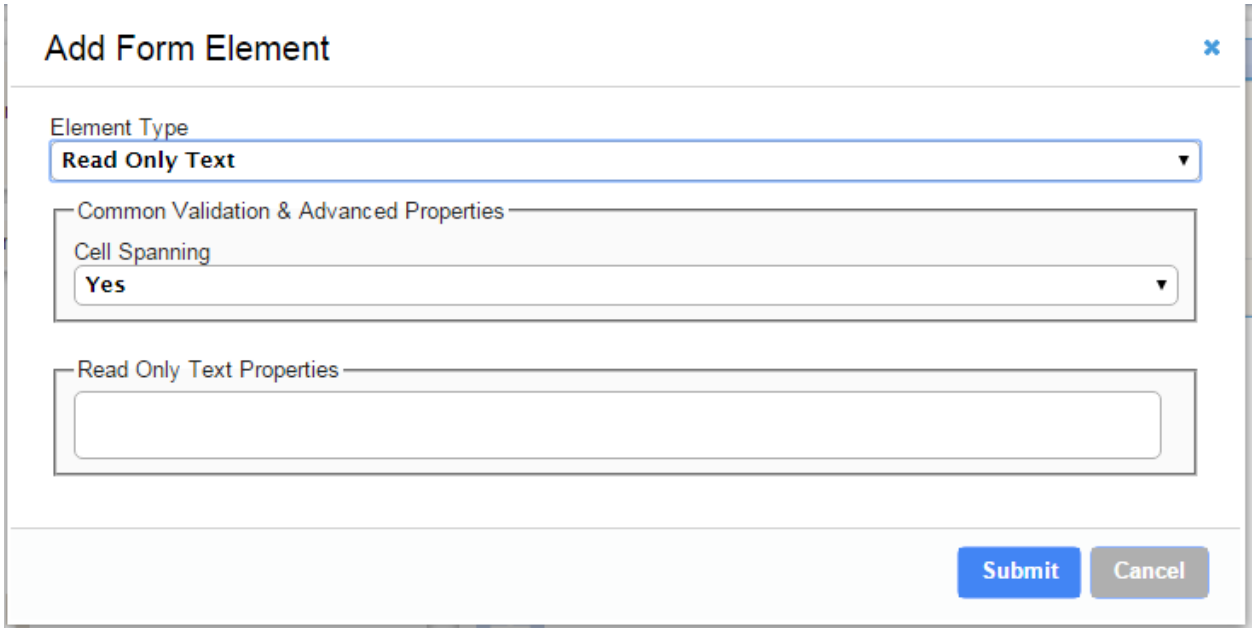


The data entry form will look like this:

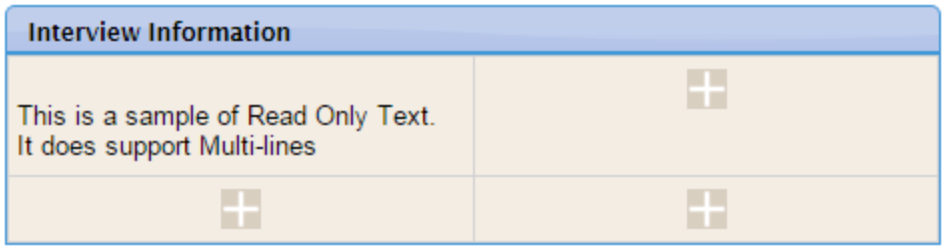


6.4.7 Read Only Text Form Element **(New in May 2016 Release)**

A **Read Only Text** Form Element type is just a way to add some multitext read only free text in a cell.

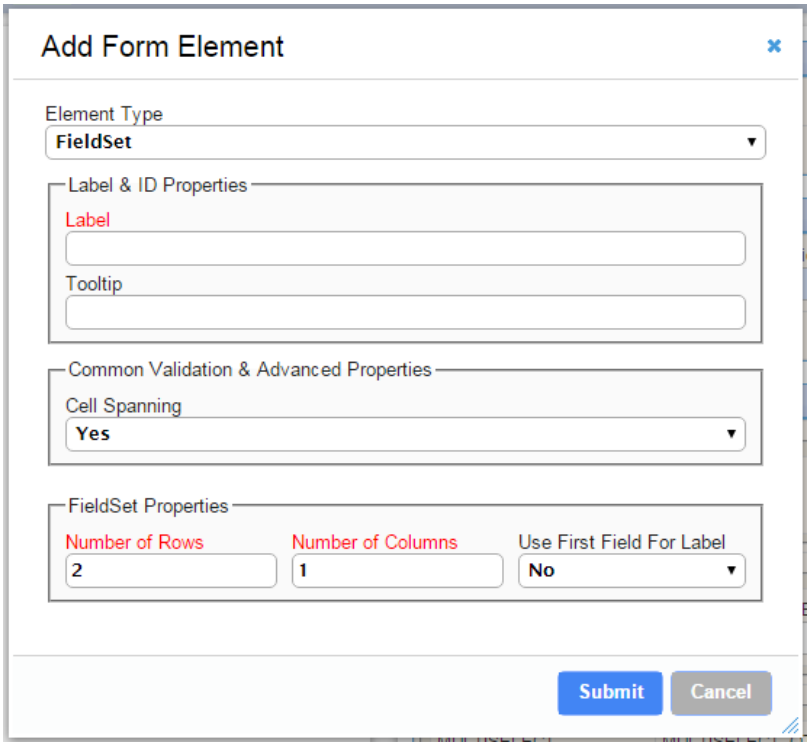


Example:

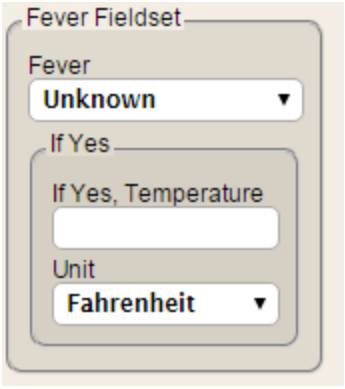
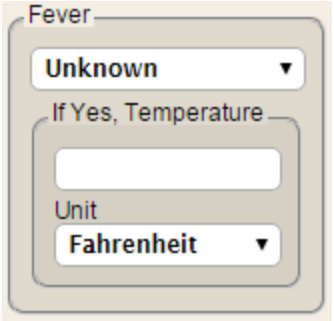


6.4.8 Fieldset Form Element (New in Feb 2016 Release)

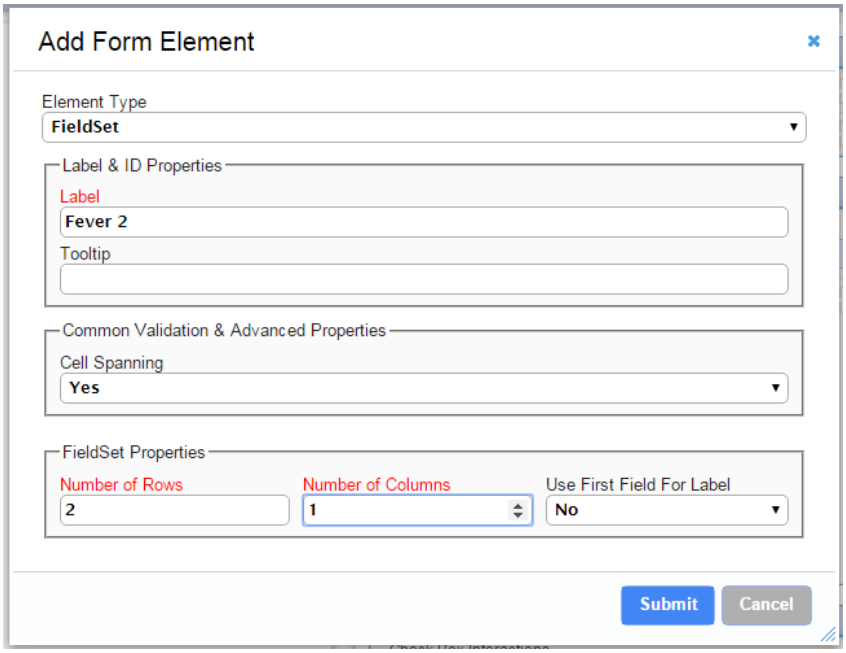
A **FieldSet** Form Element type is a way to logically group some elements within a section. You can have FieldSets within FieldSets.



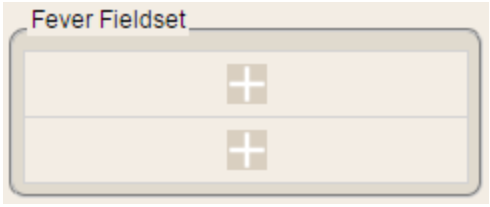
Definition:

Number of Rows	When creating a fieldset, the form builder will display a virtual table where you can add Form Elements. **Number of Rows** define the number of rows you would like this table to have. You can change the number at any time. This is a required field.
Number of Columns	When creating a fieldset, the form builder will display a virtual table where you can add Form Elements. **Number of Columns** define the number of columns you would like this table to have. You can change the number at any time. This is a required field.
Use First Field For Label	In some cases, you will want to move the label of a question to the header of the fieldset. Example:  To move the Fever Label of the Fever question to the Fever Fieldset, edit the fieldset and select **Yes** for Use First Field For Label. It will then use the label of the question of the first cell (first row, first column). The same applies to temperature. The result will be: 

Example: Field set with 2 rows and one column:

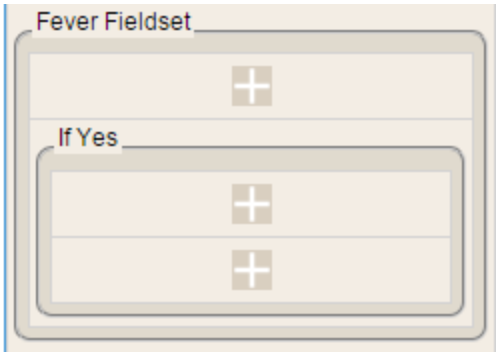


The form builder will then display the following:



Everything that applies to other Form Elements (drag and drop, adding form element to table cells….) will apply to this Field Set. Exception: a fieldset cannot be moved to the left panel.

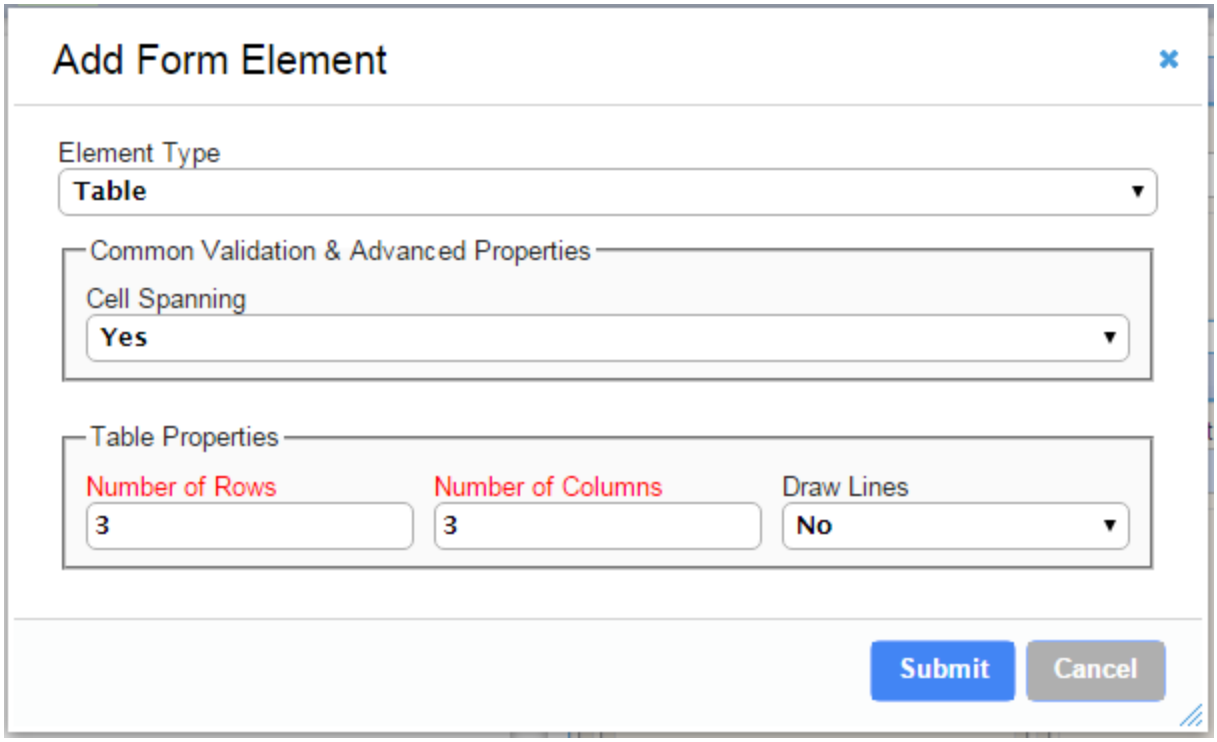
This means that you can add question form elements and even another fieldset within a fieldset:



6.4.9 Table Form Element (New in Feb 2016 Release)

A **Table** Form Element type is just another way to organize Form Elements by adding table within table cell. This means that you can:

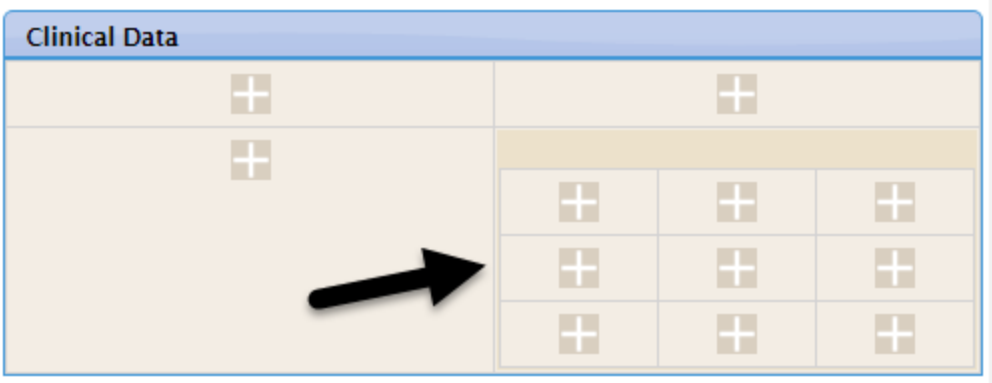
- Tables within Section Table Cell
- Tables with Fieldset Table Cell
- Table within another Table Cell



Definition:

Number of Rows	When creating a Table, the form builder will display a virtual table where you can add Form Elements. **Number of Rows** define the number of rows you would like this table to have. You can change the number at any time. This is a required field.
Number of Columns	When creating a Table, the form builder will display a virtual table where you can add Form Elements. **Number of Columns** define the number of columns you would like this table to have. You can change the number at any time. This is a required field.
Draw Lines	By default, Table Cell will not be visible to the end user but if you want them to appear select **Yes.** This is useful if you want an excel like table to appear on the data entry form.

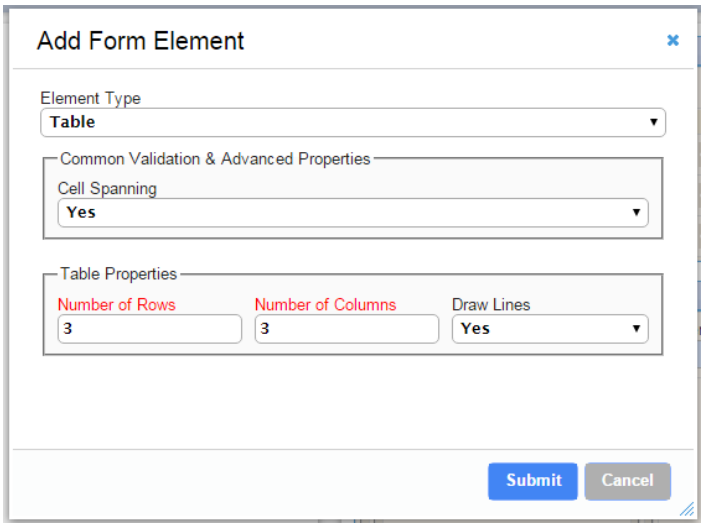
The form builder will then display the following:



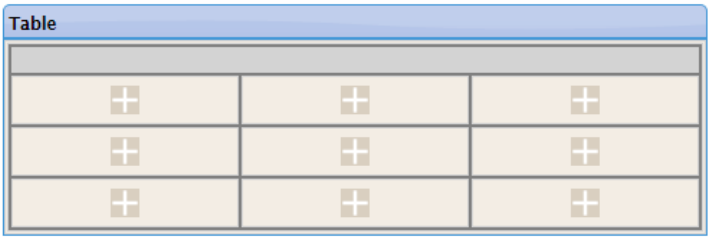
Everything that applies to other Form Elements (drag and drop, adding form element to table cells….) will apply to this Table. Exception: a Table cannot be moved to the left panel.

Excel like Table:

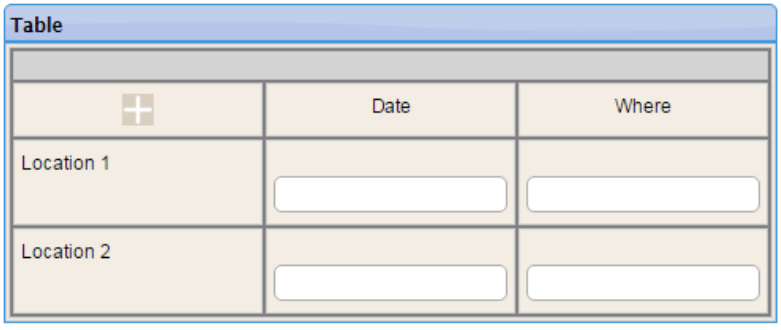
In order to add an excel like Table with lines, select Draw Lines:



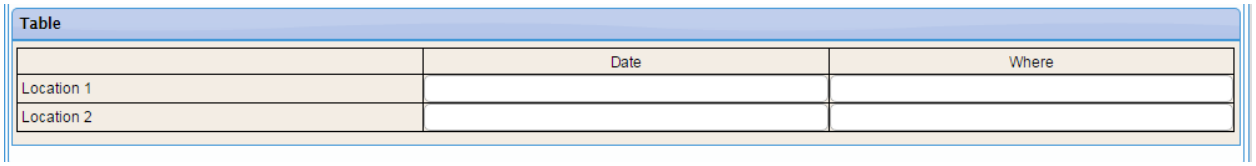
The form builder with then display the following:



Next Add Label Form Elements and Questions (where Label Location is Hidden) and you will now have:



The data entry user will see the following:



6.4.10 Form Element Label Location (New in Feb 2016 Release)

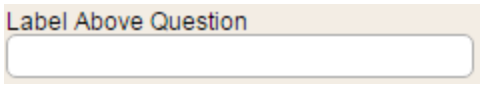
When adding or editing Form Element and for the following Element Type, you will be able to change the Label Location:

- Free Text Question
- Dropdown Question
- Multiselect Question
- Core Data Question

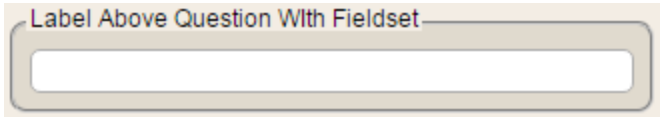
The configuration will appear in the Common Validation & Advanced Properties:

You can set the label location to:

- **Above Question** (Default): The label will located above the question:



- **Above Question with Fieldset**: The label will be located above the question but surrounded by a field set::



- **Hidden**: No label will be displayed (To be used within excel like table)

Note: For Checkbox Questions, it is set to “Right next to Checkbox” and cannot be changed:

7 Copy and Paste (New in Feb 2016 Release)

When you want to add similar questions where only the label will be different (example Yes/No/Unknown questions), you can use the left panel and the Bulk Add functionality.

To use the Bulk Add functionality::

1. Click on the icon on the left panel
2. Set the question parameters the way you want it
3. Click on Bulk Add
4. Press Submit
5. Questions get added to the left panel but do not close. All parameters but the label and ID remain unchanged.
6. You can add more questions by entering a different label.

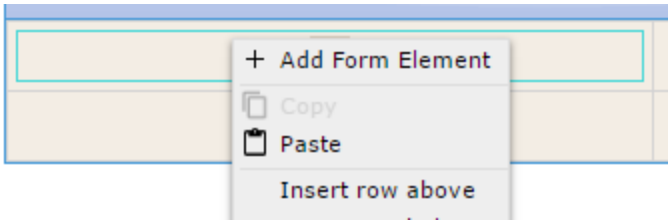
This is useful, but sometimes you need to add one question that is similar to an existing question. For this scenario, you can use the Copy and Paste function.

To use the Copy and Paste function:

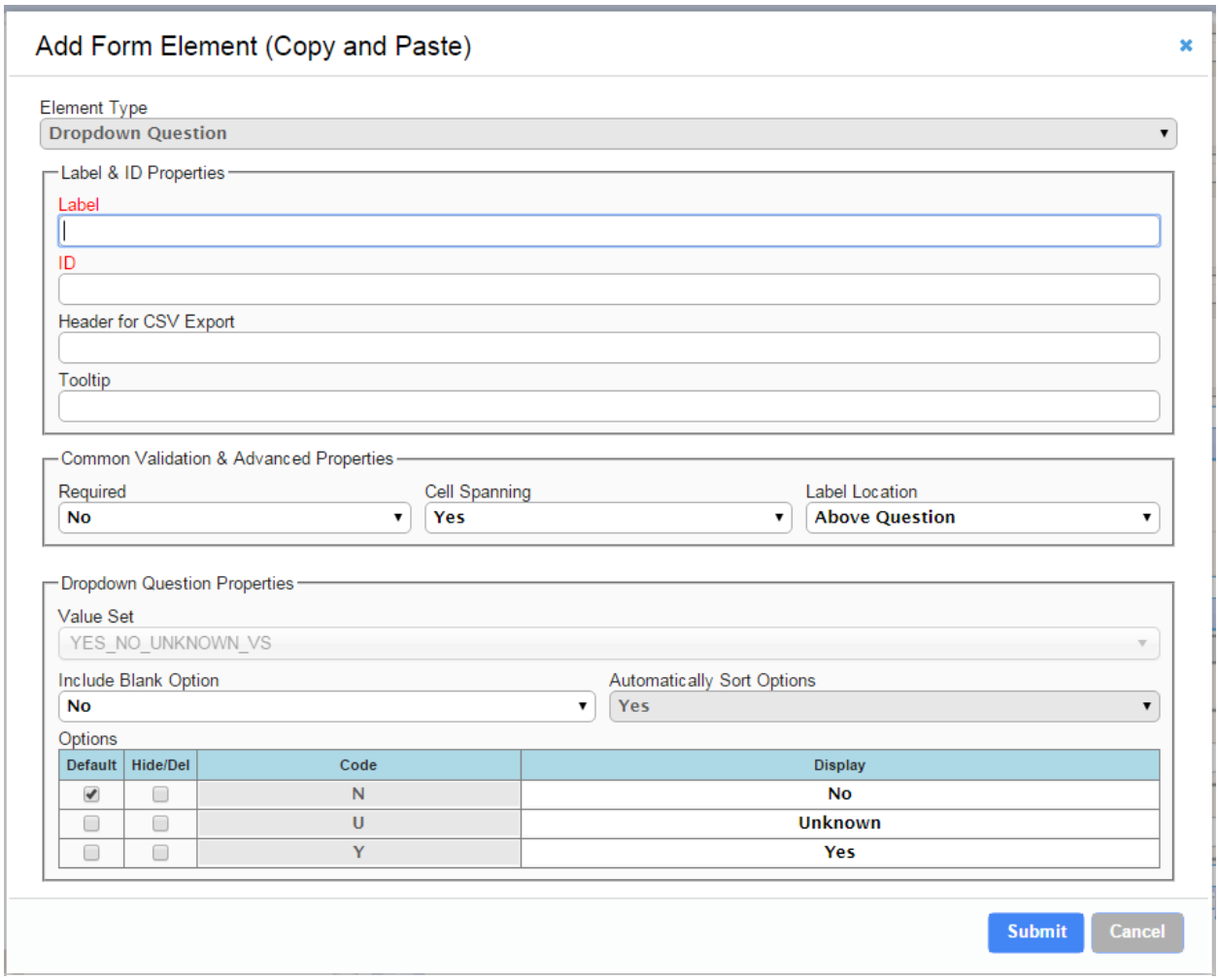
1. Select the Question you want to copy (note the blue highlight around the question)

2. Press Ctrl+C on your keyboard
3. Select an empty Table Cell (note the blue highlight around the question)

Note: You can also us the context menu to copy and paste:



4. Press Ctrl+V on your keyboard. The following Dialog will appear:



It is a full copy of the original Question (exception applies). Enter the new label and ID.

Exceptions:

- ~~You cannot Copy and Paste a Table Form Element~~ (New in May 2016 Release)
- ~~You cannot Copy and Paste a Fieldset Form Element~~ (New in May 2016 Release)
- You cannot Copy and Paste a Core Data Question
- Date Validations are not copied over
- Interactions are not copied over

8 Question Interactions (New in Feb 2016 Release)

The following sections will explain how you can define interaction between questions. **Please note that a question can only be part of an interaction if it is within the Form Layout. For this reason you will not be able to remove questions with interaction from the Form Layout.**

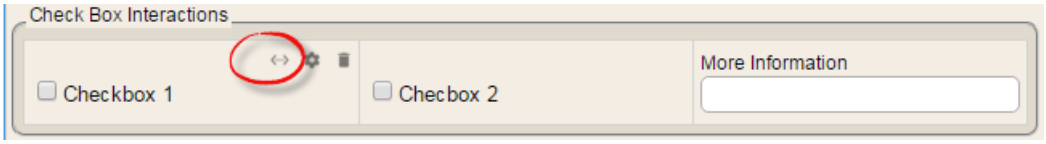
8.1 Check boxes state change (New in Feb 2016 Release)

You can enable or disable some questions based on the state of a checkbox. For example, If you look at the following checkboxes:

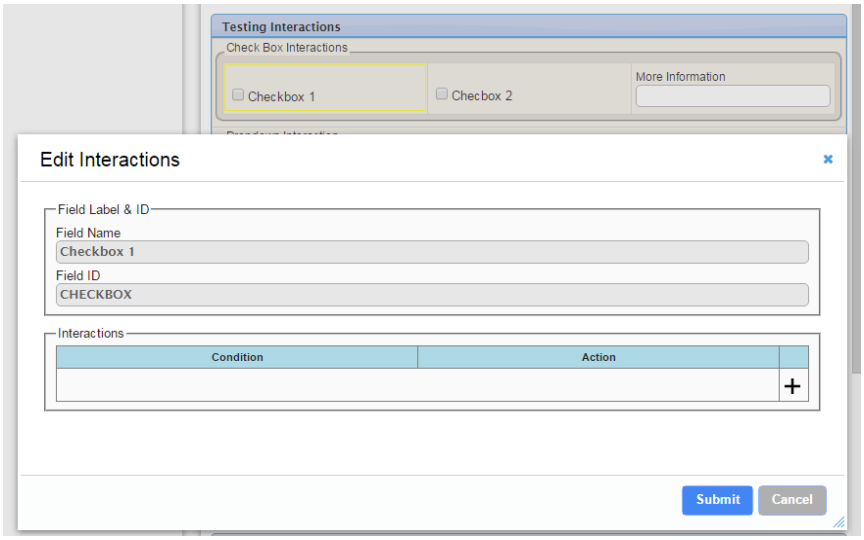
If you want to:

- Enable **Checkbox 2** if **Checkbox 1** is checked
- Enable **More Information** if **Checkbox 2** is checked
- Disable **Checkbox 2** if **Checkbox 1** is not checked
- Disable **More Information** if **Checkbox 1** is not checked
- Disable **More Information** if **Checkbox 2** is not checked

First, click the interaction icon on the **Checkbox 1** Question:



The following Dialog will appear:



This is where you will define the interaction to disable or enable other questions based on the state of **Checkbox 1**.

Step 1: Add the following interaction:

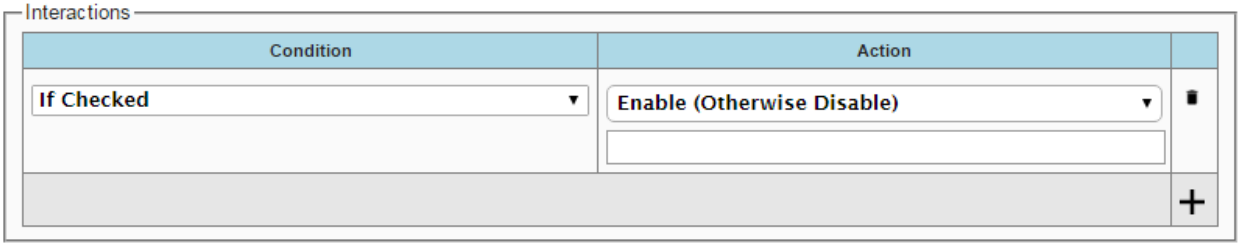
- Enable **Checkbox 2** if **Checkbox 1** is checked
- Disable **Checkbox 2** if **Checkbox 1** is not checked

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

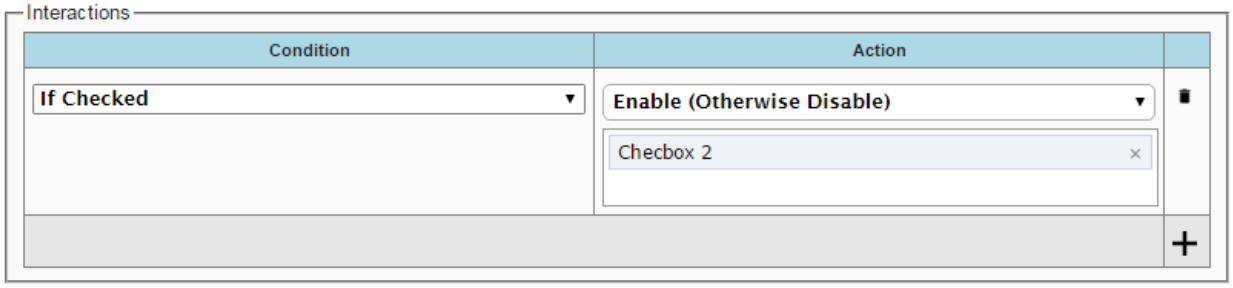
- If **Checkbox 1** is checked, Enable **Checkbox 2.** Otherwise Disable **Checkbox 2.**

Process:

1. Edit interaction for Checkbox 1.
2. Click on the + on the interaction table. A new row will appear:



3. The condition is defaulted to **If Checked** and it is what we need (the other option is **if NOT Checked**).
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable** (Otherwise Enable) **and Disable Only**).
5. Select the Question(s) you would like to Enable when the checkbox is Checked. In this case, **Checkbox 2.**
6. The resulted interaction is:



Step 2: Add the following interaction:

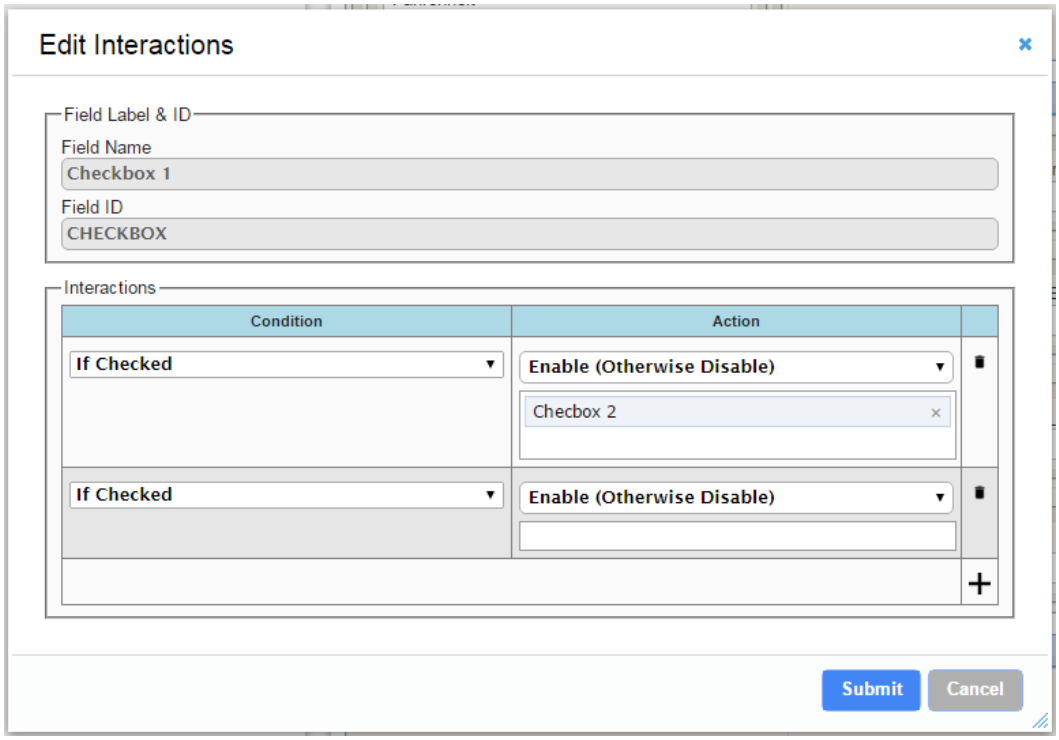
- Disable **More Information** if **Checkbox 1** is not checked

Before adding the interaction, simplify the interaction:

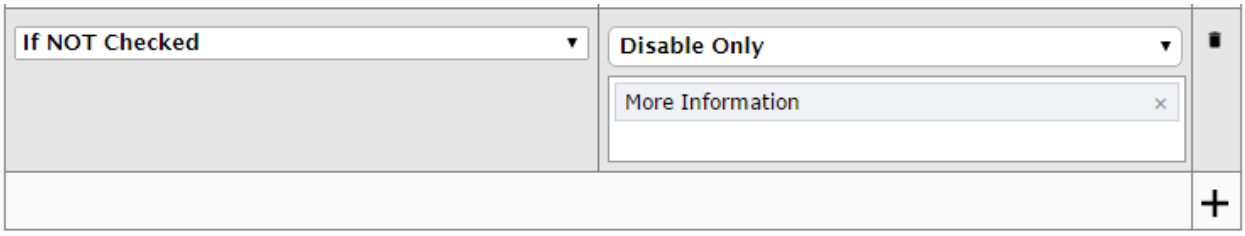
- If **Checkbox 1** is NOT checked, Disable **Checkbox 2**

Process:

1. Edit interaction for Checkbox 1.
2. Click on the + on the interaction table. A new row will appear:



3. Enter the interaction by selecting If **Not Checked** for the condition and **Disable Only** for the Action.
4. Select the Question(s) you would like to Disable when the checkbox is Not Checked. In this case, **More Information.**
5. The resulted interaction is:



Step 3:Add the following interaction:

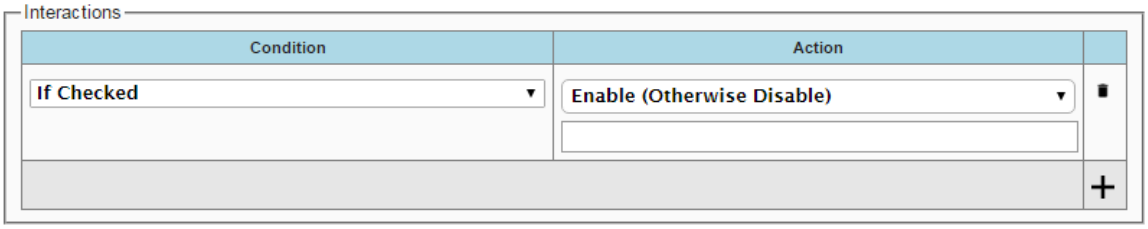
- Enable **More Information** if **Checkbox 2** is checked
- Disable **More Information** if **Checkbox 2** is not checked

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

- If **Checkbox 2** is checked, Enable **More Information.** Otherwise Disable **More Information.**

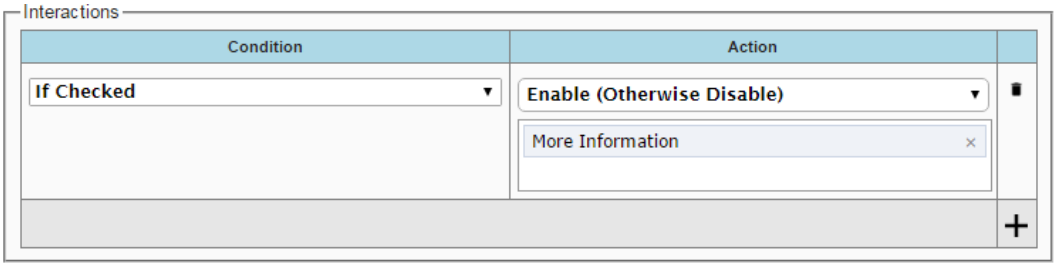
Process:

1. Edit interaction for Checkbox 2.
2. Click on the + on the interaction table. A new row will appear:



3. The condition is defaulted to **If Checked** and it is what we need (the other option is **if NOT Checked**).
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable** (Otherwise Enable) **and Disable Only**).
5. Select the Question(s) you would like to Enable when the checkbox is Checked. In this case **More Information.**

The resulted interaction is:



Result:

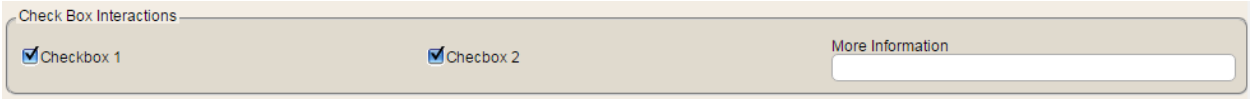
1. When **Checkbox 1** is not checked, **Checkbox 2** and **More Information** are disabled

2. If we check **Checkbox 1**, **Checkbox 2** is enabled and **More Information** stays disabled

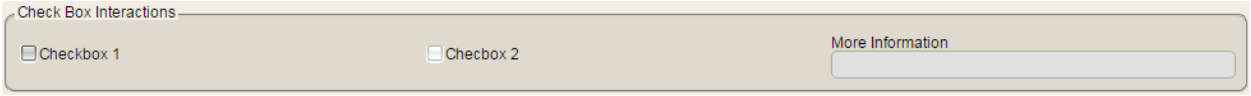
3. If we check **Checkbox 2**, **More Information** is enabled

4. If we uncheck **Checkbox 2**, **More Information** is disabled

5. If we check back **Checkbox 2**, **More Information** is enabled again



6. If we uncheck **Checkbox 1**, **Checkbox 2** and **More Information** are disabled

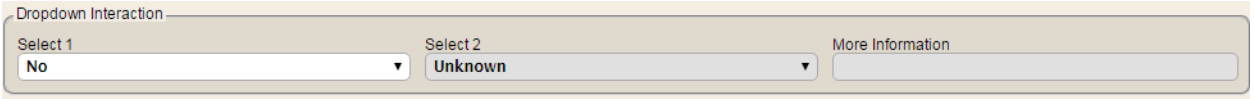


Notes:

- When a question is disabled, it goes back to it default value.
- The system will not validate the validity of all the interactions. It will not check for inconsistencies and duplicates.

8.2 Dropdown/MultiSelect select change (New in Feb 2016 Release)

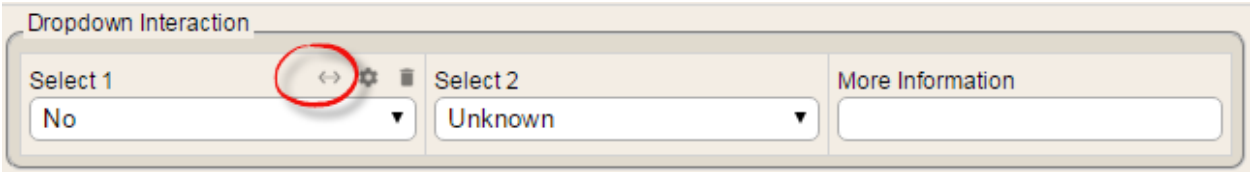
You can enable or disable some questions based on the selection of a dropdown (or multiselect) question. For example, if you look at the following dropdown:



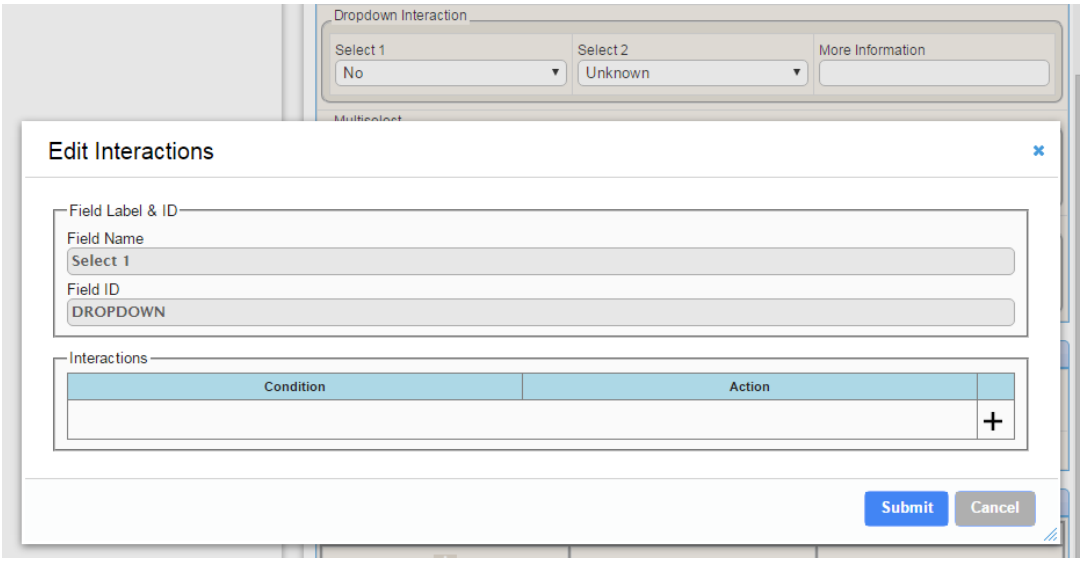
If you want to:

- Enable **Select 2** if **Select 1** selection is **Yes**
- Enable **More Information** if **Select 2** selection is **Other**
- Disable **Select 2** if **Select 1** selection is not **Yes**
- Disable **More Information** if **Select 1** selection is not **Yes**
- Disable **More Information** if **Select 2** selection is not **Other**

First, click the interaction icon on the **Select 1** Question:



The following Dialog will appear:



This is where you will define the interaction to disable or enable other questions based on the selection of **Select 1**.

Step 1: Add the following interaction:

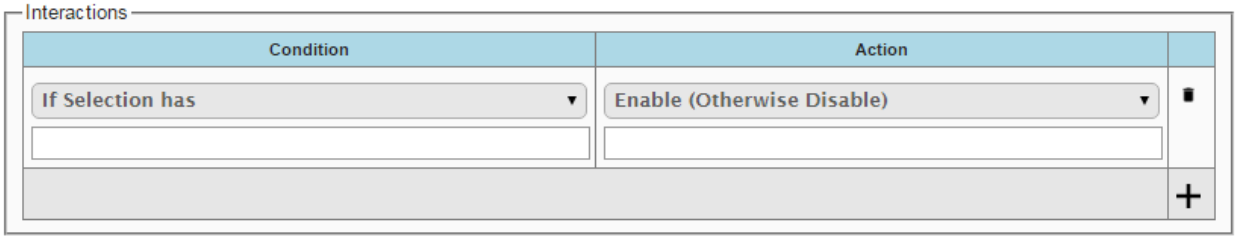
- Enable **Select 2** if **Select 1** is **Yes**
- Disable **Select 2** if **Select 1** is not **Yes**

Before adding the interaction, simplify the 2 defined interactions to a single one that will be:

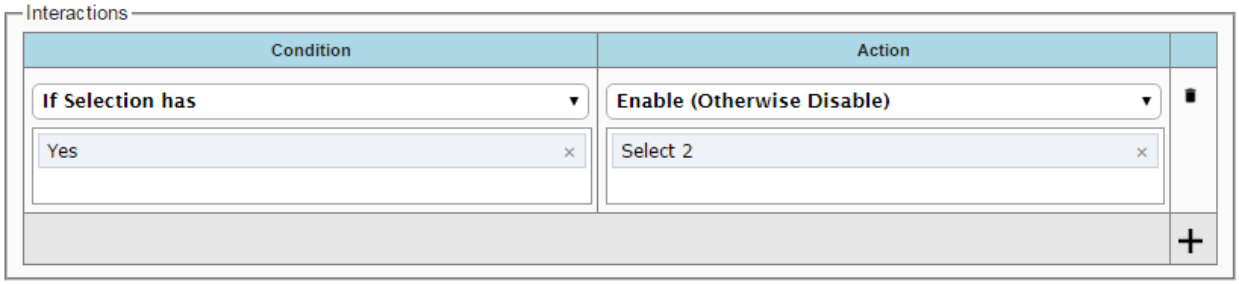
- If **Select 1** is **Yes** Enable **Select 2.** Otherwise Disable **Select 2.**

Process:

1. Click on the + on the interaction table. A new row will appear:



2. The condition is defaulted to **If Selection has** and it is what we need (the other option is **if Selection does NOT have**).
3. Select the option that meets your condition; in this case **Yes.**
4. The action is defaulted to **Enable (Otherwise Disable)** and this is what we need (the other options are **Disable** (Otherwise Enable) **and Disable Only**).
5. Select the Question(s) you would like to Enable when the the condition is met. In this case **Select 2.**
6. The resulted interaction is:



Step 2: Add the following interaction:

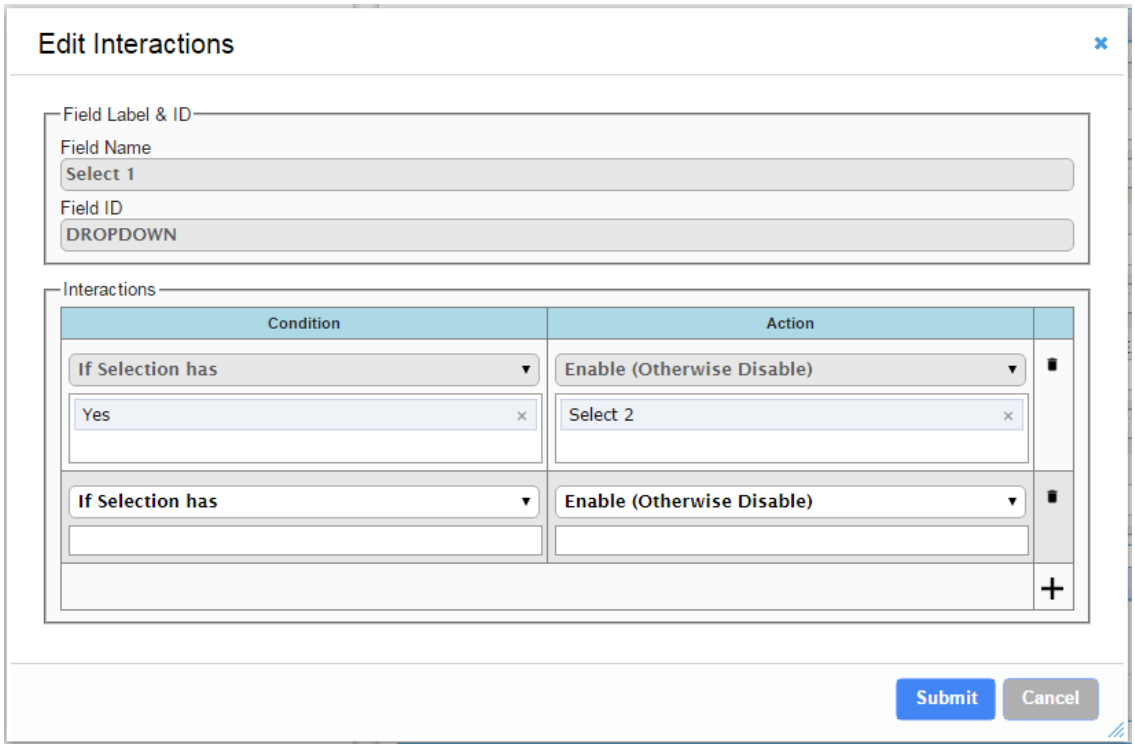
- Disable **More Information** if **Select 1** is not **Yes**

Before adding the interaction, simplify the interaction:

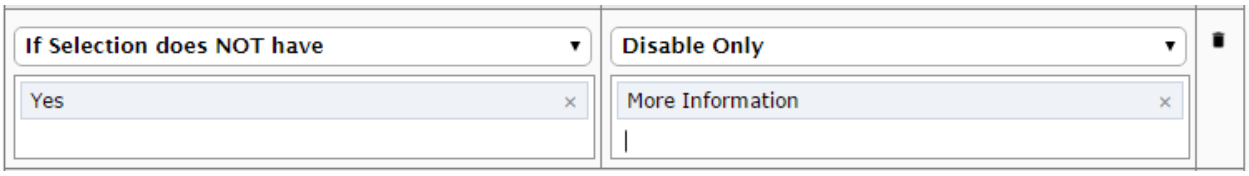
- If **Select 1** selection does NOT have **Yes,** Disable **Select 2**

Process:

1. Click on the + on the interaction table. A new row will appear:



2. Enter the interaction by selecting **If Selection does NOT have** for the condition.
3. Select **Yes** for the condition.
4. Select **Disable Only** for the Action.
5. Select the Question(s) you would like to Disable when the condition is met. In this case **More Information.**
6. The resulted interaction is:



Step 3: Add the following interaction:

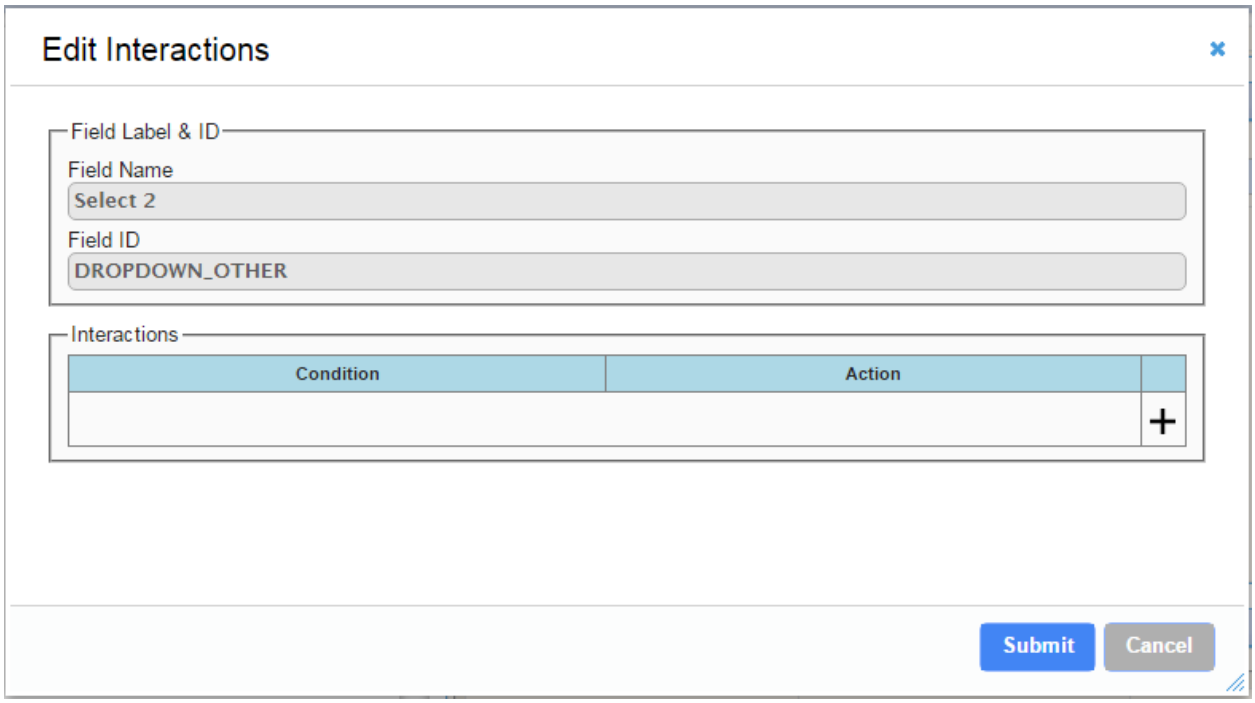
- Enable **More Information** if **Select 2** selection is **Other**
- Disable **More Information** if **Select 2** selection is not **Other**

Before adding the interaction, simplify the interaction:

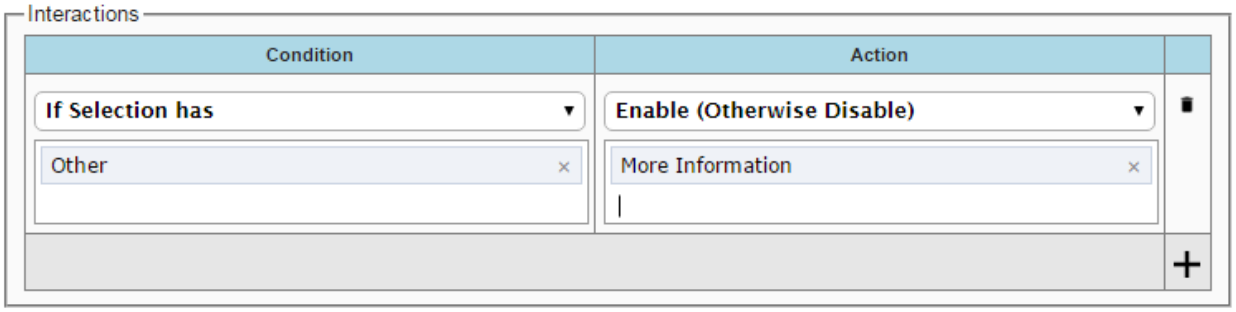
- If **Select 1** selection has **Other,** Enable **More Information.** Otherwise, disable.

Process:

1. Click on the + on the interaction table. A new row will appear:



2. Enter the interaction by selecting **If Selection has** for the condition.
3. Select **Other** for the condition.
4. Select **Enable (Otherwise Disable)** for the Action.
5. Select the Question(s) you would like to Disable when the condition is met. In this case **More Information.**
6. The resulted interaction is:

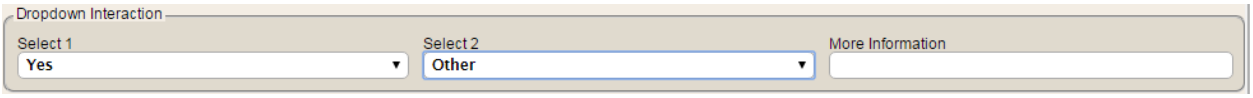


Result:

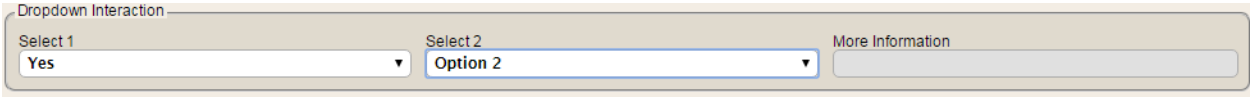
1. When **Select 1** is not **Yes**, **Select 2** and **More Information** are disabled

2. If we select **Yes** for **Select 1**, **Select 2** is enabled and **More Information** stays disabled

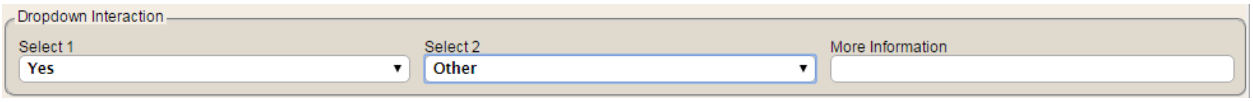
3. If we select **Other** for **Select 2**, **More Information** is enabled



4. If we select something else than **Other** for **Select 2**, **More Information** is disabled



5. If we select back **Other** for **Select 2**, **More Information** is enabled again



6. If we select something else than **Yes** for **Select 1**, **Select 2** and **More Information** are disabled

Notes:

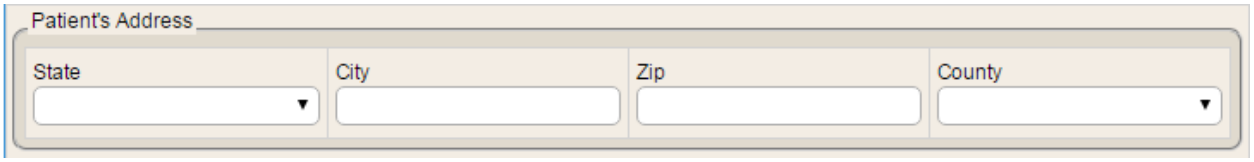
- When a question is disabled, it goes back to it default value.
- The system will not validate the validity of all the interactions. It will not check for inconsistencies and duplicates.

8.3 Address Geographical Mapping Autocomplete **(New in May 2016 Release)**

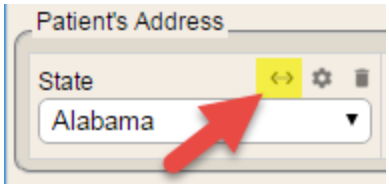
If you want the City/Zip/County to autocomplete as you type. You need to define the following 4 Questions:

- State as **Dropdown Question** and Value Set **State**
- City as **Free Text Question/Plain Text** with at least 70 Maximum number of characters recommended
- Zip Code as **Free Text Question/Zip Code**
- County as **Dropdown Question** and Value Set **CODESET_COUNTY**

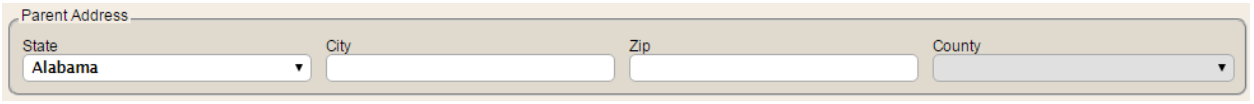
Example:



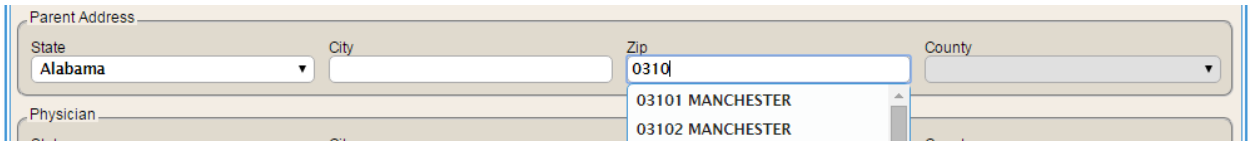
Once this is done edit the State interactions by clicking on the following icon:



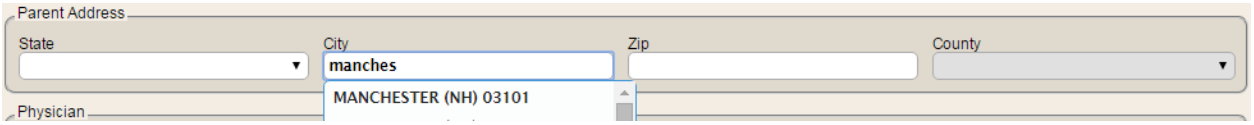
Example of output of Data entry Form:



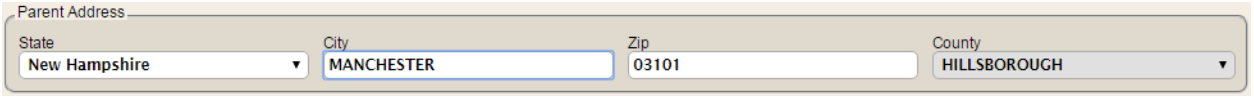
As you enter a Zip code, it will like you all the valid zip code/city options:



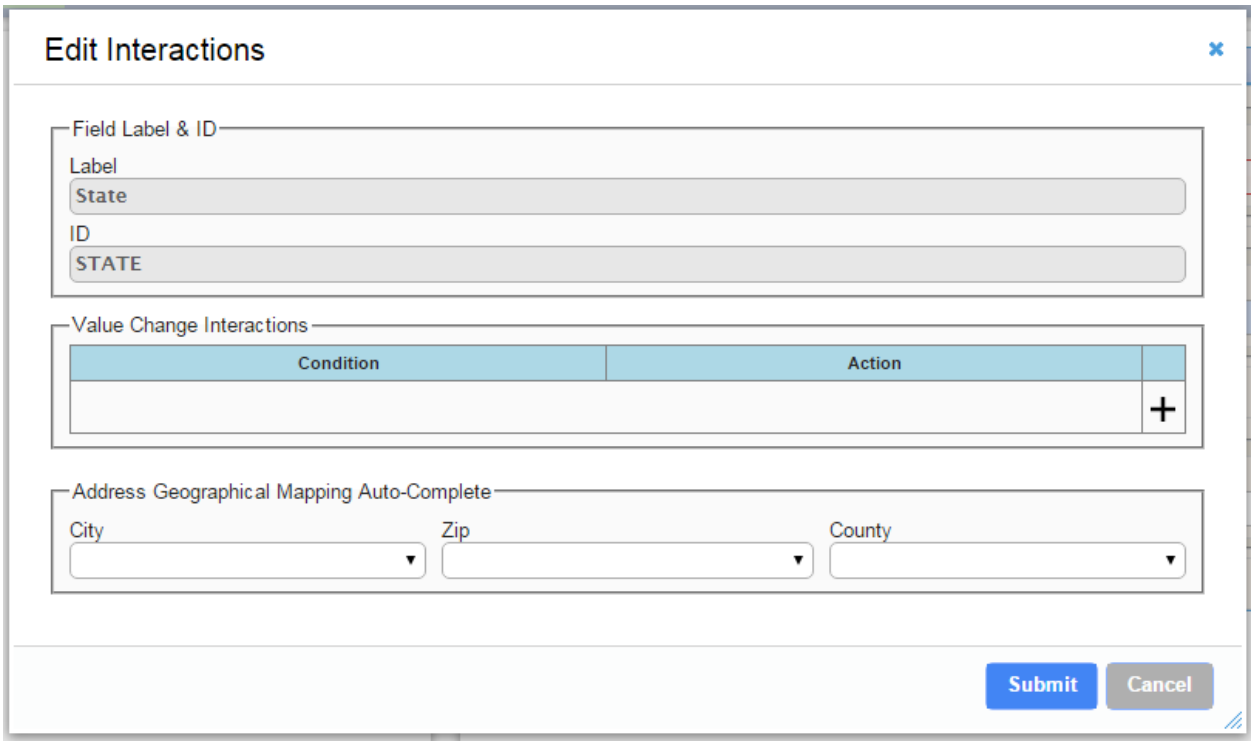
As you enter a City, it will like you all the valid zip code/city options:



When the selection is made, all the other fields will be populated with the correct value



The following Dialog will appear:



Because you edited the interaction on a question of type **Dropdown Question** and Value Set **State,** you see an an addition section called Address **Geographical Mapping Auto-Complete**.
If you select the associated question for City, Zip and County then the database entry form include the following logic:

- Autocomplete for City and Zip that will populate all other fields
- County will be disabled for out of state addresses.
- User will be forced to enter a valid Geographical Mapping for in state addresses.

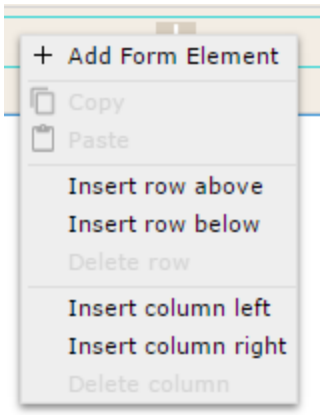
Notes:

- if City, Zip or County is field then the City, Zip and County are required.
- Once the City is within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.
- Once the Zip within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.
- Once the County is within a geographical Mapping interaction, it will not be available on another geographical Mapping interaction.

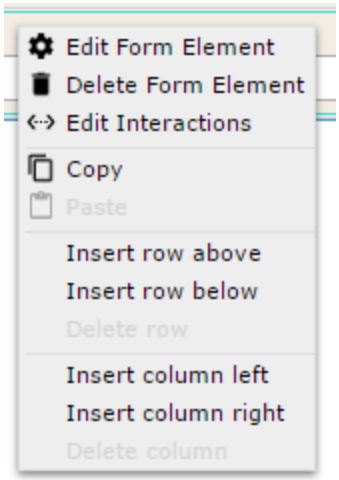
9 Form Builder Context Menu (New in May 2007 Release)

In you right click on any form element, table, fieldset or any empty cell. For example:

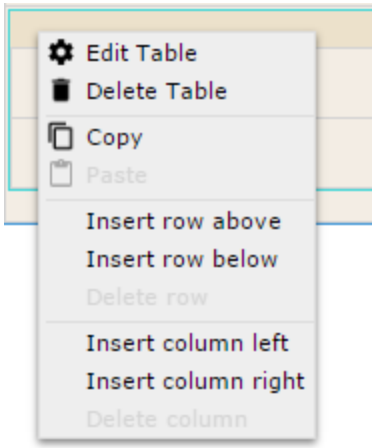
- Empty cell:



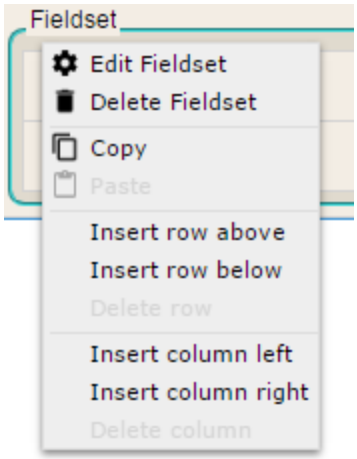
- Form Element:



- Table (Top part):



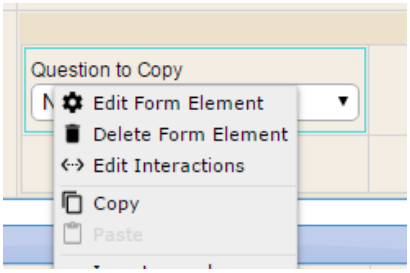
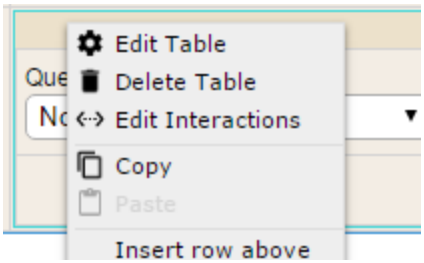
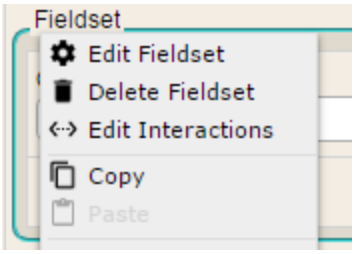
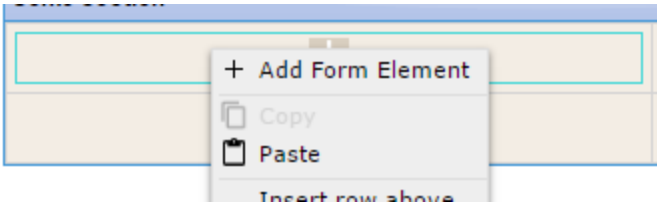
- Field set (Top part):

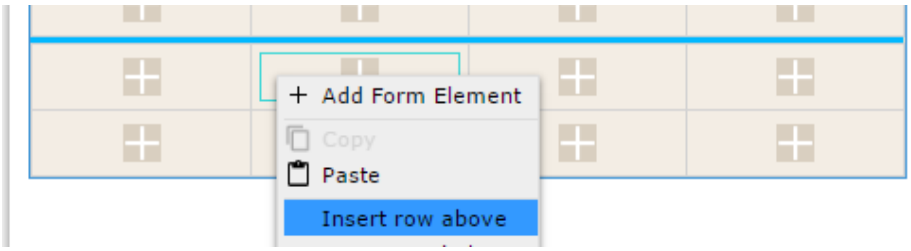
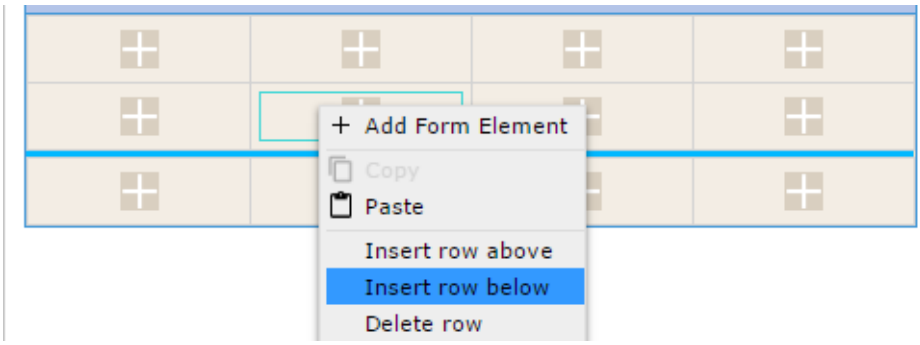
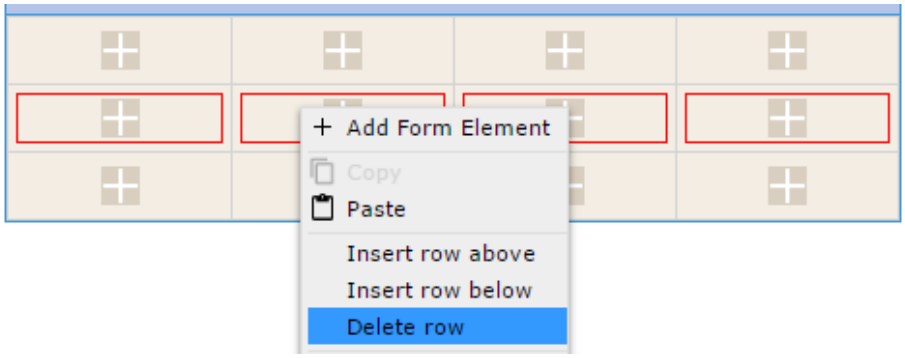


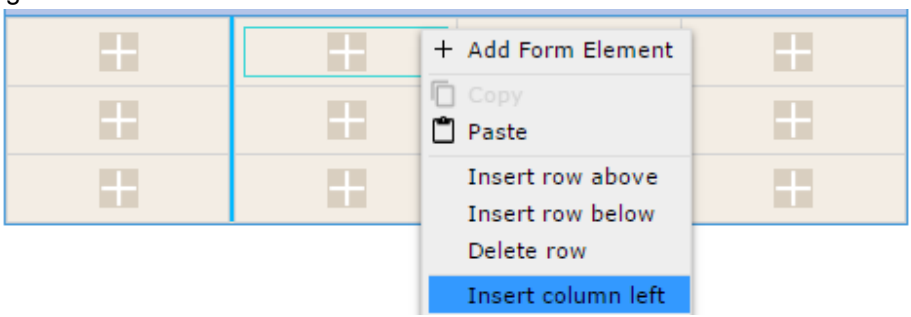
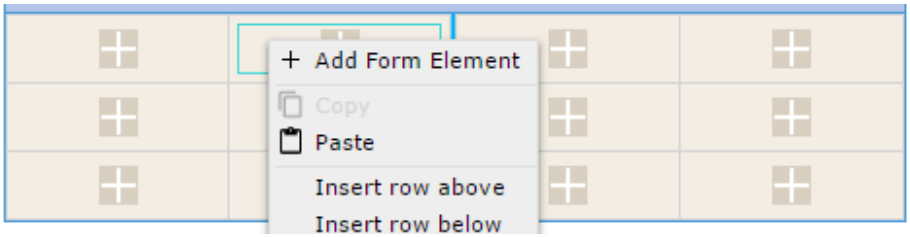
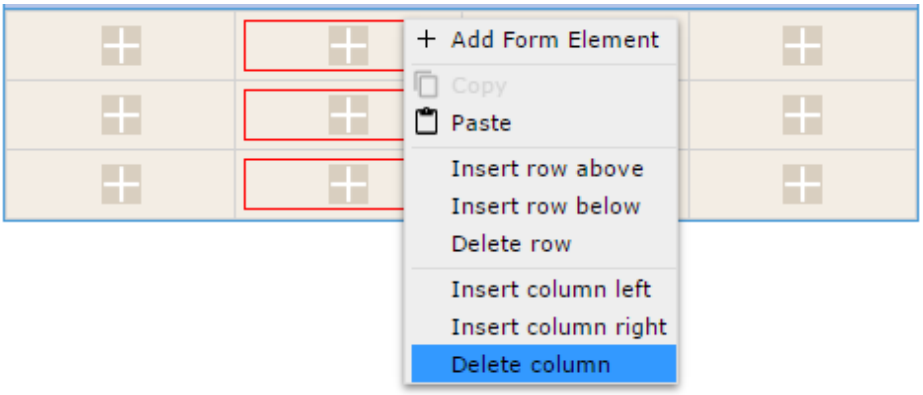
Definitions:

Menu	Description
Add Form Element	Use this context menu if you want to add a form element within the empty cell you right clicked on. It is the equivalent of clicking on the beige icon within an empty cell. Note: This context menu is available only if you right click on an empty cell.
Edit Form Element	Use this context menu if you want to edit a form element. It is the equivalent of moving your mouse over the form element and click on the edit icon: Note: This context menu is available only if you right click on a form element (except for table or fieldset).

Delete Form Element	Use this context menu if you want to delete a form element. It is the equivalent of moving your mouse over the form element and click on the delete icon: Note: This context menu is available only if you right click on a form element (except for table or fieldset).
Edit Interactions	Use this context menu if you want to edit the form element interactions. It is the equivalent of moving your mouse over the form element and click on the interactions icon: Note: This context menu is available only if you right click on a form element of type dropdown or checkbox.
Edit Table	Use this context menu if you want to edit a table. It is the equivalent of moving your mouse over the top part of a table and click on the edit icon: Note: This context menu is available only if you right click on the top part of a table
Delete Table	Use this context menu if you want to delete a table. It is the equivalent of moving your mouse over the top part of a table and click on the delete icon: Note: This context menu is available only if you right click on the top part of a table
Edit Fieldset	Use this context menu if you want to edit a fieldset. It is the equivalent of moving your mouse over the top part of a fieldset and click on the edit icon: Note: This context menu is available only if you right click on the top part of a fieldset
Delete Fieldset	Use this context menu if you want to delete a fieldset. It is the equivalent of moving your mouse over the top part of a fieldset and click on delete icon: Note: This context menu is available only if you right click on the top part of a fieldset

Copy	Use this context menu if you to copy a form element, table or fieldset. To better identify the element you are copying will be highlighted in blue. Examples:    This is the equivalent of pressing Ctrl+C Note: This context menu is enable only if you right click a form element, table or fieldset.
Paste	Use this context menu if you to paste a copied form element, table or fieldset to an empty cell. To better identify the empty cell you are pasting to will be highlighted in blue. Examples:  This is the equivalent of pressing Ctrl+V Note: This context menu is enable only if you right click an empty cell and if you did a copy prior.

Insert row above	Use this context menu if you want to insert a row above the row you right clicked on:  Note: A blue line indicator will display as you select the menu to tell you where the line will be added.
Insert row below	Use this context menu if you want to insert a row above the row you right clicked on:  Note: A blue line indicator will display as you select the menu to tell you where the line will be added.
Delete row	Use this context menu if you want to delete the row you right clicked on:  Note: This menu is only enabled all the cell of the selected row are empty.

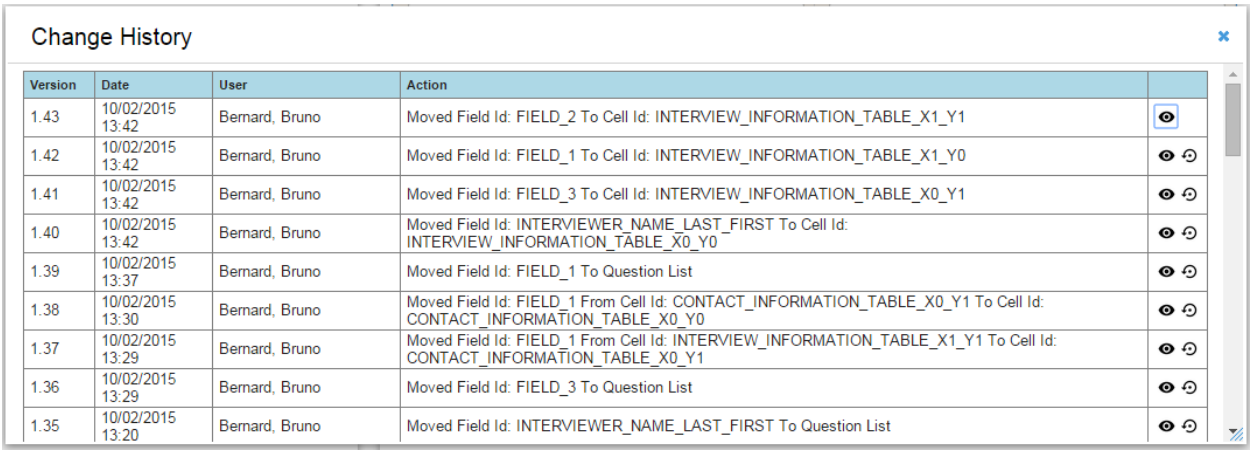
Insert column left	Use this context menu if you want to insert a column left of the column you right clicked on:  Note: A blue line indicator will display as you select the menu to tell you where the column will be added. This menu will be disabled if you already have the maximum number of columns for that section, table or fieldset.
Insert column right	Use this context menu if you want to insert a column right of the column you right clicked on:  Note: A blue line indicator will display as you select the menu to tell you where the column will be added. This menu will be disabled if you already have the maximum number of columns for that section, table or fieldset.
Delete column	Use this context menu if you want to delete the column you right clicked on:  Note: This menu is only enabled all the cell of the selected column are empty.

10 Form History/Reverting Changes

Every time a change is made, the form is saved automatically and a version number is assigned. For example, when working on version 1 of the form, the second number of the version will increment by one every time the form is saved and will be displayed next to the Form Name:

For more information about how the versions work see Versioning/Promote to Production Section.

If you click on (Form History) you will be able to see the changes that were made:



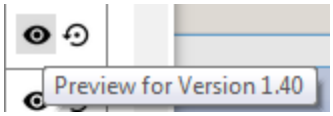
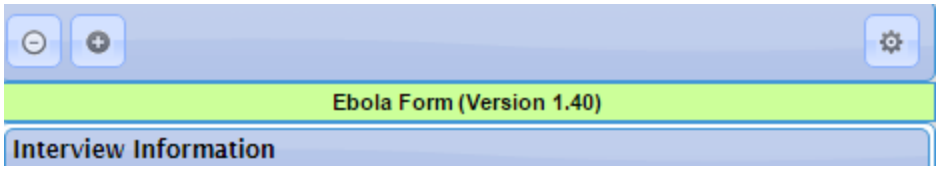
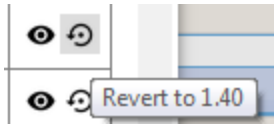
Version	Date	User	Action
1.43	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_2 To Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y1
1.42	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_1 To Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y0
1.41	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: FIELD_3 To Cell Id: INTERVIEW_INFORMATION_TABLE_X0_Y1
1.40	10/02/2015 13:42	Bernard, Bruno	Moved Field Id: INTERVIEWER_NAME_LAST_FIRST To Cell Id: INTERVIEW_INFORMATION_TABLE_X0_Y0
1.39	10/02/2015 13:37	Bernard, Bruno	Moved Field Id: FIELD_1 To Question List
1.38	10/02/2015 13:30	Bernard, Bruno	Moved Field Id: FIELD_1 From Cell Id: CONTACT_INFORMATION_TABLE_X0_Y1 To Cell Id: CONTACT_INFORMATION_TABLE_X0_Y0
1.37	10/02/2015 13:29	Bernard, Bruno	Moved Field Id: FIELD_1 From Cell Id: INTERVIEW_INFORMATION_TABLE_X1_Y1 To Cell Id: CONTACT_INFORMATION_TABLE_X0_Y1
1.36	10/02/2015 13:29	Bernard, Bruno	Moved Field Id: FIELD_3 To Question List
1.35	10/02/2015 13:20	Bernard, Bruno	Moved Field Id: INTERVIEWER_NAME_LAST_FIRST To Question List

It will display the following as a table:

- Version
- Date/Time
- User
- Action (What was changed)

At the end of every row there are 2 icons:

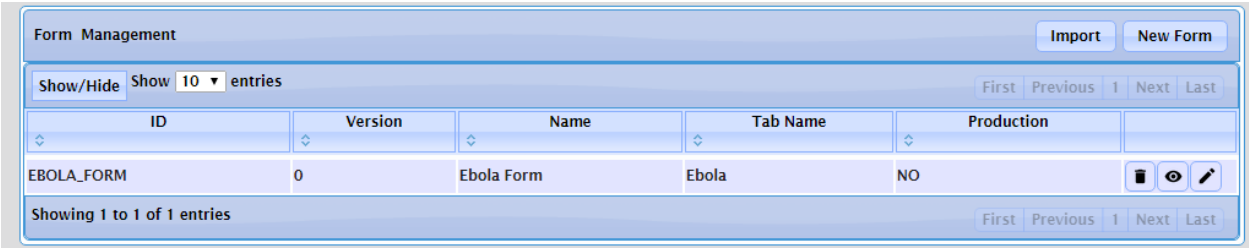
Definitions:

	This is the preview button. Hover your mouse over the preview button to tell you which version you are going to preview:  The preview window will also tell you the version you are previewing: 
	This is the revert button. Hover your mouse over the revert button to tell you which version it is going to revert to: 

11 Versioning/Promote to Production Section

11.1 Preliminaries

When creating a new Form, the Form version will be set to **0** and the Production field is set to **NO**:

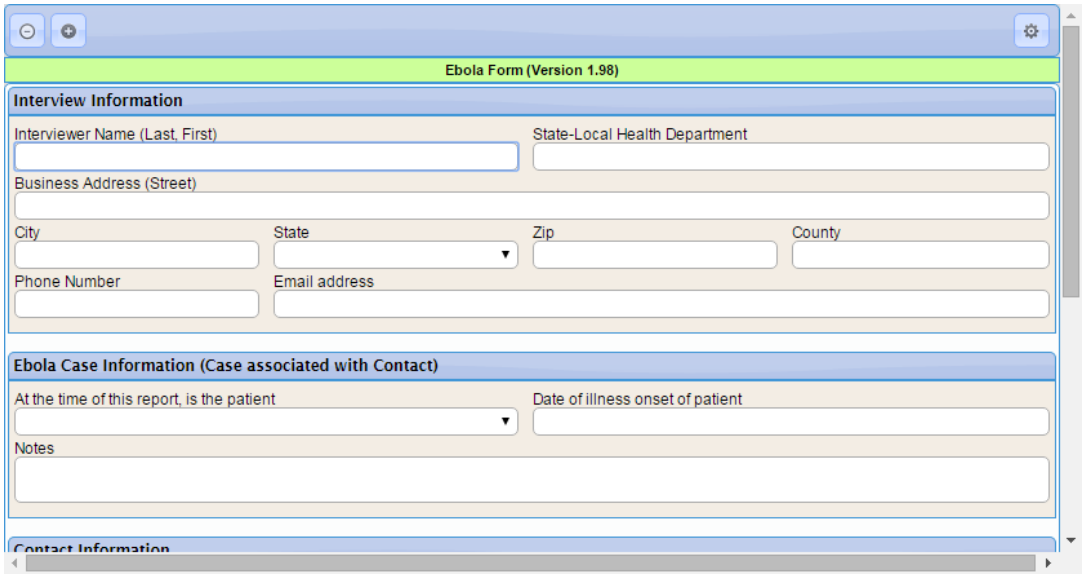


This indicates that the form is not available to be associated with a disease yet. In order to make the form available, it needs to be promoted to production.

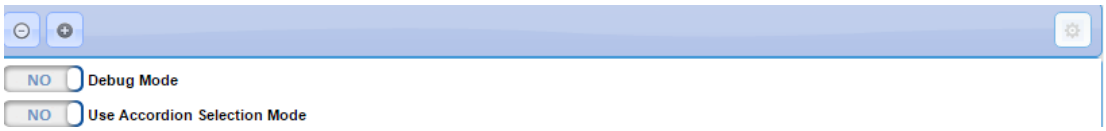
Before promoting a form to production, make sure your form has all the questions that need to be in the form and clear of mistakes.

It is recommended to use the Form Preview to review the form before promoting it to production:

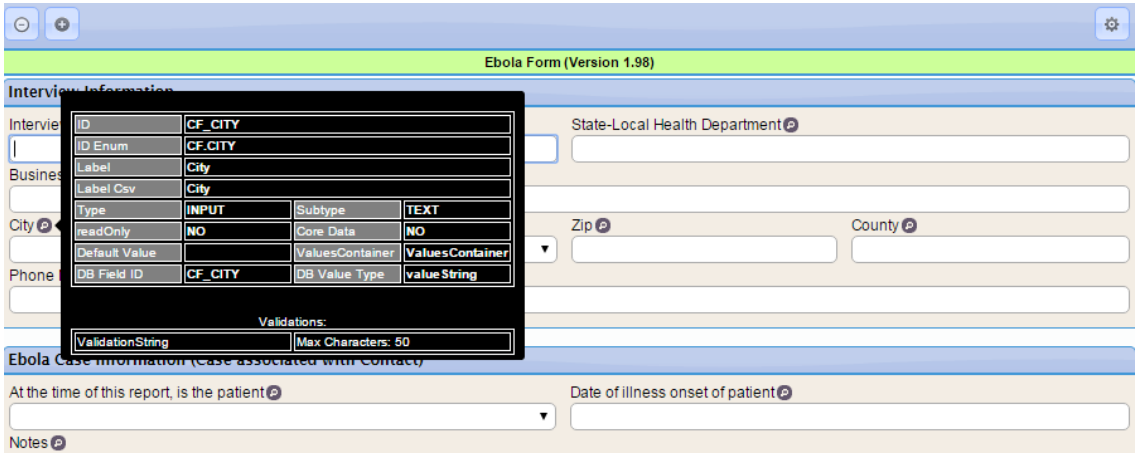
This will show you the form as the user would see it when doing data entry:



If you have the embedded form Debug Privilege, you can put the Form in Debug mode and it will display more details about the Form Elements. To do so, click the top right Form Setting icon and set the Debug mode to Yes.



If you press the shift key while hovering over these icons, it will show you all the information about the field as a tooltip:

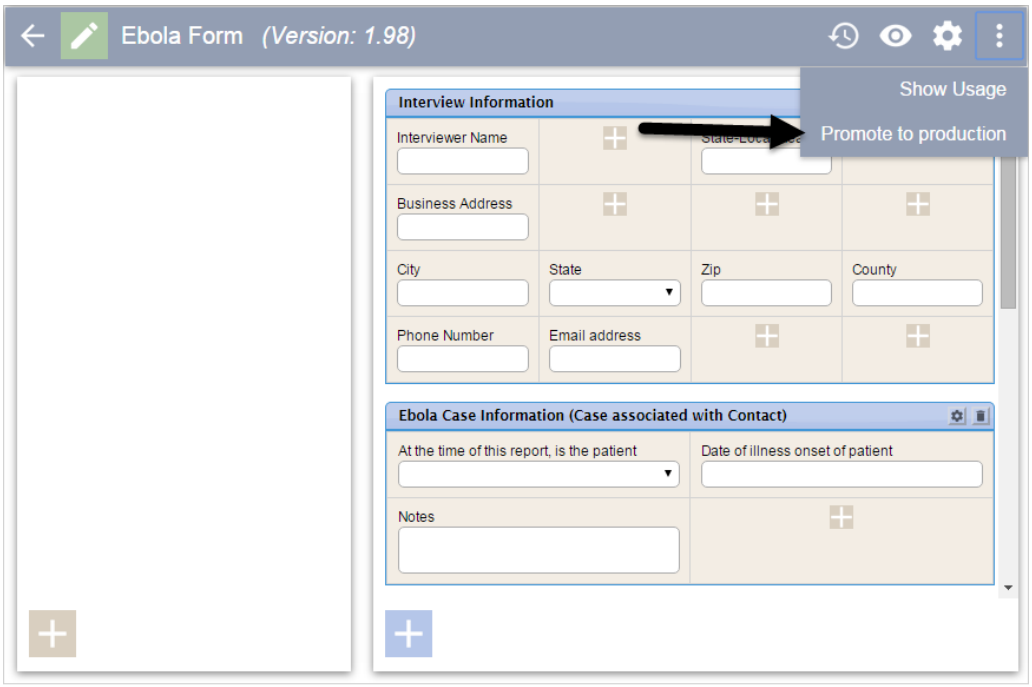


Verify that the Validation is correct and that the Label for the CSV is clear. For example, the Label CSV should say Business Address City.

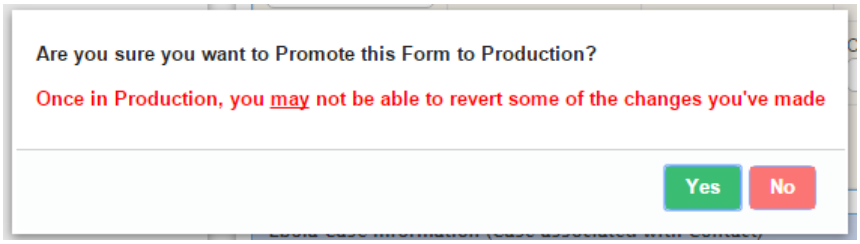
You can also click and the same information will appear:

11.2 Promote to Production

When you are ready to promote your form to production, click the Action Menu and then Promote To Production:



You will be prompted to confirm with the following Dialog box:



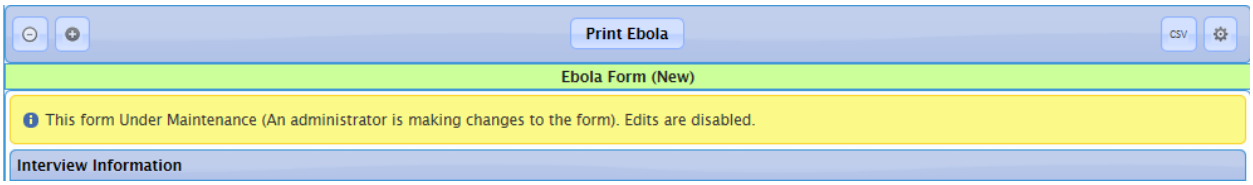
Click Yes and if there are no errors, the following message will appear::

In the examples above, the form version changed from 1.98 to 2.1. Promoting the form to production made version 1 the final version for these first set of changes and version 2 will represent the second set of changes to the form if needed after it has been promoted to production.

11.3 Promotion to Production (Special Scenario)

This section will describe functionality for when a data entry user is currently performing data entry in a Form while you are trying to Promote a new version of the Form to Production.
If you select to promote a form to production while it is being used for data entry, you will receive a warning that the promotion to production was queued until all data entry users have completed using the form.

In addition, if data entry user tries to access this Form form while it is being edited, the following message will be displayed:



When the last user is done with data entry:

- The Form will be promoted to production automatically
- All users will be able to access the Form for Data entry
- An email will be sent to the administrator to notify them that the Form was promoted to production

Note:

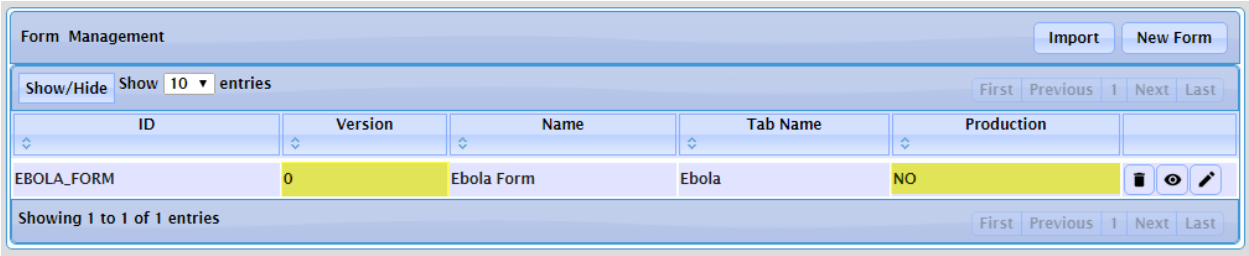
- You can cancel the promotion to production at any time by clicking the Action Menu then Cancel Promote to Production:

- You can view who is currently using this form by clicking Show Usage

11.4 Versioning

Versioning consist of 2 numbers in the following format: X.Y. The “X” is the major version of the form and the “Y” is the minor version that corresponds to a change that you’ve made (i.e., every time you add/modify/delete a Form Element, reorganize Form Elements or add/modify/delete sections this number will increment by one).

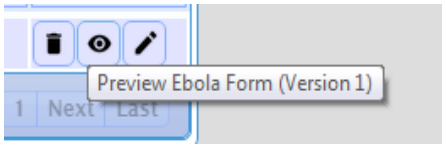
When you create a new form, the Form Management Listing will Display version **0** and the Production field is set to **NO**:



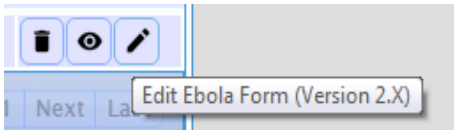
Clicking Edit will edit the next version,Version 1. The following header will appear in the form builder:

Any changes you make will increment that version by 1 (i.e., 1.2 then 1.3, etc.). This also means that when you click edit from the Form Management, you are working on a draft of Version 1.

The tooltips will show information for version 1 of the Ebola Form in the example below:



Preview will show you the production version of the form.



Edit will open the next version of the form for editing. Once a version has been promoted to production, it can no longer be edited. Any edits made will be part of the next version of the form (ie: version 2.X in this example).

12 Editing a Form that was Promoted to Production

Changes can be made to a form after it has been promoted to production.
Edits can include:

- Changing the order of the Form Elements/layouts
- Changing the order of the sections
- Adding Form Elements
- Deleting any newly added Form Elements (unless they are part of an interaction)
- Adding options to a dropdown (When ValueSet is set to Custom)

To retain data already entered in the form when the previous version was in production, certain edit restrictions are in place:

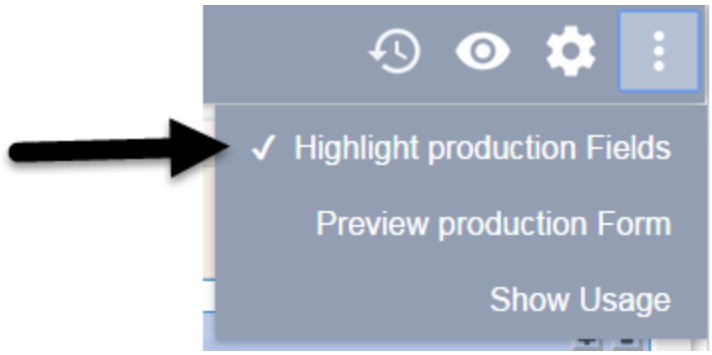
- You will not be able to change certain settings in a Form Element of Type Question:
  - For example, if a text question was limited to 100 characters, you will not be able to change it to 90. You will be able to increase the number as it will not affect data that may already be entered in the question .
- You will not be able to delete:
  - Any questions that were promoted to production
  - Any dropdown or MultiSelect options that were promoted to production

Note:

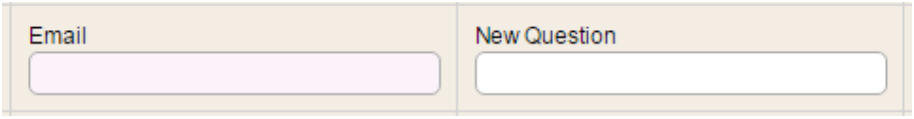
- You will be able to change the data validation in any way you want
- You will be able to change the question interactions (Disable/Enable based on condition) in any way you want

12.1 Highlight production Questions

To help distinguish newly added questions from questions that were used when the form was in production, click the Action Menu and select Highlight production Questions:

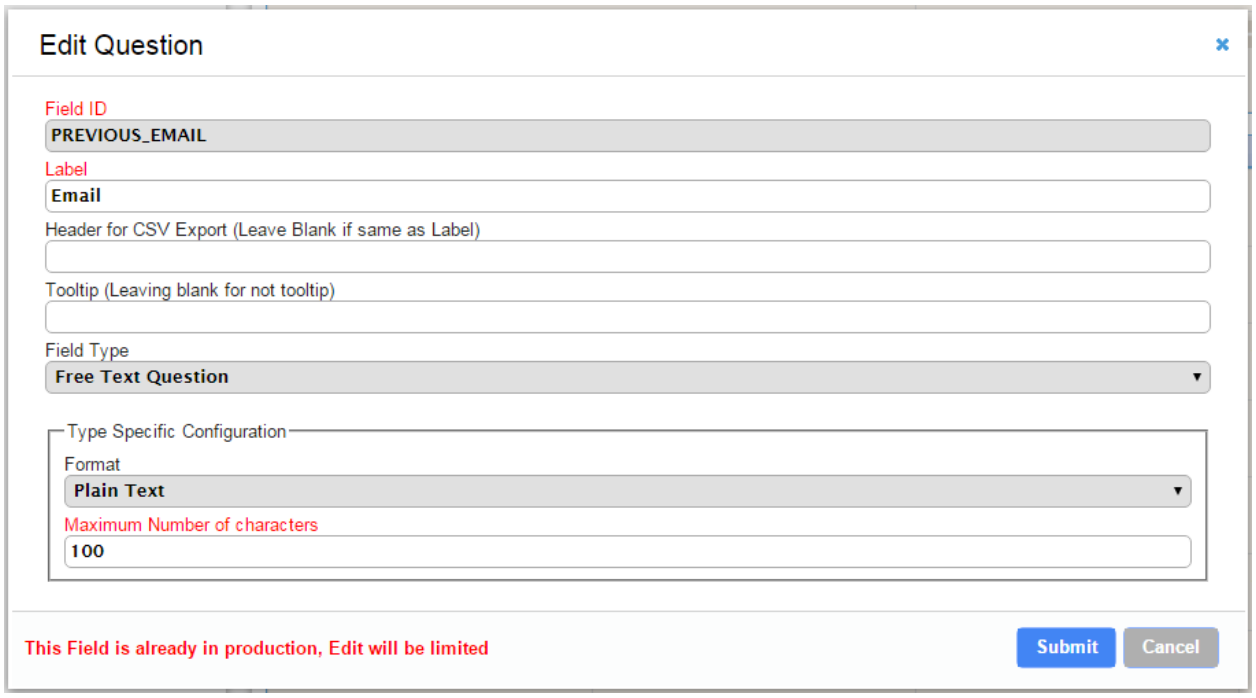


Fields promoted to production will show in pink.



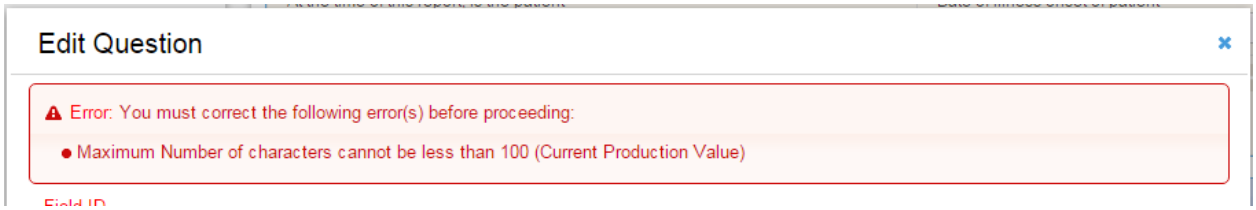
12.2 Editing Existing Free Text Question

When editing a Text question that was promoted to production, a warning in red will appear at the bottom informing you that editing capabilities will be limited:



You can edit the following:

- Label
- Header for CSV
- Tooltip
- For Format Type Plain Text: Maximum Number of characters can only be edited if the new number is higher than what was in production. If you enter a number lower than what was defined for production, the system will not let you change the number and will display an error when submitting.



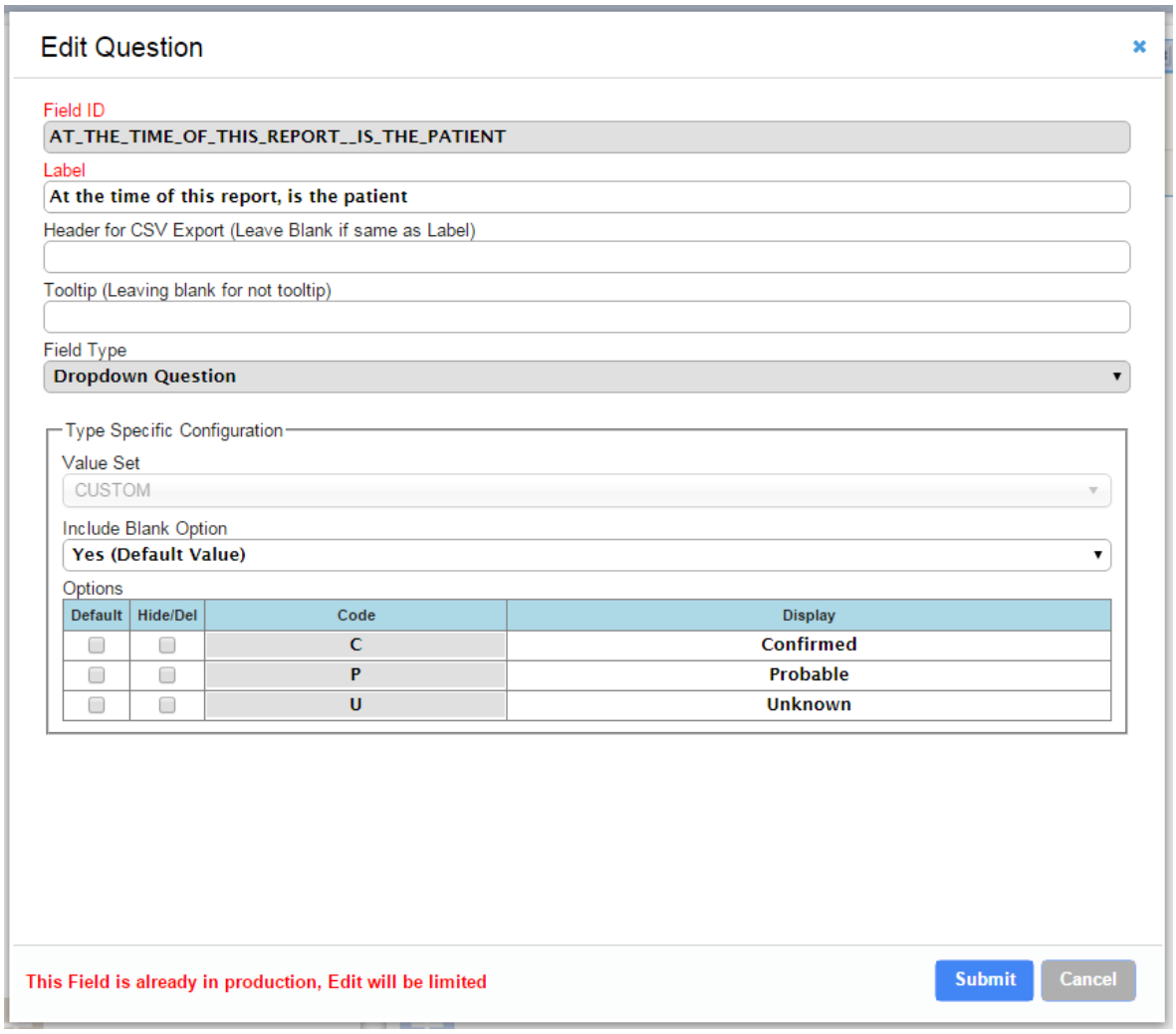
- For Format Type Plain Text (Multilines): Initial Number of Lines:

You cannot edit the following:

- Field Type
- Format

12.3 Editing Existing Dropdown/Multi Select Question

When editing a Dropdown/Multi Select question that was promoted to production, a warning in red will appear at the bottom informing you that editing capabilities will be limited:



You can edit the following:

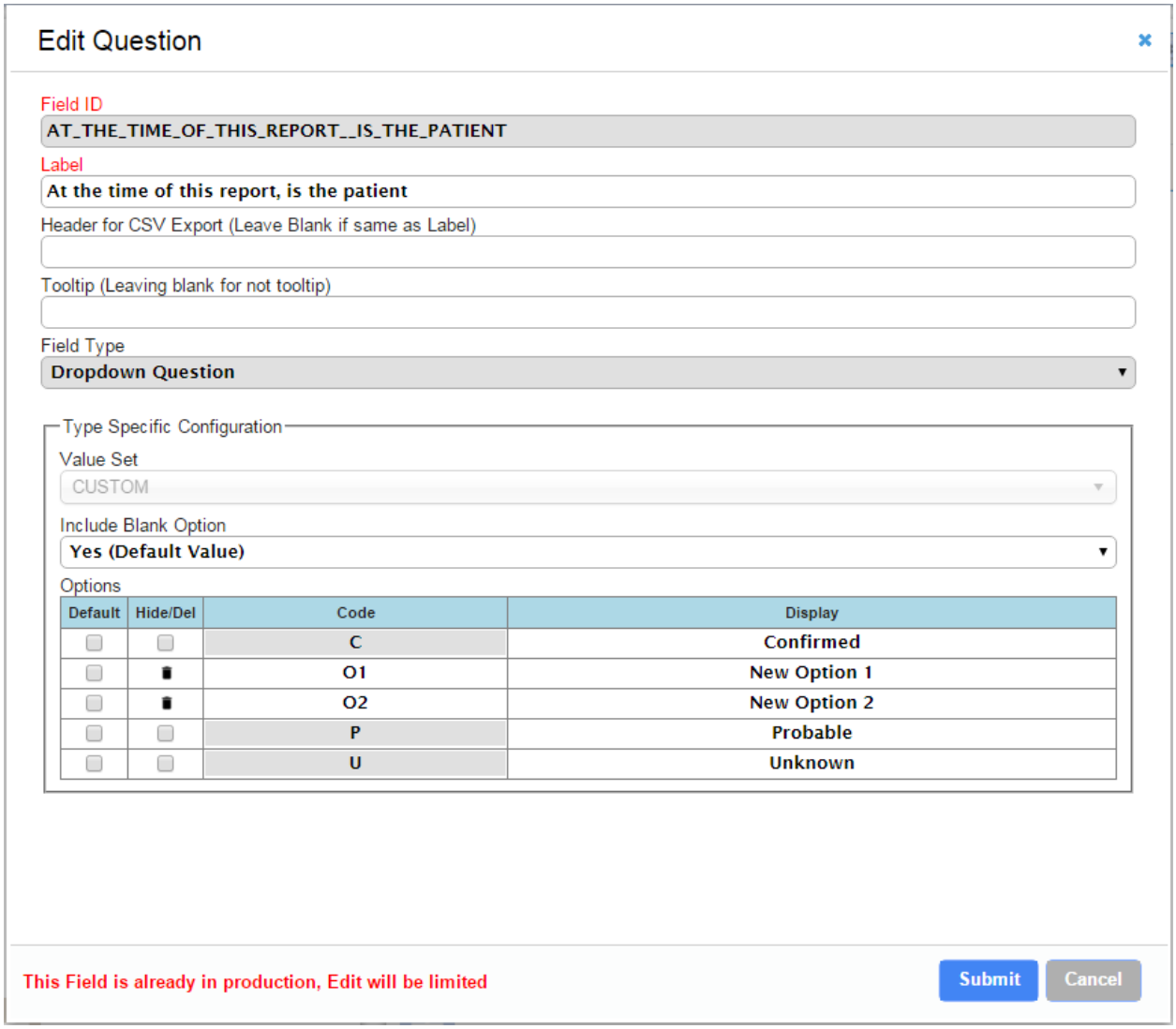
- Label
- Header for CSV
- Tooltip
- Adding new options (for Value Set Custom Only)

You cannot edit the following:

- Field Type
- Delete options promoted to production

Editing options:

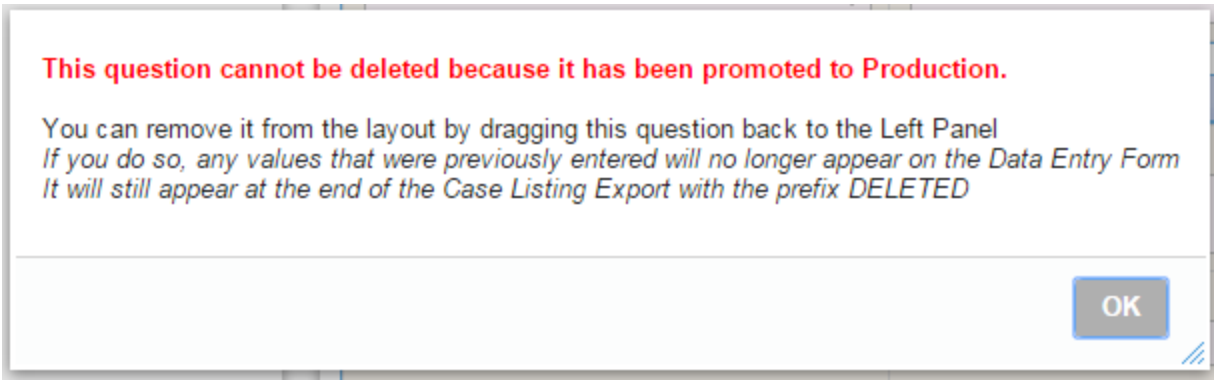
- You will not be able to delete any option that was promoted to production but you can hide them instead. Any form that was completed using that option will still display the option; however, the option will not be available for data entry in the any new versions of the form if the option was not selected. This is the way to delete the option.
- You can change the Display Text of any option (including the ones promoted to production).
- You can add new options. You will not have the same editing limitations for any new options added. (See example below for New Option 1 & 2):



Confirmed/Probable/Unknown are options that were in production so cannot be deleted, but can be hidden from display.

12.4 Deleting a question that was promoted to production

If you try to delete a question that was promoted to production, you will get the following error:



To remove the question from the form, drag it to the left panel. It will no longer show on the data entry form. The question will still be part of the export of the form. Removed questions are placed in the last column of the export.

Note: You can delete Core Data Questions that were promoted to production except for the Form of Type Outbreak Event.

13 Disabling or Deleting a Form

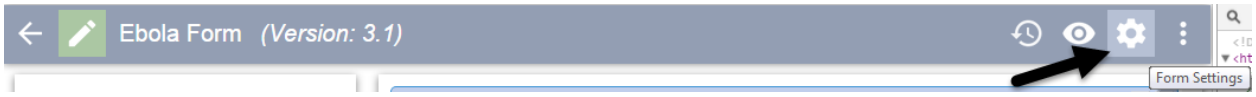
You will not be able to delete a Form when:

- The Form was associated to a disease and data entry users entered data in this form
- The Form is associated with a disease

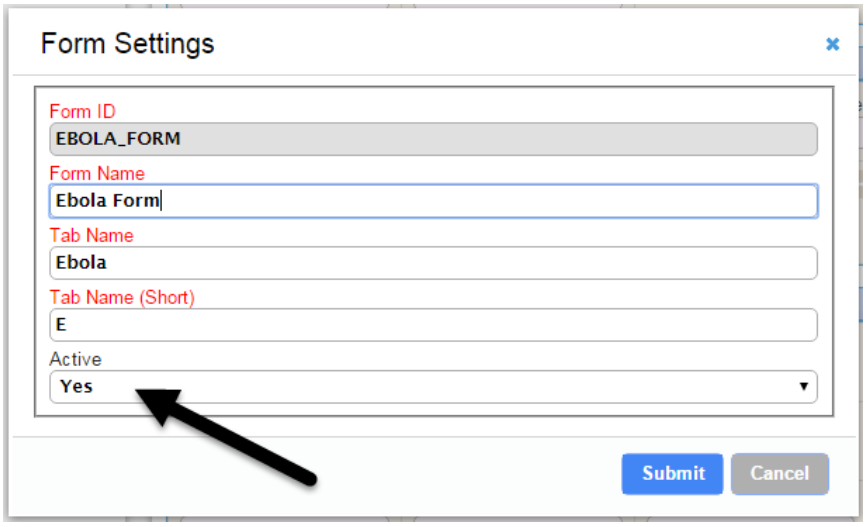
You will be able to delete a Form when:

- The Form was associated to a disease but no data entry user saved data
- The Form was never associated to a disease (even if the Form was promoted to production)

You can inactivate a form if it cannot be deleted. Go to Form Settings:



Set Active to No:



When a Form is marked as inactive:

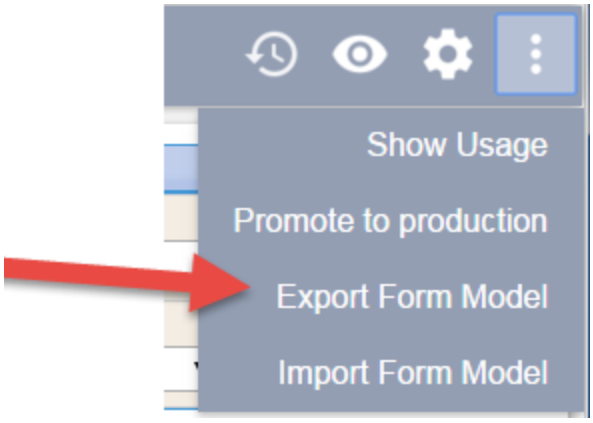
- It is not available to be associated with any disease
- If it is already associated to a disease, it will remain associated until the association has been removed.

14 Exporting/Importing Form Model

14.1 Exporting Form Model

If you have a form you want to export from to reuse on another system (or another Form within the same system):

- Go to the Action Menu
- Select Export Form Model



- The model with then be downloaded on your system.
    - The file Name will be the Form ID and the version
    - The extension is CF
    - Example: EBOLA_FORM.1.36.cf

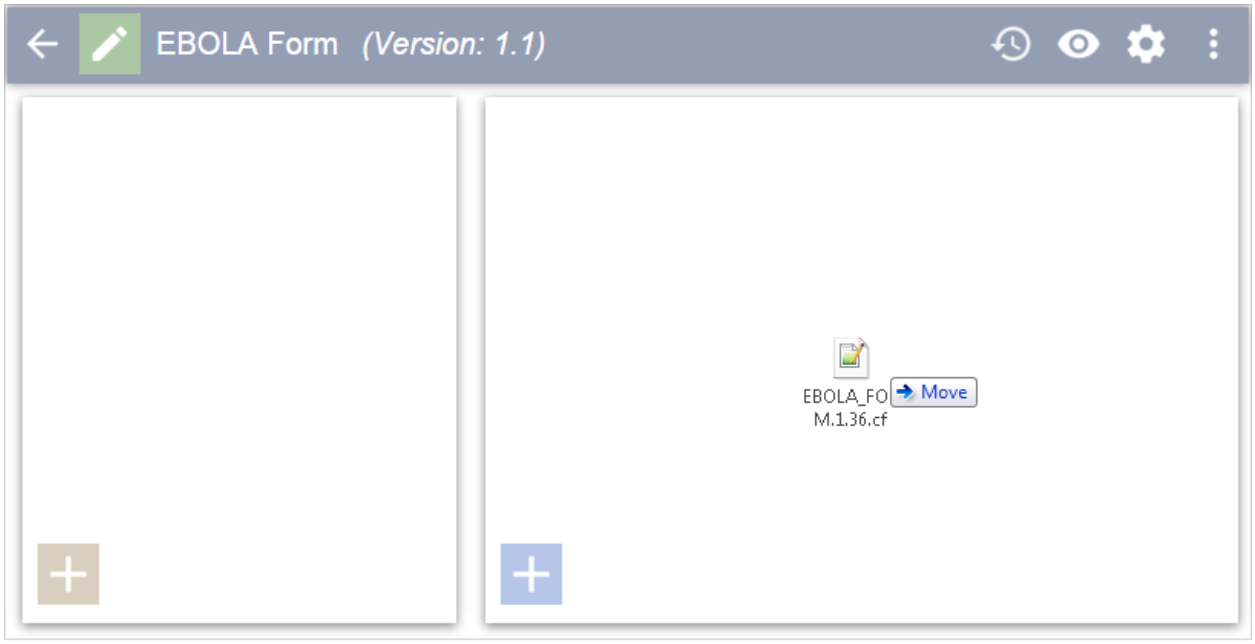
Note: Do not make any edit on this file.

14.2 Importing Form Model

You can import a Form Model on any existing Custom Form (some restriction apply when the form has been promoted to production) or you can create a new empty Custom Form and import a Form Model (this can be used when you want to make a create a Variant of an existing Form.

There are 2 ways to import:

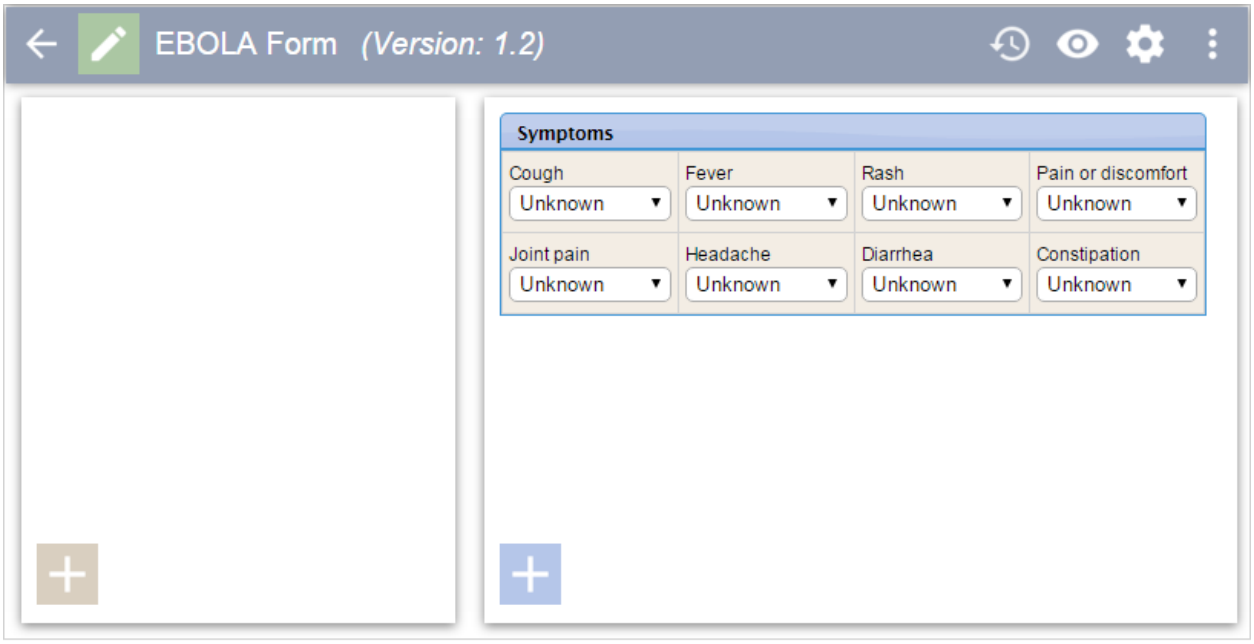
1. Drag and Drop the File to import on the Form Builder for the form you want import:



2. You will be then be prompted with the following:

   a. if you select Append, the imported Form Model will append after the last Section you currently have
   b. if you select Replace, the imported Form Model will replace everything you have.
   c. if you selection Abort, the import will be aborted.

3. if you select Append or Replace, then you will see the imported Model:



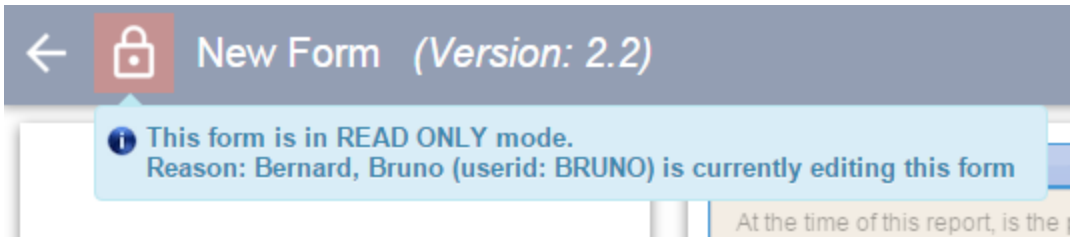
Note:

- If the form was promoted to production, you will not be able to Replace the full Form. Only Append will be available
- If you select Append, the Form Builder will verify that the Form Element ID you are imported are unique and do not conflict with your current Form Element ID

15 Others

15.1 Form Lock for Edit

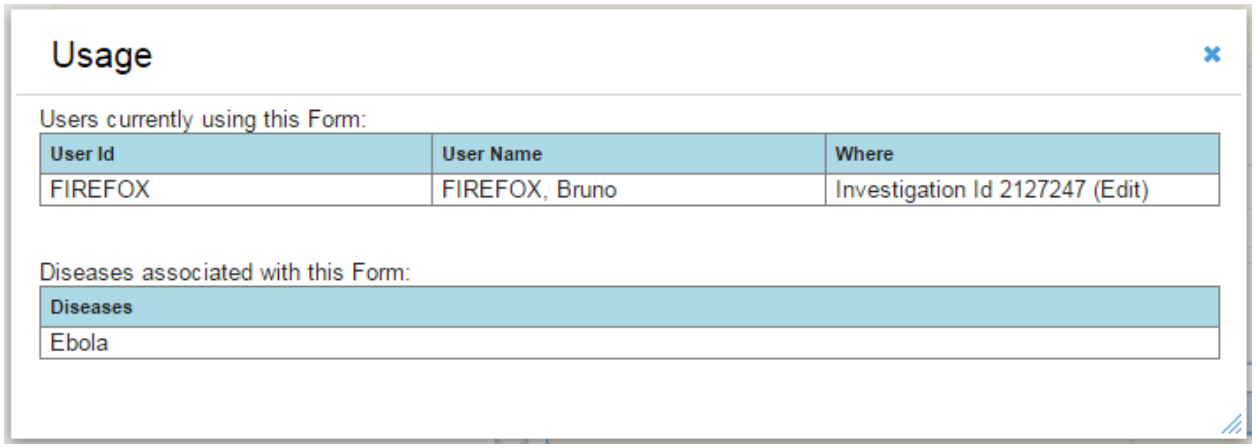
Only one user at a time can edit the same form. If a user attempts to edit a Form currently being edited by another administrator, they will get the following message:



15.2 Usage

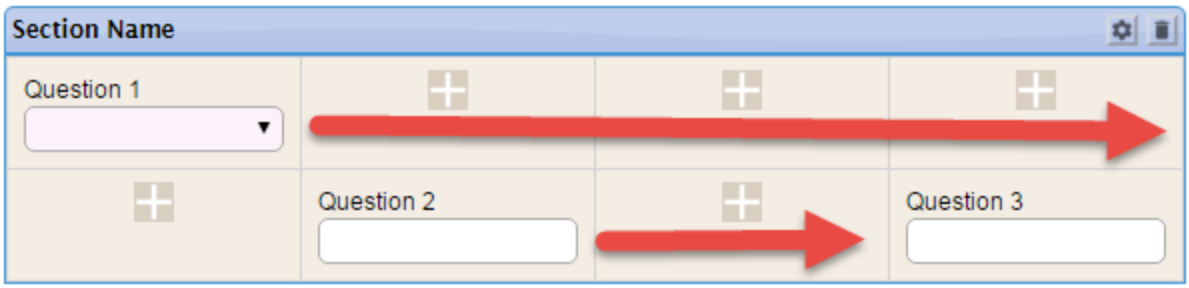
Click the Action Menu and select Show Usage:

A list of data entry users currently using the Form and the name of the diseases the Form are associated with will display:



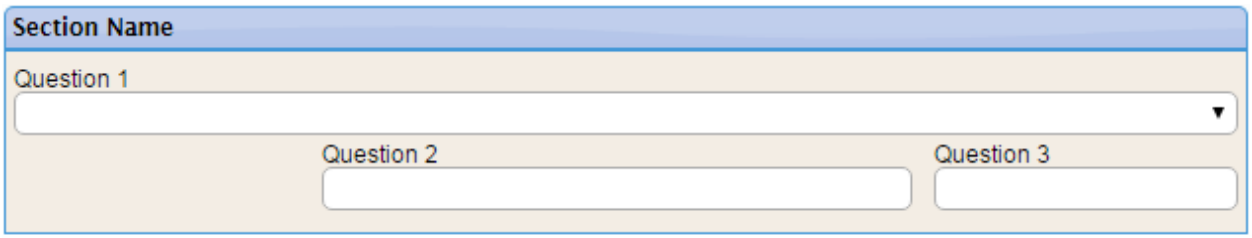
15.3 Cell Spanning (New in Feb 2016 Release)

If some of the table cells following a Form Element are blank, the Form Element will automatically extend across the row to use all the space until it gets to another Form Element or the end of the row:

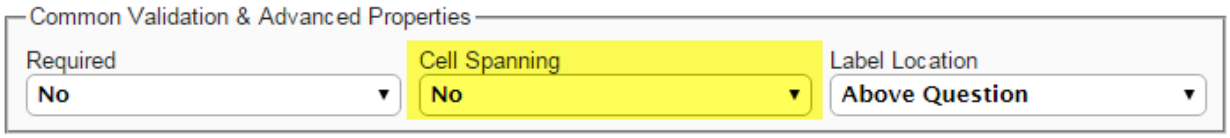


In this example:

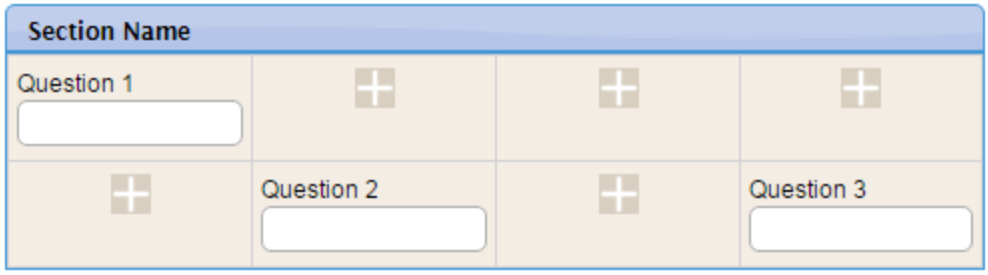
- Question 1 extended until the end of the first row.
- Question 2 extended until the beginning of Question 3.



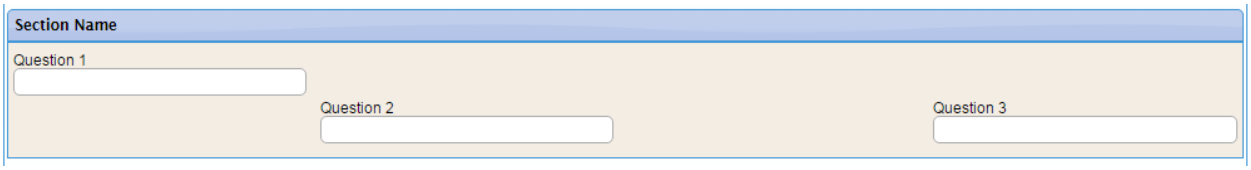
You can disable cell spanning by editing the Form Element and set **Cell Spanning** to **No**:



With Cell Spanning off the following:



Will display like this:

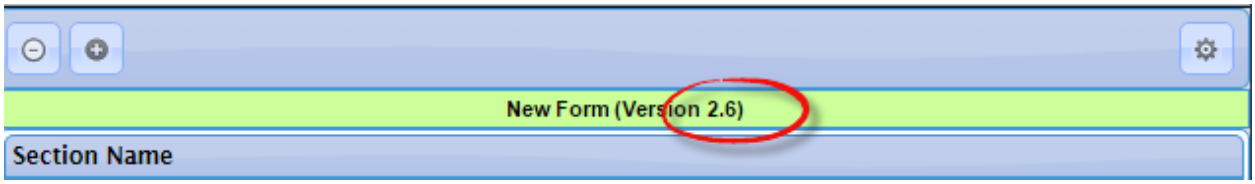


15.4 Different Previews...

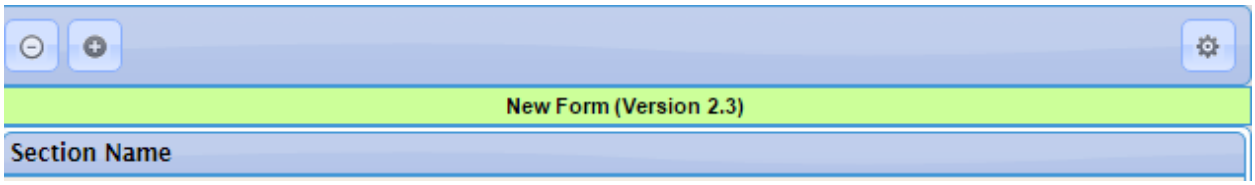
Preview options:

- Preview latest version: Click on the eye icon in the main toolbar to open a preview of the latest version of the form while editing:

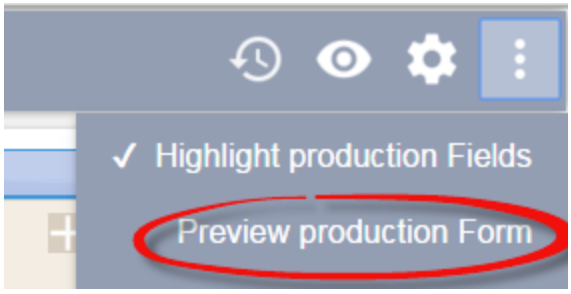
The version number will appear in the preview:



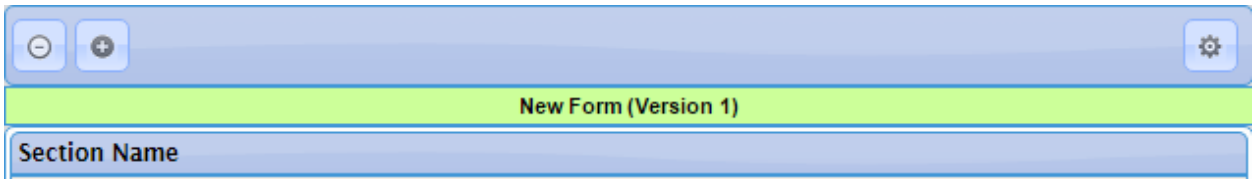
- Preview past versions: Click on History and select the eye icon in one of the rows. This will show the specific version you selected.
The version number will appear in the preview:



- Preview the Production version: Click the action menu and select Preview production Form:



You will see the Form as it is presented to the Data Entry User:



The version number will appear in the preview, but not in the data entry form.

15.5 Left Panel vs Right Panel

As mentioned earlier there are 2 places where you can have Form Elements:

1. Left Panel: Temporary place holder for Form Elements of Type Question.
2. Right Panel: Place where the Form Layout is defined.

How to add Form Element of Type Question to the left Panel:

1. Questions can be added to this panel by clicking on the bottom left beige plus icon.
2. Questions can be dragged from anywhere in the right panel to the Left Panel (drop has to be done on the bottom beige plus left).

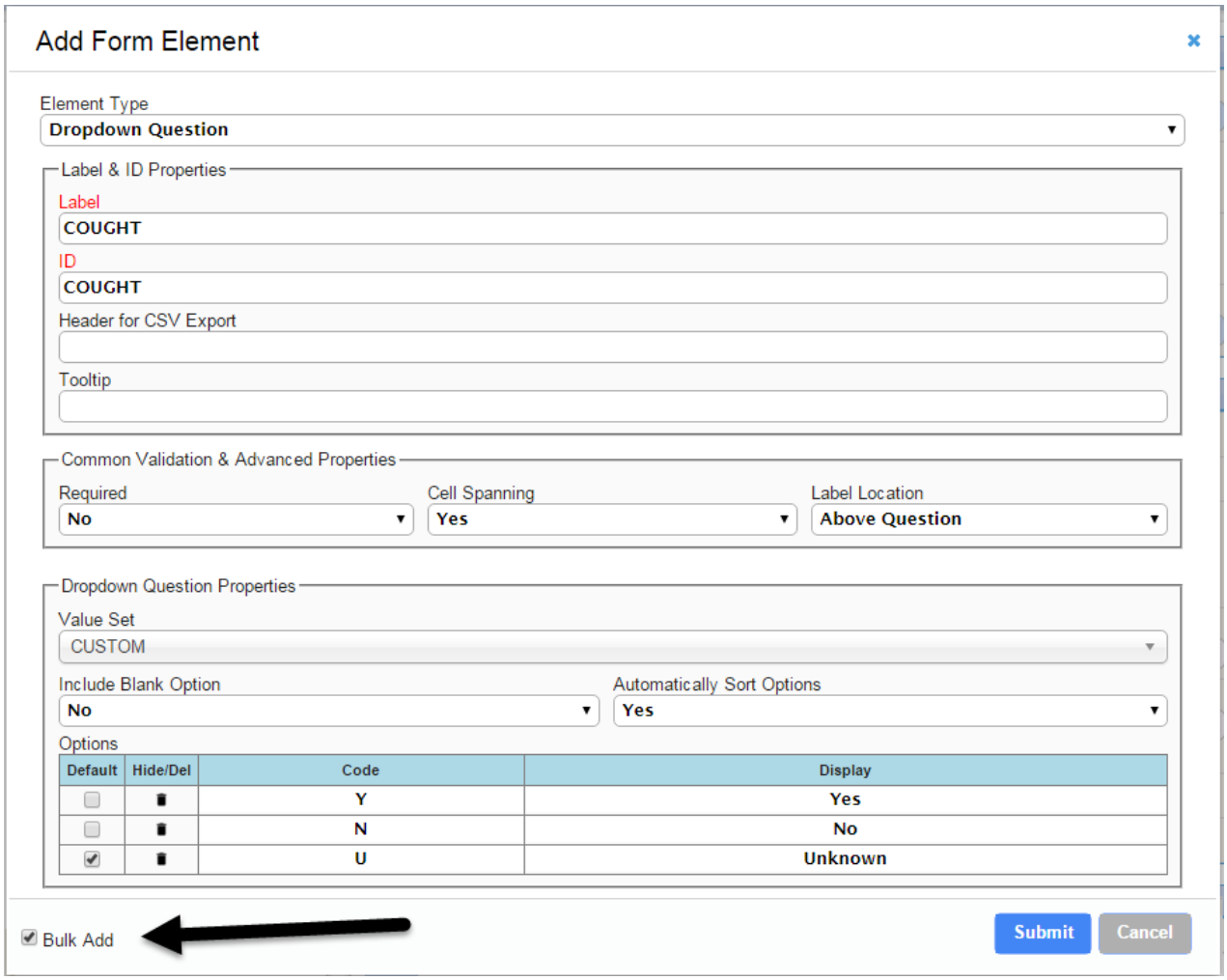
How to add Form Element to the right Panel:

1. Form Elements can be added to this panel by clicking on any beige plus icon within section/table cells.
2. Form Elements can be dragged and dropped from anywhere within the right panel section/table cells.
3. Form Elements can be dragged from anywhere in the left panel to any available section/table cell with the right panel (drop has to be done on the bottom beige plus left)

Note: If Form Element of Type Question cannot be deleted after being promoted to production, leave the question on the left panel. It will no longer appear on the data entry form. It will still be exported at the end of the Supplemental Form (Supp Form) Case Listing Export with the word DELETED pre pended to the CSV Column header.

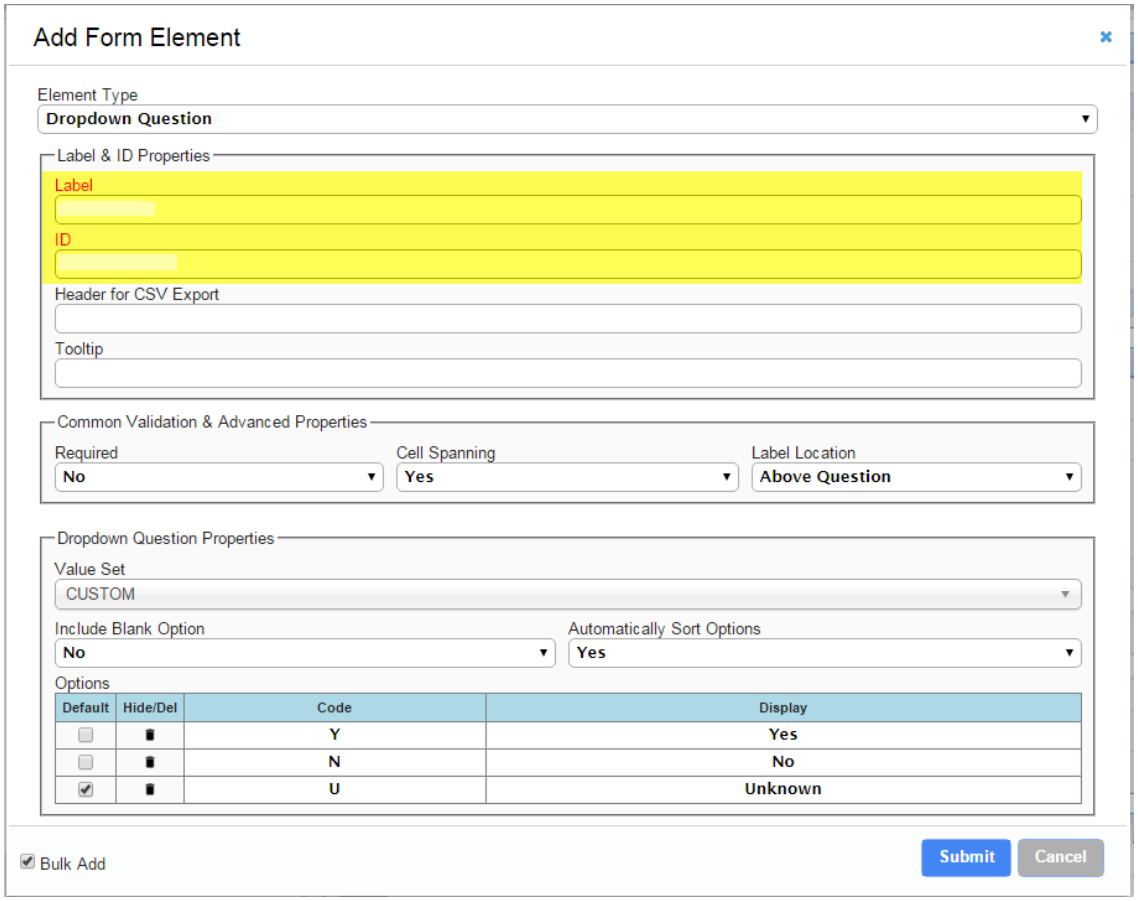
15.6 Bulk Add

"Bulk add" allows you to add multiple questions that have the same options for selection to the form:



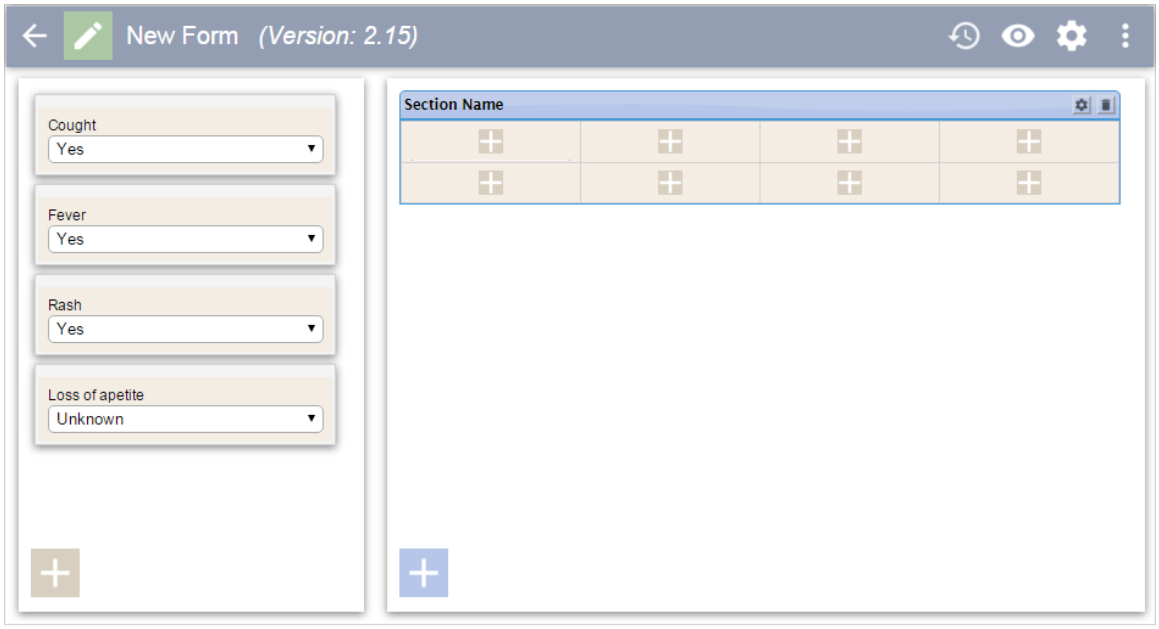
Check Bulk Add and click Submit.

The question will be added to the left panel in the background. The dialog box will remain opened with the same information entered except for Field ID and Label:



Enter a new Question Label and click Submit. This can be done as many times as needed. To finish adding questions in bulk, uncheck Bulk Add before clicking Submit for the last question, or press Cancel at any time.

Questions added in bulk will be available on the left panel and can be dragged to the right panel.



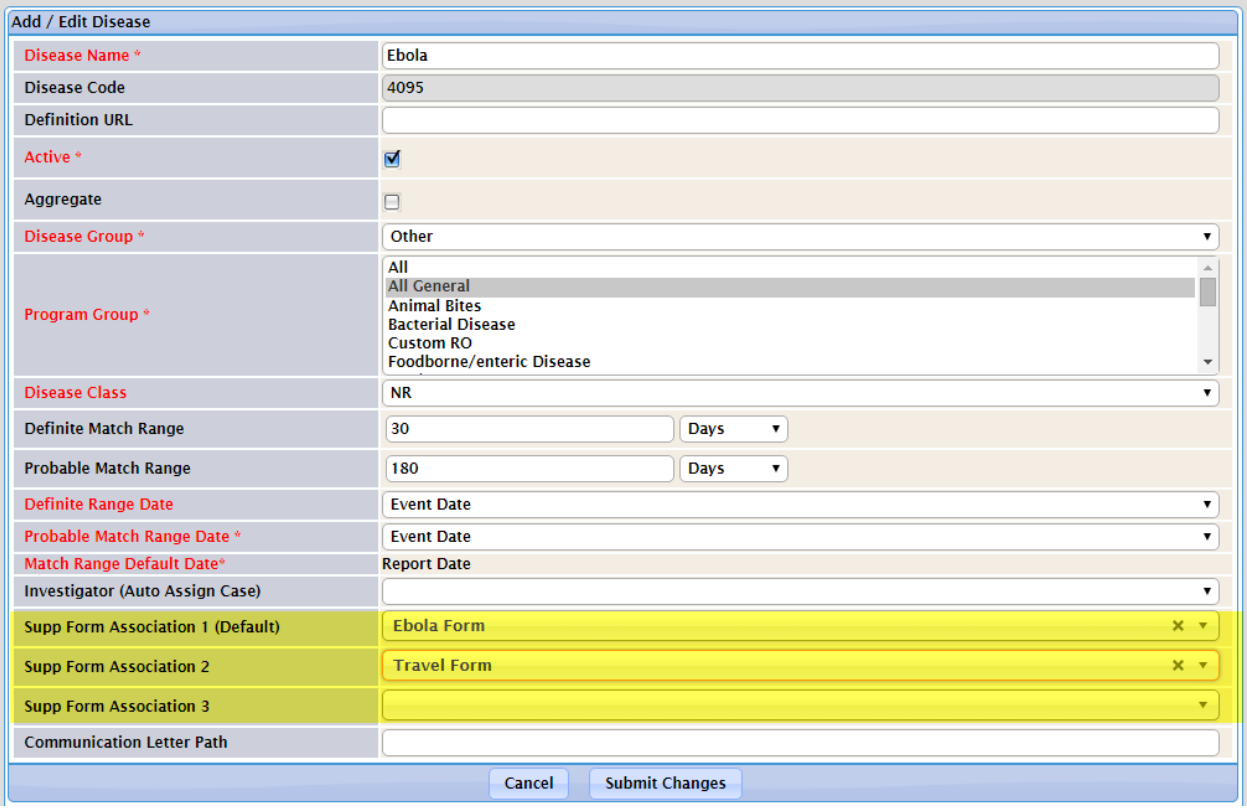
The purpose of this functionality is to save the user time in entering questions with the same drop down options for answers.

This functionality is only available when adding questions from the left panel. This functionality is not available if adding questions within a Section in the right panel.

16 Using Supplemental Forms (Updated in Feb 2016 Release)

16.1 Associate a Supplemental Form to a Disease

You can associate up to 3 supplemental forms to a disease when adding or editing a disease on the disease code management page (Menu: General Configuration/Disease Code Management):

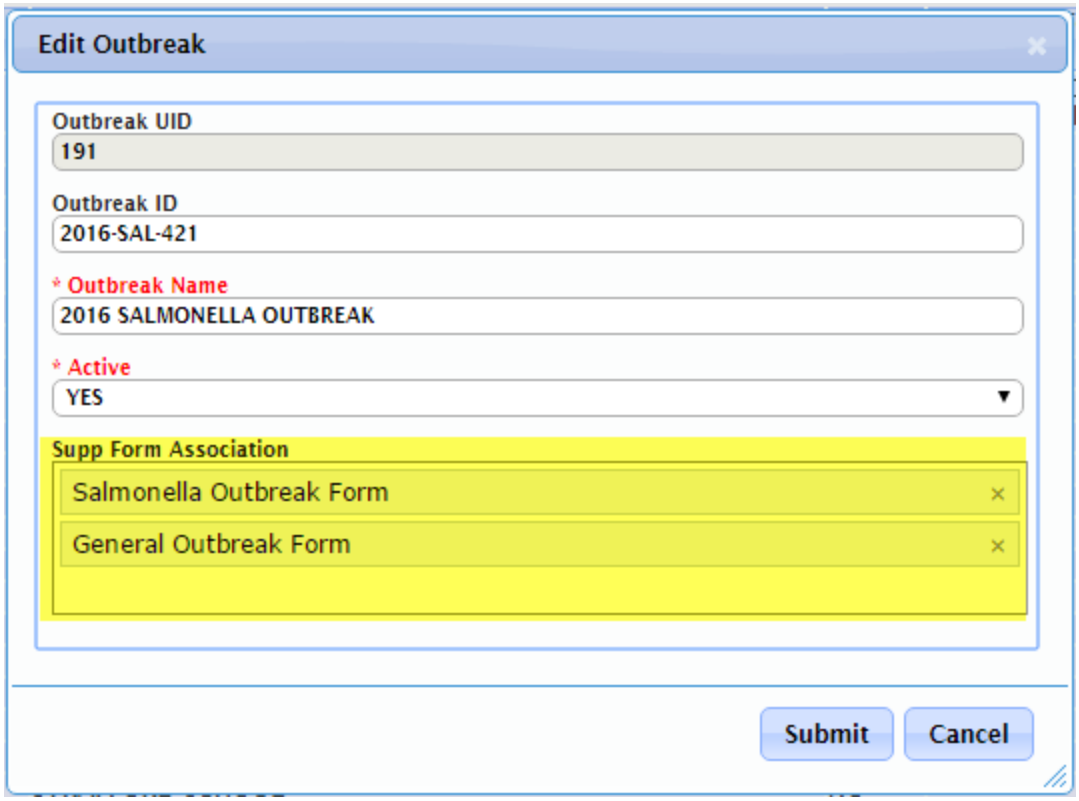


Notes:

1. The same form cannot be associated more than once to the same disease.
2. Some System Supplemental Form are exportable to the CDC thru NETSS and Phin Message. Do not associate more than one of this form to a disease as it may cause problems.
3. Supp Form Association 1 will be the default Form to be displayed for data entry when more than one form is associated.
4. Once a Supp Form is associated to a disease; you will not be able to associate this form with an outbreak.

16.2 Associate Supplemental Form to an Outbreak

You can associate up to 3 supplemental forms an outbreak when adding or editing an outbreak on the Outbreak management page (Menu: General Configuration/Outbreak management):



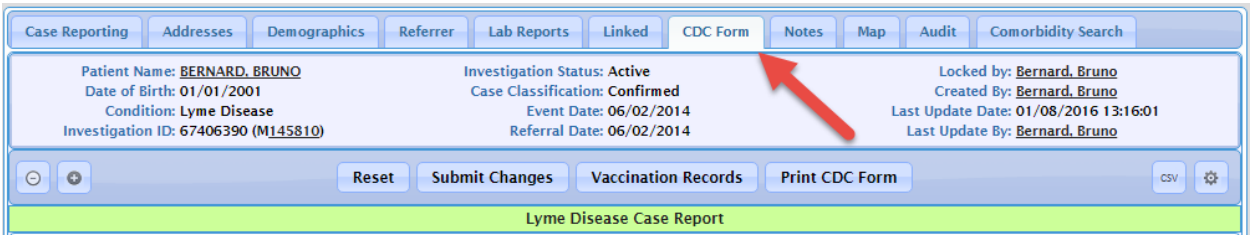
Notes:

1. The same form cannot be associated more than once to the same outbreak.
2. Once a Supp Form is associated to an outbreak; you will not be able to associate this form with a disease.

16.3 Supplemental Data Entry within a Case

16.3.1 Single Supplemental Form Associated to a case

If only one form is associated with a case (disease + outbreak) there will be a tab that will appear between the Linked Tab and the Notes Tab:



The name of the tab will be either:

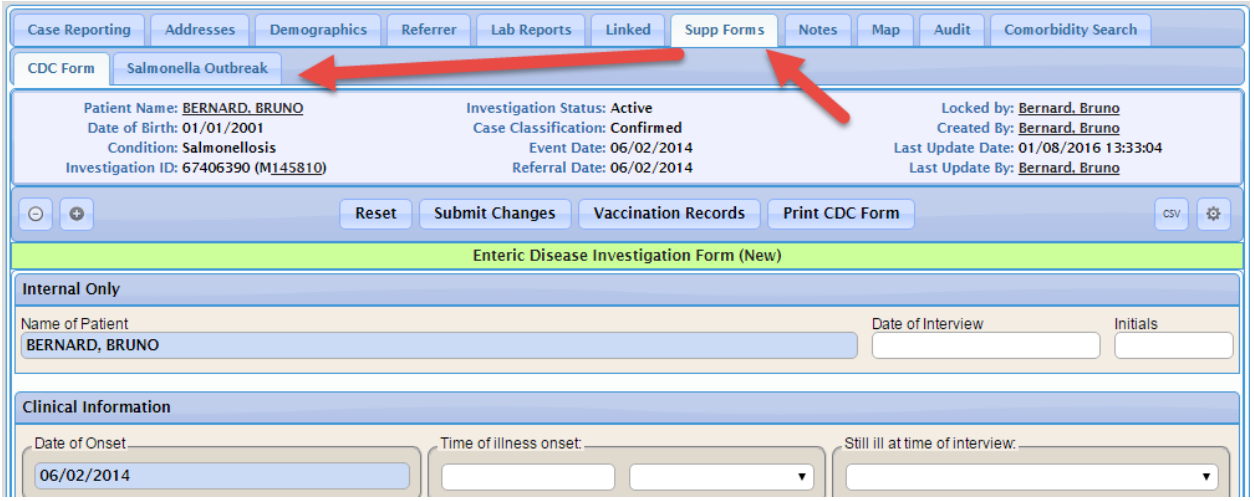
- CDC Form and system CDC Forms.
- The Tab Name that you defined on the form Management.

When you click on the Supplemental Form Tab, you will be able to:

- View the Form
- Edit the Form
- Print the Form

16.3.2 More than one Supplemental Form Associated to a case

If more than one form is associated with a case (disease + outbreak) there will be a tab named Supp Forms that will appear between the Linked Tab and the Notes Tab:



By clicking on Supp Forms, a new row of tab will appear underneath with all the forms associated with this case. This includes:

1. Up to 3 Forms Associated with the condition associated with this case.
2. Up to 3 Forms Associated with the Outbreak Name that is associated with this case on the Case Reporting Tab.

The default form to open is the first form associated with the disease. If there are no disease Supp Form association then it will be the first form associated with the outbreak.

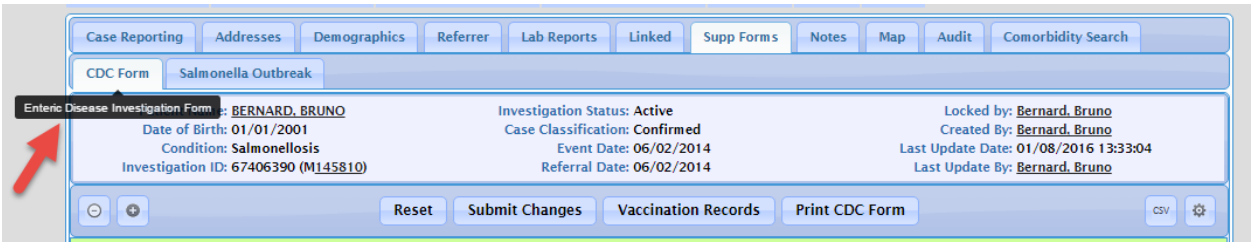
<u>On the second row of tabs each tab name will be either::</u>

- CDC Form and system CDC Forms.
- The Tab Name that you defined on the form Management.

<u>When you click on the Supplemental Form Tab, you will be able to:</u>

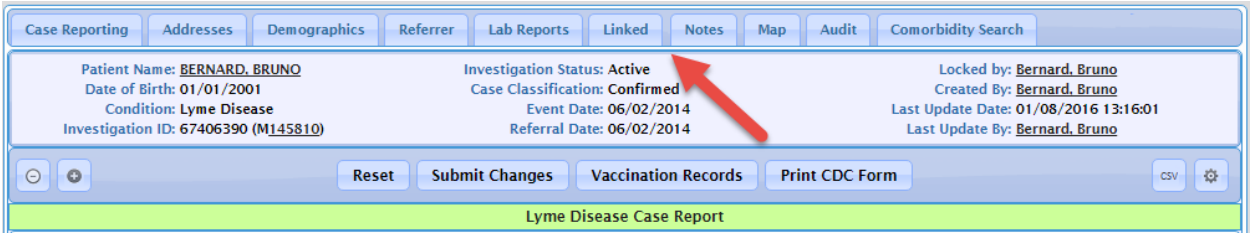
- View the Form
- Edit the Form
- Print the Form

If you go over any tab on the second row, a tooltip will appear with the full name of the form:



16.3.3 No Supplemental Form Associated to a case

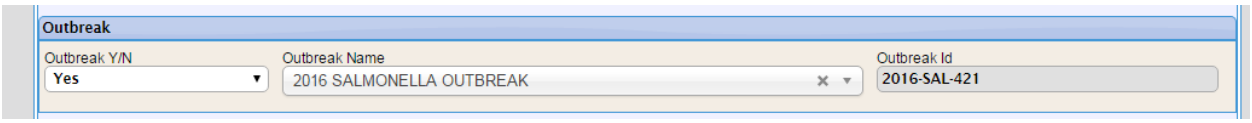
When no Supplemental Form is associated with a case, then there will be no tab in between Notes and Linked:



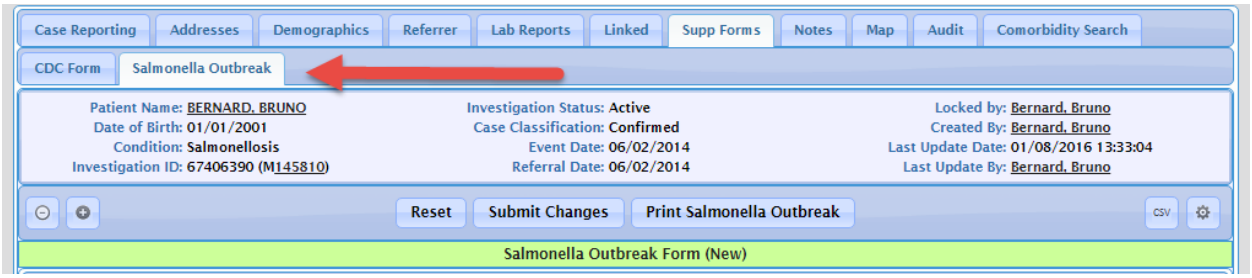
16.4 Outbreak and Supplemental Forms

If you assign an outbreak name that have a Supplemental Form Assigned to it, then the associated form(s) will be available on the Supp Form Tab.

Example:
If we assign 2016 Salmonella Salem to a case:



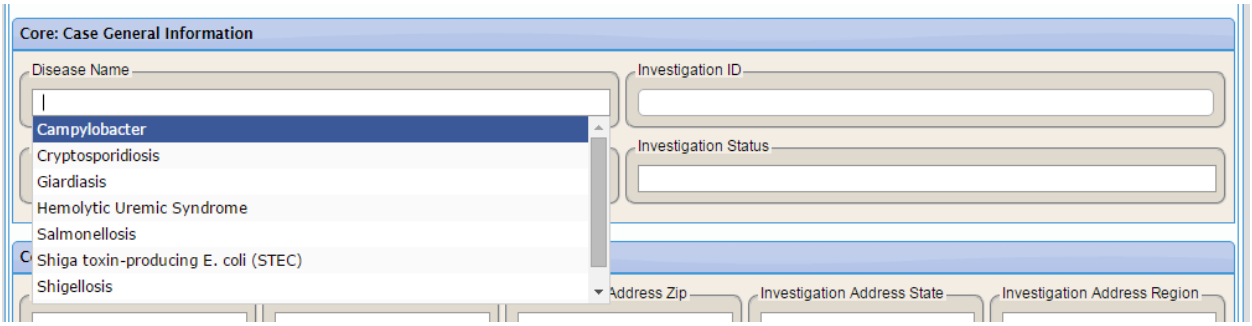
then the Salmonella Outbreak Form will be available:



16.5 Search Cases using a Supplemental Form

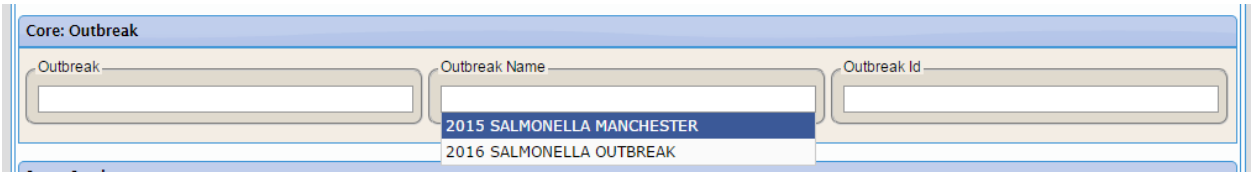
16.5.1 Supp Form Associated with a disease

If you do a Supp Form Search without entering any information on the search page, it will return all the cases where the disease is associated with this Supp Form.
Please note that the Disease Name filter will only include the diseases that are associated with this form. For example the Enteric Form will show the following diseases:



16.5.2 Supp Form Associated with an outbreak

If you do a Supp Form Search without entering any information on the search page, it will return all the cases where the outbreak name selected is associated with this Supp Form.
Please note that the Outbreak Name filter will only include the outbreaks that are associated with this form. For example the Salmonella Outbreak Form will show the following outbreak:

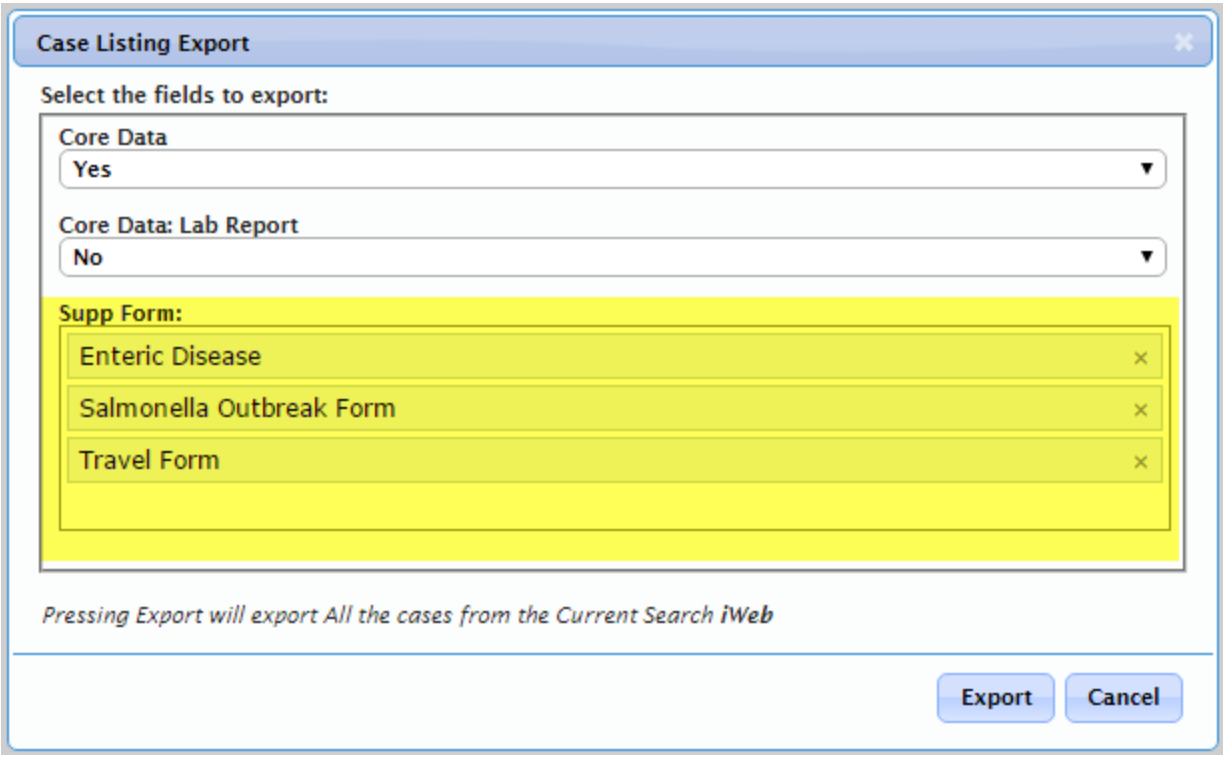


The same thing will apply to Outbreak Id.

16.6 Export Supplemental Form

You can now export an infinite number of forms from the Case Listing Export.

In this example the Enteric Disease, Salmonella Outbreak Form and Travel Form will be included in the export:



The addition columns will be appended at the end of the export in the order the Supp Form appears on the multiselect.

17 Outbreak Event Form (New in May 2016 Release)

17.1 Form Definition

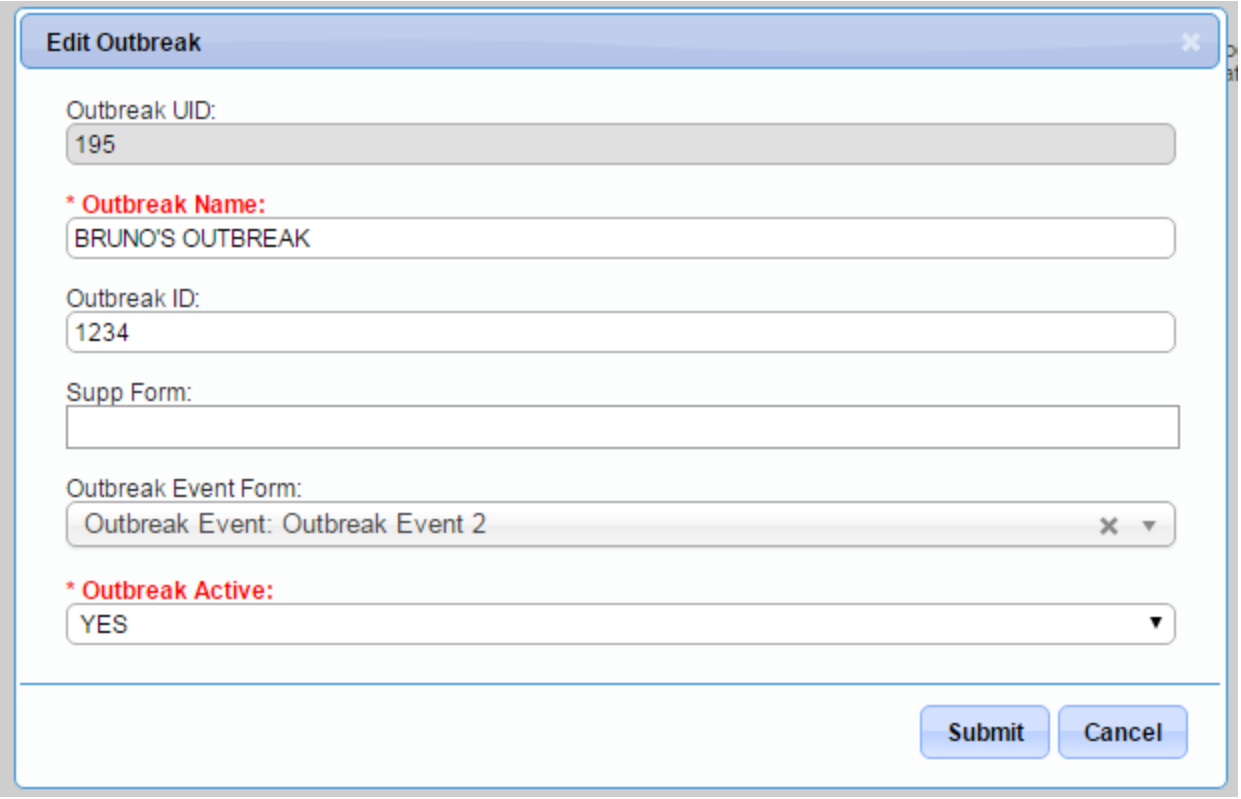
If you want to create a form to be used for Outbreak Event Data entry, you need to create a form of type **Outbreak Event Form**. You will be able to define the form the same way as a **Supplemental Form** except for the following differences:

- Only the following Core Fields can be on the Form:
  - Patient's First Name
  - Patient's Last Name
  - Patient's Middle Name
  - Patient's Date Of Birth
  - Patient's Sex
  - Patient's Race
  - Patient's Ethnicity
  - Patient's Home Phone
  - Patient's Work Phone
  - Investigation Address Street1
  - Investigation Address Street 2
  - Investigation Address State
  - Investigation Address City
  - Investigation Address Zip
  - Investigation Address County
- To be able to promote a form to production the system will enforce the following:
  - Patient's First Name is required to be added in form
  - Patient's Last Name is required to be added in form
  - Patient's First Name needs to marked as required
  - Patient's Last Name needs to marked as required
  - if Investigation Address State or City or Zip or County is present within the form, then Investigation Address State and City and Zip and County are required to be added in the form.
- Once Promoted to production core Data Question cannot be removed but can be moved to the left panel except for:
  - Patient's First Name
  - Patient's Last Name

17.2 Associate Outbreak Event Form to an Outbreak

To associate a **Outbreak Event Form** to an outbreak:

- Go to the Outbreak Management
- Add or Edit and Outbreak
- Select the Form to be used for outbreak event:



Note: There are now 2 type of form you can associated with an outbreak:

- **Supp Form**: Outbreak Form that will appear on the Human Disease Case when the case is assigned to an outbreak. You can select up to 3 Forms
- **Outbreak Event Form**: Outbreak Form what will be used to record outbreak events using the Outbreak Events module.

18 Outbreak Summary Form (New in May 2016 Release)

18.1 Form Definition

If you want to create a form to be used for Outbreak Event Data entry, you need to create a form of type **Outbreak Summary Form**. You will be able to define the form the same way as a **Supplemental Form** except for the following differences:

- Only the following Core Fields can be on the Form:
    - Outbreak Name
    - Outbreak Id
- Once Promoted to production core Data Question cannot be removed but can be moved to the left panel.

18.2 Associate Outbreak Summary Form to an Outbreak

This part will be coming in a future release