

siterra | Knowledge Base Article

Forms & Attributes - Creating New Forms in Siterra

Question:

How do I create a new form in Siterra?

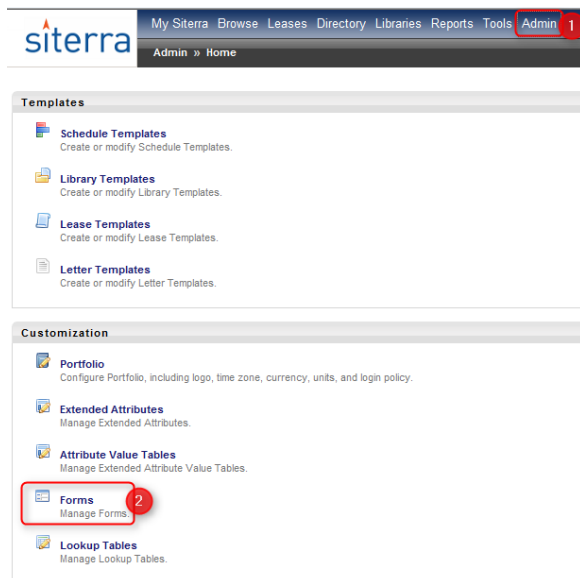
Answer:

In Siterra, Forms are used to store Attributes and associate them to objects. For example, a Core Form for a Site will store and organize the Site Name, Site Number, Site Type, and additional Site Attributes so that they can be associated with a Site Object.

This document will take you through detailed steps for creating a Form. The process includes creating or editing the Form details, adding attributes to the Form, and ways the form can be used on different objects in Siterra. The ability to create or manage Forms requires Administration privileges.

Creating a Form

Forms are created and managed through the Admin section of Siterra. To navigate there select “Admin” (1) from the toolbar, then click “Forms” (2).



The list on the new screen will show all the Forms that exist in a given portfolio. It indicates whether the Form is active, what type it is, and if it is a Default Form.

Note: Forms that are marked “Core” were made upon creation of a Siterra portfolio and are considered standard.

Name	Is Active	Type	Subtype	Is Default	Is Mobile Default	Created	Modified	Core
Core Form	✓	Incident				07/03/2010	07/03/2010	✓
Core Form	✓	Property				07/03/2010	07/03/2010	✓
Core Form	✓	Search Ring				07/03/2010	07/03/2010	✓
Core Form	✓	Project				07/03/2010	07/03/2010	✓
Core Form	✓	Vendor				07/03/2010	07/03/2010	✓
Core Form	✓	Contact				07/03/2010	07/03/2010	✓
Core Form	✓	Users				07/03/2010	07/03/2010	✓

To create a new Form, click the “Add” (3) button above the list, this will bring up a New Form edit section. The following fields will populate

- Name (4): Give the Form a name that will indicate what it will be used for
- Object Type (5): What type of object the form will live on (Site, Lease, etc.) for this example we will be creating a Site/Property Form named “KB Article Form”.
- Active (6): Set to Active if you will be using the Form immediately, inactive Forms will not appear on objects.

When all information has been entered, click the “Submit” (7) button. Your new Form will now appear in the Form list.

Forms Builder

+ Add (3)

New Form (4)

* Name: (4)

Object Type: (5) Leases

Active: (6) Active

Is For Mobile Devices? * Mobile forms are limited to 20 fields. Dependent fields and those using the object browser are not supported.

Show Only on Mobile?

Submit (7) Cancel

Name	Is Active	Type	Subtype
Core Form	✓	Incident	
Core Form	✓	Property	
Core Form	✓	Search Ring	
Core Form	✓	Project	

Completing/Editing the Form

To edit and manage the Form, click the blue and white menu button (8) next to the Form’s name.

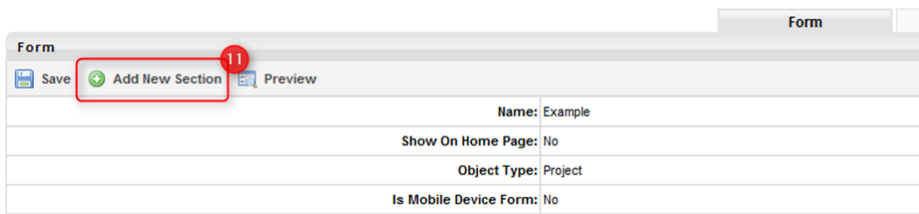
Edit Form Properties (9): Brings up a section where you can rename you Form, change the object type it is associated with, or mark it as “Default”. Default forms will appear on the homepage of the object they

are on, non-default Forms will appear in the “Additional Data” section on the left side of the object homepage.

Form Designer (10): Brings you to a new window where you will add text fields and attributes to your form, clicking on the Form’s name will also take you here.



Select “Form Designer” and a new screen will populate. When Forms are created, they are empty by default. To add text or attributes to your Form, click the “Add New Section” (11) button.



This will create a new, blank section. The “Name” field (12) will populate “New Section” upon creation, but you can give it any name desired. All new forms will start with one column (area where text or attributes are stored). You can add additional rows and columns using the “Add Row” or “Add Column” buttons (13). Select “Add Text” (14) to add text to the Form, it will be displayed but cannot be edited on the object. Text can be used as a label, organizational use, or informational field. Using the “Add Field” (15) button allows you add attributes to your Form.

To add an attribute, click the “Add Field” button to bring up a new area to fill out. The following areas are now available:

- Object Type (16): select the type associated with whichever attribute you will be adding to this form.
- Attribute (17): select the attribute from the list of standard and extended attributes. The list will only display attributes that are of the type you selected in the dropdown prior to this step
- Label (18): Auto populates with the name of the attribute, but can be modified.
- Description (19): This can be entered to describe the attribute, it will be displayed when you mouse-over this section of the form once it is on an object.
- Default Value (20): This will be populated if the attribute has a default value defined. It cannot be edited at the form level.

Once all desired sections have been populated with text or fields, click the “OK” button (21) at the bottom of the section. Then save the form. Once the Form has been saved, you can preview it also.

New Section

Cancel Edit | Add Row | Add Column | Delete Section

Name: New Section Active? Dependent?

Header:

Add Field | Add Text

Delete Column

Footer:

Object Type: Please Select-- Active? Dependent?
 Attribute* Show Label? Dependency cannot be enabled on unsaved fields.
 Label* Required?
 Description: Read Only?

Default Value: The Default Value cannot be enabled on unsaved fields.
 Style: Sample text

OK Cancel

View your Form on an object homepage.

Once you have completed the form and it is marked active, it is ready for use. Navigate to a homepage of an object to which you associated the Form (Site/Property, Lease, etc.). Find the Form in the Additional Data section or on the homepage if you marked it as default. Clicking the Form name brings up a new window where you can enter data into any attribute. Forms that appear on object homepages can be edited by clicking the “Edit” button at the top of the homepage.