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# formedit

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# Form Editor

***txConnect Admin > Administrator Options > Settings > Forms Management > Forms (then click spyglass icon )***

This page allows you to change settings for a selected form, such as adding the fields to the form, assigning a “friendly” name, and determining the order in which the fields are displayed. This page can only be accessed by selecting a form from the Form Management page.

## Edit a form:

1. From the Forms Management page, select Forms from the menu. The Form Management page is displayed.
2. Under **Available Forms**, click under **Options** for the form you want to manage.

Below are instructions for **New Student Enrollment Forms** and **All Other Dynamic Forms**, as well as **Static Forms** (scroll down). Standard forms cannot be edited.

### New Student Enrollment Forms

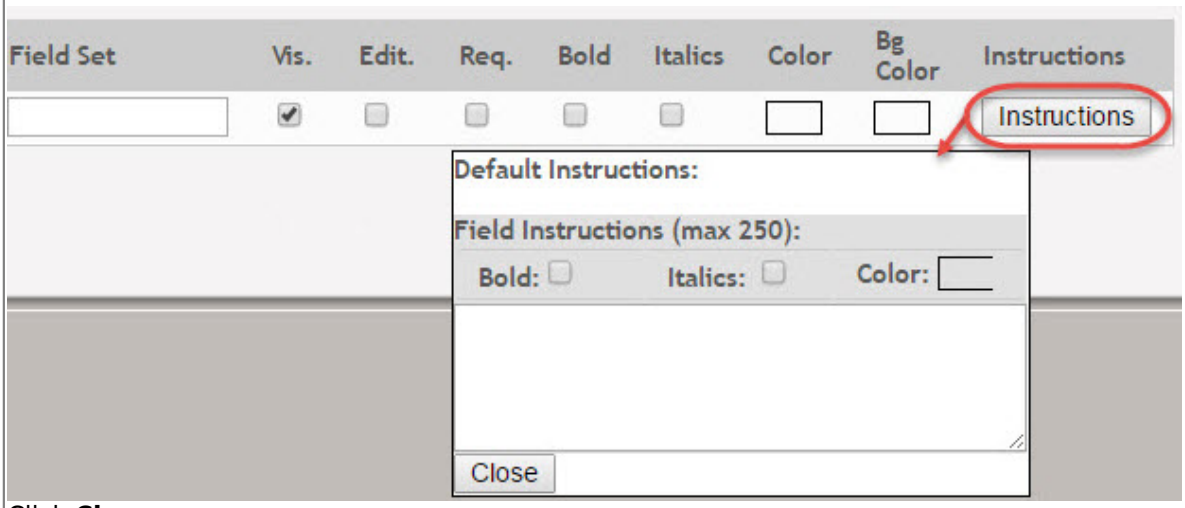
*New Student* forms are dynamic forms. Several *New Student* forms are included automatically and already have columns (i.e., fields) added. These forms cannot be deleted or renamed; however, you can modify some of the default settings for each form column.

The **Name**, **Campus**, **Editable**, and **Visible** fields display the default information and cannot be changed. These forms cannot be archived.

| | |
|---|---|
| **Current Language Context** | Select the language of the form you are editing. |
| **Special Instructions or information for this form** | Type any specific instructions for the form, up to 2000 characters, in the selected language. |

You cannot add columns to the form; the **Add** button is disabled. However, you can modify the following settings for existing columns:

| | |
|---|---|
| **Friendly Name** | The default friendly name is displayed. If you selected *Spanish* for **Current Language Context**, the default friendly names are Spanish. Modify the name as needed, up to 50 characters.<br>The name should be typed in the language selected in **Current Language Context**. If a Spanish name is not provided, the English name will be displayed even if the parent is viewing txConnect in Spanish. |
| **Order** | Indicate the order in which you want the fields to be displayed on the form. For example, type 1 if you want to field to be displayed at the top of the form. |

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| **Field Set** | Use this column to group related fields together in the form. For example, you could type "Mailing Address" for all fields that are related to the student's mailing address.<br><br>The fields that you want to physically group together should also be together as indicated by the **Order** field. The fields with the same **Field Set** are grouped together in a box, but only if they are adjacent in the order. The box is drawn around one or more sequential fields that have a **Field Set** specified.<br>The field set should be typed in the language selected in **Current Language Context**. If a Spanish field set name is not provided, the English field set name will be displayed even if the parent is viewing txConnect in Spanish. |
| **Vis** | Select if you want the field to be visible to parents on the form. Clear the check box if you do not want the field visible to parents. For example, you can hide the four-digit zip code extension. The setting of this field overrides all other visibility settings. |
| **Edit** | Select to allow parents to update data in this field from the form.<br><br>• If selected, the form field will be editable, but only if the field is also set to **Updateable**=*true* on the Form Field Management page.<br><br>• If *not* selected, this will override the other setting, and the form field will not be editable.<br><br>• This setting does not apply to *New Student* forms. |
| **Req** | Select if the field is required of the parents. If this field is selected, be sure **Edit** is also selected. |
| **Instructions** | Click the button to view any existing default instructions and add additional instructions for the field. A pop-up window opens.<br><br><br>Click **Close**. |

Click **Save**.

Click **< Forms** to return to the Form Management page.

## All Other Dynamic Forms:

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| **Current Language Context** | Select the language of the form you are editing. |

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|---|---|
| **Name** | The form name is displayed as entered in the previous step. Modify the field if necessary.<br><br>The name should be typed in the language selected in **Current Language Context**. If a Spanish name is not provided, the English name will be displayed even if the parent is viewing txConnect in Spanish. |
| **Campus** | The campus is displayed as entered in the previous step. Modify the field if necessary.<br><br>• Select a campus if the form is specific to one campus.<br><br>• Select *None - District* if the form is for all campuses in the district. |
| **Editable** | • *Yes* - The fields on the form will be editable.<br><br>• *No* - The fields on the form will not be editable. |
| **Visible** | The setting entered on the previous page is displayed, indicating if the form is visible to parents in txConnect. Modify the setting if necessary. |
| **Archived** | • *Yes* - Archive the form, which allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.<br><br>• *No* - Do not archive the form.<br><br>Archived forms are *not* visible to parents in txConnect.<br><br>New Student Enrollment forms cannot be archived. |
| **Special Instructions or information for this form** | The text box displays any text entered on the previous page. Modify the text if necessary, up to 2000 characters. |
| **Form Fields** | |

Click **Save**.

If you created a form with fields from a vertical table, some required additional fields may be added automatically. If so, a message is displayed prompting you to review the fields before saving.

Note the added fields. These fields cannot be removed; the delete icon is not displayed.

Click **Save** again.

Click **< Forms** to return to the Form Management page.

## Static Forms

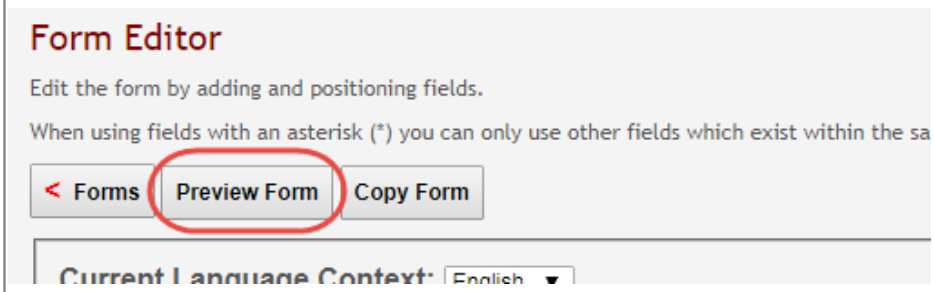
| | |
|---|---|
| **Current Language Context** | Select the language of the form you are editing. |

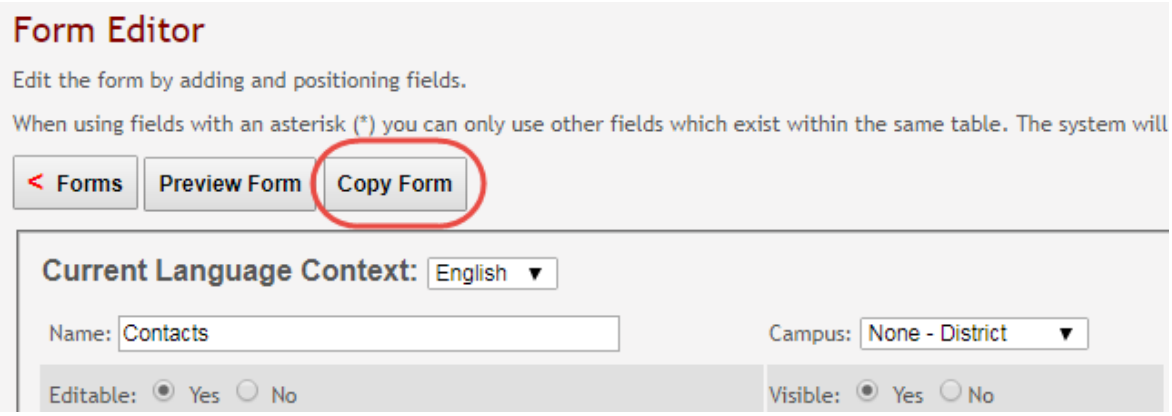
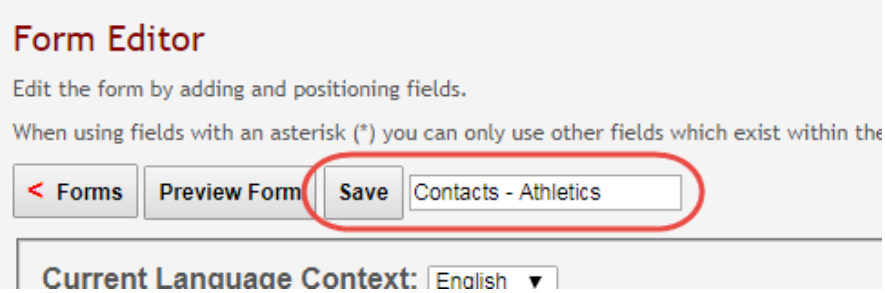
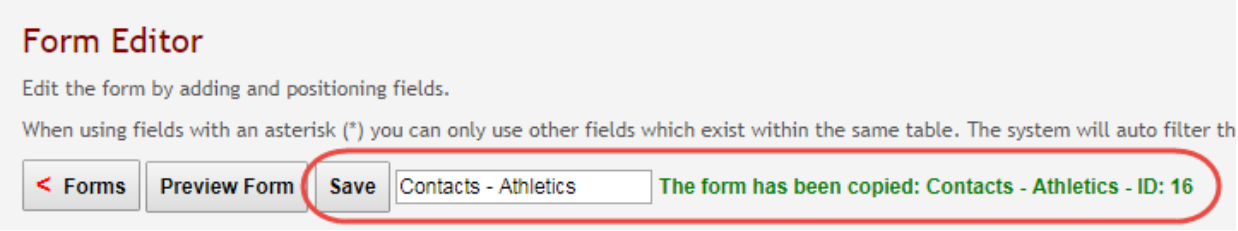
| | |
|---|---|
| **Name** | The form name is displayed as entered in the previous step. Modify the field if necessary. |
| **Campus** | The campus is displayed as entered in the previous step. Modify the field if necessary.<br><br>• Select a campus if the form is specific to one campus.<br><br>• Select *None - District* if the form is for all campuses in the district. |
| **Static document selection** | The drop-down lists all available static forms. Select the static form to associate with this form. |
| **Visible** | The setting entered on the previous page is displayed, indicating if the form is visible to parents in txConnect. Modify the setting if necessary. |
| **Archived** | • *Yes* - Archive the form, which allows you to retain forms that may still be needed for reporting purposes but are no longer used for data collection. An archived form is still accessible to administrators, but is grouped with other archived forms for organizational purposes.<br><br>• *No* - Do not archive the form.<br><br>Archived forms are *not* visible to parents in txConnect.<br><br>New Student Enrollment forms cannot be archived. |
| **Special Instructions or information for this form** | The text box displays any text entered on the previous page. Modify the text if necessary, up to 2000 characters. |

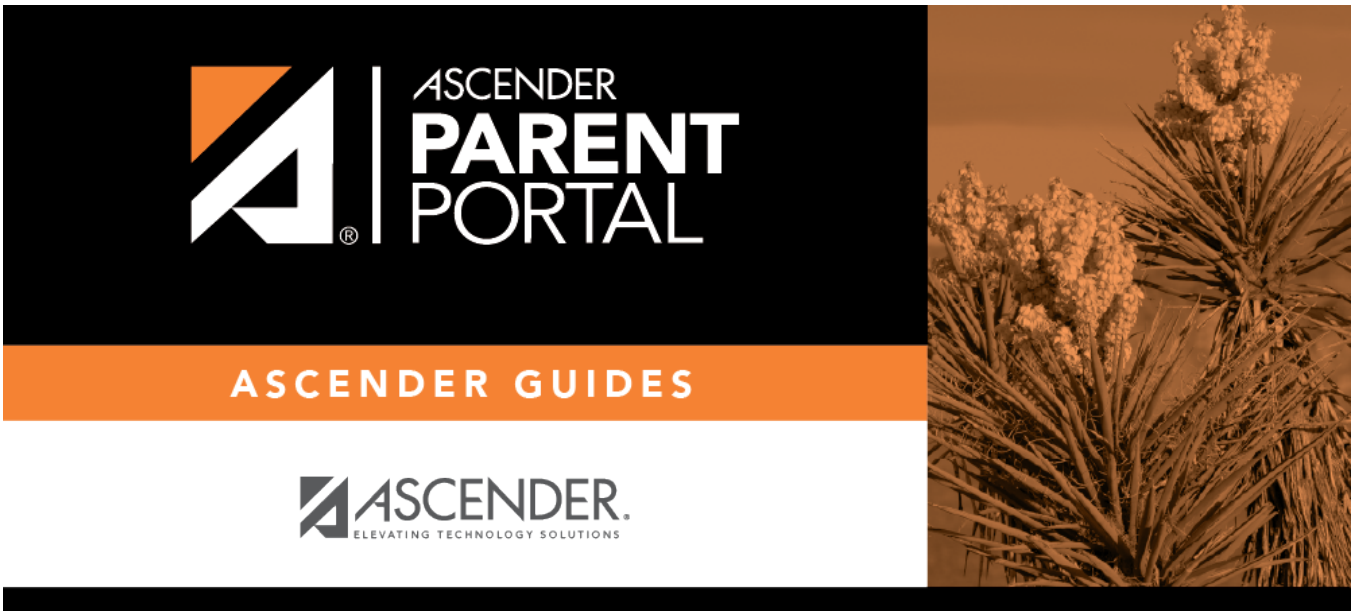
Click **Save**.

Click **< Forms** to return to the Form Management page.

# Preview or copy a form:

| | |
|---|---|
| **Preview** | Click to view the saved changes to the form.<br><br>• Only static and dynamic forms can be previewed. *New Student Enrollment* forms cannot be previewed.<br><br>• In the preview window, data cannot be edited or saved.<br><br><br><br><br>The form opens in a pop-up window or different tab allowing you to view the form as it will be displayed to parents in txConnect. |

| | |
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| **Copy Form (as New)** | Click to create a new form that is an exact duplicate of the form you are copying.<br><br>• Only static and dynamic forms can be copied.<br><br>• Only saved changes are copied to the new form; unsaved changes are not copied.<br><br><br><br>A text box is displayed allowing you to type a name for the new form. The new form name cannot already be in use by another form, and it must be three or more characters.<br><br><br><br>Click **Save**.<br><br><br><br>The new form is now displayed on the Forms Management page and can be modified as needed. |


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