

How to ... Create Forms

Notes: Forms can be used to collate and share information. They can be designed to collect information relating to children, parents and employees.

1. Make a New Form

Select **Form Settings**

Select **Add Form...** to make a New Form.

2. Form Details

Type in a name for your form, for example Meal Form.

Select who the form is related to; who it is to be completed by and who can view the form.

Note – you need to have the Parent Passport active to allow parents to complete and view forms online.

3. Adding Questions

Select **Add New Question** to add questions (limited to 30 characters).

4. Question Detail

Select the type of information you want to record for the question from the drop-down box

If you choose **Selection (Single)** or **Selection (Multi)** complete Step 5. If not, continue to Step 6.

5. Customising Questions

When you are using one of the selection options, there are a number of pre-defined options, or you can create your own using text or images.

Type

Yes/No

Pre-defined

Yes/No

3 Faces

8 Faces

User Defined


User Defined Text

User Defined Images

To create your own:
Select User Defined Text and add type in your first option

Add Option

All

Click  to save and add more options.

6. Required Questions

Check if the question is required to be answered every time the form is completed.

7. Repeating Questions

You may want the question to be part of a *repeating section*.
For example, in a meal form, you may want a repeating section for each meal, rather than completing an individual form for every mealtime.

Give the repeating section a heading.
You can add further questions later.


Repeat Group Name

Meal information

Repeat the same 'Repeat Group Name' in every question that you want to be part of the repeating section.

8. Revisiting Questions

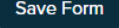
Questions you have created are listed on the left.

Questions in yellow  indicates *Required Question*




indicates question is part of a *Repeating Section*

9. Viewing your Form

Select  Confirm your save in the pop-up window.

Select the Forms Tab to view and print your Form.

You will see any repeated sections marked with  to add or remove additional sections.