



# Folders and Forms

## Module 2 – Folders and Forms

Version 1.0

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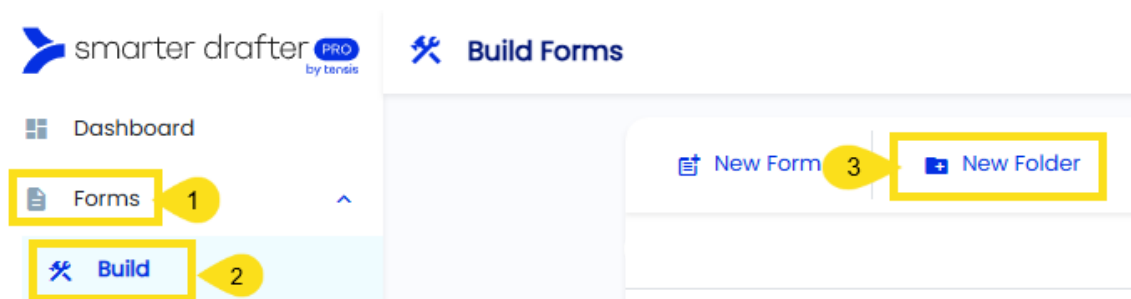
## 1. Folders

### 1.1 What is a Folder?

A folder houses a group of forms. To keep the library of forms organised, a folder structure can be built to categorise and subcategorise them. Managing the library will require the creation, deletion and relocation of folders and forms, and this guide will assist you with the required steps.

### 1.2 Create a new Folder/Subfolder

To create a new folder/subfolder, click **Forms**, then **Build**, then **New Folder**.



The New Folder pop-up will open.

Give the new folder a name according to your organisation's naming convention guidelines.

If you are creating a subfolder, click on the parent folder drop-down and select the relevant folder to create the new subfolder. If a parent folder isn't selected, the new folder will be created as a parent.

**Add New Folder** ×

**Name** \*

**Parent folder**

Select a folder

▼

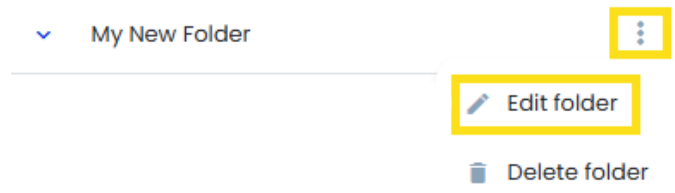
**Additional options** ▼

Cancel

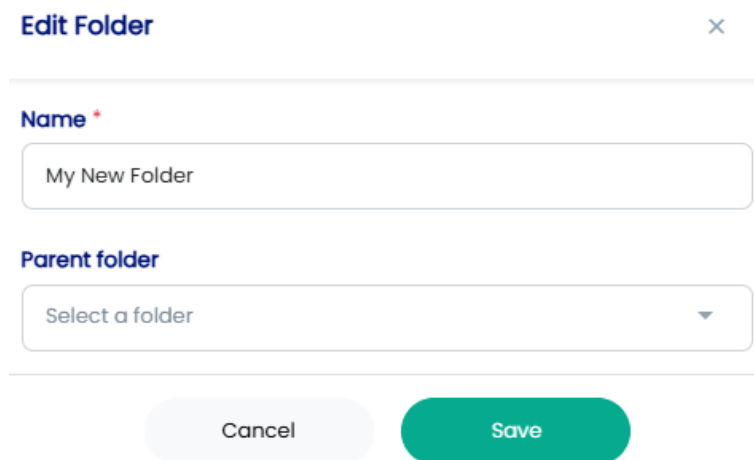
Save

## 1.3 Rename a Folder

To rename a folder, locate the folder and click on the 3 dot ellipsis and then click **Edit Folder**:



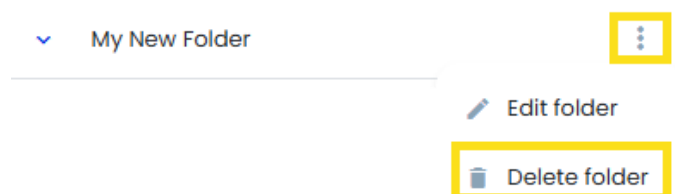
The Edit Folder pop-up will open, where you can rename the folder and adjust the folder/subfolder location.

A screenshot of the 'Edit Folder' pop-up form. The form has a title bar with 'Edit Folder' and a close button (X). Below the title bar, there is a 'Name' field with a red asterisk, containing the text 'My New Folder'. Below that is a 'Parent folder' dropdown menu with the text 'Select a folder' and a downward arrow. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

## 1.4 Delete a Folder

A folder must be empty before it can be deleted. Deleting a folder won't be permitted if there are any forms within the folder.

To delete a folder, locate the folder and click on the 3 dot ellipsis, and then click **Delete Folder**:



## 2. Forms

### 2.1 What is a Form?

A form is a questionnaire to capture data. Each form is customised to extract the information required for the automation process and has powerful tools to assist in handling variations and conditional components of documents.

### 2.2 Form Library

Forms are saved in the Folder structure that your organisation has developed. The folders assist in providing categories to group related Forms.

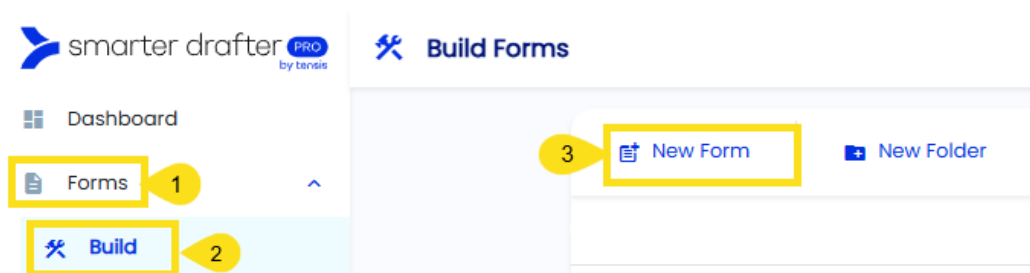
### 2.3 Form Structure

A form is built by assembling **sections** and **fields**.

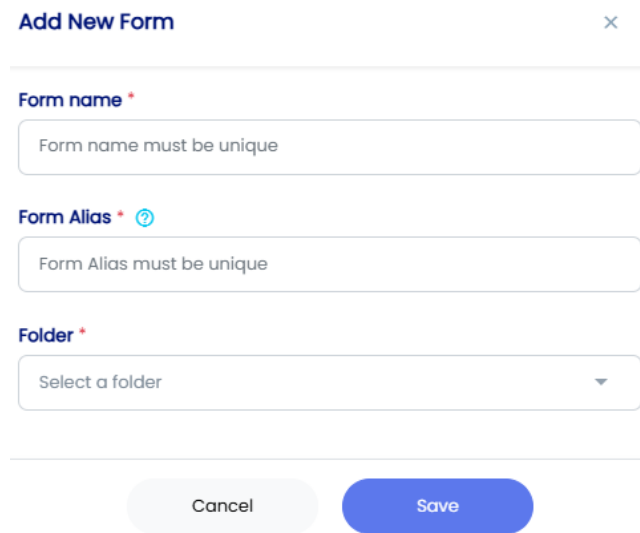
A section is used to group related fields under a heading. There are many types of fields which are designed to handle different types of data and provide specific functionality. A form usually has several sections, and each section usually contains several fields.

### 2.4 Create a new Form

To create a new form, click **Forms**, then **Build**, then **New Form**.



The New Form pop-up will open.



**Add New Form** ×

**Form name \***

Form name must be unique

**Form Alias \*** ⓘ

Form Alias must be unique

**Folder \***

Select a folder ▼

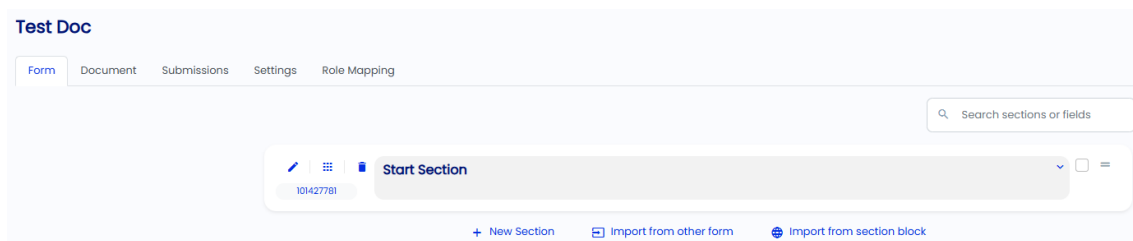
Cancel Save

Give the new form a name according to your organisation's naming convention guidelines.

Leave the form alias blank. This field serves technical purposes only and will soon be hidden.

Select the folder/subfolder where the form is to live. Ensure that the location of the form meets your organisation's categorising and best practice guidelines. Then click **Save**.

The form builder will open, ready for you to start designing your questionnaire.



**Test Doc**

Form Document Submissions Settings Role Mapping

Search sections or fields

Start Section

101427781

+ New Section Import from other form Import from section block

See the Sections and Fields guide to explore the steps to build the form.

## 2.1 Form Settings

In the settings tab, we recommend that you complete details for:

**Description:** This will provide a brief outline of the document which the form filler will see in the forms list, and it will help them determine whether that is the document they need.

**Long description:** This provides a detailed outline of the document that the form filler can access in the forms list by clicking on the document tool tip. Bear in mind the user will only see this information if they click on the

tool tip. If there is any imperative information that the form filler should know, you may want to include this information as guidance text within the form itself.

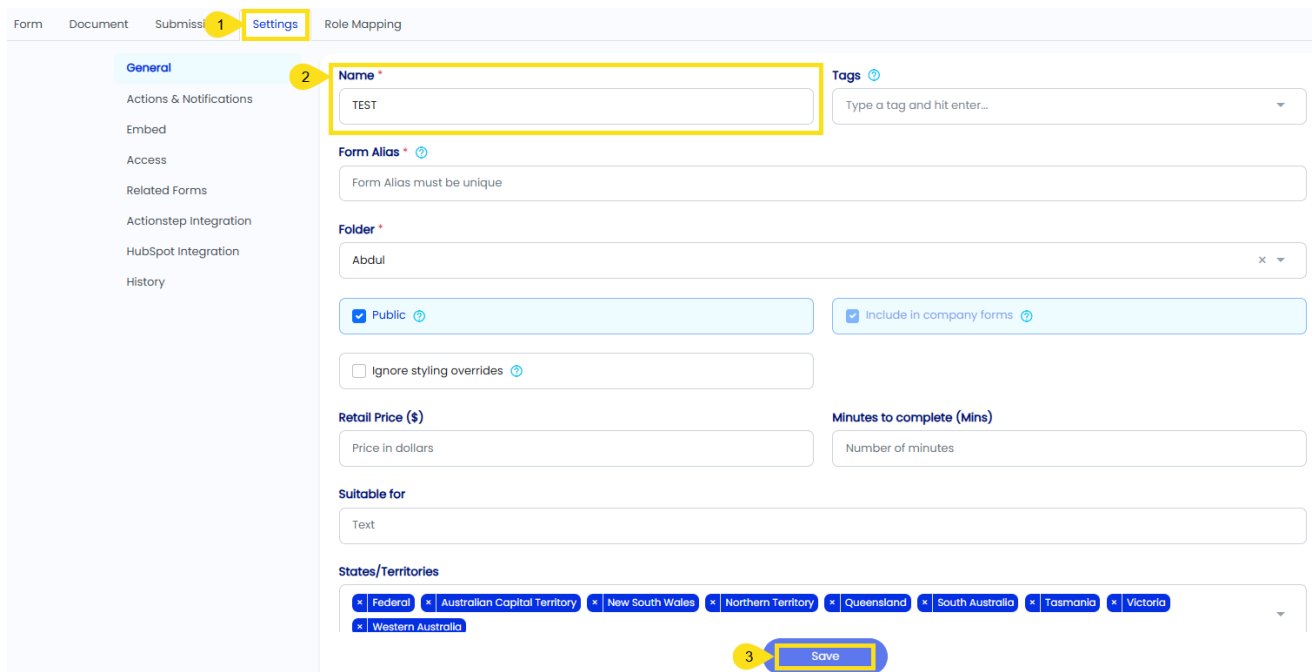
**Time estimate:** Provide the form filler with a guide on how long it should take to complete the form.

**Jurisdiction:** Inform the form filler of the appropriate jurisdictions for using the form.

## 2.2 Rename a Form

To rename a form, locate the form and click on it to open it. Ensure you have the unversioned or published version of the form open (you won't be able to access the settings tab in the draft version).

Go to the **Settings tab**, then adjust the name of the form and click **Save**.

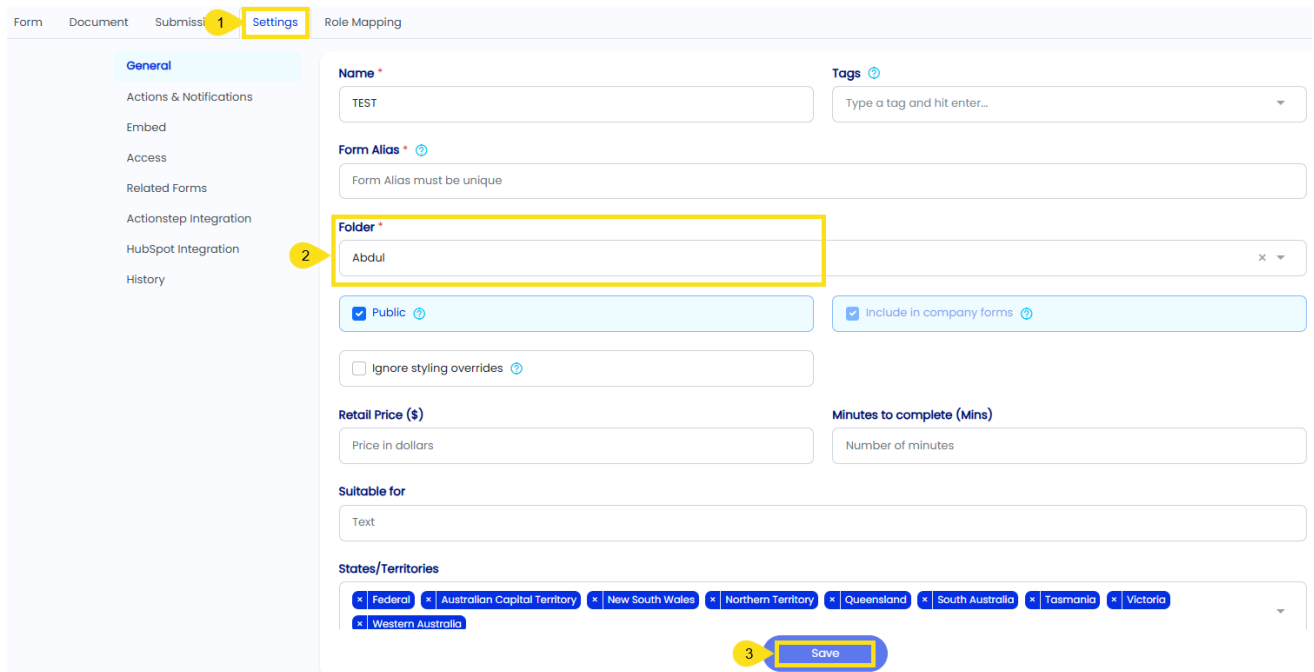


The screenshot displays the 'Settings' tab for a form. The 'Name' field is highlighted with a yellow box and labeled '2'. The 'Save' button is highlighted with a yellow box and labeled '3'. The 'Settings' tab is selected in the top navigation bar, labeled '1'. The 'General' section is active in the sidebar. The 'Name' field contains the text 'TEST'. The 'Form Alias' field is empty with a note 'Form Alias must be unique'. The 'Folder' field contains 'Abdul'. The 'Public' checkbox is checked. The 'Include in company forms' checkbox is checked. The 'Retail Price (\$)' field is empty with a note 'Price in dollars'. The 'Minutes to complete (Mins)' field is empty with a note 'Number of minutes'. The 'Suitable for' field contains 'Text'. The 'States/Territories' field shows a list of Australian states and territories: Federal, Australian Capital Territory, New South Wales, Northern Territory, Queensland, South Australia, Tasmania, Victoria, and Western Australia.

## 2.3 Relocate a Form

To relocate a form, locate the form and click on it to open it. Ensure you have the unversioned or published version of the form open (you won't be able to access settings in the draft version).

Go to the **Settings tab**, then adjust the folder location and click **Save**.



The screenshot shows the 'Settings' tab for a form named 'TEST'. The left sidebar contains a 'General' section with links to 'Actions & Notifications', 'Embed', 'Access', 'Related Forms', 'Actionstep Integration', 'HubSpot Integration', and 'History'. The main content area has several fields: 'Name' (TEST), 'Form Alias' (Form Alias must be unique), 'Folder' (Abdul, highlighted with a yellow box and labeled '2'), 'Public' (checked), 'Include in company forms' (checked), 'Ignore styling overrides' (unchecked), 'Retail Price (\$)' (Price in dollars), 'Minutes to complete (Mins)' (Number of minutes), 'Suitable for' (Text), and 'States/Territories' (a list of Australian states and territories). The 'Save' button is highlighted with a yellow box and labeled '3'.

## 2.4 Delete a Form

To delete a form, locate the form and click on the 3 dot ellipsis and then click **Delete Form**:



The screenshot shows the form details page for 'TEST'. The top bar includes a document icon, the form name 'TEST', the status 'Public form', and the date '24 Feb 2025 3:49 PM'. A dropdown menu is open, showing options: 'Edit', 'Preview', 'Submissions', 'Clone Form', and 'Delete form' (highlighted with a yellow box).



The first stage of deleting a form moves it to the Recycle Bin. Forms will remain in the recycle bin for 90 days, after which they will be permanently deleted without notification. Click **Delete** to move the form to the recycle bin.

#### Move to Recycle Bin



This will move the form **TEST** to the **Recycle Bin**. Forms can be restored within **90 days**, after which time they will be permanently deleted.

Cancel

Delete

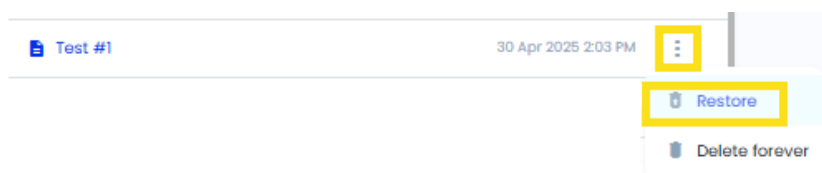
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**Note:** It may be beneficial to create a 'Retired' folder and move old forms here, rather than deleting if you're unsure and don't want the form to automatically expire from the Recycle Bin after 90 days.

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## 2.5 Restore a Deleted Form from the Recycle Bin

To restore a form, locate the form in the Recycle Bin and click on the 3 dot ellipsis and then click **Restore Form**:



## 2.6 Permanently Delete a Form from the Recycle Bin

To permanently delete a form from the Recycle Bin before the 90 day period has lapsed, locate the form in the Recycle Bin and click on the 3 dot ellipsis and then click **Delete Forever**:



You will need to confirm the permanent deletion by typing the response **yes** and click **Delete**.

#### Permanently Delete Form



Are you sure you want to **permanently** delete the form **Test #1**? This action cannot be undone.

**Confirmation \***

Enter 'yes' to continue

Cancel

Delete