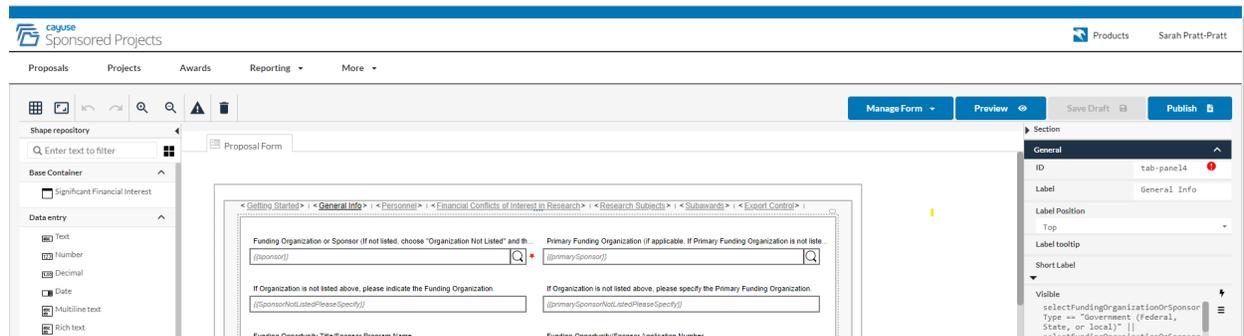


Cayuse Sponsored Projects 4.0 Advanced Form Builder

The Form Builder is the tool you will use to configure your form during implementation and update your form going once you are in production. Your organization is either using the Simplified Form Builder or the Advanced Form Builder. If you are using the Advanced Form Builder, your form builder will look similar to the image below:



This document gives an overview of the Advanced Form Builder.

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Accessing the Form Builder

Individuals with SP System Administrator status will have access to the Form Builder and the ability to edit the form. To access the form builder, navigate to SP, then under the More tab, select Forms.

There are three forms that are part of SP: Award Form, Proposal Form and Subaward Form. The buttons with the arrow icons to the far right of each form name allow you to download and upload forms. A couple of things to keep in mind with this:

- The file will be a .cayuse file which is only readable by Cayuse Sponsored Projects.
- When you download a form, it will download the most recently published version of the form.
- When you upload a form, it will replace the current draft form that is viewable in the form builder but it will not become the active/live form that users interact with until the form is published.

To open one of the forms in the Form Builder, simply click the name of the form you want to work on.

Navigating the Form Builder

There are four main areas of the form builder:

- Top - Buttons are here that allow you to turn on gridlines, zoom in and out, undo actions and delete objects. Other important buttons in this section are:
 - Form Management: This is where we will access the form rules to set for approvals and notifications. You can also access the last 10 published versions of the form here.
 - Preview: This is your best friend! This will take you into preview mode and allow you to see the changes you make. The button to exit preview mode is mostly hidden and appears as a small blue strip peeking out in the upper left corner.
 - Save Your Draft: Edits to the form are not saved automatically so save often!
 - Publish: This publishes the most recently saved draft of your form and makes it the active form. Any new proposals started after publishing will use the new version. Proposals started before the latest version was published will continue to use the previous version.
- Left - “Shape Repository”. These are the different object types you will use to build your form.
- Middle - This is the main working area where you build your form.
- Right - These are the properties of the objects on the left hand side that were added to the middle section. When you select/engage any object in the middle section, the properties for that object will be displayed along the right side.

Using the Form Builder

To add a question/object to your form, select the object from the left section and drag and drop it to the working area in the middle.

When dragging, look for the green box to appear to indicate you are in a place where you can drop that object.

Once the object has been dropped, its properties will appear in the Properties menu to the right. More information on properties can be found in the Object Properties section below. The properties will always be shown for whichever form object is currently selected/engaged. This object will have blue dots around it in the working area. You can also confirm that you are looking at the properties for the correct object by checking the object type (very top left of the properties menu above the General section) and by checking the Label property.

TIP: If you type the question/prompt right when you drop an object onto the form (while the word “Label” is highlighted, the form builder will fill in the label property and the value property. If you later edit the label property, the value property will not change.

The Sections of your form appear as tabs across the top. To navigate between sections in the Form Builder, click on the name of the section.

- Only about 6-7 sections will be visible at one time.

- To see more sections, click the section name on the far right or far left to see more sections to the right or left respectively.
- To reorder the sections use the arrows “<” and “>” that appear to each side of each section name.
- When the section itself is selected and its properties are being displayed, the whole canvas area will have gray dots around it. And the object type displayed at the top of the properties menu will say “Section”.

To edit an object that is already on your form, simply select/engage that object by clicking on it. You can edit the label directly in the working area or you can edit the Label property in the Properties menu.

To delete an object, select that object and then click the trash can icon that appears below and to the object or you can click the trash can icon from the top menu bar.

To delete an entire section, select that section and use the trash can icon from the top menu bar or the trash can icon that appears in the bottom left corner of the working area.

You can copy and paste an object to duplicate that object or to move an object from one section to another. Simply select the object and then use ctrl C and ctrl V to copy and paste.

- You do not have much control over where the object is pasted. If you are copying onto the same form section, if you keep the original object selected, the pasted object will usually appear right below the original object but it will also sometimes appear at the top of the section. When that happens, you can select the new object and drag it to where you want it.
- When pasting to a new form section the object will most often appear below the main form building section. If you leave the object here, that object/question will appear on every form section when viewing the form in the User Interface (UI). If an object appears below the main form building section, you can drag it up into main area. Sometimes you will get a red box and it will not let you drop the object in the main area. If this happens, try resizing the object first and then dragging it up again. It can sometimes take a few tries to get it into the main building area.

You can select multiple form objects at once by using ctrl + click. This allows you to move a group of objects together, or copy and paste several objects at once. It can also be used to set a property, for example default value or visible logic, for several objects at once.

Form Objects

Data Entry and Selection objects expect input from your users.

- These include text boxes, radio buttons, drop down (single and multiple), numbers (integer and decimal), date, and attachment objects.
- Finders are special types of objects that link to data stored in the Admin Module. These include the Org Finder, Unit Finder, People Finder and Research Team objects.

- The Research Team object must be used on your form in order for routing rules to work properly. This is a complex object with several different components. At this time, how this object appears and the information that is and is not required is not configurable.
- There are several integration objects that allow integration with other Cayuse modules if you have implemented both SP and the other module. These include SP-S2S Integration, Human Ethics Study Search and Outside Interests Disclosure Search. There are a couple of articles on the Support Site that provide information about these integrations:
<https://support.cayuse.com/hc/en-us/articles/1500011389902-Proposals-S2S-Integration>
<https://support.cayuse.com/hc/en-us/articles/1500011413002-Additional-Integrations>

Information objects do not expect input from the user and are for displaying information. The Alert object is not currently supported. Do not use this on your form. The Information object is useful for giving instructions and providing additional information. You have lots of options for formatting this text and can also insert hyperlinks. You do not need to set the Short Label or ID property for an Information object.

Section objects are used to create a new section for organizing the form. The only object we will use here is the Section object. Do not use the Container or Subform objects. Do not change the ID property for a Section. This will cause problems with saving and publishing your form.

Object Properties:

There are several standard properties that you will set for just about every object except as noted above for Information objects and Section objects. These are found in the General section of the properties menu and they include:

- **Label** is the question/prompt/information that will appear on the form for the user to see.
- **Short Label** is what will appear in your column headings for all reports and also on the dashboards throughout SP so this should be descriptive. **It must be unique** and it is **limited to 30 characters** and **cannot use special characters** other than a dash or an underscore.
- **ID** is the unique key used behind the scenes by the database to identify the object. This **must be unique**. The form builder will generate an ID but IDs must be changed to correspond to short labels. The ID should be the **same as the short label** but should be **all lowercase** and should **replace any spaces and/or underscores with dashes**.
- **Value** is used behind the scenes to store the information/data entered by the user. It will be important in setting logic for questions which we will be discussing in the next couple of weeks. The Value **cannot have spaces or special characters**. Values should be unique unless you want the answer to one question to also show as the answer to another question on the form.

TIP: If you are completing the form in Preview of the UI and you find that when you enter data in one field that data is also appearing in another field, it is because the Value property for these fields is the same. Change the Value property for one of the fields to avoid this.

Other important properties control if a question appears, if a user can enter data into that question and whether the question is required.

- **Visible** - if checked, the question will appear in the user interface. If unchecked, it will not appear. By default, this will be set to checked when a new object is added. Logic can be used to turn this on or off given answers to other questions. More information on using logic is below.
- **Enabled** - if checked, the user can enter data. If unchecked, the question will appear grayed out in the user interface and the user cannot input any information. By default, this will be set to checked when a new object is added. This property can also be controlled with logic.
- **Required** - if checked, the user is required to input an answer. By default, this will be set to unchecked when a new object is added. This property can also be controlled with logic.

TIP: If a question is appearing grayed out in the UI and the enabled property is checked, the Value property is likely the reason. If there is nothing in the Value property or if the Value property is formatted incorrectly (e.g. has a space or a special character) this will have the effect of preventing the user from entering data in the field in the UI.

There are other properties in the general section that you can use to control how the question is displayed or to provide additional information to the user. These include the Label Position, Label Tooltip and Description properties.

- **Label Tooltip** - if this property is used, a question mark icon will appear next to the label text in the UI and if the user hovers over it, the text entered in this property will appear.
- **Description** - text entered in the property will appear directly under the input area for that question in the user interface. This text cannot be formatted to change the size, font or color.

You can also set a Default Value or Placeholder.

- **Default Value** sets an initial “answer” for the question and that is the stored data until the user changes it.
- **Placeholder** will appear in the input area in the User Interface until data is entered but the placeholder is not stored as part of the dataset.

There are also properties that will appear in the Details and Validation section depending on the object type. Some of the key properties here include:

- **Items** property in the Details section is available for the radio button and drop down objects, this property is where you will set the answer options. Click on the grid of boxes to access the screen to input the options. You can add, delete, add and reorder your list of options.
- **Enable Time** property in the Details section is available for Date objects. It will allow the user to input a time as well as a date. This can be useful for the sponsor deadline.
- **Format** property, also in the Details section is available for Date, Number and Decimal objects. It allows you to set the format for how the date or number is displayed.
- **Allow File Deletions** in the Details section is available for Attachment objects. By default this will be set to “New only” which means that the user can only delete the attached file when it is “new”. Once the user navigates away from the form and comes back in, the file will not be able to be deleted. Most customers opt to set this property to Yes which allows the file to be deleted any time the form is in an editable state for the user (i.e. the form status is “In Development”).

Transferring Data from Proposal Form to Award Form

When building your forms, it is possible to set the Award form up so that data will pull from a selected Proposal record when the Award record is created. In order for this to work, any object on the Award form that will pull data from the Proposal must have the following:

- The short label must be identical to the short label on the proposal form
- The object type (e.g. radio button, date, etc.) must be identical to the object type on the proposal form
- If answer options are set (i.e. for radio button and drop-down objects) the answer options must be identical

TIP: When setting this up, it can be helpful to have the Proposal form open in a second incognito window so that you can easily see the short label, object type and answer options used on the Proposal form as you are creating the corresponding object on the Award form.

Other Tips

Use Firefox or Chrome for best results. Safari should work as well. Microsoft Edge is not recommended.

The Form Builder can sometimes take a minute or two to load depending on how complex the form is. This is normal. Check your email and wait patiently and it will open.

Only one person can be in the Form Builder for a given form (i.e. Proposal Form) at one time. If you are trying to open a form in the Form Builder and you get a “Form Modeler Will Not Load” error, it could be that someone else has that form open in the Form Builder.

The Form Builder can be temperamental. Sometimes using an incognito window in your browser will help.

If you find that you can't fill in certain properties, for example, the short label property drop-down won't open or the Items property won't open to allow you to edit the list of items, you may need to logout and log back in. Make sure to save your draft before exiting the form builder.