2.2.3 Using Form Designer

Designing Forms is easy with Form Designer. You can still upload a Form Template spreadsheet (which is required for some of the more complex functions) but with Form Designer, you can create a form right in the user interface. See [Using the Form Template](#) for information about using the spreadsheet method of building forms. *Note: You can also upload a Form Template and then make changes in Form Designer. However, if you do this and try to download the form template again, you will loose some formatting inside the spreadsheet file (but it will still be fully functional).*

Quick Start

1. Enter Form Designer:

1. Click the **Design** button under your study card on the **My Studies** screen.
2. To add a new Form, click **+Add a Form**. If you want to use an existing Form, go to the next step.
3. Click the Form Card.
4. Click the **Design** button to enter Form Designer.

2a. Add an Item to the Form:

1. Click the **+** button.
2. Enter the text of your question.
3. Click **+Add Question**.
4. Select the icon for the type of response you want for the question.
5. Customize your question settings, skip logic, and validation criteria as needed. For multiple choice questions, replace **Option 1**, **Option 2**, etc. with your choices.
6. Repeat as needed.

2b. Create a Group of Items:

1. Click the item to select it. A blue outline appears to indicate that the item is selected.
2. Click the **Create group with selected questions** button.
3. Click the **+** button within the group to add a new item or drag and drop an item into the group.
4. Repeat as needed.

*Note: You can also hold the **Ctrl** button, select multiple items, and then click the **Create group with selected questions** button. If you start to drag something and then decide not to move it, click the **Esc** button.*

3. Save Your Work

Click **Save Draft** to save your Form.

4. Preview Your Form

Click the **Preview** icon to preview your Form.

5. Exit Form Designer

Click the **X** to exit Form Designer.

6. Add the Form to Your Study

1. Click the **Menu** icon next to your draft.
2. Select **Add to Study**.

Form Designer Details

Layouts

A Layout determines the appearance of a Form, specifically, how items appear on the Form.

You Can Specify a Layout to Display:

- A single item per page or multiple items per page
- Each item in a separate line or items in a grid

To Select a Layout:

Click **Layout & Settings**. New Forms are set to **Grid - multiple pages** by default. Grids are ideal for adding multiple items in a single line. ***Best Practices:***

- *In general, the **Simple** style is best for participant-facing Forms. The **Grid** style is useful for Forms with a lot of information and can deliver a better user experience for research professionals.*
- *If you are not sure how many pages you want the Form to have, consider using the **multiple page** layout, as you can specify the number of pages (including a single page) while the **single page** layout restricts you to one page.*

Layout Options:

- **Simple - single page:** Items appear in rows on a single page. In the Form Definition spreadsheet, this is configured by leaving the **Style** column blank.
- **Simple - multiple pages:** Items appear in rows with each item on a separate page. In the Form Definition spreadsheet, this is configured by entering pages in the **Style** column.
- **Grid - single page:** Items appear in columns on a single page. In the Form Definition spreadsheet, this is configured by entering **theme-grid** in the **Style** column.
- **Grid - multiple pages:** Items appear in columns with each on a separate page (default). In the Form Definition spreadsheet, this is configured by entering **pages theme-grid** in the **Style** column.

001: Medical History

2.2.1 Diabetes History

Date of diagnosis of diabetes:	🗩
yyyy-mm-dd	⟳

[Close] [Next →]

Grid – multiple pages

001: Medical History

2.2.1 Diabetes History

Date of diagnosis of diabetes: 🗩	Was the subject ever treated 🗩 with oral anti-hyperglycemic agent?
yyyy-mm-dd ⟳	○ Yes ○ No

[Close]

Grid - single page

001: Medical History

2.2.1 Diabetes History

Date of diagnosis of diabetes: 🗩

| yyyy-mm-dd | ⟳ |

[Close] [Next →]

Simple - multiple pages

001: Medical History

2.2.1 Diabetes History

Date of diagnosis of diabetes: 🗩

| yyyy-mm-dd | ⟳ |

Was the subject ever treated with oral anti-hyperglycemic agent? 🗩

○ Yes ○ No

[Close]

Simple - single page

Icons

The following icons appear on in the upper-left corner of the Form Designer screen: [table id=9 /] The following icons appear on the right-hand side of each item: [table id=10 /]

Layout Groups

Layout groups are a set of items that are grouped together on a Form. This feature is optional, and you can decide to include/exclude layout groups based on how you want the Form to look. These should not be confused with item groups, which are internal groups used in the database and data extracts. To group items together, select each item on the top left item type icon, and then click the **Group** button. Once a group has been created, you can drag-and-drop items into that group. To use group settings, click the **Settings (Gear)** button in the group header.

Within Group Settings, You Can:

- Make items in the group appear on the same page
- Specify the number of columns of items in the group
- Create a repeating group
- Define skip logic for the entire group

Content Library

Use the Content Library to add pre-made items to your forms. Instead of creating the same item each time you want to add it to a form, save the item or group of items in the Content Library to add it to the form instantly. For more information, see: [Content Library](#).

Preview

Click the **Preview** button to preview your form.

Versions and Drafts

Click the **Save Draft** button in the upper right-hand corner to save your Form. This does not:

- Create a new version
- Include the draft when you publish your study
- Appear on the Activity Log

Your updated design appears on your Form card in Study Designer under **Drafts**. Your draft is labelled **(latest)**, and if you have multiple drafts, it is moved to the top of the list.

To Create Multiple Drafts:

1. Open the Form in Form Designer.
2. Click **Layout & Settings**, and change the value in the **Version number** field.
3. Click **Save Draft**.
4. Repeat the process for each draft.

To Discard a Draft:

Click the **Menu** button next to the draft you want to delete, and selecting **Discard.** *Note: Discarded drafts are not retrievable.*

To Save a New Version:

1. Click **Layout & Settings**, and change the number in the **Version number** field.
2. Click **Save Draft**.
3. Exit Form Designer.
4. Click the **Menu** icon next to the draft you want to make a version.
5. Select **Add to Study**. Your Form becomes a version, and is no longer displayed in the **Drafts** section of the Form Card in Study Designer. This version is included when you publish your study.

To Overwrite an Existing Version:

1. Do *not* change the version number.
2. Click **Save Draft**.
3. Exit Form Designer.
4. Click the **Menu** icon next to the draft you want to make a version.
5. Select **Add to Study**. Your pre-existing Form version is replaced by your new version, and is no longer displayed in the **Drafts** section of the Form Card in Study Designer. This version is included when you publish your study.

*Note: If you want to make a new version of a Form (and not overwrite an existing Form), make sure to change the version number in the **Layout & Settings** panel.*

Form Designer Limitations

Currently, Form Designer does not support all of the functionality that is available in OpenClinica Forms. Instead, use the Form Template to take advantage of these features. Specifically:

- You cannot use cross-form logic in Form Designer.
- You can add edit checks in Form Designer but hard edit checks must be defined in the Form Template.
- There is no functionality for cascading selects (i.e. you cannot restrict the list of options available in the next item based on the previous selection. You can still add conditional fields to determine whether the next item appears at all.)

Form Designer and Form Template Fields

Click the images to enlarge them. [table id=49 /]