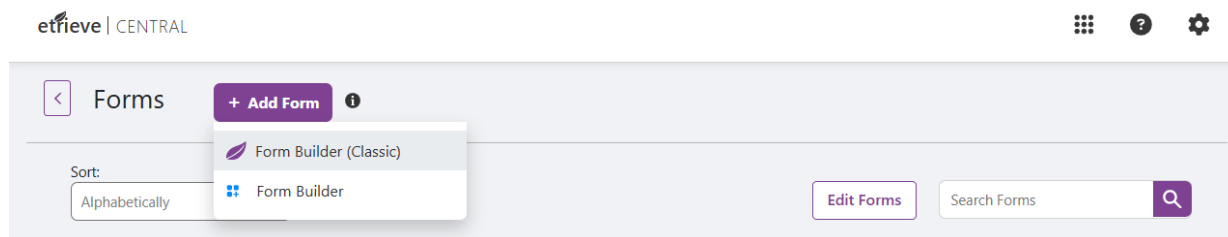


Form Builder Quick Start Guide

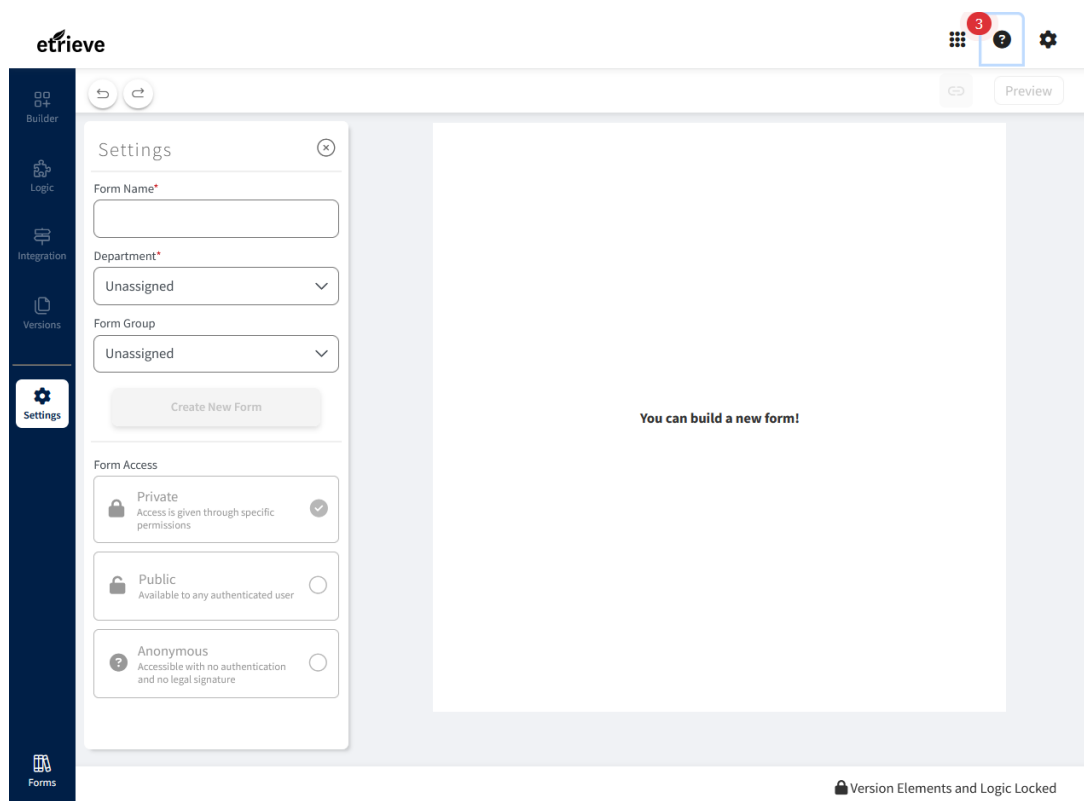
The no-code **Form Builder** allows you to easily build forms without requiring you to have any knowledge of **HTML, CSS, or JavaScript** code like the **Classic Form Builder**.

To access the Form Builder, navigate to the Forms List tile in the Central Administration and choose "+ Add Form" and "Form Builder."



You will be presented with the form Settings:

- Form Name
 - Form Name must be unique.
- Department
 - Department is required and can be used if departmental ownership is required.
- Form Group
 - Form Groups can be assigned to more easily categorize your forms in the Form Library. These can be created from the "Form Groups" tile on the Etrieve Central Administration page.
- Form Access
 - Forms are always set to **Private** by default. This means that only users with specific permissions can access them. You can also set your form to **Public**, which means any authenticated user can access it, or **Anonymous**, which allows even users who aren't signed in to access the form.

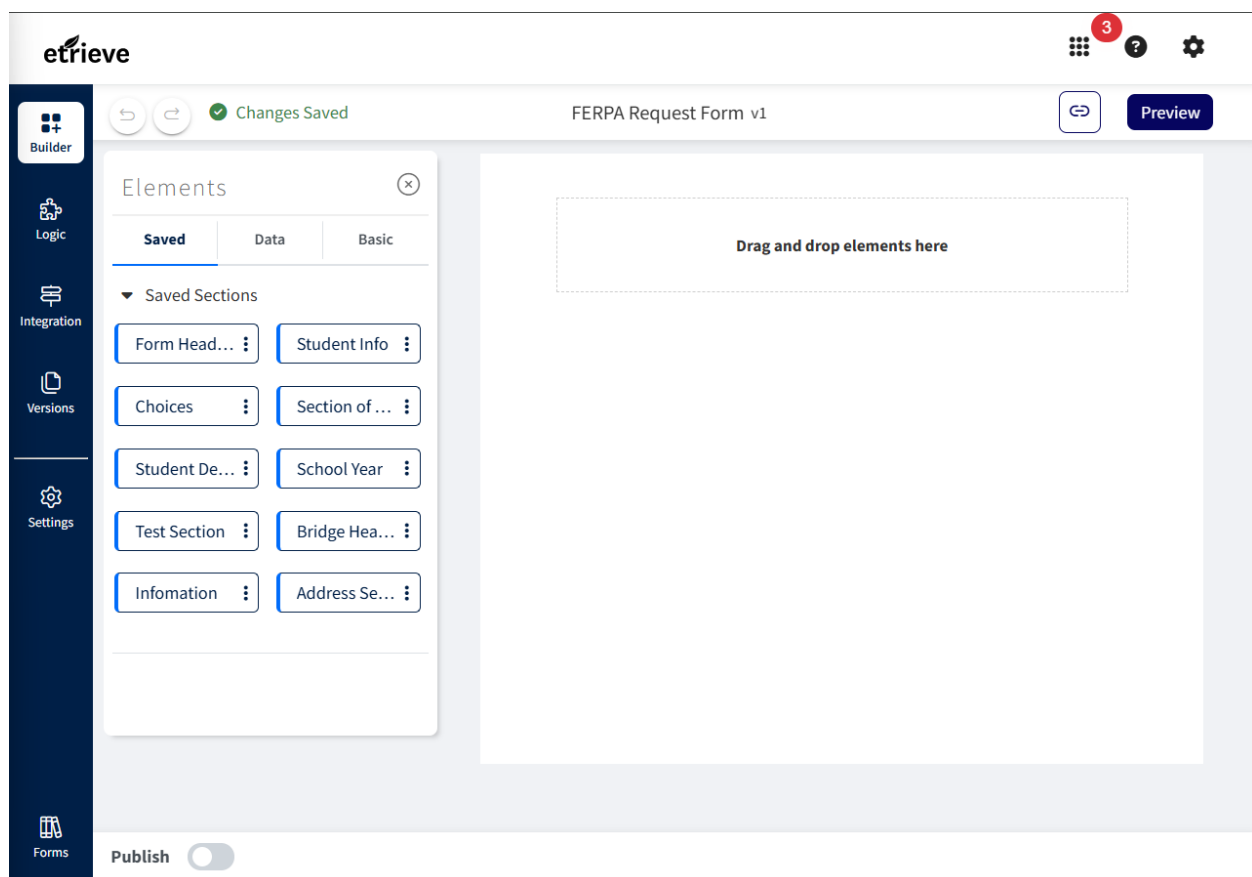


Once you have created your new form, you will be presented with the Elements panel to begin building.

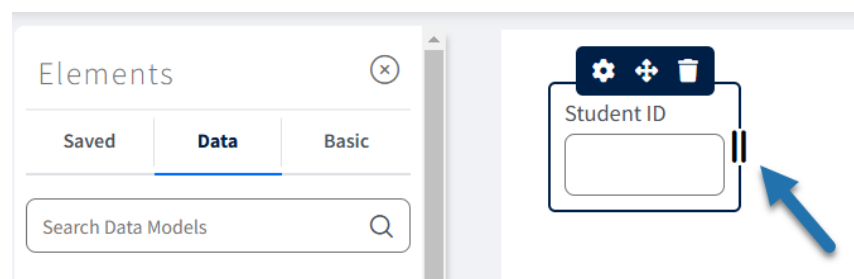
The Elements Panel provides access to three distinct sections:

1. **Saved:** This section contains globally saved sections that you or other form builders have created within your organization for reuse.
2. **Data:** Softdocs provides pre-categorized data models. Utilizing these elements as a starting point enables further data categorization for reporting, integrations, and upcoming features.
3. **Basic:** If the desired element is not found within the Data section, the Basic section offers access to all available element types.

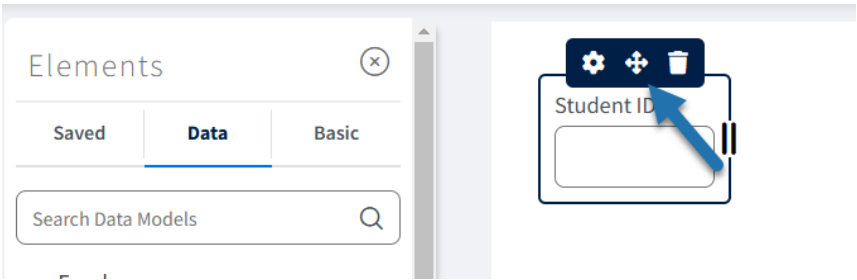
You can drag and drop any elements onto the Form Canvas. You can also add an element to the bottom of the canvas in a new row by clicking on the element.



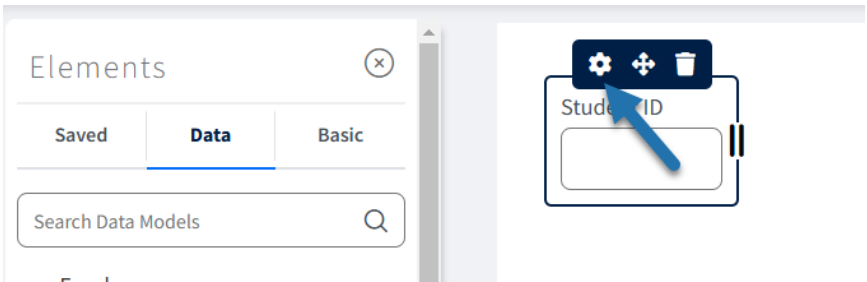
You can resize your elements directly on the canvas using the drag handler on the edge of the element.



You can re-order your elements directly on the canvas using the drag handler on the element toolbar.



You can access the configurations for the element using the gear in the element toolbar.



You can customize most elements for a specific purpose by changing their settings. Some elements, like **Number** and **Calculate**, have more settings than others.

Input	Calculate
Data Model: Student Element: Student ID	
Label *	Label *
Student ID	Calculate
Placeholder	Placeholder
Unique ID * ⓘ	Unique ID * ⓘ
student_id_1	calculate_1
Width	Width
3	3
Required	Currency
<input type="checkbox"/>	No currency
Read Only	Equation
<input type="checkbox"/>	
Valid Format Mask ⓘ	Decimal Places
Select or Enter Format	2

After adding a few elements to your form, you can **Preview** it. From this view, you can interact with the form and see what it looks like to someone filling it out. If you want to go back to editing, select the **Pencil**.

etrieve

Builder

Logic

Integration

Versions

Settings

Forms

Changes Saved

FERPA Request Form v1

Preview

Softdocs University

FERPA Release Registrar

Paragraph

Sans Serif

B

I

U

A

Text Color

Background Color

Link

Unlink

Align Left

Align Center

Align Right

Justify

Under the Family Educational Rights and Privacy Act (FERPA), Softdocs University is permitted to disclose information from your education records to your parents if your parents (or one of your parents) claim you as a dependent for federal tax purposes. Please indicate whether your parents claim you as a tax dependent.

Please check the appropriate option:

☐ Yes. I certify that my parents claim me as a dependent for federal income tax purposes.

☐ No. I certify that my parents do not claim me as a dependent for federal income tax purposes.

Publish

etrieve

Preview

Softdocs University

FERPA Release Registrar

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etrieve

Preview

Student ID

Calculate

When you're all set to start using your form, don't forget to hit **Publish**.

The screenshot shows the etrieve form builder interface for a form titled "FERPA Request Form v1". On the left is a dark blue sidebar with navigation icons for Builder, Logic, Integration, Versions, Settings, and Forms. The main workspace is divided into two panels. The left panel, titled "Elements", has tabs for "Saved", "Data", and "Basic". Under the "Saved" tab, there are several "Saved Sections" listed in a grid: "Form Head...", "Student Info", "Choices", "Section of...", "Student De...", "School Year", "Test Section", "Bridge Hea...", "Information", and "Address Se...". At the bottom of this panel is a "Publish" button with a toggle switch, which is highlighted by a blue arrow. The right panel shows a preview of the form. It features the Softdocs University logo and the title "FERPA Release Registrar". Below this is a rich text editor with a toolbar and a paragraph of text about FERPA. At the bottom of the preview, there are two radio button options for certifying parental dependency.

Using the **Share Links** button, you can easily create a shareable link for users to complete this form version.

This screenshot shows the same etrieve form builder interface as the previous one, but with a different focus. The "Publish" button is still visible at the bottom of the left panel. However, a blue arrow points to the "Share Links" button, which is represented by a link icon (two overlapping squares) located in the top right corner of the main workspace, next to the "Preview" button. The rest of the interface, including the sidebar and the form preview, remains the same.

If the form template version is published or submitted in a workflow, it will be locked against editing.

etrieve

FERPA Request Form v1

Builder

Logic

Integration

Versions

Settings

Forms

Publish ☒

Version Elements and Logic Locked

Preview

Softdocs University

FERPA Release

Registrar

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A new version can be created based on any previous version by using the **Versions** menu option. Depending on your privileges, you may also be able to delete all submissions of a version so the version can be unlocked. You can only have one version of a form published at a time.

etrieve

FERPA Request Form v1

Builder

Logic

Integration

Versions

Settings

Forms

Publish ☒

Version Elements and Logic Locked

Preview

Softdocs University

FERPA Release

Registrar

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Versions

FERPA Request For... Published

Version Description

New FERPA Request Form V1 builder

Create New Version