

OpenForms Form Building and Admin Training

About this training

- Designed for everyone who will be building forms, analyzing responses, and acting as an administrator of the organization's OpenForms account (or has the OpenForms roles Author, Reporter or Admin)
- Step by step introduction to OpenForms with a focus on learning how to navigate the platform.
- Once you have a baseline understanding of the platform, we'll introduce advanced features such as Smart Logic, analyzing responses, using form analytics to track form performance, and best practice tips to help build smarter forms.
- Before the training, we will add you to your OpenForms organization account. Look out for a verification email from OpenForms to complete registration. Once you can log in, you're all set up to participate in the hands-on form building training activities.
- After the training, we will send you a recording of the training session. The recording will be roughly 2 hours long. If there is a specific topic covered in the session that you find interesting, we recommend recording the rough timestamp of this topic. Since there is no better way to learn than learn by doing, we recommend following the video and trying out each functionality introduced as a take home task. You can try out these tasks on a test form in a workspace called 'Training' in your OpenForms account.

Before the training

- Ensure you can log in to your organization's OpenForms account here: <https://login.openforms.com/>
- The training is run remotely through Microsoft Teams. To ensure the training runs smoothly, each attendee should have their own PC with a connected headset. Additionally, attending the training session with dual monitors works best to follow the trainer's demonstrations.
- You're more than welcome to hold the training session in a conference room on a projector/big screen. Having individual PCs allows all attendees to participate in the hands-on form building activities and headsets ensure that you can join in on the conversation and ask questions with clear audio.

Agenda

- Welcome to OpenForms
- Getting around OpenForms after logging in
- Forms area where you build, import, and edit forms
- Admin area and key administration features: Field sets, Text snippets and Lists
- Creating your first form
- Types of fields in OpenForms, settings for form fields and main use cases for each field type
- Introduction to Smart Logic to show or hide fields under certain scenarios
- Introduction to building calculations to calculate a value that can be used to take payments
- General settings of forms: scheduling a form's publish or deactivation date, allowing respondents to save their progress
- Setting up notifications for internal staff informing them of form submissions
- Setting up confirmation emails and response PDFs for respondents
- Embedding an OpenForm on your OpenCities site or a webpage
- Adding form-level editing and response viewing permissions
- Viewing and exporting form responses
- Tracking form performance with form-level Analytics
- Versioning in OpenForms and checking a form's version history
- Accessing the OpenForms Help Centre and seeking support
- Q & A

And if time permits, your trainer can demonstrate...

- How to use submission logic to stop form submissions in decision tress
- Overview of Insights to view stats on all your organization's forms
- Setting up Google Maps to work with location fields