Dynamic Application Forms
(On VSys Live)

Intro:
The idea behind **dynamic application forms** is that you have the collection fields listed and the system helps display it most efficiently for the end user – so a phone layout isn't just a tiny version of a monitor version.

There are MANY ways to configure and make these applications very sophisticated. These are the basic to intermediate configurations so that if you are starting to design one or already have one in your system you can "read" what you have and make modifications if needed.

It all starts in **Application (Setup)**

Adding fields:
You have two kinds of fields on the left navigation bar to add: fields and user fields. The difference?
- **Fields:** these are the data fields that tie to the data stored in VSys
- **User fields:** are either special fields, or data only seen in the application (usually shows in green).
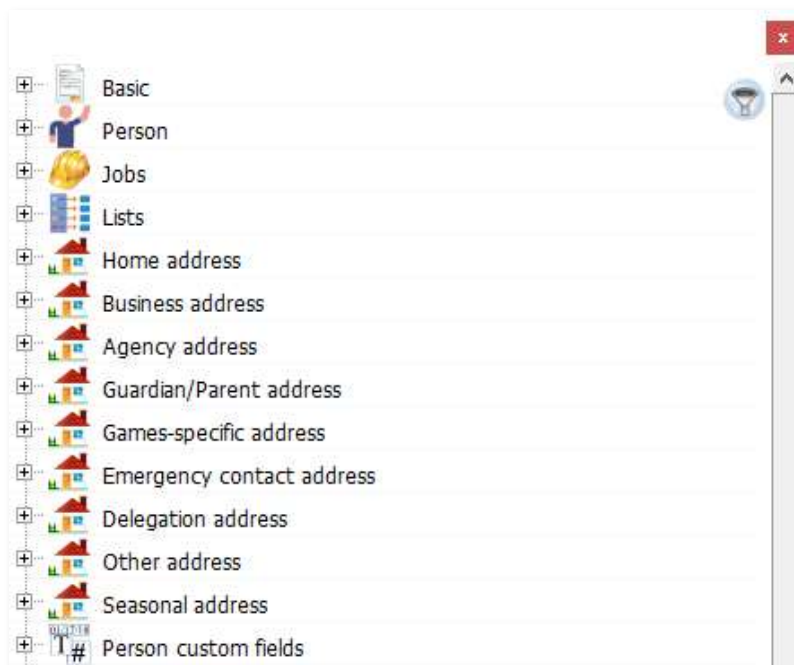
If there is ANY chance you will need to report on the field, make it a custom field and pull it in from the Fields section.

Example: You want to collect *Highest level of education*
- Option one: **User fields** -> **Single choice field,** with a drop down for the levels. You have it in the application for the interview, but you can't report on it.
- Better option two: Make a **Custom field**, then add it from the **Add field**. Then it is in the person's profile and you can report and filter on the information.

Fields (data fields):
Clicking **Add field** on the left navigation pops up a data tree like you see in Letter Templates or Advanced Exporter. **Plus** symbols will expand that section to see the fields.

Click and drag to move an element to the application form in the center of the screen. They will line up in a list. From the list, the application will be dynamically adjusted to fit the screen display the person is using.
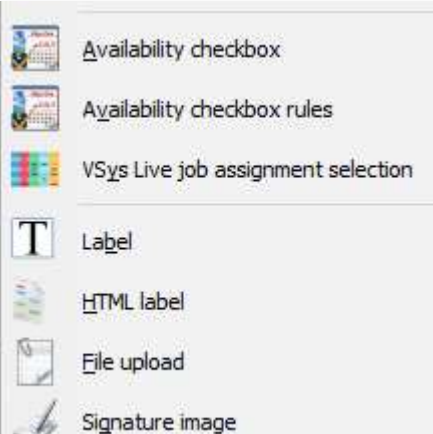
☐ _____	1	**First name** (Person: First name) Label: First name	**Text**; **Required** *width: 300px*
☐ _____	2	**Family/last name** (Person: Family/last name) Label: Family/last name	**Text**; **Required** *width: 300px*
☐ 01/17/18	3	**DOB** (Person: DOB) Label: Date of Birth	**Date**; Line break

Tip: Remember your "funnel" at the top right will allow you to search for specific field to add.

Person
- First name (preferred)
- Job preferences
- Job preferences (as checklist)
- Name prefix
- Name prefix (combo)
- Preferred phone type

pref ⊗

User Fields (special):
While most of the time you will want to make custom fields so you can filter and report, there are some important special options at the bottom of the User fields

Availability checkbox
Availability checkbox rules
VSys Live job assignment selection
T   Label
HTML label
File upload
Signature image

- *Availability* – using these availability fields will make it searchable in VSys.
- *Label* – this is your "add text" field. You can add a subheading, or full paragraphs.
- *File upload* – allow applicants to upload a resume or other file.
- *Signature* – add a place to use a mouse to add a signature.

Reading the pieces/ Making it pretty:
In the example below, the first box on the application is *First name* and it's tying back to the **First name field** in the person's profile. The box on the application will be labelled **First name**. It is a required text field.

The third is the VSys **DOB field**, but the applicant will see a box with a **Date of Birth label,** and whatever field is next will be on the next line with the Line break. It is not a Required field.

☐ Lorem	1	**First name** (Person: First name) Label: First name	**Text; Required** *width: 300px*
☐ Lorem	2	**Family/last name** (Person: Family/last name) Label: Family/last name	**Text; Required** *width: 300px*
☐ 01/17/18	3	**DOB** (Person: DOB) Label: Date of Birth	**Date; Line break**

You can see all the options by clicking the item open.

Many of the same options are also available quickly on the **right-click** menu. Some of the most frequently used are:

- *Start a new line after this field* – adds a specific line break
- *User instructions* – adds hints for applicant ("remember:….")
- *Required* – application cannot be submitted if this is blank
- *Hidden in VSys Live* – not sure if you're ready to delete it, just hide it for now
- *Validation* – looks for formats such as phone numbers or email
- *Capitalization* – restrict names to Title Case for the folks who LOVE or hate them
- *Set default* – if most are going to use the same value have that pre-selected
- *Limit options* – if you only want them to see specific values in a drop-down
- *Include blank as an option* – forces applicant to select the value on the drop-down

*Tip: Is **Hidden in VSys Live** greyed out? Chances are you have the field marked as Required at the same time. It can't be both.*

Tip: Do the all the boxes for data entry look the same size/too big? There are no fixed rules, but some starting **Width** *sizes to try:*
- *Name - 300*
- *Line 1 (Street address) - 400-600*
- *Zip - 125*
- *Memo/Signature - 400-600*

Accessibility/Helping your applicants

One of the things that can help your applicants and accessibility is adding **Parent fields**. These help with both screen readers and with explaining error messages when an application is missing information.

Example: An application may request several phone numbers. In fact, it may ask for "home" numbers for both the applicant and their emergency contact. Or maybe "work phone" from the applicant, emergency contact and reference. Using the subheading labels that break your application into section, add them as Parent fields.

Then a screen reader will know "Emergency contact home phone" instead of just "home phone" and error messages will be clearer.

Properties:

Much like "properties" in a letter template, the **Application properties** give the information on how the system uses the application. From the **Edit** section on the left navigation bar -> **Application properties.**

As you can see, there are a LOT of options and it's unlikely you need them all. The ones that are most important or trip up constructing an application are highlighted in yellow.

Basic properties:

- *Application name*: Shown to you
- *Don't show on menus or listings*: There are two ways of putting an application on your Live site – individually or with an "all applications" block. If you're not sure, this will make sure it doesn't show before you are ready.
- *Code*: This becomes the end of the URL for the application
- *First date to show/Last date to show*: These allow the application to turn off/on automatically.

Requirements:

- *Valid for what types of people/groups*: Important if it's for existing people

Options:

- *Default type for new people* – Important to give the new person a complete profile, can block submission
- *Default group for new people* - Important to give the new person a complete profile, can block submission

Tip: What if you have one application that covers more than one site/department? Requested sites/departments allows the prospective volunteer to pick where the application is routed and also these default values. We're not covering it today, but you can read more at https://www.vsysone.com/docs/VSys/HTMLDocs/current/#3455.htm

VSys Live application:

- *Usage*: Who can use/see the application
- *Default status for new people*: If you are using Eligibility Checklists, make sure the status matches here. Otherwise, this may control if a new volunteer can sign up for opportunities.
- *Show on menus as*: This is what shows to the volunteer – will override the name at the very top.
- *New user ID validation*: Generally, set for e-mail unless you are using a different authentication.

VSys Live submission:

- *After successful submission of the application, consider the volunteer to be logged in* – Important if the volunteer should be allowed to continue with trainings or schedules.
- *Send thank you email/Send administrative notification email* – Emails may also be configured to send through the notifications system -so check that as well if you don't see emails configured here.

VSys Live prompts:

- *Instructions* – Shows at the top of the application form before the login section
- *When unavailable* – For something that might get turned off and on, what if someone uses the link while it's off?
- *When a pre-existing ID is entered* – You can change this, but be cautious of giving away information (default recommended)
- *Thank you prompt* – Pop-up on screen after application is submitted.

*Tip: These boxes take HTML formatting if you know it. Just the basics <h3>, <h4>, <strong>,
 - go a long way. Don't know HTML? – no worries.* **Uncheck** *the* **Show raw HTML** *box at the top and you get an editor.*

Testing your application

So you have a draft and you want to see what it looks like – easiest way:
In the list of applications**, right-click -> Get VSys Live page link**

You can then paste this in your browser to see the application form. (And if you want to share it, this link is good for that as well.)

Tip – When you are making changes and want to see them, remember there are a couple screens to save back to save completely. Shortcut – Hold down the Save button and pick Save All. That lets you stay where you can edit while still letting you refresh the browser to see changes.

For more details on working with Dynamic Application forms, please check out our online documentation starting at:
https://www.vsysone.com/docs/VSys/HTMLDocs/current/#4011.htm