

Dynamic Application Forms

(On VSys Web Advanced)

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.

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. (These show in **green**.)

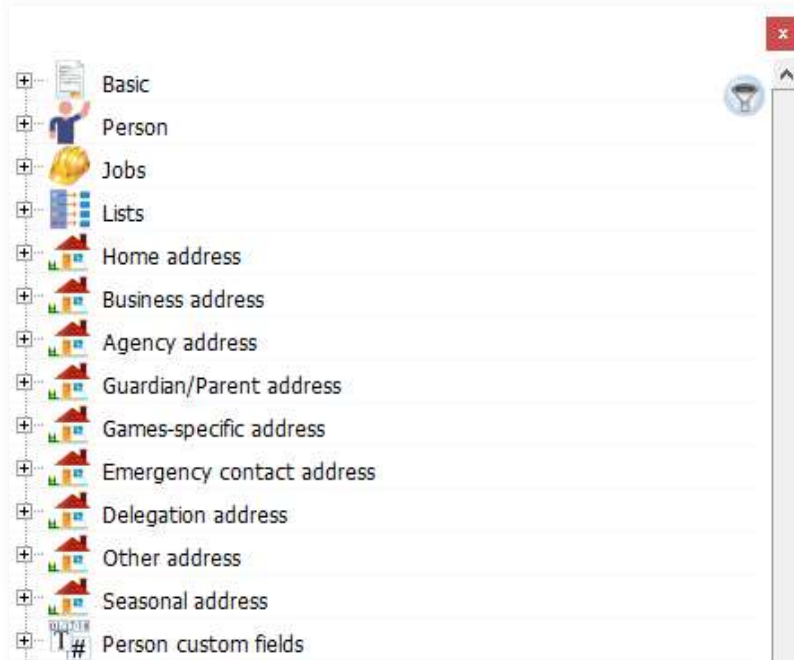
If there is ANY chance you will need to report on the field, make it a custom field and pull it in from the Fields section.

Example: You want to collect *Highest level of education*




- Option one: **User fields** -> **Single choice field**, with a drop down for the levels. You can see 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.

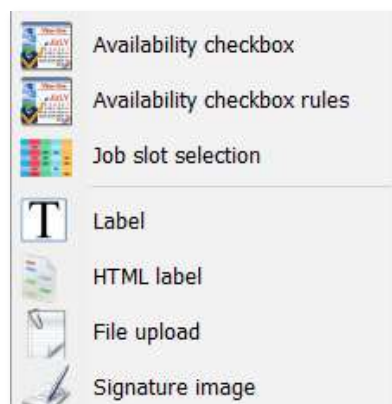
	1	First name (Person: First name) Label: First name	Text; Required width: 300px
	2	Family/last name (Person: Family/last name) Label: Family/last name	Text; Required width: 300px
	3	DOB (Person: DOB) Label: Date of Birth	Date; Line break

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



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* – add checkboxes to the application for when
- *(Availability checkbox rules* – not valid on Web Advanced – you’ll get an error message)
- *Job slot selection* – allows the applicant to pick a position/shift, usually for large events
- *Label* – this is your “add text” field. You can add a subheading, or full paragraphs.
- *(File upload* – not available on Web Advanced)
- *(Signature* – not available on Web Advanced)

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 Required.

	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
	3	DOB (Person: DOB) Label: Date of Birth	Date; Line break

You can see all the options by clicking the item.

☐ Start a new line before this field
 ☐ Start a new line after this field
 ☐ Do not print this field
 ☐ Hide in the applications approval tool
 ☐ Hidden in VSys Live

☒ Show label
 ☐ Required
 ☐ Read-only
 ☐ Read-only if used by an existing person and field is not blank
 ☐ When value is changed, re-apply all visibility rules

☐ Prevent automatic translation

aria-label:
 Parent field:

Font family:
 Font size: inherit
 Font style: inherit
 Font weight: inherit
 Font variant: inherit
 Text alignment: inherit
 Show to: Everyone

Font color:
 Background color:

Width: 125
 Min display width: 0
 Max display width: 0
 Height: 0
 Min display height: 0
 Max display height: 0

HTML class:
 HTML style:

Maximum characters: 0

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
- *Required* – application cannot be submitted if this is blank
- *Hidden in VSys Web* – 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
- *Limit visible 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 Web** 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* - 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**.



There are not a lot options, but the ones that are most important or trip up constructing an application are highlighted in yellow.

Basic properties:

- *Application name:* Shown to you

- *Application type*: VSys Web application
- *Allow use as a desktop application, too*: If you are still expecting to need to hand key applications in the office, this can be a good way to standardize data entry.
- *Code*: Needs to be unique, becomes part of the URL
- *First date to show/Last date to show*: These allow the application to turn off/on automatically.

Requirements

Minimum age: Maximum age:

0 0

Options

Default type for new people: Default group for new people:

Volunteer Blue Springs Home Health

Options:

(these replace the old hidden fields that you needed to put in)

- *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 Web application

Title at top of page: Applicant primary e-mail field: (this field will be marked as requiring a valid e-mail address)

☐ Send a confirmation e-mail to anyone who fills out this application

Send administrative e-mail when applications are ready to be downloaded:

After an applicant successfully completes this application, send them to this URL: (leave blank for normal handling)

Web instructions:

<h3>VOLUNTEER APPLICATION FORM</h3>

Thank you for offering to volunteer your time and skills at Our Organization. In order to facilitate the most appropriate volunteer placement for you, the following information would be helpful. Please ensure that all the questions are completed as fully as possible.

Message to show after submitting application:

VSys Web application:

- *Applicant primary e-mail field* – (this field will be marked as requiring a valid email address)
- *Send a confirmation email to anyone who fills out this application* – Checking this opens options to automatically send a response. This could be expectations, next steps or a simple confirmation.
- *Send administrative notification email when applications are ready to be downloaded* – New applications only come into your system when you synchronize. Depending on your volume you may want to know when there are new applications, or you might just want to make it part of your daily/weekly schedule.
- *Web Instructions* – Shows at the top of the application form before the login section

- *Message to show after submitting application*– Pop-up on screen after application is submitted.

Tip: Not sure what a text box does or where it shows? Type the label of the box in the box, and save it. Then see where it shows. It makes it easy to backtrack to change it once you know how it fits with the picture.

*Tip: These boxes take HTML formatting if you know it. Just the basics <h3>, <h4>, ,
 - go a long way. Don't know HTML? – no worries, plain text works too.*

Testing your application

To see your application, you will need to **Synchronize with the VSys Web Advanced database**. (VSys Web -> **Synchronize with the VSys Web Advanced database**) This pushes the application online and will be the same process you use to retrieve completed applicant forms.

Once it is online you should be able to see it under applications. (Not showing? Check the top section in the **Properties** of the application form.)



Keep in mind you will need to synchronize after each round of edits to see the changes and then reload the web browser.

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>