lucity
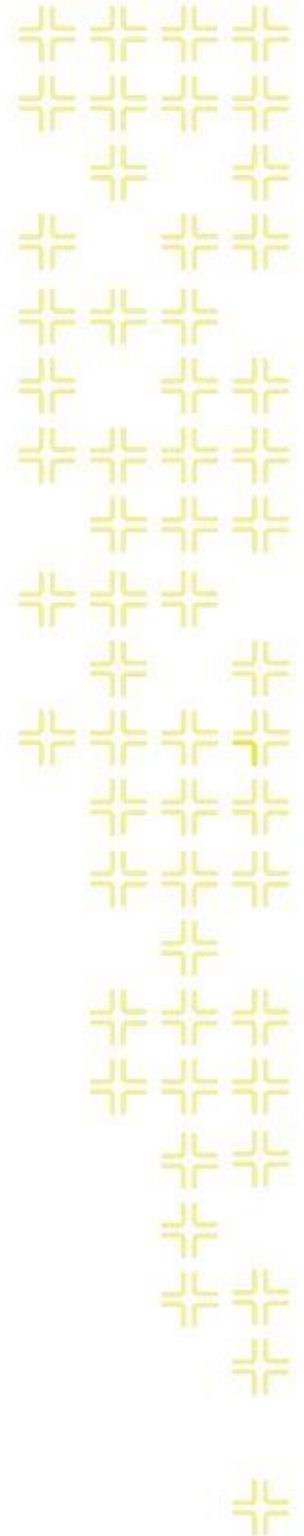
TRAINING GUIDE

Admin
New Forms

Form Features

This section reviews the features of the new HTML forms.

Contents

Overview

The Lucity 2018 release contained the first version of our new HTML forms. HTML forms replace a much-aged ASP.NET form. The first release was missing some features. All clients who upgraded to 2018 were able to switch back to the ASP.NET forms if those features were needed for users. Either all users are on HTML or all users on the older ASP.NET forms. If you are on 2018 and have HTML forms disabled, it is important that you get feedback from users on HTML forms so that we can get that feedback and adjust. In Lucity 2018r2 we completed all planned features for HTML forms on Lucity Web. We automatically reverted all clients to HTML forms in the 2018r2 release. If you need to disable HTML forms in 2018r2 you can, but it is critical that you communicate with Lucity your concerns because in Lucity 2019 you may not be able to revert to ASP.NET forms for HTML web any longer.

The following features are not planned for the new HTML forms. These are only relevant to Citizen Portal. They worked in Lucity Web ASP.NET forms but we do not plan to support them in HTML forms

- Copy Request Button
- Create Request buttons on the form
- There will be no thank you page
- There will be no "Add Another" button (but there will be an add button on the form)
- There will be no file upload control (but there will be a documents button on the form)
- Remember me checkbox will not be added to HTML forms

Submit forms are forms that appeared in the menu in Lucity Web and allowed a user to go directly into a form with a "Submit" button. These have been modified so that they look much more like the traditional forms.

Note: These changes do not apply to Citizen Portal forms. These remain unchanged.

- Removed the **Submit** button. Information entered is now saved using the standard Save button.

- Removed the **Thank You** page.

- Removed the **Add Another Button**. All HTML forms have an Add New button, so this was redundant.

- Removed the **File Upload** field. All HTML forms have a Documents button, so this was redundant. Files must be attached after the record has been saved.

- The **Remember Me** checkbox will not be added to the HTML forms.

- **Use Employee Information** - This behavior is converted to a form option (must be enabled in the legacy form editor). When enabled the logged in user's information will be used to fill out contact information on the request. This is ideal for submittal forms for internal requests.

New Form Features in Lucity 2018+

Undo/Redo (Lucity 2018)

Pretty self-explanatory. It maintains an undo/redo stack. That stack is cleared on save or on canceling or closing the form.

Form Information

Provides general information about a form. This is helpful for communicating between a user and an administrator on what form they need modifications made. It appears in the form menu button:
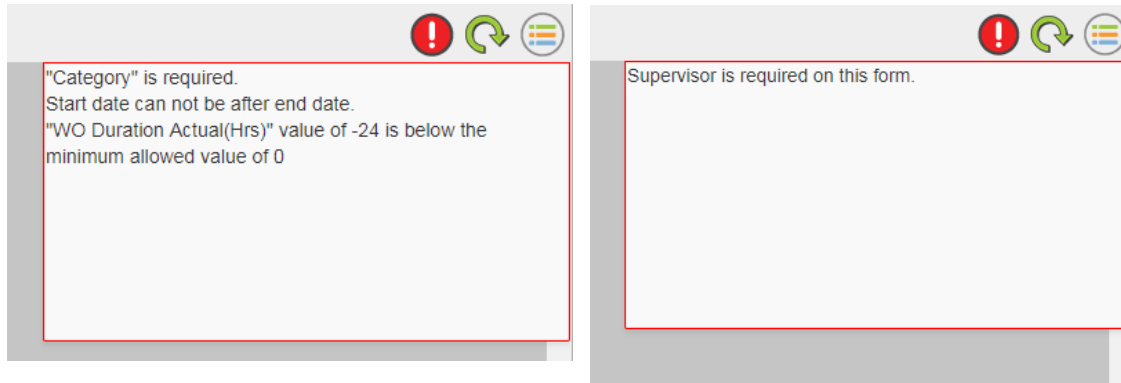

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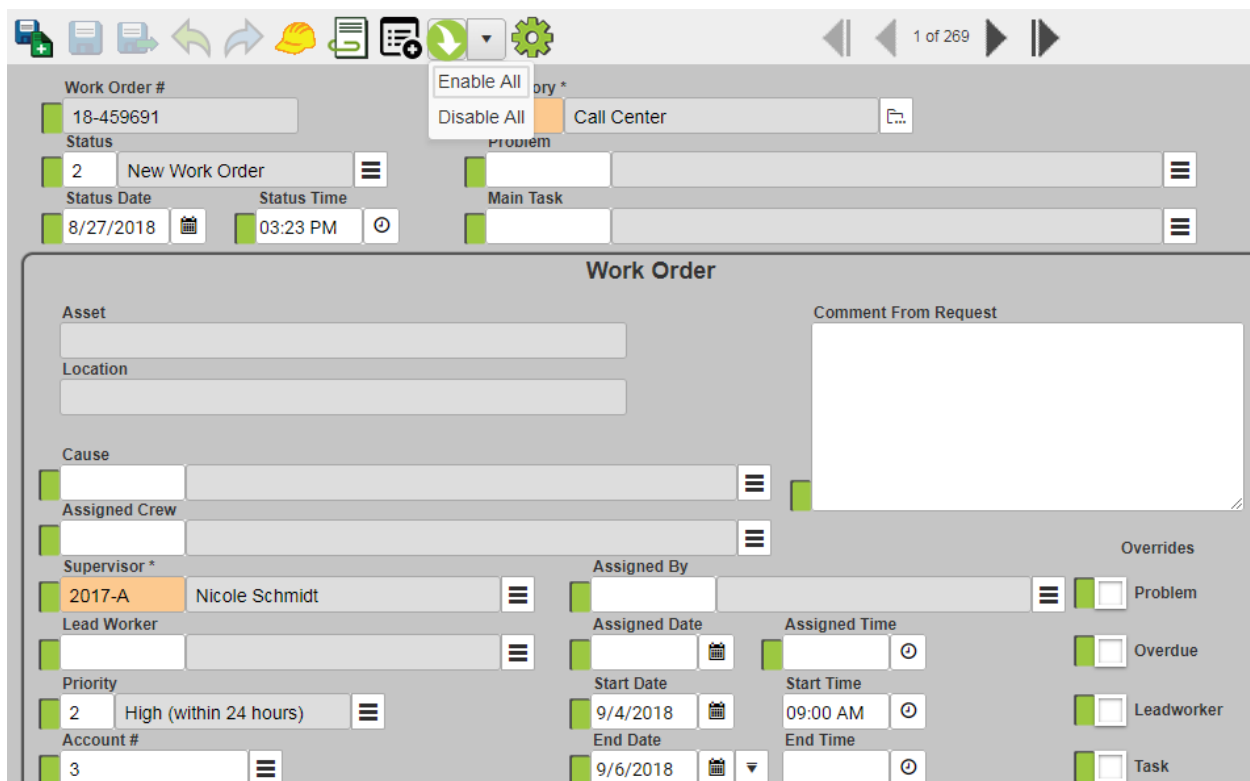
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Errors Button

Similar to the older ASP.NET errors button, this will show any active problems on the form that may prevent you from saving. It first will show all server-side requirements that are not met (such as global required fields, or areas where the rules are broken such as if the end date is before the start date). If it meets all server validations, it will show any form level validations which are not met (form level required fields).

If there are no errors, the button is hidden.

Carry Over Button Improvements (2018r2)

Users have a new dropdown menu to turn all on or all off.

Admin tip: You can remove the carry over button on a property by property basis. Note Start and End Time in the above form.

Field Details Button

All forms have a new field details button. All users have access to this button in Lucity 2018r2. When toggled it enables a form details button next to each field.

Click the button next to the field to get basic field details. This is great for building filters in dashboards, report writers, or just getting a quick peek at what a field/property contains. The text in this draggable dialog can be selected and copied with CTRL+C.

New Create Work Order Button

Available by default on every form that supports creating work orders. If you removed the create work order button from the source grid, it will not show up in the form.   Can be removed from forms.

New Attach Document Button

Available by default on every form that supports attaching documents. If you removed the documents from the source grid, it will not show up in the form. Can be removed from forms.
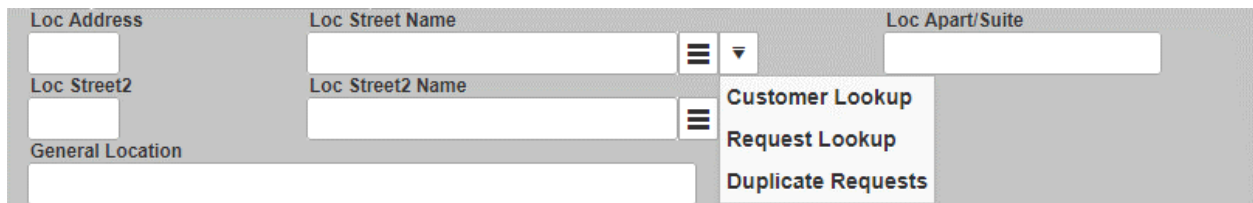
Form Functions

Historically we have used F function keys to trigger behaviors on forms. As we transition to a workforce that is using more interfaces without a keyboard, we are moving away from designs which focus on the F keys. We have a new concept for form functions which we believe is more intuitive than an F key functionality. Field with special functionalities which may be triggered will have a new button dropdown arrow: ▾

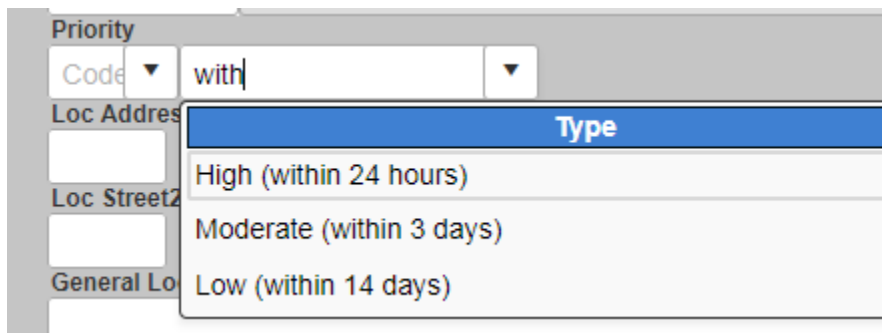This will display a menu of special functions available on the field.

Requests has quite a few of these in support of all of the various request special lookup functions:

Auto Complete in picklists

Auto-complete is available in picklists across the board now. If you start typing, it will search for codes or values that contain the text you entered.

For code type picklists, you can leverage this on both the code portion and the type portion.

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