

## **Self-Help Guide**

# **Jadu Central: Create Online Forms**

This self-help guide takes you through the process of creating a form in Jadu Central, setting up the page elements (such as text fields, drop downs check boxes) and the corresponding properties, and managing the submitted forms

## **Getting Started**

### **Choose the Right Forms Tool**

#### **Compare Tools for Building an Online Form**

There are a few UMN-supported tools you can use to create online form (Google Forms, Jadu Forms, ServiceNow and Workflow Gen). Choose the best one for your needs.

Compare Tools for Building an Online Form

[/comparison/compare-options-building-online-form](#)

### **Learn about Access and Support**

#### **Access Jadu Central**

New User - I Need Jadu Central (Forms) Only

[/services-technologies/how-tos/jadu-new-user-i-need-jadu-central-forms](#)

I need both Jadu Central and Jadu Connect

[https://it.umn.edu/services-technologies/how-tos/jadu-new-user-i-need-both-xfp-...](#)

Submit a Subcategory or Storage Request

</services-technologies/how-tos/jadu-forms-submit-subcategory-or-storage>

Login to the Form Building Environment

<https://z.umn.edu/JaduFormBuilder>

Use your Jadu Central username and password.

Login to Production to View Submitted Forms

<https://z.umn.edu/JaduFormProduction>

## **Get Help**

Technology Help

<https://it.umn.edu/technology-help-our-staff>

To get help with Jadu Forms contact Technology Help at 612-301-4357 or [help@umn.edu](mailto:help@umn.edu)

Attend a Working Lab

<https://calendar.google.com/calendar/selfsched?sstoken=UUxyQW5jUFhVUzk2fGRlZmF1...>

A time to ask questions and to work on your own project. Members of the Jadu support team are available for one-on-one help.

## **Learn about Accessibility and Usability**

### **Create Accessible Forms**

Accessible U

<https://accessibility.umn.edu/>

Learn about the core skills for making your content accessible.

Jadu Forms: Accessibility

</services-technologies/how-tos/jadu-forms-accessibility>

Learn about how Jadu supports the accessibility of your forms.

Use an Accessibility Checker

</services-technologies/how-tos/jadu-central-checking-accessibility>

### **Design for Usability**

Form Design Recommendations

<https://www.nngroup.com/articles/web-form-design/>

Design guidelines to ensure users can successfully complete your online forms.

# Create a Jadu Central Form

## Create a Basic Form

### Create a New Form

Understand Jadu Terminology and Form Structure

</services-technologies/how-tos/jadu-central-understand-jadu-terminology>

UMN Form Requirements

<https://it.umn.edu/jadu-forms-umn-form-requirements>

Create a Form (video 3m 55s)

<https://youtu.be/FYzOTUxDJAI>

Assign Categories

[https://docs.jadu.net/central/content-management/creating\\_content/categories#ap...](https://docs.jadu.net/central/content-management/creating_content/categories#ap...)

Note: UMN Jadu users will be assigned a single category to use for all their forms. You will still need to select that category.

Assign Metadata

[https://docs.jadu.net/central/content-management/creating\\_content/metadata](https://docs.jadu.net/central/content-management/creating_content/metadata)

Require Login (optional)

<https://www.jadu.net/support/manuals/xfp/working-with-forms/form-settings/regist...>

Note: If you want to restrict your form to only those with a UMN Internet ID, turn on this setting.

Add ReCAPTCHA

</services-technologies/how-tos/jadu-central-enable-recaptcha>

Note: ReCAPTCHA should be used if you are not requiring a login for your form.

Set Form Reentry Settings (optional)

</services-technologies/how-tos/jadu-central-set-form-reentry-settings>

Set Progress Bar Display (optional)

<https://docs.jadu.net/central/form-management/forms/#form-fields:~:text=the%20t...>

Create Form Instructions Page (optional)

<https://docs.jadu.net/central/form-management/forms/templates/instructions>

### Create and Add Pages to a Form

Pages enable you to arrange your form so that the user only sees one section of the form at a time. You can add an instructions page at the beginning of the form, as well as page instructions at the beginning of each page.

Create a Page and Add it to a Form (video 6m 10s)

<https://youtu.be/IKzLB3bOILk>

Create a New Page

</services-technologies/how-tos/jadu-central-create-new-page-template>

Set Page Title

<https://docs.jadu.net/central/form-management/forms/templates/#changing-the-tit...>

Note: UMN standard is to name new pages with your category prefix.

Add Page to Form

<https://docs.jadu.net/central/form-management/forms/templates/#creating-a-new-p...>

Add Page Instructions (optional)

<https://docs.jadu.net/central/form-management/forms/templates/instructions>

## **Add Elements (a.k.a. Fields, Questions) to a Page**

The terms "elements," "fields" and "questions" are used interchangeably in Jadu Forms.

Add an Element to a Page

<https://docs.jadu.net/central/form-management/forms/templates/elements/>

Update an Element

<https://docs.jadu.net/central/form-management/forms/templates/questions#updatin...>

Remove an Element

<https://docs.jadu.net/central/form-management/forms/templates/questions#removin...>

Overview of Jadu Page Elements

</services-technologies/how-tos/jadu-central-overview-page-elements>

File Upload Considerations

</services-technologies/how-tos/jadu-central-file-upload-considerations>

## **Actions on a Submitted Form**

## Create and Add Actions to a Rule

Understand Rules and Actions

</services-technologies/how-tos/jadu-central-understand-rules-actions>

Choose an Action Template Type

</services-technologies/how-tos/jadu-central-choose-action-template-type>

Manage Action Templates

[https://docs.jadu.net/central/form-management/forms/rules\\_and\\_actions/actions/](https://docs.jadu.net/central/form-management/forms/rules_and_actions/actions/)

Add Form Data to an Action Template

</services-technologies/how-tos/jadu-central-add-form-data-action>

Build A Rule

[https://docs.jadu.net/central/form-management/forms/rules\\_and\\_actions/#what-is-...](https://docs.jadu.net/central/form-management/forms/rules_and_actions/#what-is-...)

Add a Rule and an Action Template (video 5m 38s)

<https://youtu.be/XWYHeqNGqgs>

Guidelines for Building Rules

</services-technologies/how-tos/jadu-central-guidelines-building-rules>

## Types of Actions

Show Content On Form Completion

[https://docs.jadu.net/central/form-management/forms/rules\\_and\\_actions/actions/c...](https://docs.jadu.net/central/form-management/forms/rules_and_actions/actions/c...)

Show a custom page after a form has been submitted.

Send Email

</services-technologies/how-tos/jadu-central-send-email>

Send a custom email to one or many recipients.

Export as File

</services-technologies/how-tos/jadu-central-exporting-file-form>

Send a CSV or XML file containing submitted form data via SFTP or SCP

Create PDF of Submission

</services-technologies/how-tos/jadu-central-create-pdf-form-submission>

Map submitted form data to a form-fillable PDF.

Perceptive Content - Submit Data

</services-technologies/how-tos/jadu-central-send-pdf-perceptive-content>

Send a PDF to Perceptive Content (The "Create PDF of Submission" action is required to be run first.)

## Publish and Test a Form

## **Test in the Form Building Environment**

View and Test a Form in the Form Building Environment

</services-technologies/how-tos/jadu-central-view-test-form-in-form>

Test Your Form on a Mobile Simulator

</services-technologies/how-tos/jadu-central-test-your-form-mobile>

## **Move Form to Production Environment (Go Live)**

Production Readiness Checklist

</services-technologies/how-tos/jadu-central-production-readiness>

Request to Move a Form to Production

</services-technologies/how-tos/jadu-forms-request-move-form-production>

Publish a Z Link to Access your Jadu Form

</services-technologies/how-tos/jadu-central-use-z-link-access-your-form>

# **Advanced Features and Data**

## **Optional Advanced Features**

### **Prefills and Logic**

Logic and Prefills Overview

</services-technologies/how-tos/jadu-central-logic-prefills-overview>

Create Logic in a Form

</services-technologies/how-tos/jadu-central-logic-in-form>

Predefined Logic Documentation

</services-technologies/how-tos/jadu-central-predefined-logic>

Create Prefills

<https://docs.jadu.net/central/form-management/forms/prefills/>

### **Integrations**

Overview of Data Integrations

</services-technologies/how-tos/jadu-central-overview-data-integrations>

Integrated Components Documentation

</services-technologies/how-tos/jadu-central-integrated-components>

## **Conditional Sections**

Hide or Display a Section Based on Logic

<https://docs.jadu.net/central/form-management/forms/branching>

## **Access and Store Data**

### **Data from Form Submissions**

View Received Forms and Attachments

<https://docs.jadu.net/central/form-management/forms/received-forms>

Note: Form data will only be stored in Jadu for 3 months.

### **Data Retention**

Data will be retained in Jadu for three months. All form data will need to be transferred to another location.

### **Export Data from Jadu Central**

Download PDF

<https://docs.jadu.net/central/form-management/forms/received-forms#downloading-...>

Export to SFTP

</services-technologies/how-tos/jadu-central-exporting-file-form>

### **Data Security**

Protect U of M Data

<https://it.umn.edu/good-practice/know-your-data-how-protect-university>

Note: Jadu accepts medium security level data. Jadu is not approved for HIPAA data storage.