University of Minnesota

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, and Jadu Forms). 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 Jadu Central with your UMN Credentials
/services-technologies/how-tos/jadu-central-sign-control-center
Sign in Links
https://it.umn.edu/services-technologies/jadu-forms

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
Attend a Working Lab
https://z.umn.edu/JaduWorkingLab
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
/services-technologies/how-tos/jadu-central-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...
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
Require Login (optional)
https://www.jadu.net/support/manuals/xfp/working-with-forms/form-settings/regis...
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/lKzLB3bOILk
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/
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-…
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…
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
Predefined Logic Documentation
/services-technologies/how-tos/jadu-central-predefined-logic

Conditional Sections

Hide or Display a Section Based on Logic
https://docs.jadu.net/central/form-management/forms/branching

Managing Email Recipients

Overview of Managing Email Recipients for Test vs Production Use
/services-technologies/how-tos/jadu-forms-manage-different-email
(Method 1) Emails Chosen by Form Submitter
/services-technologies/how-tos/jadu-forms-set-email-recipients-0
(Method 2) Emails Defined by Form Builder
/services-technologies/how-tos/jadu-forms-set-email-recipients

Working with Email Attachments

Attach a User-Uploaded File to an Email
/services-technologies/how-tos/jadu-forms-attach-user-uploaded-file
This will attach all files from a user upload (attachment) field to an email
Generate & Attach a Simple PDF of Submitted Form Data to an Email
/services-technologies/how-tos/jadu-forms-generate-attach-simple-pdf
This method will generate a PDF with limited formatting options
Generate & Attach a Custom PDF (designed as a fillable PDF) w/Form Data to an E…
/services-technologies/how-tos/jadu-forms-attach-custom-pdf-form-data
This method will generate a PDF with more advanced formatting and design options

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
Send Form Submission Data to Google Sheet
/services-technologies/how-tos/jadu-forms-send-form-submission-data

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.