

Self-Help Guide

Jadu XFP: Create Online Forms

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

Jadu XFP is also known as *Jadu XForms Professional* and *Jadu XForms Pro*.

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 Forms

New User - I Need XFP Only

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

I need both XFP and CXM

<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 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

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

</jadu-forms-accessibility>

Learn about how Jadu supports the accessibility of your forms.

Use an Accessibility Checker

</jadu-forms-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 Form

Create a Basic Form

Create a New Form

Understand Jadu Terminology and Form Structure

[/jadu-forms-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://www.jadu.net/support/manuals/xfp/working-with-forms/form-settings/categ...>

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

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

<https://it.umn.edu/services-technologies/how-tos/jadu-forms-enable-recaptcha>

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

Set Form Reentry Settings (optional)

<https://it.umn.edu/jadu-forms-set-form-reentry-settings>

Set Progress Bar Display (optional)

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

Create Form Instructions Page (optional)

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

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

<https://it.umn.edu/jadu-forms-create-new-page>

Note: Always create form-specific pages.

Set Page Title

<https://www.jadu.net/support/manuals/xfp/working-with-pages/changing-title.html>

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

Add Page to Form

<https://it.umn.edu/jadu-forms-add-page-your-form>

Important: You must use only form-specific pages.

Add Page Instructions (optional)

<https://www.jadu.net/support/manuals/xfp/working-with-pages/page-instructions.h...>

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://www.jadu.net/support/manuals/xfp/working-with-pages/add-question.html>

Update an Element

<https://www.jadu.net/support/manuals/xfp/working-with-pages/update-question.html>

Remove an Element

<https://www.jadu.net/support/manuals/xfp/working-with-pages/remove-question.html>

Overview of Jadu Page Elements

</jadu-forms-overview-page-elements>

Actions on a Submitted Form

Create and Add Actions to a Rule

Understand Rules and Actions

<https://it.umn.edu/jadu-forms-understand-rules-actions>

Choose an Action Template Type

<https://it.umn.edu/jadu-forms-choose-action-template-type>

Manage Action Templates

<https://www.jadu.net/support/manuals/xfp/rules/managing-templates.html>

Add Form Data to an Action Template

<https://it.umn.edu/jadu-forms-add-form-data-action-template>

Build A Rule

<https://www.jadu.net/support/manuals/xfp/rules/building-a-rule.html>

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

<https://youtu.be/XWYHeqNGqgs>

Guidelines for Building Rules

<https://it.umn.edu/jadu-forms-guidelines-building-rules>

Types of Actions

Show Content On Form Completion

<https://www.jadu.net/support/manuals/xfp/rules/actions/complete-page/add.html>

Show a custom page after a form has been submitted.

Send Email

<https://it.umn.edu/jadu-forms-send-email>

Send a custom email to one or many recipients.

Export as File

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

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

Create PDF of Submission

<https://it.umn.edu/jadu-forms-create-pdf-form-submission>

Map submitted form data to a form-fillable PDF.

Perceptive Content - Submit Data

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

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

Test Your Form on a Mobile Simulator

</jadu-forms-test-your-form-mobile>

Move Form to Production Environment (Go Live)

Production Readiness Checklist

<https://it.umn.edu/jadu-forms-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

<https://it.umn.edu/jadu-forms-use-z-link-access-your-form>

Advanced Features and Data

Optional Advanced Features

Prefills and Logic

Logic and Prefills Overview

<https://it.umn.edu/jadu-forms-logic-prefills-overview>

Create Logic in a Form

</jadu-forms-logic-in-form>

Predefined Logic Documentation

<https://it.umn.edu/jadu-forms-predefined-logic>

Create Prefills

<https://www.jadu.net/support/manuals/xfp/using-advanced-features/prefills/addin...>

Integrations

Overview of Data Integrations

</jadu-forms-overview-data-integrations>

Integrated Components Documentation

</jadu-forms-integrated-components>

Conditional Sections

Hide or Display a Section Based on Logic

<https://www.jadu.net/support/manuals/xfp/working-with-pages/page-elements/in-pa...>

Access and Store Data

Data from Form Submissions

View Received Forms and Attachments

<https://www.jadu.net/support/manuals/xfp/received/overview.html>

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

Download PDF

<https://www.jadu.net/support/manuals/xfp/received/download-pdf.html>

Export to SFTP

</jadu-forms-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.