

Course Registration – How to Set-up Forms

<i>Speech</i>	<i>Cursor Actions</i>
<p>When a student registers for a course, you often need to collect other details about the registrant.</p> <p>For example, you may want to collect medical information about allergies or medical alerts . Other common examples are a Release Form, or an Emergency Contact form so that you know who to contact if there is ever an emergency with that student.</p>	Show image listing the different types of forms they may collect.
<p>Sumac supports this need by allowing you to set up forms for any of these scenarios. You can fill in these forms when registering a student manually. If you have integrated Sumac with your website, students can fill in their own forms while registering online.</p>	
	Show title: Setting up Forms
<p>In your Sumac console, click Utilities, Customize Database, and Lookup Lists.</p>	Show console. Expand Utilities, Customize Database, Lookup Lists.
<p>Choose the Area: Forms,</p>	Choose Area: Forms
<p>Then select the Lookup List: Form Definitions.</p>	Select Lookup List: Form Definitions
<p>Click New to create a new Form.</p>	Click New.
<p>First, give the form a name, both singular and plural. This name appears in the user interface, both for Sumac itself and, if the form is available online, also in your website.</p>	<p>In Name (Singular), enter “Medical Alert”</p> <p>In Name (Plural), enter “Medical Alerts”</p>
<p>If you will allow registrants to fill in this form without completing it in full, put a check mark next to “Allow Partial Completion.”</p>	Put a check mark in “Allow Partial Completion”
<p>If the student should only be able to fill in this form once, put a check mark next to “One Per Contact.”</p>	Point to “One Per Contact”
<p>This check mark tells Sumac to display this form on your website.</p>	Put check mark in “Show on Web”
<p>If you want to allow students to edit this form later on through your website, put a check mark here.</p>	Point to “Allow Web User to Edit”
<p>Choose a template if you want Sumac to automatically send an email to someone who fills out this form on your website.</p>	Point to template field
<p>If you want an additional description of this form, perhaps help for filling it out, to be presented to students on the website, enter the description here.</p>	Point to “Description on Web”

Now begin adding fields. Typically, the first field in the form would hold the name of the contact who has entered the form, but you do not have to specify a field for the contact's name. Sumac forms are always connected to a contact, so Sumac automatically adds that field for you.	
Most medical alert forms have fields for birth date, gender and other demographic details. In Sumac, these pieces of information are stored in the contact record for the student, so you don't need to add fields for those items.	
Instead, let's specify that the first field in this form will ask whether or not the student has any allergies.	
Click "Add" to add the first field to the form.	Click "Add"
Let's make this a check box. In Sumac, a field that can be either true or false is called a "flag". Under "Internal Field Name," select a Flag field.	Internal Field Name = Flag
Specify the Visible Name for this field.	In Visible Name, enter "Do you have any allergies?"
Since we want this to be the first field on our form, set an Entry Order of 1, then click OK to save this field to the Form.	Entry Order = 1. Click OK
Next, we should add a notes field in which students can enter the details of their allergies, if they have any. Click "Add" to add another field.	Click "Add"
Let's make this a Long Text field so that students have lots of space to enter their list of allergies and their reactions.	Internal Field Name = Long Text Visible Name = "List of Allergies/Reactions"
For the first field in our form, we specified an entry order of 1. However, for the second field in the form, specify an entry order of 5. We recommend spacing out entry orders in increments of 5 or 10. Later if you need to add new fields to this form, you can easily insert those new fields wherever you like, without having to change the entry orders of other fields.	Entry Order = 5
Click OK to save this field.	Click OK.
Perhaps there are other high priority medical conditions you want your students to identify in this form. For example, perhaps you need to draw particular attention to Diabetes, Celiac's Disease or Asthma because those conditions have dietary or other physical restrictions associated with them.	Click "Add"
You could list these high priority conditions in a group of check boxes, just in case some students have more than one of these conditions.	

A group of check boxes is defined using a text field,	Internal Field Name = Text Visible Name = "Do you have any of the following medical conditions?"
Then use the Formula or Checkbox Choices area to list these conditions. Enter the check box choices, separating each of them with a semi-colon.	Checkbox Choices: Type 1 Diabetes; Type 2 Diabetes; Celiac's Disease; Asthma; Other
Specify that you want the text field as a check box group.	Put check mark in "Show text as check box group"
Give this field an Entry Order of 10, then click OK to save it.	Entry Order = 10, click OK
Now create another long text field where the student can enter any other medical alert details, if necessary.	Click "Add" Internal Field = Long Text Visible Name = "Other Medical Alert Details" Entry Order = 15 Click OK
Add a field to inquire whether or not the student is taking any required medication. Let's make it a check box group so the student has to select one of two options: yes or no.	Click "Add" Internal Field Name = Text Visible Name = "Is medication required?" Check box Choices = Yes; No Entry Order = 20 Put check mark in "Show text as check box group"
And let's make this field mandatory. That way, the student will not be able to save this form without answering this question.	Put check mark next to Mandatory Click OK
We should also add a Long Text field so the student can list any medication regimens your staff should be aware of.	Click "Add" Internal Field Name = Long Text Visible Name = "If Yes, list any medications" Entry Order = 25 Click OK
Continue these steps until you have specified all the fields you want to appear in your form. Once you are done, click OK to save all these fields to your form.	Click OK
<i>You should now move on to Sumac's other how-to videos to learn more about setting up Course Registrations in Sumac!</i>	