**Training Sessions**

**nFORM 4.9 Training**

**EXERCISE WORKBOOK**

**This exercise workbook accompanies the Windsor nFORM version 4.9 live online training. The exercises in this book are intended to be completed during the virtual training sessions.**

 **Access to all pre-recorded content will be provided as part of the training documentation.**

**FORM DESIGNER TRAINING**

*TAGGING: No spaces, no special characters, use abbreviations when possible, try to keep it under 30 characters, use underscores to separate objects, names etc.*

# Video Link :[Exercise 1 - Create, Preview, Publish.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%201%20-%20Create%2C%20Preview%2C%20Publish.mp4?version=1&modificationDate=1595534242733&api=v2) Video length: 11:15 min

Exercise time: 15:00 min

# After video exercise:

1. **Log-in to your nFORM environment –**
	1. <https://nformtest.windsorsolutions.biz/OKDEQ/> [ ]
2. **Navigate to the Forms Manager** [ ]
3. **Add a new form to the TRAINING organization** [ ]
4. **Name the form – use something you can find again**
	1. **Write the name here \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **Add the minimum amount of metadata information to the form**
	1. **What did you add? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
6. **Add one section**
	1. **What did you name your Section? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **What was the TAG? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]

*TAGGING: Remember to be consistent – Use no spaces, no special characters, use abbreviations when possible, try to keep it under 30 characters, use underscores to separate objects, names etc.*

1. **Add one control**
	1. **What type of Control did you choose? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **What was the TAG? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
2. **Preview your form** [ ]
3. **Publish your form** [ ]

Video Link : [Exercise 2 - Intro Simple Controls.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%202%20-%20Intro%20Simple%20Controls.mp4?version=1&modificationDate=1595534247897&api=v2) Video length: 21:45 min

Exercise time: 15:00 min

# After video exercise:

1. **Navigate to the Forms Manager** [ ]
2. **Find the form created in Exercise #1** [ ]
3. **Create a form version 1.1 - Draft**
	1. **What Tab did you need to click on? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **Add one of Every Simple Control**
	1. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	3. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	4. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	5. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	6. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]

*TAGGING: No spaces, no special characters, use abbreviations when possible, try to keep it under 30 characters, use underscores to separate objects, names etc.*

1. **Preview your form** [ ]
2. **Publish your form as Version 2.0** [ ]

Video Link : [Exercise 3 - Section Maintenance.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%203%20-%20Section%20Maintenance.mp4?version=1&modificationDate=1595534259363&api=v2) Video length: 5:01 min Exercise time: 15:00 min

# After video exercise:

1. **Navigate to the Forms Manager and find your form** [ ]
2. **Create a form version 2.1 - Draft**[ ]
3. **Add a New Section that mirrors the existing section** [ ]
4. **Rename the new section**
	1. **What is the new Section Name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
	2. **What is the new Section Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **Remove several Controls from each sections to remove possible duplicates** [ ]
6. **Reverse the Section Order** [ ]
7. **Preview your form** [ ]
8. **Publish your form as Version 2.1 - Published** [ ]

Video Link : [Exercise 4 - Intro Formatted Controls.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%204%20-%20Intro%20Formatted%20Controls.mp4?version=1&modificationDate=1595534262150&api=v2) Video length: 7:17 min

Exercise time: 15:00 min

# After video exercise:

1. **Create a form version 2.2 - Draft**[ ]
2. **Add a New Section for Formatted Controls to go in** [ ]
3. **What is the new Section Name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **What is the new Section Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **Add one of Every Formatted Control**
	1. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	3. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	4. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	5. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	6. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
6. **Test formatted control validation (PREVIEW)** [ ]
7. **Publish your form as Version 3.0** [ ]

Video Link : [Exercise 5 - Intro Advanced Controls.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%205%20-%20Intro%20Advanced%20Controls.mp4?version=1&modificationDate=1595534265617&api=v2) Video length: 16:48 min

Exercise time: 30:00 min

# After video exercise:

1. **Create a form version 3.1 - Draft**[ ]
2. **Add a New Section for Advanced Controls to go in**
3. **What is the new Section Name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **What is the new Section Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **Add one of Every Advanced Control**
	1. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	3. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	4. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	5. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	6. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	7. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	8. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	9. **Control Type? \_\_\_\_\_\_\_\_\_\_\_\_Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
6. **Review your work**
	1. **What did you put in your table? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
7. **Publish your form as Version 4.0** [ ]

Video Link : [Exercise 6 - Advanced Design Features Part 1.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%206%20-%20Advanced%20Design%20Features%20Part%201.mp4?version=2&modificationDate=1600203420347&api=v2) Video length: 13:19 min

Exercise time: 10:00 min

# After video exercise:

1. **Create a form version 4.1 - Draft**[ ]
2. **Add a repeating section for tracking contacts –**
	1. **What did you name the Section? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **What did you set the Section TAG to? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a simple text control to the contact section to collect the contact name…**
	1. **What did you name the Control? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
	2. **What did you name the Control TAG? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **Dynamically name the repeating Section. Use the Contact Name tag**
	1. **Contact Name Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
5. **Add a single select radio button Control (Y/N) to Your Top Section**
	1. **Top Section Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Control name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
6. **Add a multi-select checkbox control to your Second Section**
	1. **Section: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Control name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
7. **Make your multi-select control above conditional on your new Y/N control (Step 5)**
	1. **Control Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Control Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Conditional Logic: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
8. **Make a 3rd Section conditional on your multi-select above (Step 6)**
	1. **Section: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Section Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Conditional Logic: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
9. **Make your multi-select control above conditional on your new Y/N control (Step 5)**
	1. **Control Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Control Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Conditional Logic: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
10. **Preview and verify Repeater naming and Conditionality is working** [ ]
11. **Publish your form as Version 5.0** [ ]

Video Link : [Exercise 7 - Advanced Design Features Part 2.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%207%20-%20Advanced%20Design%20Features%20Part%202.mp4?version=1&modificationDate=1595534287433&api=v2) Video length: 6:48 min

Exercise time: 10:00 min

# After video exercise:

1. **Create a form version 5.1 - Draft**[ ]
2. **Move the repeating Contacts section (Exercise 6 Question #2) above another section:**
	1. **What Section Tag is now above? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What Section Tag is now below? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a Single Select control to the below Section to collect a name**
	1. **What did you name the Control? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What did you name the Control TAG? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Use the repeating Contact list to populate this new control list**
		1. **Unique Key Field \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		2. **Selection Display Value Formula\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
4. **Dynamically name the repeater items by using the Contact Name tag**
	1. **What Section Tag did you add it to? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What type of Control did you select? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **What did you name the control? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	4. **What is the Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	5. **Which Dynamic Data did you pick? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
5. **Preview and fix any issues** [ ]
6. **Publish your form as Version 5.1** [ ]

Video Link : [Exercise 8 - Calculations And Table Controls.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%208%20-%20Calculations%20And%20Table%20Controls.mp4?version=1&modificationDate=1595534293403&api=v2) Video length: 9:17 min

Exercise time: 10:00 min

# After video exercise:

1. **Create a form version 5.2 – Draft**
2. **Add a New Section for tracking Calculations**
	1. **Section Name? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Section Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a New Advanced Table Control called “Pricing List”**
	1. **Control Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Add a column for Item Name**
		1. **Tag \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Add a column for Item Price**
		1. **Tag \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	4. **Add a column for Quantity Sold with SUM**
		1. **Tag \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	5. **Add a column for Earnings with SUM – have it be calculated**
		1. **Tag \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		2. **Calculated Value Formula \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
4. **Preview and Publish as version 6.0**[ ]

Video Link : [Exercise 9 - Form Attributes Part 1.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%209%20-%20Form%20Attributes%20Part%201.mp4?version=1&modificationDate=1595534296100&api=v2) Video length: 12:39 min

Exercise time: 15:00 min

# After video exercise:

1. **Create a form version 6.1 – Draft**
2. **Add some search keywords and a tag to your form**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Form Tag? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **What keywords? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a short description and use an Alternative Identifier**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What Alternative ID Control? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** [ ]
4. **Add a Mail-In Download Option for your form (select a document of your choice to attach)**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What type of document was it? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
5. **Generate a Copy of Record for all submissions and make sure the user has to review before submitting**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
6. **In PREVIEW, download a Mail-In Form** [ ]
7. **Publish version 7.0** [ ]
8. **From nFORM Home Page use a Keyword to find your form** [ ]

Video Link : [Exercise 10 - Form Attributes Part 2.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%2010%20-%20Form%20Attributes%20Part%202.mp4?version=1&modificationDate=1595534302583&api=v2) Video length: 9:04 min

Exercise time: 15:00 min

# After video exercise:

1. **Create a form version 7.1 – Draft**
2. **Add an Online Only fee for Form Submission – The fee minimum must be $10 and the maximum fee can’t be more than $50. Calculate it based on a number control in your form.**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What did you have to update?**
		1. **PAYMENT PROCESSING = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		2. **FEE SCHEDULE = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		3. **MINIMUM THRESHOLD = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		4. **MAXIMUM THRESHOLD = \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
		5. **CALCULATION =\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a Phone Contact**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **Where does it show up? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
4. **Add two Internal Controls for tracking the submission Applicant Number and Date Application Received**
	1. **What TAB did you need to click? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	2. **What did you label the two Controls? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
	3. **Who fills this out, and Where might we see this data? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
5. **Resolve any issues and Preview and Publish version 7.1**

Video Link : [Exercise 11 - Workflow Steps.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204-9%20-%20Form%20Designer%20Training%20-%20Exercise%2011%20-%20Workflow%20Steps.mp4?version=1&modificationDate=1595534306030&api=v2) Video length: 15:02 min

Exercise time: 10:00 min

# After video exercise:

1. **Create a form version 7.2 – Draft** [ ]
2. **When the form is submitted, make it automatically go to IN REVIEW Status. How? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
3. **Add a step to the process that notifies the submitter of your decision. How? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
4. **Add a step where the Supervisor reviews all submissions. How? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**[ ]
5. **Move the Supervisory Review step to Step 2.** [ ]
6. **Publish Version 8.0** [ ]

Video Link : [nFORM 4.9 Form Designer Training - Exercise 12 Submission Signatures.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204.9%20Form%20Designer%20Training%20-%20Exercise%2012%20Submission%20Signatures.mp4?version=1&modificationDate=1603831222087&api=v2)

Video length: 16:09 min Exercise time: 10:00 min

# After video exercise:

Note – You must have electronic signature rights to complete these exercises

**Answer your challenge questions**

* Open your profile
* Choose option to address challenge questions
* Create answers
1. **Find and set your form to draft**
2. **Set your form to require an electronic signature**
3. **Set it to require a digital signature**
	1. **Add a certification statement**
	2. **Preview and sign digitally**
4. **Invite someone else to sign**
	1. **Enable signing invitations**
	2. **Preview**
5. **Now invite several people to sign**
	1. **and preview**
6. **Now add some specific roles**
	1. **Add several roles (maybe an engineer, a finance officer, and a responsible official)**
	2. **& preview this form**

Video Link : [nFORM 4.9 Form Designer - Document Template Training - Exercise 1 - Template Basics.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204.9%20Form%20Designer%20-%20Document%20Template%20Training%20-%20Exercise%201%20-%20Template%20Basics.mp4?version=1&modificationDate=1603831271510&api=v2)

Video length: 9:19 min Exercise time: 10:00 min

# After video exercise:

1. **Create a License template**
2. **Open Word**
3. **Add some static text. Something like “This is your <SUBJECT> License” and perhaps a logo**
4. **Name the document & save**
5. **Open your form (remove any electronic signature requirements)**
6. **Add the template**
7. **Go to workflow steps**
8. **Add a step to generate the document**
9. **Preview**

Video Link : [nFORM 4.9 Form Designer - Document Template Training - Exercise 2 - Static and Dynamic Data.mp4](https://wiki.windsorsolutions.biz/download/attachments/35521032/nFORM%204.9%20Form%20Designer%20-%20Document%20Template%20Training%20-%20Exercise%202%20-%20Static%20and%20Dynamic%20Data.mp4?version=1&modificationDate=1603831310600&api=v2)

Video length: 9:19 min Exercise time: 10:00 min

# After video exercise:

1. **After watching the video**
2. **Find and open your template**
3. **Add some additional details**
	1. **Add the submission date**
	2. **Add the name of the form**
4. **Save your template**
5. **Open your form**
6. **Replace the template**
7. **Preview**

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