Form use in external resource helper

resource list page

1. select to create form item from resources

form selection page

2. select form

form item selected

form page

3. fill form

form data filled in and saved

form metadata page

4. form metadata
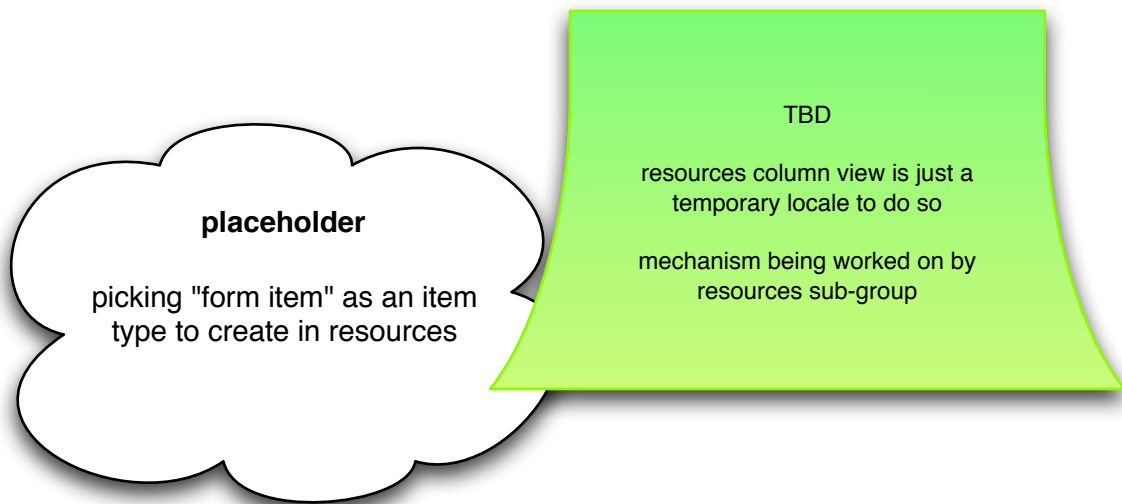
cancel

cancel

cancel

successful submit

areas still being discussed in clouds

box numbers correspond with heading numbers in detailed mockup below (letters entail variations)

Steps 2 and 3 may be combined if feasable

1 - Selecting to create a form from Resources

placeholder

picking "form item" as an item
type to create in resources

TBD

resources column view is just a
temporary locale to do so

mechanism being worked on by
resources sub-group

2 - Selecting Form Type

Resources

Select Form Type

Select Form   Shameful confession ▼   **Select**   **Cancel**

There are 2 main factors here:

1) finding the form type in a potentially crowded field

2) eyeballing the selection to see if it is the right one

In this variation it is a 2 step process, select, and in the next page see and fill - so in this case you would go to section "3 - Filling Out Form" Cancel returns user to previous context

2A - Selecting Form Type

Resources

Select Form Type

Select Form | Shameful confession ▼ | **Select**   **Cancel**

Shameful confession

* Display name   [   ]

⦿ Venial

◯ Capital

When?   [   ] 📅 ➕

In this variation it is a 1 step process, select, and in the **same** page see and fill Cancel returns user to previous context

Juicy details

[   ]

☐ Witnesses?

Save   **Cancel**

Downside

Cannot guarantee state preservation - if a user fills out "Shameful Confession" then reconsiders and selects instead "Glorious triumph" the previous form data will be lost

2B - Selecting Form Type - Control Variations

A - flat (assume that form is displayed below)

Select Form

Shameful confession (Site 345)	▼
Petty triumph (Site 345)	
Unsettling encounter (Site 432)	

Select   **Cancel**

B - categorized by provenance (assume that form is displayed below)

Select Form

Site 345	▼
Shameful confession	
Petty triumph	
Site 432	
Unsettling encounter	

Select   **Cancel**

B - tree based (form is displayed on right)

[+] Regrettable incident

[+] Gastric disturbance

[−] 345

Shameful confession

Petty triumph

[−] 432

Unsettling encounter

Flat by site?
Show form on right
on click

Shameful confession

* Display name

◉ Venial

○ Capital

When?   [📅] [+]

Juicy details

☐ Witnesses?

Save   **Cancel**

Shameful confession

* Display name

Sin type

◉ Venial

○ Capital

When?   [   ] 📅 ➕

Juicy details

[   ]

☐ Witnesses?

Save   **Cancel**

Nothing new here.
Question - will display name label be
something else having to do with the
form type? Something more generic
like "Title"

4 - Filling Out Form Metadata

placeholder

TBD

is metadata needed?

if so - which?

will resources tool in 2.4 allow registered resource item types (like forms) to cherry pick what metadata is wanted?