


Unite Education Program v9.0

Job Aid: 5794

Configure Forms for a FlexApp

For each FlexApp in Unite, you can add forms to the application for candidates to download in .PDF format. Example forms are financial aid forms, dean's certification forms, or residency forms. Each form must have a unique name and instructions. Forms appear in a list grid that you can organize by sorting, filtering, and grouping columns. You can also export the list of forms to an .XLSX file or .PDF file. The steps for configuring a form differ depending on whether you want to add, edit, reorder, or delete the form.


To add a form


1. Open a browser and log on to Unite.
2. On the main menu, click UTILITIES.
3. Click the *Form Design* tab.
4. Verify you are on the *FlexApp* grid.
5. In the **Name** column, click the FlexApp you want to configure.
6. Click the *Application* tab.
7. Click and expand the *Forms* section.
8. Click  .
9. On the *Add Form* window, specify details for the form.

Note

The **Form Name** cannot exceed 60 characters, and the only special characters you can use are the forward slash (/), the dash (-), the underscore (_), the acute e (é), and spaces. Form instructions cannot exceed 150 characters.



Note

Click  to upload a PDF that is under 10MB for candidates to download and complete offline. You can also drag and drop the PDF to the **Form must be in PDF format** area.

10. Click  .
11. Preview the FlexApp and verify your changes.

Note

In the **View** column, click  to preview an individual form.

12. Click  .
13. If you want candidates to attach a completed form to the application, configure a corresponding attachment for the FlexApp.
14. Click  to close the *Edit FlexApp* window.

To edit a form

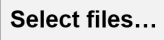
1. Open a browser and log on to Unite.
2. On the main menu, click UTILITIES.
3. Click the *Form Design* tab.
4. Verify you are on the *FlexApp* grid.

5. In the **Name** column, click the FlexApp you want to configure.
6. Click the *Application* tab.
7. Click and expand the *Forms* section.
8. In the **Form Name** column, click the form you want to edit.
9. On the *Edit Form* window, specify details for the form.

Note


The **Form Name** cannot exceed 60 characters, and the only special characters you can use are the forward slash (/), the dash (-), the underscore (_), the acute e (é), and spaces. Form instructions cannot exceed 150 characters.

Note

Click  to upload a PDF that is under 10MB for candidates to download and complete offline. You can also drag and drop the PDF to the **Form must be in PDF format** area.



Note

If you want candidates to attach a completed form to the application, configure a corresponding attachment for the FlexApp.



10. Click  .
11. Preview the FlexApp and verify your changes.

Note

In the **View** column, click  to preview an individual form.



12. Click  .
13. Click  to close the *Edit FlexApp* window.

To reorder a form

1. Open a browser and log on to Unite.
2. On the main menu, click UTILITIES.
3. Click the *Form Design* tab.
4. Verify you are on the *FlexApp* grid.
5. In the **Name** column, click the FlexApp you want to configure.
6. Click the *Application* tab.
7. Click and expand the *Forms* section.
8. In the **Reorder** column, click  to drag and drop each attachment into the preferred position.
9. Click .
10. Preview the FlexApp and verify your changes.



Note

In the **View** column, click  to preview an individual form.

11. Click .
12. Click  to close the *Edit FlexApp* window.



To delete a form

1. Open a browser and log on to Unite.
2. On the main menu, click UTILITIES.
3. Click the *Form Design* tab.

4. Verify you are on the *FlexApp* grid.
5. In the **Name** column, click the FlexApp you want to configure.
6. Click the *Application* tab.
7. Click and expand the *Forms* section.
8. In the **Delete** column, click  for the form you want to remove.
9. Click  to confirm the deletion.
10. Preview the FlexApp and verify your changes.

Note

In the **View** column, click  to preview an individual form.

11. Click .
12. If the FlexApp is configured for candidates to attach a completed form, be sure to delete the corresponding attachment from the FlexApp.
13. Click  to close the *Edit FlexApp* window.

Related resources

- 5771 - Update General Instructions for a FlexApp