



Complye

Form Logic & Form Management Layout

Form Logic Rules, Form Management Folder, Communication Tools,

February 2024



Introduction & Welcome

Thank you to our customers, beta users, & staff who have all provided feedback that we are using to make Complye even better.

Please send future feature suggestions to the Complye, Control, & Scorecard support team at support@clearimpact.com.



Agenda: Upgrade Overview

- **Introduction:**
 - Engagement & Communication
 - Improved Data Entry & Form Editing
- **Form Management Folder**
 - Layout for Survey Forms & Note Type Forms
 - Tabs for Instances, Fields, Logic Rules, Settings, History
- **Form Logic Rules**
 - Creating Rules
 - Editing, Copying, and Archiving rules
 - Usage Examples
- **User Communication Tools**
 - Share Menu & QR Code generator
 - User Confirmation Email
 - Unsaved Changes Warning
 - Alert Templates
- **Refinements & Repairs**
 - Scorecard Feeds to Variable Measures
 - Performance & security improvements
- **Conclusion**
 - Resources & Reminders
 - Questions & Answers



Engagement & Communication

Interactive Forms:

Conditional logic rules can be added to Complye's survey forms and note forms. This will allow you to make responsive forms that change as users enter information so that you can ask questions when and if they are needed.

User Communication Tools:

We are also expanding your user communication tools and simplifying survey management through an improved interface.



Better Data Entry & Form Editing

Form Management Interface:

Complye now has separate tabs for managing different aspects of survey forms and note forms. This simplified interface is intended to make it easier to focus on the form changes you need to make.

Form Logic & Data Entry:

With rules, you can reduce how many fields users see on the forms they use everyday and conditionally require fields only when needed.. This can help ensure that the right information is collected while also streamlining the data entry process.





Form Management Folder for Survey Forms & Note Type Forms



Managing Survey & Note Forms

Form Management Folder

- 1) Redesigned layout with tabbed form folder
- 2) Menus:
 - i. Form Information panel
 - ii. Share and Analyze menus

Tabs

- 1) Instances tab
- 2) Question Fields tab
- 3) Form Logic Rules tab
- 4) Settings tab
- 5) History tab

Benefits: Cleaner, easier to navigate





Sample Fields Sur...

Active

Form Info Panel

- Form type: Survey or Note Type Form
- Frequency: The time period or calendar, such as monthly or annual.
- Responder Types: Participants, Organizations, Anonymous
- Share Survey: Copy link, Get QR Code
- Data Collection Type: The category for the survey form
- Instances: Count of instances or different time periods when information was gathered
- Compylations: Count of analytics reports using this survey form
- Compyle-to-Scorecard Feeds: Count of summary data transfers to Scorecard using data from this form
- System Info: Who created the form. Who last updated it. When it was last edited.

Form info

FORM TYPE

Survey

FREQUENCY

Monthly

RESPONDER TYPES

Participants

SHARE SURVEY

[Copy link](#) 

[QR Code](#) 

DATA COLLECTION TYPE

Feature Education Form

INSTANCES

7

COMPYLATIONS

3

COMPLYE-TO-SCORECARD FEEDS

2

System info

CREATED BY

Rosie Marshall

LAST EDITED

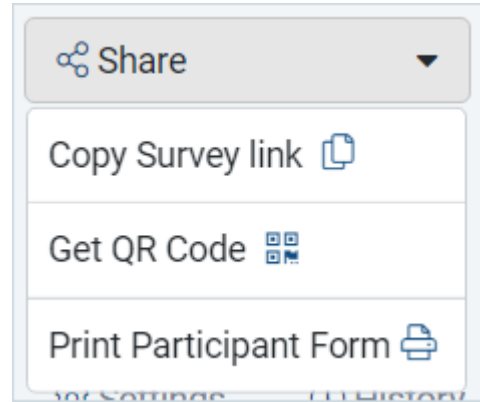
by Rosie Marshall2

01/29/2024 @ 12:57 PM

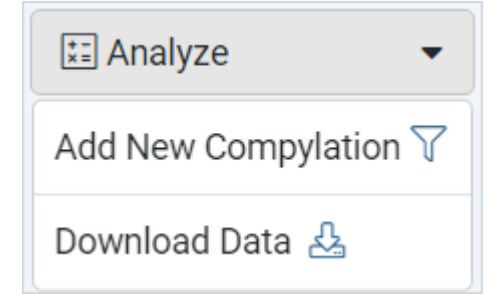
Share Menu & Analyze Menu

Share Menu

Copy Link & QR Code will produce a link to take the survey. This survey level link will automatically start a new instance if one is needed.



Analyze Menu

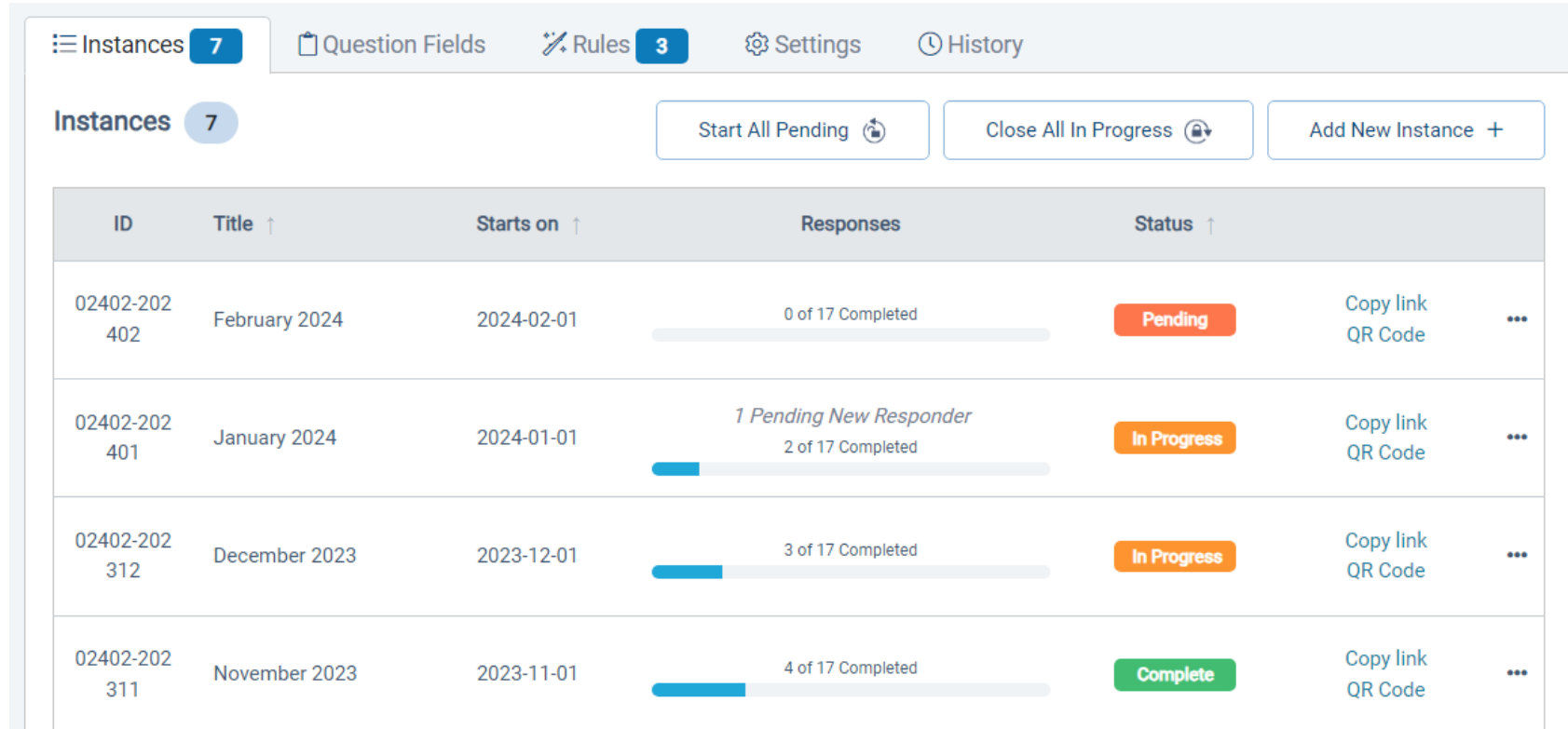


- Once there is at least one completed instance of the form, the Add New Compylation option appears for creating calculations in Analytics.
- Download Data button exports the survey or note form records as a CSV file, which will appear on the Data Collection > My Downloads page.



Instances Tab

- **View** all instances of the survey or note form
- **Add New** instance
- **Start All** Pending instances
- **See Pending Responders** waiting to be accepted before their response displays
- **Close All** in Progress instances



The screenshot displays the 'Instances Tab' interface. At the top, there are navigation tabs: 'Instances' (7), 'Question Fields', 'Rules' (3), 'Settings', and 'History'. Below the tabs, there are three buttons: 'Start All Pending', 'Close All In Progress', and 'Add New Instance +'. The main content is a table with the following columns: ID, Title, Starts on, Responses, and Status. The table lists four instances:

ID	Title ↑	Starts on ↑	Responses	Status ↑
02402-202-402	February 2024	2024-02-01	0 of 17 Completed	Pending
02402-202-401	January 2024	2024-01-01	1 Pending New Responder 2 of 17 Completed	In Progress
02402-202-312	December 2023	2023-12-01	3 of 17 Completed	In Progress
02402-202-311	November 2023	2023-11-01	4 of 17 Completed	Complete



Question Fields Tab

- View all sections and fields present on the form
- Hidden fields are *italicized*
- All sections are expanded for ease of editing whether they are set to closed or expanded for data entry.
- Editing allows you to add, hide, edit, archive, or remove fields and sections. Fields can be reordered.

The screenshot displays the 'Question Fields Tab' interface. At the top, there are navigation tabs: 'Instances' (7), 'Question Fields', 'Rules' (3), 'Settings', and 'History'. Below this, a 'Questions' tab is active, showing 49 questions. An 'Edit Questions' button is visible in the top right. The main content area is titled 'Sample Fields Survey Form 2023' and contains a list of seven fields:

Field ID	Field Name	Field Type
1	Date	Date
2	Multiple Choice (checkboxes) without numeric values	Multiple Choice (Check Boxes)
3	Multiple Choice (checkboxes) with numeric values	Multiple Choice (Check Boxes)
4	Multiple Choice (multiselect) - without numerical values	Multiple Choice (Multiselect)
5	Multiple Choice (multiselect) - with numerical values	Multiple Choice (Multiselect)
6	Number 1	Number
7	Number 2	Number



Settings Tab: Form Settings

The screenshot shows a software interface with a top navigation bar containing 'Instances 7', 'Question Fields', 'Rules 3', 'Settings', and 'History'. The 'Settings' tab is active, displaying a 'Form Settings' dialog box. The dialog box has a title bar with 'Form Settings', 'Cancel', and 'Save' buttons. Inside the dialog, there are four main sections: 'Form Name' with a text input field containing 'Sample Fields Survey Form 2024'; 'Data Collection' with a dropdown menu showing 'Feature Education Form'; 'Description' with a text area containing 'Create one Instance for each Month starting with January 2021 and continuing through 2022'; and 'Make Private' with an unchecked checkbox. At the bottom of the dialog, there are three buttons: 'Archive Form' with a folder icon, 'Delete Form' with a trash can icon, and 'Copy Form' with a document icon.

1. Rename the form
2. Move it to a different Data Collection category
3. Update the description
4. Make it private to restrict viewing responses to administrators
5. Archive it (*Recommended!*)
6. Copy it
7. Delete only if there are no instances of it.



Settings Tab: Response Settings

1. Choose who the form can be completed for
2. Set the Public Form, which is the custom version of the Participant, Organization, or Anonymous form that new responders will be prompted to complete.
3. Allow External Participant Referrals
4. Customize instructions for returning responders

Response Settings [Cancel] [Save]

RESPONDER TYPE	PUBLIC FORM
<input checked="" type="checkbox"/> Participants	Default form ▼
<input type="checkbox"/> Organizations	Default form ▼
<input type="checkbox"/> Anonymous	Default form ▼

Participant Referrals ×

[Responder Login Page Instructions](#)



Settings Tab: Form Submission Settings

Form Submission Settings

[Cancel](#) [Save](#)

Submit Action Confirmation message
 Redirect to URL

Submit Message

Thank you for completing this survey!

Send Email To Submitter
 Complye Users

Select Users
Albert Tang

1. Set a thank you message or a redirect link for users after they submit the form.
2. Send the participant a confirmation email.
3. Choose Complye users to email when new responses are received.

Email Template

Select Template

Survey Submitted Confirmation

Email Body Content (Keywords: #ParticipantName, #SurveyName,#UrIText, #SubmittedUrl,#ComplyeInstanceName)

B *I* U ~~S~~ " ' </> H₁ H₂ ☰ ☷ x₂ x² ☰ ☷ ↶ ↷ Normal

Hi #ParticipantName ,

Thank you for completing the #SurveyName.#UrIText

If you submitted and now need to make changes, please contact #ComplyeInstanceName for assistance.
Thank you.

This is an automated message. Please do not reply to it.



History Tab

Navigation: Instances **7** | Question Fields | Rules **1** | Settings | **History**

History

Section Activity ▾

Settings Activity **1** ▴

Action	User	Date and Time
Form settings updated	Rosie Marshall2	2024-01-29 12:57 PM

Instance Activity **61** ▴

Action	User	Date and Time
⌚ Survey instance created [February 2024]	Rosie Marshall2	2024-01-30 07:42 PM
⊕ 17 distinct responders added to instance [February 2024]	Rosie Marshall2	2024-01-30 07:42 PM
⊕ 1 respondent completed the survey [January 2024]	Rosie Marshall2	2024-01-30 07:37 PM
Instance started by bulk action [January 2024]	Rosie Marshall2	2024-01-29 03:33 PM
⊕ Survey reopend for 1 respondent [December 2023]	Thanveer A	2024-01-05 01:27 AM

- On the History tab, you can:
- View a record of changes to the form settings
 - See all of the activity for all instances of the form.

None of the information on the History tab can be changed on this tab, but changes made to the form instances, fields, and settings will appear here





Form Logic Rules



Form Logic Rules

Rules are If-Then statements based on conditions (field entries) and actions (alert, show, hide, require, expand).

These skip logic statements allow you to create different data entry paths or branches for users based on what is entered earlier in the form.

Condition Logic Rule

Rule Name

Rule is Active

IF

Field 1

Field 1 Condition 1

THEN

Action 1

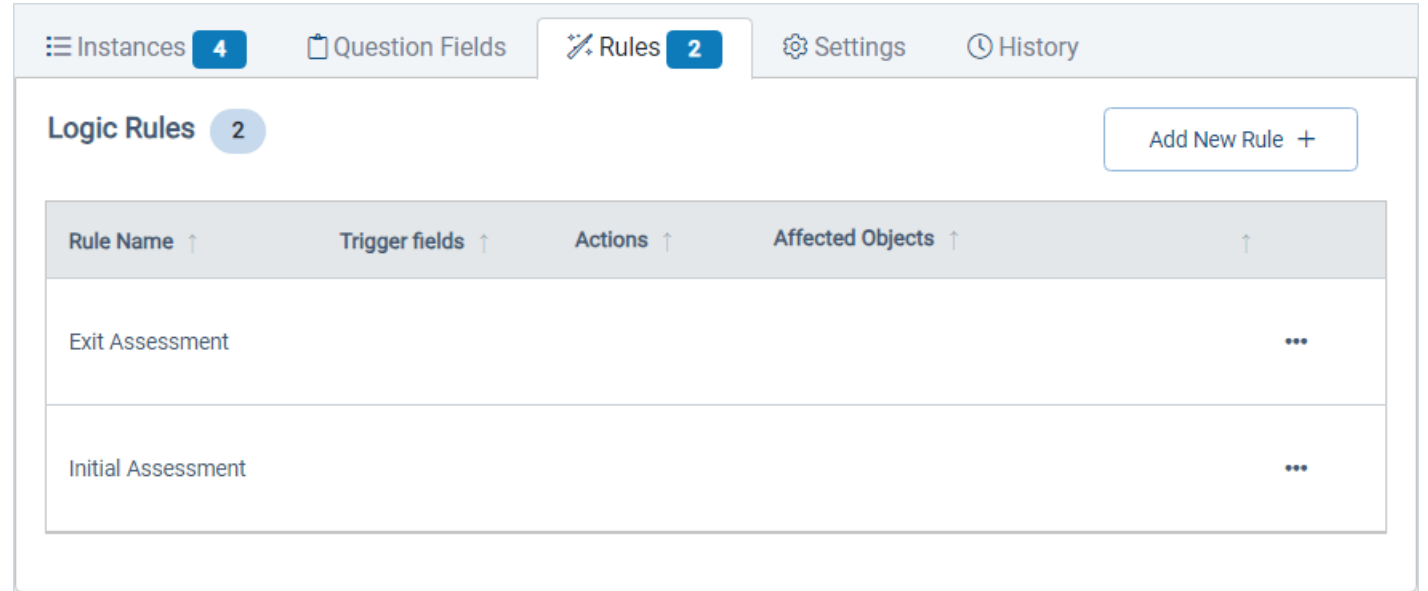
Object Type Section Field Alert

Object 1



Form Logic: Creating A Rule

- Rules can be applied to single fields or entire sections at once
- Logic rules can be added to new and existing forms.
- Rules copy when surveys are copied.
- An existing rule can be copied for the same form if similar rules are needed.



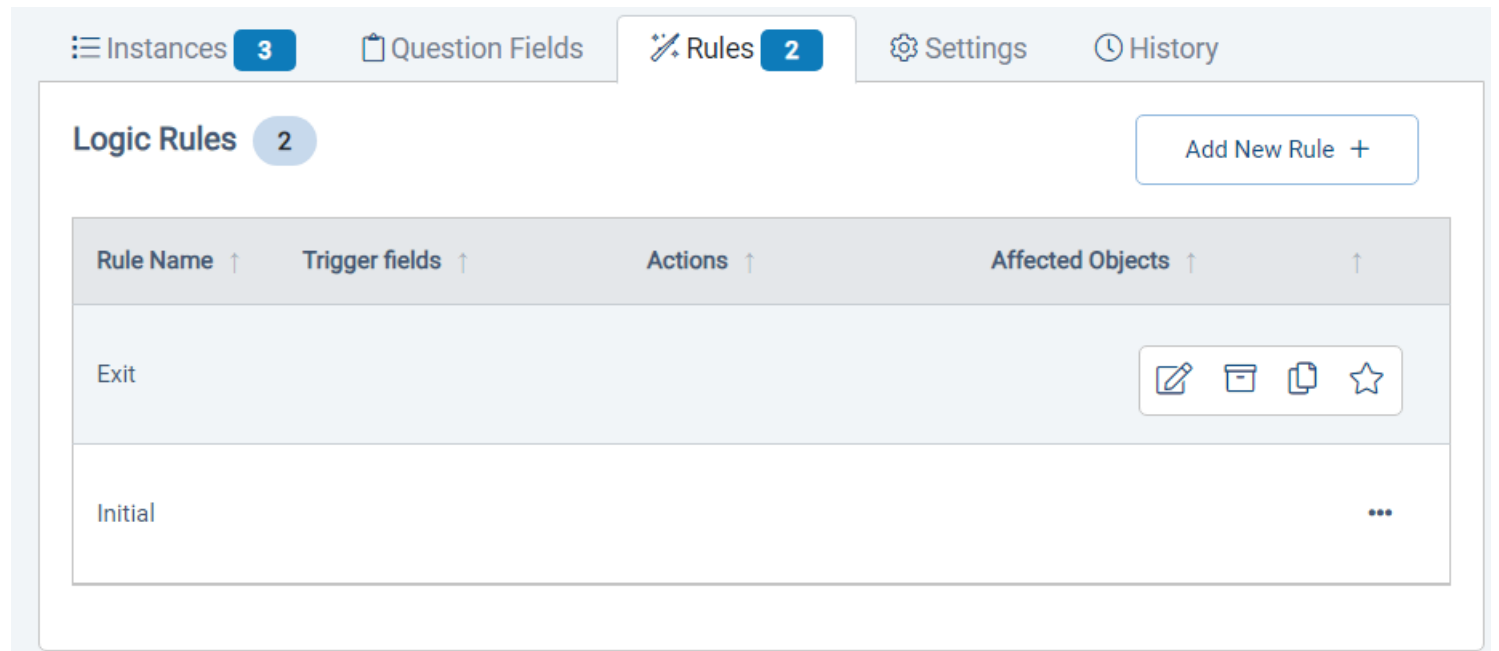
The screenshot displays a software interface for managing Logic Rules. At the top, there are navigation tabs: 'Instances' (4), 'Question Fields', 'Rules' (2), 'Settings', and 'History'. Below the tabs, the 'Logic Rules' section is active, showing a count of 2 rules and an 'Add New Rule +' button. A table lists the existing rules:

Rule Name ↑	Trigger fields ↑	Actions ↑	Affected Objects ↑	↑
Exit Assessment				...
Initial Assessment				...







Form Logic: Editing & Copying Rules

- Rules can be applied to single fields or entire sections at once
- Logic rules can be added to new and existing forms.
- Rules copy when surveys are copied.
- An existing rule can be copied for the same form if similar rules are needed.



The screenshot shows a software interface for managing logic rules. At the top, there are navigation tabs: 'Instances' (3), 'Question Fields', 'Rules' (2), 'Settings', and 'History'. Below the tabs, the 'Logic Rules' section is active, showing a table with two rules: 'Exit' and 'Initial'. The 'Exit' rule has a set of action icons (edit, delete, copy, star) to its right. The 'Initial' rule has a three-dot menu icon to its right. An 'Add New Rule +' button is located in the top right corner of the Logic Rules section.

Rule Name ↑	Trigger fields ↑	Actions ↑	Affected Objects ↑	↑
Exit				   
Initial				...

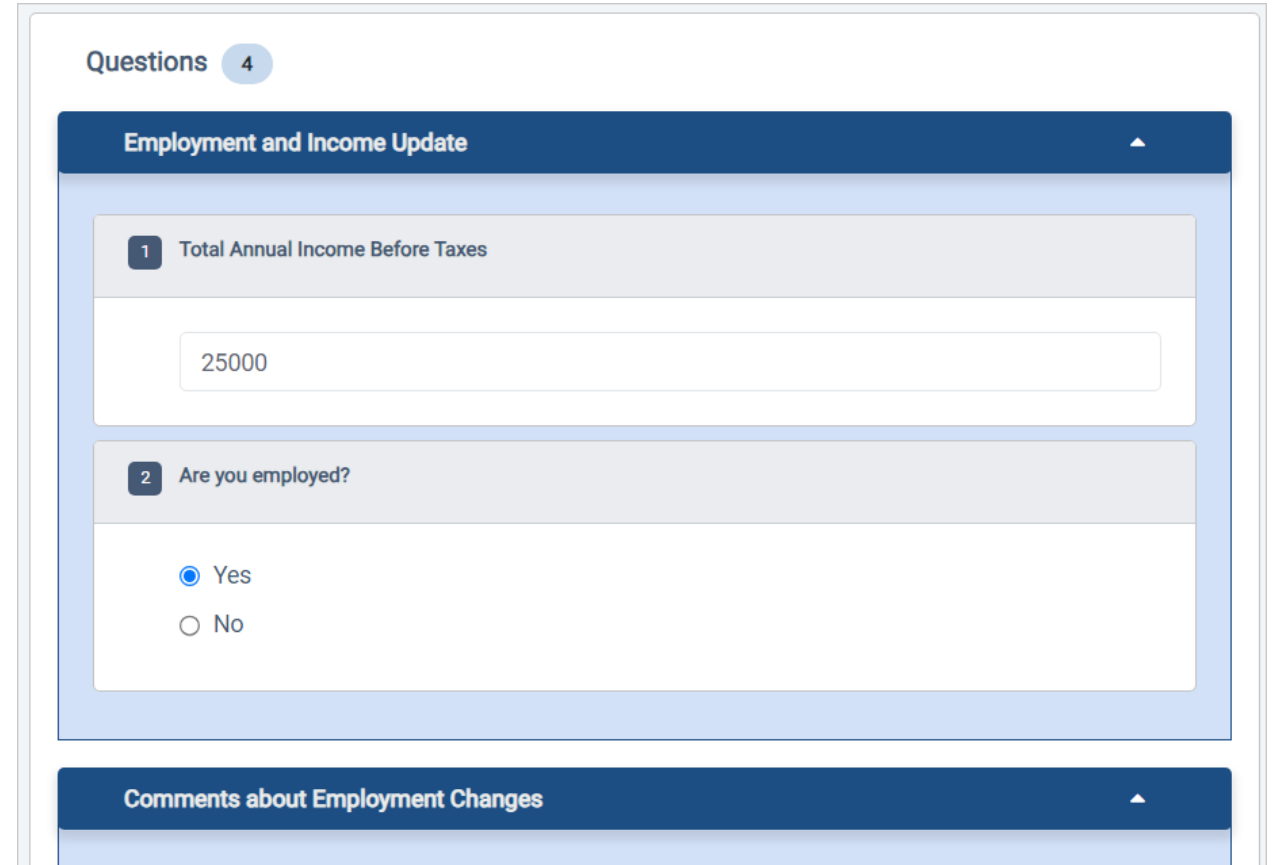


Form Logic - Exceptions

1. Form Logic Rules now apply when you fill out survey responses in Compyle as a user or as a participant working on a large device.
2. On mobile devices, rules only apply if the desktop mode is activated, which is the default now.

Exceptions

- Multi-entry forms do not apply logic rules.
- The survey instance question view does not show rules.
- Printing forms will include all visible by default fields and sections.



Questions 4

Employment and Income Update

1 Total Annual Income Before Taxes

25000

2 Are you employed?

Yes

No

Comments about Employment Changes



Form Logic vs Workflows

Compyle's **Form Logic Rules** are now live.

We are also starting to gather requirements for **Workflow Logic Process Rules** to automate client and user management for the future.

Here is how they differ.

	Form Logic	Workflow Logic
<i>Status</i>	Live as of 6 Feb. 2023	Roadmap for 2024-2025
<i>Admin Created Rules</i>	Yes	Yes
<i>Affects Forms</i>	Single Survey/Note Form	Multiple Forms
<i>Field Entries Determine</i>	Required fields, visible fields, sections & pages available	Workflow enrollment
<i>Rules Apply</i>	When survey response is being completed	When various trigger actions occur
<i>Group Assignments</i>	No	Yes
<i>User Notifications</i>	No	Yes
<i>Navigation Within One Form</i>	Yes	Not Sure yet
<i>Navigation Across Forms</i>	No	Yes





User Communication Tools



Communication Tools

Form Management Folder

- All tabs: QR Code & Copy Link for Survey
- Instance tab: QR Code & Copy Link for specific Survey Instance
- Settings tab: Submission Settings: Send Submitter Email

Admin Menu

- Alert Templates: Customize the messages invoked by rules
- Email Templates: New Survey Submitter Confirmation emails

Data Entry

- Unsaved changes warning message





Assorted Refinements



Various Improvements

- Scorecard Feeds to Variable type measures for more disaggregated data analysis
- Behind the scenes changes for performance, security, and ease of use.
Benefit: Things work better so users are happier and can more easily do what they need to do





Conclusion & Future Endeavors



Conclusion

Let's see what we can create together next.



Resources & Reminders

Documentation

- Release Notes:
<https://support.clearimpact.com/en/compyle-release-notes-form-logic-rules-survey-management-february-2024>
- Compyle Design: Field Types: pictures of field types in edit mode and entry mode:
<https://support.clearimpact.com/en/compyle-implementation-field-types>
- [Form Logic Rules: Conditional Logic for Survey Forms and Note Forms](#)
- [Form Logic: Tips & Tricks](#)
- [Form Logic: Troubleshooting](#)
- [Survey Form Management Interface](#)
- [Alert Templates](#)



Q & A



- Any questions?