



# DataMotion Secure Platform Secure Forms Guide

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## REVISION HISTORY

This section summarizes significant changes, corrections, and additions to the document. The history appears in chronological order with the most recent changes listed first.

### ***Version 1***

Initial version of this document.

## About This Publication

### ABOUT THE DATAMOTION SECURE PLATFORM

DataMotion is a leading provider of secure digital communications, enabling organizations in regulated industries—such as financial services, healthcare, and government—to exchange sensitive information with confidence. Our Secure Message Center empowers businesses to facilitate seamless, compliant, and user-friendly interactions through secure email, messaging, and document exchange.

Designed for security, efficiency, and ease of integration, DataMotion's platform ensures that administrators can manage secure communications effortlessly while meeting stringent compliance requirements like GLBA, HIPAA, and PCI DSS. With end-to-end encryption, zero-trust architecture, and seamless API integrations, our solutions enhance both customer experience and operational productivity.

### INTENDED AUDIENCE

This publication is intended for a technical audience, including system administrators and system integrators, primarily those who are responsible for the management of DataMotion Secure Platform. They are not expected to be security experts, but knowledge of security policies and email is helpful.

Additional technical documentation, as well as user documentation, is also available from DataMotion. See [DataMotion Documentation](#) (on page 7).

The following table provides synonyms that you may encounter for some of the **User Interface** components. The synonyms may refer to the component or an identifiable part of the component.

#### Synonyms for User Interface Components

| Component                        | Sometimes Referred to as:    |
|----------------------------------|------------------------------|
| DataMotion Secure Message Center | Secure Message Center or SMC |

## HOW TO USE THIS PUBLICATION

The *DataMotion Secure Platform Secure Forms Guide* contains detailed information on the integration, maintenance, and administration tools provided by DataMotion to companies implementing and customizing DataMotion Secure Platform.

## RELATED INFORMATION

### DATAMOTION DOCUMENTATION

- *DataMotion Secure Platform User Guide* (part # 050006)  
Provides instructions for general users to utilize the features within the Secure Platform which is the user interface of the DataMotion Secure Platform.

Additional documentation is available on many other topics. Please contact DataMotion Customer Service for more information.

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# 1

## Introduction

---

### DATAMOTION SECURE FORMS

DataMotion Secure Forms enables businesses to create secure web forms that can be provided to their users and customers. These forms will allow for the secure submission of data via an easy-to-use interface that is similar to many common web forms found on the websites of financial, insurance, and many other common enterprise sites. These forms can be easily integrated into your website for customers to use to submit sensitive for your review.

## 2

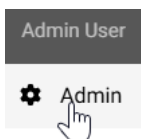
## Forms Management

### MANAGING FORMS

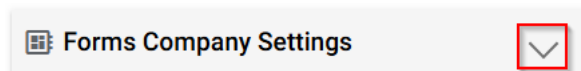
There are a wide range of features and settings that you can configure to manage and customize your forms to suit the needs of your organization. Many of these functions are performed via the [Form Library](#) and the editor that can be reached from there which allows you to begin [Creating a Secure Form](#). Before you begin there, however, there are a few administrative settings that you should take note of first.

These settings can be easily reached via the standard admin settings by:

1. Clicking your username icon from the Secure Message Center at the top right.
2. Select Admin.



3. On the Company Settings view scroll down to the Forms Company Settings and if they are not open already click on the arrow to open the settings.



Once the above steps are completed you will be shown the settings which you should configure first before moving to form creation. These settings may look something like the following:

## Forms Company Settings

| Description              | Value                                           |
|--------------------------|-------------------------------------------------|
| Default anonymous sender | testforms@datamotion.com                        |
| Default form recipient   |                                                 |
| Submission Columns       | <b>Name</b> <input type="text" value="Name"/>   |
|                          | <b>Value</b> <input type="text" value="Value"/> |
|                          | <b>Label</b> <input type="text" value="Label"/> |

These settings and the function they perform are as follows:

- Default anonymous sender
  - » This setting's value will determine who the sender/From address will be when forms have the Allow Anonymous Submissions setting enabled.
- Default form recipient
  - » This setting's value will determine who the default recipient of forms shall be.
- Submission Columns
  - » These settings will determine the name of the columns that will be displayed in the message body when a form is received.
  - » You can also hide a column entirely by clicking on the eye icon next to a column. This will gray out the column in the settings and look like this:

**Name**

- » If desired you can also drag each setting value around by clicking and grabbing the vertical dots icon which will re-arrange how the columns appear in the message body upon forms submission.

**Value**

## FORM LIBRARY

The Form Library view is the first thing you will see upon accessing Secure Forms.

| + New Form                                                                                   |                    |           |                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------|--------------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Form Name                                                                                    | Date Saved         | Published | Actions                                                                                                                                                                 |
|  Draft Form | 10/21/24, 11:40 AM | ×         |   |
|  Draft Form | 10/21/24, 10:41 AM | ✓         |   |

From here you can perform the following:

- Access the form editor and/or create a new form.
  - » The form editor provides numerous components and settings and is discussed in more detail in its own section [below](#).
- Copy an existing form.
- Delete an existing form.

### Duplicate a Form

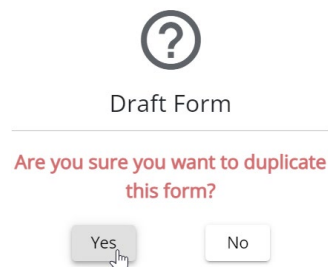
You can duplicate any existing form which will copy all the controls and configuration of the form into an exact copy. You can do this by:

1. Clicking on the Copy icon under the Actions column.

#### Actions



2. You will be asked to confirm and at this stage click Yes.



The form will be duplicated, and you can make any edits to it that you desire.

### Publishing a Form

Once a form has been created you can publish the form.

**NOTE: A form must be published to be used. The difference between a published and non-published form on the will be an X for non-published and a checkmark for published.**

| Form Name                                                                                    | Date Saved         | Published |
|----------------------------------------------------------------------------------------------|--------------------|-----------|
|  Draft Form | 10/21/24, 11:40 AM | X         |
|  Draft Form | 10/21/24, 10:41 AM | ✓         |

You can easily publish the form from the management page by:

1. Click on the form in question.

| Form Name                                                                                                 |
|-----------------------------------------------------------------------------------------------------------|
|  <span>Draft Form</span> |

2. Once you have clicked on the form's name you will be brought back to the form editor screen where you can publish the form by clicking the Publish icon.

Draft Form



3. Click Yes when you get the popup to confirm.

### Warning!

This form has not been published. Would you like to publish it now?

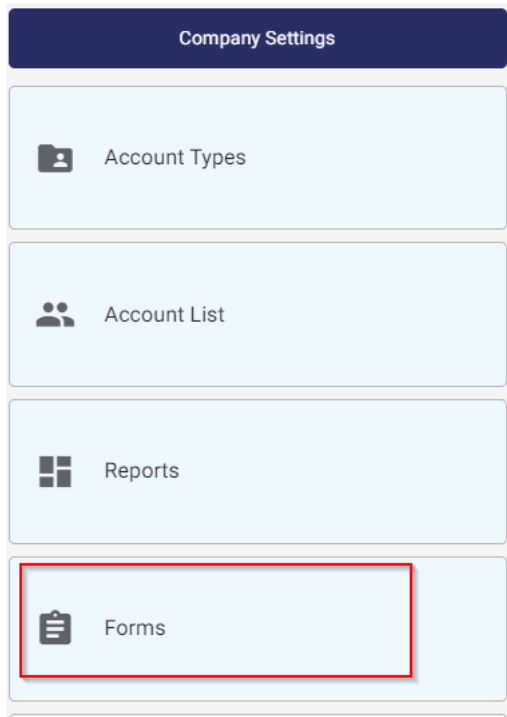
No

Yes

4. The form will now be published and can be used publicly.

**NOTE: These settings will only appear if your account has the Secure Forms product enabled.**

All Secure Forms are managed from the administrative area of the secure platform just like all other components of the system. This includes both the creation of Secure Forms and the configuration of all appropriate settings. You can access this management area from the main Company Settings page and clicking the Forms card on the left.



You will be brought to the Forms view which contains the capability to create a new form, view the existing form library, and manage settings.

### Delete a Form

You can delete any existing form which will completely erase it from the system. You can do this by:

3. Clicking on the Delete icon under the Actions column.

#### Actions



4. You will be asked to confirm and at this stage click Yes.



Draft Form

Are you sure you want to delete  
this form?

Yes

No

The form will be deleted and no longer accessible.

---

## 3

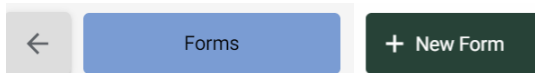
# Secure Form Creation

---

## CREATING A SECURE FORM

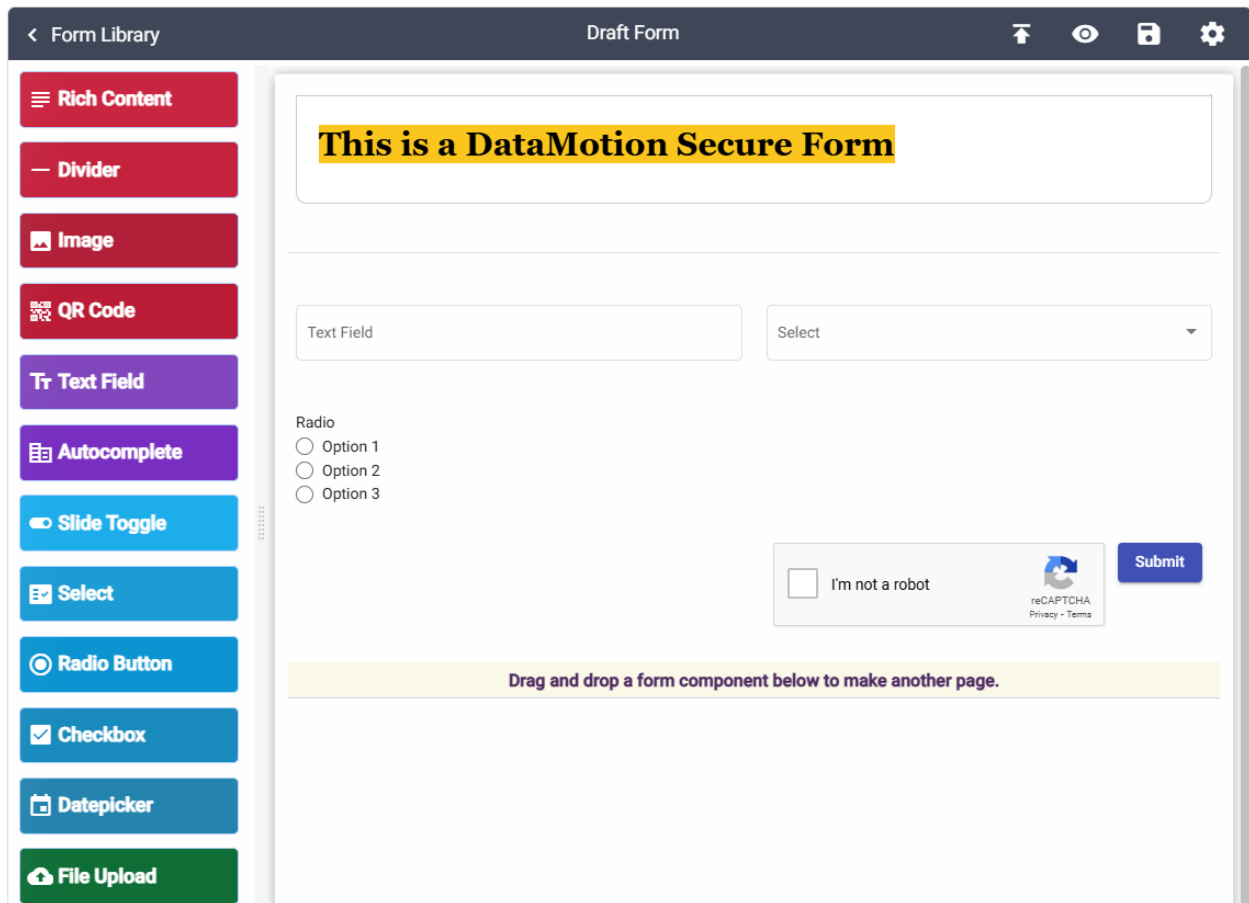
When you first get started with DataMotion's Secure Forms you will have to get accustomed to the interface and components involved in creating forms for your users and customers.

You can create a new form at any time from the Forms view by clicking the + New Form button at the top left of the Form Library view.



You will be brought to the Draft Form view where you can begin creating your form using the components provided. An example of a draft form with a few components is below for reference:

## Secure Form Example



## FORM EDITOR OPTIONS

The form editor itself has a number of high-level options that you should become familiarized with before adding components. These options are visible in the top bar of the editor and from left to right include the following:

- Publish
  - » The Publish option performs the same function as described in the Publishing a Form section above. This is performed by clicking the  icon and then clicking Yes in the popup window.

### Warning!

This form has not been published. Would you like to publish it now?



- Preview

- » The Preview option will display a window that will show you what the form will look like in either a PC Desktop view or mobile device view. This is performed by clicking the  icon and then choosing either mobile or PC.



- An example form of each choice is shown below.

#### ■ Save

- » The Save option will simply save your work on any form edits and is done by clicking the  icon.

#### ■ Form Properties

- » The Form Properties option (the ) opens an additional set of properties for configuring the form and has its own options. These are described in its own section below.

## FORM PROPERTIES

When first opened the Form Properties will present all of the available properties and additional features for a form.

**Form Properties**

Form Title \*  
Draft Form

Recipient for submissions \* [Advanced Options](#)

Form Submission Subject

Supported Languages  
English

Attachment Formats  
☐ JSON ☐ XML ☐ CSV

☐ Allow Anonymous Submissions ☒ Show Tabbed Page Names

☐ AI Discoverability Enabled

Save Publish

**HyperLink**

```
<a
  target="_blank"
  href="https://scp-qa.datamotion.com/forms/Dn9jEjIF">
  Draft Form
</a>
```

**Embedded**

```
<datamotion-forms form-id="Dn9jEjIF"
  base-url-public="https://scp-qa-api.datamotion.com">
</datamotion-forms>
<script src="https://cdn-qa.datamotion.com/scp/datamotion-forms.js">
</script>
```

Each property presented provides either additional functionality or a required parameter that is necessary for form completion. On the left side under Form Properties section itself these include:

#### ■ Form Title

- » The name that the form will be registered as within the Form Library. This field is required.

- Recipient for submissions
  - » The email address that will be used for receiving any form submissions from users. This field is required.
- Form Submission Subject
  - » The subject that will be used in the message sent to the email that is entered into the Recipient for submissions field above. While not a required field it is recommended that a subject is entered in order to provide clarity as to what type of form data is being sent to the form recipient.
- Supported Languages
  - » The language that the form will support (only one can be chosen). This includes the following:
    - English
    - French
    - Spanish
- Attachment Formats
  - » The formats that data entered into the form submissions will be attached as (multiple options can be chosen).
    - JSON
      - Form submission data will be attached as .json files.
    - XML
      - Form submission data will be attached as .xml files.
    - CSV
      - Form submission data will be attached as .csv files.
- Allow Anonymous Submissions
  - » When selected this option will allow forms to be submitted anonymously. The sender in this case is set on the Forms Company Settings of the standard Admin area described in the [Managing Forms](#) section.
- Show Tabbed Page Names
  - » This will display the page names for forms with multiple pages. This option is automatically selected when forms have multiple pages.
- AI Discoverability Enabled
  - » When enabled this option will make it so that the form can be used by JenAI Assist for generating chat responses.
  - » This option has additional parameters which include:
    - AI Search Text

- You should enter an accurate description of your form for JenAI to use to search.
- Tag
  - The category tag that should be applied to the form for JenAI to use to search.

Once you are satisfied with these properties you can either Save the changes or Publish the form from this screen.

### Form Properties

Form Title \*

This is a Secure Form

Recipient for submissions \*

recipient@email.com

[Advanced Options](#)

Form Submission Subject

Secure Form Submitted

Supported Languages

English

Attachment Formats

☒ JSON ☒ XML ☒ CSV

☒ Allow Anonymous Submissions ☒ Show Tabbed Page Names

☒ AI Discoverability Enabled

Save

Publish

AI Search Text

This is a Secure Form with test data

Tag

Test

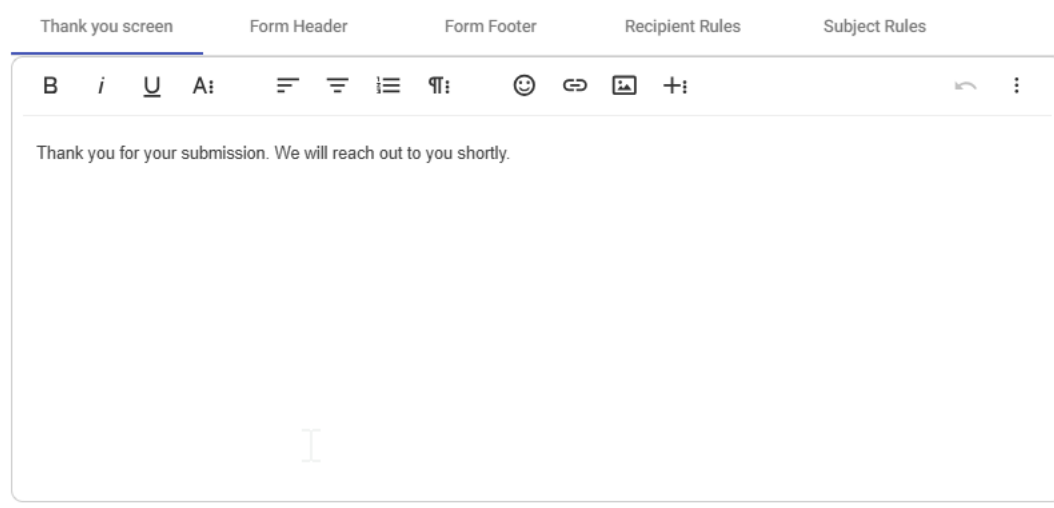
However, there are additional functions available from within the Form Properties window on the right side that you can use to provide additional functionality to the form if you desire. These are discussed in the following sections.

### Thank you screen

A Thank you screen can be customized which shall appear once a user has completed and submitted a form.

**NOTE: You must complete form creation and publish a form in order to view the Thank you screen as you cannot submit a form using the Preview functionality.**

You will be provided an editor to create your Thank you screen that will look like this:

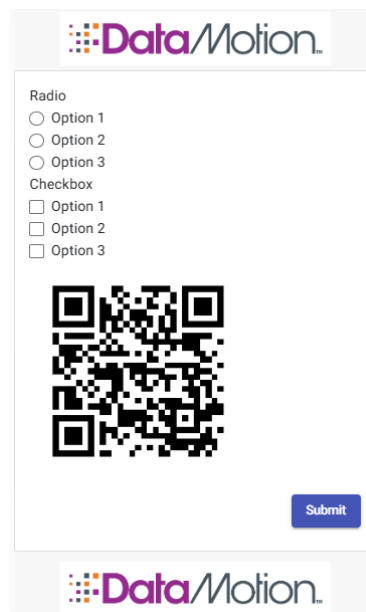


This editor provides extensive content editing capabilities similar to the editor used for creating and sending secure messages on the platform. In addition to text you can also add images, emoticons, videos, and even inline files. Any changes made within this editor are automatically saved so there is no need to worry about losing any changes.

### Form Header and Form Footer

Both the Form Header and Form Footer have the same editor functionality as the Thank you screen from above. Once you have created a header, footer, or both you can view how they look using the Preview view from the main Form Editor.

An example of a header and footer being inserted on a form is shown below.



## Recipient Rules

The Recipient Rules allow you to create rulesets that can change who the recipient of the form will be depending on the values that are selected by the submitter and which rules are matched. These function similarly to the visibility rules and also have a similar editor which looks like this.

**NOTE: If your form has no input controls (radio buttons, checkboxes, text fields, etc.) you will be unable to configure any rules.**

The screenshot shows the 'Recipient Rules' tab in the form editor. At the top, there are navigation tabs: 'Thank you screen', 'Form Header', 'Form Footer', 'Recipient Rules' (selected), and 'Subject Rules'. Below the tabs, the 'Recipient Email Address' field is visible with an 'Apply' button. The rule configuration area shows 'And' selected as the logical operator. A single rule is defined: 'Radio1 (Radio)' equals 'Radio1 (Radio)'. There are buttons for '+ Rule', '+ Ruleset', and '- Ruleset' on the right.

You can have as many of these Recipient Rules as you need in order to accommodate situations where you would have numerous form receivers.

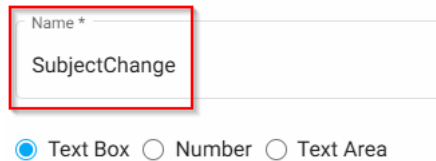
### Applied Rules

The 'Applied Rules' section displays three rules that are currently active. Each rule has a 'Remove' button. The first rule is for 'recipient2@receiver.com' with the condition 'Select1 (Select) = Option 2'. The second rule is for 'recipient1@receiver.com' with the condition 'Textfield1 (Text Field) = Test'. The third rule is for 'recipient2@receiver.com' with the condition 'Radio1 (Radio) = Radio1 (Radio)'. Each rule configuration area includes logical operator options ('And' or 'Or') and buttons for '+ Rule', '+ Ruleset', and '- Ruleset'.

## Subject Rules

While this is not directly a part of the form editor's interface it is possible to change the Subject of the message that is created when a form is submitted via variable replacement. This is relatively simple to do and only requires that you have a form component which accepts inputs (such as a Text Field) be given a field name in curly braces.

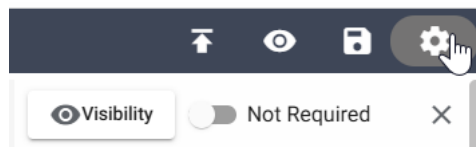
5. Create and/or take note of the Name of the field you want to use for the curly brace replacement.



Name \*  
SubjectChange

☒ Text Box ☐ Number ☐ Text Area

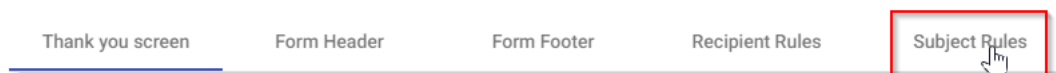
6. Open the Form Properties screen.



↑ ↓ 🔍 ⚙️

Visibility Not Required X

7. Select the Subject Rules tab.



Thank you screen Form Header Form Footer Recipient Rules **Subject Rules**

8. Create a subject rule and when creating the rule ensure that the Subject contains the Name of the field who's you want to be used during replacement.
  - a. Ensure that you use the format {{Name}} when doing this.
  - b. This is a fairly basic example, but you should have something like this when done:



Subject  
Change to {{SubjectChange}}

Apply

☒ And ☐ Or

+ Rule + Ruleset - Ruleset

SubjectChange (Text... = Replaced Subject X

9. Click Apply to set this subject rule.
10. While not essential it is advised that you perform a form submission test to ensure that your rule will work as you expect.



## This is a DataMotion Secure Form

Text Field

Replaced Subject

Now during a form submission and when the rule is matched, the Subject of the message will contain the value entered in the field you referenced in the subject rule using curly braces like the below:

Change to Replaced Subject



KM USER  
kmuser@dm.com



x kmuser@dm.com

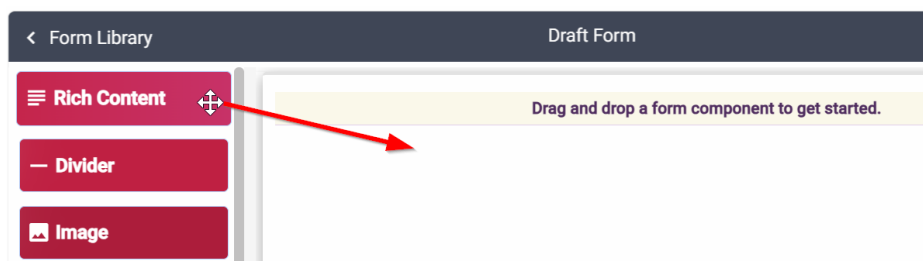
form-submission.csv

| Name          | Value            |
|---------------|------------------|
| SubjectChange | Replaced Subject |

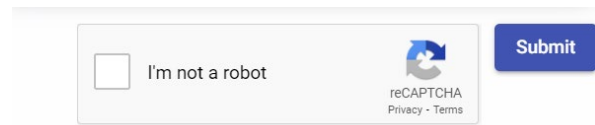
## FORM COMPONENTS

Each form component provides a common control found on many websites for entering or selecting data options.

**NOTE: All components must be dragged from the left side tray onto the center area in order to be used as shown below.**

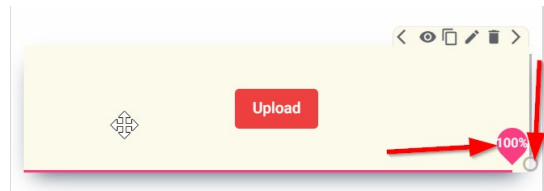


**NOTE: When the first component is placed a reCAPTCHA and Submit button will be automatically added to the bottom of the form and look something like this:**



All available components and their functionality are described throughout the sections below.

**NOTE:** Certain components allow for the editing of the region that they occupy. You can edit these regions by clicking and dragging on these component's region controls. While some components will have only or none of these controls, the image component, for example, contains both sliders. The vertical slider controls the region's height, and the horizontal slider controls the region's width.

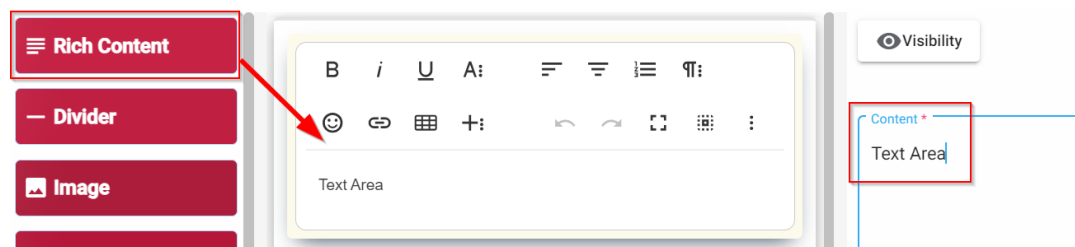


**NOTE:** Many components will have additional attributes and some of them will require values in order to be utilized. These will have a \* symbol next to them in the settings window on the right when a component is selected.

## RICH CONTENT COMPONENT

The **Rich Content** component provides a free form text area that you can utilize to enter any desired content.

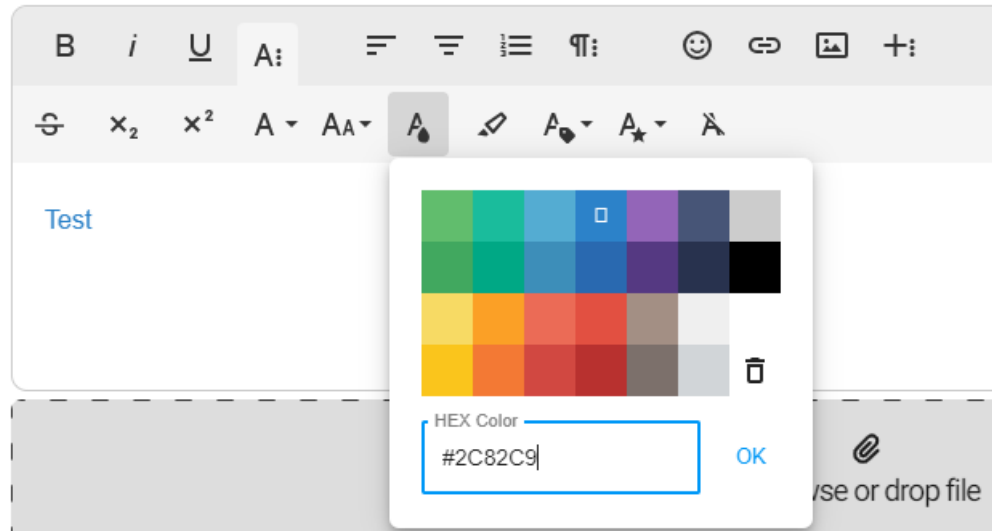
**NOTE:** This component is only for form authors to create text or content within the form and cannot be interacted with by a user filling out the form.



Within the Rich Content's text editor there are a number of options available for you to alter or enhance the content that will be displayed:

- Bold
- Italicize
- Underline
- More Text which includes:
  - » Font Controls
  - » Font Family
  - » Font Size which includes options from 8 through 96.

- » Text Color which includes the ability to enter a HEX color (see below).

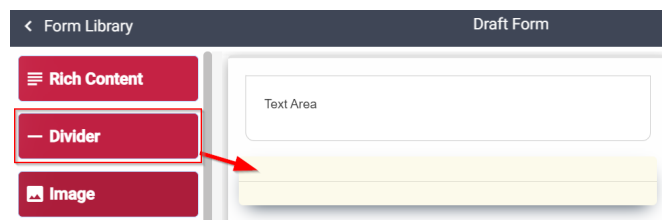


- » Background Color, which also includes HEX color (like the above).
- » Inline Class
- » Inline Style
- » Clear Formatting (clears all formatting in the text editor).
- Align Left (aligns selected paragraph to the left)
- Align Center (aligns selected paragraph to the center)
- Ordered List which creates a sequential numeric list.
- Paragraph controls which include:
  - » Align Right (aligns selected paragraph to the right).
  - » Align Justify (justifies selected paragraph).
  - » Ordered List
  - » Unordered List
  - » Paragraph Format
  - » Paragraph Style
  - » Line Height
  - » Quote
- Emoticons (includes all standard emoticons).
- Insert Link which allows you to insert a hyperlink.
- Insert Table
- More Rich which allows you to insert special characters or a horizontal line.
- An Undo function.

- A Redo function.
- A full screen mode.
- A select all function.
- More Misc which includes a code view option and a help option that shows shortcut commands.

## DIVIDER COMPONENT

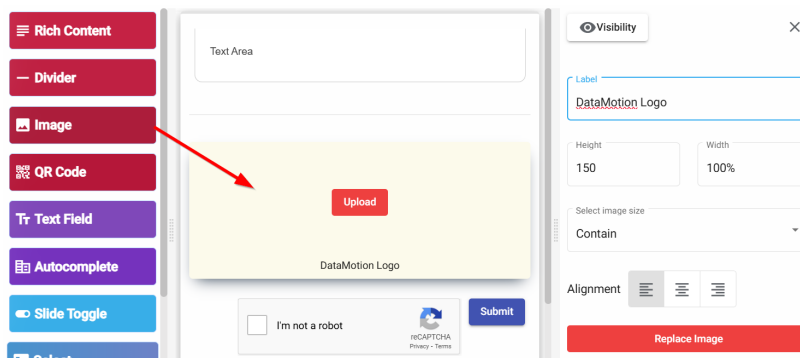
This **Divider** component is a simple horizontal divider line that can be used to separate areas of the form. This is helpful when you have a large form with many components or visibility rules that alter the form. When this component is placed it will look something like this:



As this component is fairly simple in nature it does not have any additional controls.

## IMAGE COMPONENT

The **Image** component allows you to insert an image within a specified region into the form to provide context or branding presence to users.



Initially there will be nothing present within the component's region, but before uploading an image please ensure that you are happy with the region size as it will greatly affect the image. You can edit this by clicking and dragging on the controls within the component's region as described [above](#).

Once happy with the region size you can upload and even edit an image. This is fairly simple and is done by:

1. Clicking on the Upload button in the center of the component.

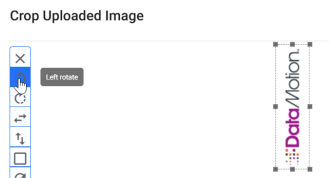
2. In the new dialog click the paper clip icon (📎).
3. Select the image to upload.
4. Click the Submit button.
  - a. Or begin editing the image if desired.

If you want to edit the image do not click the Submit button just yet from step 4 above. You should leave the dialog open and begin editing the image.

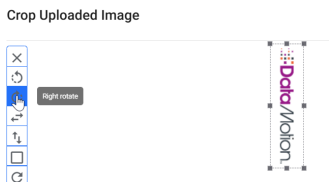


Your available options from top to bottom on the left side of this dialog box are as follows:

- Remove image
- Left rotate



- Right rotate



- Swap horizontal



- Swap vertical



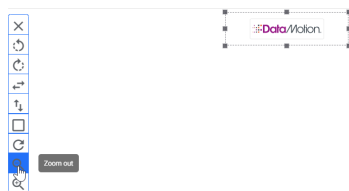
- Contain Within Aspect Ratio

Crop Uploaded Image



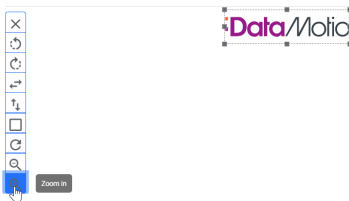
- Reset Image
  - » Removes all changes and reverts the image to its first uploaded state.
- Zoom Out

Crop Uploaded Image



- Zoom In

Crop Uploaded Image



This component also has a number of available parameters on the right side of the screen once inserted which allow you to change aspects of the image. These include the following:

- Label
  - » Lets you place a label under the image to provide a description.
- Height
  - » Allows you to specify a region height.
- Width
  - » Allows you to specify a region width.
- Select image size
  - » This will automatically scale the image depending on your choice which can be either:
    - Auto
      - Will automatically scale the image within the region. This generally keeps the image at the most appropriate resolution for the region and also allows for usage of the alignment options.



- Cover

- Will fill the entire Height and Width region with the uploaded image. As this option fills the entire region, the alignment options do not affect anything.



- Contain

- Will fill a portion of the region with the uploaded image. This will generally leave white space within the region and allow for using the alignment options.



- Alignment

- » This will align the uploaded image to a chosen side of the region including:

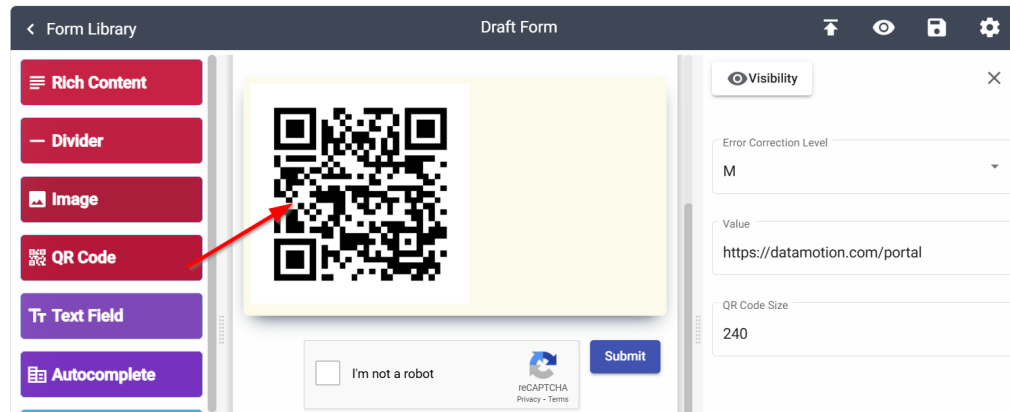
- Left
    - Center
    - Right

- Replace Image

- » Opens the upload image dialog to insert, replace, and/or edit the image and region.

## QR CODE COMPONENT

The **QR Code** component allows you to place a QR code scannable image within the form for users to scan with their mobile device. As with the Image Component above please ensure you size the region for this component appropriately as it will greatly affect the overall size of the QR Code.

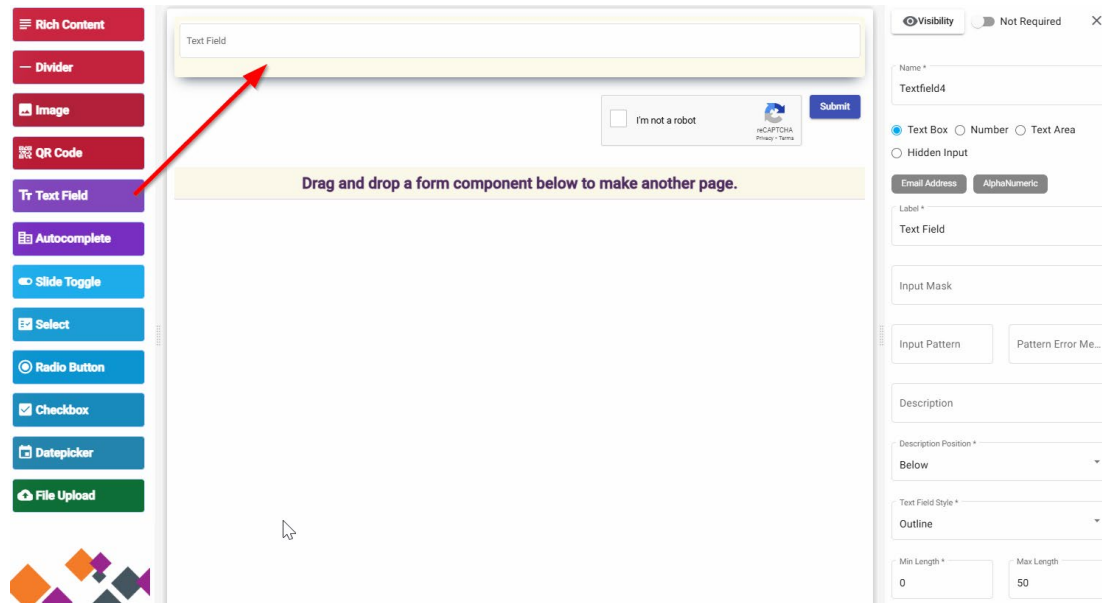


The QR Code component has a few parameters on the right side of the screen when selected which include:

- Error Correction Level
  - » This setting determines the amount of error correction that will be applied and includes:
    - L (Low)
    - M (Medium)
    - H (High)
    - Q (Quality)
- Value
  - » Determines the URL that the QR code will utilize.
- QR Code Size
  - » The overall size of the QR Code image. It is advised to not go below 50 as it will make the QR Code difficult to scan.

## TT TEXT FIELD COMPONENT

The **TT Text Field** component provides a text field for inputting data that can be free form or meet a certain set of attributes and requirements set via the numerous controls provided in the editor on the right side of the component.



Many of the controls for this component will change what data may be entered into the text field and include:

- Name
  - » Provides an internal name for the Text Field. This control requires a value.
- Text Field Type - These are a set of radio buttons that change what may be entered into the text and have their own additional options. These radio buttons and their options include:
  - » Text Box
    - Which has the options of:
      - Email Address
      - AlphaNumeric
  - » Number
    - Which has the options of:
      - Phone Number
      - Social Security
      - Number

- Dollars
- IP Address
- » Text Area
  - This option allows for free form text entry into the field.
- » Hidden Input
  - This option hides the field from the view of the user.
- Label
  - » The label text for the Text Field. This control requires a value.
- Input Mask
  - » Allows you to dictate a valid format for data input. This is automatically populated for Text Field Type options like Number → Phone Number which sets (000) 000-0000 as the value for Input Mask.
- Input Pattern
  - » Allows you to set a pattern (such as a Regex) that determines valid data entry. This is automatically populated for Text Field Type options like Number → Social Security which sets a Regex of ^([0-9]+-)\*[0-9]+\$ as the Input Pattern.
- Pattern Error Message
  - » When an input within the text field does not match a valid value for Input Pattern the error message entered in this control will be displayed.
- Description
  - » Allows you to set a description for the text field should it be needed.
- Description Position
  - » Moves the Description (from above) to a specific location. This control is required and has a set of options which include:
    - Below
    - Above
    - Left
    - Right
    - As Tooltip
  - You may notice that this option causes the Description to disappear. This is normal and the Description will display when a user hovers over the text field for a brief time. This will look like this:

Phone Number

This is a description

## ■ Text Field Style

- » Alters the appearance of the text field to fit different user interface styles. This control is required and includes options such as:

### - Outline

Phone Number

### - Fill

Phone Number

### - Standard

Phone Number

### - Legacy

Phone Number

## ■ Min Length

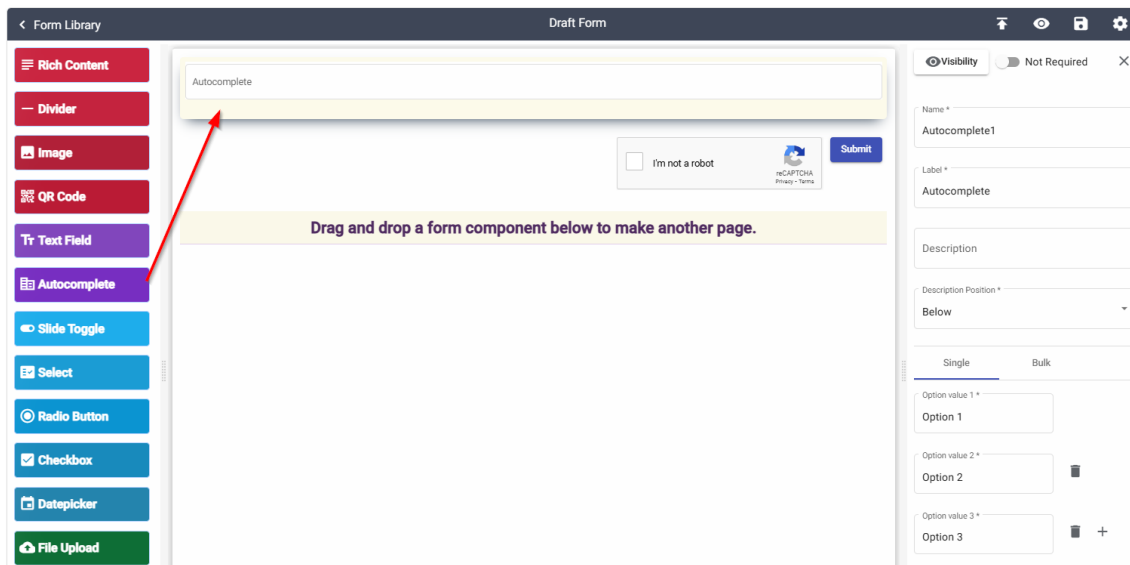
- » Controls the minimum length of text entered into the text field. This control requires a value and must be a number.

## ■ Max Length

- » Controls the maximum length of text entered into the text field.

## AUTOCOMPLETE COMPONENT

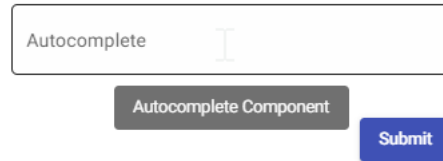
The Autocomplete component provides a way for form creators to have users select certain values that cannot be edited once selected. It is advisable to instruct users that they will have no way to change their selections for this component type and that they should be certain of their choice when filling in the form.



All of the additional controls for this component are as follows:

- Name
  - » The internal name of the component. This field requires a value.
- Label
  - » This is the label that will be displayed for the component in the form. This field requires a value.
- Description
  - » A description as to what sort of information the component is looking for.
- Description Position
  - » Moves the Description (from above) to a specific location. This control is required and has a set of options which include:
    - Below
    - Above
    - Left
    - Right
    - As Tooltip

- You may notice that this option causes the Description to disappear. This is normal and the Description will display when a user hovers over the text field for a brief time. This will look like this:



Autocomplete

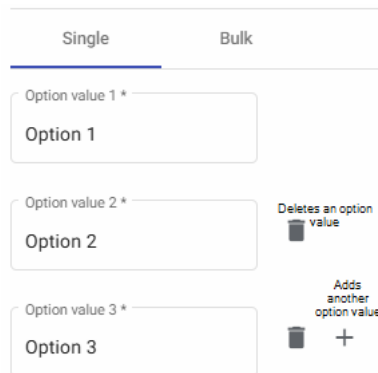
Autocomplete Component

Submit

The number of options a user can select and their values can be configured via these controls as well. This includes two methods of configuration which are:

### 1. Single

- Using this option requires entering values for each option individually as well as creating and deleting additional values as desired via the trash can and plus sign icons.



Single Bulk

Option value 1 \*  
Option 1

Option value 2 \*  
Option 2

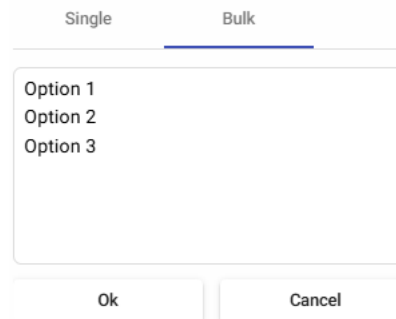
Option value 3 \*  
Option 3

Deletes an option value

Adds another option value

### 2. Bulk

- Using this option allows for entering or deleting a large number of values at once. Simply enter the desired options (separating each one via a new line) or delete options and then click the Ok button. When adding or deleting a large number of option values this method is much more efficient as it simply requires adding or deleting text and less button clicks.



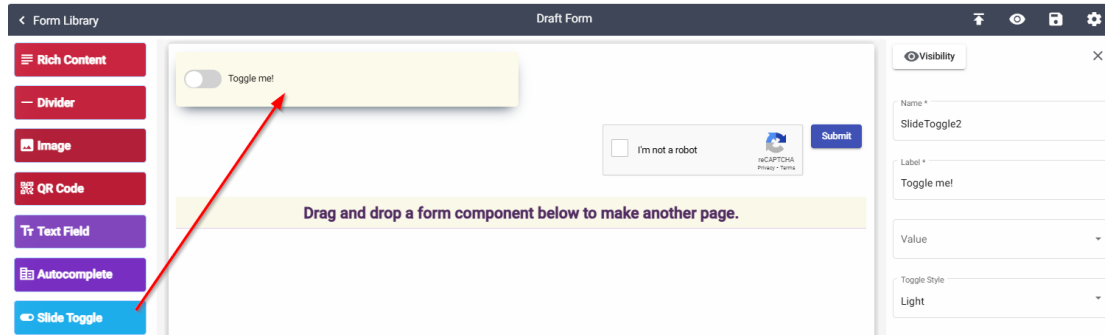
Single Bulk

Option 1  
Option 2  
Option 3

Ok Cancel

## SLIDE TOGGLE COMPONENT

The Slide Toggle component provides a simple yes or no slider for the form.



As this component is relatively basic by itself it only has a few controls to configure on the right side of the editor which include:

- Name
  - » The internal name for the component. This requires a value.
- Label
  - » The label that will be displayed next to the slider. This requires a value.
- Value
  - » The initial value for the slider. This can be either True or False.
- Toggle Style
  - » The appearance of the slider which includes additional values such as:



- Skewed



- Flat



- Flip



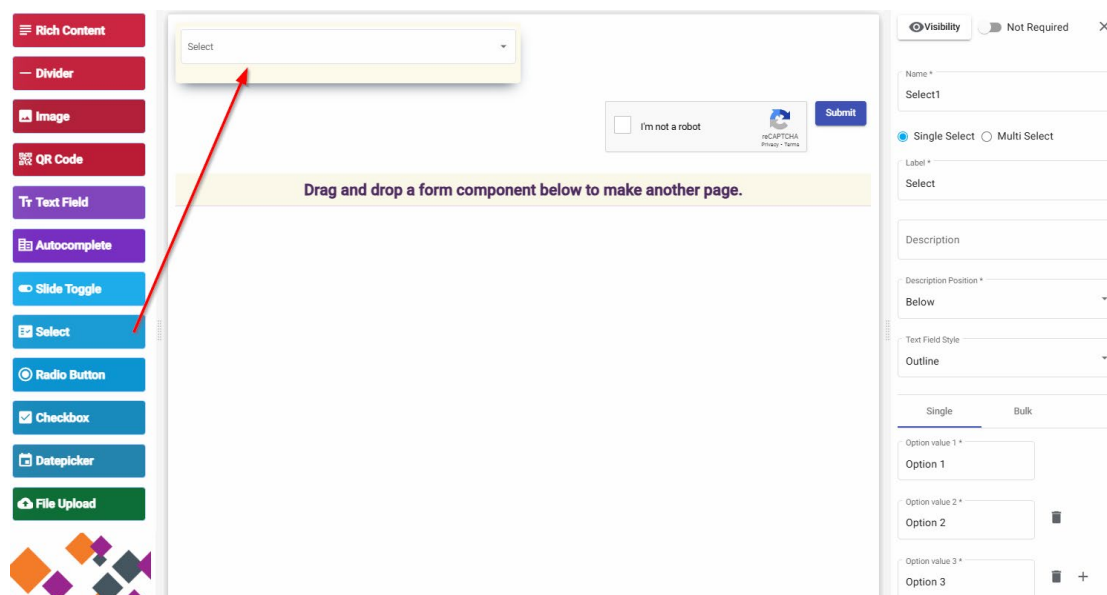
- Material

- This style has additional options for the Color of the slider which include:
  - Primary

- ☒ Toggle me!
- Accent
  - ☒ Toggle me!
- Warn
  - ☒ Toggle me!

## SELECT COMPONENT

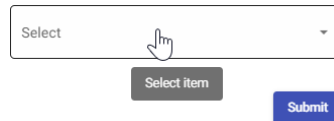
The Select component provides a drop-down of selectable options that a user can select when completing the form.



All of the additional controls for this component are as follows:

- Name
  - » The internal name of the component. This field requires a value.
- Label
  - » This is the label that will be displayed for the component in the form. This field requires a value.
- Description
  - » A description as to what sort of information the component is looking for.
- Description Position
  - » Moves the Description (from above) to a specific location. This control is required and has a set of options which include:
    - Below

- Above
- Left
- Right
- As Tooltip
  - You may notice that this option causes the Description to disappear. This is normal and the Description will display when a user hovers over the text field for a brief time. This will look like this:



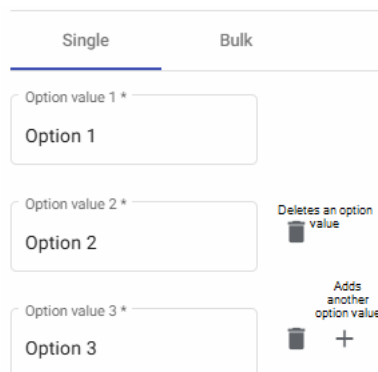
#### ■ Text Field Style

- » The appearance of the text used for the selectable options within the drop-down. This has additional values which include:
  - Outline
  - Fill
  - Standard
  - Legacy

The number of options a user can select and their values can be configured via these controls as well. This includes two methods of configuration which are:

#### 1. Single

- a. Using this option requires entering values for each option individually as well as creating and deleting additional values as desired via the trash can and plus sign icons.



#### 2. Bulk

- a. Using this option allows for entering or deleting a large number of values at once. Simply enter the desired options (separating each one via a new line) or delete options and then click the Ok button. When adding or deleting a large number of option values this method is much more efficient as it simply requires adding or deleting text and less button clicks.

Single Bulk

Option 1  
Option 2  
Option 3

Ok Cancel

## RADIO BUTTON COMPONENT

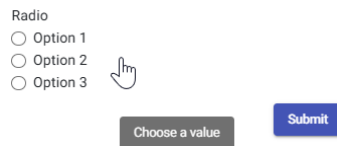
The Radio Button component allows for the selection of a single value from a set of options.

The screenshot shows the Secure Platform form builder interface. On the left is a sidebar with various form components: Rich Content, Divider, Image, QR Code, Text Field, Autocomplete, Slide Toggle, Select, Radio Button (highlighted with a red arrow), Checkbox, Datepicker, and File Upload. The main workspace shows a form with a Radio component being added, a reCAPTCHA widget, and a submit button. A red arrow points from the 'Radio Button' component in the sidebar to the 'Radio' component in the workspace. The right sidebar shows the configuration for the 'Radio' component, including fields for Name, Label, Description, and Description Position, and a section for options (Option 1, Option 2, Option 3) with a 'Bulk' tab selected.

All of the additional controls for this component are as follows:

- Name
  - » The internal name of the component. This field requires a value.
- Label
  - » This is the label that will be displayed for the component in the form. This field requires a value.
- Description
  - » A description as to what sort of information the component is looking for.
- Description Position

- » Moves the Description (from above) to a specific location. This control is required and has a set of options which include:
  - Below
  - Above
  - Left
  - Right
  - As Tooltip
- You may notice that this option causes the Description to disappear. This is normal and the Description will display when a user hovers over the text field for a brief time. This will look like this:



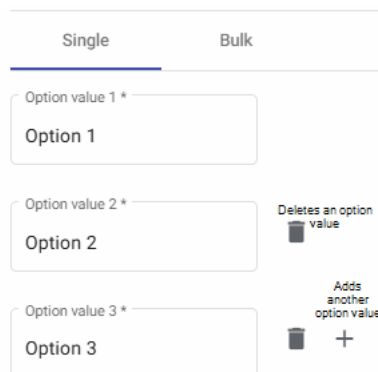
#### ■ Text Field Style

- » The appearance of the text used for the selectable options within the drop-down. This has additional values which include:
  - Outline
  - Fill
  - Standard
  - Legacy

The number of options a user can select and their values can be configured via these controls as well. This includes two methods of configuration which are:

### 3. Single

- a. Using this option requires entering values for each option individually as well as creating and deleting additional values as desired via the trash can and plus sign icons.



### 4. Bulk

- a. Using this option allows for entering or deleting a large number of values at once. Simply enter the desired options (separating each one via a new line) or delete options and then click the Ok button. When adding or deleting a large number of option values this method is much more efficient as it simply requires adding or deleting text and less button clicks.

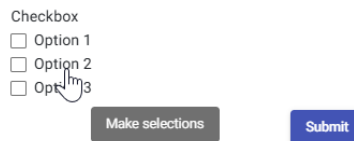
## CHECKBOX COMPONENT

The **Checkbox** component allows for the selection of one or multiple values from a list of options.

All of the additional controls for this component are as follows:

- Name
  - » The internal name of the component. This field requires a value.
- Label

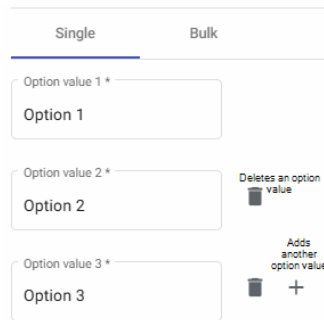
- » This is the label that will be displayed for the component in the form. This field requires a value.
- Description
  - » A description as to what sort of information the component is looking for.
- Description Position
  - » Moves the Description (from above) to a specific location. This control is required and has a set of options which include:
    - Below
    - Above
    - Left
    - Right
    - As Tooltip
      - You may notice that this option causes the Description to disappear. This is normal and the Description will display when a user hovers over the text field for a brief time. This will look like this:



- Text Field Style
  - » The appearance of the text used for the selectable options within the drop-down. This has additional values which include:
    - Outline
    - Fill
    - Standard
    - Legacy

The number of options a user can select, and their values can be configured via these controls as well. This includes two methods of configuration which are:

5. Single
  - a. Using this option requires entering values for each option individually as well as creating and deleting additional values as desired via the trash can and plus sign icons.



Single Bulk

Option value 1 \*  
Option 1

Option value 2 \*  
Option 2

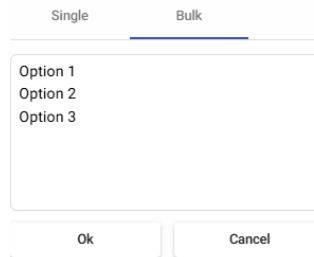
Option value 3 \*  
Option 3

Deletes an option value

Adds another option value

## 6. Bulk

- a. Using this option allows for entering or deleting a large number of values at once. Simply enter the desired options (separating each one via a new line) or delete options and then click the Ok button. When adding or deleting a large number of option values this method is much more efficient as it simply requires adding or deleting text and less button clicks.



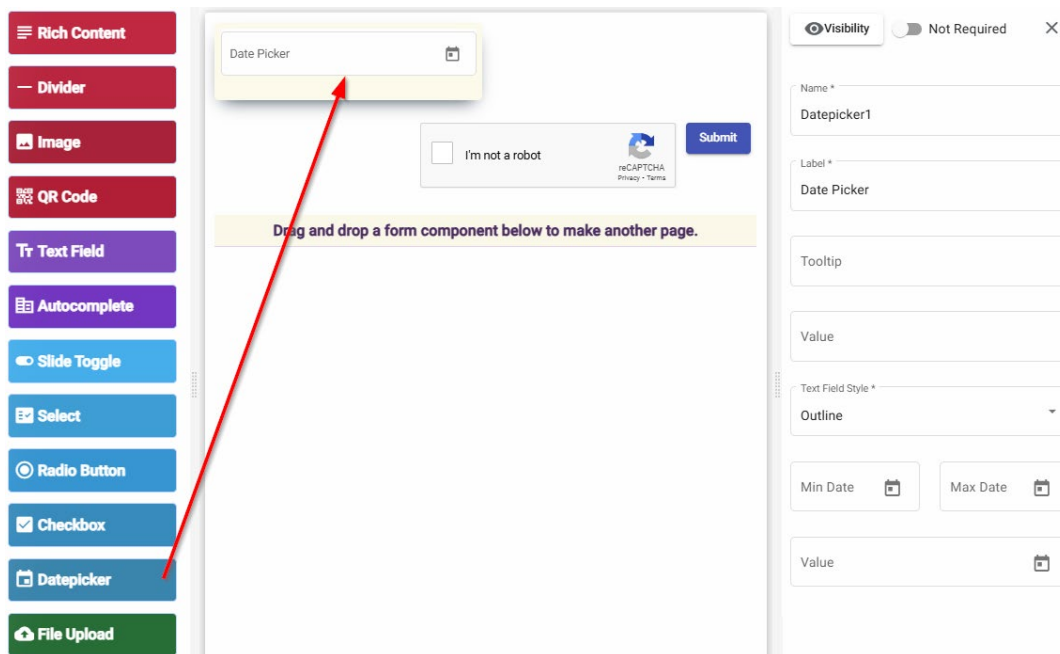
Single Bulk

Option 1  
Option 2  
Option 3

Ok Cancel

## DATEPICKER COMPONENT

The **DatePicker** component allows the selection of a date in mm/dd/yyyy format.



Rich Content

Divider

Image

QR Code

Text Field

Autocomplete

Slide Toggle

Select

Radio Button

Checkbox

DatePicker

File Upload

Date Picker

I'm not a robot

reCAPTCHA

Submit

Drag and drop a form component below to make another page.

Visibility

Not Required

Name \*

DatePicker1

Label \*

Date Picker

Tooltip

Value

Text Field Style \*

Outline

Min Date

Max Date

Value

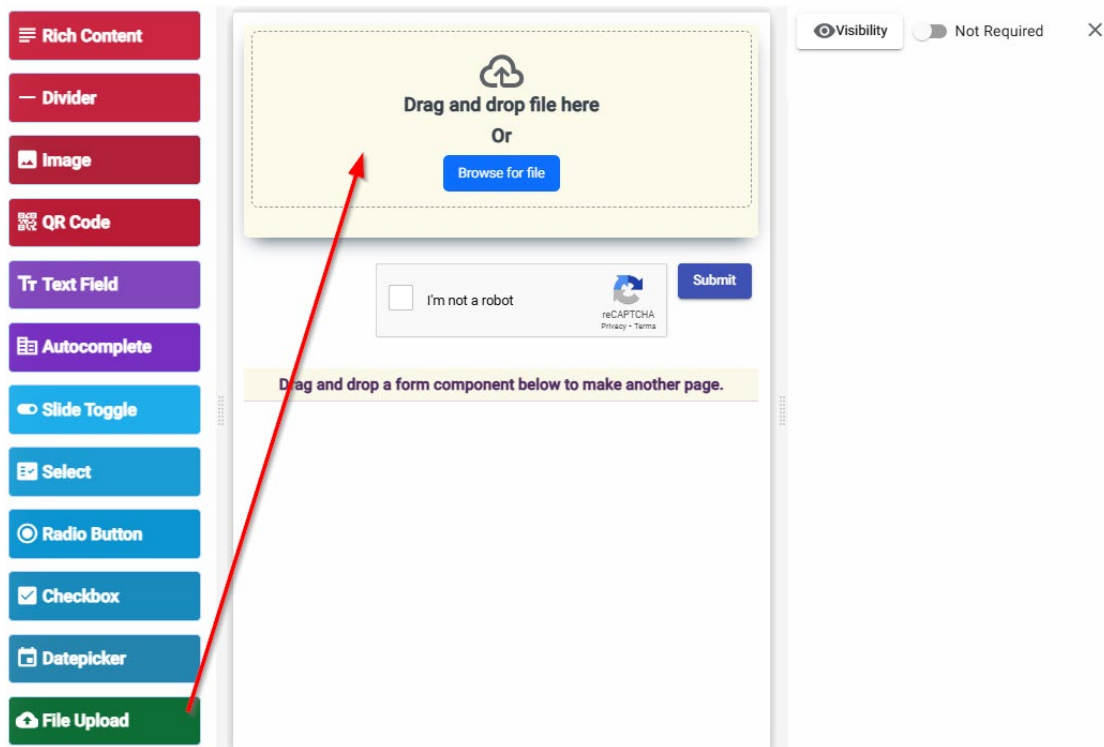
All additional components include:

- Name
  - » The internal name of the component. This field requires a value.
- Label
  - » This is the label that will be displayed for the component in the form. This field requires a value.
- Tooltip
  - » The description to display when a user hovers over the component.
- Value
  - » The date value that will be displayed by default.
- Text Field Style
  - » Includes:
    - Outline
    - Fill
    - Standard
    - Legacy
- Min Date
  - » The minimum date that a user can select.
- Max Date
  - » The maximum date that a user can select.
- Value
  - » The date value that will be displayed by default. You can use the calendar to select a date if desired.

## FILE UPLOAD

The **File Upload** component allows for users to upload a file into the form.

**NOTE:** Any files uploaded to the form will be attached on the message submission to the form recipient.



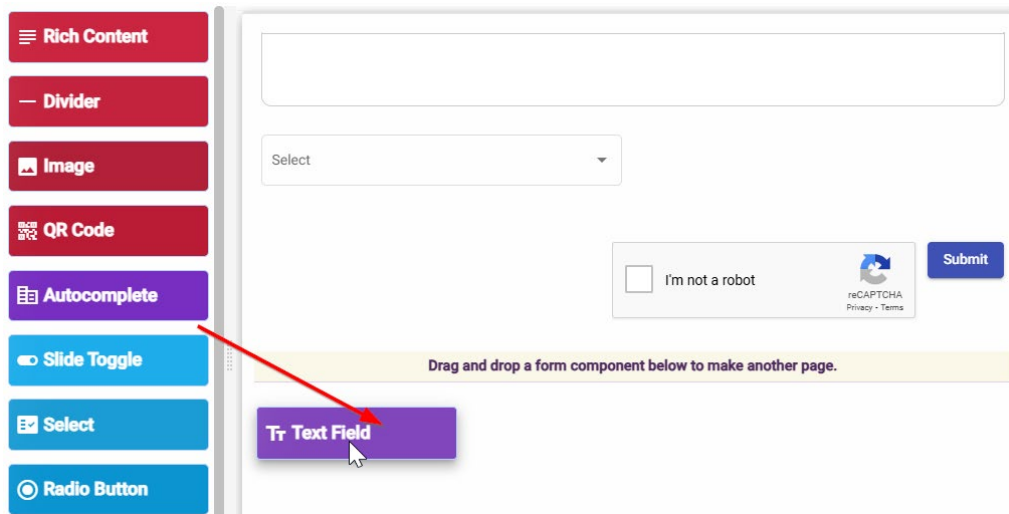
This component has no additional controls of any kind, but when it comes to the file uploads themselves there are a couple of things to take into consideration.

1. When a user uploads a file there are no restrictions on the number of files that can be uploaded.
2. Files that are uploaded (if multiple) must have unique file names.

## FORM PAGE CONTROL

While creating a form it is possible to create multiple pages in the event that your form requires a substantial number of components. This is done simply by dragging components to the bottom of the editor underneath the **Drag and drop a form component below to make another page** area of the editor.

**NOTE: You must at least a single component already placed into the editor in order to make an additional page.**



Once you have added a component below the specified area in the editor your form will have controls for configuring a **Next Page** and a **Previous Page**.

These controls appear on the right side of the editor in the same way that the Form Components do and include the ability to configure:

- Page Name
  - » The name for the specific page of the form.
- Label
  - » The label that will be shown in the Next Page or Previous Page button.
- Button Style

- » The appearance that the button will take. This has a few options and includes:
  - Raised
  - Basic
  - Stroked
  - Flat
- Color
  - » The color the button will take. This includes a few options such as:
    - Primary
    - Basic
    - Rose
    - Danger
- Show Previous Button
  - » This is a toggle to display the button that will take a user back to the previous page of the form. You can set this to off so that users may not return to previous pages.
- Label
  - » The label that will be shown in the Previous Page button.

**NOTE: On the final page or if there is only a single page for the form the Submit button and its label will be a part of these controls.**

When all of these controls are customized, you could have something like the following:

## VISIBILITY RULES FOR COMPONENTS

Every component where a value can be selected or inserted will allow for visibility rules to be set for the component. When the conditions of these rules are they will either reveal or hide the component. Any number of visibility rules can be created but each control can only have a single rule applied to it. The Visibility rules menu, considered the Rule Manager within the editor itself, can be reached from any component by clicking the appropriate icon which looks like this:



Once opened the Visibility rules menu (Rule Manager) will be displayed and look something like this:



**NOTE: Each rule must have a Query Name set before it can be saved.**

Within this menu you will be provided an editor where you can create queries containing numerous rules and rulesets which can be used and applied to component visibility. Each ruleset within a query can be either an And or an Or. When set to And every Rule within the Ruleset must be matched in order to trigger. When set to Or only one rule within a ruleset must be matched in order to trigger. You can mix and match these two option types when creating more complex queries that involve nesting.

## FORM USAGE OPTIONS

You can use your created forms in a variety of ways depending on the workflows that your organization requires. These options are discussed in detail in the below sections.

### LINKING TO YOUR FORMS

You can link directly to your forms on the DataMotion Secure Platform via standard HTML hyperlinks inserted on your website or any other area you desire. This is very simple code to insert, and you can even find this code via the Form Properties view. This can be done while editing a form by doing the following:

1. Access the Form Properties of your form.



2. Scroll (if applicable) to the bottom area of the Form Properties view to find the HyperLink section at the bottom left.
3. Take note of or click directly on the code referenced in the box to copy it.

#### HyperLink

```
<a target="_blank"
  href="https://scp-qa.datamotion.com/forms/Dn9jEjIF">
  Draft Form
</a>
```

You can insert this code snippet directly into the appropriate area of your website that you want users to access it from. Once clicked it will take users directly to the form on the DataMotion Secure Platform so that they can fill out and submit it to you.

### EMBEDDING YOUR FORMS

Another option is to embed and display your forms directly on your website. This option gives you greater control over your users experience with form entry and submission as they will never leave your own website or environment. You can reach the code for this option in the same way as the linking option by performing the following:

1. Access the Form Properties of your form.



2. Scroll (if applicable) to the bottom area of the Form Properties view to find the Embedded section at the bottom right.
3. Take note of or click directly on the code referenced in the box to copy it.

**Embedded**

```
<datamotion-launcher form="Dn9jEjIF"></datamotion-launcher>
<script async
  src="https://cdn-qa.datamotion.com/scp/datamotion-launcher.js">
</script>
```

Users will not need to access any other site using this method and once inserted you will have something like the below:

```
<html>
<head>
</head>
<body>
<datamotion-launcher form="Dn9jEjIF"></datamotion-launcher>
<script async
  src="https://cdn-qa.datamotion.com/scp/datamotion-launcher.js">
</script>
</body>
</html>
```

**FORM SUBMISSION EVENT CONTROLS**

These features are not explicitly included as part of the form editor however they provide certain users useful capabilities when creating and using forms on their own websites.

**PARENT PAGE SCROLL ON FORM SUBMISSION**

When you have a form inserted into your website via an iframe you can add the capability to page scroll your site. This can be done on form submission and once the user submits the form your site can scroll the page that the form is on back up to the top. Example code of integrating this feature into your site where the form is can be found below:

```
window.addEventListener('message', (event) => {
  if (event.data.type === 'datamotionFormSubmitted') {
    window.scrollTo({ top: 0, behavior: 'smooth' });
  }
});
```

\* \* \*

This concludes the *DataMotion Secure Platform Secure Forms Guide*.