MoJ Forms user guide

Last updated: 27 August 2021

What's new

27 August 2021 - Added a section on <u>required pages</u> to clarify that all forms must have a check answers page and confirmation page to successfully submit any user data they collect.

22 July 2021 - Updated the descriptions of Test and Live sites in <u>Testing and publishing</u>.

6 July 2021 - This guide now includes extra pointers on <u>using markdown to format content</u>.

11 June 2021 - We have added the ability to <u>ask users to attach files</u> to a form.

21 May 2021 - It's now possible to <u>make a question optional</u> so that a user can move on without answering it.

Getting started

Find out what MoJ Forms can do and how you can get started creating your own forms and services.

Introducing MoJ Forms

MoJ Forms enables you to design, test and publish online forms without the need to write code. It's quick and easy to use, making it ideal for prototyping, trialling different approaches to solving problems, running surveys, replacing and digitizing paper forms, supporting wider services and much more.

Everything you create with MoJ Forms:

- meets GOV.UK design patterns and standards
- is accessible and secure
- is hosted and supported by the MoJ Forms team

Current and upcoming features

MoJ Forms includes everything you need to design, test and publish simple forms and services right now. More complex capabilities will be added throughout 2021.

Feature	Available now	Coming soon
Multiple and flexible page templates	✔	
Basic form components (e.g. text, radio, checkbox, text area)	✔	
File upload	✔	
Content pages	✔	
Publish to a test environment	✔	
Publish to a live environment	✔	
Collect data by email	✔	
More components and templates		✔
Logic/branching		✔
Move pages		✔
Advanced validation options		✔

Co-editing with multiple users		✔
Connect with APIs		✔
Google Analytics		✔

Getting access and logging in

MoJ Forms is at https://moj-forms-editor.service.justice.gov.uk/.

To get access, contact us.

You will need an email address ending in either:

- @digital.justice.gov.uk
- @justice.gov.uk

We use a single shared login with your primary work email addresses so you won't need to remember a separate login.

Planning your first form

We've designed MoJ Forms to be quick and easy to use but it helps to plan out your form in advance. For help with this, read the Service Manual chapter on structuring forms.
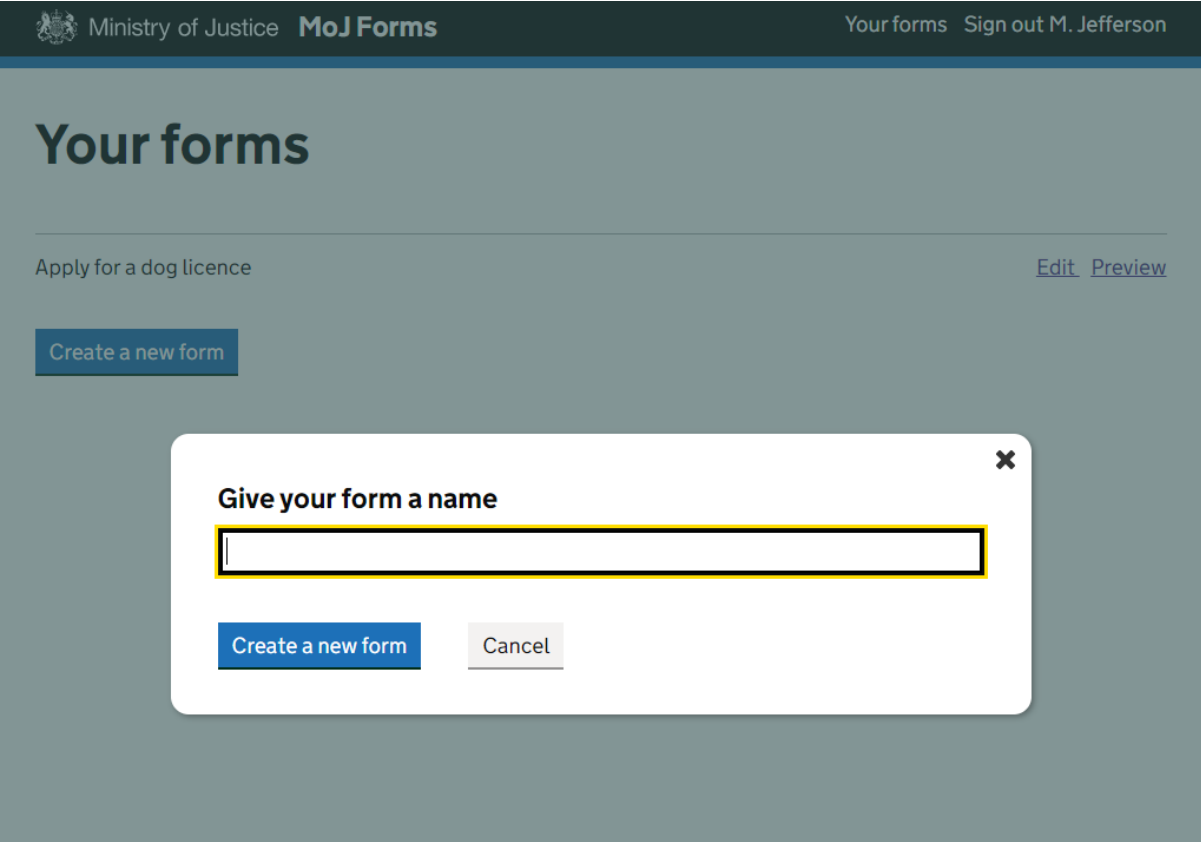
You should also refer to the Design System for advice and guidance on putting the various form components and patterns to use.

Creating and editing a form

Learn how to start building your first form.

Your form's name and URL

When you create a new form, you need to give it a name.

This name is:

- what your form will be listed as in the MoJ Forms editor
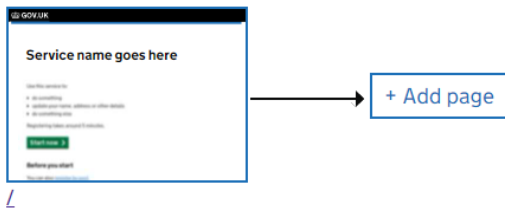- the title that will appear on your form
- used in your form's URL - for example, a name of Apply for a dog licence will produce a form URL of https://apply-for-a-dog-licence.form.service.gov.uk

If you need to change the name of your form later, contact us.

The start page

When you create a new form, you are set up with a start page. This will be your form's home page.

All forms built using MoJ Forms must have a start page. To find out more about what should go on your start page, read the [Design System guidance](#).

Required pages

For your form to successfully submit the user data it collects, it must have:

- a check answers page - this should come after any question pages
- a confirmation page - this should come immediately after the check answers page

Adding pages

You can add pages to your form in 2 ways:

- at the end of your form flow, using the 'add page' button
- after any existing page in your form flow, by hovering over the page thumbnail to reveal the menu (3 dots in a circle) and selecting 'add page here'

When you add a new page, you need to give it a name. This will be the page's URL slug so should be in lower case with no spaces or special characters. Separate words with hyphens. For example, in the following URL, the page name is 'your-details':

https://apply-for-a-dog-licence.form.service.gov.uk/your-details

Some names are reserved for global pages and should not be used:

- metrics
- ping
- health
- accessibility
- cookies
- privacy
- maintenance
- reserved
- dashboard
- admin

It is not currently possible to change the name of a page once you have created it.

Deleting pages

You can delete a page from the form flow view by hovering over the page thumbnail to reveal the menu (3 dots in a circle) and selecting 'delete page'. This cannot be undone.
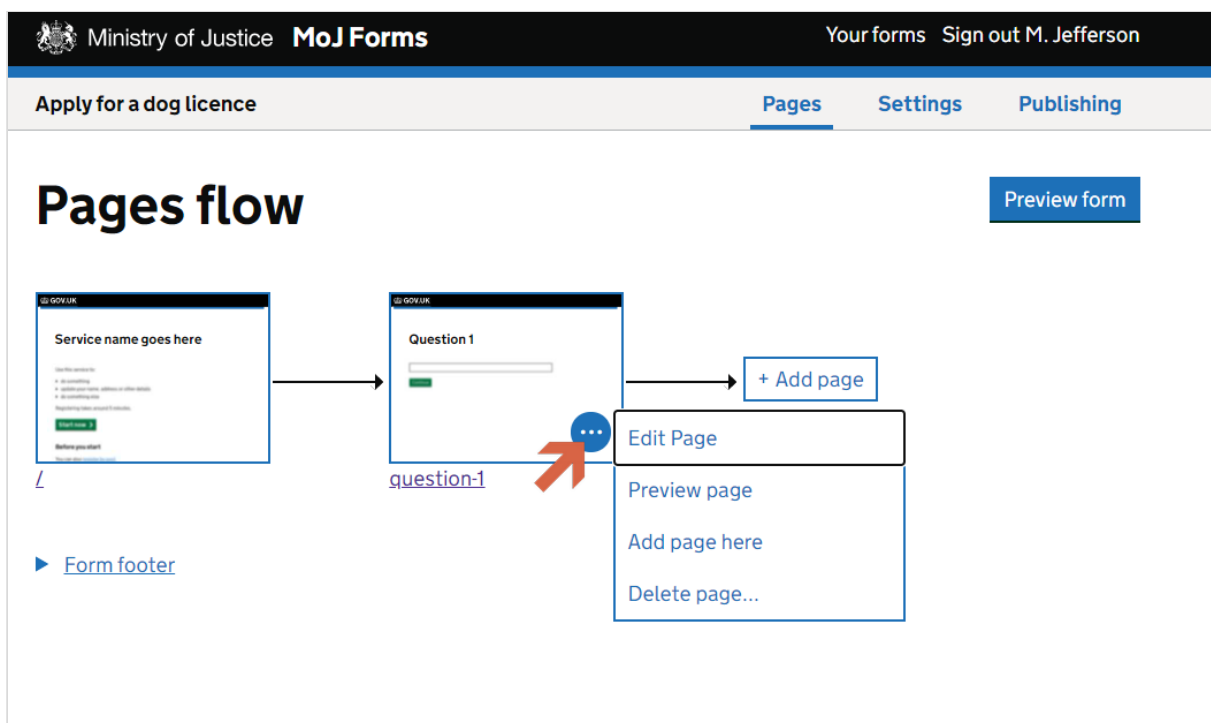
Choosing the type of page

When adding pages, you can choose from the following templates:

- Single question page - as the name suggests, this template allows one question per page. You can choose from several question types:
  - text
  - text area
  - number
  - date
  - radio buttons
  - checkboxes
  - file upload
- Multiple question page - this template allows you to add several question components to a single page. You can use any of the question types available on a single question page.
- Check answers page - use this page to let users check the information they have provided. If your form requires users to submit any information, it will need a check answers page.
- Confirmation page - use this page after a check answers page to let users know they have completed their task.
- Content page - use this page to provide users with information. For example, it can be used in place of a confirmation page if users are not required to submit information. [You can format content using markdown](#) - a simple way of indicating things like headings, links and tables using text symbols.

Choosing which question format to use

You can use the following question types on single and multiple question pages:

- [text](#)
- [text area](#)
- [number](#)
- [date](#)
- [radio buttons](#)
- [checkboxes](#)

The [file upload](#) question type can be used on a single question page only.

We will be adding more question types as well as including options for validation and formatting in future updates.

Asking users to submit a file

The file upload question type allows you to ask users to attach a file to their form. It supports the following file formats up to 7MB in size:

- portable document format (.pdf)

- comma-separated values (.csv)
- images (.jpg, .jpeg, .png)
- MS Excel (.xls, xlsx)
- MS Word (.doc, .docx)
- Open Office (.odt, .ods)
- plain text (.txt)
- rich text (.rtf)

The component allows users to upload only one file per page. To collect additional files, you will need to add extra file upload pages.

Making a question optional

All questions are required by default but you can switch this setting off to make a question optional. This can be done with both single question pages and individual questions on multi-question pages.

To make a question optional, first click in the question title as if you are going to edit it. This highlights the component settings menu (a circle with 3 dots in it). Clicking on the menu will open it.

It looks like this:

For now, there is only one setting, called 'Required'. Click on this setting to open the options, where you can set it to either 'yes' (required) or 'no'.

MoJ Forms automatically adds '(optional)' onto the end of any question that isn't required.

Formatting content with markdown

In most cases, you won't have to worry about formatting. The page templates include fields for headings, labels and hint text and all you have to do is add your own words.

Content areas allow you to use markdown to add your own formatting. These are on every content page and can be added to some other page templates as required.

Markdown is a way of adding formatting to plain text using basic symbols and patterns. With markdown, you can add headings, links, lists, tables and more. For example, to create a bulleted list, you start each item with an asterisk (*). Here is a selection of the most common markdown elements:

Formatting	Markdown	Example
Headings	Put 2, 3 or 4 hashtags at the beginning of your header,	## Level 2 heading ### Level 3 heading

|	depending on the level of heading you need.	#### Level 4 heading
Bold	Put the words you want to make bold inside double asterisks.	make **these words** bold
Italic	Put the words you want in italics inside single asterisks.	make *these words* italic
Bullets	Put an asterisk (or a hyphen) at the start of each item in your list and leave blank lines at the beginning and end of the list.	Bulleted lists look like this: * list item 1 * list item 2 * list item 3
Numbering	Put a number with a full stop and space at the start of each item and leave blank lines at the beginning and end of the list.	Numbered lists look like this: 1. list item 1 2. list item 2 3. list item 3
Web links	Put the link text in square brackets followed immediately by the link url in round brackets.	[link to GOV.UK](https://www.gov.uk/)
Email links	Put 'less than' and 'greater than' signs around the email address.	<email@address.com>
Tables	Use dividers (or 'pipes') to split your content into columns and start each row on a new line. Make sure each row has the same number of columns. Put hyphens in the second row to make the first row a header row. Leave blank lines at the beginning and end of the table. (Tables do not currently display in the correct GOV.UK style.)	2 columns: | Header 1 | Header 2 | | -------- | -------- | | Cell | Cell | | Cell | Cell | 3 columns: | Header 1 | Header 2 | Header 3 | | -------- | -------- | -------- | | Cell | Cell | Cell | | Cell | Cell | Cell |

For the full range of markdown options available, see this markdown guide.

Adding footer pages

All forms are created with 3 standard footer pages:

- cookies
- privacy
- accessibility

These are listed under the form footer link on your form's main page.
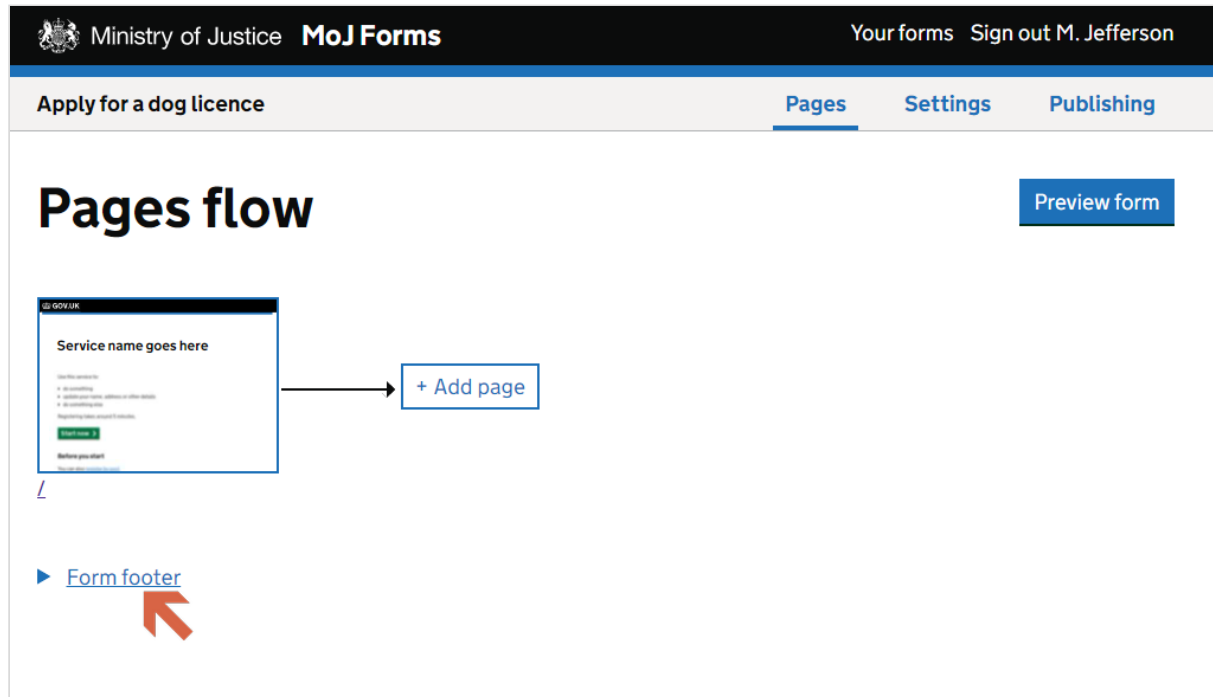
These pages are a legal requirement for any form you plan to publish. You will be able to add additional footer pages in future updates.

The cookies page is ready to publish and does not require any input from you. The privacy and accessibility pages contain template statements that you will need to review and update.

There is more information on accessibility and privacy below.

These pages are formatted using markdown. See formatting content for more information.

Saving your changes

Whenever you make a change to a page, a save button will appear in the top right corner. You must save changes before leaving a page or your changes will be lost. Currently, you will not be warned of unsaved changes when you leave a page.

Previewing your form in the editor

You can preview your form from the main page using the preview button in the top right corner.

Preview allows you to quickly check what your form looks like and how the questions work but it doesn't allow you to submit any data or share it with colleagues. To do this, you will need to publish your form to the Test site.

Session duration

If you are inactive for 90 minutes, you will be logged out of MoJ Forms. Any unsaved changes will be lost.

Doing anything in MoJ Forms, such as opening a page or taking an action, will reset the timer.

The [session duration of a form is 30 minutes](#), including when you are previewing a form, to help protect user data.

Ensuring your form is accessible

Any form you publish must meet government accessibility regulations. MoJ Forms does most of the work to ensure that your form is accessible but you are ultimately responsible.

There are 3 things you need to do before publishing your form:

- ensure that your content is accessible
- perform a basic accessibility check of your form
- complete your form's accessibility statement

You should follow these steps with any updates to your form, as well as when you first publish it.

Accessible content

We have built MoJ Forms to produce accessible pages but the content needs to be accessible too. As you build your form, ensure that all of your page titles and headings are unique and informative, that you give meaningful hints and link text, and keep content clear and concise.

Read the Web Accessibility Initiative writing tips for more advice.

Basic accessibility checks

As you are getting ready to publish your form, we recommend you perform a basic accessibility check. GDS has written a guide to doing basic accessibility checks.

There are only a few things you need to check as an MoJ Forms editor. For each page:

- check you're using proper headings
- check that links make sense
- check that pages have good titles
- check it's clear what information users need to provide
- check that any error messages are helpful

The Wave web accessibility evaluation tool can help you with this.

Accessibility statements

All forms are created with an accessibility page in the footer section which comes pre-populated with a template accessibility statement. There are sections in the statement

that you must fill in with details specific to your team and form. These are indicated in square brackets - [like this].

If you are updating an existing form, you will need to check your accessibility statement against the [latest version of the template](#) as some sections may have changed.

Protecting your users' information

You have a legal duty to protect any user information that you collect with your forms.

We are responsible for the security of the MoJ Forms platform and take every precaution with user data as users enter it. We encrypt all user data and do not retain any of it after the form has been submitted.

You are responsible for:

- ensuring that you collect the minimum amount of information necessary
- making it as easy as possible for users understand why you are collecting information and how you will use it
- the security of user information after it has been submitted

This includes producing a privacy notice.

For more guidance on this topic, see the [Service Manual guidelines on collecting personal information](#).

Privacy notices

All forms are created with a privacy page in the footer section which comes pre-populated with a template privacy notice. There are sections in the notice that you must fill in with details specific to your team and form. These are indicated in square brackets - [like this].

We recommend you consult your [information assurance lead](#) or the data privacy team (privacy@justice.gov.uk) for help completing the template.

Session duration

To help protect users' privacy, if they are inactive on a form for 30 minutes the form will reset and any information they have entered up to that point will be cleared. Users are shown a warning and countdown 5 minutes before this happens.

Managing your form's settings

The settings enable you to change your form's name and configure the email that will be sent when users of your form submit their information. More settings will be added in future updates.

Form details (form name)

This setting enables you to change your form's name. It will change:

- the name of your form in MoJ Forms editor
- the title that appears on your form
- your form's name in the final URL

You should only change your form's name up until the point when you first publish it. Changing it after this point may cause problems for your users.

Submission actions (email settings)

This section controls what happens to a user's data when they submit their form. Currently, the only option is to send it by email as a PDF attachment to an address of your choice. Other options, including API integration, are in development.

When you check the 'send by email' box, you also need to provide an email address. You do this by selecting 'configure', which allows you to customise the email in several ways:
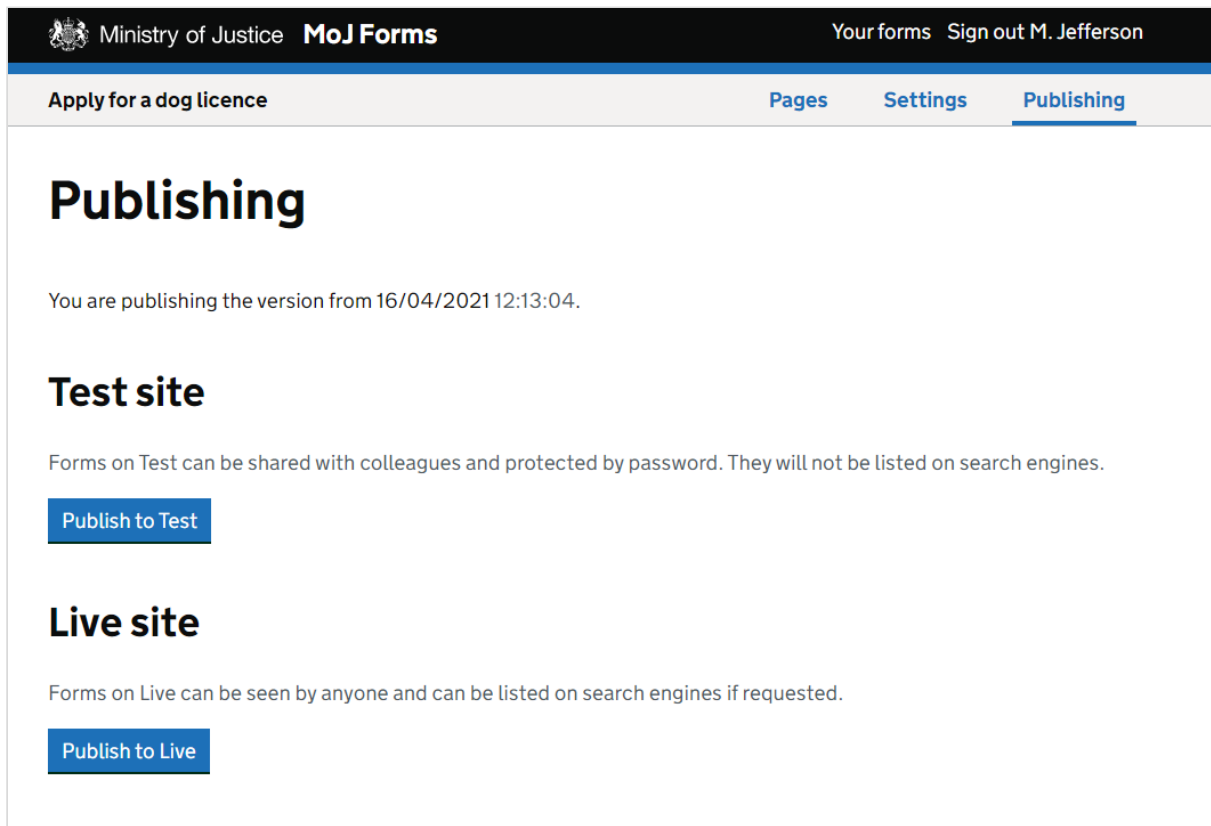
- send email to - the email address you want the emails sent to
- email subject - the subject line of the email
- email text - any specific text you want in the body of the email
- PDF attachment heading - this will appear in the PDF of your user's answers
- PDF attachment subheading - this will appear in the PDF of your user's answers

You need to configure the email settings for both the Test site and Live site separately.

Testing and publishing

How to test your form and share it securely with colleagues before publishing the final version.

Understanding the publishing process

MoJ Forms comes with both a Test site and Live site.

The Test site is for checking your form, sharing it with colleagues and stakeholders and gathering feedback. You can make multiple changes and updates to the Test site without needing to publish to Live.

The Live site is where your final form will live. You only need to publish to Live when you are happy with your form on the Test site.

Both the Test and Live sites:

- are on the internet, so there are no restrictions on who you can share the links with
- can be password protected so only the people you provide with login details can access them
- will not be found and listed on search engines

We recommend you always publish and test your form on the Test site before publishing to Live.

Publishing to Test

To publish your form to the Test site, go to the publishing page and select 'publish to Test'.

This will publish the latest version of your form in the editor to the Test site. You can see when your form was last updated by checking the 'version' date and time at the top of the page.

After selecting 'publish to Test', you will be presented with 2 options:

- allow anyone with the link to view
- set a username and password

If you set a username and password, you will need to share these with anyone you want to view the form. If you forget what username and password you set, you can simply re-publish your form and set new details. These will replace your previous username and password.

After publishing to Test, your form's URL will be available from the publishing page.

It can take up to 15 minutes for the form to be visible the first time you publish it to Test. Updates are much quicker and should publish within a minute or less. (You may need to refresh your browser or clear your cache.)

Publishing to Live

To publish your form to the Live site, go to the publishing page and select 'publish to Live'.

This will publish the latest version of your form in the editor to the Test site. You can see when your form was last updated by checking the 'version' date and time at the top of the page.

After selecting 'publish to Live', you will be presented with 2 options:

- allow anyone with the link to view
- set a username and password

If you set a username and password, you will need to share these with anyone you want to view the form. If you forget what username and password you set, you can simply re-publish your form and set new details. These will replace your previous username and password.

After publishing to Live, your form's URL will be available from the publishing page.

It can take up to 15 minutes for the form to be visible the first time you publish it to Live. Updates are much quicker and should appear within a minute or less. (You may need to refresh your browser or clear your cache.)

Help and support

Where to report problems and get help when you need it.

Known issues and workarounds

MoJ Forms is a new service with a range of features that we are working to expand. In the short term, you might encounter some limitations. These include:

- renaming, moving and deleting pages is not currently possible
- deleting and unpublishing forms (remove them from the live site) is not currently possible
- changing the URL of your form, either before or after it has been published, is not currently possible
- tables created using markdown are not displayed in GOV.UK style

Contact us for help if you need to do any of these things.

Report a bug

If you think you have found a bug (something doesn't work as you expected), send an email to form-builder-team@digital.justice.gov.uk or contact us on the Slack channel #ask-formbuilder on mojdt.slack.com.

Make sure to include:

- what you expected to happen
- what actually happened
- what steps to take to reproduce the behaviour
- the browser version and operating system you are using
- screenshots of any relevant pages and messages

Give feedback

You can send feedback at any time using the red feedback widget on the right hand side of the screen, as shown here:

This will appear on every page, so you can provide feedback wherever you are on absolutely anything.

Certain actions or URLs may trigger specific questions from us. You'll see these as on-page surveys.

Contact us

Get in touch with any questions or issues:

- Email: form-builder-team@digital.justice.gov.uk
- Slack channel: #ask-formbuilder on mojdt.slack.com

We will respond as soon as possible within office hours, Monday to Friday.

Feedback on this guide

Let us know if you have any questions or feedback about this guide:

- email: mark.jefferson@digital.justice.gov.uk
- Slack: markjefferson_content on mojdt.slack.com