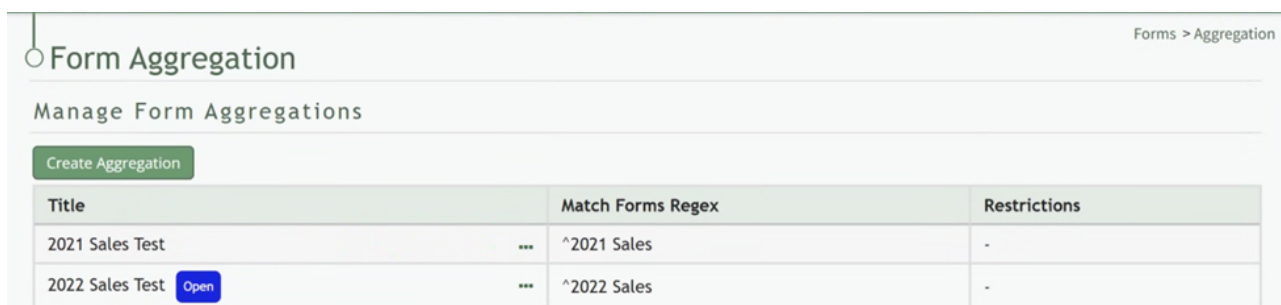


# Understanding Form Aggregations

An aggregation is a report generated from form data. Form aggregations take the information from similar forms and aggregates them into one form. (For example, three monthly forms can be aggregated together to create one quarterly aggregation report.) The original forms will still exist independently after aggregation.



The screenshot shows a web interface titled "Form Aggregation" with a breadcrumb "Forms > Aggregation". Below the title is a "Manage Form Aggregations" section with a "Create Aggregation" button. A table lists two existing aggregations:

Title	Match Forms Regex	Restrictions
2021 Sales Test	... ^2021 Sales	-
2022 Sales Test <a href="#">Open</a>	... ^2022 Sales	-

Once forms have been aggregated, new data cannot be added to the aggregation. New inputs into the forms will be taken into account when the aggregation report is rerun.

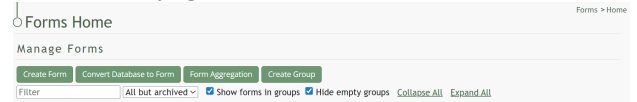
Aggregation Context Menu Explanation	
Option	Explanation
Run Report	Selecting "Run Report" from the context menu will run the aggregation report, opening the report of the data aggregated from the forms in the same tab.

## Form Aggregation Properties

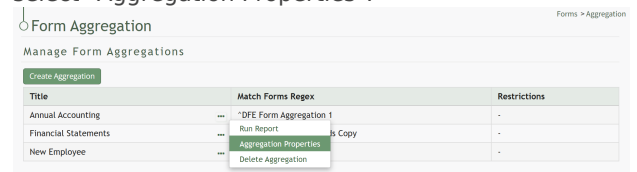
Selecting "Form Aggregation Properties" from the context menu will open the Form Aggregation Properties Modal allowing you to make desired changes to the form aggregation.

### How To: Edit a Form Aggregation

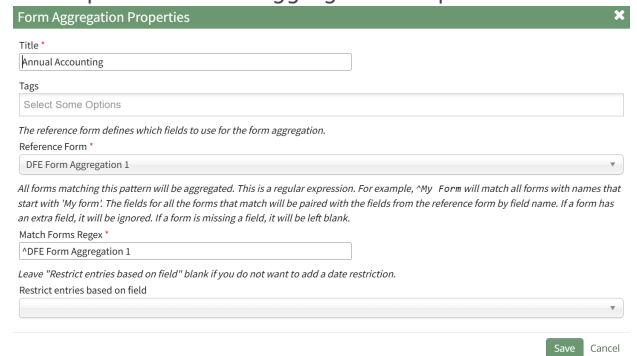
To edit a form aggregation, open the Home Page of the Forms Module and click the Form Aggregation beneath the page header.



This opens the Form Aggregation Page. Click the three-dot icon to the right of the aggregation you wish to edit opening the Aggregation Context Menu and select "Aggregation Properties".



This opens the Form Aggregation Properties Modal.

A screenshot of the 'Form Aggregation Properties' modal. It has a title bar 'Form Aggregation Properties' with a close button. The form contains: a 'Title' field with 'Annual Accounting'; a 'Tags' field with 'Select Some Options'; a 'Reference Form' dropdown menu with 'DFE Form Aggregation 1' selected; a 'Match Forms Regex' field with '^DFE Form Aggregation 1'; and a 'Restrict entries based on field' dropdown menu. At the bottom right are 'Save' and 'Cancel' buttons.

The reference form defines which fields to use for the form aggregation.

All forms matching this pattern will be aggregated. This is a regular expression. For example, "My Form" will match all forms with names that start with "My Form". The fields for all the forms that match will be paired with the fields from the reference form by field name. If a form has an extra field, it will be ignored. If a form is missing a field, it will be left blank.

Leave "Restrict entries based on field" blank if you do not want to add a date restriction.

Edit the form aggregation as needed and select the Save button. Your changes will be saved.

## Delete Aggregation

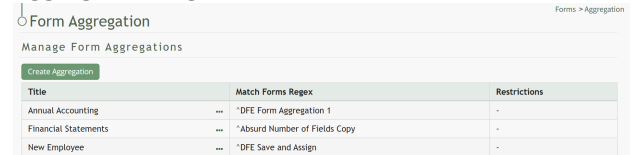
Selecting "Delete Aggregation" from the context menu will open the Deletion Confirmation Modal which states the aggregation title and asks, "Are you sure you want to delete this Form Aggregation?"

### How To: Delete a Form Aggregation

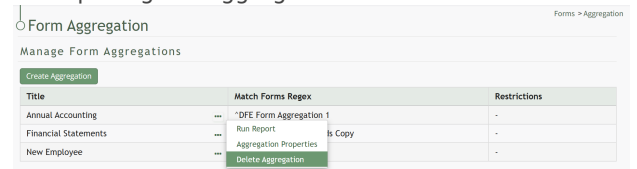
To delete a form aggregation, open the Home Page of the Forms Module from the Main Menu.



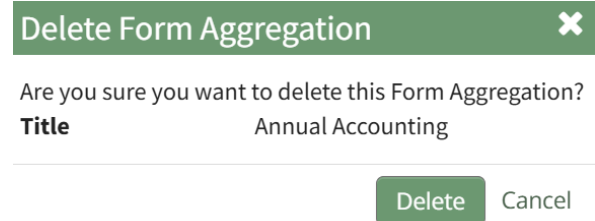
Click the Form Aggregation button opening the Form Aggregation Page.



Click the three-dot icon to the right of the aggregation title opening the Aggregation Context Menu.



Select the option to Delete Aggregation opening the Delete Form Aggregation Modal.



The modal states the form aggregation title and asks, "Are you sure you want to delete this Form Aggregation?" Click the Delete button and the aggregation is removed from the table.

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