Form Engine Guide

Contents

Introduction

The Form Library is an easy-to-use tool that makes it easy to design, organize, and implement customized online forms. With this tool, you can create your own custom forms for your website, allow visitors to submit the form online, and track all visitor submissions. The Form Builder also offers many different features and options during both the form creation process as well as the form submission steps. The Form Builder streamlines the online form creation and organization process. Some of the ways in which the Form Builder component is important are:

- **Online creation and submission of forms**: Form design and submission tracking can be completely handled online – no additional software installations or localized files are required.

- **Forms can be fully customized**: The Form Builder features a similar Rich Text editor as the web content editor, allowing you to design and customize your submission forms any way you choose!

- **Easy-to-use reporting options**: Form submission results can be saved online, emailed, and exported to a spreadsheet file for reporting and tracking purposes.

Form Building Basics

There are two components to the Form system – the **Form Template** and the **Form Instance** – and it is important to understand the distinction between the two.
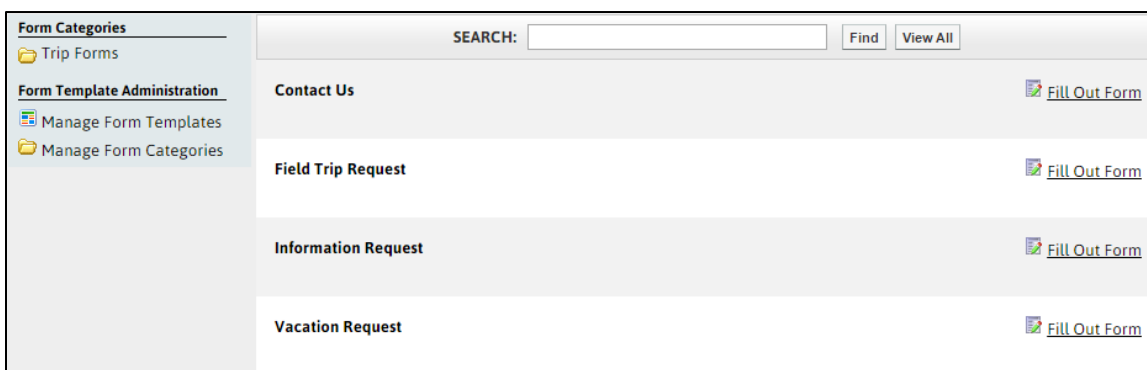
About Form Templates

Form Templates are templates that are used as a standardized form from which individual form instances can be generated. They can also be copied and changed to create other new form templates. The form template acts as a master copy of the form and individual submissions are copies of the template. Any changes made to the form template will result in a change to all future submissions for that form.

About Form Instances

Form Instances are submitted copies of the form template that include the submission information. Changes to form instances can only be made in the submitted information field.

Accessing the Form Library

The Form Library can be accessed by adding the **/form** extension to your website domain URL, in the address bar. For example, if your domain is www.yourdomainhere.com, then the URL to access the Form Library would be www.yourdomainhere.com/form

From the Form Library, users can search among the forms available and are able to click **Fill Out Form** to fill out any of the forms they have access to fill out.

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Managing Form Templates

Adding a Form Template

At the form library, click **Manage Form Templates**. This brings you to a list of all the Form Templates in the current category. Clicking on **Add Form Template** will open up the Rich Text editor where you can design and create your custom online form.

Enter a **Name** for your form. This will be the display name for your form. On sites with multiple language support, **Locale** is used to describe the language of the form.

To add the template to one or more categories, click the 📁 icon to the right of the **Category** field. A list of categories and subcategories will appear.

The **Template Content** area is the body of your form. The Rich Text editor grants you the ability and freedom to design the form as you choose. You may design and customize the form to your specifications.

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In addition to the normal formatting functions available in the Rich Text editor, additional *form-only* features are included in the editor.

ICON	DEFINITION	FUNCTION
☑	Checkbox	Inserts a checkbox.
◉	Radio Button	Makes a button for selecting a single option among a group of options.
🔲	Text Field	Creates a field for text input.
🔲	Text Area	Makes a field for text input with multiple rows.
🔽	Selection Field	Creates a drop-down menu box.
🔲	Hidden Field	A hidden field the user cannot see.

The next section will go into more detail on how to set up each of these individual form input components.

The **On Submission** area gives options that allow you to control how the form submissions are saved.

| On Submission	○ Do not save Data ● Save data to default location ○ Save data to specified folder ○ Save and attach to specified Workflow
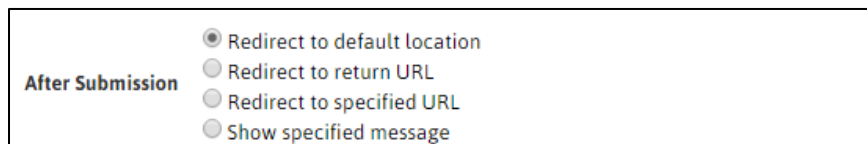
- **Save data to default location** will save the form submissions in the Form Builder along with the template.

- **Do Not Save Data** can only be selected if the Email Notifications are enabled; there will not be any online record of the submission if this option is selected.

- **Save data to specified folder** will save each Form Submission as an entry in a folder in the Workspaces or eLearning Server.

- **Save and attach to specified Workflow** connects the form submission to a workflow which can be used to trigger a series of tasks.

You can use the **Auto-Email** field to send an automated email response to the user after they fill out the form. Select the **Email Field** where the user enters their email address, fill out the **Email Body** and, if you wish, specify that the user will also be sent a copy of their submission (via the **Include form data** option).

If you want guest users to have to fill out a CAPTCHA, check **Enable security measure on Guest users**. This can help prevent spam-bots from sending in automated submissions to your form.

The **After Submission** area allows the author of the form template to specify what a user sees after the form has been submitted. If the form was filled out from the /form area then by 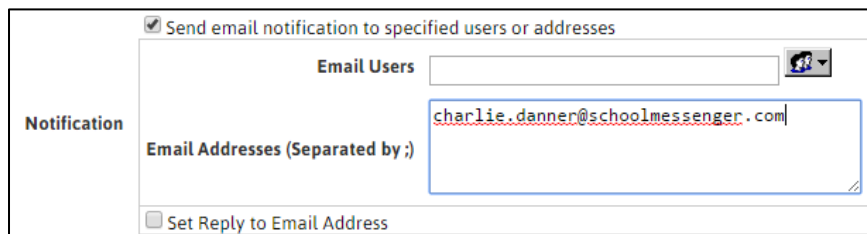default, after filling out the form, the user will be taken back to the /form area. If the form was added to a page via a Form Portlet, then, by default, the page will reload after the user submits the form.

The user can be redirected to a specific URL once the form has been filled out. **Show Specified Message** will display a custom message after the form is submitted before returning the user to the default location.

You can select **Send email notification to specified users or addresses** to send an email with the form contents each time the form is submitted. To add users already on the site, click on to open the user picker. When the pop-up window appears, select the groups and site users to be emailed on form submission and click **Add**. Once all the users to be contacted have been added to the list at the bottom half of the user picker, select **OK**.

To add e-mail addresses not associated with user accounts on the site, enter them into the Email Addresses field. If there are multiple addresses, they should be separated by a semi-colon (**;**). In email notifications, the **Title** field appears as the subject line of the notification message.

Once the information has been filled out, click the **Validation Check** button to ensure that all the input fields have been configured correctly. If any fields require additional configuration, a message will be displayed above the Rich Text editor area, detailing the necessary changes. Complete the configurations and click the **Validation Check** button again. When the *Successful* indication text appears, click the **Next** button.

Check off any fields you wish to be mandatory. A form cannot be submitted unless the mandatory fields are populated. You can also enter in a customized **Error Message** to display when the **Mandatory** fields are missing on submission.

MANDATORY INPUT		
Input Name	**Mandatory**	**Error Message**
Name	☐	
email	☑	Please enter your email address.
supervisor	☐	
vacationtype	☐	
VacationStart	☐	
vacationend	☐	
otherinfo	☐	
		Back Publish Form Template Cancel

Click **Publish Form Template** to create the new form template. This will create the first **version** of your form template. To continue editing the form template before publishing, click **Back** to return to the editor page.

Editing a Form Template

Click the name of the custom form you wish to edit in the **Manage Form Templates** interface. This opens up the **View** page.

| View | Edit | Revisions | Filter Fields | Submissions | Security | Activity |

VACATION REQUEST

Name	
Email Address	
Supervisor	Charlie Danner ▼
Vacation Type	Paid ○ Unpaid ○
Vacation Start Date	
Vacation End Date	
Any Other Relevant Information?	

Source

Click the **Edit** tab to access the Rich Text Editor. **Editing** the form allows you to rename your form, change or add input fields, as well as reorganize the layout of the form.

Apply any desired changes to your form template. Click on the **Next** button to proceed.

Apply any changes to the **Mandatory** checkboxes or **Error Message** fields. Click the **Publish Form Template** button to publish the changes.

💡 *Note: The **Save As Draft** button can be used to save any changes you've made without creating a new version of the form. This feature when you want to make additional changes to the form are required before publishing the new version.*

Configuring Form Template Input Fields

The most important elements in designing a custom online form are the input fields. These are the areas that will take a user's input on submission. Depending on the type of input field, the configuration may differ slightly.
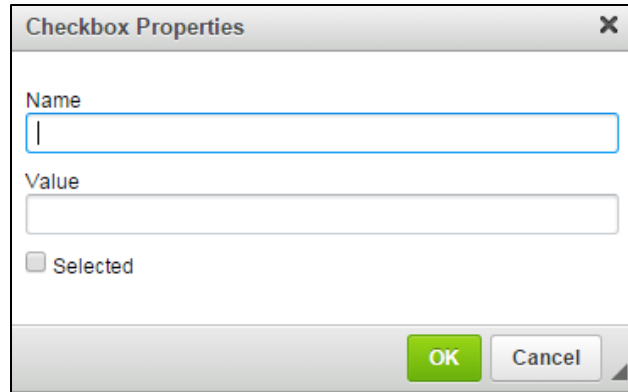
☑ Checkbox Field

The checkbox field puts a checkbox on your custom online form. The checkbox can be either *Selected* or *Not Selected*, and the **Value** of the checkbox is displayed when it is submitted as *Selected*.

When the **Checkbox** button is selected in the editor, a pop-up window appears that prompts for these values:

- **Name**: The display name of the input field as it would appear in submission reports. The **Name** field is not case-sensitive and should not include any special characters or spaces. Underscores "_" are accepted.

- **Value**: The display value in submission reports when the checkbox is *Selected.*

- **Selected**: Sets whether the checkbox is *Selected* by default.

It is also possible to access the checkbox properties window by right-clicking on the checkbox, and selecting **Checkbox Properties**.

Enter the **Name** and **Value** for your checkbox. You can also specify if you want the checkbox to be selected by default by checking the **Selected** checkbox.
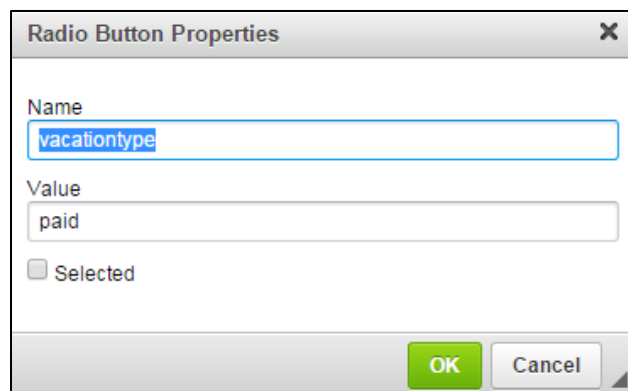
Click **OK**.

⦿ Radio Button

Radio buttons can be set up to allow users to select one option from a list of choices. Radio buttons are similar to checkboxes, but are generally not used as standalone input fields. Radio buttons are great for multiple-choice questions where the user selects one option.

When the **Radio Button** icon is selected in the editor, a pop-up window appears that prompts for these values:

- **Name**: The display name of the input field as it would appear in submission reports. The **Name** field is not case-sensitive and should not include any special characters or spaces. Underscores are allowed however.

- **Value**: The display value in submission reports when the radio button is *Selected.*

- **Selected**: Sets whether the radio button is *Selected* by default.

You can also access the radio button properties window by right-clicking on the radio button and clicking **Radio Button Properties**.

Enter the **Name** and **Value** for your radio button. You can also specify if you want the radio button to be selected by default by checking the **Selected** checkbox.

Click **OK**.

To group a set of radio buttons so that users can only select one of the choices in a group, the **Name** of each of those radio buttons must be exactly the same. The **Value** field will indicate which of the options was selected.
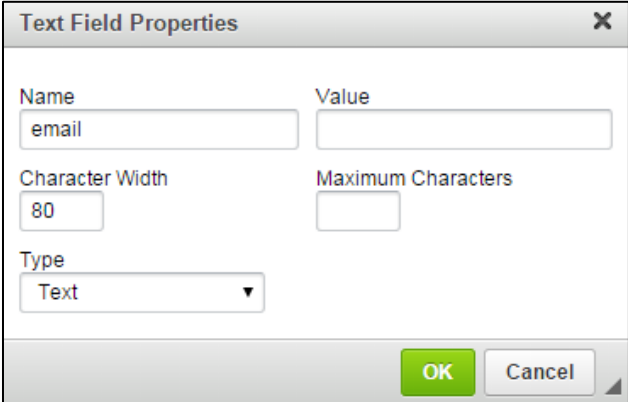
⬚ Text Field

A text field can take any input and store that submission. Text fields offer a single line of input, and can be configured to allow a set number of characters or be without limit.

When the **Text Field** button is selected in the editor, a pop-up window appears that prompts for these values:

- **Name**: The display name of the input field as it would appear in submission reports. The **Name** field is not case-sensitive, and should not include any special characters or spaces. Underscores "_" are accepted.

- **Value**: The default value to display in the text field. Setting a default value is optional.

- **Character Width**: The display width of the text field, in character spaces.

- **Maximum Characters**: The maximum number of characters to allow on input.

- **Type**: Choose the sort of data that will be entered in the field.

It is also possible to access the text field properties window by right-clicking on the text field, and selecting **Text Field Properties**.

Enter the **Name** and **Value** for your text field. You can also define the **Character Width** and **Maximum Characters** for the text field – if you do not specify values for these fields, they will be set to their default values.

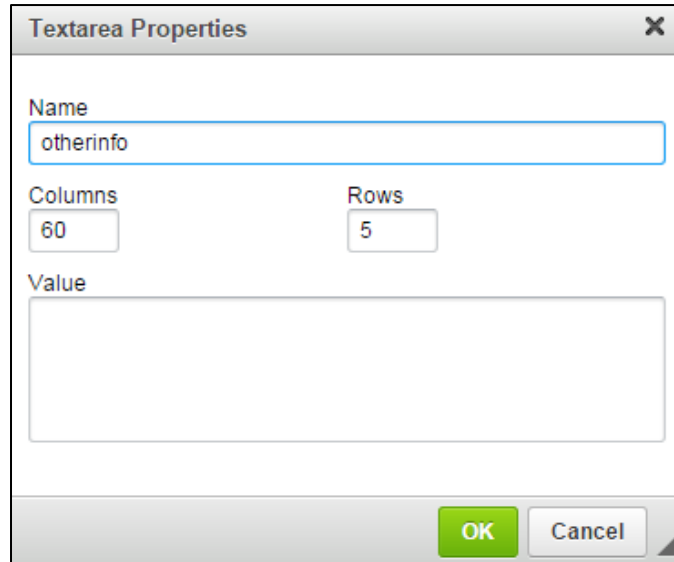Select the **Type** of input and click **OK**.

⬚ Text Area

The text area input field is an extension of the text field and allows for a large block of content instead of limiting input to a single line. You can configure the size of the text area to be as large or as little you like.

When the **Text Area** button is selected in the editor, a pop-up window appears that prompts for these values:

- **Name**: The display name of the input field as it would appear in submission reports. The **Name** field is not case-sensitive and should not include any special characters or spaces. Underscores "_" are accepted.

- **Columns**: The width of the text area to display, measured in character spaces.

- **Rows**: The number of rows of the text area to display.

- **Value**: The default value to display in the text area. This is optional.

It is also possible to access the text field properties window by right-clicking on the text field, and selecting **Text Area Properties**.

Enter the **Name** of your text area. You can also define the number of **Columns** and **Rows** and set a default **Value**. If you do not specify values for these fields, they will be set to their default values.

Textarea Properties ✕

Name
otherinfo

Columns   Rows
60   5

Value

[OK] [Cancel]

Click **OK**.

Selection Field

The selection field can be configured as a drop-down menu, a single item selection box, or a multiple item selection box.

When you click the **Selection Field** button, the selection field properties window pops up.
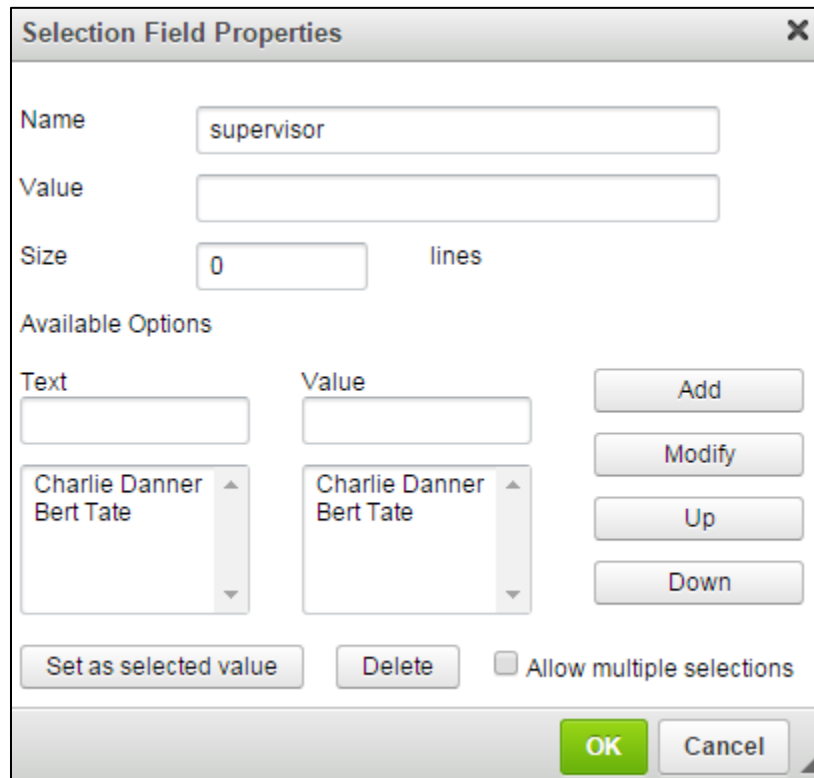
- **Name**: The display name of the input field.

- **Size**: The number of lines to display. To generate a dropdown menu, set **Size** to **0** or **1**. Larger values will instead generate a selection box.

- **Allow multiple selections**: Check this to allow more than one item to be selected. Allow multiple selections will only work for selection field Sizes greater than 1.

- **Text**: The display text for the list items.

- **Value**: The value stored when corresponding text is selected.

- **Add**: Includes **Text** and **Value** item into the list.

- **Modify**: Replaces the selected item in the list with the current **Text** and **Value** fields.

- **Up**: Moves the selected item up the list.

- **Down**: Moves the selected item down the list.

- **Set as selected value**: Sets selected item as the default selection.

- **Delete**: Removes selected item from the list.

It is also possible to access the selection field properties window by right-clicking on the text field, and selecting **Selection Field Properties**.

Enter the **Name** of the selection field and specify the **Size**. Determine if you want to **Allow multiple selections**.

Enter items in the list by providing a display name in the **Text** field, and the corresponding **Value**. The order of the items in the list can be rearranged by using the **Up** and **Down** buttons.

Set the default value to be displayed in the selection field by clicking the **Set as selected value** button with the desired item selected.

Click **OK**.

Hidden Field

With a hidden field, you can include a value with the form that is not visible to the user. This can be useful if you have multiple similar forms that are being processed by the same workflow.

When you click the **Hidden Field** button, the hidden field properties window is displayed.

- **Name**: The display name of the input field as it would appear in submission reports. The Name field is not case-sensitive and should not include any special characters or spaces. Underscores "_" are accepted.

- **Value**: The value to display under the Name header in the submission reports.

It is also possible to access the text field properties window by right-clicking on the text field and selecting **Hidden Field Properties**.

Hidden Field Properties ✕

Name

Season

Value

Summer

OK   Cancel

Click **OK**.

Managing Revisions

The form builder features **version control** on any form templates you create. What this means is that every time you click the **Publish Form Template** button, a new version of the form template is created and added to the form template **Revisions** tab.

In the **Revisions** tab, you will see a list of versions of the form, along with their creator and date of publishing. In order to view a previous revision of the form template, click on the **Revision Name** of the version you would like to access.

| View | Edit | Revisions | Filter Fields | Submissions | Security | Activity |

REVISIONS OF VACATION REQUEST

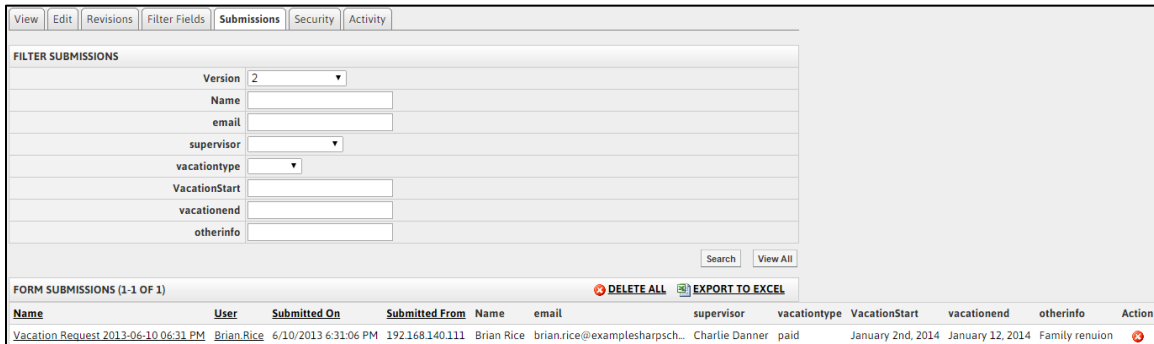| Version	Revision Name	Creation Date	Publish Date	Creator	Action
8	Vacation Request	18 September, 2015 09:02 AM	18 September, 2015 01:02 PM	charlie.danner	Delete Live
7	Vacation Request	18 September, 2015 09:01 AM	18 September, 2015 01:01 PM	charlie.danner	Delete Make Live
6	Vacation Request	13 June, 2013 01:44 PM	13 June, 2013 05:44 PM	bert.tate	Delete Make Live
5	Vacation Request	13 June, 2013 01:42 PM	13 June, 2013 05:42 PM	bert.tate	Delete Make Live
4	Vacation Request	13 June, 2013 12:04 PM	13 June, 2013 04:04 PM	bert.tate	Delete Make Live
3	Vacation Request	13 June, 2013 11:58 AM	13 June, 2013 03:58 PM	bert.tate	Delete Make Live
2	Vacation Request	10 June, 2013 02:05 PM	10 June, 2013 06:05 PM	charlie.danner	Delete Make Live
1	Vacation Request	10 June, 2013 09:23 AM	10 June, 2013 01:23 PM	katrina.west	Delete Make Live

The revision that is being currently used for the template is indicated by the word **Live** appearing in the right-hand **Action** column. To bring another revision into use, click on the **Make Live** link. Revisions can be deleted by clicking the **Delete** link in the Action column.

All the form submissions are attached to the revision version to which they were submitted. If a revision is deleted, all submissions to that version of the form are deleted as well.

Viewing Submissions

Submissions to the form can be viewed directly from the form template interface.

Clicking on the **Submissions** tab will bring up a table containing all the submissions that have been made to the current version of the form. The **Name** column displays the name of the form instance that was submitted to, and **User** shows the identity of the user that submitted the form. If the form is submitted by a visitor that has not logged in to the site, the user column will display **Guest**.

After the **Submitted On** column containing the date of submission, there is a column for each input field in the form, identified by its **Name** attribute. To delete a form submission, click on in the **Action** column at the right side of the table.

To download and save form submissions to your own computer, click **Export to Excel**. This saves the form submissions table as a CSV file, which can be opened by Microsoft Excel and other spreadsheet programs. The **Export to Excel** link appears after there is one or more submission to be able to save.

Delete All will delete all the form submissions associated with the displayed revision.

The **Submissions** tab only displays submissions for one version of a form at a time. If you are missing older submissions, use the Version drop down menu to choose the revision that was previously in place.
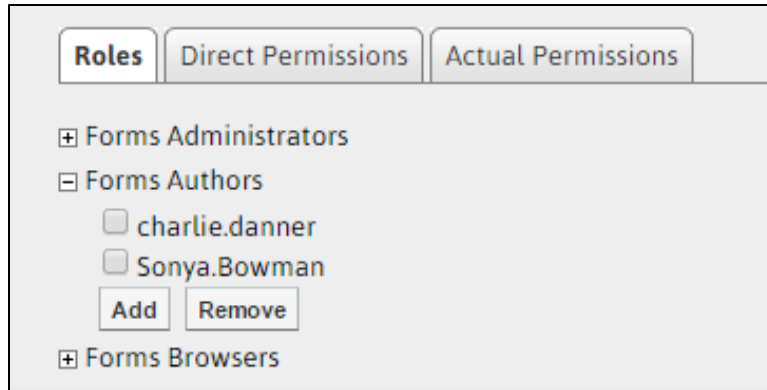
Forms Security

There are two levels of security that can be configured for forms using Presence, first at the Form Library level and secondly for particular form templates.

Form Library Security

Security at the Form Library level (http://www.yoursite.com/form) is controlled through the Form Builder. At the main view of the Form Library, click **Manage Form Templates** to access the Form Builder. Clicking on the **Security** tab, you are presented with three more tabs:

Roles

The **Roles** tab allows users and groups to be added to pre-defined security roles. **Form Template Root Administrators** have full access to access, create, edit, and delete any form categories, form templates, their revisions, and their submissions. Only users in this role can access and use the **Manage Form Categories** interface.

Form Template Root Authors have the ability to edit all the form templates, as well as create new form templates. Users in the **Authors** role are unable to view submissions or configure security to a form template unless they are the creator of that form template. Authors do not see the **Manage Form Categories** link from the Form Library.

Users and groups in the **Form Template Root Browsers** role are able to access the Form Library to be able to fill out forms. Browsers do not see the **Manage Form Templates** and **Manage Form Categories** links from the Form Library.

To assign a user or group to a role, click the ⊞ symbol next the role name to expand the list of users in that role.

Click **Add** to open the user picker window. From this window select the users or groups you'd like to grant permissions to by clicking their name and clicking **Add**. When you have selected your users, click **OK**.

Direct Permissions

Within **Direct Permissions** you can assign specific forms security permissions to other users and groups.

First, click **Add** to select the users to grant permissions to. A window will pop up.
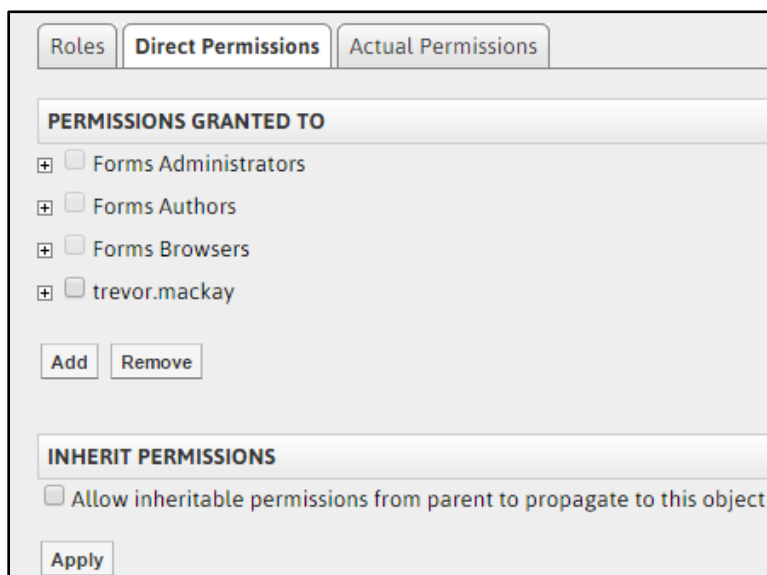
From this window select the users or groups you'd like to grant permissions to by clicking their name and clicking **Add**. When you have selected your users, click **OK**.

To individually assign permissions to each user, click on the ⊞ beside their name. From here you can assign specific permissions:

PERMISSION	WHAT IT ALLOWS YOU TO DO
Create	Can add Form Templates.
Delete	Can delete Form Templates.
Read	Can view the Form Library.
Write	Can make changes to Form Templates.
Full Control	All of the above, as well as the ability to manage Form Categories, assign permissions to others, and view submissions on forms they did not create.

Actual Permissions

Actual Permissions allows you to view what permissions specific users have on your Form Library. Users higher up the security hierarchy may already have permissions to your Form Library. Users with entire site permissions (or higher tiers of security hierarchy) may have permissions to your Form Library if you have the **Allow Inheritable Permissions From Parent to Propagate to This Object** checkbox selected on the **Direct Permissions** screen.

Form Template Security

The ability to manage security settings for a particular form template allows Administrators to assign some users the ability to access and maintain a particular form without necessarily giving them the access to control all the forms on the site.

To configure security for a specific form template, it is the same process to add specific users and groups to the **Direct Permissions** as in the Form Library.

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Managing Form Instances

Creating a Form Page

Creating a form page on your site is a similar process to adding any other type of page. Hover over **Page** in the Administrative Toolbar and click **Form Page**.
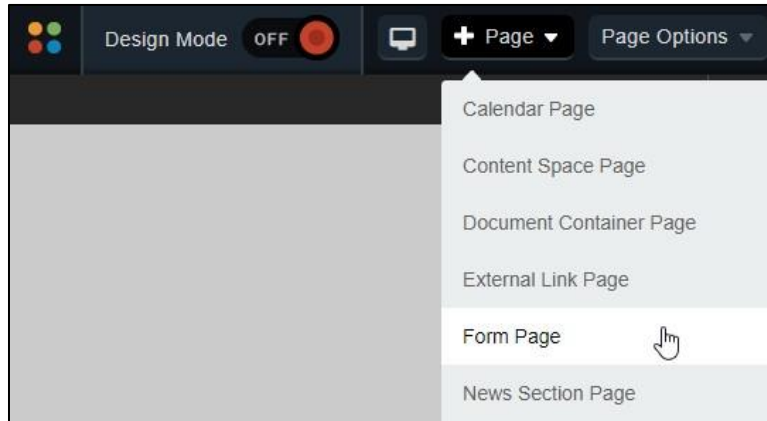

Fill in the **Page Name** field for your new page.

The **Page URL** field will automatically be filled in. The **Page URL** is used to build the Friendly URL used to access the page. If you wish to make modifications to the **Page URL**, click 🔒 and then you can change the text. Keep in mind that only alphanumeric characters, underscores and dashes can be used. Any other characters will be automatically removed.
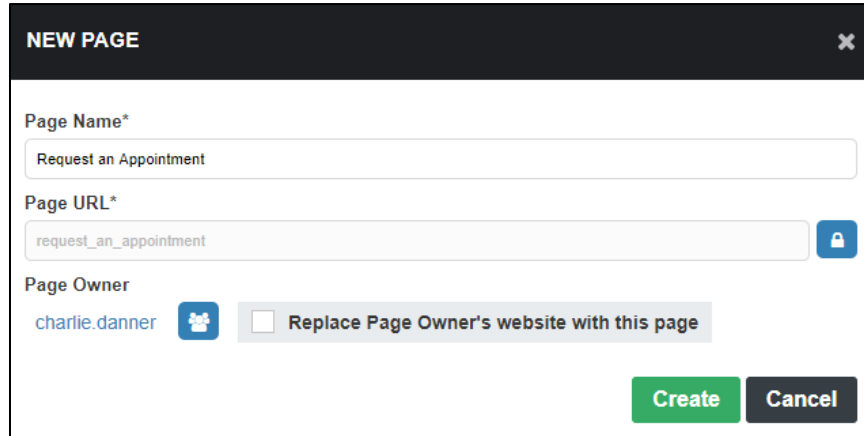
By default, you will be assigned as the **Page Owner**. If you wish to set someone else as the owner, click the 👥 icon.

When the User Picker opens, choose the user you wish to make the owner, and click **Add** then click **OK**.
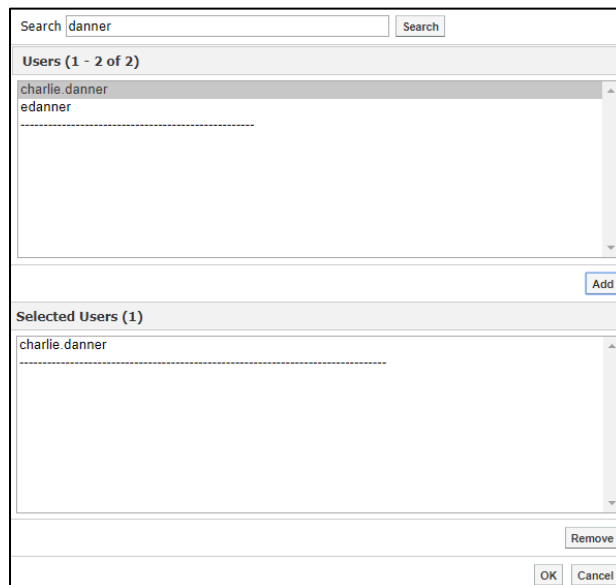
If you want to set the page as the user's homepage in their user profile, click **Replace Page Owner's website with this page**.

💡 *Note: On some sites, you may also have a **Category** drop-down that you can use to select a category for the page.*

To finish creating the Form Page, click **Create**.

On the page you've created toggle on **Design Mode**. Click the ✎ icon for the **Custom Form** portlet. This will bring you to the **Form Details** page, where this form instance is configured.
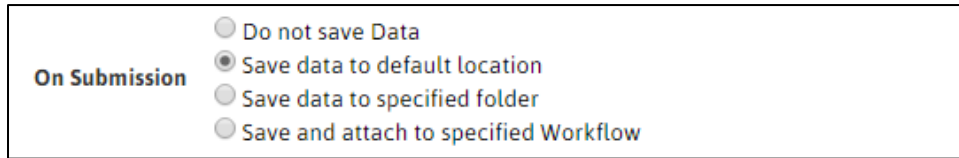
The **Form Template** field is the only mandatory field. Click the **Browse** link to the right of the field. The **Browse** window pops up. Choose the desired template by clicking the **Select** link.

The **On Submission** option allows you to control how the form submissions are saved. **Save data to default location** will save the form submissions in the Form Builder along with the template.
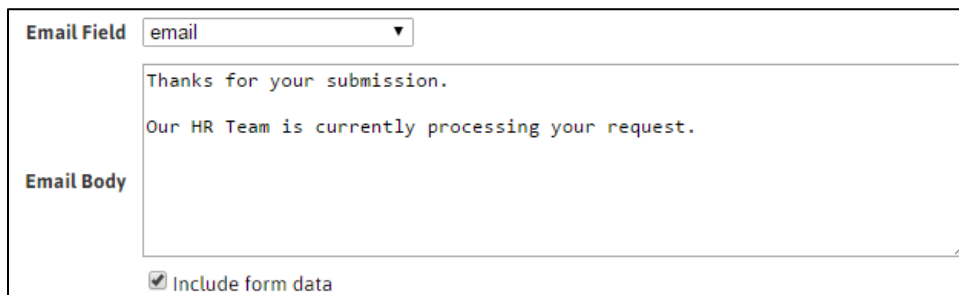

Save data to specified folder will save each Form Submission as an entry in a folder in the Workspaces or eLearning Server. **Save and attach to specified Workflow** connects the form submission to a workflow which can be used to trigger a series of tasks.

You can use the **Auto-Email** field to send an automated email response to the user after they fill out the form. Select the **Email Field** where the user enters their email address, fill out the **Email Body** and, if you wish, specify that the user will also be sent a copy of their submission (via the **Include form data** option).
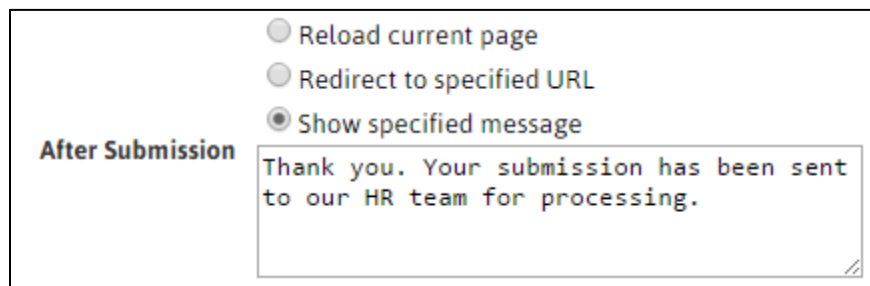

If you want guest users to have to fill out a CAPTCHA, check **Enable security measure on Guest users**. This can help prevent spam-bots from sending in automated submissions to your form.

After Submission allows the author of the form template to specify what a user sees after the form has been submitted. By default, the form will reload the page that the form was accessed from.
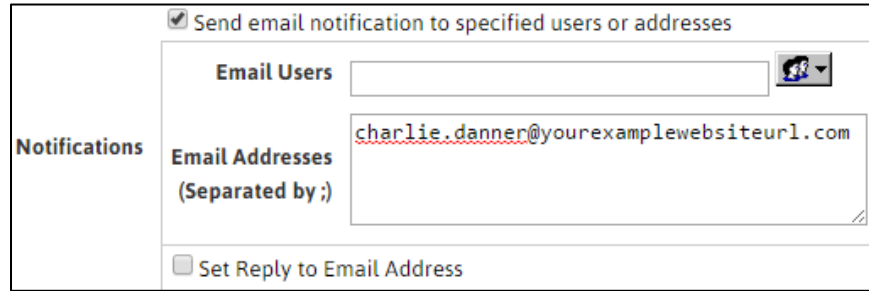

The user can be redirected to a specific URL once the form has been filled out. **Show Specified Message** will display a custom message after the form is submitted before returning the user to the default location.

You can select **Send email notification to specified users or addresses** to send an email with the form contents each time the form is submitted. To add users already on the site, click on the icon to open the user picker. When the pop-up window appears, select the groups and site users to be emailed on form submission and click

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Add. Once all the users to be contacted have been added to the list at the bottom half of the user picker, select **OK**.

To add e-mail addresses not associated with user accounts on the site, enter them into the Email Addresses field. If there are multiple addresses, they should be separated by a semi-colon (**;**). In email notifications, the **Title** field appears as the subject line of the notification message.

To complete the configuration process of your Form Page, click the **Update Form** button.

Creating Forms on Existing Pages

To add form instances on an existing page, we would use Form portlets.

To add a form portlet to a page, toggle on **Design Mode**. Click the **Forms** category and then drag and drop the **Custom Form** portlet on to the area of the page where the form is to be added.

Hover over the new **Custom Form** portlet and click the ✎ button to configure the portlet.

Configure the portlet as described in the previous section.

Editing Form Instances

Hover over the new **Custom Form** portlet and click the ✎ button to configure the portlet.

Configure the portlet as described in the *Creating a Form Page* section.