Form Center

With the Form Center you can:

- Create forms that allow users to complete them online and submit them, print, or submit and print the form.
- Receive an email when a form is submitted.
- Keep a database of all submitted responses within the system and export that data to other applications.

Section 1: Creating a Form Center Category

Note: Only System Administrators and Owners (of the module) can add a Forms Category

Access Form Center

1. Login to the admin side of the website
2. Go to **Modules > Form Center**
3. Click the **Add Category** button in the Categories Box on the right side of the module. (Fig. 1-1)

Fig. 1-1

4. In the textbox labeled **Name** type in the name of the category you wish to create.
5. The **Force Login** field is optional and will require front-end users to log in if selected.
6. The **Permissions** section is used to give individual groups different levels of access to the category you are creating. Each available group will be listed below the **Permissions** heading, with three checkboxes available (Fig. 1-2).
    a. **View** – If the category is intended to be public, you do not need to worry about having this option checked for each group. If the category is intended to be private, **View** allows the users to see the category when logged in.
    b. **Author** – Giving a group **Author** access allows the users in that group to create forms in this category, but they must **Submit** them to a **Publisher** to make them available for public access.
    c. **Publish** – Giving a group **Publish** access allows the users to create and publish forms in this category.
7. A confirmation page may be created by clicking on the **Confirmation Page** link.
    - The confirmation page will be the default page that a user will be directed to after hitting submit.
    - The confirmation page is default for all forms in your category. It can be changed when creating specific forms. The instructions for the confirmation page can be found in Section 4.

8. Once the information above has been entered, click the **Save** button
9. The category you have just created will appear as a **Draft**. In order to make it available for public view, click on the **Publish** link.

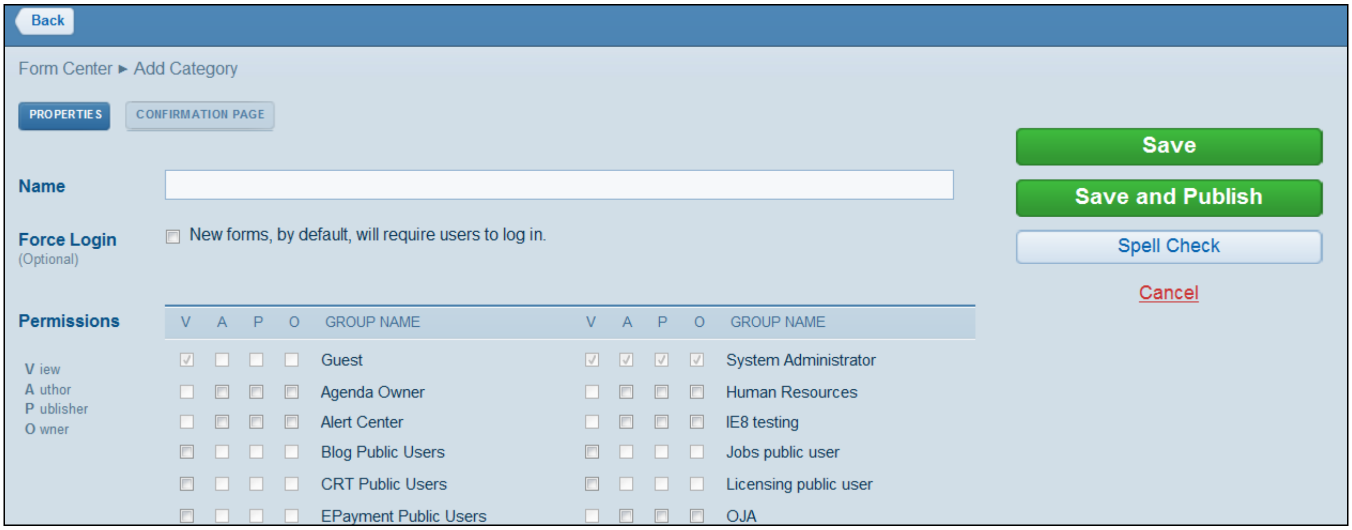

Fig. 1-2

Section 2: Modifying a Category

Note: Only System Administrators and Owners (of the module) can Modify a Category

Access Form Center

1. Login to the admin side of the website
2. Go to **Modules > Form Center**
3. Select the category you wish to modify in the **Categories** box on the right side of the module.
4. The category you selected will now move to the top of the module. Use the **Actions** drop-down menu to the right of the category name and choose **Modify**. (Fig. 2-1)

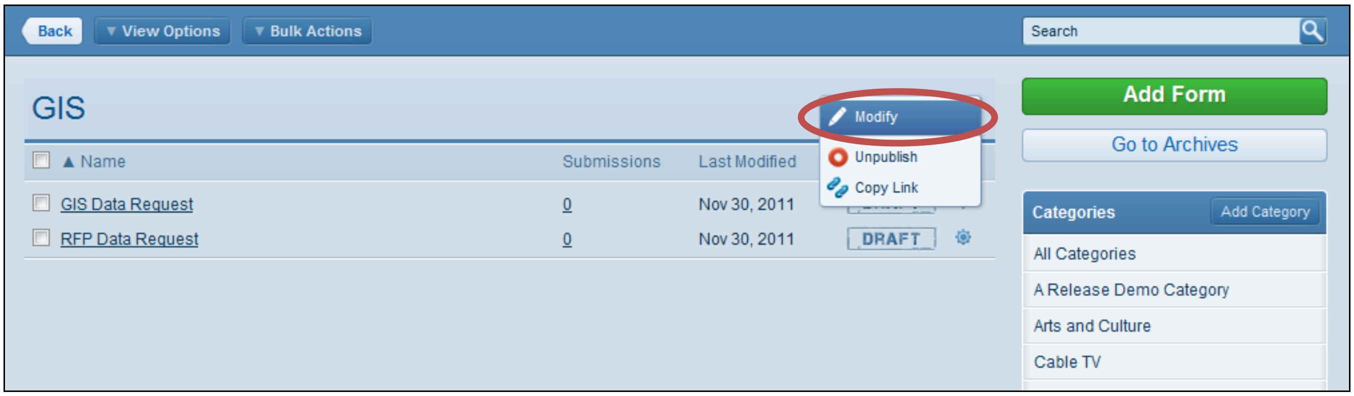

Fig. 2-1

5. If you wish to rename the category, type the new name in the textbox labeled **Name**.
6. If you wish to change the **Permissions** for this category, check the appropriate boxes. (Fig. 1-2)
7. Once the information above has been entered, click the green **Save** button.
8. If the category was previously published, there is no need to republish it. If the category was NOT previously published, you will need to click the **Publish** link under the **Choose an Action** heading in order to make it available for public view.
9. If a category was NOT previously published, **Authors** may modify it by following the same procedures as an **Administrator** or **Publisher**. When the category is ready for publishing an **Author** must **Save and Submit** rather than publish, and may NOT modify it after it has been published.

Section 3: Deleting a Category

Note: Only System Administrators and Owners (of the module) can delete a Category

Access Forms

1. Login to the admin side of the website
2. **Go to Modules > Form Center**
3. Find the category you wish to delete in the list.
4. You must have the category **Unpublished** before you can delete it.
5. After your category is **Unpublished**, select **Delete** from the drop-down menu under **Action**. (Fig. 3-1)

Fig. 3-1

NOTE: You may not delete a category that still contains items. You will need to unpublish and delete the forms within the category first before deleting the category.

6. A pop-up will appear, asking if you are sure you wish to delete the category.
   a. If you have selected the incorrect category to delete, click **Cancel**.
   b. After making sure the category you are deleting is the correct one, click **OK**.

Section 4: Editing the Confirmation Page

NOTE: The confirmation page will be available to use when creating any form in that category, however, you may choose to redirect to any address you like.

Access Forms

1. Login to the admin side of the website
2. Go to **Modules > Form Center**
3. Find the category you wish to edit.
4. From the **Actions** drop-down menu select **Modify.**
5. Click on the **Confirmation Page** button.
6. Edit the **Confirmation Page**.
    a. Click **Show Advanced Tools** for more editing options (Fig 4.1)
    b. Use the Spell Check tool within the editing window. (Fig. 4.1)
7. Click the green **Save** button on the right side of the screen.

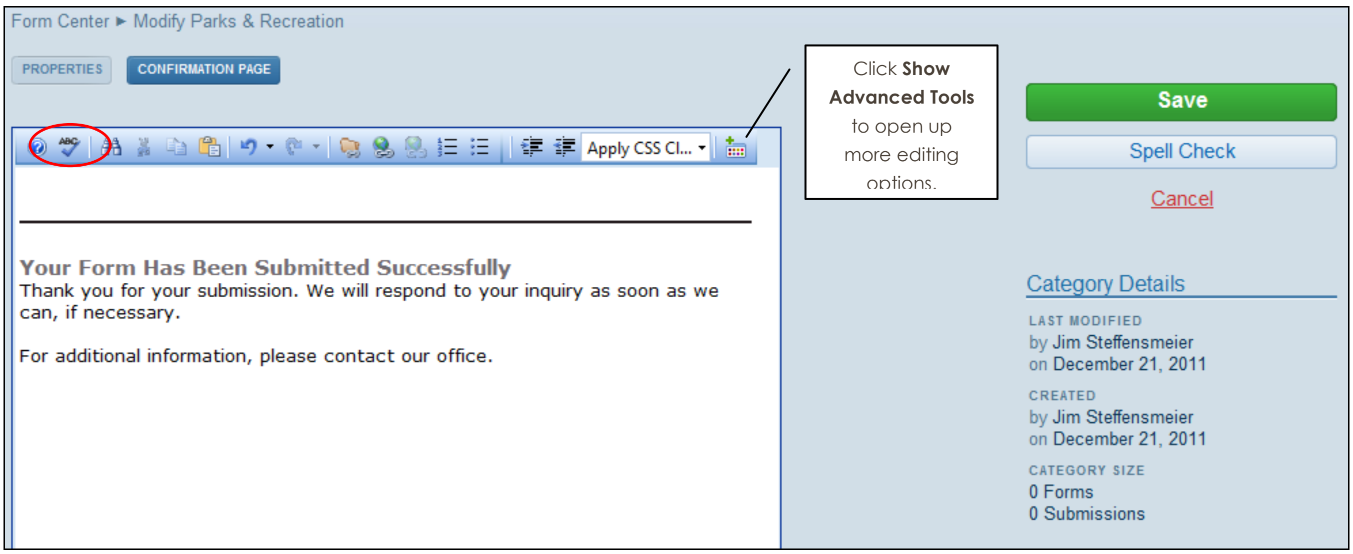

Fig. 4.1

Section 5: Creating a Form

NOTE: You must have an existing category in order to create a new form. If you do not have an existing category, please refer to the Creating a Category section for instructions.

Access Forms

1. Login to the admin side of the website
2. Go to **Modules > Form Center**
3. Select the category you wish to create a form under.
4. Click on the green **Add Form** button on the right side of the screen.
5. **Name** -- Enter a name for your form. This is what will be displayed at the top of the form on the Public side.
6. **Description** – This is the brief description that will show up with the form name on the Public side.
7. **Submit Option** – Chose what options will be available once a user has completed filling out the form. Regardless of the options set here, the user will always have the option to receive an email copy of the form.
    a. **Submit** – The user will be able to submit the form but will not be given the option to print.
    b. **Print** – The form will not be able to be submitted online. The user will have to print it.
    c. **Submit and Print** – The user will be able to both submit and print the form.
8. **Confirmation Page** – You can also choose which page site users go to when they click submit. The confirmation page should thank them for their information, feedback, etc, let them know if they will be contacted and what will be done with their information (Fig 5-1).
    a. The default selection will use the category's confirmation page.
    b. Select the second option and enter the address of a different page if applicable. (You must use the full web address if directing to an outside source.)

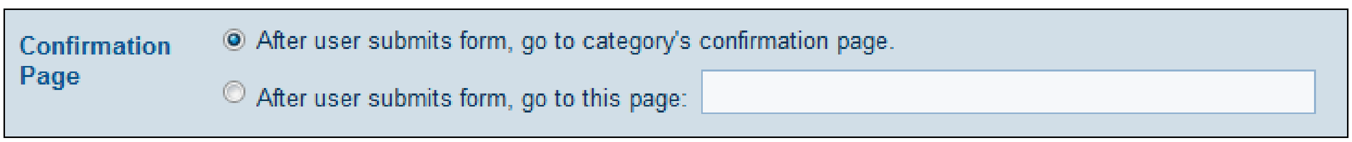

Fig. 5-1

9. **Submit to** -- Type in the email address(es) you would like the data to go to. Separate multiple email addresses with a semicolon. If you do not specify an email address, the form will go to a default address specified somewhere else in the system.
10. **Force Login** – Check this box if you want to require users to log in before they can submit the form (Fig. 5-2).

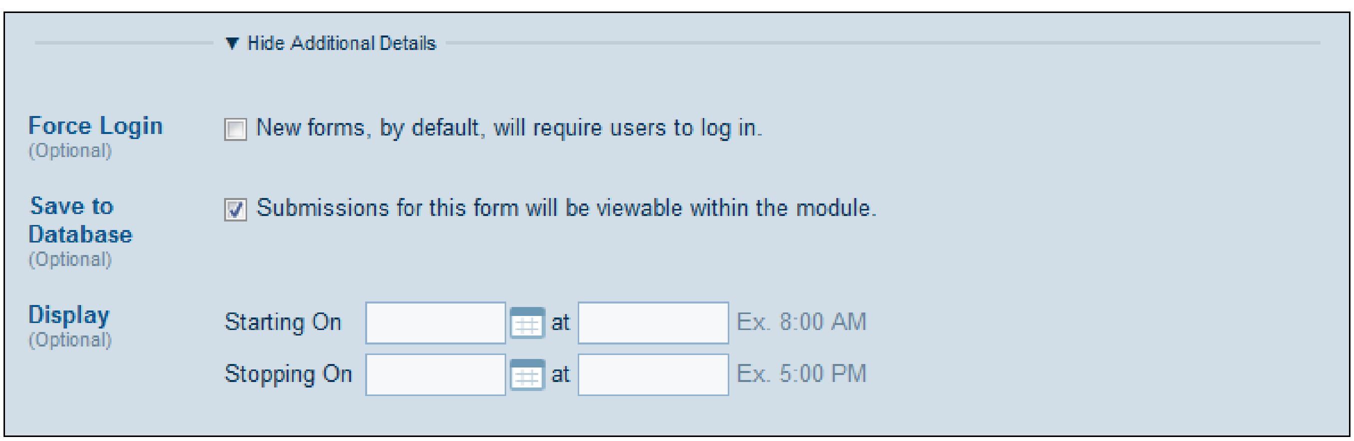

Fig. 5-2

11. **Save to Database** – This option will be selected by default. If selected, all submissions for this form will be viewable within the module.
12. **Display** -- The **Starting On** and **Stopping On** textboxes are generally left blank.
    a. If left blank, the form will become available for public use as soon as you publish it and will be available indefinitely.
    b. If a **Starting On Date** is entered, the form will become available on that date.
    c. If a **Stopping On Date** is entered, the form will become inaccessible on that date.
    d. If the time fields are left blank they will default to 12:00 am on the start date, and 11:59 pm on the end date.
13. You may now click the **Save** button on the upper right side of the screen before building your form, or you may proceed to the **Adding Fields to a Form** section (Fig. 5-3).

Fig. 5-3

Section 6: Adding Fields to a Form

1. Fields are added to your form by dragging them to the desired spot.
2. You can either drag a **Field Type** or a **Field Set** to the form.
    a. **Field Types** create individual fields on your form.
    b. **Field Sets** are predetermined sets of fields. (Creating Field Sets can be found in Section 6)
3. There are 13 different **Field Types** that can be used in a variety of ways in order to create your custom form.
    a. **Short Answer** – The Short Answer field type allows the user to type in a short answer such as a name, address, telephone number, etc.

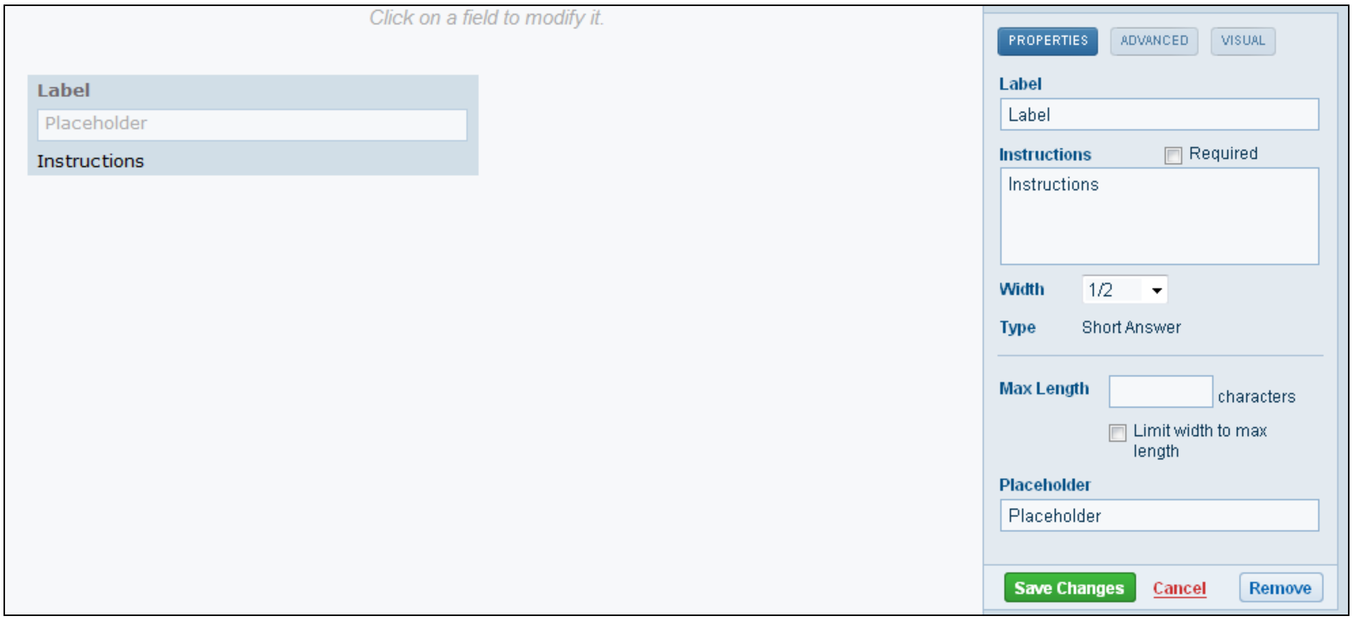

Fig. 6-1
Short Answer Field

i. **Properties Tab**
1. **Label** – Enter the field Label here (First Name, Zip Code, Address, etc.)
2. **Instructions** – Use this space to provide specific instructions for the user. The instructions will show up under the field. (Fig 5-1)
3. **Width** – Determines how much of the page width the field will use.
4. **Required** – If the field is set to Required, it must be filled out by the user before the form can be submitted.
5. **Max Length** – Limits the number of characters that can be entered
    a. Enter the maximum number of characters for the field.
    b. Select the box to limit the field width to the character length.
6. **Placeholder** – Enter a value here to appear in the field before they start typing.

ii. **Advanced Tab**
1. **Internal Use Only** – The field will not be available on the front end when the user is filling out the form but will be available for internal uses after the form is submitted.
2. **Default Answer** – Choose from one of the available default answers. Select **Other** to enter a custom default answer.
3. **Validation**
    a. **Answer Must Be of Type** – Select a value from the drop down list.

b. **Conditions** – This option is only available after saving the field. Once the field has been saved you may click **New Condition** and make your field a conditional field. For more on conditional fields see Section 10.

iii. **Visual Tab**
1. Choose Field, Input, Label, or Instructions.
2. Apply the color.
3. Your choice can be set as the default for the form or can be applied to the entire form.

b. **Long Answer** – The Long Answer field type allows the user to type in more descriptive answers, such as giving the details of a complaint, ect.
i. The long answer is similar to the short answer field type, however you may set the number of rows along with the character limit.

c. **Checkbox(es)** – Checkboxes allow the user to select from many different options for their answer. (Fig 6-2)
i. **Properties Tab**
1. **Label** – Enter the field Label
2. **Instructions** – Use this space to provide specific instructions for the user. The instructions will show up under the field unless **Above Options** is selected.
3. **Width** – Determines how much of the page width the field will use.
4. **Required** – If the field is set to Required, it must be filled out by the user before the form can be submitted.
5. **Options** – To add options, type the first option and hit enter, or click the small plus sign.
a. Select **Submit selections to email(s)** in order to have the form sent to separate addresses determined by the answer selected.
b. To delete an unwanted option, click the small **x** in the corner of the option.

ii. **Advanced Tab**
1. **Internal Use Only** – The field will not be available on the front end when the user is filling out the form but will be available for internal uses after the form is submitted.
2. **Default Answer** – This option is only available after saving the field. Choose which options you want to be checked by default.
3. **Validation**
a. **Conditions** – This option is only available after saving the field.
b. Once the field has been saved you may click **New Condition** and make your field a conditional field. For more on conditional fields see section 10.

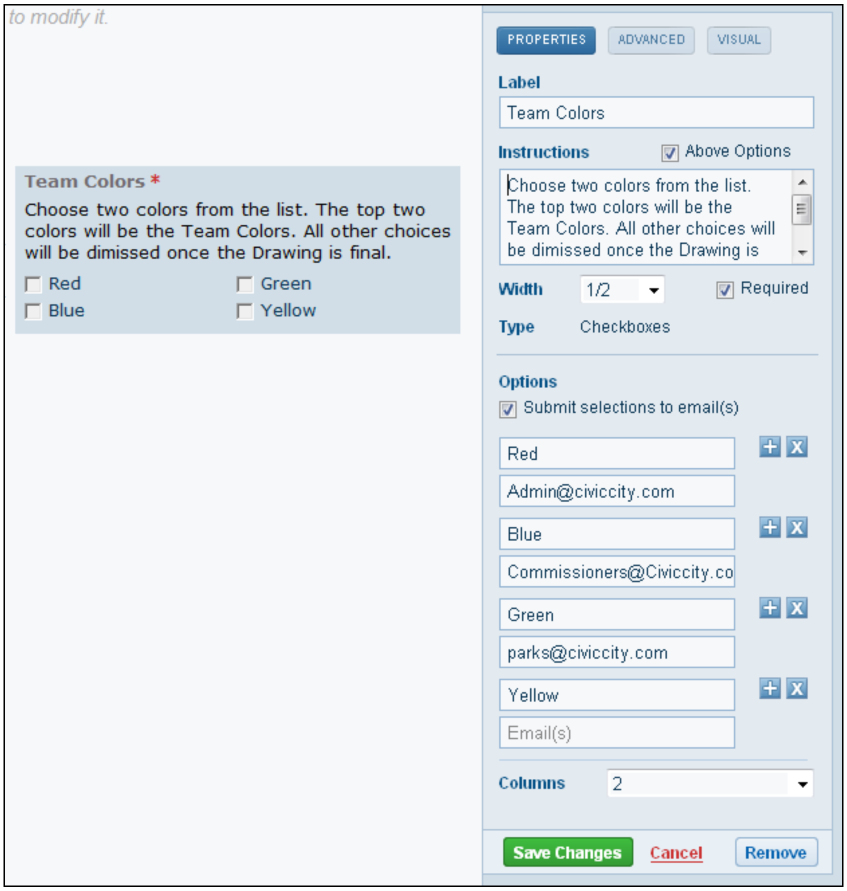

Fig. 6-2

Checkbox Field

d. **Radio Buttons** – Radio buttons allow the user to select from different options. They work very similar to Checkboxes, but the user can only select one answer for the question.
e. **Dropdown List** – The Dropdown List field type allows the user to select from different answers from a drop down list. The dropdown lists functions exactly like the radio buttons except your choices come from a dropdown list instead of buttons.
f. **File Upload** - The file upload allows the user to upload a file to submit along with their form, such as a picture, resume, etc.
g. **Reply Email** – Allows the user to give you an email address so you can reply to their submitted form.
h. **Link** – Allows you to place a link on the form for the user to follow.
i. **Image** – Used to upload an image from your computer to display on the form
j. **Section Break** – Adds a line to the form that will divide up the form into sections. You can choose from four types of lines including solid, dotted, dashed, or transparent.
k. **Page Break** – Divides up the form into multiple pages. Each page can be named, or by default it will display step 1, step 2, etc. Submit will always be on the last page. (The Page Break Field will not cause the Form to print on multiple pages. It has no effect on printing, only the way the form appears online.) (Fig. 6-3)

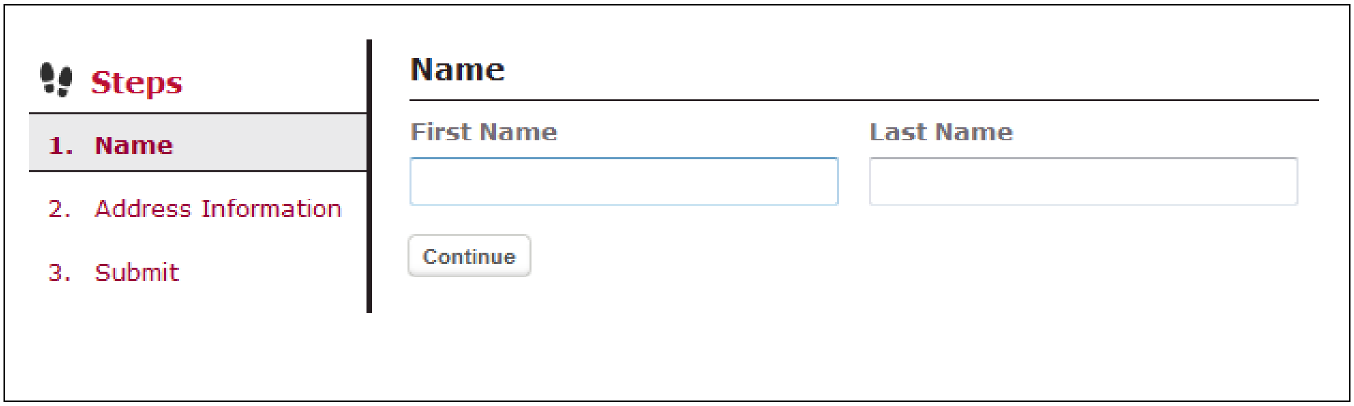

Fig. 6-3

l. **Text** – This field allows you to put text on your form. It's useful for instructions, terms, and any other info that doesn't require an answer.
m. **Password** – Allows you to create a field similar to a short answer field that hides the characters being entered into it.
    i. Can be used as a conditional field in order to restrict access to the form or redirect to something else.
    ii. Password fields should not be used for confidential information such as Social Security or credit card numbers.

Section 7: Field Sets

Note: Adding Fields to the Field Sets requires the same process laid out in Section 6.

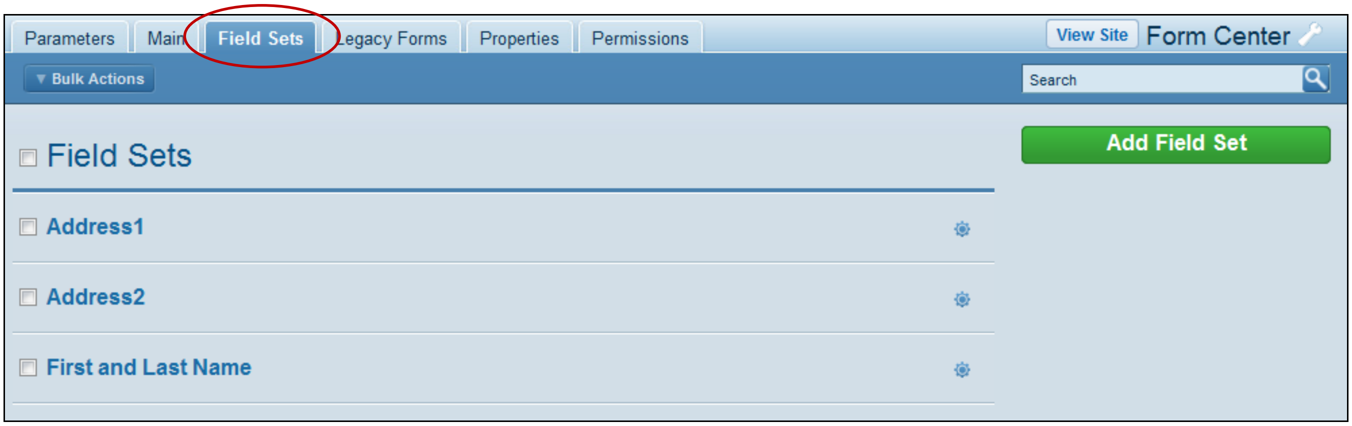

Fig. 7-1

Access the Forms Module

1. Login to the admin side of the website
2. Go to **Modules > Form Center**
3. Select the **Field Sets** tab. (Fig. 6-1)
4. Click **Add Field Set** to create a new tab or choose an existing field to edit by using the **Action** dropdown and choosing **Modify**
5. **Name** – Name the field set
6. **Add Fields** as described in Section 5.
7. **Save** or **Save and Make Active** – If you choose **Save and Make Active** the field set will be available for immediate use.

Section 8: Viewing Form Statistics

Note: In order to view statistics for forms, you must leave the default value at Yes on the Database Form option when creating or modifying your form.

Access the Forms Module

8. Login to the admin side of the website
9. Go to **Modules > Form Center**
10. Select the category.
11. Select the form you wish to view the statistics for.
12. Go to the **Action** drop-down and choose **View Submissions**. (Fig. 8-1)

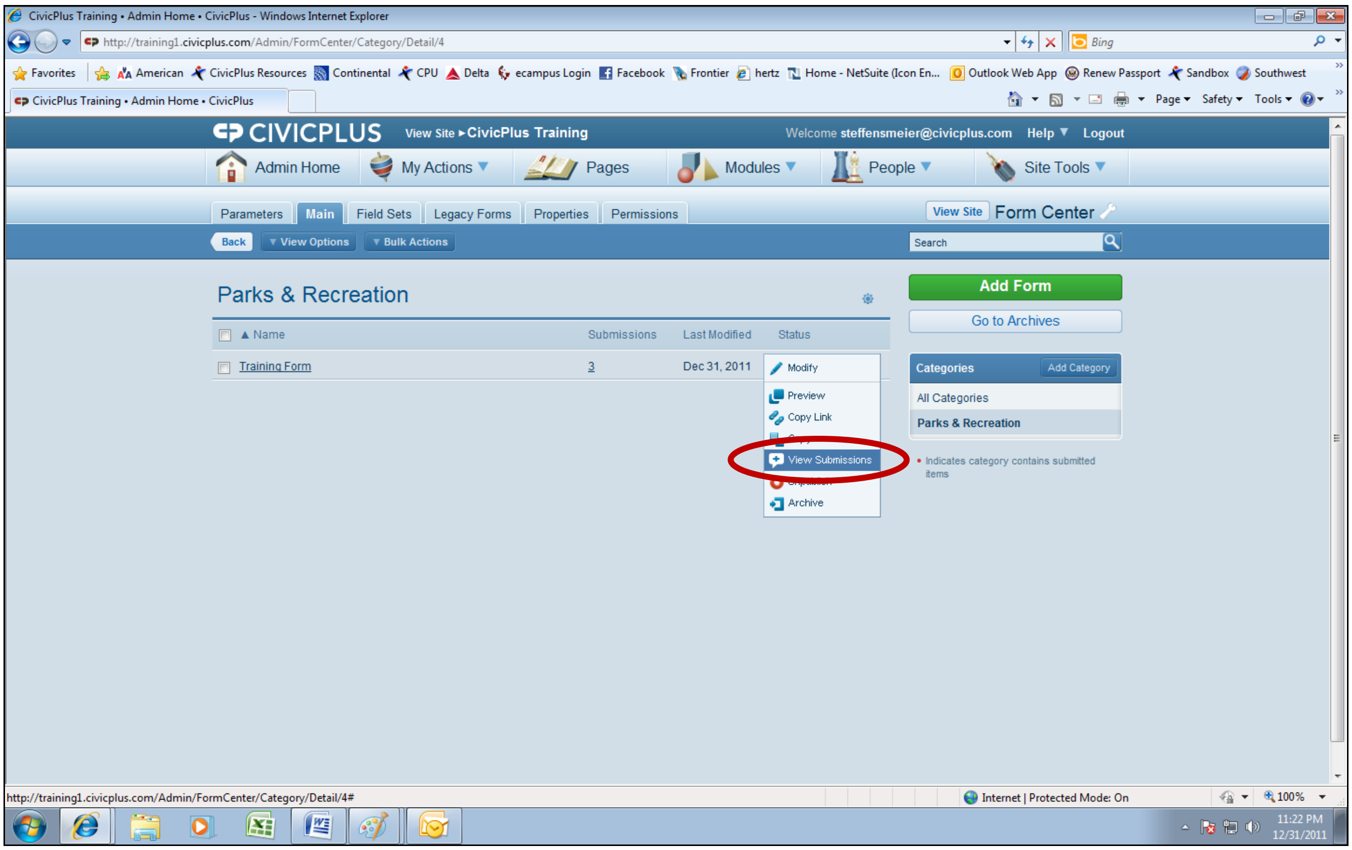

Fig. 8-1

Section 9: Exporting Results

Access the Forms Module

1. Login to the admin side of your website
2. Go to **Modules > Form Center**
3. Go into the **Submitted Data** for the form
4. Click on the **Export All** button
5. A pop-up window will ask you to open or save your file.
    a. Click Open to view your results separated by commas in a text file
    b. Click Save to save the results to your computer as a comma-delimited text (.txt) file

Section 9.1: View Your Form Results in Microsoft Excel

View Your File Microsoft Excel

1. Save the file to your computer as a comma-delimited (.txt) file
2. Open Excel, click on the File menu and choose **Open**
3. Change the Files of Type field to Text Files (.txt). Find your file and click the Open button
4. The import wizard should start. Select Delimited file type and click Next (Fig. 9.1-1)

Fig. 9.1-1

5. Under delimiters, check the box next to **Comma** (and uncheck any others), and click Next
6. Click Finish. Your results should now be separated into columns
7. Go the File menu and click **Save As**. Change the file type back to Microsoft Excel Workbook, and click **Save**

Section 10: Creating Conditional Fields

Creating Conditions for your Form Fields

1. The Fields must be created and saved before conditions can be set up.
    a. In the example provided, a conditional field is set up where the required additional information does not show up unless the answer to the previous question is yes. (Fig. 10-1)

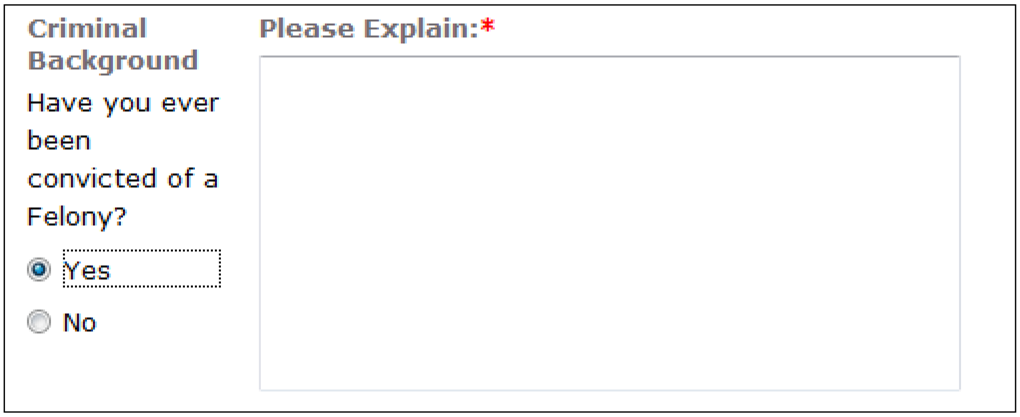

Fig. 10-1

    b. Choose **New Condition** in the **Advanced Tab** on the field you wish to make conditional.
        i. **Step 1**- Choose the Condition you want to apply. (Fig. 10-2)
            1. Choose Show, Hide, Require, or Redirect to
            2. Hit **Next**

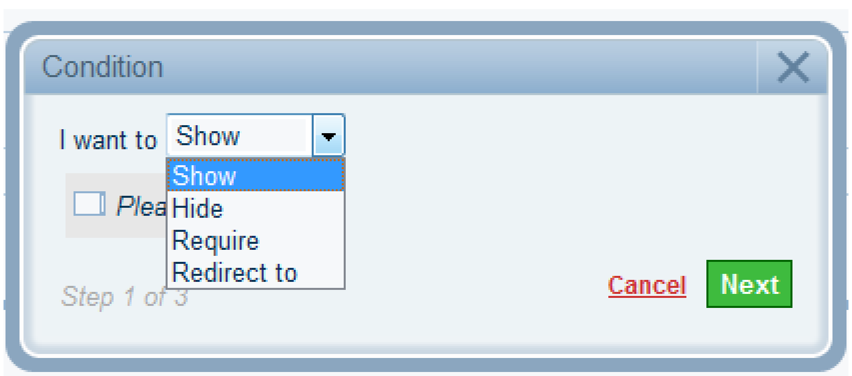

Fig. 10-2

ii. **Step 2** - Choose what answer will trigger the condition. (Fig. 10-3)
   1. Select the Field
   2. Choose from the Dropdown
   3. If applicable, enter the value in the box to the right.
   4. Hit **Next**

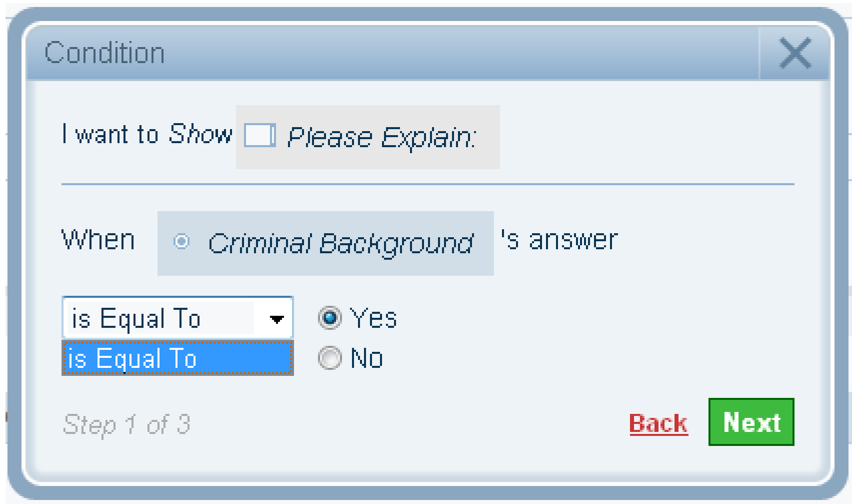

Fig. 10-3

iii. **Step 3** – Confirmation (Fig. 10-4)
   1. Review your condition.
   2. If you need to make a change, click **Back**
   3. If you are satisfied, Click **Done**

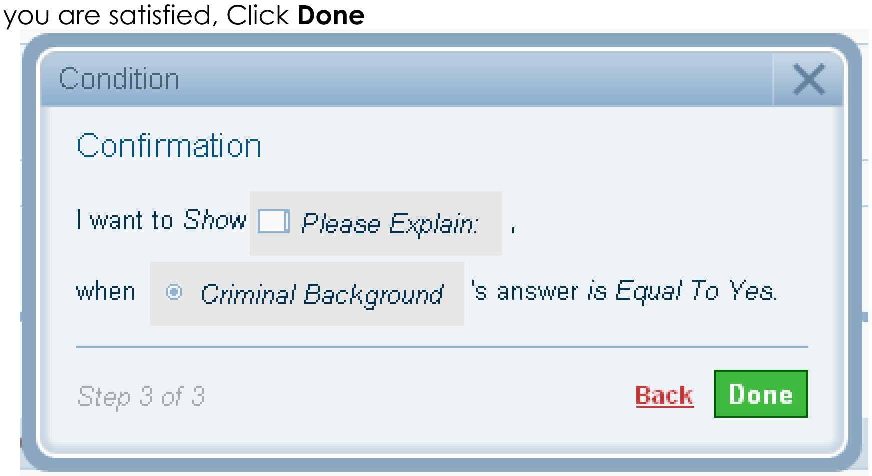

Fig. 10-4

c. View all Conditions on the form
    i. Click the **Conditions** tab at the top of your form. (Fig. 10-5)
    ii. Use the **Action** dropdown to make the condition Active or Inactive.

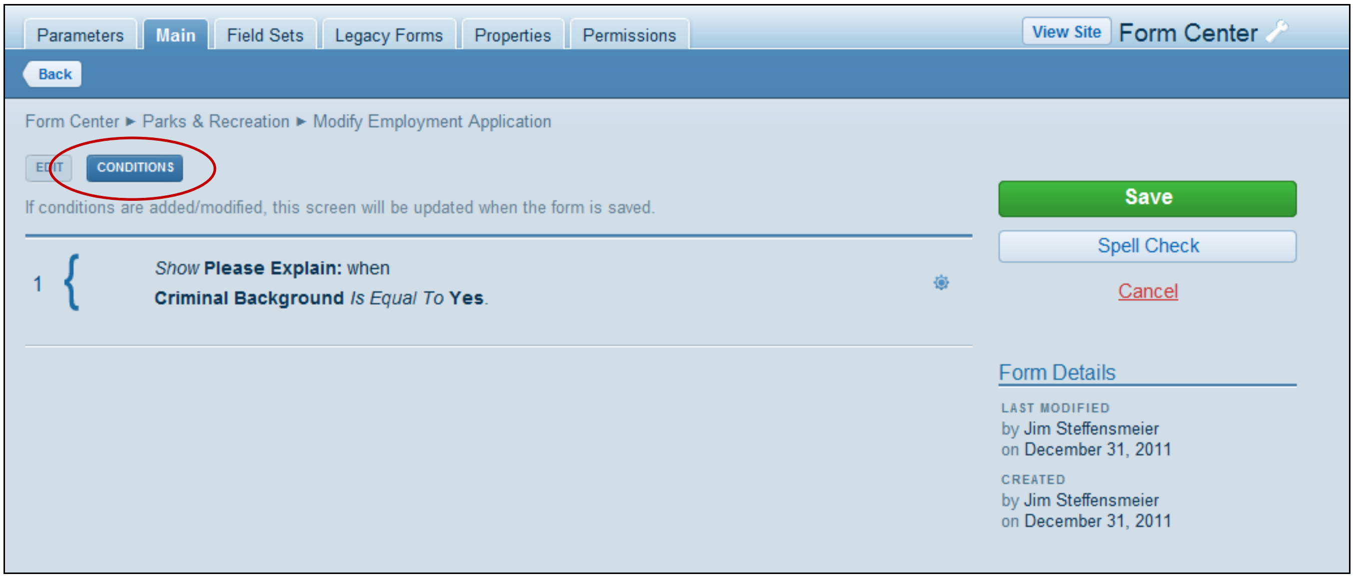

Fig. 10-5