IT Training

University of Reading

Web CMS Forms

Contents

Forms 1
- Creating a plan 1
- Data types 2
- Data protection 2

Form Manager 2
- Creating a form 2
- Adding questions 4
- Adding Answers for Radio Button and Drop Lists 5

Amending Forms 6
- Amending questions and answers 6
- To change the order of questions 7

To Add a Form to a Page 7

About Confirmation Pages 9

Viewing Responses 9
- Email Responses 9
- CMS Responses in Response Manager 10

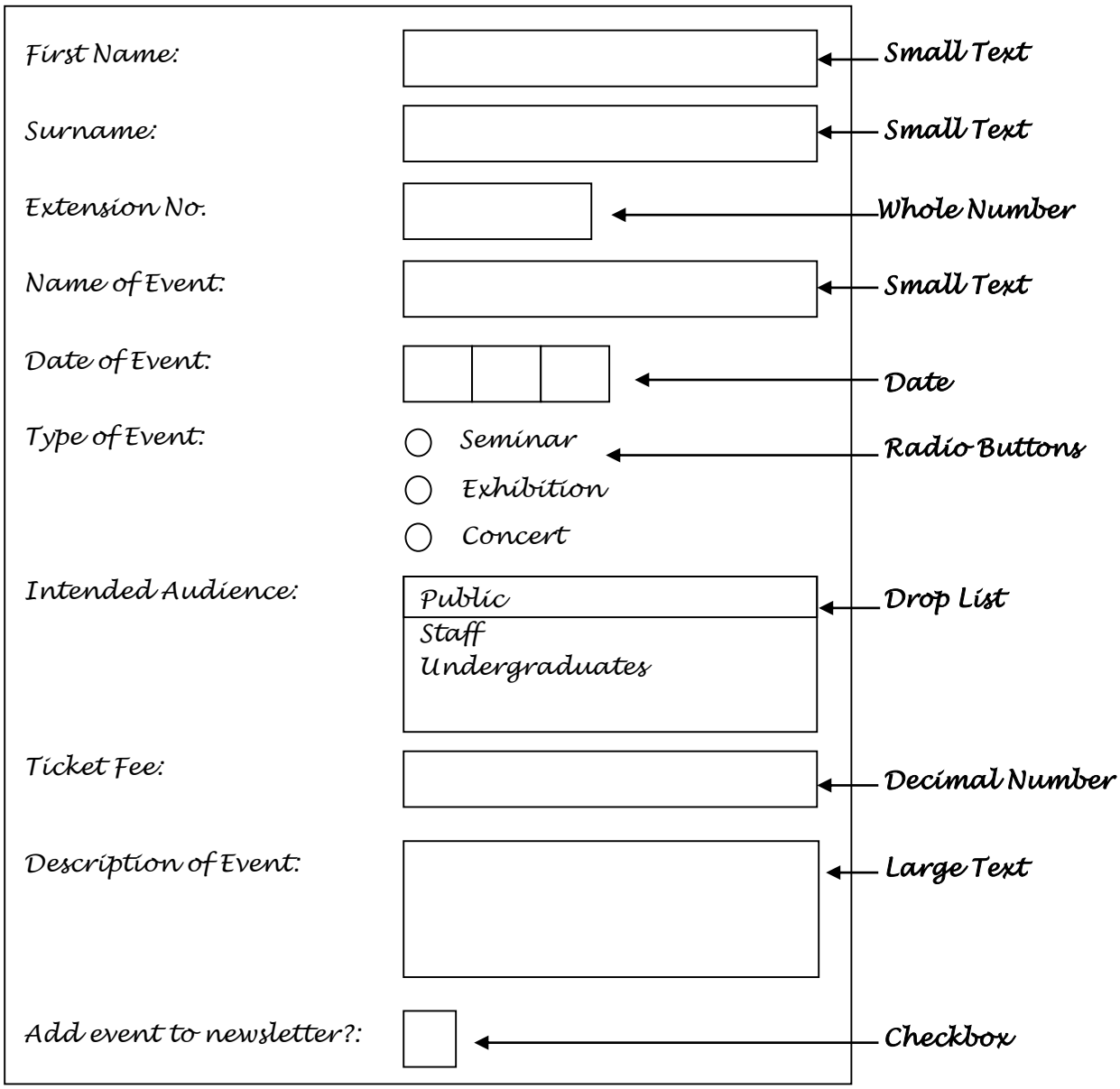
Deleting Responses from the Response Manager 11

Forms

Creating a plan

Forms can be created within the CMS, which allows data that is filled in by visitors to your website to either be e-mailed and/or stored within the CMS for review later.

Before you begin creating your form within the CMS, you should first draft out how you would like the form to look on paper and what data types each question and answer will be. You should also have a **confirmation** or **thank you page** setup in the CMS that users are redirected to once they have submitted the online form. Note that this confirmation page needs to be submitted and **published**.



Data types

There are 10 or more different possible types of questions:

Data Type	Use
Small Text	For short, text only answers e.g. Name
Large Text	For longer, text only answers e.g. Descriptions
Decimal Number	For any numbers with decimal places e.g. Money
Whole Number	For any numbers without decimal places e.g. telephone numbers
Date	For any dates
Radio Button	For when there are only a few options for the user to choose from
Drop List	For when there are many options for the user to choose from
Checkbox	For when a yes/no answer is required
Spacer	For adding text where no answer is required. e.g. to add in data protection text

A couple of other data types that aren't mentioned above are for **File Upload**, if you need the person filling in the form to upload a particular file, and for **Hidden**.

Data protection

Any form which asks people to supply personal information must contain a 'collection text', which tells people what is being collected, why, the limits on 'processing' (use, disclosure and disposal) and should contain further information, like a data protection statement. An easy to read, 'step by step' guide is available to help you design these collection texts for the forms you are designing: http://www.reading.ac.uk/web/FILES/imps/imps-GuidelinesforCollectingPersonalData20110228.pdf

If you require further information or would like more guidance, contact a member of Information Management and Policy Services (IMPS) at imps@reading.ac.uk

Data protection messages should be added before the submit button of your form, using the **Spacer** question type, so that this is visible before a user submits the form.

Form Manager

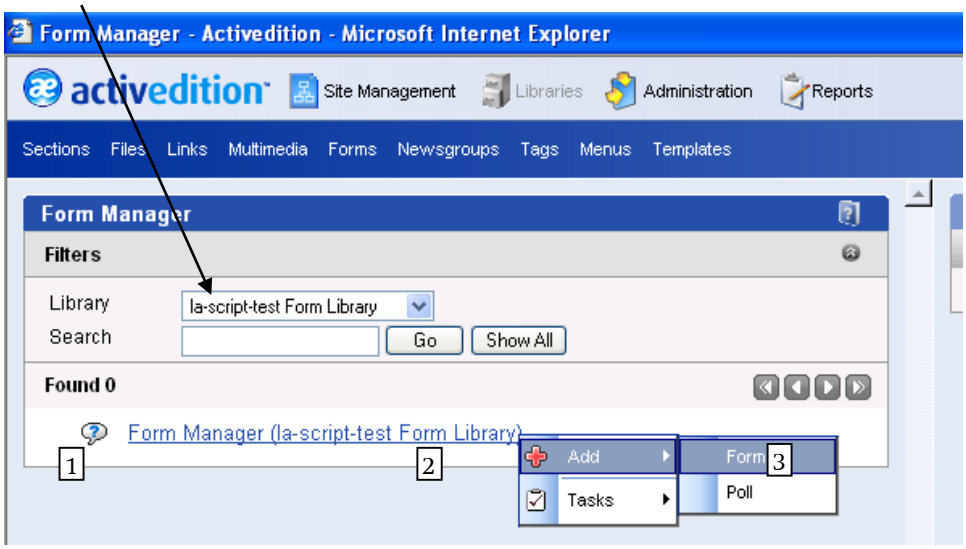
To open the **Form Manager**, click on the **Libraries** icon

in the top toolbar and then click on the **Forms** link

in the toolbar below.

Creating a form

In the **Library** drop down box, select your Library (**training** on the course). You will then be able to see any existing forms within your Library.

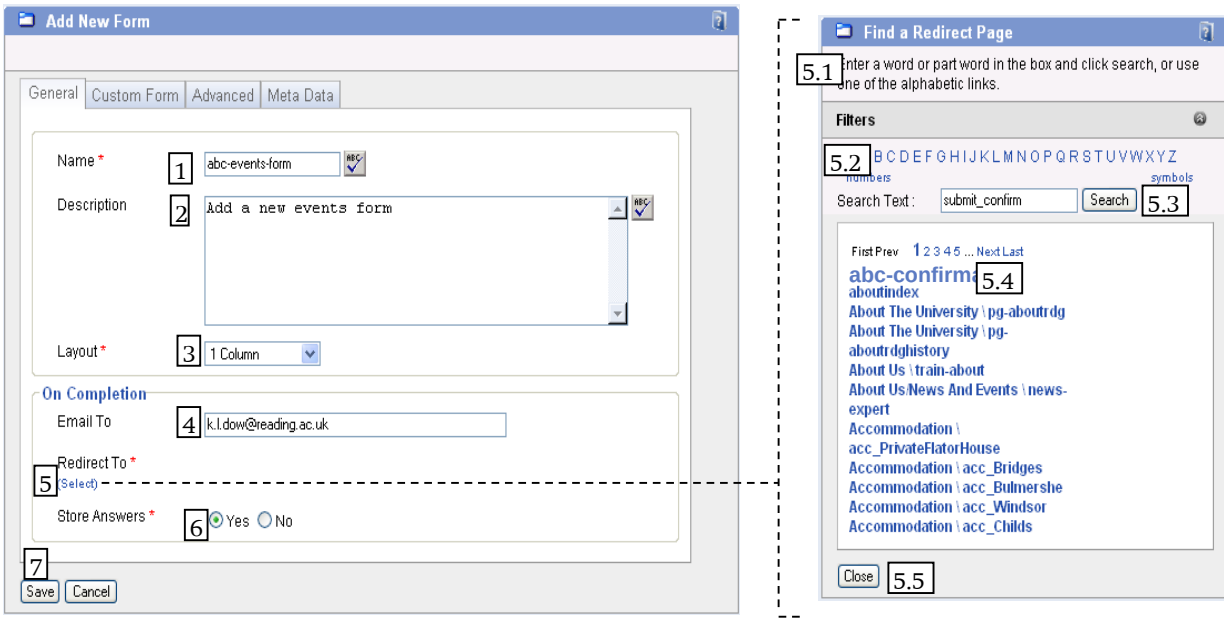


To create your form:

1. **Right** click over the **Form Manager**
2. Select the **Add** task
3. Left click on the **Form** task

An **Add New Form** window will appear in the right-hand pane. Fill in the form with your details as follows:

1. This is the **name** of the form, and is used as an **internal reference** within the CMS only. It should begin with your School, Department or Directorate prefix – followed by the name of the form. This name should be unique within the CMS
2. This field does not need to be filled in (any text entered here will appear above the form, but it is easier to enter this on the web page)
3. The layout must always be set to **1 column** only, to fit within the allocated space in the University templates
4. If you would like form responses to be e-mailed to you, fill in your e-mail address here, otherwise leave this field blank. Note that you can have more than 1 e-mail address (use a **comma** to separate them)

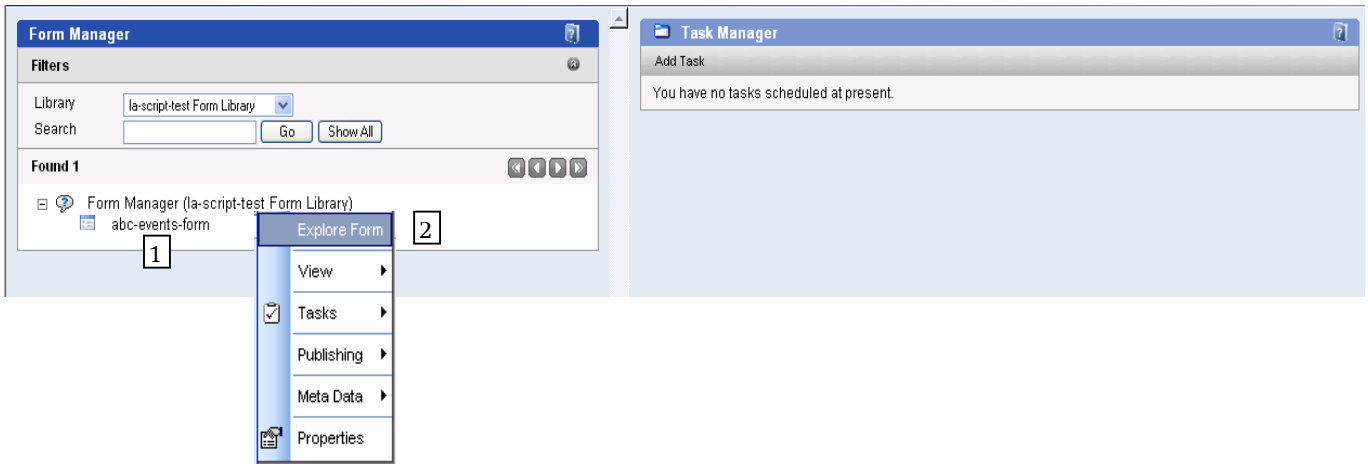


5. Click **[Select]** to find your confirmation page. In the **Find a Redirect Page** dialog box **(5.1)**, find your confirmation page either by using the **A – Z list (5.2)** or by typing in the name of the page in the **search box (5.3)**. Once you have found your page, click on it to add this to your form **(5.4)** - if no page is found then it needs publishing first. Finally press **[Close] (5.5).**
6. If you would like form responses stored in the CMS, select **[Yes]**.
7. **[Save]** the form properties

Adding questions

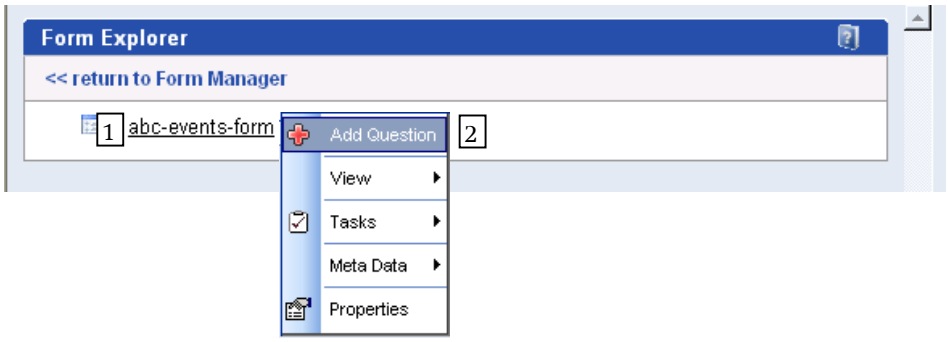
The next step is to add questions to your form:

1. **Right** click over your form
2. Choose **Explore Form**



In the **Form Explorer**, add your questions.

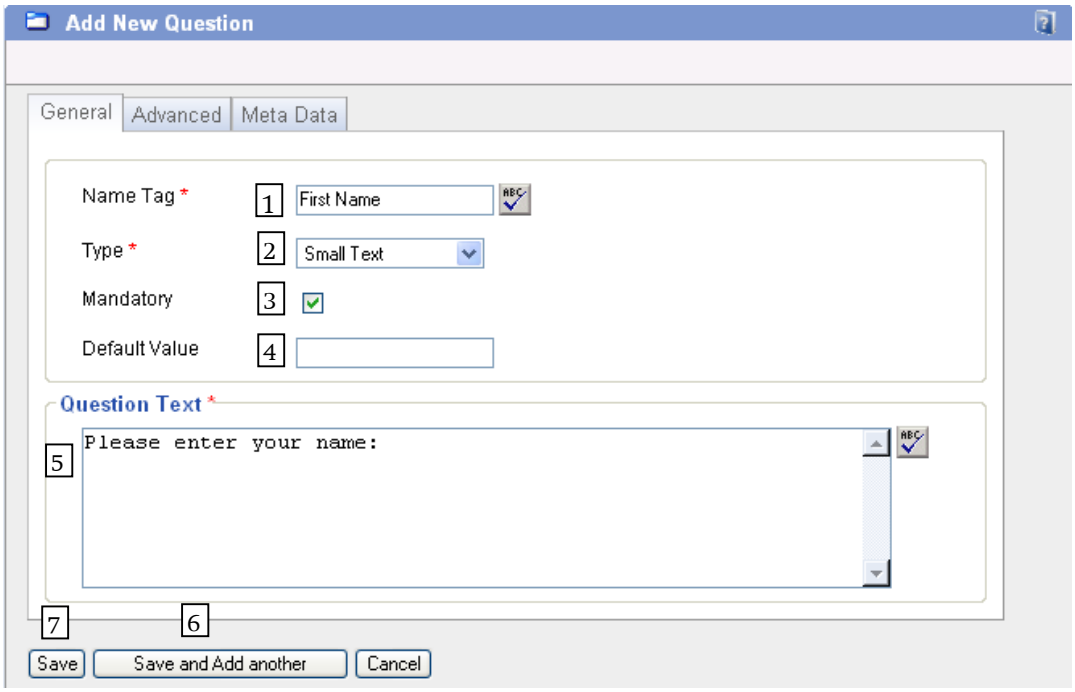
1. **Right** click over your form
2. Choose **Add Question**



Fill in the **Add New Question** form as follows:

1. The **Name Tag** is an internal reference for the CMS only. This should be a short description of the question
2. Each question was identified as a particular type during the design process. Select the appropriate **type** here
3. Tick the **Mandatory** box if you want to prevent users from submitting forms, without filling in this question first

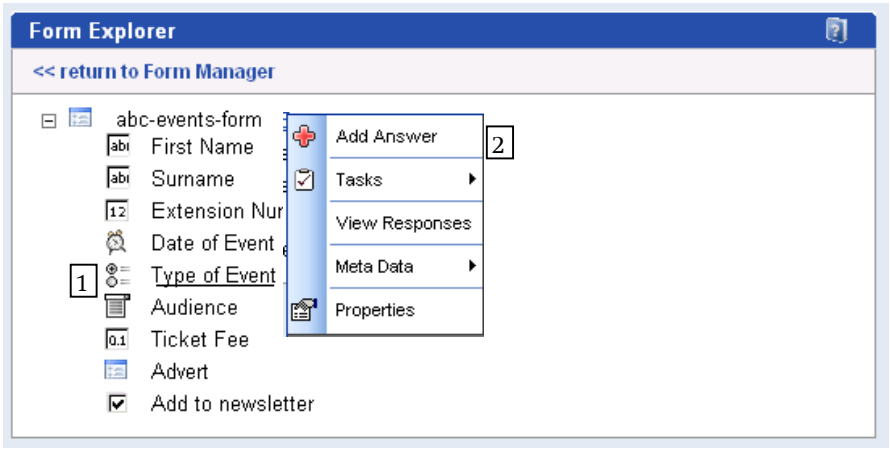
4. Enter a **default value** if you would like the answer box to be automatically filled in with a response. This response can be overwritten by the user. An example could be where you wanted the *@reading.ac.uk* email address showing
5. Enter the **question text** that you would like to appear on the form. This can be spell-checked. **Note** that certain characters may cause problems, e.g. £ (pound), @, & - you may get round this by using the HTML equivalent, as well as adding extra formatting and links in HTML
6. Click **[Save and Add another]** if you would like to add another question to your form or
7. Press **[Save]** if you have finished adding all questions to the form



Adding Answers for Radio Button and Drop Lists

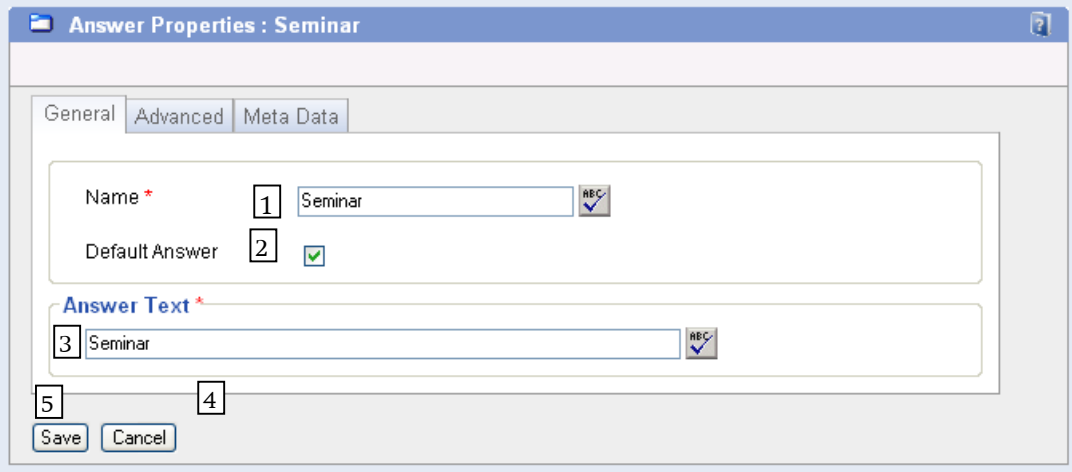
If you use either the Radio Button or Drop List type of question, you will need to add what answers will be presented on the form.

1. **Right** click over your radio button or drop list question (in this example we have used Type of Event which uses radio buttons)
2. Choose **Add Answer**



Fill in the **Add New Answer** form as follows:

1. The **Name** is the response that will be stored if this answer is selected. For ease of use, this should be the same as the **Answer Text** field below
2. Tick this box if you want the answer text to appear as the **Default Answer**
3. The **Answer Text** is the label shown for the answer on the form and should be the same as the **Name** in step 1 above
4. Click **[Save and Add another]** if you would like to add another answer for this question or
5. Press **[Save]** if you have finished adding answers



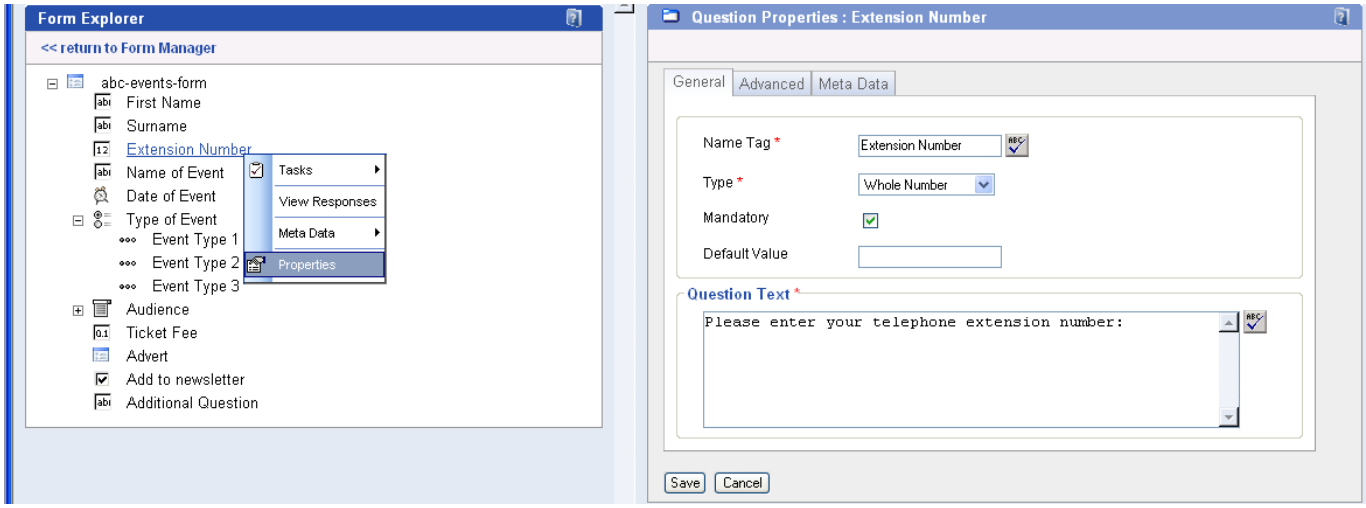
Note that from the **Tasks** menu option, one can **copy a question** (and answers if appropriate) from the form you are creating to another form that you have access to.

As you have seen, one can use the CMS to create fairly simple forms. The only other extra options that are available are from the **Custom** and **Advanced** tabs when one adds a new form.

Amending Forms

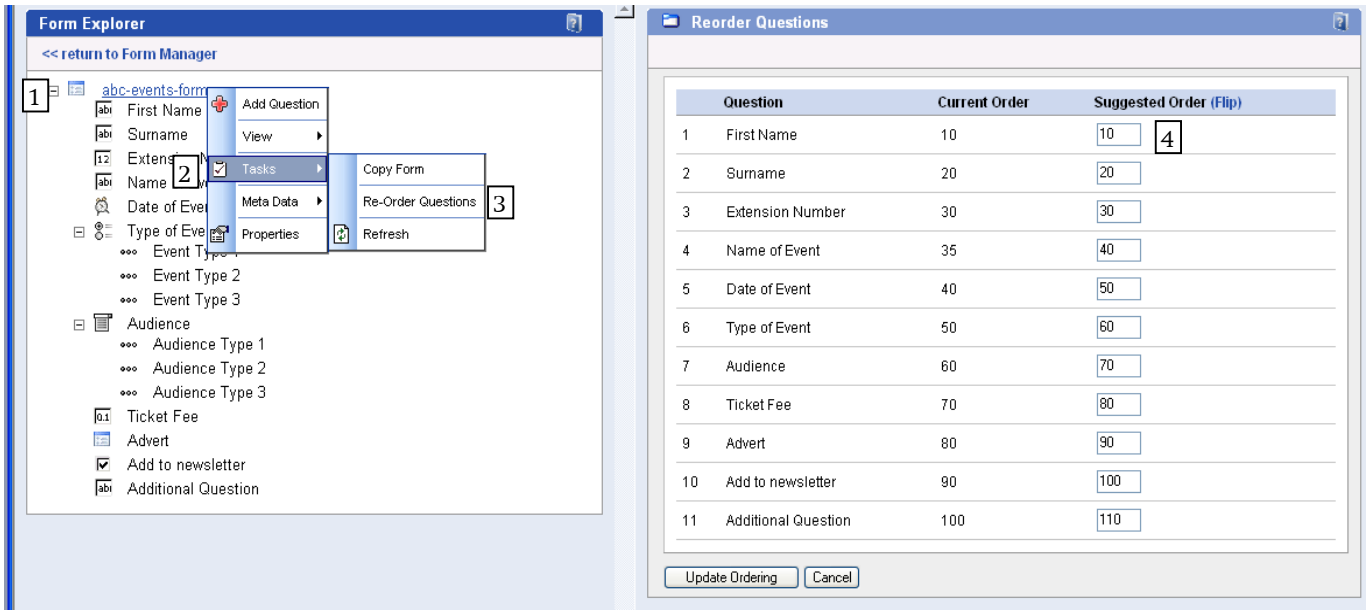
Amending questions and answers

To change questions and answers **right** click over them and edit the **properties**



To change the order of questions

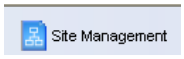
1. **Right** click over the name of the form
2. Select **Tasks**
3. Select **Re-Order Questions**
4. The order of questions is determined by a numbering system, the lower the number the higher up the form the question will appear



You can also re-order answers to a question in a similar way (right click on the appropriate question as the first step).

To Add a Form to a Page

Once the form has been created, it will need to be added into a page for viewing.

Click on the **Site Management** icon 

in the top toolbar and then click on the **Area Manager**

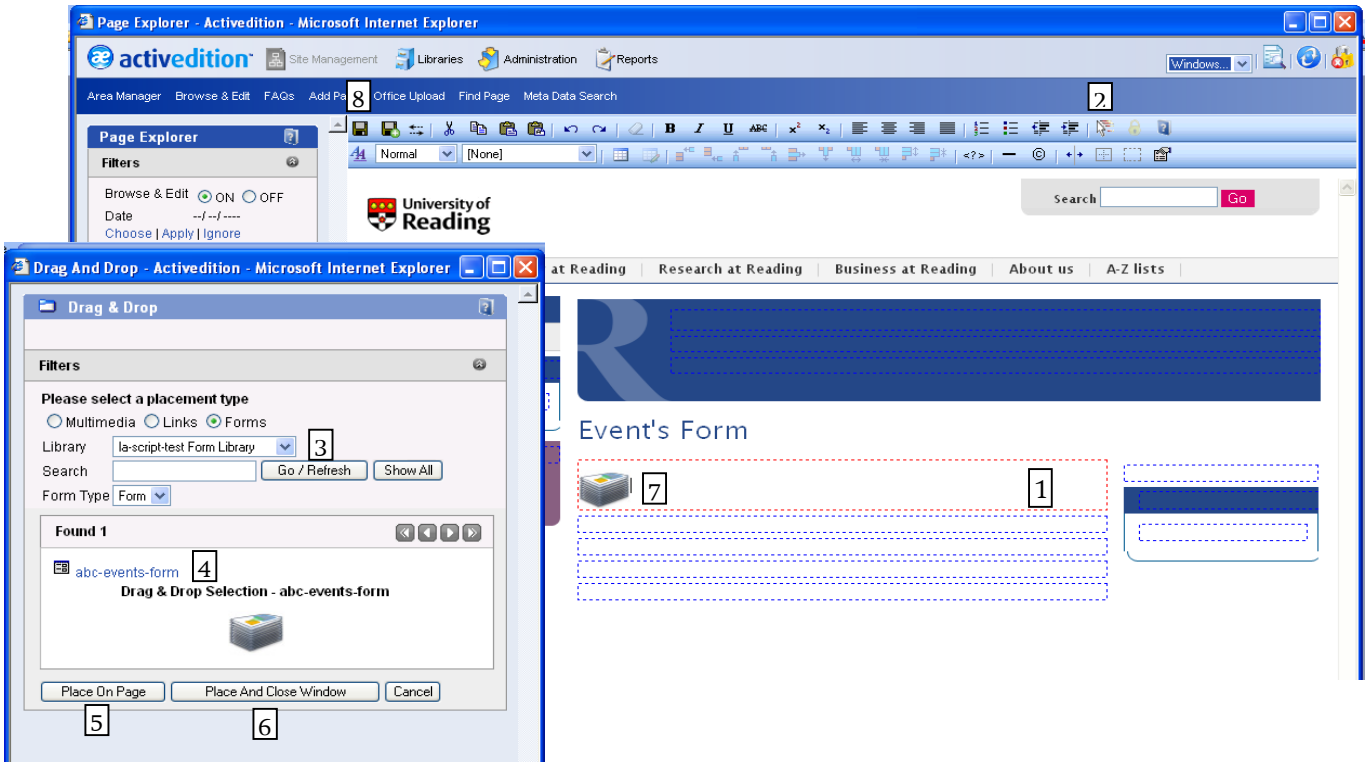
link in the toolbar below.

In the *Area Manager*, navigate to the page which you want to add the form to and click on it to open the page.

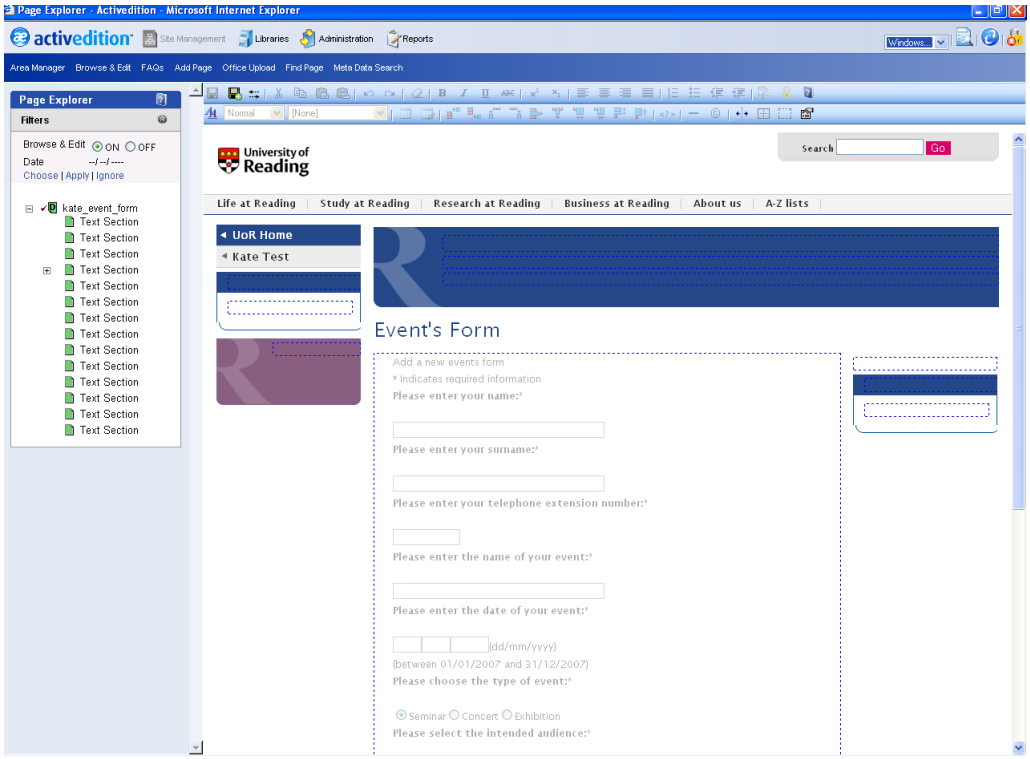
NB. It is important that you thoroughly test your form before adding this to a live area. The easiest way to do this is to insert the form into a test page, which is not linked to your live area and publish this first. Once you are sure that your form is correct, this page can be removed and the form added to a page in the live area.

1. Open the page and click in the **first box** in the **middle** column under the **page heading** (this will turn red once clicked in. An alternative to Drag and Drop is to **place** the form on the page)
2. Click on the **Drag and Drop** icon on the page toolbar. The *Drag And Drop* dialog box will open. Click on the **Forms radio button**
3. In the *Drag And Drop* window, select your school from the **Library** drop down list
4. Select the **form** that you wish to add from the list shown
5. Choose either **[Place on Page]** to add the form and leave the dialog box open or

6. Choose the **[Page and Close Window]** to add the form and close the dialog box (note that you could also drag the form icon into the relevant box on the page)
7. The **form icon** will now display in the section
8. In order to preview the form you must first **save** the page containing your form



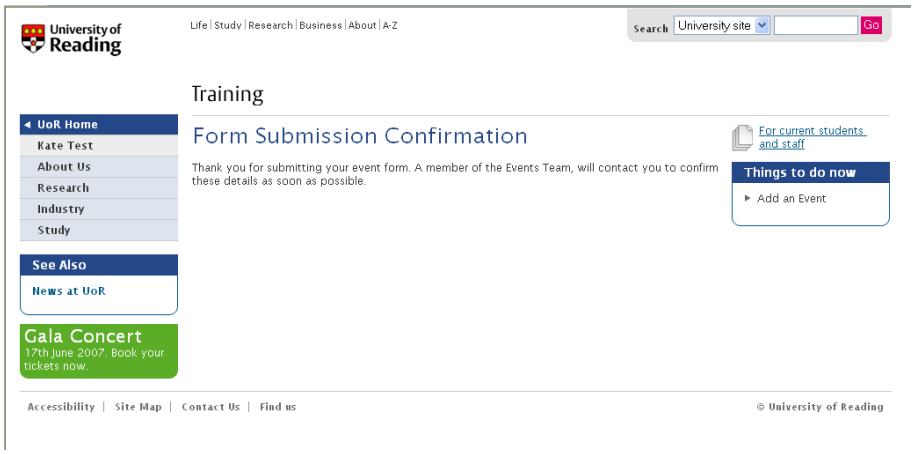
Once saved the form should now display within the CMS as below:



9. Make sure that you now **submit** and then **publish** this page with the form

About Confirmation Pages

Form submission confirmation pages should thank the user for submitting their form and give them details as to what will happen next e.g. you will be contacted, your prospectus will be sent out etc. When this page is created, it should be saved within the same sub-area as the page that the form is accessed from, to ensure that the menu remains consistent.



You might possibly come across an occasion when trying to submit the form that it comes up with an **error rather than allowing you to submit**. If this occurs, you need to:

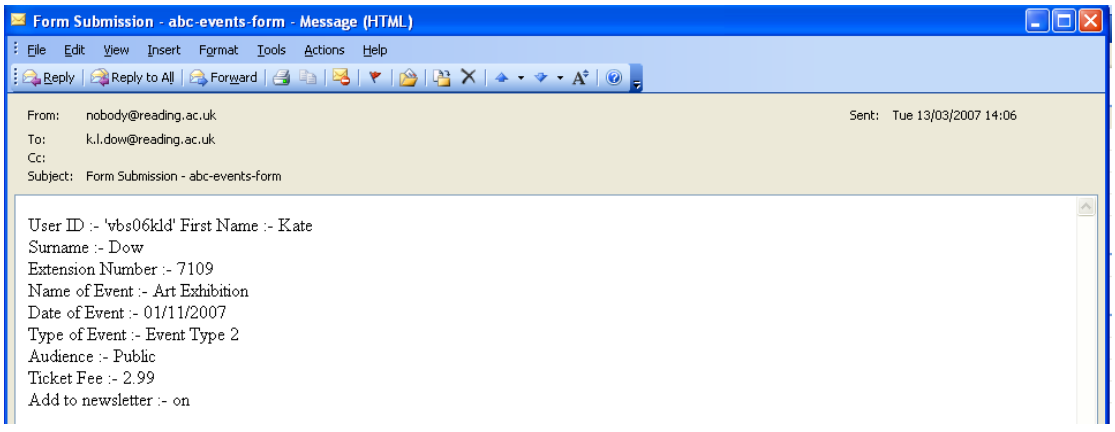
1. **Open the page** that contains the form
2. **Open the Text Section** that contains the form and **delete the HTML** code that is there
3. **Drag and Drop** the form onto the page again
4. Check in the Text Section that there is a **Form Placement** - if there is then you know that it has been successful
5. **Save** and **publish** the form again and then test the form out by **viewing the published page** and filling in and submitting the form

Viewing Responses

Depending on how you have set up your form, you may be able to view the responses as email messages and/or within the CMS.

Email Responses

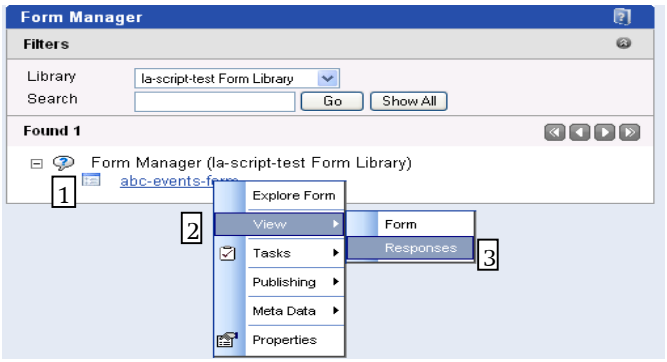
These will be delivered to the mailbox specified in your form properties.



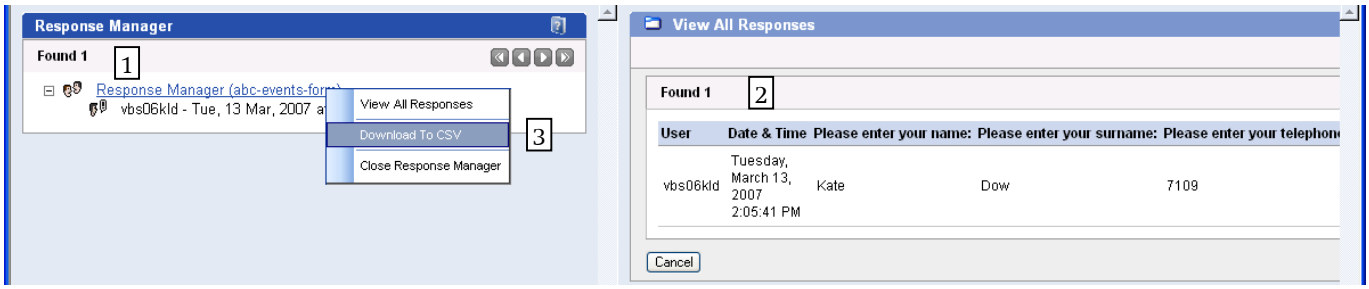
CMS Responses in Response Manager

If **Store Answers** was selected when setting up your form, you can view all responses within the *Form Manager*:

1. **Right** mouse click over the name of your form
2. Select **View**
3. Select **Responses**



You will then be taken to the *Response Manager* as below:



1. **Right** click over **Response Manager (form name)** and choose either
2. **View All Responses** to show all responses in a tabular view or
3. **Download to CSV** to download a CSV file which can then be used to import your responses to a compatible spreadsheet or database (this can be misleading as the download is completed even though it says 0%). The default program for download is usually Excel if that is on the computer

Note: Sometimes the Download to CSV gives a **less number** of responses than can be seen within the Response Manager. This is probably due to the fact that some of the replies to the form contained some **strange** characters (usually translations from other languages), and so Excel downloads the form responses up to where the first error was reached. To get round this, you need to do something like the following:

1. Copy as much of the text from the **bad** response in the Response Manager when you view the response there, and paste it into a new Excel spreadsheet (or text file), removing any **strange** characters
2. Delete the **bad** response from the response Manager by **right** clicking on the response and choosing **Delete Response**
3. **Close** the *Response Manager* window and then open it again as above (to completely clear bad responses). In the worst case, logout and back in again to the CMS.

Try the Download to CSV again. If it still doesn't download all the responses then repeat the above steps for the next bad response. If you can't get the above to work then contact its-help@reading.ac.uk

Deleting Responses from the Response Manager

Although one can delete individual responses fairly easily (as shown in the previous section), there is no option to delete all responses in one go. A longish workaround that has been used successfully goes as follows:

1. Create a **new form** with a **similar name** to the original (e.g. add 2 at the end) and set it up with the same **email** and **redirect to** as the original
2. **Right** click on the **original** form and choose **Explore Form** to go into the *Form Explorer*
3. **Right** click on the **form name** at the top, and choose **Tasks** followed by **Copy Form**
4. Select the **new form** that you created as your **destination form** and click on **[Copy]**

The new form should now have the same questions and answers as the original form, but no responses.

You may want to check the new form is working by testing it on a dummy page. Once this is done, you could either:

- Remove the original form from the relevant page, and drag and drop the new form on to the page and republish the page, or
- Delete the original form and rename the new form to the original name

© Screen shot(s) reprinted with permission from C2 Software Limited
Copyright © 2014: The University of Reading
Last Revised: February 2014