# Creating & Using Forms in Contensis

15\textsuperscript{th} March 2016

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These session notes are available in alternative formats on request. For further information please contact Chris Horton in Computer Centre Room 102. (01784 41 4025, c.horton@rhul.ac.uk)

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**Introduction**

The Contensis form builder is designed to provide an easy way to create basic forms, for example to obtain information such as feedback, or names and addresses.

An example of a form such as this is the writing for the web surgery registration form.

Forms need to be created and saved in a specially created *forms* folder within your area of Contensis. For users to view the form it then needs to be inserted into a normal webpage that has been saved within your usual webpage folder within Contensis.

Before you can begin creating forms you need to ensure you have the correct permissions to do so. To do this contact the IT Service Desk requesting access for creating Contensis forms, and stating which department/area you are in and the name of the folder(s) where your webpages are normally saved.

**Creating the actual form**

1. Ensure that you are viewing Contensis.
2. Click on the *forms* folder that you have permissions to use.
3. Select *New Content*.

![Create New Content in the forms folder](image)

4. When the Create New Content in the forms folder panel displays click on *Form* under the Type to start filtering the content types heading.

5. Then enter a suitable *file name* and *Title* in the same way as when creating a webpage.
   **Note:** Forms do not require metadata to be entered.
Fields that can be added to the form

Once the form’s structure has been created the fields you require within it can be added.

The table below lists the 17 different fields that can be included in a form, along with some tips and suggestions on their use.

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<th>Field Type</th>
<th>Description</th>
<th>Tips and Suggestions</th>
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</thead>
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<tr>
<td>Textbox</td>
<td>Enables a single line of text (and/or numbers) to be entered.</td>
<td>The Enter/Return key on the keyboard cannot be used, and so if users enter any amount of text they will need to use the keyboard’s arrow keys to scroll through it.</td>
</tr>
<tr>
<td>Multi-line Textbox</td>
<td>Enables large amounts of text (and/or numbers) to word-wrap within the panel. The Return/Enter key can be used to separate lines of text.</td>
<td></td>
</tr>
<tr>
<td>Number</td>
<td>Enables only numbers to be entered into the panel.</td>
<td>If characters are entered an error message displays when the Submit button is clicked.</td>
</tr>
<tr>
<td>Checkboxes</td>
<td>Enables one or more tick boxes to be included, with multiple options allowed to be selected. If wanted, the field’s Options heading within the Field Settings tab enables these to be set to be Required. Under the Choices heading the 3 options automatically provided can be added to or individually removed, and each option’s text changed. Note: Added options display only in the Preview window (and live page), not in the Editing window. Whether the options are to display side by side or in columns can be selected under the Layout heading.</td>
<td></td>
</tr>
<tr>
<td>Radio Buttons</td>
<td>Enables a number of option buttons to be included, of which only one option can be selected. The field’s Field Settings tab offers a similar range of options as for the Checkboxes field. Note: If including questions which require yes/no type answers use Radio Buttons rather than the Dropdown field.</td>
<td></td>
</tr>
<tr>
<td>Dropdown</td>
<td>Enables an option to be selected from a list. The field’s Field Settings tab offers a similar range of options as for the Checkboxes field. Additionally, the size of the option’s panel can be changed under the Size heading. Note: If including questions which require yes/no type answers use the Radio Buttons field rather than a Dropdown field.</td>
<td></td>
</tr>
<tr>
<td>Section Header</td>
<td>Enables headings to be added within the form to create self-contained areas.</td>
<td></td>
</tr>
<tr>
<td>Page Break</td>
<td>Enables the form to be broken into multiple pages. The Page Break field adds buttons onto each page, which enable the user to move between pages.</td>
<td></td>
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### Name
Enables a field to be added that includes two panels, one for the First name and another for the Last name.

**Note:** This results in both the First and Last names appearing together in one column in the CSV output.

As it is frequently better to keep these in separate columns to enable easier searching, it may be better to use separate **Textbox** fields, one for the First name and another for the Last name.

### Postal Address
Enables a field to be added that includes separate panels for each part of an address.

**Note:** This option requires **ALL** of its individual panels to be completed by the user.

As not everyone can complete both the Address Line 1 and Address Line 2 panels, it may be better to avoid using the Postal Address field and instead use individual **Textbox** fields for each address line.

### Email Address
Enables the user to enter their email address.

**Note:** Clicking the **Submit** button will display an error message if the entry is not in the standard email format (e.g., xxx.xxx@xxx.xxx).

### Phone Number
Enables a text box to be added that includes the heading **Phone**.

**Note:** This allows both characters and numbers to be included.

### Website
Enables a webpage’s URL to be entered.

**Note:** Clicking the **Submit** button will display an error message if the entry is not entered as a normal URL, including http://

### Date Picker
Displays a calendar for the user to select a date from.

**Note:** This does not display in the editing window.

### Time
Adds separate panels for the user to enter Hours, Minutes, Seconds, and whether AM/PM.

### Upload
Enables the user to select a file to submit via the form.

### Hidden
Do not use until its use is discussed with a member of the Web Team.

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**To add a field to a form**

1. Ensure that the **Add a Field** tab below the **Content** tab in the grey bar towards the top of the screen is selected.
2. Then drag the field to be included from the left-hand panel into the **Add Form Elements Here** white box.
Adding further fields to a form
1. Ensure that the Add a Field tab below the Content tab is selected.
2. Then drag the field to be included from the left-hand panel into the right-hand white box so that it is within the dotted border.

Note: Fields can be added above or below any existing fields. They cannot, however, be positioned to the left or right (i.e. alongside) these fields.

Duplicating a field on a form
When similar fields are needed on a form, for example for the First and Last names, it can be useful to add the first field to the form, set up its setting in the Field Settings tab, and then use the Duplicate button to duplicate the field, including its settings.

The Duplicated field’s settings, e.g. Field Label can then be changed to suit the needs of the second field.

Duplicating a field when the Add a Field tab is selected
1. Ensure that the Add a Field tab below the Content tab is selected.
2. In the right-hand editing area click on the Field Label (name) of the field to be duplicated so that a dashed border displays around it and a green plus sign and red minus sign display at its bottom right.
3. Click on the green plus sign to create the duplicated field.

Duplicating a field when the Field Settings tab is selected
1. Ensure that the Field Settings tab below the Content tab is selected.
2. In the right-hand editing area click on the Field Label (name) of the field to be duplicated so that a dashed border displays around it and a green plus sign and red minus sign display at its bottom right.
3. Click on the Green Plus sign in the editing area to duplicate the field.

OR
Click on the + Duplicate button at the bottom of the Field Settings panel.
Removing fields from the form
Unwanted fields can be removed from the form via either the Add a Field or Field Settings tabs.

Removing a field when the Add a Field tab is selected
1. Ensure that the Add a Field tab below the Content tab is selected.
2. In the editing area click on the Field Label (name) of the field to be removed so that a dashed border displays around it and a green plus sign and red minus sign display at its bottom right.
3. Click on the red minus sign to remove the unwanted field.

Removing a field when the Field Settings tab is selected
1. Ensure that the Field Settings tab below the Content tab is selected.
2. In the right-hand editing area click on the Field Label (name) of the field to be removed so that a dashed border displays around it and a green plus sign and red minus sign display at its bottom right.
3. Click on the red minus sign to remove the unwanted field.
   OR
   Click on the – Delete button at the bottom of the Field Settings panel.
Changing the field’s settings

Each field that has been added to the form can have its individual settings changed via the Field Settings tab.

For example the field’s heading (Field Label) that displays above the field can be changed to one that is more appropriate.

Note: The table at the beginning of these notes that lists the 17 different fields includes a selection of Field Settings that you may need to change.

To change Field Settings
1. Click on the Field Label (name) of the field whose settings are to be updated so that a dashed border displays around it and a green plus sign and red minus sign display at its bottom right.
2. Ensure that the Field Settings tab below the Content tab is selected.
3. The Field Settings panel displays to enable you to make the changes.

Example of using Field Settings: Setting up a Checkboxes Field
1. Ensure that a Checkboxes field has been added to the form you are working on.
2. Also ensure that the Field Settings tab is selected.
3. Click on the name (Field Label) for the Checkbox that is being modified.
4. A blue right-facing arrow displays between the Field Settings panel and the Checkboxes field, indicating that this is the currently selected field.
5. Highlight the text under the Field Label heading in the Field Settings panel.
6. Then overtype this with the heading that is to be displayed on the actual form.
7. Click on the down-arrow to the right of the Layout heading in the Field Setting panel.
8. Then select whether the Checkboxes are to display as One Column, Two Columns, Three Columns, or Side by Side.
9. Under the Options heading, if the user must complete the Checkboxes options click within the check box to the left of the Required option so that it displays a tick mark.
10. Highlight the Choice One text under the Choices heading, then overtype this with the text that is to display alongside the first option on the actual form.
11. Highlight the text for any further Choice under the Choices heading that you wish to use, then overtype their text with the text that is to display on the form.
12. Unwanted Choices can be removed by clicking on the red minus sign to its right.
13. Similarly, to add a Choices option click on the green plus sign to the right of the option above where the new option is to be inserted.
   Then overtype the option’s text with that you wish the user to see on the form.
   Note: Added Choices options do not display in the editing window, only in Preview and the live webpage.
14. It should be noted that the Instructions panel should never be used.
   If help text is to be included use the Section Header field instead.
15. When finished click on the Add a field tab below the Content tab.
Viewing the Form
- When working on the form in the editing window, if at any time it cannot be seen (but you wish to view it) click on the Add a Field tab below the Content tab.
- To view the form as it will be displayed when live, click on Preview towards the top-right of the window.

Using Rules in a form
Rules can be applied to a form to enable a specific page to be displayed should the user answer a particular field, or answer a particular field in a particular way, e.g. select a particular radio button.
This, for example, enables the form to be set up so that the user sees the pages they need to, based on their responses to earlier fields.

Rules work by moving from one page that contains the rule(s) to another rule-designated page when the rule is enacted.
Therefore, for rules to be applied the form must contain multiple pages.
To enact the rule, the user must complete the form’s page that contains the rule, then when they have finished they click on the Next Page button for the relevant (rule-designated) page to appear.

Applying Rules
1. Ensure that the form contains the fields you need it to, including the one that will be used to enact the rule.
2. Also ensure that the required number of Page Break fields have been added so that the form contains the required number of pages.
3. To begin setting up the rule click on the Form Settings tab below the Content tab.
4. Click on the Edit Page Rules button at the top-right of the Form Settings panel.
5. In the right-hand editing area click on the Add a new rule button at the top-right.

6. Click on the down-arrow for the left-hand panel under the If heading to display a list of the fields available on the form.

7. From the list that displays click on the field, or field option, that is to enact the rule.
8. In the panel that displays to the right of the panel just completed, click on its down-arrow to display a list of options.
9. Select the most appropriate option from the list that displays.
10. If a panel displays to the right of the panel just completed, enter the text that is to activate the rule.
11. Click on the down-arrow to the right of the jump to panel towards the bottom of the window.
12. From the list that displays select the page that the rule is to display when enacted.
13. When finished click on the Set Rule button at the bottom-right of the window.
14. Click on the Add a field tab below the Content tab.
15. Click on Save toward the top-right of the editing window to save the changes.

   Note: Further fields can be added using the above process. However, do ensure that all rules included in the form are in use, and that any redundant rules are deleted.

Deleting Rules
Rules that are no longer required must be deleted from the form, otherwise there is a possibility that they could create problems with the form’s operation.

1. To remove a rule begin by clicking on the Form Settings tab below the Content tab.
2. Click on the Edit Page Rules button at the top-right of the Form Settings panel.

3. A list of rules currently included in the form display in the right-hand editing area.
4. Locate the rule to be deleted from the list then click on the rubbish bin at the right of the form’s description to actually delete it.

Providing a (e.g.) thank you or confirmation message
Forms can be set to show a message that displays once the Submit button has been clicked on.

This can be a text box that shows a brief message at the end of the form, or a separate webpage created within Contensis, for example like the prospectus request thank you page.

Alternatively, forms can be set to email the user with a suitable Subject and message.

When using this option it can be set to send emails that are either read-only (in which case the e-mail appears to be sent from no-reply@contensis.co.uk), or emails that can be replied to, in which case it displays with an email address that you stipulated when setting up the option.

For the email option to work an Email Address field that the user completes (to collect their email address) must be included in the form.

   Note: Wherever possible use the message or webpage option, rather than the email option, and only use the email option if the user needs a confirmation of something or further information.
Adding a thank you or completion message
1. To begin setting up the message click on the Form Settings tab below the Content tab.
2. Under the Confirmation Options heading ensure that the option button to the left of the Show Text option displays a check mark.
3. In the text box immediately below the Show Text option button enter the message that is to display immediately after the user clicks on the Submit button.
4. Under the Confirmation Options text box ensure that the tick box to the left of the Send Confirmation Email to User option does not display a tick mark.

Adding a link to display a thank you (etc.) webpage
1. To begin click on the Form Settings tab below the Content tab.
2. Under the Confirmation Options heading ensure that the option button to the left of the Redirect to Url option displays a check mark.
3. In the text box immediately below the Redirect to Url option button enter the complete and accurate URL for the webpage that is to display after the user clicks on the Submit button.
4. Under the Confirmation Options text box ensure that the tick box to the left of the Send Confirmation Email to User option does not display a tick mark.

Adding an email message the user receives on completing the form
1. To begin, ensure that an Email Address field has been included on the form.
2. Also, if it is important that the user receives an email ensure that the Email Address field is set to be Required on the Field Settings tab.
3. Click on the Form Settings tab below the Content tab.
4. Under the Confirmation Options heading ensure that the tick box to the left of the Send Confirmation Email to User option displays a tick mark.
5. Click on the down-arrow to the right of the panel below the Send To heading. Then select the Field Label (name) of the Email Address field.
6. If you wish the user to be able to reply to the email enter the email address that is to receive the reply in the Reply To panel.
7. In the Confirmation Email Message text box enter the message text that is to be included in the email.
8. Although the form is being set up to send an email to the user, either the **Show Text** or **Redirect to Url** option button below the **Confirmation options** heading will display a check mark, and thus enabled.

9. Therefore:
   - **IF** only an e-mail is to be sent and so **neither** a message nor webpage is to be displayed after the user clicks the **Submit** button click on the **Show Text** option button so that it displays a check mark. Then ensure that the text box below the button does **not** contain any text.
   - **IF** a message is to be displayed in addition to the e-mail follow steps 2 & 3 within the section **Adding a thank you or completion message**.
   - **IF** a webpage is to be displayed in addition to the e-mail follow steps 2 & 3 within the section **Adding a link to display a thank you (etc.) webpage**.

### Obtaining a Form submission Notification
If you are creating a form for low levels of use or where responses may be of critical importance, you can set the form to send an email to you stating that a form has been submitted.

![](image)

If necessary you can then setup an Outlook inbox rule to filter the notifications you receive into a particular folder.

### Setting up a Notification
1. To begin, click on the **Form Settings** tab below the **Content** tab.
2. Click within the panel below the **Notification Options** heading.
3. Then enter on separate lines all of the Royal Holloway e-mail addresses to which the notification is to be sent.
4. Click within the **Message Subject** panel then enter the text that is to appear as the Notification’s Subject.
Adding the form to a webpage

When you have completed, tested, submitted and approved the form it must be added to a webpage as a web control.

Note: Webpages that are to contain a form must be based on the StandardForm template (i.e. not the StandardPage or LandingPage template), otherwise some of the form’s fields will not work, e.g. Date Picker and Upload fields.

It must be also noted that forms are added to a webpage by inserting them as a webcontrol, not by dragging them onto the webpage.

To add the form

1. In Contensis open the webpage into which the form is to be inserted.
2. Right-click where the form is to appear in the central content box of the webpage.
   Note: The form can be placed above and/or below other content on the webpage but it does require the full width of the central content box
3. Select Insert webcontrol from the menu that displays.
4. Select Standard from the submenu that displays.
5. Select Form from the third menu that displays to open the Form dialogue box
6. To locate the form to be inserted click on Browse to display the CMS Content Browser dialogue box.
7. Under the left-hand WWW heading click on the right facing arrow alongside the folder in which your forms folder is located to expand it.
8. Then locate and expand your forms folder in which the form to be inserted is saved.
9. Locate the form that is to be added to the the webpage and click on it to select it.
10. Click on Save at the bottom right of the dialogue box to close the CMS Content Browser dialogue box.
11. Click on Save to close the Form dialogue box.
12. A Form icon is displayed in the webpage indicating that the form has been added to the webpage.
   Note: To actually view the form you need to run a preview by clicking on Preview towards the top right of the screen.
Viewing the form’s user responses
User responses can be managed from the Form Viewer dialogue box. They can then be either viewed within this dialogue box, or downloaded as a CSV file to be viewed in Excel.

To access the Form Viewer dialogue box
1. Click on the Form Posts button to the right of the Contensis button.
2. The Form viewer dialogue box displays at the right of the screen.

To access the user responses within Contensis
1. Ensure that the Form View dialogue box is displaying (see the section Viewing the form’s user responses).
2. In the listing that displays locate the form whose returns you wish to view.
3. Click on View Posts under the Options heading in the right-hand column.
4. To view an individual user’s response click on View at the right of their return.
5. When you have finished return to the form’s listing by clicking on Back to previous screen at the right of the black band above the listing.

To access the user responses within Excel
1. Ensure that the Form View dialogue box is displaying (see the section Viewing the form’s user responses).
2. In the listing that displays locate the form whose returns you wish to view.
3. Click on Export Posts to CSV under the Options heading in the right-hand column.
4. A downloaded CSV file will be created via the browser’s normal file download facility.
5. When the downloaded file is clicked on the form’s results will display in Excel.