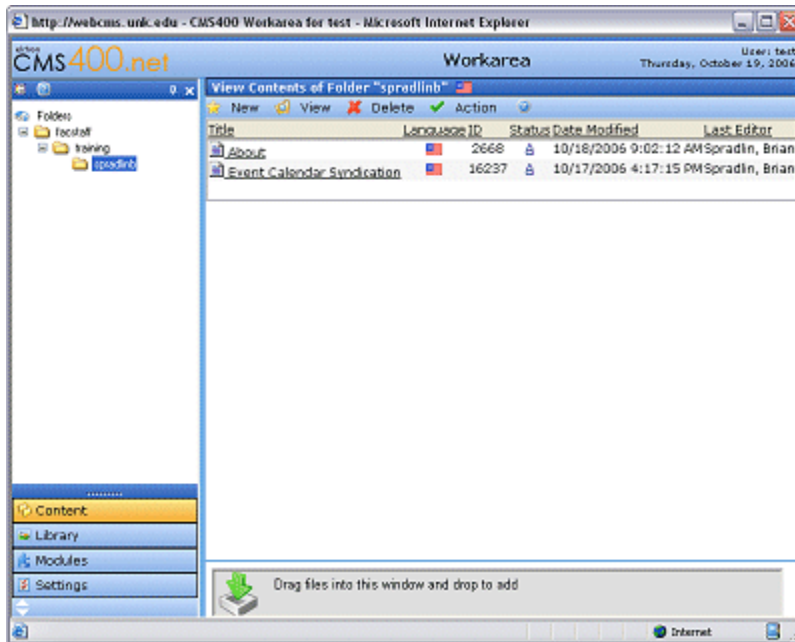
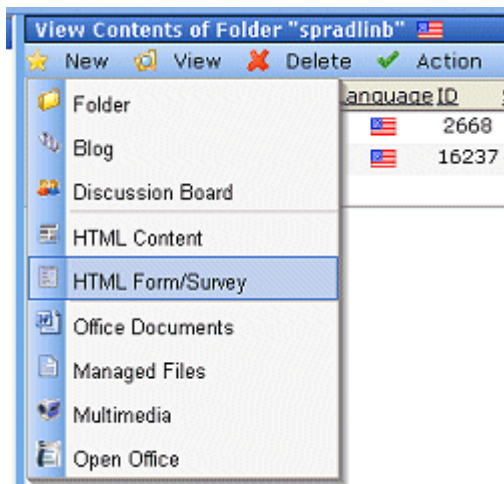


## Creating Online Forms in Ektron CMS400.NET

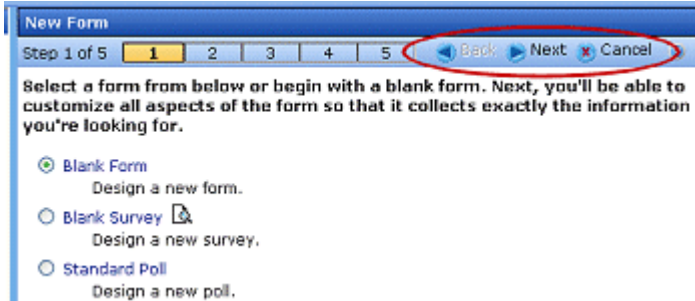
Online forms in the Ektron system have many, many options available. This allows you to create useful points of contact between you, the UNK pagemaster, and visitors to your website. However, the multitude of options also makes the creation of forms somewhat confusing without some guidance. This set of instructions is intended to help guide you through the creation of a simple form in Ektron, using the most popular options that are available to you.



To create a form you must first log in to the Ektron system and open the Workarea window. In the Workarea, click on the Content button at the bottom-left corner and navigate to the folder that you have permission to edit and add content to. Ektron CMS400.NET no longer separates “Content” from “Forms” in the Workarea, so both can be found and created in the main “Content” area.

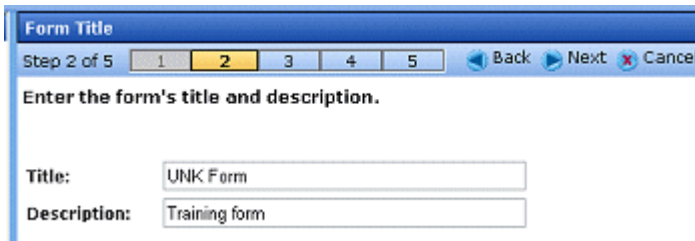


To create your first form move your mouse over the **New** menu item and choose **HTML Form/Survey** from the list that appears. This will begin the “Wizard” process that steps you through the form creation.



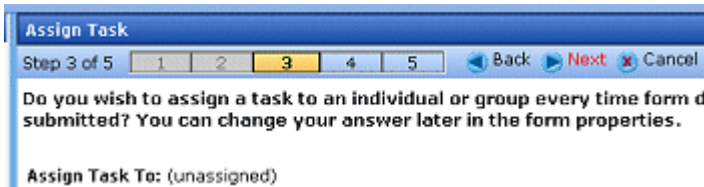
The screenshot shows the 'New Form' wizard interface. At the top, it says 'Step 1 of 5' with a progress bar showing steps 1 through 5. Step 1 is highlighted. To the right of the progress bar are three buttons: 'Back', 'Next', and 'Cancel'. The 'Next' button is circled in red. Below the progress bar, there is a text instruction: 'Select a form from below or begin with a blank form. Next, you'll be able to customize all aspects of the form so that it collects exactly the information you're looking for.' Below this instruction are three radio button options: 'Blank Form' (selected), 'Blank Survey', and 'Standard Poll'. Each option has a sub-description: 'Design a new form.', 'Design a new survey.', and 'Design a new poll.' respectively.

The first step gives you a set of form or survey types that are pre-created OR the ability to create a blank form or poll. This guide does not cover the pre-created forms or polls, so for this step you should choose **Blank Form** and click the **Next** button in the upper-right corner.



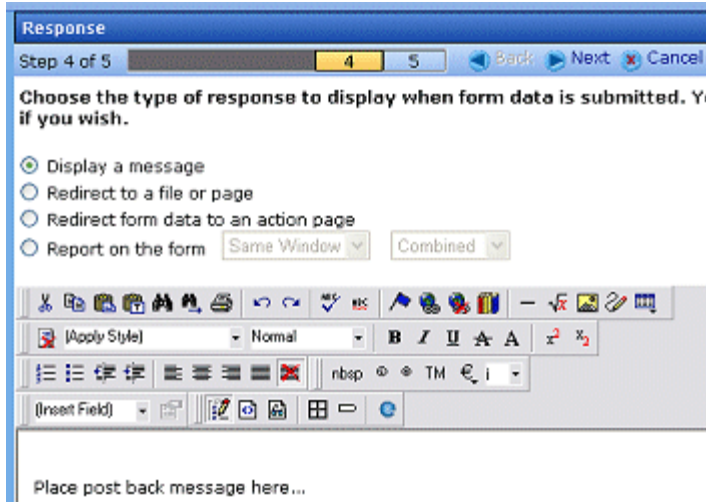
The screenshot shows the 'Form Title' wizard interface. At the top, it says 'Step 2 of 5' with a progress bar showing steps 1 through 5. Step 2 is highlighted. To the right of the progress bar are three buttons: 'Back', 'Next', and 'Cancel'. Below the progress bar, there is a text instruction: 'Enter the form's title and description.' Below this instruction are two text input fields. The first field is labeled 'Title:' and contains the text 'UNK Form'. The second field is labeled 'Description:' and contains the text 'Training form'.

Step two asks you for the form Title (which will appear as the page title when viewing the form on the UNK website) and a Description. The description will only be visible in Ektron and is there for your benefit. It does not appear anywhere on the form when viewed through the website.

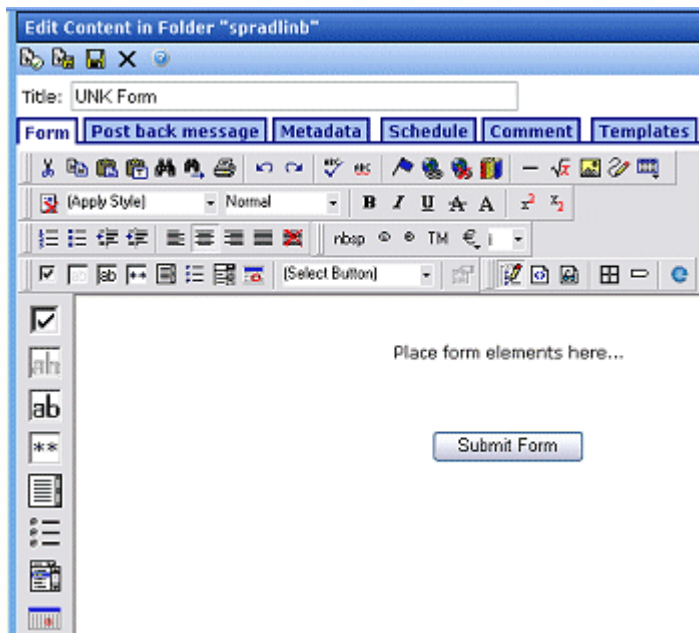


The screenshot shows the 'Assign Task' wizard interface. At the top, it says 'Step 3 of 5' with a progress bar showing steps 1 through 5. Step 3 is highlighted. To the right of the progress bar are three buttons: 'Back', 'Next', and 'Cancel'. Below the progress bar, there is a text instruction: 'Do you wish to assign a task to an individual or group every time form d submitted? You can change your answer later in the form properties.' Below this instruction is a text input field labeled 'Assign Task To:' which contains the text '(unassigned)'. There is also a small 'x' icon to the right of the field.

Step three is an assignment step, but since UNK does not currently use the Tasks option in Ektron you can simply continue to step four.



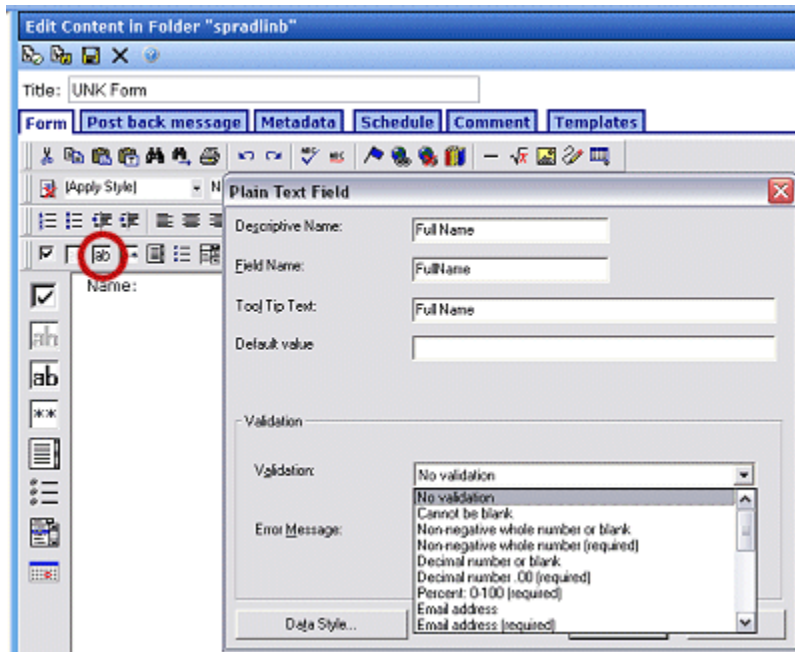
Here you are asked to write the “post back message” text. This is the text (or image or link) that will appear on the screen when a visitor successfully submits your online form. There are four options for how the form data can be redirected, but for most forms you will want to use the **Display a message** option. Just enter the text in the available box at the bottom of the screen. You can add images, links to other pages, tables, etc. When your message is complete, continue to step five.



Step five is where you add the components of your online form. The first change you will want to make is to delete the **Place form elements here...** text from the screen. You will be adding your form fields above the **Submit Form** button, so we will leave just that button on the screen to begin.

## Plain Text Field

The plain text field is the most common element of a form you will use. It allows a visitor to enter a short word or sentence of text. To add this field to your form, click the **Plain Text Field** button in your editor, which is circled in the image below.



The text field will appear wherever your cursor was blinking before clicking the button. Here we fill in several values:

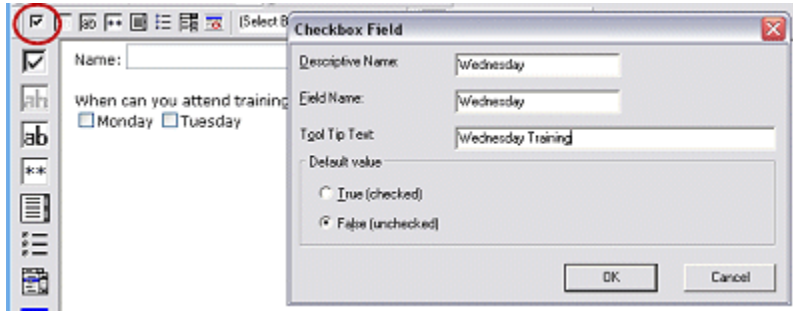
- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a "tool tip" will appear under a visitor's cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.
- **Default Value:** If you want the field to already have some text in it when a visitor views the page, enter that text in the Default Value area. Leave it blank if you want the field to be blank by default.
- **Validation:** In CMS400.NET you apply validation to an element immediately before adding it to a page. Simply choose a validation option from the menu available.
- **Error Message:** If you choose a Validation option, enter the error message that will appear on the screen for the visitor if the form is submitted without passing the validation check.

Click the OK button to add the field to your form. You can have as many text fields on a form as you want, but each form **MUST** have a unique Field Name. You can not have two text fields on a form with the same name or the form will only be able to email one of them to your email address.

Once the Text Field has been added to your form you can resize it by clicking once on the field to highlight it, then using the white squares at the right to stretch or shrink it. This **does not** limit the number of characters entered in the field, it only changes the displayed size of the box on the screen.

## Checkbox Field

The Checkbox Field gives your visitors the ability to select multiple options from a list you provide.



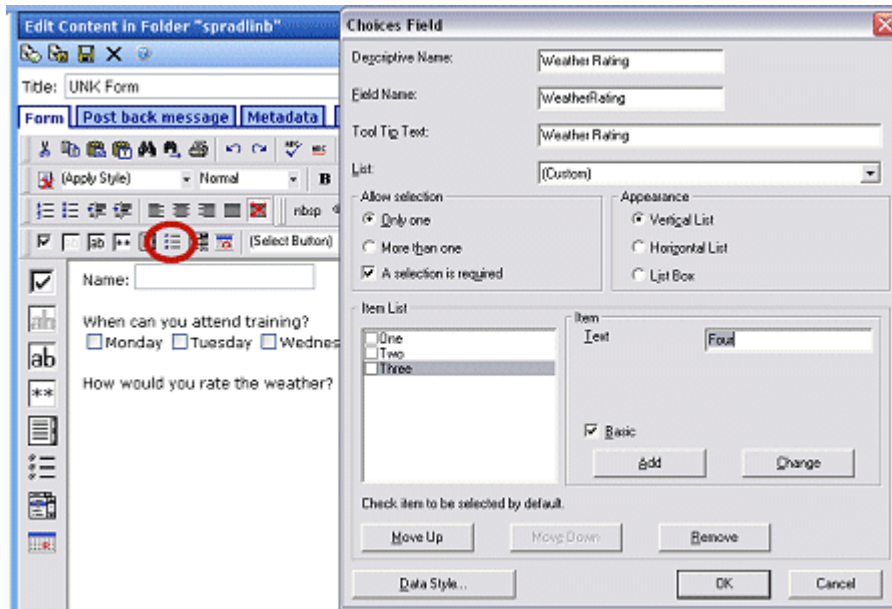
To add a Checkbox to your form you **do not** need to add text to your screen first. Just click the Checkbox Field button (circled above) and fill in the details:

- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you, and the text that appears on your form after clicking OK.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a “tool tip” will appear under a visitor’s mouse cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.
- **Default Value:** True or False, select False if you want the box unchecked by default, or True if you want it checked by default when a visitor views your form.

Click OK to add the checkbox AND the Descriptive Name text to your form. You can edit the text after it is added to your form at any time. You can have as many checkboxes on your form as you want as long as each one has a unique Field Name. You can not have more than one checkbox on a form with the same Field Name or the form will only be able to email one of them to your email address.

## Choices Field

Unlike the Checkbox Field, a Choices Field creates a list of options that a visitor will usually choose just one option from. This field has a number of settings to work through in order to add it to your form.



First, to add this option to your form click the **Choices Field** button in your editor, as circled above. Then fill in the settings that appear:

- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a “tool tip” will appear under a visitor’s mouse cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.

Next we have the List options:

- **Allow Selection:** Only one or More than one. Those options are self-explanatory. Checking the box “A selection is required” will require the visitor to choose at least one option before the form can be submitted.
- **Appearance:** Horizontal or Vertical will space your list options horizontally or vertically on the screen. List Box will put the options into a single box in which a visitor would click on the text they want to select.

Item List is where you add your list options:

- First, enter a name in the **Text** field at the right. Keeping the checkmark in Basic will ensure that the text visible in the list on the form will be the same as the text emailed to you if that option is selected. Those two can be different if you wish.

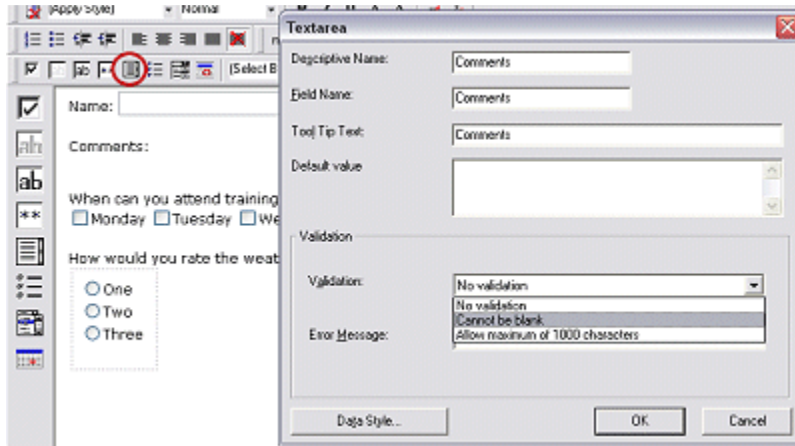
Just uncheck the Basic box and enter two different values. However, most people can keep the Basic setting checked.

- Add the option to your list by clicking the Add button. Your option will appear in the **Item List** at the left. Add as many options as you would like.
- Change the text of an item by clicking on the name in the **Item List**, updating the Text on the right and then clicking the Change button.
- Reorder your item list using the **Move Up** and **Move Down** buttons. Remove items with the **Remove** button.

When all options have been added to your list click the OK button. Your Choices Field will be surrounded by a grey dotted line on the screen to show that those options all belong to a single group. You can have as many Choices Fields on a form as you would like as long as each one has a unique Field Name.

## Textarea

The Textarea is most commonly used as a “comments” box for visitors, or where you require more than a single line of text to be entered in the form. Click on the **Textarea** button and fill in the options that appear.

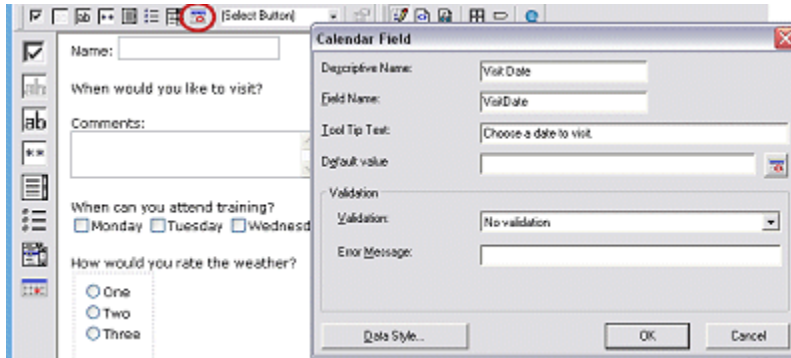


- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a “tool tip” will appear under a visitor’s mouse cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.
- **Default Value:** If you want the field to already have some text in it when a visitor views the page, enter that text in the Default Value area. Leave it blank if you want the field to be blank by default.
- **Validation:** In CMS400.NET you apply validation to an element immediately before adding it to a page. Simply choose a validation option from the menu available.
- **Error Message:** If you choose a Validation option, enter the error message that will appear on the screen for the visitor if the form is submitted without passing the validation check.

Click OK to add the Textarea to your form. You can have as many textareas in your form as you need, as long as each one has a unique Field Name. Once a textarea is added to a form you can resize it by clicking once on the textarea box to highlight it. Then drag the white squares around the outside of the box to make it larger or smaller. This **does not** limit the number of characters entered in the field, it only changes the displayed size of the box on the screen.

## Calendar Field

New to CMS400.NET is the ability to add a Calendar Field button to your form. This button will pop up a calendar box, letting people visiting your form click on a date to add it to the form field automatically. Add the field using the **Calendar Field** button circled in the image below.

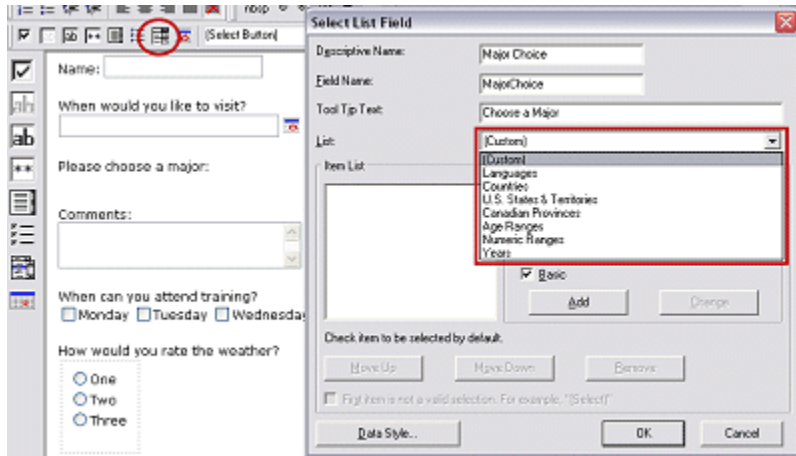


- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a “tool tip” will appear under a visitor’s mouse cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.
- **Default Value:** If you want the field to already have a specific date in it when a visitor views the page, enter that date in the Default Value area. Leave it blank if you want the field to be blank by default.

You can have as many Calendar Fields on a form as you want, as long as each one has a unique Field Name.

## Select List Field

The Select List adds a drop-down menu to your form. You can have as many options in a single Select List as you would like to add. Click the **Select List Field** button, circled below, to start the process.



- **Descriptive Name:** This is the name that will appear in the form data that is emailed to you.
- **Field Name:** This name will fill itself in automatically based on what you enter for the Descriptive Name, removing any spaces or unusable characters.
- **Tool Tip Text:** In newer browsers (Internet Explorer and FireFox) a “tool tip” will appear under a visitor’s mouse cursor if they move the mouse over a form field. You can have these tool tips list instructions or descriptions, or leave them completely blank.
- **List:** CMS400.NET includes a number of common drop-down menu lists that you can use immediately. Lists of the US States and Territories, Languages, Age Ranges and Countries can all be selected. Unfortunately, none of those lists can be edited once selected. However, if one of the lists works for your purposes, simply click the OK button to add it to your form.

Once the descriptions and names have been entered you can add, modify and remove items from the drop-down list exactly as you would for a **Choices Field**. You can only add items if the **List** option is set to Custom:

- First, enter a name in the **Text** field at the right. Keeping the checkmark in **Basic** will ensure that the text visible in the list on the form will be the same as the text emailed to you if that option is selected. Those two can be different if you wish. Just uncheck the **Basic** box and enter two different values.
- Add the option to your list by clicking the **Add** button. Your option will appear in the **Item List** at the left. Add as many options as you would like.
- Change the text of an item by clicking on the name in the **Item List**, updating the Text on the right and then clicking the **Change** button.
- Reorder your item list using the **Move Up** and **Move Down** buttons. Remove items with the **Remove** button.

- Check the **First item is not a valid...** option if you want the first item in the list to not be selectable. This is usually enabled if the first item in your list is something similar to “Select an option.”

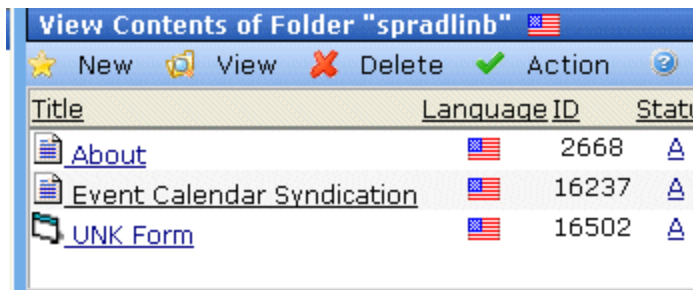
Once the item list has been filled, click the OK button to add it to your form. You can have as many Select List Fields in your form as you need, as long as each one uses a unique Field Name.

## Setting Form Properties (Email vs. Database)

You may have noticed that none of the steps in the form “wizard” or the form editing fields allowed you to specify an email address to send the completed form data to when it is submitted online. This is because CMS400.NET leaves those options as a separate step entirely, only accessible after you have published the form for the first time.

In order to make changes to the form properties you must first **Publish** the form you have created. Like all content blocks at UNK, the Title and Description metadata must also be filled in before a form can be published.

Once the form is published you will be returned to the Content listing in your Ektron workarea. In this view you should see any forms you have published alongside any content blocks, as in the image below.

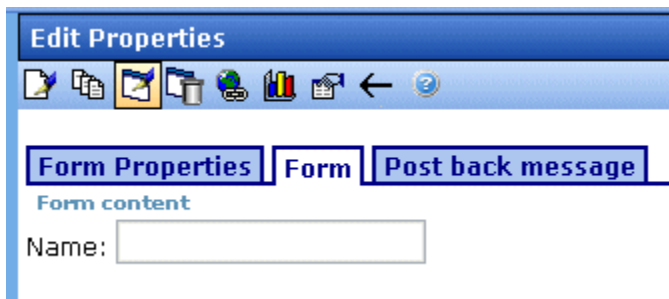


The screenshot shows a web interface titled "View Contents of Folder 'spradlinb'". It features a toolbar with icons for "New", "View", "Delete", and "Action". Below the toolbar is a table with the following columns: "Title", "Language", "ID", and "Status".

Title	Language	ID	Status
<a href="#">About</a>		2668	<a href="#">A</a>
<a href="#">Event Calendar Syndication</a>		16237	<a href="#">A</a>
<a href="#">UNK Form</a>		16502	<a href="#">A</a>

If you **do not** see your form and only see the other pages you have created, choose **All Types** from the **View** menu. This should display both content and forms together.

To change the form properties you first click on the name of the form to open a preview of it. At the top of this view you should find a **Edit Properties** button, as highlighted in the image below.



The screenshot shows the "Edit Properties" screen for a form. It has a toolbar with various icons. Below the toolbar are three tabs: "Form Properties", "Form", and "Post back message". The "Form Properties" tab is selected. Underneath, there is a section labeled "Form content" with a "Name:" label and an empty text input field.

Clicking this button will bring up the Ektron form properties screen, with the Email options that we need to set.

**Title:** UNK Form

**Description:** Training form

**Form Data:**  Mail  Database  Autofill form values  
 Limit submissions  Number Of Submissions

**Assign Task To:** (unassigned)

**ID:** 16502

---

**Mail Properties**

**To:** webmaster@unk.edu  
OR to addresses in field: (No field selected) ▼

**From:**   
OR from address in field: (No field selected) ▼

**CC:**   
OR to addresses in field: (No field selected) ▼

**Subject:** Training form submission  
OR use text in field: (No field selected) ▼

**Preamble:**   
OR use text in field: (No field selected) ▼

Send data in XML format

By default, any new form you create in Ektron will be set to **Database** only! In order to have the form data emailed to a specific address you must place a checkmark next to **Mail** at the top of the screen. You can uncheck the Database option if you will not need a stored record of your form submissions beyond what is emailed to you.

There are several other options available here as well:

- Title and Description: Changes the Title and Description of the form.
- Autofill form values: This option pertains to other Ektron users filling out a form only, so leaving it checked or unchecked will make no difference.
- Limit submissions: If you will only be accepting a certain number of submissions from a form or poll, set a limit for that number here.
- Mail Properties:
  - To: The email address the form data will be sent to. You can have multiple addresses, separated by commas if needed.
  - From: Normally left blank.
  - CC: Carbon Copy. This field can contain multiple email addresses, separated by commas.
  - Subject: The Subject line that appears in the email that you receive. You can enter your own text OR choose the text that your website visitor entered in any of the Plain Text Fields to become the subject instead.
  - Preamble: This text would appear at the very top of any email, before the form data was displayed. This is normally left empty.

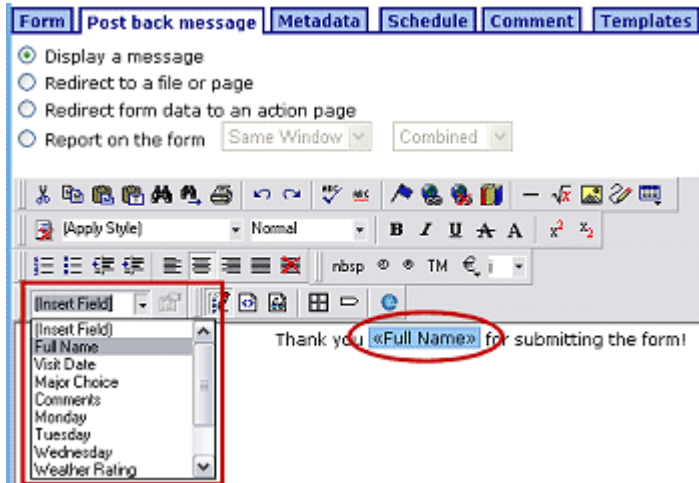
**NOTE:** If you added a Plain Text Field to your form AND set the validation for that field to **Email Only** then you can choose to use that field as the To, From or CC fields in the

Mail Properties. This allows you to have a Carbon Copy of the form data sent to an email address that the visitor enters (if they want a copy of the form sent to themselves). Or, you can choose to use that form field as the “From” address, so that when you receive the email yourself it looks like it came directly from the email address the visitor entered.

Once you have made your changes to the form properties, click the Save button at the top of the screen to apply them.

## “Personalizing” the Post Back Message

Also new to Ektron CMS400.NET is the ability to personalize the message that a visitor sees after submitting a form. To make these changes, click the Edit button to open the form in your Ektron Workarea editor, then click on the **Post back message** tab.



Here you can make the post back message display any of the text that is submitted in the form. So, as an example, you can have the message “Thank you <Full Name> for submitting the form” appear, where <Full Name> is replaced with the name the visitor submitted in the Full Name text field. All fields that you add to your form are available to embed in your post back message in this manner. Simply choose the field name from the **Insert Field** drop-down menu and a blue tag for that field will be added to your screen, as circled in the image above.

This is also a way to allow your site visitors to then print out the form information they submitted after the form has been emailed to you. Just add each of the form fields to the post back message screen and add a note at the top or bottom stating that the page can be printed if needed. There are a number of possibilities available to you with this feature.

## Miscellaneous Notes

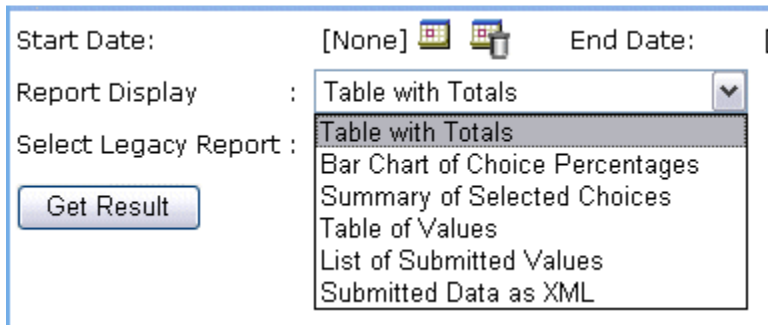
To edit a form field that you have already added to your form:

- Click once on the field you want to make changes to in order to “highlight” it.
- Click the **Field Properties** button, circled in the image below. Or, right-click the field and choose **Field Properties** from that menu.






The current version of CMS400.NET **does not** allow JavaScript code to be added to forms. This should be added to a later update, but for now any code added to a form will be removed completely when the form is published.


If your form has the **Database** option checked you can read (and export to Excel) the entries using the **Report** button found in the Ektron Workarea, in the same menu as the Edit button. You can view reports over a range of time or all submissions ever submitted by leaving the date ranges empty. You can also choose a Report Display mode:



The **Select Legacy Report** option allows you to see only submissions that were made with a certain version of your online form. For instance, if you publish your form with just three text fields in it and have five submissions sent to you, then add a fourth text field and have more submissions, you can display a report that shows **ONLY** the submissions from the first version of your form. That would leave out any submissions sent after you added the fourth text field. Each time you publish your form it is saved as a new “version” in this report menu.

Start Date: [None]   End Date:

Report Display : Table with Totals 

Select Legacy Report : UNK Form (ver.6) 

Get Result

- UNK Form (ver.6)
- UNK Form (ver.5)
- UNK Form (ver.4)
- UNK Form (ver.3)
- UNK Form (ver.2)
- UNK Form (ver.1)

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Guide Version 1.0  
for Ektron CMS400.NET version 6.1