

Creating Forms in SOCS

Use the Form option on the Advanced Tool Bar to create a form to post to your SOCS site. The form allows visitors to complete the information online. The information gathered in the form will be returned to the designated recipient in an email.

For a nominal fee, the information collected in the form can be stored to an accessible database. Create the form and contact Client Support for an estimated fee.

NOTICE:

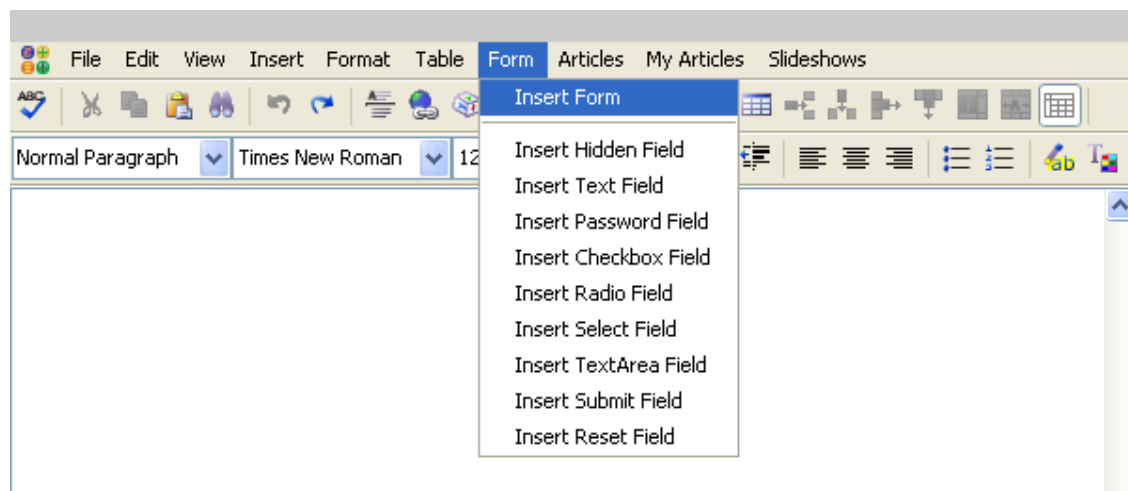
Before creating a form, please contact Client Support with the recipient email address(es) being used by the form as there is a file on the server that needs to be updated before the form can be sent.

HINTS:

- Think about the items that will be collected on the form as they will all need to have a name associated with them. The field name is used in the returned email.
- If you want to be able to track returned emails easily, make the email a required field.
- If you want to align the fields in a specific way or add background colors, first insert the form into the SOCS article, and then insert a table into the form. You can then organize the input fields in the table cells. You can also add background colors if you wish.

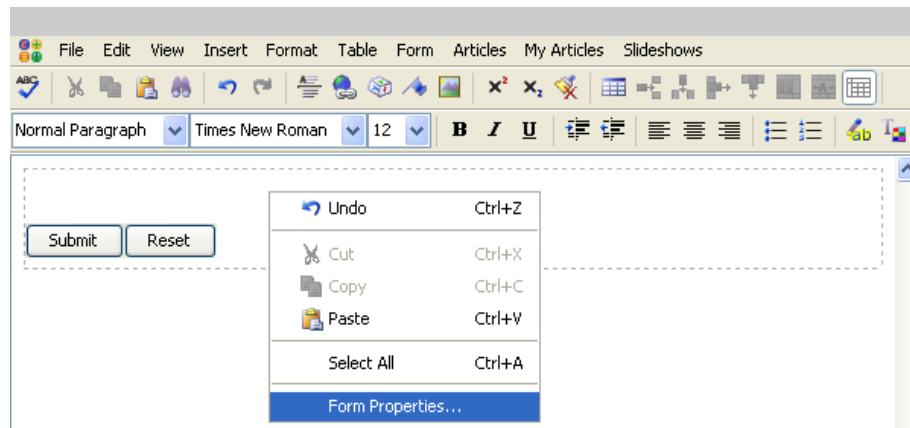
To insert a form:

Select Form/Insert Form from the toolbar in the article editor.

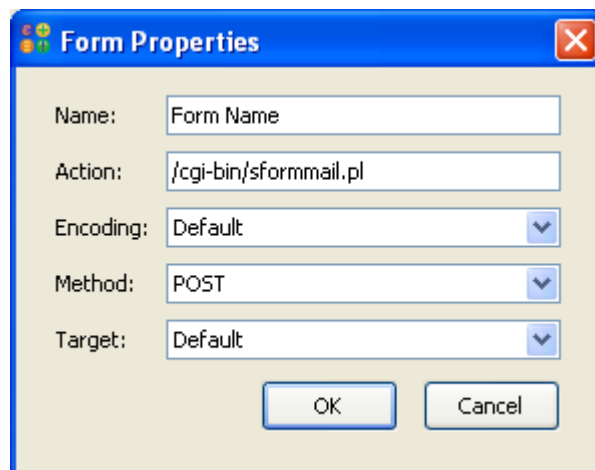


Set the Form Properties

To do this, place your cursor inside the form, right click, and select Form Properties.



Complete the Form Properties.



Name – the name of the form

Action – enter **/cgi-bin/sformmail.pl** (this information will not change – use this for all forms)

Encoding – select Default

Method – select POST

Target – select Default

Form fields

Following is a list of the fields available and a brief explanation of each. For each field you enter, you will right click inside the field, select Field Properties from the drop-down box, and fill out the appropriate information.

Hidden Fields – fields that define data about the form. The person filling out the form does not see this information. The most frequently used hidden field names are:

- Recipient – the email address(es) of the person the form data will be sent to (separate multiple email addresses by a comma and no spaces)
- Subject – the subject line of the email being sent
- Required – the fields that are required on the form (separate multiple fields by a comma and no spaces)
- Redirect – after the form is submitted, the user will see a custom “thank you” page.

Text Field – a single row box used to gather information. Examples of text fields are:

- Email address
- Name
- Address

Password Field – allows the user to select a password for another process (i.e. PowerSchool access). The password entered will appear as dots. The password chosen will be available in the returned email.

Checkbox Field – field used to gather a list of multiple options. Examples of checkbox fields are:

- Select all that apply
- Which sessions will you attend?

Radio Field – field used to gather only one option. Examples of radio fields are:

- Questions that have a yes or no answer
- Questions where multiple options are listed but you want the person to select only one of the options.

Select Field – drop-down field of multiple options. Examples of select fields are:

- What is your favorite color?
- How satisfied were you with your visit?

TextArea Field – a larger area to gather information. Examples of text area fields are:

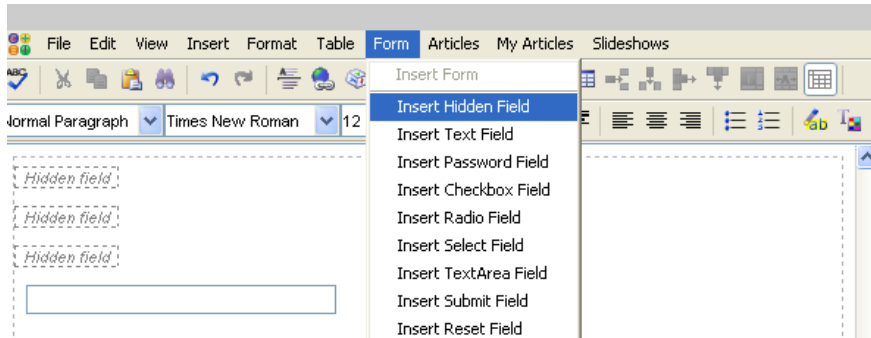
- Comments
- Dietary restrictions

Submit & Reset Fields – automatically added to the form. Submit sends the information and Reset clears the form.

Adding the form

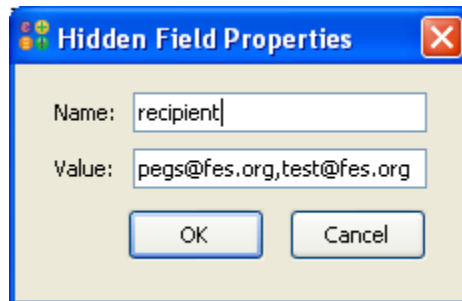
After the form has been inserted, begin adding the form elements. Place your cursor inside the form outline where you would like the element placed.

Choose Insert Hidden Field from the Form drop-down menu.

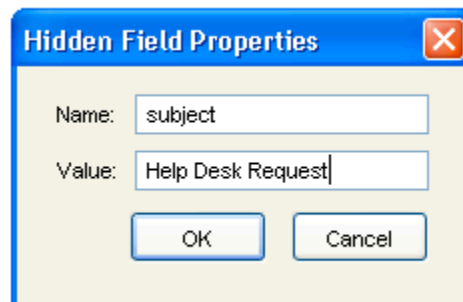


A *Hidden Field* is inserted into the form. Right click inside the appropriate *Hidden Field* and select Form Field Properties from the menu. Enter the Name of the hidden field.

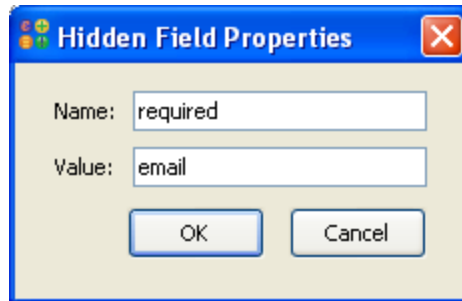
Recipient: The hidden field is the email addresses that receive the completed form information. Enter the name as **recipient**. The value is the email address(es) the form will be sent to.



Subject: To specify what you want to appear in the subject line of the return email, create a hidden field and enter the name as **subject**. Enter the email subject line i.e. Help Desk Request as the value. If you do not add a subject field the subject line in the return email will read WWW Form Submission.

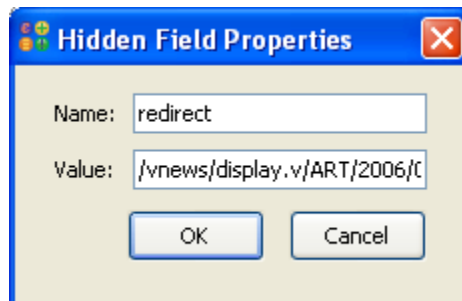


Required: To specify which fields in the form are required, enter **required** as the Name and the field name(s) as the Value (name, address, email, etc.). The names you add in the Value field must match the specified field names exactly.



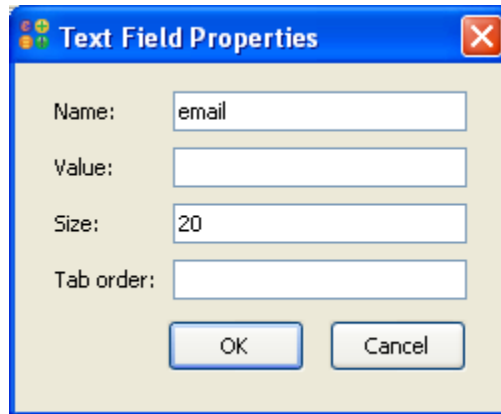
Note: If you want to be able to track returned emails easily, make the email a required field.

Redirect: To redirect to a custom “Thank You” page, create the article in SOCS and use the hidden field to redirect to that article. To do this, the Name must be “**redirect**” and the Value will be the SOCS article id (/vnews/display.v/ART/2006/05/09/379b30813). If you do not create a custom thank you page the user will still see a generic page thanking them for using the form.



Choose Insert Text Field from the Form drop-down menu.

A text field is inserted into the form. Right click inside the Text field and select Form Field Properties from the menu.



Name – the name is used to identify each field. Each field in a form must have a unique Name. Use a name that represents the data being collected – name, address, phone, etc.

Tip: Always use **email** (all lower case) for the Name when gathering the email address. This adds the email address to the “from” area of the return email. If you do not use **email** as the name the “from” address will be blank or Bounce@lists.fes.org on the email you receive.

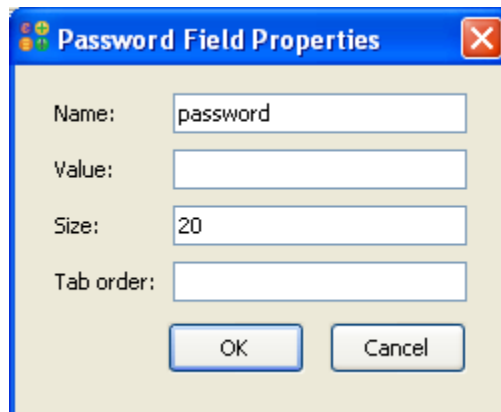
Value – not used for Text fields.

Size – indicates how many characters wide the displayed text box will be. Size **does not** determine how many characters can be entered.

Tab Order – the order which the fields appear on the form (1 for first, 2 for second, etc.).

Choose Insert Password Field from the Form drop down menu.

A password field is inserted into the form. Right click inside the password field and select Form Field Properties from the menu.



Name – always enter a password.

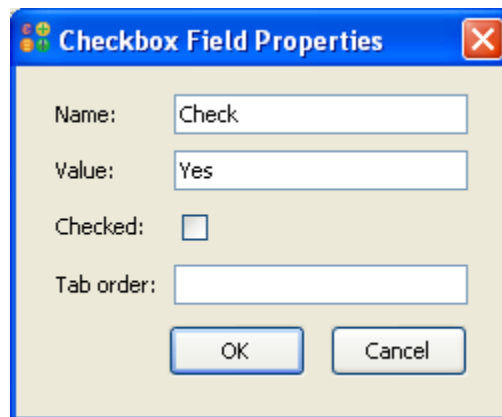
Value – not used for password fields.

Size – indicates how many characters wide the displayed password box will be. Size **does not** determine how many characters can be entered.

Tab Order – the order which the fields appear in the form (1 for first, 2 for second, etc.).

Choose Insert Checkbox Field from the Form drop-down menu.

A checkbox field is inserted into the form. Right click inside the checkbox field and select Form Field Properties from the menu.



Name – the name used to identify each field. Enter the same name for each checkbox field in this category.

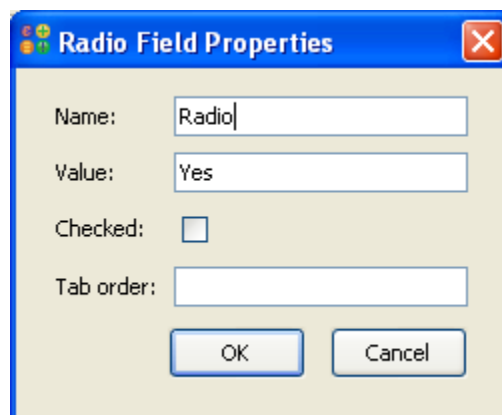
Value – the value of each checkbox name (i.e. Yes, No, Maybe).

Checked – used to pre-select one of the checkbox fields

Tab Order – the order which the fields appear in the form (1 for first, 2 for second, etc.).

Choose Insert Radio Field from the Form drop down menu.

A radio field is inserted into the form. Right click inside the radio field and select Form Field Properties from the menu.



Name – the name used to identify each field. Enter the same name for each radio field in this category.

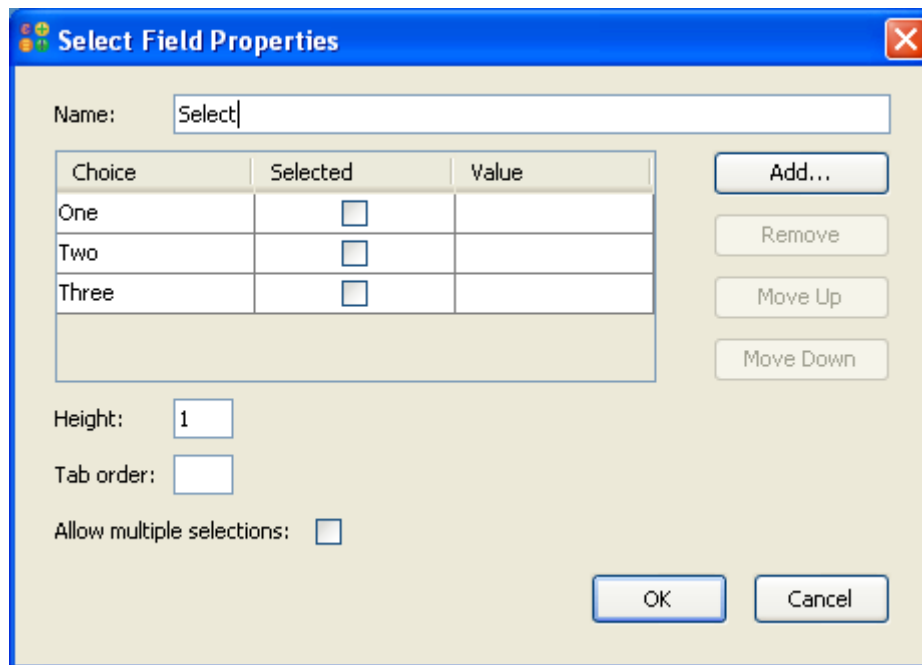
Value – the value of each radio name (i.e. Yes, No, Maybe).

Checked – used to pre-select one of the radio fields

Tab Order – the order which the fields appear in the form (1 for first, 2 for second, etc.).

Choose Insert Select Field from the Form drop-down menu.

A select field is inserted into the form. Right click inside the select field and select Form Field Properties from the menu.



Name – the name used to identify each field.

Choice – the name of each choice for your field. Select Add, Remove, Move Up or Move Down to customize the choices.

Selected – used to pre-select one of the select fields.

Value – can be left blank.

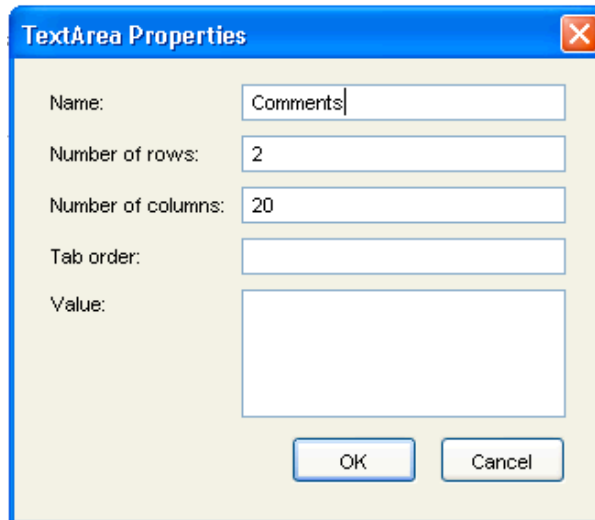
Height – determines how many options are shown in the menu at one time. Size 1 turns the menu into a drop-down list. Size 3 would display a box with three options.

Tab Order – the order which the fields appear in the form (1 for first, 2 for second, etc.).

Allow Multiple Selections – used to mark more than one option.

Choose “Insert TextArea Field” from the Form drop-down menu.

A TextArea field is inserted into the form. Right click inside the TextArea field and select Form Field Properties from the menu.



Name – the name used to identify each field ie. Comments

Number of Rows – the number of rows to be displayed on the screen. The number of rows does not limit the amount of text that can be entered, only how tall the TextArea is (scroll bars will appear when necessary).

Number of Columns – the number of columns for the text area. This is equivalent to how wide the text field will be.

Tab Order – the order which the fields appear in the form (1 for first, 2 for second, etc.).

Value – enter data to display in the TextArea or leave blank.

REMEMBER:

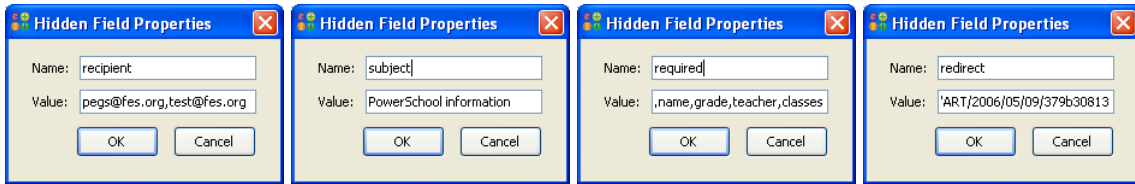
The form will not work until you contact Client Support and give them the recipient email address(es) being used by the form. There is a file on the server that needs to be updated before the form can be sent.

Example Form

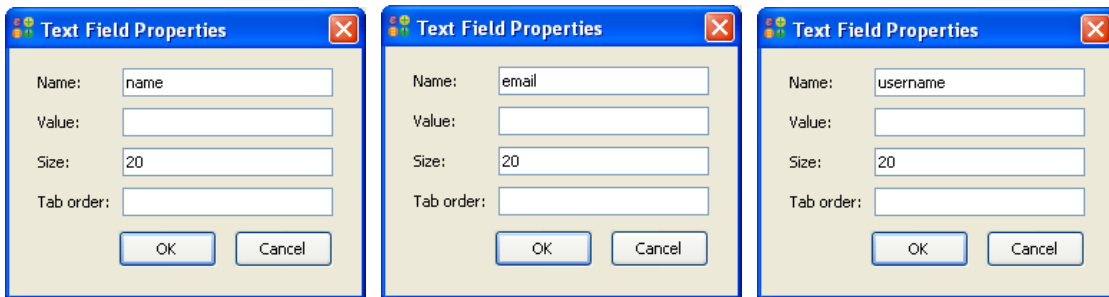
Try this sample to create a form to gather name, email address, username, password, classes for child, grade of child, teacher of child, and comments.

- Create an expired “Thank You” article on your site. Search for the article from your home page and copy the url (the website address information following your main address - /vnews/display.v...)
- Create a new article to gather PowerSchool password information for parents/students.
- In the article editor, select Form, Insert Form.

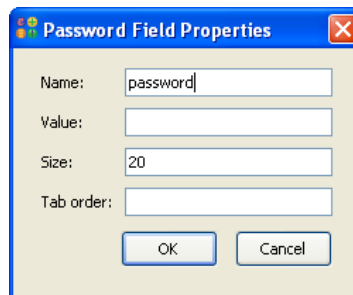
- Add four hidden fields for recipient, subject, required, and redirect.



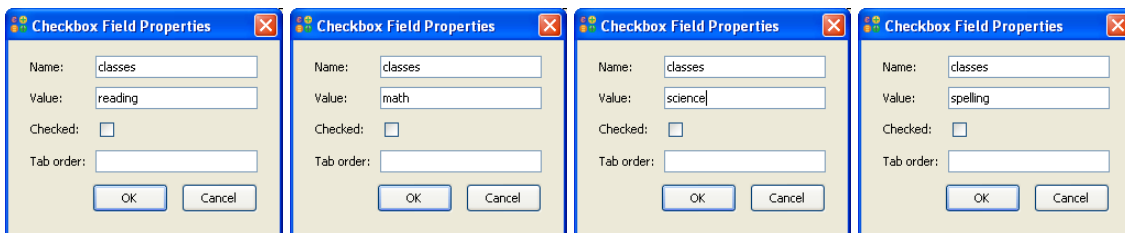
- Add text fields for name, email, and username. Add the labels for the text boxes before inserting the Text field.



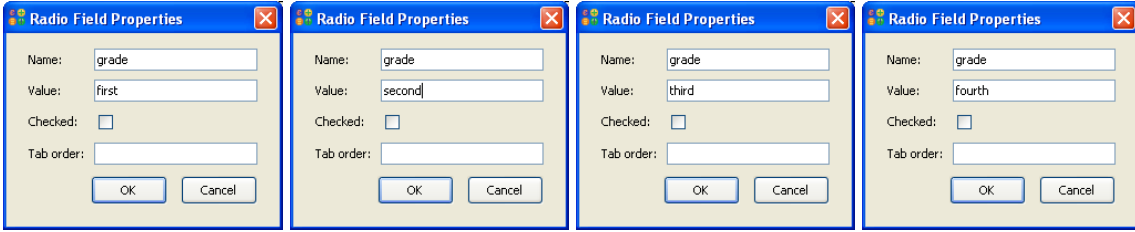
- Add a password field. Add the label for the password field before inserting the password field.



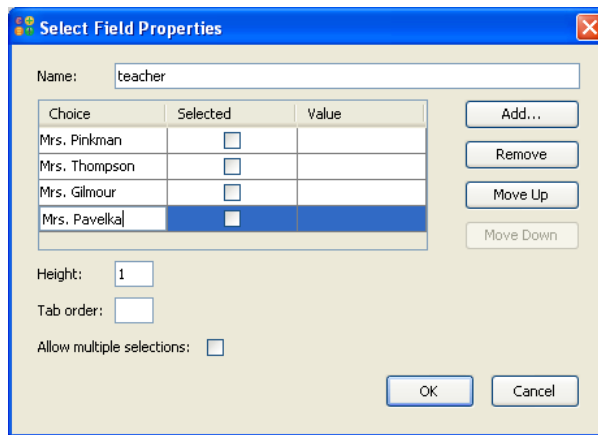
- Add checkbox fields for classes of reading, math, science, and spelling. Add the label for the checkbox fields before inserting the fields.



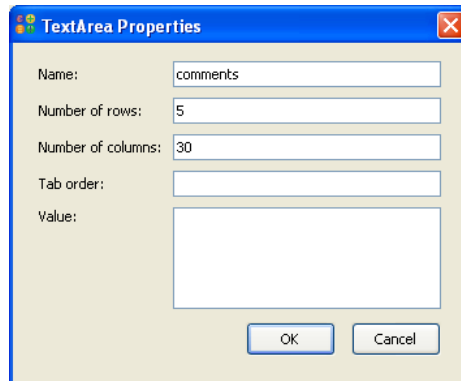
- Add radio fields for grade of first, second, third, and fourth. Add the label for the radio fields before inserting the fields.



- Add a select field for teacher of Mrs. Pinkman, Mrs. Thompson, Mrs. Gilmour, and Mrs. Pavelka. Add the label for the select field before inserting the field.



- Add a Textarea field for comments. Add the label for the Textarea field before inserting the field.



Your sample form will appear like this on your site:

Name

Email address

Username

Password

Classes
Reading Math Science Spelling

Grade of child
First Second Third Fourth

Teacher

Comments