Web Development Services
Form Collector 2.0

This document covers the features of the Form Collector application.

SUNGARD HIGHER EDUCATION

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OVERVIEW

Form Collector is used to gather information from any form on your installation of SBT. It uses a combination of hidden fields to perform certain functions which will be set by the webmaster/person that creates the form.

CREATING FORMS

You may create forms in your editor of choice or by hand if you would like. The preferred way would be to use an editor such as Dreamweaver for this because you can get the look and feel of your form just right. After this is created we will be looking at the source code and mofying some of the values.

CUSTOMIZING FORMS

REQUIRED FIELDS

Open your form in source view. Find the FORM tag. This tag has an element called ACTION. If you do not see this element in your tag you will need to add it. Your form tag should look exactly like this (you can copy and paste this to your form if you would like):

```
<form method="post" action="/custom/formcollector/post.asp" enctype="multipart/form-data" name="frmForm">
```

This has changed from previous Form Collector versions! Make sure that `enctype="multipart/form-data"` is in your form tag.

Setting the action element to this value means that the form will be submitted to the Form Collector application. When the form is submitted there are three required fields that must accompany it - the **FormName** field, the **Category** field, and the **Redirect** field. You should include these as hidden fields and be placed just after the form tag. The Form Name field is how the form will be identified in the Form Collector application. This should be a short descriptitive title about what your form is used for. The Category field is used to group multiple forms together. You should use a very general one or two word name for this field. To see a list of pre-existing Category's, open the Form Collector application and pull down the box on the Form Directory page. All of the options in this box are categories that already exist. Figure 1 shows the screen where you will see the list of categories.

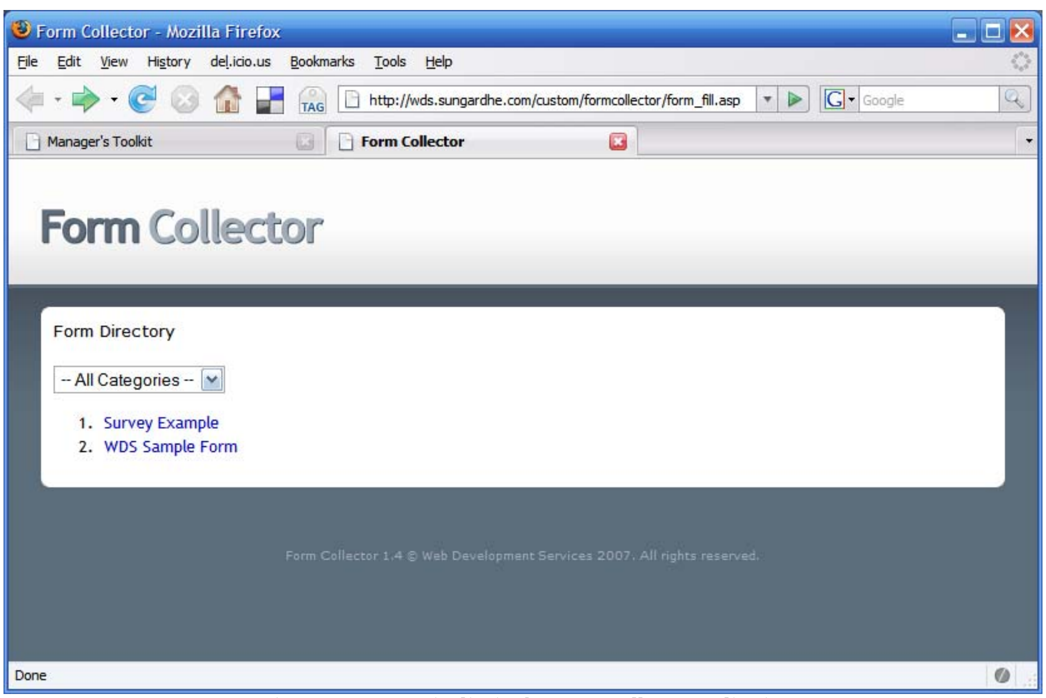


Figure 1 – Categories list in the Form Collector application.

The third required field is the Redirect field. The value for this is an address of a webpage that you want to send the user to after they have submitted the form.

OPTIONAL FIELDS

There are optional fields that you can include which will perform special functions. These are the **OutputFields, Email, RequiredFields, FieldOrder, and ExportFields** fields.

The **OutputFields** field is a comma delimited string of field names that are defined within your form. In Figure 1 this is set to "PersonName, PersonEmail". If you look at our form you will see two text input fields named PersonName and PersonEmail. You should only include fields that will be used in a page that you are redirecting to (such as a “Thank You” page for example).

The **Email** field is used to send someone an email when the form is submitted. Enter the person’s email address as the value. You should not use a field name of “Email” in your form when promting the user for their email address. Try using “User Email” or “Email Address” instead.

The EmailFrom field specified the “From” address when sending emails. This can be someone email address or can be another field name in your form that the user fills out. This way when they submit a form it looks like the email came directly from them. If the field they filled out was called “PersonName” then the EmailFrom field would look like this:

```
<input type="hidden" name="EmailFrom" value="PersonEmail">
```

The **RequiredFields** field is used to make sure that a particular form item is filled out by the user before they are allowed to submit a form. There is an additional snippet of code (provided below) you will have to paste into your form in order to display to the user which fields they need to correct. You can control how the error message looks by creating a style for “#MissingFields”.

The **FieldOrder** field is used to order the information that is submitted with the form. If this field is not included the fields will be ordered alphabetically. If it is included but does not include all of the field names then the fields specified will be ordered first with the remaining fields second ordered alphabetically.

The **ExportFields** field is used to customize which fields you want included in the csv file that is available for download. The data will be exported in the order in which you specify the field names. This data can be opened by Microsoft Excel or any similar spreadsheet application.

Additionally you should name your submit button “Submit” which is a keyword that will be separated from the form data. This also goes for a reset button named “Reset”.

Quick tip!
Name your fields so that they are easily understandable. Here is an example:

Instead of:
```
<input type="checkbox" name="question1" value="1a">Apples
<input type="checkbox" name="question1" value="1b">Oranges
```

Use:
```
<input type="checkbox" name="Which fruits do you like?" value="Apples">Apples
<input type="checkbox" name="Which fruits do you like?" value="Oranges">Oranges
```

CATCHING SPAM

In order to keep spam bots from submitting data to your form there is a simple technique to use. Place a textbox in your form and name it “SpamCatcher”. Set the class for the textbox to “SpamCatcher” too. In the CSS for your site add a style definition for .SpamCatcher and set the display to none. This way a spam bot will see that there is a textbox to fill out but users on your site will not see it. Since spam bots try to inject their messages into every available textbox there should be a value for this field when they submit it. A real user will submit the form and this field will not have a value. This is how we determine if the data is real or not. Here is a sample of what the code should look like:

HTML Code:
```
<input type="text" name="SpamCatcher" class="SpamCatcher" />
```

CSS Code:
```
.SpamCatcher {
     display: none;
}
```

SAMPLE CODE

Here is a block of code with all of the available fields. Copy & paste what you need and change the field values:

```
<input type="hidden" name="FormName" value="FC Newsletter Example" />
<input type="hidden" name="Category" value="Examples" />
<input type="hidden" name="Redirect" value="/pages/1.asp" />
<input type="hidden" name="OutputFields" value="PersonName, PersonEmail" />
<input type="hidden" name="FieldOrder" value="PersonName, PersonEmail" />
<input type="hidden" name="RequiredFields" value="PersonName, PersonEmail" />
<input type="hidden" name="Email" value="you@domain.edu" />
<input type="hidden" name="ShowSummary" value="yes" />
<input type="hidden" name="ExcludeFromSummary" value="Name" />
<input type="hidden" name="ExportFields" value="PersonName, PersonEmail" />
```

Once your form is ready, create a page in SBT with an appropriate name and within the appropriate hierarchy. Instead of typing in the editor window, click on the “Source” button and copy & paste your form code into this window. Now Save and Publish your new form.

For the missing fields error message: Create a new Snipplet and paste this code into it. Once you save it, copy the `<!--...-->` comment from the bottom of the page and paste it into your source code where the message should be displayed:

```
<span id="MissingFields" style="<%If Request("MissingFields")="" Then%>display:none;<%End
If%>">Please complete the missing fields: <%=Request("MissingFields")%>.</span>
```

CREATING THANK YOU PAGES

In SBT create a new SNIPPLET content block. Name it something close to the name of your form (for example – “FC Newsletter Example – Thank You!”) In this snipplet, write out your entire thank you message. In place of the person’s name (or other value) you should use this piece of code:

```
<%=Request("PersonName")%>
```

PersonName can be replaced with any field name you listed in the OutputFields option. Figure 2 shows our snipplet.

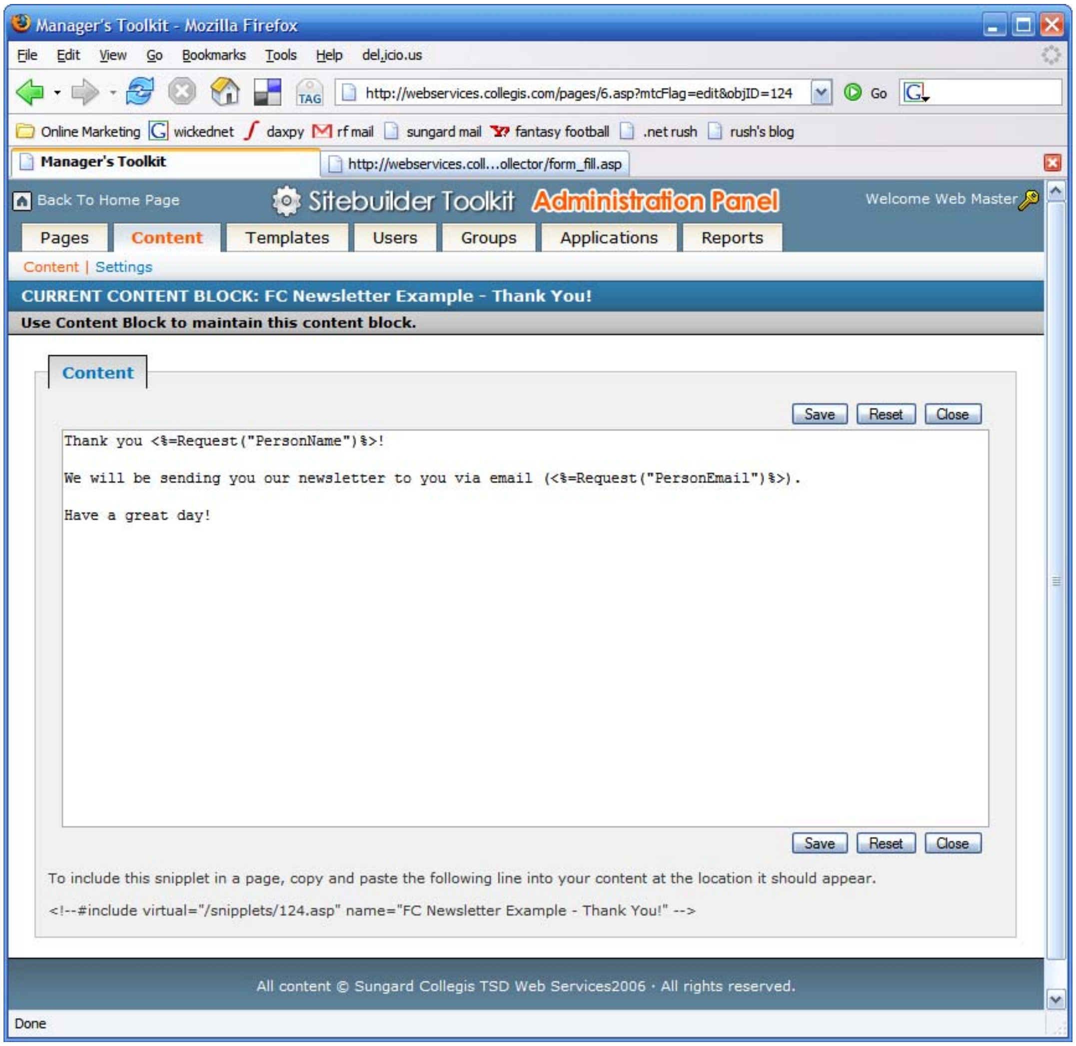


Figure 2 – Thank you page snipplet.

At the bottom of the content snipplet you will see a line of code that starts with <!--#include virtual… Copy this entire line. Now switch to the pages tab in SBT. Create a new page in the appropriate place with a name similar to what you named the content snipplet. Instead of writing something in the editor window, click on the "Source" button and paste the line of code we copied from the snipplet. You will not see any updates to your page when in the toolkit but it is linked in the background. Save and publish your page. You may want to set this page to hidden so that people browsing your site cannot get to it other than by filling out your form.

CREATING THANK YOU EMAILS

These are the fields associated with creating a Thank You Email.

```
<input type="hidden" name="SendThankYouEmail" value="true" />
<input type="hidden" name="ThankYouEmailToField" value="PersonEmail" />
<input type="hidden" name="ThankYouUrl" value="http://wds.sungardhe.com/pages/175.asp" />
<input type="hidden" name="ThankYouCache" value="true" />
<input type="hidden" name="ThankYouEmailSubject" value="WDS got your submission!" />
<input type="hidden" name="ThankYouEmailFrom" value="name@domain.com" />
<input type="hidden" name="ThankYouUrlOutputFields" value="PersonName" />
```

Explaination of what each field means:

- **`SendThankYouEmail`** – If set to "true" will turn on thank you emails. Setting this to "false" will turn them off.
- **`ThankYouEmailToField`** – This is the name of a field in your form that the user inputs their email address into.
- **`ThankYouUrl`** – URL of the web page that will be emailed to the user. This must be a full URL not relative.

- **`ThankYouCache`** – If set to "true" will cache the web page that is being emailed for one hour. This will increase the performance of the email feature. **You must set this to "false" if your ThankYouUrl (script) is passed any parameters through the ThankYouUrlOutputFields field.** Otherwise setting this to "true" will cause someone elsing cached information to be sent in the email.
- **`ThankYouEmailSubject`** – The text that will appear as the Subject of your email.
- **`ThankYouEmailFrom`** – The address that will appear as the From address of your email.
- **`ThankYouUrlOutputFields`** – A comma delimited string of field values that will be passed in the query string to the URL specified in the ThankYouUrl field.

USING THE FORM COLLECTOR APPLICATION

In SBT click on the Applications tab. In this list you should see "Form Collector". Click on this link and the application will open in a new window. (You may have to turn your popup blocker off). **You must have Manager access to be able to open the FormCollector.** If you do not have access, contact your webmaster who will be able to grant you access.

The Form Directory page lists all forms that have been submitted. If at first you do not see your form that is because no one has completed it yet. You can filter this list by choosing a category from the listbox at the top. Figure 3 shows what the screen should look like.

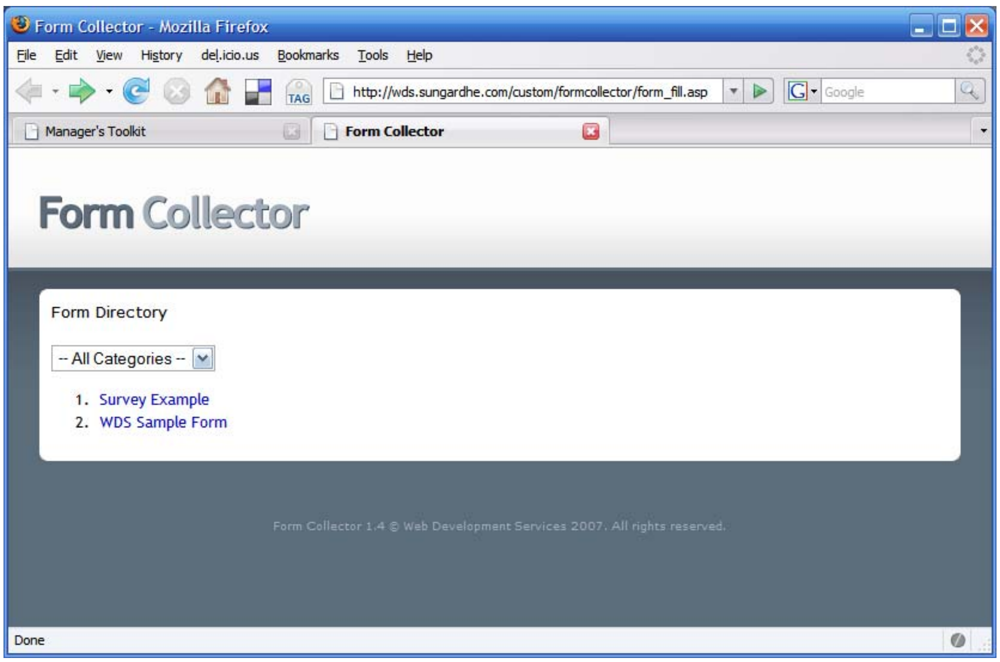


Figure 3 – Form directory page.

Clicking on the name of your form will take you to the Form Details page shown below in Figure 4.

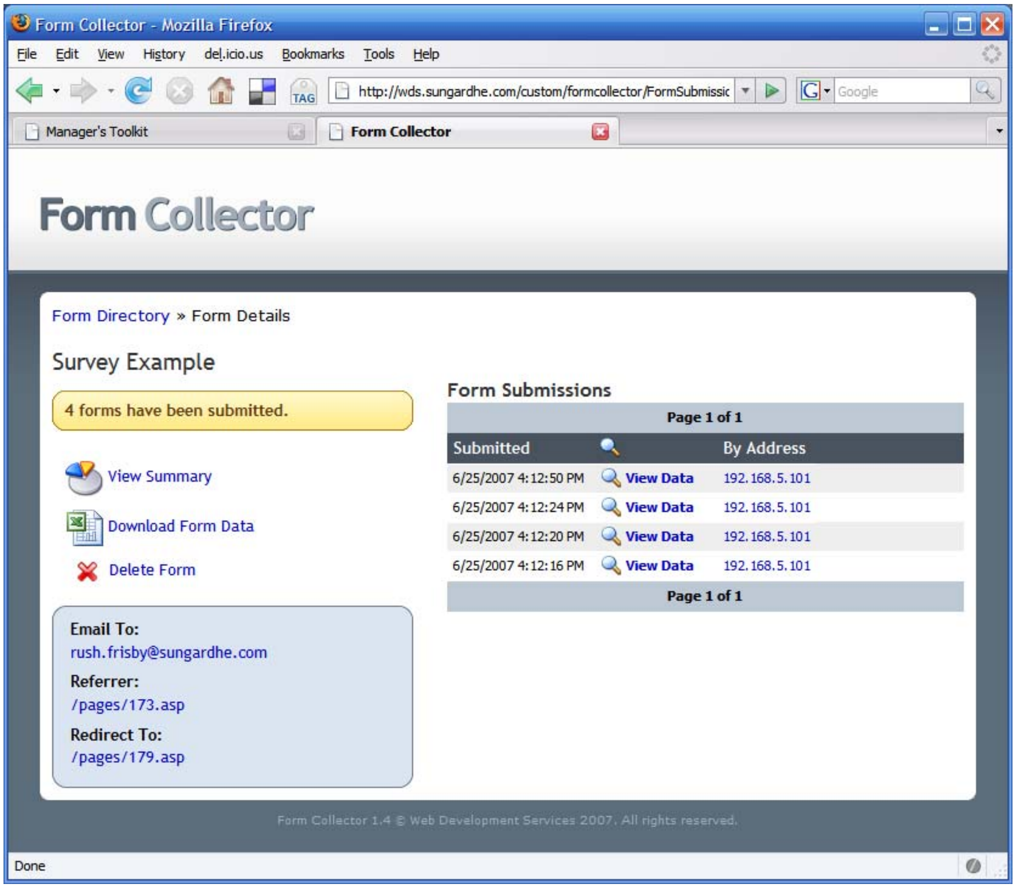


Figure 4 – Form details page.

At the top of any page you can use the breadcrumb trail to go back to any of the previous pages.

On the Form Details page you will be able to see where the form redirects to and who is emailed when the form is submitted. On the left hand side there is a link to download all of the form data that has been submitted. This file is a spreadsheet that you can load into Microsoft Excel or similar spreadsheet program. Below this is a link to delete the form and all of the data that has been submitted. **It is recommended to never delete a form unless absolutely nessessary.** To the right is a table which lists all of the form submissions. This includes the date & time the form was submitted, a link to view what the user input/selected, and the IP address of the person who filled out the form. If you click on the View Data link it will take you to a page that looks like Figure 5.

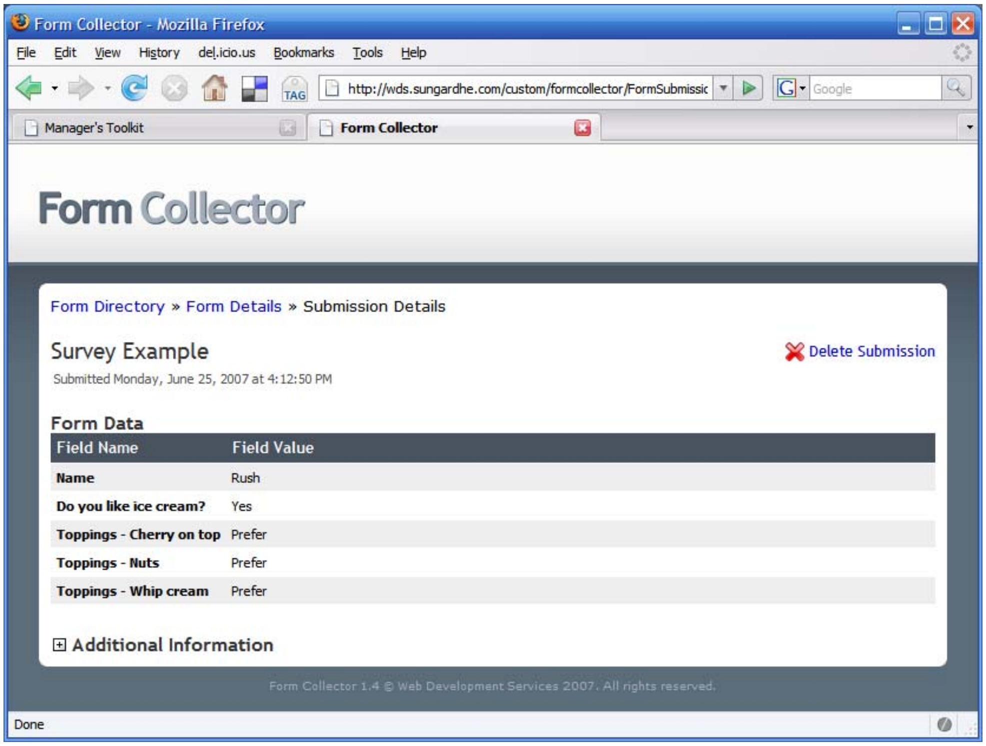


Figure 5 – Submission details page.

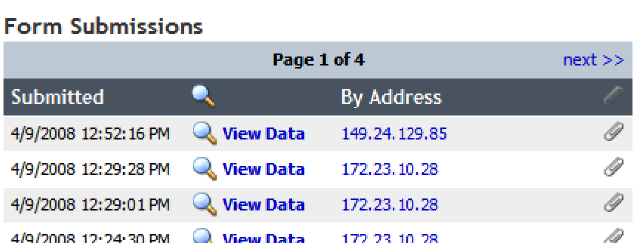
The submission details page will list all information associated with the submission. The form name and time of submission are displayed first followed by all of the form data. On the top right side of the page is a link which will delete the submission. Again, **using the delete feature is not recommended.** At the bottom of the page is additional information that was submitted with the form, normally these are the hidden fields and user information such as IP Address**.**

UPLOADING FILES

Form collector supports the uploading of multiple files. To do this you just need to include one or more HTML file input tags in your form. The HTML for a file input tag looks like this:

```
<input type="file" name="Attachment1" />
```

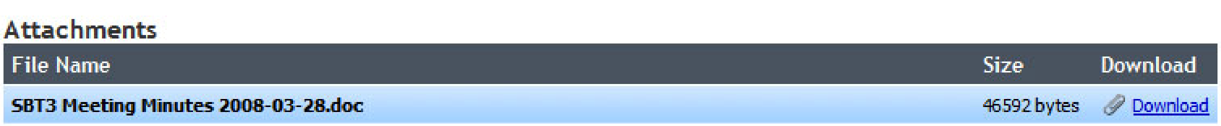
When the form is submitted the files will be attached to the submission and downloadable through the Form Collector administration panel. Submissions with attachments will have a paperclip icon next to them, like this:



Form Submissions

Page 1 of 4		next >>	
Submitted		By Address	
4/9/2008 12:52:16 PM	View Data	149.24.129.85	
4/9/2008 12:29:28 PM	View Data	172.23.10.28	
4/9/2008 12:29:01 PM	View Data	172.23.10.28	
4/9/2008 12:24:30 PM	View Data	172.23.10.28	

By clicking on "View Data" you can see the information submitted with the form followed by a list of attached files. Click the "download" link to download the file.



Attachments

File Name	Size	Download
SBT3 Meeting Minutes 2008-03-28.doc	46592 bytes	Download

You will only be able to download files while logged into SBT and having access to Form Collector. You cannot pass the link to someone else so that they can download the file.

Certain types of files are not allowed to be uploaded because they have the potential to be used inappropriately by a user. These types of files are: .exe, .asp, .php, .aspx, .ashx, .cfm, .cmd, .vbs, .bat, .bas, .class, .com, .cpl, .crt, .hta, .ins, .isp, .jse, .lnk, .msc, .msi, .msp, .reg, .scf, .scr, .sct, .shb, .shs, .url, .vb, .cs, .vbe, .wsc, .wsf, .wsh, .asa, .asax, .config, .ini, .sitemap, .xsd, .dll, .ascx, .skin, .master, and .sql.

ADDING A SUMMARY REPORT

Adding a summary report is useful for surveys and other forms where you would like to see statistics on which options were selected. To add a summary report to a form, include this hidden field to your form:

```
<input type="hidden" name="ShowSummary" value="yes" />
```

Additionally you can include this field which excludes the specified fields from showing in the report. It is generally a good idea to exclude textbox fields since the result will almost never be the same and statistics for this field would be useless. Include this hidden field in your form changing out the value with the fields in your form you wish to exclude:

```
<input type="hidden" name="ExcludeFromSummary" value="PersonName,PersonEmail" />
```

To view a report go into the Form Collector administration panel and click on the report name. You will see a link to view the summary on the right hand side of the page next to a pie chart icon. Figure 6 shows a sample summary report.

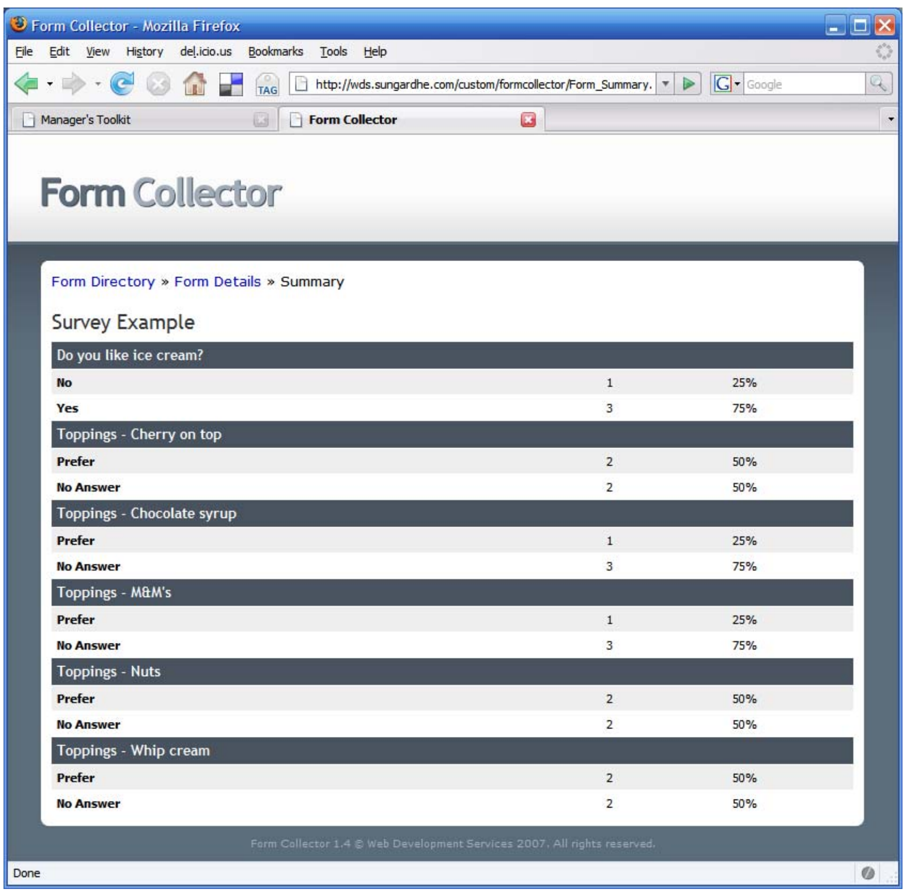
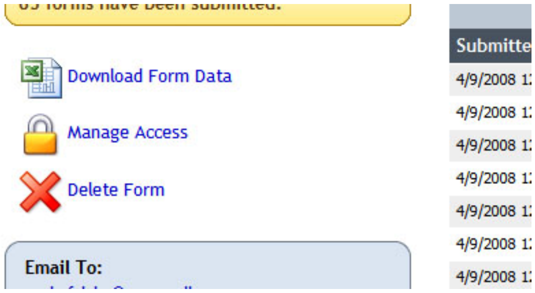


Figure 6 – Form Summary Report

ACCESS CONTROL

By default Webmasters in SBT have full access to Form Collector. To grant someone other than a webmaster full control to Form Collector you must give them "Manage" access to the Form Collector application. Giving someone full control means they will see every form and can control access themselves as well.

To give someone access to a specific form you must first give them "Read/Execute" access to the Form Collector application. After you do this go into Form Collector and click on the form name. You will see a lock icon that says "Manage Access"



This will take you to a screen where you can select Groups or Users from SBT access to view the form. Move them from the listbox on the right to the listbox on the left by selecting their name and using the arrow buttons.