Overview
Form Assets can be used to place interactive web forms on a site in OU Campus. Site visitors can use the web form to submit data to site owners. Form submissions can also be used to trigger emails that can send some or all of the form data to multiple recipients.

A Poll Asset is a specialized Form Asset that allows site visitors to vote for an answer to a question as well as see the current vote tally live.

Limitations
Uploading and/or transmitting files, as well as accepting payments, are not options available using the Form Asset. Additionally, there are serious restrictions on how certain kinds of information can be collected via Form Assets. If you need to collect personally identifying data (Social Security Number, birth date, etc), please contact Web Services (webservices@sjsu.edu) to request assistance in creating a secure form to transmit this sensitive data.

For further details about identifying and handling sensitive personal information, visit the Information Security site at http://its.sjsu.edu/services/info-security.

Who This Manual Is For
These instructions are written for content contributors and editors who may not otherwise have experience or familiarity with standard web design practices. Concepts are introduced using conversational language, with an emphasis on identifying only the necessary steps to accomplish tasks.

Community members looking for more technical instructions can visit the OmniUpdate Support site at http://support.omniupdate.com.
Step 1: Where to start

1a) Navigate to the Assets page in OU Campus.

1b) Click on the +NEW button and select “Managed Form” from the available assets. (A Poll is a specialized type of Form and the procedure is the same for Polls)

Heads-up!
Form Assets are locked to a specific site. Be sure that you are logged into the correct site before creating your asset.
Step 2: Configuring your Form Asset

Naming Your Asset
- Prefix the asset name with the name of your site for easy searching
- Using simpler, friendly names will help users select the appropriate asset
- If you’re going to have a lot of assets, plan ahead and develop detailed naming conventions

Description
A description helps future content editors know what kind of photos should be contained in the gallery.

Lock to site
Gallery assets are automatically locked to the site they are created in. That means that galleries created on a particular site will not be available to add to pages on other sites, in contrast with plain content assets that can be optionally locked to a site.

Tags
Descriptive tags help make finding the asset later easier and faster. A good convention is to include your site name as a tag.
Form Settings
When a user finishes filling out the form and clicks the Submit button, they will either get a Success Message or a Failure Message depending on if they filled out everything correctly. Those messages are entered here.

Success Message
A simple message with a thank you is sufficient and effective. Something like “Thank you for signing up for our newsletter.”

Failure Message
Depending on how individual form elements are configured, there can be multiple ways for a user’s submission to fail. Each individual form element that has specific rules attached to it about what is or isn’t a valid entry will display its own error message. A generic failure message is added to notify the user that there is a problem with their entry.

Friendly, simple and natural language is similarly effective here: “We’re sorry! There seems to be a problem with your submission. Can you please review your entries and try again?”

Save Results in Database
Leave this checked. Otherwise, form submission results won’t be saved and the data the user submits will only be available via the email that gets generated in the next step.

Heads-up!
After you’ve selected the size you want, be sure to click the “Set Size” button to lock in and save your choice.
Email Messages
When a user submits a form, the data they share can be emailed to one or more people. It is also possible to send multiple messages, each containing different information tailored to the email recipient.

Multiple Recipients
More than one recipient can be added to the message by separating each with a semicolon (;).

From
The email actually gets processed and sent by OU Campus, but adding a From address will make the message appear as if it was sent by a particular person or account.

Body
Data that was entered by the user can be sent via email by adding it to the Body section of the message. To include the results of the form, use the Name of an element surrounded by double curly braces (elements and their names are covered in the next section, Adding Form Elements).

Sample Message
Someone has RSVP’d to your event.
Here is their information:

First Name: {{firstname}}
Last Name: {{lastname}}
Email Address: {{email}}
Adding Form Elements
The different fields and options that users fill out on a form are called *Elements*. The usable elements include:

**Single-Line Text Fields**
Single-line text fields are the most commonly found form elements. They are designed for small amounts of data, like an individual name or account number.

**Multi-Line Text Fields**
Multi-line text fields are for users to provide large amounts of information, like a feedback comment or a technical support issue.

**Radio Buttons**
Radio buttons give users the ability to choose a single item from a list of items (or none, if there is no item chosen by default).

**Checkboxes**
Checkboxes allow for multiple items, or no items, to be chosen from a list.

**Drop-down Menus**
Drop-down menus are similar in functionality to radio buttons (allowing only a single option to be chosen), but are more appropriate for longer lists of choices, like choosing a state or a country while entering in an address.

**Multi-select Menus**
Multi-select menus are to checkboxes what drop-down menus are to radio buttons: A longer list of options presented with a scrollbar.
Form Element Attributes
Each form element has multiple attributes that need to be configured. Some attributes are common to all elements, some attributes are unique to specific elements.

Name
The *Name* of the element is the attribute that gets used in the *Body* of the email message. The name is determined automatically by the text from the *Label* field. They are limited to 32 characters.

Type
Displays the type of the element that is selected.

Label
This is the text that describes what kind of data the user should enter into the form field. Descriptive labels are very important to making sure that the form is understandable. The text used in the *Label* field is also used to populate the *Name* of the element. Once the element is ‘named’ and the asset first published, the *Label* can then be changed to something longer and clearer if desired.

Required
*Single-line text fields* and *multi-line text fields* can be made *Required*. If a user doesn’t enter in data in a required field and submits the form, an error message will appear calling attention to the empty field.

Heads-up!
Marking a field as *Required* doesn’t give any indication to the user that the field is mandatory, which can cause confusion and frustration. The recommended practice is to add “(Required)” to the *Label* attribute.
**Advanced**

Special attributes can be declared in the *Advanced* field to control how some of the form fields look or even whether they’re contained in fieldset groupings. The available options are detailed and explained at [http://support.omniupdate.com/oucampus9/content/assets-ldp/advanced-field.html](http://support.omniupdate.com/oucampus9/content/assets-ldp/advanced-field.html).

**Preview**

*Drop-down* and *multi-select* elements have a special option to preview what they will look like on the published form.

**Default**

Default text for *single-line* or *multi-line* text elements appear as example text inside of the field itself, giving additional instruction and context to help the user understand the purpose of a particular form field.

For elements with optional items, clicking on the radio button or checkbox will make that item selected by default.

**Validation**

There may be some instances where you want the user data to conform to certain restrictions: the text has to be a valid email address, a numeric field must have a minimum number of digits, etc. The *Validation* field defines the rules that govern the restrictions.

When used, a validation message needs to be added that gets displayed to the user if their data doesn’t meet the validation requirements.
Types of Validation

- **Email** — This validates the text to ensure the @-symbol was included.

  Heads-up!
  Email validation might be stricter than you intend. Currently it does **NOT** consider capital letters to be valid in an email address. If you want email validation, use the following code in Regex validation instead:

  \[a-zA-Z0-9._%-+\]*@[a-zA-Z0-9.-]+\.[a-zA-Z]{2,4}

- **Minimum Length** — This allows a number to be input to ensure that a minimum number of characters are included.
- **Regex** — Regex stands for “regular expression.” It is a very powerful way of controlling text output, but requires exacting syntax to be effective.

New Option/Checkbox/Radio Button
Click the button to add items to the list. These items have additional controls used to sort them.

- **Green Arrows** - Moves individual items up or down in order
- **Red Circle** - The red circle with the white line through it deletes an item.
**Sorting Elements**

To change the order of elements, click on the left hand side of the element’s box (the one with the five little stacked bars) and drag the element into its new position.

![Sorting Elements](image1)

**Deleting Elements**

To delete an element, click on the small grey trash can icon in the top right of the element’s box.

![Deleting Elements](image2)

**Finishing the Form**

After adding all the form elements you want to use, make sure that you include the appropriate element *Names* in the email message(s) that you will be sending. Click the Save button at the bottom of the window to save the entire form.

In order to view the form on your live website, you have to both:

1. Publish the form itself
2. Add the form to a page and then publish the page

Remember to check in the form when you are done so that other team members can check it back out.
Viewing Form Submissions
Data submitted through a form will get sent to the recipient email addresses, but it is also possible to view all of the form submissions at once. The accumulated data can also be downloaded as a CSV file.

To view form submissions, open up the Form Configuration screen and click on the small text link in the upper-right hand corner of the window.
Creating a Poll
Creating a poll is straightforward, but requires following a specific series of steps:

1. Create a regular form asset following earlier instructions
2. Add a **single radio button** form element
3. Enter the text: `options` (lowercase, no spaces or punctuation) into the **Label** field.
4. Enter the text: `type=poll;` (lowercase, no spaces, including the semicolon) into the **Advanced** field.
5. Add as many poll options as you like
6. Save the form asset
7. Publish the form asset
8. Re-open the asset and change the **Label** attribute to something that best suits your poll
9. Add the asset to a page like a regular plain content asset