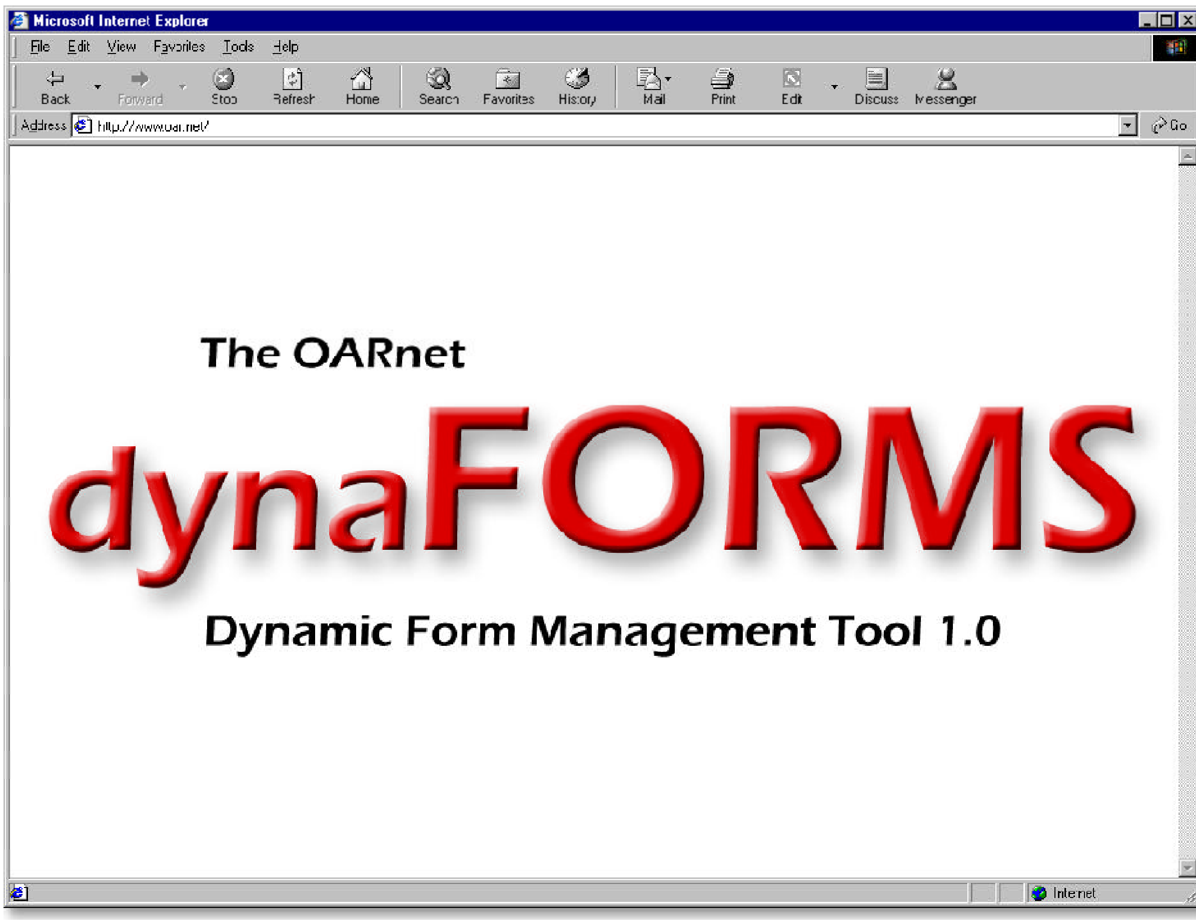


User Guide with Step-by-Step Instructions

Table of Contents

OARnet dynaForms Dynamic Form Management Tool 1.0

User Guide

Introduction

The dynaForms tool provides fully customizable options for creating forms dynamically. Unlike spending large amounts of time in HTML (Hyper-Text Markup Language) creating clunky, static forms with little or no validation, dynaForms is a quick, easy way to create intricate, intuitive forms with thorough validation.

The features inherent in dynaForms provide many tools for comprehensive form creation. You can assign fields in any order, editing their properties to fit your needs, and control how the collected information is handled. Choose whether or not the form is available to the public by using either manual activation or start and end dates that make the form "live" for a specified period of time. Also available is an on-line payment feature that works in conjunction with the dynaForms tool. DynaForms, coupled with on-line payment, makes virtually any on-line information gathering task easy and manageable. And the dynaForms tool is safe for both the organization and the user because all information is encrypted and hosted on a certified SSL (Secure Sockets Layer) web server.

Overview

The dynaForms software application consists of three main functions: Create New Form, Edit Existing Forms, and Review Records. The Create New Form area takes you through the actual form creation by way of six simple steps. The core of the form is created in this area, and it is here that you will shape your form to your specifications. The Edit Existing Forms function lets you change surface aspects of your form, such as the title, contact information, field requirements, and more. Finally, the Review Records function provides a valuable tool for viewing the results of your form, including unique IDs for each submission and the values submitted for each of the form fields. The final pages of this User Guide include a Toolset Descriptions area for the characteristics and usage of form fields, as well as other general tools within the dynaForms application.

Before You Begin

- This User Guide assumes that you have a basic understanding of on-line forms and form field validation.
- You'll need Microsoft® Internet Explorer version 5.5 or higher to use dynaForms.
- You must be logged into the dynaForms tool to complete the steps described below. You'll need the URL, Account Name, username, and password (all given by OARnet) to log in.
- If at any time you wish further assistance with the dynaForms tool, click "Help" in the dynaForms application, or contact the OARnet Support Center.

OARnet dynaForms Dynamic Form Management Tool 1.0

Step-by-Step Instructions

How Do I Login?

1. Browse to the assigned login URL.

2. Enter the assigned account name in the "Account Name" field.

3. Type your username and password in the corresponding fields, then click "Log-in."

When you have successfully logged in, the **Form Management** menu screen will appear.

How Do I Create a Form?

The following steps are broken down into six sections that appear as separate tabs in the dynaForms tool. As you progress through the form creation, you will be taken to the next tab, or section, in the process (the tabs aren t click-able). The sections are New Form, General, Form-Fields, Handle Results, Preview, and Finished! Use the "< Back" and "Next >" buttons throughout these steps to move from tab to tab.

NOTE: *In the "General" section, you ll come across the Active Start Date and Active End Date tools, along with the "Never Expires" checkbox. With these tools you may specify whether or not the form is available to the public, and for how long. These tools are explained further in Steps 4 through 6, as well as in the Toolset Descriptions at the end of this document.*

New Form

1. From the Form Management menu, click "Create New Form."

2. Click "Next >". You will be taken to the next tab, General.

NOTE: *The "Load as Template" select box will only be used if you have already created a form and wish to make a new form using the existing fields. Using "Load as Template" is described in Toolset Descriptions section later in this guide.*

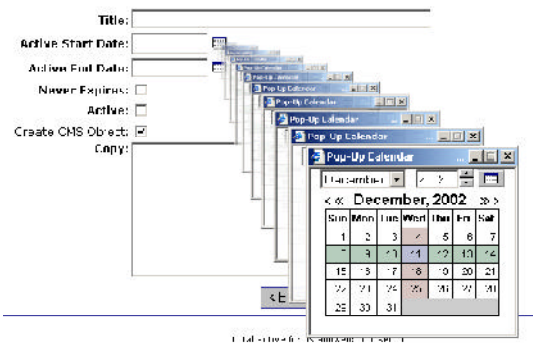
General

Several steps in this section refer to options that give you the ability to control the availability of your form to the public. They are Active Start Date, Active End Date, and Never Expires. Specifying Active Start and Active End dates makes the form available, or "Active",

3. Enter a title for the Form in the "Title" field.

4. Use the calendar tool to select an "Active Start Date" and an "Active End Date" (optional: see below) for the form. You can also manually enter a date using mm/dd/yyyy format. Refer to the Toolset Descriptions section of this guide for tips on using the calendar tool.

Quick Tip: You can leave the Active End Date field blank *only* if you select "Never Expires", as mentioned in Step 5 below.



5. Click the "Never Expires" box if you want to block the Active End Date and make this form stay active. Skip this step if you want your form to become inactive at the time you specified in Step 4.

6. Click the "Active" box if you want to make this form available to the public. You can always enter the tool and make your form active at a later time.

⚠ **NOTE:** *Leaving the "Active" box unchecked will prevent access to the form from the browsers. People will not be able to fill out the form.*

7. Click "Create CMS Object" if you want this form to automatically be created as a Content Object in your CMS web site.

⚠ **NOTE:** *Your web site must be based on OARnet's Content Management System (CMS) for this option to be of any value. This option will not be available to you if your web site isn't on the CMS.*

8. Enter text that describes the form into the "Copy" paragraph field. This text will appear above the form fields.

9. Click "Next." You should now be in the Form-Fields section.

Form Fields

This section includes references to "Standard" and "Custom" fields. These are the two main types of fields you can choose from when building your form. "Standard" fields are the basic and unformatted fields such as radio group, text box, select group, etc., while "Custom" fields are simply "Standard" fields that have been changed to collect specific information on the form. Some "Custom" fields are State, Phone, First Name, Last Name, etc. Refer to the Toolset Descriptions later in this guide for detailed information on "Standard" and "Custom" fields.

10. Add the fields you wish to appear on the form by selecting field types from the "Standard Fields" and "Custom Fields" drop-down menus. "Section Break" will add a spacer on the form which can be left blank for design purposes, or can be used to title different sections on the form.

⚠ **NOTE:** *You can use the up and down arrow buttons that appear to the right of the fields to move them up or down on the form. The button will delete the field entirely.*

Quick Tip: *The "Preview" button at the bottom of the screen will open a new browser window that displays what your form will look like when it's finished. You can use this feature "on the fly" to view your form throughout the creation process.*

11. When you've added all the fields you wish to appear on the form, click "Next >". You will be taken to the next step in the process: Handle Results.

Handle Results

12. If it is not already selected, select “E-mail Results” from the Handle Results drop down menu. In using the “E-mail Results” option, you ensure that dynaForms will send an E-mail message to everyone that has filled out the form, letting them know that their results have been sent to the form administrator (i.e. you, or whoever you designate to build forms).

⚠ **NOTE:** *You must have created an E-mail field on your form for results to be handled using the E-mail option. You can add an E-mail field to your form by clicking “< Back” and adding the field.*

13. Enter the Contact Information for the form. This information is the contact information that you'll want any questions, comments or concerns to be directed to. The E-mail address entered in to the “E-mail” field will be used to send receipts for new entries. Bolded fields are required.

14. Click “Next >”. You should now be at the Preview tab.

Preview

⚠ **NOTE:** *Once you complete Step 2 below, you will not be able to go back and change the fields on your form. The next section, “Editing an Existing Form” explains how to change the labels and required status of the fields, but you will not be able add or delete field once you click “Finish”!*

15. Check (and double-check!) your form on the Form Preview Screen.

16. Once you are satisfied, click “Finish”. The Form has been saved, and you will be taken to the final tab: Finished!

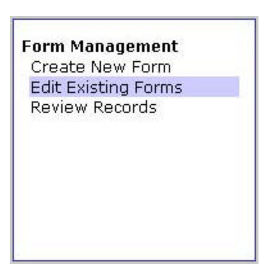
Finished!

17. The information displayed on the “Form saved!” screen includes the finalized links and paths to your completed form. If your form has been saved as a Content Object (See Step 7 of the “General” section), the Content Object information will be available on this screen. The URL for your form is also displayed on the “Finished!” screen.

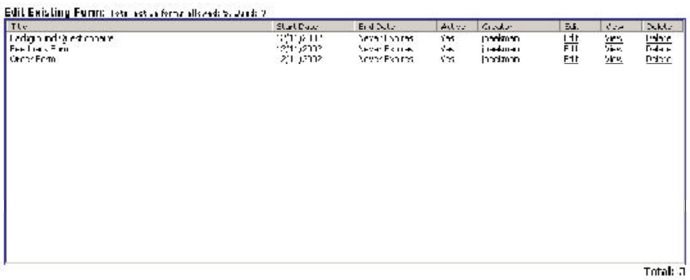
    You can view your new form in its final form by clicking on the “click here” link in the text of the “Form Saved!” screen.

How Do I Edit an Existing Form?

1. Click “Edit Existing Form” from the Form Management menu. A menu will be displayed with the Title, Start and End Dates, Active status, and the Creator of the form. Also available are the three click-able options: Edit, View, and Delete.



The View option displays your form as it appears on the web site (it only appears on the web site if your form is "Active". See Step 6 in the "General" section). The Delete option irrevocably erases the form.



2. Click on the "Edit" option on the appropriate line for the form you wish to edit. Two tabs will appear: Basic Information and Field Information. Unlike the tabs in the Create New Form tool, these tabs are click-able.

   The "Basic Information" tab displays the information you entered in Steps 3-7 and Step 12 of the "How Do I Create a New Form?" section. You can change the form's Title, Start and End Dates, Expiration, Active status, and Copy. You can also edit the Contact Information for the form on this tab.

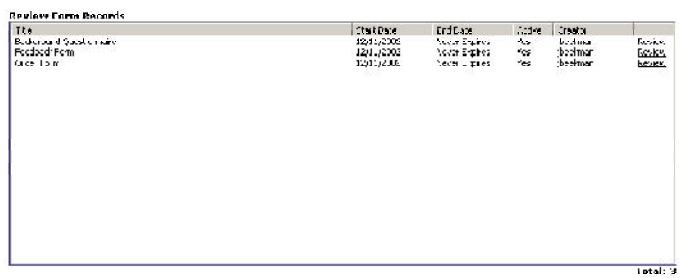
   Clicking the "Field Information" tab brings you to the list of form fields you created in Step 9 of "How Do I Create a New Form?" While you cannot add or delete fields, you do have the ability to change the name of the field as it appears on the form by editing the Field Label fields. You may also designate a new required status by checking or unchecking the "Required/Bold" boxes.

3. Make the desired changes to the "Basic Information" and/or the "Field Information" tabs, then click "Update". The message "Form Information Updated!" will appear at the top of the screen, confirming your changes.

How Do I See the Results of My Form?

1. Click "Review Records" from the Form Management menu.

   A menu will be displayed with the Title, Start and End Dates, Active status, and the Creator of the form. Also available is the "Review" option.



2. Click "Review" on the appropriate line for the form containing the records you wish to review. You will be brought to the Search tool.

3. Specify search parameters using either the calendar tool to search by date of submission, or enter the Order ID. You can leave the search fields blank to bring up all records for the form.

   ⚠ **NOTE:** *The OrderID is the ID assigned to each submitter of the form. This can be found in the confirmation E-mail message that is sent to both the administrator and the user of the form upon completion and submission of the form.*

4. Click "Search" to review records based on your search parameters, or click "Reset" to specify new parameters. The Search Results page should now appear.

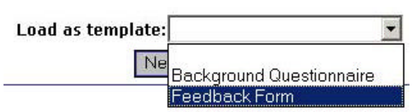
5. Select the OrderID from the left menu to display the form information for that submitter.

Quick Tip: *You also have the option to export the results to an Excel spreadsheet by clicking "Export Results".*

Toolset Descriptions

Load as Template

The Load as Template option is a great way to save time when creating multiple forms that are similar in appearance. On Step 1 of "How Do I Create a New Form?" you can select an existing form from the Load as Template drop-down menu before moving to Step 2. Change the title of the form in Step 3 to your new form title, then simply repeat the steps described in "How Do I Create a New Form?", adding/removing fields and/or editing information along the way.



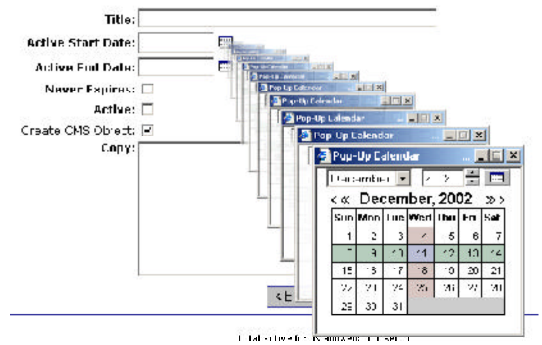
Quick Tip: *If you forget to change the title of your new form, it will appear as (Copy) <form name> and you can use the steps in "How Do I Edit an Existing Form?" to change the title.*

Pop-up calendar

Select a month either from the drop-down list or by clicking on the single arrows (< or >).

Select a year either by clicking on the up or down buttons next to the year display field or by clicking on the double arrows (<< or >>).

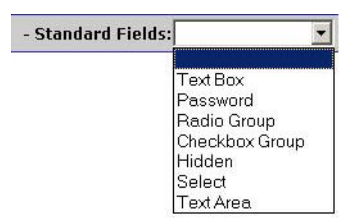
Select a day by clicking on the desired date in a day-of-the-week column.



Form Fields

Standard Fields

Standard fields are basic fields that can be customized to collect the information you want in your form. The options that appear when you add a standard field are the field's parameters. What follows is a brief description of how to use the parameters for each available standard field.



Text Box

The Text Box field can be used to collect virtually any type of information. It is perhaps the most generic type of "Standard" field, and is typically used to collect generic information such as names and short text answers.

Label – Enter a title for this field.

Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. For example, if this text box field is to collect an E-mail address, choosing "E-mail" from the Validate menu will make sure it complies with the xxx@xxx.xxx format before the form can be submitted.

Size – Specify how wide (in characters) the field will appear on the form.

Max Length – Designate how many characters this field should allow.

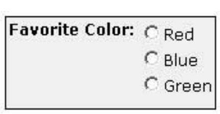
Password
The Password field collects information that is typically a mix of numbers and letters, or alphanumeric information.

Label – Enter a title for this field.

Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. Since passwords can be numbers, text or both, you may wish to leave this validation blank.

Radio Group
Radio Group fields are meant to be used with multiple options from which users may choose only one.

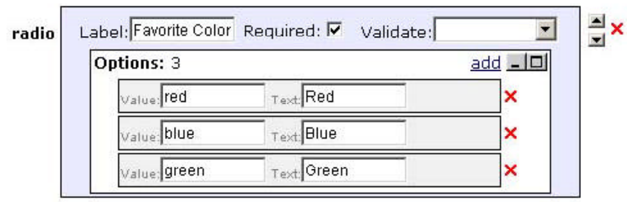


Label – Enter a title for this field.

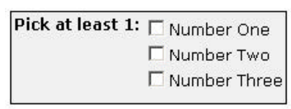
Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. Because you can specify the value that is passed, validation is limited.

Add – Use the Add feature to create multiple options. "Value" is the information that will be passed with the form, while "Text" is what the user will see as a Radio button option.



Checkbox Group
Checkbox Group fields are designed to provide multiple options to choose from. Users may choose one or more of these options.

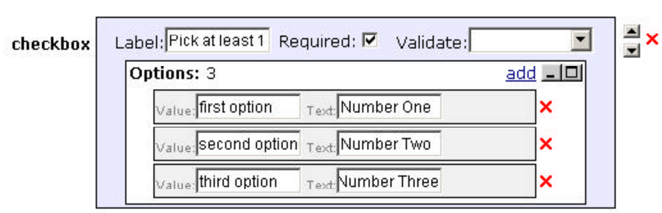


Label – Enter a title for this field.

Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. Because you can specify the value that is passed, validation is limited.

Add – Use the Add feature to create multiple options. "Value" is the information that will be passed with the form, while "Text" is what the user will see as a Checkbox option.



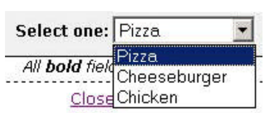
Hidden
The Hidden field is an advanced tool for passing information along with the form that is unseen by the submitter. When you specify a value for the Hidden field, it will automatically show in the "Review Records" area but will never be revealed to the user filling out the form.

Label – Enter a title for this field.

Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. For example, if this text box field is to collect an E-mail address, choosing "E-mail" from the Validate menu will make sure it complies with the xxx@xxx.xxx format before the form can be submitted.

Select
The Select field is used to create a drop-down menu of options from which a submitter may choose only one. For example, most "State" fields are Select fields.



Label – Enter a title for this field.

Required – Select this box when this field is required for the form.

Validate – Use validation for varying types of information you wish to collect. Because you can specify the value that is passed, validation is limited.

Add – Select fields are designed to provide multiple options to choose from. Users may only one of these options. Use the Add feature to create multiple options. "Value" is the information that will be passed with the form, while "Text" is what the user will see as a Select option.

Custom Fields

This menu displays predefined customized field formats for gathering information on your form. Custom Fields have already been customized to collect specific information, such as First Name, Last Name, City, State, Zip, etc.

The features of each of these fields use the same properties of the Standard Fields described above, and can be customized further to suit your needs. The table below provides the types of Custom Fields available and the Standard Field Properties that the Custom Field utilizes.

Customized Field	Standard Field Properties	Validation	Size
First Name	Text Box	None	20
Last Name	Text Box	None	20
Address1	Text Box	None	20
Address2	Text Box	None	20
City	Text Box	None	20
State	Select	None	N/A
ZIP Code	Text Box	Zip	10
Phone	Text Box	Phone	20
E-mail	Text Box	Email	20
Month	Select	None	N/A

⚠ **NOTE:** *More "Custom Fields" may be added to the tool as the need for them increases.*

Glossary of Terms

Content Management System (CMS) – A tool used to build and manage content and information on web sites. Some Content Management Systems provide comprehensive user administration tools in addition to WYSIWYG (What You See Is What You Get) web editing.

Content Object – A single "page" or piece of information in a CMS. Typical Content Objects are web pages and/or files.

Custom Fields – Standard form fields that have been customized to collect specific types of information.

Form – A collection of form fields used to collect information. On-line forms pass this information along to a database when the user clicks a button at the end of the form.

Form Field – A single element of a form used to collect information. Form fields are the building blocks of forms and appear in many different formats and combinations.

OrderID – A UniqueID assigned to each form submission in the dynaForms tool. The search tool provides the ability to search form records by OrderID.

Required Fields – Form fields that require information to be entered before the form can be successfully submitted. The dynaForms tool displays required fields in bold text format.

Secure Sockets Layer (SSL) – A tool used to provide secure communication from the user's browser software to the server and vice versa.

Standard Fields – Versatile form fields without specific validation or built-in customization.

Validation – The means by which information entered into form fields is checked for specific formatting. Common types of form field validation are E-mail, Date, Phone Number, Social Security Number, etc.

Unique ID – An set of characters (typically alphanumeric) used to identify records in a database.

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