Web publishing training pack
Level 3 – Forms

Learning objective:
- Forms for submitting data - create and manage forms where data is saved in the Web Publishing System (e.g. questionnaire, registration, feedback).

This pack includes:
- Participants notes
- Web publishing training sessions on offer
- Session evaluation form

Materials from this session are available at http://www.rmit.edu.au/webpublishing/training/welcome
Web publishing training – participants notes
Level 3 – Forms

Learning objective:
Forms for submitting data - create and manage forms where data is saved in the Web Publishing System (e.g. questionnaire, registration, feedback).

Workshop agenda

1. Forms in the Web Publishing System
2. Form creation
3. Managing form submits
4. Help and Support
5. Closing

Welcome

- Participant’s introduction
- Background and experience
- Expectations of the workshop

All notes and manuals in this workshop are available on the Web Publishing web site: http://www.rmit.edu.au/help/manual/forms

Please tick each section as you complete it.

1. Forms in the Web Publishing System

☐ 1.1 What’s the purpose of forms in the Web Publishing System (WPS) and when should they be used?
Forms are most commonly used to collect registration information, event submission, simple surveys and feedback on an event. They can also be used to gauge interest in future events and other such related topics.

Examples:
- Registration:
- Ask a question:
  VET Essentials: http://www.rmit.edu.au/staff/vet/ask
- Feedback:
  WIN workshop: http://www.rmit.edu.au/win/workshops/feedback
- Request/booking form:
  Application for student use/hire of University space: http://www.rmit.edu.au/timetabling/studentspacehire

Forms in the WPS have simple functionality so they should be with care. They are most successful when used to collect registration information and feedback. They cannot provide shopping carts, multiple pages or guaranteed privacy, therefore aren’t suitable for more in-depth or complicated surveys.

☐ 1.2 Form design and layout
It’s important to think about the purpose of a form before trying to create one. Writing out what information you want to capture can be extremely helpful when working out which form elements to use.
Successful forms have a clear structure to them, making them easy to follow. The information you collect will be clearer, more concise and on topic if thought is put into how the form is structured. There are several things to think about when setting up a form:

1. The logical order of the content
2. Can items be grouped together?
3. Do you have any mandatory items (must be completed)?
4. What labels will you use for your form elements?
5. Have you thought about instructions?

1. The logical order of content
When filling in a form, most people expect to be asked for contact information at the start of the form, not half-way through. Better forms have a clear and easy to follow flow. When putting your form together, think about how the user is comprehending it.

2. Can items be grouped together?
Following on from a logical order is grouping together related items. If form items seem to belong together, they probably do. Grouping items can also cut down on the number of items on the form. Shorter, more concise forms are always better than longer ones.

3. Do you have any mandatory items?
A mandatory (required) field is one that must be completed before the form can be submitted. You specify which fields are mandatory. When the form is published, the WPS marks these items on the page with a red asterisk and will not accept the form until mandatory items are completed.

4. What labels will you use for your form elements?
The “behind-the-scenes” structuring is just as important as the words the recipients see. Individual fields need to be given labels or attributes (as they’re called in Word) that make it easy to manage the data once it’s downloaded. It’s worth spending time thinking about what each field will be called and how you wish to identify it in the submissions.

5. Have you thought about clear instructions?
Clearly written instructions equal better submissions. Use plain English, keep your sentences short and to the point and avoid any jargon. If you have required fields in your form, state that at the top of the page. Explain exactly what you want from the responder and what’s expected in the answers.

It is also very important to consider how a form will look once it’s uploaded. Traditionally, forms have been displayed inside a table. However, this can make a page slow to load and make the form extremely difficult for people using a screen reader. As tables in the RMIT Web Publishing System don’t always behave as expected, it’s better to not use them or use them as sparingly as possible. The most important thing to remember is to put the field’s label or question before it.

The following example doesn’t use a table but is still easy to follow:

1. Checkbox:
   ☐*
2. Radio buttons:
   ☐ A
   ☐ B
3. Text area:

Documentation

For more information on form design and layout, see: [http://www.rmit.edu.au/help/manual/forms/design](http://www.rmit.edu.au/help/manual/forms/design)

Sitemap path: Home / University services / Information Technology Services / Information and services / Web Publishing / Web Publishing System Manual / Publishing Content / Forms / Introduction / Form design and layout
2. Form creation

2.1. What makes up a form?
Forms are essentially a bunch of fields, called form controls. The person creating the form decides which ones should be used. However, the fields have set ways they can and should be used.

Checkboxes
Checkboxes allow the user to select one or more options from a limited number of choices:

On the web page:
- The label or question must appear **before** the set of checkboxes
- The value or description of individual checkboxes must appear **after** the checkbox

When creating these form controls:
- **Name** is the same for all checkboxes in a set (not seen on the page, only in form submission results)
- **Value** of each checkbox in a set must be unique.

One or more options can be checked by default, although the user can uncheck the selection if they wish.

Option button (radio buttons)
Radio buttons are similar to checkboxes, although only one option can be selected from a mutually exclusive set of choices:

Dropdown box
A dropdown box is a list of options that the user can scroll and select from.

A dropdown box can allow one selection:

or multiple selections (use the Ctrl key to select more than one):

One of the options can be set as a pre-selected value, although the user can change this selection if they wish:
Text box
Text boxes allow the user to type letters or numbers in a box:

A text box can include initial values for the user to use or modify:

http://

Web publishers define the width of the text box (if not set, most browsers use a default width of 20 characters), although the user can enter more characters.

Text area
Text area allows the user to enter longer amounts of text spanning multiple lines:

A text area can include initial value text for the user to use or modify:

Dear Planning Minister,

Web publishers define the size of the text area (numbers of character ‘columns’ across and number of ‘rows’ down), although the user can enter an unlimited number of characters.

Submit and Reset
These buttons are placed at the end of the form. When the submit button is pressed, form data is sent to the server for processing. The reset button returns a form to its initial state.

The reset button is optional. Usability experts recommend not using the reset button because it is often pressed by mistake, with annoying results.

Documentation and practical activity
For some examples of form fields: http://www.rmit.edu.au/browse;ID=h3sn080tpkbb

Sitemap path: Home / University services / Information Technology Services / Information and services / Web Publishing / Web Publishing System Manual / Publishing Content / Forms / Introduction / Controls

2.2. Create and edit a form.
To create a form you need to the Form.xml starter document which can be downloaded from the RMIT web site (http://www.rmit.edu.au/webpublishing/templatedownloads).

There is an example form in the WPS manual that can be downloaded to assist you when creating a form: http://www.rmit.edu.au/help/manual/formelements
Working in Microsoft Word
Start your document as you would any other web document – a title on the page with Heading 1 style applied. If your form includes introductory text, place this at the top of the page before the form.

Use the ‘Task Pane’ to see form structure and individual form controls: Microsoft Word toolbar > View > Task Pane.

The Task Pane will open on the right hand side of your document with ‘Getting Started’. Select another task pane from this dropdown list: Task Pane >XML Structure

Below the first area, select the checkbox ‘Show XML tags in the document’. This will show form controls as you add and edit them, to ensure they are placed correctly.

Create the form
Add your form elements using the RMIT Web toolbar - AutoText > Forms:
Define the form area
With the cursor located where the form will start, select AutoText > Forms > Form. This opening and closing tag pair must surround all other form controls on the page. In turn, every form control you add will have opening and closing tags.

As form controls are added, the Task Pane will show form structure in a collapsible tree menu. You can navigate the form using the Task Pane. If structure is incorrect (e.g. a form control outside the form-form tags), or a form control has invalid attributes (e.g. missing a name), a yellow diamond next to that item will alert you. A red vertical squiggle will also appear on the page where the problem is.

Add form controls
Between the form tags, type a label or question, then on the same line or paragraph break, select the form control from the list (e.g. checkbox or radio button).

```html
<form>
  1. Checkbox: <input type="checkbox">
  2. Radio buttons:
     <input type="radio">
     <input type="radio">
</form>
```

Attributes of form controls
Attributes are the properties of every form control: name, size and any initial values. The form will not work unless attributes are applied to every form control.

With the cursor inside the form control you wish to edit, ‘Right-click’ to open the context menu. Select ‘Attributes’
The Attributes dialog opens, where you can create new attributes or modify existing attributes.

To add an attribute:
1. Highlight the ‘available attribute’.
2. Enter the attribute details in the ‘value’ textbox.

3. To commit your attribute, select the button on the top-right, ‘Modify’. Your attributes are listed in the second pane.

4. Follow this process for each attribute.

5. When complete, select ‘OK’ to close the dialog.

For example:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>UserName</td>
<td>Form submission results will show ‘UserName’ associated with text entered in this textbox.</td>
</tr>
<tr>
<td>size</td>
<td>30</td>
<td>Textbox is 30 characters wide on screen, although more than 30 characters can be entered.</td>
</tr>
<tr>
<td>validation</td>
<td>none</td>
<td>Form submission will not fail if the user does not complete this item. (i.e. you don’t have to complete this item). Note: The Web Publishing System has a special code for required fields – prefix ‘R_’ to the name.</td>
</tr>
<tr>
<td>value</td>
<td>No value set initially, so the textbox is empty. Form user adds the value.</td>
<td></td>
</tr>
</tbody>
</table>

**Documentation and practical activity**

> Create and edit a form in Word: [http://www.rmit.edu.au/browse;ID=t2mdavou7n9h](http://www.rmit.edu.au/browse;ID=t2mdavou7n9h)

Sitemap path: Home / University services / Information Technology Services / Information and services / Web Publishing / Web Publishing System Manual / Publishing Content / Forms / Submit Data / Word
### 2.3. Form attributes and validation

#### Form attributes

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
<th>Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox</td>
<td>User can select one or more checkboxes in a group.</td>
<td>Name: Must have no spaces in the name. Each checkbox in a group must have the same name. (e.g. Campus)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Value: The unique value of each checkbox. (e.g. Bundooora)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>NOTE: If a checkbox is required, there MUST be a value set for the checkbox.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selected: true - This checkbox is selected by default. User can override this option. false - This checkbox is not selected by default.</td>
</tr>
<tr>
<td>Radio Button</td>
<td>User can select one button only in a group.</td>
<td>Name: Must have no spaces in the name. Each radio button in a group must have the same name. (e.g. Workshop_Date)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Value: The unique value of each radio button. (e.g. 3 March)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selected: true - This radio button is selected by default. User can override this option. false - This radio button is not selected by default.</td>
</tr>
<tr>
<td>Select</td>
<td>A dropdown box that contains a range of options to select from.</td>
<td>Multiple: true – User may select more than option from this select box. false – User may only select one option.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Name: Must have no spaces in the name.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Size: By default, a select box will display one item and facility to pull-down (drop-down) to view or scroll through all the options. A number value will increase the amount of options shown on the page (e.g. “3” will display 3 options with the facility to scroll for further options if they exist).</td>
</tr>
<tr>
<td>Option</td>
<td>Options for the Select (above). Options must be nested within the select start and end tags.</td>
<td>Display-value: The text displayed for this option in the select box.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selected: true – This option is selected by default. User can override this option. false – This option is not selected by default.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Value: The value for this item that will appear in your form results if selected. Can be the same as display-value (e.g. Tutorial A) or shortened (e.g. A)</td>
</tr>
<tr>
<td>Textbox</td>
<td>One line where user can enter text, numbers, email address, etc.</td>
<td>Name: Must have no spaces in the name.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Size: The width of the textbox on the screen (number of)</td>
</tr>
<tr>
<td>Textarea</td>
<td>User can enter longer amounts of text.</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Columns:</td>
<td>The width of the textarea on the screen (number of characters wide, plus a scrollbar) that varies according to monitor and font settings. Note this does not affect the amount of text can be entered in this box.</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td>Must have no spaces in the name.</td>
<td></td>
</tr>
<tr>
<td>Rows:</td>
<td>The height of the textarea on the screen (e.g. 5 will display 5 rows). Note this does not affect the amount of text can be entered in this box.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Submit Button</th>
<th>Locate at bottom of form for users to submit the form data.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Must have no spaces in the name.</td>
</tr>
<tr>
<td>Value:</td>
<td>Text that appears on the button</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reset Button</th>
<th>Locate at bottom of form for users to reset form to its initial values. This button is optional, and should be avoided for usability reasons.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Must have no spaces in the name.</td>
</tr>
<tr>
<td>Value:</td>
<td>Text that appears on the button</td>
</tr>
</tbody>
</table>

**Form validation**

Form validation is the process of checking form results. The WPS can validate form data when the user submits the form. If certain mandatory fields are not completed, or an email address is not entered correctly, the form is returned to the user for completion.

To make any form field required (mandatory), prefix the control’s name with **R_.**

Example:

UserName (optional, not required)
R_UserName (this field must be completed)

When the form is published, an red asterisk ‘*’ is shown just after the form control.

The ‘R_’ is not included with the name in form submission results.

**Documentation and practical activity**

- Form attributes and validation: [http://www.rmit.edu.au/browse;ID=3do0jk6o366e](http://www.rmit.edu.au/browse;ID=3do0jk6o366e)
2.4. Publishing forms on the web site

Forms are published in the same way as other web pages with two additional settings in the metadata editing screen. These enable:

- Sending form results to one or more email addresses.
- Redirecting the user to another page.

### Email results

All form submissions are saved in the Web Publishing System. They can also be sent to one or more email addresses, useful for monitoring form submissions in real time.

To send form results as email, go to the form metadata editing screen. At the ‘Email Results’ field, enter the email address. If sending to more than one email address, separate each with a comma and space:

```
jane.doe@rmit.edu.au, jane.doe@gmail.com
```

The email results function must be used cautiously. The WPS has been known to not send emails when there has been a submit. If you rely solely on the emails to collect your data, you could miss out on some submits.

### Success redirect

By default, when a form is successfully submitted, the user is returned to the same form with a system message at the top of the page: “The form was successfully submitted”. To improve the user experience, you can redirect the form user to another page in the RMIT web site. This can be an existing page (e.g. the group home page), or a special thanks/confirmation page that you can elect to hide from the site map.

To create the success redirect, first ensure that the page you will redirect to is published (approved). In the form metadata editing screen, enter a clue for the page to redirect to. Resolve the clue as you would a regular clue link.

### How to hide a page from the site map

A thanks/confirmation page is generally hidden from the site map. This saves readers from stumbling upon this page without the form as context.

To hide a page from the site map, edit its metadata:

Display in TOC: No
3. Managing form submissions

When someone submits a form an email will be sent if an email address has been entered in the metadata screen. However, these emails are not always reliable and shouldn’t be used to collect the submissions. They should be used more as a reminder to download the submits from the web site.

Manage form submissions on the website

There are a number of additional options available as tabs across the top of the form for people who are in the group that form belongs to:

These options allow you to search, sort and filter your data online, as well as download form submissions as a Comma Separated Values (CSV) file for manipulation in a spreadsheet, or database.

The different options for managing your data are displayed in tabs:

- **Manage Submits**
  This allows you to search the submitted results, or delete all submissions, or download all submissions. Select the link to download. The file is ‘.csv’ format – comma separated values. This type of file will open in a spreadsheet or database.

- **List Submits**
  This section lists all submissions to your form, by date. You can view or delete individual submissions in this section.

- **Fielded Searching**
  In this section you can search your submissions using the individual fields of your form. For example you could find all the submissions which had entered yes in a particular field. You can also restrict the search to match all fields or some fields.

- **Search Results**
  Your search results (from Manage Submits) will be displayed under this tab.

- **View**
  When you choose to view an individual submission or search result, it will be displayed under this tab.

*Documentation and practical activity*

- Managing form submits: [http://www.rmit.edu.au/browse;ID=lzsbl0u3i87e](http://www.rmit.edu.au/browse;ID=lzsbl0u3i87e)

Sitemap path: Home / University services / Information Technology Services / Information and services / Web Publishing / Web Publishing System Manual / Publishing Content / Forms / Manage submit data
4. Help and support

Web publishing help site
http://www.rmit.edu.au/webpublishing
Includes manual, FAQs, publishing standards – a very resourceful website that should be your first stop for any questions or problems.

Web Interest Network
http://www.rmit.edu.au/win
The Web Interest Network (WIN) is a mechanism for communication between web publishers, managers and others interested in web development at RMIT. If you have any suggestions or wish to join WIN, send an email to: web.network@rmit.edu.au

Label Placement in Forms by Matteo Penzo
An article about the importance of correct place of form item labels.

Web Application Form Design by Luke Wroblewski
http://www.lukew.com/resources/articles/web_forms.html
A how-to on good form design.

Helpdesk
All questions and problems need to be send to the ITS helpdesk [http://www.rmit.edu.au/its] via email at helpdesk@rmit.edu.au or phone 9925 8888 and they will assigned a tracking number and then forwarded to the person best able to help.

5. Closing

Question and issues time.

Want to improve your web publishing skills further?
Register your interest in other advanced topics, or suggest topics.

Please send the ITS Helpdesk [helpdesk@rmit.edu.au] a request for web publishing training - sessions will be run based on demand.

See the web publishing training page for details: http://www.rmit.edu.au/webpublishing/training