By now, almost everyone has filled out an online form of some sort. They’re the virtual forms you type into when you make an online purchase or register a software product or signup for a Web site membership.

Department Tools has a built-in forms feature that gives you the same ability to collect information and feedback from the people who view your site. DT Forms allow you to create live text fields, checkboxes and other input schemes on your DT pages. Users complete the form online and hit a “submit” button, generating an email report containing all the information, which is sent to the address (or addresses) of your choosing. The information is also stored in the administrative side of your DT site, where it can be downloaded in spreadsheet format.

The applications for DT forms are endless. You can conduct polls and surveys; ask people to RSVP to an event; gather information for a mailing list; request feedback on the content of your site; and much more.

Creating a practice form

When starting out, it is helpful to create a practice form to gain an understanding of the options and use of the tool.

To begin, login to your Department Tools account, navigate to the Homepage Editor and create a new DT page called “PracticeForm.”

Forms can be added to any DT page using the Form pulldown menu in the DT HTML EDITOR V.2. The Form menu is the rightmost tool on the top row of the toolbar.

Place your cursor at the point on the page where you want the form to start, then, from the pulldown menu, select “+New Form”

This causes a prompt from DT to name your form. Name the form “PracticeForm” and hit “OK.” You should now see a box framed in red. This is the form boundary.

At this point, please save the page, using the save icon in the upper left-hand corner and then return to the DT HTML EDITOR V.2. window.

You should now see the following elements:
TEXT FIELDS

Let’s say we want to the user to submit their last name as part of the form. To do this, place your cursor within the red form boundary and above the sample email field. Type the phrase “Last name:” and hit Shift-Return. Next, go to the Form pulldown menu and select “Text” to bring up the Text Field Properties window.

Elements of the Text Field Properties window

• Name: Sets the name for the field as it will appear in the email report. For the purposes of our practice form, type in “Last Name.”
• Value: Places text within the text field. Usually, this should be left blank, but it can be used to give a sample of how you would like the information to be presented. For example, if you were asking for a phone number, you might fill in a value of “(XXX) XXX-XXXX” to indicate that you want the user to give the area code in parenthesis. Or, you could give instructions, such as “This field is for first-year students only”
• Character Width: Sets the visible width of the field. If left blank, the tool creates a 20-character field. On our practice form, we should be safe with a character width of 50 for “Last Name.” (NOTE: If someone has a last name with more than 50 characters, the additional characters will still be collected in the field, but only 50 characters at a time will be visible on the Web page)
• Maximum Characters: Sets a limit on the number of characters that can be entered. If left blank, the user can enter up to 500 characters.
• Type: This is a remnant from an earlier version of DT Forms. It’s a pulldown menu, but provides only one option. Feel free to ignore it.
• Make this a required field. Checking this box means the user cannot submit a form without entering text. This doesn’t guarantee a valid answer -- a user could still enter ‘asdasdkals;dfl’ and meet the requirement. But it does help ensure that a well-intentioned user won’t skip an important question.

Creating a Text Field

With “Last Name” in the Name field, “50” in the character width field and the Type set to “text,” hit the “OK” button. You field appears just below the “Last name:” text in the HTML editor window. If the editor, hit the “Save” icon and then use the URL preview to preview your form.

Editing a text field

As we look at the field for “Last Name” on the page, it’s easy to see that the character width of “50” was much wider than it needed to be. Happily, you can edit that information at any time. Go back to the HTML Editor and click on the text field for “Last Name” (Double-click to highlight the field in Mac). Now right-click (control-click in Mac) to bring up the optional menu. Select “Text Field Properties” to get back to the Text Field box. Change the character width to “30.” Click “OK” and then click the save icon when you are through.

Run a test

Now let’s see how the fields work. Go back to the URL preview page and fill in, as a user would, the fields for last name and email address, then hit submit.

You should get a message that indicates your form has been submitted. When this box is closed, it takes you back to the form page.

Close that window and return to the DT admin for your page then repeat the process with a different last name and email address to create a second form posting.

Form Properties

When the user clicks “Submit,” three things happen:
1. An email with the user’s responses is sent to the Department Tools account-holder’s email address.

2. The form results are published in the “Form Results” section of the DT account that contains the form.

3. The user sees a prompt confirming that they’ve successfully submitted a form and they are transported to the home page (index page) for the DT account that contains the form.

Items No. 1 and No. 2 are set in stone. However, you do have two options:

• You can add people to the email notification list.
• You can choose to send users to a page other than the account home page after they’ve clicked submit.

To do this, open the HTML editor window and right-click (control-click for Macintosh) anywhere inside the red dotted form boundary. Now choose “Form Properties” from the pulldown menu that appears. This will give you the options mentioned above, plus the ability to rename your form, if you wish.

Form Results

Now return to the DT admin page and click on the Form Results link at the very top of the window. You should see a My Forms heading with the title of your newly created form below. The page also shows you “Count” (how many people have completed the form) and the date and time of the last entry.

Clicking on the form name shows you a list of the completed forms (posts), along with the date and time they were submitted, the number of form elements completed, the address of the computer that was used to send the post and the operating system and browser being used. Clicking on the date of a single post shows you the full post information, including the content of the fields. The information for each of the posts has also been sent to the email address indicated on the DT account.

At the top of the page, there is an “Export to Excel” button that allows you to convert posts to a spreadsheet format. (In Macintosh, this button downloads a file which is not immediately usable for Excel. Simply change the name of the downloaded file from “form-excel.asp” to “form-excel.xls” and it should open fine.)

OTHER FORM ELEMENTS

In addition to the simple text fields we’ve created, there are three more types of data gathering tools that can be used in DT forms.

• Checkbox. Checkboxes are used when, in answer to a single question, the user may select any number of responses. In other words, each checkbox is independent of all other checkboxes in the list of possible answers, so checking one box doesn’t uncheck the others.

For instance, a checkbox question could be “What European countries have you traveled to?” with a checkbox for each country in Europe. The user can select as many countries as they’ve been to.

• Radio Button. Radio Buttons are used when there is a list of two or more options that are mutually exclusive, and the user must select only one. Clicking a non-selected radio button will deselect whatever other button was previously selected in the list.

For instance, a radio button question could be “What is your favorite European country?” with a button for each country in Europe. Unlike the checkbox, though, only one selection is allowed.

• Text Area. The Text Area tool allows for the creation of large fields to accommodate a block of text. Unlike the Text fields, Text Area fields can be more than one line in height. Use Text Area fields for open-ended questions such as “What is your favorite memory from your trip to France?”

CHECKBOXES

Return to the DT admin page for your practice form. In the HTML Editor window, place your cursor after one of the two existing field boxes and hit Return. Now we’re ready to add more fields.

Imagine we have a cookout coming up and want to get a sense of what condiments to order for the hamburgers. We have three options: Cheese, Onion and Pickles, but the guests can ask for one, any two or all of the options.

Here’s a possible strategy …

Type “What condiments do you like on your hamburger?” and hit shift-return.

Select Checkbox from the form pulldown menu to get the Checkboxes Properties window.
Elements of the Checkbox Properties window

- **Checkbox Name**: This is the heading that will appear in the report after the posting. Regardless of the question asked, you may want to truncate the name for your reports. For instance, a question like “What condiments do you like on your hamburger?” might carry the Checkbox Name “Condiments.” As long the name makes sense to you in the report.

- **Checkbox Value**: This sets the word or words that will appear in the posting under the Checkbox Name heading when the box is checked. (More on that below.)

- **Selected**: This allows you to set the default state of the checkbox as “checked.”

**Creating a checkbox**

In the Checkbox Name field, type “Condiment.” In the Checkbox Value field, type “Cheese.” and click “OK.” You now have a checkbox in the HTML Editor window. Your cursor should appear right after the checkbox. Now type “Cheese” and hit Shift-Return on your keyboard.

Select Checkbox from the pulldown menu again. In the Checkbox Name field, type “Condiment.” In the Checkbox Value field, type “Onion” and click “OK.” Type “Onion” in the HTML Editor window and hit save.

Select Checkbox from the pulldown menu again. In the Checkbox Name field, type “Condiment.” In the Checkbox Value field, type “Pickles” and click “OK.” Type “Pickles” in the HTML Editor window and hit save.

Now preview and test your page, selecting Pickles only.

You may have noticed that we used the same Checkbox Name for all the checkboxes related to the question. When this happens, the results appear in one line in the post.

**Condiments | *, *, Pickles**

In this result, unchecked boxes present with an asterisk. Checked boxes present with the value you choose.

Depending on how you want the form results to present, you may want the Checkbox Names and Values to be different.

For instance, if you wanted the user to list their name and, later, the names of their teammates, the first Checkbox Name might be “name” followed by “name2,” “name3.”

**Editing a checkbox**

You may return to the Checkbox Properties window by selecting the form element, right-clicking to bring up the optional menu (Control-click for Macintosh), and then selecting Checkbox Properties.
**RADIO BUTTONS**

As with the checkboxes, place your cursor where you want to insert a radio button and select “Radio Button” from the form pulldown menu.

**Elements of the Radio Button Wizard window**

- **Radio Name**: This is the heading that will appear in the report after the posting. Regardless of the question asked, you may want to truncate the name for your reports. For instance, a question like “What is your favorite country in Europe?” could carry the Radio Name “Favorite Country?” or even an abbreviation like “Euro?” As long as it makes sense to you. If you want each of the buttons to appear on its own line, you’ll need to click the checkbox, otherwise the buttons will line up across the page.

- **New Label**: This is the text that will appear on screen next to the button. The Wizard takes care of this for you.

- **New Radio Value**: This is the word or words that will appear in the report when the user makes this selection. Often this value will be the same as the label. But it can also be useful to make the value different than the label. For example, you could create a multiple choice question like “Which of these countries was neutral during World War II?” with labels for Italy, Germany and Switzerland. But the corresponding values for those countries be “wrong” “wrong” and “correct.” If the Radio Name for that question was “Question 5” this is how the element would present in the report:

| Question 5 | correct |

Another possible use -- out of a spectrum of applications -- would be for identifying target groups.

Say we had a limited number of coupons for discounted Italian language lessons and wanted to mail out the coupons only to those who would be most likely to take advantage of the courses. We decide to ask a group of people their favorite country Europe to get a sense of who might be most interested. Certainly, those that chose Italy as their favorite would be more likely to want the lessons. However, there are Italian-speaking parts of Switzerland, as well. We could just sort for both Italy and Switzerland, but a more direct way would be to use different radio button values.

In this case the Radio Name might be “Mailer?” and the values for Switzerland and Italy might be “Yes” while the Radio Values for other countries would be “No.”

- **ADD+ button**: Adds to your list of radio buttons.
- **DEL button**: Deletes a previously created button.

**Editing a radio button**

You may edit the Radio Name or Radio Value by selecting the form element, right-clicking to bring up the optional menu (Control-click for Macintosh) and then selecting Radio Button Properties.

The Label can be edited in the HTML Editor like normal DT text.

**NOTE**: You cannot add or subtract buttons from an established Radio button set using the Radio Button Properties screen. To make additions or subtractions you must either delete the buttons and redo the set, or manipulate the HTML. For the latter option, contact Tim Hart (6192) or Bryan Masters (3436) from University Relations.
TEXT AREAS
As with the other form elements, place your cursor where you want to insert a text area and select “Textarea” from the form pulldown menu. This brings up the Text Area Properties window.

Elements of the Text Area Properties window.
- **Name**: Sets the name for the Text Area field on the report. This name will not show up on the screen.
- **Columns**: Sets the horizontal size of the Text Area. For a normal DT page -- one with a right-hand navigation -- the suggested maximum width is 60 columns. For the DT Full-Width Template -- no right-hand navigation -- the suggested maximum width is 80 columns.

NOTE: Text area boxes shouldn’t fill the entire possible width of a DT page because different browsers interpret the column width differently and may clip the text area. Also, at extreme widths, the usability of the text area box suffers.

- **Rows**: Sets the height of the Text Area.
- **Make this a required field**: Checking this box means the user cannot submit a form without entering text. This doesn’t guarantee a valid answer -- a user could conceivably enter ‘asdasldkals;df” and meet the requirement. But it does help ensure that a well-intentioned user won’t skip an important question.

Editing a Text Area
Text Area is editable in the same way as the Text field tool. In the HTML Editor and click on the text area (Double-click to highlight the field for Macintosh), then right-click (control-click for Macintosh) to bring up the optional menu. Select “Textarea Properties” to get back Textarea Properties box.

A WORD ABOUT TESTING
You’ve learned all the form elements and have thought out your names, values and labels to get the information you want to receive. But there’s a problem: Not everyone thinks like you, and not all users think alike.

ADDITIONAL RESOURCES
The pdf of this and other Department Tools instruction documents, as well as online training resources, are available at the Department Tools Web site at www.wichita.edu/departmenttools
University Relations also offers focused training sessions on this and other Department Tools features. Consult the online DT Training calendar for dates and schedules at www.wichita.edu/dttraining.
You create a form by selecting “+New Form” from the form pulldown menu. Each form must have a unique name.

You add form elements with the same form pulldown menu. All form elements must be inserted within the red-bordered area and below the alert box.

The types of form elements
- **Text field** – Creates a one-line text box for short replies.
- **Text area** – Creates a multiple-line text area to accommodate longer replies.
- **Checkboxes** – Used when multiple answers to a question are possible.
- **Radio buttons** – Used when only one answer to a question is possible.
- **Submit button** – Lets the user submit the form.

These tools can be added to any Department Tools page using the form pulldown menu in the HTML Editor V.2.

Existing form tools may be edited in the HTML Editor by selecting the form element and the right-clicking to bring up the optional menu. (*Mac users control-click to bring up the optional menu.*)

Submitted forms or “posts” are logged in the My Forms section of your DT admin page. A copy of the post is also emailed to the owner of the DT account.

**Terminology**
- **Form Element** – This is the graphical part of the form tool, whether field or box or button. *EX — A small box is the form element for the checkbox tool.*
- **Name** – Refers to the heading that will appear on the post after a form is submitted.
- **Value** – Refers to the user’s response and/or how the response presents in the post.
- **Label** – Refers to the on-screen question or label for the element.
- **Character Width** – Sets the width of the on-screen box in a text field. Additional characters will still be collected by the field, but will not be visible on-screen.
- **Maximum Characters** – Sets a limit to the number of characters that can be entered in a text field.
- **Columns** – Sets the horizontal size of a Text Area. For a normal DT page, a full-page-width Text Area is 85 columns. For the DT Full-Width Template, a full-page-width Text Area is 118 columns.
- **Rows** – Sets the vertical size of the Text Area.
- **Shift-return** – Creates a break instead of a full return. Helpful for cleanly grouping elements with their labels.