

Form Builder

Creating a Form using Form Builder

Choosing the right type of Form

- Surveys generally contain more than one question.
- Polls generally contain only one Question. Polls are further sub-classified as Questionnaire or Feedback Forms.
 - Questionnaire: collection of user-defined Questions.
 - Feedback: collection of user-defined questions with a set of static fields. The static fields may be customized but will appear at the top of any Feedback Form. A Feedback Form may only contain the pre-defined Question fields and does not require the insertion of any other Questions.

Questions and Answers for Forms

Organizing Questions into Groups makes identification and data retrieval more convenient for the Survey Administrator while making a form more appealing visually. For instance, instead of creating separate questions for first name, last name, mailing address, email address and phone number, one question for "Contact Information" may be created with the other fields as Answers contained in the Question.

Question and Answer sets may be managed via the navigation links in the Form Builder Module.

Questions:

- Enter a Reference Name or title for this Question. For administrative use only, this name is not visible to a Survey user.
- Type the entire Question to be asked a Survey participant in the single line textbox labeled "Question".
- Is an Answer Required for this Question by the user? Specify by selecting "Yes" or "No".
 - If "Yes", a user will be unable to progress to the next area of the Survey or complete the Survey without providing a response to this question.
 - Selecting "No" will allow a user to proceed with the Survey without providing a response.
- Click "Next" to continue with the creation of this Question's Answer options.

Answers:

- Reference Name – Title of this Answer
- Group Label – This is the label displayed on a set of Answers for grouping answer sets under a single Question.
- Value Type
 - Checkbox - Used when multiple answers to a question are to be allowed as selections.
 - Combobox - Also known as a "drop-down" box. The field appears as a one-line option until clicked on. The options drop-down from a single line to display choices.
 - Files - Allows file uploads from a user, such as a document or image from a local hard drive. Allowable file types for upload are entered into the Checkbox/Radiobutton/Combobox Options field.
 - Select value type = "file", and
 - Answer Type = "file upload"
 - Radio – Radio buttons restrict a user to selecting one answer selection from a group of possibilities. All choices are visible on the page.
 - State List – Inserts a drop-down list of US states into the form.
 - Text – Creates a single line text field for smaller blocks of information such as a phone number, name or email address. Options for the length and maximum allowed characters for this field are available in the next block, "Textbox Options".
 - Textarea – Creates a multiple lined text box for longer answers such as comments. Options for the number of columns and rows for this field are available in the edit block, "Textarea Options".

- Textbox Options
 - Size - For text fields, this designates the horizontal length of the text field.
 - Maxlength - For text fields, the field will only allow up to the maximum number of characters designated in this area to be entered into the Form text field.
 - Answer Type - For text fields and file uploads, this is the validation procedure to be performed on data submitted by users to restrict users to entering acceptable data. Answers may be entered by users as:
 - Phone number,
 - E-mail address,
 - Zip code,
 - Social security number,
 - Generic text,
 - Numeric (numbers only),
 - Alpha (letters only),
 - No spaces (to be allowed in form field),
 - Date
 - Time format
 - File upload (must be selected if the selected Value Type is "File")
- Textarea Options - Set the height and width for text fields (measured in characters). Columns are vertical. Rows are horizontal.
- Checkbox/Radiobutton/Combobox Options: Answer Values - Enter valid file extensions allowed for uploads, such as .doc, .gif or .jpg, into the text field and click Add To List. This feature will restrict the types of submitted files by Form users to only accepted formats. More than one type of file format is allowed for each file upload field. Selecting "Other" will add the text "Other" to the list and include a one-line text field below the selection list.

Select "Add Another Answer" to include another Answer option for this Question and follow the instructions above. There is no limit to the number of Answer options that may be created for a Question.

Select "Next" when all Answer options have been created to finish formatting this Question.

If multiple Answer options are offered for this Question, specify the Answer order in this section.

- Highlight an Answer and use the UP/Down arrow icons to rearrange the order of the Answers on the Form.

Click "Finish" when all Answers to this Question have been completed.

Retrieving Form Results

Receiving Form submissions via email

- All Forms in an Instance:

An email address for all Form results contained in an Instance will be sent to is managed from the Instance Manager link in the Form Builder module. If no email address is set in this area, Form results will, by default, be available for retrieval only through the Alarius Admin system. Individual Forms may be set to send results to an email address by opening the Form for editing.
- Individual Forms:

From the Survey List screen in Form Builder, click the Form title to open it for editing. Enter the email address to send Form results to in the "Email Results To:" field.
- Retrieving information from submitted Forms in the Alarius Admin:

From the Survey List screen in Form Builder, select "View Results" under the Title of the desired Form.
- Exporting Results:

Click "Print Results" in Form Builder navigation. Select a Form from the drop-down list, set any other desired search parameters and click "Submit". To view the Excel file, click the Export to Excel link at the top left of the Window. To save the Excel file without viewing it, right click on the Export to Excel link and choose "Save Target As".

Note: Attachment information is not sent through email and must be retrieved via the Alarius Admin system.

Linking to Forms from Navigation or a Web page.

Links to Forms are created via the Custom Link Manager in the Editor toolbar. Forms may be added to Site navigation through the Navigation module.

Form Builder FAQ***Can I use Forms for online ordering?***

If you are not using Shopping Cart and have instead chosen to process orders outside of the WebDirect Admin system, you may set up Forms to collect order information from Site visitors. Please be aware information submitted via Form Builder is not securely transmitted.

Can I send Form results to more than one email address?

Yes. To send individual Form results to multiple email addresses, open the Form for editing. In the "Email Results To:" field, enter the email addresses separated by a semicolon and a space, just as you would in regular email.