

Forms Editor Block

The Forms Editor block is used to build HTML forms and present them anywhere within your site. When site visitors complete your form, Titan CMS can email the data to one or more designated email addresses and store the submitted information in our database. It can also track your form responses through Titan CMS or download the data as a spreadsheet.

Features:

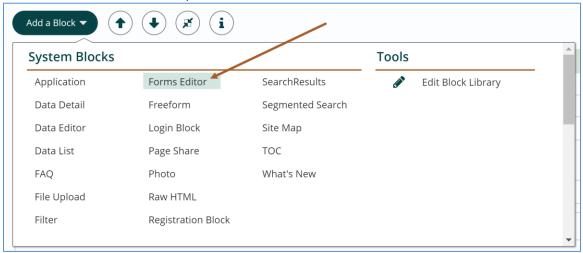
- Allows simple and complex field validation rules
- Presents a textual confirmation message after form submissions
- Email support for form data recipients with selection of desired fields
- Optional email support for form submitters with selection of desired fields
- Results retrieval interface for data analysis
- Editor functionality

Common Uses:

- Event Registration forms
- "Contact Us" style forms
- Requests for information

Create a Basic Form With Text Fields

- 1. Open a page.
- 2. From the Add A Block menu, select Forms Editor.

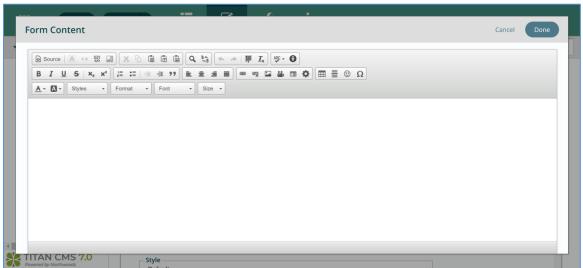




3. Give your form a name and description. The description will not be visible anywhere on the site. It is used for internal organization only.



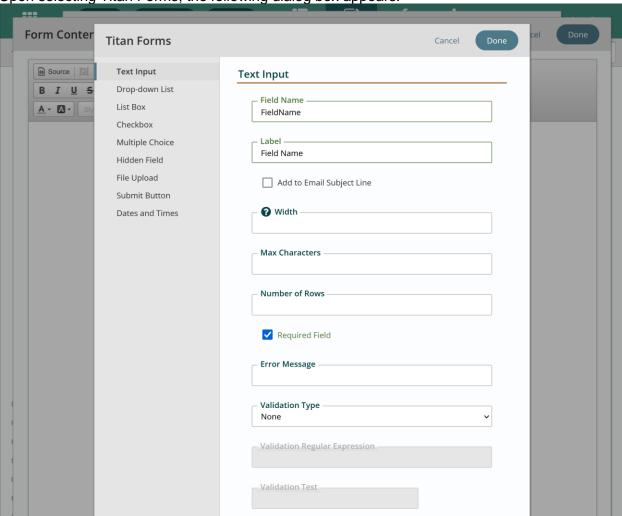
- 4. Click the Edit Form Content button to open the Form Content Editor.
- 5. You will now see the Form Content Editor window, which is very similar to the Freeform Block. You can enter regular text here as you would in a freeform block, as well as form fields.



6. There is a Titan Forms button in your Form Content Editor. To add in input type to the form, click the Forms Editor Block icon



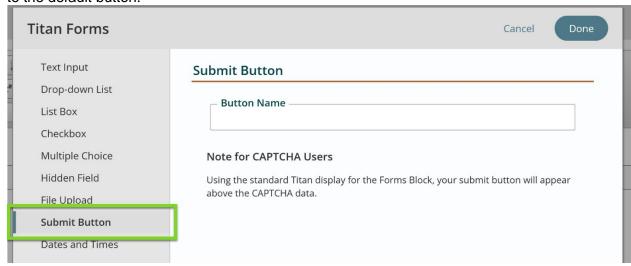
7. Upon selecting Titan Forms, the following dialog box appears:



- 8. To enter a basic Text Box field (default display):
 - a. **Field Name:** This becomes the internal database name for this field. It cannot have any spaces or special characters. Example: FieldName or Email
 - b. Label: This will appear before your form field both in the workstation and on the display site. If a field is required, best practices for accessibility suggest including (required) at the end of this field to ensure this is clearly understood visually and by screen reader users.
 - c. **Pixel Width/Max Characters:** You can leave this at the default. Our styling overrides this field.
 - d. **Required field:** If you want to require the user to complete this field before submitting the form, check this box.
 - e. **Error Message:** Enter the error message you wish to display if there is a problem with the field entry. Error messages must indicate which field is in error. For example, "Email is a required field."
 - f. **Validation Type:** Use this for Email or Phone numbers. Titan will verify the formatting of the field, if selected.



- g. Click DONE when you're done.
- Continue to build your form, adding fields for the information you would like to collect.
 See Additional Form Field Options to read about other field options.
- 10. Scroll down in the Titan Forms Editor to find the **Submit Button** option. For simple forms with button text "Submit", it is not necessary to add a submit button. Use this if you would like to use different text on the button or have another need that requires customization to the default button.



11. Whatever text you put in the Button Name field will appear as the submission button for your form:

Submit

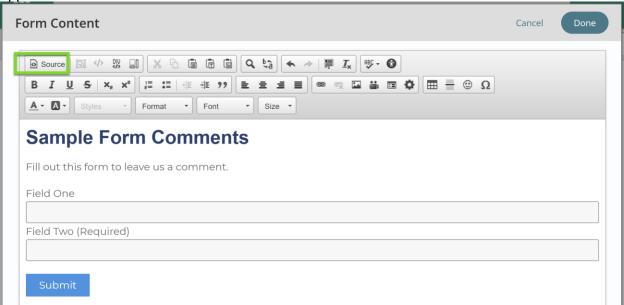
- 12. Click Done in the Form Content Editor. This will bring you back to the main Forms Editor. Hit Done there as well.
- 13. Publish your page. For thank you messages and other follow-up text or page redirects after the form is submitted, see "Post Submit User View."

Accessibility Edits in the Source Code

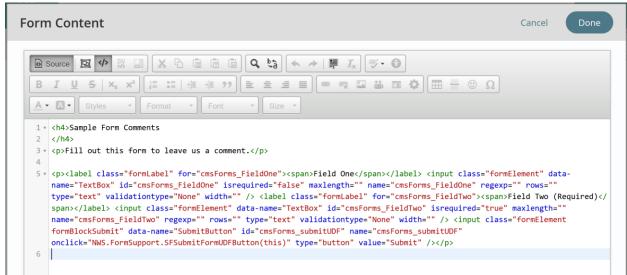
In certain cases, you will want to go into the source code to update the form and make it more accessible for screen reader users. Common reasons for this would be if you have instructions for the form, required fields, or multiple choice options like checkboxes and radio buttons that need descriptions for the group of options.



1. After adding the necessary inputs using the methods above, hit the Source button in the upper left corner of the Form Editor.



2. The source code for the above form would look like:



3. If you have instructions for the form as a whole that the user should understand before beginning, add a <fieldset> element around the entirety of the instructions and the inputs you created. Insert "<fieldset>" at the start of the form content, the editor should automatically create a closing </fieldset> tag which you will need to move to the end of the content you would like to wrap. What this does is mark the whole form as one associated collection.



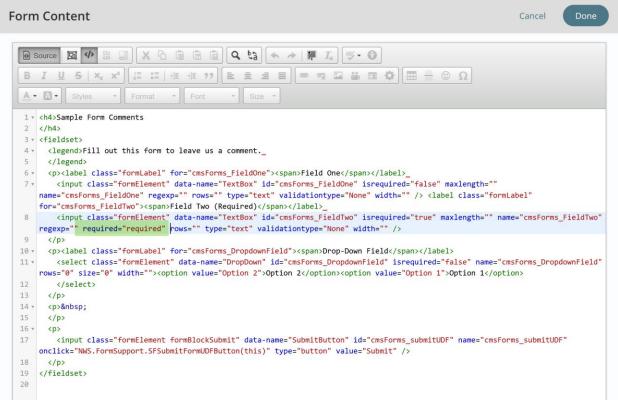
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A ▼ A ▼ Styles ▼ Format ▼ Font ▼ Size ▼
1 v <h4>Sample Form Comments
   </h4>
3 ▼ <fieldset>
     Fill out this form to leave us a comment.
6 v <label class="formLabel" for="cmsForms_FieldOne"><span>Field One</span></label>__
7 * <input class="formElement" data-name="TextBox" id="cmsForms FieldOne" isrequired="false" maxlength=""</pre>
   name="cmsForms_FieldOne" regexp="" rows="" type="text" validationtype="None" width="" /> <label class="formLabel"
   for="cmsForms FieldTwo"><span>Field Two (Required)</span></label>
    <input class="formElement" data-name="TextBox" id="cmsForms_FieldTwo" isrequired="true" required="true" maxlength=""</pre>
   name="cmsForms_FieldTwo" regexp="" rows="" type="text" validationtype="None" width="" />
    <input class="formElement formBlockSubmit" data-name="SubmitButton" id="cmsForms_submitUDF" name="cmsForms_submitUDF"</pre>
   onclick="NWS.FormSupport.SFSubmitFormUDFButton(this)" type="button" value="Submit" />
11 </fieldset>
```

- 4. You can nest fieldset elements, and should do so if you have multiple choice options in your form. See the instructions for multiple choice fields to learn more.
- 5. If you have any instructions for your form, you will want them to be visible and read by assistive technology as a legend. Put <legend></legend> around the start and end of the instruction text. All instructions and examples should come before they are needed in the form, not as further instructions below or after a field.

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A · A · Styles · Format · Font · Size ·
1 v <h4>Sample Form Comments
2 </h4>
3 v <fieldset>
4 v <legend>Fill out this form to leave us a comment.
   </legend>
6 v <label class="formLabel" for="cmsForms_FieldOne"><span>Field One</span></label>__
 7 v <input class="formElement" data-name="TextBox" id="cmsForms_FieldOne" isrequired="false" maxlength=""</pre>
   name="cmsForms_FieldOne" regexp="" rows="" type="text" validationtype="None" width="" /> <label class="formLabel"
   for="cmsForms_FieldTwo"><span>Field Two (Required)</span></label>_
    <input class="formElement" data-name="TextBox" id="cmsForms FieldTwo" isrequired="true" required="true" maxlength=""</pre>
   name="cmsForms_FieldTwo" regexp="" rows="" type="text" validationtype="None" width="" />_
   <input class="formElement formBlockSubmit" data-name="SubmitButton" id="cmsForms_submitUDF" name="cmsForms_submitUDF"</pre>
   onclick="NWS.FormSupport.SFSubmitFormUDFButton(this)" type="button" value="Submit" />
11 </fieldset>
```

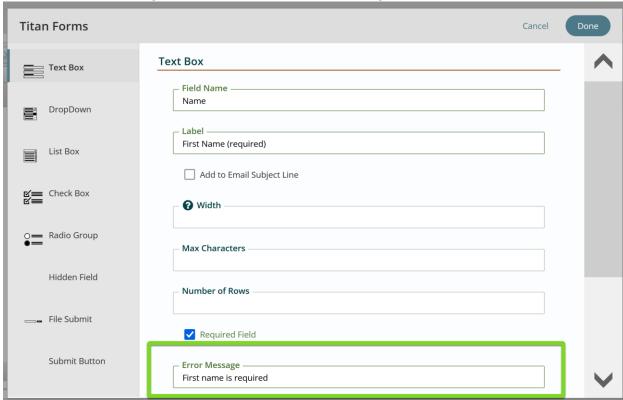


6. If any of your fields are required, you will want to add in required="required"



7. Additionally, all required fields need descriptive error messages. Error messages must be descriptive of the field in question, e.g. "First Name is required" instead of "this field is





required." Error messages are entered in the Error Message field of Titan Forms.

8. A note about source edits: When you enter labels directly in the source code, they do not always appear in the Titan Forms Editor. They do appear on the site, and function correctly. However, especially for fields other than text boxes and fields that contain a paragraph break, the Forms Editor does not always pull that in to populate the label field on the WYSIWYG side of the editor in Titan.

Delete A Form Field

- 1. Click on the field in the form content.
- 2. Select delete on your keyboard. The field will be removed from your form.
- 3. Click Save or Publish from the App Ribbon.

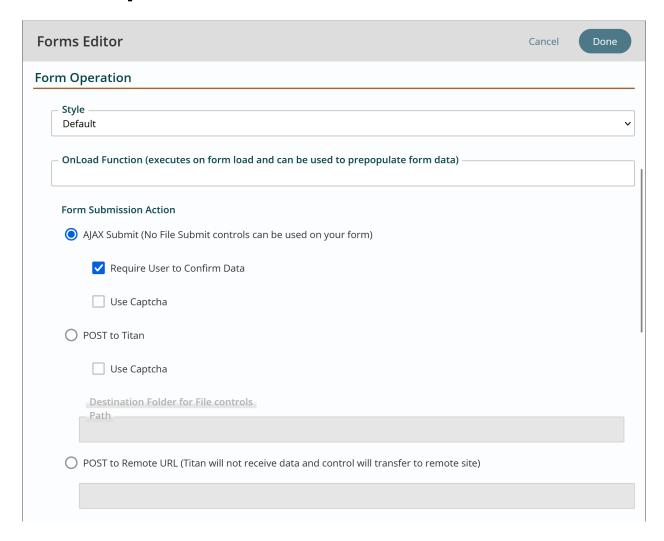
Edit a Form Field

- 1. Click on the field in the form content.
- Click the Titan Forms icon.



- 3. The Form Content box will open. Make all desired changes.
- 4. Click Done to retain the changes.
- 5. Click Save or Publish from the App Ribbon.

Form Operation Functions



Form Operation is the first section below Form Information in the Forms Editor.

Style



Generally, you will use the default style for your site. If your Style Guide has multiple form styles, you could choose an option from the drop down.

OnLoad Function

The OnLoad Function is used to pre-populate a text field in the form based on function. A function will need to be created. To enable this function, please contact your Account Director for developer assistance. More information can be found on the Titan CMS Documentation site.

Form Submission Action

AJAX Submit

- This is not available if you are using the file submit option
- Require User to Confirm Data (User will use Send and Edit buttons when reviewing)
- Use Captcha. In order to use Captcha, you will need to <u>configure Titan Administration</u> with a captcha key

POST to Titan

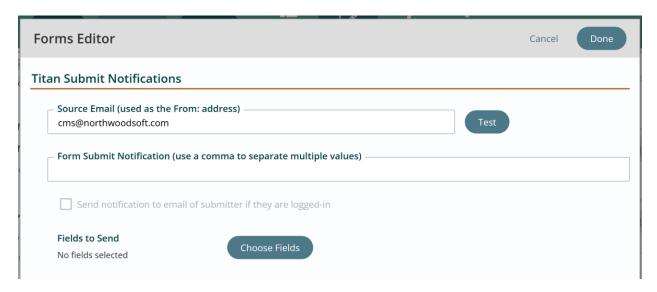
- **Use Captcha** In order to use Captcha, you will need to <u>configure Titan Administration</u> with a captcha key.
- Choose Folder Use this option when File Submit is configured in your form. This is
 where you will select the folder where submitted files will be stored.
 NOTE: the folder must have Security set to Everyone, or the File Submit action
 won't work.

POST to Remote URL

Titan CMS will not receive data and control will transfer to remote site.



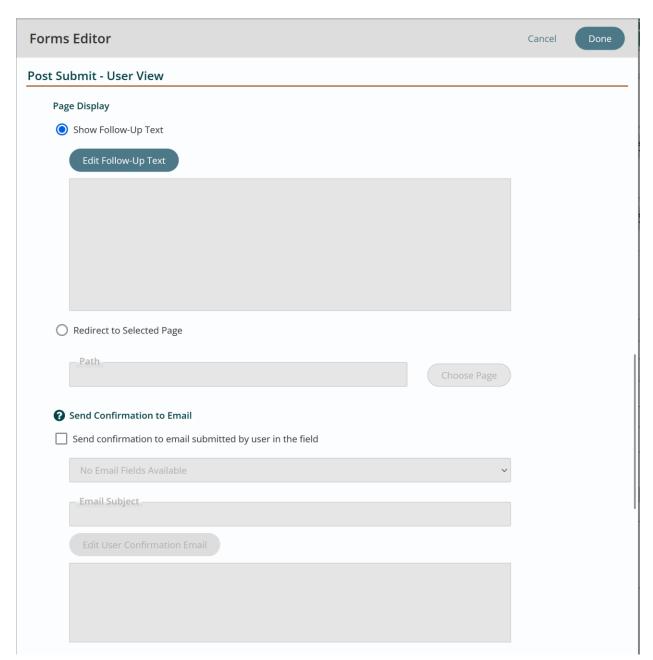
Titan Submit Notifications



- 1. In the Form Editor, under Titan Submit Notifications, set your Source Email to an organization/business email address.
- 2. The Form Submit Notification should be the email address of the individual receiving the submission. You can have multiple addresses, but they must be separated by commas.
- 3. Click the Choose Fields button and select the fields you wish to send in the notification email.



Post Submit - User View



Add follow up text to page display following form submission (Page Display)

You can enter text that the user will see after submitting the form.



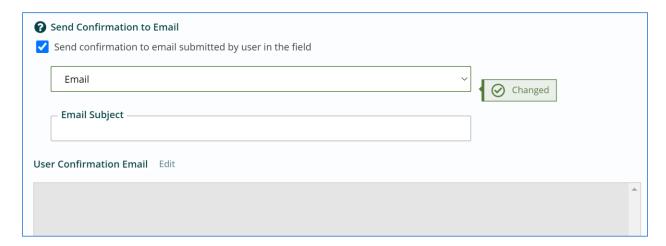
- Click the Edit link.
- Use the WYSIWYG text editor to enter the text that will appear when the visitor submits the form.
- 3. Click Done.

Redirect to another page following form submission (Redirect to Page)



- 1. Select the Redirect to Selected Page radio button.
- 2. Click the Choose Page Button to browse to find the page in your Navigation Tree.
- 3. Publish.

Send Confirmation Email



- 1. Click the Send User Email checkbox.
- 2. From the drop-down list, select the email field. Note: An Email Text Field with Verification of the format is required to be built in the form to show up in this list. This field will be used on the form to collect email addresses.
- 3. Enter a subject in the Email Subject field.
- 4. Click the Edit link for User Confirmation Email. The link will only display when checkbox is checked.



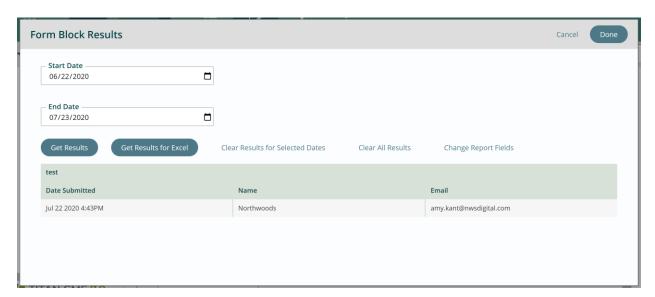
- Build the content for the User Confirmation email in the content section using the WYSIWYG options.
- 6. Click done.

View Form Submissions

The last portion of the Forms Editor block allows you to view the results of submissions. By default, it shows the last 30 days.



The Get Results functionality is also available from your Titan CMS Workstation dashboard. You can configure your dashboard to include this widget. As an alternative, you can open the Forms Editor block on the page and scroll to the very bottom where you will find the Get Results section of the block.



- Use the date fields to filter your results.
- Get Results is clicked after you have changed your Start or End Date fields.

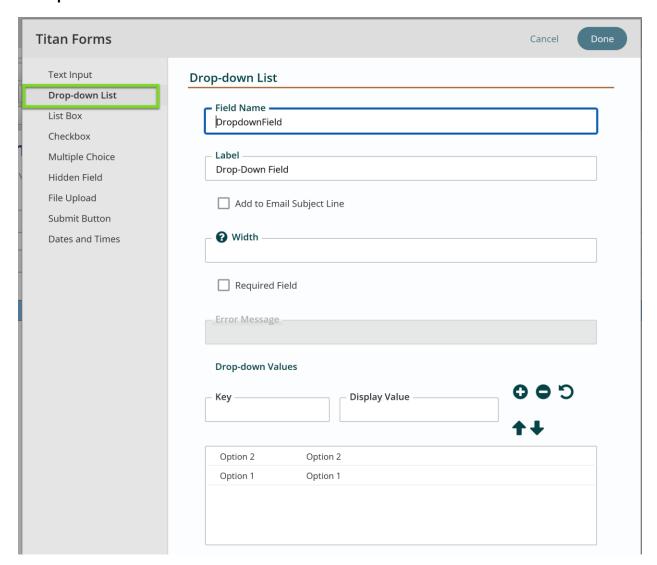


- Get Results for Excel will open the data in an Excel spreadsheet.
- Clear Results will clear everything out of the database (not just your filtered results).
- Change Report Fields will allow you to select those fields you wish to display. You can change these at any time you won't lose your data if you delete fields.



Form Field Options

Drop Down List Field



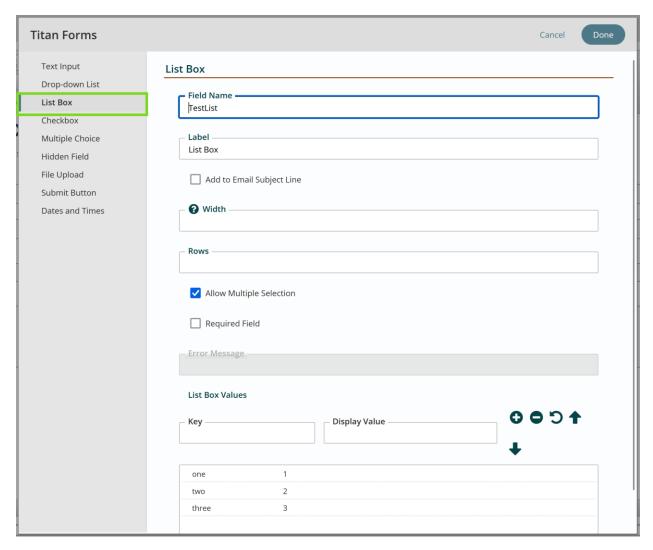
Add a Drop-Down List

- 1. Click the Titan Form Icon in the WYSIWYG tool. The Text Box List template will display by default.
- 2. Select Drop-Down List from the left navigation list.
- Enter the Field Name and Label, and, if applicable, the width and required field and error message.



- 4. Enter the list options into Key and Display Value in the Drop-down Values section. Hit the plus button after each option is entered. If you would like to rearrange the order of the list, click on a list item and hit the up or down arrow button to move it.
- 5. Select Done to add Drop Down List to form. The Form's Content screen will display.
- 6. Click Save or Publish from the App Ribbon.

List Box Field



Add a List Box

- 1. Click the Titan Forms Icon in the WYSIWYG tool. The Text Box template will display.
- 2. Select the List Box from the left navigation list.

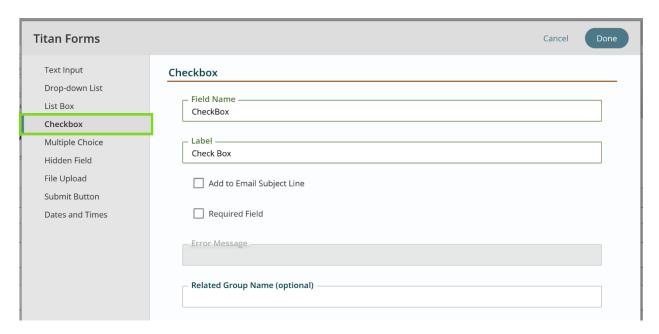


- 3. Enter the Field Name and Label, and, if applicable, the width, the required field and error message, and if multiple selections are allowed.
- 4. Enter the List Box Values into Key and Display Value in the Drop-down Values section. Hit the plus button after each option is entered. If you would like to rearrange the order of the list, click on a list item and hit the up or down arrow button to move it.
- 5. Select Done to add List Box to form or Cancel. The Form's Content screen will display like so, with your default styling applied.



6. Click Save or Publish from the App Ribbon.

Check Box Field



Add a single Check Box

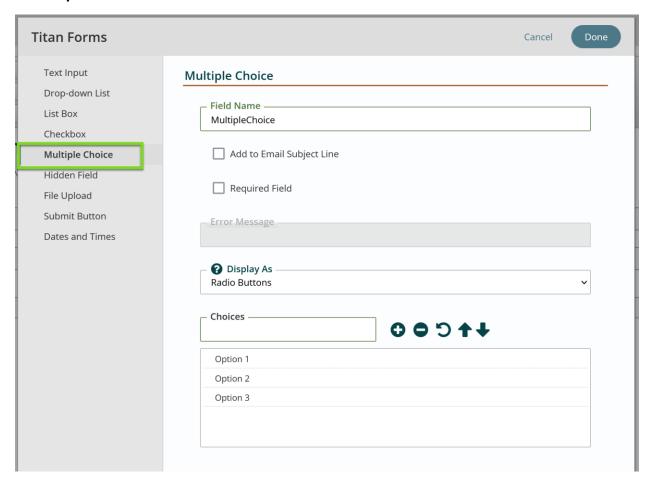
1. Click the Titan Forms Icon in the WYSIWYG tool. The Text Box template will display. (Note: this is for a single text box only. If you are looking to create a form field with



multiple check boxes for one question, you will need a Multiple Choice field, with check boxes selected as the style option.)

- 2. Select Check Box from the left navigation list.
- 3. Enter the Check Box information.
- 4. Select Done to add Check Box to form or Cancel. The Form's Content screen will display.
- 5. Click Save or Publish from the App Ribbon.

Multiple Choice Field

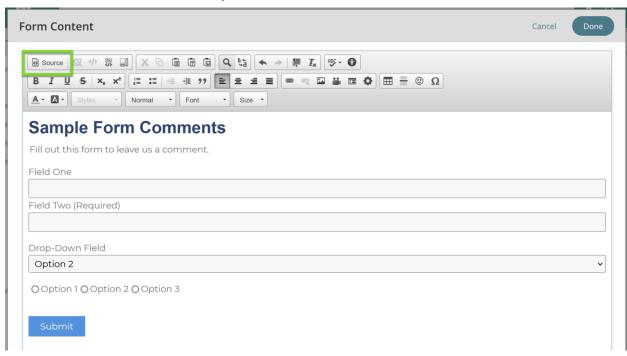


Add a Multiple Choice Field

- 1. Click the Titan Forms Icon in the WYSIWYG tool. The Text Box template will display
- 2. Click on Multiple Choice in the left navigation list.

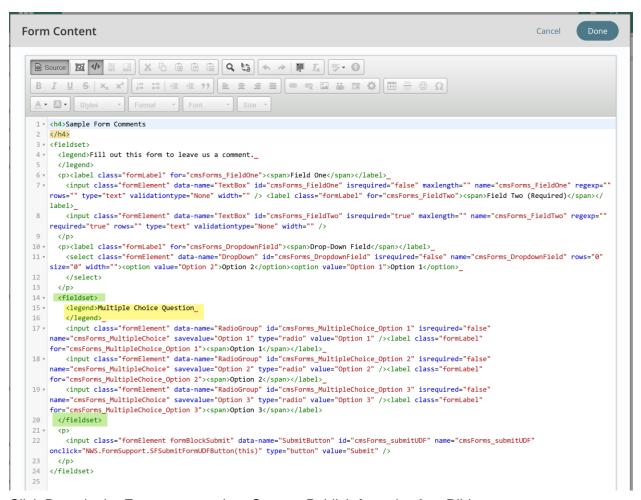


- 3. Enter the field name and select the checkboxes if relevant.
- 4. Choose how you would like the options to appear from the Display As drop-down menu. You can display options as radio buttons or check boxes.
- 5. Enter the options into the Choices field, hitting + after each option. If you would like to rearrange the list, click on an option and hit the up or down arrow. Hit the button to delete an option.
- 6. Select Done. The Form's content screen will display.
- 7. Go into the source code. At the moment, text for multiple choice options has to be entered outside of the form editor, either in the WYSIWYG editor or in the source code



8. Add <fieldset> </fieldset> around the multiple choice options, and add in the text of the question as a legend.

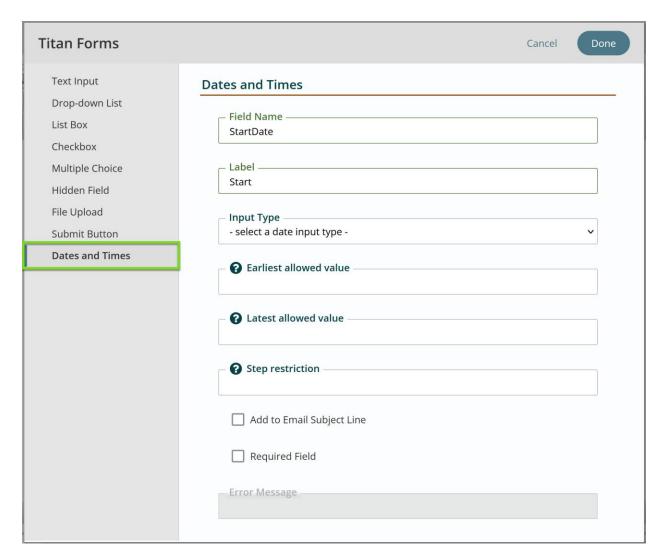




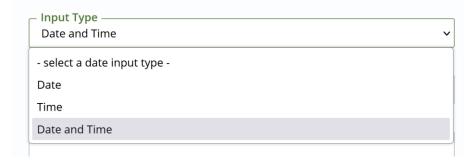
9. Click Done in the Form content, then Save or Publish from the App Ribbon.

Date and Time Field





- 1. Click the Titan Forms Icon in the WYSIWYG tool and select Dates and Times.
- 2. Enter a field name and label.
- 3. Select Date, Time, or Date and Time from the dropdown menu under Input Type.

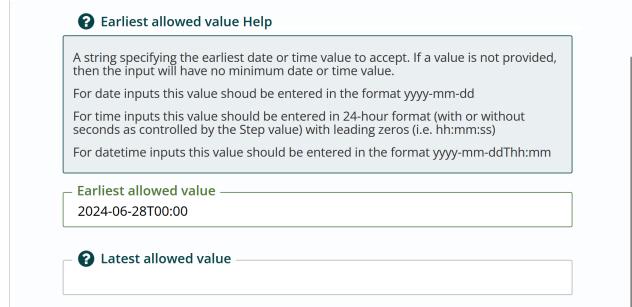




4. The date and/or time picker will be the default style of whatever browser it is viewed on.

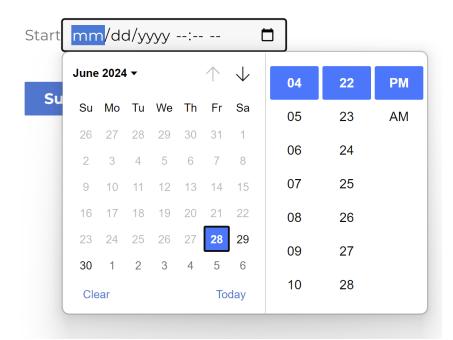


5. If desired, select an earliest and/or latest allowed value – a date or time before or after which dates or times cannot be selected. Format dates as yyy-mm-dd, time in a 24 hour format as hh:mm:ss, and datetime as yyyy-mm-ddThh:mm

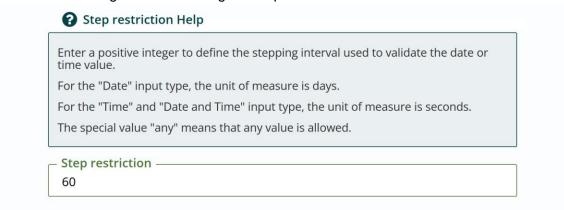


6. Dates before earliest allowed value or latest allowed value will be greyed out.





- 7. Is there a way to make it today, as in always the day it's viewed on?
- 8. If desired, enter a Step restriction. This is the amount the date or time will go up or down by if the user is using arrows to change the input.

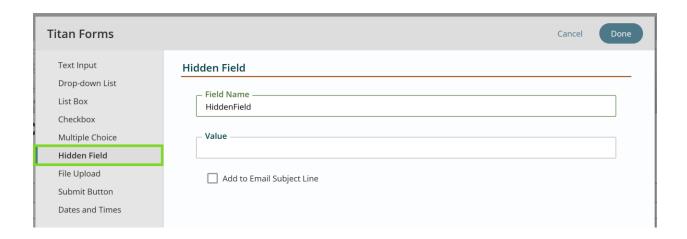


9. Click Done in the Forms Editor, then Save or Publish from the App Ribbon.

Hidden Field

With the use of a special script, hidden fields of information may be passed to a 3rd party website (user doesn't see). The Hidden Field uses the OnLoad Function field in the Forms Editor block with a special script created by developer. Contact your Titan Administrator for assistance.

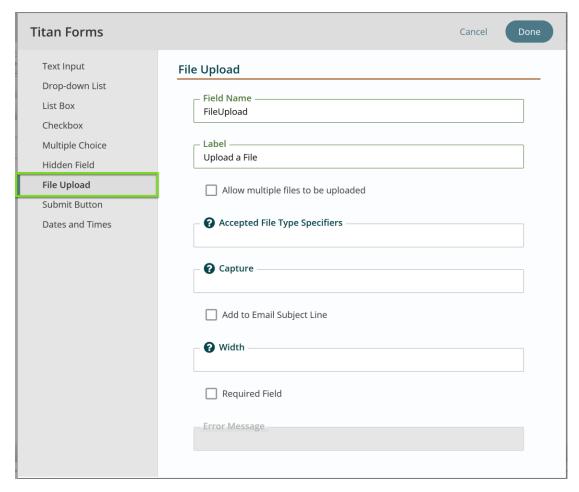




File Upload Field

The File Submit Titan Form field allows a user to upload a file through your form on your website.





- 1. Click the Titan Forms Icon in the WYSIWYG tool and select the File Upload option.
- 2. Enter the field name, label, and any other fields as necessary.
- 3. Accepted File Type Specifiers allows you to restrict what types of files a user can upload. Specify the file extensions in a comma-separated list, or enter a class of files by using the file type category and "/*". For example image/*



Accepted File Type Specifiers Help

This controls the file types a user is allowed to select. Specify a comma-separated list of unique file type specifiers.

Examples of file type specifiers include:

- Valid case-insensitive filename extensions, including the period (".") character. For example: .jpg, .pdf, or .doc
- Valid MIME type string, with no extensions
- The string audio/* meaning "any audio file"
- The string video/* meaning "any video file"
- The string image/* meaning "any image file"

Accepted File Type Specifiers image/*

4. Capture Help will activate the user's device to record audio, video, or images. Enter "user" to launch the user-facing camera or microphone, or "environment" to launch the outward-facing camera or microphone.

? Capture Help

This optional value specifies that a new file should be captured, and which device should be used to capture that new file. This works in connection with the media types configured in the Accepted File Type Specifiers field.

Supported values are "user" and "environment".

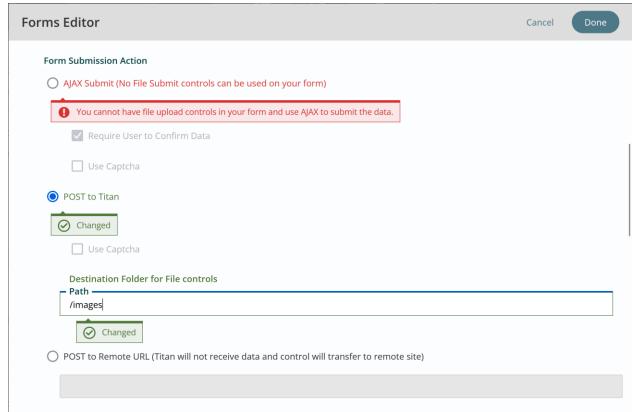
- "user" refers to the user-facing camera and/or microphone
- "environment" refers to the outward-facing camera and/or microphone

The support for capturing media is limited to mobile device browsers. In addition, the implementation of "user" versus "environment" may vary across device and browser versions. Desktop computers will likely give a standard file picker.

• Capture			
user			



5. Forms with a file upload field cannot use AJAX Submit. Under Form Submission Action, select either POST to TitSan or POST to Remote URL.



- 6. If you have chosen POST to Titan, you must manually type in the destination path for uploaded files.
- 7. Hit Done in the Forms Editor, then click Save or Publish from the App Ribbon.

Saving and Adding Forms With the Content Library

The easiest way to create a form that is stylistically consistent with the rest of the site is to open a saved form block from the Content Library.

Saving a Form

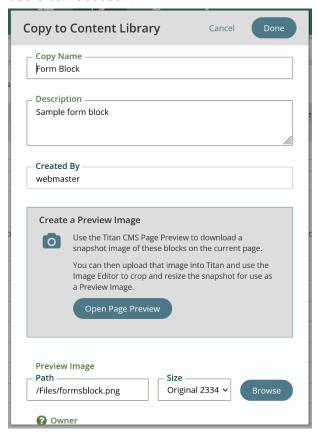
If similar forms will be used elsewhere on the site, save a completed form block to the Content Library.



1. With the block selected, click the copy block/s icon from the page tool bar.



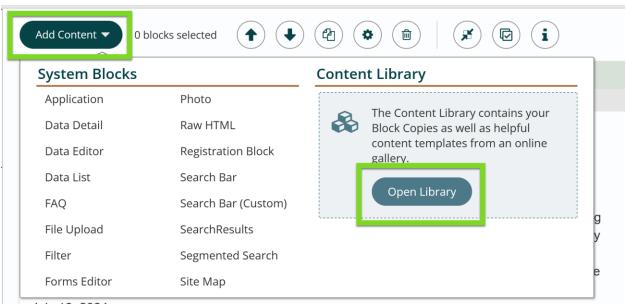
Save the form with a descriptive name and a preview image. If it is saved as a personal block, only the logged in user will be able to see it. If it is saved as a global block, all users can access it.



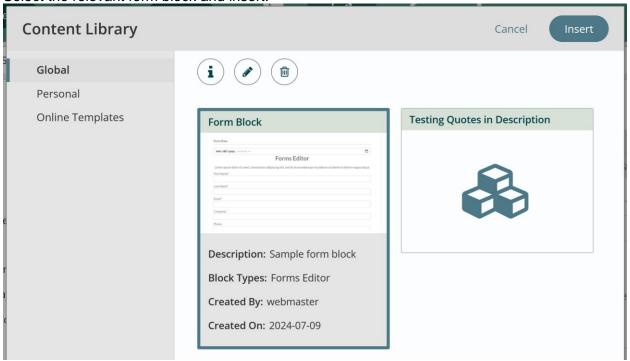
Adding a Saved Form

 With the desired page open, click the "Add Content" button in the top left corner of the page content area. Depending on you screen size, you will see the Content Library menu either to the right of or below the System Blocks menu.





2. Select the relevant form block and insert.



3. Double click on the form field and edit it according to your needs. See further form documentation for details on specific changes and form field types.

Field Labels



LADE	DECORPTION // IOE
LABEL	DESCRIPTION/USE
Field Name	This is the name that is used in the database and on the spreadsheet report. Use a name that will represent the question, title, or label that you have added in your content.
Add to Email Subject Line	If this is checked, the field name(s) for any selected fields built on the form will be added to email subject line.
CSS Class	The default value is automatically selected. You can change value if other CSS classes are listed in drop down.
Width	This is the setting for your field's width.
Rows	This is the setting to allow for 1 or more rows within your text field.
Allow Multiple Selection	When checked, this setting will allow someone to select more than 1 value in your box.
Required Field	Check this box if your field will be required on your form.
Error Message	When the user doesn't fill out the field, this message will advise that this field is required.
Display Value	This is the value that will display on the website. This entry may include spaces.
Database Value	The value that will be assigned to the Display Value entered above and will be stored in the database. Spaces are not allowed.
Add As New	This is the function button to add your entered Display Value in the list. When using a Drop Down or List Box, make your first entry "no selection" or "none" to force user to select from list.
Update Selection	This is the function button to change your selected Display Value and Database Value. When you click on the Display Value in the list, it will be highlighted, and the function buttons Update Selection and Delete Selection will be enabled. Make your change and click Update Selection.
Delete Selection	This is the function button to delete your selected Display Value and Database Value. When you click on the Display Value in list, it will be highlighted, and the function buttons Update Selection and Delete Selection will become enabled. Click on Delete Selection.
Move Up	This is the function link to move your Display Value up in the list. When you click on the Display Value in the list, it will be highlighted. Click on the link for Move Up and Display Value will move one place up. Continue clicking Move Up until it is in the desired location.
Move Down	This is the function link to move your Display Value down in the list. When you click on the Display Value in the list, it will be highlighted. Click on link



LABEL	DESCRIPTION/USE
	for Move Down and Display Value will move one place down. Continue clicking Move Down until it is in the desired location.