Forms Builder

Request access to the Forms Builder

Please email ITServiceDesk@rhul.ac.uk to request access to the Forms Builder.

Building a form

In the Forms folder click on your subfolder and select 'Create New Content'. Give your form a name and click 'Edit the newly created form'.

You will see a toolbox on the left that contains all the available field types and on the right-hand side is where you build your form.

Add a Field

Drag a field type from the left-hand toolbox into the right-hand area. You should now see your form element in the right-hand pane.

Field Settings

Each field has settings such as validation, instructions etc.; these can be accessed by clicking on the form element in the right-hand pane, the left-hand toolbox will switch to show the field settings (or click on the 'Field Settings' tab). Most of the field settings are self-explanatory but if in doubt you can click the ? next to each setting for a more comprehensive explanation of what each field does.

If you're not happy with the order of your form try re-ordering the fields by dragging them around in the right hand pane.

Form Settings

Once you are happy with you form you can then set-up the notification/confirmation options. These can be accessed by clicking the 'Form Settings' tab at the top of the toolbox. There are two options for a confirmation message, you can either type a message (including HTML if you want) or you can redirect to a URL (you will need to set up a separate webpage in this case).

In addition you can also send out an email message to the user who completed the form, simply select 'Send confirmation email to user', select an email field and then enter a confirmation message. You can also choose to send the user a copy of their form post in the email.

Another really useful setting is the notification setting, if you want a number of users to be notified when a user makes a form post you can enter their email addresses into the 'Notification Options - Send To' field and they will be notified straight away about a form post. They will receive a pre-formatted HTML email that contains the post data and a link to mark the form post as read.

Previewing your form

When you save and preview your form you will be able to post submissions to check that you are happy with how it works.

Embedding your form in a web page

To embed a form into a web page, edit the web page you want to embed the form into and drag the form from the tree into the page.

Viewing form posts

Every form response is stored in a database and can be accessed from the top toolbar.

Click on the form posts viewer icon in the topbar to view a list of all your forms.

Against each form you can see the title, where the form is stored, the number of posts (read and unread) and when the last post was made. If a form has posts then you can choose to export the posts to CSV, which will export to an Excel spreadsheet. You will then be able to import the data into other applications. You can also click 'View posts' to see the individual posts.

Each post has a 'read/unread' flag, the idea is that once a form response has been actioned it can be marked as 'read'. This can be done form the form posts listing screen, the form post detail screen or the notification email.

All actions, such as deleting a form response, marking a form response to read or unread or even updating the form itself, are stored in the audit trail, this can be accessed in the normal way by clicking on the form in the navigator and selecting 'Audit Trail' or using the 'Audit Trail' ink listed next to each form in the form response viewer.

Form rule builder – Multiple-page forms

The Form Rule Builder allows you to build complex forms all in one place. Page Rules allow you to jump to specific pages based on actions that the user performs on form fields.

How page rules work

Page Rules are made up of a condition and an action. On a multi-page form you can have users jump from page one to page five and from page five to page two. So you need to be careful when creating Page Rules that you don't make it impossible to complete the form.

Each rule is determined by a Subject, Comparison and a Value.

- Subject - this is the field that drives the rule
- Comparison - this is how you want to evaluate the Subject's Value to make the condition true
- Value - this is the choice or data the user must select or type into the form to make the condition true

Each type of field has the following comparisons:

- Number - is equal to, is greater than, is less than
- Checkbox, Dropdown, Radio - is, is not
- Email, Multiline, Phone, Textbox, Website - is, is not, contains, does not contain, begins with, ends with

Page rule builder

The page rules builder is accessed from the Form Setting tab in the form builder. You'll see a button called Edit Page Rules as below:
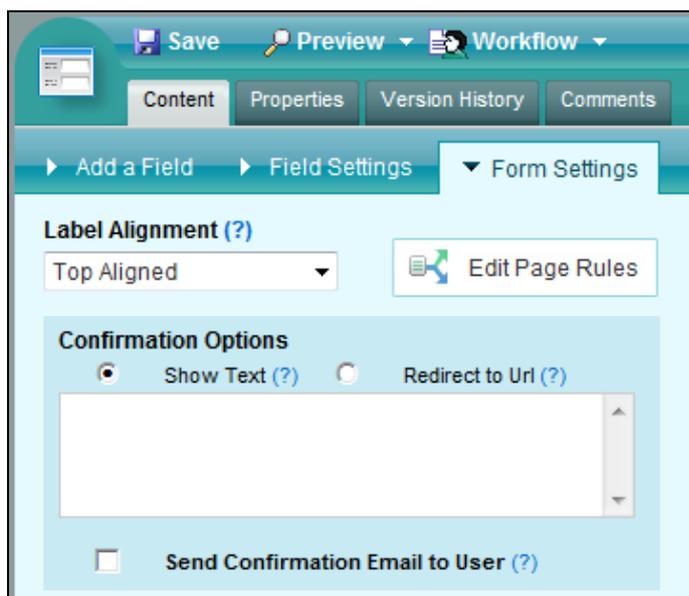
When you click the button you're directed to the Page Rule Builder:
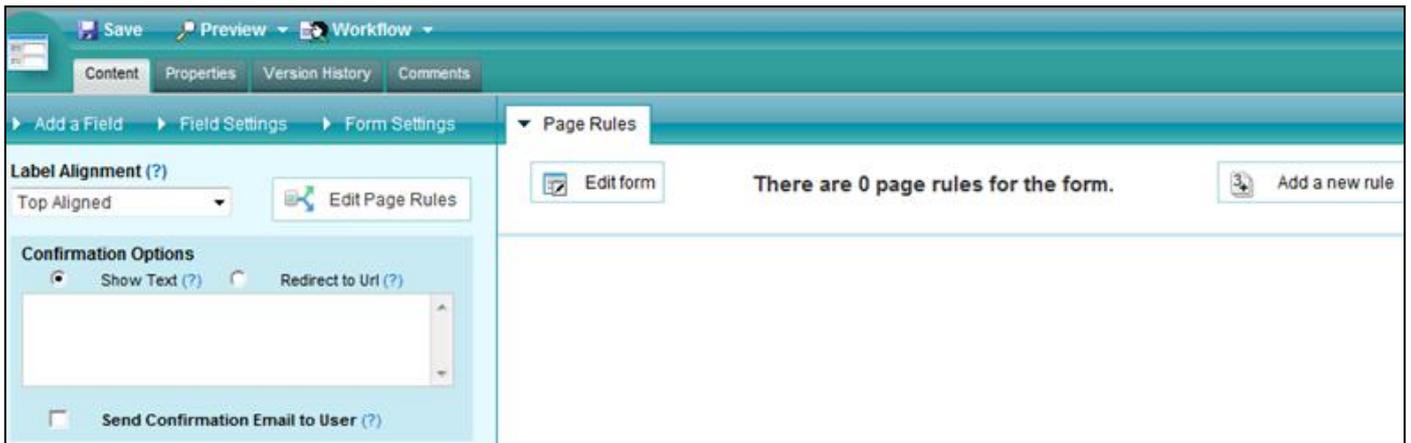
You can return to the Form Builder by clicking the Edit Form button in the Page Rule Builder or by clicking any of the tabs in the Form Builder (Add a Field, Field Settings, Form Settings). At this point if you click the Add a new rule button and you don't have more than one page in your form, you'll see a message instructing you to add some pages to the form.

Once there are some pages within the form you can begin to build page rules. After clicking the Add a new rule button you'll see the page rule form:
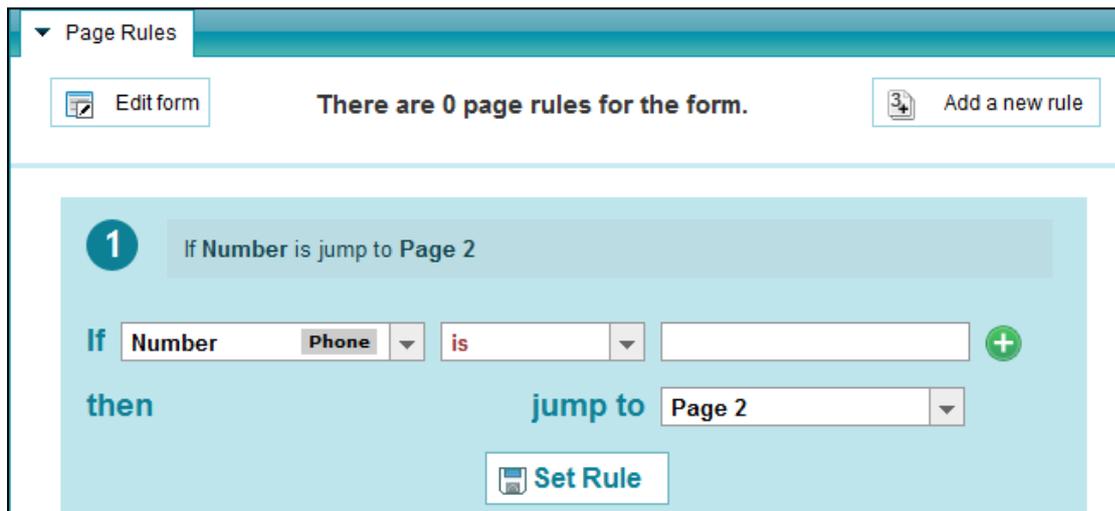
At the top of the rule builder the rule is defined as a sentence. This is to help you quickly see the rule logic, which helps if the rule is complex. The sentence is updated in real time as you build the rule.

In the case above the Subject is the field called 'Number', the Comparison is 'is' and the Value is empty. The Subject will always show the type of field, in this case it is a Phone field.

When you click on the Subject dropdown it shows you a list all of your form fields to which page rules can be applied, separated by pages so it's easy to understand. When you select one from the list the Comparison choices and the Value will change, depending on the type of field you have selected.

You can add more than one condition to a rule by clicking the green plus icon which adds an AND/OR clause followed by a new condition as below:

You can delete the condition by clicking the red delete icon.

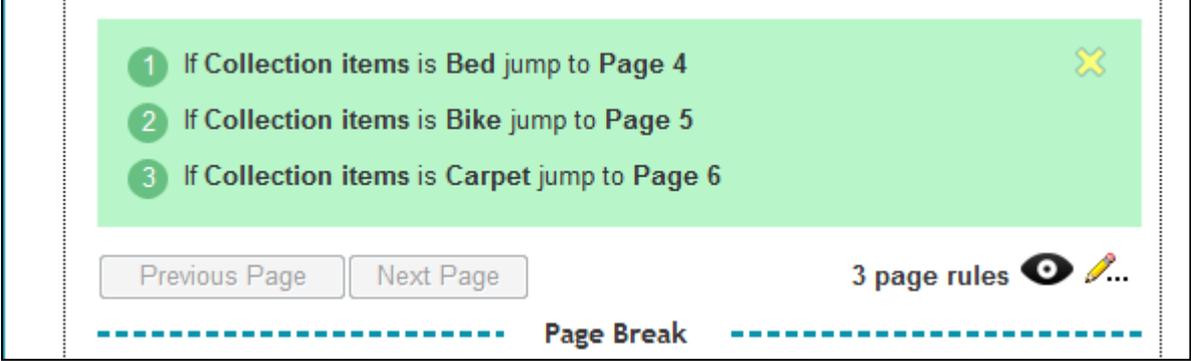Clicking Set Rule will close the form and display a list of rules which you can duplicate, edit, or delete:

Viewing page rules in the form builder

Once a Page Rule has been set any rules will be visible in the Form Builder on the relevant Page field. This allows you to simply check any current rule logic while you build your form.

The display shows the number of Page Rules on the page as well as eye and pencil icons. Clicking the pencil icon will take you to the Page Rule Builder screen which shows the full list of rules. To view the rules as sentences within the Form Builder, click the eye icon. To close them simply click the yellow cross icon.