Kentico Content Management System (CMS)

Forms

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I. Introduction

With Kentico Forms, you can easily create and publish on-line forms without programming. Create a form in a matter of minutes, place it on your page and collect contact details or any other information (Fig. 1).

Fig. 1. Sample of a Kentico Form

II. Login to Kentico CMS Desk

Note: Only Users who have explicitly received permission can access Kentico

- Type https://www.gc.cuny.edu/cmsdesk (no www is needed) in either Internet Explorer or Firefox browser.
- Log in using your gc\username and password (what you use to login to computers) (Fig. 1)

Once you successfully login, the Kentico CMS Welcome page appears in your browser (Fig. 3).

To Access the Desktop (with pages) simply click on the Pages icon in the welcome screen or click on the flower icon in the upper left corner. This will open the tool bar and from here you can also access the Pages (Fig. 3).

After click on Pages you will see the Desktop (Fig. 4)

If you are unable to login, please contact the IT Services at (212) 817-7300 or via e-mail at itservices@gc.cuny.edu.

To log out, please close the browser to end your session.
III. Creating a New Form

1. The New Form Command

The CMS Desk Tools menu includes the Forms button (displays a list of forms), the New Form button (opens a new form) and the Add a New Form link (also opens a new form), allowing you to create and manage online forms. You may choose to create a new form or clone a pre-existing one. In addition, you may perform other actions such as editing, deleting, backing up and restoring forms.

2. Create a New Form

a) Click the Tools menu (Fig. 2).

b) Click the Add a new form link (Fig. 2).

(Alternatively, you can also click the Forms button, and then click the New Form button (Fig. 3).

c) Enter the name of the form in the Form display name: field (Fig. 4)

d) Click the Save button.

e) Your form will appear in the list of forms (Fig. 5).
3. Description of Form Fields on General Tab

- **Form Display Name** – this is the name that will be shown in the CMS (see figure 2) for identification and can be anything you desire.
- **Form Code Name** – this is the reference name used for coding purposes. It should always be prefixed with: CUNY_GC_BIZFORM_ and then concluded with a short name representative of your form (spaces should be replaced with underscores '_'). This value CANNOT be changed once it has been set, therefore it should be done carefully. (see figure 4)
- **Table Name** – similar to **Form Code Name**, this is used for coding purposes. It should match what was entered in **Form Code Name**. This value CANNOT be changed once it has been set, therefore it should be done carefully.
- **Form Settings** – Provides the option of displaying text, redirecting to a website, resetting to an empty form or allow for continued editing.
- **Submit Button text** – By default, the button text displays as “OK”. You can change this to another label such as “Submit”.

IV. Cloning Pre-Existing Forms

A form that is already created and listed may contain the type of fields and format that you need. Instead of starting from scratch, you can clone that pre-existing form.

a) **Click the Tools menu, and then click the Form button.** A list of existing forms will display (Fig. 6).

b) **Right-click in the Actions column next to the desired form and then select the Clone option (Fig. 7).**
   (You can also click the drop-down arrow in the Actions column next to the desired form.)

c) **The Clone Form window will appear (Fig. 8).** You may enter a different name in the New object display name: field. You may choose to uncheck the Clone form data option if you wish to start fresh with new data.

d) **Click the Clone button in the Clone Form window.** The duplicate form will be created and then listed in the Form list.
V. Form Properties

After you have named your new form and saved it, the Forms Properties window will display (Fig. 10). You can always access the Form Properties window for a form by clicking on the Edit pencil button next to it in the Action column in the Form list (Fig. 9).

Several menu tabs are available which allow you to determine how the form will appear and behave. (Some are more important than others). Below, you will find a description for each one.

1. Menu Tabs

   - Data
   - General
   - Fields
   - Form
   - Notification e-mail
   - Autoresponder
   - Security
   - Alternative forms

   **Data** – This tab will show you all the results that have been collected from people submitting through the form in question (Fig. 11). You can also manually create/edit records from here as well as export them to Microsoft Excel.
• **General** – This tab allows you to set the display name of the form (note that the code name and table name cannot be changed once they are set). You can also set the action to be taken once a form is submitted successfully and if you want a different text to appear for the button used to submit the form. By default, the button uses the word ‘OK’ but it’s recommended to make this ‘Submit’ in order to be consistent throughout the site (see Fig. 10).

• **Fields** – This tab is where you build out all the fields that you want to make available to your user. More details are provided further below regarding options and best practices.

• **Form** – This tab allows you to create a custom display layout for your form to the user. This is generally not recommended to be used unless you have a very in-depth understanding of HTML and CSS as you may break the site template. If you choose to use this option, you are using it at your own risk as there is no support available. By default, the form is laid out in a 2 column fashion (see figure 8).

• **Notification e-mail** – This tab allows you to send the contents of the form (after a successful submission) to one or more recipients. This is less useful with the ability to export the data into Excel (as noted in the DATA tab mentioned above). Use of this function also allows you to style the layout of the delivered email. As with any of the custom layouts, this is generally not recommended as it may require in-depth knowledge of HTML and CSS.

• **Autoresponder** – This tab allows you to send an auto-response via email to any individual who has successfully completed your form. In order for this to work however, you MUST provide an email address field within your form (please see section B below titled: More about the Fields Menu Tab). This field will enable the form to capture and validate the email addresses of those using your form. You may customize the auto-response message with text, attachments and any of the data submitted (Fig. 13).

To do so, you must click on the **Confirmation e-mail source field drop-down list** and select the same email address field you created on the Fields tab. The auto-response window will expand to include a message field and attachment section.

![Fig. 16. Autoresponder tab with Email field selected](image)

![Fig. 17. Custom auto-response message](image)

• **Security** – This tab allows you to lock down the management of your form to a particular role (group). This is very useful to prevent unauthorized users from editing or viewing your form and its data. If you decide to use it, only
roles that are prefixed with an underscore (\_) should be used. All other roles may change. If you do not see a role, send an inquiry to the ITservices@gc.cuny.edu. All role requests will be thoroughly reviewed before acted on.

- **Alternative Forms** – This tab is not recommended to be used and should be ignored. If you choose to use this option, you are using it at your own risk as there is no support available.

2. **More about the Fields Menu Tab**

   a)  **Adding Fields**
   The Fields menu tab allows you to add appropriate fields to your form. Each field has its own properties, some of which can be adjusted. When you add a new field, the name of the field displays on the left in an ordered list, while its properties display on the right (Fig. 14).

   ![Fields menu tab in the Form Properties window](image)

   **Fig. 18. Fields menu tab in the Form Properties window**

   b)  **Adding Categories**
   You can also create categories. Categories function as section dividers, allowing you to display related fields in a group. For example: an “Address” category would include fields such as “Street”, “City”, “State” and “Zip Code.” You can use the green Up and Down arrows to rearrange the order of the fields listed. This is important because the fields will be published in the same order in which they are listed. Therefore you would order the list of fields and categories in such a manner that **each category is listed above its related fields**.

   c)  **Field Properties**
   - **Column Name** – name of the field for the database. Standard practice is to name this following the field caption being used. It should be noted however that spaces are not permitted; underscores (\_) are generally recommended as a replacement (see figure 11).
General

- **Show on Public Form** – this allows you to choose to display a field or not on the public form display. Not displaying a field allows you to use the field directly via the DATA Tab to record comments or notes as needed.
- **Field Caption** – this is the name of the field that will be displayed to the user on the form. (see Appendix A for common naming conventions). Required fields be prefixed with an asterisk (e.g. First Name *)
- **Field Type** – this determines the type of entry method that the user will be faced with (see Appendix B for details on field types). The most common type used is the textbox and text area.
- **Maximum Length** – limit the amount of text that can be entered to conserve system resources in the database, does NOT affect user entry limits
- **Allow Empty Value** – determines whether or not a field is required; the default (unchecked) is required
- **Default Value** – allows you to set a default value that will be returned should the user not enter any value of his or her own.

Field appearance

- **Field Caption** – this is the name of the field that will be displayed to the user on the form. (see Appendix A for common naming conventions). Required fields be prefixed with an asterisk (e.g. First Name *)
- **Field Type** – this determines the type of entry method that the user will be faced with (see Appendix B for details on field types). The most common type used is the textbox and text area.
- **Maximum Length** – limit the amount of text that can be entered to conserve system resources in the database, does NOT affect user entry limits
- **Allow Empty Value** – determines whether or not a field is required; the default (unchecked) is required
- **Default Value** – allows you to set a default value that will be returned should the user not enter any value of his or her own.

Advanced Properties – There are numerous advanced properties available and are dependent upon the Field Type that you choose to utilize (Fig. 16). While the most important fields are described below, others that are not mentioned can be left at their default values.

- **Attribute Name** – Same as Column Name in basic mode
- **Attribute Size** – Same as Maximum Length in basic mode
- **Validation: Regular Expressions** – a series of ‘codes’ that are used to validate structured data such as phone number fields, email addresses, zip codes and other standardized formats (see Appendix A for some commonly used options)
- **Validation: Min Length** – ensures that the user must enter a minimum number of characters in the field
- **Validation: Max Length** – ensures that the user can only enter a maximum number of characters in the field
- **Validation: Error Message** – message displayed to the user if the data entered does not meet validation checks (Fig. 21).
3. Implementing your Form

Once your form has been designed, you will need to implement it on a webpage in order to be able to preview it and to test it. In order to do this, you need to utilize a widget called “Form (on-line forms)”.

VI. Appendix A – Standard Field Caption Names w/ Regular Expressions

<table>
<thead>
<tr>
<th>Recommended Field Names</th>
<th>Recommended Field Size</th>
<th>Regular Expressions (if any)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>25</td>
<td></td>
<td>Always recommended to split up the first and last name into 2 separate fields</td>
</tr>
<tr>
<td>Email</td>
<td>50</td>
<td>^([0-9a-zA-Z][.-\w]<em>[0-9a-zA-Z]@[0-9a-zA-Z][-\w]</em>[0-9a-zA-Z].+)$</td>
<td>Choose the Field Type ‘E-mail’ or use: ^([0-9a-zA-Z][.-\w]+[0-9a-zA-Z]@[0-9a-zA-Z][-\w]*[0-9a-zA-Z].+)$</td>
</tr>
<tr>
<td>Phone; Office Phone; Home Phone; etc…</td>
<td>12 (for the format xxx-xxx-xxxxx)</td>
<td>^([0-9]{3})[-]([0-9]{3})[-]([0-9]{4})$</td>
<td></td>
</tr>
<tr>
<td>Address – Line 1</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address – Line 2</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zip Code</td>
<td>10</td>
<td>^\d{5}[^\d-]{4}$</td>
<td></td>
</tr>
</tbody>
</table>
VII. Appendix B – Field Types

![Image of field types]

Fig. 22. List of field types

1. Description of field types and recommended usage:

- **Text box** – commonly used for single line values such as name or address inquiries
- **Text area** – commonly used for open-ended questions requiring a large feedback space
- **Drop-down list** – commonly used to present any number of choices (2 or more) to select from with only one possible value returned
- **Radio buttons** – commonly used to present a small number of choices to the user (between 2 and 10) to select from with only one possible value returned
- **List box** – commonly used to present any number of choices (generally 2 or more) to select from, however unlike the drop-down, this allows you to return more than one possible value
- **Country Selector** – Creates a pre-populated list of countries to choose from
- **E-mail** – creates a textbox with email validation code pre-built-in.
- **International Phone Number** – implements a pre-formatted International Phone number entry field
- **Security Code** – implements a captcha system to deter bots from auto-populating your form
- **U.S. phone number** – implements a pre-formatted US phone entry field
- **U.S. ZIP code** – implements a pre-formatted US Zip code entry field

VIII. How to Get Help

If you do not find answers to your questions in the Kentico documentation, please contact the IT Services or view Kentico resources page.

Phone: (212) 817-7300
Email: ITservices@gc.cuny.edu

Walk-up desk no longer available