How-to: SharePoint Web Forms

Contents

Overview: ............................................................................................................................................................... 3
Create Web Form Site ..................................................................................................................................... 3
Web Form Components: ................................................................................................................................ 4
  Web Form page ........................................................................................................................................... 4
  Confirmation page ...................................................................................................................................... 5
  Responses list: .............................................................................................................................................. 6
  Views: ............................................................................................................................................................ 6
Form design ...................................................................................................................................................... 7
Web Form input fields: ................................................................................................................................... 7
Manage the Web Form View .........................................................................................................................9
  Name ...........................................................................................................................................................10
  Columns ......................................................................................................................................................10
  Other options .............................................................................................................................................11
  Add a column to a list. ...............................................................................................................................12
  Adding a column .......................................................................................................................................12
  Change/Edit/Delete a column ..................................................................................................................13
  1. Edit a column or field name ................................................................................................................14
  2. Add column description ......................................................................................................................14
  3. Delete a column or field name ............................................................................................................14
  Show a column ..........................................................................................................................................14
  Hide a column ............................................................................................................................................15
Create or Modify a Web Form View ..........................................................................................................15
  Create a new view ......................................................................................................................................15
  Modify view ...............................................................................................................................................17
Select another view ........................................................................................................................................18
Editing the Web Form page text ..............................................................................................................18
  Editing the Web form page ......................................................................................................................18
  Editing the title .........................................................................................................................................18
  Edit the Confirmation page text ............................................................................................................19
Managing Web Form Responses .............................................................................................................19
  Viewing List Results ..................................................................................................................................19
  Editing a record .........................................................................................................................................20
Add a row or record .................................................................................................................................20
Filter and functionality .............................................................................................................................20
Export the data to Excel ..........................................................................................................................20
Add Notifications ......................................................................................................................................21
OVERVIEW:
With a form, you can collect names for an upcoming event, attendees at a meeting or collect requests for information.

Need: Website owners usually need to collect information from their visitors using a web form. Web forms are pages in a website with fields that allow a visitor to enter information. This information is usually saved in a database. Common uses for web forms include visitor feedback, event registration, requesting information, etc.

Solution: University Web Services created a SharePoint template that provides web site owners with an easy way to create web forms, customize information collected in the form and access/export the responses. This can all be done without any programming.

CREATE WEB FORM SITE
To add a form, first add a form subsite to your existing MOSS site.

1. Navigate to the appropriate location within your existing site.
2. From the Site Actions menu, choose Create Site.

3. Name the site—Title and URL name.
4. Select “Web Forms” from the template selection.

5. Select “Ok” to create the new site.
6. You should see the default web form page.
WEB FORM COMPONENTS:

The MOSS Web Forms site is provisioned with two pages and a list (like a database table). Detailed below are components and concepts you’ll need to know about.

Web Form page

In the Pages folder of the Web Forms site you created above, you’ll notice that the default page or welcome page for the Web forms site is the Web form page. This is the page you will edit--select the form fields needed, add text and images if applicable. The data collected from the Web form page is stored as individual records in the Responses lists (discussed below.)
This is an example of a completed Web form page.

**Confirmation page**

The confirmation page is provisioned when the Web form site is created. This page is automatically sent to the respondent upon the action of the submit button. Make sure you edit this page updating the content to reflect your department, contact information and confirmation message.

This is a copy of the confirmation page before changes have been made. Please don’t make the mistake of not editing the confirmation page so that the respondent would receive this generic message.
WEB FORM PAGE

Responses list:
A list is like a database table that collects data responses. So for instance, when Joe responds to a survey, his responses are contained in one record or row in a database table. Each individual response to a question is a column or field. For every Web form, you would have a responses list.

You’ll notice the Responses list is represented by a table-like icon. It is listed below the Pages folder as shown here.

Based on the fields you have used to build a form, the data is displayed in the list as a row with columns.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Company</th>
<th>Business Phone</th>
<th>Home Phone</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>bolivar</td>
<td>Scott</td>
<td></td>
<td></td>
<td></td>
<td><a href="mailto:scott@home.1.com">scott@home.1.com</a></td>
</tr>
<tr>
<td>bolivar</td>
<td>Scott</td>
<td></td>
<td></td>
<td></td>
<td><a href="mailto:scott@home.2.com">scott@home.2.com</a></td>
</tr>
<tr>
<td>marvin</td>
<td>Carol</td>
<td>TestCo</td>
<td>503-555-5555</td>
<td>908 home of your leisure</td>
<td><a href="mailto:carol@home.edu">carol@home.edu</a></td>
</tr>
<tr>
<td>testor</td>
<td>Willie</td>
<td>TestCo</td>
<td>803-555-5555</td>
<td>908 home of your leisure</td>
<td>willie@<a href="mailto:testor@home.100.com">testor@home.100.com</a></td>
</tr>
</tbody>
</table>

The data in the list can be exported to a spreadsheet for analysis. Or the data can be displayed in a view. This concept will be discussed below.

Views:
Different views of the same list can be created to display data. Contents of the actual list do not change, but the items are organized or filtered so that the most important or interesting information data is displayed depending on the need. Views use columns to sort, group, filter, and display the data. You can also select how many items are displayed at one time in each view. For example, people can browse a list in sets of 25 or 100 list items per page, depending on individual preference and the speed of network connection.

Views allow flexibility to store a large number of items in a list, but to see only the subsets that are valuable at a particular time. For instance, only the individuals registered for a particular training session, or on a specific date. Personal views are available only to you, and if you have permission to modify a list, you can create public views that are available to everyone.
FORM DESIGN
Design your form before you get to MOSS—know what information you need to collect. For instance, show below is “New Feature Form” before being built in the MOSS form tool.

WEB FORM INPUT FIELDS:
1. From the Manage Content and Structure view, select the forms site.
   - Web Form Site
   - Documents
   - Images
   - Pages
   - Responses
   - Workflow Tasks
2. Open (Open Link in New Window) the default forms page (default)

3. From the Site Actions menu, choose **Edit page**

4. You'll notice that you have a couple choices regarding editing the form

   - Change Your Form's View (drop-down list)
   - Change View (selection button)
   - Manage Your List's Views

5. Select the form view. All views created will be displayed here with the two default views.

   - All contacts
   - Basic Inquiry Form

The “All contacts form (shown below) lists fields that you would use to collect contact information. The “Basic Inquiry Form” is typically the view you would select because it contains more of the basic fields used to collect data.
**Note:** When you change a view, it must be published before views will see with anonymous access.

6. Unless the “All contacts” form works for you, choose the “Basic Inquiry Form.” Click on the “Change View” button to see the different view.

**MANAGE THE WEB FORM VIEW**

Views make it easy to see information. You can have more than one view for a list so that you can display data differently. For instance, instead of applying the same filter every time you go to a particular list, you can create a view that includes the filter. Custom views can do one or more of the following:

- Filter by a set of criteria
- Sort in a particular order
- Hide or show columns
- Group information based on list data
- Display subtotals of columns
- Show lists with date information as calendars or tables

You can make this new view the default public view, so that when visitors go to a page that display a list, the filtered information will be displayed automatically.

1. Edit the forms page and select “Manage Your List’s Views”

2. The Customize Responses menu opens. You’ll notice the menu is divided into the following sections:

   - List Information—List URL location
   - General Settings—Settings associated to the list
   - Columns—A field is a column or attribute of information that a user can add to a list.
   - Views—Custom and default way to display data
Notice the two views listed—“All contacts” and “Basic Inquiry Form.” The view that is currently the default view will be indicated.

3. Click on the view name you choose above (Basic Inquiry Form) to change the selected fields or the field order.

4. The Edit View: Responses screen opens. We’ll look at this menu by section.

**Name**

1. View Name--rename the view. Here you can change the name to match the data so you’ll have a more recognizable name in the view list instead of Basic Inquiry Form.

2. Check the selection box to “Make this the default view.”

**Columns**

3. Choose the columns (fields) that you want to display in this view. Renumber the columns based on the form design. Notice the fields that are displayed correspond with the previous screen in the “columns” section.
Other options

The following variables are available in the Edit View menu affecting how the data is displayed/viewed. Simply click on the plus sign to expand the menu and make menu choices.

4. In the Sort section, choose whether and how you want the list items to be sorted. You can use two columns for the sort, such as first by last name and then by first name.

5. In the Filter section, choose whether and how you want to filter the list items. A filtered view shows you a smaller selection of the list, such as only items that were created by a specific department or with an approved status.

6. In the Group By section, you can group items with the same value in their own section, such as an expandable section for documents by a specific author.

7. In the Totals section, you can count the number of items in a column, such as the total number of issues. In some cases, you can summarize or distill additional information, such as averages.

8. In the Style section, select the style that you want for the view, such as a shaded list in which every other row is shaded.

9. If your list has folders, you can create a view that doesn't include the folders—this is sometimes called a flat view. To view all of your list items at the same level, click Show all items without folders.

10. You can limit how many items can be viewed in the list, or how many items can be viewed on the same page. These settings are particularly important if you are creating a view for a mobile device. In the Item Limit section, select the options that you want.

11. If you plan to view the list on a mobile device, select the options that you want in the Mobile section.

12. Click OK.
Add a column to a list

Information in lists is stored in columns, such as Title, Last Name, or Company. If you need to store additional information about list items, you can add columns to help you sort, group, and create multiple views of your list. For example, you can sort a list by due date or group the items by department name.

You have several options for the type of column that you create, including a single line of text, a drop-down list of options, a number that is calculated from other columns, or even the name and picture of a person on your site.

Note The following procedure begins from the list page for the list that you want to add the column to. If the list is not already open, click its name on the Quick Launch. If the name of your list does not appear, click View All Site Content from the Site Actions menu and then click the name of your list.

Adding a column

1. On the Settings menu, click Create Column.

2. In the “Name and Type” section, enter the name of the field--the Column name box.
CREATE OR MODIFY A WEB FORM VIEW

3. Under The type of information in this column is, select the type of information that you want to appear in the column.

4. In the Additional Column Settings section, type a description in the Description box to help people understand the purpose of the column and what data it should contain. This description is optional.

5. Depending on the type of column that you selected, more options may appear in the Additional Column Settings section. For instance, if you choose “choice” in step 3, you will list the choices (each choice on a separate line and choose how the choice is displayed—drop-down menu, radio button or checkboxes.

6. To add the column to the default view, which people on your site automatically see when they first open a list or library, click Add to default view.

7. Click OK.

Keep in mind that columns added after data has been collected will be blank in existing records.

**Change/Edit/Delete a column**

1. From the Settings menu, choose List Settings

2. Select the column or field, by clicking on the column name text.

The “Change Column” menu will open.

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**Responses**

Use the Contacts list for information about people that your team works with.

<table>
<thead>
<tr>
<th>New</th>
<th>Actions</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Create Column**
  - Add a column to store additional information about each item.

- **List Settings**
  - Manage settings such as permissions, columns, views, and policy.

---

**Columns**

A column stores information about each item in the list. The following columns are currently available in this list:

<table>
<thead>
<tr>
<th>Column (click to edit)</th>
<th>Type</th>
<th>Require</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio Button</td>
<td>Choice</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Single line of text</td>
<td>✔️</td>
</tr>
<tr>
<td>Last Name</td>
<td>Single line of text</td>
<td>✔️</td>
</tr>
<tr>
<td>Requestor’s name</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>E-mail</td>
<td>Email ID</td>
<td>✔️</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>Single line of text</td>
<td></td>
</tr>
</tbody>
</table>

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MOSS FORMS PAGE 13
MANAGE THE WEB FORM VIEW

1. **Edit a column or field name**
   - Change the Column name
   - Change the field type (if applicable). However, please note that changing the field type, you may lose data in existing records.

2. **Add column description**
   - Add a description in the Description box to help people understand the purpose of the column and what data it should contain

3. **Delete a column or field name**
   - To delete a column, select “Delete.” Please note, that this is irreversible. If you delete the column, all data in existing records will be lost.

   ![Change Column: Responses](image)

**Show a column**

1. If the list or library is not already open, click its name on the Quick Launch. If the name of your list or library does not appear, click View All Site Content, and then click the name of your list or library.

2. On the View menu, (upper right hand menu) click Modify this View. The View menu displays the name of the current view, such as All Documents or Subject.

![View menu](image)
3. In the Columns section, under Display, select the check box for the column that you want to show.

4. Click OK.

**Tip** You can also change the order of columns. In the Columns section, under Position from Left, click the arrow next to the number of the column’s current position, and then select the new position that you want.

**Hide a column**

1. If the list or library is not already open, click its name on the Quick Launch. If the name of your list or library does not appear, click View All Site Content, and then click the name of your list or library.

2. On the View menu, click Modify this View. The View menu displays the name of the current view, such as All Documents or Subject.

3. In the Columns section, under Display, clear the check box for the column that you want to hide.

4. Click OK.

**CREATE OR MODIFY A WEB FORM VIEW**

**Create a new view**

You can use views to see the items in a list that are most important to you or that best fit a purpose. For example, you can create views of the items that were created most recently, items that apply to a specific department, or items that were created by the same person.

When you view most lists, you can temporarily sort or filter the items by pointing to the name of a column and then clicking the arrow beside the column name. This is helpful if you need to see list items in a certain way just once in awhile, but you have to repeat the steps the next time you view the list.

If you expect to view the list in a certain way frequently, you can create a view. You can use this view any time that you work with the list. When you create a view, it is added to the View menu of a list.

Lists can have personal views and public views. Anyone can create a personal view to see the lists in a certain way or to filter for only the list items that they want to see. If you have permission to design a site, you can create a public view, which anyone viewing the list can use. You can also make a public view the default view, so that people automatically see the list in that view.

Additionally, when you design a site, you can link to different views or design pages with Web Parts (Web Part: A modular unit of information that consists of a title bar, a frame, and content. Web Parts
CREATE OR MODIFY A WEB FORM VIEW

are the basic building blocks of a Web Part Page.) that use the different views. For example, a team might want to link to a view of a list that shows only the documents that were created by their team members.

If members of your group will view a list on a mobile device, you can create mobile views that provide limits, such as number of items displayed in a view, that are optimal for the bandwidth and limitations of the devices.

1. If the list is not already open, click its name on the Quick Launch. If the name of your list does not appear, click View All Site Content, and then click the name of your list.

2. On the Settings menu, click Create View.

3. Under Choose a view format, click the type of view that you want to create. For many situations, you will want to create a Standard View, but you can choose other views for specific situations, such as when you want to create a calendar or a Gantt view.

4. In the View Name box, type a name for your view, such as Sorted by Last Name.

5. If you want to make this the default view, select the “Make this the default view” check box. You can make this the default view only if it is a public view and if you have permission to change the design of a list.
6. In the Audience section, under View Audience, select whether you want to create a personal view that only you can use or a public view that others can use.

7. In the Columns section, you can show or hide columns by selecting the appropriate check boxes. Next to the column name, enter the number for the order of your column in the view.

8. In the Sort section, choose whether and how you want the list items to be sorted. You can use two columns for the sort, such as first by last name and then by first name.

9. In the Filter section, choose whether and how you want to filter the list items. A filtered view shows you a smaller selection of the list, such as only items that were created by a specific department or with an approved status.

10. In the Group By section, you can group items with the same value in their own section, such as an expandable section for documents by a specific author.

11. In the Totals section, you can count the number of items in a column, such as the total number of issues. In some cases, you can summarize or distill additional information, such as averages.

12. In the Style section, select the style that you want for the view, such as a shaded list in which every other row is shaded.

13. If your list has folders, you can create a view that doesn't include the folders — this is sometimes called a flat view. To view all of your list items at the same level, click Show all items without folders.

14. You can limit how many items can be viewed in the list, or how many items can be viewed on the same page. These settings are particularly important if you are creating a view for a mobile device. In the Item Limit section, select the options that you want.

15. If you plan to view the list on a mobile device, select the options that you want in the Mobile section.

16. Click OK.

**Modify view**

1. Make sure the name of the view in selected in the View menu.

2. Choose “Modify this View.”

3. Make changes as needed—Add new column to view by selecting the column “Display” checkbox, change the column sort order or delete the view.
EDIT THE WEB FORM PAGE TEXT

SELECT ANOTHER VIEW
Some lists come with more than one view, and you can create additional views. If different views are available, you can switch views by using the View menu.

1. If the list is not already open, click its name on the Quick Launch.
   If the name of your list does not appear, click View All Site Content, and then click the name of your list.
2. On the View menu, click the view that you want.

Tip To make changes to the existing view, click the View menu, and then click Modify this View.

EDITING THE WEB FORM PAGE TEXT
Look in the pages folder (Manage Content and Structure) to see the names for the form page.

Editing the Web form page
1. Navigate to the Web form root site. From Site Actions, choose Edit Page.
2. Insert the headline, page subhead and the explanation form text or page content (Edit Content) as you would any other page in MOSS.
3. Save from the Page menu.
4. Check In to Share Draft
5. Publish when all content changes are complete and approved.

Editing the title
1. Navigate to the Pages folder in the Manage Content and Structure view.
2. Select Edit Page Settings
3. Change the Title as appropriate.
**EDIT THE CONFIRMATION PAGE TEXT**

1. From the Manage Content Structure view, open the pages folder. Locate the confirmation page and choose Open Link in New Window.

2. From Site Actions, choose Edit Page.

3. Insert the headline, page subhead and the explanation form text or page content (Edit Content) as you would any other page in MOSS.

4. Save from the Page menu.

5. Check In to Share Draft

6. Publish when all content changes are complete and approved.

**MANAGING WEB FORM RESPONSES**

When you want to review the responses collected in the MOSS Web form, simply select the list and view the results.

**Viewing List Results**

1. Navigate to the Web form site from the Manage Content and Structure view.

2. Simply click on the list name (Responses), to display the data.

3. The data will be displayed on the right hand of the screen.
**Editing a record**

1. To edit a record, simply select Edit Properties from the drop-down menu of the record to edit.

2. Make edits and choose Ok to save.

*Tip.* Notice that you can delete a record from this menu as well.

**Add a row or record**

1. Select “New” from the toolbar.

**Filter and functionality**

Each column or field can be sorted and filtered by choosing the drop-down arrow next to the column name.

**Export the data to Excel**

1. Navigate to the Web form site from the Manage Content and Structure view. Choose the drop-down menu next to the list name (Responses) and choose Edit Properties

2. This will open the following options menu.
3. Click on the list name (Responses) in the breadcrumb trail.
4. From the Actions menu, choose Export to Spreadsheet.

5. Choose Save and name the file and location for the data.

**Add Notifications**
If you want to receive an e-mail every time a record is added to the data file, simply follow the steps below.

1. Navigate to same menu as detailed in the above process—export to spreadsheet.
2. From the Actions menu, choose Alert Me.
3. Select the options in the New Alert menu as appropriate.