SharePoint 2010 Contact Forms
Website Contact Forms

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An Introduction to SharePoint web forms at CU Denver

Understand SharePoint web forms

The function of web forms
Forms are used to easily collect data from users on your websites. Users fill out and submit an online form, and the data is collected, stored, and sent to the website owners/editors who requested the information.

Forms can include various types of questions, including multiple choice, checkboxes, radio buttons, and text fields.

The functionality of a web form at CU Denver is straight forward, and works in the way you would expect a web form to function. A user locates a form on a website, completes the form by answering a specific set of questions, and submits the form. After the form is submitted, the user is taken to a confirmation page, which confirms the form has been received, and provides any follow-up information necessary.

After forms are submitted, authenticated users can access all the data collected through form submissions via a SharePoint list.

CU Denver web forms – a customized solution
Forms at CU Denver are a customized solution created by the University Web Services team in ATEL. SharePoint does have a form solution out of box, but it did not fit the needs of our university users and websites.

Creating a traditional web form typically requires deeper technical knowledge and coding tasks. The CU Denver customized solution does not require users to be technically savvy to create a web form. The form solution provides an easy way for users of all knowledge levels to create web forms, customize information collected in the form, and access/export the data submitted.
Appropriate use of web forms
Some examples of forms currently in use include contact forms, registration forms, and feedback forms, to name a few. Forms can, however, be used for a variety of other tasks as well.

University Web Services has several forms in use on its website.

- You got into this class by filling out the training registration form.
- Users submit website ideas and suggestions via the feedback form.
- Users can request new or modified SharePoint functionality via the feature request form.

Using web forms has proved very helpful for our central support team. We have a Service Request page on our site that is actually a list of many different forms our users fill out to request our support services. Check it out for examples of the different uses of web forms for your sites.

Inappropriate use of web forms
It’s imperative that only public data is collected on a SharePoint web form. Just like the content on all of our web pages, content collected from a web form is public data. Do not collect any personal and/or private data using a SharePoint web form.

- Abide by the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule and never collect or publish any patient-related data on any university web form.
- Abide by the Family Educational Rights and Privacy Act (FERPA) and never collect or publish any student record-related data on any university web site.
- Never collect or publish any credit card information on any university web site.

The following are a few examples of an inappropriate use of a SharePoint web form.

- A web form to collect patient medical information
- A web form to collect student achievement information
- A web form to collect faculty/staff review information

If you have a need to collect any data similar to the list above, explore other, internal options.
Form web page
Although it appears to be a page, a web form is technically a SharePoint site that uses a specific template. Each form site has three elements: the form web page, the confirmation page, and a responses list.

**Note:** You cannot add any additional elements/pages/sites to a forms site, nor can you delete any. The form site template is pre-packaged with the form page, confirmation page, and responses list and it cannot be modified. The simplicity of the form site elements is what enables users of all technical knowledge levels to effectively create and manage forms.

The form web page is the actual form – the page that displays the questions you need to ask your users. This page uses a web part to pull in the form questions developed by the website owner/editor via a SharePoint list. You can edit and select the questions you want displayed on the page, and you can also add text and images to the form web page if applicable.

**Note:** The form web page is only used to display the form. You manage all form questions and data received via submissions using the **Responses** List.
Page Location
The web form page is one of two pages in the Pages folder of the form site, and is named form(default). The page name can be edited to better suit your needs.

Here is an example of a form web page currently active:

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Confirmation page
The confirmation page is set up automatically when the web form site is created. Users see the confirmation page after they submit a form. Although there is default text on the confirmation page, website owners/editors can update the text on the confirmation page to fit their needs.

The default confirmation page looks like this:

```
Your submission was received successfully.
```

You can edit the text on the confirmation page.

**Note:** We highly recommend that you update the confirmation page with specifics to reflect your department, contact information, confirmation message, and any follow-up information you want to provide to your form submitters.

Confirmation Page Location
The confirmation page is one of two pages in the Pages folder of the form site, and is named confirmation. The page name and content can be edited to better suit your needs.
Responses list
The Responses list is a standard SharePoint list that collects all the data submitted via the web form. Each time a form is submitted, an individual item (record) is automatically created in the Responses list. Every web form site is set up automatically with a Responses list that you can customize.

Note: The Responses list is essentially a list of all the individual form entries. You manage all form data submitted using this list, not the web form page.
The Responses list with entries looks like this:

<table>
<thead>
<tr>
<th>Release Communications</th>
<th>Last Name</th>
<th>First Name</th>
<th>Company</th>
<th>Business Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tester</td>
<td>Testy</td>
<td>CU Denver</td>
<td>555 555 5555</td>
<td></td>
</tr>
<tr>
<td>Tester 2</td>
<td>Testy</td>
<td>CU Denver</td>
<td>333 333 3333</td>
<td></td>
</tr>
<tr>
<td>Tester 3</td>
<td>Testy</td>
<td>CU Denver</td>
<td>222 222 2222</td>
<td></td>
</tr>
</tbody>
</table>

Responses List Location
The Responses list is displayed as a table-like icon in the folder of the form site. It is listed below the Pages folder.

Tip: The data in the Responses list can be exported to a spreadsheet for analysis or can be displayed in a list view within SharePoint. See Export Data to Excel in the Access and Manage Data module later in this course for details.
What is a SharePoint List?
SharePoint lists are a key, underlying feature of a SharePoint site. They enable authenticated users with the ability to gather, track, and share information using the web browser. Lists function similarly to databases, in that individual items (or records) are generated, tracked, and fetched based on specific metadata. A list can be thought of as a collection of pieces of information – all of which have the same properties.

For example, you can have a list for faculty members, where each item includes a name, title, and brief description.

Lists are created using columns. You can create a list with as many columns as you need to gather the data you want to collect. There are a variety of column types you can choose from, including text, number, choice, currency, date and time, and yes/no to name a few.

**Tip:** Think of a SharePoint list like a spreadsheet. It allows you to collect data within specific columns just like a spreadsheet. You create and name columns in the list just like you would in Excel. You can also search, sort, and manage the data you collect in columns just like you would in a spreadsheet.

**List Columns**
At CU Denver, a SharePoint list is used to collect and manage form data. Each question you want on your form is a column in the SharePoint list. You define the column type, content, and functionality when you develop your form. If you want to collect name, phone number, and email address, each one is a column. Think of columns in a list like columns in an Excel spreadsheet.

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Developing Your Web Form Website

Prior to developing a web form site, you should develop the content for the web form. Whether you do this on scratch paper at your desk or via some other medium makes no difference. The goal here is to determine the content for the questions, the type of questions, and the order of your questions.

Consider the following when developing your web form content:

- Do I need to collect any patient information covered by the Health Insurance Portability and Accountability Act (HIPAA) Privacy Rule?
- Do I need to collect any student information covered by the Family Educational Rights and Privacy Act (FERPA)?
- Do I need to collect faculty/staff review information?
- Do I need to collect social security numbers?
- Do I need to collect credit card numbers?

If you answered yes to any of the questions above, a SharePoint web form is not the appropriate vehicle in which to collect your information. Sites using SharePoint on the ucdenver.edu domain are public; therefore, we cannot use them as medium to publish or collect private data.

If you answered no to all questions above, a SharePoint web form will likely work for the data you need to collect. Consider the following when developing your web form content:

- What data do I need to collect from my users?
- Do I need to provide multiple choices?
- How can I use drop-down menus, radio buttons, or checkboxes to offer consistent and quick answers?
- Should I include a free-form field enabling users to type in their own content?
- What fields are required?
- In what order should I organize my questions?
Create a web form site
Creating a form site in SharePoint is very similar to creating a standard sub-site. If you already have experience creating sites, this process should be very familiar to you.

Note: You must have a certain level of permission to create a new site. If you need to make a new site, and do not see New Site as an option under Site Actions in the ribbon, contact your Site Owner or the CMS administrator.

To create a new form site:
1. Navigate to the site (or section) under which you would like to add the new form site.

Note: SharePoint adds the new site to the site/section you are in when you complete this task. Make sure you are in the appropriate site/section before you move to the next step.

2. Click Site Actions, and then click New Site
The Create window opens.

3. Click Public Web Forms for your site template (it is likely highlighted by default)

**Notes:** Public Web Forms is the site template used specifically to create a form. This is the CU Denver customized solution.

Depending on your current site template in use, you may see other options here as well. Another template, Public Web Site – with Approval was recently removed from the options as it creates a number of maintenance issues and constraints for users.

4. In the Title field, type a name for your new form site.

**Note:** The title is the site name that will display throughout the pages on your site, including in the navigation.

5. In the URL name field, type a URL name for the site.
Note: The URL name is the text that will appear for that page in the web address. You can make this the same as the site title, or rename it to something that is short and easy to reference.

The URL name should be one word, and should not include spaces or special characters.

6. Click Create
SharePoint creates your new form site, completing the tasks below (to name a few):

- Builds a default (home) page
- Builds navigation
- Sets up permissions
- Establishes a set of standard folders, including the following:
  - Documents: storage for all documents you upload and publish to your site
  - Images: storage for all images you upload and publish to your site
  - Pages: storage for the web form page and confirmation page for your site
  - Responses: list that stores all your form submission data
  - Workflow Tasks: not currently in use

The web form default page for your new site opens. It is blank.

7. Click the Publish tab, and then click Unpublish

Note: SharePoint automatically creates and publishes the web form page of your new form site. Make sure to Unpublish your form immediately after you create it; otherwise, the default form is immediately viewable to the public.

8. On your new site’s web form page, in the Page tab, click Edit Properties

9. Type the name of your form page in the Name field

Tip: The information you type into the Name field is displayed in the URL for your page.

10. Type the title of your form page in the Title field

Tip: The information you type into the Title field is displayed as the title on your published page.

11. Click Save
Note: Your breadcrumbs are not updated until you Check In.

12. In the Page tab, click Check In

Adding description text
Form pages require additional development after they are created. Although the default form content provides a good start, all it includes is basic contact form data: first name, last name, email address, and user comments. A default form web page looks like this:

![Image of a default form web page]

It's likely you'll need to make changes to the default form page to ensure it fits your needs. Developing a form page typically includes the following tasks:

- Adding a title
- Adding description text
Add a title and add description text

Add a Title

To add a title to a form page:

1. Navigate to the web form page
2. In the Page tab, Edit group, click Edit
3. In the BYLINE field, enter the title of your form
4. In the Page tab, Edit group, click Check In to save your changes
5. In the Publish tab, click Publish (if you are ready to publish your web form page)

Add Description Text

It is highly recommended that you add description text on your form to describe its purpose to your users. To add content, you must use the Content Editor Web Part in Zone 1.

To add description text on your form:

1. Navigate to the web form page
2. In the Page tab, Edit group, click Edit
3. In Zone 1, click Add a Web Part
   The Browse tab will open at the top of your window with web part options
4. In Categories, click the Media and Content folder
5. Note
6. You may need to scroll down to find the Media and Content folder.
7. In **Web Parts**, click **Content Editor Web Part**

8. In **About the Web Part**, ensure **Zone 1** is selected after **Add Web Part to**, and then click **Add**

   ![Add Web Part to Zone 1](image)

   The **Content Editor Web Part** is added to **Zone 1** on your web form page

9. In **Zone 1**, **Click here to add new content**, and enter the text you want to appear above the form

   At this point, you have added text to your web form page, but if you **Check In**, you’ll notice that the blue box with the title **CONTENT EDITOR WEB PART** remains on your page.

   To hide the web part title, you must edit the web part:

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1. Hover over the right side of the blue box in the web part, and then click the down arrow.

2. **Tip:** The web part menu is always available via this drop-down menu, but the arrow is hidden. Whenever you want to edit a web part, you must hover over the upper, right side of the web part to make the arrow appear.

3. In the drop-down menu, Click **Edit Web Part**

4. **Note:** The web part properties display in a box at the upper right of your window. You may need to scroll over and up to see the web part properties.
5. Next to Appearance, click the + to open the menu

6. In the Chrome Type category, click None from the drop-down menu, and then click OK
   The blue box with the title CONTENT EDITOR WEB PART is removed from your form page in the published view

7. Note: You will still see the blue box in edit mode

8. In the Page tab, click Check In to save your changes

9. In the Publish tab, click Publish (if you are ready to publish your web form page)
The form web page pulls questions from the Responses List. To develop questions on the form, you need to develop the Responses List. More specifically, you need to develop columns in the Responses list.

Lists in SharePoint function similar to spreadsheets in Excel. When you gather data in an Excel spreadsheet, you use columns. Likewise, when you gather data in a SharePoint form, you use columns.

Developing a form Responses list typically includes the following tasks:

- Customizing questions (columns)
- Organizing questions
Customize form questions

Although the form works great in its default state, it’s likely that you have a specific set of questions you need to ask your users. To customize your questions, you need to update the SharePoint list that the questions are pulling from.

To customize the form questions:

1. Navigate to the web form page
2. In the Page tab, Edit group, click Edit
3. At the top of the form, click Manage Your List’s Views
   The List Settings page opens
4. Locate the Columns section, and determine which columns you can reuse

<table>
<thead>
<tr>
<th>Column (click to edit)</th>
<th>Type</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Last Name Phonetic</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>First Name Phonetic</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Full Name</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email ID</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Company Phonetic</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Business Phone</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td>Single line of text</td>
<td></td>
</tr>
<tr>
<td>Mobile Number</td>
<td>Single line of text</td>
<td></td>
</tr>
</tbody>
</table>

5. **Note:** You must use the Last Name column. SharePoint has built additional functionality into this column (it uses this column as the title for your list items); it will be problematic if you do not use it. If you do not need to gather Last Name in your form, rename it to something that you do need. Keep the type Single Line of Text.

6. In the Columns section, click on the Column you want to reuse
   The Create Column window opens
7. At the bottom of the Columns section, click Create column
   The Create Column window opens

8. In the Name and Type section, type your question in the Column name field, and then
   click the appropriate type for your question

9. In the Additional Column Settings section, complete the following:
   a. Description: optional – does not show up on your form
   b. Require that this column contains information – click your preference
   c. Enforce unique values: click No
   d. Maximum number of characters: default is set to 255 – update if necessary
   e. Default value: click Text
   f. Add to default view: check to display question on the form

10. **Note:** Additional options show up in this section based on the column type selected. For
    example, if the column type is Choice, you also need to enter the available choices, and
    choose how the choices are displayed.

11. Click OK
    The List Settings page opens
    Your new column appears in the Columns section
Organize form questions

By default, the First Name, Last Name, Email, and Comments columns are displayed on the web form page. Any new column created in which the Add to default view is checked also appears on the form.

Columns in the default view appear on the form in the order documented on the List Settings page, Columns section.

To change the display and order of questions:
1. Navigate to the web form page
2. In the Page tab, Edit group, click Edit
3. At the top of the form, click Manage Your List’s Views
   The List Settings page opens
4. In the Views section, click Basic Inquiry Form
   The Edit View window opens
5. In the Columns section, click to check the Display box next to the columns you want to display on your form
6. In the Columns section, click the Position from Left drop-down boxes, and then select the order in which you want individual columns (questions) to appear on your form
7. Either at the bottom or top of the Edit View page, click OK
   The Responses list opens
8. Note

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9. The Responses list is empty because a user has not yet submitted the form.

10. At the top, left of the Responses list, click the title of your form.

![Image]
The web form page opens.

11. Check the form to ensure the questions display correctly.
Edit Web Form Confirmation Page
The confirmation page, the page users see after they submit a form, is set up automatically when the web form site is created. Although there is default text on the confirmation page, website owners/editors can update the text on the page to fit their needs. The default confirmation page looks like this:

Your submission was received successfully.

The confirmation page is a basic web page in SharePoint. You can update the text on the page like you would update any other page in your website.

1. To update the confirmation page:
2. Navigate to the confirmation page
3. In the Page tab, Edit group, click Edit
4. In the Page Headline field, update the title of the page (if desired)
5. In the Page Content zone, update the text to add a personalized message from your school, college, or department
6. Change the page from a 3-column page to a 2-column page
   a. In the Page tab, click the drop down under Page Layout, and then click the UCD Content Page 2 layout image
7. In the Page tab, Edit group, click Check In to create a permanent version of your changes
8. In the Publish tab, click Publish (if you are ready to publish your web form page)
Test Your Form
You are ready to test your form. You have developed your form page, Responses list, and confirmation page. To ensure your form appears and functions as you intend it to, you should test your form by completing and submitting the form.

To test your form:
Navigate to the web form page
1. Verify the title is accurate
2. Ensure the introduction text above the form is correct
3. Ensure the order and content of the questions is accurate
4. Fill out the form, and hit SUBMIT
   The confirmation page appears
5. Ensure the confirmation page text is correct
6. Navigate to the Responses list
7. Click Site Actions, and then click Manage Content and Structure
8. Locate your form site in the site files
9. Hover over the Responses list, click the down arrow at the right, and then click Open Link in New Window

   The Responses list opens
10. Verify a new item appears in the Responses list

SharePoint 2010 Contact Forms
Access and Manage Form Response Data

**Set an alert**
Do you want to receive an email whenever a user submits your form? Because our customized form solution relies on a SharePoint list to gather content, you can set an alert on the list to keep you informed of form activity.

*To set an alert:*

1. Navigate to the Responses list
2. Click Site Actions, and then click Manage Content and Structure
3. Locate your form site in the site files
4. Hover over the Responses list, click the down arrow at the right, and Open Link in New Window
5. The Responses list opens
6. In the List Tools menu, List tab, click List Settings, and then click Alert Me

The Responses – New Alert window opens

7. Set up the alert parameters and then click OK

8. **Tip:** In the Responses – New Alert window, your name/email address is added to Send Alerts To by default. Remove your name/email address if you do not want an alert for the list.
View List Data
All data submitted via form is sent to the Responses list. Each form that is submitted creates a separate item in the list.

To view the list data:
1. Navigate to the your web form
2. Click Site Actions, and then click Manage Content and Structure
3. Locate your form site in the site files
4. Hover over the Responses list, click the down arrow at the right, and then click Open Link in New Window
5. The Responses list opens, which displays one line item for each form submitted

Intro to lists

You may need to edit a list item (form submission) after the user has already submitted the form. Before you learn how to edit a list item, it’s helpful to understand the difference between a content type, and a view, since you’ll run into both when you attempt to edit a list item.

- **Content Type**: a reusable collection of metadata for a specific category of information in SharePoint lists or document libraries. SharePoint comes with out-of-box content types that act as reusable templates so users can collect and manage the same information in specific situations.

  For example, SharePoint has a Contact content type. The Contact content type comes with default columns of metadata that relate to contact information. Columns include Last Name, First Name, Company, Job Title, Email, etc.

- **View**: a feature of a SharePoint list or library that enables you to see only the items that are most important to you or that best fit your purpose.

For example, say a list has 20 columns in it, but you only need to see 10. You can create a view so you only see those 10 columns. All 20 items still exist in the list, but when you turn on your view, you only see 10.

Why do you need to know about Content Types and Views? Our customized solution for web forms at CU Denver uses both. The Responses list for your form is based on the Contact content type, which comes with 17 default columns. The columns that are displayed on the form use a view – the Basic Inquiry View – to display only some of the columns in the Responses list.

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Edit list item

To Edit a List Item

1. Navigate to the Responses list
2. Click Site Actions, and then click Manage Content and Structure
3. Locate your form site in the site files
4. Hover over the Responses list, click the down arrow at the right, and then click Open Link in New Window
5. The Responses list opens in the Browse state
6. In the breadcrumbs, click the drop-down next to Basic Inquiry Form, and then click All contacts

7. **Tip:** You can also locate the All contacts view in the List Tools menu, List tab

8. Initiate Edit mode one of the following two ways:

9. Locate the list item you want to update, and click the Edit icon in the far right column (if applicable)
   OR

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10. Click the Last Name of the item you want to update, and then click Edit Item

11. Complete desired edits, and then click Save

12. **Note:** All columns appear in the Item window, not just the columns you selected to appear on your web form page. Unless you want to collect additional information, you only need to complete the fields that display on your web form page.
Add a List Item
List items are automatically created when a user submits a form. You can, however, also create a list item without filling out and submitting a form. You may need to add a list item without using the form if someone calls you directly and wants to provide you with the information you otherwise gather via the form.

To add a list item:
1. Navigate to the Responses list
2. In the List Tools menu, Items tab, click New Item
   
   The New Item window appears
3. Complete the desired fields, and then click Save
4. Note: All columns appear in the New Item window, not just the columns you selected to appear on your web form page. Unless you want to collect additional information, you only need to complete the fields that display on your web form page.
Sort or Filter List

The data in SharePoint lists can be sorted, which can prove very helpful if you need to locate data specific to one column in your list (or one question on your form).

To sort list data:

1. Navigate to the Responses list

2. Hover over the column name you want to sort, and then click the drop-down arrow at the right

3. Click the drop-down arrow at the right

4. Click the parameters in which you want to sort the data

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Export Data To Excel
The data in SharePoint lists can be exported to an Excel file using Internet Explorer.

Note: To export data to Excel, you must use Internet Explorer.

To export list data to Excel:

1. Navigate to the Responses list
2. In the List Tools menu, click the List tab
3. In the Connect & Export group, click Export to Excel
4. When the File Download window appears, click Open to view the spreadsheet, or Save to save it to a specific location
5. Tip: Data exporting from SharePoint to Excel is more reliable than from Excel to SharePoint. If you need to make updates to your data, do it in SharePoint and then export to Excel instead of Excel to SharePoint.