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Understanding Forms
All View Forms Users

The website allows content contributors to be able to create forms. Forms are hosted within public or private pages within the website. Users are able to fill in a form, or one may be filled in using View Forms. When a user fills in a form, they create a submission. Each form can have any number of submissions associated with it. A form may be submitted by a user more than once. The relationship between a form and a submission is shown in Figure 1.

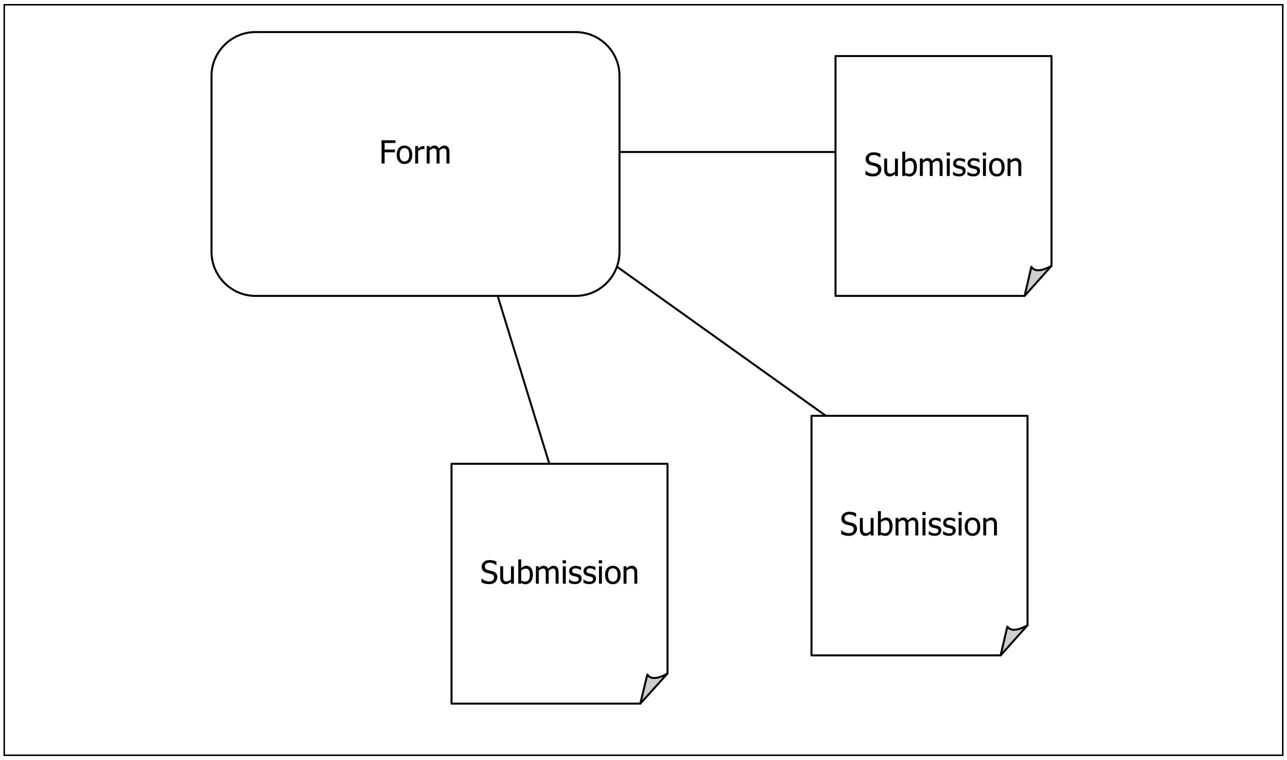

Figure 1 Form Relationships

Form Security:
A form can be filled in by users who are able to view the page which contains the form. Forms are created. Since a form is hosted within the content of a form, forms may be modified by any Content Contributor for the group associated with the page that hosts the form.

NOTE: If a form is associated with a page that is part an Everyone security group, the form can be submitted anonymously.

Creating a Form
All Contributors

Creating forms is a built-in feature of the content editor. This allows anyone who is able to create content to be able to create a form.

The form bar has 2 states – if you are inside or outside of a form. If you are outside of a form, the bar will show the form block. If you are inside of a form, the bar will show each of the form fields that can be inserted.

Creating a form:

- In the content editor, select the place where you would like to insert the form.
- Click “Form”. A dialog box will appear.
- Enter the name of the form. The name can only contain letters and numbers. If the name is different from all existing forms, submissions will appear as a new form in View Forms. If the name has already been used, submissions of the form will be mixed with other forms of the same name.
- Select the user who will receive an e-mail when the form is submitted.
- If this is the first time that a form by this name is being submitted, select “Prepare form for online use” to have the form set up in View Forms.
- Click “OK”.
- A block will be inserted into the content editor indicating “(Place form elements here)”. For most web browsers, this block will be surrounded by a box which shows the extent of the form. The form fields must be inside of the boundaries of the form to able to be part of the form submission.

Figure 2 Insert Form Button

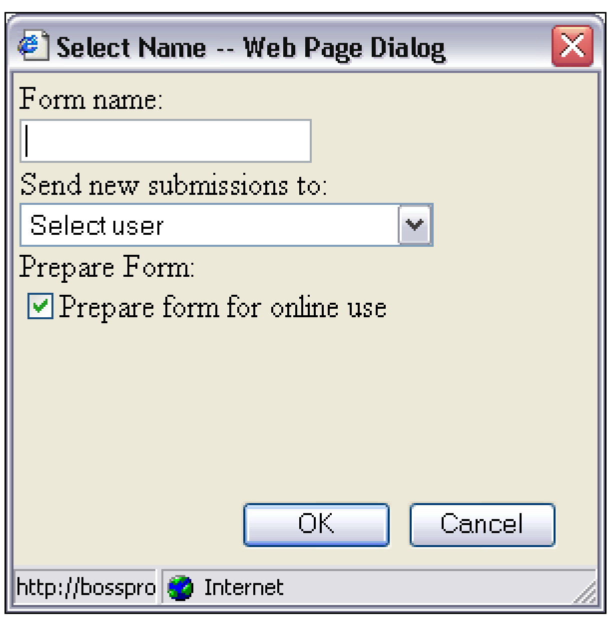

Figure 3 Form Configuration Dialog

Figure 4 Inserted Form Block

Adding Fields to a Form
All Contributors

After a form is created, form fields are added to build the form. Once a form field has been defined, several of its attributes can typically be modified by double clicking on the form field in the content editor or clicking on the form field and then clicking on the form field element in the toolbar.

The following types of form fields are available:

- Text Box
- Text Area
- Check Box
- Radio Button
- Submit Button
- Reset Button
- Label

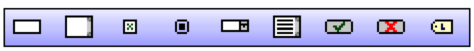

Figure 5 Form Field Toolbar

To insert a field:

- In the content editor, select the place where you would like to insert the field.
- Click on the button of the field that you wish to insert
- For some types of fields, a dialog box will appear and ask for additional parameters. Select the desired options and click “OK” (see below for details of each type). For other types, the fields will be directly inserted into the content editor.

Common attributes:
The following attributes are supported by several of the input fields:

- Field Name:
  - Defines the name of the field.
  - The names of different fields should be different from one another; otherwise only one of the values by that name will be submitted and will represent multiple fields on the form.
  - Radio buttons whose values are mutually exclusive from one another should have the same name, or they will not function properly (selecting one would not unselect the others).
- Required
  - Requires that a field be entered / selected for a form submission to be completed
- Enabled
  - Sets whether a field is able to be entered by the user
  - Typical applications of disabling fields include removing options, such as tickets or special pricing.

Text Box Object
All View Forms Users

A text box is typically used for short textual input. A text box supports validation of the input text.

The following validation types are supported:

- Number (additionally supports limiting entry to whole and / or non-negative numbers)
- Date
- State
- Zip
- Phone number
- E-mail address
- Unspecified (none)

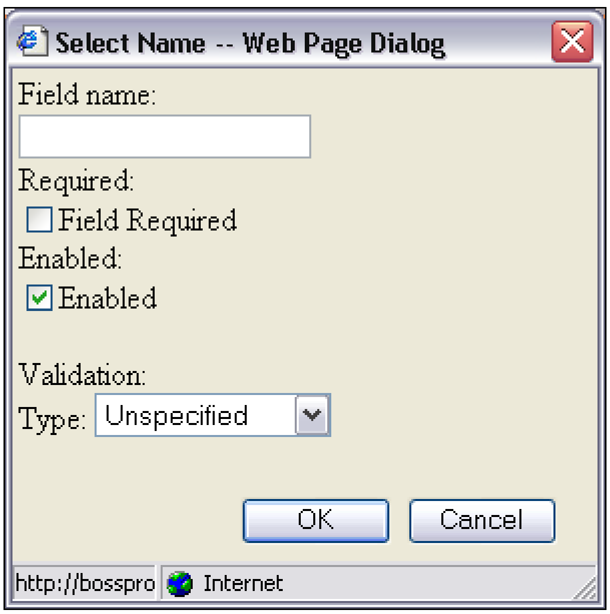

Figure 6 Text Box Validation

Figure 7 Text Box

Text Area Object
All View Forms Users

A text area is used for longer textual input. Text areas are typically used for inputting details or comments.

Figure 8 Text Area Validation

Figure 9 Text Area

Check Box Object
All View Forms Users

A check box is used to indicate a yes / no response.

A check box requires that a value is defined for when that check box is checked.

A check box can be configured to start in either a selected or unselected state.

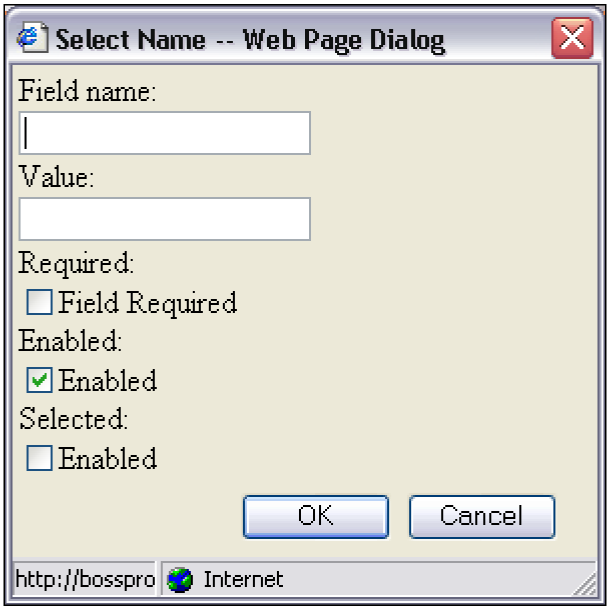

Figure 10 Check Box Validation

Figure 11 Check Box

Radio Button Object
All View Forms Users

A radio button is used to select one response from multiple choices.

A radio button requires that a value is defined for when that radio button is selected. This value should be unique from all other radio buttons with the same name.

A radio button can be configured to start in either a selected or unselected state. If a radio button is set to be selected, it will automatically unselect all other radio buttons with the same name.

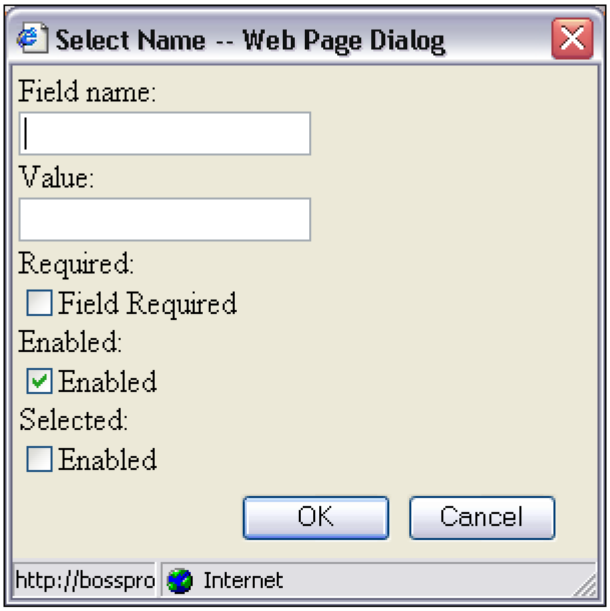

Figure 12 Radio Button Configuration

Figure 13 Radio Button

Combo Box Object
All View Forms Users

A combo box is used to select one response from multiple choices.

A combo box is similar to a set of radio buttons since with both the user selects one option out of many. The combo box allows several choices to be present while taking up only a small area of the screen.

The combo box can be configured to have any number of options.

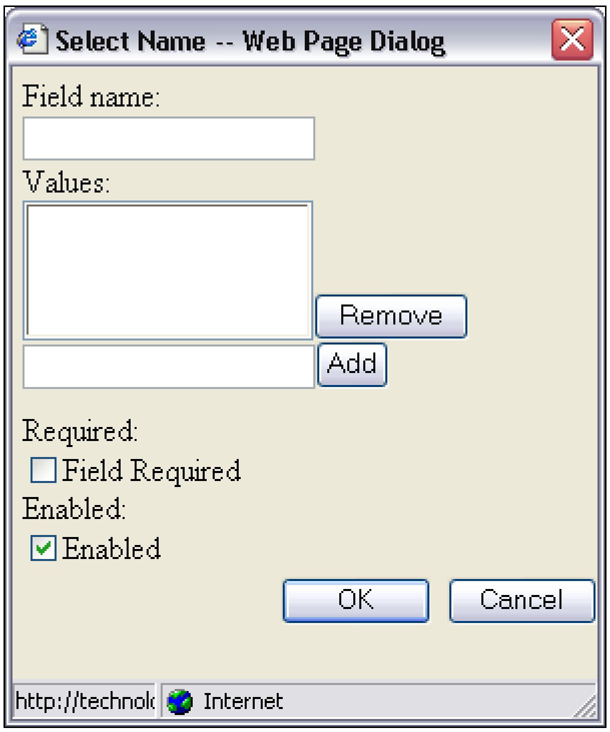

Figure 14 Combo Box Configuration

Figure 15 Combo Box

List Box Object
All View Forms Users

A list box is used to select one or more response from multiple choices.

A list box is similar to a set of check boxes since with both the user can select one or more options out of many. The list box allows several choices to be present while taking up only a small area of the screen.

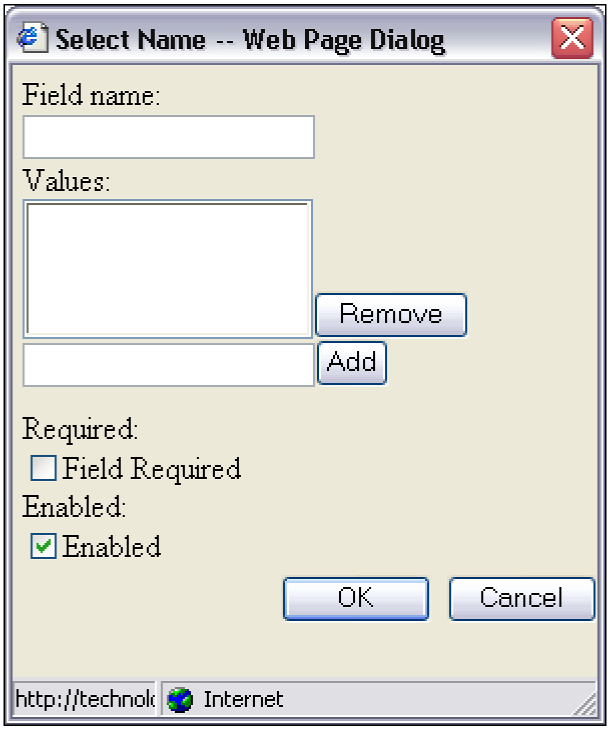

Figure 16 List Box Configuration

Figure 17 List Box

Label Object
All View Forms Users

A label is used to define text in a form as a description for another form field. The label improves the accessibility of a form. Additionally, in several browsers, clicking on a label will select the field that the label is associated with. Text must be selected first for a label to be defined.

When a label is inserted, a field name must be selected to associate it to the label. Additionally, once inserted, a label can be removed through this dialog by clicking “Remove”.

Once a label has been inserted, in several browsers the presence of a label is indicated by the label’s text being underlined with dots.

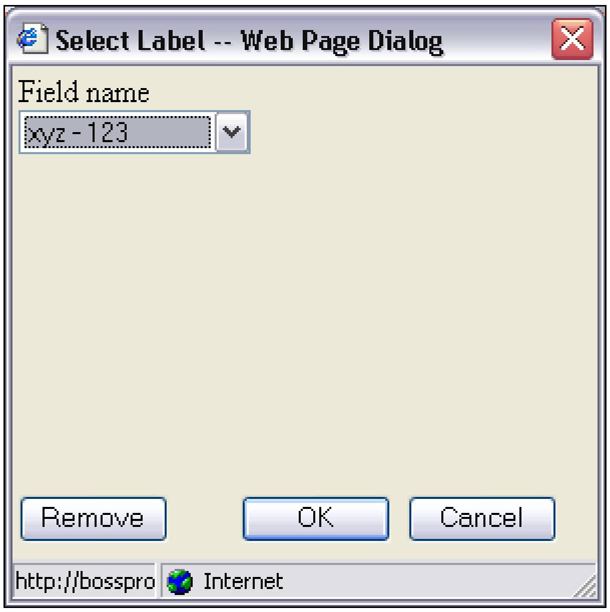

Figure 18 Insert Label Dialog

Figure 19 Label

Using View Forms
All View Forms Users

View Forms is an application that displays form submissions on the website that you are authorized to manage. Within View Forms, you can define a form to do things like represent an event, and track payment information.

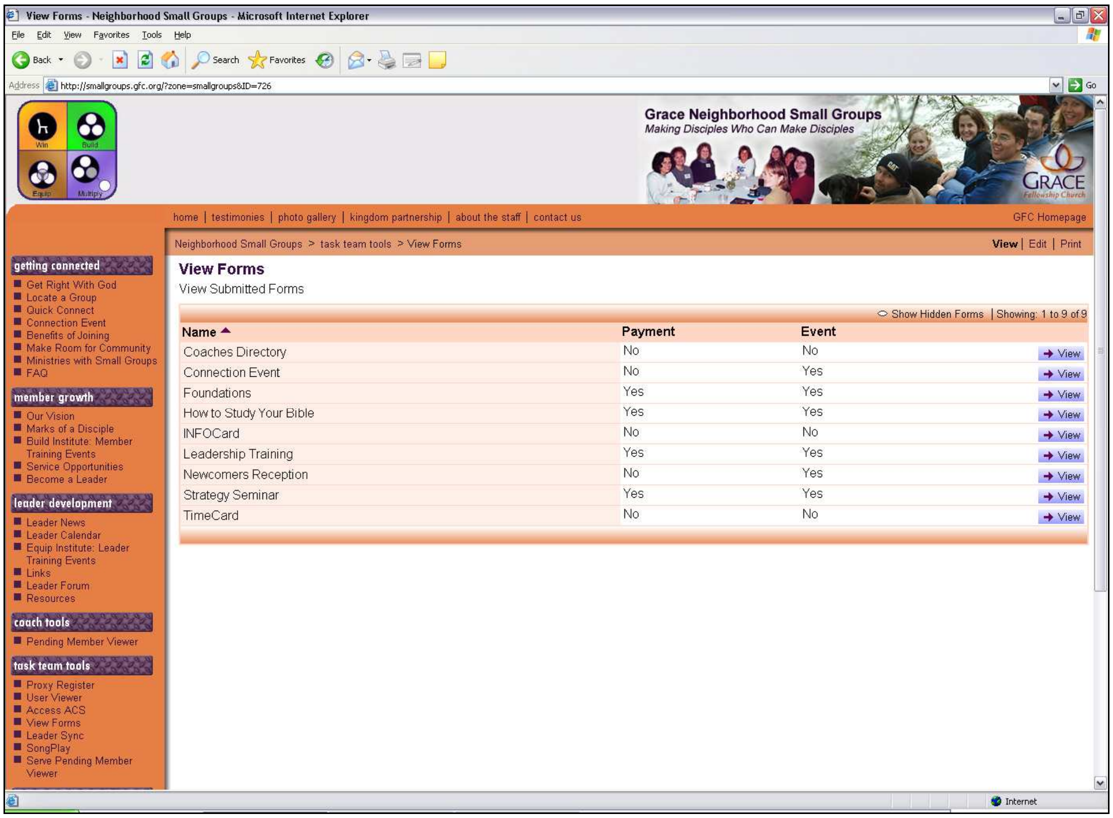

Figure 20 View Forms Main Window

To view details of a particular form

- Click on the name of the desired form
  -or-
- Click on "View" for a particular form
  -or-
- Double click on a form row

Payment and Event options are shown to the right of the form name.

A form can be managed by someone who has contributor or moderator rights for a group.

Viewing Form Submissions
All View Forms Users

After you select a form, you will see a window that contains the submissions of a form, as well as the details about a particular form.

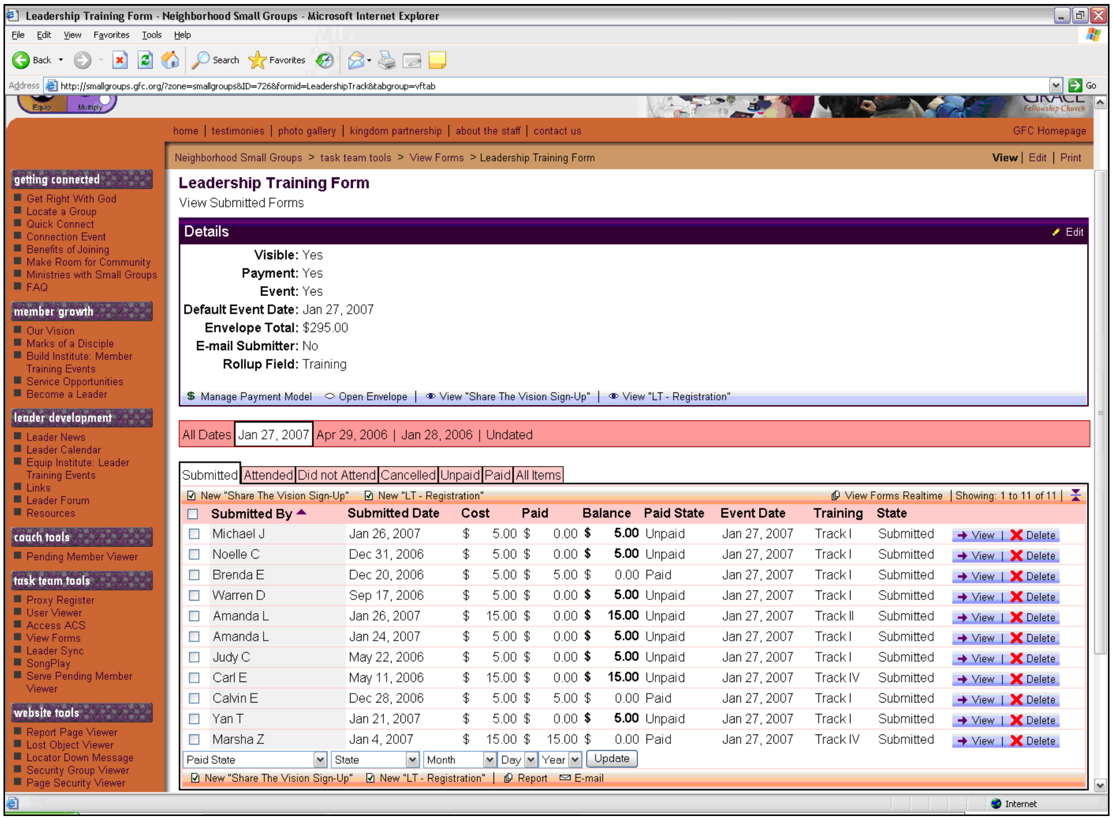

Figure 21 View Forms Form View

A form has the following properties (Details):

- Visible (whether or not a form shows up by default in the main View Forms window)
- Payment (if payment is tracked for this form)
- Event (if the form represents an event)
- Default Event Date (events only) (when a new form is submitted, the event date the new form will be associated with)
- Envelope Total (payment only) (during registration, how much money was collected)
- E-mail Submitter (whether to e-mail the submitter of a form when the form is submitted)
- Rollup Field (defines a field in the form which can be used to differentiate submissions)

To view the page that submits this form

- Click “View (form name) Form” (if there are multiple pages that submit this form, each one is listed)

The form submissions can be filtered by date the following ways:

- All Dates
- A particular date
- Undated

The form submissions can be filtered by state the following ways:

- Invited (events only)
- Submitted
- Processed (non-events only)
- Cancelled
- All Items
- Attended (events only)
- Did not Attend (events only)
- Unpaid (payment only)
- Paid (payment only)

Managing a Form
All View Forms Users

Updating the details of a form allows a form to be configured to represent things such as an event or payment.

To update the details of a form:

- Click “Edit”
- Update the fields that need to be updated
- Click “Update” to update the form details

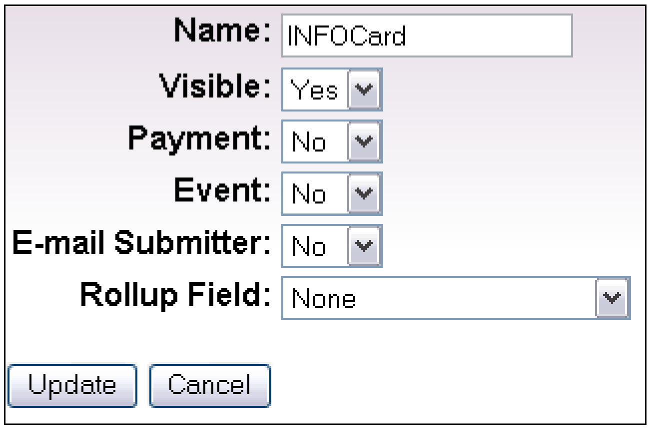

Figure 22 Details

The details of a form are described in Viewing Form Submissions.

The following information about form submissions is displayed from this window:

- Submitted By (which user submitted the form)
- Submitted Date (when the form was submitted)
- Cost (cost for the event)
- Paid (how much user has paid for the event)
- Balance (amount left to pay for the event)
- Paid State (if the user has paid for the event)
- Event Date (date of the event)
- Rollup Field (displays the value of the selected rollup field)
- State (state of the form submission)

To view an individual form submission:

- Click “View”
  -or-
- Double Click the row of the form submission

Figure 23 View Form Submission

To delete an individual form submission:

- Click “Delete”
- Select OK from the confirmation prompt

Figure 24 Delete

To view a user’s profile:

- Click on the user’s name
- If you have access to the User Viewer in the zone where the form submission was made, the user’s profile will be displayed in the User Viewer (if the submission is not for yourself).

To use View Forms Realtime:

- Click “View Forms Realtime”

Figure 25 View Forms Realtime

Creating a New Form Submission
All View Forms Users

To create a new form submission for a user:

- Click on “New Submission” (if there are more than one page to submit the form, there will be a New Submission for each type of form
- Select the user for which the submission is being made. If the person who is represented by the form submission does not have an account, either have a Proxy Register performed for the person, or select “Anonymous” as the user. Proxy Register is the preferred mechanism, as it is more compatible with several reports available within View Forms
- Click on “Create Submission”. This creates a new form submission
- The form will come up for you to fill in
- Fill in the appropriate fields and click “Save Form”

Figure 26 New Submission Button

Figure 27 New Submission User Selector

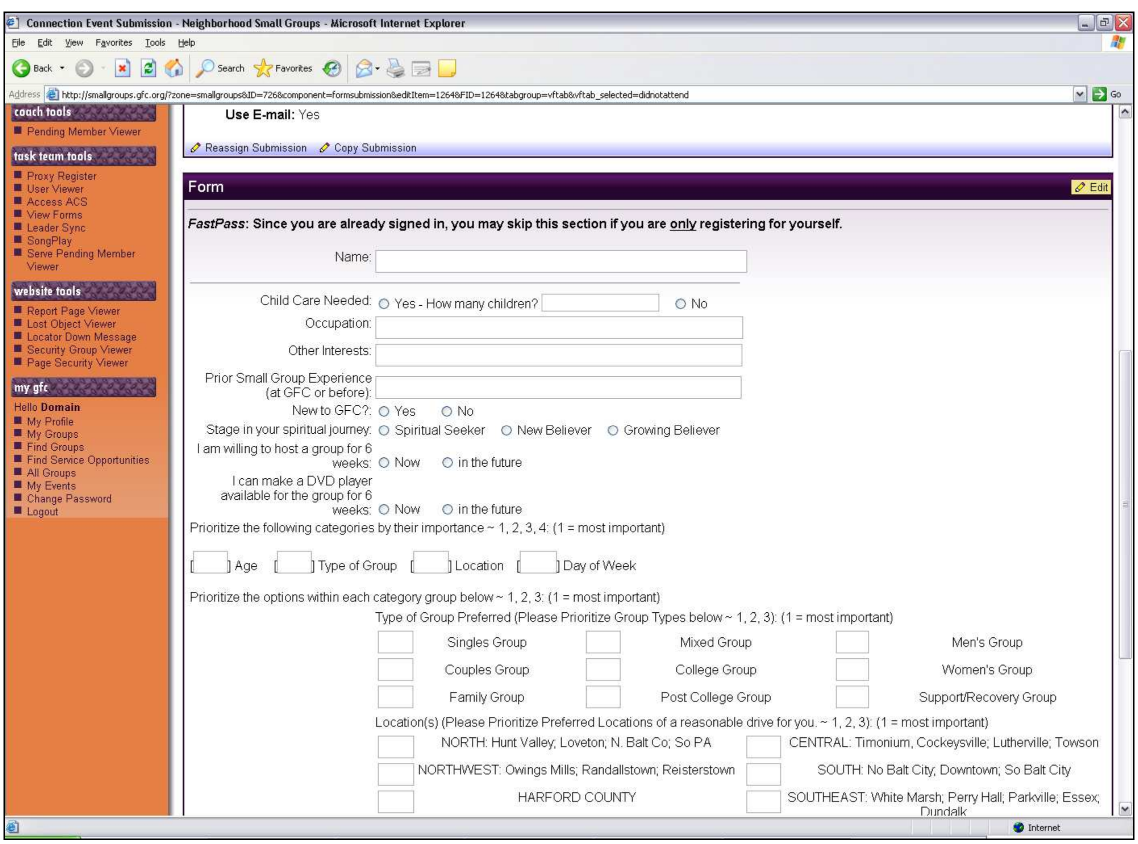

Figure 28 New Form Submission

Performing operations on Multiple Form Submissions
All View Forms Users

From the form page, you can perform actions on several form submissions at once.

The tasks that be performed on multiple forms at once include:

- Update Paid State
- Update State
- Change Date associated with a submission

To update multiple submissions at once:

- Select the checkbox of each submission that you wish to update
- Select the parameters that you wish to update
- Click "Update"

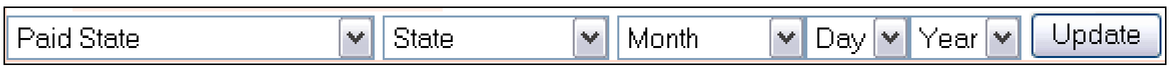

Figure 29 Multiple Submission Bar

To generate a report of multiple form submissions:

- Select the checkbox of each form that you wish to include in the report (for all submissions that are displayed, you do not have to check any form submissions)
- Click "Report"
- Alternatively, the down arrow to the right of report can be clicked on to display the list of reports on the current page. From there, click on the report to be used.

Figure 30 Report

Reports that are available for form submissions include the following (this will vary depending on zone configuration):

- Attendance List
- Barcode Labels
- Export
- Form Data
- Google Map
- Label Printer Labels
- Mailing Labels
- Name Tags
- Payment Report
- Picture Directory
- Roster

To e-mail the people who submitted a particular form:

- Select the checkbox of each user you wish to e-mail (for all users that are currently displayed, you do not have to check any form submissions)

- Click “E-mail”

Figure 31 E-mail Form submitters

Managing the Payment Model of a Form
All View Forms Users

Forms are capable of calculating how much payment is due based on how a form is filled out.

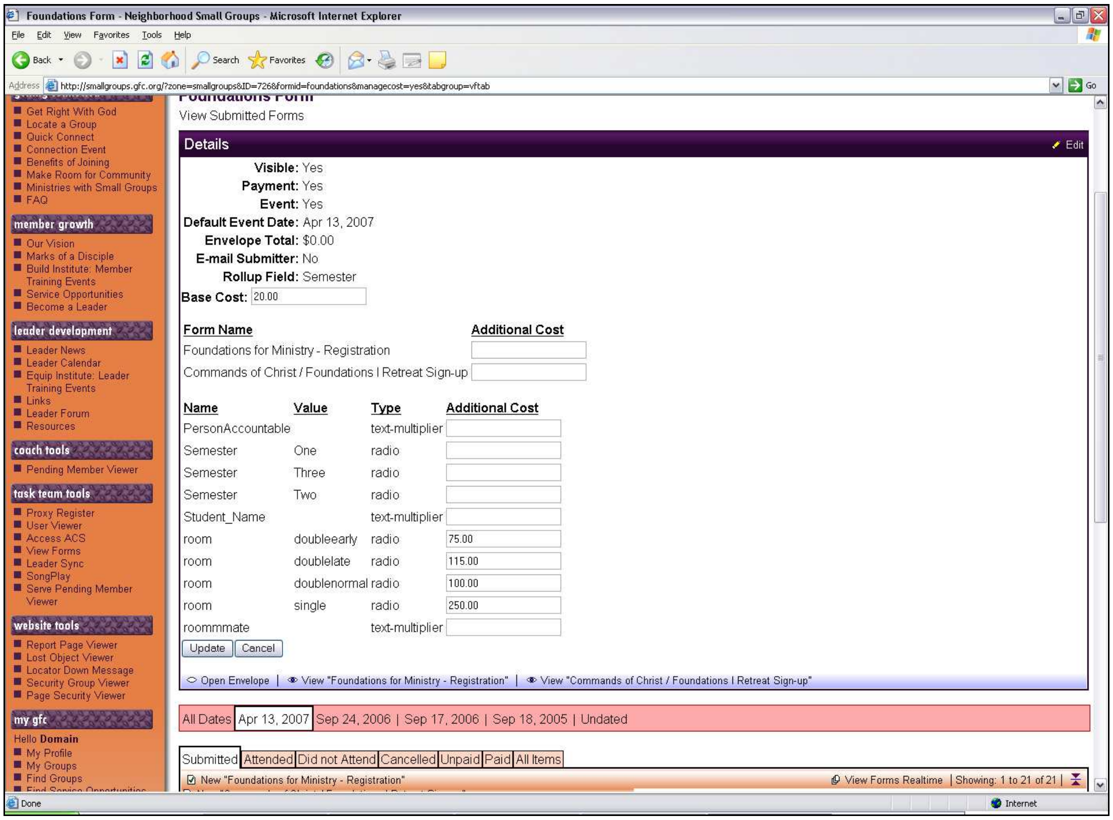

Figure 32 Payment Model

The Base Cost defines a default cost associated with a form.

Which page was used to submit the form can affect the cost. Each form is displayed along with the amount to add.

The individual fields in a form are also capable of altering the cost associated with a submission. Different types of fields can affect the payment in different ways:

Field Type	**Effect**
Text box	Multiply
Radio button	Add
Check box	Add

Managing an Individual Form Submission
All View Forms Users

An individual form submission includes the following information:

- Details of the form submission
- Profile of the user who submitted the form
- The actual form data submitted by the user, shown in the context of the original form

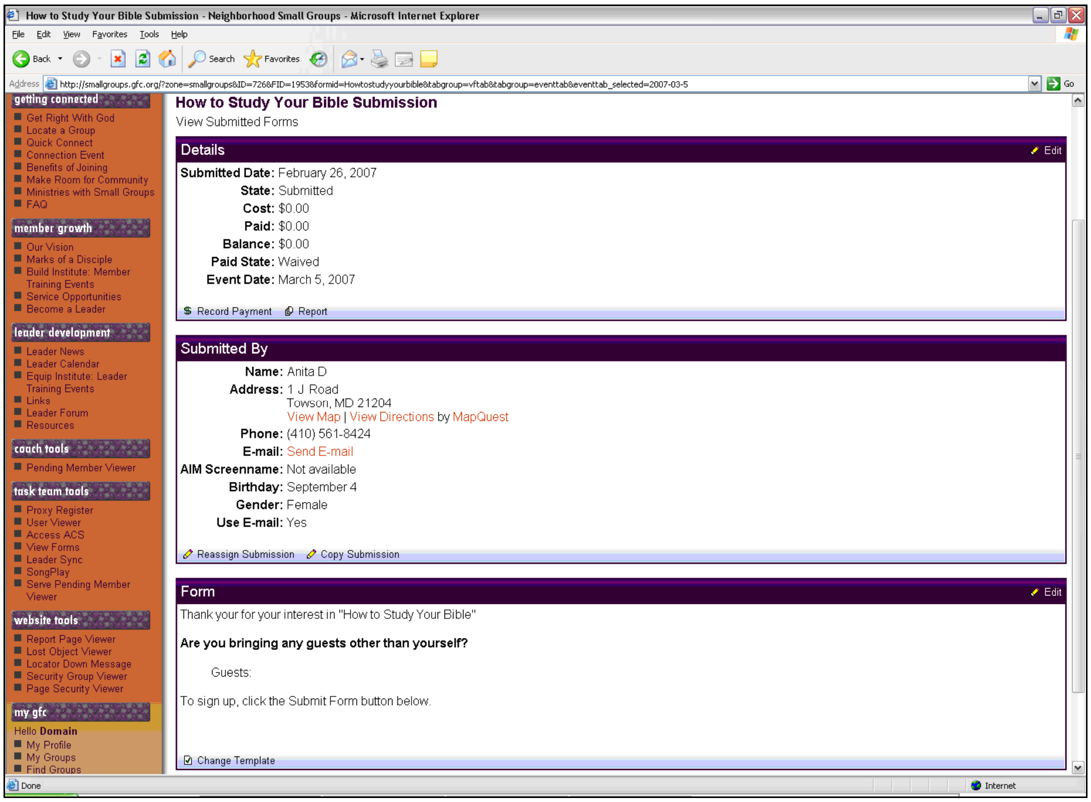

Figure 33 Managing a Form Submission

To record a payment:

- Click “Record Payment”
- Select the Payment Date
- Enter the Payment Amount
- Enter any additional information about the payment (for example, check number) in the Comment field

Figure 34 Record Payment

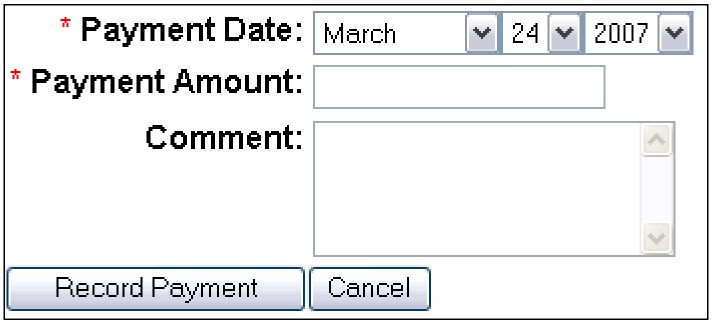

Figure 35 Payment Fields

To generate a report of this form submission:

- Click "Report"

Figure 36 Report

Reports available for an individual form submission include:

- Barcode Labels
- Class List
- Export
- Form Data
- Google Map
- Mailing Labels
- Name Tags
- Payment Report
- Roster

To reassign a form submission to a different person (this is often used when a person submitted a form on behalf of someone else):

- Click "Reassign Submission"
- Select a different person from the list
- Click "Reassign Submission"

Figure 37 Reassign Submission button

Figure 38 Reassign Submission Form

To copy a form submission to a different person (this is often used when a person submitted a single form for him/herself and someone else, such as for a couple or family):

- Click "Copy Submission"
- Select a different person from the list

- Click “Copy Submission”

Figure 39 Copy Submission Button

Figure 40 Copy Submission Window

To change the template of a form submission (this is often used when there are multiple pages that submit to the same form, but have different options or payment schedules):

- Click “Change Template”
- Select a different template from the list
- Click “Change Template”

Figure 41 Change Template Button

Figure 42 Change Template Window

To edit the details of a form submission:

- Click “Edit”
- Update the appropriate fields
- Click “Update”

Figure 43 Edit Form Data

To edit the data entered in a form submission:

- Click “Edit”
- Update fields with appropriate updated data
- Click “Save Form”

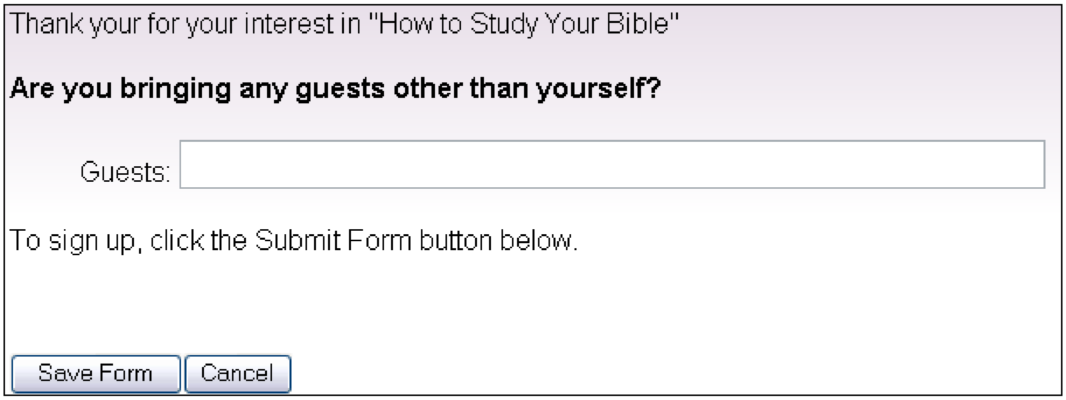

Figure 44 An example form

Viewing Forms for a User

All User Viewer Users

A user's form submissions are displayed in the "Form Submissions" area of their User Viewer profile, shown in Figure 45. The following actions can be performed:

Form Submissions:

Form Name	Submitted Date	State	Cost	Paid	Balance	Paid State	Event Date	Rollup	
Baptism Signup	April 3, 2005	Attended	-	-	-	-	-	-	View | Delete
Foundations	September 8, 2005	Attended	$ 20.00	$ 0.00	$ 20.00	Unpaid	-	One	View | Delete
Strategy Seminar	January 17, 2006	Attended	$ 35.00	$ 0.00	$ 35.00	Paid	-	-	View | Delete
Tracking - Connecting with God's Family	January 23, 2006	Submitted	-	-	-	-	-	-	View | Delete
Coaches Directory	February 23, 2006	Processed	-	-	-	-	-	-	View | Delete
Foundations	August 27, 2006	Submitted	$ 20.00	$ 20.00	$ 0.00	Paid	September 17, 2006	Two	View | Delete
Servant Evangelism Seminar	September 18, 2006	Attended	$ 0.00	$ 0.00	$ 0.00	Waived	September 23, 2006	Large	View | Delete

New Form Submission

Figure 45 User Viewer Form Submissions

View a form submission:
- For the form submission that you would like to view, click "View"
- This will bring up the selected form in View Forms

Delete a form submission:
- For the form submission that you would like to view, click "Delete"
- When prompted if you are sure you want to delete the form submission, click "OK"

Create a new form submission:
- Click on "New Form Submission"
- This will bring up the New Submission form, shown in Figure 46. Select which form you would like to create and click "Submit"
- This will bring up the new form submission in View Forms
- Fill out the form and click "Save Form"

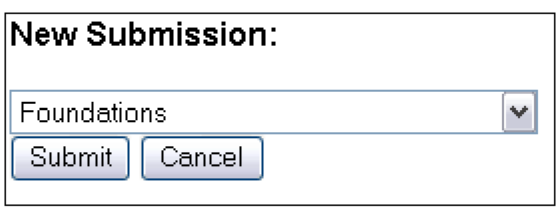

Figure 46 User Viewer New Form Submission

Using View Forms Realtime

Event Staff

View Forms Realtime is used for tasks such as online registration at an event. View Forms Realtime is used with a particular form submission, and can be used to perform the following tasks:

- Changing the state of a form (i.e. from Submitted to Attended)
- Add a person to a group as a member or pending member
- Remove a person from a group
- Promote someone to leader of a group
- Print a label to a Brother or Dymo printer with various options
- Display outstanding payment information
- Record a payment
- Display a picture of the person (if available)

A person can be found by one of the following:

- Searching by their name
- Scanning or entering a preprinted bar code or ticket
- Finding their submission from the last 10 submissions

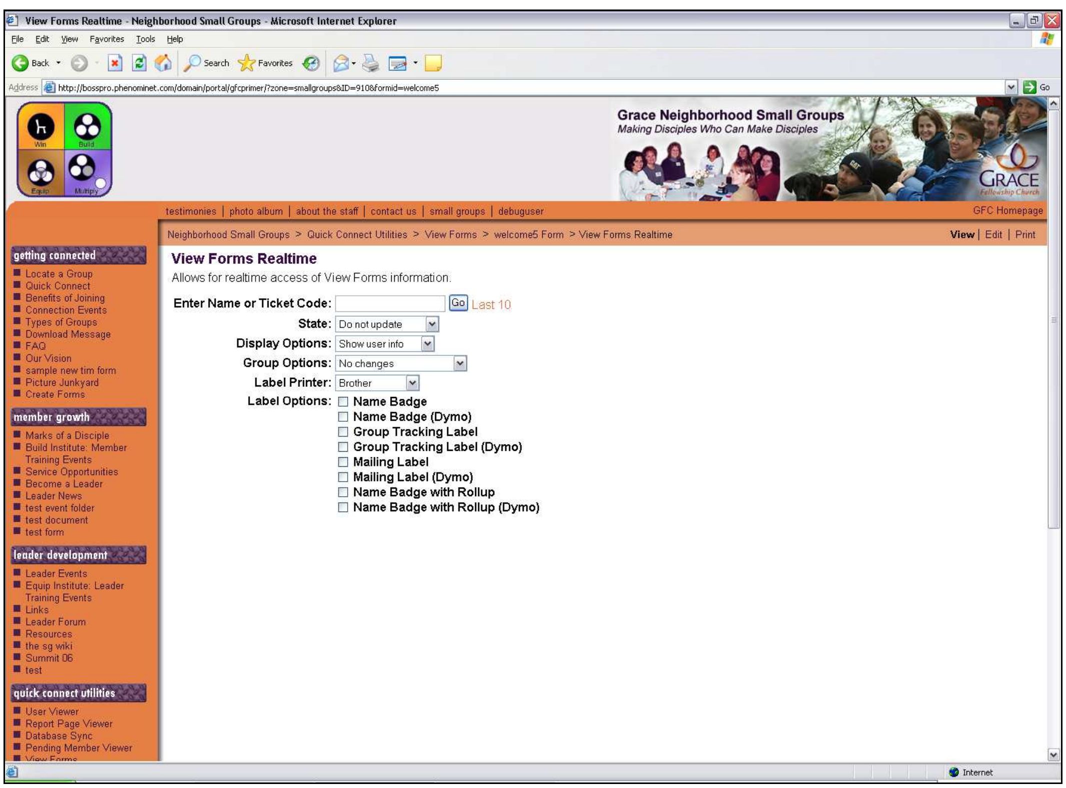

Figure 47 View Forms Realtime

When a search attempt has multiple results, each result appears in a list, displaying the person associated with the form, the form state, and a Go button. Click “Go” to use that form submission.

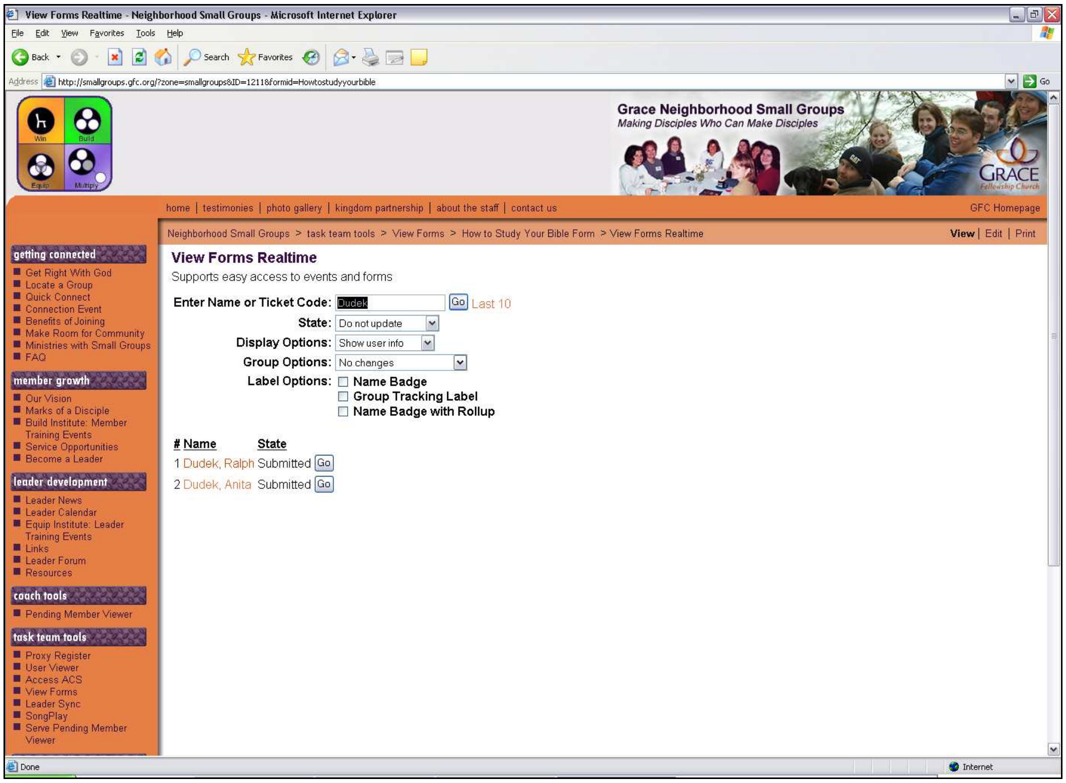

Figure 48 View Forms Realtime Form View

When a single form submission has been selected, information about the form submission is displayed. If additional payment is due, the amount due is displayed.

Figure 49 View Forms Payment Display

To record a payment:

- Select the payment date (the default is the current date)

- Enter the payment amount
- Enter a comment regarding the payment, if appropriate (i.e. “Check #x” or “Cash”)

To waive a payment:

- Click “Waive Payment”

To print a label:

- Click “Print Label”. Normally, if the label options are set up properly, this should be automatic.

Shortcuts:

- Type “last” into the search box and hit enter to get the last 10 results
- When a list of search results is shown, type the number and hit enter to access that submission
- Type “print” into the search box and hit enter to print a label for the current submission

Configuring View Forms Realtime
Event Staff

View Forms Realtime can automate several tasks. These tasks can be configured at the beginning of a registration and will persist as long as you do not leave the View Forms Realtime page.

Updating the state of a form submission:

- Select the condition that causes the submission to be updated. The possible conditions include:
  - Do not update
  - Update if paid
  - Update if now paid
  - Always update
- Select the new state that the submission will have

Setting the display options:

- Select the setting that is most appropriate for your event
  - Show user info (show the person's name and picture, if available)
  - Keep anonymous (do not show the person's name or picture; useful in a public place)

Setting group options:

- Select the setting that is appropriate:
  - No changes
  - Add as pending member
  - Add as member
  - Promote to member
  - Promote to leader
  - Remove from group
- If a group operation is being performed, click "Select Group"
- Select a group in the group selection box
- Click "OK"

Setting label options:

- Select the brand of label printer (currently supported brands: Brother, Dymo)
- Select the type of label to be printed. Supported types include:
  - Name Badge (The person's name)
  - Group Tracking Label (The person's name and a barcode which can be scanned later to add them to a group)
  - Mailing Label (The person's name and address)
  - Name Badge with Rollup (The person's name and the value of the rollup field (such as track designators))

Registration Tips
Event Staff

View Forms Realtime is used most efficiently by first setting up the form to have the desired display, group, and label options, and then searching for a person. The options will stay the same after each successful update.

For registration to work the most smoothly, it is a good idea to have a second computer available with the regular View Forms loaded to handle special cases, such as waivers or problems with the form submission.

For events that are expected to have out of network attendees (especially if attendees are from outside of the region), the registration area should have one person / computer capable of performing a Proxy Register.

For an event with payment, it is suggested to use a setting like “Update if paid”. Setting the State update to “Always update” is a way to force submissions to the desired state if for some reason you need to override what the system is doing. This will cause labels and attendance state to only change after the attendee has paid.

If an attendee is attending, but the payment is in the mail or they are paying later, mark them as attended, but leave payment as “unpaid”. A payment comment of $0 is helpful for recording the reason for not receiving a payment at registration.

Configuring the Active Content Display
Event Staff

The Active Content Displays can be configured to display events, folder items, a photo album, or an external data queue.

Active Content Displays refresh their information after every tenth cycle.

These displays are configured using the Set Instance Parameters dialog, when in Edit mode of the Active Content Display.

Field	**Description**
Marquee Message	Message to display at bottom of Active Content Display
Linked Display (1, 2, 3)	For an external data queue, the queue number where the data is stored, as defined by the External Data Bridge. For a event folder, folder items, or photo album, the page ID of the folder to monitor.
Display Mode (1, 2, 3)	Whether the content element is displayed as rotating **slides** or a **rolling** table
Linked Folder (1, 2, 3)	For a event folder, folder items, or photo album, the page ID of the folder to monitor.
Block (1, 2, 3)	When View Style is a 2 row split view, this field defines whether the content element is displayed in the Primary area (lower section) or Secondary area (upper section)
Show Floorplan	Whether the facility floorplan should be displayed between cycles.
View Style	Whether the main display is made one panel or a 2 row split view

Managing External Data Updates
Event Staff

External Data Queues are automatically updated by the External Data Bridge hourly. These updates can be viewed on the “Manage Display Monitor” page.

A request for an External Data Update can be made. Requests are processed every five minutes.

To Request an External Data Update:

1. Go to the “Manage Display Monitors” page, shown in Figure 50.
2. Click “Request External Data Update” button.

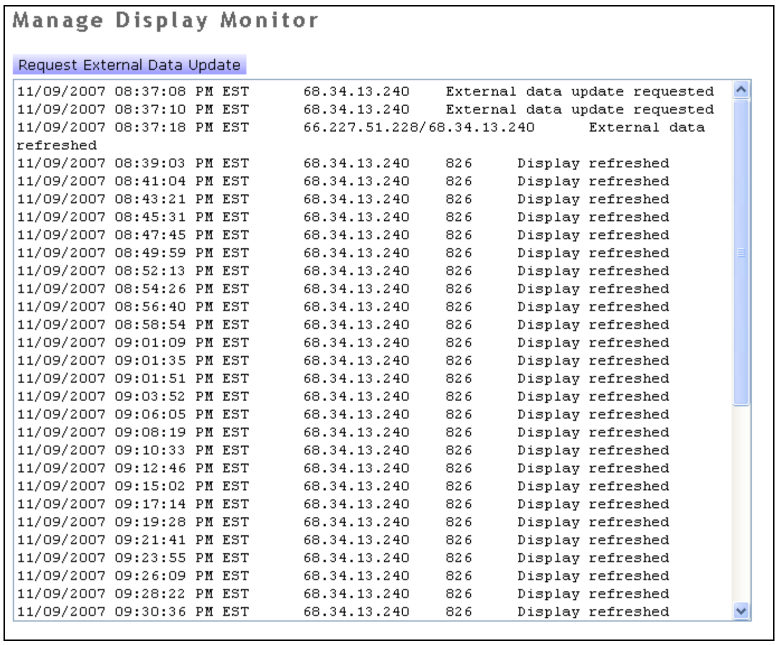

Figure 50 Request External Data Update