cGov eForms

eForms are pages which allow you to create and administer online forms using the cGov CMS. There are many reasons you might need to receive information in a structured way from your website's users e.g. when they are requesting a service, entering a competition or providing feedback to name but a few. Using an online form can help ensure that you capture all the data you require in one go thus making life easier for all concerned.

The basic process for editing existing/setting up new eForm pages is the same as for standard pages, the key differences being an additional information tab, 'Email' and that, rather than adding content and information all at once, we first set up the page then proceed to editing the form. By separating these two stages we can provide a much clearer interface for you to use meaning that although, technologically speaking, eForm pages are more complex than standard pages, they remain easy and straightforward for you to set up.

Adding a new eForm page

- When logged in, navigate to the main section/page where you want your new eForm page to sit – this is referred to as the 'parent' page.
- Scroll to the bottom of the page and click 'New eForm Page'.
- Just like standard pages there are various bits of information eForm pages need…

Details Tab

Title, Description and Body

As per standard pages, these three items are required to help visitors find and understand what this form is for.

Save to Database

This determines how the data people submit is handled. Saving to database means that as well as receiving an email containing each submission, the data is stored on the server and thus you will be able to download all results in one go as a .csv file. Not storing to database will mean that the results are only emailed, not stored on the server. The decision here is really one of security and should be based on what information you are gathering – whilst we do everything we can to make sure the server is secure, nothing is ever 100% so consider what implications there would be if someone got hold of the data.

Allow creator to log in and edit form

Useful for lengthier forms or forms which may require additional information at a later stage. Turning this feature on allows a user to save their progress and, by means of a link automatically emailed to them when they save, log back in and amend/resubmit forms.

Thankyou Message

Allows you to specify a custom short message to be displayed once a user has submitted their form.

Thankyou Page

Lets you pick a page to display when someone has submitted a form, rather than a simple message. For example, if you have several forms all with the same Thankyou Message, setting up a single Thankyou Page means that the same message is given after submitting each form and if that message needs to be altered you can update one page rather than editing lots of individual messages. You can set up a Thankyou Page as you would any other regular page – it's recommended that you select 'No' for show in navigation lists and not to display this on the site map.

Finding this page

Page Name

When you first set up the page you can give it a custom name here. The page name appears in the url as www.charnwood.gov.uk/pages/*pagename*. N.B. Once a page has gone live it is inadvisable to change the page name, instead you can set up aliases as described later in this document.

Navigation Category

Where the page sits on the site. This will be pre-selected based on where you have added your page but you can change its location here should you wish to.

Category (IPSV and LGSL)

Adds further metadata to the page enabling it to be found more easily by the public. You must specify at least one IPSV category.

Show in Navigation Lists

Determines whether the page is shown in the menus on the site.

Show on Site Map

Set this page to be displayed on the homepage 'Council Services' block (Home Page), the footer links block (Other Pages) or both.

Alias

You can give a page multiple aliases in addition to its Page Name e.g. if you need to give an already published page a short url (or if a leaflet's gone out with the wrong url on it!). The alias will appear in the url as www.charnwood.gov.uk/*alias.*

Related Information Tab

The 'other stuff' you might want to add!

Display contact details

Choose whether the relevant council contact details are shown on this page.

Contact information

Automatically picks out the contact information based on the page's location/categories. You can override this by typing the first few letters of the relevant department and selecting them from the list which appears.

Related Documents, Gallery Images and URLs

Allows you to add these supplementary items to the page.

Related Data

Adds the My Charnwood search widget to the page for relevant services e.g. Find My Nearest Library.

Advanced Tab

Resource available from/to

Set the date range that this page is available to the public. You can set either or both of these dates. If a user visits the page outside these dates they will be shown a message to explain the page is not yet/no longer available.

Owner

This is the person who will be responsible for this page. They will receive reminder emails when the page is due for review and will be the point of contact for any queries about the page's content.

Who can view this eForm page?

Allows you to specify that only people belonging to a certain user group can view this form page (user groups are created by your site's super-admin, please contact them for assistance in setting one up).

Redirect to web link

If for some reason you wish to retire/temporarily withdraw the form from public view, rather than deleting the page and causing potential errors for users, you can set a page for people to be redirected to here.

Page review

Determines how often/when the page owner will be notified to review the page.

Automatically publish on date

Allows you to set up pages in advance to be automatically published on a particular date. N.B. the page will be only be published if you have given all the required information when setting it up (i.e. filled in all the mandatory fields in each tab). Also remember that the page will be published with the content 'as is' even if you haven't finished working on it so make sure you're definitely ready before switching this feature on!

Email Tab

Email

The address to which form submissions will be sent. If the form contains a textbox with ID "email" the message will appear to come from that address (field IDs are explained later in this document).

Send a copy to the submitter

If you wish to send a copy of the submission to the person filling in the form, set this option to 'Yes'. This feature requires that the form contains a textbox field with the ID "email" (field IDs are explained later in this document).

Intro to submitter's copy

Allows you to add a brief message which will be displayed at the top of the email sent to the submitter (if you've opted for this).

Email template

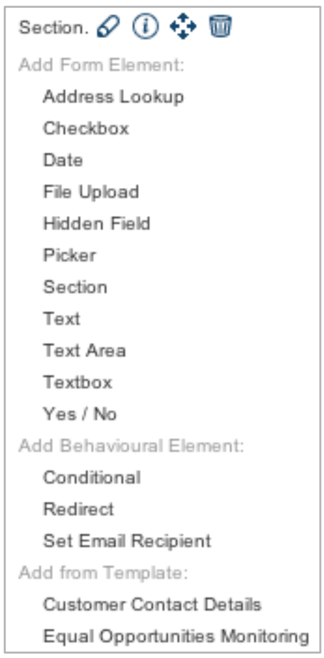
By default, all data submitted by the user will be included in their confirmation email in the same order as it was requested by the form. However, should you only wish to send some of this information or should you wish to format in a different way you can set this up here. This works in a similar way to using mail merge between e.g. MS Word and Excel. You create your custom email template here including the field IDs where you wish the information given by the user to go.

Editing existing eForm pages

- When logged in, navigate to the eForm page you wish to edit, either through the site itself or by going to 'Admin' > 'eForms' and selecting it from the list.
- To edit the page's details and related information click the pencil icon.
- To edit the form itself, click 'Edit this eForm'.
- N.B. Editing an eForm once it has gone live and been used by the public may have an impact on the data collected. Please ask an administrator for advice here.

Setting up your form

Now that you've added your eForm page, you can create the form itself by clicking 'Edit this eForm'.



The eForms Editor menu

Hovering over the top of your form page will display the eForms editor menu. This is a dynamic menu and displays different options depending on what you're hovering over. The general rule is that you first add something by clicking/dragging and dropping, then, if you need to amend/add further details/settings, hover over the item and click the *Pencil*. The other three options at the top of each menu are:

- *Help Text* (the small "i" icon) – click this to add more substantial help text if needed.
- *Move* (the 'crosshair arrows') – click and hold to move the item up or down the form.
- *Delete* (the bin icon) – unsurprisingly, this deletes the item (N.B. deleting fields can have an impact on conditions etc. – please check before deleting!).

As you'll see, the first thing we need to add to a new eForm is a section.

Section

A section is a grouping of form fields to allow data to be sensibly and logically kept together. Click on 'Section' in the editor menu and it will ask for the section title and a brief description if you wish to add one. Once you've added your first section you can click the pencil icon to bring up additional settings e.g. Split sections across pages – if you wish for each section of your form to appear as a separate 'page' you can do so by selecting 'yes' here. This will give each section its own screen and add a 'page x of y' indicator at the bottom of the form to show how far through the form a user is.

Form Elements

Address Lookup (super-admins only) – adds an automatic address lookup option (user enters their postcode and the system will find their address). At present this is only available to super-admins as there is a charge levied by the Post Office for the use of their data in the national lookup service. If you require address lookups please ask your site's super-admin.

Checkbox – add a checkbox field.

Date – add a date picker.

File Upload – allow the person filling in the form to upload a file e.g. a CV.

Hidden Field – add a field which will be added to the internal results email/database to but not displayed to the user.

Picker – add a picker (e.g. dropdown, radio buttons, list or checkboxes).

Text – add text to the form.

Text Area – add an area for the user to input e.g. a paragraph of text (bigger than a textbox).

Textbox – add a single line textbox.

Yes/No – add a question where the answer can only be yes or no.

Behavioural Elements

Conditional – add conditions i.e. display questions based on the answers a user has already given.

Set Email Recipient – for conditional questions, allows a different email recipient to be specified for particular answers e.g. if a user states they have used a council service and is then asked for their feedback using a condition, this feedback can be forwarded to the specific service area by setting them as the email recipient.

Add from Template

Allows you to add predefined 'template' question sets, in the sreenshot above 'Customer Contact Details' and 'Equal Opportunities Monitoring' – these are templates you can create from the eForms admin area for sets of questions used over and over again. See your site's super-admin for advice on creating these.

Element IDs

When you add each item to your form you'll see an ID textbox in the top right hand corner. This is where you give the field its ID, e.g. "email" for the submitter's email (required if you wish them to receive a copy of their submission) or another logical name which sums up what information is being asked for. Giving each field an ID isn't compulsory, the system will generate a random code for each if left blank, but helps keep things logical and is invaluable should you ever wish to look at all the data in a spreadsheet as these will be the column headings!