

Plone Forms

Training Manual

Michelle Loker 9/16/2010

Plone is a web based Content Management System. Plone allows users to easily create, edit, and publish forms to a website. The following will explain how to create, edit, and publish a form using Plone Form Gen.

Contents

What is Plone Form Gen?	1
Authenticated Log In	1
Permissions to Edit/Create forms	1
Plone Navigation	1
What do I need to build the form?	2
Do I have access to add a Plone Form?	2
Steps to Create the Form	4
Beginning steps to creating a form:	4
Creating a Form	4
Form Setup Process	4
Default Form	5
Form Views	6
Editing a Form	6
Editing form fields	6
Deleting form fields	7
Reordering form fields	7
Form Fields	8
Type of Form Fields	8
Adding Form Fields	9
Selection Field	9
String Field	10
Text Field	11
Edit Mailer Adapter	
Determining your privileges for the Mailer Tabs	13
Administrative Privileges	13
Form Creator (w/out administrator role)	15
Other Privileges	15
Edit Thank You Page	
Thank You Tabs	17
Save Data Adapter	

Add Save Data Adapter	
Change an Existing Save Data Adapter	
Save Data Adapter Tabs	
Form Administration	
Option 1 - Publishing a Form	
Option 2 - Giving Permissions to Only Specific or All Logged in Users	
Viewing/Retrieving Saved Data	19

What is Plone Form Gen?

Plone Form Gen is an easy way for users to create forms on a Plone website. Forms can be filled out and submitted via email or saved as a CSV or TSV file that can be accessed when needed.

Authenticated Log In

To create or edit forms you must login to your Plone site by using your UW Oshkosh email login name and password.

To Log In:

1. Select the log in button at the bottom right corner of the page.



- Log in with your UW Oshkosh email login and password. (Do not type @uwosh.edu, just type your user name).
- 3. If you do not see a log in button at the bottom of the page you may also find it at the top of the page.
- If you do not have a log in on your page at all, you can still log in by typing /login at the end the site URL up in the address bar (for example: <u>www.uwosh.edu/training/login</u>).
 Note: Once logged in, you will only see a difference if permissions have been set for you to view, add, and/or edit data. See more information below.

Permissions to Edit/Create forms

Plone Navigation

Once you are logged in, if you have privileges to add a form you will see the tabs and menus. The tabs and menus you see will be based on the permission that have been assigned to you; therefore you may see different tabs and menus than what is provided in the picture below. If you don't see the tabs and menus, try refreshing the browser page. If you still don't see the tabs/menus, contact your site administrator, you may not have sufficient privileges to edit the site.

(Preview of options)



Management Tabs – The tabs located above are used to manage the web content on your site. **Note:** The tabs you see may vary depending on the type of permissions assigned to you.

Contents Tab – This tab will only show when a folder is selected (i.e. the form folder). After you click the contents tab it will show all items within the selected folder. For example if you have your form folder selected, then click the contents tab it will show the form fields within that form folder.

View Tab – This tab will show you a preview of what the form will look like. The view tab can be used to test form submissions.

Edit Tab – *The edit tab must be selected if you want to make changes to the form folder title or properties. Rules Tab* – *A person with administrator role can define actions that would apply to the form folder.*

Sharing Tab – This tab is used to share the form folder with specific users or groups.

Sharing Options:

- Can Add Can add content to the form.
- Can Edit Can make changes to the form.
- Can View Can view the form.
- Can Review Can publish the form.

user/group=	can add	can edit	can view	can review
🔏 Logged-in users				

			actions 🔻 a	dd new 🔻 🛛 state	: private 🔻
Menu	Bar – The	e commands on the menu bar are used to take	e an action on the form.		X checkbox field
					custom script adapter
	• Act	ions — Usad to sut, sonu, ronamo or deleto a fo	rm folder or field		Z date/time field
	• ALL	ions – Osed to cut, copy, rename or delete d jo	initi joluer or jielu.		1.0 decimal number field
	 Add 	d new – Used to add form fields to the form.			fieldset folder
		(Preview of form fields avai	ilahle on the add new menu)	image
		(Freview of John Jields avai	hable on the dad new menu		ab label field
	• Sta	te – The state of the form determines who will	he able to view the form		ines field
	• Jiu		be uble to view the joint.		multi-select field
	\succ	Private – Only those who have been given spe	ecific permissions to add, edi	t, view, review	page
		or have administrative role will be able to tak	re action on the form		** password field
					ab rich label field
	\succ	Published – Anyone coming to the site will be	able to view the form.		richtext field
					save data adapter
Wha	t do Li	need to build the form?			tities selection field
vv 11a	t uo I I	iccu to build the form.			text field
Do I ł	have a	ccess to add a Plone Form?			🕤 thanks page
			c		1 whole number field
2.	Check i	f you have a form folder option (Do not select the Form (below). ***Note*** For each form	this option yet Continue w	vith <u>Steps to</u>	add new ▼ Collection E event
	foldor			•	🗋 file
	ioiuer.				folder
3.	lf you c	lo not see a form folder option you will need t	o add this to the site by follo	wing the steps	form folder
	below:	(Note: To do so you must have administrativ	ve privileges)		image
	a.	Select Site Setup at the bottom right side	Site Setup		large folder
		of the page.	Configuration area for Plone and add-on Produ	ucts.	news item
	b.	Select Add –on Products.	Plone Configuration		📄 page
	с.	Click the check box in front of	😫 Add-on Products	🖃 Mail	restrictions
		PloneFormGen (versions may very).	🗟 Calendar	A Maintenance	
	d.	Click Install.	Collection	🥖 Markup	
	e.	Go back to the home page of the site.			

- f. Navigate to the area of the site you would like to add the form folder to.
- g. Select the Add New menu.

- h. Check to see if you have a form folder option (if not log out and log back in, then check again for the form folder option in the Add New menu).
- i. Continue with the steps below.

Steps to Create the Form

The steps below can be used to help with the form setup.

Beginning steps to creating a form:

- 1. Analyze what type of information you want to collect.
- 2. Determine what type of fields will help collect the information needed (see the list of form fields starting on page 7).
- 3. Lay out the form with the fields.
- 4. Determine who will be able to view/submit the form (All Users or Logged in Users).
- 5. Determine how you would like to receive the data (email and/or comma delimited format).
- 6. Set up the form (directions below).
- 7. Test form submissions.

Creating a Form

Form Setup Process

A form folder must be added before a form can be populated with form fields. The form folder will be the container for all form fields.

- 1. Select the Add New menu.
- 2. Select form folder (Note: If you are creating multiple forms you will need to add a form folder for each form).
- 3. Title The title for the form is required. The title will show in the URL and it is searchable.
- Description Type a short description of the form, this is recommended because it may help users find your form more easily (The form description is optional and searchable).
- 5. Submit Button Label The submit label is the default label a user filling out the form will click when they are done with the form. The default title for the button is "submit", but this can be changed by simply typing the desired text in the submit button label box.
- Reset button If checked, this will add a reset button to the form.
 When clicked by the user it will set the form back to the original state.
- 7. Adapter Action (Mailer) If checked, this will email the form submission(s) to the person who creates the form. This can be changed by the form creator or by someone who has an administrator role.
 Note: It's recommended to edit the mailer adapter so it will show exactly who is receiving the form submission. To edit the mailer adapter see directions below under Edit Mailer Adapter).
- 8. Thanks Page This is what the user will see after they have submitted the form.
- 9. Force SSL connection This is for a secure connection (forms being used on campus should not need this). This would be used with sensitive data such as social security or credit card numbers, etc.
- 10. Form Prologue This can be used to give an introduction to the form. The text in this area can be formatted with the editor toolbar, located above the text area.

		1,0,000	Column .	C Parton	neurs.										
D	efau		Cate	poriza	tion	Date		Own	ershi	p	Set	tings		Overn	des
itle -															
Tra	inir	na I	Rea	ies	t Eo	rm									
		.a													
)escr	riptic	m													
- anor	1 100	nmary	ofthe		114										
.om	oute	Tra	ning P	reque	rst .										-
															1
		11000													-
ubm	IT BL	itton	Label		_										
subm	н														
	how	Ret	et But	ton											
leset	But	ton I	abel												
Rese	t														
ction	h Ad	apter	100	11				-							
chaote	10.10	the for	orm fok	ter, cr	the figure	there.	there a	return	0. #05 to th	is fo	ma	tel mar	torm.	he act	ise.
oes.															
₩ M	aile	ř.													
hank															
ick a v	contr	sined.	Dage M												
valat				ON WIR	BC 1 1 1 2 1 10 1 10 1		18 19 13 0	COURSE STOCK	thui for	111.12	ubmi	 01 r 	1000	0.00	
		dd on	e.) Cho	ou we	one til a	imply	display	v the	ful for	rm a Neisi	ubmi vatu	L ()1 F	1008	919	
CN	one	dd on	e.) Cho	ose n	one tu a	imply	display	y the	ful fo form 1	neid	vatu	L ()1 F	10/14	are	
	one hank orce	od on You SSL to mai	e.) Cho conn ie the f	ection	n n (http://)	e an S	SL-en	abled	form 1	ion o	vatu vatu	L ()f r	tone tps://	ore n e	ab.
C No C TI D F Deck oceal erver Cope.	one hank orce this t sed v that Prol	dd on You s SSL is mal has t ogue	e) Cho conn le the f on-SSI een co	ection one ni ection orm re L URL nfigur	n ndvect b (http://) ed to ha	o an S In orc	SL-en lier to he HT	abled funct	itul form l form l i versi ion pri irotoc	on o oper ol on	t itsi yatu t itsi y, th	L ()1 / INE. INF ()10 IS FEG (443)	tps://	n) if 5 al vve for vva	ND rd E 1
orm	one hank orce this t set v that Prol	dd on You s SSL s mai has t nas t ogue	e) Cho conn e the f on-SSI een co	ection one ni ection orm re . URL nfigur	n n direct to (http://) ed to he	o an S In ore Indie t	SL-en ler to he HT	abled funct TPS p	full form 1 form 1 l vers lon pri irotoc	ion o oper ol on	r ita- ty, th port	L ()f r HE. HI (HI 18 FPG (443)	tps.//	n if s a we forwa	10 11
C No F Ti Beck ccess erver Cope. orm his to	one hank orce this t sed v that Prol	dd on You SSL o mai has t ogue I be c	e) Cho e the f on-SSI een co	ection one ni ection orm re . URL nfigur	n n (http://) ed to he rve the 1	o an S In orc Indie t	SL-en ler to he HT	abled functi TPS p	ful form 1 form 1 i vers ion pri irotec Form	ion o oper of on	r tak	L ()f r HB. III (HI IB FEG (443)	tone tps.//	n) if 5 a we forwa	
C North C Nort	one hank orce this t sed v that Prol st w	dd on You SSL o mai has t ogue be c	e) Cho e the f on-SSI een co	ection one ni orm re L URL ningur	n n ndkect to (nttp://) ed to ne nve the (o an S In ore Indie 1 form fi	SL-en ler to he HT ettos	abled functi TPS p	itul fo form 1 i vers ion pr irotoc Form	ion o oper ol on wat [f sau y, th port	L ()1 r HL HIT (HI HIT	tone tps.// guirer and 1	nin 1) if 5 a we forwa	
C Norr	one hank orce this t sed s that Prol st w mal	dd on You SSL SSL Saar has t ogue I be o E parag	e) Cho conn le the f on-SSI een co lagtayr maph	ection orm re uRu nfigur	n ndirect to (http://) ed to he nve the l	o an S In ore Indie t	SL-en ler to he HT	abled function Text	ful form 1 form 1 i vers ion pr rotoc	ion o oper ol on	r tak y, th port	L () I I IS. INT () IS IS TOT IS TOT IS IS IS IS IS IS IS IS IS IS IS IS IS	tone tps://	ore () if 5 a we forwa	eb ra e t
Norm Norm Norm Place Pla	one hank orce that set v that Prol st w mal	dd on x You > SSL > SSL > mal ia a r has t ogue 1 be c Paral bli ou	e) Cho conn le the f on-SSI een co liaptays agraph graph	ection orm re . URL nfigur	n ndrect t (http://) ed to he rve the l	o an S In orc Indie t torm fo	SL-en ler to he HT	abled functi TPS p Text	ful form 1 form 1 i vers ion pri rotoc Form	ion o oper ol on wat [r tak y thi port	In the second se	tone tps:// purer and 1	ore () if s a we forwa	
C No C TI Neck ccesil erver orm his to B Norr Ple Trai	one hank orce that that Prol at w mal ase ining	dd on t You e SSI to mai tha a r has t ogue the o parai fill ou parai fill ou	e be for the former of the for	ection one ni ection orm re . URL nfigur ed abo	n edirect ti (nttp://) ed to he rve the i IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	o an S In orc Indie t form fr E	a sud displa SL-en ler to ne HT stas jæ	abled funct TPS p Text	fui form 1 i versi ion pr irotoc Form	initia lieita oper ol on set [valu valu f tak y, th port	er on a rec 443 AL U	tone tps:// purer and 1	ore) if s a we forwa orwa	ito ra e t
C No C No C TI Neck cocesi erver lope orm B Norr Ple Trai	one hank orce this t set v that Prol st w mal ase ining	dd on t You e SSI so mai has t has t ba a r has t parai fill ou g staf	e) Cho conn e the t on-SSi een co ingtheyr agraph t this t (ection one n one n orm re L URL n figur ed abo	n edirect ti (nttp://) ed to he rve the () IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	o an S o an S in orc indie t torm fi terst co	a suo displa SL-en ter to ne HT ents.	abled funct TPS p Text	ful form 1 i vera ion privotaci Form 22 aining	ion o oper ol on wat[valu valu t tak ty, th port	All Control of the second seco	tps.// pures and 1	i) if s a we forwa	10 EI
Norr Ple Trai	one hank orce this 1 sed v that Prol st w mal ase ining Epilo	dd on c You e SSL to mal tia a r has t ogue tia a r has t ogue tia a r has t ogue tia a r has t ogue tia a r ogue tia a r ogue ti	conn e the f on-SSi een co haptays graph t this f	ection own re LURL nfigur ed abo	n devect b (http://) ed to he ive the () i i i i i i i i i i o requi	o an S imply o control of the second term for term for term for term for	a sud display SL-en ter to he HT ents imput	abled funct TPS p Text	ful fo form 1 i vers ion pr irotoc Form	nen o oper olon sat[valu valu t tak ty, th port	ALL OF IT CHE IN	tps.// gurer and 1	n na na wy forwa name	eta eta
C No F TI Fineck cocessi erver fope orm his to Trai Orm his to Corm	one hank orce that set v that Prol st w ase ining Epile at wi	dd on x You a SSL o mai ia a r has t be a parai fill ou y staf ogue ll be a	e) Cho conn ie the f ion-SS een co linguage graph rt this f ()	ection orm re u URL u URL in Tigur in d able	n ndirect b (http://) ed to he ive the i iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	o an S o an S in orc andle ti form fr test co	a sud display SL-en ter to ne HT etts.	abled funct TPS p Text Els:	ful form 1 i version pri irotoc Form	on o oper ol on sat[r sau y alui y, th port MTT o m th	All	tone tps.// pure and 1	n in n a with forwa	13 DI
C No	one hand orce that sed v that Prol at w as e ining Epile at w	dd on x You a SSL a mai a a r has t ogue 8 be c paraj hil ou 1 be c	e) Cho conn e the f ingray graph it this f ingleye	ection ection orm re uRL uRL at abo	n direct t (nttp://) ed to he rive the 1 iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	o an S in orc andle t form fi est co	a sud display SL-en ler to he HT sits. iff mput dis.	abled funct TPS p Text EF	ful form 1 form 1 i vers ion pr irotoc Form 2 alming Form	neis neis oper olon sat[HTTI	AIL	tone tps:// gure and 1	n n n n n n n n n n n n n n n n n n n	
C No Contraction of the contract	one hand orce that sed v that Prol at w ase ining Epile xt w	dd on CYou SSU SSU SSU SSU SSU SSU SSU SS	e) Cho conn e the f on-SSI een co liaplays graph it this 1 graph	ection orm re c URL c URL c URL nfigur id able	n direct b indirect b (http:///) ed to ha we the l i i i i i o require r the for i i i i i i i i i i i i i i i i i i i	o an S in orc andle t form fi E est co	a sud depter SL-en ter to he HT stas ift an put de ter f	abled funct TPS p Text til: Text	ful form 1 form 1 i vers ion pr protoc Form 2 alming Form 2 k	ion o oper ol on wat[r sau y, th port HTTI Q	ALL ALL ALL ALL ALL ALL ALL ALL	tone tps.// pure/ and 1	n n n n n n n n n n n n n n n n n n n n	
F Horek F TI F F Freek cocess erver lope orm his to Ple Trai orm his to B Norr his to his to b Norr his to his to his his to his to his his to his his to his his to his his to his his his to his his his his his his his his his his	one hank orce that set v that Prol st w mal ase st w mal	dd on CYou SSL SSL Smal SSL Smal SSL SSL SSL SSL SSL SSL SSL SS	e) Cho conn le the f on-Si een co lisplays and graph incleys incleys angraph	ection orm re c URL of abo	n ndrect to a indrect to to (nttp://) ed to ha vive the l i i i i i o requir o requir i the fo	o an S In orc andle t form fr E est co	a sud depte SL-en ter to he HT ter to no HT ter to te te te te te te	abled funct TPS p Text EF Text	ful form 1 form 1 i vers lion pri rotoci Form 2 aining 5 Form	neid neid oper olon hat[r tav y, th port	ALL ALL ALL ALL ALL ALL ALL ALL	tone tps:// surer and 1	7) if s a we forwa ology	
C Norr Check Increase	one hand orce this tased of the tased of this tased of tas do tased of tased of tased of tased of tas do tased of tased of	dd on c You e SSL is mal is a r has t ogue if be c if be c	e) Cho conn e the f een co ingrievy graph it this 1 ingleye graph ny que the a	ection one in one in orm re- . URL . URL . I d abo . URL . I d abo . I d abo . I d a I d a I d a I I d abo . I I d a I I I I I I I I I I	n n divect b divect b ed to ha ve the for i i i i i i v the for i	o an S in ore indie t form fi test co rm field	a suc couple SL-en ler to he HT ite mput te.	abled funct TPS p Text EF Text	Form 1 Form 1 Form 1 Form 2 Form 2	neid oper olon aat[aat a ho a ho a ho a ho a ho a ho a ho a ho	r asu y atu y tr port Port HTT Q on p our	ALL ALL ALL ALL ALL ALL ALL ALL ALL ALL	tpa:// pure and 1 echni e co ing	nine nine forwa ology nitci	
C No Contraction of the second	one hank orce that that that that that that will be that that the that will be that the that that	dd on CYou SSU Somal SSU Somal SSU SSU SSU SSU SSU SSU SSU SS	e) Cho conn e the f een co seen co graph t this 1 graph ispleye graph ny que drace a sink you	ection orm re- c URL n figur rd able m 11 born 1 d able m 11 born 1 stion t xor- u very	n n (mtp:/// ed to hr ed to hr we the i E IE T o requir r the fo E IE S requir s requir s requir s requir	o an S in ore indie t form fi test co refing ie lool	a suc couple SL-en ler to he HT stats iff the stats the for k forw	abled funct TPS p Text SIE Text	Form 1 Form 1 Form 1 Form 2 Form 2 Form 2 Form 2 Form 2 Form 2 Form 2 Form 1 Form 1	nat [and] betat] be	r tak y, th port HTTI O HTTI O	ALL ALL ALL ALL ALL ALL ALL ALL ALL ALL	tpaul pure and 1	r) if s.a. we forwa ology erms	
C No Contraction C	one hank orce that that that that that that that tha	dd on CYOU SSL Somai SSL Somai SSL SSL SSL SSL SSL SSL SSL SS	e) Cho comm on-SS een co septeys graph it this 1 isolaye graph ny que sfice a ank yo	ection orm re- c URL, nfigur rd able ed able e	n n n n n n n n n n n n n n	e an S a h orr andie t torm fa est co rm fiel e torn fiel	SL-en SL-en ier to ne HT imput in the for k forw	abled funct funct firest gje ter fra ter fra	Form 1 i versi ion pro- irotoc Form E ining Form E ining inining ini	neid oper olon aat[r tak y, th port HTT Q HTT Q	ALL ALL ALL ALL ALL ALL ALL ALL ALL ALL	tone tips // pure and 1 echni e co	nite a a we forwa ology nitet	
C No C C C No C C C C	one hank orcs that set s that Prol st w mail ase sining Epile st w f mail sue s trair uest sue sue	dd on CYOU SSL Somal SSL Somal SSL SSL SSL SSL SSL SSL SSL SS	s) Choi commission of the second con-SS een co- second of the second graph of this 1 graph my quie graph my quie annk you	ection oren re una come ne come re una come ne come ne	n n n n n n n n n n n n n n n n n n n	o an S o an S in orc inde t torm fi torm fiel est co rm fiel torn fiel	SL-en SL-en ter to the HT state imput da.	abled funct funct firest ger fer fra fer fra	Form 1 Form 1 Form 2 Form 2	neid oper olon aat[HTTI	AL ML ML ML ML ML ML	tone tps:// pure and 1 	ntet	

- 11. Form Epilogue This can be used to display text at the bottom of the form under all of the form fields. The text in this area can be formatted with the editor toolbar, located above the text area.
- 12. There are additional optional property tabs above the form title. The Default Tab should be selected.
- 13. Set additional **optional** properties for the form folder by clicking on the tabs shown below (Categories, Dates, Ownership, Settings, and Overrides).



14. Click Save

Default Form

After adding the form folder, Plone provides a general email fill able form (shown at the left below). This form is useful if you are only looking to receive email address, subject of email, and comments from the user. To change the default form use one of two methods listed below.

Form View Mode

contents view edit rules	sharing
actions ▼ add new ▼ state	e: private 🔻
Changes saved.	
home > training request form	
Training Request Form	1
Your E-Mail Address	
loker@uwosh.edu	
Cubic of	
Subject -	
Comments -	
	A
	-
2 submit	

Form Edit Mode

	field					
Your E-Mail Ad	dress = du		×	1		
Subject = (Requ	ired)		×	Ø	::	
Comments •		A	×	/		
) submit						
form actions+	enabled	delete	edit			
Mailer		×	ļ			
thanks pages	enabled	delete	edit			
None	0					
Thank You	O	×	1			

Form Views

By default, after the form setup is complete the form will be showing in view mode.

There are two different types of form views:

- Edit Mode Edit mode can be used to make changes to the form.
- 1. Click on the wrench icon it o enter edit mode. More specific instructions on editing different parts of the form are located below under the sections: Editing Form Fields, Editing Mailer Adapter and Editing Thanks Page.
 - View Mode View mode shows how the form will look and can be used to test the form submission. If edit mode it currently selected, there are two methods to get back to view mode.

Method 1

1. Click on the view icon \blacksquare to the right of the form title to enter view mode.

Or

Method 2

1. Click on the view tab above the form title to enter view mode.

Editing a Form

The default fields provided: E-mail Address, Subject and Comments can be easily changed, deleted or reordered by using one of two methods:

Editing form fields

Method 1 (Easier Method)

- 1. If you are not in edit mode, select the wrench icon in the right of the form title (shown in the Form View Mode picture on the previous page).
- The form will be in edit mode (shown in the Form Edit Mode picture on the previous page).
 Note: There are three separate parts of a form:
 - 1. **Form Fields** Are shown towards the top of the form in the order they will appear on the form.
 - 2. **Form Actions** There are two different types of form actions available. By default only the mailer adapter is added, unless unchecked in the form set up process. Both form actions can be used simultaneously.
 - Mailer The mailer adapter will email the form submissions to the form creator, site administrator or to other email addresses if specified.
 - Save Data Adapter Will save the form submissions to a CSV or TSV file on the Plone site.

- 3. **Thanks pages** The thanks page will send the form submitter a thank you that verifies the data they have entered. If none is selected for the thanks page, the user will not receive a form submission thank you.
- 3. To edit a form field click the pencil button 🥓 next to the specific form field you would like to edit.
- 4. Make the changes needed to the form field.
- 5. Select Save.

Method 2

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Select the Contents tab.
- 3. Click on the title of the item you would like to edit.
- 4. Click on the edit tab.
- 5. Make the changes needed to the form field.
- 6. Select Save.

Deleting form fields

Method 1 (Easier Method)

- 1. If you are not in edit mode, select the wrench icon 🗹 to the right of the form title.
- 2. Click the delete icon 🔀, next to the form field to be deleted.
- 3. Select Save.

Method 2

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Select the Contents tab.
- 3. To delete an item select the checkbox in front of the item and click the delete button.

Reordering form fields

- 1. If you are not in edit mode, select the wrench icon 🗹 to the right of the form title.
- 2. Click and hold the reorder icon in the row of the item that you would like to reorder, drag and drop (up or down) to the appropriate location.

Method 2

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Select the Contents tab.
- 3. Click and hold the reorder icon in the row of the item that you would like to reorder, drag and drop (up or down) to the appropriate location.

nome Troi	> training request form ining Postuact Form				
IId					
▲ Up	one level				
		select:	all		
	title	size	modified	state	orde
Г	🞯 Mailer	0 kB	Aug 10, 2009 03:52 PM		::
	ab Your E-Mail Address	0 kB	Aug 10, 2009 03:52 PM		а.
	ab Subject	0 kB	Aug 10, 2009 03:52 PM		
	Comments	0 kB	Aug 10, 2009 03:52 PM		::
Г	🛐 Thank You	0 kB	Aug 10, 2009 03:52 PM		::
-	What is your favorite color?	0 kB	Aug 11, 2009 09:58 AM		

Form Fields

Type of Form Fields

Form fields are used to populate the form so data can be collected.

There is a long list of form fields to choose from (the most commonly used form fields are listed with an asterisk).

Note:	Some of these	fields may vary	slightly depe	nding on which	version of Plone yo	u are using.
-------------	---------------	-----------------	---------------	----------------	---------------------	--------------

lcon	Field Name	Field Description
×	Checkbox Field	Allows for a checked or unchecked field option (i.e. Yes, No, True, False).
2	Custom Script Adapter	Allows the administrator to execute custom script (customized programming would be needed).
\sim	Date/Time Field	Allows for date and time dropdown fields.
1.0	Decimal Number Field	Allows for decimal and whole numbers.
	Fieldset Folder	Folder that groups (categorizes) form fields. For example you may have a fieldset folder that groups General Information : Name, Address, Phone, Email, etc.
file 	File Field	Field to browser for a file. The file field allows the user to attach a file.
	Image	An Image that can be added to the form folder.
ab	*Label Field	Label Only (not a field to enter data).
F E	Lines Field	Allows for one line of data (will not allow word wrap).
Ø	Mailer Adapter	If the mailer adapter is applied, form submissions will be emailed to the form creator or other specified email addresses.
	*Multi-selected Field	Allows for Multiple Fields to be selected (using the Ctrl key or with checkboxes).
	Page	Adds a page to the form folder.
**	Password Field	Typing in this field will appear hidden.
<u>@0</u>	Rating-Scale Field	Allows for the same rating scale on multiple questions.
ab	Rich Label Field	Allows formatted or hyperlinked text Label Only (not a field for the user to enter data). This field can be used by the form creator to add text information or instructions regarding

		the form.
Kal	Richtext Field	Allows formatted or hyperlinked text.
.	Save Data Adapter	Allow the creator of the form or administrator to add the capability of saving submitted form data in a comma separated or tab delimited format.
	*Selection Field	Allows for one selection, with a radio button or dropdown menu style.
ab	*String Field	A single text box to enter information such as name, phone, email, etc.
HEF	*Text Field	Text area that can be used to enter multiple lines of data i.e. Comments.
	Thanks Page	Allows the creator of the form or administrator to add a confirmation page for the person submitting the form.
1	Whole Number Filed	A field that only allows integers.
	Restrictions	Allows the creator of the form or administrator to choose what types of content can be added to the form folder.

Adding Form Fields

Now that the purpose of the form and the fields to collect the data have been determined, the form can be built by adding the individual form fields.

- 1. Select the Add New menu.
- 2. There will be a long list of fields to choose from.
- 3. Select the type of form field you want to add.

Selection Field

A selection field is like a multiple choice question. Selection fields should be used when you want to provide options for the user to choose from and you only want to receive one response.

- 1. Select the Add New menu.
- 2. Click on Selection Field.
- 3. Field Label Fill in the field label

ctions 🔻 add new 🔻	
🛛 checkbox field	
🌠 custom script adapter	
✓: date/time field	
1.0 decimal number field	
fieldset folder	
file field	Add Selection Field
🗋 image	
ab label field	Add Selection Field
Ines field	Selection Field (radio buttons or select)
nailer adapter	Default Overrides
multi-select field	Field Label
) page	What is your favorite color?
* password field	What is your lavoine color:
c rating-scale field	Field Help
rich label field	
richtext field	
save data adapter	×
selection field	Required
string field	Default
Itext field	The value the field should contain when the form is first displayed. Note that this may be overridden dynamically.
thanks page	
1 whole number field	Options
estrictions	Use one line per option. Note that this may be overridden dynamically. [Note, you may optionally use a "value label" format.]
	Red Orange
	Yellow
	Blue
	Presentation Widget
	© Flexible (radio for short, select for longer)
	O Selection list
	C. Dedie huttene

save cancel

(required). A selection field label will likely be in the form of a question.

- 4. Field Help Is optional (determine if the user will need direction on what to enter or choose).
- 5. **Required** Check the box if you want to force a response for this field.
- 6. **Default** Type in a default value if you want the field to be populated when the user opens the form.
- 7. **Options** Type in the options that should display for the person submitting the form. Each new option should be on its own line (shown in the Add Selection Field picture).
- 8. Presentation Widget Choose what format you would like your answers to appear for the user:
 - a. Flexible Plone will pick either selection list or radio button depending on how long the list is (If three or fewer option are entered it will format the options with radio buttons, otherwise it will format a list of four or more options as a selection list).
 - b. Selection List Dropdown menu of options.
 - c. Radio Button Button in front of each choice.
- 9. The Overrides Tab at the top of the page is not really used. This would change the normal settings of the form field which would require custom coding.
- 10. Select Save.
- 11. Click the view tab or the form View button 📑 to preview the form or continue using the Add New menu to add additional form fields.

String Field

A string field is used to enter a short amount of text information, such as name, email and phone.

- 1. Select the Add New menu.
- 2. Select Sting Field.
- 3. Field Label Fill in the field label (required).
- 4. **Field Help** Is optional (determine if the user will need direction on what to enter).
- 5. **Required** Check the box if you want to force a response for this field.
- 6. **Hidden** Check if you want the field to be hidden.
- Default Type in a default value if you want the field to be populated when the user opens the form.
- 8. **Max Length** Max length is set to 255 by default. This will usually be sufficient. If not type the max length you prefer.
- Size The size of the text entry box is set to 30 by default.
- Validator A validator can be used to check common form information for the proper formatting. The list at the right shows common form field validators used in Plone.
- 11. Select Save.

Triged Suffig Field Trige entry field Default Overrides Field Label Name Field Help Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Tring entry field
Default • Overrides Field Label • Name Field Help • Required • Hidden Default The value the field should contain when the form is first displayed. Note that this may be averridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Tield Label Name Tield Help Required Hidden Vefault The value the field should contain when the form is first displayed. Note that this may be averridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Name Field Help Field Help Required Hidden Pefault The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Field Help Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be averridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Field Help Required Hidden Hidden Hidden Kerault Ker
Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be exverridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Hidden Vefault The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Default The value the field should contain when the form is first displayed. Note that this may be werridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Required Hidden Default If we value the field should contain when the form is first displayed. Note that this may be averridden dynamically. Max Length The maximum number of characters the user will be able to input. 255
Hidden Default The value the field should contain when the form is first displayed. Note that this may be exerridden dynamically. Max Length The maximum number of characters the user will be able to input. 285
Indeen Default The value the field should contain when the form is first displayed. Note that this may be overridden dynamically. Max Length The maximum number of characters the user will be able to input. 285
Default The value the field should contain when the form is first displayed. Note that this may be overridden dynamically. Wax Length The maximum number of characters the user will be able to input. 255
The value the field should contain when the form is first displayed. Note that this may be overridden dynamically. Nax Length The maximum number of characters the user will be able to input. 255
werridden dynamically. Max Length 'he maximum number of characters the user will be able to input. 255
Max Length The maximum number of characters the user will be able to input. 255
Max Length The maximum number of characters the user will be able to input. 255
Max Length The maximum number of characters the user will be able to input. 255
The maximum number of characters the user will be able to input.
255
Size
ihe size of the text-entry box, in characters.
30
/alidator
lests input against simple string patterns.
None
None
Is an E-Mail Address
Is one or more E-Mail Addresses separated by commas
Contains only printable characters
Is a well-formed URL
Ic e velid LIS phono numbor
la a valid of priorie fluttiper
Is a valid of phone number Is a valid international phone number

After all form fields are added. Continue below to edit the Mailer Adapter, Thanks Page, and to add/edit a Save Data Adapter.

12. Click the view tab or the form View button 📕 to preview the form or continue using the Add New

Edit Mailer Adapter

If the submitted form will be received by email you will need to edit the mailer adapter so the form submissions get emailed to the proper person.

Editing different parts of the mailer adapter can be done with the proper privileges. What you see when you edit the mailer adapter will vary slightly depending on the type of privileges assigned to you. If the mailer adapter is enabled by default it will send an email to the person who creates the form. This can be changed on the default tab if you have the proper permissions.

Note: There is also a way to change where all emails go site wide. This would need to be changed by someone who has administrative privileges. If you enter an email address in the default tab of the mailer

menu to add additional form fields.

Text Field

A text field can be used to enter multiple lines of text, such as comments.

- 1. Select the Add New menu.
- 2. Select text field.
- 3. Field Label Fill in the field label (required).
- 4. Field Help Is optional (determine if the user will need direction on what to enter).
- 5. **Required** Check the box if you want to force a response for this field.
- 6. Hidden Select the hidden box if you would like the form field to be hidden from the regular view.
- 7. **Default** Type in a default value if you want the field to be populated when the user opens the form.
- 8. Rows Type in the number of rows that should show for the field.
- 9. Max Length Type in the max length for the number of characters the user can type. If 0 is typed there will be no character limit.
- 10. Reject Text with Link Check the box if you do not want to allow the user to insert links in the text field.

menu to add additional form fields.

11. Select Save.

Default Overrides Field Label is required, please correct. Field Label is required, please correct. ield Help Required Hidden efault ne text the field should contain when the form is first displayed. Note that this may be verifiden dynamically. ows ix kax Length ne maximum number of characters the user will be able to input. Use 0 for no limit. Required ix					
Field Label = Field Label is required, please correct. Field Label is required, please correct. Field Label is required to the form is first displayed. Note that this may be verided in dynamically. Field Label is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed. Note that this may be verided in dynamically. Field Label Is required to the form is first displayed	N	Default	Overrides		
Pield Label is required, please correct. Pield Label is required, please correct. Pield Label is required Pield Label is required is the second secon	Field Label				
Pequired Period	Field Label is required, ple	ease correct.			
ield Help Required Hidden Hidden Hidden Hidden Kefault Note that bould contain when the form is first displayed. Note that this may be verifiden dynamically. Nows Keta Keta Keta Keta Keta Keta Keta Keta					
ield Help Required Hidden iefault he text the field should contain when the form is first displayed. Note that this may be verridden dynamically. ows kak Length he maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
	field Help				
Required Hidden Hidden Hidden Hidden Kefault Note that bould contain when the form is first displayed. Note that this may be veridden dynamically. Nows Kefault Kength Re maximum number of characters the user will be able to input. Use 0 for no limit. Kefault Text with Links?					
Required Hidden Hidden Hidden Werridden dynamically. wws K K K K K K K K K K K K K K K K K					
Required Hidden Hidden Hidden Hidden Kefault he text the field should contain when the form is first displayed. Note that this may be veridden dynamically. Nows Kefault Kength he maximum number of characters the user will be able to input. Use 0 for no limit. Refeature Text with Links?					
Hidden Hidde	Required				
Hidden efault he test the field should contain when the form is first displayed. Note that this may be verridden dynamically. ows i ax Length he maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
efault he text the field should contain when the form is first displayed. Note that this may be verridden dynamically. ows i lax Length he maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?	Hidden				
werridden dynamically.	Default				
ows i iax Length he maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?	The text the field should contain	n when the form	is first display	ed. Note that this	may be
tows in the maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?	overnidden dynamically.				_
tows b lax Length ne maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
tows 5 lax Length ne maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
iows 5 Tax Length ne maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
tows Tax Length Te maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?					
in a comparison of the second se					
lax Length ne maximum number of characters the user will be able to input. Use 0 for no limit. Reject Text with Links?	Rows				
Remaximum number of characters the user will be able to input. Use 0 for no limit.	Rows				
Reject Text with Links?	Rows 5 Max Length				
Reject Text with Links?	Rows 5 Viax Length The maximum number of charac	sters the user v	vill be able to in	out. Use 0 for no	limit.
reject text with Links?	Rows 5 Max Length The maximum number of charac 0	sters the user v	vill be able to in	out. Use 0 for no	limit.
setul tor stopping spath	Rows 5 Max Length The maximum number of charac 0 Release Text with Linter2	cters the user v	vill be able to in	out. Use 0 for no	limit.
and the exception growth	Rows 5 Max Length The maximum number of charac 0 Reject Text with Links?	cters the user v	vill be able to in	out. Use 0 for no	limit .

12. Click the view tab or the form View button 📕 to preview the form or continue using the Add New

adapter and the form submissions are not going there the email address information may have already been changed for site wide emails which overrides the email address you enter in the mailer adapter.

Determining your privileges for the Mailer Tabs

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- If you are not in edit mode, select the wrench icon
- 3. Select the pencil icon 🧷, to the right of the form actions Mailer.

Administrative Privileges

If you have an administrator role the following tabs will be available:

	Default =	Addressing	Message	Template 🛛	Encryption	Overrides
--	-----------	------------	---------	------------	------------	-----------

- a) Default Tab:
 - a. Title: Used to title the mailer adapter. The default title is Mailer.
 - b. Recipient's full name: Name of the person receiving the form submissions.
 - c. Recipient's email address Email of the person receiving the form submissions.
- b) Addressing Tab:
 - a. Extract Recipient From Leave this as none. If this is changed it will override the recipients email entered in the default tab.
 - b. CC Recipients Email address(s) listed in this area will be carbon copied on the form submission.
 - c. BCC Recipients Email address(s) listed in this area will be blind carbon copied on the form submission.
 - d. Extract Reply-To From Leave as Your E-Mail Address. In the drop down you should see Your E-Mail Address in the box. This will not be your actual email address; it will be the email address of the person submitting the form.
- c) Message Tab
 - a. Subject When the form is submitted, this will be the default value for the email subject if you do not have a subject field for the user to fill out, or if the user does not enter anything in the subject field.
 - b. Extract Subject From The subject field is selected by default. If you want to receive the subject from a different form field select the field from the dropdown list.
 - c. Body (prepended, appended, signature) Text to be added to the body of the form.
 - d. Include All Fields If checked this will show all fields/responses when the form is submitted.
 - e. Show Responses (Note: Include All Fields must be unchecked for this to work).
 Select the form fields that you would like to view with the form submission. These are the fields that will show in the emailed form submission.
 - f. Include Empties Check this to receive headings for the fields that were not answered.
- d) Template Allows for customization of outgoing mail (don't change this).
- e) Encryption-Used to encrypt the message body (not necessary).
- f) Overrides Can be used to add custom coding to change the default form mailer.

form actions •	enabled	delete	edit
Mailer		×	ļ

Page 14

Form Creator (w/out administrator role)

If you are the creator of the form without administrator role, the following tabs will be available:

a) Default Tab:

- a. Title: Used to title the mailer adapter. The default title is Mailer.
- b. Recipient's full name: Name of the person receiving the form submission.
- c. Recipient's email address: Email of the person receiving the form submission.
- b) Addressing Tab:
 - a. CC Recipients Email address(s) listed in this area will be carbon copied on the form submission.
 - b. BCC Recipients Email address(s) listed in this area will be blind carbon copied on the form submission.
- c) Message Tab
 - a. Subject When the form is submitted, this is will be the default value for the email subject if you do not have a subject field for the user to fill out, or if the user does not enter anything in the subject field.
 - b. Body (prepended, appended, signature) Text to be added to the body of the form.
 - c. Include All Fields If checked this will show all fields/responses when the form is submitted.
 - d. Show Responses (Include All Fields above must be unchecked for this to work).
 Select the form fields that you would like to view with the form submission. These are the fields that will show in the emailed form submission.
 - e. Include Empties Check this to receive headings for the fields that were not answered.

Other Privileges

If you have other privileges, such as content editing you will see the following tabs:

Default	Message
D'OTGIGHTE -	mooodgo

- a) Default Tab:
 - a. Title: Used to title the mailer adapter. The default title is Mailer.
- b) Message Tab
 - a. Subject When the form is submitted, this is will be the default value for the email subject if you do not have a subject field for the user to fill out, or if the user does not enter anything in the subject field.
 - b. Body (prepended, appended, signature) Text to be added to the body of the form.
 - c. Include All Fields If checked this will show all fields/responses when the form is submitted.
 - Show Responses (Include All Fields above must be unchecked for this to work).
 Select the form fields that you would like to view with the form submission. These are the fields that will show in the emailed form submission.
 - e. Include Empties Check this to receive headings for the fields that were not answered.

Page 16

Edit Thank You Page

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Click on the wrench icon
- 3. To exclude a Thank You page Select none to choose not to display a Thank You page to the recipient (not recommended).
- 4. To edit the Thank you page Click on the pencil icon 🥓 to the right of the Thank You.
- 5. There will be two tabs available for editing.

Default -	Fields
-----------	--------

Thank You Tabs

Default Tab:

- a) Title Used to title the thank you page. The default title is Thank You.
- b) Description Can be used to add a summary for the thank you page.
- c) Thanks Prologue This can be used to add additional text above the field responses that the user submitted (similar to a header).
- d) Thanks Epilogue This can be used to add additional text below the field responses that the user submitted (similar to a footer).
- e) No Submit Message The message the user will receive when they have not submitted the form successfully.

Save Data Adapter

The save data adapter allows for form submissions to be saved in a comma – separated value or tab-separated value format. The save data adapter is not added automatically with the default email form that is provided. If the save data adapter needs to be added it can only be done by the creator of the form or someone with administrator role.

Add Save Data Adapter

In order to add a save data adapter you must be the form creator or have administrative privileges.

Page

17

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Select the wrench icon
- 3. Click the Add New menu.
- 4. Select Save Data Adapter (**Note:** If the save data adapter does not show in the menu you do not have sufficient privileges to add this to the form).
- 5. Default Tab:
 - a. Title Used to title the Save Data Adapter. It is recommended to name this something easy like Save Data Adapter, so if you need to go back later it can be easily found.



thanks pages	enabled	delete	edit
None	œ		
Thank You	0	×	J

- b. Extra Data Check the box in front of the item if you like to receive any of the selected data showing. This is usually not necessary.
- c. Download Format Choose the type of format to receive the submitted form data:
 - 1.Tab-Separated Values
 - 2.Comma-Separated Values
- d. Include Column Names If checked this will show column headings with the submitted form data.

Save Data Tab:

a. Save Form Input - If there is saved data it will show here.

Overrides Tab:

a. Execution Condition – Additional custom coding can be added here.

Change an Existing Save Data Adapter

- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Click on the wrench icon
- 3. Click on the pencil icon 🥓 to the right of the form actions save data adapter.
- 4. Make the changes you need to the save data adapter tabs below.

Save Data Adapter Tabs

Default	Title, Extra Data, Download format (Tab – Separated Values,
	Comma – Separated Values), Show Column Names.
Saved Data	Will show all of the saved data information. If you delete the
	information from this area it will be gone (be careful not to delete
	this information until you have it saved or no longer need it.)
Overrides	Custom coding.
(Administrative Privileges Needed)	

Form Administration

Before the form is made available for submission, the setup of the form should be complete with the form adapters in place (mailer and/or saved data adapter). The next step is to determine one of two ways to administer the form.

Option 1 - Publishing a Form

Publishing a form will allow all visitors of the site to view/submit the form.



- 1. Make sure that the form folder is selected (if not, click on the title of the form in the navigation).
- 2. Click the State dropdown menu.
- 3. Options:
 - a. Publish Publishes the form directly to the site. Anyone can view the form.

- b. Submit for Publication This is used if there is a workflow set up and it needs to be approved before published.
- c. Advanced Gives the option to publish the whole folder and everything in the folder (i.e. if you had pages in the folder). This option will also let you set a publish and/or expiration date for the form.

Option 2 - Giving Permissions to Only Specific or All Logged in Users

Allow only logged in users to view/submit the form:

- 1. Make sure the form folder is selected.
- 2. Click the sharing tab.
- 3. Click the check box under can view for Logged-in users or type in specific users in the search for

user or group box and assign the view privileges to them individually.

4. If checked, uncheck the inherit permission from higher levels. **This is a very important step**

<u>otherwise you may be giving more permissions than you intended</u>. This means if you have given more privileges to other areas of the site for specific users they would inherit this privilege on the form folder (you may or may not want that).

- 5. Click the Save button.
- 6. <u>Important Note***Do not Publish the form***</u>. If you have published the form select the State dropdown and choose Retract.
- 7. Provide the users with the URL for the form, to do so select the form folder. Copy and paste the URL in the browser address bar and send it to the necessary users. It will prompt them to log in before they can view/submit the form.

Viewing/Retrieving Saved Data

In order to add or retrieve data from the save data adapter you must be the form creator or have administrative privileges.

- 1. Make sure that you have the form folder selected.
- 2. Click the contents tab.
- 3. Click on the Save Data Adapter title.
- 4. Click on the link that says "Click here to get the saved input".
- 5. Choose to either save or open the data.
- 6. You can choose to clear the saved input by selecting the Clear Saved
 Input button. Note: Make sure you have saved the data if you need
 it before selecting the Clear Saved Input button. The clear saved input button will clear <u>ALL</u> of the saved data (be very careful when using this).

Example: Save Data Adapter Excel File



Sharing for "Training Request Form"							
You can control who can view and edit your item using the list below.							
Search for user or g	roup	۹, se	earch				
user/group+	can add	can edit	can view	can review			
A Logged-in users			V				
Inherit permissions from higher levels By default, permissions from the container of this item are inherited. If you disable this, only the explicitly defined sharing permissions will be valid. Ite deversive, the symbol I indicates an inherited value. Similarly, the symbol I indicates a global role, which is managed by the site administrator. Save Cancel I save R 2009 01:27 PM							

				what-excel-2007-classes-would-	what-titan-files-classes-
name	last-name	topic	what-word-2007-classes-would-you-like	you-like	would-you-like
			['Create and Edit a Document',		
			'Formatting Text', 'Tables and Charts',	['Excel Creating Spreadsheet',	
Michelle	Loker	Training Request	'Controlling Page Appearance']	'Excel Tables and Charts']	['Titan Files Introduction']
			['Formatting Text', 'Controlling Page	['Excel Formatting Cells and	['Titan Files Collaboration
Training	Staff	Training Please	Appearance']	Worksheet Structure']	and Sharing']