

Beginning Web Forms

I. Introduction to Forms

A. Paper vs. Digital (Web forms)

Regardless of format, the basic purpose of a form is to capture various types of information from one person that will in turn be sent to another person or organization in a logical, (preferably) easy-to-follow format. The standard paper form has been a fundamental part of office and business life for decades, gathering feedback for restaurants, placing subscriptions for print media, or ordering products from corporations. Clearly, the paper form will continue to have its uses in the foreseeable future.

But in the increasingly complicated world of online communication, business, and information, Web forms are everywhere and can do anything imaginable from ordering a pizza on dominos.com (that will **still** be delivered in less than 30 minutes) to requesting information about an interesting college or university program.

Web forms have succeeded in replacing paper forms (or even phone calls or trips to Domino's) for three reasons:

- **Web forms are fast.** Instead of looking through a catalog and using an order form to buy a new shirt, a person can go online, browse an entire inventory of shirts and buy a new shirt in 30 minutes, fractions of the time it would have taken for the paper order form to be mailed to some obscure city in a far away state.
- **Web forms are easy to use.** (Note: That doesn't not always mean they are easy to create!) Imagine that the hypothetical shirt company from above just received the paper order form from Joe in Tucson. It turns out that Joe has terrible handwriting, and they send him the completely wrong product. Now Joe's angry, sends the shirt back, demands a refund, and vows not to ever order from a catalog again. Web forms obviously don't have this problem, and they allow a user to make corrections to the information they type into the form without going to find the Wite-Out™.
- **Web forms are more cost effective (and environmentally friendly) than paper.** Paper forms cost money to print. Over and over and over. Web forms are free to set up (**not including** any software that is purchase) and can run fine on most organizations' existing Web servers. This is true for UTM – we already have everything needed to start using forms online while cutting down on printing costs.

B. Types of Web Forms.

So as discussed above, Web forms have plenty of benefits over their paper cousins, but getting started with Web forms requires knowledge of more than just basic word processing or desktop publishing (as required for paper forms). There are several types of Web forms with varying uses and degrees of difficulty to create. These types include:

- HTML forms sent to e-mail (covered in this handout)
- PDF forms (covered in this handout)
- HTML forms attached to a database, including Dragon WebSurveys, PHP, ASP, etc. (NOT covered in this handout)

Forms tied to a database are beyond the scope of what most users at UTM need for their Web sites and are also beyond the scope of a single training session or handout and therefore will not be covered here.

II. HTML forms

A. Requirements for HTML forms

In terms of simplicity, HTML forms are the easiest types of forms to create with a little knowledge of a Web editing program. HTML forms can also be written by users with knowledge of the HTML scripting language in a Web editor or with a simple text editor.

For a user with no knowledge of HTML, using a Web editing program such as Adobe Dreamweaver will allow the form creator to build a form through the use of menus which add the form features to a Web page without requiring the user to write any HTML. The downside to this method is the cost of Dreamweaver (the best Web editing software on the market). Less expensive software, including Adobe's (formerly Dreamweaver's) Contribute software does not allow the user to create forms or write HTML and thus is not useful for form creation.

Thus, the minimum requirements for creating HTML forms are **either** a working knowledge of HTML **or** a What-You-See-Is-What-You-Get Web editing software program such as Dreamweaver.

B. Creating an HTML form in Dreamweaver

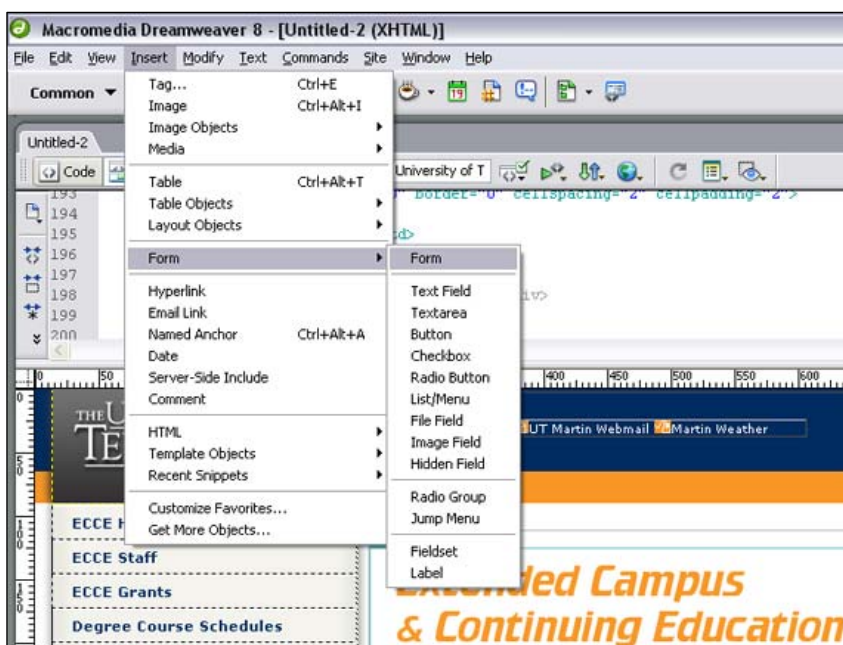
Assuming that a user who knows HTML does not need an explanation of how to write the code for a form, the following section will show how to create an HTML form using only the menus available in Adobe Dreamweaver for users who will only use its Design mode.

Step 1. Create a new document.

Open a new document in Dreamweaver from the File menu or by pressing Ctrl+N.

Step 2. Create a new form.

Click in the body of the Web page at the location where the new form will be inserted. Then create a new form by clicking the Insert menu (at the top of the screen) the Form > Form.

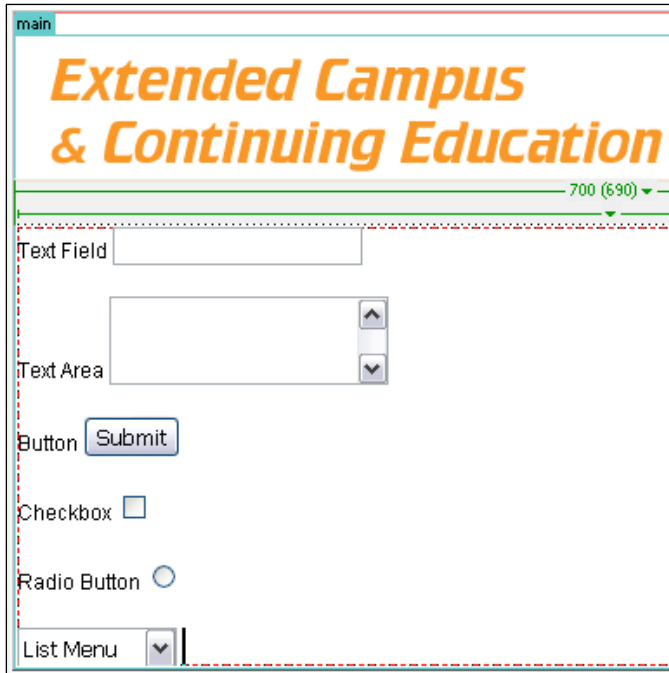


Adding a Form.

Add a form to a Web page from the insert menu in Dreamweaver. This inserts a red rectangle into the body of the document where all of the form's fields must be placed to work properly.

Step 3. Add fields to the form.

After the form “rectangle” is added to the page from the Insert menu, click inside the red rectangle to add the inputs that a user will insert information. To add different inputs, go to the Insert menu and then to Form (see screenshot on Page 2 of this handout). On this menu, all of the different form field options are available to be added to the form. Click the type of field you want to add it to the page. If a box pops up asking you for a label, just click “Ok” with the default buttons checked on the pop. The most common form inputs are the text field, text area, button, checkbox, radio button, and list/menu.



Different form fields on a Web page

The **text field** is used for one line response such as Name or E-mail.

The **text area** is useful for longer, multi-line responses such as a paragraph for users' comments about a service.

Buttons are used to submit or reset the form.

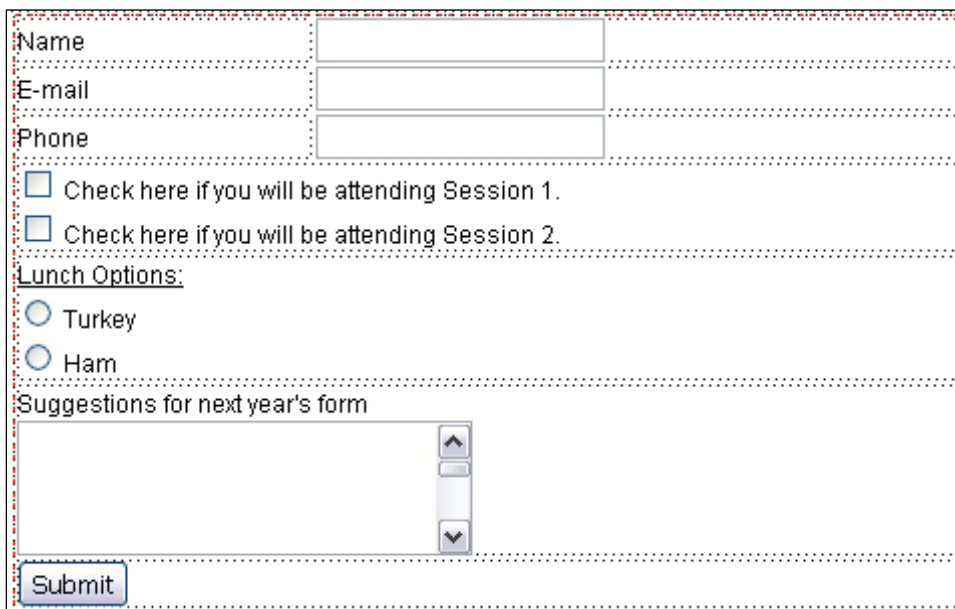
A **checkbox** is used when a user is allowed to check one or more options from a list (i.e., if they are selecting which sessions to attend from a list of five sessions on different days).

A **radio button** is normally used with a group of other radio buttons when a user must choose only one option from the list (i.e., if they can only attend one of five sessions that occur simultaneously).

Finally, a **list or menu** is used when the user must choose a response from a defined list of options. Menus allow for one choice; lists allow for multiple choices.

Step 4. Name the fields.

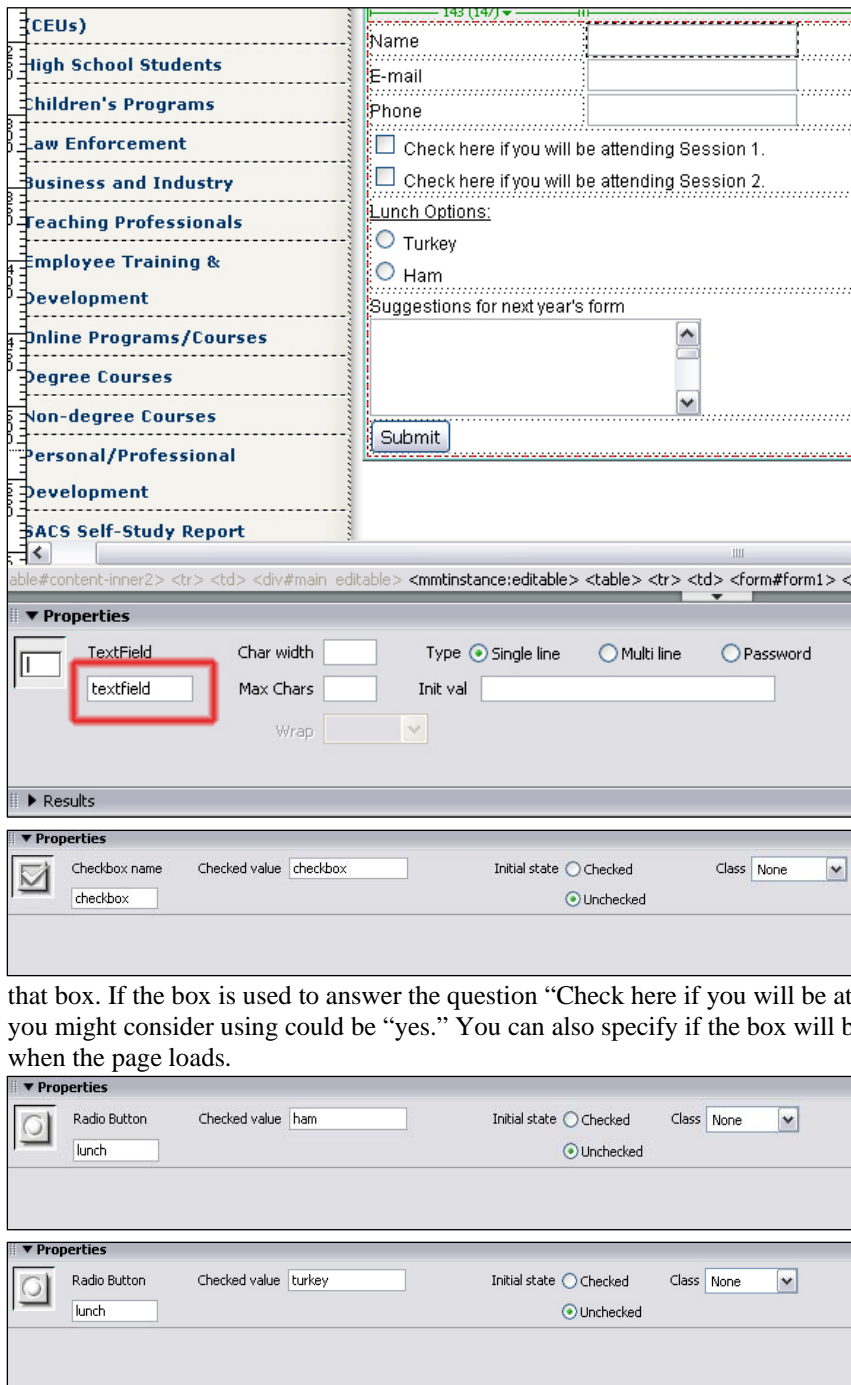
Once you have added the fields and questions to your form, it will look something like this: (Note: using a table to help organize the page will improve the appearance of the Web page.)

A screenshot of a completed web form. The form is organized into a table with three columns. The first column contains labels for the fields: "Name", "E-mail", "Phone", "Lunch Options:", and "Suggestions for next year's form". The second column contains the corresponding input fields: a text box for Name, a text box for E-mail, a text box for Phone, two checkboxes for Session 1 and Session 2, radio buttons for Turkey and Ham, and a text area for suggestions. The third column is empty. At the bottom of the form is a "Submit" button.

Does your form look like this?

If the form you are working on doesn't look very organized, insert a table from the Insert menu and play around with putting the questions and fields in separate table cells.

After you get all the inputs on the page arranged as you want them, you will then have to name each input so that you will know which is which when the results are e-mailed to you. To name the input, click the box (or button, list, etc.) and the properties box at the bottom of the page will change to let you modify the options.



The screenshot displays a web form editor interface. On the left, a vertical sidebar lists various categories: CEUs), High School Students, Children's Programs, Law Enforcement, Business and Industry, Teaching Professionals, Employee Training & Development, Online Programs/Courses, Degree Courses, Non-degree Courses, Personal/Professional Development, and SACS Self-Study Report. The main area shows a form with fields for Name, E-mail, and Phone. Below these are two checkboxes: "Check here if you will be attending Session 1." and "Check here if you will be attending Session 2." Underneath are radio buttons for "Lunch Options": Turkey and Ham. A scrollable list titled "Suggestions for next year's form" is also present, followed by a "Submit" button. At the bottom, three property boxes are shown. The first is for a "Text Field" with a red box around the "textfield" name field. The second is for a "Checkbox" with "checkbox" as the name and "checkbox" as the checked value. The third is for a "Radio Button" with "lunch" as the name and "ham" as the checked value. The fourth is another "Radio Button" with "lunch" as the name and "turkey" as the checked value.

Text Field

The properties box at the bottom of the page changes from the default text properties box to the Text Field property box. To rename the field, click in the box on the left (outlined in red below) and rename the field. On this properties box, you also have the option of changing the length of the box (Char width field) and the maximum number of characters allow (if, for instance the user is limited to a 9 character pin number.) Note that changing a single line to a multi line will actually change the text field into a text area.

Check Box

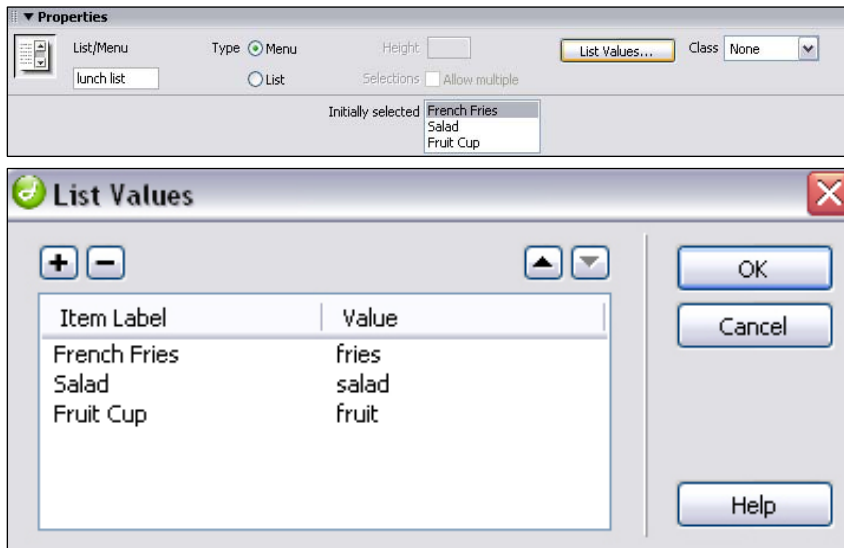
The check box properties allows you to rename the check box and specify a value (yes, no, etc.) for

that box. If the box is used to answer the question "Check here if you will be attending Session 1" the value you might consider using could be "yes." You can also specify if the box will be checked automatically when the page loads.

Radio Button

The radio button properties works like the check box properties, except for radio buttons to work as a group (e.g., so users can only select one of the options) the name must be the same for each radio button in the group. Only the

checked value changes between the buttons, as seen in the screenshot above.

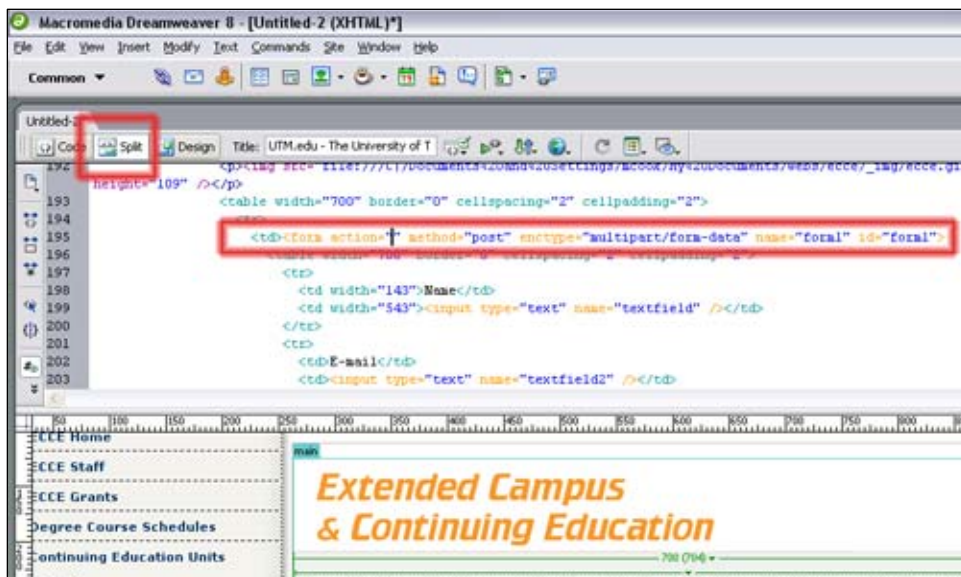


Menu/List

The menu or list properties box allows you to rename the menu/list just like other inputs, but also lets you select to make the input a list or a menu. A menu only allows for one selection; a list shows multiple choices and allows for multiple selections. The List Values... button lets you type in the choices a user will have. The Item Label is the text they will see in the form; the value is the text that will be e-mailed to you.

Step 5. Setting the form to send.

The final step in setting up a form is to set the action that will happen when the user hits the Submit button. This requires a separate file to process the form, and the one we use is a free PHP script from <http://www.webligo.com/download.php?x=dyna>. You will need to download the zipped file and then unzip the package. The most important file is the `dynaform.php` page which contains the instructions for how to set up the form processor. This file will need to be copied into the default Web folder for your Web site, and then opened in Dreamweaver. You will have to view the code to edit the file, but the instructions in the code are easy to follow. The main part you need to fill out is the e-mail address section where you will specify what e-mail to send the form results to. If you need help with the form processor, call the Instructional Technology Center 731-881-7877.



After setting up the form processor, close `dynaform.php` and open the form page in Dreamweaver. You must specify where to find `dynaform.php`. You will need to view the HTML code, so click on the Split view. Find the beginning of the form code

(it will be in orange text, by Dreamweaver's defaults; see above for an idea of where the `<form>` code is) and click between the quotations marks after the word `action`. If `dynaform.php` will be in the same folder as the form page, type in `dynaform.php`. If `dynaform.php` is going to be kept in another Web folder, you will need to specify the address to the form (such as <http://www.utm.edu/departments/ecce/webforms/dynaform.php>). The only other aspect you might want to change is the name of the form, which defaults to `form1`. Finally, upload both pages to the Web server.

III. PDF Forms

A. Uses of a PDF form

A PDF form is a useful document that has both advantages and disadvantages over other types of forms. The PDF form is easier to create than an HTML form and requires no knowledge of scripting. The PDF form is also more secure than a Web-based form, as it is possible for a spammer to use a Web-based form to send false responses to an e-mail account very quickly. The PDF prevents this by requiring the user to either e-mail the form results as an attachment or print the form and submit the paper version through mail or fax. The PDF form also allows digital signatures and encryption of the form, making it the standard choice for secure transmission of more sensitive information. The disadvantages are that the user must own the Adobe Acrobat 7 Pro or later. This means that the user must spend several hundred dollars before beginning to make forms. The user must also make sure to purchase the Professional version of the software – the standard version of Acrobats 7, 8, and 9 are not built to support form creation.

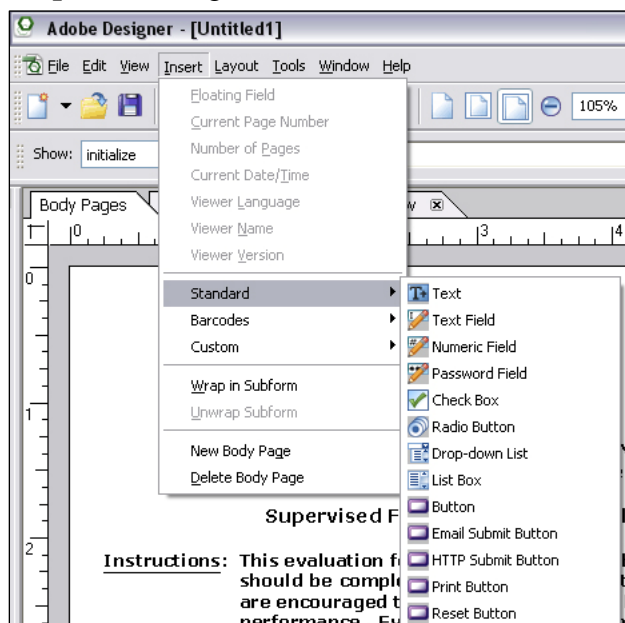
At its simplest, forms can be created directly in Acrobats 7 through 9, but the best way to edit and create PDF forms is to use Adobe LiveCycle Designer, a companion program to Acrobat that comes with the purchase.

B. Creating a PDF form

Step 1. Open a PDF in LiveCycle Designer.

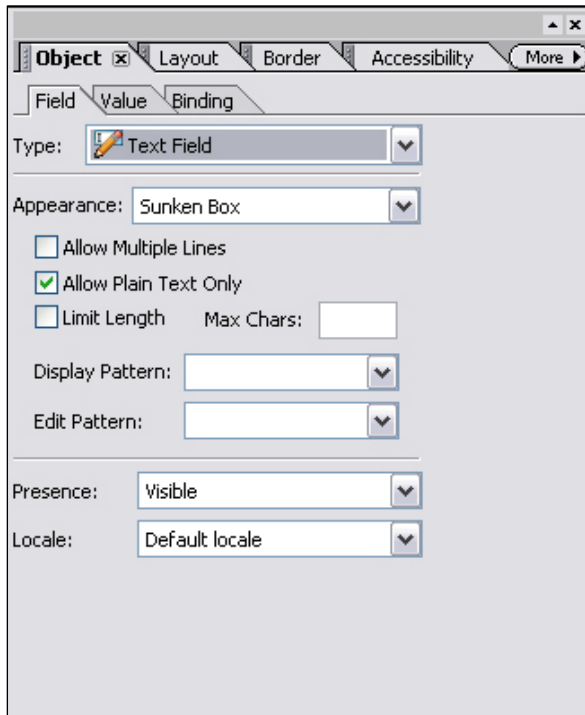
To open LiveCycle Designer, go to the Start button (on PC) or Application folder (on Mac) and navigate to the Adobe folder. There you should find Acrobat and in the same folder will be Adobe Designer. Click to open the program and then open the PDF you will turn into a form. The New Form Assistant dialog box will come up and ask to specify the PDF you wish to convert. Click next, and then select Preserve Appearance on the next screen. Click next again, and then select the return method you would like to be used with this form (submitted by e-mail, printed, either/or). Click next, and if prompted enter an e-mail address to send the file to. Then click finish. If a Missing Fonts dialog box opens, press OK.

Step 2. Inserting fields.



Inserting fields in Adobe Designer is just as easy as in Dreamweaver. From the Insert menu at the top of Designer, go down to Standard and click on any of the types of inputs to insert a form input. You can then move the input to the correct location by clicking the input and then moving it with the mouse. **Please note** that by default the input will have a label attached with it that you will want to remove. Click the text that appears to the left or right of the input and delete it to remove.

Step 3. Finalizing the form.



Modifying the name, appearance, and default values of the inputs can be done from the Object tool box (open from the Window menu if you do not see the object toolbox). The Layout and Border toolboxes are also useful to laying out the PDF as you want it to appear.

Once you are finished putting the inputs on the page(s), save your work. This creates a new PDF file that can be put on a Web server and then attached as a link to a page on your Web site or e-mailed to users to fill out. If you need help with these steps, call the Instructional Technology Center at 731-881-7877.

IV. Resources

World Wide Web Consortium info on HTML forms: <http://www.w3.org/TR/html4/interact/forms.html>

Adobe Dreamweaver: <http://www.adobe.com/products/dreamweaver>

Adobe Acrobat Pro: <http://www.adobe.com/products/acrobatpro/>