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CalState S4

A project of the CSU Center for Community Engagement
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Forms

Forms (or “online forms”) are electronic forms created within CalState S4. These can be required to be filled out when creating a placement. They can be applied to all students in a program, or shown to a specific set of students. There are several benefits to creating Forms; You can:

- Capture data and create compelling reports from the submissions
- Include digital signature or check-off box for confirmation/approvals
- Save more trees!

Every campus and department has numerous forms they need students, faculty, and community partners to complete. These tend to be risk management forms, agency agreements, or site visit checklists. CalState S4 comes with some default Forms templates that are typically applicable to the business practices of most CSU campuses/programs. Program Staff can modify these Forms and/or create new forms to meet their individual program or campus’ needs.

There are some very special use cases where you may need to provide a PDF of a paper form due to an existing business process (or while waiting for approval to take said process online). However, in these rare cases, CalState S4 does provide program-level space for uploading forms for download in the event you cannot store the file on your campus website. **Downloadable forms** exist as a PDF (usually created from a Word file, or scan of a paper form) and can be shown to a student during their sign-up or, more commonly, you can capture the direct link to the PDF and provide it wherever necessary. This method is **highly discouraged** and we suggest [contacting support](#) before adding download forms to your program.

Accessing Forms

The **Forms** tab in the main navigation is only viewable by users with the Program Staff role. This section is designed for staff to easily manage their Forms and access form submissions. Students, faculty, and community partners only access forms by having the form provided during the appropriate task, such as during the sign-up process or in a notification email.

Types of Forms

CalState S4 has two main types of Forms — Custom Forms, which are divided into several categories and can be attached to a user’s placements, and Framework Forms. When you are creating a Custom Form you can identify what category of form it is:

Custom Forms

- **Sign-up** – If a form is identified as a sign-up form, then it will be shown to the student during the sign-up process if it is marked as enabled. It can also be made required for placement so that students are not placed until the form is completed.
- **End of Placement** – these are also attached to a student’s placement record, but can be scheduled to be shown to students at a later date. View the [End of Placement Forms section](#) for more information.
- **Other** – Forms identified as “other” and filled out by an authenticated user are held as part of a user’s profile, and can be accessed from the user’s profile page.
- **Supplemental** (formerly Additional Signature) – this is a special type of form that is only used as an addition to an existing Custom or Framework Form. Once created, it is identified on the “parent” (i.e. original) form. Supplemental Custom Forms are most often used when multiple people need to complete a form, but they can also be used for any scenario where you need to review or include additional information to a form completed by another user. For more info, please review the [How and When to Use a Supplemental Custom Form HelpDoc](#).
- **Contract** – as the name states, this is to identify any contract/agreement forms your campus/program may have. For more information [read the Agreements overview](#).

◆ Expiration Set-up

Either add a date component with **contract_exp** as the [form key](#) or set the default expiration years (based on submission date) in the form setting. *See below.*

Edit questions Conditionals Form validation E-mails E

Label Required

Expiration Date

This is used as a descriptive label when displaying this form element.

Short computer name Required

contract_exp

Title Required

University Organization Agreement

Program - None -

Form category Required Contract

Expiration

5

years from submission date

OR

Framework Forms

A form that can be filled out with vital information needed to populate a new site record (or update an existing one) in CalState S4. Go to the [Framework Forms section](#) for detailed information. Currently these forms are created by S4 Staff for a campus.

Form Templates in CalState S4

The following Forms templates are available to any program using CalState S4, and are based on the forms recommended by the Chancellor’s Office. These forms can be modified by campuses to fit specific needs of the campus. They can also be cloned if multiple programs are going to use the same form(s).

- **Release of Liability** – for student placements. The default form includes a section to confirm participant age, and give instructions to minors.
- **Learning Plan Agreement and Participation Guidelines** – This online version will allow programs to transition from a paper version to an online form that can be fully completed online. If multiple people need access to sign the form, the use of a [Supplemental Custom Form](#) can accommodate this.
- **Request to Initiate Partnership** – this is a Framework Form for new community partners to be able to fill out to give you details about the organization. The default form can take the information provided by the community partner and use that to populate a new parent/program site, opportunity, or site staff in CalState S4.

Configuring Forms

Question Types/Form Components

All forms have several different question types, or **form components**, available for use.

Component Settings

- **Label** — this is the external name and/or question text of the component (visibility and layout settings are in the display section)
- **Form Key** — this is the internal name used by the code. It is a unique (per form) that allows the system to identify what information it contains. These are what allow for auto-population of content fields from [Framework Forms](#).
- **Default value** — text that will be already added to the field when a user loads the form
- **Description** — text to provide the user to help them complete the field or explain how/why to complete it (visibility and layout settings are in the display section)
- **Validation** — settings that will trigger errors and stop a user from submitting (but not from saving a draft)
 - *Required* — force the user to complete this field; we recommend not setting a default value if a field is required, so we are sure a user sees the question and knowingly answers it.
 - *Unique* — require that the data provided in this field is unique to this form (based on existing submissions). This is rarely used, but could be helpful if you want to avoid duplicate entries on a form that anonymous users can complete (e.g. Student ID).
 - *Maxlength/Minlength* — these two options allow you to set minimum/maximum character limits on a field. Not often used, but can be useful with a [Number](#) component that has a predetermined length.
- **Display** — a set of options to show/hide the label and description, as well as component-specific settings for which more information can be found at the link below.
 - *Placeholder text* — similar to the default value in appearance, but when a user clicks on the field, the text disappears. Great to use instead of, or in conjunction with, a description.
 - *Show the question text* — this is where you set whether or not to show the label, and if it is shown, whether the label sits above the rest of the question, or in-line with it.
 - *Description above field* — render the description text before the label
 - *Disabled* — used in conjunction with default value, disable the question so you can capture information you know won't change and/or don't want the user to change.
 - *Private* — for internal fields/values/information, this setting will make the field only visible/accessible for the form creator and anybody with access to the [Results tab](#) of the form.
 - *Wrapper CSS Classes/CSS Classes* — these two settings are for advanced use only.

For additional information on each component type, explanations of component-specific settings, and when to use each component, see the [Form Components help documentation](#).

Submission Review Setup

If you want to include administrative review fields on submissions (see screenshot below), you have to add some specific components to your form. Framework Forms will usually have this setup by default.

Submission Status
Submission updated ▾

Staff Notes
Discussed with Frank and we completed an addendum. His new attribute has been identified!

Last updated: 10-28-2020 10:06am
✓ Update

← Return to list of submissions

CSU Community-Engaged Learning Tool

View Delete

Download PDF

Additional Signature Forms
✓ CSU Community-Engaged Learning Tool Addendum

Course Info

GENERAL CEL COURSE INFORMATION

Please answer the following questions for the community-engaged learning (CEL) course for which you are completing this framework.

Faculty First Name Frank
Faculty Last Name Faculty
Campus CSU Point Reyes
Campus Contact SL Director
Campus Email brianna+director@calstates4.com
Email support+facultypr2@calstates4.com
Course Title Underwater Basket Weaving

Step 1. Add the Submission Review “collection of questions” component, required settings below.

Submission Review Collection of questions ▾ ☐ + Add

- Form Key:** submission_review
- Display:** check the box for **Hide Label**

Step 2. Add the Submission Status “list” component, required settings below.

Submission Status List ▾ ☐ + Add

- Options:** add the different types of statuses for your process, including a **minimum of two options** and identify a default
- Display:** check the boxes for **Listbox** and **Private**

Step 3. Add the Staff Notes “paragraph text” component, required settings below

Staff Notes Paragraph text ▾ ☐ + Add

- a. **Display:** check the box for **Private**

Step 4. Move Approval Status and Staff Notes under Submission Review by clicking on the cross image, and dragging it to the right.

+	Submission Review	submission_ review	Collection of questions	-		Edit	Clone	Delete
+	Submission Status	submission_ status	List	0	<input type="checkbox"/>	Edit	Clone	Delete
+	Staff Notes	staff_notes	Paragraph text	-	<input type="checkbox"/>	Edit	Clone	Delete

+	Submission Review	submission_ review	Collection of questions	-		Edit	Clone	Delete
+	Submission Status	submission_ status	List	0	<input type="checkbox"/>	Edit	Clone	Delete
+	Staff Notes	staff_notes	Paragraph text	-	<input type="checkbox"/>	Edit	Clone	Delete

Step 5. Click **Save** at the bottom of the page.

Step 6. Confirm the fields are showing up on the Results tab of the Form

CSU Community-Engaged Learning Tool

View Edit Configure form **Results** Node export

Submissions Analysis Table Download Clear

Showing 1 - 1 of 1.

Completed between **Submission Status** Choose an option

And

Write date as: YYYY-MM-DD. Note: Filter will not include submissions ON the dates you use, so make sure to add/subtract a day.

#	Last Modified	Completed	User	Operations	Submission Status	Staff Notes	Attached Submissions
1	10/28/2020 - 10:06am	10/22/2020 - 11:09am	facultypr2	view edit delete	Submission updated	Discussed with Frank and we completed an addendum. His new attribute has been identified!	SID: 304015

Validation Rules

This subtab on a form allows you to configure extra requirements on certain question types so you can get exactly the type and/or amount of data you need (e.g. minimum number of words on a student reflection question). The screenshot below shows the different types of rules available, scroll down for a summary for each rule type and configuration details.

Note: Each rule has specific question types it can be used on, so if all of the component types associated with a rule haven't been added to the form the rule name will be grayed out and will have "(not currently available for this form)" added to the rule name to indicate it isn't applicable. **Rule types E through H can only be used on List questions** (e.g. checkboxes, radios, or drop-downs).

Edit Questions Conditionals **Validation Rules** E-mails Export Settings Import

No validation rules have been added to this form, use the list below to add some.

Add a validation rule

Click the name of a rule below to add, assign components and configure settings.

Valid URL **A**

- Validates that the user-entered data is a valid URL.
- Works with:** single-line text

Maximum number of words **B**

- Verifies that a user-entered value contains at most the specified number of words.
- Works with:** paragraph text, single-line text

Minimum number of words **C**

- Verifies that a user-entered value contains at least the specified number of words.
- Works with:** paragraph text, single-line text

Compare two values **D**

- Compare two values for greater than (>), less than (<), greater than or equal to (>=), or less than or equal to (<=).
- Works with:** date, email, number, list, paragraph text, single-line text

Maximum number of list option submissions (not currently available for this form) **E**

- Limits the amount of times a list option can be submitted. Useful for allowing users to select something with a finite amount across all submissions like a shift time or t-shirt size.
- Works with:** list; *none present in this form*

Maximum number of selections allowed (not currently available for this form) **F**

- Forces the user to select at most a defined number of options from the specified webform components.
- Works with:** list; *none present in this form*

Minimum number of selections required (not currently available for this form) **G**

- Forces the user to select at least a defined number of options from the specified webform components.
- Works with:** list; *none present in this form*

Exact number of selections required (not currently available for this form) **H**

- Forces the user to select exactly the defined number of options from the specified webform components.
- Works with:** list; *none present in this form*

Validation Rule Types

- Valid URL** — Use this to make sure that a single-line text component is properly formatted like a website address (e.g. <https://calstates4.com>). It does not check if the URL actually exists. This rule type

also has the “negate” option which checks if a valid URL is found and returns invalid if there *is* a URL.

- B. **Maximum number of words** — Limit the amount of words a user can submit in a field, great when you want to keep things short and sweet. **Note:** Enabling this will add some custom settings on all selected components to allow a word countdown indicator on the form. The text will remain black while under the limit, and then turn red and show a negative number if the user has gone over the word limit.

Additional comments, feedback, or :
150 words remaining.

Additional comments, feedback, or :
-7 words remaining.

- C. **Minimum number of words** — Require a minimum amount of words a user must submit in a field, great when you want to make sure a user provides a detailed response. **Note:** Enabling this will add some custom settings on all selected components to allow a word count indicator on the form. The text will remain red as it counts down the required amount, then turn black when the submitter reaches the minimum word count.

What were you most satisfied with in :
90 words needed.

What were you most satisfied with in :
92 words.

- D. **Compare two values** — Provide a value to compare selected questions to using greater than (>), greater than or equal to (>=), less than (<), less than or equal to (<=). Used rarely, can be helpful for comparing numbers/dates.
- E. **Maximum number of list option submissions** — Provide a total limit of times a specific option in a question can be submitted. This is very useful for forms allowing users to indicate their preference

when there is a limited amount (e.g. shift times).

Please choose which shift you would like to work.

- ☐ Sunday, April 18 1:00 - 5:00pm
- ☐ Sunday, April 18 1:00 - 5:00pm
- ☐ Tuesday, April 20 9:00am - 12:00pm
- ☐ Wednesday, April 21 9:00am - 12:00pm

The option will be disabled if the limit has been reached

- F. **Maximum number of selections allowed** — On list components that allow multiple selections, limit how many selections someone can make (e.g. pick up to 3 colors).
- G. **Minimum number of selections required** — On list components that allow multiple selections, require a minimum number of selections (e.g. pick at least 5 concepts).
- H. **Exact number of selections required** — On list components that allow multiple selections, specify exactly how many someone must make (e.g. pick exactly 2 foods). This rule type also provides a “negate” option which, using the previous example would check to make sure a user selected anything *but* two options (e.g. 1 or 3) this setting is rarely used.

Common Validation Rule Settings

The two main settings that every Validation Rule has are **Rule Name** and the selected **Components**. Make sure to give the rule a descriptive name that lets you, and anybody else who may need to manage the form, know what the rule is doing. Check the box next to all available components you wish to apply this rule to. Remember to click **Add rule** if creating a new rule or **Save rule** if editing an existing rule.

Rule name Required

Components

☒ Please choose which shift you would like to work.

☐ Are you a transfer student?

☐ Please select your shirt size

☐ Have you volunteered with us before?

☐ How did you hear about this event?

+ Add rule [Cancel](#)

“Maximum number of list options” Additional Settings

For this Validation Rule type there are additional settings you must set **on the individual questions**. You need to identify what the option limits are in order to complete the rule configuration.

Step 1: Create the Validation Rule for “Maximum number of list options” by clicking on the rule name. Give your rule a name that briefly describes what the validation will be (make sure this is descriptive but succinct). Next, Check the box next to the question(s) you would like to set the limits on. In our example we are using the list question “Please choose which shift you would like to work.” Click [+ Add Rule] to save the rule and go to Step 2.

Step 2: Go to the component edit page by clicking the **Edit questions** tab and then **edit** next to the component you need to update.

View

Edit

Configure form

Results

Revision operations

Edit Questions

Conditionals

Validation Rules

E-mails

Export

Settings

Show row weights

Label	Form Key	Type	Value	Required	Operations
+ Directions	directions	Additional directions	<p>The CSUPR Center for...	<input type="checkbox"/>	Edit Clone Delete
+ First Name	first_name	Single-line text	-	<input type="checkbox"/>	Edit Clone Delete
+ Last Name	last_name	Single-line text	-	<input type="checkbox"/>	Edit Clone Delete
+ Email Address	email_addresses	E-mail	-	<input type="checkbox"/>	Edit Clone Delete
+ Telephone number	telephone_number	Number	-	<input type="checkbox"/>	Edit Clone Delete
+ Emergency Contact Name	emergency_contact_name	Single-line text	-	<input type="checkbox"/>	Edit Clone Delete
+ Emergency Contact Number	emergency_contact_number	Number	-	<input type="checkbox"/>	Edit Clone Delete
+ Please choose which shift you would like to work.	shift	List	-	<input type="checkbox"/>	Edit Clone Delete
+ CSU Point Reyes Affiliation	csupr_affiliation	List	-	<input type="checkbox"/>	Edit Clone Delete

Step 3: On the component edit page click the **Enable select option limitation** checkbox under the **Select option limitation** header. More settings will become available.

Select option limitation (click to close)

☐ Enable select option limitation

Step 4: Click the **Copy select options** button to insert a list of formatted option keys ready for you to add limits.

Select option limitation (click to close)

☒ Enable select option limitation

Select option limitation number **Required**

Key-value pairs **MUST** be specified as "option_key|number of selections allowed for this option". Specify the limit for each option on its own line. The Copy select options button below will insert a formatted list of option keys. If an option has no limit remove it from the list. If all options have the same limit, you can use "all|shared number of selections allowed".

1|
5|
3|
4|

These are the formatted option keys

Click this button to insert all of the option keys in the proper

Copy select options

Select option limitation (click to close)

☒ Enable select option limitation

Select option limitation number **Required**

Key-value pairs **MUST** be specified as "option_key|number of selections allowed for this option". Specify the limit for each option on its own line. The Copy select options button below will insert a formatted list of option keys. If an option has no limit remove it from the list. If all options have the same limit, you can use "all|shared number of selections allowed".

1|15
5|15
3|10
4|10

Add the limits for each of the question options to the right of the | character

Copy select options

Step 5: If you have the same limit for ALL options, you can use a simpler setup simply using the format "all|some shared limit" to apply the same limit to all options.

Select option limitation (click to close)

☒ Enable select option limitation

Select option limitation number **Required**

Key-value pairs **MUST** be specified as "option_key|number of selections allowed for this option". Specify the limit for each option on its own line. The Copy select options button below will insert a formatted list of option keys. If an option has no limit remove it from the list. If all options have the same limit, you can use "all|shared number of selections allowed".

all|15

If all options have the same limit, you can use this notation instead

Copy select options

Email Settings

You can also set up automated emails that will be triggered after each submission of the form. Access the email settings from the **Configure Form** tab.

The screenshot shows the 'Configure form' tab with sub-tabs: Edit questions, Conditionals, Form validation, **E-mails**, Export, Form settings, and Import. The 'E-mails' tab is active, showing a table of email configurations. A red arrow points to the 'E-mails' tab. A red box highlights the 'Add' button and the 'Address' field in the 'Add' dialog.

Enable	Email From (Reply-to)	Email Subject	Email To (Recipient)	Operations
<input checked="" type="checkbox"/>	"CalState S4" <support@calstates4.com>	RTIP Submitted:	brianna+prsc@calstates4.com	Edit Clone Delete
<input checked="" type="checkbox"/>	"CSUPR Center for Community Engagement" <brianna+prsc@calstates4.com>	Your Request to Initiate Partnership with CSU Point Reyes was received!	Value of "Main Contact Email"	Edit Clone Delete
<input checked="" type="checkbox"/>	New notification email from	New notification email subject		

Address:

☐ **Component value:**

+ Add

To add an email to the form, start by putting an email address in the **Address** field, and click **+Add**.

Basic Email Configuration

Email To (recipient) — the email address receiving the automated email

Email To (recipient)

This is the email address the message will be sent to. The component option allows you to have this field generated by the person submitting the form. Multiple e-mail addresses are allowed and should be separated by commas.

☒ **Custom:**

☐ **Component:**

☒ **Enable sending**

- **Custom** — provide an email address or addresses (separated by commas)
- **Component** — select a question from the form you want to use for the email address (e.g. if you want to send an email to an address that is provided by the person submitting the form. Also used for [conditional emails](#).)

Email Header Details — Email Subject

E-mail subject

☐ Default: *Form submission from: Request to Initiate Partnership*

☒ Custom:

☐ Component:

- **Default** — will just use the form title with the word “Form submission from:” prepended
- **Custom** — write a custom name, you can use [tokens](#).
- **Component** — identify an field in the form you want to use as the subject line

Tokens

[submission:values:**email**]

The bold and underlined part above (e.g. email) is the [form key](#) of the component whose response you want to use. The form key must be exactly the same in the token for it to work. Examples of use are in the Conditional Email Configuration section below.

Edit questions Conditionals Form validation E-mails Ex

Label Required

Form Key Required

Default value

Note: If the field you are using as a token is inside a [Collection of Questions](#) you **must** include the form key of that as well, separated by a colon e.g. [submission:values:collection_form_key:**email**].

Conditional Email Configuration

Emails can also be conditionally sent based upon a user’s responses:

1. Pick the list question you want to be the trigger, **Confirmation of Age** in the example, then click **+Add**

The screenshot shows the 'E-mails' tab in a configuration interface. At the top, there are tabs for 'Edit questions', 'Conditionals', 'Form validation', 'E-mails' (selected), 'Export', 'Form settings', and 'Import'. Below these are columns for 'Send', 'E-mail to', 'Subject', 'From', and 'Operations'. A table lists existing email rules, with one rule selected: 'Value of "Confirmation of Age"'. Below the table, there is a 'Component value:' dropdown menu with options: 'Description', 'Description Format', 'Placement', 'Program Site', and 'Confirmation of Age' (highlighted). A '+ Add' button is visible to the right of the dropdown. A 'Save' button is at the bottom left.

2. On the email configuration page, put the recipient email address (this can also be a token to use an email field from the submission) in the option for the response you want to trigger the email.

The screenshot shows the 'Component' dropdown set to 'Confirmation of Age'. Below it, the 'Component e-mail options' section is visible. It states: 'The selected component Confirmation of Age has multiple options. You may enter an e-mail address for each choice. When that choice is selected, an e-mail will be sent to the corresponding address. If a field is left blank, no e-mail will be sent for that option.' Below this, there are two rows for options. The first row has the option 'I confirm that I am 18 years of age or older.' and the email address 'email@example.com'. The second row has the option 'I am under 18 years of age' and the email address '[submission:values:student_mail]'.

3. Then fill out the rest of the information as explained in the previous section (this will link back).

The screenshot shows the 'E-mail template' configuration page. It has a title 'E-mail template (click to close)'. Below the title, it says 'An e-mail template can customize the display of e-mails.' There is a 'Custom template' dropdown menu. Below that, it says 'Browse available tokens.' and shows a text area with the following content: 'Dear [submission:values:student_name],

You have one final step to complete your placement paperwork. Please contact the CSU Point Reyes Community Engagement office for next steps.

Thank you,
CSUPR CCE'.

4. If you want to trigger a different email for a different response, just clone this rule and put the email address(es) — you can put multiple email addresses by separating them with a comma — in the appropriate response box (and make sure to remove stuff from the other response boxes that came over from the clone).

Form Settings

Drupal provides a wide-array of configuration settings that are **common across all Forms**. Below are brief explanations and guidance on how/when to use these settings. These settings can be found either by clicking on the **Form Settings** button next to the form on the **Forms** list page, or by clicking on the **Configure Form** tab, then clicking on the **Settings** subtab.

View Edit **Configure form** Results Revision operations Node export

Edit questions Conditionals Form validation E-mails Export **Form settings** Import

Submission Settings

Confirmation Message

Edit questions Conditionals Form validation E-mails Export **Form settings** Import

Submission settings (click to close)

Confirmation message

`<p style="font-size: 1.5em">Thank you for your interest in partnering with our university. We will review and retain your submission to determine next steps.</p>`

Enable rich-text

Full HTML

Message to be shown upon successful submission. If the redirection location is set to *Confirmation page* it will be shown on its own page, otherwise this displays as a message. Supports Webform token replacements. Browse available tokens.

Per user submission limit

Recommended to be set as seen below, this will help cut down on double-clicks causing a second empty submission of the form.

Per user submission limit

Limit the number of submissions *per user*. A user is identified by their user login if logged-in, or by their IP Address and Cookie if anonymous. Use of cookies may be modified in the global [Webform settings](#).

☐ Unlimited

☒ Limit each user to submission(s)

Submission Access

This setting is what determines who can view and complete this form. The screenshot below shows configuration to allow for **anybody** to submit the form, logged in or anonymous.

Note: When creating certain Custom Forms (e.g. Signup or Supplemental) required roles are automatically checked. If a user cannot access a form, this is likely the setting that needs to be fixed.

Submission access *(click to close)*

Roles that can submit this webform

- ☐ administrator
- ☒ anonymous user
- ☒ authenticated user
- ☐ community partner
- ☐ faculty
- ☐ form editor
- ☐ keymaster
- ☐ manage partners
- ☐ program staff
- ☐ student
- ☐ super faculty

How to Create a Custom Form

1. Click the **Forms** tab in the main navigation, and then click the green **Create new Custom Form** button in the upper right.
2. Give the form a recognizable and meaningful **Title**.
3. Select the **Program** that this form is affiliated with, if applicable. If no program is selected, the form will be listed at the top of the Forms list under Campus-Level Forms.
4. Select **Form category**.
 - a. *Sign-up* forms will appear during the Placement process. Can be set to **enabled** or **required**.
 - b. *End of Placement* forms, when enabled, will show up as a Pending Task on a user's dashboard.
 - c. *Other* forms will be attached to a user's profile. **Note:** If "Show form on placements" is checked the form will show up on a student's placement page and completing it will require a Placement ID.
 - d. *Contract* should be selected when the form will act as a University-Agency Agreement. **Important:** this form type *must* include a Site NID component, outlined in the [Online Execution Setup HelpDoc](#).
 - e. *Supplemental* formerly Additional Signature, this is a special form type that is connected to another form and can be used to allow multiple signatures on a form, set up a review process, or connect two forms together so that the form (e.g. Student Self Evaluation and Faculty Student Evaluation). [Read more about how and when to use Supplemental Custom Forms](#).
5. Click **Save**.

Once you have created the initial form, the **Configure Form** tab will appear and give you access to add questions to the form. For more detailed information about the different component types, see the [Form Components documentation](#).

Note: Sometimes it can take a few minutes for the Forms list to update, so if you don't see your newly created form just take a break and check again after 5 minutes. If your form is still not showing up, contact the HelpDesk.

Tips for creating Forms

For instructions and tips about the details of creating a new Forms, see the separate support document: [Form Creation in S4: Tips and Help](#).



Enabling and Disabling Forms

Sign-up forms and End of Service forms in particular can be enabled and disabled. This is helpful if you are drafting a new Forms, but do not yet want it to show to students.

If a form is enabled, signup forms will show up as part of the student placement process for any *current placement*. End of service forms will also show up as a pending task on the student's home page for any student in that program with an current placement.

If a form is disabled, it will not show up in the placement process. Sign-up forms will not be shown, and end of placement forms will not be shown to students with a current placement.

Note: Only current and future placements are affected. Past placements are not affected.

To enable a form select the form, select edit, and click on the enable box.

Managing Form Settings in your Program

You can see what forms are affiliated with your program by selecting **Manage Programs** from the Staff homepage dashboard. Click your program's name in the list, and on the program page you will see which forms are currently associated with your program, both Forms and downloadable forms:

Add Form-type Instructions

Select **Edit** from the program tab. Add instructions in the appropriate fields. These instructions will show up when listing these types of forms both during placement as well as on the Placement page after creation.

Instructions for other forms (not sign-up forms) - it is best to add those instructions as a field within the form itself, using “additional directions” field (additional information can be found in the [Form Components HelpDoc](#)).

The screenshot shows the 'Service Learning' program page. It has tabs for View, Edit, Manage display, Node export, and Devel. Under the 'Web Forms' section, there is a table with columns for form name, type, edit button, submissions count, and a 'Required for placement' status. The forms listed are: Emergency Contact Information (Signup, 1 submission, required), Evaluation Form (Evaluation, 0 submissions, not required), General Liability Waiver (Other, 1 submission, not required), and Release of Liability, Service Learning (Signup, 0 submissions, required). Below this is the 'Add Download Form' section with two forms: Learning Plan Agreement (Signup, 0 downloads, required) and Service Learning Time Log (Signup, 0 downloads, required). On the right, there is a section for 'Address Campus' with the name 'CSD Hatch Hatchy'.

Uploading PDF Forms — NOT RECOMMENDED SEE NOTE BELOW

NOTE: This option should only be used in very specific circumstances. To determine if you should use this feature, follow the guidance in the [Linking to PDFs in S4 help documentation](#).

How to link to “other” Forms

You may want to create forms that are not part of a student's placement. Any “Other” Custom Form submissions created while a user is logged in can be viewed within the user's profile (users with the Program Staff role can click on the **Users** tab and search a list of campus users to find the profile).

If you do want an “Other” form to show on a placement, you can enable this by checking the box to **Show on student placements** on the form's edit page.

You can send the link to the form directly to users. However, keep in mind that if the form requires that the submitter be signed in, they will get an access denied message if they are not signed in.

You can add a hyperlink in many areas on S4. For example, in the Program Site “Program information” section, to add a hyperlink:

1. Highlight the text you want to link.

The screenshot shows the 'Program information' section. It has a text area with the text 'This information will only be seen by students involved with'. Below the text area is a rich text editor toolbar with buttons for Bold (B), Italic (I), Underline (U), Bulleted list, Numbered list, Undo, Redo, Text color (Normal), and a checkmark. A purple circle highlights the 'Link' icon in the toolbar. Below the toolbar, the text 'This is a hyperlink' is shown with a blue underline.

2. Click on the icon in the toolbar that looks like a chain link — a pop-up window will appear.
3. Paste the web address (URL) of the form (found when you are the Form's page)
4. Click **Save** on the pop-up
5. Save the page you are editing

How to View Form Submissions

View all submissions of a single form

You can access a form's list of submissions tab by clicking on **Submissions** next to the form on the **Forms** list. You can also access this page by clicking on the **Results** tab while viewing the form.

On this page you have the ability to see all of that form's submissions in a list with information and additional links to manage individual submissions. If drafts are enabled, you will be able to re-open submissions that have already been submitted. If you have emails configured, you will have the option to retrigger sending the emails, including selecting which emails to resend.

View
Edit
Configure form
Results
Revision operations

Submissions
Analysis
Table
Download

Showing 1 - 8 of 8.

Completed between

And

Write date as: YYYY-MM-DD. Note: Filter will not include submissions ON the dates you use, so make sure to add/subtract a day.

#			Last Modified	Completed	User	Operations
10	Re-Open Draft	Resend Emails	05/07/2020 - 9:43am	05/07/2020 - 9:43am	studentpr	view
9	Re-Open Draft	Resend Emails	03/30/2020 - 12:00pm	03/30/2020 - 12:00pm	studentpr	view
8	Re-Open Draft	Resend Emails	03/12/2020 - 2:27pm	03/12/2020 - 2:26pm	studentpr	view
5	Re-Open Draft	Resend Emails	04/10/2019 - 9:57am	04/10/2019 - 9:57am	studentpr3	view
4	Re-Open Draft	Resend Emails	02/28/2019 - 6:47pm	02/28/2019 - 6:47pm	admin	view

The **Analysis** subtab provides a quick overview and breakdown of responses to list questions in graph format.

The **Table** subtab shows all results and responses in a table format, which can be helpful when you need to quickly search responses for a specific word or phrase.

The **Download** subtab you can download all results (or a subset of results) into an Excel or CSV file.

View a Community Partner's Framework Form submission

If a Community Partner has submitted a Framework Form you can access those:

1. **From your staff home page.** Newest Proposals submissions can be seen in a menu on the bottom right.
2. **From the Framework Form list** in the form tab.
3. If you have created a new site from the submission, and you have turned on the proper settings **the submission is added as a log entry in the new site** you have created (Parent Site *and* Program Site, when applicable).

Newest Proposals		
Site Name	Program	Approval Status
asdfasdf		Needs Review
asdf		Needs Review
testing this one	Service Learning	Approved
View all (3) proposals		

Site log entries		
At – Blood Mobile		
View	Edit	Log Entries
Merge	Opportunities	Placements
Site staff		
Title	Type	Expiration
Site Created from Proposal	General Note	none

View a single user's form submissions

From the **User** tab in your toolbar, you can search for an individual student. There, you will see:

- Any placements the student has. To view a student's sign-up forms, you must go into the placement record.
- Any forms that a student has filled out while signed-in.

Note: User access is restricted only to the user, program staff, and faculty who have a student in their course.

Your placements

	Program	Course	Site	Site staff	Opportunity	Dates
Placement #195	Service Learning	BIO 100 (1): Biology Education Serv Learn	S4 Support Office	Brianna Wagner	(empty)	August 20, 2014

You have no past placements.

Your Form Submissions

Form

Submitted 

General Liability Waiver

06/17/2015 - 12:23

[View Your Submission](#)

View submissions associated with a single course

Faculty may want to see if students have filled out their forms, especially if the faculty has placed the student, and the student is required to login and finish the forms to complete the process. On a course page, there is a quick view on the student list that shows if a student has completed their **required signup forms**, and if there are any required [Supplemental Custom Forms](#) you can see the status of that as well.

Select/Delete program sites

Copy program sites from a course

ART 239 (01): Art in the Community

[View](#) [Edit](#) [Student Forms](#) [Student Report](#) [Revision operations](#) [Ghost Placements](#)

User Tags

  [Apply Filter](#) [Reset](#)

Place student(s)

<input type="checkbox"/>	First Name	Last name 	Last login	Forms Completed	Signatures Completed	Placements
<input type="checkbox"/>	Anne	Anderson	03/20/2019 - 4:11pm	N/A	N/A	No current placements.
<input type="checkbox"/>	Ned	Stut	04/10/2019 - 10:13am	Yes	Yes	<ul style="list-style-type: none"> Highland Elementary School

Faculty

Displaying 1 - 1 of 1 users

Faculty, Frank

Term: Spring 2021

Program: Service Learning

Max placements per student: 1

Syllabus

[More information](#)

[Choose File](#) No file chosen

[Upload](#)

Additionally, there is a **Student Forms** tab on every course that provides a more in-depth view of the forms associated with the student placement. A student will **only** be listed on this page once a placement has been created. Forms will be listed by their name, and if it has been completed it will be linked to the submission. If it has not been completed, the name will be gray with no link.

Student Placement Forms

For — ART 239 (01): Art in the Community

View	Edit	Student Forms	Student Report	Revision operations	Ghost Placements				
<input type="checkbox"/>	Placement	First name	Last name ▲	Student E-mail	Forms	Program Site	Site Staff	Site Staff Email	
<input type="checkbox"/>	#92769	Ned	Stut	support+studentpr3@calstates4.com	<ul style="list-style-type: none"> ◦ Site Placement Orientation Form ◦ End of Service Form 	Highland Elementary School	none	none	

Framework Forms

A Framework Form allows users (such as new community partners) to submit or update information, which will then auto-populate fields in S4 during content creation/updating. The most common Framework Form is the Request to Initiate Partnership form, which is an S4-provided template that you can modify for your campus. Other types of forms would be content update forms or externally-facing registration forms. All settings for the form can be found by clicking the **Edit** tab on the form's view page.

Settings

The basic settings should be recognizable if you've familiarized yourself with [Custom Forms](#). The advanced settings toggle buttons that allow for creating, or updating existing, content.

Basic

- *Title* — The public name of the form
- *This form requires a Supplemental Custom Form* — when checked, this setting allows you to attach [Supplemental Custom Forms](#) in order to create a more detailed form process. Helps with multi-step processes that require more than one person to complete/approve/sign.
 - Signature Form — select the form(s) that you want to include as all part of the main form

Advanced

- *Show "Create Site" button on submissions* — enable this for forms that are intended to inform the creation of a Parent or Program Site
- *Show "Create Opportunity" button on submissions* — enable this for forms that are intended to inform the creation of an Opportunity
- *Show "Create Site Staff" button on submissions* — enable this for forms that are intended to inform the creation of a Site Staff
- *Show "Update Content" button on submissions* — enable this if you will be using the form to update **any** of the following types of content: Parent Site, Program Site, Opportunity, Site Staff
- *Show "Create User" button on submissions* — enable this if you will be using the form to create a user (e.g. new site staff, or a student in a program that requires paperwork before enrollment).
- *Show "Enroll User" button on submissions* — COMING SOON!
- *Show "Save as Log Entry" button on submissions* — enable this to simply attach a submission as a Log Entry to a Parent Site
- *Log Entry Category* — when creating/updating content a Log Entry will be created this allows you to select which category you'd like to give that Log Entry. [Note: Log Entry categories are customizable.](#)

Creating content from a submission

Coming Soon!

Updating content from a submission

[View the HelpDoc](#)

Framework Form tips and additional information

You can customize the Framework Form to some extent in CalState S4. See the separate document [Form Creation: Tips and Help](#) for more information on creating and editing forms. Keep in mind the following important differences when it comes to Framework Forms:

- Program Staff cannot create Framework Forms, they are cloned from a template. These forms require special settings to allow auto-population into a Parent Organization, Program Site, Opportunity, or Site Staff.
- You **must** [contact the HelpDesk](#) before you change or delete an existing form component.
- You cannot and should not change the “Form Key” field of any of the form’s components unless expressly told to do so.
- **ALWAYS** review **ALL** questions/form settings to make sure you have updated any campus-specific items. For example, when a form is cloned from the PR site, the program question will be inaccurate because it has the PR programs listed. To update, use the **Campus Programs** pre-built list so that your form doesn’t error.

- **TEST** your form before sending the link out, to catch any other unexpected errors, typos, or needed changes.

Creating a new site from a Framework Form Submission

New Framework Form submissions can be seen and accessed from the staff dashboard.

Dashboard

[View list of Partners](#)

Dashboard Actions

- [Add a new site](#)
- [Add a new user](#)
- [Manage sites](#)
- [Manage programs](#)
- [Manage opportunities](#)

Site Summary by Program

Program(s)	Active sites
Service Learning	25
Academic Internships	6

Newest Proposals

Name of Organization	Approval Status
ergsgsdfgsdfgsdf	Needs Review
test	Needs Review
Aces soccer club	Approved
TRACI is doing a full test!	Approved
testing this submission feb 12	Approved
sdfgsdfgsdfgsdfg	Needs Review
third test	Needs Review
testing second time	Needs Review
testing submissions	Needs Review
Hetchy Hospital	Needs Review

[View all \(11\) proposals](#)

When you

view the submission, you will see the option to create a new site from the submission. This will take you through the steps of creating a new site on S4.

You will be able to create a new Parent Site **and** a new Program Site, or select an existing Parent Site, and create a new Program site under that Parent Site.

- When you create a new site from the submission, the submission is automatically added to the new site in the log entry tab.
- You can download a pdf of the submission.
- You can have a copy of the submission automatically emailed to the submitter.
- You can be notified by email when new submissions come in.

End of Placement Forms in S4

End-of-service forms may be created and added to a student's placement record, at some point **after** they have already signed up. This is handy for a mid-term evaluation, end of term evaluation, or

Hetch Hetchy Proposal Form [Template]

[View](#)

[Download PDF](#)

[Create Site from this Submission](#)

Approval Status Needs Review

Name of Partnership Hetchy Hospital

Main Contact First Name Carpel

Main Contact Last Name Tunnel

Main Contact Job Title Advisor

Main Contact Email Address carp@hetchhospital.org

Main Contact Phone 801-277-7174 ext.

Do you want to show Main Contact information to students? No

Are you the main contact for this site? Yes

Street Address 800 hetchy road

City Hetchy

State California

CSU The California State University

required upload of a student's time log, for example.

How to add an end-of-service form

First, create the form from your Forms Tab.

Make sure to select type end-of-service.

Go to Manage Program from the home page dashboard.

Select your program.

Toggle **enable** button.

If Form is enabled, it will show up when student logs in.

[Back to top](#)

Service Learning

View Edit Revision operations

Address Campus CSU Hetch Hetchy

Forms

Download Forms

Learning Plan Agreement	Signup	Delete	Required for placement
Service Learning Time Log	Signup	Delete	

Signup Forms

3. Emergency Contact Information	Edit	Submissions (3)	Make required for placement
Learning Plan and Participation Guidelines	Edit		Required for placement
Release of Liability	Edit	Submissions (5)	Required for placement

End of Service Forms

End of Service Form	Edit	Submissions (4)	Disable
Time Log	Edit	Submissions (0)	Enable

This user guide was created by CalState S4 support staff. If you have any additional questions or feedback, please contact CalState S4 at support@calstates4.freshdesk.com.

If you have questions specific to your campus' instance of CalState S4, please contact your campus keymaster.