

Form Tips & Help

Student Success
Staff Support
Site Safety
Smart Statistics



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You may wish to use the Webform features of Cal State S4. This can be helpful, as you can require students to complete forms during the process of signing up for their placement.

Webforms can be seen by staff in the **Forms tab** of their toolbar. Students and faculty do not have direct access to the Forms tab in their toolbar (*Why?* webforms are designed to be included in part of the sign-up or other process, not selected from a menu).

This guide will help walk you through the creation of a new webform.

CalState S4

A project of the CSU Center for Community Engagement
www.calstates4.com | app.calstates4.com





Forms				
Create new form				
Service Learning				
Form Name	Form category			
Emergency Contact Information	Signup	Edit	Edit fields	Submissions (1)
Evaluation Form	Evaluation	Edit	Edit fields	Submissions (0)
General Liability Waiver	Other	Edit	Edit fields	Submissions (1)
Release of Liability, Service Learning	Signup	Edit	Edit fields	Submissions (2)
Academic Internships				
Form Name	Form category			
Release of Liability - Academic Internships	Signup	Edit	Edit fields	Submissions (0)
Proposal Forms				
Community Partner Proposal Form		Edit	Edit fields	Submissions (3)

Create a Webform

1. From the Forms menu in the toolbar select **Create new form**.
2. Give the webform a **Title**.
3. Select the **Program** that this form is affiliated with.
4. Select **Form category**. *Sign-up* forms will appear upon signup. *Other* forms will be attached to a user's profile. *End-of-service* forms are enabled at a manually specified date.
5. **Conditional Options**
 A *Sign-up* form can be required for placement or optional for placement
 An *Other* form can optionally show up on every placement record of a student.
6. **Save**.



Create Program Form

Title Required

Program Required Service Learning

Form category Required Signup

This form is required for placement

Enabled
Check this box if you want this form to be available for students to fill out.

Archive this form
This moves the form to a different list so you can retain old forms without them cluttering the main form list.

Campus (*Access control enabled for: view, update, delete*)
CSU Hetch Hetchy

Enabling and Disabling your webform

Sign-up forms and End-of-service forms can be enabled and disabled. When creating the form, you can keep it disabled, so that students don't see it and get confused.

Once you enable it, students will see the form as a part of their sign-up process and/or placement record. If you disable it after a student has already placed, their submission will still show up as part of their placement.

"Other" forms are always enabled, because they are not associated with a single placement.

View and edit your webform

Now you have created the initial form, but your new form has no components in it yet, and nothing for users to fill out.



HOME SITES USERS COURSES OPPORTUNITIES FORMS REPORTS LOGOUT

Home » Forms » Test form

Test form

View Edit Edit form

Student goals

Please write out at least three goals that you hope to achieve in the process of this service learning experience

Submit

Select the tab **Edit form** to add questions, instructions, drop down menus, and more.

At any point you can view the progress of your form by selecting the view tab at the top. Then you can go back to editing the form components in the Edit form tab.

Test Form

View Edit Edit form Results

Edit questions Conditionals E-mails Export Form settings

Show row weights

Label	Form Key	Type	Value	Required	Operations
+		Single-line text		<input type="checkbox"/>	Add
New component name					

Save

Add components to your form

You will add **components** to create the content of your webform. There are several different components to choose from. You can add as many components as you like, in whatever order you like. To see what the



different types of components do, see the [webform components](#) section below.

To add components:

1. Give your component a **Label**. This may or may not show up in the webform, depending on the component, and your choice of settings.
2. Select the **type** of component you are adding. [See below](#) for an explanation of the different components.
3. Select **mandatory** if this field is required to be filled out by the student in order for the form to be complete (a signature line, for example)
4. Add the component. You will then be directed to *edit the details of the component* you are adding.

Edit form components

While you will see some variety in component details depending on the component you are creating, there are standard things in all webform components familiar with:

The Label will have been established on the previous screen, and the short-term computer name is generated from the label

Default value - this is where you can insert “tokens” of information that we already in S4 into a webform. More on that later.

Description - generally this shows up as smaller text *under* the submission field.

Required - means that it is mandatory that person fill out this field.

Show the question text gives you the to show the label text, either above or inline the submission field, or not at all.

be

some to be

name.

have

the

option with



Other details of the component - If you don't make any changes in other format fields (such as length of the text area) the component's default setting will be used, which is usually sufficient.

Save. Once you hit save at the bottom, you will be directed back to editing the web form. You now have the ability to **edit, delete, or clone** this component.

Webform Components

For more detailed information, see the [Webform Components help documentation](#).

Release of Liability, Service Learning

View
Edit
Log Entries
Edit form
Results

Edit questions
Conditionals
E-mails
Export
Form settings

[Show row weights](#)

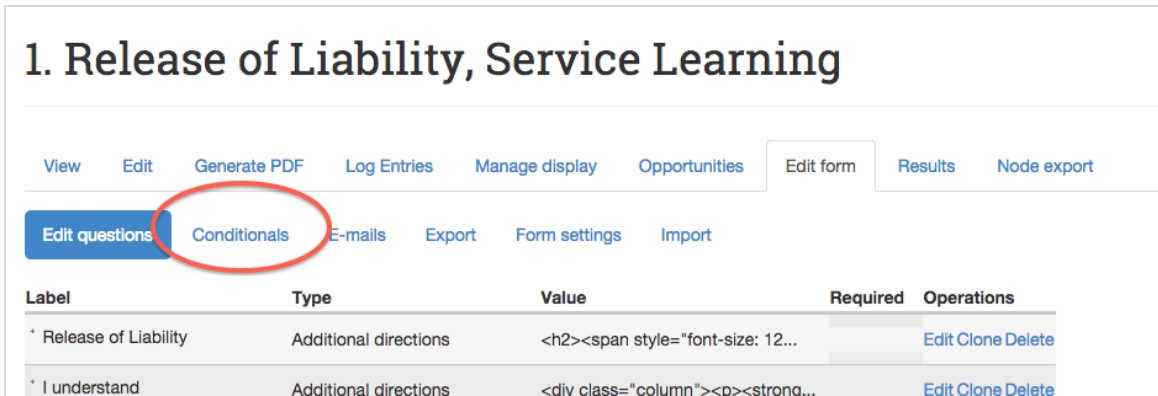
Label	Type	Value	Required	Operations
* Release of Liability	Additional directions	<h2>	<input type="checkbox"/>	Edit Clone Delete
* I understand	Additional directions	<div class="column"><p><strong...>	<input type="checkbox"/>	Edit Clone Delete
* Name of Participant	Single-line text	[current-user:field-user-first...	<input checked="" type="checkbox"/>	Edit Clone Delete
* Signature of Participant	Signature	-	<input checked="" type="checkbox"/>	Edit Clone Delete
* Confirmation of Age	Drop-down list	-	<input checked="" type="checkbox"/>	Edit Clone Delete
* Under 18 additional instructions	Additional directions	<h2>STOP!</h2...>	<input type="checkbox"/>	Edit Clone Delete
* Check Box to Agree:	Drop-down list	-	<input type="checkbox"/>	Edit Clone Delete
* Parent Signature text	Additional directions	<h2 style="margin: 0px 0px 10p...>	<input type="checkbox"/>	Edit Clone Delete
*	Single-line text		<input type="checkbox"/>	Add

Save



Conditionals, E-mails, and Form settings

There are a few other handy settings with webforms that you can consider using. You can see them as a tool bar within the “edit form” tab.



Label	Type	Value	Required	Operations
* Release of Liability	Additional directions	<h2><span style="font-size: 12...		Edit Clone Delete
* I understand	Additional directions	<div class="column"><p><strong...		Edit Clone Delete

Conditional Fields

The answer submitted in one field on your form can cause another field to behave differently, depending on the selection in the original field. Here is a good example in which a conditional field is used:

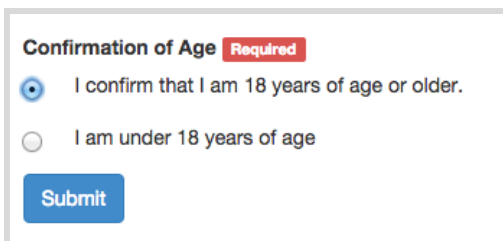
A student is asked “are you over 18?”

A drop-down menu allows the student to check **yes** or **no**.

If the student selects “**no**” then the condition triggers an additional field to be shown.

The additional field gives the students additional directions for minors.

Conditional on “I am under 18...”

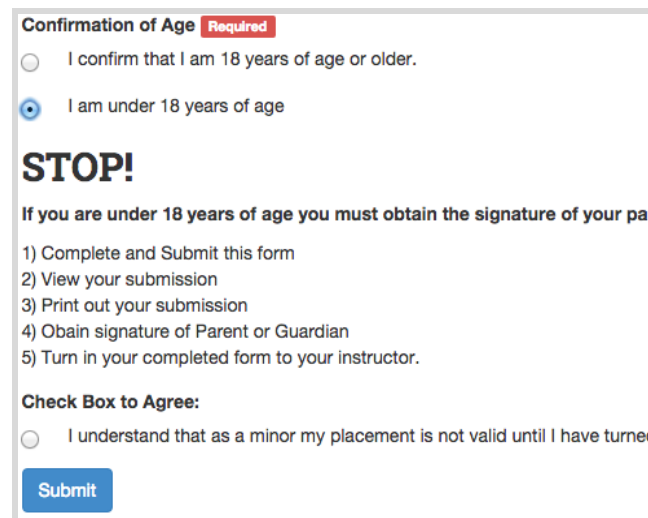


Confirmation of Age Required

I confirm that I am 18 years of age or older.

I am under 18 years of age

----->



Confirmation of Age Required

I confirm that I am 18 years of age or older.

I am under 18 years of age

STOP!

If you are under 18 years of age you must obtain the signature of your parent/guardian.

- 1) Complete and Submit this form
- 2) View your submission
- 3) Print out your submission
- 4) Obtain signature of Parent or Guardian
- 5) Turn in your completed form to your instructor.

Check Box to Agree:

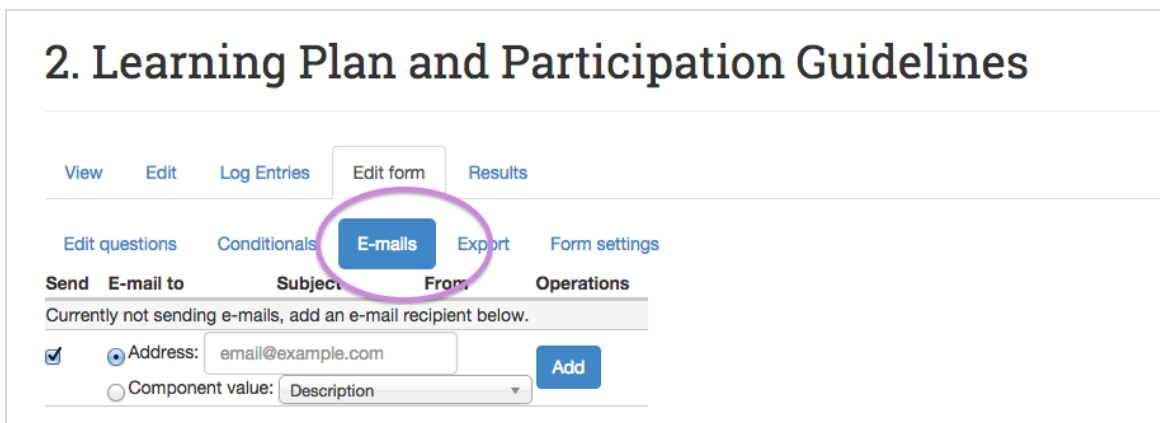
I understand that as a minor my placement is not valid until I have turned in my completed form to my instructor.

Set up conditionals by going to the toolbar “edit form,” sub-toolbar “conditionals.” You first need to have added the form components before you can add conditions onto those components.

Email Form Submissions

Within a form you can designate that the form’s submission(s) be sent to a particular email address, or an email address identified within the form itself. This is very helpful in a situation where you want a community partner or site supervisor to get a copy of a student’s placement forms. You can [check out this quick video tutorial](#) for more help with this process.

Set up emails by going to the toolbar “edit form,” sub-toolbar “E-mails.”



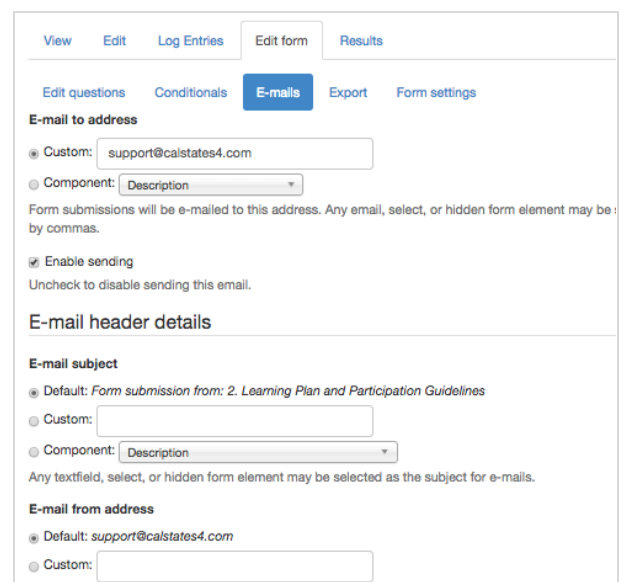
Send options

You can send submission notification emails to a specific email address, OR to an email address provided within the form submission itself:

1. To designate a specific email address that will be sent an email notification every time this form is submitted:

- Add the email address, and click **Add**.
- Go through the setup page (you can do things like have a custom subject line).
- Save**.

An example of using this feature as a helpful tool: A program creates an “other” form that is a faculty questionnaire, and program staff want to be alerted every time a new faculty has filled out the form.

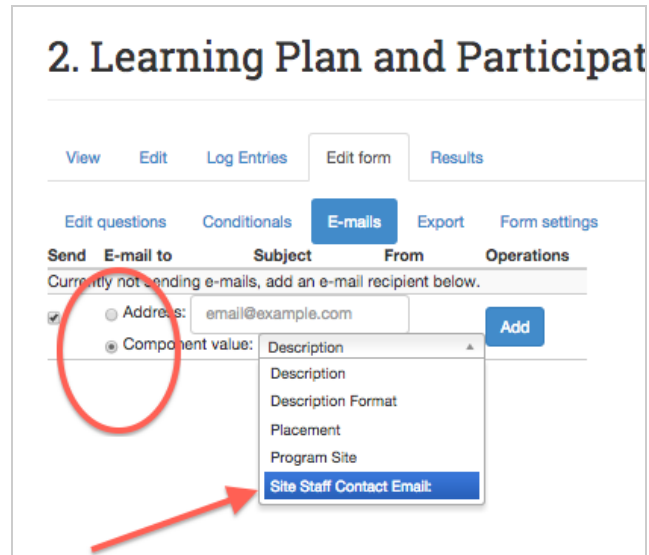


2. To send the form to an email address that has been captured during the form submission:

First you need to have created the email web component in the form, where the form submitter is asked to input a particular email address (like their site supervisor's email, for example) See the [webform components section](#) of this document for more information.

- From the email sub-tab, select **component value**.
- From the dropdown list, select the component in your form which will contain the email that the form submission will be sent to (site supervisor, for example).
- Click **Add**. Go through the setup page (you can do things like have a custom subject line, or send only certain parts of the form in the email).
- Click **Save**.

Helpful tip: Test your setup to make sure it works by submitting a test form, and using an email in the test form that you have access to.

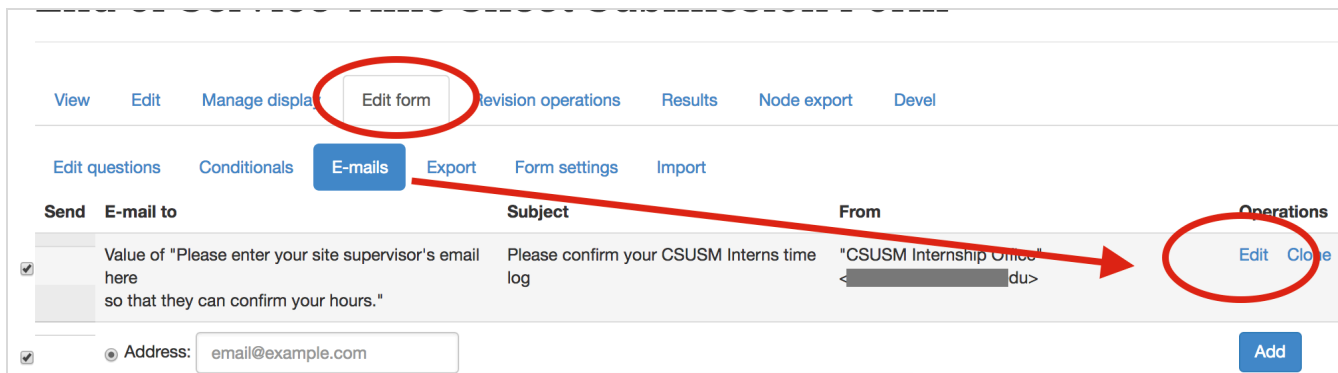


Fields to include in the e-mail

You do not have to include every field collected in the form in the email that you send out. You can pick which fields will be included in the email. How to do this:

Go to the email settings

Go to Form → Edit form → subtab E-mails → edit specific email → on very bottom go to “Included values”
Click only the values that you want included in the body of the email you are sending.





Include files as attachments

▾ [Included e-mail values](#)

The selected components will be included in the [submission:values] token

Student Name:

Total actual hours served:

Student upload of timesheet:

Additional Pages

Please enter your site supervisor's email here, so that they can confirm

Faculty email:

Exclude empty components

[Save e-mail settings](#)

Use of Tokens to Auto-populate form fields

Placement tokens are handy tokens that can auto-populate forms fields, so that the student does not need to enter information. The token should be entered - with the []s - in the “default value” content area when creating the form field. These should be added to text fields.

Edit component: Course Details (Title, subject, number, and section)

[View](#) [Edit](#) [Manage display](#) [Edit form](#) [Revision operations](#) [Results](#) [Node export](#)

[Edit questions](#) [Conditionals](#) [E-mails](#) [Export](#) [Form settings](#) [Import](#)

Label Required

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

Short computer name Required

Enter a computer-readable version of this question. This can only contain letters, numbers, and underscores ()

Default value

The default value of the field. [Browse available tokens.](#)

[Click here for list of placement and a common tokens](#)



This user guide was created by Cal State S4 support staff. If you have any additional questions or feedback, please contact the HelpDesk.

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