Form Tips & Help

Student Success
Staff Support
Site Safety
Smart Statistics

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- Add components to your form
- Edit form components

Common Webform Components

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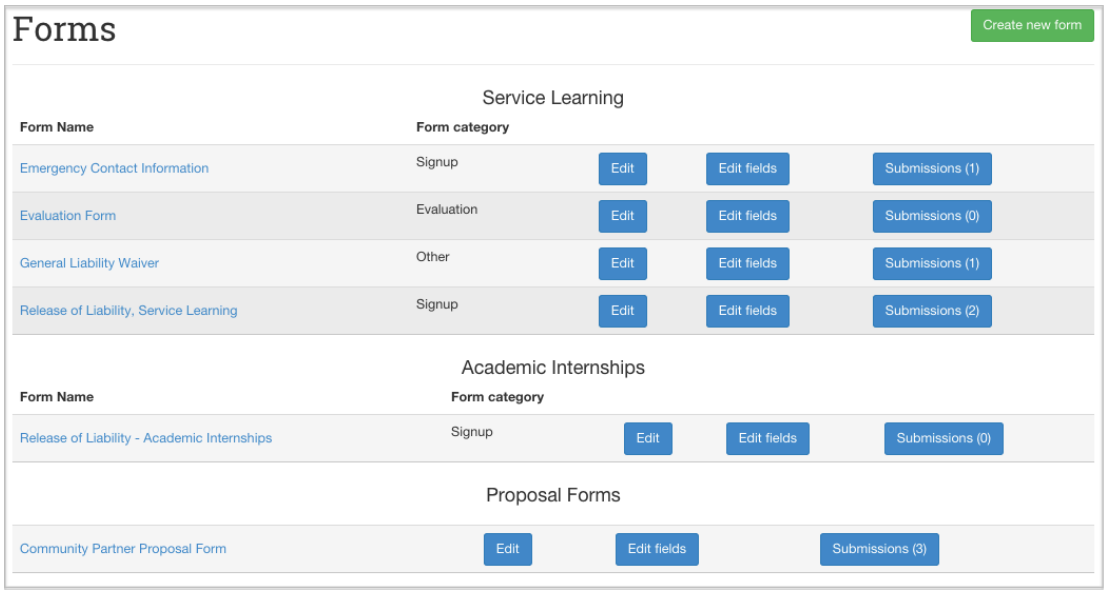
Use of Tokens to Auto-populate form fields

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.



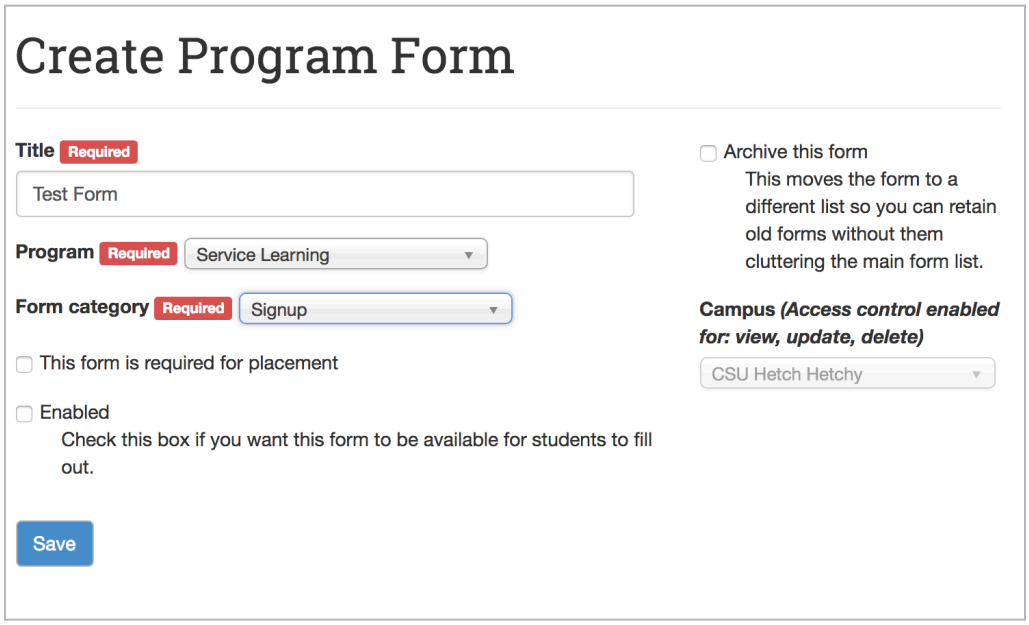
Create a Webform

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**.

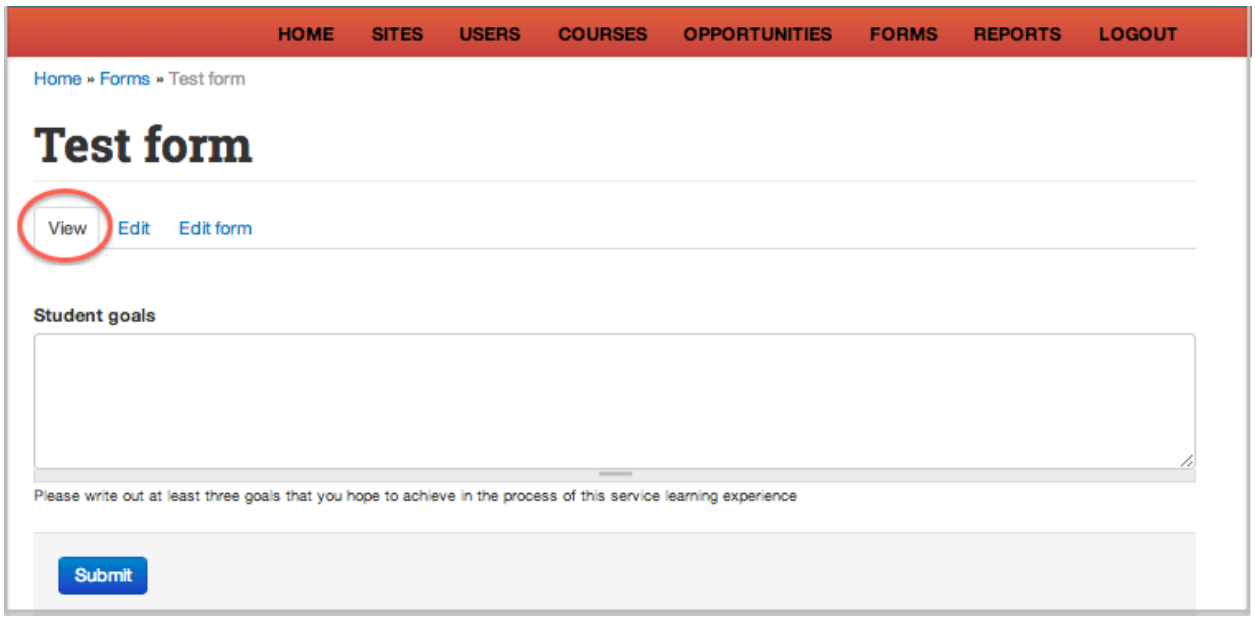


Enabling and Disabling your webform

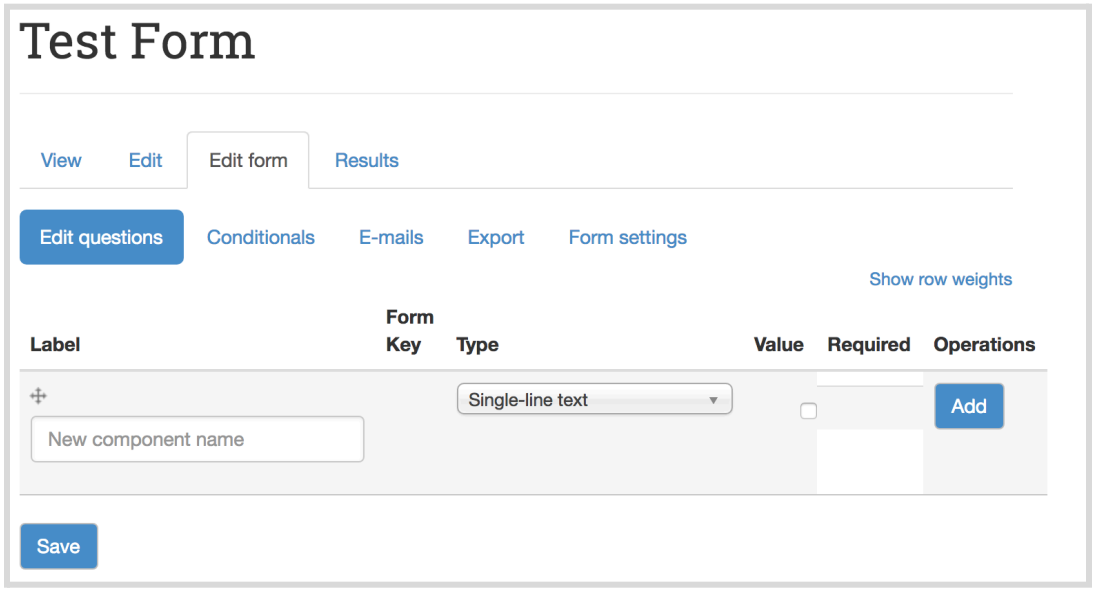
Sign-up forms and End-of-service forms can be enabled and disabled. When creating the form, you can keep it disabled, so that students don't see it and get confused.
Once you enable it, students will see the form as a part of their sign-up process and/or placement record.
If you disable it after a student 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.



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.



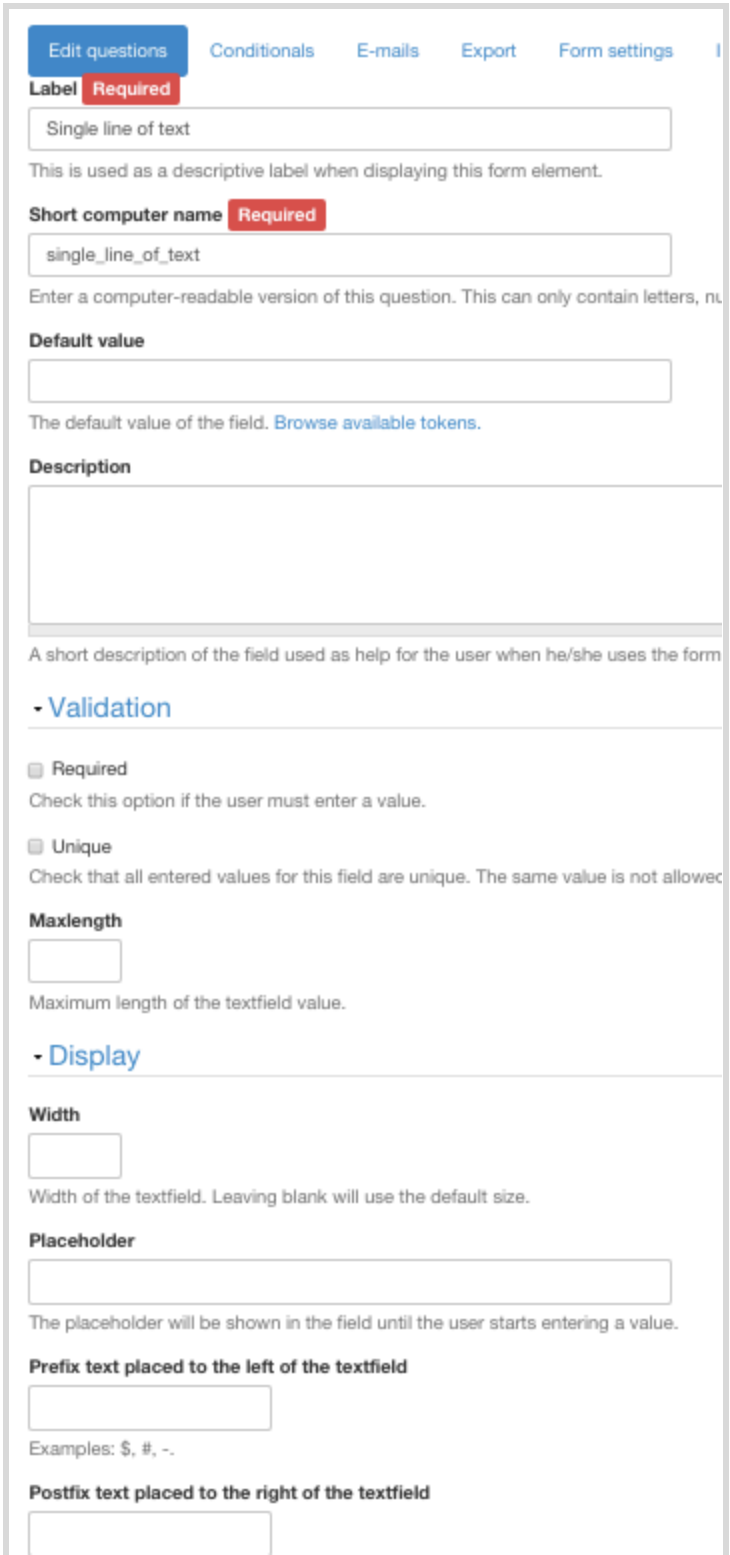
Add components to your form

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 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 some standard things in all webform components to be familiar with:

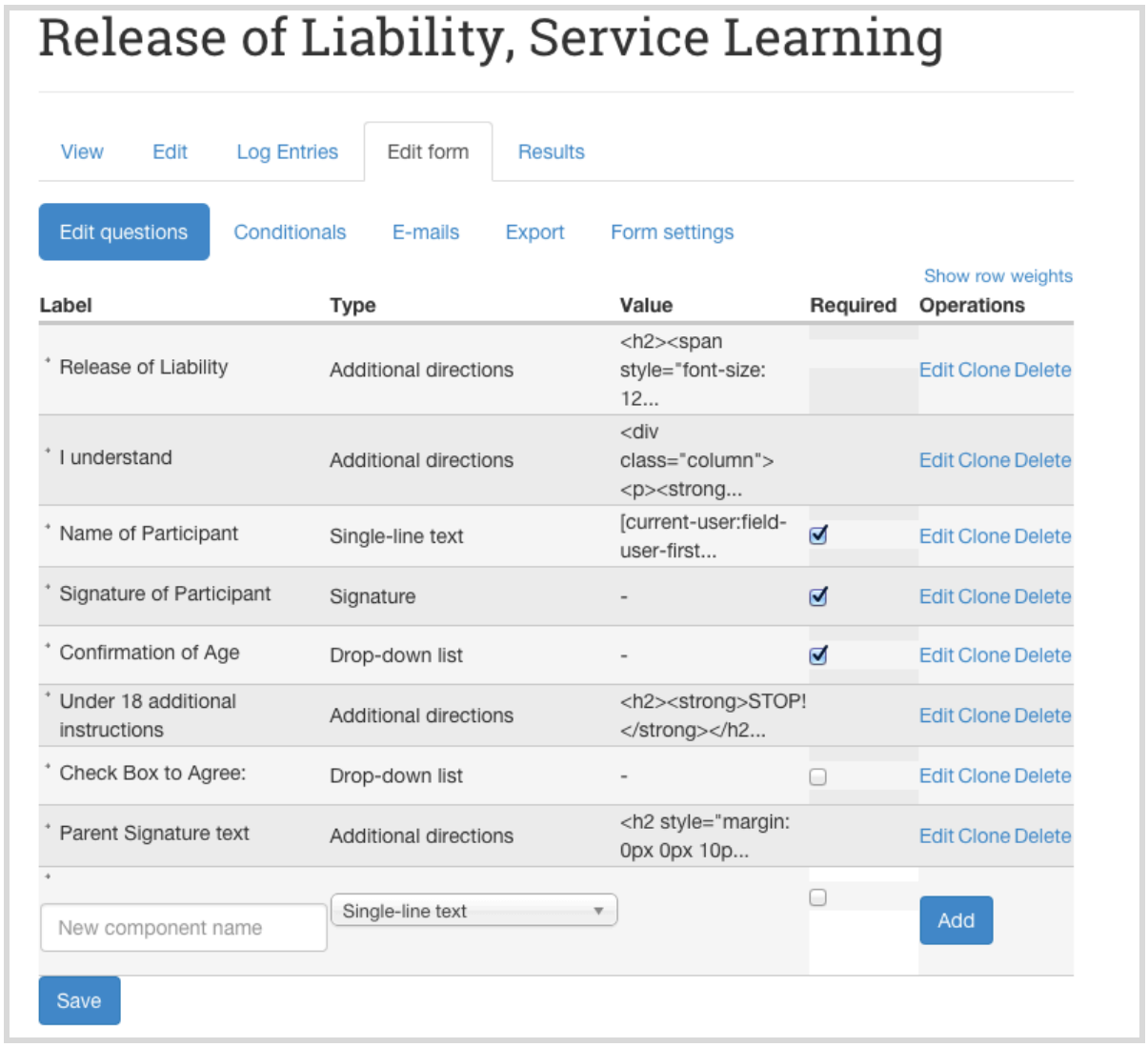
The Label will have been established on the previous screen, and the short-term computer name is generated from the label name.
Default value - this is where you can insert "tokens" of information that we already have in S4 *into* a webform. More on that later.
Description - generally this shows up as 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 option to show the label text, either above or inline with the submission field, or not at all.

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.

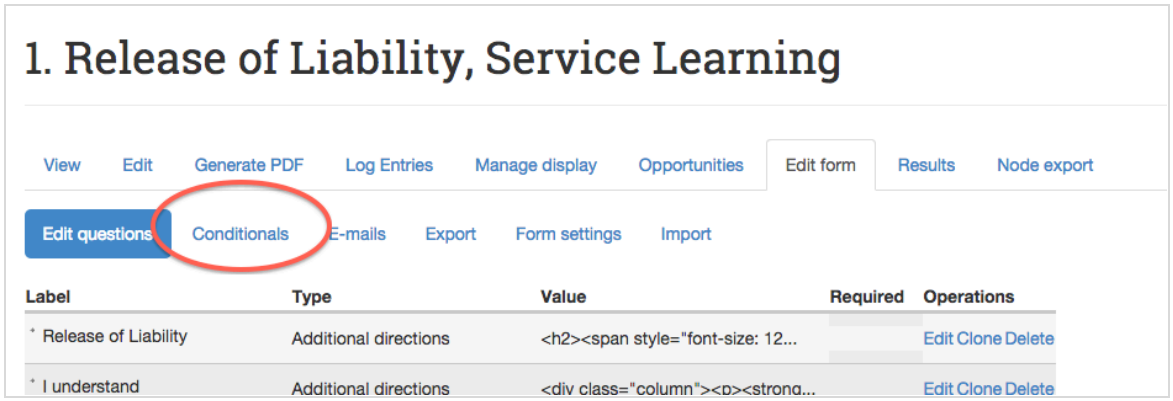
Webform Components

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



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.

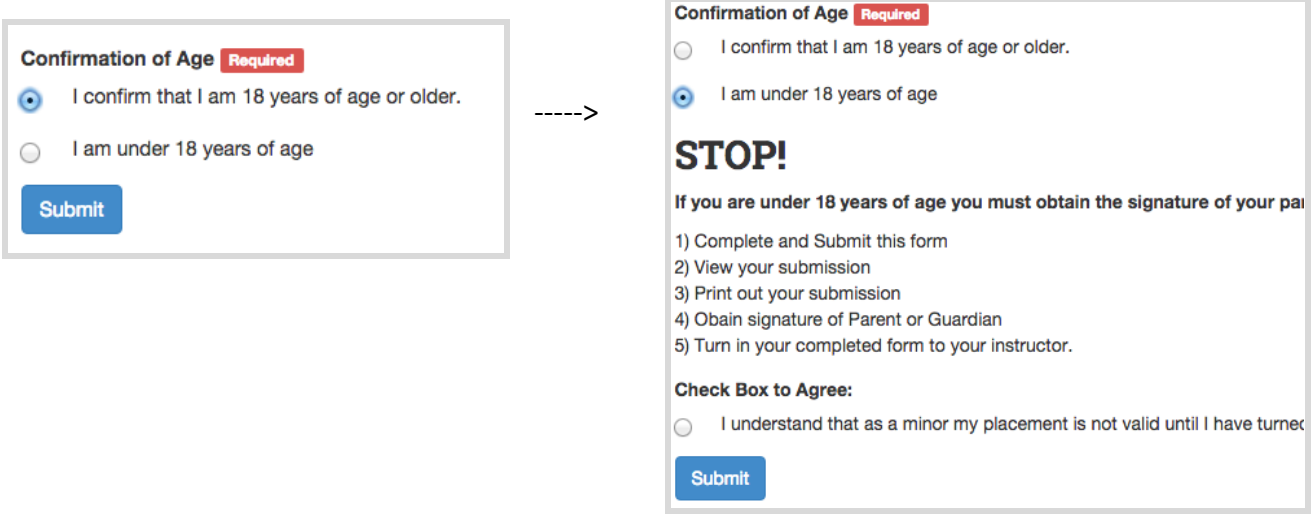


Conditional Fields

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 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...”

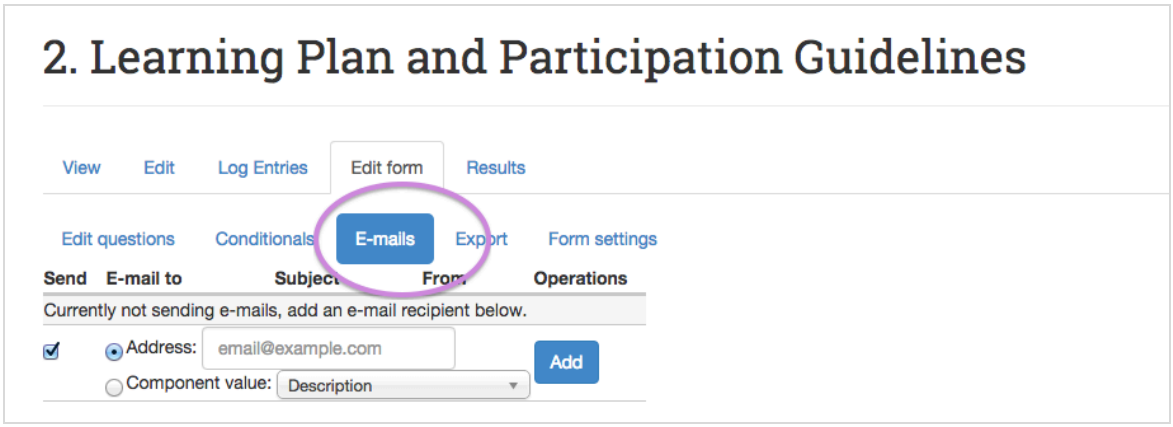


Set up conditionals by going to the toolbar “edit form,” sub-toolbar “conditionals.” You first need to have added the form components before you can add conditions onto those components.

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.”

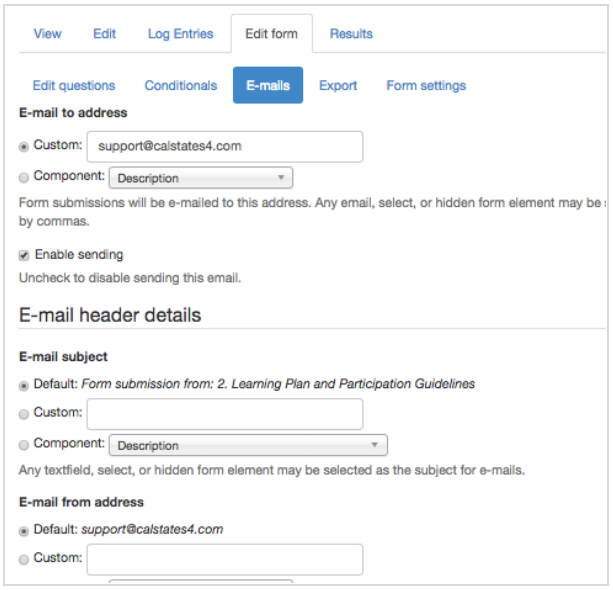


Send options

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:

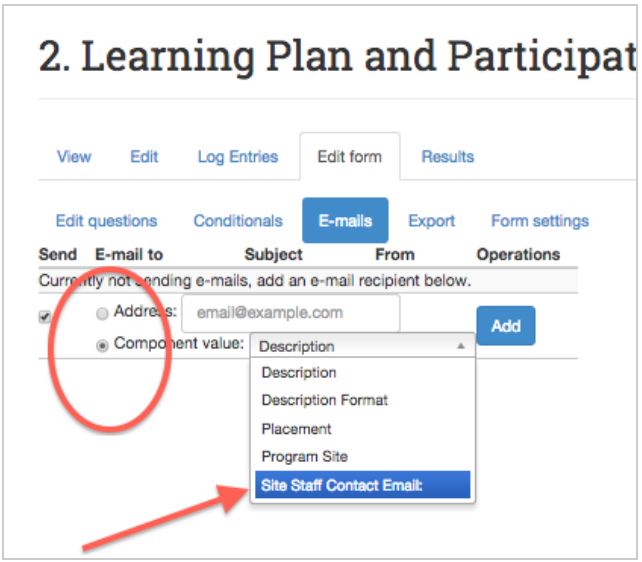
-Add the email address, and click **Add**.
-Go through the setup page (you can do things like have a custom subject line).
-**Save**.



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.

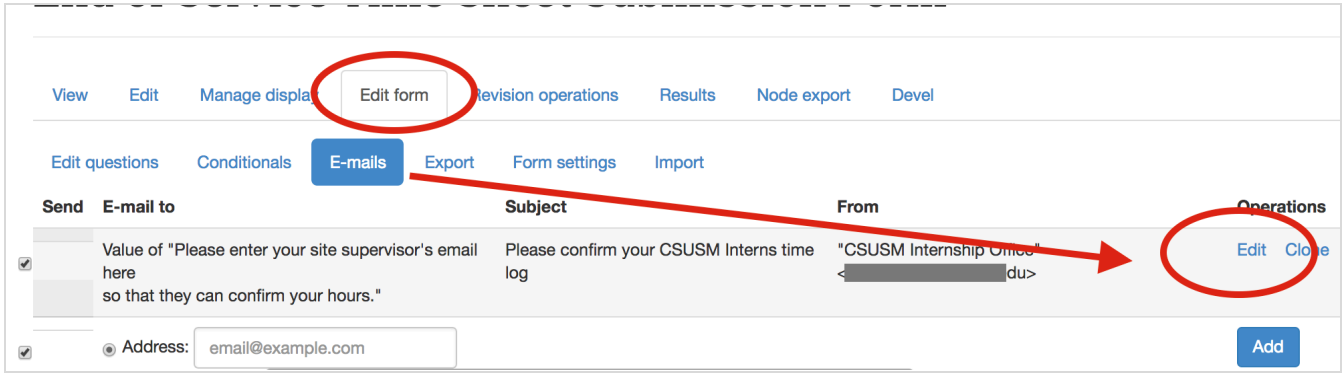


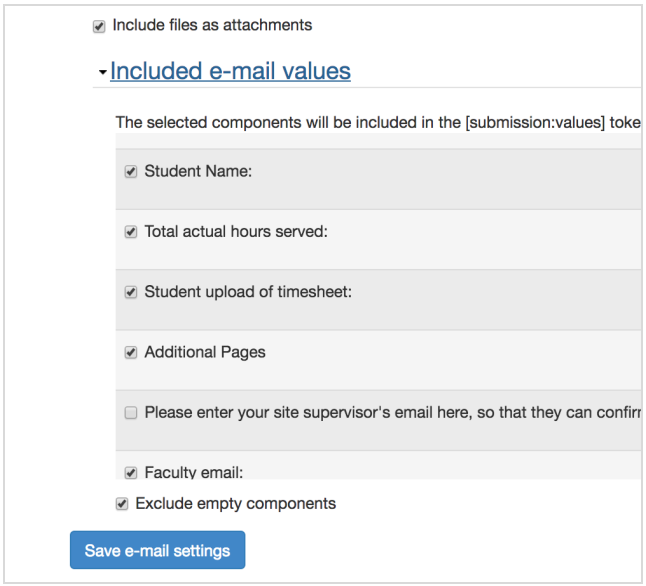
-From the email sub-tab, select **component value**.
-From the dropdown list, select the component in your form which will contain the email that the form submission will be sent to (site supervisor, for example).
-Click **Add.** Go through the setup page (you can do things like have a custom subject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

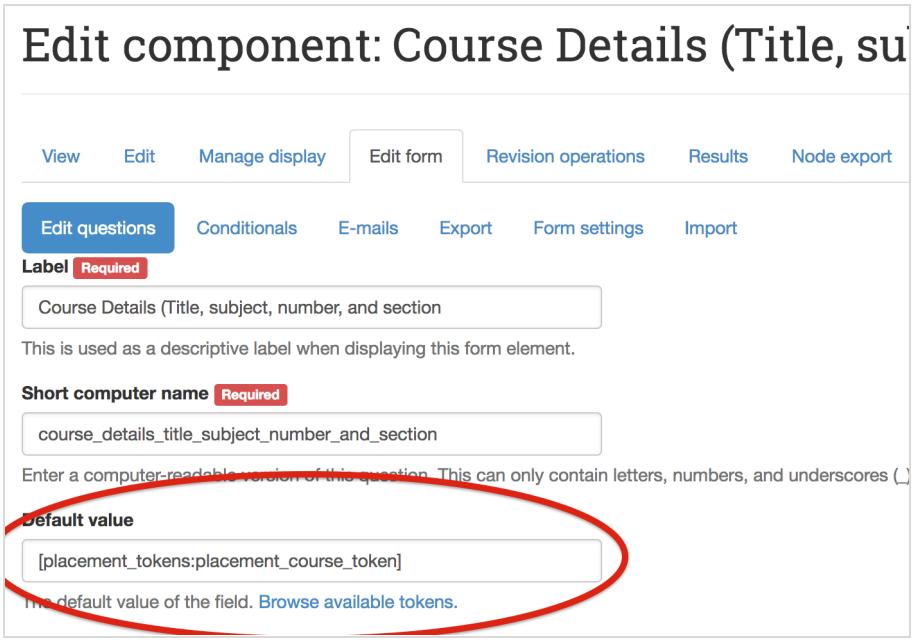
You do not have to include every field collected in the form in the email that you send out. You can pick which fields will be included in the email. How to do this:
Go to the email settings
Go to Form → Edit form → subtab E-mails → edit specific email → on very bottom go to "Included values"
Click only the values that you want included in the body of the email you are sending.





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.



[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.