

SEATTLEU

TerminalFour Training
Form Managers

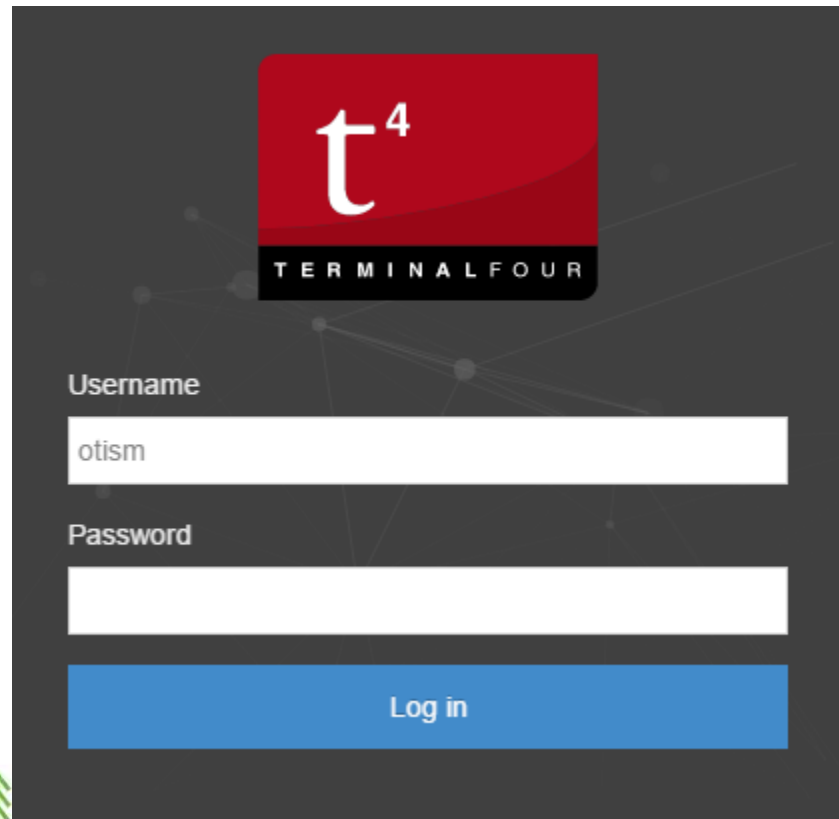
Today's agenda

- Create a new form
- Edit an existing form
- View and download form submissions



Signing In

- cms.seattleu.edu/terminalfour/



The image shows a login interface for Terminal Four. At the top is a red square with a white 't' and a superscript '4', with the text 'TERMINALFOUR' in white on a black background below it. Below the logo are two white input fields: the first is labeled 'Username' and contains the text 'otism'; the second is labeled 'Password' and is empty. At the bottom of the form is a blue button with the text 'Log in' in white. The background of the form is dark grey with a faint network diagram.



Site Manager: Quick Tour

The screenshot displays the TerminalFour Site Manager interface. The top navigation bar includes the TerminalFour logo, a 'Sites & Channels' icon (highlighted with a red box and arrow), a search bar, and a user profile for Megan. The left sidebar lists various management categories: Content, Sites & Channels, Assets, Measure, Engage, and System administration. The main content area shows the 'Site structure' view, which is a tree diagram of the website's hierarchy. The 'Seattle University' site is expanded, showing sub-sites like 'Curated Events', 'Slideshow Slides', 'Campus Alert', 'Section Customizations', '125th Anniversary', 'About Seattle University', and 'Academic Affairs'. Each sub-site has associated counts in green, orange, and red circles, and an 'Actions' button.

Site Name	Green Count	Orange Count	Red Count	Actions
Home	0	0	0	Actions
Seattle University	16	0	3	Actions
Curated Events	95	2	5	Actions
Slideshow Slides	5	1	8	Actions
Campus Alert	0	0	2	Actions
Section Customizations	2	0	0	Actions
125th Anniversary	7	0	2	Actions
About Seattle University	4	2	1	Actions
Academic Affairs	3	0	0	Actions

Site Manager: Quick Tour

TERMINALFOUR

Content Sites & Channels Assets Measure Engage System administration

Home

Search ...

MO Welcome Megan

Site structure » Navigate through sites and ...

Bookmarks

Site structure

Item	Green	Yellow	Red	Actions
Home	0	0	0	Actions
Seattle University	16	0	3	Actions
Curated Events	95	2	5	Actions
Slideshow Slides	5	1	8	Actions
Campus Alert	0	0	2	Actions
Section Customizations	2	0	0	Actions
125th Anniversary	7	0	2	Actions
About Seattle University	4	2	1	Actions
Academic Affairs	3	0	0	Actions

Site Manager: Quick Tour

The screenshot displays the TerminalFour Site Manager interface. The top navigation bar includes the TerminalFour logo, user profile icons, and a welcome message for Megan. The left sidebar menu is highlighted with a red box and contains the following items: Content, Sites & Channels, Assets, Measure, Engage, and System administration. A red arrow points from the 'Dashboard' label below to the 'Engage' menu item. The main content area shows the 'Site structure' page, which lists various site components and their associated metrics.

Site Structure	Green	Yellow	Red	Actions
Home	0	0	0	Actions
Seattle University	16	0	3	Actions
Curated Events	95	2	5	Actions
Slideshow Slides	5	1	8	Actions
Campus Alert	0	0	2	Actions
Section Customizations	2	0	0	Actions
125th Anniversary	7	0	2	Actions
About Seattle University	4	2	1	Actions
Academic Affairs	3	0	0	Actions

Dashboard

Prerequisites

- To access the Forms Tool, you need:
 - A TerminalFour “Power User” account
 - Added to “Form Manager” permissions group
- Contact otism@seattleu.edu if you need access



Create a new form

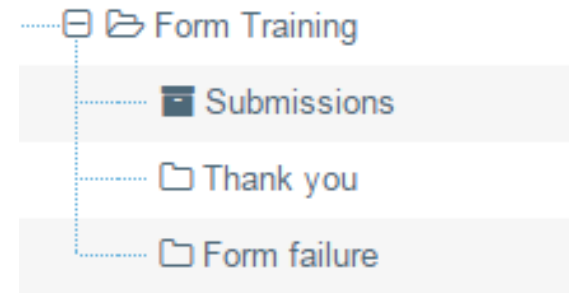
Three stages:

- Create folder structure to house and support your form (site structure)
- Create form in Form Builder tool (Dashboard)
- Deploy form in the section (site structure)



Folder structure to support forms

- Identify or create a section (or page) where you want the form to be published
- Then create three subsections:
 - “Submissions” folder
 - “Thank you”
 - “Form failure”



Create submissions folder

- Create a new section
 - Name this section **Submissions**
 - Uncheck 'Show in navigation'
 - Check 'Archive section'
- Each form submission will be added to this folder as a new content item

Name *	Submissions
Status	Approved
Section options	<input type="checkbox"/> Mark as link section
	<input type="checkbox"/> Show in navigation
	<input checked="" type="checkbox"/> Archive section
	<input type="checkbox"/> eForm section



“Thank you” section

- Create a new section named “Thank you” or “Success”
 - Uncheck “show in navigation”
- Create a content item, add a message to users
 - Users will be redirected to this page after a successful form submission



“Form failure” section

- Create a new section named “Form Failure”
 - Uncheck “show in navigation”
- Create a content item, add a message to users
 - Users will be redirected to this page after an unsuccessful form submission



Accessing Form Tool

The screenshot shows the TERMINALFOUR dashboard interface. The top navigation bar includes the logo 'TERMINALFOUR', user profile 'Welcome Megan', and a search bar. The left sidebar contains a menu with categories: Content, Sites & Channels, Assets, Measure, Engage, Email campaigns, Push to social, Forms & transactions, Personalisation, and System administration. The 'Engage' menu item is circled in red, with a red arrow pointing to it and the text 'Engage menu'. The 'Forms & transactions' menu item is also circled in red, with a red arrow pointing to it and the text 'Forms & transactions'. The main content area displays the 'Site structure' for Seattle University, listing various content types and their counts.

Site structure	0	0	0	Actions
Seattle University	16	0	3	Actions
Curated Events	95	2	5	Actions
Slideshow Slides	5	1	8	Actions
Canvas LMS	0	0	2	Actions
Section Customizations	2	0	0	Actions
125th Anniversary	7	0	2	Actions
About Seattle University	4	2	1	Actions
Academic Affairs	3	0	0	Actions



Accessing Form Tool

Forms » create and manage forms to collect and distribute data




The TERMINALFOUR Form Builder allows you to create simple and complex web forms that you can publish as content within your sites pages. Existing forms that have already been created will be shown in the table below. To start creating a new form and adding elements to it, use the 'Create new form' button.

+ Create new form

- Wait for list of existing forms to populate

Existing forms

Display records Filter:

Form ▲	Last modified ▲	Usage ▲
 No results found		

Showing 0 to 0 of 0 entries



Create a new form or Find an existing Form

Forms » create and manage forms to collect and distribute data

The TERMINALFOUR Form Builder allows you to create simple and complex web forms that you can publish as content within your sites pages. Existing forms that have already been created will be shown in the table below. To start creating a new form and adding elements to it, use the 'Create new form' button.

Existing forms

Display records

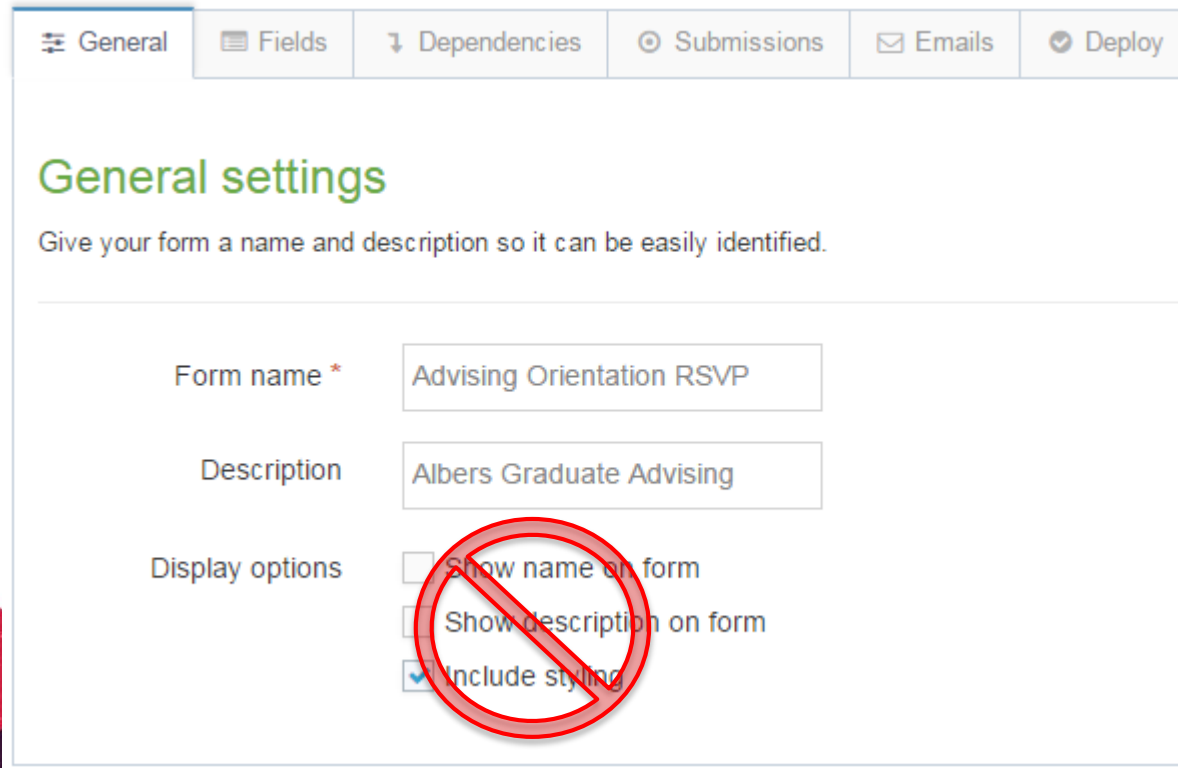
Filter:

Form	Last modified	Usage	
Accounting Mentor Form Albers Placement Center - Mentor Program id: 34	04 January 2017 5:00 PM	1 use	Actions
Advising Orientation RSVP Albers Graduate Advising id: 33	23 May 2017 10:32 AM	1 use	Actions
Albers Career Night - Professionals Albers Placement Center Event id: 397	04 January 2017 5:16 PM	1 use	Actions
Albers Career Night - Students Albers Placement Center Event id: 396	04 January 2017 5:13 PM	10 uses	Actions
Albers Mentor Program 25th Anniversary Celebration Albers Placement Center id: 57	01 April 2016 2:29 PM	1 use	Actions

- Green 'Create new form' or
- Use Filter to search for existing form
- Actions: Edit, Delete

Create/Edit a Form: General

- General Tab
 - Add/edit form name and description
 - Do not check any “display options”



General Fields Dependencies Submissions Emails Deploy

General settings

Give your form a name and description so it can be easily identified.

Form name *

Description

Display options

- Show name on form
- Show description on form
- Include styling

Caveat about form questions

- T4 forms should NOT:
 - Take personal data or high-risk confidential information (per SU Data Privacy Policy)
 - Social security number
 - Credit card numbers
 - Health and medical information



Create/Edit a Form: Fields

- Left column to add new fields or static elements to form
- Right column shows “Form preview”
 - Also edit and move existing fields (drag & drop)

The screenshot displays the SeattleU form builder interface. On the left, the 'Field options' sidebar contains a 'Toggle sidebar options' button, a 'Field options' section with instructions and a 'Configure field mappings' button, and three categories of fields: 'Standard input fields' (Text input, Email input, Dropdown, Checkbox, Radio group, Date, Date range, Text area, WYSIWYG, File, Hidden), 'Advanced inputs' (CC info), and 'Static elements' (H Heading, Paragraph, Line break). On the right, the 'Form preview' shows an 'Example form' with several fields: a paragraph of text, a 'Your Name' text input, a 'Your Email' text input, a 'Your Position' dropdown menu, a multiple choice question with three radio options, a 'What topics are you interested in?' checkbox question, and a 'What day/time would you like to meet?' date/time picker. Each field in the preview has an 'Edit' link.

Create/edit a Form: Fields

- Static elements:
 - Heading
 - Try not to repeat the page heading
 - Paragraph
 - This must be SHORT.
 - If you need more space for explanation – add text to the “form preamble” field in the Form content item
 - Line break
 - Faint grey horizontal line – useful to group questions



Create/edit a Form: Fields

- Label, tooltip text, placeholder text
- Validation
- Text input

This screenshot shows the configuration interface for a 'Your Name' form field. At the top, there is a preview of the form field with the label 'Your Name *' and a placeholder text 'e.g. John Doe (This is placeholder text.)'. Below the preview are three tabs: 'General', 'Advanced', and 'Validation'. The 'General' tab is active, showing the following settings:

- Label ***: Your Name (with a 'Hide' checkbox)
- Required field**:
- Tooltip text**: Your Name (this is the Tooltip text)
- Placeholder text**: e.g. John Doe (This is placeholder text.)

At the bottom, there are 'Delete' and 'OK' buttons.

- Email input

This screenshot shows the configuration interface for a 'Your Email' form field. At the top, there is a preview of the form field with the label 'Your Email *' and a placeholder text 'e.g. username@seattleu.edu'. Below the preview are two tabs: 'General' and 'Advanced'. The 'General' tab is active, showing the following settings:

- Label ***: Your Email (with a 'Hide' checkbox)
- Required field**:
- Tooltip text**: Your Email
- Placeholder text**: e.g. username@seattleu.edu

Below the 'General' tab settings, there are 'Confirmation email settings':

- Allow a user to receive a copy of their submission**:
- Email subject ***: Confirmation of your form submission

A red arrow points to the 'Allow a user to receive a copy of their submission' checkbox with the text 'Pro-tip!'. At the bottom, there are 'Delete' and 'OK' buttons.



Create/edit a Form: Fields

- Multiple choice – “pick one”
 - Dropdown
 - Radio group
- Multiple choice – “check all that apply”
 - Checkbox

The screenshot shows a form configuration interface with three tabs: General, Advanced, and Validation. The General settings section includes a Label field with a 'Hide' checkbox, a text input containing 'Here is a multiple choice question. Pick on', and a 'Required field' checkbox which is checked. Below this is a 'Tooltip text' field with the same text. The Field options section has a heading 'Specify options available for this field' and two radio buttons: 'from existing list' (unselected) and 'manually' (selected). A table below lists three options, each with a text input for the option text, a text input for the option value, a radio button for selection, and a red 'Remove' button. A green '+ Add option' button is located at the top right and bottom right of the table area. At the bottom of the interface are a red 'Delete' button and a blue 'OK' button.

Option text	Option value	Selected	
Option 1	value 1	<input type="radio"/>	<input type="button" value="Remove"/>
Option 2	value 2	<input type="radio"/>	<input type="button" value="Remove"/>
Option 3	value 3	<input type="radio"/>	<input type="button" value="Remove"/>

Create/edit a Form: Fields

- Date
 - Gives users a calendar to pick a specific date
- Date range
 - Currently buggy, use two date fields instead
- Text area
 - Allows users to write long response to question but in plain text only
- WYSIWYG
 - Allows users to write long response to question but in HTML text box (bold, italics, headings, links, etc.)



Create/edit a Form: Fields

- Add a file

Attach a file ✓ OK

No file chosen

General Advanced Validation

General settings

Label * Hide

Required field

File storage method

Add file to media library
 Upload file to file system

Attach a file ✓ OK

No file chosen

General Advanced Validation

Validation

Accepted file extensions

Allow any file
 Specify allowed file extensions

Max upload size

Default size (50000KB)
 Specify max upload size

Allowed file extensions

Specify a KB size up to a maximum of 50000KB

Create/edit a Form: Fields

- Add a file – File Storage Method
 - File will be attached to form submissions email
 - File will also be attached to form submission record in ‘Submissions’ folder



Create/edit a Form: Dependencies

- This feature is still being developed and may not work as expected



Create/edit a Form: Submissions

- Save submissions to → Specified section
 - Select the “Submissions” section you created for this form!

Save submissions to

- TERMINALFOUR only
- Named child section
- Specified section

Section *

Home > Seattle University > TerminalFour Training > Form Training > Submissions

Select section

Clear selection



Submission name mapping

- Select a form field (such as name) to become the name of the content item for each form submission

Your Name * [Edit](#)

e.g. John Doe (This is placeholder text.)

Your Email * [Edit](#)

e.g. username@seattleu.edu

[Edit](#)

Your Position (select one option from the drop down menu) *

Here is a multiple choice question. Pick one. * [Edit](#)

- Option 1
 Option 2
 Option 3

Set up submissions

Configure how the data people submit will be dealt with.

When the form has been filled out and submitted, how do you want to deal with the data? By default, any submissions are saved in a child section of the form's payment gateway.

- Save submissions to
- TERMINALFOUR only
 Named child section
 Specified section

Section * [Home > Seattle University > TerminalFour Training > Form Training > Submissions](#)

Select section

Clear selection

Submission name mapping

Your Name

Show entries Filter:

Name	Created	Email		
Rudy Redhawk en	Feb 24, 2017 3:16 PM	redhawk@seattleu.edu	Actions	<input type="checkbox"/>
Sally Smith en	Feb 24, 2017 3:15 PM	smithsa5@seattleu.edu	Actions	<input type="checkbox"/>
Jane Doe en	Feb 24, 2017 3:14 PM	doeja@seattleu.edu	Actions	<input type="checkbox"/>
John Doe en	Feb 24, 2017 3:11 PM	doej@seattleu.edu	Actions	<input type="checkbox"/>

Showing 1 to 4 of 4 entries Previous Next

Create/edit a Form: Submissions

- Where do you want users to be redirected on success and failure?
 - Select the “Thank you” and “Form Failure” sections you created for this form

Redirection options on success

Redirect location on submission success Section URL

Section *

Home > Seattle University > TerminalFour Training > Form Training > Thank you

Select section

Clear selection

Redirection options on failure

Redirect location on submission failure Section URL

Section *

Home > Seattle University > TerminalFour Training > Form Training > Form failure

Select section

Clear selection

Create/edit a Form: Emails

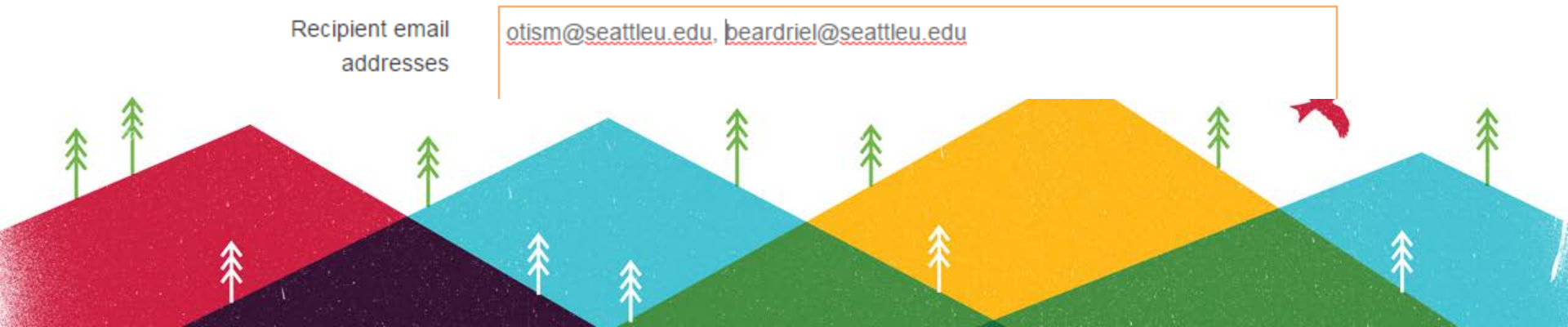
- Configure who gets emailed a copy of each form submission
 - System users and groups (checkboxes) – don't use!
 - Non-system recipients – type in email (multiple addresses should be separated by a comma)

Non-system recipients

Specify email addresses that should receive copies of each submission. Use this option if a user with the email address does not already exist within your system.

Recipient email
addresses

otism@seattleu.edu, beardriel@seattleu.edu



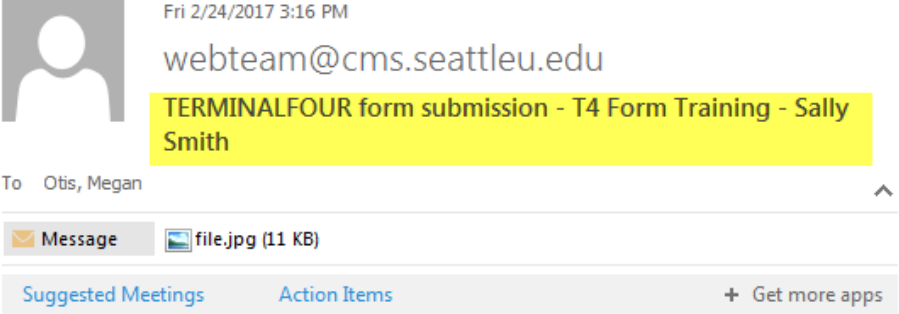
Create/edit a Form: Emails

- Subject field mapping
 - What form field (if any) should be included in the subject of the form submission email?

Additional options

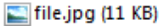
Subject field mapping

Your Name



Fri 2/24/2017 3:16 PM
webteam@cms.seattleu.edu
TERMINALFOUR form submission - T4 Form Training - Sally Smith

To Otis, Megan

Message 

Suggested Meetings Action Items + Get more apps

Hi

Below are the results of the submission of the form T4 Form Training via TERMINALFOUR.
If you feel you have received this in error [please contact your TERMINALFOUR Administrator](#).

Name: Sally Smith
Email: smithsa5@seattleu.edu
Position (select one option from the drop down menu): Staff
Here is a multiple choice question. Pick one.: Option 2
What topics are you interested in? (Check all that apply): Option 2
Pick a meeting day/time: 10 March 2017 9:00 AM
Comments: Comment comment comment
Attach a file: file.jpg
untitledField:



Create/edit a Form: Deploy

General Fields Dependencies Submissions Emails **Deploy**

Finished!
Your form has been created.

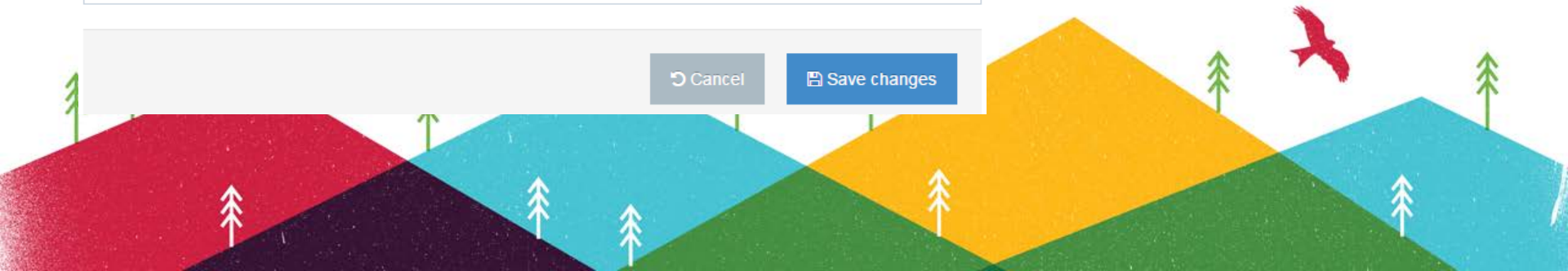
Your form has been created and is ready to be deployed.
Use the T4 tag below to insert this form into a item of content or a page layout.

Form T4 tag `<t4 type="form" name="T4 Form Training" id="565" />`

Copy to clipboard

Cancel Save changes

- Copy the Form's T4 tag (in the grey box)
- **BE SURE TO SAVE CHANGES!!**



Deploy form

- Add T4 tag form code to a “Form – Zone A” content type in the section (page) where you want the form to be published

Choose content type

Display records Filter:

Content type ^	Content description ⇅	Group ⇅	
Form - Zone A Displays a form made using Form Builder	Displays a form made using Form Builder	Form Managers	<input type="radio"/>

Showing 1 to 1 of 1 entries (filtered from 51 total entries) < 1 >

Content type : Form - Zone A

Name *

T4 tag *

View submission report: First access Form Tool

The screenshot displays the TERMINALFOUR user interface. The top navigation bar includes the logo 'TERMINALFOUR', user profile 'Welcome Megan', and a search bar. The left sidebar contains a menu with categories: Content, Sites & Channels, Assets, Measure, Engage, Email campaigns, Push to social, Forms & transactions, Personalisation, and System administration. The 'Engage' menu item is circled in red, with a red arrow pointing to the text 'Engage menu'. The 'Forms & transactions' menu item is highlighted with a red box, with a red arrow pointing to the text 'Forms & transactions'. The main content area shows a 'Site structure' view for 'Seattle University' with a tree view of site components and a table of statistics.

Component	Green	Yellow	Red	Actions
Seattle University	16	0	3	Actions
Curated Events	95	2	5	Actions
Slideshow Slides	5	1	8	Actions
Canvas	0	0	2	Actions
Section Customizations	2	0	0	Actions
125th Anniversary	7	0	2	Actions
About Seattle University	4	2	1	Actions
Academic Affairs	3	0	0	Actions



View submission report: First access Form Tool

Forms » create and manage forms to collect and distribute data



The TERMINALFOUR Form Builder allows you to create simple and complex web forms that you can publish as content within your sites pages. Existing forms that have already been created will be shown in the table below. To start creating a new form and adding elements to it, use the 'Create new form' button.

+ Create new form

Existing forms

Display records Filter:

Form	Last modified	Usage
 No results found		

Showing 0 to 0 of 0 entries

- Wait for list of existing forms to populate



View Submissions Report

Forms » create and manage forms to collect and distribute data

The TERMINALFOUR Form Builder allows you to create simple and complex web forms that you can publish as content within your sites pages. Existing forms that have already been created will be shown in the table below. To start creating a new form and adding elements to it, use the 'Create new form' button.

+ Create new form

Existing forms

Display 10 records Filter: albers

Form	Last modified	Usage	
Accounting Mentor Form Albers Placement Center - Mentor Program id: 34	04 January 2017 5:00 PM	1 use	Actions
Advising Orientation RSVP Albers Graduate Advising id: 335	23 May 2017 10:32 AM	1 use	Actions
Albers Career Night - Professionals Albers Placement Center Event id: 397	04 January 2017 5:16 PM	1 use	Actions
Albers Career Night - Students Albers Placement Center Event id: 396	04 January 2017 5:13 PM	10 uses	Actions
Albers Mentor Program 25th Anniversary Celebration Albers Placement Center id: 57	01 April 2016 2:29 PM	1 use	Actions

Actions

- Edit
- View submissions
- Delete

- Use Filter to search for form
- Actions: View submissions

View Submissions Report

- First, select a date range

Selected date range:

- View submissions and download as CSV file

Submissions

The table below shows all submissions for this form in the selected time period.

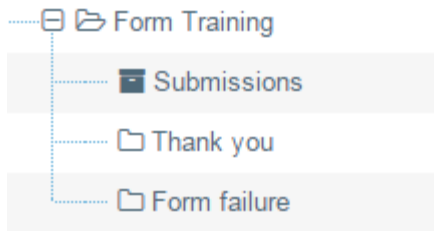
Show entries

Name		Created	Email		
Rudy Redhawk	en	Feb 24, 2017 3:16 PM	redhawk@seattleu.edu	Actions	<input type="checkbox"/>
Sally Smith	en	Feb 24, 2017 3:15 PM	smithsa5@seattleu.edu	Actions	<input type="checkbox"/>
Jane Doe	en	Feb 24, 2017 3:14 PM	doeja@seattleu.edu	Actions	<input type="checkbox"/>
John Doe	en	Feb 24, 2017 3:11 PM	doej@seattleu.edu	Actions	<input type="checkbox"/>

Showing 1 to 4 of 4 entries

View submissions in Site Structure

- Form submissions can also be viewed from the site structure – in your form’s submissions folder



Content in this section

Enable automatic ordering

Undo last action Undo all actions Bulk actions + Create content

Display 10 records Filter:

Order	Name	Version	Status	Last modified	Publish date		
+	Sally Smith	1.0	Approved	February 24, 2017 3:16 PM	N/A	Actions	↑
+	Jane Doe	1.0	Approved	February 24, 2017 3:16 PM	N/A	Actions	↑
+	John Doe	1.0	Approved	February 24, 2017 3:16 PM	N/A	Actions	↑
+	Rudy Redhawk	1.0	Approved	February 24, 2017 3:17 PM	N/A	Actions	↑

Showing 1 to 4 of 4 entries

< 1 >

Best practice: Don't rely on emails

- Check the submissions folder regularly and compare to list of form submission emails you've received



Any questions?

- **T4 Training Website:**
 - www.seattleu.edu/web/training
- Megan Otis, Web Support Specialist
 - otism@seattleu.edu
 - 206-296-6354
- OR web@seattleu.edu

