Form and Reports Training

1. The Form Builder Tool
    a. To make a form goto : http://www.gettysburg.edu/about/offices/ees/web_comm/web_liaisons/index.html
    b. There are five steps, four of which are required.
       Take note: you are working with an application on the web. It is not saved, it only creates the code you need to make the form. **DO NOT USE** the back button on the browser.
        i. Step 1: name your form, this is the name you will see when viewing reports in CMS.
        ii. Step 2: build your form, you can use the pre made fields provided or make your own under custom fields.
        iii. Step 3: set up the thank you page, this is where people will be taken after clicking “submit”
        iv. Step 4: set up the email addresses, this is where the form data will go once submitted, the from address doesn’t really affect anything but should be a valid email address.
        v. Step 5(optional): set up the thank you email that will be sent to those who complete your form.

    c. Once you have completed these steps, you can preview and edit the form, to use your form, copy and paste the html code and paste it into CMS content. (Unless your form has a textarea box, then you need to paste the code into Notepad and save as .vtl, upload the file to CMS and link to it on your page, more details below).
    d. You might want to save your form as an XML file so that you can reload it later to make edits. To do this, click the Save Form button, copy and paste that code to notebook and save as XML, to reload, paste this form into the Reload Form area and click Reload Form.
    e. The form is laid out in a table so you can change the layout of the form if you know a little bit about html and tables.

2. Reports
    a. To view reports, you need to be added to the Report Viewer group in CMS. This means when you log into CMS, you will see a tab at the top that says Reports. When you click on this tab, you will not see anything. **Click the all button in the lower right** and you will see the reports you have access to. The reports are viewable as an Excel file and you can save them to your computer. If you currently have a report that you would like to see, you need to tell me the name of the report and your user group, for example, if you want to see “training_registration” and you are part of the Music Publisher group, I can go into that report and give Music Publishers access.
    b. Take note that you cannot sort data by date submitted accurately due to the way the date field is formatted. dotCMS is working to fix this.

3. Saving files as Velocity files

Step 1. Cut and paste your code into a notepad file.

Step 2. Save notepad file with vtl extension. Select “Save as type” to show **all files**, type file name in “File Name” field and add “.vtl” to the end. Select SAVE.

Step 3. Upload velocity file to your CMS folder.

Step 4. Put this code in your webpage content where you want the velocity file to appear:

#dotParse('file_name')

Example:

#dotParse('/admissions/forms/velocity/overnight_copy.vtl')

Step 5. Save and publish.

If you need to edit the velocity code, right click on the vtl file in the folder and select edit. On the next screen select “edit text”.