Form Components

Description of Components

The Form heading in the Web Author Toolkit contains a set of various components that allow web authors to create a simple e-mail form within AEM. Using the Form component to create the actual form, various components can be dragged into the form to create the necessary fields wanted. From a text field to dropdown lists or radio groups, as a web author you can construct the data you want to receive and have it e-mailed to a distribution list or monitored account.

Please note: The current form set-up only allows for the e-mailing of data from the form and its components. Choosing any other option like storing data or content, using an e-mail service or workflow set-up, is currently not supported. If a more robust form is required, get an account to use the Stanford Medicine Qualtrics form.

How to Use the Components

1. Add a Heading component to let users know about the form.
2. In the Web Author Toolkit expand the Form heading.
3. Click and drag the Form component onto the page.

The form on the page looks like this:

4. Drag a Form component, such as the Text Field, into form area.
5. You will see dotted purple lines and also the component icon as validation the component can be added. Drop it into place.

The component displays on the web page inside of the form.

6. Edit the component by right clicking and selecting to edit.

7. Enter values in the fields.

<table>
<thead>
<tr>
<th>Element Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Element Name</td>
<td>System field required. No spaces between words. A dash can be used to separate words.</td>
</tr>
<tr>
<td>Title</td>
<td>Displayed on page above text field.</td>
</tr>
<tr>
<td>Hide Title</td>
<td>Leave unchecked.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide if necessary for user to know what to input into field if the title is insufficient.</td>
</tr>
<tr>
<td>Show/Hide</td>
<td>Leave unchecked. Advanced feature.</td>
</tr>
</tbody>
</table>
8. Skip the Initial values tab.
9. Add Constraints if fields are required.

10. Skip the Styling tab. CSS is dictated by the template.
11. Click OK to save changes and see the results.
12. Drag additional components into the form like the Radio Group.

<table>
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<tr>
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<th>System field required. No spaces between words. A dash can be used to separate words.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Displayed on page above text field.</td>
</tr>
<tr>
<td>Hide Title</td>
<td>Leave unchecked.</td>
</tr>
<tr>
<td>Description</td>
<td>Provide if necessary for user to know what to input into field if the title is insufficient.</td>
</tr>
<tr>
<td>Show/Hide</td>
<td>Leave unchecked. Advanced feature.</td>
</tr>
<tr>
<td>Items</td>
<td>Click Add Item to add radio selections.</td>
</tr>
<tr>
<td>Items Load Path</td>
<td>Leave this field blank.</td>
</tr>
</tbody>
</table>

13. Enter title and text information.

Separate words with a dash
14. Add radio items by clicking the “Add Item” link in the Items dialog box. Results look similar.

15. Ignore the Initial Values tab.
16. If data is required, add constraints.
17. Click OK to save.

The form fields appear on the page.

![Form fields](image1)

You can add additional components and configure as necessary. See section “Additional Components”.

18. Configure the form for e-mail. Click Edit.

![Form tab](image2)

This brings up the Form tab. For best practices, create a thank you page. This shows users of the form that they successfully completed the fields and the form was sent.

19. Create the Thank You Page. Then, use the magnifying glass to map to the pages path in your site.

![Thank You Page](image3)
20. Click on the Advanced tab. By default it shows the following fields.

An explanation of the form fields.

21. Click the down arrow for the Action Type.
22. Select the Mail option. No other options are currently supported.
23. Click the down arrow for Action Configuration.

![Image of Action Configuration with fields]

24. Configure the fields to configure the form to send an e-mail.

![Image of Action Configuration with examples]

**Example:**

- **From:** RT Contact Form
- **Mailto:** form-distribution@stanford.edu
- **Subject:** Employee Organization Form Feedback
25. Click OK to save. The form will look similar as it is in edit mode.

26. For the form to submit, it needs a submit button. Click Edit next to the End of Form dialog.
27. Click OK to save. The form will look similar.

28. In the Toolkit, click to preview the form.

29. In order for the form to work successfully, it must be activated. Activate the form and test the results. You should receive the Thank You Page created and configured as part of Step 19. Additionally, verify an e-mail was received at the address configured as part of Step 24.
Additional Components

The only supported components that can be used for form functionality are those located under the Form heading in the Toolkit. Other components can be used like the Panel Builder or Heading components, however a form should be straightforward. Form components should be stacked and not placed side by side.

The Form has the following additional components that can be configured for e-mail forms:

- Address
- Checkbox Group

As there is a Submit button that can be configured during the End of Form steps, it is the button best to use. The Submit Button component can be ignored.

Address

This component collects address information from the submitter. It is customizable as to what address data is required or optional.

1. From the Toolkit, drag the Address component into the form and place where it is needed.

![Address Component](image-url)
2. Hover over and right click component to edit it.
3. The component brings up the dialog for the first tab. Fill in the information for the fields.

4. If there are required fields, click the Constraints tab.

5. Click OK to save changes and see results.
Checkbox Group
The checkbox component allows for a list of items that can be selected using a checkbox. Multiple selections can be checked, allowing for very specific information to be collected.

1. From the Toolkit, drag the Checkbox component into the form and place where it is needed.

2. Hover over the component to highlight it and right click to edit.

3. Enter data in the fields.
4. Add items for the checkboxes. Click Add Item and type in the field. Order using the green arrows or delete using the red circle.
5. To add constraints like requiring items to be selected, click the Constraints tab.

6. Click OK to save and see results on the page.