



## UNIT 8

# Simple Forms and Datasheets

Collecting data input from users involves using form controls. Web browsers (through HTML) support the following types of data input:

- Text field
- Large text area
- Check box
- Selection list
- Radio button
- Hidden fields
- File upload

In addition, CommonSpot supports the following form elements which are extensible using Custom Field Types (covered in the developers course):

- Date
- Email
- Tree control
- URL
- Formatted text block (WYSIWYG editor)
- Floating Point / Integer
- Small text area

Input from a CommonSpot form is automatically saved into a database where it can be retrieved by the CommonSpot Datasheet element. Data can also be automatically emailed to a recipient list or submitted to an action page containing a custom ColdFusion script.

## **Objectives**

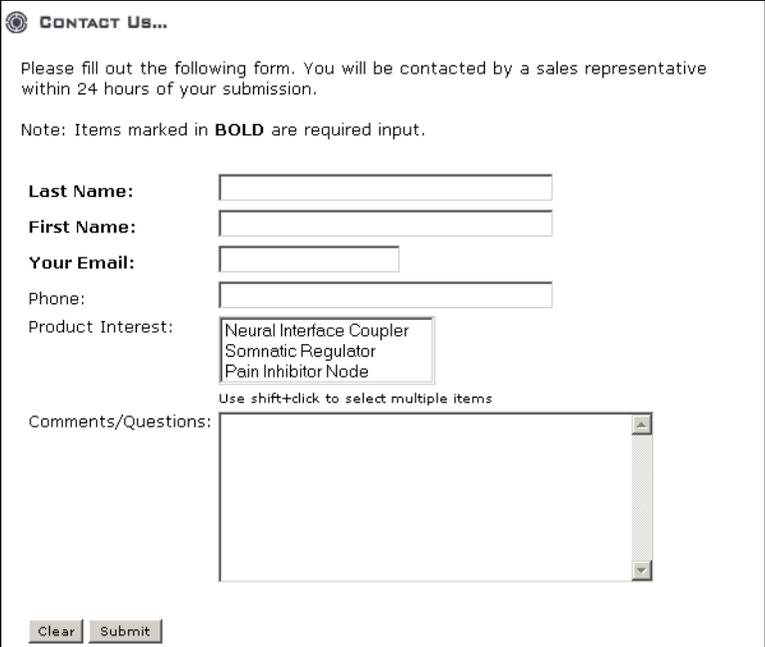
When you complete this unit, you will be able to:

- Create a form using different types of data entry elements
- Email the data entered into a form to a list of users
- Display the data entered into a form through the CommonSpot Datasheet Control

# Walkthrough 8-1: Creating a Simple Mailto Form

## Overview

During this walkthrough, you will create the contact-us form as shown in Figure 8-1. Information entered through this form will be emailed to a list of recipients.



**CONTACT US...**

Please fill out the following form. You will be contacted by a sales representative within 24 hours of your submission.

Note: Items marked in **BOLD>** are required input.

**Last Name:**

**First Name:**

**Your Email:**

Phone:

Product Interest:   
Somnatic Regulator  
Pain Inhibitor Node

Use shift+click to select multiple items

Comments/Questions:

Figure 8-1. Contact Us Form

## Objectives

When you complete this walkthrough, you will be able to:

- Create a simple form
- Have the data entered from a form emailed to a list of recipients
- Require data entry for specific fields

## Steps

### Log In to the Site

Follow these steps to access the Halcyon intranet site:

1. If not already logged in, navigate to the Halcyon\_Lab intranet by typing the following URL into the Address bar of your browser: <http://localhost:8500/lab/login.cfm>, or click the login choice from the View Modes Icon menu.
2. Type the following user name and password, and then click **OK**:  
**user name:** admin-commonspot  
**password:** password

### Create the Contact Us page

During the next steps, you will create the contact.cfm file, which contains the “Contact Us” form. This page will be accessible through the left-hand navigation of the Web site.



3. Click the **Properties & Actions** menu select **Create New Page**. The Create Page window appears.
4. Select **/lab/** from the list of destination sites, and then click **Next**.
5. Select **1X1 Base Template** from the list of simple templates, and then click **Next**.
6. Complete the Create New Page dialog box using the following information and click **NEXT**. The newly created page appears in the browser.

Name: Contact  
Title: Contact Us  
Title Bar Caption: Contact Us

### Set the Form Action

When users click **Submit** on a form, the information they entered is transmitted to a page on the Web server. Typically, the receiving page performs one or more of the following options:

- Saves the form data to a database
- Emails the data to a selected list of email accounts
- Outputs a message to the user confirming their submission has been received

The following steps show you how to designate the email recipients of the submitted form information. Additionally, you enter message users receive after they have submitted the form.

7. Click the ghosted hyperlinked text labeled, “**Click to insert new element.**”
8. In the Element Gallery, select **Simple Form** from the list of miscellaneous elements. The page refreshes.

9. Click the ghosted hyperlinked text labeled, “**Click here to create/select the simple form.**”
10. On the Create/Select Simple Form dialog box, click on the radio button next to **Create New Simple Form** and click **Next**. The New Simple Form Element window appears.
11. In the **Name** box of the form, type **Contact\_Us**.
12. Type your email address into the Email Notification Recipients box.
13. Enter [admin@halcyonneurotech.com](mailto:admin@halcyonneurotech.com) as the anonymous sender's address.
14. Click **Specify Results Text** to display the WYSIWYG editor.
15. Type **Thanks for the feedback!** into the WYSIWYG editor and then click **Finish**.
16. Click **Next** in the New Simple Form Element window.
17. Click on the ghosted link “Click here to define the fields for this form. The Edit Simple Form Fields window will be displayed as shown in Figure 8-2.

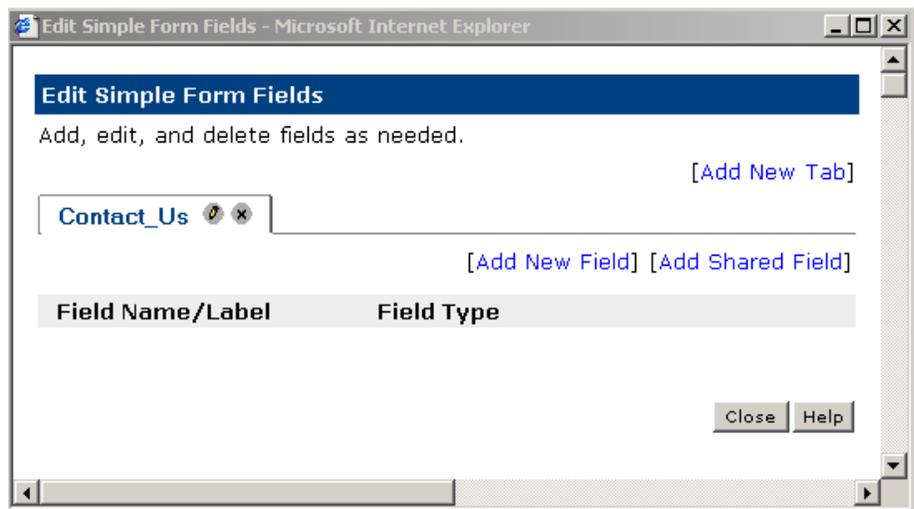


Figure 8-2. Edit Simple Form Fields Window

## Add Text Form Fields

Text fields are used for single-line data entry.

- The **size** of a text field denotes its physical width on a page. If the amount of text exceeds the size, then data in the field will automatically scroll to the left.
- The **maximum width** of a text field indicates the maximum number of characters that may be typed into the area.
- CommonSpot’s **email** field type is a variant of the text field. Data entered into an email field must be in a valid email format or an error message will be displayed upon form submission.

18. Click the hyperlinked text labeled, “**Add New Field.**” The New Form Field window appears.

19. Complete the form as shown in Figures 8-3 and 8-4, and then click **Create**.

New Form Field - Microsoft Internet Explorer

New Form Field

Please select the type of form field you would like to add to your form.

Standard Properties Other Properties Security

Type: Text

Field Name: Last Name

Label: Last Name

Enter a label that will be displayed next to this form field.

Shared Indicate whether or not this field can be shared on other forms.

Required: Yes

Indicate whether or not this field is required to complete the form.

Description:

Enter a description that will be displayed directly underneath this form field.

Check Spelling

Close Create Help

Figure 8-3. New Form Field – Standard Properties Window

New Form Field - Microsoft Internet Explorer

New Form Field

Please select the type of form field you would like to add to your form.

Standard Properties Other Properties Security

Maximum Length: 255

Indicate the maximum length (count of characters) that can be entered in this field.

Size: 30

Enter a display size for this field.

Default Value:

Check Spelling

Close Create Help

Figure 8-4b. New Form Field – Other Properties Window

20. Repeat steps 18 and 19 for the following fields:

FIELD NAME	TYPE	LABEL	REQUIRED	SIZE
First_Name	Text	First Name	Yes	30
Email	Email	Your Email	Yes	30
Phone	Text	Phone	No	30

Note: For the email field, make sure to check the Senders Email checkbox in the Other Properties window.

## Add a Selection List Box

Select boxes allow you to choose item(s) from a list of choices. When the multiple attribute is set, the form element will allow multiple items to be chosen. This is accomplished by holding the CTRL key while clicking on non-adjacent items. Holding the SHIFT key can be used while clicking adjacent items to choose multiples.

21. Click the hyperlinked text labeled, “Add New Field.” To display the New Form Field window and fill it out as indicated by Figure 8-5. Note that items in the value list should be comma-delimited without extra spaces.

The screenshot shows a window titled "New Form Field - Microsoft Internet Explorer". Inside the window is a dialog box titled "New Form Field". The dialog has a blue header bar with the title. Below the header, it says "Please select the type of form field you would like to add to your form." There are three tabs: "Standard Properties" (selected), "Other Properties", and "Security". Under "Standard Properties", there are several fields:
 

- Type:** A dropdown menu with "Selection List" selected.
- Field Name:** A text box containing "Product Interest" with a small yellow plus icon to its right.
- Label:** A text box containing "Product Interest" with a small yellow plus icon to its right. Below it is the instruction: "Enter a label that will be displayed next to this form field."
- Shared:** A checkbox labeled "Shared" with the instruction: "Indicate whether or not this field can be shared on other forms."
- Required:** A dropdown menu with "No" selected. Below it is the instruction: "Indicate whether or not this field is required to complete the form."
- Description:** A text area with a small yellow plus icon to its right. Below it is the instruction: "Enter a description that will be displayed directly underneath this form field."
- Check Spelling:** A checkbox.

 At the bottom of the dialog are three buttons: "Close", "Create", and "Help".

Figure 8-5a. New Form Field – Standard Properties

New Form Field - Microsoft Internet Explorer

**New Form Field**

Please select the type of form field you would like to add to your form.

Standard Properties **Other Properties** Security

**Option List Source:**  Value List  
 Custom Query  
 CommonSpot User Groups  
 ColdFusion Expression  
 Custom Element/Metadata/Simple Form Data

**Option List:** Neural Interface Coupler, Somnatic Regulator, P  
 Enter a comma-delimited list of the options you want to include in this selection list.

**Multiple:** Yes  
 Indicate whether or not users will be allowed to choose more than one option on this selection list.

**Select Option:** No  
 Places a "--Select--" option in the list. Cannot be used with a multiple selection list.

**Size:** 3  
 Enter a display size for this field.

**Default Value:**  ...  
 Enter the option from your option list that you want selected by default.

Check Spelling

Close Create Help

Figure 8-5b. New Form Field – Other Properties

22. Complete the form as shown in Figures 8-5a and 8-5b. For the Option List enter the following: Neural Interface Coupler, Somnatic Regulator, Pain Inhibitor Module. Click **Create** to save the information and create the field.

## Add a Multi-Line Text Area

Text Areas are used to input multiple lines of information. The size of the element on the page is set through the row and column sizes. Word-wrap is in effect for a text area. Users can enter a virtually unlimited amount of text into this field.

23. Click the hyperlinked text labeled, “Add New Field” to display the New Form Field window.

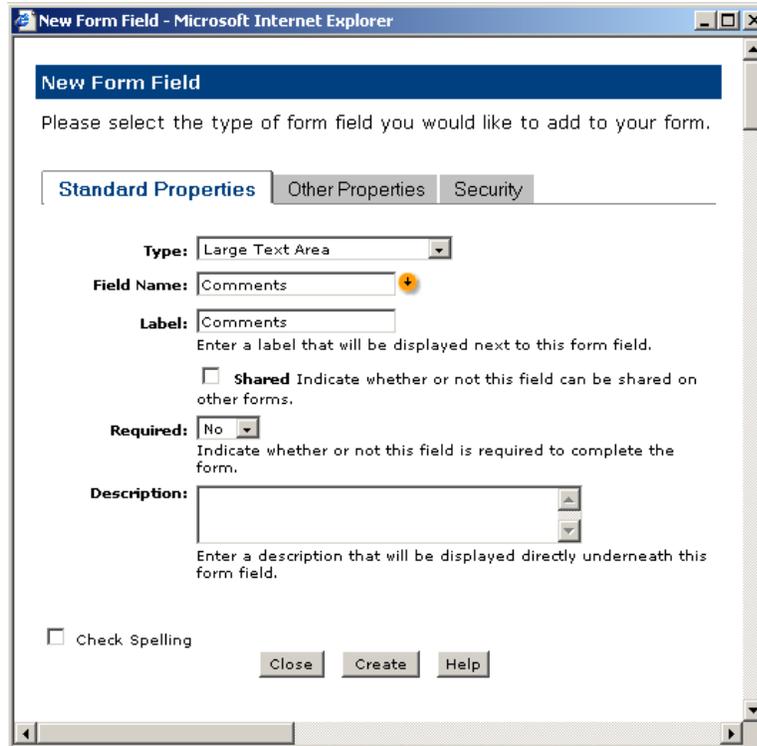


Figure 8-6a. New Form Field – Standard Properties Window

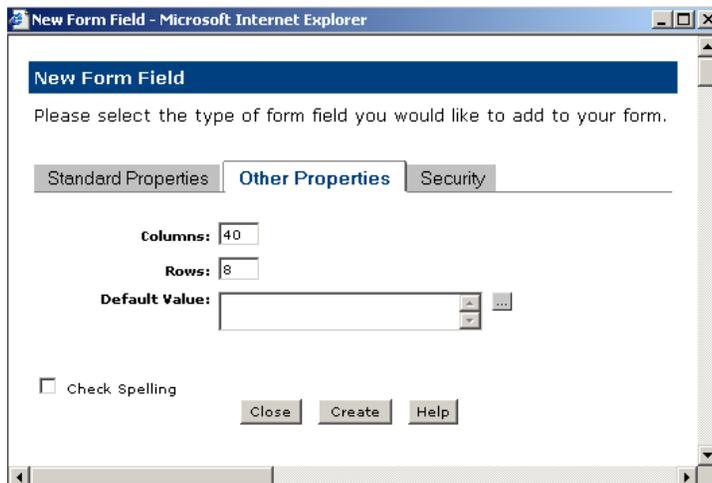


Figure 8-6b. New Form Field – Other Properties Window

24. Complete the form as shown in Figures 8-6a and 8-6b and click **Create**.

### **Test the Form**

25. Close the Edit Simple Form Fields window.
26. Submit the page for publication.
27. Switch to **Read** mode and test the form. Try submitting the form without typing information into the required fields. What happens?
28. After you have successfully submitted a form if your server is connected to an email server an email message will be sent to you.

—End of Walkthrough—

# Walkthrough 8-2: Using the Form to Add Data to the Datasheet Element

## Overview

During this walkthrough, you will create a form to capture the contact information of Halcyon Neurotech staff members. This information will be then be displayed in a CommonSpot Datasheet element where it can be exported or edited.

## Objectives

When you complete this walkthrough, you will be able to:

- Display information entered into a simple form on a Datasheet
- Define Datasheet columns and views

## Steps

### Log In to the Site

Follow these steps to access the Halcyon intranet site:

1. If not already logged in, navigate to the Halcyon\_Lab intranet by typing the following URL into the Address bar of your browser: <http://localhost:8500/lab/login.cfm>, or choosing login from the View Modes Icon menu.
2. Type the following user name and password, and then click **OK**:  
**user name:** admin-commonspot  
**password:** password

### Create the Add Employee Record Page



3. Click the Properties & Actions menu and then select **Create New Page**. The Create Page window appears.
4. Select **Intranet** from the list of destination sites, and then click **Next**.
5. Select **1X1 Base Template** from the list of simple templates, and then click **Next**.
6. Complete the Create New Page form as shown in Figure 8-7, and then click **Next**. The newly created page will appear in the browser.

**Create New Page (from 1x1 Base template)**

Please enter the following information to create a new page. An asterisk (\*) next to a field indicates that the field is required.

**\*Name:**    
 A short name for the page from which the page's url will be derived.

**\*Title:**    
 The title of the page.

**Title Bar Caption:**    
 The title to appear in the browser's caption bar.

**Description:**    
 A brief summary of the page's content.

**Category:**     
 The category this page belongs to.

**Keywords:**    
 Enter a comma delimited list of keywords, or press 'Select Keywords' to choose from a list of existing keywords.

**Publication Date:**     
 Pick the scheduled publication date for this page. Before this date, this page will only be available to authors, approvers, and administrators.

**Confidentiality:**

**Availability:**  Page Index  Page Gallery   
 Page Finder  Search Results   
 Select the places that this page will appear by checking the appropriate options above.

**Expiration:**

**Freshness Reminder:**

Check Spelling

Figure 8-7. Create New Page Form

## Set the Form Action

7. Click the link labeled **Click to insert new element**
8. In the Element Gallery, select **Simple Form** from the list of miscellaneous elements.
9. Click the hyperlinked text labeled **Click here to define the simple form element**. The New Simple Form Element window appears.

10. Choose **Create new Simple Form** from the Create/Select Simple Form window and click the **Next** button.
11. In the Name box of the form, type **Employee\_Information**. Because this information is presented in a datasheet, you do not need to email the data to any recipients.
12. Click **Specify Results Text**. A WYSIWYG editor appears. Type **Thanks for keeping us in the loop!**, and then click **Finish**.
13. Click **Next** in the “New Simple Form Element” window. The page refreshes.

## Add Text Form Fields

14. Click the [+] for the simple form and select **Edit Fields**
15. Click the hyperlinked text labeled, “**Add New Field**” to display the New Form Field window.
16. Complete the form as shown in Figures 8-8a and 8-8b and click **Create**.

The screenshot shows a web browser window titled "New Form Field - Microsoft Internet Explorer". The main content area has a blue header "New Form Field" and a sub-header "Please select the type of form field you would like to add to your form." Below this are three tabs: "Standard Properties" (selected), "Other Properties", and "Security".

Under the "Standard Properties" tab, the following fields are visible:

- Type:** A dropdown menu set to "Text".
- Field Name:** A text input field containing "Last\_Name" with a yellow plus icon to its right.
- Label:** A text input field containing "Last\_Name". Below it is the instruction: "Enter a label that will be displayed next to this form field."
- Shared:** An unchecked checkbox with the text: "Indicate whether or not this field can be shared on other forms."
- Required:** A dropdown menu set to "Yes". Below it is the instruction: "Indicate whether or not this field is required to complete the form."
- Description:** A text area with up and down arrow icons on the right. Below it is the instruction: "Enter a description that will be displayed directly underneath this form field."

At the bottom left, there is an unchecked checkbox labeled "Check Spelling". At the bottom center, there are three buttons: "Close", "Create", and "Help".

Figure 8-8a. New Form Field – Standard Properties Window

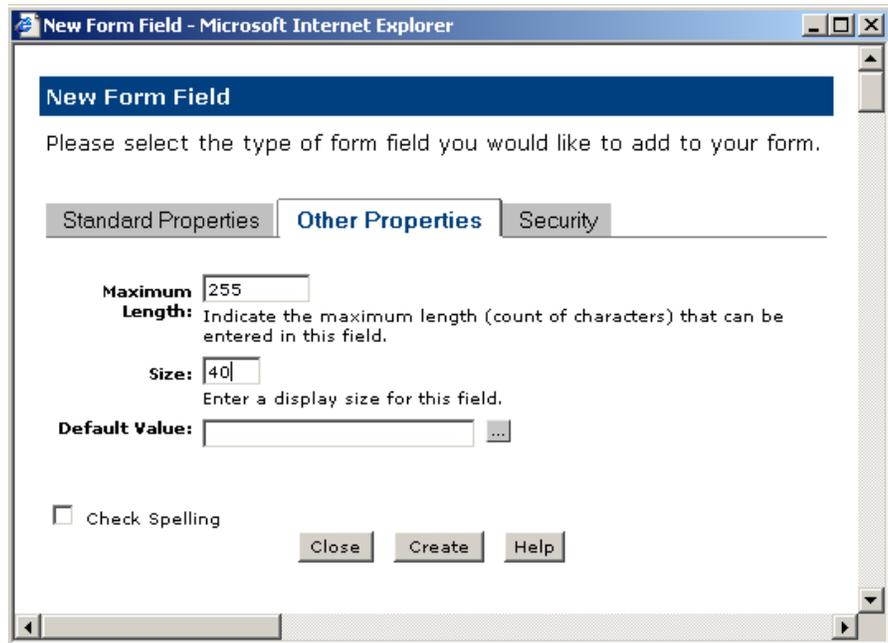


Figure 8-8a. New Form Field – Other Properties Window

17. Repeat steps 15 and 16 for the following fields:

FIELD NAME	TYPE	LABEL	REQUIRED	SIZE
First Name	Text	First Name	Yes	40
Email	Email	Your Email	Yes	40
Office Phone	Text	Office Phone	Yes	40
Home Phone	Text	Home Phone	Yes	40
AOL IM Name	Text	AOL IM Name	No	40
Age	Number(integer)	Age	No	3

18. Click **Close** in the Edit Simple Form Fields window.

19. Submit the page for publication.

## Create the Employee List Page

18. Click the Properties & Actions menu and click **Create New Page** on the menu. The Create Page window appears.
19. Select **/lab/Intranet** from the list of destination sites, and then click **Next**.
20. Select **1 x 1 Base** from the list of Simple Layout Templates.
21. Complete the Create New Page form as shown in Figure 8-9, and then click **Next**. The newly created page appears in the browser.

**Create New Page (from 1x1 Base template)**

Please enter the following information to create a new page. An asterisk (\*) next to a field indicates that the field is required.

**\*Name:** Employees  
A short name for the page from which the page's url will be derived.

**\*Title:** Employees  
The title of the page.

**Title Bar Caption:** Employees  
The title to appear in the browser's caption bar.

**Description:** Employees  
A brief summary of the page's content.

**Category:** Internal Documents New...  
The category this page belongs to.

**Keywords:**  
Enter a comma delimited list of keywords, or press 'Select Keywords' to choose from a list of existing keywords.  
Select Keywords...

**Publication Date:** 06/07/2005 22:46:57 Clear  
Pick the scheduled publication date for this page. Before this date, this page will only be available to authors, approvers, and administrators.

**Confidentiality:** Internal

**Availability:**  
 Page Index  Page Gallery  
 Page Finder  Search Results  
Select the places that this page will appear by checking the appropriate options above.

**Expiration:** Content does not expire

**Freshness Reminder:** No reminder

Check Spelling Next Cancel Help

Figure 8-9. Create New Page Form

## Deploy the Datasheet Element

22. Click the hyperlink labeled **Click here to insert new element**
23. Select **Data Sheet** from the list of miscellaneous elements. The page refreshes.
24. Click the ghosted hyperlinked text labeled, “**Click here to define the Datasheet** element. The Edit Datasheet Views window appears.
25. Click the ghosted hyperlinked text labeled, “**Click here to create a new datasheet view.**”
26. Complete the datasheet view form as shown in Figure 8-10, and then click **Next**.

**Datasheet View**

Please provide the name, description and type of view.

**Name:**

**Private**

**Default View**

**Description:**

**Datasheet Source:**

**Form Result/Custom Element Sheet**  
Display the results of a specified form or custom element data.

**Page Result Sheet**  
Display a list of pages along with standard and/or custom metadata.

**Custom Query Result Sheet**  
Display the results of a custom SQL query.

Check Spelling

Figure 8-10. Datasheet Views Window

27. Select **Employee\_Information** from the list of available forms, and then click **Next**. The Datasheet Columns window (Figure 8-11) appears.

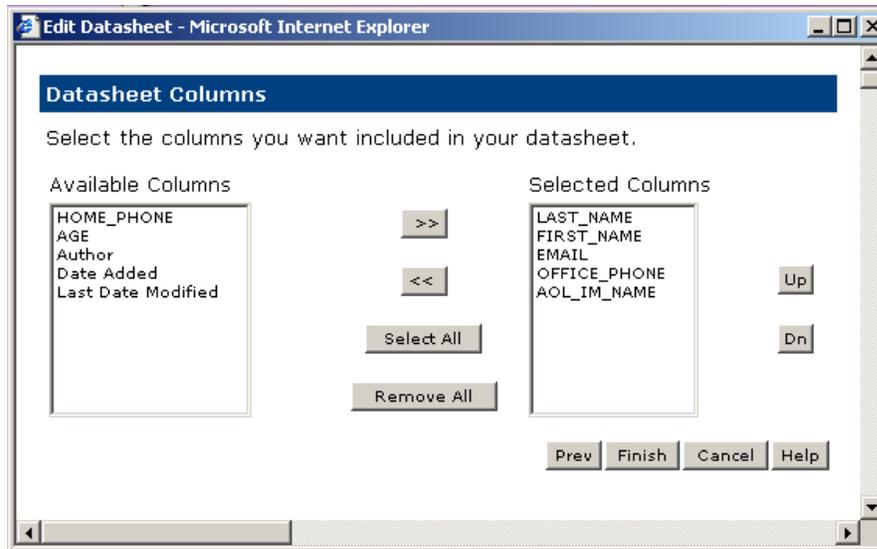


Figure 8-11. Datasheet Columns Window

28. Using the **Move Right (>>)** button, move the following columns into the Selected column:
  - Last\_Name
  - First\_name
  - Email
  - Office\_Phone
  - AOL\_IM\_Name
29. Click **Finish**. The page refreshes to display the list of datasheet views.
30. Click the **Close** button to close the datasheet view dialog box.

## Define the Column Formatting

- +** 31. Click the Edit Datasheet icon and select **Edit Columns** from the list of available menu options.
32. Select the Last\_Name column, and then click **Edit**. The Edit Column Properties window appears as shown in Figure 8-12.

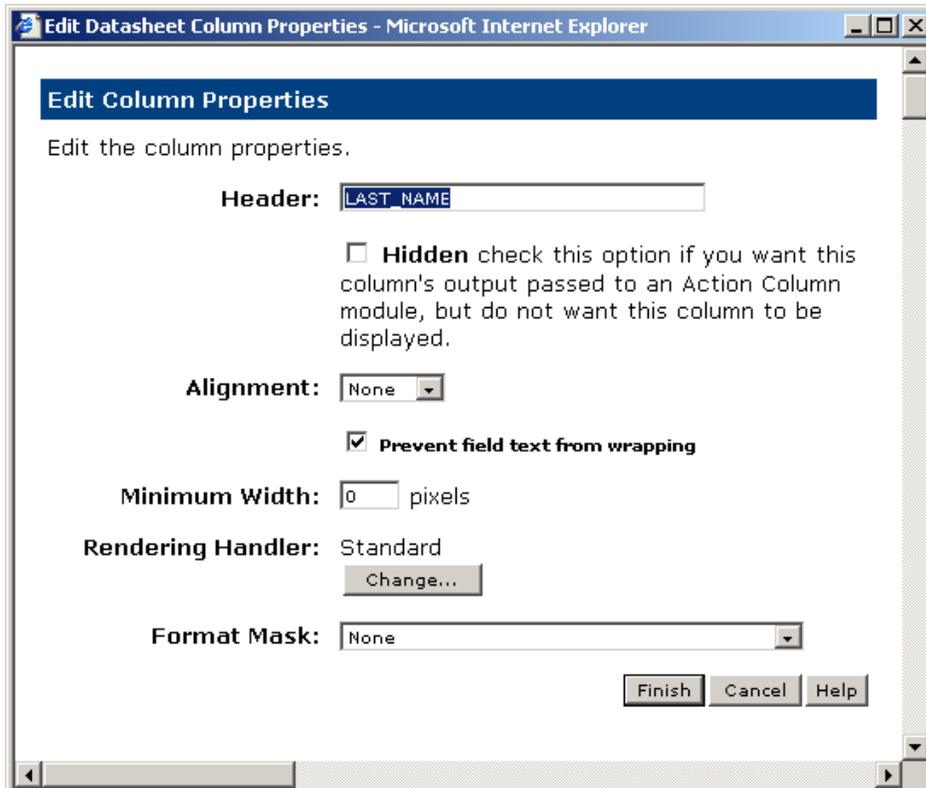


Figure 8-12. Edit Column Properties Window

33. Change header attribute to read **Last Name**, and then click **Finish**.
34. Repeat steps 31-33 for the rest of the columns, changing the header text to title case. For the Email column, set a format mask to **Email**.
35. Click **Close** to close the Datasheet View Column Properties window.
36. Click **Close** to close the Datasheet Column Properties window.
37. Submit the page for publication.

## Add Action Columns

The CommonSpot Data Sheet Component allows you to add additional action columns that when clicked will either pop-up a data entry interface for the record or delete a record. Complete the following steps to add action columns to your data sheet.

38. Click on the edit data sheet icon  and select **Edit Columns** from the menu.
39. Click on the gray hyperlinked text **Add a new action column**. Fill out the Action Column dialog properties box as depicted in Figure 8-13. This will allow uses to edit employee data.

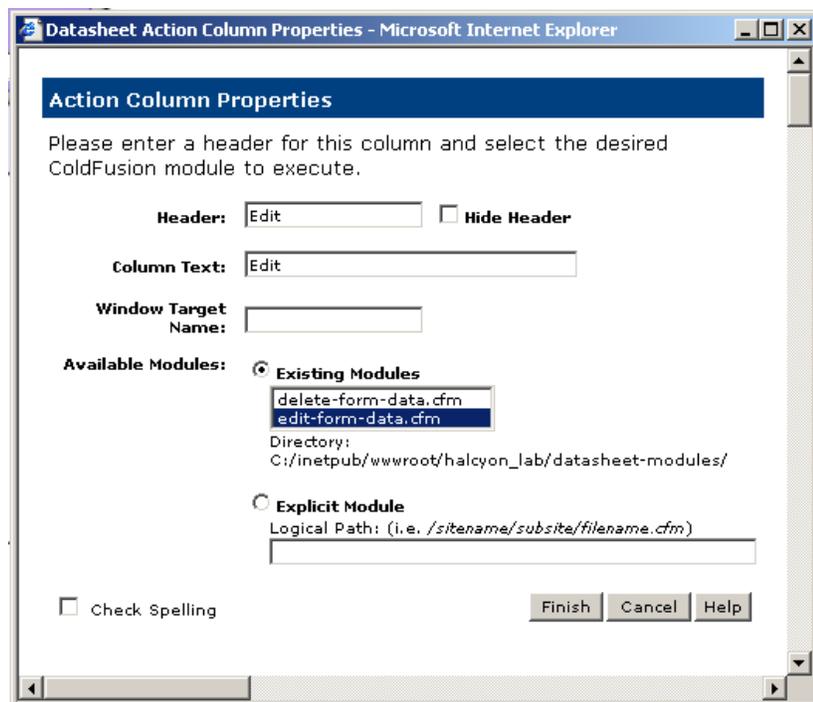


Figure 8-13: Action column properties.

40. Click the **Finish** button.
41. Click the **Close** button to close the Datasheet View Column Properties window.
42. Click the Close button to close the Datasheet Column Properties window.

## Add a Link to the Employee Form Page

43. Click the tabular layout cell icon to expose the cell properties buttons.
44. Click on the **cell properties** button, click **More...** and select **Insert/Copy Rows** from the list of available menu options.
45. On the **Tabular Layout Element – Insert Row** window, insert one new empty row before the datasheet. This row will be used to display a link to add data to the datasheet.
46. Click the labeled, “**Click here to insert new element.**”
47. Select **Formatted Text Block (without header)** from the list of text elements.
48. Click the ghosted text “Click here to define the textblock”.
49. In the formatted text block, type **Click here to add yourself to the employee list.**
50. Using the WYSIWYG hyperlink tool, link the word **here** to the **employeeadd.cfm** file.
51. Click the Finish button to close the **Insert Link to Existing Page** window, and the **Finish** button to close the Formatted Text Block window.
52. Submit the page for publication and switch to **Read** mode.

## Test the Employee Form and Datasheet

53. Click the hyperlinked text labeled, “**here.**”
54. Complete the employee information form, and then click **Submit**.
55. Click the **Employee List** hyperlink in the left navigation area. The employee data that you entered appears in the datasheet.

—End of Walkthrough—