

Bitrix Site Manager 4.0

Web Form Creation Quick Start Guide



Contents

Introduction.....	3
Creating and customizing a web form	4
Creating and customizing a web form	4
Creating a web form	4
Navigating through the web form settings.....	6
Creating web form questions	7
Adding web form status	9
Placing the web form on a site page.....	11
Creating a “Web form completion” page.....	11
Creating the “Result list” page.....	13
Creating pages “View results” and “Edit results”	15
Results	16

Introduction

This manual describes how to create and publish a web form using the **Feedback form** example. This web form can be used by an administrator to receive messages and questions from the site visitors.

In the example, the web form contains the following 5 fields:

1. your name;
2. company;
3. e-mail;
4. telephone number;
5. message body.

It will be placed in the **Company** site section whose menu will contain the **Feedback** item for instant access to a web form.

Process of creating and placing a web form consists of the following main steps:

1. creating the web form;
2. customizing the web form parameters;
3. creating the web form questions;
4. creating the web form statuses;
5. placing the web form components on the site pages.

Creating and customizing a web form

Creating a web form

1. Open the forms list in the administrative section (**Web forms > Manage forms**).
2. Click **Add** to switch to a new web form creation.
3. Type the name of the new web form in the **Name** field. In our case: **Feedback form**.
4. Type a unique symbolic code of the form in the field **Symbolic identifier** (for example, **feedback**). This code can be used to customize the web form appearance in the public section of the site (Latin letters and numbers can only be used).
5. Specify the sort order (web form position of the in the list of web forms). The higher is the value, the lower this web form is in the list. For example, if there are web forms with the sorting values 100, 200, 300 already exist, the new form with the sort order 400 will be the forth in this list.
6. Specify menu items of the administrative site section linked to the result table. For example, **Feedback form** is the menu item for English interface.
7. Select the site on which the web form is to be displayed.
8. Specify the text which will be on the web form results sending button (for example, **Send**).

*Name:	<input type="text" value="Feed back form"/>				
*Symbolic identifier:	<input type="text" value="feedback_en"/>				
Sorting:	<input type="text" value="400"/>				
Menu items in admin section:	<table border="1"> <tr> <td>Russian</td> <td><input type="text" value="Форма обратной связи (англ.)"/></td> </tr> <tr> <td>English</td> <td><input type="text" value="Feed back form"/></td> </tr> </table>	Russian	<input type="text" value="Форма обратной связи (англ.)"/>	English	<input type="text" value="Feed back form"/>
Russian	<input type="text" value="Форма обратной связи (англ.)"/>				
English	<input type="text" value="Feed back form"/>				
Form sites:	<input type="checkbox"/> [ru] DemoSite <input checked="" type="checkbox"/> [en] International				
Button text:	<input type="text" value="Send"/>				

9. Load an image from the local computer. The image will be shown in the public section beside the web form name and description.
10. Create the web form description. It may be created in the form of the common text or HTML code.

Description

Image:

Text /
 HTML
 Use visual editor

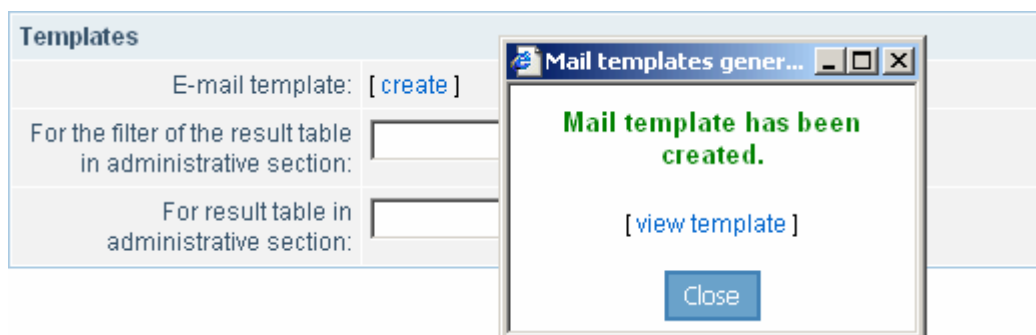
(no style) Times New Roman 3

Should you have any questions, use this feedback form to send message to our **Information Service**.

11. You can specify templates for:
 - § result table filtering in administrative section;

§ mail template for sending results by e-mail (automatic generation of the mail templates is provided).

12. The button **Create** located near the mail template generates a mail template. (This button is displayed only after questions are added to the web form. After you have created questions, switch back to the web form settings section and generate an e-mail template).



By using **view template** link you can see how this template will look in the public section.

13. To register the form filling and saving events in the **Statistics module** via the event registration mechanism (which also allows to track daily dynamics of the web form filling and build the diagram), specify the event type identifiers for the **Statistics module** in the form settings. For example, **event1=form** and **event2=feedback**.

New message registration in the Statistics module	
event1:	<input type="text" value="form"/>
event2:	<input type="text" value="feedback_en"/> event1 , event2: event type identifiers
event3:	<input type="text"/> event3: auxiliary parameter

14. The section **Group rights for this form** is used to assign different access rights to user groups to handle this web form. The following rights are possible:

- § access denied;
- § filling in the form;
- § edit own result according to its status;
- § edit all results according to their statuses;
- § view form parameters;
- § full access.

Group rights for this form	
Everyone:	<input type="text" value="default - [10] filling in the form"/>
Registered users:	<input type="text" value="default - [10] filling in the form"/>
Partners:	<input type="text" value="default - [10] filling in the form"/>
Customers:	<input type="text" value="default - [10] filling in the form"/>

In this case, all user groups are allowed to fill in the form.

15. Click **Add** to save the new web form.

Navigating through the web form settings

The following two menu types can be used for navigation through the web form settings sections:

1. Menu located at the top of a form settings pages (those devoted to creating and editing forms, questions, status, form fields);

▶ Form list	▶ Statures [1] [+]	▶ New web-form
	▶ Questions [11] [+]	▶ Copy web-form
	▶ Fields [0] [+]	▶ Delete results
	▶ Results [1]	▶ Delete web-form

2. Menu whose items are located in the column **ID** of the web form list (**Web form > Form settings**).

ID ▲ ▼	Sites	Sort. ▲ ▼	Symbolic identifier ▲ ▼	Title ▲ ▼	Actions
11 [Questions] 11 [+] [Fields] 0 [+] [Statures] 1 [+] [Results] 1	en	400	feedback_en	Feed back form	Modify Copy Preview Erase Delete

Creating web form questions

This section describes the process of adding the web form questions. The questions will be located in the web form body in the format “**text body – field for answer**”.

The following steps are required to add a question (for example, “**Your name**”).

1. Click **Questions** to switch to the list of web form questions.
2. Click **Add** to create a new question.
3. Check the box **Active**, which means the question will be displayed on the web form in the site public section.
4. Specify value of the field **Sorting**. This value determines the question location in the list: The lower is the field value, the higher is the question in the list.
5. Type a unique **Symbolic identifier** of the question.
6. Check the box **Required**, which means the answer to this question is required.

Active:	<input checked="" type="checkbox"/>
Sorting:	<input type="text" value="100"/>
*Symbolic identifier:	<input type="text" value="feedback_name_en"/>
Required:	<input checked="" type="checkbox"/>

7. If necessary, load the question image from the local computer.
8. Type the question text in the text or HTML format. You can use the HTML editor.

Question

Image:

Text/ HTML Use visual editor

Name


9. Set the answer field format:
 - § as the question “Your name” does not have any variants for answer, you should insert a space in the field **Text**;
 - § leave the field **Value** empty;
 - § as the answer will be entered in the form of the arbitrary single line text, select **Text** in the drop-down list **Field type**;
 - § specify the text field width in the field **Width**, for example, it may be set to 80 text symbols;
 - § check the box **Active** to activate this answer field.

Answer fields									
ID	Text ¹	Value	Field type	Width	Height	Parameters	Sort.	Active	Del.
	[ANSWER_TEXT]	[ANSWER_VALUE]	text	80			100	<input checked="" type="checkbox"/>	

10. To show answers in the result table, check the corresponding boxes and specify column header in the table.

Show results	
Show in the result table:	<input checked="" type="checkbox"/>
Show in the Excel result table:	<input checked="" type="checkbox"/>
Column header in the result table:	<input type="text" value="Name"/>

11. Select **text field** in the **Filter fields** list to indicate that the answer is to be treated as text when activating the table filter.

Filter fields	
for entered value: <i>Ctrl+</i> 	<div style="border: 1px solid black; padding: 2px;"> <p>text field</p> <p>numeric interval</p> <p>date interval</p> <p>existence flag</p> </div>

12. Click **Add** to save new question.

Other questions are added in the same way, except some parameters:

- § Questions **Company** and **Phone number** are not required to be answered. That is why you don't check box **Required**.
- § User-supplied text in the field **Message text** may contain more than one line. Therefore, select value **textarea** (multiline text) in the field with the list **Field type**. Values of the both fields **Width** (e.g. 80) and **Height** (e.g. 4) should be specified.

Adding web form status

For each form result, a certain status can be specified, for example: *on approval, published, declined* etc. The status may be assigned different access permissions for different user groups, as well as it can be specified for the status creator individually.

Note!

At least **one status** must be assigned to each form. Otherwise, the form completion results will not be saved and mail messages will not be sent.





This section describes how to create an **Accepted** status, which means that the form completion results are received and approved.

The following actions are required to create a new status:

1. Switch to the status list using link **Statuses**.
2. Click **Add** to add a new status.
3. Check box **Active** to activate this status.
4. Enter the created status title.
5. Enter a brief description of this status in **Description**. Message was received and submitted to responsible department



Active:	<input checked="" type="checkbox"/>
* Title:	<input type="text" value="Submitted"/>
Description:	<input type="text" value="Message was received and submitted to the responsible department"/>
Sorting:	<input type="text" value="100"/>

6. Values of the field **CSS class used to display the status title** and fields used to specify **file handlers** can be left the default.
7. Select user groups having the specified permissions in the fields **User group permissions**.

<p>Can set this status for the results [MOVE] Ctrl+ </p>	<ul style="list-style-type: none"> [6] Customers [4] Content editors [8] Techsupport administrators [7] Techsupport staff [9] Advertising administrators [10] Advertisers [13] Advertising managers [12] Workflow administrators
<p>Can view results in this status [VIEW] Ctrl+ </p>	<ul style="list-style-type: none"> [6] Customers [4] Content editors [8] Techsupport administrators [7] Techsupport staff [9] Advertising administrators [10] Advertisers [13] Advertising managers [12] Workflow administrators
<p>Can edit results in this status [EDIT] Ctrl+ </p>	<ul style="list-style-type: none"> [5] Partners [6] Customers [4] Content editors [8] Techsupport administrators [7] Techsupport staff [9] Advertising administrators [10] Advertisers [13] Advertising managers
<p>Can delete results in this status [DELETE] Ctrl+ </p>	<ul style="list-style-type: none"> [5] Partners [6] Customers [4] Content editors [8] Techsupport administrators [7] Techsupport staff [9] Advertising administrators [10] Advertisers [13] Advertising managers

8. Click **Add** to save the new status.

Placing the web form on a site page


Placing the web form in the site public section is achieved by using the visual editor and the web form components. To switch to the visual editor, you can use buttons  (create a new page in the current section) or  (edit current page) located on the toolbar in the site public section. You can create the following pages to handle web form in the site public section:

- § web form filling page;
- § page with the list of web form results;
- § detailed view page;
- § result editing page.

You may find examples of these pages in the **Results** chapter.

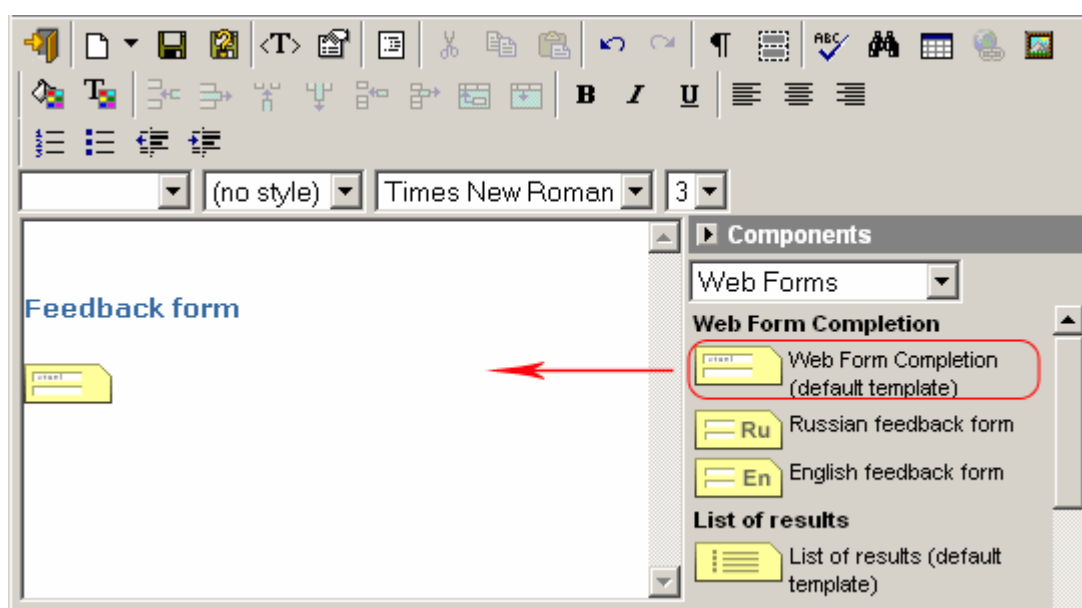
The example considers placing the web form on a new page using components.

The following steps are to be performed.

1. Switch to the site public section.
2. First, switch to the site section in which the web form will be placed. In this example, it will be placed in the **Company** section.
3. Click  (create a new page in the current section).
4. Select the **Web forms** item on the **Components** bar on the right.

Creating a “Web form completion” page

1. Select the component **Web form completion (default template)** and drag-and-drop it into the page.



2. After adding the component, the component properties bar becomes visible (if the bar is not visible, click the added component).

Web Form Completion (default template) - [Web Forms]	
Web form ID:	[11] Feed back form
Result list page:	result_list.php
Result editing page:	result_edit.php
Name of additional navigation chain item:	Contacts
Link for additional navigation chain item:	/about/contacts.php

The bar contains the following fields:

- § **Web form ID:** select the web form you want to display in the site public section (i.e. connect it to the added component). In this case, it is **Feedback form** with **ID=11**.
 - § **Result list page:** by default this field has a value of **result_list.php**. This field should contain name of the page on which the web form completion results will be displayed. Page **result_list.php** *is not generated* automatically. Therefore, it must be created prior or after the component **Web form completion** becomes configured. In the example, this page will be created after the component **Web form completion** becomes configured.
 - § **Result editing page:** the default value of this field is **result_edit.php**. This field should contain name of the page on which the web form completion results will be edited. Page **result_edit.php** *is not generated* automatically. Therefore, it must be created prior or after the component **Web form completion** becomes configured.
 - § **Name of additional navigation chain item:** specify here the name of a navigation chain item. In our example, the navigation chain will look something like the following: **Home/ About/ Contacts**.
 - § **Link for additional navigation chain item:** specify here the link that is to be applied to an additional navigation chain item. In our case, it will be **/about/contacts.php** referring to the section **Contacts**.
3. After you configure the component, you have to save the page.
 4. The menu item **Save as...** opens a dialog box allowing to select a folder where the created page will be located as well as specify the name to be displayed in the page body when opening it in the site public section.

Save in folder: ... about

Name	Size	Uploaded
anketa		05/23/2005 19:27:49
gallery		05/23/2005 19:27:49
news		05/23/2005 19:27:49
contacts.php	995	10/05/2005 12:53:55
index.php	1762	01/27/2005 12:13:16

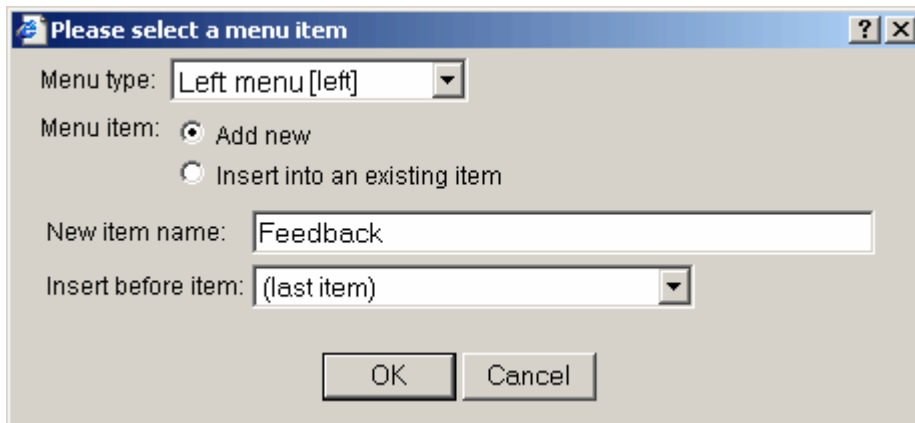
File name: contacts.php

Page title: Information service


Add to menu: (do not add)

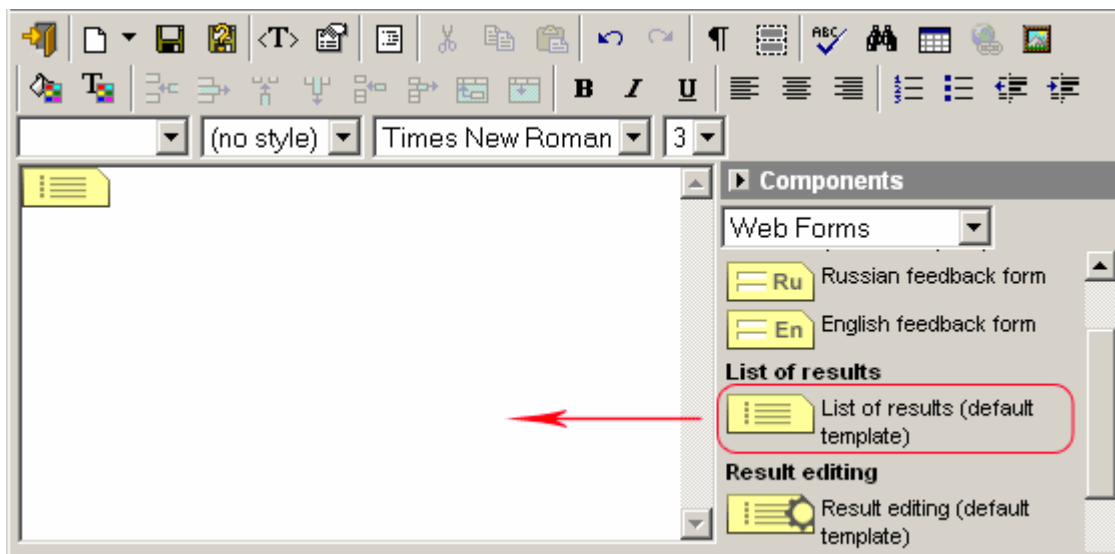
OK Cancel

Using the option **Add to menu**, you can select a menu in which the link to the page containing this web form will be added.



Creating the “Result list” page

1. Click  (create a new page in the current section) to create the **Result list page** in the same site section (for example, **Catalogue**).
2. Add the **Result list** component to the **Result list page** (**Components** bar, drop-down menu item **Web forms**). The page will contain the full list of visitors who have filled in the form and the data they have provided.

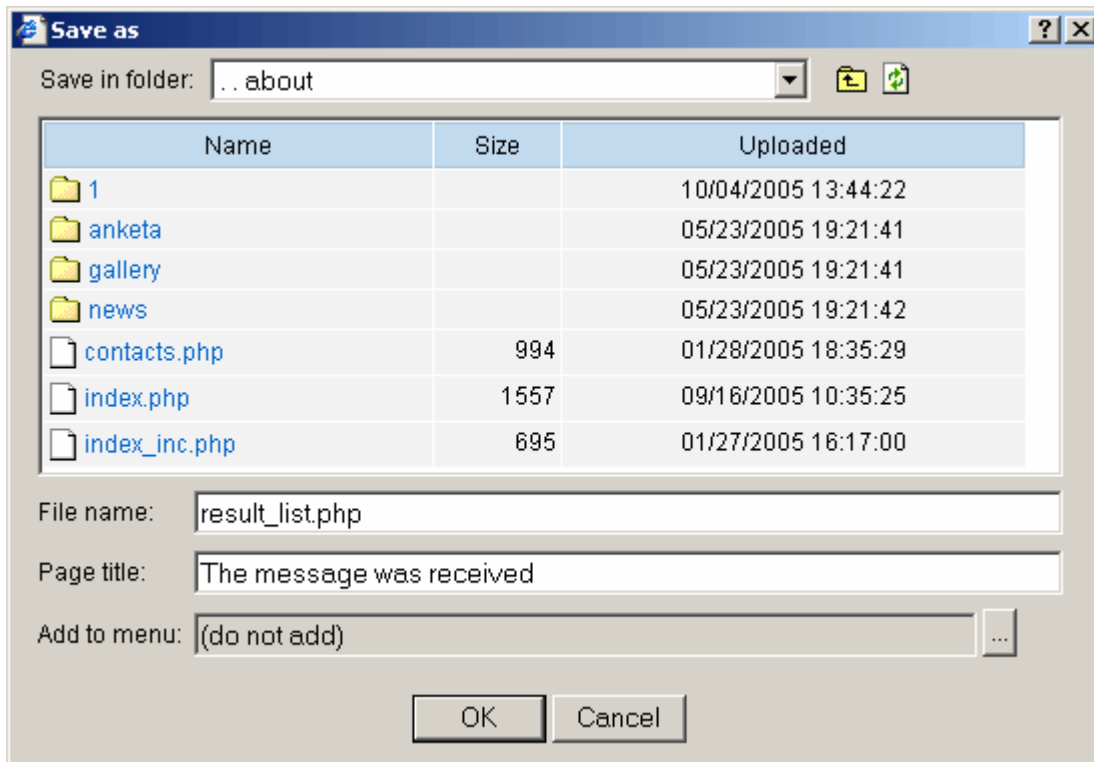


After the component is added, the component properties bar becomes visible (if the bar is not visible, click the added component).

List of results (default template) - [Web Forms]	
Web form ID:	[11] Feed back form <input type="text" value="=-{\$_REQUEST['WEB_FORM_ID']}"/>
Result view page:	result_view.php
Result editing page:	result_edit.php
New result creation page:	result_new.php
Show auxiliary web form fields in a table of results:	no
Show value ANSWER_VALUE in a table of results:	no
Show status for each result in a table of results:	yes
Codes of fields that are not allowed to show in the filter (comma-separated):	email, tel
Codes of fields that are not allowed to show in the table (comma-separated):	email, tel

The bar contains the following fields:

- § **Web form ID:** select the web form you want to display in the site public section (i.e. connect it to the placed component). In this case, it is **Feedback form** with **ID=11**.
 - § **Result view page:** by default this field has value **result_view.php**. This field should contain name of the page on which the web form completion results can be viewed. Page **result_view.php** is *not* generated automatically. Make sure the page with this name already exists; otherwise create it after configuring the component **Result list**.
 - § **Result editing page:** by default, this field has a value of **result_edit.php**. This field should contain name of the page on which the obtained results will be edited. Page **result_edit.php** is not generated automatically. Make sure the page with such name already exists; otherwise create it after configuring the component **Result list**.
 - § **New result creation page:** by default this field has a value of **result_new.php**. This field should contain name of the page to contain the new result after editing.
 - § **Show auxiliary web form fields in a table of results:** enables or disables additional fields in the table of results. In our example, these fields values are not created; therefore, this field has a value of **no**.
 - § **Show value ANSWER_VALUE in a table of results:** enables or disables **ANSWER_VALUE** fields in the table of results. In our example, the fields are not created; therefore, this field has a value of **no**.
 - § **Show status for each result in a table of results:** enables or disables result status in the table of results.
 - § **Codes of fields that are not allowed to show in the filter** and **Codes of fields that are not allowed to show in the table:** specify here mnemonic codes of the fields which will not be displayed in the result table and filter. For example, fields **E-mail** and **Phone number** will not be displayed when creating web form questions (see also [Creating web form questions](#)).
9. After configuring the component, you have to save the page.
 10. The menu item **Save as...** allows to select a folder where the created page will be saved and specify its name to be displayed in the page body when it is opened in the site public section.



This page is to be saved with the name specified in the **Web form completion** component settings (see pt. 6).

Creating pages “View results” and “Edit results”

If required, you may create the **Result view page** and the **Result edit page**. Creating these pages is similar to those described above: create a page, add a corresponding component (**view result** and **edit result**) to the page, configure the component and save the page.

Results

1. To review the results of our work, switch to the site public section in which the web form has been placed. In our case, it is the **Company** section.
2. The left menu of this section now contains the item **Feedback**. The page work area displays a web form for completion. Click **Send** to send a new message.


The screenshot shows a web page with a left sidebar and a main content area. The sidebar contains a navigation menu with items: About Us, Company News, Photogallery, Filling a seminar application form, Seminar form management, and Feedback. Below the menu are sections for Site search, Authorization (with login fields and a 'Login' button), and Currency rates (\$1 = 28.16 RUR). The main content area has a breadcrumb trail 'Home / About Us / Contacts', a title 'Information service', and a 'Print version' link. Below this is the 'Feedback form' section, which includes a message icon and text: 'Should you have any questions, use this feedback form to send message to our Information Service.' The form itself has the following fields: Name* (filled with 'Pavel'), Company name (filled with 'My company'), E-mail* (filled with 'my@e-mail.com'), Phone (filled with '321987'), and Message* (a text area filled with 'I would like to get more information about your product features.'). At the bottom of the form are buttons for 'Send', 'Apply', and 'Reset'. A legend indicates '* - Required fields'.

3. After the message has been sent, a user will be able to view the result list or the result itself, edit it or delete (according to their permissions; see also pt.8 Adding web form status). Viewing and editing the result are possible if only the **Result view page** and the **Result edit page** have been created and the user has enough permissions for these actions.

3.1. Result list view page.

[Home / About Us](#)

The message was received

 [Print version](#)

Thank you. Your data was successfully saved.

[filter is not set] [Show/hide filter]

<input type="checkbox"/> ID ▲ ▼	Modified ▲ ▼	Modified by ▲ ▼	[192] Name	[193] Company name	[198] Message
Status ▲ ▼		Visitor Session ▲ ▼			
<input type="checkbox"/> ID: 51					
Status: [Submitted] change to <input type="text"/>					
[Edit] [View] [Delete]	10/05/2005 17:05:55	[1] (not authorized) [2] (867)	Pavel	My company	I would like to get more information about your product features.

3.2. Result view page.

[Home / About Us](#)

Result view

 [Print version](#)

[Edit]

ID: 51

Form: [10] (feedback_en) Feed back form

Created: 10/05/2005 17:05:55 [1] (not authorized)

Modified: 10/05/2005 17:05:55

Visitor: [2]


Session: [867]

Current status: [Submitted]

Name	Pavel
Company name	My company
E-mail	my@e-mail.com
Phone	321987
Message	I would like to get more information about your product features.

3.3. Result edit page.


Result editing

 [Print version](#)

[[View](#)]

ID: 51
Form: [10] (feedback_en) Feed back form
Created: 10/05/2005 17:05:55 [1] (not authorized)
Modified: 10/05/2005 17:05:55
Visitor: [2]
Session: [667]

Current status: [Submitted] change to

 Should you have any questions, use this feedback form to send message to our **Information Service.**

Name*

Company name

E-mail*

Phone

Message*

* - Required fields