

DataFormer Users Manual

I Login

Lets Start

As a new user, click “**New Users Click Here to Make Your Own Free Form**”

Enter the few required questions.

The line “**Name of Directory for your Forms**” will be part of the address on the internet for your forms.

Click Submit.

Enter name for your new form. Lets call it “*DataFormer Users Conference*”

Click Submit.

You will be taken to the design area for your new form.

II Designing A Form

The tab “**DESIGN**” on top will be darker in color than the others showing you are in the From Design Area. You will also see a few instructions for inserting data fields and headings into your new form.

Let's start desinging!

Click on the “**Headings / Titles**” button located in the field menu at the bottom of your screen. This will set up the Title for your Form.

The **Headings / Titles Editor** window will pop up. Make sure your browser isn't blocking this popup. Allow “Pop Ups for this Web Page” in your browser if it is.

In the pop up window you will see an editing box, this is where you put your Heading /Title. Type in your Heading. “**Dataformer 2005 National Users Conference**”

After inserting the Heading Text, use the toolbar above the editing box to format your text. All formatting is done by high lighting the text with your curser then clicking the desired button in the formatting toolbar.

Let's Format the Heading.

Center the Heading.

Change the color of your heading to Dark Blue.

Increase the font size to 16.

Finally click Submit.

Your main window will refresh and the heading will appear.

Next Click on the “**Picture / Text**” button located in the field menu at the bottom of your screen. This will add a picture or image to your form

The **Picture / Text Editor** window will pop up.

In the pop up window you will see your editing box, this is where you put your Picture.

You can copy an image from any Web Page on the Internet or use the image insert tool located on the formatting toolbar.

For practice let's use the image tool.

Click on the image button. (It looks like a framed picture of a mountain)

The image insert toolbox will appear.

Put in the image address. "http://www.vts.com/FORMIT/dfimages/datalogoweb.gif"

Then position as baseline.

Click OK

Center the picture using the centering button in the formatting toolbar.

In the drop down "Percentage of Row Used" choose 100 percent to use the entire line.

Click Submit

Your main window will refresh and the Image will appear.

Note: Headings will always use up an entire line on your form. All other fields will ask for the percentage of the row you will want a field to occupy.

Let's start adding the input fields.

Click on the "**General Input**" button located in the field menu at the bottom of your screen. This will add input fields to your form

The **General Input Editor** window will pop up.

In the pop up window you will see your editing box, this is where you put in your label / question for your new General Input Field.

You format your label / question just as you did in the Headings Editor.

Other options for this type of field are.

- Length of Input - Amount of space the input field displays for user input.
- Default Value - Value shown when user opens form
- Required Field - Require the user to input data .
- Numerals Only - Only integers are accepted
- Font Case – Instruct DataFormer how to translate user input into the database.
- Include Calendar – Will put a little calendar for date selection next to field.
- Office Use Only – This will become a field for your eyes only it will not appear on the form.

Let's create an input field.

Type in "First Name" as our field label / question

Make it Required

Put in the text First Name as default

Make the length of input field 30.

Choose Title Case in Drop Down Box as your Font Case to force just the first letter of input to be capitalized.

Finally click Submit.

Your main window will refresh and the input field will appear.

Create the following fields also. Last Name, Email Address and Phone

Next Click on the “**Drop Down**” button located in the field menu at the bottom of your screen. This will add a Drop Down Menu field to your form

The **Drop Down Editor** window will pop up.

It has some of the options as the General Input Editor but we can also select the options for your drop down menu.

Let’s create a drop down menu box.

Label your field “Shirt Size” by typing it into the editor box.

Add the following options for your drop down menu.

S, M, L, XL, XXL

Click Submit

Your main window will refresh and the Drop Down Menu Field will appear.

Note: You can add or change the options for this drop down field later by using the editing tool that we will explain later.

There are some other buttons in the field menu to note:

Check Box – Creating a check box allows you to force a user to make a yes/no decision.

Forcing a Line Break - Forces a break in the form to insure the next field starts on its own line. No Editing window will appear when creating a line break.

Radio Button – This is just like a drop down but with little check boxes options instead of drop down options.

Once you are done with your form design you might want to make some changes.

Editing a Field

To edit the field, click on the **E** next to field you would like to edit.

Let’s edit a field.

Lets change the First Name field to Whole Name field.

Click the **E** next to First Name.

In the pop up editor change the question / label to Whole Name.

Change Percentage of Row used to 60 to make more room for input.

Change default to Whole Name from First Name.

Click Submit

Your main window will refresh and the changes will appear.

Moving a Field

To move a field, click on the **M** next to field you would like to move.

Let's move a field.

Move the **DataFormer Image** above the Heading.

Click the **M** next to the Image.

In the pop up editor click the single arrow up to move the field up one space.

The window will automatically close and the Image will now appear above the heading.

When moving a field you have 4 options.

- Down One
- Down to Very Bottom
- Up One
- Up to Very Top

Deleting a Field

To delete a field, click on the **D** next to field you would like to delete.

The design window will refresh and the field chosen will be gone.

Let's delete the Last Name Field since we now have Whole Name.

Click on the **D** next to "Last Name"

You will be asked to confirm your deletion click yes.

The window will automatically close and the Last Name will be gone from your form.

III Layout of Form

Three options to select from in this area.

- Background color of Form.
- Borders or no borders separating fields.
- Secure Server Icon displayed or not displayed.

Let's change the layout of our form.

The background by default is White lets change the color to Aqua.

Next click on the borders drop down. Choose **No** for No borders.

Finally click **Yes** on the Secure Connection drop down. This will display the Encryption Security Icon.

IV Confirms

This area refers to the feedback that the user gets when finished in-putting data and clicking the submit button.

Web Page Confirmation

This is the Web Page that appears immediately after a user of your form clicks the submit button. The Web Page you create can be a full color Web Page with information pulled right from the input data the user submitted.

Let's create a Web Page confirmation.

Click the “**Web Page Confirmation**” link.

In the Confirmation Editor type in “Thank you for your submission.”

Click on the drop down box below the editor you were working in.

In the drop down box choose “*Whole Name*”. A merge token will appear in your editor that represents the field “*Whole Name*”.

Continue to create the Web Page/ Message you want the user to see, while inserting merge fields from your input form.

You can format the text just as you did in the previous field editors.

To spruce up your Confirmation Web Page, add a logo from the DataFormer Home Page.

Right Click on the DataFormer Logo from the home page

Click Copy

Go back to your Confirmation Editor

Move your text down a few spaces.

Right click in the new space above your text.

Click Paste.

Finally, Click Submit.

Email Confirmation

This is the Email that will be sent to the user immediately after a user of your form clicks the submit button. The Email can be a full color HTML email like the promotional emails you might have received from promoters. Again your email can contain merge fields with information pulled right from the input data the user submitted.

Let's create an email confirmation.

Click the “**Email Confirmation**” link.

From the drop down at the top labeled “Retrieve field in drop down that will contain email address.” Select *Email Address*. This is the field in the input form that contains the email address to send to.

In the Email Contents Editor type in “*Hello*”

Click on the drop down box below the editor you were working in.

In the drop down box choose *Whole Name*. A merge token will appear in your editor that represents the field *Whole Name*.

Continue to create the email message you want the user to see, while inserting merge fields from your input form.

You can format the text just as you did in the previous field editors.

Add the text “*Thanks for signing up for the DataFormer Users Conference.*” To the subject input box.

Add your email address “*you@yourdomain.com*” To the CC input box. So you get a copy of each email for your records.

Finally, Click Submit.

IV Preview

This area is simply where you can see the form as it will appear to the end user.

You can input data right here to fill your database and test the confirmations.

A link is displayed at the top of the form. This is the link you give out to customers or designers* that will use your new form.

*A designer can enhance your form if needed and still have all the backend features of the DataFormer DataBase. For example see <http://www.vts.com/formit/sampleflow.htm>

IV Data

This is where the data resides from users that have input data. There are 2 basic sections of the **Data Area**.

Data Repots - You can customize realtime reports to show all fields from your form or just certain fields that you or associates might want to see. All reports show a date stamp for each record and can be sorted by any field. You can copy the displayed information from any report into an excel spreadsheet on your computer to get an off-line copy.

Let's build a custom report.

Click on the button "Data Reports",

You will see a table labeled "Report Area".

The first item is labeled "Entire Data Base".

You would click this to see all your Data sorted by input data.

However, for now lets make a new report.

Click the link "[Or Click here to make new Report](#)"

You will be taken to the naming page for the new report.

Enter the text "Names & Emails" in the first box to Name this report.

Next in the second box for Heading One enter "*This report shows names and emails for Conference Registries*" as a description at top of report.

Skip Heading Two

Click Submit

In this page you will choose the fields from your input form you want displayed in your report.

Choose "Whole Name" and "Email Address" by checking their boxes. (If you see a field in orange this is the fields you selected as hidden for your eyes only)

Click the "**Add Fields to Report**" button.

This next page is where you change Column Headings for your fields to make the report more descriptive and clearer.

Change the **Whole Name** field to "Name" and **Email Address** to "Email". This will not change your form just this report.*

Click the Submit button

*You can change headings under **Report Edit – Up Date Column Headings**.

To run a report just click on it in the **Report Area** table. You can sort on any field in the report before reviewing the report.

Edit Delete Entries - This is where you edit and delete records that have been in-putted into the database of the form. This is very simple and should require no further instructions.