Getting *fancy* with WCMS forms

12/4/24

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Before we start

- I may have been overly ambitious with how much I can cover here, but the intent is to do a quick live demo for everything (or at least show a prebuilt working example)

- Please hold questions to the end so I can cover as much as possible (but please interrupt me if I'm going too fast to follow or not speaking loud enough)

- Slides will be available after the conference and everything has an accompanying blog post on the Building the Next WCMS website, linked on the slide

- Unfortunately, I had to cut the Mailchimp demo promised in the session description

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Create custom searches

- The search has to already exist, this is technically creating a custom search *form*

- The search must accept parameters in a query string (?key=value)

- Requires you to review a submitted search and determine which parts of the query string need to be replaced by tokens for form values

DEMO: creating a search form that searches blog posts with a specific blog tag

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Chat with Teams

- This uses Power Automate/Workflows – previously there was a "remote webhook" option in Teams that was simpler, but Microsoft has deprecated that

- The workflow does not directly support HTML, so the simplest implementation does not have line breaks or bolding, but if you are willing to put in extra effort you can make it happen by separating the data into "chunks"

- Microsoft "message cards" can do a lot, but the documentation can be hard to follow, or refer to features that are not supported by Teams

DEMO: posting to a Teams channel that a search has been performed

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Perform calculations

- Webforms have a calculation field that can do math based on user input

- When using optional fields in a calculation, you must provide a fallback value for when the field is left blank

- Can combine with remote fields to use data from an external dataset
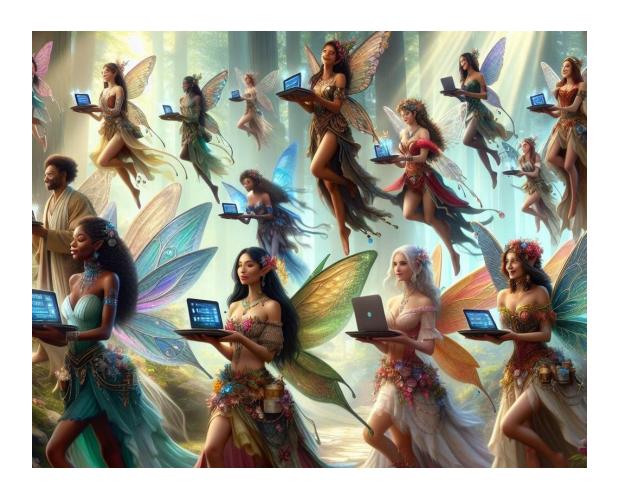
DEMO: creating a simple calculation

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Fetch remote data

- Works with public JSON feeds, or private feeds that can be accessed by including a token in the query string

- The data must be "top level", returning data in an array with information provided in key/value pairs

- One of the key/value pairs must be something where the value is unique for each item

- Can send additional parameters to filter results if the JSON endpoint supports it

DEMO: using a remote data source to pick a WCMS site

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Fill PDFs

- Webform's ability to populate a PDF can be handy if, for example. you have a process that still relies on paper forms, or maybe you need to provide the user with something that has a more designed look (maybe you expect them to print it and hang it up?)

- You must have a PDF with fields (or be able to create one)

- The appearance of the PDF is entirely up to the settings in the PDF

- PDFs should be properly tagged and accessible

- The process is not the most straightforward

DEMO: creating a certificate of completion

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Limit selection quantities

- You can have separate limits for each item in a field using radios, checkboxes, or select elements

- The number remaining can be shown or not, with customizable text

- When limits are reached, the item can be disabled, removed, or continue to work (allowing for a "wait list" scenario)

DEMO: appointment selector

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Get page-specific feedback

▪ When embedded into a page, webform submissions populate a "submitted to" column with the submission information, so you can use the same form on multiple pages without confusion as to where results came from

▪ This doesn't work in the site footer, but you can add hidden fields pre-populated with tokens for the page URL and/or title

▪ You can also use tokens to pass information from a simple form to a more complex one

DEMO: creating a "submit page feedback" button

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Little tips

Working with numbers

RELATED POST https://uwaterloo.ca/wcms3/forms-numbers

- It's not always best practice to use the numbers element for numbers input!

"For office use only" fields

RELATED POST https://uwaterloo.ca/wcms3/forms-office

- No more "please don't type here" – just make the field only available to people with results access

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Play rock paper scissors

- Tokens can generate a random number from 0 to 2,147,483,647, which can be put in a hidden field

- Conditionals can be used to hide other fields depending on what range that number is in (divide by the number of random items you have to determine how many numbers should be in that range)

- Conditionals don't support "or" options so must have separate fields for each outcome

DEMO: rock paper scissors!

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Choose your own adventure

Webforms can do a lot more than I've covered here. What you do with them is up to you! (Just remember not to use them to collect confidential data!)

Any questions?

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