

Website Builder in Craft CMS

Editor Guide

Authored by: Rebecca Woolfrey & Kristin Bittner, WPSU

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Learn to organize and create content in Website Builder, brought to you by WPSU's Creative Services Multimedia Team.

Welcome to Website Builder

WPSU's Multimedia Team developed your website using the Craft Content Management System (CMS) and compatible plugins. Craft allows content developers to build pages and content quickly using a collection of content entry types and a variety of content format blocks. Using the admin user interface, clients have the option of managing their own content to update, add, or remove information.

Your site admin link:

Content Development

Craft CMS Terms

Control Panel

The backend administrative space within Website Builder.

Entries

Each entry holds content that will become a web page.

Singles

One-of-a-kind pages, such as a homepage.

Channels

Streaming content, such as events or news. Think of these as mini-databases. These are tied to the Categories. Before you can have a channel, you need a category. Anything in a channel is “portable” across the site in different ways. One place to edit, multiple places where it can display.

Structures

Visual organization of entries.

Ad Hoc Pages

One-off pages that don't really “fit” in your overall site organization, could be used for special announcements, a temporary event page, etc.

Pages

Your website content pages laid out in a hierarchy in which they appear on the site. The top navigation is built from how the pages are structured here.

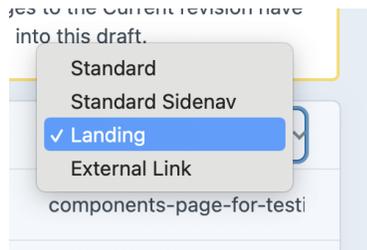


- Sorts the list of entries by structure or by other categories.
- Expand/collapse descendants in the list.

Entries

Entry types

You can select different types of entries, depending on the function or look your page requires.



Standard

Basic content entry using the Content Builder blocks.

Standard Sidenav

Basic content entry using the Content Builder blocks with a navigational menu to the right side of the content. This sidenav is populated with links to sub-pages.

Landing

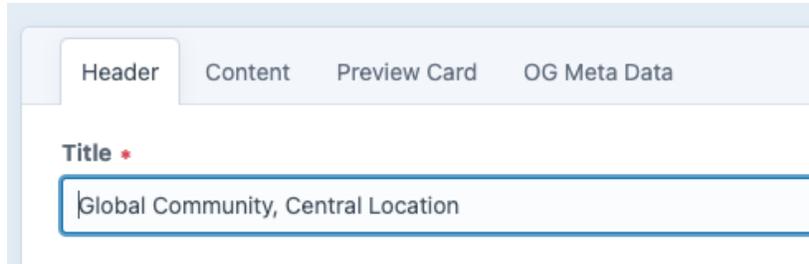
Landing pages are designed to achieve a specific goal, such as directing users to sign up, apply, or donate. Content should be selected with the goal and audience in mind. They are sometimes used for the first page of a website's main sections. This has a different template that allows background colors and other content blocks to display at full page width.

External Link

This allows you to have an item in your menu that goes to an external link.

Content Builder Tabs

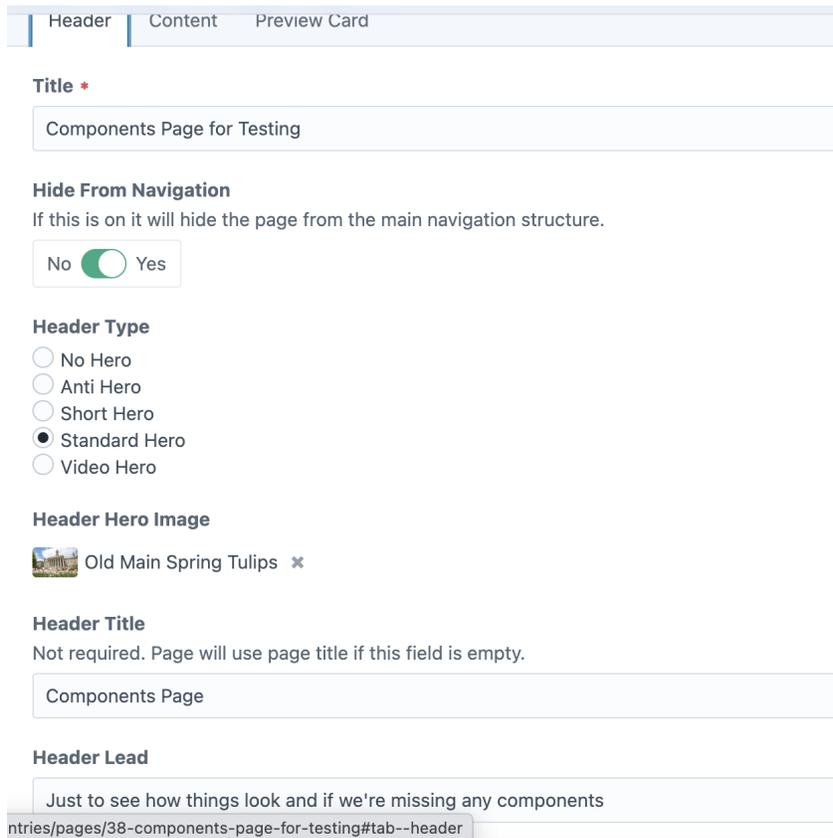
Standard, Standard Sidenav, and Landing pages have Content Builder tabs.



The screenshot shows a horizontal tabbed interface with four tabs: 'Header', 'Content', 'Preview Card', and 'OG Meta Data'. The 'Header' tab is selected and highlighted. Below the tabs, there is a 'Title *' label followed by a text input field containing the text 'Global Community, Central Location'.

Header Tab

This has to do with the top of the web page, just beneath the main navigational menu.



The screenshot displays the configuration form for the 'Header Tab'. It includes the following sections:

- Header Tab**: A tabbed interface with 'Header', 'Content', and 'Preview Card' tabs. The 'Header' tab is selected.
- Title ***: A text input field containing 'Components Page for Testing'.
- Hide From Navigation**: A section with the instruction 'If this is on it will hide the page from the main navigation structure.' and a toggle switch set to 'Yes'.
- Header Type**: A list of radio button options: 'No Hero', 'Anti Hero', 'Short Hero', 'Standard Hero' (selected), and 'Video Hero'.
- Header Hero Image**: A section with a small image icon and the text 'Old Main Spring Tulips' followed by a close button (x).
- Header Title**: A section with the instruction 'Not required. Page will use page title if this field is empty.' and a text input field containing 'Components Page'.
- Header Lead**: A text input field containing 'Just to see how things look and if we're missing any components'.

At the bottom of the form, a URL is visible: `entries/pages/38-components-page-for-testing#tab--header`.

Title

How you recognize this page on the administrative console (backend). This can be the same as how the page is recognized to the website visitor (frontend).

Hide From Navigation

Option to remove this page from the navigation menus, but still allow it to be accessed via links, buttons, etc.

Header Type

Options for styling the top of the page.

No Hero

No color, texture, or image will appear at the top of the page; the page will start with the header title.

Anti-Hero

A color with texture will appear behind the header title. You can select the color and texture combination you would like to use from a list of options.

Short Hero

A narrow band of your image will appear at the top of the page; header title will appear below the image.

Standard Hero

A wide band of your image will appear at the top of the page; the header title and lead text will appear on top of the image.

Video Hero

Same as Standard Hero, but with video instead of a still image.

Header Hero Image

The image you would like to use for Short or Standard Hero.

Header Title

The title of the page you want the frontend viewer to see (if the backend title is the same, you can leave this blank, and it will automatically use the information entered in "Title").

Header Lead

Optional subtitle for your page.

Content Tab

Content Builder - all the options within Content Builder are described below.

Preview Card

Preview cards are generated on parent pages and serve as links to lower-level pages. In order to use Preview Cards on the parent page, you need to set up the Preview Card information for the lower-level pages first. You do this on the “Preview Card” tab. You must include an image to represent this page and you can optionally include text to accompany the image.

Components Page for Testing

Current — Edited ▾

Header Content **Preview Card**

Preview Image

+ Add an asset

Preview Text

To display these images and information, you can add a “Preview Cards Autogenerated” content block on the parent page.

This is what preview cards look like:



Global Community, Central Location

State College is a vibrant college town surrounded by natural beauty with the amenities of an urban environment.



Flexible Degree Options

No matter your interests, you can build a degree that fits your academic and career goals.



Elite Faculty

Work with distinguished scholars at a major research university.

OG Meta Data

This is optional and not needed for every page, but we recommend you customize this for primary landing pages. Browser logic will pull something from the page if nothing is specified here.

Home Page Current ▾

Hero Hero Images Content OG Meta Data

OG Description
Add this if you want specific OG sharing text to be used. Otherwise, social platform will automatically attempt to pull text from the content.

The Penn State School of International Affairs is an interdisciplinary program that prepares exceptiona

OG Social Media Sharing Image
As of August 2021, suggest size is 1200 x 630 px

 Penn state sia og flags 1200x630 ✕

If you do not add a custom image, this is what displays by default (for example):



Content Builder Blocks

Elements of content that can be added to entries in the **Content Builder**.

Text

Rich text and HTML editing capabilities with limited styling in the editor. Can be used to create paragraphs of text, lists, tables, headings, and more.

Accordion

This feature appears as a compact list, but each section can be expanded to reveal additional information. Each “row” receives a Header, which is the portion visible when the box is collapsed, and Text that is exposed when the box is expanded. The header does not allow rich text editing, while the text field does. Create and reorder as many rows as needed. No styling controls are available within Content Builder for this Block type.

Optional Concentrations	+
Core Curriculum	–
The core curriculum includes 18 credits—six courses of 3 credits each—that are completed during your first year in the program.	
Electives	+
Capstone Experience	+
Language Proficiency	+

Blockquote Blocks

Blockquote

This is designed for quotes with images and pull quotes. Rich text and HTML are available for the Quote portion, while the Attribution and Attribution Title fields are standard text.

Content Builder

Blockquote

Quote

<> ¶ B / ☰ ∞ 🖼️ ↶ 🗑️

Attribution

Attribution Title

Attribution Image

Small square cropped image. Not required. If no image is added, a blue shield/quote mark will be displayed.

+ Add an asset 📁 Upload a file

An example of a quote with attribution and an image:



"My favorite thing about being here is the students and how there are so many different viewpoints, people from different backgrounds, come from around the world."

Will Bame '24

Testimonial - Single*

A variation on a blockquote with some additional styling.



"Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean ullamcorper mauris eget tortor porttitor tristique. In a ultricies eros, ac molestie lorem."

Person Quoted, Declarer of Quotations

*not available for all sites

Testimonial - Channel

Variation of a Blockquote but in a channel, display at random from a list of entries.

“The School of International Affairs will take you to the next level of your career. With smaller class sizes, professors are willing to get to know you on an individual level and you'll become a member of the SIA family here in Happy Valley and around the world.”



Tony Hudson, Foreign Service Officer at U.S. Department of State,
Class of 2019, United States

Button Blocks

Buttons serve as links to other places. The button text is what the user will see displayed on the button. You can select where the button takes the user. “Entry” is another location within your site, “Asset” links to a file, document, or image you’ve uploaded. And “URL” will take a user to an online location outside of your site.

Button

These buttons work well placed below other content. You can select whether to use the Primary or Secondary color in your theme.

Penn State Values

The Penn State Values, a statement of core values for the University, was developed over a four year process. The Values represent our core ethical aspirations for all our daily activities and actions as students, faculty, staff, and volunteers at Penn State.

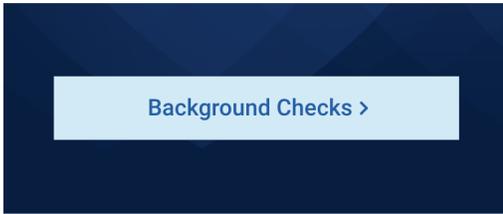
[Penn State Values >](#)

You can add multiple buttons in a row, like this:



Button with Shield

This style of button allows your button to take up more space, visually, on the webpage. You can create a series of these buttons to tile across the page.



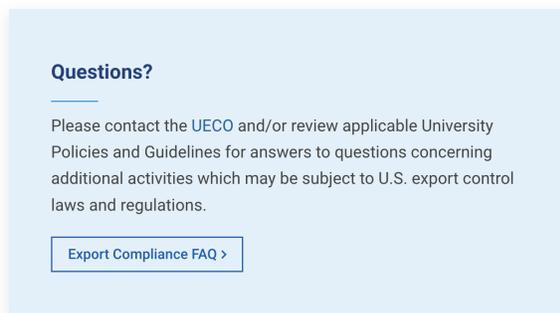
Button - Call to Action

This button type allows you to enter descriptive text above the actual button.



Callout

This feature allows you to bring attention to a small amount of text and gives you the option to provide a linked button to additional content. Styling options include Note (Blue), Warning (Yellow), and Alert (Red).



Contact

This feature allows you to provide contact information for an individual user in your system and/or contact information for an Office or Unit.

More Information



Grant Littke

Director of Career Services

gbl3@psu.edu
(814) 865-3809

Directory

Directory blocks allow you to display users in alphabetical order by last name. You can set up the directory so that you're only showing certain categories of employees for one type.

Learn more about setting up the directory below, in Users.

SIA Faculty



Larry Catá Backer

Professor of Law and
International Affairs

lcb11@psu.edu
814-863-3640



Eleanor Brown

Senior Scientist, Rock Ethics
Institute

eub226@psu.edu
814-867-0399



Johannes W. Fedderke

Professor of International
Affairs and African Studies



Gordon Gray

Professor of Practice

gjg5413@psu.edu

Document - Download

If you add documents to the Documents Channel, you can then use the “Related Document” content block to generate a link with a file icon to signal to users that the link takes them to a related document.

Export Compliance Plan

The development of a written compliance plan is a foundational step for an effective export compliance program. The Pennsylvania University has prepared an Export Compliance Program document ("ECP") that outlines the University's understanding of the impact of U.S. export control laws on the operations of an academic research institution like the University. The ECP has links to relevant forms, materials, government and private guidance documents, and other background information. The ECP also links internal University policies, procedures, and practices that have been implemented to facilitate institutional compliance with U.S. export control laws and regulations.



Forms

After creating a form in the Formie plug-in on the Control Panel, you can add it to a page with this content block. *Learn more about Formie below.*

"Add Form Above" in Content Builder.

Enter the title of the form as you want it to appear to front-end users. You can leave this blank if you do not need to give your form a title or if you're styling your title in a separate text block.

+ Add a Form – select the form you created in Formie

On landing pages, you can opt to style the background area with different colors. You can opt to remove bottom padding.

The screenshot shows the 'Content Builder' interface. On the left is a configuration panel with the following options:

- Forms
- Form Title**
Conference Registration
- Form Select**
demo form ✕
- Content Area Background**
 - White
 - Light Blue
 - Light Gray
 - Light Gradient
- Remove Bottom Padding**
Use when stacking a content block

The form preview on the right contains the following text and fields:

For general questions and information about Penn State, [contact Penn State online](#) or call 814-865-4700.

First Name * Last Name *

Email Address *

Message

Image

Although Craft CMS Course Platform will allow you to upload multiple images, it will only display one image. Every image must have alt text for accessibility compliance, so that a screen reader can describe the image to learners with visual impairments. Image

captions are optional and cannot be styled within Content Builder. Style options available: image alignment and column span.

Image Gallery

The Photo Gallery block supports three images across. You can add more than three images, but it might look unbalanced if you do not have a multiple of three. To have a uniform appearance, images here would be identical sizes or ratios *prior* to upload and captions would be similar length. For a staggered look, like the example below, you can add images of assorted dimensions.



In-line Widget

Using this advanced user feature, you can insert or embed <iframe> and other javascript elements, such as a google map or other third party element into your webpage.

Inline Widget Test



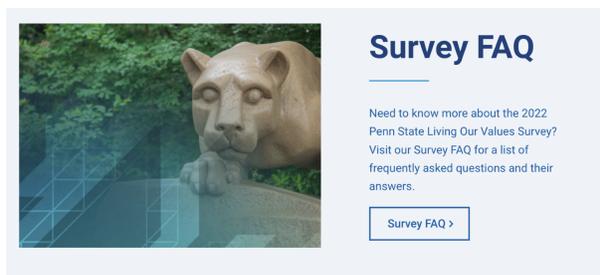
Logo Grid

Often used when featuring several different organizations related to a page or event.



Preview - Offset

A way to feature information on your pages. Image and text create a brief preview of more extensive content, often accessed through the CTA link provided. You can include an image to the right or left of the text. You can supply a title, body, and a linked button.



Preview Cards Autogenerated

This block can be enabled to show preview cards for children/descendant pages IF those pages have been loaded with preview images and/or text.

		
Export Compliance Enforcing, implementing, and developing University policies, procedures, and guidelines designed to facilitate compliance with U.S. Export Compliance Laws and Regulations.	Title IX Addressing Title IX reports involving students, as well as other reports of student and employee sexual misconduct otherwise prohibited by University policy.	Data Privacy Ensuring compliance of University policies that protect the private information of students, faculty, and staff.

Read More Toggle

This block type creates a short link to additional content. This is useful for providing users/learners with additional details or sources that may not need prime real estate in the course pages. The content behind the “Read More” link is added to the “Read More Content” field, which has a rich text editor. The short, descriptive text that prompts the learner to click and access the hidden content is added to the “Read More Link Text” field. It is also possible to specify a character maximum, which allows for a portion of the main text to be visible before a “Read More” link appears. No styling controls are available within Content Builder for this Block type.

Title IX Information for Parents and Guardians

All Penn State youth programs have policies in place to ensure the safety of youth participating in our programs, activities and services is not compromised. All program staff are trained in emergency protocols and all relevant internal, external, and parental reporting requirements.

[Title IX](#) prohibits sex discrimination (including sexual harassment and/or sexual abuse) against Youth Participants in any of the University's education programs or activities, including recreational and/or athletic programs or services operated by the University.

[Report an incident](#) +

Quick Facts

The Quick Facts block was developed to display numerical and textual data for users to quickly gain an overview of some basic statistics related to your page.

This block type allows values and text to be presented to learners in a stylized table. Numerical values, keyboard symbols, or text can be added to either the Value or Text fields. The row pairs of Values/Text can be reordered, but there are no other style options available within Content Builder for this block type, but it is automatically styled differently on Landing pages compared to content pages.

Landing page styling example:



Content page styling example:

50

Some things

1000

Of something else

10M

Lots of this

Table

For accessibility purposes, tables should be reserved for tabular data. This can only make a simple accessible table with column headers. More complex cases that require row headers should be hand-coded in a Text Block. This table creator also can't add a caption, so please precede a table with a header that describes the table contents.

Employment Status	% of Placed Students
Employed Full Time	87.2%
Seeking full-time employment	7.7%
Full-time volunteer/service program	2.6%
Further education	2.6%
Not seeking employment or education	0%

Tweet

When you want to include a specific tweet on your page. Use judiciously, as this pulls a lot of resources and can reduce your site's performance.

Penn State School of International Affairs
@PennStateSIA · [Follow](#)

.@AlHurraNews interviewed @PennStateSIA Professor of Practice @AmbGordonGray about President Biden's July 13-16 visit to #Israel and #SaudiArabia. Check it out here: arbne.ws/3uWHmyg #WeAre



12:13 PM · Jul 18, 2022

1 [Reply](#) [Copy link](#)

[Read more on Twitter](#)

Video Embed

Select a hosting service (YouTube, Vimeo, or Self) and provide a Video ID for YouTube or Vimeo sources (The video ID is the unique portion of a video's URL). If self-hosting, upload a video file or use an existing video asset. Optional rich text editing field for the video transcript. Style options include video alignment and column span.

Hard Coded Content Blocks

Instead of using Content Builder Blocks, some content types are hard coded into your website pages. For example, Events and News are both hard coded into the Home page.

Events

Displays events from your events channel.

Events

[More Events](#)

OCT
27



DC Career Exposure Trip and Alumni Reception 2022

Date & Time: October 27, 2022 from 12:00 AM- 12:00 AM
Location: Washington, D.C.

Online Admissions Info Session

Date & Time: November 07, 2022 from 01:00 PM- 02:00 PM

SIA Fall Coffee Chats featuring Visiting Assistant Professor Mumbi Kimani

Date & Time: November 10, 2022 from 01:00 PM- 02:00 PM
Location: Katz 249

News

Display of posts from your news channel.

SIA News

[More News](#)



July 29, 2022

Professor Jett on why decades of recruiting women peacekeepers has had little effect



July 29, 2022

Ambassador Gray quoted in article about U.S. policy toward Tunisia



July 25, 2022

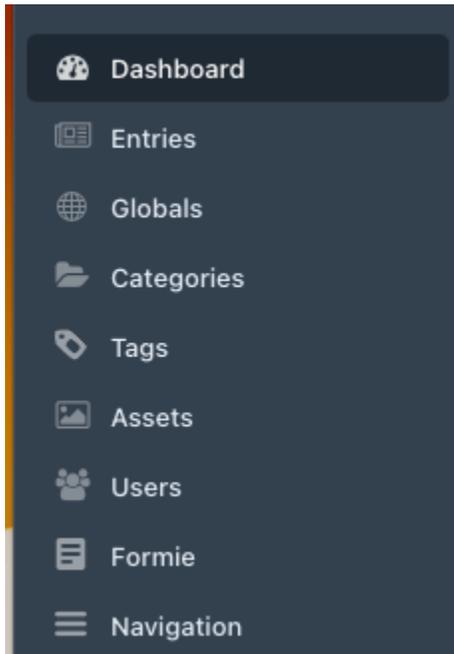
BBC News interviewed Ambassador Gray about Tunisia's draft constitution



July 25, 2022

Ambassador Gray quoted in New York Times article about constitutional referendum

Other Components on the Control Panel



Editor Control Panel

Globals

Globals are site elements that are on every page.

Social Media Links

Select your media and provide your URL. If you do not put anything here, this area will not display in the More menu.

Header Alert

When enabled, this will appear at the top of your site. This is usually reserved for critical information that you want users to see immediately. Examples: Covid alerts.

Header CTAs

These are the links you want your users to click the most.

Footer General Contact

Information about your organization at the bottom of the page.

Site Theme

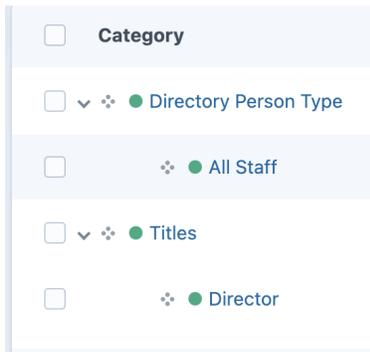
When theme options are available, this is where you can select them.

Tracking Codes

This is where you can include Google Analytics, Facebook Pixels, etc.

Categories

Categories are used to classify channel entry data and make it possible to place blocks of data (people, testimonials, etc) on a page. Categories are how you can put different people or pages into “folders” so you can then apply an entire folder to a page if needed.



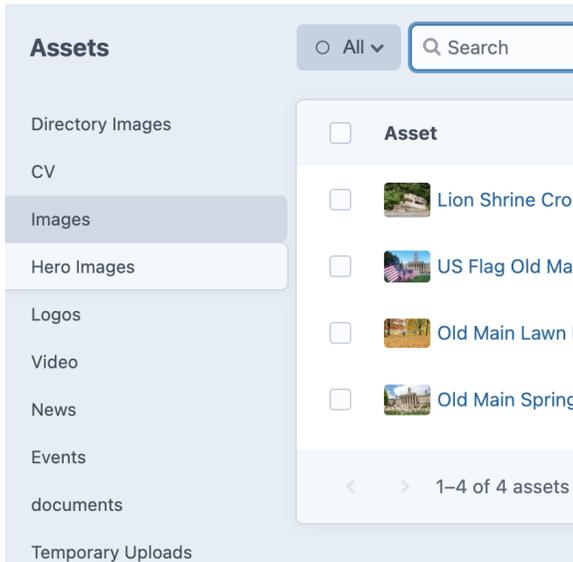
Tags

A method of categorizing information and content. This is probably going to go away because we are using categories instead.

Assets

Library of all the assets the site has, all the documents, events, images, etc.

Add, delete, and sort these elements into different “boxes” to help keep your site organized and well-maintained.

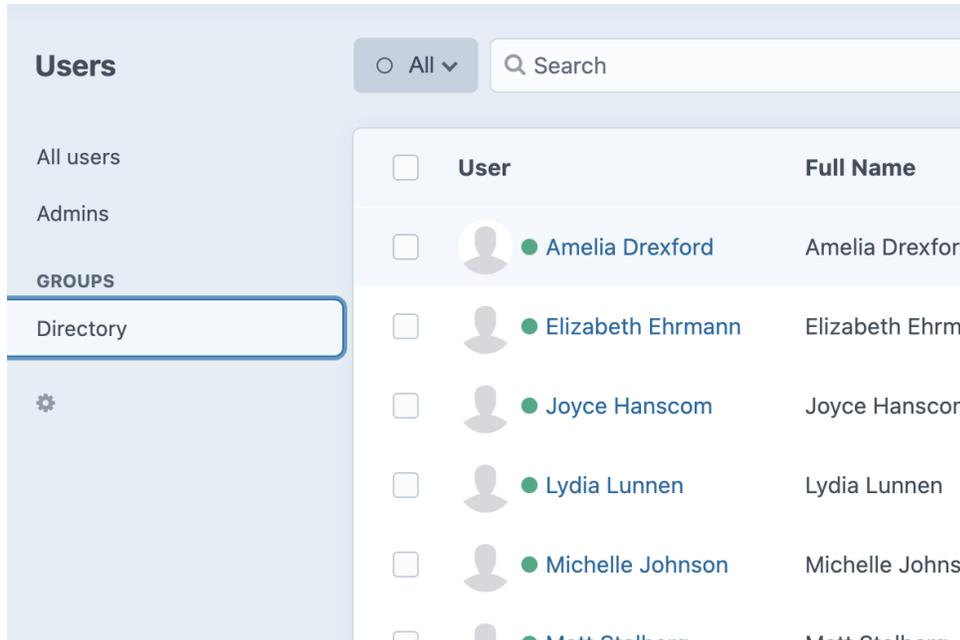


Users

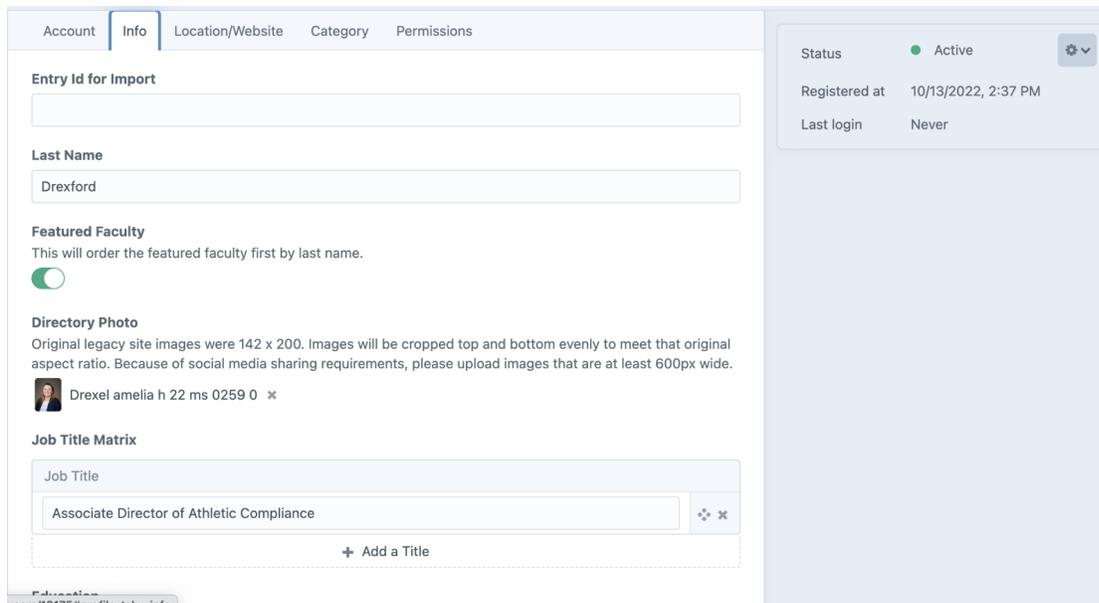
A list of all the people featured on the site (as listed in the directory) as well as any site administrators from WPSU and from your organization. Your organization's Admins are listed in the "Editors" group.

If you need different levels of access, we can create additional groups. Say, if you have a grad student you want to be able to enter events, but don't want them to go live until they're approved.

You can manually add users or have our developers perform an import for a large quantity of users.



When manually adding users, you can supply information about each user, including their job title, directory photo (which needs to exist in Assets *before* you can add the photo to the user).



To have your user display in the directory and be associated with any subcategories (specific departments or work units), you need to specify their department. This needs to be mapped to categories created in Settings to be understood by the Website Builder.

Account Info Location/Website **Category** Permissions

Department

- Directory Person Type x
- All Staff x

+ Add a category

PSU Account ID

You also need to enable “Directory” in the Permissions section. If you wanted a user to operate as an Admin or Editor, you could select that permission here as well.

Account Info Location/Website Category **Permissions**

User Groups

- Directory

Formie

User-friendly plugin for Craft, where you can make and edit forms, like you might use for contact lead captures or registrations.

Full feature tour is available here:

<https://verbb.io/craft-plugins/formie/docs/feature-tour/forms>

To create a new form:

Start in **Formie > Forms**. Click **+ New Form**.

1. Give your form a **name** as it will appear in the control panel (not the user view).
2. To spare yourself a bit of work, you may want to choose a **stencil** if there is one available for the type of form you're creating, such as a Contact form. If you are creating a more unique form, you can start with Blank Form.

Fields

This section of Formie's Form Builder is where you enter "fields" to collect specific information from users. You can drag and drop fields from the right side of the screen into the left panel. The order you place the fields is the order they will appear to the user.

If your form is very long, you can break it into multiple pages. Click the gear icon to the right of "Page 1" in Fields.

Time-Saving Tips:

- *You can "**Clone**" fields if you want to make similar fields, with similar settings.*
- *You can reuse fields from other forms you've already made on your site by clicking "**+ Add Existing Fields**."*
- *Plan your form before you begin building it in Formie to reduce the decision-making fatigue you might experience if you make those choices as you go within Formie.*

The **field types** have unique icons, which helps you identify what type of field you have constructed.

Some fields seem very similar, but may have special settings and using the different fields has significance when you are later constructing email notifications, which leverage the use of these field names (handles) to pull that variable data into custom email notifications. (See more about email notifications below). That is one benefit to using the specific Phone, Email, Name fields rather than just using Single-line Text for all three.

Field Settings

Each field type has **settings** that often include:

Label

What your field is about. This is required.

Placeholder Text

An example for the user about the type and format of the information they should enter. Placeholder Text does not get submitted.

Required

Select this to force users to complete this field

Pre-Populate Value

This is different from the placeholder text because this information *will* get submitted. This feature is used when forms are programmed to pull data from elsewhere that auto-populates the forms. (Editors should generally ignore this.)

Appearance

Allows you to change some of the label visibility and position. Consult WCAG 2.1 to ensure your form remains accessible to all users.

Instructions

A space to provide your users with complete instructions for completing this portion of the form.

Match Field

When you want to validate the data for that field (numerical, password, email, etc.).

Advanced & Conditions

These are powerful, but more advanced features. Visit Formie's documentation for more details.

- [Conditions](#)

Common Fields:

Single-line Text

User can enter one line of text (ex: *Department*).

Multi-line Text

User can enter much longer text (*ex: Special Requests*).

Radio Buttons

User can select one option.

Checkboxes

User can select multiple options (you can limit how many).

Dropdown

User can select one option from a list of choices.

Number

Captures numerical input; you can limit possible numbers to a range, and you can allow decimal points.

Name

Works similarly to single-line text, except that it has the special option of allowing for multiple name components (first, middle, last, etc.) to be captured at once. As with any of these fields, data captured here can later be used in email notification variables.

Email Address

Can include validation and uniqueness rules to ensure that real emails are being entered and that the form is not being duplicated by the user.

Phone Number

Allows for addition of country code dropdown.

Agree

Checkbox that the user can select to accept something (entered as text). Set the value when checked/unchecked.

Advanced Fields:**Date/Time**

Choose date, time, or both. Choose how the user inputs the date/time information. You can also choose to display "Today's Date" or a specific date by default. You can set date range parameters and specify the appearance of date and time format.

File Upload

This allows the user to upload a file. You can specify file types and sizes and the file path.

Hidden Field

This can be used when you want to collect data about the user completing the form (like a timestamp, IP address, or referring links), but you don't want that to be visible to the user.

Table

For collecting user-input tabular data. For example, on a conference registration form, a user could choose five sessions from a drop-down list of 20 and then rank their preferences 1-5. Or a user could list favorite movies, rating, and the year they premiered for a survey.

HTML

Would allow you to embed something, like a video, audio, or link.

Password

Allows password entry (usually not used for our work).

Calculations

Used to do math or logic using data in the form. Number of Guests x \$100 = total cost of invoice. This could be hidden on the front-end, but revealed to users in an email notification, for example.

Address

Similar to the Name field in that you can specify components to include in the address collection. You can require some and not others.

Recipients

Can choose who this form should be submitted via email (eg: if you want your feedback to go WPSU Radio team vs. WPSU TV team.) These emails are protected from bot scraping.

Repeater

A formatting piece; put a field element inside of this to allow the user to add more than one (for instance names of people attending when that number varies.)

Group

A formatting piece that allows you to group fields. If you're collecting information about the participant and their emergency contacts, grouping could help clarify whose phone number you want in which field.

Section

Formatting that allows you to make a visual linear separation on the form. Select the width, color, and style (solid/dashed) of the line

Heading

Formatting (give a section a heading)

Summary

A field that shows a summary of all submission values to the user. Commonly used on the last page of a multi-page form.

Signature

Signature with mouse or finger; choose pen weight and colors for the background and the pen. Saved as an image.

Element Fields**Entries**

Users can select from entries that were set up prior to form building within your Craft Control Panel.

Categories

Users can select from categories that were set up prior to form building within your Craft Control Panel and might include directory elements, for example (faculty, staff, etc.).

Tags

Users can select or create tag elements.

Users

Users can select users (from users you added to this Craft site)

Predefined Field Options

For Dropdown, Checkboxes and Radio Buttons, Formie provides a collection of preset options for common scenarios for you to pick from. This might be useful to quickly populate an entire Dropdown with a list.

You can also select what content to use for the Label and Value of each option. For instance, you might like to label the option as Australia, but have the value as the abbreviated "AU".

Preset Collections: Countries, States (Canada), States (USA), Continents, Days, Months, Currencies, Languages, Industry, Education, Employment, Marital Status, Age, Gender, Size, Acceptability, Comparison, Difficulty, How Long, Importance, Satisfaction, Would You.

Form Construction in Formie:

Fields Appearance Behaviour Email Notifications Integrations Settings

PAGE 1

First Name

First Name Last Name

Email address

mcurie@psu.edu

Phone Number

814-555-5555

Department

Physics

Role

Faculty or Staff

Events Attending

Keynote Speaker Luncheon
 Conference Dinner
 Awards Brunch

Select Your Dinner Option

Steak
 Fish
 Pasta

Number of Guests

1

Any Special Requests?

Refund Policy

I understand that refunds are permitted up to three weeks before the Conference and requests must be submitted via email to the conference coordinator coord@psu.edu.

Submit

EXISTING FIELDS

+ Add existing fields

COMMON FIELDS

Single-line Text Multi-line Text

Radio Buttons Checkboxes

Dropdown Number

Name Email Address

Phone Number Agree

ADVANCED FIELDS

Date/Time Address

File Upload Recipients

Hidden Field Repeater

Table Group

Heading Section

HTML Summary

Password Signature

Calculations

ELEMENT FIELDS

Entries Categories

Tags Users

Same Form, Viewed on Website:

Conference Registration

First Name

First Name

Last Name

Email address

Phone Number

Department

Role

Events Attending

- Keynote Speaker Luncheon
- Conference Dinner
- Awards Brunch

Select Your Dinner Option

- Steak
- Fish
- Pasta

Number of Guests

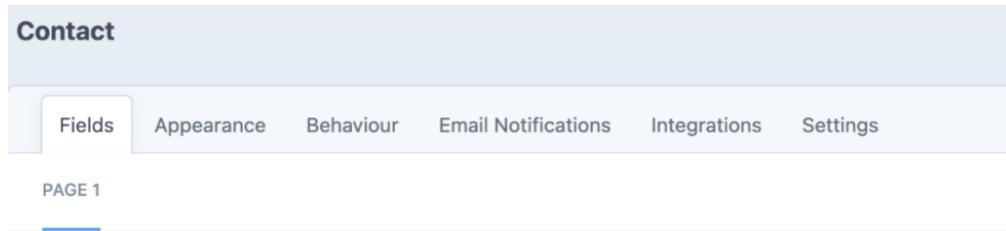
Any Special Requests?

- I understand that refunds are permitted up to three weeks before the Conference and requests must be submitted via email to the conference coordinator coord@psu.edu.

Submit

Other Tabs

While the “Fields” tab is where you’ll do most of the form-building, you will also need to visit some of the other tabs in the Formie Form Builder.



Appearance

Set up the overall look of your form, including form title visibility, page progress (when the form is multi-paged), and the positions of labels and instructions throughout the entire form.

Behaviour

Set up what happens when the user submits the form, including: submission method, validation, and messages and indicators to the user that the form has been submitted or has encountered an error.

Email Notifications

Email notifications perform two important functions:

1. Notify the user their form has been received.
2. Notify admins that a form has been submitted.

You can create as many notifications as you need for each form, so if many people are managing an event, say, you can have the form be sent to a bevy of different email addresses.

You choose exactly what content forms the subject and body of the notification, entering your own words and incorporating variable fields from the form.

Contact

Fields Appearance Behaviour **Email Notifications** Integrations Settings

Name	Subject
● Send Notification to User	Confirmation Receipt
● {formName} Submission	{formName} Submission

+ New Notification ▼

Email Notification fields:

- **Enabled** - Whether the notification should be sent.
- **Name** - An internal name to call this notification in the control panel.
- **Recipients** - Define who should receive the email notification and set emails or conditions.
- **Recipient Emails** - A list of email addresses that this notification should go to.
- **Recipient Conditions** - Conditional logic to determine which email addresses receive the notification.
- **Subject** - The subject line for the email.
- **Email Content** - The full body of the email. You can use variable fields to set up the email so that it inserts information like each user's first name into the message.
- **From Name** - Set the name attribute that the email is shown to have come from. The name or entity you want users to see as the sender in their inbox.
- **From Email** - The sender's email address.
- **Reply-To Email** - The reply-to email address for the email. The email address(es) you want replies to be sent, such as a team or individual involved with the form.
- **CC** - The cc email address for the email.
- **BCC** - The bcc email address for the email.
- **Attach File Uploads** - Whether to attach any user-uploaded files to the email.

- **Email Template** - To select a custom Email Template – a wrapper developed with organization branding and rigorously browser tested.
- **Attach PDF Template** - Whether to attach a PDF template to this email notification.
- **PDF Template** - To select a custom PDF Template, such as might be the case for an invoice, shipping label, or tickets.

Integrations

Integrations allow the form to work with other technology. One type of integration is Captcha, which distinguishes human from machine input and helps eliminate spamming through form submission.

Settings

Additional advanced settings, that have to do with programming and data collection and management.

FORM BUILDING FINAL STEPS

- Add to a page in Entries > Content Builder.
- **Thoroughly TEST your form and notifications.**

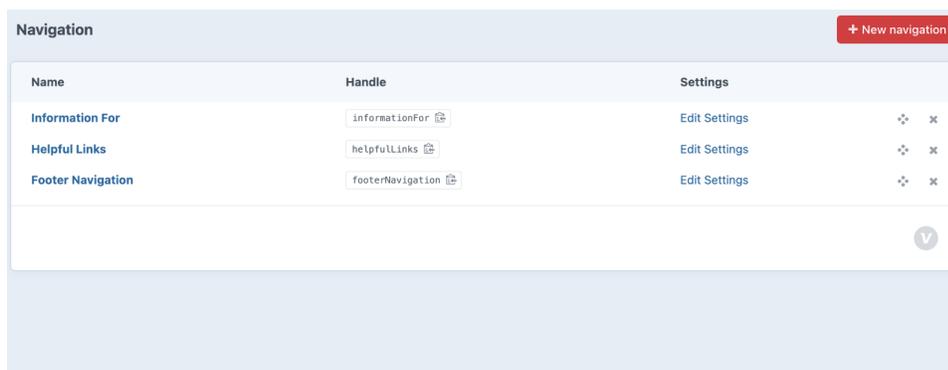
Navigation

The section of the Control Panel controls what information is within menus outside of the main navigation menu.

The menus you are likely to see here are:

- Information For
- Helpful Links
- Footer Navigation

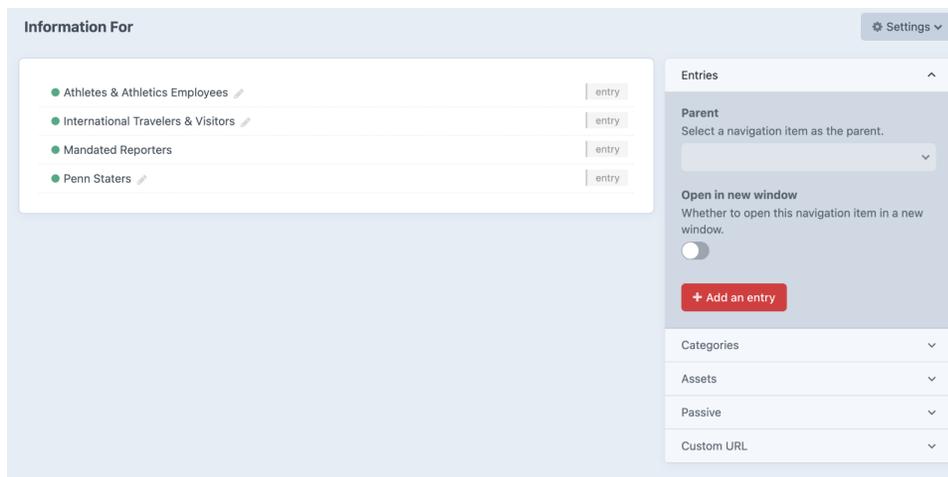
The first two (Information and Helpful) appear in the “More” menu, accessed from the top right of any page of your website. *(Note: Social Media icons also appear in the More menu, but they are controlled in the Globals section.)*



The screenshot shows a 'Navigation' control panel with a '+ New navigation' button in the top right. Below the header is a table with three columns: 'Name', 'Handle', and 'Settings'. The table lists three navigation items: 'Information For', 'Helpful Links', and 'Footer Navigation'. Each item has a blue name, a handle in a text box with a copy icon, and an 'Edit Settings' link with a gear icon and a close 'x' icon. A search icon is visible in the bottom right corner of the table area.

Name	Handle	Settings
Information For	informationFor	Edit Settings
Helpful Links	helpfulLinks	Edit Settings
Footer Navigation	footerNavigation	Edit Settings

You can specify what you want to include in these menus by clicking their blue name. You can include entries (pages), assets, and external or custom URLs. Order the items however you want. You can click the pencil or gear icon to edit the Title of the item as it will appear to visitors to the menu.



The screenshot shows the 'Information For' settings panel. On the left, there is a list of entries: 'Athletes & Athletics Employees', 'International Travelers & Visitors', 'Mandated Reporters', and 'Penn Staters', each with a pencil icon and an 'entry' label. On the right, there is a 'Settings' panel with a 'Settings' button in the top right. The 'Entries' section has a dropdown arrow. Below it, the 'Parent' section has a dropdown menu with the text 'Select a navigation item as the parent.' The 'Open in new window' section has a toggle switch. At the bottom of the settings panel, there is a '+ Add an entry' button and four dropdown menus labeled 'Categories', 'Assets', 'Passive', and 'Custom URL'.