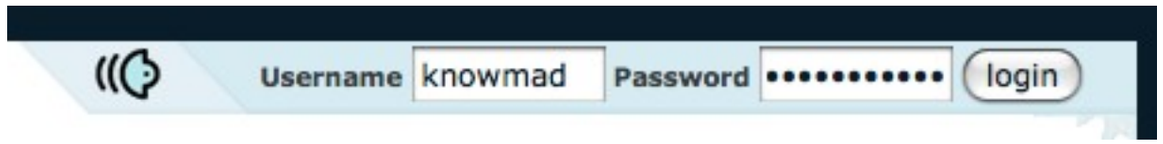
Extreme Forms

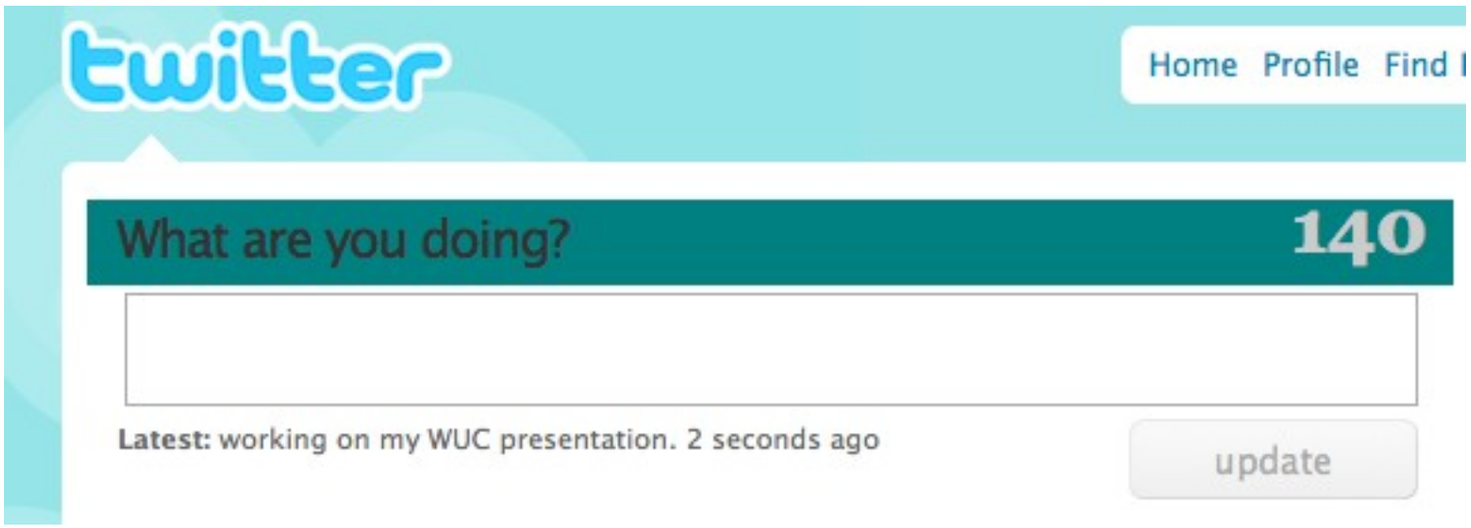
William McKee
william@knowmad.com

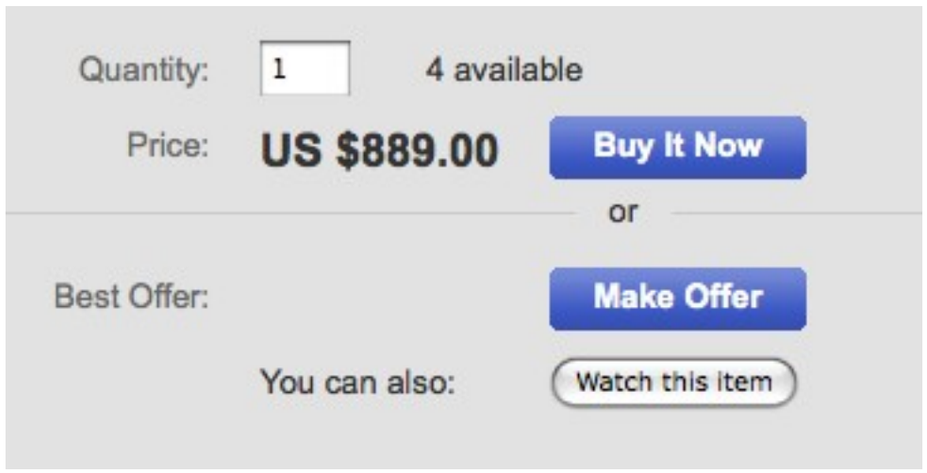
WebGUI Users Conference 2009

KNOWMAD TECHNOLOGIES

Forms are everywhere.







KNOWMAD TECHNOLOGIES

Forms make user interaction possible.

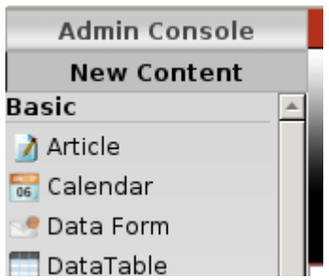
KNOWMAD TECHNOLOGIES

WebGUI makes forms easy!

KNOWMAD TECHNOLOGIES

Building a Form

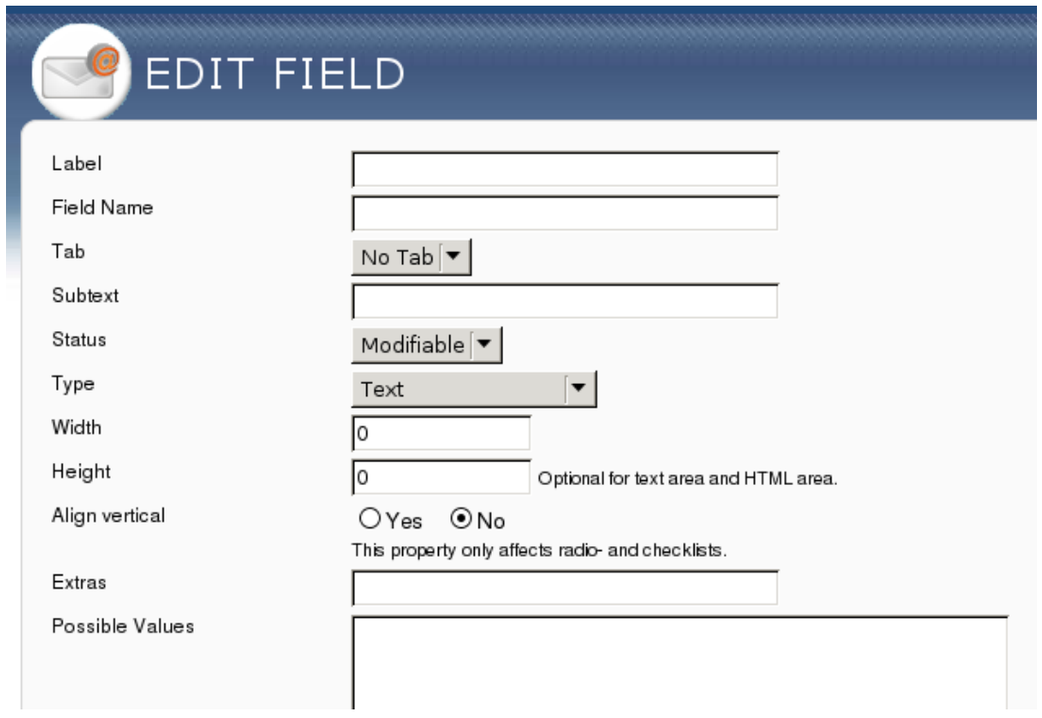
1. Add a Data Form



2. Define Your Form

3. Add a Field

4. Define Your Field



5. Repeat!

KNOWMAD TECHNOLOGIES

How can I make **better** forms in WebGUI?

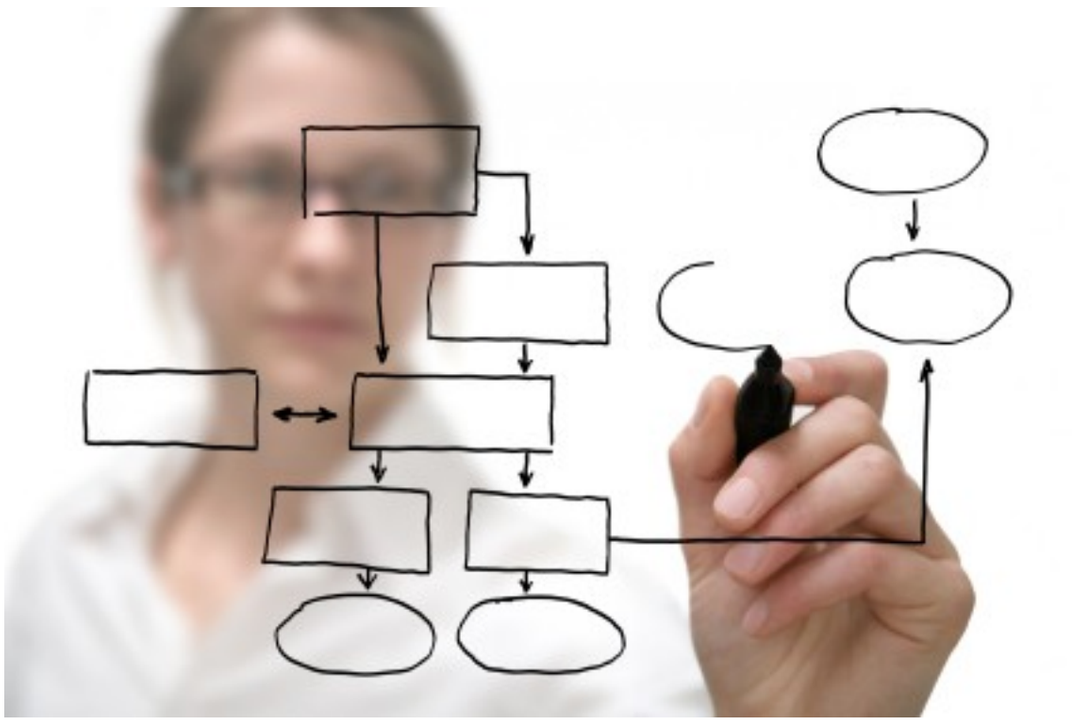
Start with good planning.

Use good markup.

Add **useful** interactive feedback.

KNOWMAD TECHNOLOGIES

Plan Your Form



Start with paper – draw out the form or use existing paper documents

Be Brief – only require necessary fields. Consider your audience.

Prepare Responses – error messages, HTML reply, email notification.

KNOWMAD TECHNOLOGIES

Use good form markup.

Form Elements allow the user to enter information.

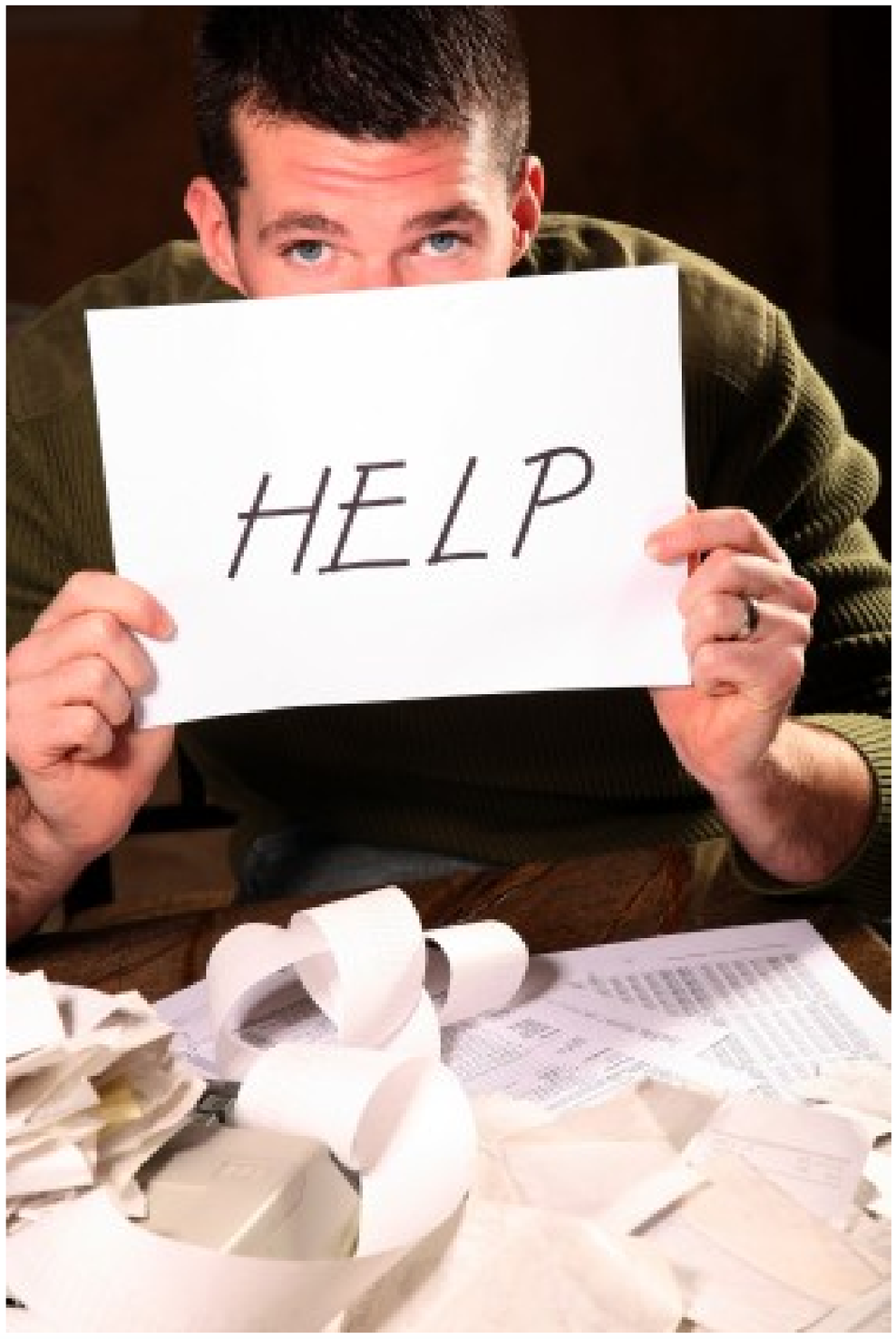
Labels describe fields.

Fieldsets group related fields.

Legends provide a title for fieldsets.

See Resources for template with proper form markup.

Interactive Feedback

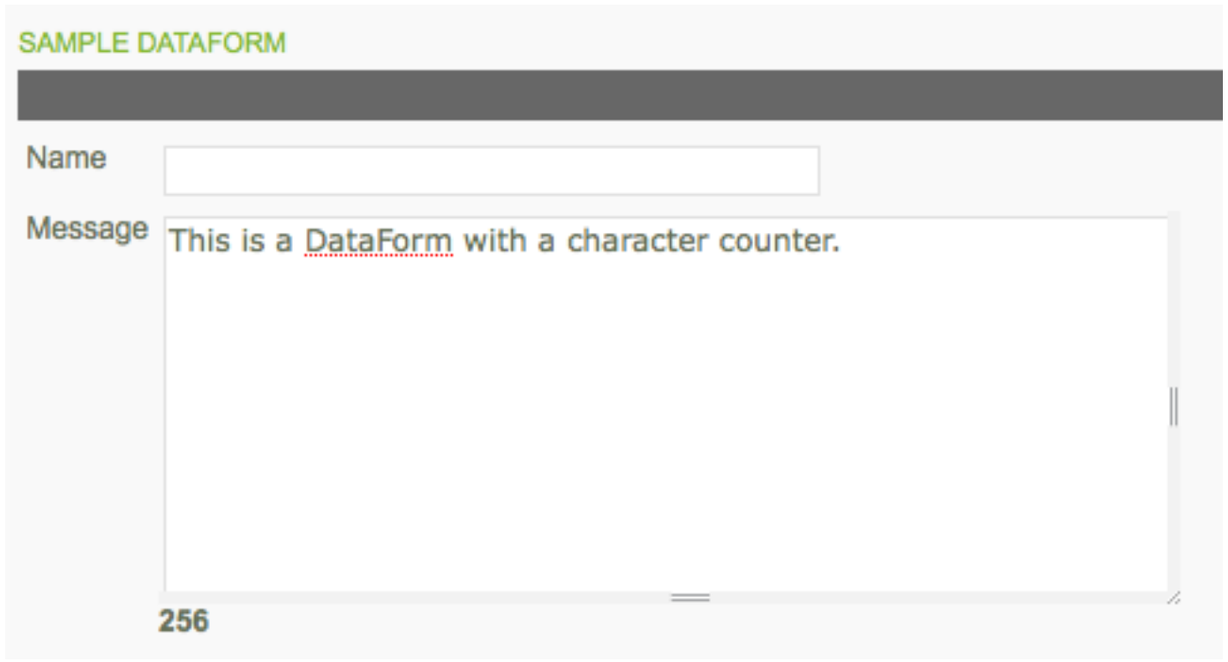


Feedback helps your users!

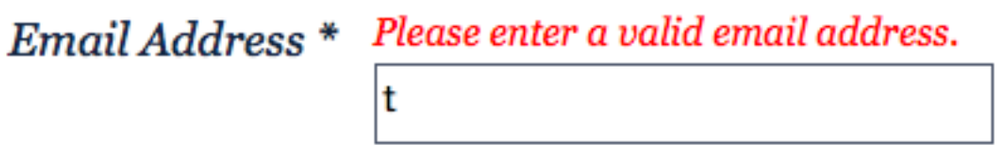
KNOWMAD TECHNOLOGIES

Interactive Feedback

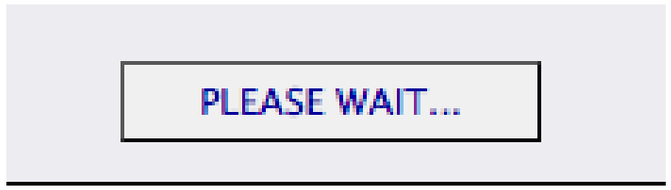
Character Counter



Inline Error Handling

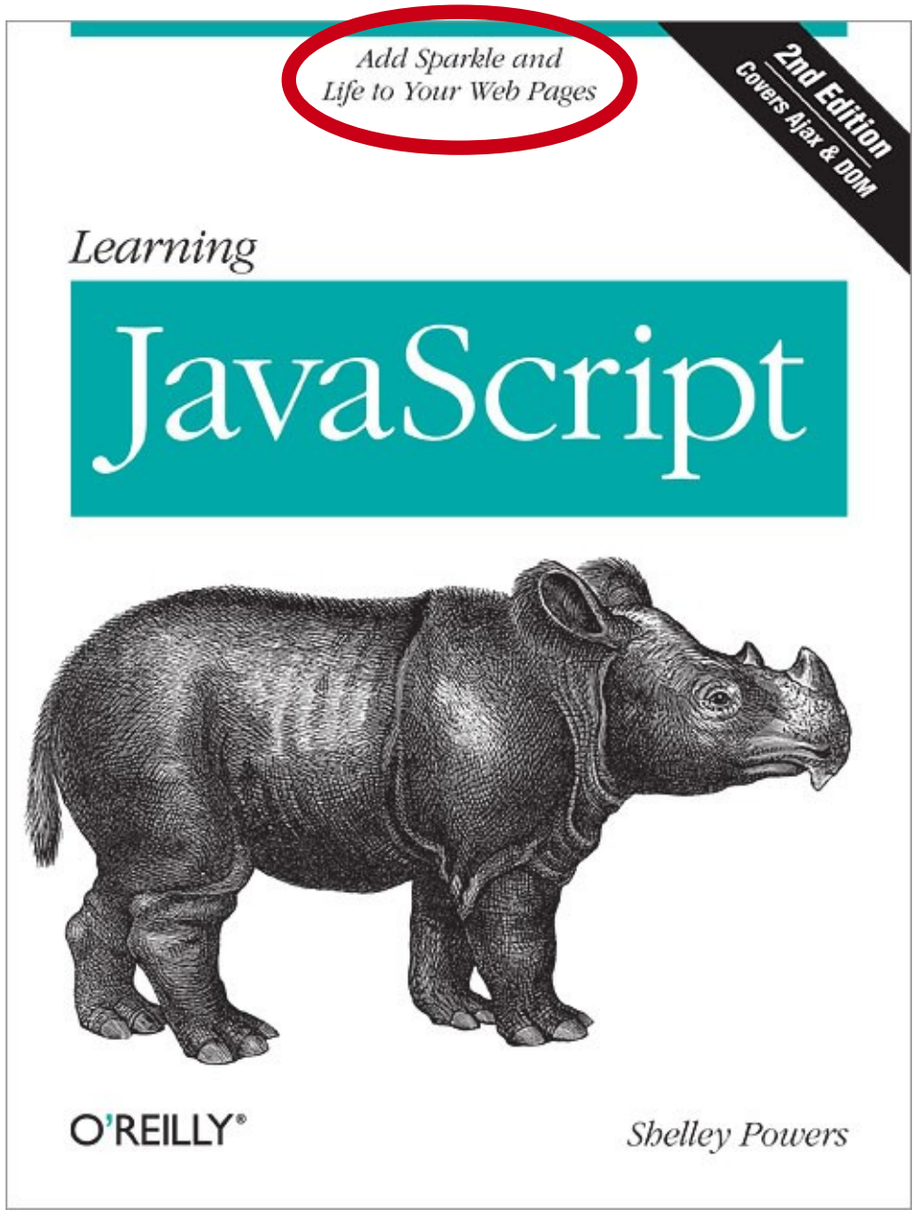


Submit Confirmation



KNOWMAD TECHNOLOGIES

Interactive Feedback



JavaScript is your friend!

Each of the previous examples were implemented by adding JavaScript to a custom Form Template.

We use a combination of YUI & JQuery.

Why stop there?

How can I make **extreme** forms in WebGUI?

- Override tab form behavior
- Add dynamic fields
- Create custom form controls

KNOWMAD TECHNOLOGIES

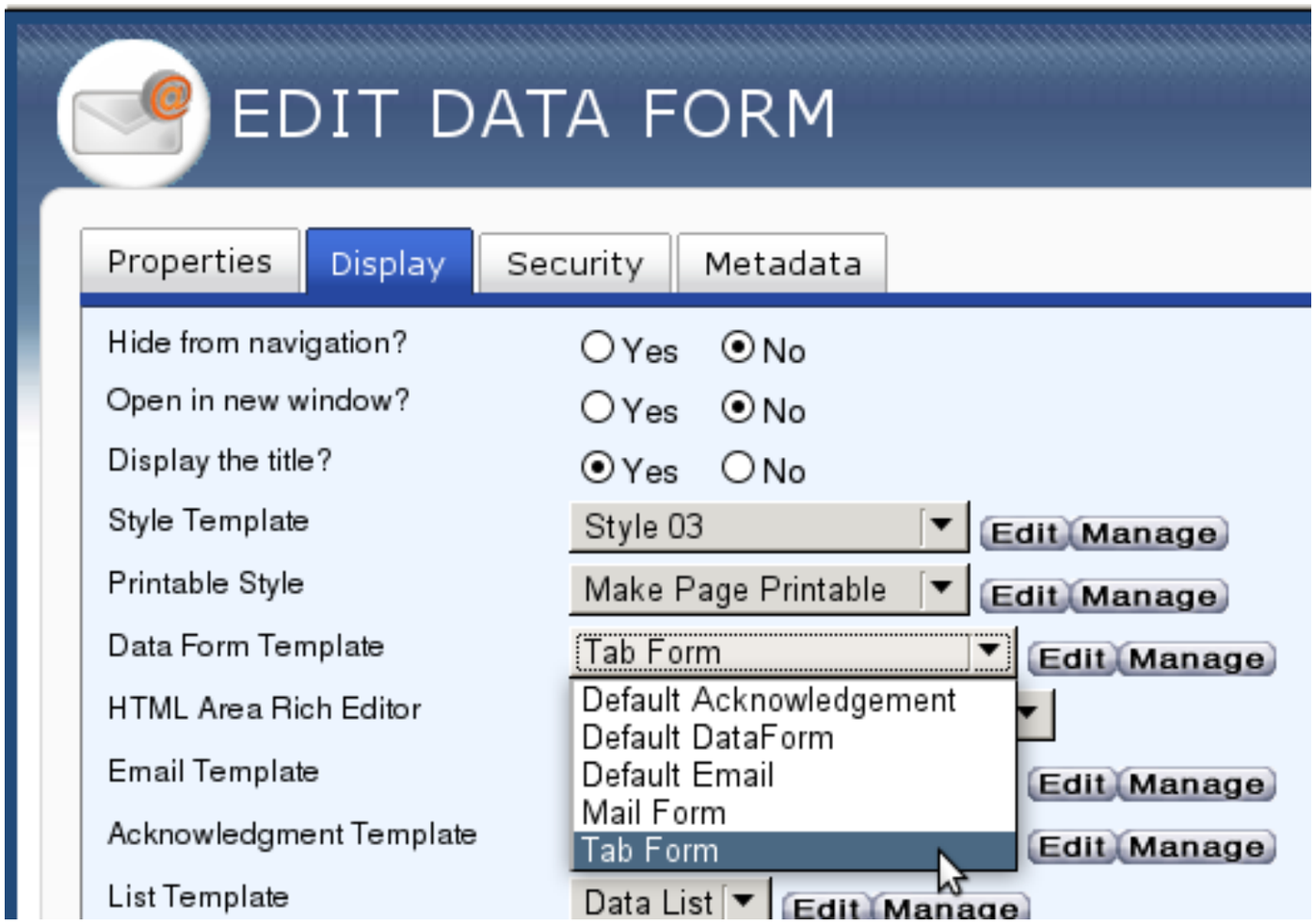
Override Tab Form Behavior

List all entries. • Export tab delimited. • Add a field. • Add a Tab

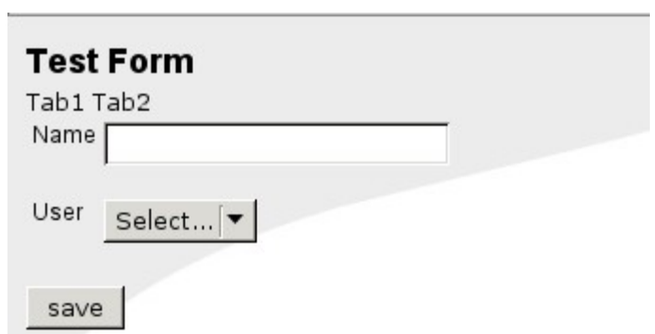
KNOWMAD TECHNOLOGIES

Override Tab Form Behavior

1. Select the Tab form template

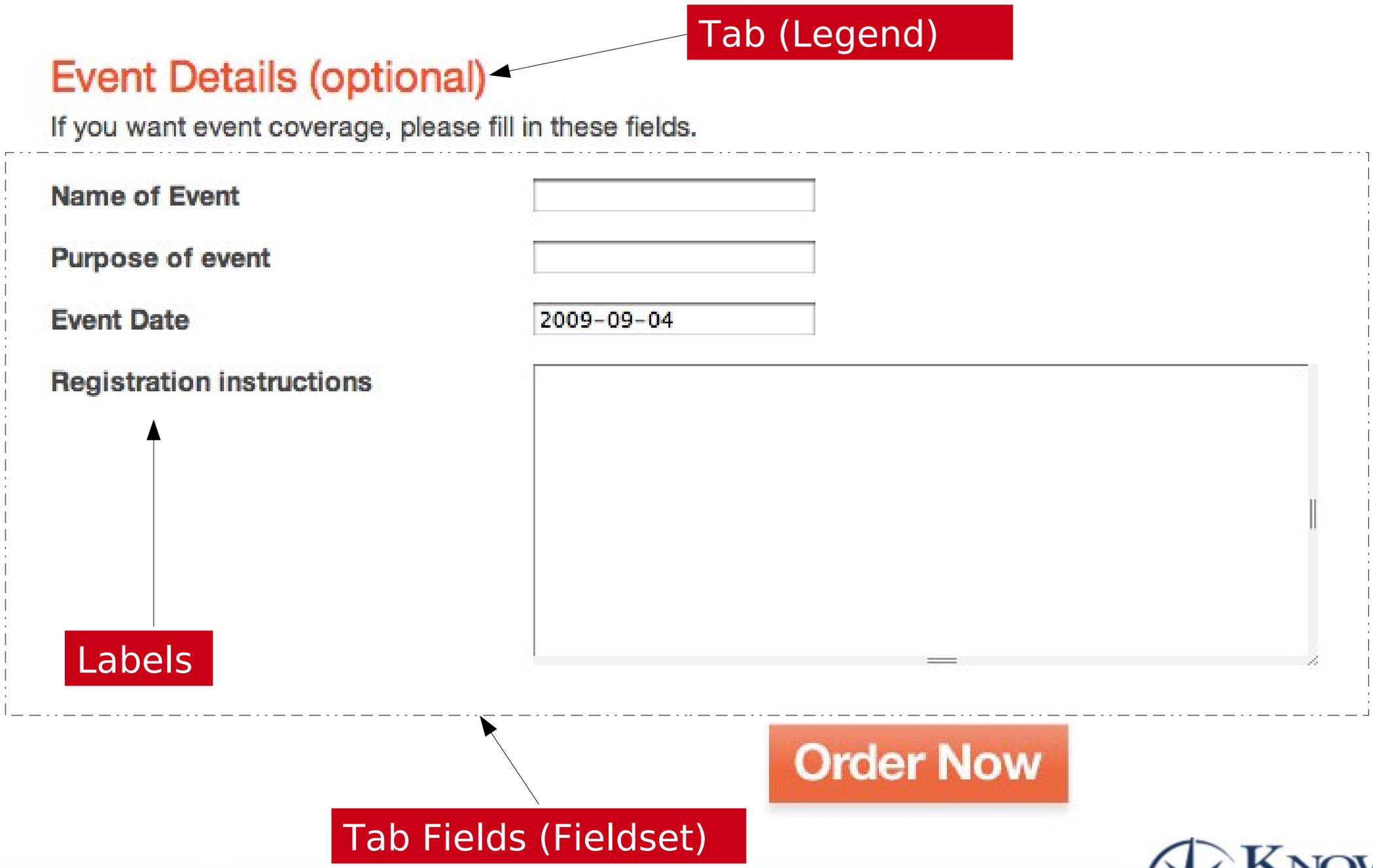


2. Default display

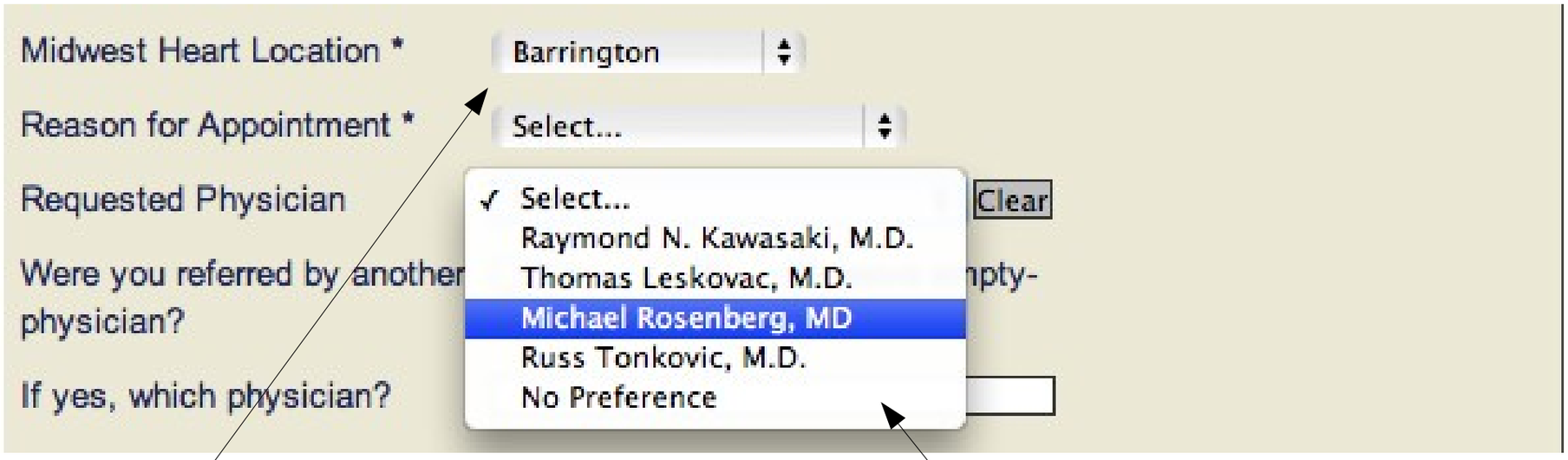


Override Tab Form Behavior

Override Behavior



Build Dynamic Fields

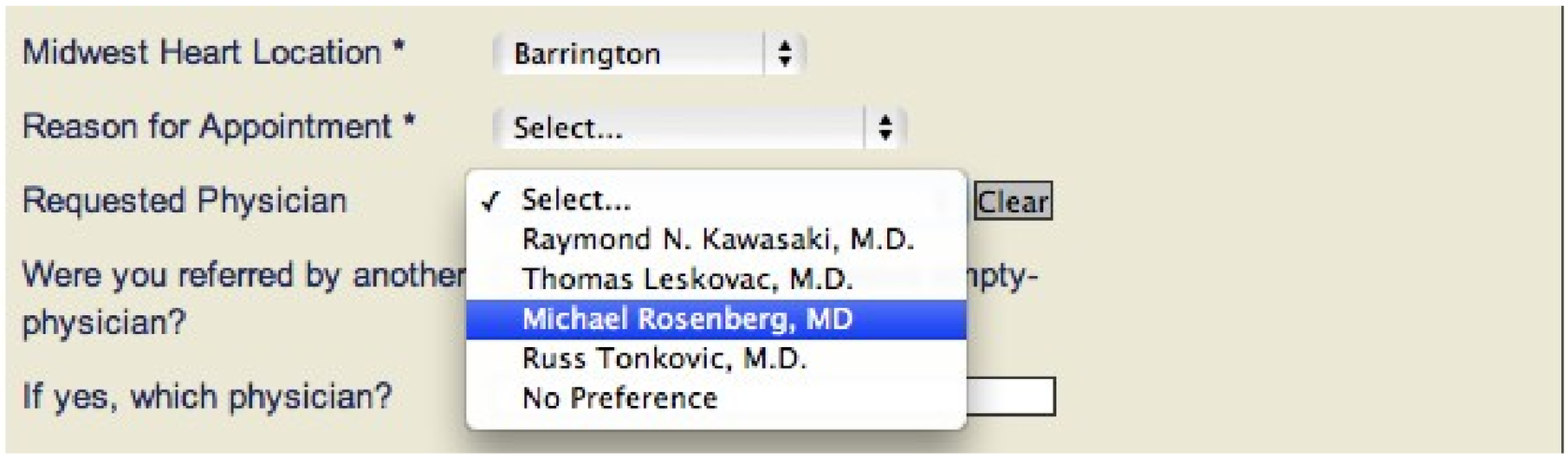


1. Select Location

2. Select a Physician from that location

Build Dynamic Fields

Implementation



1. Use YUI to add an onChange handler to Location
2. Submit a request to an article asset which contains a custom macro with a blank style template
3. Use the response to populate the <select> tag for physician list.

Custom Form Controls

Situation: Our client needed an event management & registration Web site to support their annual volunteer event.

http://30days.leadershipcharlotte.org

KNOWMAD TECHNOLOGIES

Custom Form Controls

Our Solution: We identified the following requirements:

- Administrative interface for managing projects.
- List of upcoming events on Homepage.
- Browseable list of all projects.
- Project details page.
- Online registration form.

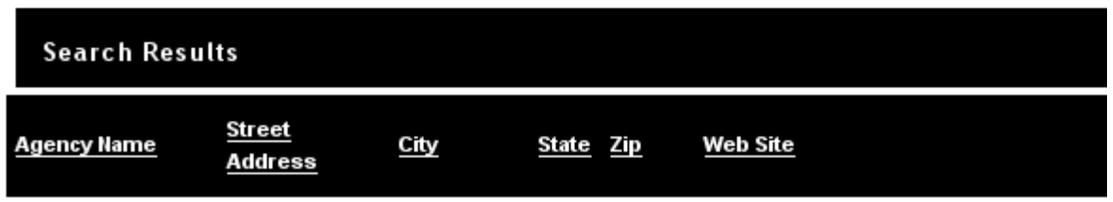
Custom Form Controls

Implementation: We decided that EMS was not a good fit for the basic registration needs of this project. We built an integrated solution using Thingy, SQL Reports and Dataform.

- Management interface: Thingy
- Upcoming events list: SQL Report
- Browsable project list: SQL Report
- Project details page: SQL Report
- Registration form: Dataform with custom template and custom form control

Custom Form Controls

Projects are managed via the Thingy database.

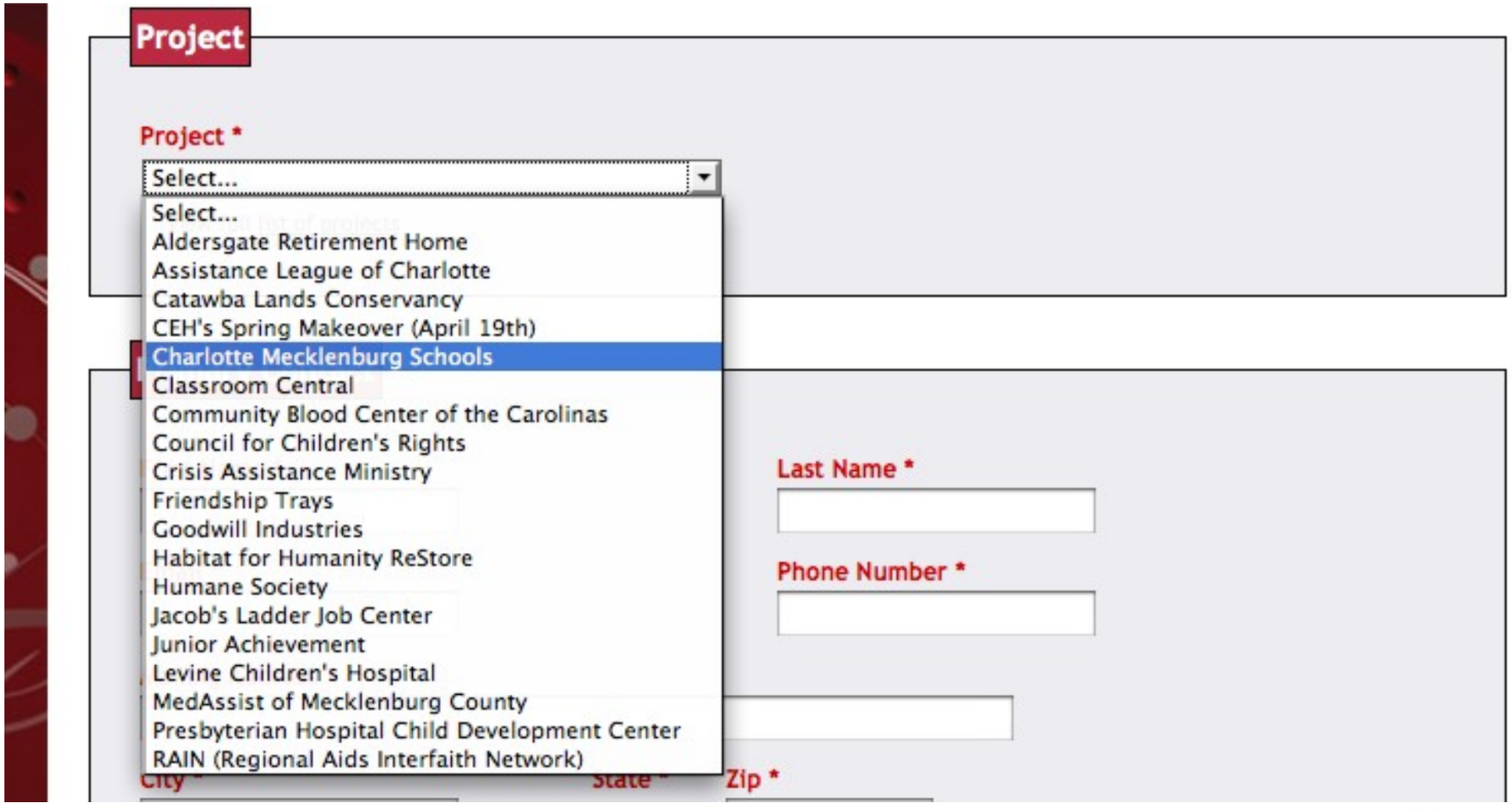


The Registration form needed a way to select a Project from the list stored in the Thingy database.

KNOWMAD TECHNOLOGIES

Custom Form Controls

Our custom control creates a select box using data stored in a Thingy table to be displayed in the DataForm asset (whew!)



Custom Form Controls

WebGUI has a very modular approach to form controls

All control logic is stored in the WebGUI::Form namespace

These modules are used by Data Form, Thingy, User Profile, etc.

Custom Form Controls

Gotchas for using Custom Form Controls with the DataForm asset:

1) Module must be placed in the core WebGUI library path (e.g., /data/WebGUI/lib/WebGUI/Form)[1]

2) The WebGUI::Asset::Wobject::DataForm asset must be modified to include the custom form control.

1. As of WebGUI 7.7.19, this workaround is no longer necessary.

KNOWMAD TECHNOLOGIES

Other fun ideas:

Use auto-tab in fixed fields.

Pre-populate fields from user profile data.

Store user input with cookies.

Thank You!

William McKee

WebGUI Forums: knowmad

IRC: knowmad

Email: william@knowmad.com

Resources Available at

www.knowmad.com/wuc2009