

## When to Use

Use the Application Form page type to provide site visitors with a method of applying to join a group within the Active CM application (apply for a user account).

If you want to create a survey or general form see the Survey Page Type Quick Reference.

### Examples of when to use

The Application Form allows site visitors to join Active CM User Groups. They may need to do this for a number of reasons:

- ▶ A new employee wants access to your intranet site and needs an account to do so.
- ▶ There are personalized areas on your site, and you want to allow people to apply to view those areas.
- ▶ You send Broadcast Emails, and you want to allow people to apply to receive the emails.

Your site can be configured in one of two ways (Global System Variable setting):

- ▶ Users are active when created. This setting allows people to join automatically (without someone from your organization having to approve their application.)
- ▶ Users are inactive when created. This setting requires people to join via an approval process where someone in your organization reviews and approves the application.

## Application Form Page Sections & Fields

<b>Page Section</b>	<b>Field Name/Item</b>	<b>Description of usage</b>
<b>Introduction Text</b>	n/a	Use the editor to add content that appears at the top of your application form.
<b>Application Form Properties</b>	<b>Create Accounts as Public Accounts</b>	A public account flags an account so that it can only be assigned to a public group that allows no permissions. It also allows for the creation of an account with simply an email address, password and preferred full name.
	<b>Response Errors shown in Alert</b>	When this checkbox is selected, an alert will pop up if an applicant has erroneously filled in a form field and attempts to submit the form. It forces the applicant to acknowledge their submission has not gone through.
	<b>Response Error Header Message</b>	You can now customize the error text that will appear at the top of the page if a required field is not filled in before submission.
<b>Public Account Questions</b>	This section is only enabled if the "Create Accounts as Public Accounts" checkbox is selected. This allows you to determine what additional data should be collected for a public account.	
	<b>First Name</b>	Allows you to define whether or not this field is

<b>Page Section</b>	<b>Field Name/Item</b>	<b>Description of usage</b>
		required for a public account or if it should be displayed at all.
	<b>Middle Name</b>	Allows you to define whether or not this field is required for a public account or if it should be displayed at all.
	<b>Last Name</b>	Allows you to define whether or not this field is required for a public account or if it should be displayed at all.
<b>System Profile Questions</b>	This section displays questions the system administrator has setup on the User Profile tab in the Global System Variables Manager. By making any of these questions active they will display as part of your application form.	
	<b>Survey Results</b>	Contains the <b>Download Results</b> button, used to either view or download application form results to an Excel spreadsheet.
	<b>New</b>	Used for creating page breaks between system profile questions.
	<b>Order</b>	This field only appears if questions are present. These numbers are used to reorder the questions on the published form. Click on a number and enter a new number, or use the arrows to move a question up or down in the order.
	<b>Question</b>	Only appears if questions are present. Displays the text of the question.
	<b>Type</b>	Only appears if questions are present. Displays the question type,
	<b>Active</b>	Only appears if questions are present. If the checkbox is checked the question is displayed on the published form. If the checkbox is unchecked, the question is not displayed.
<b>Site Profile Questions</b>	<p>This section displays questions that the system administrator has setup on the User Profile tab in the Sites Manager. Also displays questions that you create for the application form.</p> <p>The application form automatically includes the fields that appear as part of the User Manager:</p> <ul style="list-style-type: none"> <li>▶ First Name, Middle Name, Last Name, and Preferred Full Name</li> <li>▶ Login Username</li> <li>▶ Email</li> <li>▶ Password and Re-enter Password</li> </ul> <p>If the form is set to create public accounts, the automatic fields become:</p>	

<b>Page Section</b>	<b>Field Name/Item</b>	<b>Description of usage</b>
	<ul style="list-style-type: none"> <li>▶ Email Address and Re-enter email address</li> <li>▶ Password and Re-enter password</li> <li>▶ Preferred full name</li> <li>▶ With optional: First Name, Middle Name, Last Name</li> </ul> <p>Email address will become the username value for a public account.</p>	
	<b>Survey Results</b>	Contains the <b>Download Results</b> button, used to either view or download application form results to an Excel spreadsheet.
	<b>New</b>	Used for creating new questions for the application form.
	<b>Order</b>	This field only appears if questions are present. These numbers are used to reorder the questions on the published form. Click on a number and enter a new number, or use the arrows to move a question up or down in the order.
	<b>Questions</b>	Only appears if questions are present. Displays the text of the question.
	<b>Type</b>	Only appears if questions are present. Displays the question type.
	<b>Active</b>	Only appears if questions are present. If the checkbox is checked the question is displayed on the published form. If the checkbox is unchecked, the question is not displayed.
<b>Conclusion Text</b>	n/a	Use the editor to add content that appears below your application form.
		Gets displayed after a user has submitted their application form.
<b>Thank You Message</b>	<b>Use – Link</b>	Allows you to link to another page containing thank you message. After Application Form is submitted, the applicant will be taken to this page.
	<b>Use – HTML</b>	Allows you to enter text in the editor window, as part of the same page.
<b>Thank You Message</b>	n/a	This editor window is only displayed if you have selected <b>Use: HTML</b> in the preceding section. Enter content to display after the Application Form is submitted.

## Special Features

### Processing Submitted Application Forms

You must ensure a group is created (or already exists) to process account applications. This group requires having the User Manager tool available to them. Users in this group receive email notifications when an application form is submitted, and are responsible for approving the applications.

The Global System Variable setting “Users are inactive when created” must be checked in order for emails to be generated and sent when a request is submitted.

### Processing Account Applications

Account Application Emails are emails that are sent automatically by the Active CM during the account application process.

There are three emails that are sent by the system during the account application process.

- ▶ When user first submits an application, they receive **the Account Registration Submitted (User)** email indicating that the system received their application.
- ▶ The users you added to the User Manager group, receive the **Account Registration Submitted (User Managers)** email, indicating that an application has been submitted.
- ▶ When the account is approved (activated), the **Account Approved (Users)** email is sent to the person who applied for the account.

### Activating User Accounts

- ▶ Open the User Manager.
- ▶ Edit the user account
- ▶ Check the Active checkbox on the user’s account and assign the user to the appropriate group(s).
- ▶ Save the user record, the user will receive email notification that their account has been approved.

## Application Form Page Tips!

- ▶ The Application Form is an extension of the User Profile questions created in the Global System Variables and Site Manger. Any **REQUIRED** questions you create for an Application Form will also be required within a User Profile unless you made the question inactive in the Site Manager.
- ▶ Application forms automatically include First, Middle, Last and Preferred Name fields as well as fields for Username, Password and Email address. If you add these fields they will be duplicated on the published form.
- ▶ Once a user has completed the application form, a notification is sent to the email address they include on the application.
- ▶ Information submitted on user’s applications is used to automatically create a user record in the User Manager.
- ▶ The Global System Variable setting “Users are inactive when created” must be checked in order for emails to be generated and sent when a request is submitted.

- ▶ When creating your user manager group, you do not need to make any changes on the **User Domain** tab unless the Users that will be managed by this group are contained within a separate sub-folder location.
- ▶ If you would like to edit the content of any system email, you can do so on the **Email** tab of the **Global System Variables** manager.