Create an HTML Form

SharePoint HTML forms are based on Lists. Lists are like mini-databases inside of SharePoint that define the form’s fields and stores the data submitted from the form. Before you can create the HTML form, you must create the List first. One other note: in SharePoint, the HTML form is created for you automatically based on the List, so you aren’t actually creating/designing the form, just the List.

Create a “Thank You” Redirect Page
Your form must redirect to a “Thank You” page or another page on your website after a person submits the form.

1. See the “Add a Page” tutorial to add a new page, then copy the URL address for the page into the clipboard.

2. Open up Microsoft Word or Notepad (preferred) and paste the URL value that you copied in step 1. You will need this URL address later in this tutorial to create a link to your form. Minimize the window.

Create a List
1. Navigate to your site and select “View All Site Content” from the “Site Actions” menu.

2. Click the “Create” link at the top of the list (Figure 1).
3. Select the “Custom List” option in the “Create” window (Figure 2).

4. Click the “More Options” button on the right.

5. Enter values in the “Name” and “Description” fields.

6. Click the [No] button in the “Navigation” section.

7. Click the [Create] button at the bottom.

8. The “List View” page will display and the “List Tools” tab will appear in the ribbon bar.

9. Before you begin creating columns (i.e. fields for your list/form), some List Settings and List Permissions need to be setup. Click the “List” tab just under the “List Tools” tab of the ribbon bar (Figure 3).

10. Click the [List Permissions] button in the “Settings” section of the ribbon bar (Figure 4).
11. The List Permissions page will display. Click the [Stop Inheriting Permissions] button in the “Inheritance” section of the ribbon bar (Figure 5).

![Figure 5](image)

12. Click the [OK] button for the popup message “You are about to create unique permissions …”

13. Click the [Anonymous Access] button in the “Manage” section of the ribbon bar under the “Permissions Tools” tab (Figure 6).

![Figure 6](image)

14. The “Anonymous Access” window will display. Click the “Add Items” checkbox (Figure 7) and then click the [OK] button.

![Figure 7](image)

15. Click the [Navigation Folder] button in the ribbon bar and select the “Settings” option one level up (Figure 8).
16. The “List Information” page will display. Click the “Advanced settings” link in the “General Settings” section.

17. The “Advanced Settings” page will display. Make the following changes:
   a. In the “Attachments” section, click the [Disabled] button.
   b. In the “Search” section, click the [No] button.
   c. In the “Dialogs” section, click the [No] button, and then click the [OK] button at the bottom.
   d. Click the [OK] button for the popup message “Disabling attachments and saving …”

18. The “List Information” page will display. Now you can finally add the columns (i.e. fields) for your list/form. Scroll down to the “Columns” section. Three columns are automatically created initially. First, the “Title” column should be renamed to be “re-used” for your form (e.g. Student ID or Student Name). Click the “Title” column link in the Columns list to edit it (Figure 9). Leave the other two columns as-is.

![Figure 8](image)

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**Figure 9**
19. The “Edit Field” page will display. Change the “Column Name” field and other field settings (Figure 10).

```
Column name: Title
The type of information in this column is: Single line of text
```

Figure 10

20. The “List Information” page will display. To add another column, click the “Create column” link below the “Columns” section (Figure 9).

21. The “New Field” page will display. Enter a column name and select a type. **Note: Do not use the following column types: Lookup, Person or Group, External Data, or Managed Metadata.** Then specify any Additional Column Settings and Column Validation in those sections (Figure 11). Repeat steps 20 and 21 until all of the columns in your list/form have been created.
22. The “List Information” page will display. The next few steps are to view/test your new form and obtain the URL address for the form to create a link in your menu or on a page. Click the “Navigation Folder” in the ribbon bar and select your list [name] above “Settings” (Figure 8).

23. The “List View” page will display. To view/test your form, click the “Add new item” link under the list view (Figure 12).
24. Before you enter any values in your form, you need to get the URL address of the form. Click in the address bar at the top of your browser, which should highlight the whole URL. Then copy it into the clipboard (e.g. Ctrl+C or right-click-select-copy) (Figure 13).

25. Enter values into your form and click the [Save] button (Figure 14).

26. The “List View” page will display and you will be able to view the submitted form data (Figure 15).
27. If you created a “ThankYou” page at the beginning of this tutorial, open up the Microsoft Word or Notepad window that you previously opened and paste the URL value that you copied in step 24 (Figure 16).

![Figure 16](image)

28. This is where it gets a little tricky. Highlight the text “http://spdb” at the beginning and delete it. Then highlight all the text after this text “Source=” and delete it (Figure 16). This is the beginning part of the URL to add as a menu item link or as a link in a page that will open your new form. (example below)

```
/Information%20Services/Internet/Lists/Test%20Form%201/NewForm.aspx?Source=
```

29. If you created a “Thank You” or redirect page for your form, copy the URL address for the page and paste it in your Word / Notepad document right after the equal sign “=” at the end of the URL address above (step 28). **Note:** do not include the “http://spdb” part at the beginning of the URL address (example below).

**Before** (this is the URL address for the form redirect page):

```
/Information%20Services/Internet/Pages/ThankYou.aspx
```

**After** (redirect page URL address appended to the end of the form URL address):

```
/Information%20Services/Internet/Lists/Test%20Form%201/NewForm.aspx?Source=/Information%20Services/Internet/Pages/ThankYou.aspx
```

If you don’t need a “Thank You” page, then just use your website’s home page (or other page) as the redirect page URL address (e.g. `/Information%20Services/Internet/Pages/5016.aspx`) (example below).

```
/Information%20Services/Internet/Lists/Test%20Form%201/NewForm.aspx?Source=/Information%20Services/Internet/Pages/5016.aspx
```

**You must provide a redirect page URL address to protect your form data.**

30. Creating links to your form:
   a. **Menu Item Link:** to create a menu item in your website’s menu to open the form, see the “Edit the Site Menu” tutorial on how to add a menu item and paste the URL address above (step 29 – “After”) into the “URL” field (Figure 17). Don’t check the “Open link in new window” box.
Page Link: to create a link on a page to open your form, see the “Link Tools” tutorial on how to add a hyperlink (“From Address”) and paste the URL address above (step 29 – “After”) into the “URL” field (Figure 18). Don’t check the “Open link in new window” box.

Adding an Alert (Email Notification) when the Form is Submitted

1. If you wish to send an email notification to someone when the form is submitted, you will need to add an “Alert” to your List. Navigate to the “List View” of your List either by the “Navigation Folder” or by going to the “Site Actions” menu, select the “View All Site Content” option, and then clicking on your List’s title link in the Lists section.

2. You should see the “List Tools” tab at the top of your screen in the blue ribbon bar. Click the “List” sub-tab, and click the [Alert Me] button in the “Share & Track” section (Figure 1).
3. The “New Alert” window will display. Modify the “Alert Title” as you wish. Add or change users in the “Send Alerts To” section. Click the [Address Book] button below the “Users:” box to look-up and add recipients (Figure 2).

**Alert Title**

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

**Send Alerts To**

You can enter user names or e-mail addresses. Separate them with semicolons.

![Figure 2](image)

**Important Note:** The “Send Alerts To” recipient (i.e. email address in the “Users:” box) must be a user in SharePoint in order to actually receive the alert email. If they are not a user, they will have to be added to SharePoint as a special user (contact the Webmaster for assistance).

4. In the “Change Type” – “Only send me alerts when:” section, click the [New items are added] radio button. In the “Send Alerts for These Changes” section, click the [Someone else changes an item] radio button.

5. In the “When to Send Alerts” section, choose the appropriate option. If you receive only a few form submissions per week, then the [Send notification immediately] option is best. However, if you receive many form submissions per day, then the [Send a daily summary] option may be best.

6. Click the [OK] button at the bottom of the window to save the alert. You will receive an email notifying you that the alert is in effect. You can change the alert or delete it by selecting the “Manage My Alerts” option from the [Alert Me] button drop-down menu (Figure 3).

![Figure 3](image)
Adding a CAPTCHA Field to the Form

I have recently implemented some enhanced security measures for our HTML forms, and one of those measures is the ability to add a CAPTCHA field to your form. Add a “what” to my form? A CAPTCHA field is one of those fields where you see an image on the form (Figure 1) and you have to enter the characters in the image to prove that you’re a human submitting the form and not a “spam-bot”. If you’ve ever filled out a form online, then you’ve probably seen a CAPTCHA field before.

Figure 1

Following are the steps to add a CAPTCHA field to your HTML form. **For security reasons, I strongly suggest adding this CAPTCHA field to your HTML forms as soon as possible.**

1. Login, navigate to your site, and then to your List (i.e. click on your List’s library link where you will then see your List’s data/records).

2. Click the “List” sub-tab under the “List Tools” tab in the ribbon bar.

3. Click the [List Settings] button in the “Settings” section of the ribbon bar.

4. Scroll down to the bottom of the “Columns” section where you’ll see some links.

5. Click the “Add from existing site columns” link. The “Select Columns” window will appear (Figure 2).
Figure 2

6. Select “Custom Columns” from the “Select site columns from:” field.

7. Click the “Validation” column from the “Available site columns” box, and then click the [Add >] button.

8. Click the [OK] button and you’re done. You’ll now see a CAPTCHA field like Figure 1 on your HTML form that won’t allow the form to be submitted until the image characters have been entered correctly.

Note: You won’t see the CAPTCHA field when you are logged into the website internally (an error message, “Input error: Invalid referrer,” will display, OK to ignore). It only appears correctly when filling out the form on the public website where the form’s URL is www.shastacollege.edu/path/to/your/form/etc.

More …
Adding a Heading to the Form

As mentioned before, when you create a list, the HTML form is created automatically, but it only displays the labels, fields, and buttons. There isn’t any heading or instruction text. The following steps show you how to add additional content to your form.

1. Navigate to your List’s data view by clicking on the List’s title link in your site’s View All Site Content page.

2. Click the “List” sub-tab under the “List Tools” tab.

3. In the “Customize List” section of the ribbon bar, click the [Form Web Parts] button menu and select the “Default New Form” option (Figure 1).

   Figure 1

4. The ribbon bar will change and the form layout editor page will appear (Figure 2). Click the “Add a Web Part” link above your form.

   Figure 2

5. The web part selector window will appear under the ribbon bar. Select “Media and Content” from the “Categories” list. Then select “Content Editor” from the “Web Parts” list (Figure 3). Then click the [Add] button on the right.
6. Click the “Click here to add new content” link in the “Main” content area to begin adding content similar to a regular publishing page. You’ll notice that the “Editing Tools” tab appears in the ribbon bar, which allows you to format the text (Figure 4).

7. When finished adding content, click the “Page” tab in the ribbon bar, and then click the [Stop Editing] button (Figure 5). There isn’t any check-in or publish options for editing HTML forms.