

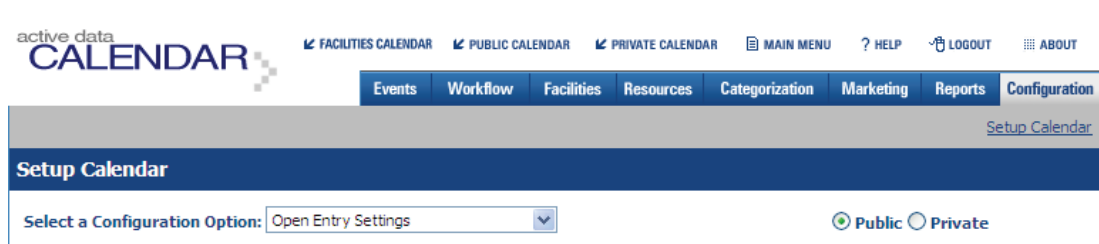
Active Data Calendar Open Entry Form Implementation Guide

Overview

The Open Entry Form allows administrators to create an interactive open event entry submission process that funnels events directly into previously customized Calendar workflow. The form can be implemented using a system generated link based on the calendar base URL (Generate Form) or by placing the generated form code (Generate Code) directly on an external web page.

Public vs. Private Forms

A public and private version of the form can be utilized to match your public and private calendar category structure. Specific categories can be hidden from the open entry form in the Categorization tab of the calendar and the individual category level. Use the toggle in the upper right hand corner of the configuration page to access both versions of the form.



Configuration of Fields

To configure the Open Entry Form you will need administrative privileges to configure the calendar. Proceed by logging into the application and navigate to the Configuration tab. Select Open Entry Settings from the drop down menu of options. On the right, under "Current Form Configuration", you will see the fields listed that are automatically included in the default form. These fields are required by Active Data Calendar for the Open Entry Form. Fields listed under "Field Configuration" are optional for inclusion on your Open Entry Form. Note that the four configurable fields from the "Custom Event Administration Settings" can be used in the open entry form the same way as the normal event entry process. Internal notes are also considered only for internal use and will never be published live with the final event posting.

Open Entry Form Configuration

Fields listed below in the default form preview include fields that are required by Active Data Calendar for the Open Entry Form. Fields listed under "Field Configuration" are optional for inclusion on your Open Entry Form. Click the checkbox besides a field name to select it for inclusion on your form. You can click the PREVIEW button to view the new fields in your form without saving the changes. Once you are ready to save the form, click the SAVE button. The Open Entry Module only allows for one active Open Entry Form at a time, so be sure to remove the old form (link or HTML) if you were previously utilizing a different form.

[CREATE FORM](#) [GENERATE CODE](#)

<h4>Field Configuration</h4> <p>Event Submitted By</p> <p><input checked="" type="checkbox"/> Organization <input checked="" type="radio"/> Optional <input type="radio"/> Required</p> <p><input checked="" type="checkbox"/> Phone # <input checked="" type="radio"/> Optional <input type="radio"/> Required</p> <p>Event Information</p> <p><input checked="" type="checkbox"/> Upload Image</p> <p><input checked="" type="checkbox"/> Upload Attachment</p> <p><input checked="" type="checkbox"/> Event Location (Location/Building/Room Option)</p>	<h4>Current Form Preview</h4> <p>Submit an Event Request (Help?)</p> <p>Please complete the form below to submit your event request. Fields marked with an * are required to complete the form submission. Your event will be forwarded to the appropriate Calendar administrator(s) for review and approval before being posted to the calendar.</p> <p>Event Submitted By (This information will not be displayed with event.)</p> <p>*First Name: <input type="text"/></p> <p>*Last Name: <input type="text"/></p> <p>*Email Address: <input type="text"/></p>
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Click the checkbox beside a field name to select it for inclusion on your form. You can click the PREVIEW button to view the new fields in your form without saving the changes. Once you are ready to save the form, click the SAVE button.



TIP: The Open Entry Module only allows for one active Open Entry Form at a time, so be sure to remove the old form (link or HTML) if you were previously utilizing a different form.

Choosing a Department for Workflow

One department in Active Data Calendar must be chosen to manage all incoming open entry submission requests. The most effective way to manage new open entry submission requests separate from internal user event requests is to create a new department to handle just open entry requests. It is recommended to describe the new department respectively, such as "Open Entry Submission". Events listed on the main menu of the chosen department's administrator will show the user submitting the event as being underlined. Clicking on the user's link will allow the administrator to retrieve the contact information of the person submitting the event.

Customization of Text and Graphics

Customizations can be made to the text areas of the form on the initial event entry screen, the event preview screen and the final preview screen. Typically, this is an effective way to indicate ways that the organization would like the form used as well as communicating expected processing time to the user.

Custom graphics can also be uploaded to the form for a unique look and feel that continues to extend the organization's existing web branding approach. If "Generate Form" is used to generate the form then the headers and footer uploaded in custom graphic settings will be used on the form entry pages. If "Generate Code" is used to generate the form, then the web page that the form is included on should have a unique header and footer. For general form post back reasons it is not recommended to use any form of side navigation.

Your organization can customize the look/colors/format of these buttons, however it is recommended to maintain the text/name of the buttons since they are referenced from within the HELP file that is made available to open entrants who are submitting events through your form.

General Form Selections

*All Open Event Submissions Entered Under Department:
Open Entry Submission

*Customize Text for Top of Form
Please complete the form below to submit your event request. Fields marked with an * are required to complete the form submission. Your event will be forwarded to the appropriate Calendar administrator (s) for review and approval before being posted to the calendar.

*Customize Text for Preview
Please review the event preview below and ensure that your event information is correct. If you would like to make changes, use the "BACK" button below to go back to the event entry form. To finalize your event submission, click the "SUBMIT" button below.

*Customize Text for Final Confirmation
The appropriate calendar administrators will review your event and approve it for release to the appropriate calendar(s). You will receive a confirmation email with your event details shortly. Please print this screen for your records. You may click the link below to submit another event.

Customize Form Buttons (Click name to see image.)

Submit
Browse...

Back
Browse...

Submit Another Event
Browse...

CANCEL PREVIEW SAVE

Overview

The Open Entry Form allows administrators to create an interactive open event entry submission process that funnels events directly into previously customized Calendar workflow. Calendar allows for only one active version of the Open Entry Form at one time, so be sure to remove the old form (link or HTML) if you were previously utilizing a different form.

Ways to Generate Form

- **If using "GENERATE HTML"**
If you ever click the "SAVE" button from the open entry configuration page in the Calendar Administration area, all open entry forms will immediately stop working until you update the intended Open Entry Form page to include the new form HTML.
- **If using "GENERATE FORM"**
If you ever click the "SAVE" button from the open entry configuration page in the Calendar Administration area, the system generated open entry page will immediately be updated and continue working as expected.

Note: Regardless of Form Generation Option Selected - Any visitor to the Open Entry Form may have the page cached. If this is the case, then the form will not work appropriately until the local cache is cleared or refreshed.



TIP: It is recommended as a "best practice" to regenerate the form after an upgrade to validate the upgrade. This ensures that if something was changed in the application that the changes are now reflected in the live form.

Business Rules for Regenerating Forms

Field/Data Changes inside Calendar Administration Area

1. **Category Delete Action:** If a Category is Deleted, the Form must be regenerated (Generate Form) or new HTML placed on designated form page (Generate HTML).
Expected Result if Form is not Re-generated after a Category Delete Action: If you add an event to a category that has been deleted from calendar but is still in the open entry list the submission will not work.
2. **Delete Department Action:** If a Department is Deleted, and the Department was chosen for Open Entry Workflow, the Form must be regenerated or the submissions are not flagged appropriately in the database and will require a database update in order to be assigned to a new Department.
3. **Delete Location (Location, Building or Room):** The form may continue to work appropriately if any location is deleted, however Active Data recommends regenerating the form after any location delete action.

Client HTML Modifications to Generated Form HTML - Clients may elect to modify the HTML code that is produced by Active Data Calendar Open Entry Form generation. If the code is modified, be sure not to affect the following important validation script that is included:

- If you post invalid dates for the event.
- If you post an invalid recurrence the submission.
- If any posted field lengths that are too long and exceed the maximum number of characters for a field.

Contact Support

Please contact Product Support at (610)-997-8100 or support@activedatax.com for further assistance