



Arena: Form Builder

Presented by:

Ben Lane

Senior Arena Training Lead

shelby**systems**

©2013 Shelby Systems, Inc.

Other brand and product names are trademarks or registered trademarks of the respective holders.

Objective

Learn step by step how to build custom forms and deploy them in Arena. Form Builder uses the Custom Fields and Custom Field Groups so you can create surveys and forms to display statistics or credential information.

In this session, you will learn:

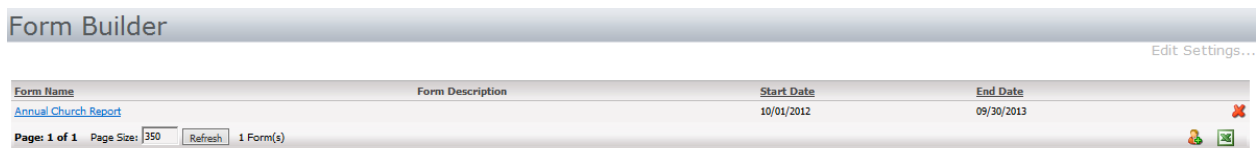
- What the Form Builder is
- How to set up the forms
- How to see the results
- How to use on your external website

Arena Form Builder

The Form Builder in Arena is very new and is still under development at this time, but the functions that are available form the foundation for a very useful tool. It is designed primarily for Headquarter organizations that need a good way to collect information from their churches or pastors. This tool allows you to create custom forms, have churches or individuals enter their information, and then be able to retrieve that information. Since it is built on the already existing custom field structure in Arena, the forms are easy to build.

Building Forms

To build a form, navigate to the area where the Form Builder is located.



The screenshot shows the 'Form Builder' interface. At the top, there is a header 'Form Builder' with an 'Edit Settings...' link. Below this is a table with columns: 'Form Name', 'Form Description', 'Start Date', and 'End Date'. The table contains one row with the form name 'Annual Church Report', a description, a start date of '10/01/2012', and an end date of '09/30/2013'. Below the table, there is a status bar showing 'Page: 1 of 1', 'Page Size: 350', a 'Refresh' button, and '1 Form(s)'. There are also icons for a new form and a delete form.




Either click the new icon in the lower right hand corner to add a new form or click the name of the form to open an existing one.



The screenshot shows the 'Form Detail' interface. At the top, there is a header 'Form Detail' with an 'Edit Settings...' link. Below this are several input fields: 'Name' (with 'New Form' entered), 'Description' (with a text area), 'Start Date' (with a date picker), and 'End Date' (with a date picker). Below these are sections for 'Custom Fields' and 'Custom Field Modules'. The 'Custom Fields' section has a table with columns: 'Label', 'Visible', 'Required', 'Location', 'Type', and 'Type Qualifier'. The 'Custom Field Modules' section has a table with columns: 'Category', 'Module', 'Attributes', and 'Remove'. At the bottom, there are 'Update' and 'Cancel' buttons, and a section for 'Add New Field Module' with a dropdown menu set to 'Church' and an 'Add' button.

Provide a name and description for the form and then enter the date range that this form will be active. The next two areas are where the form will be created using Custom Fields and Custom Filed Modules. They both can do the same thing, but the Custom Field Modules will allow you to set up multiple fields and save them for future use, thereby saving time.

Set up Custom Fields

To add a Custom Field, select the New Custom Field  icon, and then click the Edit Custom Field  icon. Fill in the required fields as desired and needed. To change the order of Custom Fields use the  arrow button.

Custom Fields

Custom Fields are fields that you can add to your event so that information specific to your event can be collected from the user when they register for the event. You can configure the fields label, location, type, behavior, and list of acceptable values.

Label	Visible	Required	Location	Type	Type Qualifier
T-Shirt size	<input checked="" type="checkbox"/>		Left	Checkbox (List)	P,S,M,L,XL,XXL

Label: Label Location:

Field Type: Size: Rows: Pixels Wide

Read-Only Enable Auto-Fill Show On List

- Address
- Area
- Checkbox (List)
- Custom Query
- Date
- Document
- Dropdown List
- Image
- Lookup Type
- Person
- Phone Number
- Radio List
- Rich Text Field
- Static HTML Content
- Textbox**


- **Label** – Enter the name for the custom field.
- **Label Location** – Select the label location. *Options are left, right, top, or bottom.*
- **Field Type** – Select the type of field to use.
 - **Address** – This field give you the ability for participants to enter an address.
 - **Area** – This field enables you to specify a page to display the group area. This works with groups and allows records to show up on a map.
 - **Checkbox** – This field enables you to create a multi-select list of options for participants. Enter the options in comma-delimited format in the Values field.
 - **Custom Query** – This field enables you to enter a custom query in the Query field.
 - **Date** – This field allows registrants to enter a date.
 - **Document** – This field enables registrants to attach a document. *You will first need to select a Document Type to associate with uploaded registrant documents. Document Type is a customizable Lookup.*
 - **Dropdown List** – This field enables you to create a drop-down list of options for registrations to select. *Enter values in comma-delimited format (e.g. Option A, Option B, Option C) in the Values field.*
 - **Image** – This field enables registrants to upload an image.
 - **Lookup Type** – This field enables you to select an existing drop-down from Lookups.
 - **Person** – This field enables registrants to search for a single existing record, using default Person Page ID (7).
 - **Phone Number** – This field enables registrants to enter a 10-digit telephone number with the option to enter an extension.

- **Radio List** – This field enables you to create a single-select radio list of options for registrants. *Enter values in comma-delimited format (e.g. Option a, Option B, Option C) in the Values field.*
- **Rich Text Field** – This field enables you to enter rich text.
- **Static HTML Content** – This field enables you to enter static text or static HTML-formatted text in the HTML field.
- **Textbox** – This field enables registrants to enter text.
- **Rows** – Use this option to adjust the number of rows to use for the custom field, e.g., a rich text field or static HTML content.
- **Pixels Wide** – Use this to specify the width of the custom field.
- **Value(s)** – Depending on the Field Type, you may be required to enter a value for the choices presented. *Field Types that require this are checkbox, radio, drop-down, and static. These values are comma-delimited for multiple values.*
- **Visible** – Check this box to make the field visible (both internally and externally).
- **Required** – Check this box for fields that registrants are required to select or complete.
- **Read Only** – Check this box for view only fields. *This will make the field display as a disabled field (grayed out).*
- **Enable Auto-Fill** – For forms behind a member login, check this box for required custom fields.
- **Show on List** – Check this box for fields to display on the Tag-Member page.

Custom Field Modules

Custom Field Groups are a predefined collection of fields Arena Administrators create for use with Groups, Tags, and Mission Trips. *You can edit Custom Field Groups only on this page. Users are not able to edit the fields.*

Steps to Create Custom Field Groups:

- 1) Go to Administration\Custom Field Groups.
- 2) Click **Add**. Arena creates a New Field Group placeholder.
- 3) Click the **Edit**  button.




Group Name	# of Fields	Category	Active		
New Field Group	0				

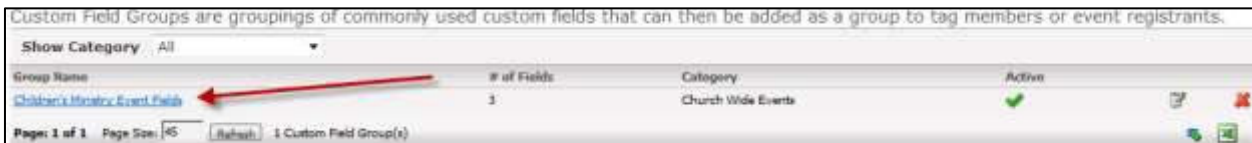
- 4) **Enter a Group Name** for this custom field group. *This is the group name users select, not the specific fields.*
- 5) **Select a Category**. *You can customize this Custom Field Module Category Lookup.*



Group Name	# of Fields	Category	Active		
Transportation	1	Church Wide Events			
Medical	2	Church Wide Events			
Custom Field Samples	13	Church Wide Events			
Trinity Sample	3	Church Wide Events			
Mission Registration	0	Church Wide Events			

Page: 1 of 1 Page Size: 133 Refresh 5 Custom Field Group(s)

- 6) Click the **Update**  button to save.
- 7) **Select the name** of the new Custom Field Group.



Custom Field Groups are groupings of commonly used custom fields that can then be added as a group to tag members or event registrants.

Group Name	# of Fields	Category	Active		
Children's Ministry Event Fields	1	Church Wide Events			

Page: 1 of 1 Page Size: 45 Refresh 1 Custom Field Group(s)

- 8) Select the **Add New Field**  button to create a field.



Label	Visible	Required	Read Only	Auto Fill	Show On List	Type	Qualifier
There are no results to display.							

Page: 1 of 1 Page Size: 45 Refresh 0 Field(s)

Add New Field

9) **Complete fields**, as desired.

Custom Field

Title

Title Location

Type

Rows

Pixels Wide

Visible Yes No

Required Yes No

Read Only Yes No

Auto Fill Yes No

Show On List Yes No

- **Title** – Enter the name for this the custom field.
- **Title Location** – Select where to display the field. *Options are left, right, top, bottom, and none.*
- **Type** – Select a field type. *Options are below.*
 - **Address** – This field gives users the ability to enter an address.
 - **Area** – This field enables you to select an available area. *You can create Areas in Groups.*
 - **Checkbox** – This field enables you the ability to create a multi-select list of options for users. *Enter values in comma-delimited format in the Values box that displays below the Type dropdown.*
 - **Custom Query** – This field gives you the ability to enter a custom SQL query.
 - **Date** – This field allows users to enter a date.
 - **Document** – This this field gives users the ability to attach a document. *You must create at least one Document Type for this field to be available.*
 - **Dropdown List** – This field enables you the ability to create a drop-down list of options for users to select. *Enter values in comma-delimited format in the Values box that displays below the Type dropdown.*
 - **Image** – This field gives users the ability to upload an image.
 - **Lookup Type** – This field gives users the ability to select a drop-down from existing Lookups.
 - **Person** – This field gives users the ability to search for a single existing record. *Person Page ID is "7."*
 - **Phone Number** – This field gives users the ability to enter a 10-digit telephone number with the option to enter an extension.
 - **Radio List** – This field gives you the ability to create a single-select radio list of option for users. *Enter values in comma-delimited format in the Values box that displays below the Type dropdown.*
 - **Rich Text Field** – This field gives users the ability to enter rich text.
 - **Static HTML Content** – This field gives you the ability to enter static content, with the option to use HTML.
 - **Textbox**- This field gives users the ability to enter text.

- **Rows** – Used to expand area for fields; enables word wrapping for the number of entered rows.
- **Pixels Wide** – This option widens the custom field box, often used with Checkbox, Radio List, Rich Text Field, Static and HTML Content.
- **Visible** – Check this box to make the field visible.
- **Required** – Check this box for fields that are required.
- **Read Only** – Check this box to indicate fields that are view only. *This will make the field display as a disabled field (grayed out).*
- **Enable Auto-Fill** – Check this box for the field to auto-populate, using existing Arena data. *This option is for fields behind a login.*
- **Show on List** – Check this box for fields to display on the confirmation page of event registration.

10) Click **Update**.

11) **Repeat** steps 8 and 9 for all fields you want to add to the Custom Field Group.

Steps to Delete a Custom Field and Custom Field Group:

- 1) **Remove** where custom field is used.
- 2) Go to Administration**Custom Fields Groups**.
- 3) Select the Custom Field Group.
- 4) **Identify** the custom field you want to delete
- 5) Click **red X** to delete the field.
- 6) Go back to Administration**Custom Fields Groups**.
- 7) Click **red X** to delete for the Custom Field Group.

Form Detail

Edit Settings...

Name

Annual Church Report

Description

The Annual report for my conference/District.

Start Date

10/1/2012

End Date

9/30/2013

Custom Fields

Custom Fields are fields that you can add to this Form so that information specific to this Form can be entered.

Label	Visible	Required	Location	Type	Type Qualifier				
Average Weekly Children SS Attendance	✓		Left	Textbox		↓			✗
Average Weekly Youth SS Attendance	✓		Left	Textbox		↓	↑		✗
Average Weekly Adult Attendance	✓		Left	Textbox		↓	↑		✗
Average Weekly Worship Attendance	✓		Left	Textbox			↑		✗

Custom Field Modules

Field Modules are pre-configured groupings of Custom Fields that can be added to this Form. If you have a group of fields that you consistently use, these fields can be set up as a Field Module so that you can easily add them here. The Arena Administrator(s) can set these field modules up for you.

Category	Module	Attributes	Remove
Default	Member Files	Membership (Arena.Portals.UI.FieldTypes.TextBoxField) Number of Additions by Salvation (Arena.Portals.UI.FieldTypes.TextBoxField) Number of Additions by Transfer (Arena.Portals.UI.FieldTypes.TextBoxField)	✗

Add New Field Module: Church

Update

Providing Access

After you have set up your forms, you need to determine how people will have access to enter the information. There are a couple of determining factors on how you would set this up. Primarily, you need to determine if everyone who will be entering information will be in the database before entering information in the form. If so, they will log in and the system will automatically recognize them and the information entered on the form will be assigned or related to that record. If they do not have a record, they can create an account and then the system will relate the data enter on the form to the newly created record. If the person does not have a record and it is not required by you that they have a record, then the survey will have and Frist and Last name Field as well as the form questions. When this happens the data will be stored, along with the person's name, and the information entered.

The second consideration is related to the location of the web page that they will be directed to enter the data. You can use your existing website and hyperlink to your Arena website, or you can just send a hyperlink directly to the page where the form is located.

Retrieving the Form Data

There are several ways to retrieve the form data after it has been entered.

On the Form—Below, where the form was created, a list of all the people who have filled out the forms will appear and their data will be visible when the record is selected.

Name
Annual Church Report
Description
The Annual report for my conference/District.
Start Date
10/1/2012
End Date
9/30/2013

Participant Name	Date Completed
First Baptist Church (777)	10/14/2013

Page: 1 of 1 Page Size: 350 1 Participant(s)

From the person's/Organization record.

First Baptist Church (777) Edit Settings...

Person Detail

Individual Information Security Person Viewed Prayer Requests Contributions Counseling Church Hospital Visits Forms

First Baptist Church (777)

Person Detail

Individual Information	Security	Person Viewed
Annual Church Report ▾		
Annual Church Report		
Average Weekly Children SS Attendance 500		
Average Weekly Youth SS Attendance 450		
Average Weekly Adult Attendance 793		
Average Weekly Worship Attendance 2000		
Membership 3512		
Number of Additions by Salvation 100		
Number of Additions by Transfer 200		

Other Reporting options:

Metrics: Metrics are charts that populate from queries run against the database. Metrics are found under the Membership Navigation Bar, but can be placed on a dashboard.

Report Grid From Query: Report Grid from query is a very versatile and flexible reporting tool. It can be placed on any page and is based on a query.

Customized Reports from Reporting Services: Microsoft's reporting Services/Visual Studio allows you to create custom reports and different designs to view your returned data in many different varieties.



Ben Lane
Senior Arena Training Lead
Ben.lane@shelbyinc.com



Before joining Shelby Systems as a certified staff trainer, Ben Lane served as a youth minister and a minister of education at various churches. His desire is to help churches maximize their ministry through effective use of Shelby software. Currently he is Senior Arena Training Lead and oversees training on the exciting web-based Arena software.