WMS PRO TIPS

Featuring Webforms

Sharing experiences and tool knowledge in the WMS

www.mcgill.ca/polling
Session ID: protips
How the WMS advances

Regular WMS updates → Continuous improvements → Iterative releases
WMS DIGEST
Latest WMS news and announcements

New features and updates

Do you follow?
If you've activated your site's Follow block, social media icons will now appear in your footer! We recommend removing the block from other locations where it may have been placed to avoid confusing your site visitors. Read how-to...

Feeling left out can be a good thing
When you're already funnelling readers to specific pages using the template blocks, a left-hand menu does little more than take up valuable real estate in your page layout. You can now request left-hand menu items be removed from specific pages. Submit request...

View all recent WMS articles

The WMS community

WMS pro tips  Cyber security  A friendly
The WMS community

- Growing desire to make better websites
- Innovative application of tools by Site Admins
- Self-organizing support, e.g. the Faculty of Engineering
Featured event...

The World of Webforms

Pop Quiz

Features, tips and trends from community
Down to the bottom
Turn on the Action
SKILLS21 is a new approach to your academic, professional and personal success.
The Panama Field Study Semester (PFSS) is a joint venture between McGill University and the Smithsonian Tropical Research Institute (STRI). Students will be living for up to four months in Panama taking courses that specifically address Latin America social and tropical environmental issues.

Read more

Webform presentation topics survey

We're currently planning our next WMS presentation which will feature the popularly requested topic, webforms. Let us know which specific webform topics you would like to hear about.

Respond to the survey
Dashboard Confessionals

Better information can help make better decisions
<table>
<thead>
<tr>
<th>Name</th>
<th>Roles</th>
<th>Last access</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jason <a href="mailto:Delmarr@mcgill.ca">Delmarr@mcgill.ca</a></td>
<td>CCS Developer, McGill Managers, McGill Staff and Faculty</td>
<td>2 min 55 sec ago</td>
<td>IT Communications</td>
</tr>
<tr>
<td>Lai Yee <a href="mailto:Lee@mcgill.ca">Lee@mcgill.ca</a></td>
<td></td>
<td>1 day 7 hours ago</td>
<td>IT Communications</td>
</tr>
<tr>
<td>Joyce <a href="mailto:Peralta@mcgill.ca">Peralta@mcgill.ca</a></td>
<td></td>
<td>2 days 2 hours ago</td>
<td>IT Communications</td>
</tr>
<tr>
<td>Karolina <a href="mailto:Marasinska@mcgill.ca">Marasinska@mcgill.ca</a></td>
<td></td>
<td>2 days 6 hours ago</td>
<td>IT Communications</td>
</tr>
<tr>
<td>Thomas <a href="mailto:Fline@mcgill.ca">Fline@mcgill.ca</a></td>
<td></td>
<td>2 weeks 5 days ago</td>
<td>IT Communications</td>
</tr>
<tr>
<td>David De <a href="mailto:Charette@Mcgill.Ca">Charette@Mcgill.Ca</a></td>
<td></td>
<td>3 weeks 1 day ago</td>
<td>Content and Collaboration Solutions</td>
</tr>
<tr>
<td>Mark <a href="mailto:Styles@Mcgill.Ca">Styles@Mcgill.Ca</a></td>
<td></td>
<td>1 month 4 days ago</td>
<td>Content and Collaboration Solutions</td>
</tr>
<tr>
<td>Lee Yan <a href="mailto:Marquez@mcgill.ca">Marquez@mcgill.ca</a></td>
<td></td>
<td>1 month 3 weeks ago</td>
<td>Content and Collaboration Solutions</td>
</tr>
<tr>
<td>Jesse <a href="mailto:Sutherland@mcgill.ca">Sutherland@mcgill.ca</a></td>
<td></td>
<td>2 months 5 days ago</td>
<td>Content and Collaboration Solutions</td>
</tr>
<tr>
<td>Sara <a href="mailto:Gomez@mcgill.ca">Gomez@mcgill.ca</a></td>
<td></td>
<td>9 months 3 weeks ago</td>
<td>Music, Schulich School of</td>
</tr>
</tbody>
</table>
Put it on my Tab
McGill Montreal Demo Day

Date: September 12, 2017
Time: 5PM-8PM
Location: Club Soda, Montreal, QC

As the McGill X-1 Accelerator barrels towards a strong finish, Demo Days are top of mind. On September 12, you can come cheer on the home team, right here in Montreal. Get your free tickets now!
TORONTO DEMO DAY
October 3, 2017

SF DEMO DAY
September 19, 2017

MONTREAL DEMO DAY
September 12, 2017

NYC DEMO DAY
October 10, 2017

BOSTON DEMO DAY
September 14, 2017

McGill Montreal Demo Day
Date: September 12, 2017
Time: 5PM-8PM
Location: Club Soda, Montreal, QC

As the McGill X:1 Accelerator barrels towards a strong finish, Demo Days are top of mind. On September 12, you can come cheer on the home team, right here in Montreal. Get your free tickets now!
Faculty of Arts

The social sciences and humanities are the soul of our university. Education in the Faculty of Arts, both undergraduate and graduate, gives students the tools to understand their world and to improve upon it.
### Expand your expertise

**SKILLSETS categories**

Our activities are organized into seven themes of professional development. Navigate the tabs on the left for an overview of each category.

See all upcoming workshops.

<table>
<thead>
<tr>
<th>SKILLSETS categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand your expertise</td>
</tr>
<tr>
<td>Solve problems</td>
</tr>
<tr>
<td>Lead projects</td>
</tr>
<tr>
<td>Communicate</td>
</tr>
<tr>
<td>Work with others</td>
</tr>
<tr>
<td>Be well</td>
</tr>
<tr>
<td>Plan your career</td>
</tr>
</tbody>
</table>

**SKILLSETS offers workshops to help you strengthen your knowledge in your field. You will learn practical applications of various tools and technologies to develop innovative solutions to problems and enrich your knowledge of your chosen discipline.**

**Offerings:**

**MyResearch Modules:** With our partners at McGill Libraries, we offer opportunities for you to develop your organizational, technical and project management skills as it pertains to your research. [Read More](#)
Current events
ENABLE / DISABLE CHANNELS EVENTS SEARCH

Channels Events Search is currently enabled and can be viewed at Events.

Please note it will take some time before all events are displayed in the calendar.

[Disable]
My Hero
Conference Rooms

The 6th floor of the Elizabeth Welles Music Building houses a large conference room (A615) and a lounge. These spaces can be used separately or as one large room by raising or lowering the dividing wall. A615 and A614 are frequently used for workshops, large and small meetings, conferences and special events.

In addition to A615, A614, there are small conference rooms for use by staff on the 6th and 7th floor of the Elizabeth Welles Music Building.
The Main Event

www.mcgill.ca/polling
Session ID: protips
World of Webforms
Thank you survey respondents!

Survey results:
1. Formatting your webforms
2. Conditionals
3. Webform security
4. Submissions and other settings
5. Wizards with webforms
Let’s mix it up a bit

Today’s presentation
1. Formatting your webforms
2. Wizards with webforms
3. Conditionals
4. Submissions and other settings
5. Webform security
Formatting your webforms

Matrix
Advanced Grid
Select options in columns
Formatting your Webforms

Matrix
Displays subcomponents in columns:
• Textfield
• Select options
• Label
• Date
• Textarea
Add row feature

Remove row feature
- Per Matrix single button
- Row wise delete button
- Not Required

Add row button text *
[I have more ponies!]

Remove row button text *
[Remove a row]

Remove row header text
[Remove action]
Formatting your Webforms

Matrix

• Difficult to modify
  • Can’t change order
• Glitchy
  • Date component
  • Add row/Remove row
• Submission data appears in one cell
• Cannot reference subcomponents in Emails or Conditionals

VERDICT: Use with CAUTION
# Formatting your Webforms

## Advanced Grid

### Webform presentation topics

If you’re here, it means that you’re interested in attending an upcoming presentation on webforms. Below, you’ll find a short list of proposed topics for the presentation, and we’d like to gauge your interest by letting you indicate the topic you would be most interested in.

**Indicate your level of interest**

Please rank each topic according to your level of interest, with 5 being the highest and 1 being the lowest.

<table>
<thead>
<tr>
<th>Topic</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Webform security</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conditionals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Formatting your forms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wizards with webforms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submissions, Emails and other settings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Formatting your Webforms

Advanced Grid
Displays components in rows
• Works with any component
  • Components are simply nested in the grid
• Options are displayed as column headings

Build your own Pony!

My Little Pony customizer

<table>
<thead>
<tr>
<th></th>
<th>White</th>
<th>Yellow</th>
<th>Light blue</th>
<th>Fuchsia</th>
<th>Purple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tall</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Body</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eyes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Unicorn
Do you want your pony to be a unicorn?
• None

Markings
Please select a type of marking...or not. Markings will appear on your pony's flanks.
• None

Name your pony
First name
Last name

Give your pony a birthdate
Month
Day
Year
Formatting your Webforms

Advanced Grid
Combine different fields with the same options

Without grid

```
<table>
<thead>
<tr>
<th></th>
<th>White</th>
<th>Yellow</th>
<th>Light blue</th>
<th>Fuchsia</th>
<th>Purple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mane</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tail</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Little Pony customizer

Body

<table>
<thead>
<tr>
<th></th>
<th>White</th>
<th>Yellow</th>
<th>Light blue</th>
<th>Fuchsia</th>
<th>Purple</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Eyes

<table>
<thead>
<tr>
<th></th>
<th>Light blue</th>
<th>Fuchsia</th>
<th>Purple</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```
<table>
<thead>
<tr>
<th>LABEL</th>
<th>FORM KEY</th>
<th>TYPE</th>
<th>VALUE</th>
<th>REQUIRED</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Little Pony customizer</td>
<td>container</td>
<td>Grid</td>
<td>-</td>
<td></td>
<td>Edit, Clone, Delete</td>
</tr>
<tr>
<td>Body</td>
<td>body</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit, Clone, Delete</td>
</tr>
<tr>
<td>Eyes</td>
<td>eyes</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit, Clone, Delete</td>
</tr>
</tbody>
</table>
### Formatting your Webforms

#### Advanced Grid
Combine different fields with the same options

**With grid**

<table>
<thead>
<tr>
<th>My Little Pony customizer</th>
</tr>
</thead>
<tbody>
<tr>
<td>**</td>
</tr>
<tr>
<td>Mane</td>
</tr>
<tr>
<td>Tail</td>
</tr>
<tr>
<td>Body</td>
</tr>
<tr>
<td>Eyes</td>
</tr>
</tbody>
</table>

Table: 
- **Mane**: Select colors for mane.
- **Tail**: Select colors for tail.
- **Body**: Select colors for body.
- **Eyes**: Select colors for eyes.
## Formatting your Webforms

### Advanced Grid
Combine different fields with the same options

#### Without grid

<table>
<thead>
<tr>
<th>My Little Pony customizer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mane</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Tail</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

#### With grid

<table>
<thead>
<tr>
<th>My Little Pony customizer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mane</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Tail</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Body</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Eyes</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Formatting your Webforms

Advanced Grid
Complex forms in a single table
<table>
<thead>
<tr>
<th><strong>Unicorn</strong></th>
<th>Do you want your pony to be a unicorn?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- None -</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Markings</strong></th>
<th>Please select a type of marking...or not. Markings will appear on your pony’s flanks.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- None -</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Name your pony</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Give your pony a birthdate</strong></th>
<th>Month</th>
<th>Day</th>
<th>Year</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Any special requests?</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Email</strong></th>
<th>Please leave us your email if you would like to receive news from the Pony Express</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Show your pony</strong></th>
<th>Already have a pony? Upload an image to share!</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Files must be less than 2 MB.</td>
</tr>
<tr>
<td></td>
<td>Allowed file types: gif jpg jpeg png.</td>
</tr>
<tr>
<td></td>
<td><img src="button.png" alt="Choose File" /> No file chosen <img src="button.png" alt="Upload" /></td>
</tr>
<tr>
<td>LABEL</td>
<td>FORM KEY</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>My Little Pony customizer</td>
<td>container</td>
</tr>
<tr>
<td>My pony</td>
<td>my_pony</td>
</tr>
<tr>
<td>Body</td>
<td>body</td>
</tr>
<tr>
<td>Eyes</td>
<td>eyes</td>
</tr>
<tr>
<td>Unicorn</td>
<td>unicorn</td>
</tr>
<tr>
<td>Horn</td>
<td>horn</td>
</tr>
<tr>
<td>Markings</td>
<td>markings</td>
</tr>
<tr>
<td>Marking color</td>
<td>marking_color</td>
</tr>
<tr>
<td>Name your pony</td>
<td>name_your_pony</td>
</tr>
<tr>
<td>First name</td>
<td>first_name</td>
</tr>
<tr>
<td>Last name</td>
<td>last_name</td>
</tr>
<tr>
<td>Give your pony a birthdate</td>
<td>give_your_pony</td>
</tr>
<tr>
<td>Any special requests?</td>
<td>any_special_requests</td>
</tr>
<tr>
<td>Email</td>
<td>email</td>
</tr>
<tr>
<td>Show your pony</td>
<td>show_your_pony</td>
</tr>
<tr>
<td>Don't show your pony</td>
<td>dont_show_your_pony</td>
</tr>
</tbody>
</table>

New component name: Textfield

Save
Formatting your Webforms

Advanced Grid

Pros:
• Compact, better aligned forms
• Can work with any component
• Works with Emails and Conditionals
• Data is displayed correctly in Excel

Cons:
• Hidden fields are still visible as empty rows
• Retains width when vertical menus and/or sidebar blocks are present

VERDICT: Wins over Matrix
Formatting your Webforms

Select options in columns

- Adds visual interest to forms
- Adaptive
  - No menu, no sidebar – 3 columns
  - With menu – 2 columns
  - With menu, with sidebar – 1 column
- Works well with grids and fieldsets
- Doesn’t work with long labels
Which component is affected by the presence of vertical menus and sidebar blocks?

A. Matrix  
B. Advanced Grid  
C. Select Options  
D. Pony saddles
Wizards with webforms

Wizards
What makes a wizard
Good to know
Wizards with webforms

- Simplify complex tasks
- Direct users to content
- Create short quizzes

Who's your Pony?

What kind of pony are you? *

- Earth
- Pegasus
- Unicorn

Next
Who's your Pony?

What kind of pony are you?  
- Earth
- Pegasus
- Unicorn

Next
Who's your Pony?

Which pegasus pony qualities do you possess?

- Loyal, competitive, brash
- Nervous, shy, empathetic
Who's your Pony?

You are Rainbow Dash!

Rainbow Dash is a female Pegasus pony and one of the main characters in My Little Pony Friendship is Magic. She maintains the weather and clears the skies in Ponyville. As a huge fan of the Wonderbolts, she becomes a reservist member of the elite flying group in Testing Testing 1, 2, 3 and a full member in Newbie Dash. In Sonic Rainboom, Rarity and Princess Celestia both declare that she is the best flier in all of Equestria. Rainbow Dash has a pet tortoise named Tank, whom she chooses out of Fluttershy's offered animals in the episode May the Best Pet Win! She represents the element of loyalty.

(image and text from http://mlp.wikia.com/wiki/Rainbow_Dash)
Wizards with webforms

What makes a wizard

- Questions
- Next and Previous buttons
- Results

Who's your Pony?

What kind of pony are you? *

- Earth
- Pegasus
- Unicorn

Next buttons
<table>
<thead>
<tr>
<th>LABEL</th>
<th>FORM KEY</th>
<th>TYPE</th>
<th>VALUE</th>
<th>REQUIRED</th>
<th>OPERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>What kind of pony are you?</td>
<td>pony_type</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Your qualities</td>
<td>your_qualities</td>
<td>Page break</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Which earth pony qualities do you possess?</td>
<td>earth_pony_qualities</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Which unicorn pony qualities do you possess?</td>
<td>unicorn_pony_qualities</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Which pegasus pony qualities do you possess?</td>
<td>pegasus_pony_qualities</td>
<td>Select options</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Your pony!</td>
<td>your_pony</td>
<td>Page break</td>
<td>-</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Twilight Sparkle</td>
<td>twilight_sparkle</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Applejack</td>
<td>applejack</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Fluttershy</td>
<td>fluttershy</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Rarity</td>
<td>rarity</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Pinkie Pie</td>
<td>pinkie_pie</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
<tr>
<td>Rainbow Dash</td>
<td>rainbow_dash</td>
<td>Markup</td>
<td>&lt;h2&gt;</td>
<td></td>
<td>Edit Clone Delete</td>
</tr>
</tbody>
</table>
Wizards with webforms

Wizards have:
- Questions
- Next and Previous buttons
- Progress bar
- Results

Can be used to:
- Simplify complex tasks
- Direct users to content
- Create short quizzes

Good to know:
- Should be anonymous
- Works best with simple questions
- Skip the confirmation page
Conditionals

Parts of a conditional
Complex conditionals
Examples
Best practice
Conditionals

Hide or show components based on the value of other components
Conditionals

Parts of a conditional:
• Condition
• Consequence
Conditionals

If X, then A
- If Will you be requesting a release, buyout or sabbatical? is Yes
  then What will you be requesting?
- If Winter courses: Winter 2019 - Course A isn’t shown
  then Languages: I can speak is English and Continents: I’d like to go to is Asia
  then University of Santo Tomas is shown

If X OR Y, then B
- If Sabbatical: Length of sabbatical is winter term 2019 or
  Sabbatical: Length of sabbatical is full year
  then Winter courses: Winter 2019 - Course A isn’t shown

If X AND Y, then C
- If Languages: I can speak is English and Continents: I’d like to go to is Asia
  then University of Santo Tomas is shown
If (X OR Y) AND Z, then A

If X AND Z, then A, then B
Conditionals

Question 1

Earth

Question 2.1

Pegasus

Question 2.2

Unicorn

Question 2.3
Conditionals

Tips and best practice

• Plan your forms beforehand
• Keep it simple
• Only one "stream" can lead to a particular outcome
What is used to evaluate answers in wizards?

A. Progress bar
B. Conditionals
C. Questions
D. Horns made of pure silver
Submissions and other settings

Submission access
Submission settings
Customizing emails
Submissions and other settings

Submission access

- Anonymous
- Authenticated
  - McGill Staff and Faculty
  - McGill Casual Staff
  - McGill Affiliate
  - McGill Student
  - McGill Undergraduate Student
  - McGill Academic Staff
  - All Faculty and Staff
Submissions and other settings

Submission settings
Total submissions limit
• Closes the form after a specific number of submissions
• Used to manage the number of submissions, e.g. registration for a limited number of spots
  • See: Limited Select Options component
Per user submission limit
Submissions and other settings

Customizing emails
Reference components in email settings
• Email template
  • [submission:values] will include all the labels and submissions values
Avoid transmitting confidential information via email
• Use individual Submission tokens
• Remove components from Included E-mail Values
Submissions and other settings

Customizing emails
Use component values to specify email settings
• a unique email address can be assigned per key value pair

Best practice
• Verify email settings if you edit or update the component
• List your select options alphabetically
Webform Security

Anonymous forms
Do's and Don'ts
Webform Security

Anonymous forms

Do protect against spambots

• Submission Access > Per user submission limit under Form settings

Do not use these fields:

• File upload field

• Email address fields + Textarea fields on forms that are configured to send emails upon submission
Webform Security

Anonymous forms

When collecting information using WMS webforms you must adhere to the Act Respecting Access to Documents held by Public Bodies and the Protection of Personal Information (the “Access Act”) and McGill’s policies regarding confidential information.

Do not collect credentials and confidential information:

• Usernames, access codes, account numbers, passwords, PINs, tokens or other authentication

• All elements of a student’s record are confidential:
  • Name
  • student identification number
  • permanent code
  • address data
  • citizenship information
  • social insurance number
  • birth date
  • immigration information
  • photographs for McGill student identification
  • academic data such as degree obtained, course registration, grades, grade point average, etc.
  • Documents that are stored in the imaging systems normally contain personal, hence confidential, information
Webform Security

Do’s and Don’ts

Do not, under any circumstances, request users to provide:
- SIN numbers
- Credit Card numbers
- Debit Card numbers

Do keep security in mind
- Require users to sign in before filling out forms
- Avoid forwarding confidential information in submissions via email

Do maintain your forms
- Download your form submissions
- Unpublish or delete your forms when no longer needed
- Close forms to submissions before making updates
Acknowledgments

Credit where credit is due:
https://durpy.deviantart.com/
https://nethear.deviantart.com/
https://xpesifeindx.deviantart.com/
What must you never do in a webform?

A. Transmit confidential information via email
B. Collect SIN, credit card and debit card numbers
C. Include File Upload fields in Anonymous forms
D. All of the above
The Wrap-up
WMS DIGEST

Latest WMS news and announcements

New features and updates

Do you follow?
If you've activated your site's Follow block, social media icons will now appear in your footer! We recommend removing the block from other locations where it may have been placed to avoid confusing your site visitors. Read how-to...

Feeling left out can be a good thing
When you're already funnelling readers to specific pages using the template blocks, a left-hand menu does little more than take up valuable real estate in your page layout. You can now request left-hand menu items be removed from specific pages. Submit request...

View all recent WMS articles

The WMS community

WMS pro tips  Cyber security  A friendly
Tabs two ways

We now have a new feature where you can display tabbed content in the WMS. You can choose whether the tabs are displayed horizontally or vertically.

Features:
- Horizontal tabs
- Vertical tabs
- The horizontal tabs are distinguished by a grey background.
- The vertical tabs are distinguished by a lighter background colour and a red line.

To insert a tabbed content, simply add the following HTML code:

```html
<ol>
  <li class="tab-header">Tab 1</li>
  <li class="tab-header">Tab 2</li>
  <li class="tab-header">Tab 3</li>
  <li class="tab-header">Tab 4</li>
</ol>

These tabs will appear in a box, and you can switch between them by clicking on the respective tab.

Classy touches for your WMS site

Add style to your web pages using classes in the WMS.

Ever feel like your web page needs a little something to make it pop? With a bit of CSS styling, you can break up dense text or add contrast by highlighting certain items. Your page becomes easier to scan and this helps visitors get the information they need quickly.

How to apply a class

Add styling by applying CSS classes directly to your HTML elements. A number of classes are available in the WMS for various tags. While working in the source view, simply edit the HTML by adding a class to the opening tag, typically using this syntax: `<p class="classname">`.

Here are some classy additions you can consider:

Ordered list

Use the "enhance" class in your ordered lists and the numbers will appear in a pretty accent colour.

Example: `<ol class="enhance">`

1. Track your application status
2. Submit your supporting documents

How healthy is your WMS site?

We’re pleased to announce the release of the new WMS site managers! The Dashboard displays an array of reports that provide information about your site usage and broken links.

The Dashboard makes it easy for you to monitor your site visitors and ensure they are having a better experience possible.

Accessing the Dashboard

To view the Dashboard, log into your site admin and click on "Dashboard" in the top menu.

It’s a good idea to visit your Dashboard on a routine basis and address concerns as they arise.

More steps to a healthy website:

- A New Year’s resolution you can stick to? Site customisation.
Resources

Take the survey: evaluate this event
www.mcgill.ca/wms/events

Visit our articles:
https://www.mcgill.ca/wms/articles

Drop in: Training labs WMS 302
Thank you!

The Web Service Group is dedicated to continuous improvement and supporting site managers in making the best McGill websites.