



USER GUIDE


ENTERPRISE FORMS AND PUBS

3/5/21



1. INTRODUCTION

The Enterprise Forms and Pubs was created to provide Agencies with the capability of having a filter and searchable list for their website. Agencies can have one forms and pubs per subsite.

2. TURNING ON FORMS AND PUBS

- 2.1. Login to your respected AUTH website (e.g.: <https://auth-agency.pa.egov.com/sites/dcnr/Pages/default.aspx>), go to the **subsite** you would like your forms and pubs solution
 - 2.1.1. Click 
 - 2.1.2. Click "Site settings"
 - 2.1.3. Under Site Actions, click "Manage site features"
 - 2.1.4. Find the feature, "PA.SpEnterprise.FormsAndPubsNew Data List" Feature, click Activate
 - 2.1.5. If you would like to add content to the application page, Find the feature, "PA.SpEnterprise.FormsAndPubsNew page content" Feature, click Activate (If activated, this list will be mandatory to be filled out)

3. ADDING YOUR CHOICES AND NAMING YOUR COLUMNS

- 3.1. Login to your respected AUTH website (e.g.: <https://auth-agency.pa.egov.com/sites/dcnr/Pages/default.aspx>), go to the **subsite** you would like your forms and pubs solution
 - 3.1.1. Click 
 - 3.1.2. Click "Site contents"
 - 3.1.3. Click FormsAndPubs
 - 3.1.4. Under the editing toolbar, select List
 - 3.1.5. Select 

3.1.6. You will then see a Columns Section:

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type	Required
Title	Single line of text	✓
Modified	Date and Time	
Created	Date and Time	
DocNum	Single line of text	✓
LinkUrl	Hyperlink or Picture	✓
Filter1	Choice	
Filter2	Choice	
Field1	Single line of text	
Field2	Multiple lines of text	
Created By	Person or Group	
Modified By	Person or Group	

- [Create column](#)
- [Add from existing site columns](#)
- [Column ordering](#)
- [Indexed columns](#)

3.1.7. Click the Column name in gray, this allows you to know what columns on the backend you are editing

3.1.7.1. To edit the name, type in the Column name under Name and Type

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

NOTE: This will not change the names on the Frontend of the website, follow Section 4 for those steps

NOTE: DO NOT change the column order or type, this will break the feature (you can now change the type for Field 1 and Field 2), If you change the

content type with content already existing you may lose the data. Save the data in excel first.

3.1.7.1.1. Click OK

3.1.7.2. To add your choices to the Filter1, Filter2, and Field 2 (if changed to choice) columns

3.1.7.2.1. Click Filter1, under Additional Column Setting and find the box that says:

Type each choice on a separate line:



A screenshot of a text input field with a light gray border. The text inside the field is: Fact Sheet, Form, Publication, Map, each on a new line. There is a small cursor icon in the bottom right corner of the field.

3.1.7.2.2. Add all your choices here

NOTE: Do not change the Display Choices, this will break the solution

3.1.7.2.3. Click OK

4. CUSTOMIZING FORMS AND PUBS

4.1. Click 

4.2. Click "Site settings"

4.3. Under PA Subsite Settings, click "Forms and Pubs Settings"

4.4. Click Forms and Pubs Options, this will allow you to change the frontend columns to be visible to the user

Forms and Pubs Options

Forms and Pubs Options for Webparts Subsite

(For mobile view you must hide three columns)

Name of 'Doc Num' Column:	<input type="text" value="Project #"/>
Hide 'Doc Num' column on mobile view:	<input checked="" type="checkbox"/>
Hide 'Doc Num' column on desktop view:	<input type="checkbox"/>
<hr/>	
Name of 'Title' Column:	<input type="text" value="Title"/>
Hide 'Title' column on mobile view:	<input type="checkbox"/>
Hide 'Title' column on desktop view:	<input type="checkbox"/>
<hr/>	
Name of 'Filter 1' Column:	<input type="text" value="Status"/>
'Filter 1' Dropdown Placeholder Text [ex: Select Document Type(s)]:	<input type="text" value="Status"/>
Hide 'Filter 1' column on mobile view:	<input type="checkbox"/>
Hide 'Filter 1' column on desktop view:	<input type="checkbox"/>
<hr/>	
Name of 'Filter 2' Column:	<input type="text" value="Category"/>
'Filter 2' Dropdown Placeholder Text [ex: Select Topic(s)]:	<input type="text" value="Category"/>
Hide 'Filter 2' column on mobile view:	<input type="checkbox"/>
Hide 'Filter 2' column on desktop view:	<input type="checkbox"/>
<hr/>	
Name of 'Field 1' Column:	<input type="text"/>
Hide 'Field 1' column on mobile view:	<input checked="" type="checkbox"/>
Hide 'Field 1' column on desktop view:	<input checked="" type="checkbox"/>
<hr/>	
Name of 'Field 2' Column:	<input type="text" value="Field 2"/>
Will this field be used to filter content?	<input type="checkbox"/>
Hide 'Field 2' column on mobile view:	<input checked="" type="checkbox"/>
Hide 'Field 2' column on desktop view:	<input checked="" type="checkbox"/>
<hr/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	


- 4.4.1. Fill out each column name to be what you would like (max 10 characters)
- 4.4.2. Fill out the dropdown text for each filter column (max 25 characters)
- 4.4.3. Select a column to hide on mobile (there can only be three)
- 4.4.4. Checkmark if you would like this column hidden on desktop and mobile
- 4.4.5. Checkmark if you would like Field 2 to be shown as a filter option

Note: Filter option '**Field 2**' **Dropdown Placeholder Text entry box** will be the name of the dropdown

- 4.4.6. Click Save



5. ADDING CONTENT TO THE APPLICATION

- 5.1. Go to the **subsite** you activated your features on

- 5.1.1. Click 
- 5.1.2. Click "Site contents"
- 5.1.3. Click select Forms and Pubs Content
 - 5.1.3.1. Fill out any information you would like to include. This is Rich HTML so you can add images, bolding, links, etc.

6. ADDING YOUR DATA

- 6.1. Go to the **subsite** you activated your features on

- 6.2. Click 
- 6.3. Click "Site contents"
- 6.4. Click FormsAndPubs
 - 6.4.1. Click  **new item**

6.4.2. Fill out the form (column names may vary depending on Section 1):

Title *	<input type="text"/>
DocNum *	<input type="text"/>
LinkUrl *	Type the Web address: (Click here to test) <input type="text" value="http://"/> Type the description: <input type="text"/>
Filter1	<input type="checkbox"/> Choice 1 <input type="checkbox"/> Choice 2
Filter2	<input type="checkbox"/> Choice 3 <input type="checkbox"/> Choice 4
Field1	<input type="text"/>
Field2	<input type="text"/>

6.4.3. Click Save

6.4.4. Repeat to add more data

7. NOTES

- 7.1. The URL will be in the authoring environment: https://auth-agency.pa.gov.com/sites/YourSiteName/YourSubsiteName/_layouts/15/formspubs/formsandpubs.aspx
- 7.1.1. Example: https://auth-agency.pa.gov.com/sites/DCNR/ParksandForests/_layouts/15/formspubs/formsandpubs.aspx
- 7.2. The URL for the production environment:
www.YourSiteName.pa.gov/YourSubsiteName/_layouts/15/formspubs/formsandpubs.aspx
- 7.2.1. Example:
www.dcnr.pa.gov/ParksandForests/_layouts/15/formspubs/formsandpubs.aspx
- 7.3. Do not change the type of column you are using except for Field 1 and Field 2
- 7.4. If you would like to see the changes on the production website, please allow for content deployment to run its course