

# MachForm in Pictures

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This document is designed to work with the “MachForm Exercises”, but you might find that reviewing the pictures alone is enough to help you get started!

## Table of Contents

Figure 1: Sign In Screen.....	2
Figure 2: Form Manager .....	3
Figure 3: Form Editor & Field Properties .....	4
Figure 4: Form Properties .....	5
Figure 5: Field Types .....	5
Figure 6: Configure Multiple Pages.....	6
Figure 7: Configure Checkboxes .....	7
Figure 8: Email Notifications.....	8
Figure 9: Email Confirmations.....	8
Figure 10: Entries Page .....	9
Figure 11: Processing an Entry.....	10
Figure 12: Reports (version 4 or higher).....	11
Figure 13: Entries Grid Report Widget.....	12
Figure 14: Deleting or Exporting Entries.....	13

Figure 1: Sign In Screen

MachForm

 **Sign In to Admin Panel**  
Sign in below to create or edit your forms

**Email Address**  
ldtech@yorku.ca

**Password**  
.....

Remember me

 Sign In

I forgot my password

If you forget your password:  
type in your email address,  
click this checkbox, and then  
click Sign In.

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# MACHFORM IN PICTURES

Figure 2: Form Manager



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Figure 3: Form Editor & Field Properties

The screenshot displays the MACHFORM Form Editor interface. At the top, a navigation bar includes 'Manage Forms', 'Edit Themes', 'Users', 'Settings', and 'My Account'. On the right, there are 'Sign Out' and 'Help' options. The main form is titled 'Eddy: Classroom Booking Request' with the instruction 'Use this form to request time in the classroom.' It features two input fields: 'Name \*' (split into 'First' and 'Last') and 'Employee Number \*' (with a character count: 'Must be 9 characters. Currently Entered: 0 characters.').

On the right side, a task pane is open, showing three tabs: 'Add a Field', 'Field Properties', and 'Form Properties'. The 'Field Properties' tab is active, displaying settings for a selected field:

- Field Label:** Name (with a callout 'Name the field' and 'Resize this box' pointing to the label area).
- Field Type:** Name (with a callout 'Change the field type').
- Name Format:** Normal (dropdown menu).
- Rules:** Includes a 'Required' checkbox (checked) with a callout 'Variations on this field type'.
- Field Visible to:** Radio buttons for 'Everyone' (selected) and 'Admin Only'.
- Guidelines for User:** A text area with a callout 'Learn more about this feature'.
- Custom CSS Class:** An empty text input field.

At the bottom of the form editor, there are four buttons: 'Save Form' (with a callout 'Save the form frequently!'), 'Add Field', 'Duplicate', and 'Delete' (with a callout 'Delete or duplicate the selected field.').

A large callout at the top right states: 'Use the task panes to add new fields, configure their settings, and configure the form itself.'

Figure 4: Form Properties



Figure 5: Field Types



# MACHFORM IN PICTURES

Figure 6: Configure Multiple Pages

The image shows a screenshot of the MACHFORM interface. On the left, a form titled "Lesson 2 start" is displayed. The form has a header area with three steps: "1 Contact Info", "2 Untitled Page", and "3 Untitled Page". Below the header are three input fields: "Name \*" (split into "First" and "Last"), "Employee Number \*" (with a note "Minimum of 9 characters required. Currently Entered: 0 characters."), and "Email \*".

On the right, the "Form Properties" panel is open. It has three tabs: "Add a Field", "Field Properties", and "Form Properties" (which is selected and circled). The "Form Properties" panel contains two sections:

- Pagination Header Style ?**: This section has three radio button options: "Complete Steps ?" (selected), "Progress Bar ?", and "Disable ?". A callout bubble points to this section with the text "Choose header style, or disable pages".
- Page Titles ?**: This section has a list of three items: "1. Contact Info", "2. Untitled Page", and "3. Untitled Page". Each item has a text input field next to it. A callout bubble points to the "2. Untitled Page" item with the text "Name each page".

Two callout bubbles provide instructions: "Click in the page header area to view the page properties" (pointing to the header area) and "Select another field to leave page editing mode" (pointing to the "Employee Number" field).

**Figure 7: Configure Checkboxes**

The screenshot shows the 'Field Properties' tab in the MACHFORM configuration tool. The field is labeled 'This event will require:' and is set to 'Checkboxes' type with 'One Column' choice columns. The 'Choices' section lists 'Computers', 'Study table', 'Catering', and 'Smart server'. The 'Computers' choice is selected by default. Below the choices is a 'bulk insert choices' button. The 'Choices Options' section has 'Allow Client to Add Other Choice' checked, with an 'Other' field. The 'Rules' section has 'Required' unchecked. The 'Field Visible to' section has 'Everyone' selected. The 'Guidelines for User' field contains 'Check all that apply.' and the 'Custom CSS Class' field is empty.

**Field Label** <sup>?</sup> 3  
This event will require:

**Field Type** <sup>?</sup> Checkboxes  
**Choice Columns** <sup>?</sup> One Column

**Choices** <sup>?</sup>

- Computers + -
- Study table + -
- Catering + -
- Smart server + -

bulk insert choices

**Choices Options**

- Allow Client to Add Other Choice <sup>?</sup>
- Other

**Rules**

- Required <sup>?</sup>

**Field Visible to**

- Everyone <sup>?</sup>
- Admin Only <sup>?</sup>

**Guidelines for User** <sup>?</sup>  
Check all that apply.

**Custom CSS Class** <sup>?</sup>

Make a choice selected by default

Add and remove choices

Paste in an existing list of choices

Figure 8: Email Notifications

**Send Notification Emails to My Inbox** ?

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**Your Email Address** ?  
LDTech@yorku.ca

**From Name** ?  
Name

**From Email Address** ?  
Email

**Email Subject**  
{form\_name} #{entry\_no}

**Email Content** ?  
{entry\_data}

Send Email in Plain Text Format

**i** You can insert template variables into the email template.

[hide options](#) ▲

*Annotations:*

- Your email address
- Form fields must be set as "required" for you to use them in emails.
- Choose the user's email so you can reply to them directly from your notification email.
- Template variables let you pull information from the form to use in your email subject or content.

Figure 9: Email Confirmations

**Send Confirmation Email to User** ?

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**User Email Address** ?  
Email

**From Name** ?  
→ Set Custom Name → Centre for Staff Development & Te

**From Email Address** ?  
→ Set Custom Address → LDTech@yorku.ca

**Email Subject**  
{form\_name} - Receipt

**Email Content** ?  
Dear Customer,  
  
We have received the form you submitted with the information below.  
Someone will follow up with you within three business days.  
  
{entry\_data}

Send Email in Plain Text Format

**i** You can insert template variables into the email template.

[hide options](#) ▲

*Annotations:*

- Set a custom name and address
- Using your email will allow the user to reply to the confirmation email



# MACHFORM IN PICTURES

Figure 10: Entries Page

The screenshot shows the 'Lesson 4 start' Entries page. At the top, there is a navigation bar with links for 'Manage Forms', 'Edit Themes', 'Users', 'Settings', 'My Account', 'Sign Out', and 'Help'. Below this, the page title 'Lesson 4 start ▶ Entries' is displayed, followed by the subtitle 'Edit and manage your form entries'. The main content area features a table of entries with columns for '#', 'Date Created', 'IP Address', 'Booked', 'Employee Num...', 'Name - First', 'Name - Last', and 'Email'. The table contains 15 rows of data. Callouts provide instructions: 'Delete or export selected records' points to the 'Delete' and 'Export' buttons; 'Find specific records' points to the 'Filter Entries' button; 'Choose which fields to see on this screen' points to the 'Select Fields' button; 'Select all records on the page' points to the first checkbox; 'Click on a record to view all of its data, and email or edit it' points to a row; 'Select a record to delete or export' points to a checkbox; 'View more pages of records' points to the pagination controls; and 'Sort the list' points to the 'Sort By' dropdown menu.

Lesson 4 start ▶ Entries  
Edit and manage your form entries

Delete Export Delete or export selected records

Filter Entries Select Fields Find specific records Choose which fields to see on this screen

#	Date Created	IP Address	Booked	Employee Num...	Name - First	Name - Last	Email
1		130.63.187.56	<input checked="" type="checkbox"/>	111222333	Charlie	Brown	ldtech@yorku.ca
2		130.63.187.230	<input type="checkbox"/>	123822605	Many	jane	yuta@yorku.ca
3	2 days ago	130.63.253.12	<input type="checkbox"/>	88788333	Donald	Duck	dduck@gmail.com
4	2 days ago	130.63.187.122	<input type="checkbox"/>	102102102	uckka	Cove	briania@icloud.co...
5	2 days ago	130.63.209.55	<input type="checkbox"/>	3897402503	Joan	Jett	joan@jett.com
6	2 days ago	130.63.65.74	<input type="checkbox"/>	211916005	Sarah	Garofalo	sgarofalo@yorku...
7	2 days ago	130.63.187.122	<input type="checkbox"/>	102102102	Anya	The greatest	amorea@yorku.ca
8	2 days ago	130.63.187.84	<input type="checkbox"/>	3897402503	Harry	Noname	hnoname@yahoo...
9	2 days ago	130.63.187.54	<input type="checkbox"/>	123457776	Daffy	Duck	dduck@hotmail.c...
10	2 days ago	130.63.187.54	<input type="checkbox"/>	222222222	Minnie	Mouse	mmouse@hotmai...
11	2 days ago	130.63.187.56	<input type="checkbox"/>	123456789	Harry	Connick Jr	harry@heyu.edu
12	2 days ago	130.63.209.55	<input type="checkbox"/>	553322567	Yo	Yong	yoyong@gmail.co...
13	2 days ago	130.63.187.56	<input checked="" type="checkbox"/>	931949328	Dre	Tom	dretom@dretom...
14	2 days ago	130.63.209.55	<input type="checkbox"/>	023156999	Sam	Adams	sadams@adams...
15	2 minutes ago	130.63.187.56	<input type="checkbox"/>	111222333	Linus	Van Pelt	linus@heyu.edu

1 2 View more pages of records

Sort By → Date Created

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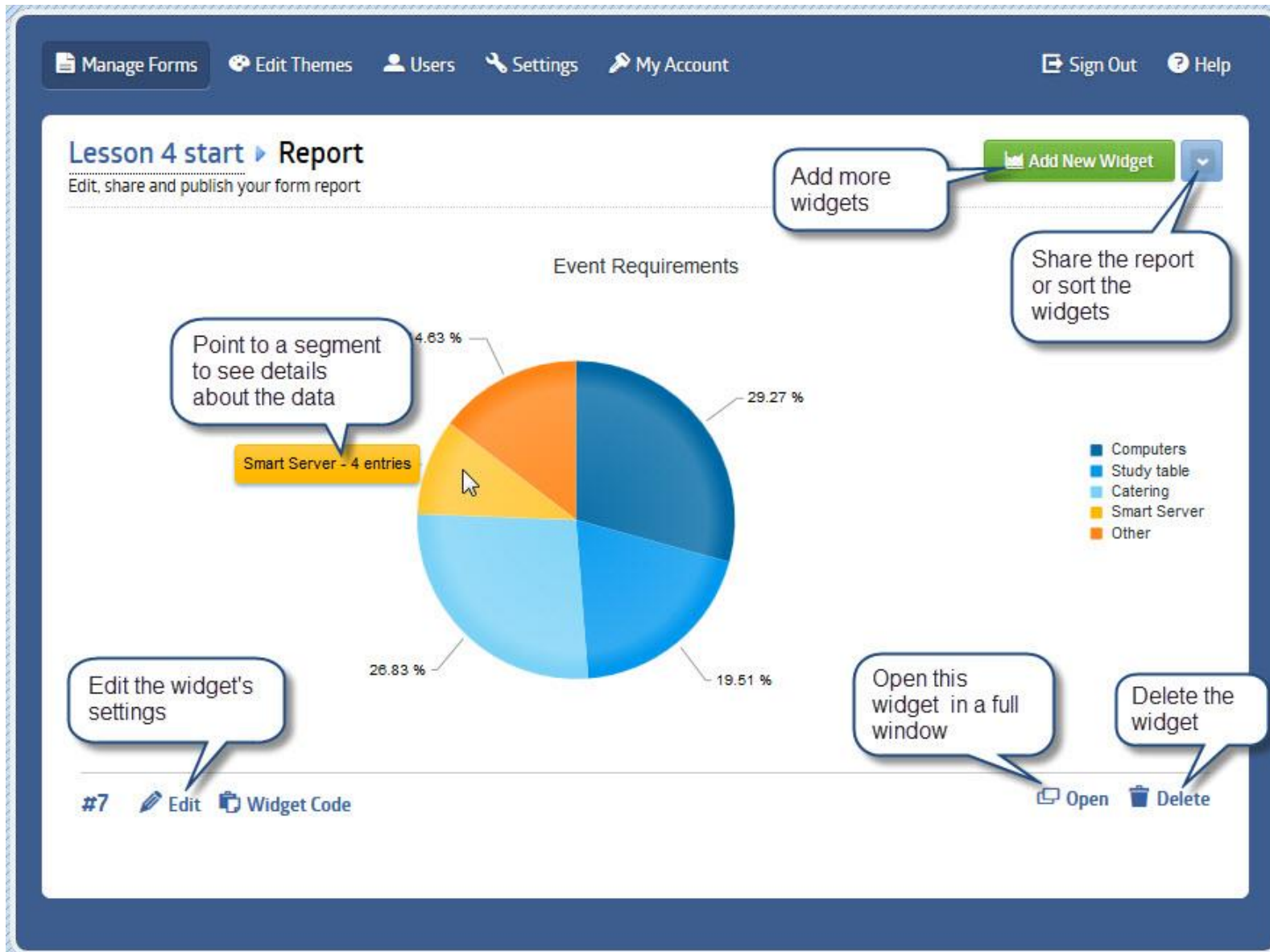
Figure 11: Processing an Entry

The screenshot displays the MACHFORM interface for processing an entry. The top navigation bar includes links for Manage Forms, Edit Themes, Users, Settings, My Account, Sign Out, and Help. The main content area shows the breadcrumb 'Lesson 4 start > Entries > #15' and 'Displaying entry #15'. A callout bubble points to the 'Entries >' link with the text 'Return to an earlier page'. On the right, a callout bubble points to navigation arrows with the text 'View previous / next entry'. Below the arrows is a callout bubble pointing to a menu of actions (Edit, Email, Print, Delete) with the text 'Take an action on this entry'. The entry details are as follows:

Booked?	
Employee Number	111222333
Name	Linus Van Pelt
Email	linus@heyu.edu
Organization	Glendon College
Event Title	Blanket Symposium
This event will require:	<input checked="" type="checkbox"/> Computers <input checked="" type="checkbox"/> Catering <input checked="" type="checkbox"/> washing machine
Room Capacity	8
Date Required	Sep 26, 2014
I agree to the user agreement:	<input checked="" type="checkbox"/> Yes
Comments	
<b>i</b> Entry Info	
Date Created	26 Sep 2014 - 11:18:46 AM
Date Updated	
IP Address	130.63.187.56

# MACHFORM IN PICTURES

Figure 12: Reports (version 4 or higher)



# MACHFORM IN PICTURES

Figure 13: Entries Grid Report Widget

The screenshot shows a web-based report titled "Classroom Requests". At the top left, there is a filter dropdown menu currently set to "Booked". Below this is a table with columns: ID#, Date Created, Booked, Employee Number, Name - First, Name - Last, and Email. The table contains four rows of data. A context menu is open over the "Email" column header, showing options for "Sort Ascending", "Sort Descending", and "Columns". At the bottom of the table, there are navigation controls including a page indicator (1), a dropdown for "100 items per page", and a status "1 - 16 of 16 items". Below the table are buttons for "#8", "Edit", and "Widget Code". At the bottom right, there are buttons for "Open" and "Delete".

Drag field names here to add grouping levels

Click the twisty to hide/show groups

Click column labels to sort

Choose columns to display

Page through items

Edit settings

Open in a new window, or delete widget

ID#	Date Created	Booked	Employee Number	Name - First	Name - Last	Email
16	26 Sep 2014 11:20 AM		999888777	Calvin	Hobbes	chobbes@heyu.edu
15	26 Sep 2014 11:18 AM		111222333	Linus	Van Pelt	linus@heyu.edu
14	24 Sep 2014 10:44 AM		023156999	Sam	Adams	sadams@adams....
12	24 Sep 2014 10:44 AM		822567	Yo	Yong	yoyong@gmail.com

**Figure 14: Deleting or Exporting Entries**

**Lesson 4 start ▶ Entries**  
Edit and manage your form entries

Delete or export the selected entries

If you don't select any entries, Export will export **all** of the form entries

Delete Export

Filter Entries Select Fields

<input type="checkbox"/>	#	Date Created	IP Address	Booked	Employee Num...	Name - First	Name - Last	Email
<b>All 15 entries on this page are selected. <a href="#">Select all 16 entries in this form</a></b>								
<input checked="" type="checkbox"/>			130.63.187.56		999888777	Calvin	Hobbes	chobbes@heyu.e...
<input checked="" type="checkbox"/>	15	3 hours ago	130.63.187.56		111222333	Lin		linus@heyu.edu
<input checked="" type="checkbox"/>	14	2 days ago	130.63.209.55		023156999	Sa		sadams@adams...
<input checked="" type="checkbox"/>	13	2 days ago	130.63.187.56	<input checked="" type="checkbox"/>	931949328	Dr		dretom@dretom...
<input checked="" type="checkbox"/>	12	2 days ago	130.63.209.55		553322567	Yo	Yong	yoyong@gmail.co...
<input checked="" type="checkbox"/>			130.63.187.56		123456789	Harry	Connick Jr	harry@heyu.edu
<input checked="" type="checkbox"/>			130.63.187.54		222222222	Minnie	Mouse	mmouse@hotmail...
<input checked="" type="checkbox"/>		3 days ago	130.63.187.54		123457776	Daffy	Duck	dduck@hotmail.c...
<input checked="" type="checkbox"/>	8	3 days ago	130.63.187.84		3897402503	Harry	Noname	hnoname@yahoo...
<input checked="" type="checkbox"/>	7	3 days ago	130.63.122.245		102102102	Anya	The greatest	amorea@yorku.ca

Select all entries on the page

Once you select all entries on the page, you get the option to select all entries in the form

Or select individual entries