Gather and Analyze Data with Liferay DXP

Exercises Script

# Exercise 1: Slides

Slide 25:

In this Exercise, we’ll Create Forms to use on the Marvin Robotics platform.

Slide 26:

We have the following Objectives for this exercise. We will:

Create an Element Set

And, create two New Forms: a Customer Satisfaction Survey and a New Product Interest Form

Slide 27:

These are the steps we have for this exercise:

Create a New Element Set

Add Fields to the Element Set, including Email Validation and Confirmation

Create a Form Using the Element Set

Create the Customer Satisfaction Form

Add Single Selection, Multiple Selection, and Text Fields to the Form

Add a Second Page to the Form

Format the Success Page

Create a New Product Interest Form and Add Fields to the Form

Slide 28:

Additionally, we have two bonus exercises which we won’t cover in this video, but you can complete them on your own. These are:

Create a new Form on the main Marvin Robotics Site for gathering feedback from employees. The Form should be at least two pages long with no more than five fields on a page.

Create an Element Set for commonly asked questions about customer experience and satisfaction. Use the Element Set to create a Returning Customer Satisfaction Form.

# Exercise 1: Content

Part 1:

First up, we need to make sure we’re signed into our Marvin Robotics platform as an Administrator. If you followed the prerequisites, this will be with the [test@marvinrobotics.com](mailto:test@marvinrobotics.com) account.

Once signed in, open the *Site Menu* and click the *Site Selector*, which is this compass icon.

Click the *My Sites* tab and select the *Marvin Robotics* Site. Depending on how many Sites you’ve made and visited, you might find the *Marvin Robotics* Site under the Recent tab, as well.

Once that is opened, navigate to *Content & Data > Forms* in the *Site Administration* panel.

Click the *Element Sets* tab, and then click the *Add* icon near the top right of the page.

Click the *Untitled Form* field to edit the title and type “Webinar RSVPs” as the Title.

Type “RSVP for the upcoming Marvin Robotics Webinar.” as the description.

Part 2:

Next, we’ll add Text Fields to the Element Set.

Open the Builder sidebar if it is not already open.

Drag a *Text* field onto the page.

Type “First Name” under *Label* in the sidebar and click the *Required Field* toggle.

Click the Back arrow to return to the Builder menu.

Drag another *Text* field onto the page below First Name.

Type “Last Name” under *Label* and click the *Required Field* toggle.

Click Back.

Drag one more *Text* field onto the page below Last Name.

Type “Department” as the *Label*.

Click Back.

Part 3:

We also need to add validation and confirmation field elements to make sure that Users enter a correct and valid email address.

Start by dragging a *Text* field onto the page below the Department field.

Type “Email” under *Label* and click the *Required Field* toggle.

Next, click the *Advanced* tab at the top next to *Basic* and scroll down to view available options.

Click the *Require Confirmation* toggle.

Type “The emails do not match” as the *Error Message.*

Below that, click the *Validation* toggle.

Choose “Is an email” from the drop-down menu under *Accept if Input*.

Type “Please enter a valid email address” as the *Error Message*.

Click *Save* at the bottom of the page and then click the Back arrow at the top next to New Element Set to leave the editor.

Part 4:

Now that we’ve created an Element Set, we’ll draft a Form using that Element Set.

Click the *Forms* tab next to *Element Sets*.

We don’t have any forms yet, so to add one click either the *Add* button at the top right or *New Form* button here at the center.

Type “New Webinar” as the *Title*.

Click the *Element Sets* tab in the *Builder* sidebar. You may need to open it using the button.

Drag the “Webinar RSVPs” *Element Set* onto the Form page.

Click the *Preview* button at the top. This should open the Form in a new tab. We can click on that tab and check all of our fields to see the required fields, validation, and confirmation we established in the Element set.

For instance, skipping a required field turns it red. And, if I type in an incomplete email address and neglect to add the confirmation, we’ll get our error messages. [Demonstrate incorrect answers.]

Once we’ve checked all of the fields, we can close the tab.

For now, we’ll simply click *Save* to save the Form as a draft. We will complete and publish forms in the next part of this exercise.

Part 5:

Next, we’ll create a Marvin Robotics Customer Satisfaction Survey.

Open the *Site Menu* and click the Site Selector.

Click the *My Sites* tab and select the *Marvin Robotics Store* Site.

Go to *Content & Data > Forms* in the *Site Administration* panel.

Click the *Add* or *New Form* button to add a new Form.

Click the *Untitled Form* field to edit the Form title and type “Customer Satisfaction Survey” as the title.

Type “The official customer satisfaction survey for Marvin Robotics customers.” as the description.

For our first page, type “Product Satisfaction` as the Page title.

Type “How satisfied are you with Marvin Robotics Products?” as the page description.

Part 6:

Now, we’ll add some *Single Selection* Fields to the Form.

Click the *Builder* icon near the top right if the *Builder* does not automatically open.

Drag a *Grid* field onto the Form. This field will allow us to list multiple questions as the rows and the possible answers as the columns.

Type “How satisfied are you with:” under *Label*.

For the first row option, type “The delivery of Marvin Robotics Products” and for the second, type “The quality of Marvin Robotics Products.”

Now we’ll add the column options.

Type “Very satisfied” for the first column option, “Somewhat satisfied” for the second option, “Neutral” for the third, “Somewhat dissatisfied” for the fourth, and “Very dissatisfied” for the last option.

Click the *Required Field* toggle to make this a required question.

Click the *Back* arrow beside *Grid* to return to the Field menu.

Part 7:

Next, we’ll add *Multiple Selection* and *Text* Fields to the Form.

Drag a *Multiple Selection* field onto the Form.

For the *Label*, type “Which Marvin Robotics Product would you purchase again?”

For the four options, type “TS2-100 Robotic Machine,” “TS2-40 Robotic Machine,” “CS9 Controller,” and “FastPickerTP8.”

Click Back.

Drag a *Text* field onto the Form below the *Multiple Selection* field

Type “What product or service do you like best?” as the Label.

Select *Multiple Lines* so that customers can leave longer answers.

Then, click Back.

Drag another *Text* field onto the Form.

Type “What product or service could be improved?” as the *Label* and again select *Multiple Lines*.

Click Back.

Part 8:

Now, we’ll add a Second Page for Customer Service Satisfaction Questions

Click the *New Page* button below the “Product Satisfaction” page.

Type “Customer Service Satisfaction” as the Page title and “How is our Customer Service team doing?” as the page description.

Drag a *Single Selection* field onto the Form.

Type “How do you rate our customer communication?” as the *Label*.

We’ll add four options. Type “Excellent” as the first option, “Good” as the second, “Neutral” as the third, and “Needs Improvement” as the fourth option.

Click the *Required Field* toggle, then click Back.

Drag a *Text* field onto the Form and type “How can we better serve you?” as the *Label*.

Select *Multiple Lines.*

Part 9:

The last thing we need to do is format the *Success Page.*

Click on “Thank you.” under *Success Page* and replace it with “Success!”

Beneath that, replace the default text with “Your feedback is valuable to us. Thank you for filling out this survey.”

Now that we’re finished, click the *Publish* button at the top right.

You’ll see a success message pop-up in the bottom left, and we can click the *Open Form* button to view the complete form. You can also click the *Share* button, which is unavailable for unpublished forms, to find the survey link and to share it with customers.

Part 10:

Once we’re done looking over the Customer Satisfaction Survey, close those tabs and click the *Back* arrow beside *Edit Form* to return to our main Form page.

We’ll now add another new form for New Product Interest.

Click the *Add* icon near the top right and type “New Product Interest” into the *Untitled Form* field.

Type “Help Marvin Robotics move forward.” as the description.

Part 11:

First up, we’ll add *Text* Fields to the Form.

Open the *Builder* icon near the top right if it does not automatically open.

Drag a *Text* field onto the Form and type “How have Marvin Robotics products met your manufacturing needs?” for the *Label*.

Select *Multiple Lines* to allow customers to write more and click the *Required Field* toggle.

Click the *Back* arrow by *Text*.

Drag another *Text* field onto the Form below the first.

Type “What manufacturing needs are not currently met by Marvin Robotics products?” as the *Label*.

Like before, select *Multiple Lines* and click the *Required Field* toggle.

Click Back.

Part 12:

We’ll add two more fields to our New Product Interest Form.

First, drag a *Multiple Selection* field onto the Form.

Type “What improvements would you like to see in future Marvin Robotics products?” as the *Label*.

For the six options, type “Increased Load,” “Increased Range of Motion,” “Faster Movement Speed,” “Smaller Footprint,” “Lower Cost,” and “Other.”

Click the *Required Field* toggle.

Click Back.

Next, drag a *Text* field onto the Form.

Type “List any additional improvements, recommendations, or comments for Marvin Robotics Products.” as the *Label* and select *Multiple Lines*.

Click *Publish* at the top.

If we click the *Open Form* button in the *Success Message* or access the link using the *Share* button, we can see the newly created form.

*(End of Video 1)*

# Exercise 2: Slides

Slide 36:

In this exercise, we’ll demonstrate how to Gather and Analyze Feedback using the forms we created on the Marvin Robotics Platform.

Slide 37:

Our Objectives for this exercise are to:

Submit Entries for the Customer Satisfaction Survey

View Entries for the Customer Satisfaction Survey

Export Entries from the Customer Satisfaction Survey

Slide 38:

We’ll take the following steps:

Add the Customer Satisfaction Survey to the Marvin Robotics Store Site

Make Ford Dent and Tricia McMillan Members of the Marvin Robotics Store Site

Fill out the Customer Satisfaction Survey as Ford Dent

Fill out the Customer Satisfaction Survey as Tricia McMillan

View the Form Entries for the Customer Satisfaction Survey

Export the Form Entries

Slide 39:

There are also two Bonus Exercises you can complete on your own after the video:

Add the New Webinar Form created in the previous exercise to a page on the Marvin Robotics Site and fill out the form as Bea Bullbruchs, Arthur Prefect, and Mary Jennings using their User information.

View the form entries for the New Webinar Form and edit the email address for Mary Jennings to be [majennings@marvinrobotics.com](mailto:majennings@marvinrobotics.com).

# Exercise 2: Content

Part 1:

In order to effectively use our Customer Satisfaction Survey, we need a way for customers to complete it. We’ll accomplish this by adding the survey to the Marvin Robotics Store Site.

As usual, make sure to sign in to the Marvin Robotics platform as an Administrator.

Open the *Site Menu* and click the *Site Selector*, the compass icon, to change Sites.

Click the *My Sites* tab and select the *Marvin Robotics Store* Site.

Click the Add, or plus, icon at the top right of the page to the left of the *Global Menu* to open a Menu of Widgets and Content that can be added to our main *Marvin Robotics Store* page.

Drag and drop a *Form* widget onto the top of the page.

Click the *Select Form* link and choose the *Customer Satisfaction Survey.*

Click *Save* and close the pop-up.

You can see that the *Customer Satisfaction Survey* now shows up on the main page.

Part 2:

Next, we need to collect responses from some of our customers. To do this, we need to make sure any Users we want to take the survey are members of the *Marvin Robotics Store* Site. If you followed along with the prerequisites, you should have two Users, Ford Dent and Tricia McMillan, added to the platform with their passwords set to test and email verification turned off. Make Ford Dent and Tricia McMillan Members of the Marvin Robotics Store Site

Start by opening the *Global Menu* and going to “Users > Users and Organizations” in the *Control Panel*.

Click *Ford Dent* and then open the *Memberships* tab on the left of the screen.

Click the *Select* button across from Sites and choose *Marvin Robotics Store*.

Click *Save*.

Click the *Back* arrow next to *Edit User Ford Dent.*

Next, select *Tricia McMillan* and, once again, open the *Memberships* tab on the left of the screen.

Click the *Select* button next to Sites and choose *Marvin Robotics Store*.

Click *Save*.

Part 1:

Now that our Users have membership to the *Marvin Robotics Store* Site, they can complete the Survey.

First, we need to sign out of our administrator account and sign in as Ford Dent.

Open the *Personal Menu*, which is the icon at the top right next to the *Global Menu*, and click *Sign Out* at the bottom.

Once the page refreshes, click *Sign In*.

We’ll now sign in as Ford Dent using the email address and password we established earlier. This should be [fdent@marvinrobotics.com](mailto:fdent@marvinrobotics.com) and *test*.

Click *I Agree* when prompted.

Next, we’ll need to reset the password. Use something easy to remember. Click *Save*. Then we need to set a reminder query. We’ll use the default question and for simplicity type *Test* for the answer. And click *Save*.

Now that we’re logged in as Ford, open the *Personal Menu*.

Click *My Sites* in the menu and then the *My Sites* tab in the pop-up. Choose *Marvin Robotics Store*.

Fill out both pages of the *Customer Satisfaction Survey* that we added to the top of the page. [Read aloud any answers and selections you provide as you click through them.]

And, when you’re finished, click Submit.

Part 1:

Now, we want to fill out the survey as Tricia McMillan.

Like before, we’ll open the *Personal Menu* and sign out. This time, we’ll sign in as Tricia using the email and password we set up earlier. This should be [tmcmillan@marvinrobotics.com](mailto:tmcmillan@marvinrobotics.com) and *test*.

Click *I Agree* to the placeholder terms and conditions.

We’ll reset Tricia’s password. Click *Save*. And we’ll set a reminder query and click *Save.*

Once we’re logged in, open the *Personal Menu* and click My Sites.

Click the *My Sites* tab in the pop-up and choose *Marvin Robotics Store.*

Just like before, fill out the *Customer Satisfaction Survey* on the top of the page. [Use some different answers and read off the answers as you input them.]

Click *Submit* when you’re finished.

And then we’ll go back to the *Personal Menu* and sign out of Tricia’s account.

Part 1:

Now that we have some Form Entries for our Customer Satisfaction Survey, we’ll view those as our Administrator.

Sign in once again as the Administrator.

Open the *Site Menu* and click the *Site Selector*.

Click the *My Sites* tab and open the *Marvin Robotics Store* Site.

Go to Content & Data > Forms in the *Site Administration Panel*.

Click the *Actions* icon, which is the three dots, next to *Customer Satisfaction Survey*, and click *View Entries*.

You can see an overview of all the survey responses. To look at an individual response, we can use the *Action* icon next to the specific entry.

So, we’ll click the three dots next to Ford Dent's entry and click *View*. Now we can see the answers we submitted as Ford Dent.

Click *Back* at the top.

Now we’ll look at Tricia McMillan’s entry by, again, clicking the *Actions* icon and choosing *View*. Now we can see all of Tricia’s answers.

Click *Back* to return to the list.

Part 1:

Next up, we want to export the *Form Entries* to use elsewhere.

We’ll click the *Back* arrow next to *Form Entries* at the top of the page to return to the list of all our forms.

Open the *Actions* icon next to *Customer Satisfaction Survey* and click *Export.*

For the *File Extension,* choose *XML*. Then click OK.

Depending on your browser, the file may automatically download or you may have an additional pop-up asking you what you want to do with the file. [Demonstrate/explain opening the downloaded file.]

*(End of Video 2)*