Using Gravity Forms
FOR ENTERPRISE WORDPRESS ADMINISTRATORS

Using Gravity Forms

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Quick Start

Getting Started
This guide covers Gravity Forms which is a WordPress plugin that allows WordPress Administrators to create Web forms to collect information from Web site visitors.

System Requirements
WordPress 3.5.1 is supported by both Macintosh and Windows operating systems.

Browser Requirements: Microsoft Internet Explorer 9 (or later version), Mozilla Firefox, Apple Safari, or Google Chrome

Contact Information
The Center for Learning & Professional Development
training@nmsu.edu
575-646-7444

Additional Information is provided at:
http://wptraining.nmsu.edu
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Getting Started

First Concepts and About Gravity Forms

This section is designed to establish a basic understanding of how Gravity Forms can be used and limitations in using Gravity Forms to collect information from site visitors.

In this section you will learn about common situations where Gravity Forms can be used to meet specific Web site goals, how to avoid collecting information that violates NMSU policy or other regulations, and how to set general configuration options when using Gravity Forms.

LEARNING OBJECTIVES

Upon completion of this section, you will be able to:

- Identify appropriate use cases for Gravity Forms
- Identify data that should not be collected using Gravity Forms
- Access Gravity Forms
- Understand the general settings available in the Gravity Forms menu
About Gravity Forms

Gravity Forms is a premium license WordPress Plugin used to create Web site forms in order to collect information from site visitors and send details about form submissions via email. The plugin is installed on NMSU Enterprise WordPress and activated at the network level. Certain Gravity Forms configuration options are controlled by the NMSU Enterprise WordPress Administrator.

Great Things about Gravity Forms

1. It's easy to learn
2. It can increase productive communication with your Web site visitors
3. It's simple, yet flexible
4. Works well with the NMSU WordPress theme

What can I do with Gravity Forms?

The good news is that you can use Gravity Forms to create highly customizable online forms without any knowledge of programming.

Use gravity forms for specific and department-related activities. Use Gravity Forms to:

- Replace standard email requests to get more specific details and increase productivity
- Help users to consume specifically targeted content

Gravity Forms Usage Guidelines

Before creating the form, always seek approval if you are collecting user information for the purpose of conducting a survey or other form of research.

Contact the Institutional Review Board (IRB) for additional information.

http://research.nmsu.edu/compliance/IRB/IRB.html
Don’t use Gravity Forms to:

- Transmit sensitive data/regulated data because it is prohibited by data-privacy regulations (e.g. FERPA, FISMA, HIPAA, GLBA, PCI, etc.). Regulated data should always be sent using a secured method (i.e. encryption).
- Transmit personally identifiable information (PII) that could result in identity theft.
- Transmit sensitive authentication data.
- Replace or supplement data collected and stored through other means (hiring system, student recruitment or registration system). Don’t create data silos!
- Accept payment for products or services.
  - Use ShopCart or the ShopCart API (http://shopcart.nmsu.edu/)

Don’t solicit this type of data:

- Social Security Number or taxpayer id
- Date of Birth
  - You can ask if the visitor is over 18
- Credit Card Number or other personal financial information
- Passwords or desired passwords
- Race
- Gender or sex
- Religion
- National origin
- Personal health information

When in doubt about the data you are collecting, contact the IT compliance officer at compliance@nmsu.edu.

Other Cautions

All WordPress site administrators will be able to see the data even if they are not receiving email notifications.

Most Web sites on the NMSU Enterprise WordPress are not encrypted. This means that data that is passed to the site can be seen by a third party.
Accessing Gravity Forms

Unlike many of the Plugins available in NMSU Enterprise WordPress, the Gravity Forms plugin is automatically activated.

The Gravity Forms menu item is available to all site Administrators and Editors and is located in the WordPress Administration menu on the site Dashboard.

---

**WORKOUT: Access Gravity Forms**

1. Log on to your NMSU Enterprise WordPress Admin Dashboard
   For example: [http://yoursite.nmsu.edu/wp-admin](http://yoursite.nmsu.edu/wp-admin)

2. From the WordPress Admin menu, select **Forms**.
Gravity Forms Menu

The Gravity Forms menu display a list of options that allow you to access different parts of the Gravity Forms plugin. The features of each menu item are indicated below:

- List of Forms
- Create a New Form
- View Form Entries
- Settings for all Forms
- Import Gravity Forms or export forms or form data
- Gravity Forms FAQ and Documentation
The Gravity Forms Dashboard widget can be used to quickly read entries.
Creating a Basic Form

Let’s start with a basic example.

Before jumping into creating advanced forms we will build a basic form and configure minimal settings required to make the form function. In this section you will learn how to create a few basic form fields and modify the basic settings for the fields. By the time you are complete with this section you will have a fully functional form that we can modify to meet specific needs and add additional functional and appearance options.

LEARNING OBJECTIVES

Upon completion of this section, you will be able to:

Create basic form fields
Modify form settings for an individual form
Modify form confirmations
Modify form notifications
Preview a form
Add a form to a post or a page
Create a Basic Form

In this exercise we will create a basic form to accept user input and send an email.

Create a New Form

1. Click New Form from the Forms menu. Optionally, you can also click Add New from the Form list screen.

2. Enter the Form Title and Form Description as appropriate.

3. Click Create Form. The Form Editor Screen will display.

Additional information about creating Forms: http://www.gravityhelp.com/documentation/page/New_Form
Add Form Fields
Add a Single Line Text field

1. From the Form Editor Screen, select the Single Line Text option under Standard Fields.

2. Point to the new form field and click the Edit button.

3. Type the name of the field in the field label.
   In this case type Name.

4. Type the field description in the description field.
   In this case type: Please input your full name

5. Under Rules, click the Required checkbox.
   This will make the form field required in order to submit the form.
Add another single line text field

1. From the Form Editor Screen, select the **Single Line Text** option under Standard Fields.

2. Point to the new form field and click the down arrow button.

3. Type the name of the field in the **field label**
   In this case type **Email**

4. Type the **field description** in the description field.
   In this case type: **Please enter your email address**

5. Under Rules, click the **Required** checkbox
   This will make the form field required in order to submit the form.
Add a Paragraph Text field

1. From the Form Editor Screen, select the **Paragraph Text** option under Standard Fields.

2. Point to the new form field and click the down arrow button.

3. Type the name of the field in the **field label**
   In this case type **Reason for Request**.

4. Type the **field description** in the description field.
   In this case type: **Please indicate the reason for your request.**

5. Under Rules, click the **Required** checkbox
   This will make the form field required in order to submit the form.

Additional information about the Form Editor:
http://www.gravityhelp.com/documentation/page/Form_Editor
## Common Form Properties

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Label</td>
<td>The label associated with a field that the visitor will see when filling out the form.</td>
</tr>
<tr>
<td>Description</td>
<td>The description of the field that the visitor will see. This field should provide additional information to help the visitor provide appropriate information.</td>
</tr>
<tr>
<td>Maximum Characters</td>
<td>The total number of characters (including spaces) that will be accepted for this field. Setting this value will help decrease security risks.</td>
</tr>
<tr>
<td>Required</td>
<td>This option makes the field required in order to submit the form.</td>
</tr>
<tr>
<td>No Duplicates</td>
<td>This prevents the user from entering information that already exists for this field in the database of previous entries.</td>
</tr>
<tr>
<td>Admin Label</td>
<td>This field allows you to use a different label for the field when viewing the completed entries.</td>
</tr>
</tbody>
</table>
**Modify Form Settings**

Use the form settings to determine basic form attributes.

1. **From the Form Editor, click **Form Settings**

   ![Form Editor]

   - **Name**: [input field]

2. **Under Form Options, click the **Enable animations** option**

   ![Form Options]

   - **Enable anti-spam honeypot**
   - **Enable animations**

   ![Update Form Settings]

3. **Click **Update Form Settings**

Additional information about Form Settings:

http://www.gravityhelp.com/documentation/page/Form_Settings
Modify Confirmations
Modify the confirmations to include custom text or determine where a visitor will go after the form has been submitted.

1. Under Form Settings, click **Confirmations**

![Form Settings](image1)

2. Click the **Edit** button under the **Default Confirmation**

![Confirmations Table](image2)

3. Click the **Merged Tags** button and add the **Name** field to the message.

![Merged Tags](image3)
4. Click the Enter key on your keyboard to create the space for the Name merged tag like so:

![Example of Name merged tag](image)

5. Click **Save Confirmation**

**Other Confirmation Type Options**

In addition to using the Text confirmation type you can also use the Page or Redirect confirmation types.

**Page Confirmation Type** – This option is used to point to a page in your WordPress site. This page may contain information about the post-request process or it may be used to simply thank the user for submitting the form. The benefit of using the Page confirmation type is that you can more easily create a full page of formatted content, including images and other multimedia, using the standard page authoring methods in WordPress. Since the Text confirmation type doesn't contain a visual editor (with Word processor-like controls) you would need to take extra steps to add the HTML code to the text confirmation message. The drawback of using the page confirmation type is that you will not be able to use merged tags using the NMSU WordPress theme.

**Redirect Confirmation Type** – This option allows you to send the user to any page on the Web, whether the page is located in your site or not.

For the Page and Redirect confirmation type an option is available to “Pass Field Data Via Query String”. This allows you to use parameters and dynamically populated fields in your forms. See chapter 3 for additional information about allowing fields to be dynamically populated.

Modify Notifications
Before we can add this form to a page or post on our site and begin accepting user input, we need to modify the Form Settings in order to set-up proper routing of the form.

1. Under Form Settings, click Notifications

![Form Settings]

2. Click the Edit button under the Admin Notification

![Notifications]

3. Change the Send to Email to your email address

![Form settings]

4. Click Update Notification

Additional information about Notifications:
http://www.gravityhelp.com/documentation/page/Notifications
Preview a form
Before adding the form to a WordPress Page or Post we should test the form to make sure it functions properly.

1. From the Form Editor screen, click Preview

The form preview will open in a new window

2. Complete the form to test the functions of the form.

3. Click Submit to test the form.

Note

The form preview does not show the form in context of your site and it does not display all form styles that are part of the NMSU WordPress Theme.

If you submit the form it will send an email confirmation and record the submission as an entry in WordPress.
Adding a form to a WordPress Page or Post

1. Create a Page/Post or select an existing page/post into which the form will be embedded.

2. Click the **Add Form** button

3. Select the form to insert from the drop down list

4. Click the corresponding check boxes if you want the form title and description to display on the page.

5. Click **Enable AJAX** to allow specialized scripts that enhance the user interface.

Additional information about adding forms to pages and posts:

http://www.gravityhelp.com/documentation/page/Embedding_A_Form
Creating Advanced Forms

Working with Advanced Forms.

Now that you have learned about the process of creating a basic form and basic form fields we can now improve the form to make it better meet your needs and provide added functionality and advanced visual design.

This section you will learn about the difference between basic fields and advanced fields in Gravity Forms and how to create and manage advanced fields and advanced form options to provide better functions and appearance options.

learning objectives

Upon completion of this section, you will be able to:

Create advanced form fields

Set advanced field properties

Use advanced form styling

Understand options for security and spam protection
Using advanced fields

Creating a name field

In this activity we will create an advanced field use specifically for names. The attributes of this field are fairly similar to the single line text fields used before but the advanced fields have options for specific data types that may be useful when collecting user input.

1. From the Form Editor screen, click Advanced Fields

2. Click Name from the Advanced Fields option area

3. Click the down arrow button to modify the Name field properties.

4. From the Name Format drop-down list, select the name format that is most appropriate for your data collection needs.
   
   *Note: Capturing the First and Last name using Normal may help if trying to use this data later. Separation of combined values often provides more flexibility if attempting to use the data later.*
Creating an Email field

In this activity we will create an advanced field use specifically for email addresses. The attributes of this field are fairly similar to the single line text fields used before but the advanced fields have options for specific data validation to ensure that a validly formatted email address is entered and provides an option for the user to confirm the accuracy of the email address being entered.

1. From the Form Editor screen, click Advanced Fields

2. Click Email from the Advanced Fields option area

3. Click the down arrow button to modify the Email field properties.

4. Click Enable Email Confirmation. 
   Note: This option prompts the user to enter their email address twice to ensure that it was properly entered.
Deleting Fields

After you have added the new name and email field you can remove the previous single line text fields used for this purpose.

To delete a field, click on the X button in the field header.

Click **OK**, to confirm.

Note

*When you delete a field all of the data associated with the field will be lost. If storing old submission data is important to you, you should consider downloading the entries before deleting fields to keep record of the information submitted.*

See *Chapter 4: View and Manage Form Entries* for additional information about how to save submitted data.
Creating a List field

We will now create a list field to allow the user to indicate additional contacts that will be added to the contact list as part of this request.

1. From the Form Editor screen, click **Advanced Fields**

2. Click **List** from the Advanced Fields option area

3. Click the down arrow button to modify the List field properties.

4. Click **Enable Multiple Columns**.
   Note: This option allows the user to include more than one column of information in the list.

5. Change Column 1 to **Name**

6. Change Column 2 to **Email**

7. Delete Column 3 by clicking the minus sign

Additional information about Advanced Fields:

http://www.gravityhelp.com/documentation/page/Form.Fields
**Using Polls**

Polls can be used to collect information from site visitors. When using the Poll type question you enable a specialized Poll results display that you can configure to display to Web site visitors or only to WordPress site Administrators.

In order to use the Poll features you must activate the Gravity Forms Polls Add-on.

1. From the Admin Dashboard, select **Plugins**
2. Locate the Gravity Forms Polls Add-on
3. Click **Activate**.

<table>
<thead>
<tr>
<th>Add-On</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gravity Forms Picatcha Add-On</td>
<td>Integrates Gravity Forms with Picatcha, enabling user</td>
</tr>
<tr>
<td>Gravity Forms Polls Add-On</td>
<td>Polls Add-on for Gravity Forms</td>
</tr>
<tr>
<td>Gravity Forms Quiz Add-On</td>
<td>Quiz Add-on for Gravity Forms</td>
</tr>
</tbody>
</table>
Creating a poll question

1. From the Form Editor screen, click **Advanced Fields**

2. Click **Poll** from the Advanced Fields option area

3. Click the down arrow button to modify the Poll field properties.

4. Click **Bulk Add/Predefined Choice**.
   
   Note: This option allows the user to include standard choices or provides an option to copy and paste an existing list of options.

5. From the Predefined Choice Category, choose **Satisfaction**

6. Click **Insert Choices**

Poll Results

To view the Poll Results, click **Poll Results**
Polling Settings

1. To modify Poll settings, click Polls from the Form Settings drop down menu.

2. Change the options as appropriate

Polls Form Settings

3.
- Display results of submitted poll fields
- Show link to view results
- Show percentages
- Show counts

Style:

Green

Repeat Voters

- Don’t block repeat voting
- Block repeat voting using cookie

Update Form Settings
Using Advanced Field options

Advanced Form formatting
You can use the CSS Class name Advanced option to set-up the form layout.

Click the ellipses to see the CSS Ready classes

Using NMSU-specific CSS
Optionally, you can use a specific CSS class.

Manually insert the code as:

<table>
<thead>
<tr>
<th>CSS Class Name</th>
<th>Other Likert Sizes</th>
</tr>
</thead>
<tbody>
<tr>
<td>gf_likert_30</td>
<td>gf_likert_90</td>
</tr>
<tr>
<td>gf_likert_40</td>
<td>gf_likert_100</td>
</tr>
<tr>
<td>gf_likert_50</td>
<td>gf_likert_110</td>
</tr>
<tr>
<td>gf_likert_60</td>
<td>.gf_likert_120</td>
</tr>
<tr>
<td>gf_likert_70</td>
<td>gf_likert_130</td>
</tr>
<tr>
<td>gf_likert_80</td>
<td>gf_likert_140</td>
</tr>
</tbody>
</table>

Additional information about Design and Layout in Gravity Forms:
http://www.gravityhelp.com/documentation/page/Design_and_Layout
Using Conditional logic

Conditional logic allows you to create rules to dynamically show or hide fields in the form. When you enable conditional logic you will select that condition or conditions that need to be satisfied in order to show or hide a field. Logical statements are based on existing form fields so you should create the fields that determine your conditions to show or hide fields ahead of creating the conditional statements. Conditional statements can be combined using **and** or **or** statements to create more complex conditional logic.

In order for conditional logic to work best you should require the fields that are used in your conditional statement and place the form fields above (before) the field that will have the conditional logic applied.

http://www.gravityhelp.com/documentation/page/Enable_Conditional_Logic

**Field options for conditional logic**

**Example: Using an Other option from a drop down list**

Often times we seek to gather information from visitors when we have a good understanding of the types of information they can provide. Using Drop Down lists is a good way to specify a set of options that are most common to ensure that the data is consistent for the most commonly used responses. In some cases it is necessary to collect alternate information from a drop-down that may deviate from standard choices. The “Other” option on a Drop Down field can be used to allow form users to enter additional information based on an open Single Line Text input field or other filed types (perhaps even another Drop Down).

In this example we will create an “Other” option in a Drop Down list and create a conditional Single Line Text field to display, allowing the user to input the additional information about the response option that they selected.
CREATE THE DROP DOWN LIST THAT WILL ACT AS A CONDITION:
CREATE THE ‘OTHER’ TEXT ENTRY FIELD:

1. Add a Single Line Text Field and name it “Other (please specify)”
2. Under Advanced click **Enable Conditional Logic**

3. From the conditional logic statement options, choose **Classification**

4. The condition drop down should read *is*

5. Select **Other** from the parameter drop down
**Example: Show HTML message when a field contains a specific word**

If you have a contact form on your site and notice that many of the questions are similar and contain specific words that are indicative of a common concern, you may want to provide up-front answers to common questions ahead of form submission in order to help reduce your support burden.

For example, in the training department we see a lot of questions come to us asking about how to cancel or drop registration in training courses. The resolution is pretty standard and to help address support concerns we can provide information up front about the procedure, so that rather than submitting a help request we can provide specific information to help address the visitor’s concerns.

In the following example we will set-up a Paragraph Text field to capture input from a user and use conditional logic to show or hide HTML content on the form that provides possible solutions for issue based on the presence of certain words in the Paragraph Text field.

CREATE THE PARAGRAPH TEXT FIELD TO ACCEPT USER INPUT:
CREATE THE HTML FIELD TO DISPLAY CONDITIONAL INFORMATION:

1. From the Form Editor Screen, select the HTML option under Standard Fields.

2. Point to the new form field and click the down arrow button.

3. Type the name of the field in the field label.
The label is only useful in editing mode and it will not be displayed on the form itself.
In this case type If dropping

4. Type the message you want to display in the content field.
In this case type: Did you know that you can drop your class online?<br>
<a href="http://training.nmsu.edu/saba/help/dropoffering.html">Learn How to Drop</a>

5. Click the Advanced tab.
6. Click the **Enable Conditional Logic** checkbox.

7. From the field drop-down list, select the paragraph field name that will be used to satisfy the condition. In this case it will be **Reason for Request**.

8. From the operator drop-down list, select **contains**.

9. In the value field, type **drop**.

10. Repeat the steps above to add the value **cancel**.

11. Select the **Any** option in order to trigger the HTML field visibility if any of the criteria are satisfied.
Form settings for the Submit button
Example: Limit Email field to @nmsu.edu

In some cases you may want to limit form submissions to serve only those that are members of an internal audience to ensure that communications are sent through official university communication channels.

In this example we will set a conditional criterion on the submit button so that the submit button will only display if the user enters an email address that contains @nmsu.edu. If a user doesn’t enter and @nmsu.edu email address, they will not be able to submit the form.
To enable conditional logic on the form submit button:

1. Click **Form Settings**

2. From the Form Button area, click **Enable Conditional Logic**

3. Select the **Email** field

4. Set the operator to **ends with**

5. Set the value to **@nmsu.edu**

6. Click **Update Form Settings**
Populating fields dynamically

In some cases you may provide information to your audience via email or other Web pages about specific information or actions they should take on your site. You can use dynamically populated fields to pre-populate form data based on values that are passed in the URL.

For example, you may have a form that contains requests for several different services. Based on your initial contact with the customer you know they will need service X. As you provide the link to the customer you can add a parameter to the URL that will automatically populate the service field in the form with the value X.

You can also use this method to measure the effectiveness of marketing campaigns by attaching the parameter to the URL related to each campaign.

For example, the normal link to your form might be: http://example.nmsu.edu/myform/

Using a parameter in the URL you can add a field to automatically populate:
http://example.nmsu.edu/myform/?service=x or
http://example.nmsu.edu/myform/?campaign=20140115

In order for this function to work you must allow your form fields to be populated dynamically.
Example: Using a URL parameter to populate a text field

To allow the field to be populated dynamically on most form fields:

1. Click the Advanced tab
2. Check Allow field to be populated dynamically
3. In the parameter name field, type the name of the parameter that will be appended to the end of your form page URL (Note: This should not contain any spaces or special characters).

For additional information about dynamically populated fields, see:

http://www.gravityhelp.com/documentation/page/Allow_field_to_be_populated_dynamically

In some cases the value may only be important for you and may not be something that you want the user to enter on their own. In this case choose Admin Only from the visibility area.
Security and Spam Protection

If you have never created forms before you may not be aware of the security risks associated with this type of Web content. Static sites that typically just display information to site visitors don't provide as many opportunities for hackers and spammers to compromise your site. When you start creating forms you allow visitors to input information into your site and this process can introduce vulnerabilities.

Hackers and spammers can take advantage of your Web site forms in an attempt to infiltrate your WordPress system, view information stored in your WordPress database or other databases or computer systems connected to your WordPress site, or use the page/post creation and email sending features of WordPress to advertise products or entice users to go to sites that contain malicious code (i.e. phishing). It is important to understand that your site is part of NMSU information systems and your site can be used as a mechanism to compromise crucial information systems and data throughout the entire system. Even if you assume that your site content is not particularly “important” in this respect, it can be used as an easy entry path into our systems and it should be secured to the best of your ability.

There are a few practices detailed below that can be used to reduce security threats. These practices include:

- Taking care to use Gravity Forms appropriately to collect data that is not regulated (see Chapter 1 for details).

- Using Human Detection services

- Using security and spam features in the WordPress core application and settings in Gravity Forms.

- Following standard information security practices and escalating security concerns to the appropriate Information Security officials.

Common Misconceptions about Security

- Spam is just annoying, it's not a threat
- My site is not a high-profile target so I don't need to worry about security
- ICT is completely responsible for security and I don't play a role in securing information or systems
Human Detection

Human detection is a measure taken to determine if the user of your form is a person or a computer program. Many spam or intrusion attempts are the work of computer programs and not the work an individual that sits at their computer and fills out thousands of forms in an attempt to take advantage of your site.

reCAPTCHA is a human detection service used to reduce spam and automated hacking attempts by such programs. It works by introducing a layer of user input complexity that cannot easily be replicated by computer programs, but are relatively simple tasks for humans. Typical reCAPTCHA tasks include entering a series of letters, words, or numbers into a text input field.

In order to use this feature you need to configure the service with an activation key.

1. To activate reCAPTCHA, go to the Gravity Forms Settings

2. Follow the on-screen instructions to activate reCAPTCHA
Gravity Forms Features

Anti-spam honeypot is a built-in option in the Form Settings area that helps to reduce spam submissions.

The anti-spam honeypot is enabled on a per form basis. To enable the anti-spam honeypot:

1. Go to the Form Settings

2. Click the checkbox for Enable anti-spam honeypot

3. Click Update Form Settings to save changes

**Note**

Setting up forms by using properly configured data fields (using drop-down fields, checkboxes, and radio buttons when appropriate), setting maximum character limits, and conditional logic (as illustrated earlier in the chapter) can also reduce spam messages and security risks.
**WordPress Core Features**

Every WordPress site comes with the Akismet plugin which is used to help prevent Spam in blog posts, comments, and trackbacks. Akismet works like typical spam filters for email, by maintaining a blacklist of spammers that it uses to block or filter comments, posts, or trackbacks that look suspicious. Although typically used to prevent comment spam, Akismet is useful in some cases when using Gravity Forms and it's generally a good idea to activate Akismet even if you aren't blogging, per se.

To activate Akismet:

1. From the WordPress Admin Dashboard, click **Plugins**
2. Locate the Akismet plugin and click **Activate**
3. Click **Settings** the follow the on-screen instructions
If you don’t need to use commenting or trackback features for your site, it’s best to disable these options under WordPress settings.

To change your WordPress Settings:

1. From the WordPress Admin dashboard, click **Settings** then **Discussion**
2. Uncheck all the options under Default article settings and Other comment settings
3. Check all the options under E-mail me whenever and Before a comment appears
Practicing Safe Computing and Contacting the Information Security Team

Information security threats are dynamic and information security professionals need to respond to new threats on a continuing basis. Even with the protections that are already put into place and the recommended measures noted above, it should be noted that there is no system that is completely free from potential security vulnerabilities. As a result, we all have a role to play in making sure that we do what we can to minimize risks. This includes following general safe computing practices. For additional information on Safe Computing, see http://infosec.nmsu.edu/faqs/.

If you notice suspicious activity on your WordPress site including spam, hacking, or break-in attempts:

Contact ICT Information Security

http://infosec.nmsu.edu/contact/

or email infosec@nmsu.edu directly.
View and Manage Forms and Form Entries

Options for maintaining forms and form data

Now that you have learned about some of the processes to create and configure forms using both basic and advanced methods we will now focus on what happens after you’ve published your forms for site visitors to use.

In this section you will learn how to view form entries, export form data, export and import forms to back-up or transfer forms to other sites, and maintain form data in a manner consistent with NMSU records management and retention requirements.

LEARNING OBJECTIVES

Upon completion of this section, you will be able to:

View form entries

Export form data

Import and Export forms

Understand how to maintain data collected from forms
Viewing Entries

After a form is submitted the form entries are available to view within WordPress.

In form editing view, click the Entries option from the menu.

The form entries are available in table format, which details a selected set of fields in columns in the tab. You can modify the displayed columns by clicking on the settings button.

You can use filters to display messages that are either unread, starred, or in the trash.

Similar to email messages, form entries can be marked as read or unread with unread being the default setting. Entries can also be starred.
You can click an individual entry to see the entry details by clicking View or by clicking the text in the first column of the entry table. Once you view an entry it is automatically marked as read and an option will be made available for you to mark the message as unread.

By default the only fields displayed in the detail screen are the fields that have values. All blank fields are hidden by default. To view empty fields, click the show empty fields checkbox.

Gravity Forms entries can be used to track ongoing communication by sending updates using Gravity Forms (rather than using standard email). You can add notes to entries and then email the notes to the person that submitted the entry (assuming you collected their email address). You can also resend the initial notifications to the original recipient or you can choose another recipient to forward the message to another address. You can print the individual entry either including the fields or the fields and the notes.

In addition to user supplied data, the entry info also lists the date and time submitted, the IP address of the user submitting the form, and the page where the form was embedded when the entry was made.

You can edit the entry by clicking on the Edit button. When editing the entry you can change the values and perform many of the same functions as you would under the view mode, such as add notes, resend notifications, and print the entry.

Additional Information about Viewing Form Entries:

http://www.gravityhelp.com/documentation/page/Entries
Importing and Exporting Forms

You can export forms created using Gravity Forms (the form itself rather than the data) and import forms created using Gravity Forms using the Import/Export option.

To export existing forms:

1. From the Forms menu, click **Import/Export**

2. From the Export Forms page, choose **Export Forms**

3. Click the checkbox for each form you would like to download
4. Click Download Export File

5. Your operating system will prompt you to select a location on your computer to save the file. You should also choose a file name that makes it easy to identify the form you are exporting. The export will be in XML format.

To import a Gravity Forms export file:

1. From the Forms menu, click **Import/Export**

2. From the Export Forms page, choose **Import Forms**

3. Click **Browse** and use your operating system file browser to locate the XML import file.

4. Click **Import**. The form will now be available in your form list.
Downloading Entries

You can download the entries in CSV format to retain the entries or to use spreadsheet programs, such as Microsoft Excel, to analyze, graph, or print the data.

To download entries:

1. From the Forms menu, click **Import/Export**

2. From the Export Entries option, select the form to export

3. Select the fields you want to export or click Select All
   
   a. If desired, you can use conditional logic to select values that meet your conditional criteria.
   
   b. If desired, you can limit the entries to be exported based on a date range for when the entry was submitted.

4. Click **Download Export File**
5. Your operating system will prompt you to select a location on your computer to save the file. You should also choose a file name that makes it easy to identify the data you are exporting.

6. Once the file is saved to your computer you can open it using a spreadsheet program, such as Microsoft Excel.

Data Retention
Data collected using Gravity Forms redefines the nature of your site as it transforms the site from an informational site to a transactional site. Unlike the static informational content of your site, which is typically replicated elsewhere, the data collected using forms is typically a unique record. Keep the data submitted to Gravity Forms and contact the Records Management and Retention office regarding the proper retention timeline and deposition process.

http://rmr.nmsu.edu