Adobe Experience Manager

Go all-digital with Adobe Experience Manager Forms.

6 tips and tricks that make it easy to author dynamic, responsive forms for any device.

Adobe Experience Manager Forms is a powerful solution within Experience Manager that can help you turn paper-based processes into easy-to-use digital experiences. With it, you can quickly and easily create, manage, publish, and update complex digital forms that your organization's customers can complete on any device.

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Varun Mitra is a technical enablement delivery specialist on the Adobe Experience Manager team. He holds the Adobe Certified Expert—AEM Developer certification which requires an in-depth understanding of the Experience Manager solution.

In his role, Varun combines his passion for educating with his extensive Experience Manager architecture knowledge to train Adobe customers around the world.

With the benefit of his real-world insight, we've curated the following tips and tricks to make it easy for authors to create dynamic, responsive forms for desktop, web, and mobile.

Tip 1: Create adaptive forms with data models in minutes.

Creating adaptive forms with data models from scratch can be time consuming. With the Forms Designer, it takes only minutes. To begin, navigate to the Form Designer. Then click "File" and "New Form." Give the form a name and description and choose a folder where the new form will live. Next, select or import a data model. Follow the New Form wizard to complete form creation. Then save the file as a Dynamic XML form. Navigate to the folder you chose to contain your new form. Then click "Create" and "File Upload." Find and select the new form, and click "Upload." You can now open the file within an Experience Manager instance. When people complete the form, their data will automatically save to the location your chosen data model specifies.

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Tip 2: Create and save commonly used form fields to use again and again.

There's no need to replicate form fields you use frequently, such as name, address, and phone number. With Document Fragments, you can create a form field once and drag and drop it onto any new form you create. Navigate to "Document Fragments" and open or create a folder where you want to store the Document Fragment. Then click "Create," then "Text." Title the Document Fragment, and add a description if desired. Select "Form Data Model," choose a data model where your form field entries will be saved, and click "Select." Click "Next," and the rich text editor will open. From the "Data Model Objects" list under the "User" objects list, click on an object and hit "Enter" on your keyboard. Do this with as many objects as you like.

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Tip 3: Apply custom styling to a form—no code required.

With the Theme Editor, you can apply custom styling to a form without asking a developer to write CSS. For example, you can style a form to display successful field entries in blue and errors in red. Simply click "Forms," then "Themes," "Create," and "Theme." From the "Basic" tab, title and name the theme. From the "Advanced" tab, select or enter a clientlib that will correspond with the new theme. Next, click "Create," then "Open." Edit your theme and click "Save."

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Good to know: You can also customize forms created by developers in the Theme Editor. Just ask a developer to provide the CSS, import it into the Theme Editor, and make changes as desired.

Tip 4: Restrict what can be typed into an entry field.

The Rule Editor allows you to place restrictions on a value a customer can enter into a form field. For example, if your form contains an entry for a social security number, you can add a rule that states the field can only contain numbers. Adding restrictions can help you reduce entry errors and improve the quality of the data you save. First, open a form in authoring mode. Then click on a "Form Object," such as "Marital Status," and click the gavel icon. Next, click "Create" to launch the Rule Editor. Click "Select State" and choose a state from the dropdown menu, such as "is equal to." From the "Enter a String" field dropdown menu, choose another component, such as "Married." Add a condition if desired, and then click "Done."

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Helpful hint: You can also use the Rule Editor to hide or show parts of a form based on what a customer inputs into the form. For example, if a customer is signing up for health insurance, you can show family member information fields only when the customer indicates that they have a spouse or children.

Tip 5: Trigger web services for certain events.

With the Rule Editor, you can invoke web services in your Experience Manager Forms instance. For example, a credit card application can be configured to trigger an external web service that computes credit scores. Or, a stock management company can trigger a web service that retrieves stock values. Start by opening a form in authoring mode. Then click on the "IP Address" form object and click the gavel icon. Next, click "Create" to launch the Rule Editor. Click "Select State" and choose "is changed" from the dropdown menu. From the "Action" dropdown menu, select "Invoke Service." A "Select" field will pop up. Paste a web service address into the field. From the "Select Operation" dropdown menu, select a web service property. Then drag and drop "IP Address" to "Input," and components like "Country" to output. Then click "Done."

Try this: It's easy to remove a rule once it's been added to a form. From the Rule Editor, click on a Form Object. If there is an existing rule applied to the object, you'll see a box with a checkmark. Simply click on the checkmark to remove the rule.

Tip 6: Use the mobile app to take Experience Manager Forms anywhere.

Capture information wherever your work takes you with the Experience Manager Forms mobile app, available for both Android and iOS. Any form stored in Experience Manager Forms can be synchronized with the mobile app, and you can keep working even when the app is offline. Just synchronize the results when a data connection becomes available. To begin, simply download the app and go.

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Good to know: If desired, your organization's developers can add custom functionality or branding to the Experience Manager mobile app. View step-by-step instructions ›

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