

Eloqua Forms : A Rebirth

" You are no longer able to create or copy new forms using the classic design editor."

These were the words highlighting the changes that Eloqua has rolled out with the new 20A release. Prior to this, the users had two different form editors to choose from, the aforementioned "classic" design editor, and the relatively new "responsive" editor. Eloqua's new responsive forms are meant to replace classic forms, a transition which has already begun. As of now, Eloqua still allows users to edit pre-existing classic forms, but the creation of classic forms has been deprecated. Eventually it is believed that existing classic forms will be read-only as well. **This paper discusses the shortcomings of the existing methods of converting a classic form to a responsive form and highlights the steps that portQii have taken to make this transition easier.**

CHALLENGES

Frequent users of Eloqua would have been well aware of the changes coming to Eloqua forms. Oracle has been informing its customers of the changes and slowly putting in restrictions around classic forms to ease the transition process. The problem, however, lies with the transition itself. As per Eloqua's recommendation, the user can make use of the 'Save As' and 'Save As Template' feature on classic forms to save them as responsive forms. And rightly so, the 'Save As' feature does default to saving a copy of the classic form as a responsive form, keeping all the original form's fields and processing steps intact.



By enabling this feature, Eloqua has made sure the user's do not have to painstakingly rebuild all their existing forms in the responsive editor, but rather, they can just recreate the form with a few clicks of a button. However, given that an average Eloqua Instance can have upwards of 1000 forms, and knowing that Eloqua does not have the means to transform the forms in bulk, the users may feel like they have been pushed into a corner.



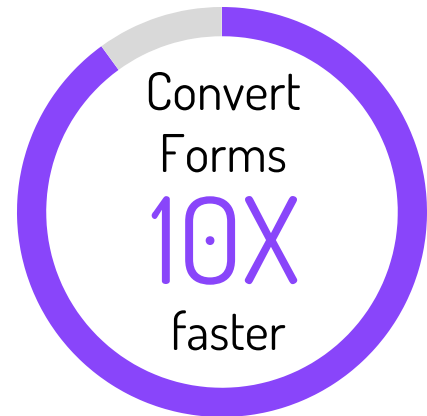
Another problem one must consider is the fact that 'Save As' creates a new form. All of the landing pages and other assets still reference the old classic form. Eloqua does not provide an easier way of replacing the usage of the old forms with the newly created forms. This process of having to manually replace old classic forms with the newly created responsive forms casts a spotlight on the lack of a well-defined means of transition from one form type to another.

As it currently stands, a user would have to use the 'Save As' feature on an existing classic form, find all the assets (landing pages, segments, contact filters, etc.) where the old classic form is being used, open each of those dependent assets and replace the original form's references with the new form (bear in mind, there is no limit to the number of dependencies that an asset can have), and then repeat the process for all the classic forms.

The Solution

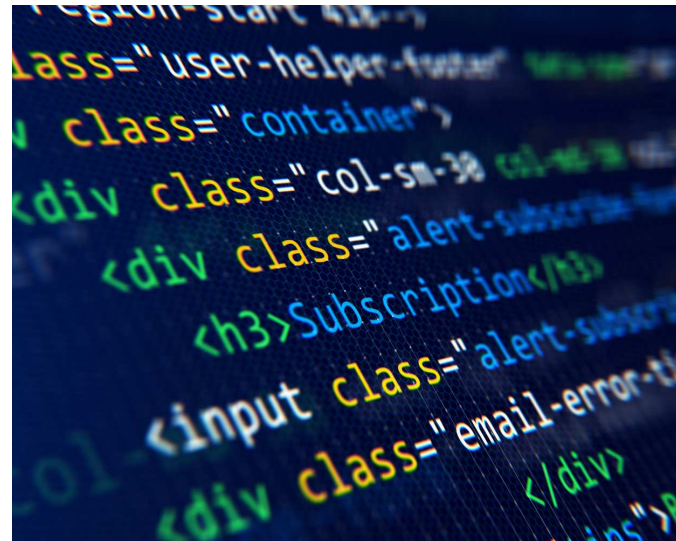
Now that we know what the deprecation of classic forms means for Eloqua customers, this is how we can help:

1. Only solution that replaces the old forms with the new forms throughout your Eloqua instance. Our solution does not only create a responsive form from the classic forms, but it also switches out the old form with the new responsive form wherever it was used.
2. Over 1000 hours saved for forms. As per Oracle's recommendation, if you were to convert 2000 forms and switch them out manually, our estimate is that it would take you over 1000 hours. Our application and service can accomplish this same task in under 100 hours.



Converting the forms

Ever since the initial announcement that classic forms were to be deprecated, portQii has understood the need to have the conversion on classic forms to responsive forms to be automated. To address this requirement portQii has developed an application and offers a service that automatically converts the forms with minimal user interaction. All that the users have to do is identify the forms (individual or by selecting a folder) that need to be converted and add it to the queue to be processed. The application takes over and starts the conversion process.



Replacing the dependencies

The second step in this process is to replace wherever the old classic form was being used with the new responsive form. This step in the process is a lot more complex and much more time consuming. With the use of our application we can provide the service of switching references from the classic to responsive form. With our tool and service Eloqua customers can be ensured that all dependencies are replaced with minimal effort. No other solution is guaranteed to provide a complete end to end process for converting classic to responsive forms.

RESULTS

With classic forms eventually expected to become read-only the transition period is expected to be rough, especially for those who continue to copy classic forms and update these forms going forward. As outlined above, the manual method for transitioning are immensely time consuming and leave a lot to be desired.



portQii identifies the issues and proves it has the capability to make the transitioning to responsive forms a breeze. The two services highlighted above will work together to ensure that the integrity of the assets as a whole is maintained during the transition, while also making sure that the entire process provides a complete end-to-end solution.

Conclusion

portQii continues to work with its customers in developing a complete end-to-end solution around the governance and health of their customer's Eloqua instances. Our advanced application platforms enable the conversion optimization of forms and other assets including landing pages and emails. Our applications and services not only eliminate system and process inefficiencies but also allow Eloqua customers to focus on the business of marketing and generating revenue rather than spending time on inefficient conversion exercises.

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