

INVOLVEMENT Network

MANAGING FORMS

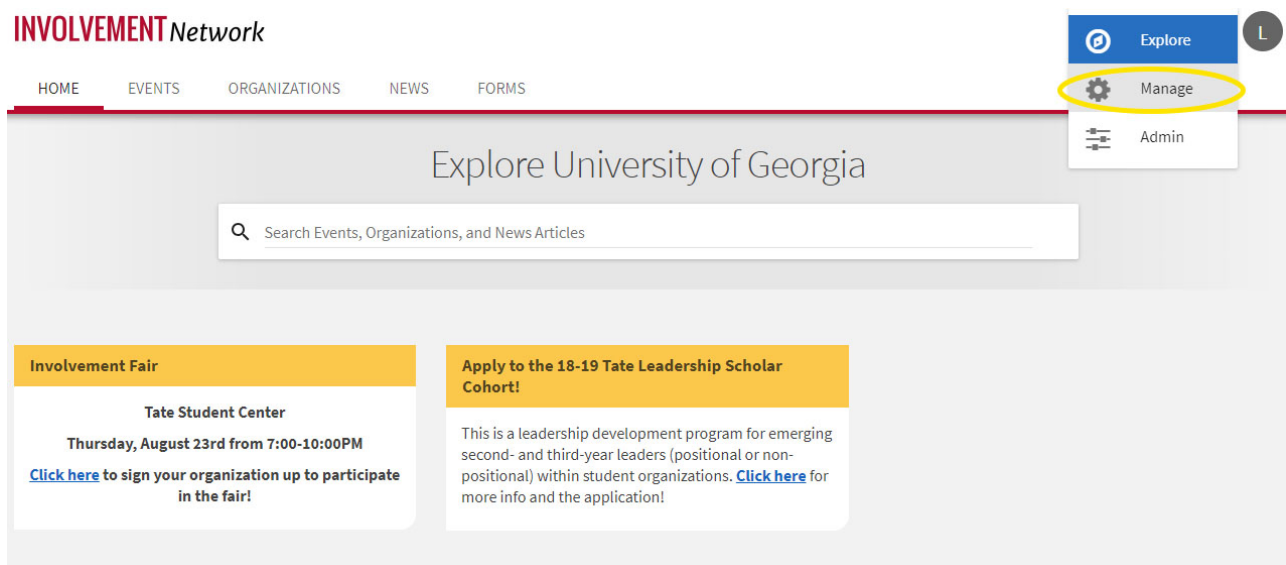
The Forms feature of your organization page can be beneficial for hosting applications, surveys, sign-ups, etc. Within this guide, you will find the following information to help you utilize the Forms feature:

- [Accessing Forms](#)
- [Creating Forms](#)
- [Editing Forms](#)
- [Publishing and Sharing Forms](#)
- [Accessing Form Submissions](#)

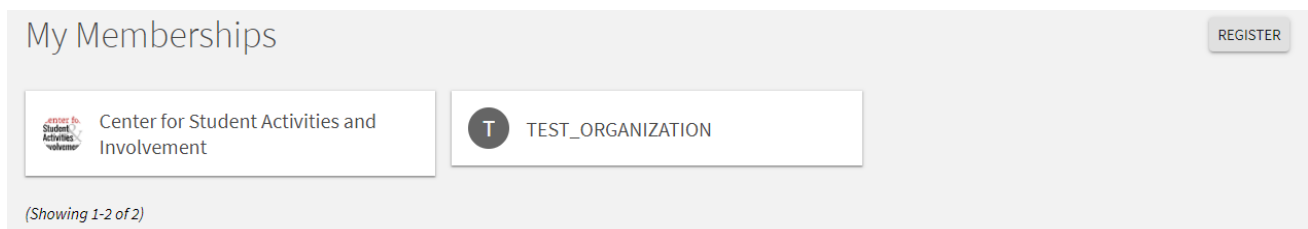
ACCESSING FORMS

Note: Only users with full Forms access in the organization will be able to create a form. To edit member access to forms, please review the [Managing Rosters](#) guide.

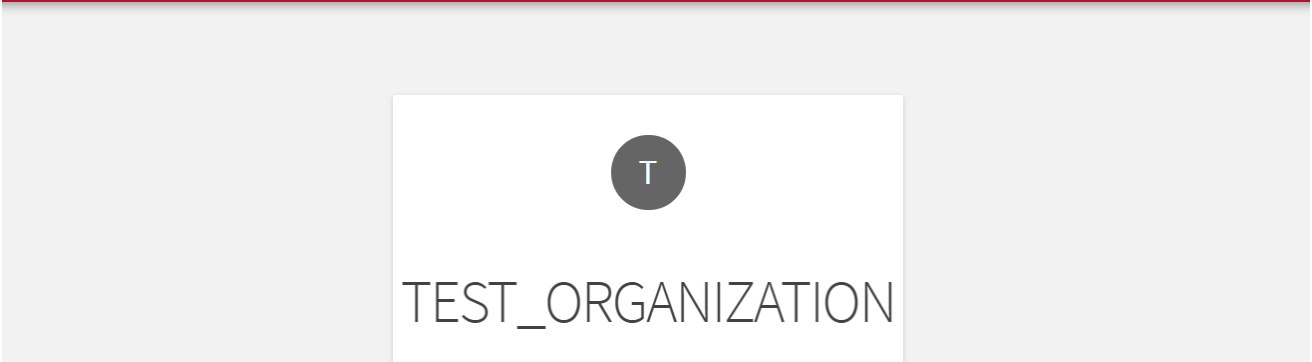
1. Log in to the [Involvement Network](http://involve.uga.edu) at <http://involve.uga.edu>.
2. Select “Manage” from the menu next to your user icon (top, right corner).



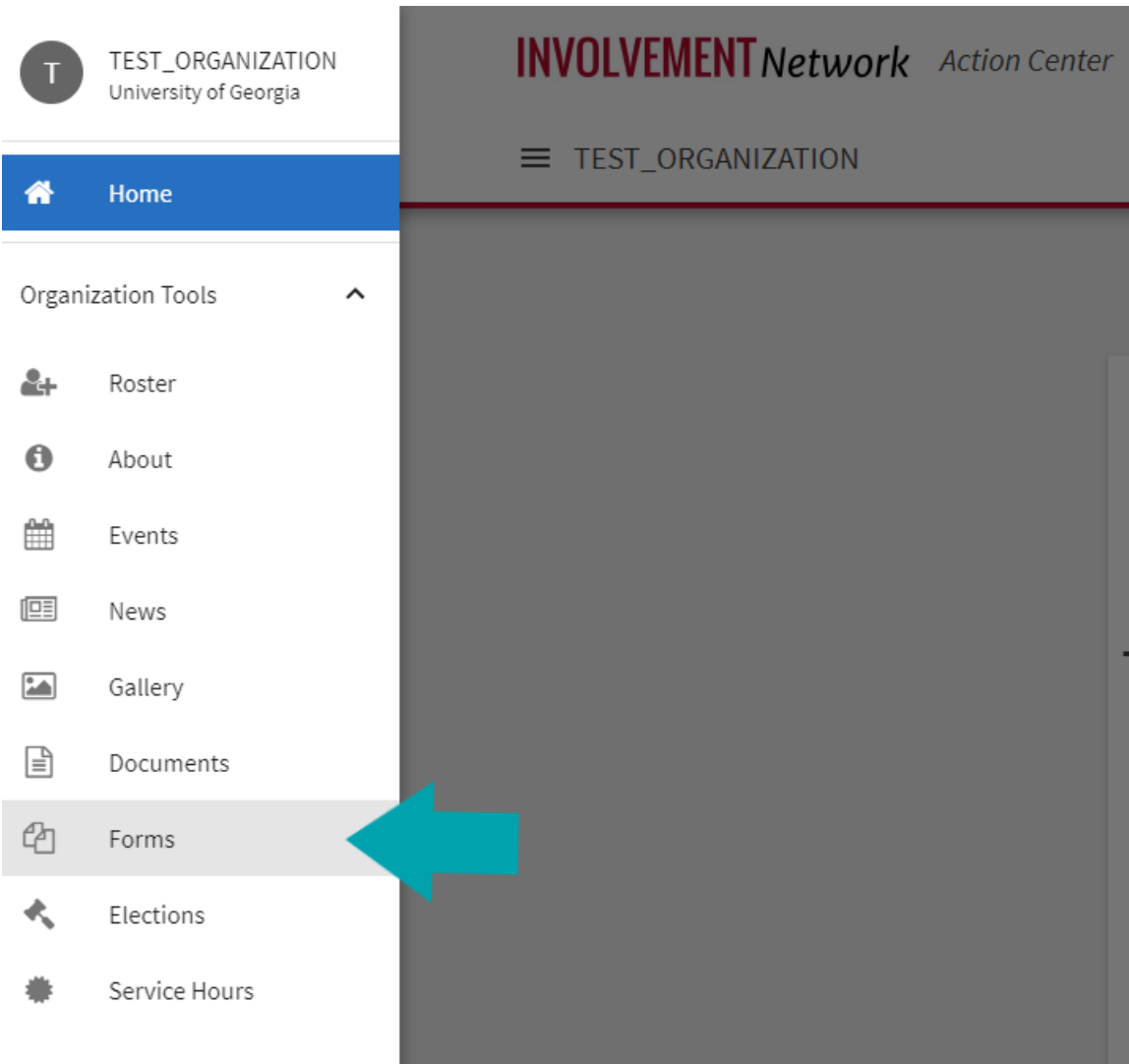
3. Select the Organization you would like to manage from “My Memberships”.



4. Select the menu on the left-hand side of the page.



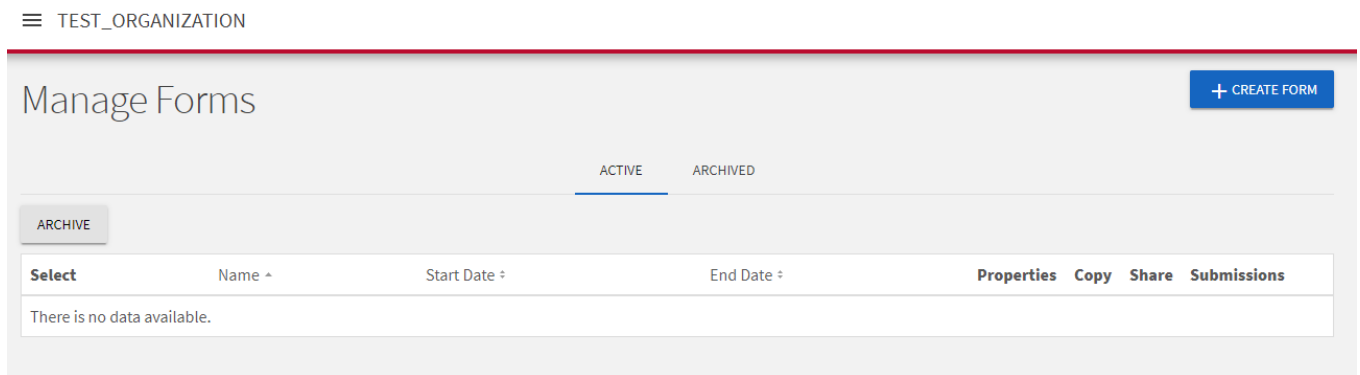
5. Select "Forms" from the menu.



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CREATING FORMS

1. After following the steps to access your organization’s forms, you will be directed to a menu where will automatically see any active forms your organization is hosting. You have the ability to view archived forms as well. To create a new form, select the blue “Create Form” button.



2. When creating a form, you will first be prompted to identify your form properties. Enter a name for your form and then fill out the additional settings.

See below for an explanation of each setting.

Setting

Function

Active

Determine if the form should be accessible yet. If the active option is not chosen, then users will not be able to complete the form. Leaving "Active" unchecked allows you to work on a form before making it live to your users.

Start/end time

The time period for which the form should be open. Submissions will only be accepted during this time period.

Allow Anonymous Submissions for Public Users

Enabling this option means anyone, including those who do not have an account in your community, is able to fill out the form. If you enable this setting, “allow multiple submissions” will be disabled because there is no method to limit respondents to one submission.

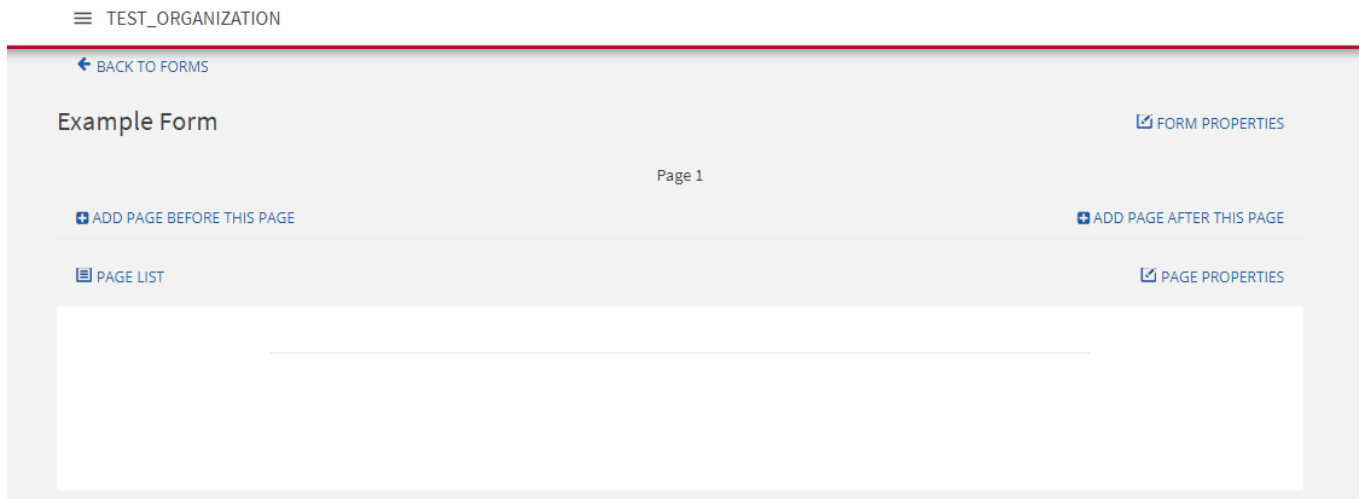
Allow Multiple Submissions

Users can submit more than one submission. If this option is not selected, users will be restricted from the form after one submission.

Submission Restrictions

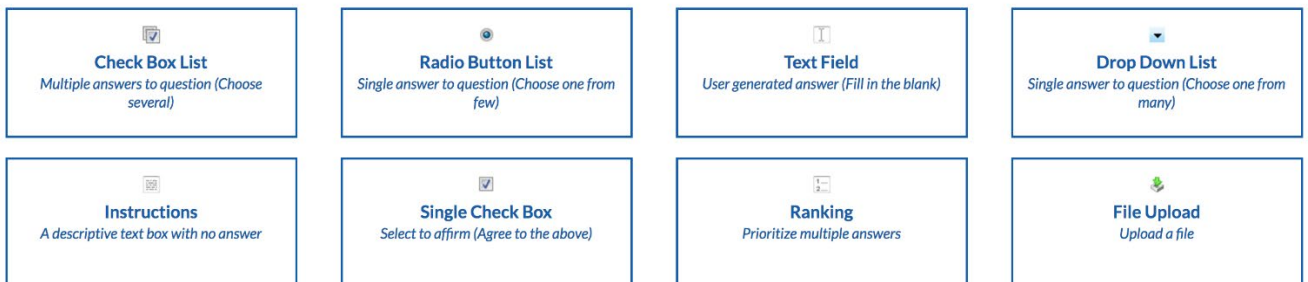
Determine if you want to restrict the form to certain users. If you’re creating this form at the administrative level, you have the option to restrict the form to primary contacts in specific organization types. If you create this form in an organization, you can restrict the form to users within your organization that hold a specific position. If you want to make your form available to any user in your community, do not select any submission restrictions.

- After you determine the settings for your form, you'll be taken to the form builder and you will land on the first page of your form. At any time, you can go back into the settings by clicking "Form Properties" in the top right of the page. In addition, you can move to additional pages of the form by clicking "Page List" in the top left. To name the page, click "Page Properties" in the top right. The name of each page will be visible to users filling out the form.



- When you are ready to start adding questions into the form, review list of question types that are available to you. Each of these question types serve a unique purpose. See below for a complete explanation of each. **Note:** Any time you add a question to your form or change a setting, these changes will save in real time.

Add New...



Question Type

Function

Check Box List

Multiple choice question that allows users to choose more than one option.

Radio Button List

Multiple choice question that only allows users to select one option.

Text Field

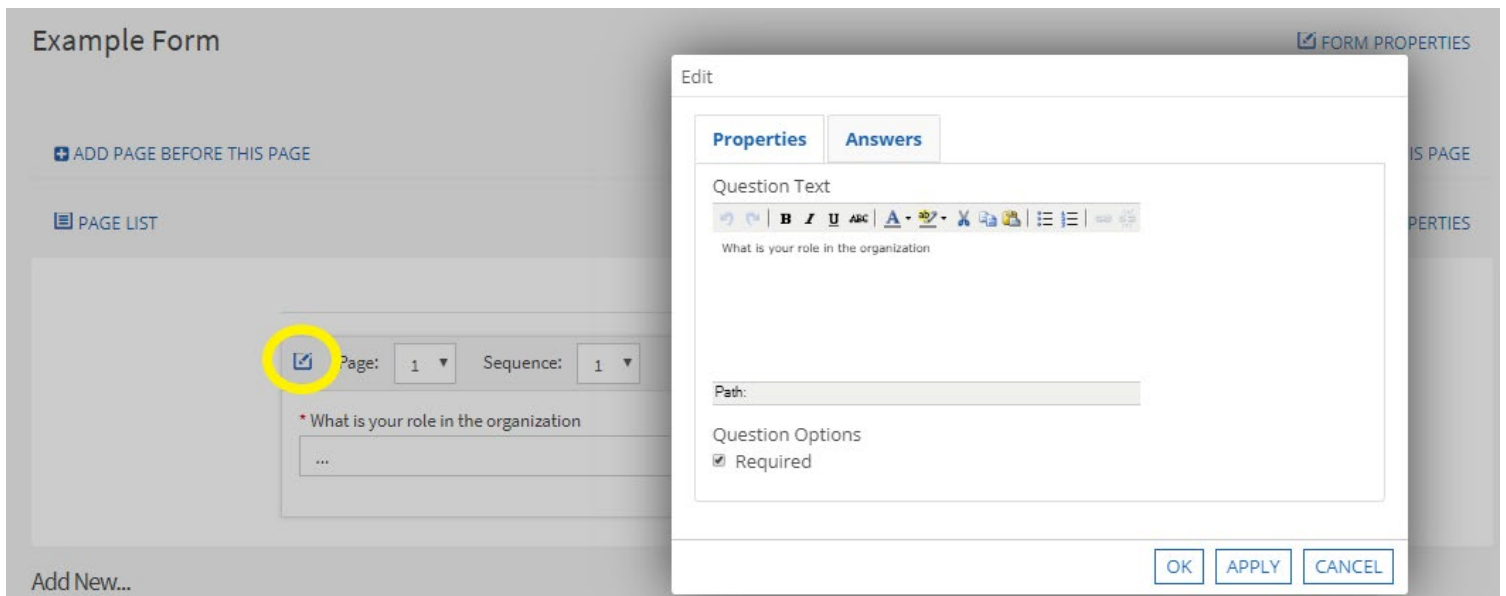
Open text response. Alter the number of rows to provide the user a larger space to write in for longer answers. You can also use the Text Field question to utilize validation, ensuring a specific format is entered.

Drop Down List

Multiple choice question where users can only choose one option. The only difference between the dropdown and radio button options is that the user has to click the dropdown to view the available choices.

- Instructions This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
- Single Check Box Think of this as a method to provide the user a set of terms and conditions that they need to agree to before they can proceed on the form. You can input the terms that need to be agreed upon and the user will be provided a single check box to confirm their agreement.
- Ranking Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
- File Upload Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.

5. For each of the question types, you also have additional question options. Once you have created a question, click on the blue Edit icon within the question to view its additional options.



Potential options and their descriptions are below.

Question Setting

Function

Required

Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.

Shuffle Answers

For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For example, if you input an alphabetical list but want the answer choices to appear random, you can shuffle them. Note: This will not shuffle the answers every time a different user fills out the form.

Minimum and maximum answers

If you are utilizing the Check Box List, you can identify the minimum or maximum number of answers a user can select.

You also have the ability to put additional properties on your answer choices for Check Box List, Radio Buttons, and Ranking question types.

Question Setting	Function
Include Text Area	Text Area allows you to provide additional space for users to write-in an answer. For example, you may want to include an "Other" option to a multiple choice question, but want users to write-in their additional option.
Include Tooltip	The tooltip allows you to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice.
Include Additional Text	Similar to the tooltip, Additional Text allows you to put in additional information about an answer choice. The difference between the two is in how the information appears. With Additional Text, an information icon appears next to the answer choice. Clicking that icon will open up a box with the additional information.

6. OPTIONAL: Adding form logic, if desired, is easy. The form builder utilizes page logic, meaning you can present the submitter questions based on their answers to earlier questions in the form. For more information about form logic, [click here](#).
7. OPTIONAL: When you are done building your form, you can identify who needs to be able to have access to give feedback on form submissions. Select the name of the form, and then click "Form Properties". Navigate to the "Reviewers" tab. You will be provided a list of every member of the organization. With organization forms, you can select any member of the organization to be a reviewer on the form, without giving them the ability to approve or deny the submission. Add reviewers to the form by clicking the plus sign next to a user. You will see their name populate in the "Assigned Reviewers" list on the right side of the screen. These reviewers will receive notifications about new submissions and will have access to view and comment on form submissions. **Only users with full Forms access in the organization will be able to make final decisions about submissions. To edit member access to forms, please review the [Managing Rosters](#) guide.**

Edit CPB Committee Application

PROPERTIES **REVIEWERS**

Reviewers will receive notifications for new form submissions, will be able to view submissions, and can contribute to the discussion wall for submissions.

Name	Campus Email	
Aadil Enberg	aadilenberg@engageu.edu	+
Alyssa LaRoue	alyssalaroue@engageu.edu	+
Amanda Mintz	amandamintz@hometown.edu	+
Ana Butterbrodt	anabutterbrodt@engageu.edu	+

Assigned Reviewers

Brandon Diniz
brandondiniz@engageu.edu

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EDITING FORMS

Note: Any changes made to the form after submissions have been received will result in a loss of data.

Tip: The “Copy” function is a helpful tool when managing a regular organization process without losing the previous data.

1. After following the steps to access your organization’s forms, you will be directed to a menu where will automatically see any active forms your organization is hosting.
2. If you need to edit the properties of the form, select “Properties”.

☰ TEST_ORGANIZATION

Manage Forms

[+ CREATE FORM](#)

ACTIVE ARCHIVED

ARCHIVE

Select	Name ^	Start Date ^	End Date ^	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	6/21/2019 12:15 PM	7/21/2019 1:15 PM	Properties	Copy	Share	

3. If you need to edit the questions on the form, select the name of the form.

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Manage Forms

[+ CREATE FORM](#)

ACTIVE ARCHIVED

ARCHIVE

Select	Name ^	Start Date ^	End Date ^	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	6/21/2019 12:15 PM	7/21/2019 1:15 PM	Properties	Copy	Share	Submissions (1 unapproved)

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PUBLISHING AND SHARING FORMS

1. In “Properties”, you have the ability to change the form status between active and inactive. If you’re wanting to share the form, make sure the form status is set to active.

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Manage Forms

+ CREATE FORM

ACTIVE ARCHIVED

ARCHIVE

Select	Name ^	Start Date ^	End Date ^	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	6/21/2019 12:15 PM	7/21/2019 1:15 PM	Properties	Copy	Share	

INVOLVEMENT Network Action Center

TEST_ORGANIZATION

← BACK TO FORMS SHARE FORM

Edit Example Form

PROPERTIES

*** Name**

Example Form

Status

Active

2. After you have created a form, the next step is to distribute it. On your list of forms, look for the “Share” option. This is visible on the right side of the page.

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Manage Forms

+ CREATE FORM

ACTIVE ARCHIVED

ARCHIVE

Select	Name ^	Start Date ^	End Date ^	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	6/21/2019 12:15 PM	7/21/2019 1:15 PM	Properties	Copy	Share	

- Next, you're provided the form URL. If you intend on sending a message with a link to the form, copy the URL. **Note:** Do not copy the URL from your browser's address bar, as this URL is unique to your account and will not direct others to the form.

INVOLVEMENT Network Action Center

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[← BACK TO FORMS](#) [FORM PROPERTIES](#)

Share URL

Copy the link below to share this form. You must use this link, not the link from your browser's address bar.

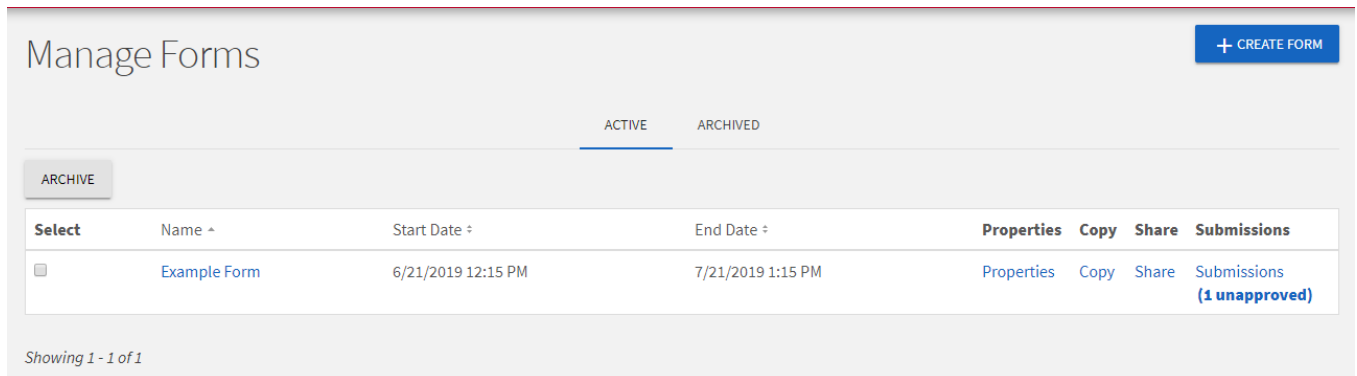
Copy URL to Share

<https://uga.campuslabs.com/engage/submitter/form/start/304035>

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ACCESSING FORM SUBMISSIONS

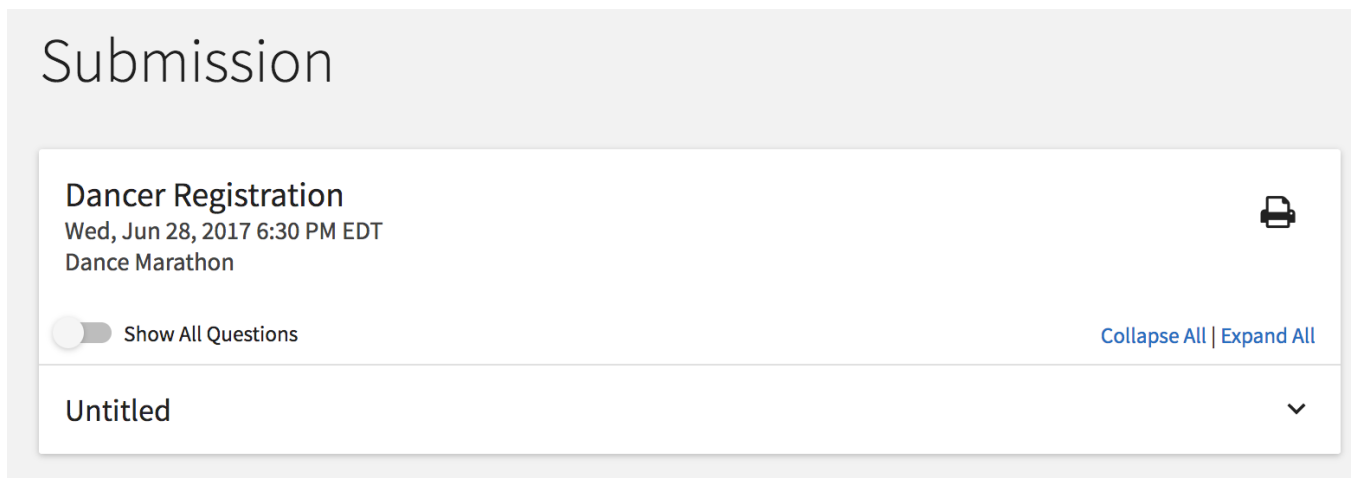
1. To manage your submissions, select the "Submissions" heading for the form you are accessing.



The screenshot shows the 'Manage Forms' interface. At the top right is a '+ CREATE FORM' button. Below the title are tabs for 'ACTIVE' and 'ARCHIVED'. A table lists forms with columns: Select, Name, Start Date, End Date, Properties, Copy, Share, and Submissions. One form is listed: 'Example Form' with start date '6/21/2019 12:15 PM' and end date '7/21/2019 1:15 PM'. The 'Submissions' column for this form shows '(1 unapproved)'. A 'Showing 1 - 1 of 1' indicator is at the bottom left.

Select	Name ^	Start Date ^	End Date ^	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	6/21/2019 12:15 PM	7/21/2019 1:15 PM	Properties	Copy	Share	Submissions (1 unapproved)

2. On the submission page, you will see the ability to expand/collapse all sections to make your reviewing easier. You can also click the print icon in the upper right hand corner to print the submission or generate a PDF.



The screenshot shows the 'Submission' page for a form titled 'Dancer Registration'. The submission date and time are 'Wed, Jun 28, 2017 6:30 PM EDT' and the form name is 'Dance Marathon'. There is a print icon in the top right. A toggle switch for 'Show All Questions' is on the left, and 'Collapse All | Expand All' links are on the right. The submission content is currently collapsed to 'Untitled'.

3. When you are ready, make your decision using either the "Approval" or "Your Review" box on the right hand side, based on your role and relationship to the submission. Remember that final approval is not based on reviewer feedback and that final approvers can make this decision at any time. If you are a final approver, you can leave a custom comment when making your decision that will be sent to the submitter.


Approval

APPROVE
 DENY

Closing Comment (optional)

A voting reviewer will simply give a thumbs up or thumbs down to indicate whether they think the form should be approved.

Your Review



Amanda Mintz
Your Vote: Approve

4. Optional: At any point, you can export form submissions in mass. You can also approve all submissions to a single form at once. To do this, navigate to the Forms tool, in the organization's Action Center. To export all submissions in mass, simply go to the submission list (shown in an organization's Action Center below).

Manage Forms

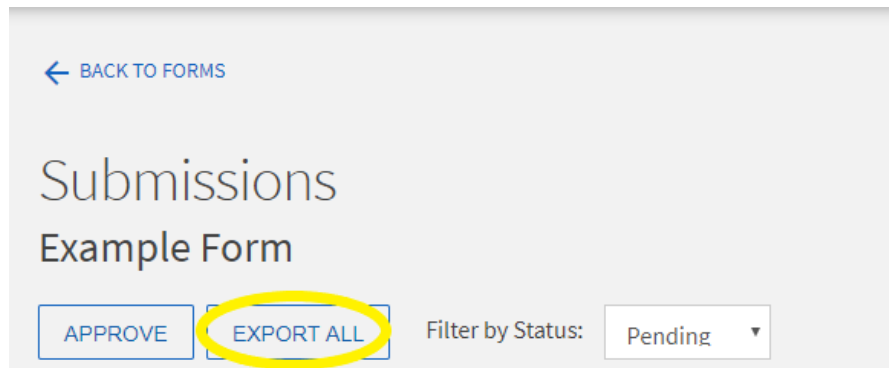
+ CREATE FORM

ACTIVE
ARCHIVED

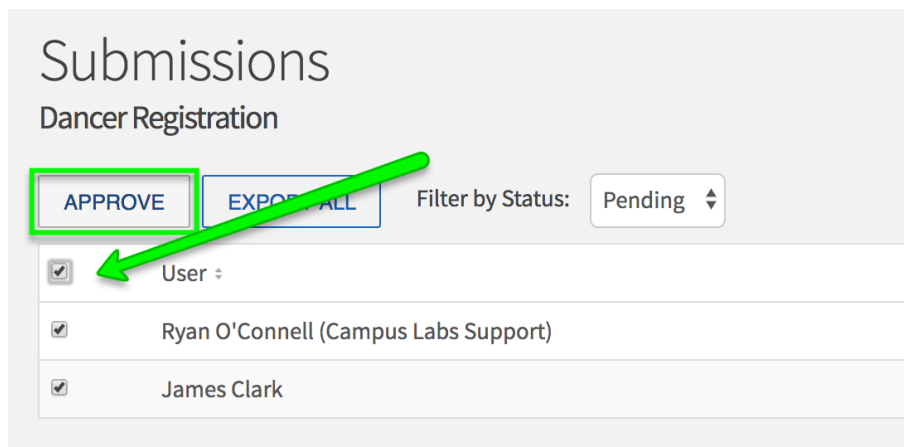
ARCHIVE

Name	Start Date	End Date			
<input type="checkbox"/> CPB Committee Application	4/20/2017 5:00 PM	8/20/2017 5:00 PM	Copy	Publish	Submissions
<input type="checkbox"/> Event Chair Report	4/20/2017 5:00 PM	5/20/2017 5:00 PM	Copy	Publish	
<input type="checkbox"/> Event Co-Sponsorship Request	4/20/2017 5:00 PM	5/20/2017 5:00 PM	Copy	Publish	

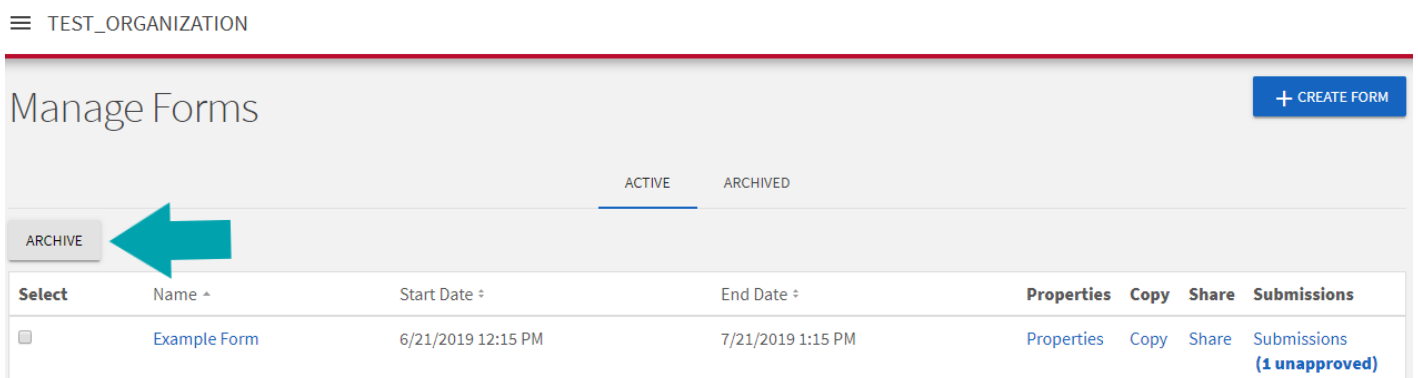
Locate the "Export All" button at the top of the page. These submission exports run through a queue and you will receive an email as soon as the report has been processed.



From this same page, select the check box that selects all submissions and then hit "Approve" to approve all submissions in mass.



5. After you have completed use of the form, you can use the Archive function to remove old forms from the organization's "Manage Forms" menu. Archived forms can be restored and accessed in the future.



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