

INVOLVEMENTNetwork

MANAGING FORMS

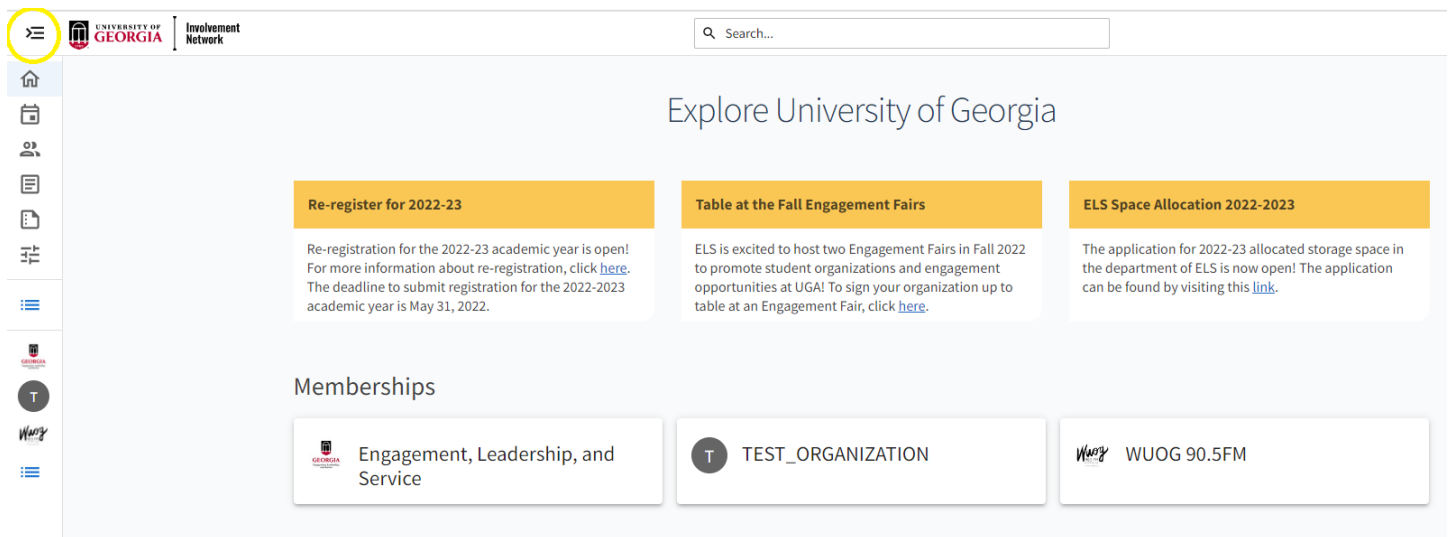
The Forms feature of your organization page can be beneficial for hosting applications, surveys, sign-ups, etc. Within this guide, you will find the following information to help you utilize the Forms feature:

- [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 the logo in the Top Left by the University of Georgia Logo:



3. Select the Gear symbol next to your organization name:

UNIVERSITY OF GEORGIA Involvement Network


Search...


Home Events Organizations News Forms Admin


MY BRANCHES

Browse Branches

MY ORGANIZATIONS

Engagement... 

TEST_ORGA... 

WUOG 90.5FM 

View All Memberships

Explore University of Georgia

Re-register for 2022-23


Re-registration for the 2022-23 academic year is open! For more information about re-registration, click [here](#). The deadline to submit registration for the 2022-2023 academic year is May 31, 2022.

Table at the Fall Engagement Fairs

ELS is excited to host two Engagement Fairs in Fall 2022 to promote student organizations and engagement opportunities at UGA! To sign your organization up to table at an Engagement Fair, click [here](#).


ELS Space Allocation 2022-2023

The application for 2022-23 allocated storage space in the department of ELS is now open! The application can be found by visiting this [link](#).




International Student Orientation Campus and Community Resourc...

Tuesday, August 9 at 3:30PM EDT




International Student Orientation: Morning Welcome

Wednesday, August 10 at 9:00AM EDT



International Student Orientation: Squad Time 8

Wednesday, August 10 at 3:30PM EDT



International Student Orientation: Squad Time 5

Wednesday, August 10 at 3:30PM EDT

4. Select "Forms"

UNIVERSITY OF GEORGIA Involvement Network


Search...


Home Events Organizations News Forms Admin


MY BRANCHES

Browse Branches

MY ORGANIZATIONS

Engagement... 

TEST_ORGA... 

WUOG 90.5FM 

View All Memberships

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Explore University of Georgia

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UGA Fall Exec Retreat

Monday, August 15 at 9:00AM EDT


Student Center - Room 471



North of the Arch

Monday, August 15 at 9:30AM EDT


College Square



Panhellenic Recruitment Round 2

Sunday, August 14 at 7:00AM EDT

S Milledge Ave



MSP Welcome at Ramsey Center

Monday, August 15 at 6:00PM EDT

Ramsey Student Center

VIEW MORE EVENTS

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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, press the three dots and select the "Create Form" button.

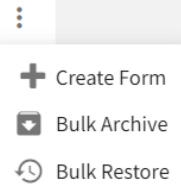
Forms

Showing 1 - 10 out of 16

Exec Applications for the 2020 School Year

Start Date: Mon, Oct 28, 2019 7:00 PM EDT, End Date: Mon, Nov 11, 2019 11:45 PM EST

Total Submissions: 24 Pending: 24 Approved: 0 Denied: 0 Received: 0



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 enable option is not chosen, then users will not be able to complete the form. Leaving "Enabled" 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.

3. 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.

The screenshot shows a form editor interface. At the top, there's a header with a menu icon and 'TEST_ORGANIZATION'. Below that, a navigation bar contains 'BACK TO FORMS'. The main area is titled 'Example Form' and 'Page 1'. On the right, there's a 'FORM PROPERTIES' link. Below the main area, there are links for 'ADD PAGE BEFORE THIS PAGE' and 'ADD PAGE AFTER THIS PAGE'. At the bottom, there's a 'PAGE LIST' link and a 'PAGE PROPERTIES' link. The main content area is empty, showing a horizontal line.

4. 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...

The grid displays eight question type options, each with an icon, title, and description:

- Check Box List**: Multiple answers to question (Choose several)
- Radio Button List**: Single answer to question (Choose one from few)
- Text Field**: User generated answer (Fill in the blank)
- Drop Down List**: Single answer to question (Choose one from many)
- Instructions**: A descriptive text box with no answer
- Single Check Box**: Select to affirm (Agree to the above)
- Ranking**: Prioritize multiple answers
- File Upload**: Upload a file

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.

The screenshot shows a form editor interface. On the left, a question titled 'What is your role in the organization' is displayed. A blue edit icon (a square with a pencil) is circled in yellow. To the right, an 'Edit' dialog box is open, showing the 'Properties' tab. The dialog contains a 'Question Text' field with the text 'What is your role in the organization', a 'Path' field, and a 'Question Options' section with a checked 'Required' checkbox. The dialog has 'OK', 'APPLY', and 'CANCEL' buttons at the bottom.

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.**

The screenshot displays the 'Reviewers' tab in a form builder. At the top, there are four tabs: 'PROPERTIES', 'REVIEWERS' (which is active), 'OUTLINE', and 'EDIT QUESTIONS'. Below the tabs, a message states: 'All reviewers will receive notifications for new form submissions, be able to view submissions, and be able to contribute to the discussion wall for submissions. Reviewers can also be customized further individually.' On the left, there is a 'Search Reviewers' section with a search bar containing the text 'Type to search'. Below this is a 'Reviewer Status' section with three radio button options: 'All Reviewers' (which is selected), 'Voting Reviewers', and 'Non-Voting Reviewers'. On the right, there is a list of '2 Reviewers' showing 'Showing 1-2 of 2'. The list contains two entries: 'Danni KEANE' and 'Diane Humphreys', both labeled as 'Non-Voting Reviewer'. Each entry has a circular icon with a 'D' and a trash can icon to its right.

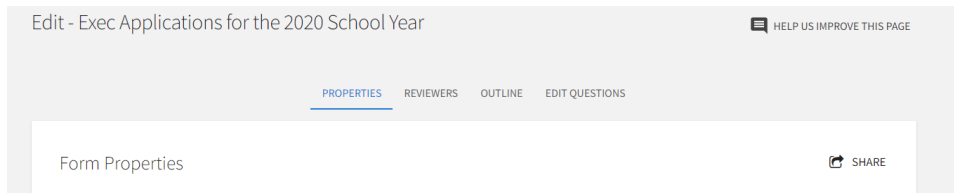
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EDITING FORMS

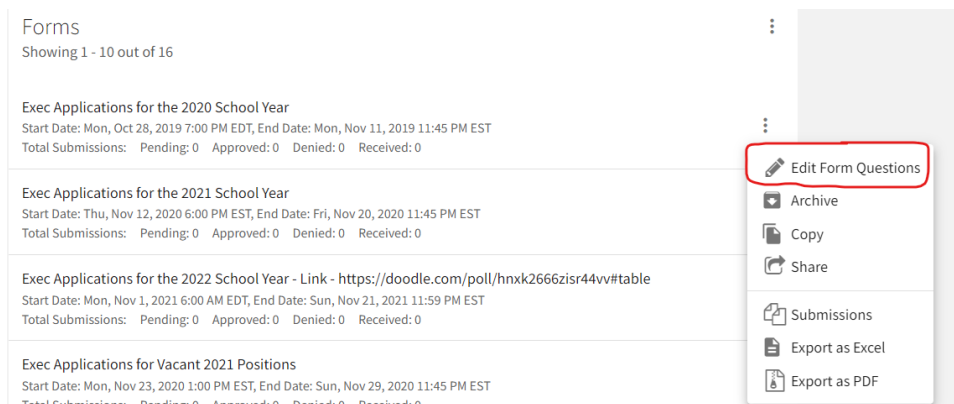
Note: Any changes made to the form after submissions have been received will result in a loss of data.

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, click on the Form.



3. If you need to edit the questions on the form, select the three dots, and Edit Form Questions.



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PUBLISHING AND SHARING FORMS

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

The screenshot shows the 'Form Properties' settings page for a form titled 'Exec Applications for the 2020 School Year'. The page has tabs for 'PROPERTIES', 'REVIEWERS', 'OUTLINE', and 'EDIT QUESTIONS'. The 'PROPERTIES' tab is active. Under the 'Settings' section, the 'Form Name' is 'Exec Applications for the 2020 School Year'. Below it, the 'Form Status' is set to 'ENABLED', which is highlighted with a red circle. A 'SHARE' button is visible in the top right corner of the settings area.

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 once you select the three dots.

The screenshot shows a list of four forms. The first form is 'Exec Applications for the 2020 School Year' with a start date of Oct 28, 2019, and an end date of Nov 11, 2019. The second is 'Exec Applications for the 2021 School Year' with a start date of Nov 12, 2020, and an end date of Nov 20, 2020. The third is 'Exec Applications for the 2022 School Year - Link - https://doodle.com/poll/hnxxk2666zizr44vv#table' with a start date of Nov 1, 2021, and an end date of Nov 21, 2021. The fourth is 'Exec Applications for Vacant 2021 Positions' with a start date of Nov 23, 2020, and an end date of Nov 29, 2020. A context menu is open over the first form, showing options: 'Edit Form Questions', 'Archive', 'Copy', 'Share' (highlighted with an orange bar), 'Submissions', 'Export as Excel', and 'Export as PDF'.


3. 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.

Sharing - Exec Applications for the 2020 School Year

URL

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

COPY

 This form is not currently accepting submissions.

- Outside Active Date Range.

CLOSE

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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 a 'Forms' page with a list of four forms. A dropdown menu is open on the right side, showing options: 'Edit Form Questions', 'Archive', 'Copy', 'Share', 'Submissions' (highlighted with an orange bar and a red notification icon), 'Export as Excel', and 'Export as PDF'.

Forms
Showing 1 - 10 out of 16

Exec Applications for the 2020 School Year
Start Date: Mon, Oct 28, 2019 7:00 PM EDT, End Date: Mon, Nov 11, 2019 11:45 PM EST
Total Submissions: 24 Pending: 24 Approved: 0 Denied: 0 Received: 0

Exec Applications for the 2021 School Year
Start Date: Thu, Nov 12, 2020 6:00 PM EST, End Date: Fri, Nov 20, 2020 11:45 PM EST
Total Submissions: 14 Pending: 14 Approved: 0 Denied: 0 Received: 0

Exec Applications for the 2022 School Year - Link - <https://doodle.com/poll/hnxx2666zsr44vv#table>
Start Date: Mon, Nov 1, 2021 6:00 AM EDT, End Date: Sun, Nov 21, 2021 11:59 PM EST
Total Submissions: 27 Pending: 26 Approved: 1 Denied: 0 Received: 0

Exec Applications for Vacant 2021 Positions
Start Date: Mon, Nov 23, 2020 1:00 PM EST, End Date: Sun, Nov 29, 2020 11:45 PM EST
Total Submissions: 8 Pending: 8 Approved: 0 Denied: 0 Received: 0

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 a submission page for 'Exec Applications for the 2020 School Year'. It includes the submitter's name 'Lindsay Horn', the date 'Mon, Nov 11, 2019 12:00 AM', and the time 'WUOG 90.5FM'. There is a toggle switch for 'Include Unanswered Questions' and links for 'Collapse All' and 'Expand All'. At the bottom, there is a section titled 'Untitled' with a dropdown arrow.

Exec Applications for the 2020 School Year

Lindsay Horn - Mon, Nov 11, 2019 12:00 AM
WUOG 90.5FM

☐ Include Unanswered Questions


[Collapse All](#) | [Expand All](#)

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

You can Approve, Deny, or Edit the submission.


 [EDIT SUBMISSION](#)

Closing Comment (optional)

 [APPROVE](#)  [DENY](#)



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

- 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

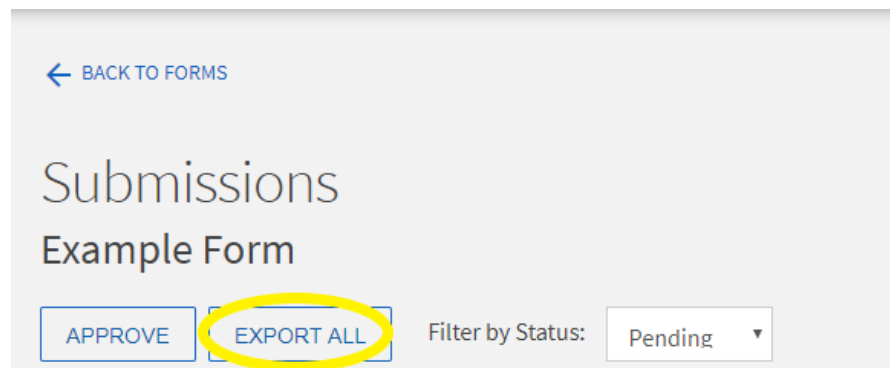
[+ CREATE FORM](#)

[ACTIVE](#)
[ARCHIVED](#)

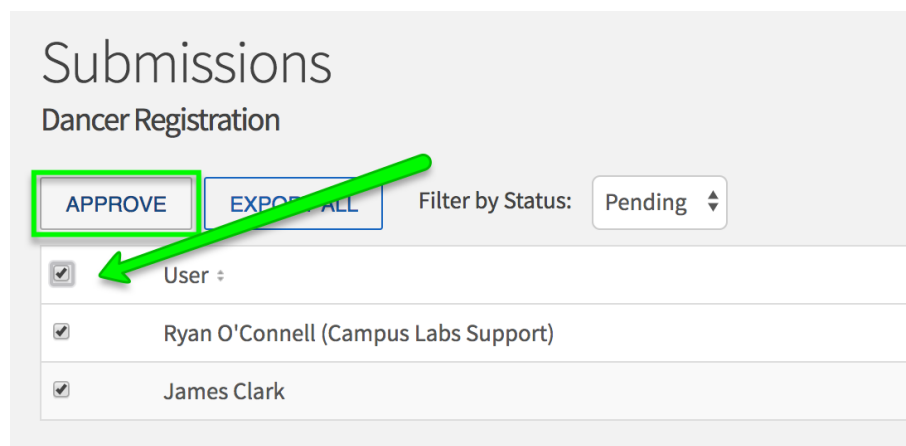
[ARCHIVE](#)

	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	

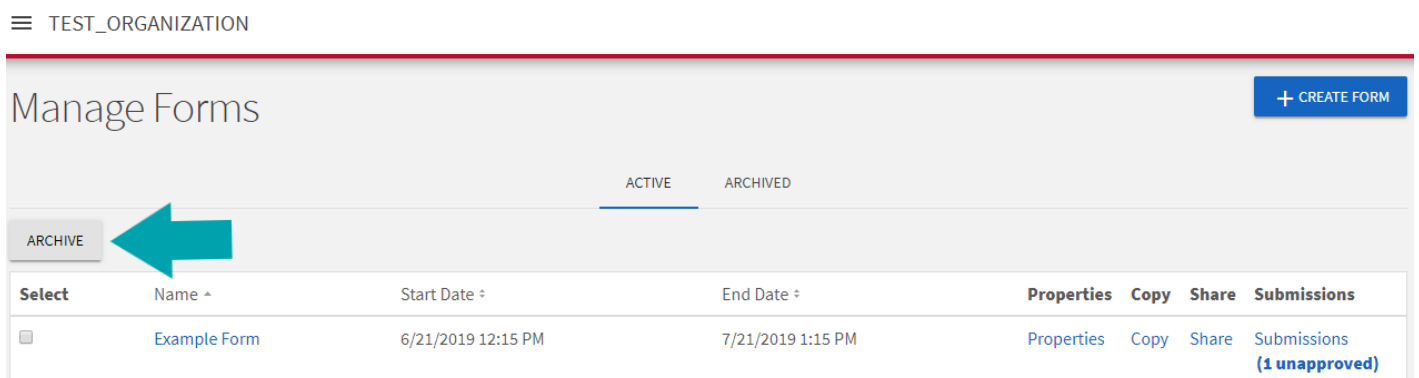
Locate the “Export All” button at the top of the page. These submission exports run through a queue and you will receive an email as soon as the report has been processed.



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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