

WILLIAM & MARY TribeLink

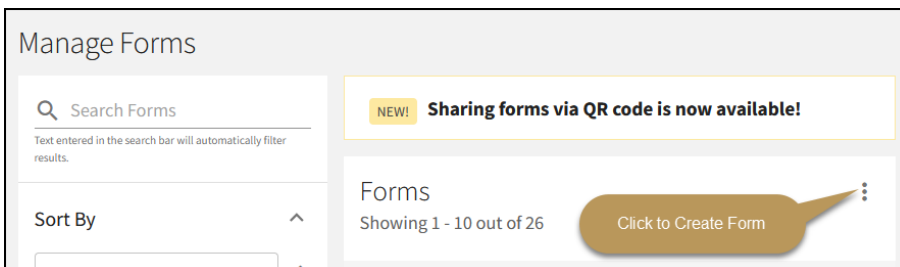
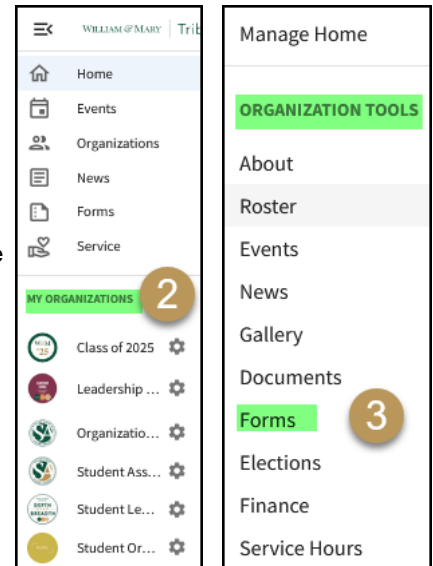
How To Create and Manage Forms

General Instructions to Access the Form Builder

To create and manage organization forms, you will first need to access the organization's Form Management page within TribeLink. Here are some instructions to get to that page, instructions for the specific functions can be found throughout this resource.

- 1) Log into TribeLink
- 2) Click on the gear icon next to your organization name in the left hand manu on your screen under "My Organizations"; this will open a menu of organization tools. If you have not expanded the left hand menu, click on the organization profile picture and this will open the menu of organization tools
- 3) Select "Forms"

From the Forms page, you will be able to build forms for your organization's use as well as check on the submissions from existing forms.



After you have landed on the Forms page, you can click on the three dots then "+Create Form" to start building a new form. Or you can manage existing forms, review submissions, approve/deny submissions, etc. There is also a search feature to find existing forms.

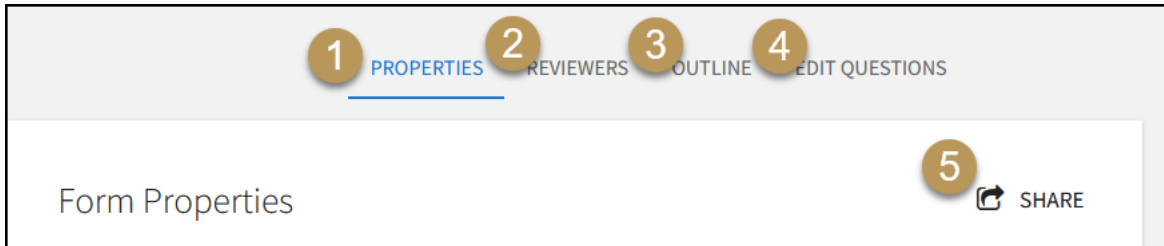
Creating a New Form - Properties

Form Properties

- **Name** - Give the form a name that will make it easy to identify in a list of forms (you may end up with several forms active at the same time).
- **Status and Start/End Time** - Determine the window of time you want the form to be active/available for submissions - leave this as "disabled" until your form is built.
- **Include in Explore Forms List** - Enabling this feature will list your organization on the community's public forms list, in addition to being displayed on your organization's TribeLink page.
- **Require Review and Approval Process** - There are two options for assigning "statuses" to submitted forms.
 - Enable Review and Approval Process - submitted forms are assigned to "Pending" until the admin takes action (approve or deny)
 - Disable Review and Approval Process - submissions will be listed as "received" with no further action required
 - This is also where you determine the Review Workflow; you can identify reviewers after the form has been created
- **Allow Submissions from Public Users** - Enabling his feature allows you to collect submissions from people without requiring they log-in to TribeLink (this is good for colleting information from non-W&M affiliated individuals. You can also require they provide a name/email OR you can collect anonymous submissions
- **Allow Multiple Submissions** - Enable this if you want to allow individuals to submit this form more than once, otherwise it will limit them to only one submission.
- **Submitter Identified Reviewers** - You can allow individuals submitting forms to identify their own reviewers
- **Position Restrictions** - After the form has been created this will be available. You can restrict the form to only members of the organization, or to specific members. If you don't want to restrict it to only members/leaders of the organization, leave this feature "disabled". You can also manage who can review the form submissions and whether are notified with each submission. Only those with the appropriate management levels will be able to review and/or manage submissions.

Make sure you click the "Save" button towards the top of the screen

After initially setting up the form, you will be able to update the form properties (1), add reviewers (2), review the outline of questions (3), add/edit questions (4), and when it's done you can share the form link/QR code (5).



Adding/Editing Questions

Question Types:

There are eight options for you to choose from when adding questions:

- Check Box List - respondents can select several choices from a list; you can set minimum and maximum number of choices that respondents can/must select
- Radio Button List - respondents will only be able to select one option from a list
- Text Field - respondents will be able to provide a text response; you can determine how large the text field is
- Drop Down List - respondents will only be able to select one option from a drop-down list
- Instructions - this is how you can provide some instructions/descriptive text without asking for a response
- Single Check Box - respondents will need to check this box in order to continue; it is a required field when selected
- Ranking - respondents will be able to prioritize multiple answers; you can determine the maximum number of items respondents can rank
- File Upload - respondents can upload a file, like a document, resume, responses, photo, etc.

After you've identified the question type that is most appropriate to use, you'll establish the question "properties:" the question itself, response options, whether the question is required or not, and maximum/minimum responses (if applicable).

Answer Text Options:

After you've established the question properties, and created the question, you will have the opportunity to edit the answers to include additional information like:

- Text Area - this creates additional space for users to write-in an answer
- Additional Text - includes an information icon, when clicked additional text/information about the answer choice is displayed in a pop-up
- Tool Tip - similar to the "additional text" information is available, however you will not need to click an icon, simply hover over the answer text
- You can an image in either the "text" of the answer or in the "additional text." The photo must be hosted somewhere and have an image URL, we recommend hosting those photos in your organization's photo gallery in TribeLink.

What are Pages?

Pages are an easy way to break up your form into more consumable chunks AND if you need it, you can use pages to build in conditional logic or skip logic. This is when you have some questions that are only relevant/applicable if a respondent answered yes to a question, but not if they answered no for example. By clicking on "page properties", you can name the various pages and decide if you want to show the "back button" or not.

Adding Form Logic/Conditional Formatting

From the second page onward, you can add conditional or skip logic to a form. This allows the submitter to see only the questions that are relevant to them, based on their responses.

- Select the page for which you want to set conditions and click "Page Properties," and click on the "Conditions" tab in the window.
- Click "+add a condition" and select a question that exists in the form on a previous page. Select an answer choice and then complete the logic statement. When adding conditions, you select the question/answer combination that leads one to the current page.
- Multiple conditions can be set, and there is a choice to require all conditions or only one by connecting the conditions with either AND (for all conditions) or OR (for at least one of possible conditions).
- Note: you can't apply conditions to the first page of a form, since there are no previous pages/questions. ***For more detailed information on adding conditions/logic to your form, please visit the Engage Help Center.***

Sharing Forms

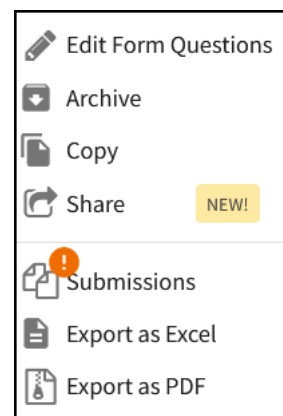
After you have built your form, you are ready to share it and make it available to receive submissions. Make sure the form properties are set to active and that you are currently in the time frame. You can share the link or QR code with users, the form may also be available on your organization's page for users to fill out. *Helpful hint - triple check your form to make sure you've included all the questions you need and that it is set up properly. Once you begin to receive submissions, it is not recommended you make any edits/changes to your form, beyond minor text edits (like spelling mistakes).*

Managing Forms and Reviewing Submissions

To access the Form Management tools, click on the three dots for the Form. If there are any submissions that require action (review/approve/deny) there will be an orange dot. This will open a menu of tools.

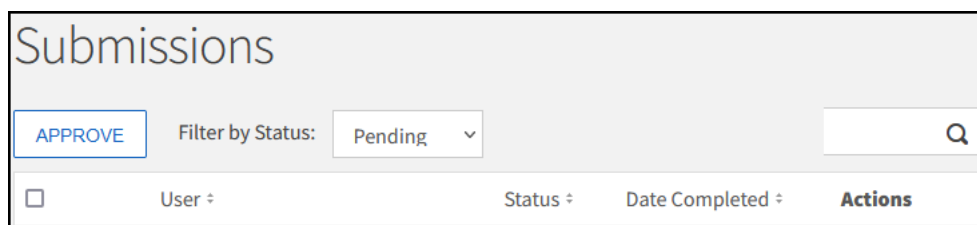
Form Management Tools:

- Edit Form Questions - If you need to add/edit any existing questions, this is a shortcut to access that feature. It is recommended that you NOT edit any questions after responses have been submitted other than minor spelling or grammar fixes.
 - If you need to edit any properties/reviewers (like the end date), click on the actual form name on the menu and not the three dots.
- Archive - Once a form is no longer needed, you can archive it. Forms can't be deleted, simply archived.
- Copy - You can copy forms; this will only copy the properties and the questions, it will not copy any responses/submissions
- Share - This is where you access the link or QR code that you can provide to people so they can fill out the form.



Review Submissions:

- Submissions - this will take you to a list of the form submissions where you can see the user who submitted, status of the form, date it was completed, and actions (view).
- The status filter will default to Pending; if you did not enable "Review and Approval Process" you will want to change the filter to "Received" in order to review those submissions. You can filter by Approved and Denied after action has been taking on Pending submissions..
- Click "view" to review the submission. What you can do after you have reviewed the submission will depend on how you set up the form. You can also print each individual submission when you review it; or you can print to PDF if you'd like to save it electronically.
 - If "Review and Approval Process" was enabled during set up, you will be able to approve or deny the submission. When you approve or deny a submission, you have an opportunity to leave the user a comment about why the form was approved or denied, or any other information you wish to communicate. You may also leave comments for additional form reviewers in your organization via a discussion box.
 - If "Review and Approval Process" was not enabled during set up, you can't approve/deny, you can just view the submission.
- Export as Excel - this will generate a spreadsheet of all responses
- Export as PDF - this will generate a Zip folder of all the submissions that you can download to save or print.
- All exported submissions will be accessible to you in your "Downloads" under your user drawer (click on the profile picture in the top right corner).



Additional Questions?

Email tribelink@wm.edu or check out the Engage Help Center for online resources like:

- [Forms Walkthrough](#)
- [Adding Logic to a Form](#)
- [Publishing a Form](#)
- [Managing Form Submissions](#)
- [Printing and Saving Form Submissions](#)