

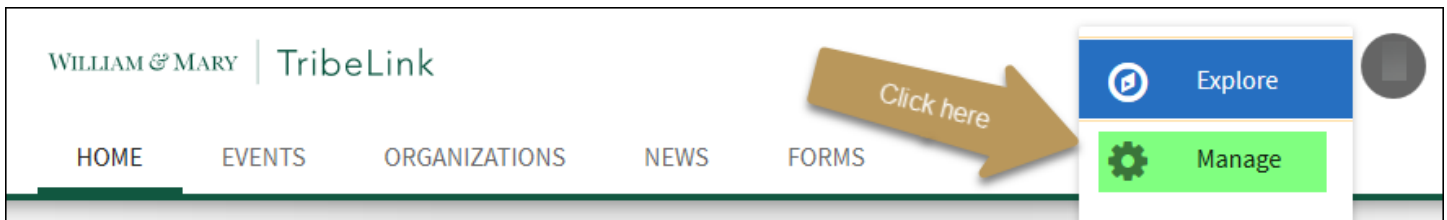
WILLIAM & MARY TribeLink

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) Select "Manage" using the grid shaped icon in the top right corner of the screen - this will take you to the Action Center



- 3) In the Action Center, select the organization you would like to manage
- 4) When you are on the organization's home page, you will use the menu on the left hand of the screen to access the various management functions you have
- 5) 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 blue button "+Create Form" to start building a new form. Or you can manage the form, review submissions, approve/deny submissions, etc.

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 - don't click the "active" checkbox until your form is built.
- **Submission Approval Process** - There are two options for assigning "statuses" to submitted forms.
 - Enable Approval Process - submitted forms are assigned to "Pending" until the admin takes action (approve or deny)
 - No Review Required - submitted forms are automatically marked with the Received status and no further action is required.
- **Public Submission Collection** - Checking this box allows you to collect submissions from people without requiring they log-in to TribeLink (this is good for collecting information from non-W&M affiliated individuals. You can also require they provide a name/email OR you can collect anonymous submissions
- **Multiple Submissions** - Check this if you want to allow individuals to submit this form more than once, otherwise it will limit them to only one submission.
- **Reviewer Workflow** - You can create layers of review as part of the approval process; add individuals to review the submissions
- **Submitter Identified Reviewers** - You can allow individuals submitting forms to identify their own reviewers

Other form properties- 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, don't select any boxes of the "restriction check boxes". 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.

Creating a New Form - 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.

Creating a New Form - Adding Form Logic/Conditional Formatting

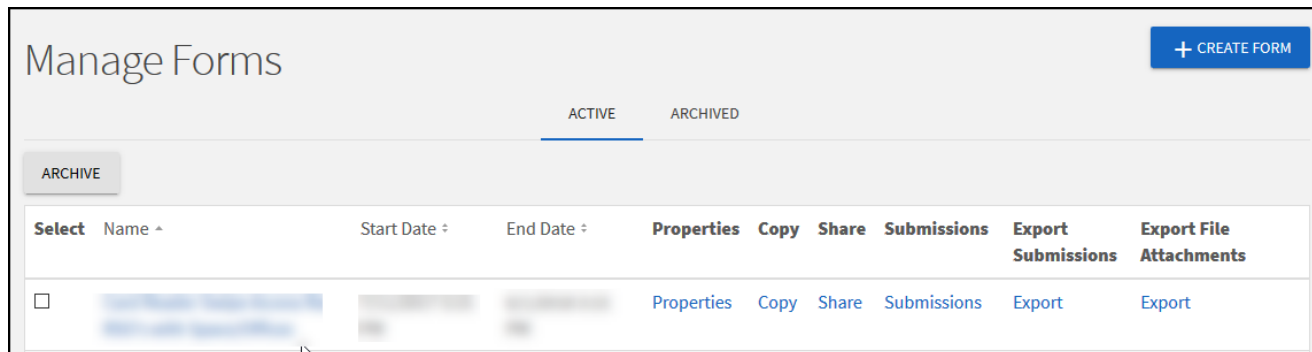
From the second page onward, you can add conditional or skip logic to a form. This allows the submitter to see only the questions that are relevant to them, based on their responses.

- 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.***

Publishing Forms

After you have built your form, you are ready to publish 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 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



Review Submissions:

Start by identifying the form you'd like to manage, then click on "Submissions" for that form. You can filter by status of the form submission: pending, approved, denied, or received.

- Once a form is submitted, it is marked as "Pending" or "Received" depending on how you originally set up the form approval process. 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 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 "No Review Required" was selected during set up, you can't approve/deny, you can just view the submission.
- Export Submissions - in addition to printing/saving submissions for your records as individual PDFs, you can "export all". This will generate an Excel file of all the data submitted via the form, with the exception of uploaded files.
- Uploaded files/attachments can be exported to a Zip folder. After you have "exported all" you can access the Excel spreadsheet under "Downloads" in your right hand user drawer (which you can open by clicking on your profile picture).

Other Form Management Actions:

- 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 that you can provide to people so they can fill out the form.
- Properties - Use this to edit properties like the end date or questions. It is recommended that you NOT edit any questions after responses have been submitted, other than minor spelling or grammar fixes.

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](#)

