FuquaConnect Creating a Form

The Forms tool can be used for a variety of purposes and the easy-to-use tools in FuquaConnect make it easy to move many of your current paper-based processes into your organization. This guide will walk you through each step of the process for creating a new form in your organization.

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Why FuquaConnect Forms vs. Qualtrics/Google forms

FuquaConnect's forms tool is an easy-to-use feature used for a variety of purposes. Any forms or surveys your club or organization uses will be easily accessible to anyone with administrative access to your page, without any additional steps to share the form or data with others. The below information breaks down the key differences in a few survey/form tools so you can make the decision about which option serves your organization's needs the best.

Features	*FuquaConnect forms*	*Qualtrics*	*Google forms*
Integration with club/org. FuquaConnect page	Yes, full integration	No	No
Complexity	Intermediate/intuitive	Complex/unintuitive	Simple/intuitive
Question formats	Check Box List, Drop Down List, File Upload, Instructions, Radio Button List, Ranking, Single Check Box (e.g., "click to agree"), Text Field, Open Ended Response	Constant Sum, File Upload, Form Field, Graphic Slider, Matrix Table, Multiple Choice, Pick, Group, and Rank, Rank Order, Side by Side, Slider, Text / Graphic, Text Entry	Check Box List, Drop Down List, File upload, Linear scale, Multiple choice, Paragraph, Short answer
File Uploads	Yes, 1 file upload per question	Yes, 1 file upload per question	Yes, up to 10 file uploads per question
Survey Logic	Yes, between pages	Yes, in page and between pages	Yes, though limited functionality
Exports submission data	Yes, built in, exports as CSV. Saves export in downloads folder in FuquaConnect, with option to download and save on computer.	Yes, built-in and exporting functionality. Exports as CSV, TSV, Excel, XML, SPSS, Google Drive, User-submitted files (Zip). Will save on computer.	Yes, limited built-in with graphs, exports as CSV. Will save on computer.
Email Notifications to selected users when submissions received	Yes, add reviewers	Yes, but must have email notifications enabled.	Yes, add reviewers
Sharing	Yes, via link or auto-generated QR code	Yes, via link, email, socials, QR code & downloads	Yes, via link, email, & socials

Note: FuquaConnect Forms, Qualtrics, and Google Forms are all adequate survey platforms to use for data collection. However, FuquaConnect forms are 100% integrated in FuquaConnect, all club admins have access to Forms by logging in with their NetID's, allows historical record keeping, and stores all data in one convenient location (your club/organizations FuquaConnect page).

Step-by-Step: Creating a Form

Navigating to your organization's Action Center

1. Search for your organization in the search bar or select it from your list of memberships on the FuquaConnect home page.
2. Click **Manage Organization** in the top right. A new window will open to your **Action Center.**
3. Alternatively, you can also navigate to your organization's **Action Center** by clicking the **Sidebar Icon** next to the FuquaConnect logo on the top left of your home page. Scroll and locate the **My Organizations** section and click the **Branch Icon** next to the organization you are creating an event for – Click **Forms**.
4. All active forms in your organization will be listed here. Click the **View More Details Icon** on the top left and select **+ Create Form.**
5. In the **Manage Forms** view, you have access to edit previously created forms by clicking on the **View More Details Icon** located beside each form and **click Edit Form Questions**.
6. This is the same place you can **archive**, **copy** or **share** the form. You can also **view submissions and export submissions as an Excel file**.
   a. The **orange icon** signifies that there are submissions needing to be reviewed by either **denying** or **approving.**
   b. More information on these options can be found later in this guide.

Quick Tips – Form Facts:
1. FuquaConnect Forms are simple ways to create a paperless document for your club!
2. Creating a form can feel really complicated at first, but once you get the hang of it, it becomes easier to use!
3. Forms are NOT anonymous, the data will automatically collect first name, last name of all signed in users.
4. Forms are a great option for simple surveys and data collection.

Form Properties - Settings

The first page of the Create Form function allows you to set the basic details for the form – name, status (timing), etc. Below we break down each field of this form and some recommendations for you to consider as you create a form in FuquaConnect.

1. **Form Name:** This is the name or title of your form – Pretty self-explanatory 😊
2. **Form Status:** This is where you make the form visible to the FuquaConnect community. If the Form Status is "Disabled", the form is not visible, even if the active dates are current. Enabling the form status will make the form live to users.
3. **Include in Explore Forms List:** If this option is enabled, the form will be listed on the FuquaConnect public forms list and will make the form easier for users to find and fill out.
4. **Require Review and Approval Process:** *Enabling this function* will automatically put each submission through an APPROVAL/DENIAL process where they are pending until processed. *Disabling this function* will automatically mark each submission as RECEIVED without any approval process.
5. **Allow Submissions from Public Users:** Enabling this option means anyone, including those who do not have an account in FuquaConnect, is able to fill out the form. Note: Enabling this option automatically enables Allow Multiple Submissions. *OSL only recommends enabling this function when you need to collect submissions from individuals outside of the Fuqua community, like prospective students. If the form is exclusively for members of the Fuqua community, then we recommend keeping this option disabled so that users must login before submitting the form. For logged in users, FuquaConnect forms will automatically capture their first and last name as part of any form submission, so you do not need to ask for this on the form.*
6. **Allow Multiple Submissions:** If this option is enabled, multiple form submissions are allowed. *OSL does not recommend enabling this function unless multiple submissions are appropriate.*
7. **Submitter Identified Reviewers:** When enabled the submitter may specify up to five reviewers for their individual submission by providing their emails. *OSL does not recommend enabling this function.*

8. **Restrict to Submissions from only Members of this Organization:** When enabled only members of the selected organizations can submit to this form. By default, all forms are open to and able to be completed by EVERYONE at Fuqua unless this option is enabled.

Once the form details have been entered, disable, enabled, etc. click the **SAVE** button on the top right.

Upon clicking the SAVE button, new form options will appear: REVIEWERS, OUTLINE and EDIT QUESTIONS.

Form Properties - Reviewers

Reviewers exist to help organization administrators review the content of a user's submission and give their opinion about whether they think a form submission should be approved or denied. They do NOT have the capability to approve or deny submissions.

Note: Anyone with full admin access to your organization will be able to create forms, review form submissions, and approve/deny forms. The Reviewer tool allows administrators the access to assign specific users to receive notifications when new submissions are received. *For example: If you create a form to use for prospective students to contact your club, then you can set your admissions rep(s) as the reviewers, and they will be notified each time a form is received so they can take action.* Reviewer feedback helps inform or influence the form administrator's decision on a submission (approve/deny).

Reviewers can only be added to forms with the approval process **enabled**.

1. Click the "Add Reviewer" person-shaped icon.
2. Add reviewers to the form by clicking their name. These reviewers will receive notifications about new submissions and will have access to view and comment or vote on form submissions.

Form Properties - Outline

When the form has been built, the outline section will show a summary view on what your form looks like to users.

Form Properties - Edit Questions

This is where the form building begins! Review available question types for form building below:

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 (i.e.: Zip Code, Phone Numbers, etc.).
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 are a plain text field and do not require any action on the part of the user.
Single Check Box	Think of this as a method to provide the user with 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.

Note: Any time you add a question to your form or change a setting, the changes will be saved in real time.

Quick Tips: Forms – Tips & Tricks

1. Pick the right question types for the data you are trying to collect.
2. Help users identify the length of open-ended answer you are looking for with your text field size.
3. Determine which questions are genuinely required.
4. Use logic to ensure users see only the questions they need to answer.
5. Consider if your form needs an approval/denial process.
6. OSL recommends including a form question to capture contact emails for all form submissions.

Building Form Questions

When you are ready to start adding questions into the form, review the list of question types that are available. Each of these question types serve a unique purpose – Reference table above.

1. On the form builder page, at any time, you can jump back into the settings by clicking **Form Properties**. In addition, you can jump to additional pages of the form by clicking **Page List**. To name the page, click **Page Properties**. The name of each page will be visible to users filling out the form.
2. Select a question that makes the most sense to start your form - Reference table above. We *recommend starting with the **INSTRUCTIONS** question type to provide an explanation for the form.* Simply, click on the question type you wish to use and a pop out window will appear for data input.
3. When a question type has been filled out, it is now a part of the form. There are several options on the header of each question type in your form:

    a. **Blue Edit Icon:** Once a question has been created, you can click this button to view additional question options.
    b. **Page:** This indicates what page this question is on within the form.
    c. **Sequence:** This indicates the order of each question type on the page. This is where you can easily re-order the questions in your form.
    d. **Blue Delete Icon:** Click this if you want to delete the question type from your form.
4. Once a question has been created, additional options will become available. Access the additional options by clicking the **Blue Edit Icon.** View the below table for a breakdown of additional options:

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.
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.

	By clicking the information icons, the linked photo/file will pop up.

**Option only available using the Check Box List, Radio Buttons and/or Ranking question types.*

5. Adding Question Logic - If your form includes multiple pages, you can add conditional logic to ensure the form is efficient for all users. The form builder utilizes page logic which means you can present the submitter a page of questions based on their answers to questions on an earlier page. *Important Note: This is not the same "in-page logic" that Qualtrics offers.*
    a. Configuring logic can seem overwhelming, but the more you use this feature the more you will understand how it works!
    b. To access conditional logic, input all form questions and details. Once this is complete go to the first page in the form that needs to be setup with logic and click **Page Properties**.

OSL highly recommends testing the form before sharing with intended audiences, by completing it from all angles to ensure the form flows efficiently, all logic works, etc.

1) Click the tab **Conditions** to link and create logic.
2) Click **Add Condition**
    a. Choose the form question, answer, and parameter that logic should be applied to.
3) Once all conditions have been selected, click **OK**. The form will automatically save and go to the next page in the form.

    c. Let's review an example of question logic in action – see below:

        Page 1 of the form (from perspective of form submitter):

        Page 3 of the form (from perspective of form submitter):

        **Since the selected answer to the first question was "FY – Class of 2024" the forms logic skipped page 2 and went straight to page 3.*

6. Publishing a form – Once the form is ready to disseminate, you must ensure the following settings are correct and selected.
    a. Form Status
        i. Must be **ENABLED**
        ii. Active From & Active Until dates must be within correct time range.

Sharing and Managing Form Submissions

1. **Sharing Form:** *To share a form you must be on the **Manage Form** page.*
    a. Click on the **View More Details Icon** (⋮) located beside the form you want to share and click **Share.**

    b. A pop up will appear with sharing options:
        i. Share via URL
        ii. Share via QR Code

    c. Forms cannot be shared using the URL when actively filling out a form. This link is unique to the user.

d. *Note: If there is a blue box stating "This form is not currently accepting submissions…" in the pop-up window, the form is NOT active and cannot receive submissions. You must enable the form and/or set a date range that is appropriate - View details here.*

2. **View Form Submission:** New submissions are noted with an **orange icon** and signifies that there are submissions needing to be reviewed by either **denying** or **approving.** NOTE: If you do not have the approval process enabled for form submissions there will NOT be an orange icon noting new submissions, as these types of submissions are automatically marked as "received". Jump to the **Review and Approval Process section** to learn more on this topic.
   a. Click **Submissions**, a new page will load.
      i. Click on the **View More Details Icon** (⋮) located beside the form you want to review and click **Submissions.**
      ii. Review all pending or received submissions using this feature.
      iii. You can review, approve/deny all submissions individually, and search for specific submissions.

Quick Tip: The **My Downloads** page is always accessible by clicking on your photo at the top right of any FuquaConnect webpage and selecting "My Downloads" in the menu.

3. **Export Form Submissions:** There are two options for exporting the form data. Export as Excel **and Export as PDF** – *OSL recommends exporting as Excel, unless you need to have individual documents for each submission (e.g., liability form copies).*
   a. Click **Export as Excel**, a blue banner will appear at the top of the webpage. Click the **Go to Downloads** button.

   b. You will be redirected to the **My Downloads** page.
      i. Click the download button to download the Excel file containing all submission data.

      ii. After you request a file from the system and it is has been successfully retrieved, you may download the file – It will download as a .csv file on your computer.
      iii. All requested files remain available until deleted. Click the trash can button to delete files. Files are **not** retrievable once deleted.

4. **Exported Data:** Data will export as a .csv file, which can be opened using Excel.
   a. Static data that will always export:
      i. SubmissionId, DateSubmitted, Username, First Name, Last Name, Status, Comment, Updated By, Updated On, Revisor
   b. The remaining data will include the form questions and answers. View a sample of exported data here.

And you are done! You now have the tools to create, edit, share, and download data using the Forms feature!