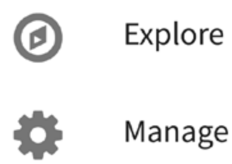
Forms Management Walkthrough

Creating a paperless organization is easy in OrgSync - take all your forms online using the Form builder! The Forms tool can be used for a variety of purposes and the easy-to-use tools make it easy to move many of your current paper-based processes into your organizational page.

Accessing the form builder

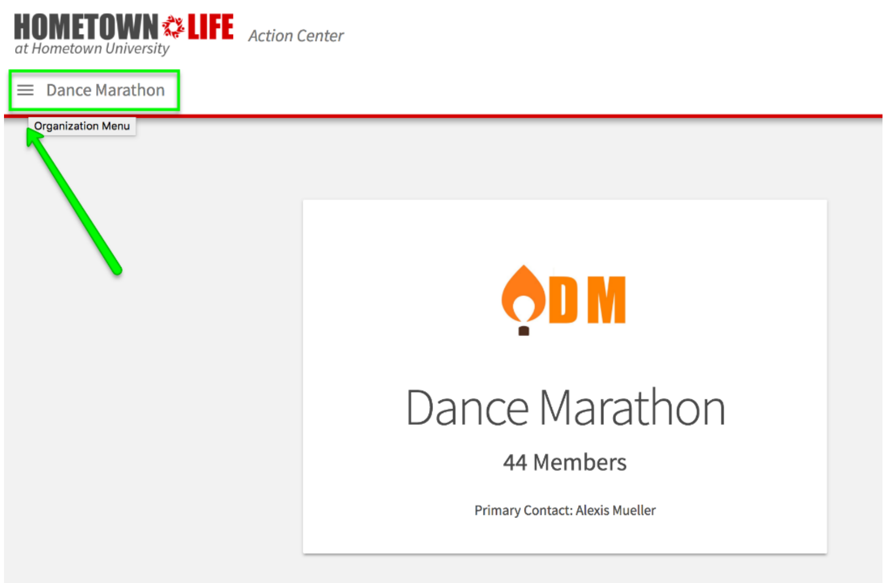
If you're looking to build a form for your organization, first navigate to your organization's Action Center. Click on the Switchboard:

… and then "Manage."

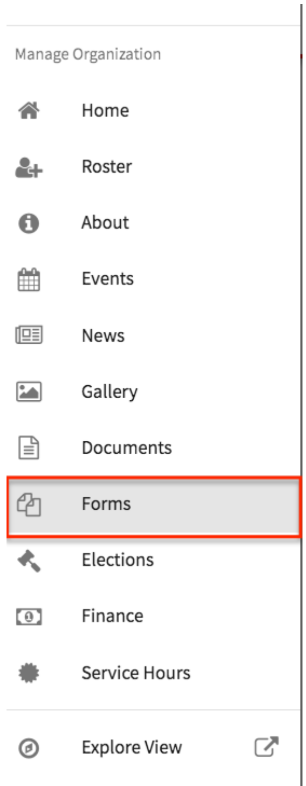


When you land in Action Center, select the organization you want to manage to take you to the Action Center Home for that organization.

At the top left hand corner underneath the community logo (in this case, Hometown Life), you will see the name of the organization next to a menu icon:



Click on the organization name and then select the *Forms* tool from the organization tool menu.



Then, click *+Create Form* button at the top right of the page. Note that you will only see the *Forms* tool or the *+Create Form* button if you have been given the appropriate access in your organization.

Creating a form

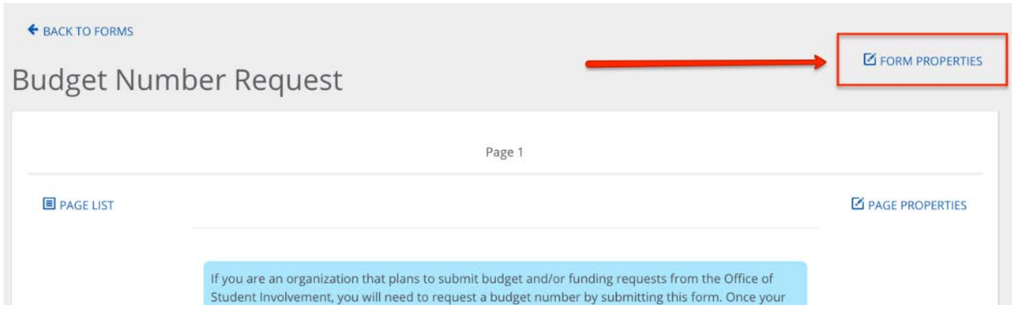
Basic form properties

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 Multiple Submissions	Users can submit more than one submission of this form. 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. 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.

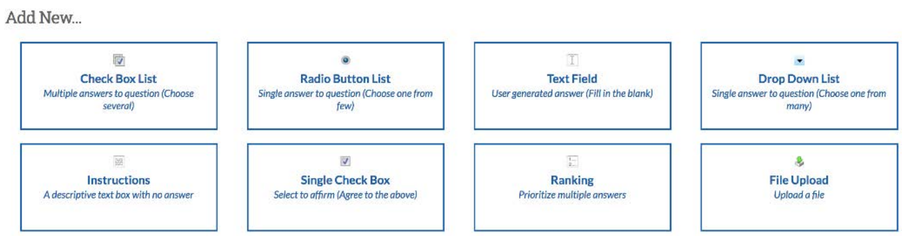
Building your form

After you determine the settings for your form (which is called “Budget Number Request”), you’ll be taken to the form builder and you will land on the first page of your form. At any time, you can jump back into the settings by clicking *Form Properties* in the top right of the page.



In addition, you can jump 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’re ready to start adding questions into the form, look at the list of question types that are available and select one that fits your needs. Then follow the instructions in the question box and click “OK.”



Each of these question types serve a unique purpose. See below for a complete explanation of each. Note that any time you create a question on your form or change a setting, these changes will save in real time.

Question Type	**Function**
Check Box List	Multiple choice question that allows users to choose more than one option (i.e., select all that apply).
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	This is 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.

For each of the question types, you also have additional question options. After 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.

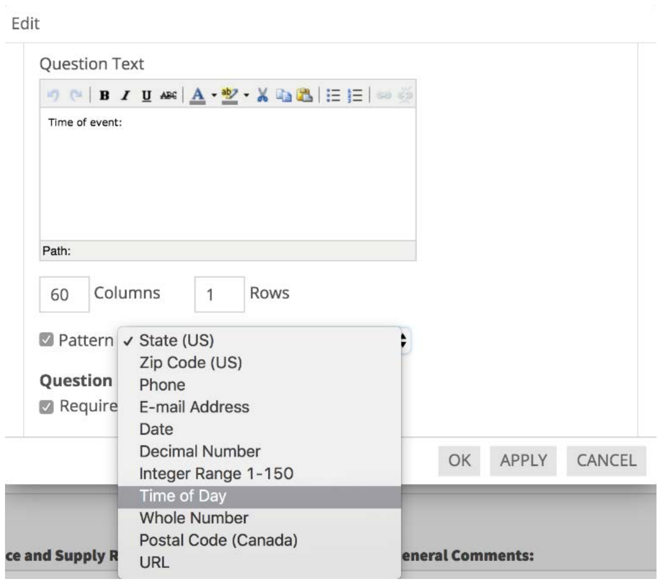
Question Setting	**Function**
Required	Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.
Shuffle Answers	For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For 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 users to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice for users to see.
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.

Validation

You can also ensure responses follow a particular format, including phone number, date, time, and e-mail address, using a validation setting. When you select the “Text Field” question type within forms, select the check box next to the "Pattern."



Then, choose how you would like that particular question to be validated using the dropdown menu. Your pattern options and their validation descriptions are listed below:

Pattern	**Validation Setting**
State (US)	Enter a valid state abbreviation.
Zip Code (US)	Enter a valid zip code.
Phone	Enter a valid phone number in one of the following formats: (425) 555-0123, 425-555-0123, 425 555 0123, OR 1-425-555-0123.
E-mail Address	Enter a valid email address.
Date	Enter a date in the following format: 12/12/2001
Decimal Number	Enter a positive number.
Integer Range 1-150	Enter a number from 1 - 150.
Time of Day	Enter a time between 12:00 and 11:59.
Postal Code (Canada)	Enter a valid Canada postal code.
URL	Enter a valid URL.

Users who do not enter an answer in the correct format will be prompted with information about the required format.

Adding question logic

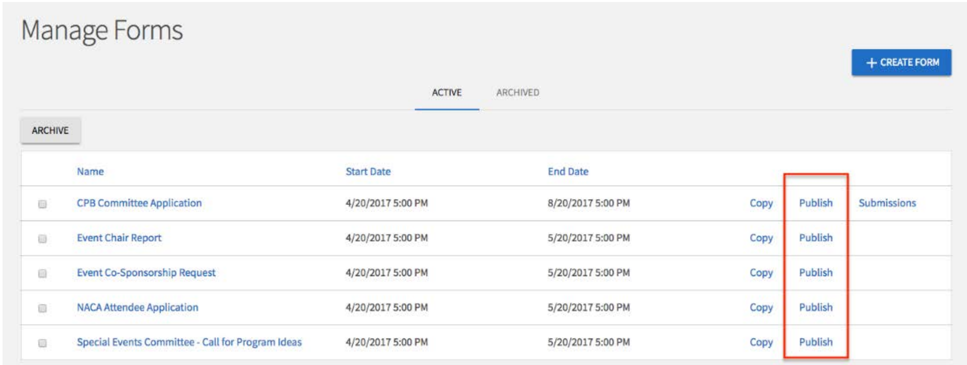
Adding form logic is easy. The form builder utilizes page logic, which means you can allow the user to view a page of questions based on their answers to questions earlier in the form. Click here to access the “Adding Logic to a Form Quick Tips” to learn more about this process.

Adding reviewers

When you are done building your form, you can identify if anyone needs access to give feedback (not approval or denial) on form submissions. Read more about setting up form reviewers here.

Publishing and Managing Submissions

After creating the form and configuring the settings, you're ready to publish it so that it's visible to applicable users. Navigate back to your full list of forms. To the right of your form you will see the *Publish* option.



Make sure your form is Active and copy the URL provided in the text box. You'll need to click *Publish Form* if you changed the status. Next, distribute the form link to whomever should complete it. As you start receiving submissions, you'll receive notifications assuming you added yourself under the Notifications tab. Learn more about managing incoming submissions by clicking here and accessing the "Managing Form Submissions Quick Tips".