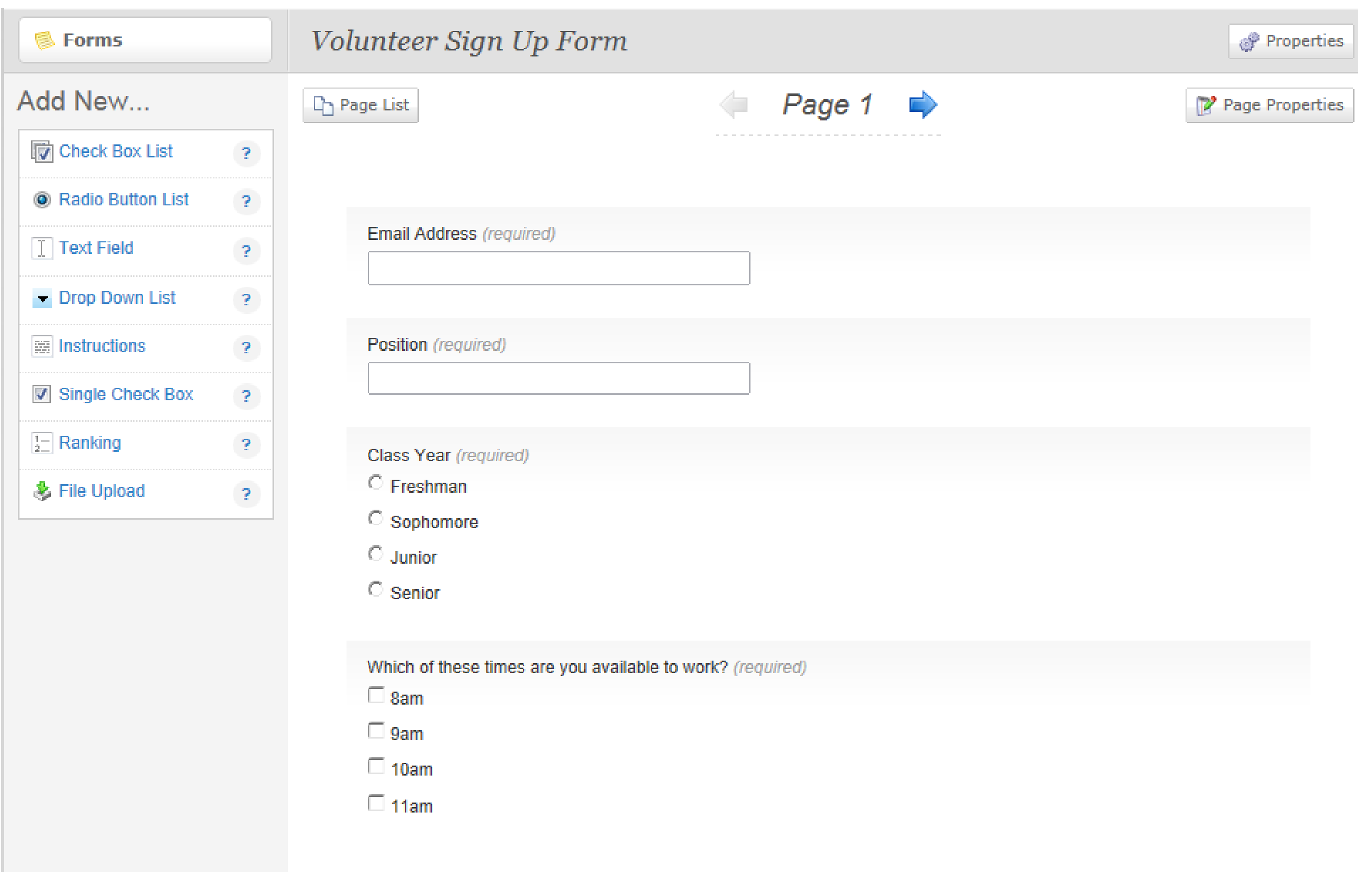
Instructions for Using Forms:

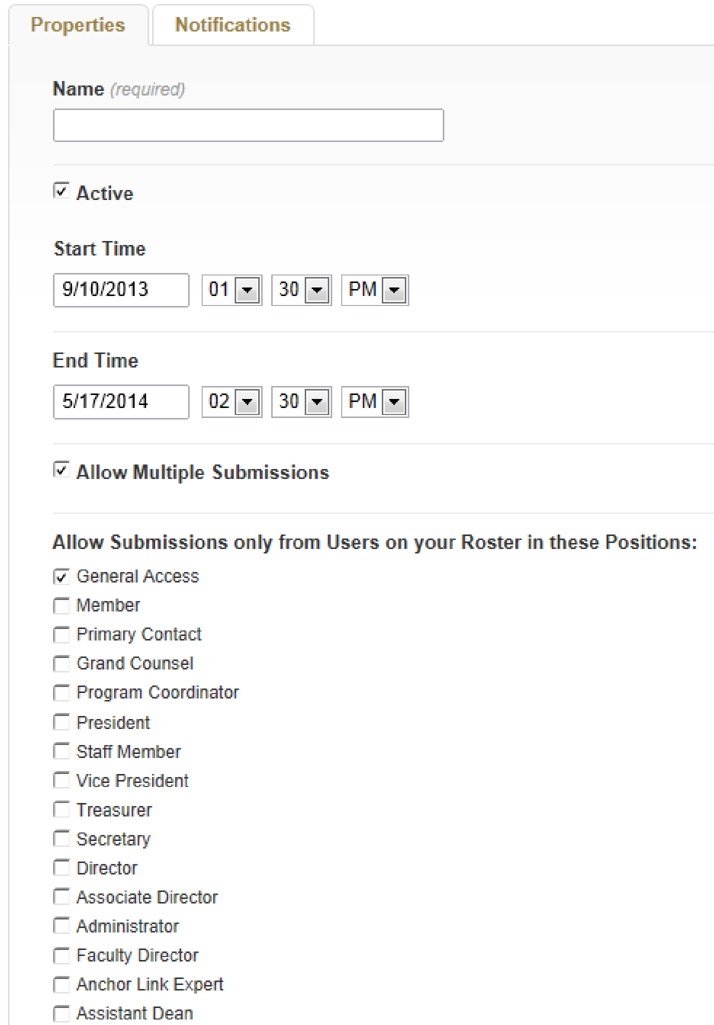
How to Create a Form:

- In order to create a form, you must have administrative access to the Forms feature within Anchor Link. Officer positions can be created and access levels can be set by the President of your group or anyone with All Access.
- To create a form:
    1. Go to your organization's group in Anchor Link.
    2. Click "Forms" on the left side bar.
    3. Click "Manage Forms" which will appear under "Forms" on the left side bar.
    4. Complete the basic form information and designate who you want to have access to completing the form (additional details about form properties below).
    5. Click "Save and Add Questions."
    6. Use the "Add New" section on the left hand side to add varying types of questions, instructions boxes, or a file upload button. You can reorder any questions after creating them.
        - Note: The default for all questions is to be required. If you want a question to be optional, click on the question then click the "Edit" button. Then uncheck the "Required" box under Validation.



Details about Form Properties:

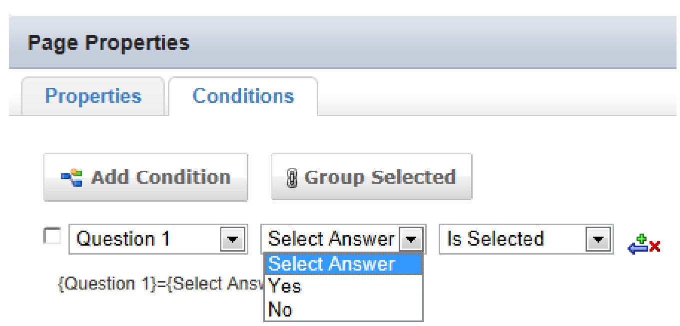
- **Active:** Your form will only be live when the Active Box is checked AND during the time frame you set for the start and end times.
  - When this box is checked the form will not go live until the designated start date but it will automatically turn on at that time.
  - Generally, the only reason you would uncheck this box is if you need to temporarily or unexpectedly turn off your form.
- **Start Time/End Time:** Your form will be live during the time frame you designate here (so long as the Active box is checked).
- **Allow Multiple Submissions**: Check this box if you would like to allow users to complete this form multiple times.
- **Allow Submissions only from Users on your Roster from these Positions:** You have the ability to designate who you want to have access to complete the form here.
  - **General Access:** To allow any user to be able to access a form, select “General Access”. Users will still have to log into the system but they do not have to be a part of your organization. Only people with VUnet IDs can access forms.



- **Notifications:** Under Properties, there is a “Notifications” tab where you can select users that you would like to be e-mailed every time a form is submitted
  - Only users with the appropriate level of access (designated in the Roster section) will be able to view forms.
  - You are not required to have anyone notified when forms are submitted.

Creating Multiple Pages & Using Skip Logic within Forms:

- You have the ability to create forms with multiple pages. You can have all users complete all pages of the form or you can select which pages a user needs to complete based upon their responses to questions within the form. This feature is called **skip logic.**
  - Ex. If on Page 1 a user answers Yes to a question, they could be directed to Page 2, but if they answer No, they could be directed to a different page or not directed to any further pages.



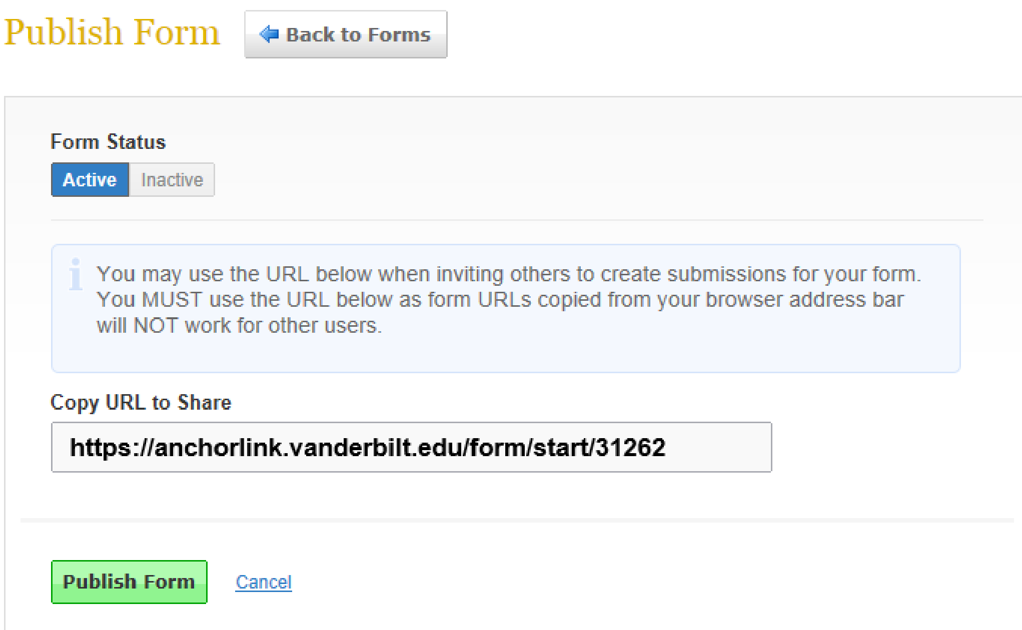
- To create multiple pages:
  1. Create the first page of your form.
  2. Click the “Page List” button in the top left corner.
  3. Click the “Page” button under Add New on the left side bar.

- To set up skip logic:
    1. Open up the page that will be the destination after the question.
    2. Click the "Page Properties" button in the top right corner.
    3. Click the "Conditions" Tab.
    4. Click Add Condition.
    5. Select the question, select the desired answer, and then click "is selected" or "is not selected" depending on what is appropriate for how you would like the form to function.
    6. You can add multiple conditions to group questions/answers with AND/OR criteria if multiple conditions can or must be true to move to a specific page.

How to Distribute a Link to an Anchor Link Form:

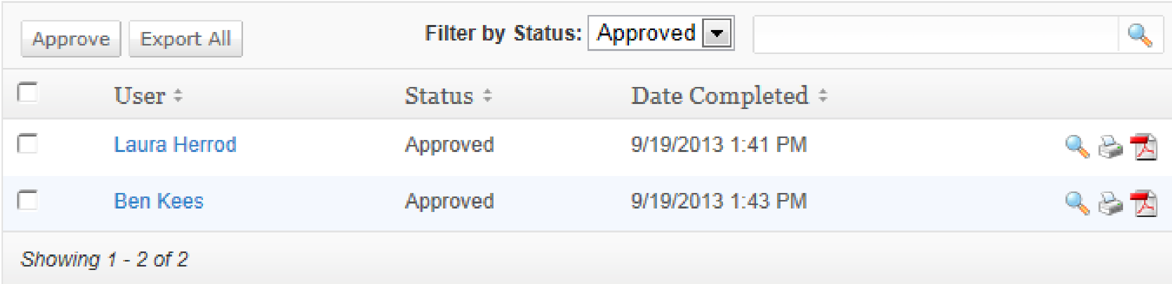
NOTE: Do <u>NOT</u> simply open the form and copy the URL from your address bar. Since every submission is saved, a unique URL is created for each user that opens a form. Your URL will not work for other users

1. Click "Forms" in the left side toolbar then click "Manage Forms."
2. Click "Publish" next to the appropriate form.
3. Use the URL provided in the "Copy URL to Share" box.



How to View Form Results:

1. Click "Forms" in the left side toolbar then click "Manage Forms."
2. Click "Submissions" next to the appropriate form. (If any forms are pending, it will show the number of unapproved submissions.)
3. From here, there are three ways that you can view submissions:
    1. Click on the magnifying glass next to each submission.
        - This method allows you to open up the text fields of the form, gain access to any uploaded documents, and approve or deny the form with comments.
    2. Download as a PDF by clicking on the PDF icon next to each submission.
        - This method is useful when the form includes lengthy text answers or when you'd like to print individual submissions.
        - The PDF version will not include any uploaded files.
    3. Export all submissions into a single Excel spreadsheet by clicking the "Export All" button.



Helpful Tips about Approving Forms:

- If you click the "Approve" button next to the "Export All" button when you are in the dashboard that lists all the pending form submissions, it will just send an e-mail approving the form without any comments.
- If you open the form submission using the magnifying glass next to the form, you have the ability to approve or deny the form and provide a comment (up to 255 characters).
  - The comment you provide will be sent in an e-mail and Anchor Link message to the person who submitted the form.
- You are not required to approve forms if you do not want to. If it takes unnecessary time or you are concerned that approving a form will cause confusion, you can simply leave the submissions pending permanently. Even when forms are pending you can still export all the results into the excel spreadsheet.
- Example: When forms that are used to enter a contest you have two options to prevent confusion when someone sees that their form has been "approved":
  - Leave the form pending indefinitely.
  - Approve the form with a note along the lines of "Thank you for entering our contest. Winners will be notified via e-mail on (Date)."

How to Access Uploaded Files from Forms:

- When you build forms you have the ability to add a file upload button so that a user can provide a photo, word document, or excel spreadsheet.
- In order to access these uploaded files, you must open the form using the magnifying glass next to the submission. The uploaded file will not appear in the PDF version or the excel export.
  - When you open the submission, go to the page where the file is uploaded and then click on the gold file name and it will download.

Archiving Forms:

- When you are done using a form you archive it by selecting it and clicking the "Archive" button so that it does not appear in your list of Active forms.
- When a form is archived new submissions cannot be completed but you can always restore the form if you would like to use it again at a later date.
- You still have the ability access all form submissions even when a form has been archived.