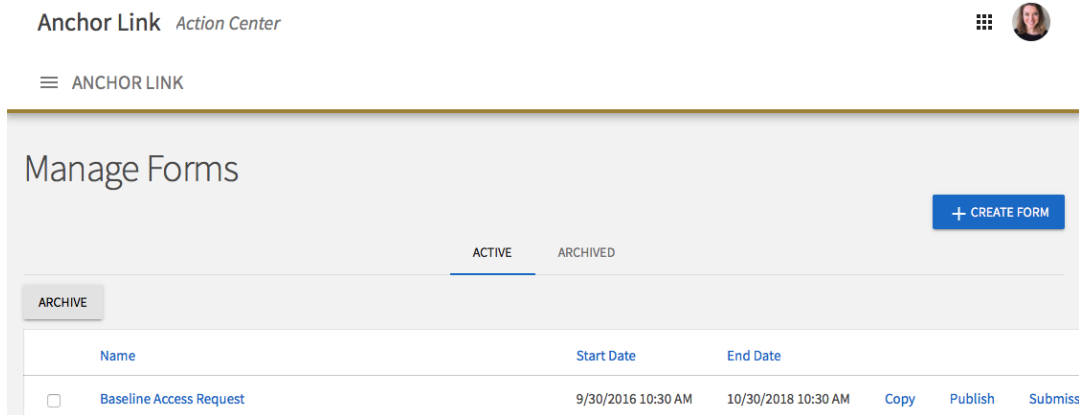


## Forms

### 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. Click **Manage Organization**
  2. Click **Forms**
  3. Click **+Create Form** in top right corner.
  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 bottom 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).

The screenshot shows the 'Create Form' form creation interface. It includes fields for Name, Start Time, and End Time. There are checkboxes for 'Active' and 'Allow Multiple Submissions'. A section titled 'Restrict the form to only allow responses from organization members holding the following positions:' lists various roles like Member, Primary Contact, Associate Director, etc.

- **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:** 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.

## Building Your Form

After you determine the settings for your form, 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.

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# 2016-2017 Ingredient Donation Form

[FORM PROPERTIES](#)

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☰ PAGE LIST [PAGE PROPERTIES](#)

Which of the following ingredients do you volunteer to donate:









Eggs

Flour i

Sugar

When you're ready to start adding questions into the form, take a look at the list of question types that are available to you. Each of these question types serve a unique purpose. See below for a complete explanation of each. Note that any time you add a question to your form or change a setting, these changes will save in real time.

### Add New...

 <b>Check Box List</b> <i>Multiple answers to question (Choose several)</i>	 <b>Radio Button List</b> <i>Single answer to question (Choose one from few)</i>	 <b>Text Field</b> <i>User generated answer (Fill in the blank)</i>	 <b>Drop Down List</b> <i>Single answer to question (Choose one from many)</i>
 <b>Instructions</b> <i>A descriptive text box with no answer</i>	 <b>Single Check Box</b> <i>Select to affirm (Agree to the above)</i>	 <b>Ranking</b> <i>Prioritize multiple answers</i>	 <b>File Upload</b> <i>Upload a file</i>

## Question Type

- **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.
- **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:** Think of this as 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. Once 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.**

- **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.**

- **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.

## 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 the form name.
- 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 NOT 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 pop-out menu, then click **Manage Forms**.
2. Click **Publish** next to the appropriate form.
3. Use the URL provided in the *Copy URL to Share* box.

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### Publish Form

**Form Status**

Active Inactive

You may use the URL below when inviting others to create submissions for your form. You MUST use the URL below as form URLs copied from your browser address bar will NOT work for other users.

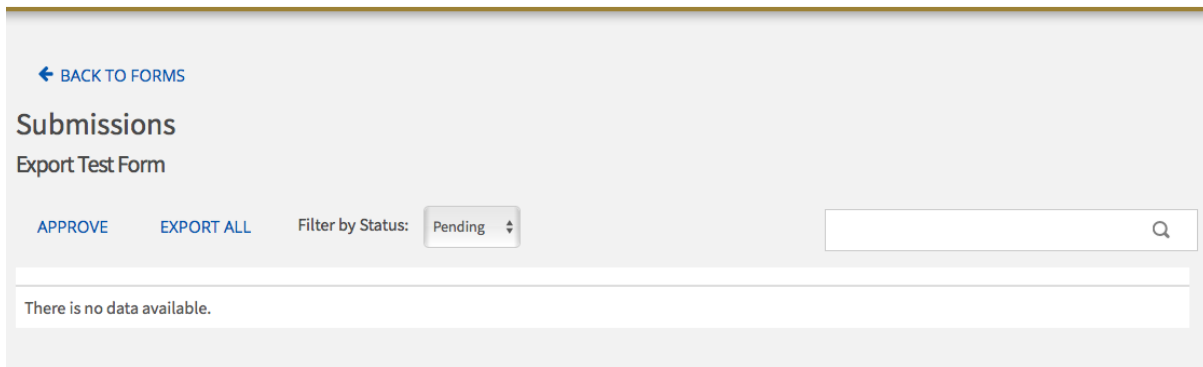
Copy URL to Share

`https://anchorlink.vanderbilt.edu/submitter/form/start/112391`

PUBLISH FORM CANCEL

### How to View Form Results

1. Click **Forms** in the pop-out menu, 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 eye 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 eye next to the form, you have the ability to approve or deny the form and provide a comment.
  - 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 eye 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 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.