Introduction Training Manual

Office of Student Engagement
Missouri State University
901 S. National Ave.
Springfield, MO 65897

http://www.missouristate.edu/studentengagement
(417) 836-4386
Forms

Want to collect demographic information on your members? Need to have your members submit a Non-disclosure Agreement in order to be a member? Collecting data on the number of events your members are attending? The Forms function of CampusLINK has a number of uses.

Create a Form

1. From your organization home page, click the “Forms” tab on the left side navigation.
2. Click the “Create Form” button.
3. Identify the Name of the form, if it should be Active, and the date range you’d like the form to be available during. **The form will only be accessible if Active and during the specified date range.**
4. Identify if the form should accept multiple submissions from the same user.
5. Identify any access restrictions based on positions in your organization that should be in place for this form.
6. Click “Save.”

You are now taken to the Form Creation tool.

1. Click the format on the left side of the page of the question you’d like to add to the form:
   - **Check Box List:** Includes question text and answer set, where multiple answers can be selected.
   - **Radio Button List:** Includes question text and answer set, where only one answer can be selected.
   - **Text Field:** Includes questions text and one text box as the answer, which can be formatted to the desired size.
   - **Drop Down List:** Includes question text and answer set, where only one answer can be selected from the drop-down menu.
   - **Instructions:** Includes question text with no answer set.
- **Single Check Box**: Includes question text with a single check box on the left.
- **Ranking**: Includes question text and answer set with ability to rank up to x number of items.
- **File Upload**: Includes question text with ability to upload a file.

2. Type in text for the question and answer set, if applicable. Click “OK.” **Text fields can be associated with an answer, e.g., Other (Please specify), if needed.**

3. Click on a question for editing options.
   - Click and drag the question to a different sequence with the green arrows.
   - Delete the question entirely by clicking the red “x”.
   - Change the position of the question by Page and Sequence by using the correlating drop down menu options.
   - Click the “Edit” button to make any adjustments to the question as a whole.

4. Once in the Edit box for a particular question, you are able to make any adjustments to the question as a whole.
   - Update a question text under the Properties tab.
   - Designate the minimum and maximum number of answer selections on the Properties tab.
   - Include a Tooltip for an answer choice on the Answers tab. The specific text will display when the user hovers over the answer choice.
   - Include Additional Text to be associated with an answer choice on the Answers tab. The specific text will display in a pop-up window after the user clicks on an “I” icon.
   - Include a Text Area for an answer choice on the Answers tab.
• Add additional answer choices on the Answers tab.
• Reformat the size of the text box, either at the bottom of the properties tab or on the Answers tab by adjusting the number of rows to the desired size.

5. Click “OK” when all edits have been made.

Adding Pages and Conditions to your Form

1. From the Forms page, click “Page List” near the top of the page.
2. Click “Page” from the Add New menu on the left side of the page. A new blank page will appear. Add your questions to this page by following the steps outlined in the Create Form section of this manual.

**Forms can include conditions that specify what should be seen based on previous answer selections.**

1. While accessing your form, go to the page you’d like to apply conditions to by accessing the “Page List” or scrolling through the pages. **Page 1 cannot have conditions applied to them.**
2. Click the Page Properties button in the top right corner.
3. Go to the Conditions Tab.
4. Click “Add Condition” then select the question and answer the page should display based off of.
5. Repeat step 4 to add multiple conditions to display the page.
6. Click “OK” when all conditions have been added to the page.

**Please note that the page will display if the conditions are met.**

Conditions can be grouped together to add greater specificity. To group conditions:

1. From the “Conditions" tab in the “Page Properties”, check the box to the left of each condition that should be grouped together.
2. Click “Group Selected”.
3. Indicate if the group should be True or False.
4. Repeat steps 1-3 for each needed grouping.
5. Click “OK” when all conditions have been grouped.

Publish Form
1. From the Forms tab on your organization's page, locate the form you'd like to publish.
2. Click the “Publish” link to the far right of the form name.
3. Update the Form Status to “Active.”
4. Copy the Form like to provide access to the form via another area from your organization’s form listing.
5. Click “Publish Form”.

**Forms will also be available under the Forms tab in the left navigation for all member of your organization to access during the Active date range.**

**Applying Notifications to your Form**

To include someone other than yourself to receive notification when a submission has been made to the form, you can:
1. From the Forms tab on your organization's page, click the “Manage Forms” link in the left side navigation.
2. Click the name of the form you wish to edit notifications.
3. Click the “Properties” button in the top right corner of the Page List.
4. Select the “Notifications” tab.
5. Click the green plus emblem to add any of the members of the organization to the Notification list. You may also remove anyone from the Notifications list by selecting the red “x” next to their name.

**Review Form Submissions**

1. From the Form tab on your organization's page, click the “Manage Forms” link in the left side navigation.
2. Locate the form you’d like to review submissions for.
3. Click the “Submission” link to the far right of the form name.
4. Click on “View” to the far right of each