

Introduce yourself in the chat!  
What is your institution and  
where in the world are you?

*I'm in Philly, but originally from  
Birmingham, AL!*

# Form Settings & Repeatable Fields

Modern Campus Involve

# Form Settings & Repeatable Fields

Modern Campus Involve

# Agenda

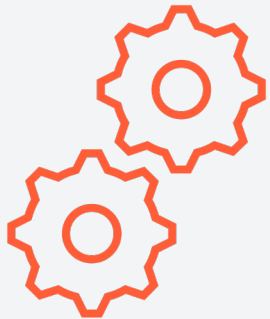
1. Welcome
2. Forms FAQs
3. Settings FAQs
4. Field Highlight:  
Repeatable Fields
5. Q&A
6. Close



# Forms FAQs

# What are forms?

Powerful  
Tools



Digitize Campus  
Processes



Extremely  
Customizable



# Can I customize the Event/Organization forms?

• **Absolutely!**

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### Organization Registration

Register your campus group.

---

#### Transition

Did you update your officers? \*

This is very important!

Reflect on the year. How were you able to work toward your goals?

---

Leaders need to complete the safety training each year.  
Register here! [www.cu.com/campussafetytraining](http://www.cu.com/campussafetytraining)

### Event Registration

Register an event hosted by your organization.

---

#### Alcohol

Will you serve alcohol? \*

---

Kind of alcohol

---

#### Liquor Policy Acknowledgment

Cricket University allows mixed drinks with events of 150 guests or less. Please sign below to acknowledge and agree to follow this policy.

---

#### Policy Acknowledgement

University Life will arrange bartenders and security guards for your event. Your organization may be responsible for covering the cost of the bartenders and the security guards. Please initial below. Please note that some on-campus spaces may require groups to hire bartending and/or security staff through their team, not University Life. In those cases, your group will be responsible for covering associated costs.

---

# Organization forms?

## Organization Registration

Register your campus group.

### Transition

Did you update your officers? \*

YES NO

This is very important!

Reflect on the year. How were you able to work toward your goals?

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CLICK TO SIGN



# Can I customize the Event Registration Forms?

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---



What are some of the most  
helpful or most used forms on  
your campus?

Feel free to share / elaborate in the chat!

# What types of forms do campuses make?

- Yearbook cover art contest
- SGA elections
- Travel arrangements
- Catering requests
- Applications
- Alcohol policies

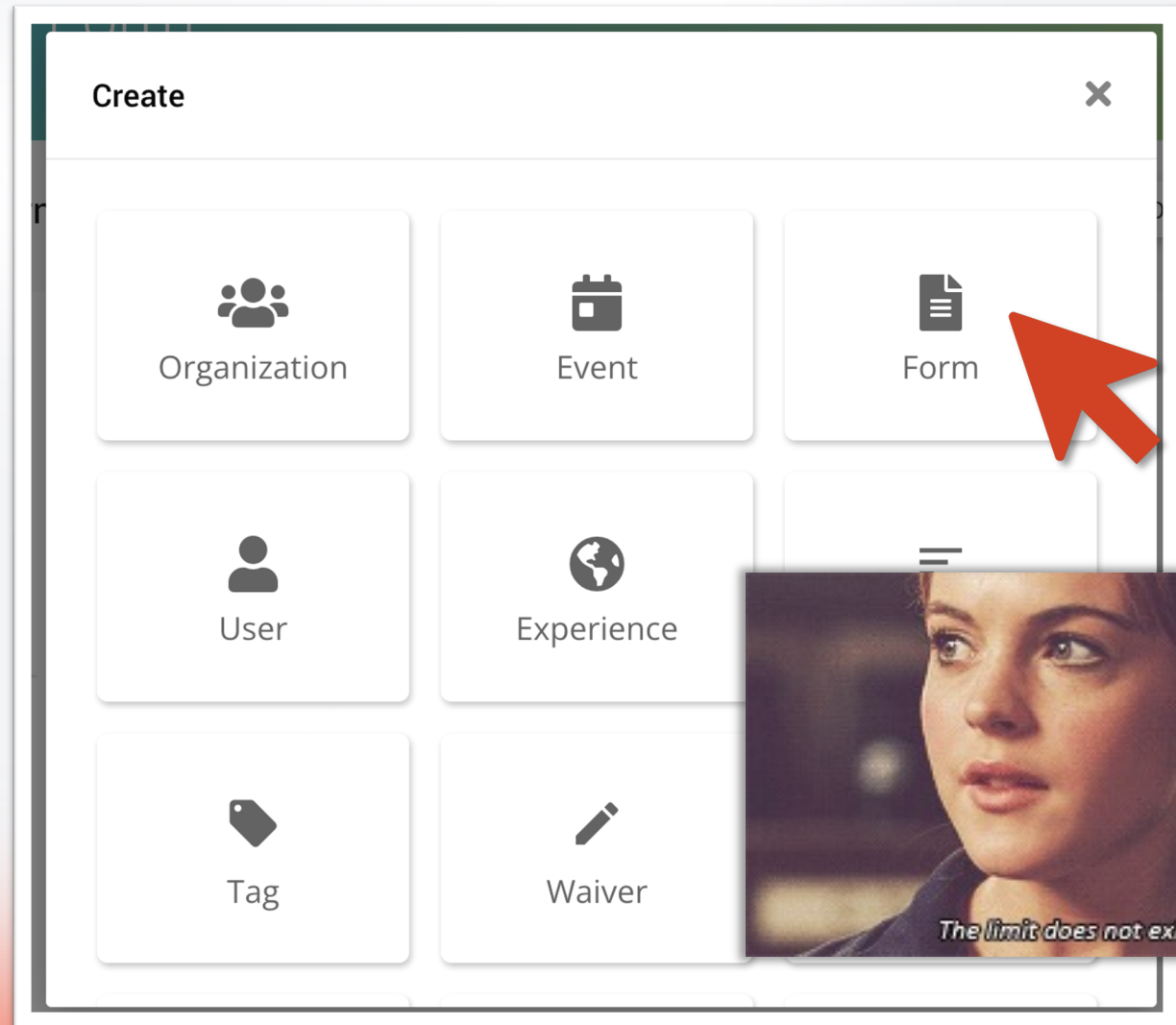
10

Title	Description
2023 Student Leader Excellence Award Nomination	
Apply For Opportunity	Fill out to apply for a skill, experience, points, or service hours.
Event Feedback Form	
Event Registration	Register an event hosted by your organization.
Nomination Form	
Organization Registration	Register your campus group.
Reflection Form	
Reservation Request Form	Want to reserve somewhere on campus? Fill this out!

# How many forms can I make?

- Unlimited!
- You cannot delete
- You can deactivate / hide.

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# Who can make forms?

-  Campus Administrators
-  Organization Administrators
-  Category Administrators
-  Campus View

# Settings FAQs

# Can everyone see the forms I make?

- No!
- Not even campus administrators!
- You must give **ACCESS**

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← Access

Control who can access and edit this form and its responses.

Who ▾

**Edit**

Allows users to edit the form fields, settings, and view responses.

Morrie Helstrip can View ▾ ✓ ✕

**Edit & Share**

Allows users to edit the form fields, settings, view responses, and give access to others.

Campus Administrator of Training Kelsey can Edit & Share ▾ ✕

# But will we lose access to a form?

- **Pass it along**
  - Leaving your position?
  - Graduating?
  - Pass along access to someone else so the form isn't lost!

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< Access

Control who can access and edit this form and its responses.

Who ▲

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# Can I make a form private?

Views	Status
35	
<ul style="list-style-type: none"><li>Edit</li><li>Duplicate Form</li><li>View Responses</li><li>View Response Summary</li><li>Respond From Portal</li><li><b>Deactivate</b></li></ul>	
50	

Details >

Form Name  
**2023 Student Leader Excellence Award Nomination**

Form Description

Category  
Student Organizations x

Status

- Active
- Active**
- Draft

Visibility >

Login

- Require Login
- Anonymous

Location

- Respond From Admin
- Attached to Organization
- Attached to Event
- Campus Wide

# Form Settings: Details

# Details

- Name – don't forget this one!
- Description

Form Builder

FIELDS FORM SETTINGS

Details >

Form Name  
Event Registration

Form Description

Category

Status  
Active

Allows Revisions

Lock Revisions After Approval

# Details

- Name – don't forget this one!
- Description

modern campus

< Form Builder

Cricket University

## Forms

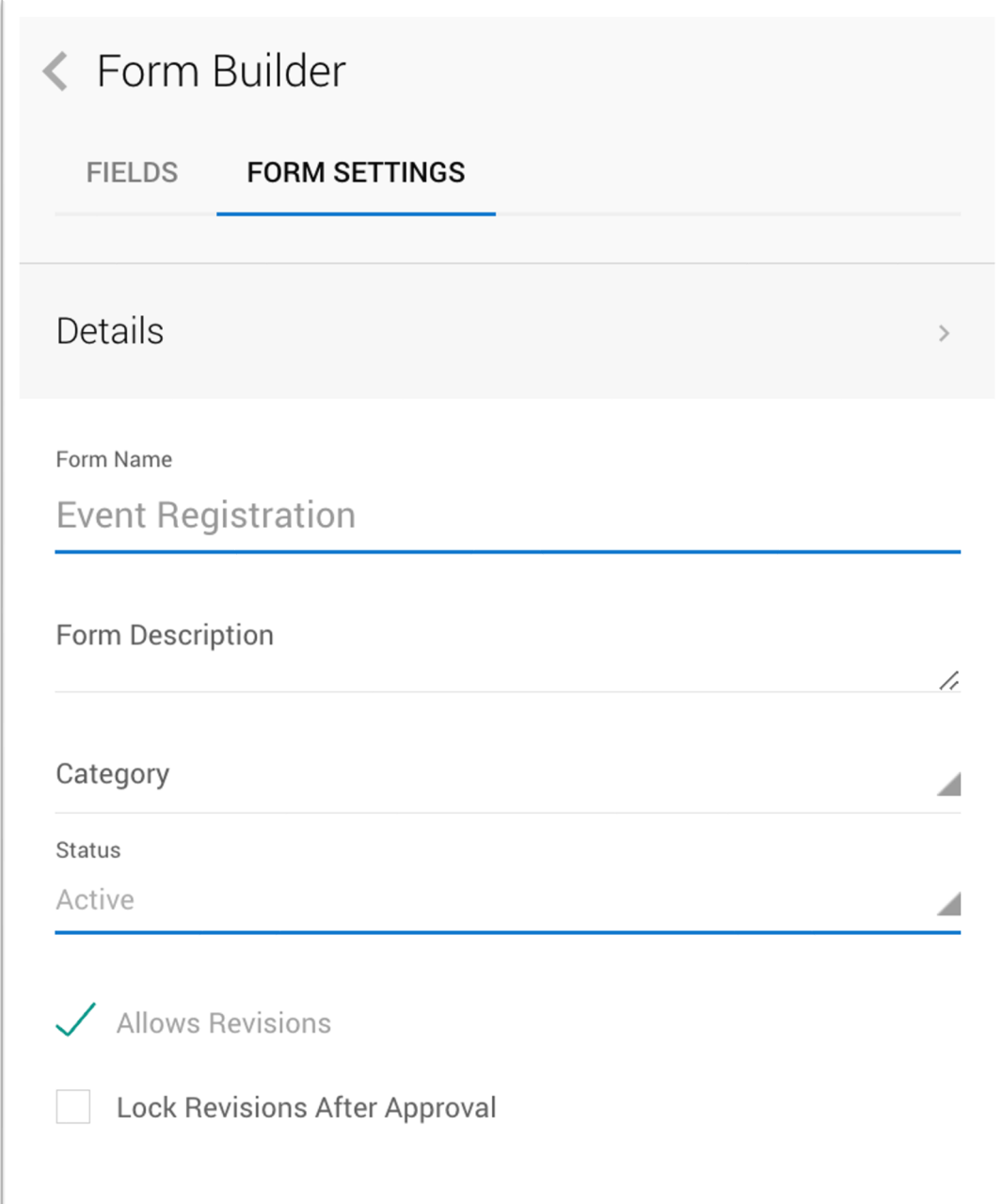
Search Forms CATEGORY ▾

Title	Description
<a href="#">2025 Student Leader Excellence Award Nomination</a>	Nominate for the 2025 award. Deadline for nomination is April 10th!
<a href="#">Apply For Opportunity</a>	Fill out to apply for a skill, experience, points, or service hours.

Lock Revisions After Approval

# Details

- Name – don't forget this one!
- Description
- Status
  - Active to use
  - Draft to pause
- Allow revisions
  - Student can revise
  - Admin can revise



Form Builder

FIELDS FORM SETTINGS

Details >

Form Name  
Event Registration

Form Description

Category

Status  
Active

Allows Revisions

Lock Revisions After Approval

# Form Settings: Responses

# Response

- Response Title
  - Administrative
  - What do you want to see when you see this?
- Hide Empty Fields
  - Use it or lose it!
  - Great for content
- Success Action – when I press “Submit”

The screenshot displays the 'Responses' section of a Modern Campus interface. At the top, there is a 'Responses' header with a right-pointing arrow. Below this, there are two buttons: 'SUMMARY' and 'EXPORT ALL'. A search bar labeled 'Search Responses' is present. Below the search bar are three filter buttons: a blue checkmark button, a green 'STATUS' button with a dropdown arrow, and a purple 'DATES' button with a dropdown arrow. The main content is a table with the following columns: 'Response Title', 'Status', and 'Completion Time'. The table lists six responses, all with a status of 'Submitted'. The response titles are Sophie Johnson, Sophie Johnson, Maya Rae, Sophie Johnson, and Maya Rae. The completion times range from 03/12/2024 - 1:44 PM to 03/12/2024 - 2:21 PM. Each row has a vertical ellipsis menu icon on the right. At the bottom of the interface, a white notification box states: 'Your nomination response has been sent successfully!'.

Response Title	Status	Completion Time
Sophie Johnson	Submitted	03/12/2024 - 2:21 PM
Sophie Johnson	Submitted	03/12/2024 - 2:20 PM
Maya Rae	Submitted	03/12/2024 - 2:17 PM
Sophie Johnson	Submitted	03/12/2024 - 2:17 PM
Maya Rae	Submitted	03/12/2024 - 1:44 PM



# Responses

- Response Title
  - Administrative
  - What do you want the title to be when you see this in your dashboard?
- Hide Empty Fields
  - Use it or lose it!
  - Great for content building fields
- Success Action – what happens when I press “Submit?”

Responses

Response Title  
Your Name

Settings

✓ Hide Empty Fields

Success Action  
Success Message  
The action that will occur once a response is sent.

Success Message  
This message will appear once a responder submits a response

H1 H2 H3 H4 H5 H6 P PRE ”

B I U ~~ABC~~ ☰ ☷ ↺ ↻ ⌛

☰ ☷ ☸ ☹ ☺ ☻

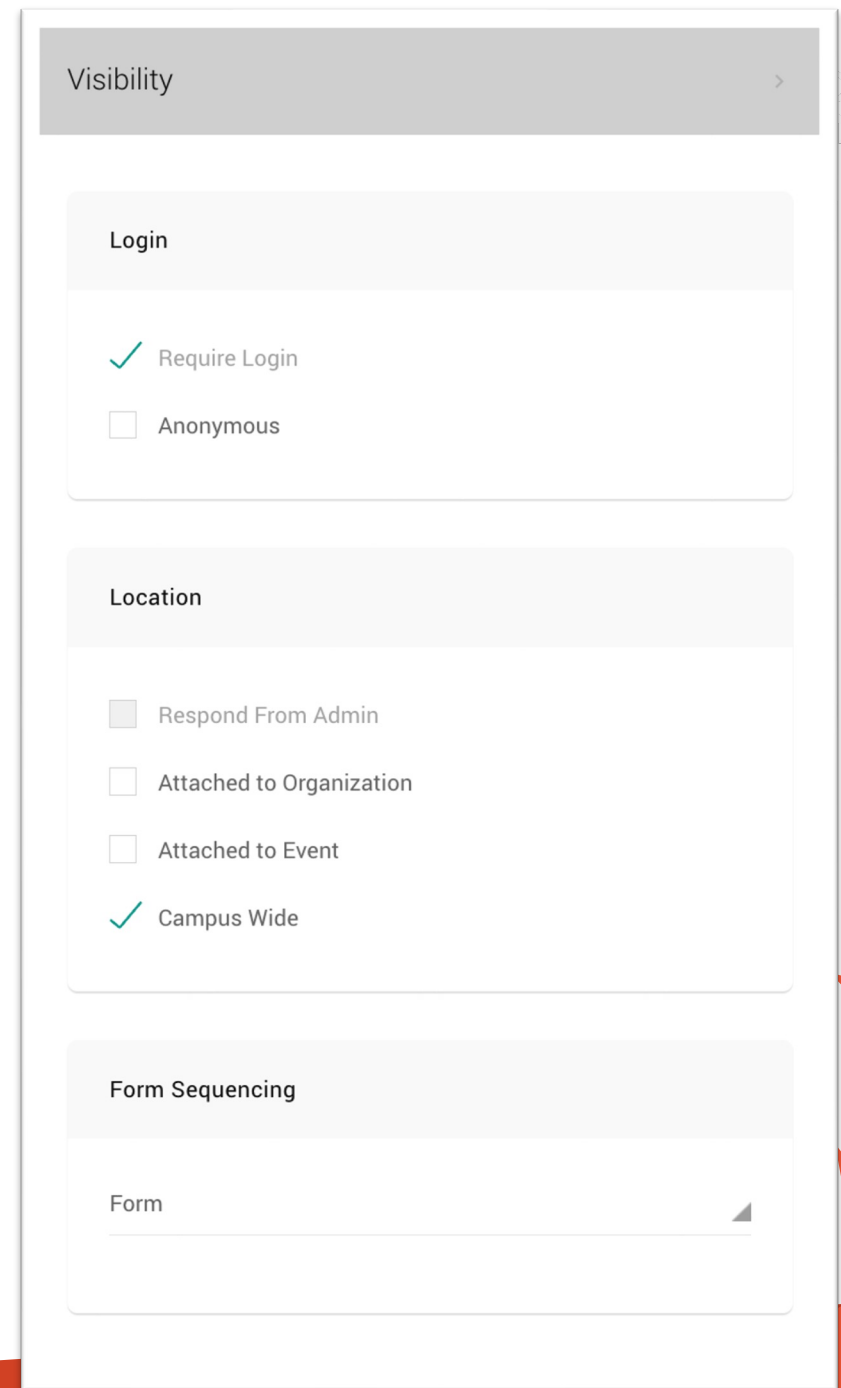
</> 📧 🔗 ▶ WORDS: 7 CHARACTERS: 52

Your nomination response has been sent successfully!

# Form Settings: Visibility

# Visibility

- **Require Login**
  - Do you want to ensure **ONLY** folks from your institution fill it out?
- **Anonymous**
  - No names
  - You can still require login and limit responses!
- **Location**
  - **Where** do you want this form to show up on your student portal?



The screenshot shows a 'Visibility' settings panel with three sections: 'Login', 'Location', and 'Form Sequencing'. The 'Login' section has 'Require Login' checked and 'Anonymous' unchecked. The 'Location' section has 'Respond From Admin', 'Attached to Organization', and 'Attached to Event' unchecked, and 'Campus Wide' checked. The 'Form Sequencing' section has a dropdown menu labeled 'Form'.

Visibility >

Login

- Require Login
- Anonymous

Location

- Respond From Admin
- Attached to Organization
- Attached to Event
- Campus Wide

Form Sequencing

Form ▾

# Form Settings: Availability

# Availability

- **Per User**
  - Kelsey can only fill this form out once
- **Per Form**
  - Only 25 people can register for this event
- **Date / Time**
  - Leave blank for continuous use

## Availability >

### Limit Responses

Per User

---

Per Form

---

### Date/Time

Available Starting

04/06/2023 - 10:33 AM ×

---

Available Until

---

# Form Settings: Access

# Access

< Access  
Control who can access and edit this form and its responses.

Who  
Role Roles

Owner  
The best access known to anyone.

Kelsey Seale is the Owner

- Campus Administrator
- Campus View
- Category Administrator
- Organization Administrator

< Access  
Control who can access and edit this form and its responses.

Who  
Role Roles

Owner  
The best access known to anyone.

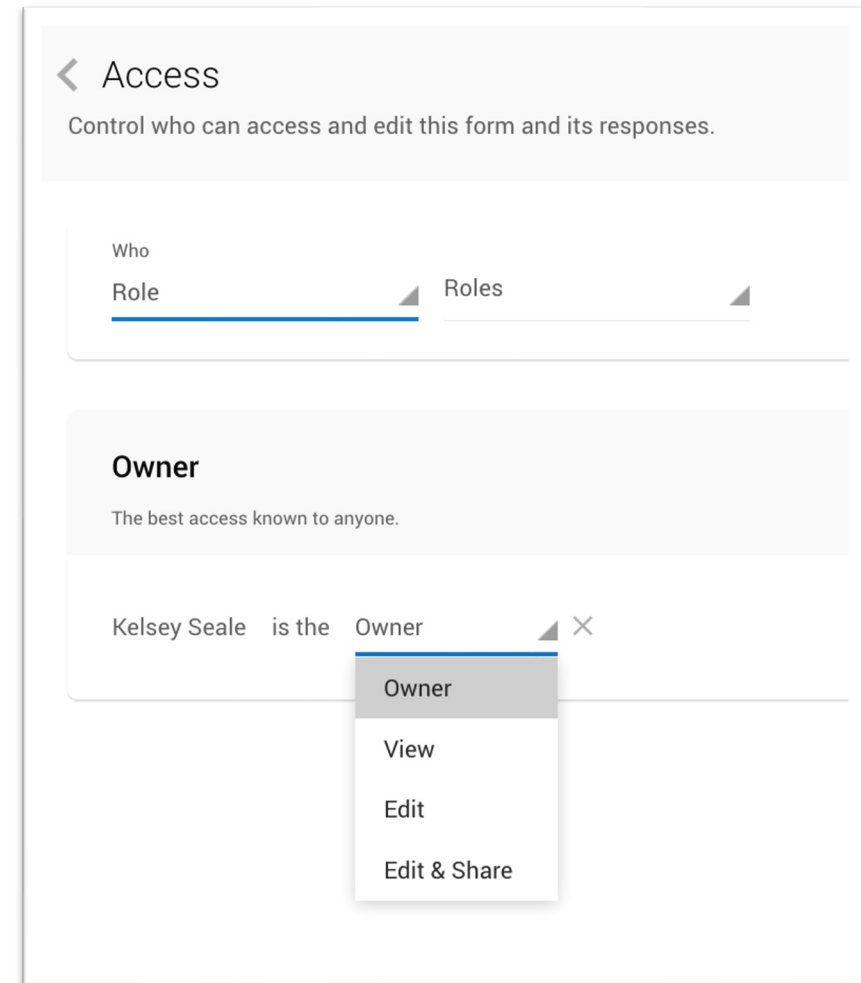
Kelsey Seale is the Owner

- Owner
- View
- Edit
- Edit & Share



# Access: Types

- **Owner:** Full control
- **View:** View form and response, no edits
- **Edit:** Modify form structure and settings
- **Edit+Share:** Modify and share to allow for collaboration



# Form Settings: Approval + Notifications

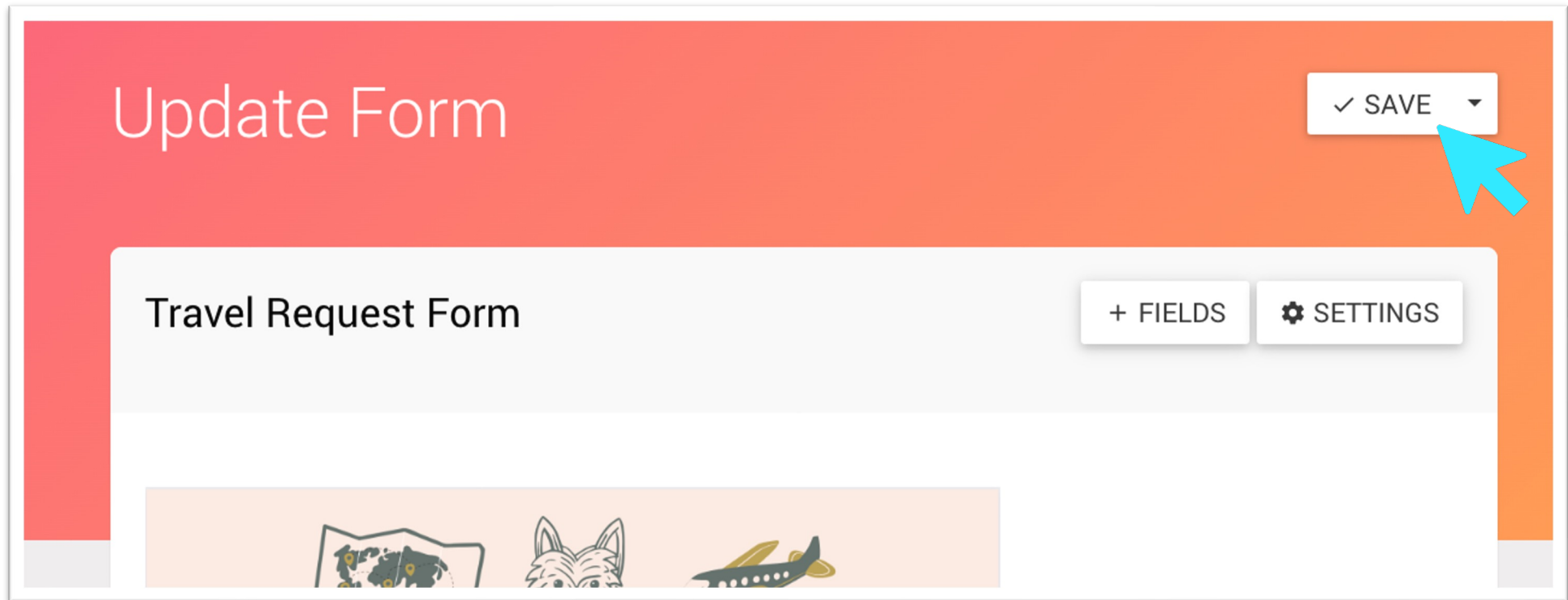
# Approvals + Notifications

- Make sure everyone is in the know
  - Approve – need to check and pass along
  - Notify – just get an email
- Ordered
  - Sends one at a time until a “deny”
- Unordered
  - All notifications go out at once

The screenshot displays the 'Approvals' configuration page. At the top, there is a back arrow, the title 'Approvals', a dropdown menu set to 'ORDERED', and an 'ADD STAGE' button. Below this, two stages are listed vertically, connected by a vertical line with person icons. Each stage is a box containing a 'What' field (User), a 'Users' field (Bucknall, F and Caton, Sofi), and an 'Action' field (Approve and Notify). To the right of each action field are 'LOGIC' and 'MESSAGE' buttons.

What	Users	Action
User	Bucknall, F	Approve
User	Caton, Sofi	Notify

# SAVE SAVE SAVE!!!!



# Settings Quiz!

# Repeatable Fields

Field Setting Highlight!

# Repeatable Field

- Creates a “clean form”
- Clickable “Add” button creates a copy
- User can customize to their own needs

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The screenshot displays a web browser window with the URL `trainingkeissey.presence.io/form/nomination-form`. The page header for 'Cricket University' includes navigation links for 'Organizations', 'Events', 'Forms', and 'Opportunities', along with a user profile icon. The main content area is titled 'Nomination Form' and features a green 'SUBMIT' button. A section titled 'Nominee Info' contains a form with two input fields: 'Name' (filled with 'Mason Dixon') and 'Year' (filled with 'Freshman'). A small 'ADD' button is positioned to the right of the 'Nominee Info' section, and a mouse cursor is hovering over it, indicating the action of adding a new entry to the list.



# Repeatable Field

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The screenshot shows a web browser window displaying a 'Nomination Form' on the Cricket University website. The browser's address bar shows the URL 'trainingkelsey.presence.io/form/nomination-form'. The page header includes the Cricket University logo and navigation links for 'Organizations', 'Events', 'Forms', and 'Opportunities'. A user profile icon is visible in the top right. The form itself has a title 'Nomination Form' and a green 'SUBMIT' button. Below the title is a repeatable field titled 'Nominee Info' with an 'ADD' button. The field contains two entries: 'Name' with the value 'Mason Dixon' and 'Year' with the value 'Freshman'. A mouse cursor is positioned over the 'ADD' button.

# Repeatable Field Set Up

1. Add a **Field Group** to your form.
2. Click pencil to find the **Field Group Settings**
3. Select "Enable Repeatable Fields. You **MUST** enable repeatable fields **BEFORE** adding anything to the field group.
4. Add any fields to your repeatable field group.

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The screenshot shows the 'Field Settings' interface for a field named 'Student Leader Awards'. The 'Field Name' is 'Student Leader Awards' and the 'Field Description' is empty. The 'Field Size' is set to 'MEDIUM'. The 'Field Group Settings' section is expanded, and the 'Enable Repeatable Fields' option is checked with a green checkmark. The 'Conditionals' section is also visible at the bottom.

< Field Settings

Details >

Field Name  
Student Leader Awards

Field Description

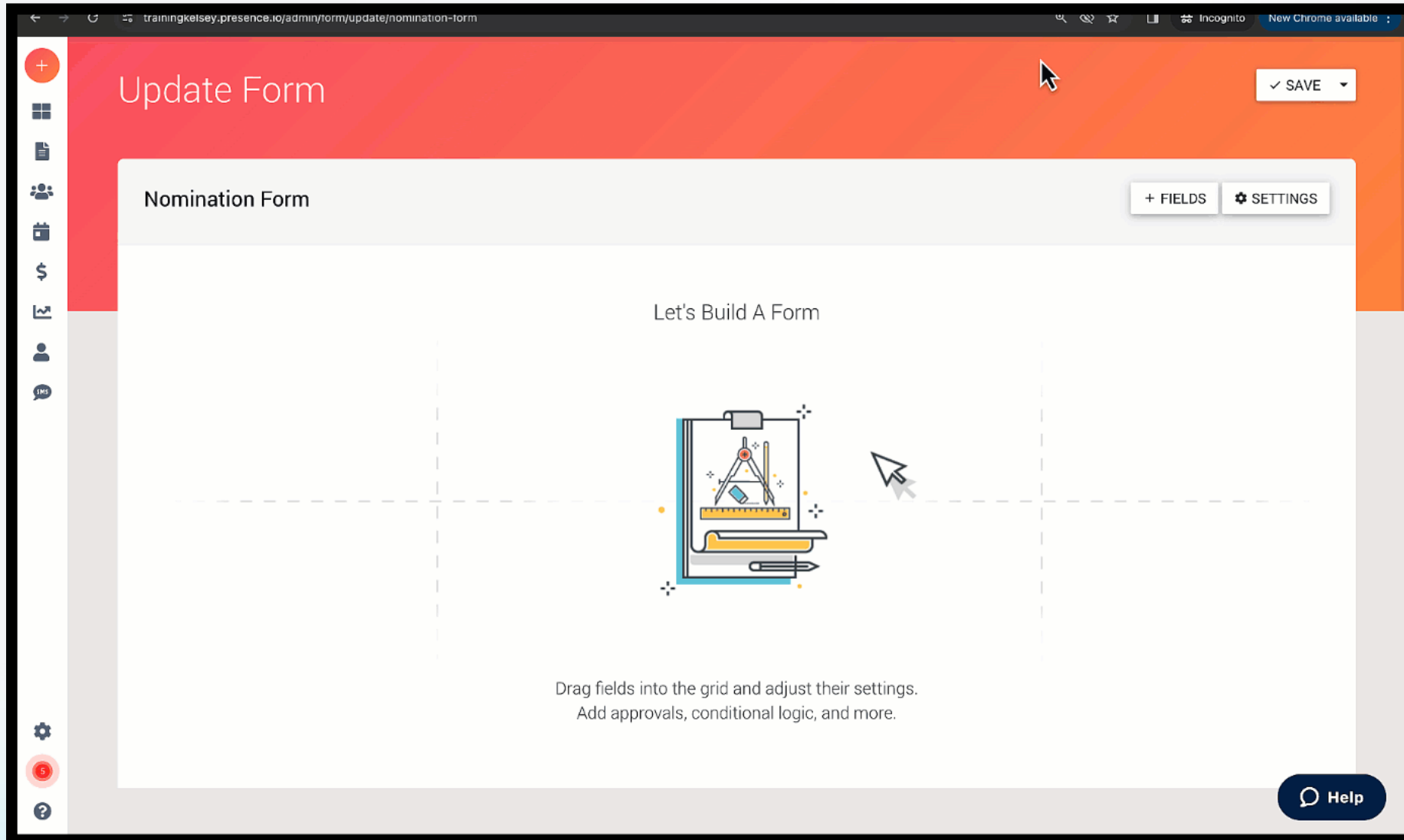
Field Size  
X-SMALL SMALL **MEDIUM** LARGE

Field Group Settings >

✓ Enable Repeatable Fields

Conditionals >

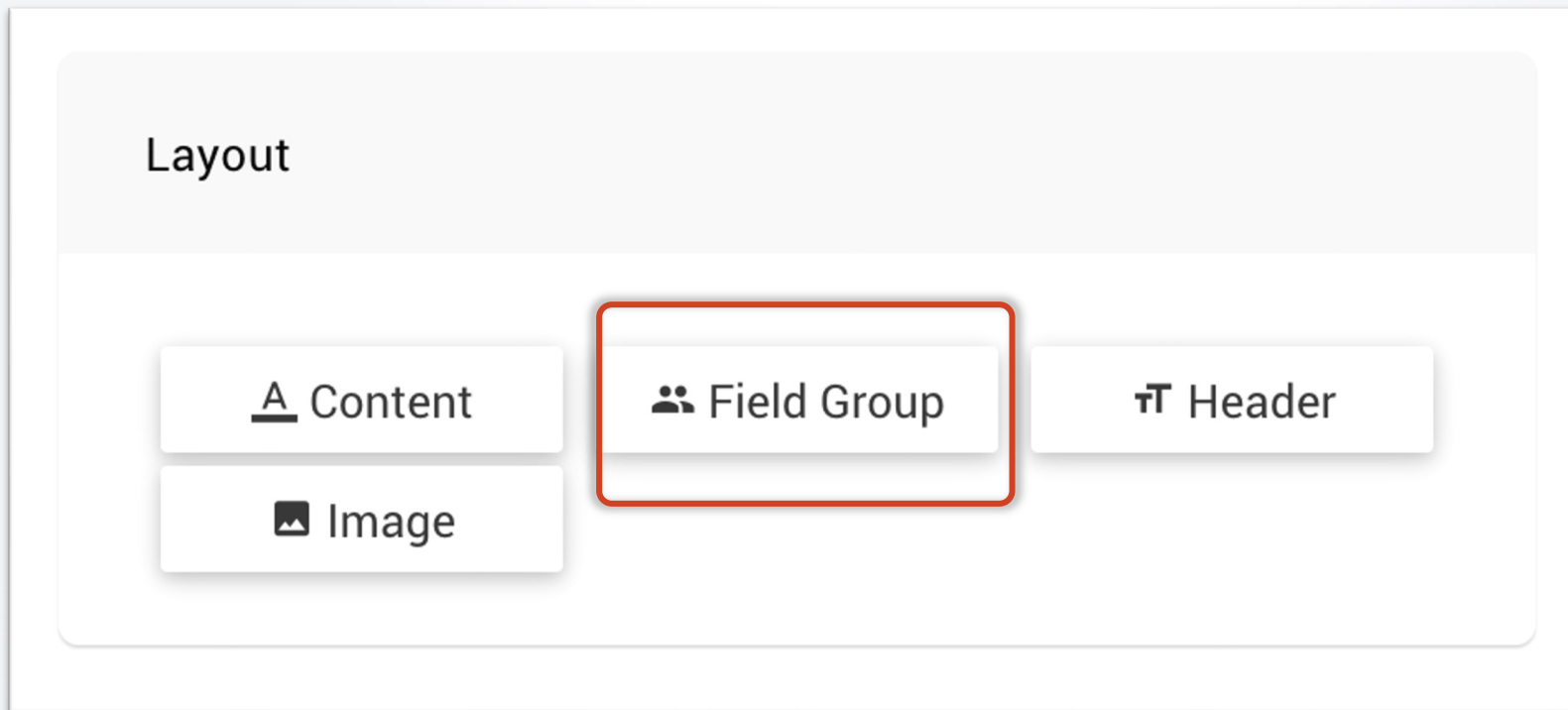
# Repeatable Field Set Up



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# Repeatable Fields Tip

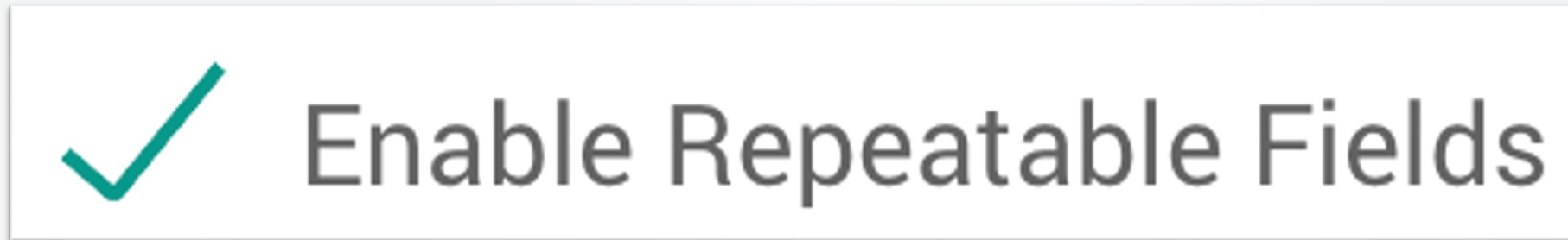
1. Must be used on a **FIELD GROUP**



# Repeatable Fields Tip

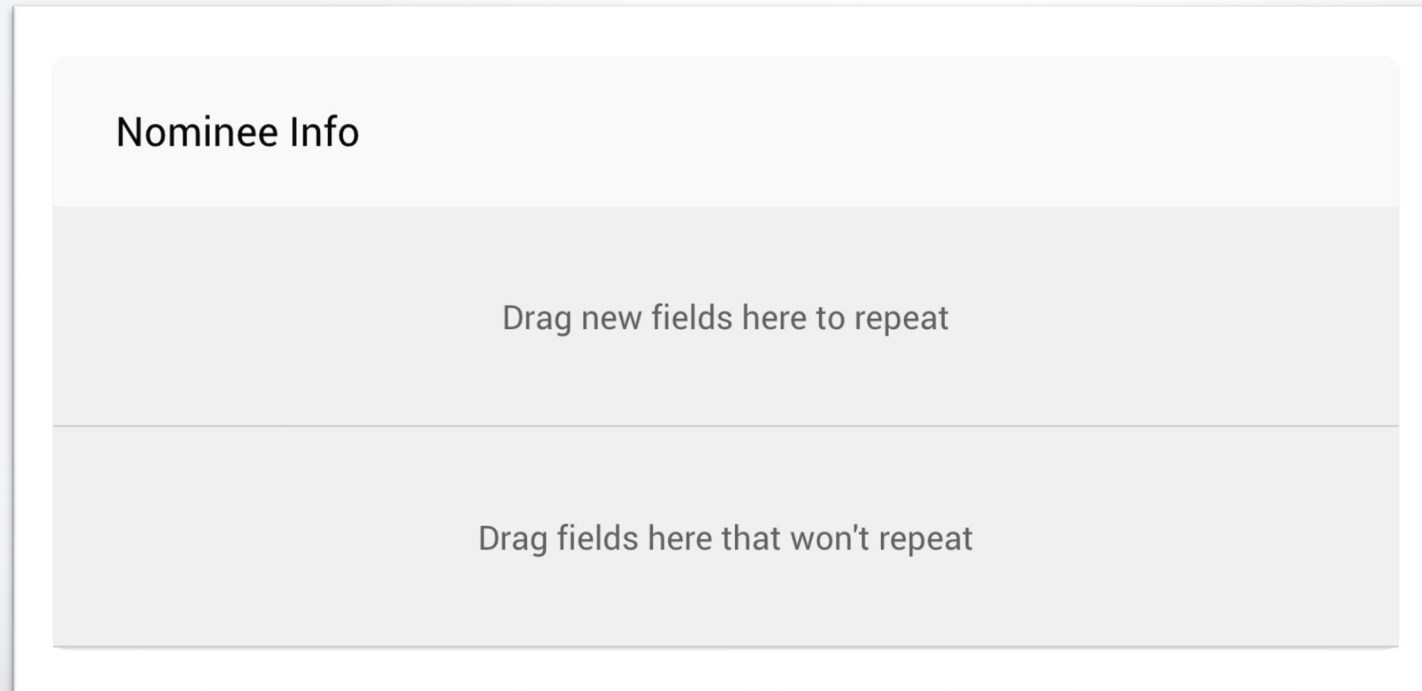
2. You **MUST** turn on repeatable fields for your field group **BEFORE** adding new fields to the section.

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# Repeatable Fields Tip

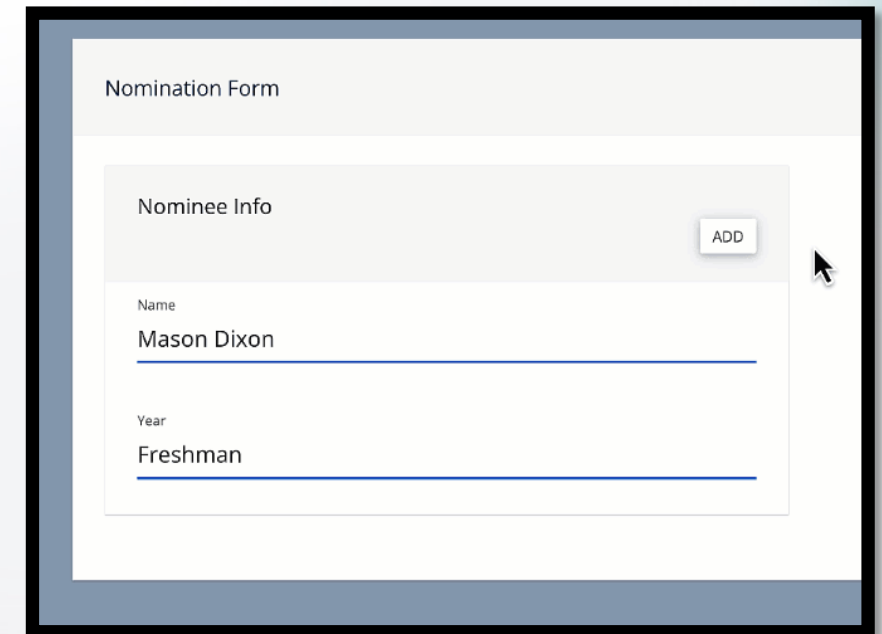
3. When you enable repeatable fields, the field divides into two sections. Fields added ABOVE the line will repeat. Fields added BELOW the line will not repeat.



# When to use Repeatable Fields

1. Nominate multiple people for the same award.
2. Upload multiple documents.
3. Upload multiple receipts.
4. Apply for multiple roles on the same form.
5. Add multiple date/times you are available.

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The screenshot displays a web form titled "Nomination Form". It features a section labeled "Nominee Info" with a light gray background. To the right of this section is a small "ADD" button. Below the section, there are two input fields: "Name" with the value "Mason Dixon" and "Year" with the value "Freshman". Both fields have blue horizontal lines underneath them, indicating they are part of a repeatable list.

Let's add repeatable fields  
to our form!



What can you put into  
practice TODAY?

# Q&A

Please put your questions in the Q&A box.  
I'll get to as many as possible and follow up via  
email if more research is needed!

# Thank You

See you next month!