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

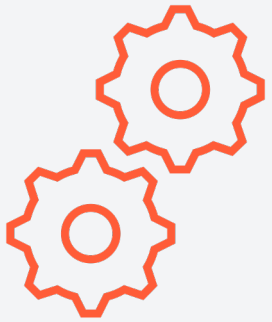
Agenda

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

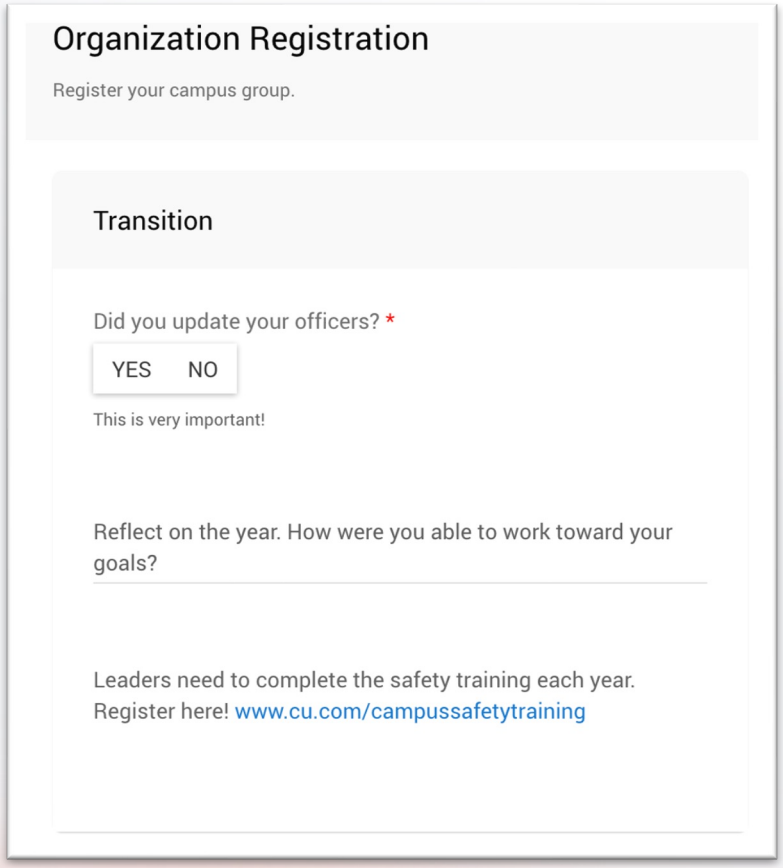


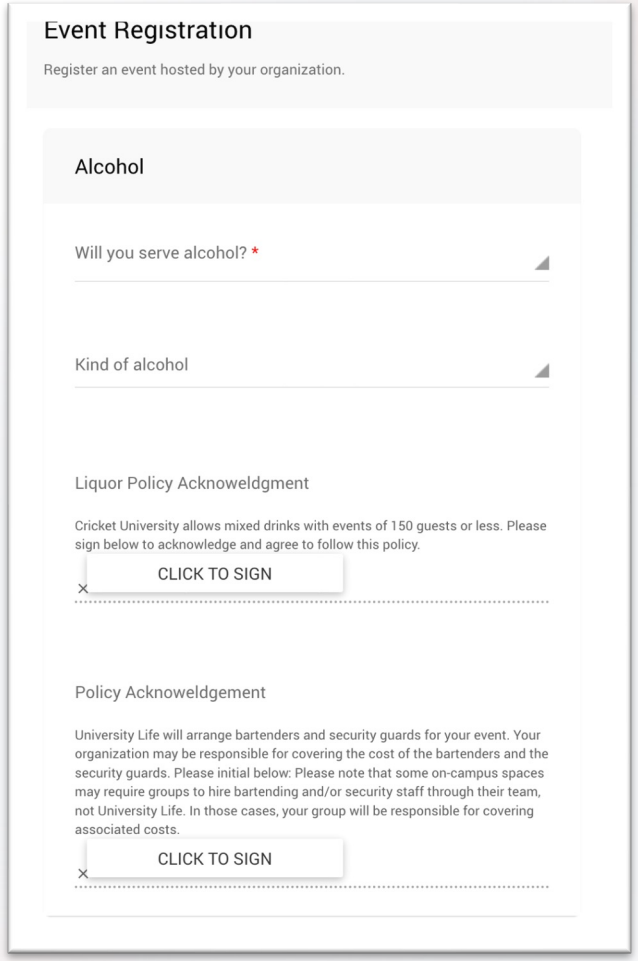
Digitize Campus Processes

Extremely Customizable

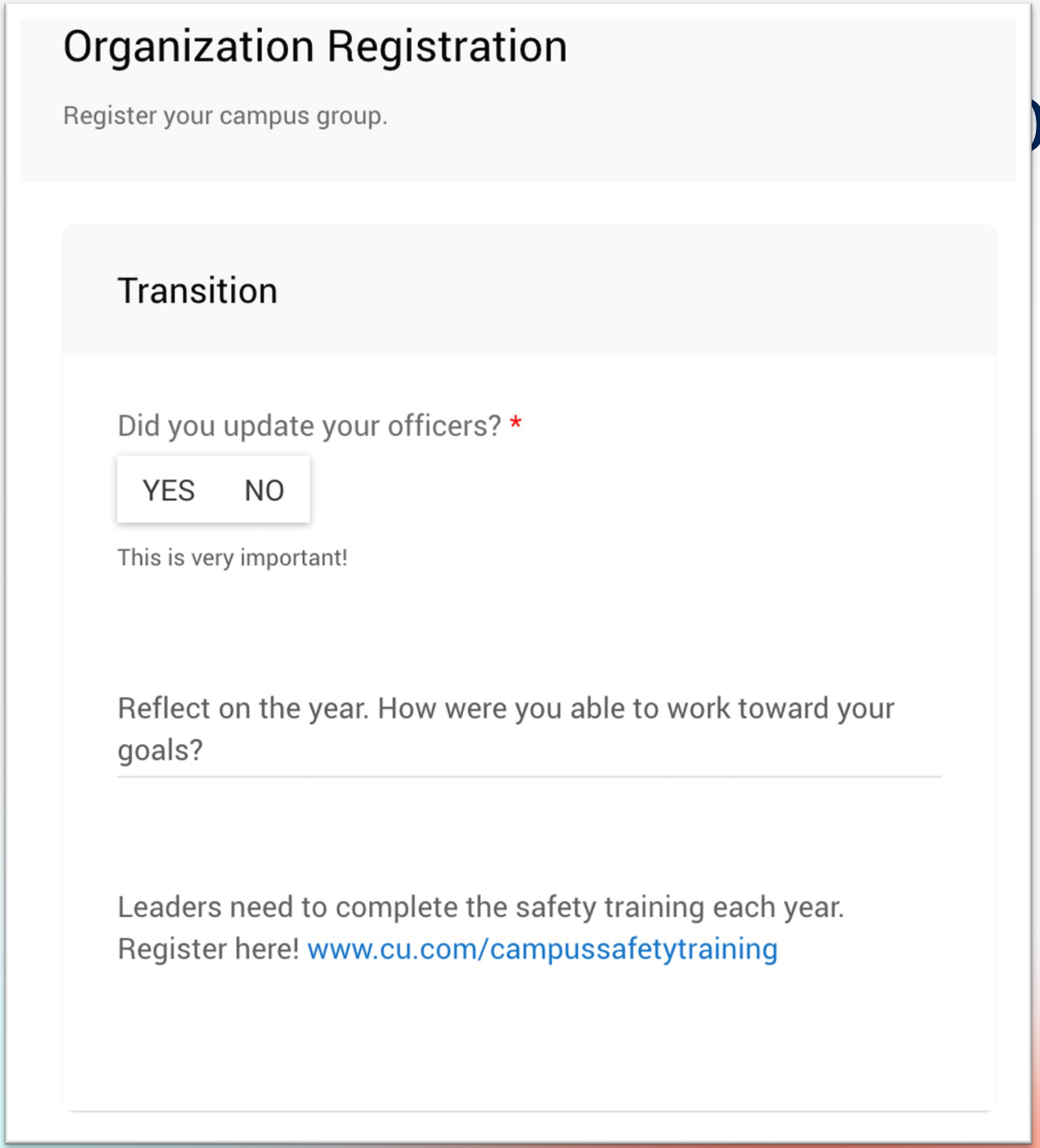
Can I customize the Event/Organization forms?

- Absolutely!





rganization forms?


Organization Registration

Register your campus group.

Transition

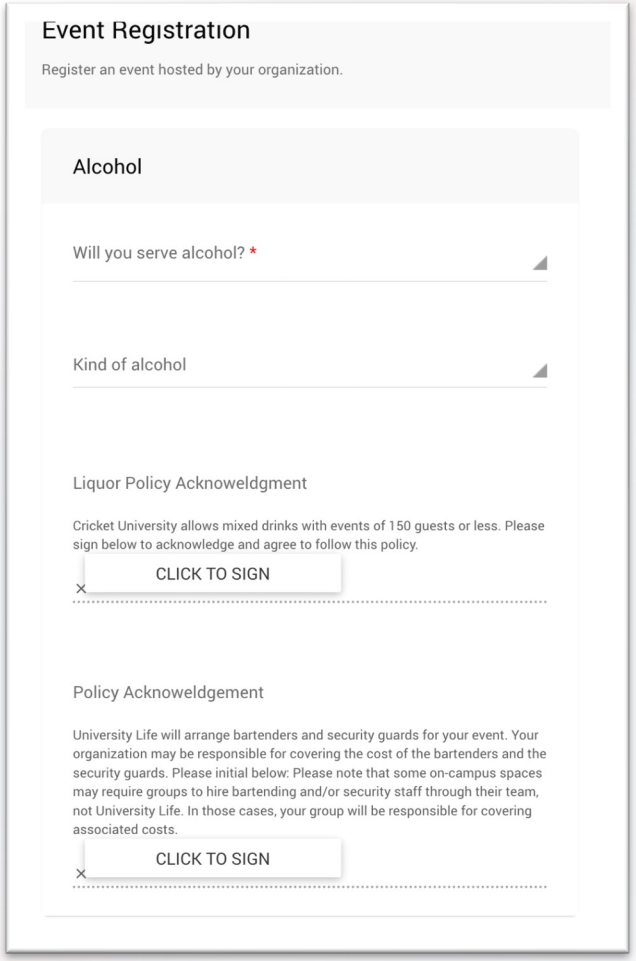
Did you update your officers? *

YES NO

This is very important!

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

Leaders need to complete the safety training each year. Register here! 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.

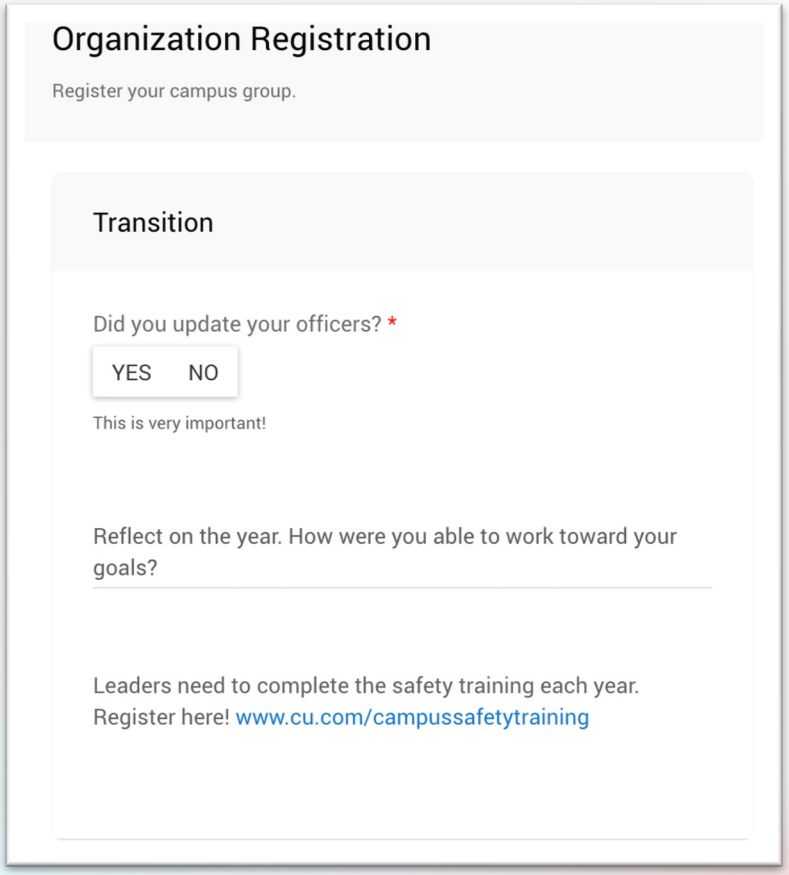
CLICK TO SIGN

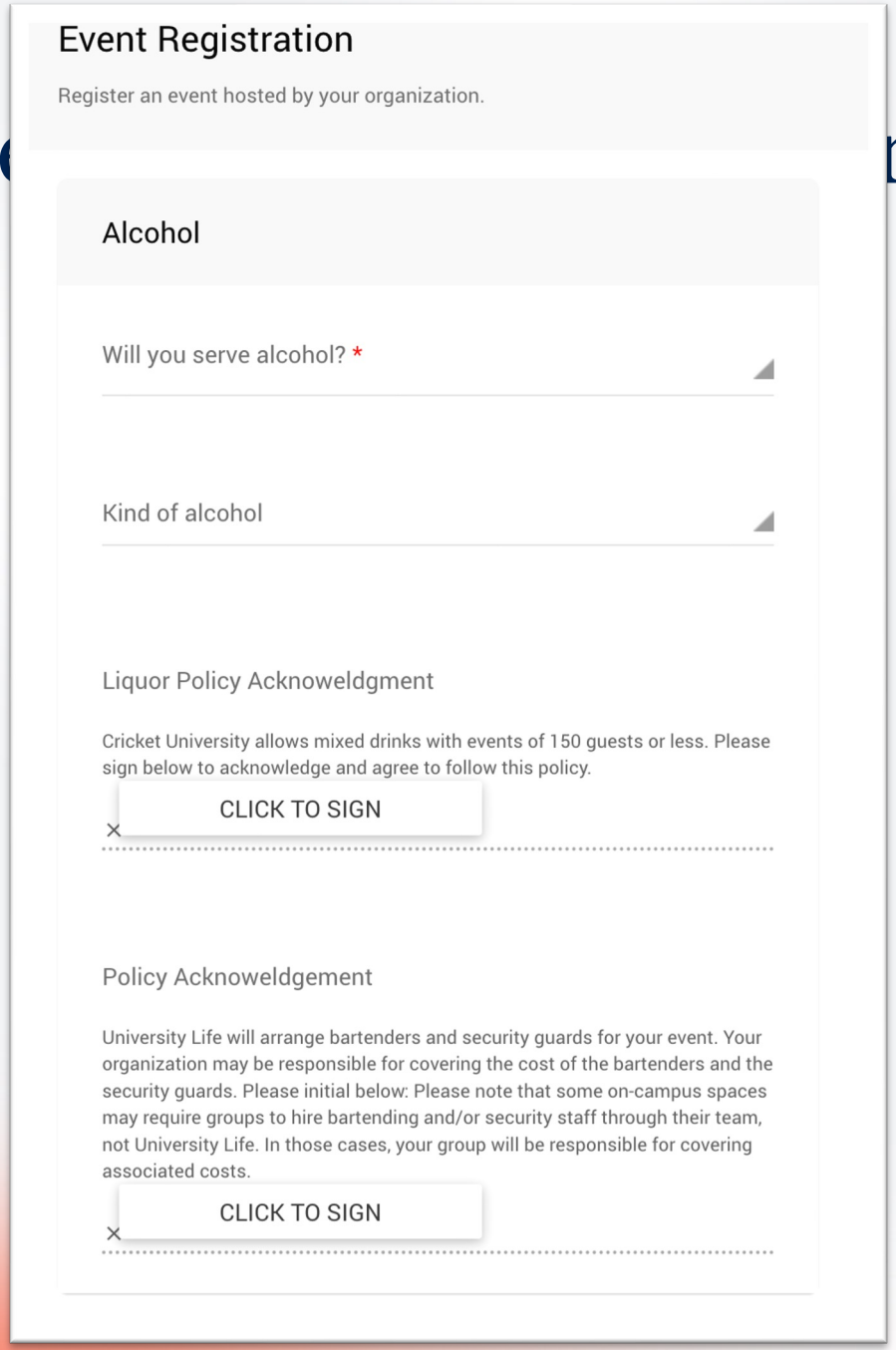
Policy Acknowledgement

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.

CLICK TO SIGN

Can I customize the Eve ms?



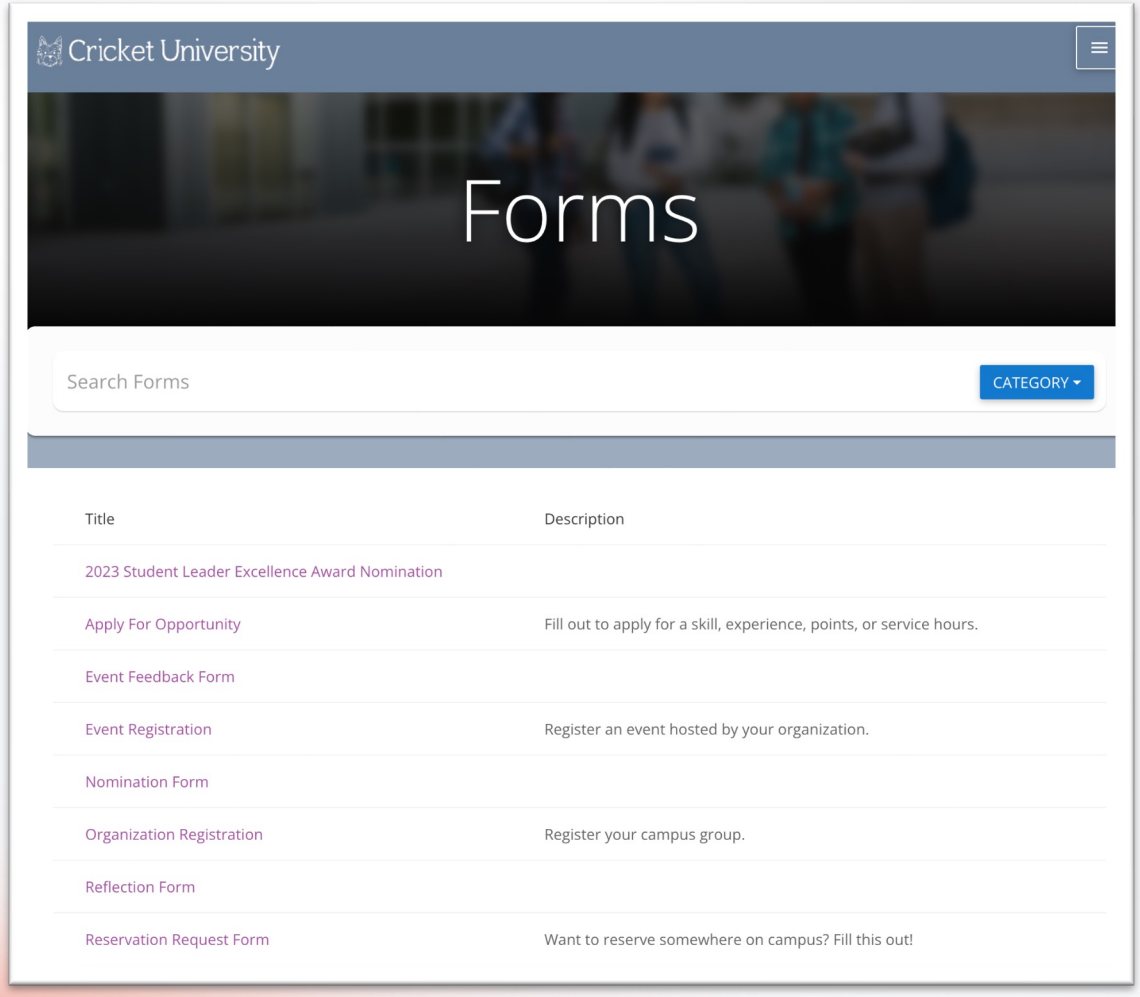


What are some of the most helpful or most used forms on your campus?

Feel free to share / elaborate in the chat!

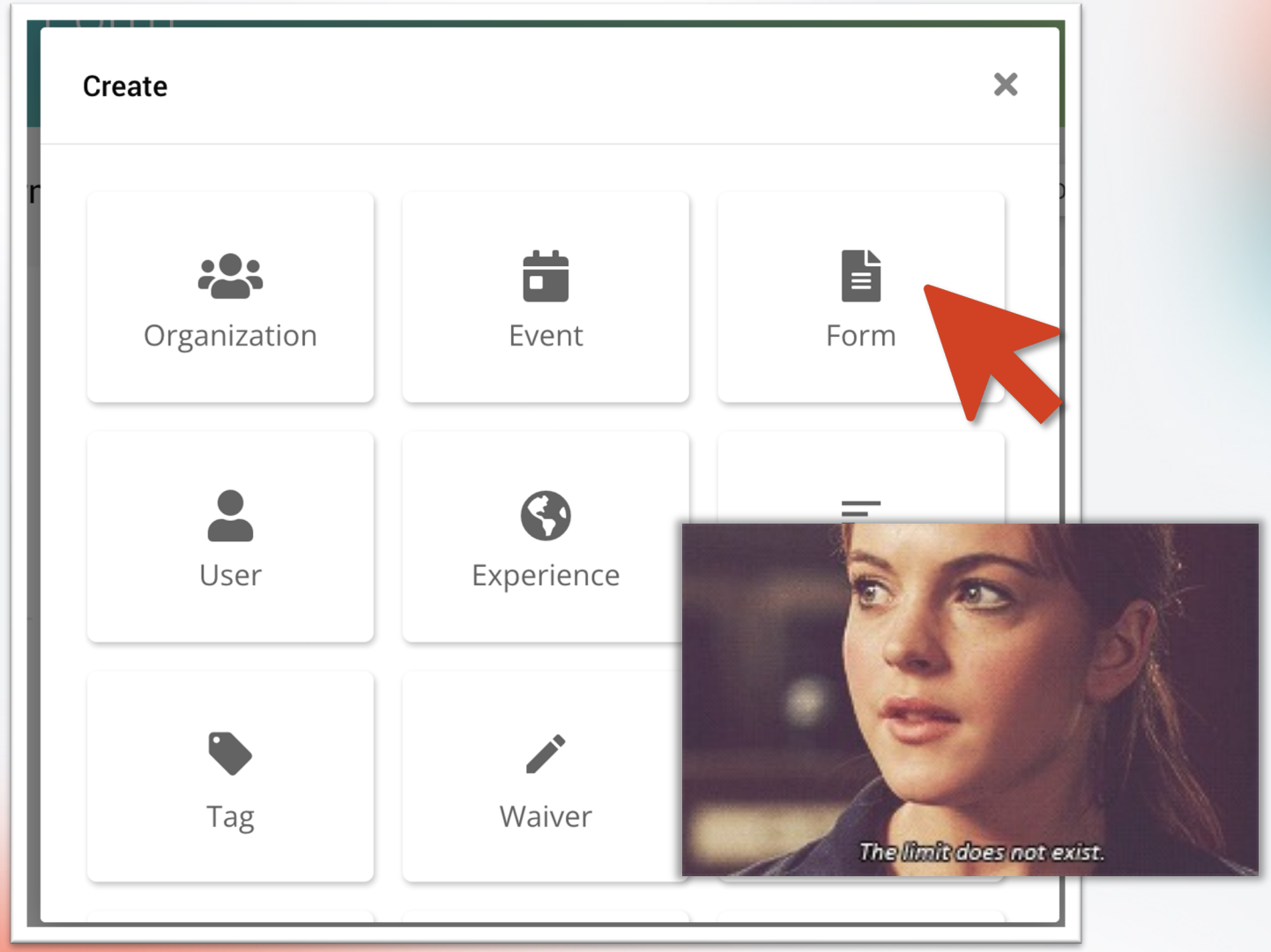
What types of forms do campuses make?

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



How many forms can I make?

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



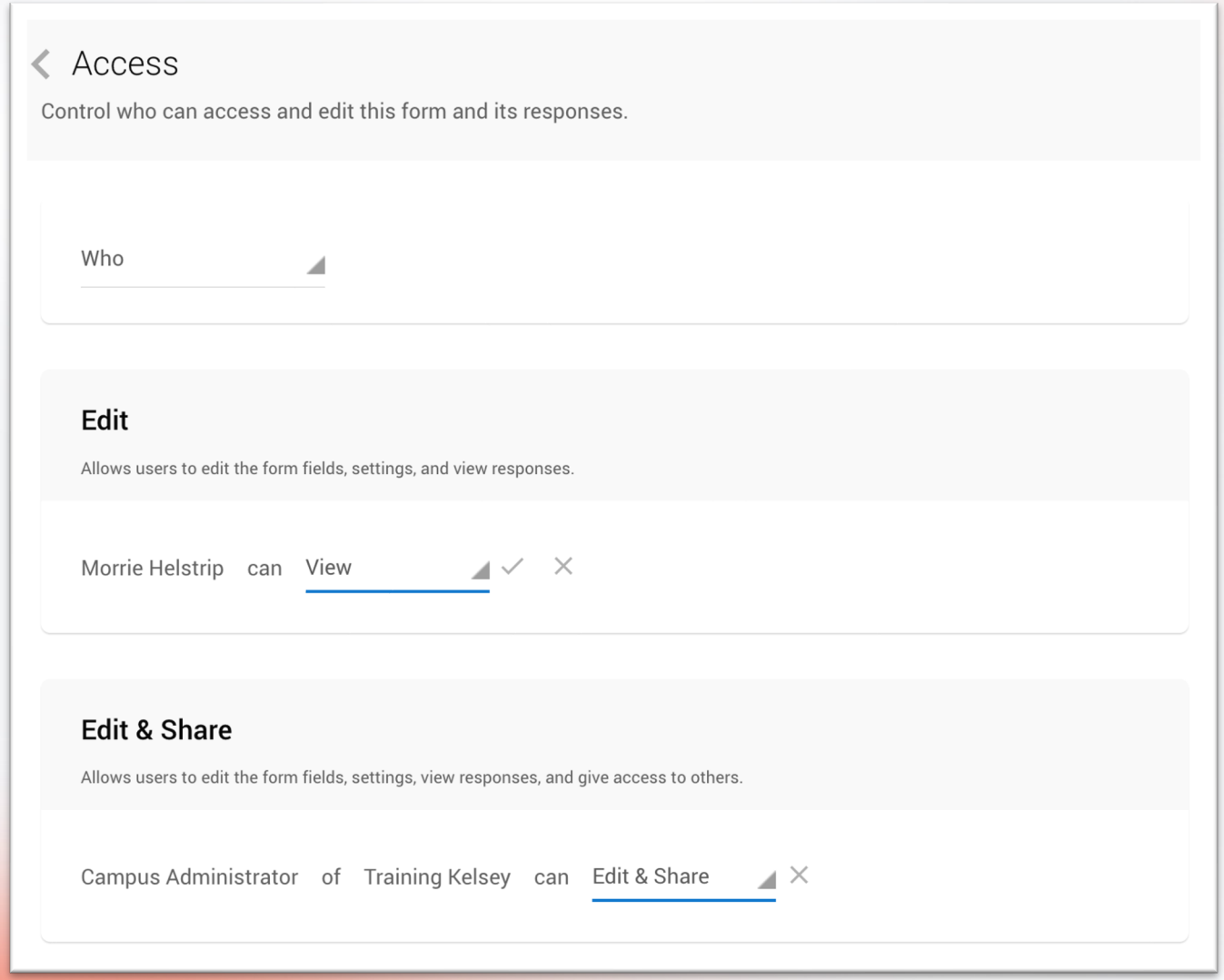
Who can make forms?

- ✅ Campus Administrators
- ✅ Organization Administrators
- ✅ Category Administrators
- ❌ Campus View

Settings FAQs

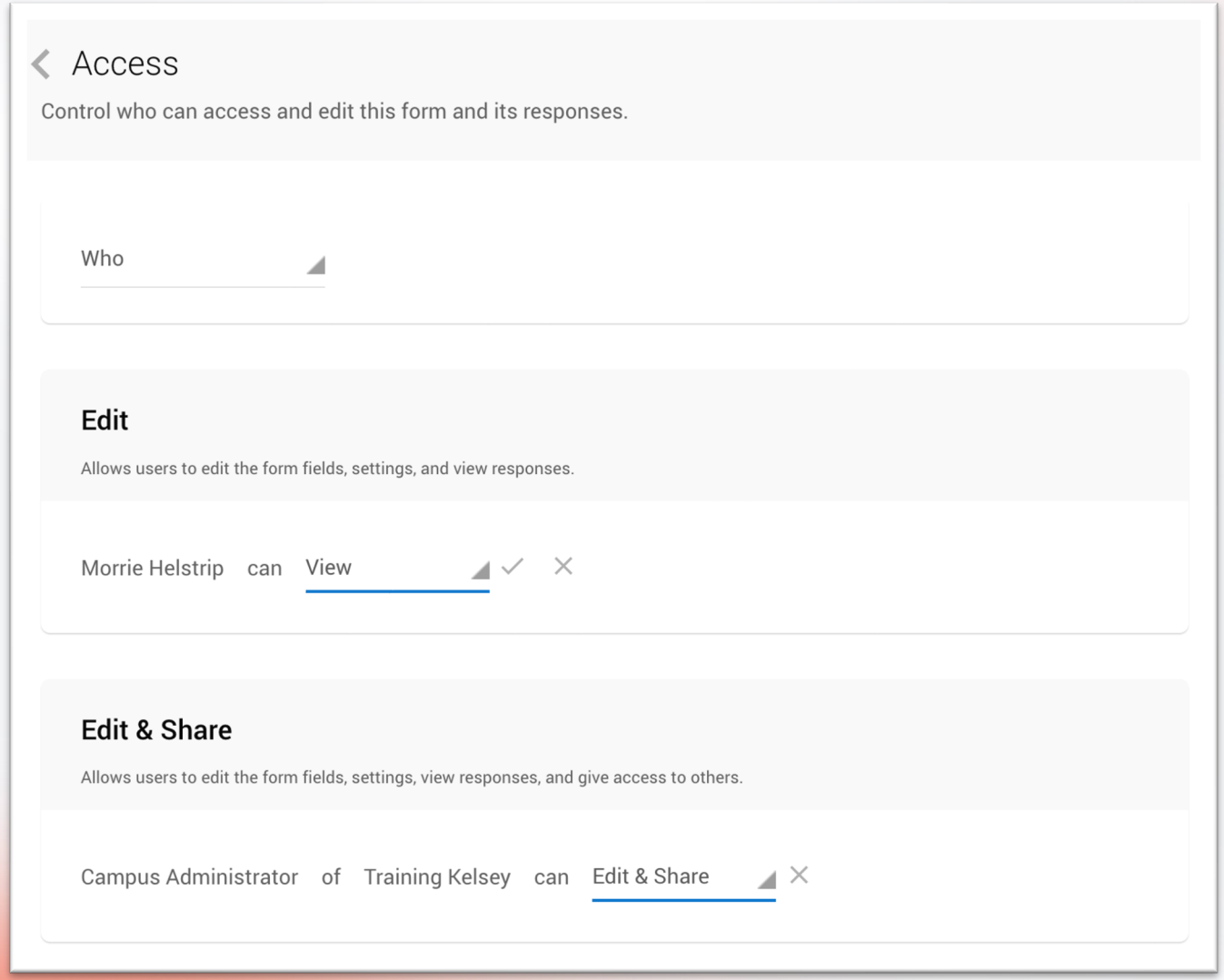
Can everyone see the forms I make?

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

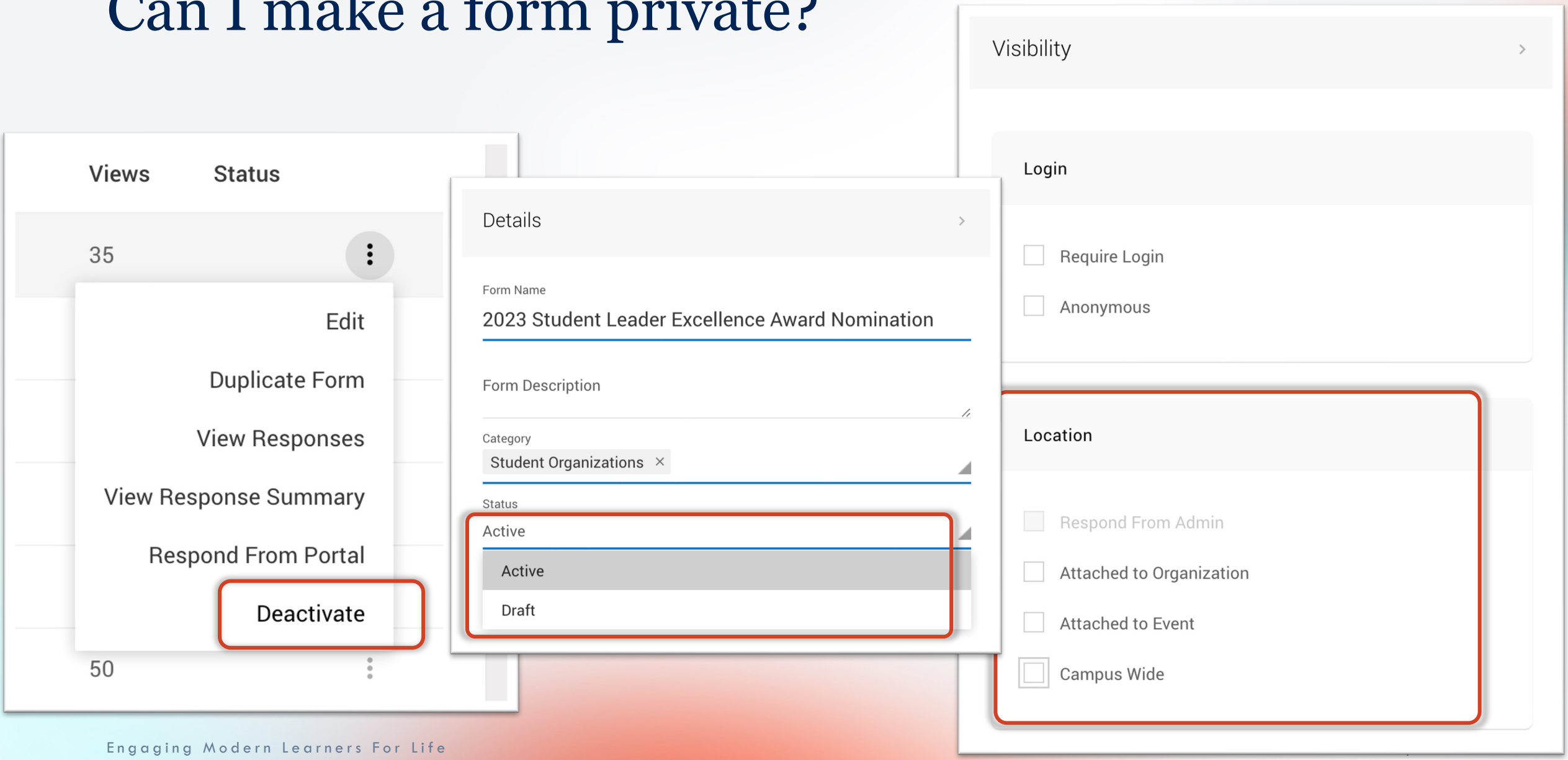


But will we lose access to a form?

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



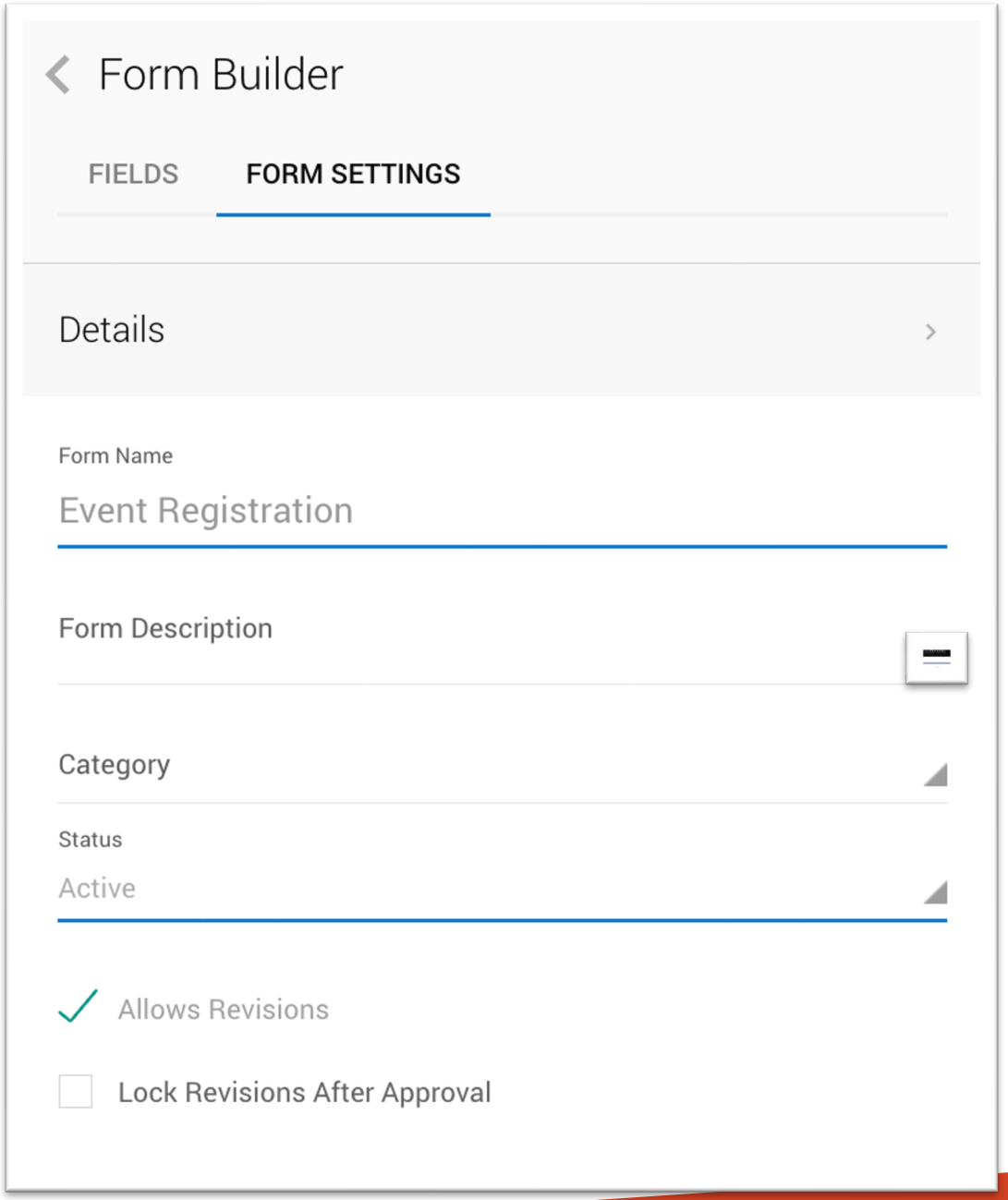
Can I make a form private?



Form Settings: Details

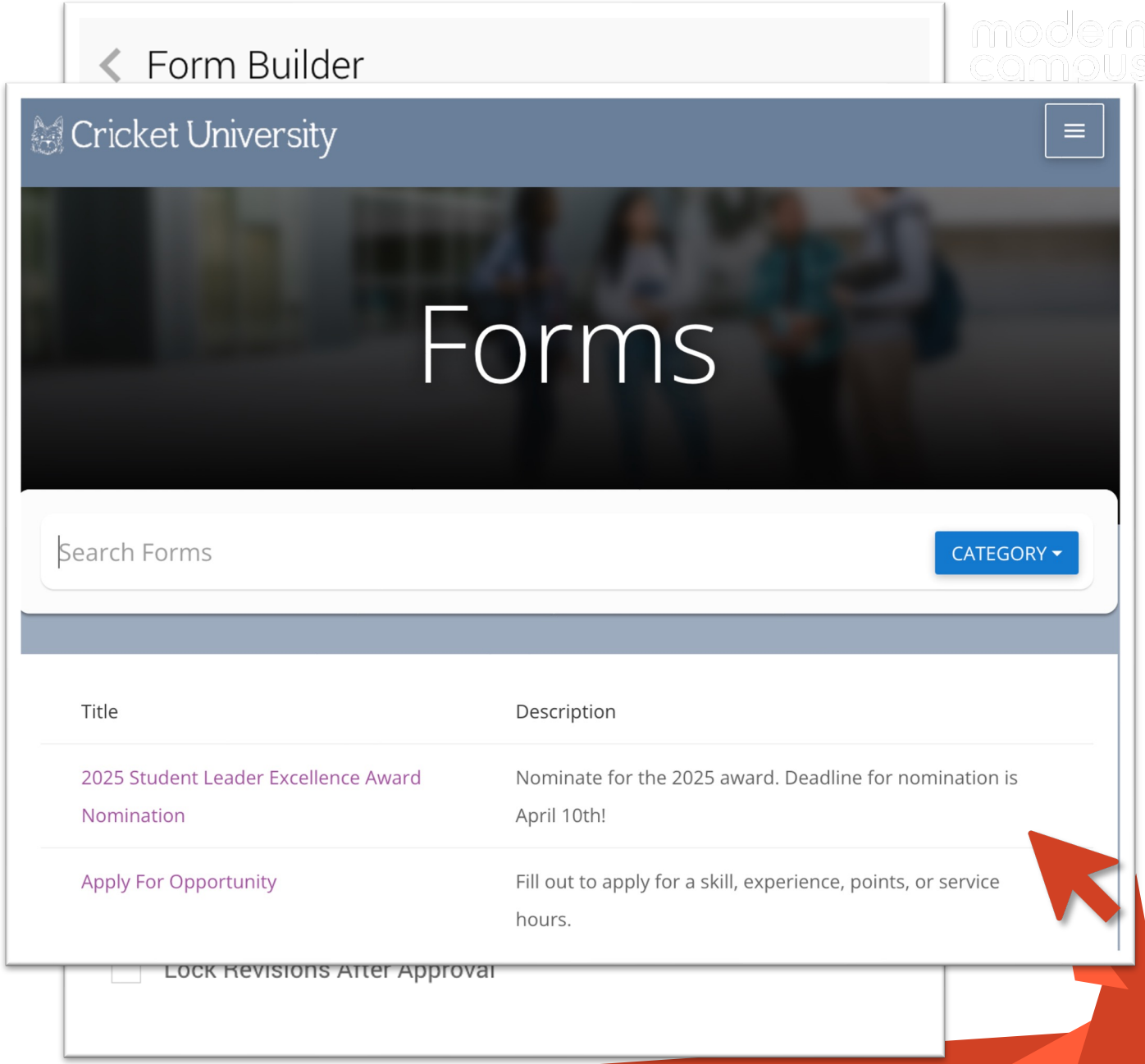
Details

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



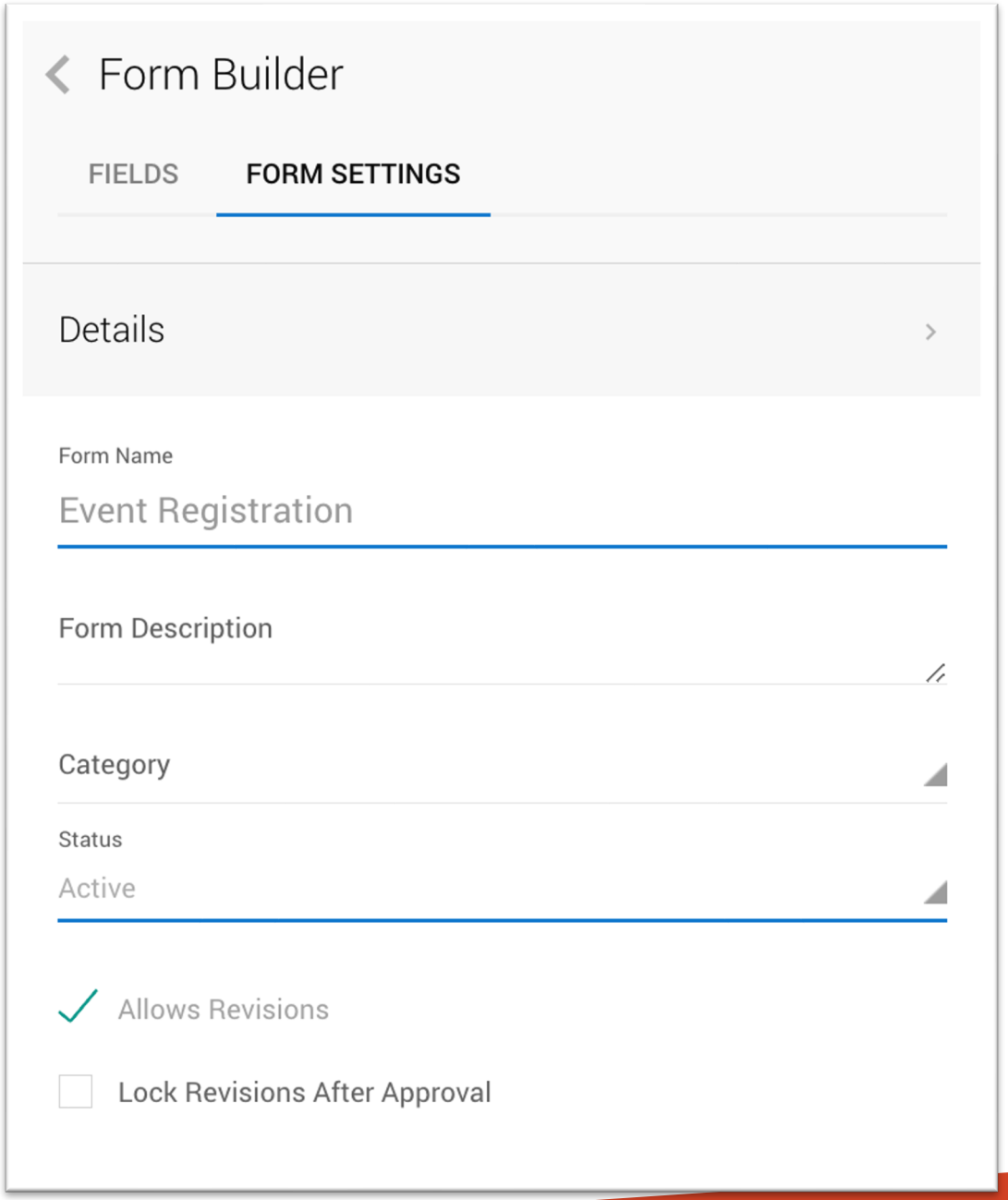
Details

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



Details

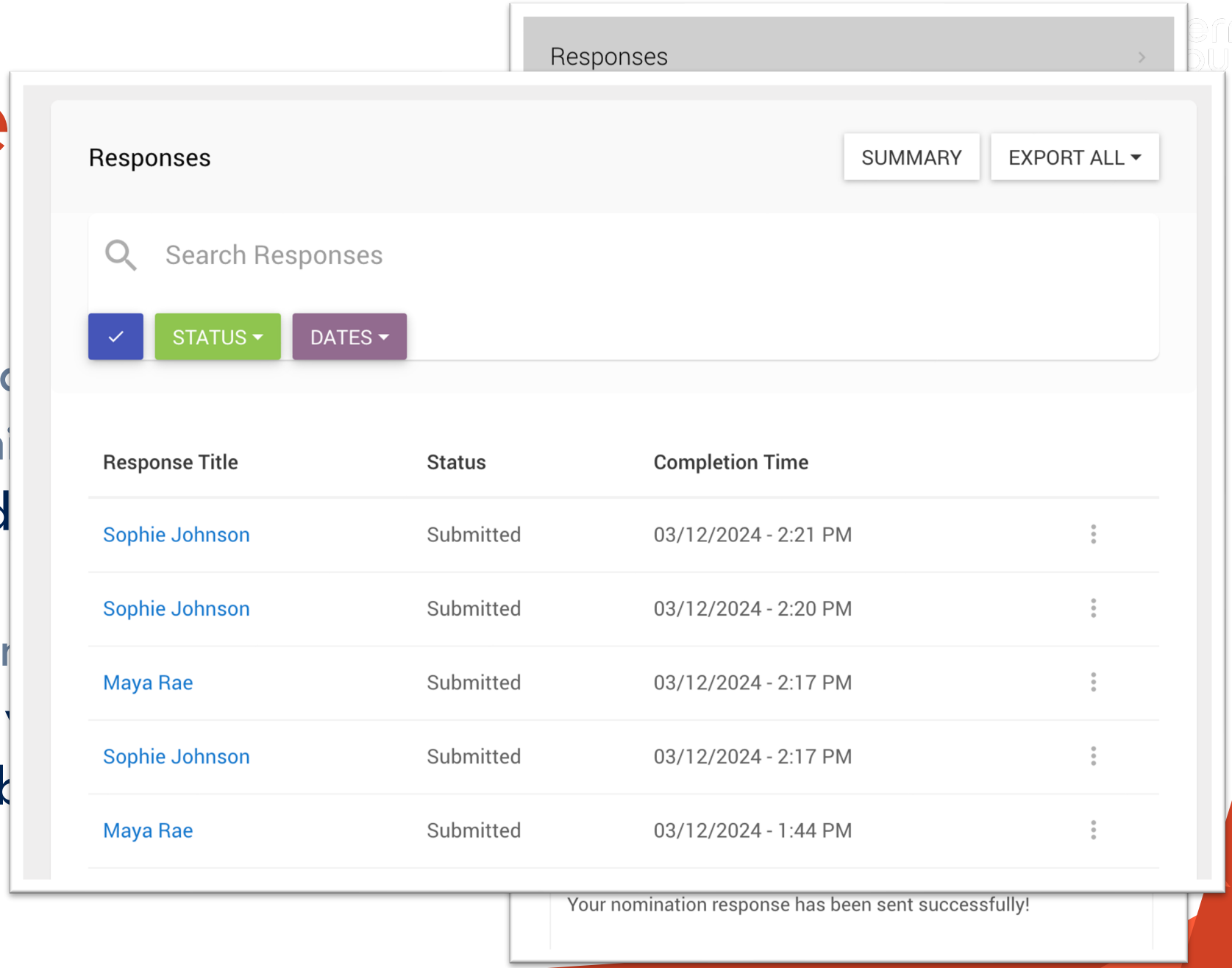
- Name – don't forget this one!
- Description
- Status
  - Active to use
  - Draft to pause
- Allow revisions
  - Student can revise
  - Admin can revise



Form Settings: Responses

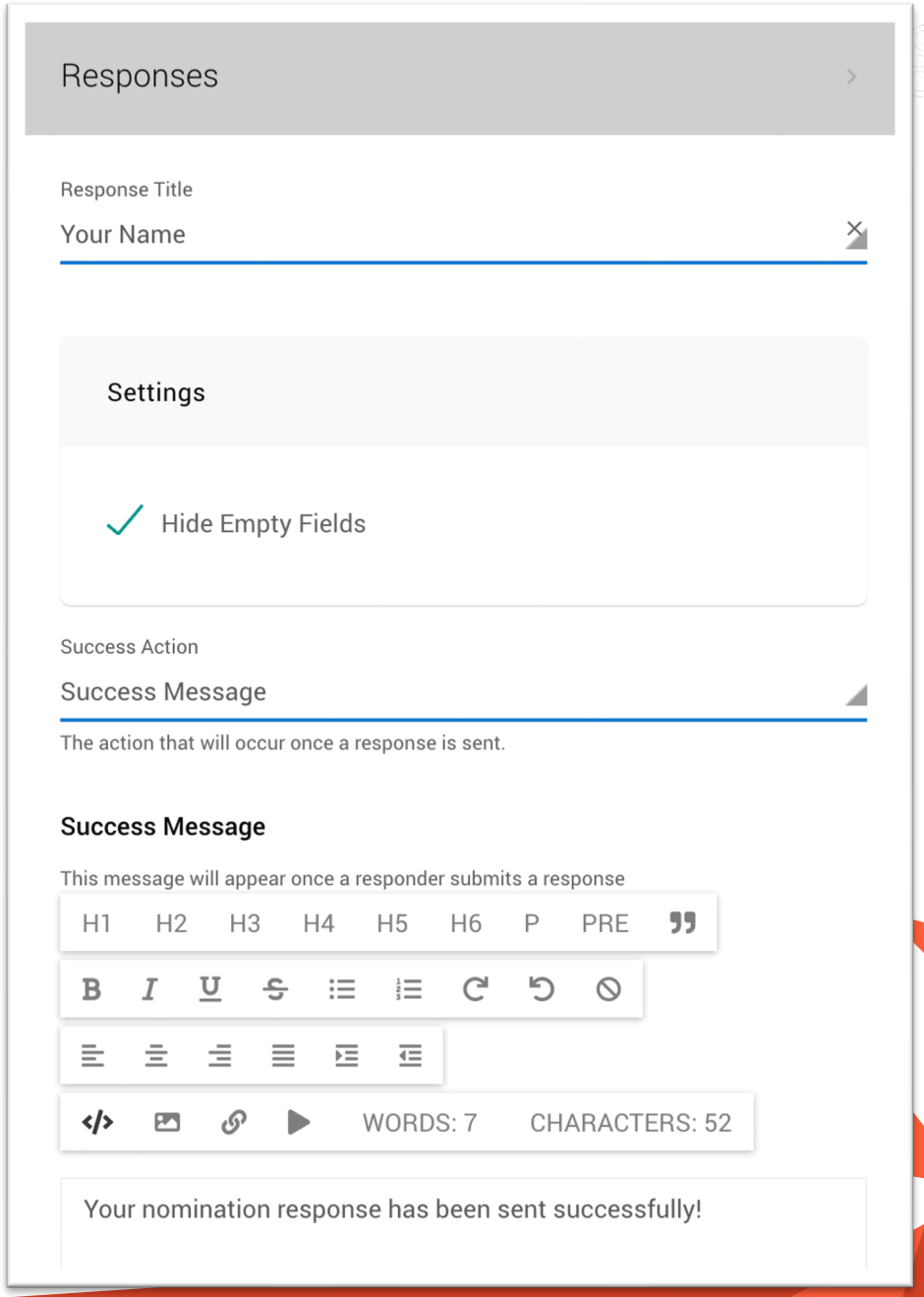
Response

- Response Title
  - Administrative
  - What do you wa
    when you see thi
- Hide Empty Field
  - Use it or lose it!
  - Great for conten
- Success Action –
  when I press "Sub



Responses

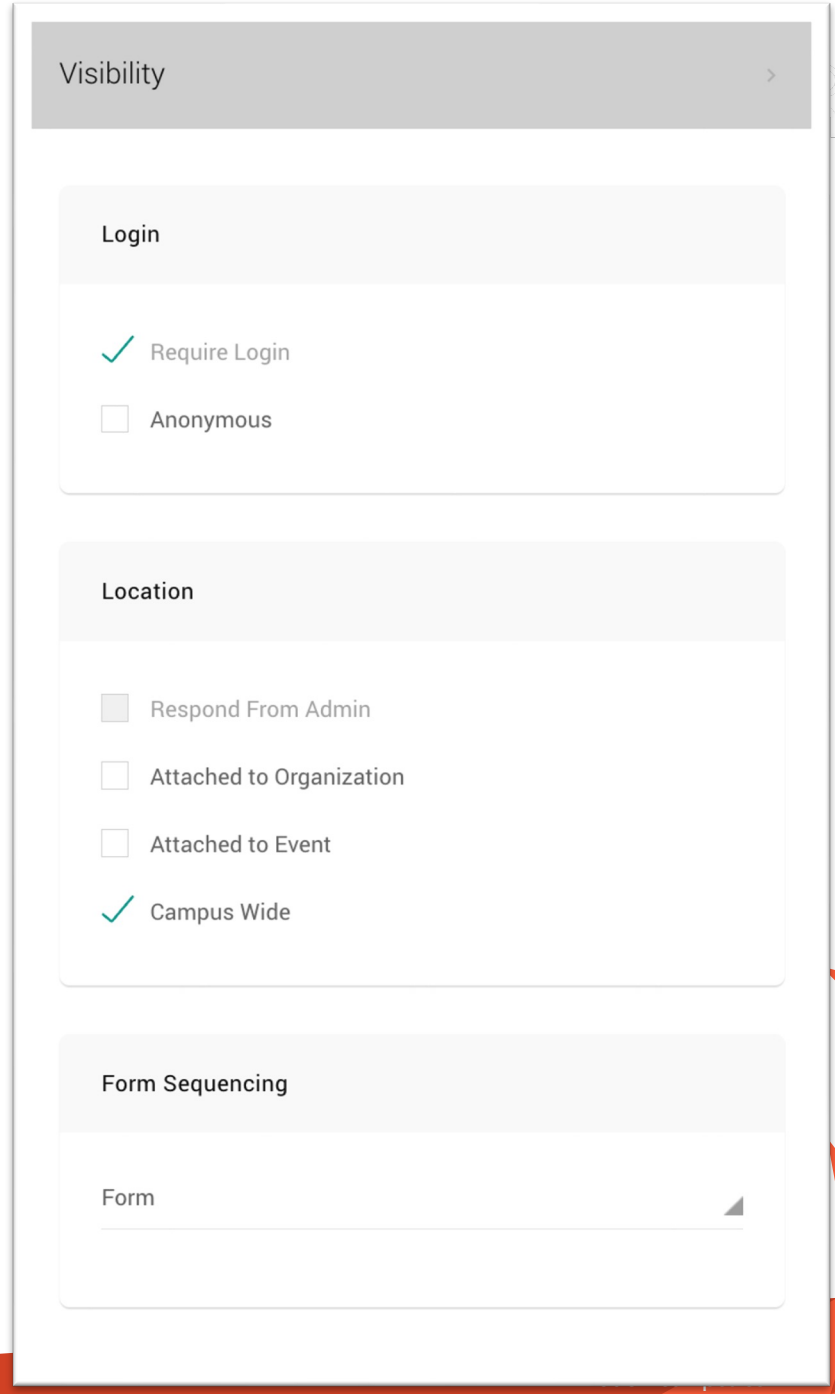
- Response Title
  - Administrative
  - What do you want the title to be when you see this in your dashboard?
- Hide Empty Fields
  - Use it or lose it!
  - Great for content building fields
- Success Action – what happens when I press "Submit?"



Form Settings: Visibility

Visibility

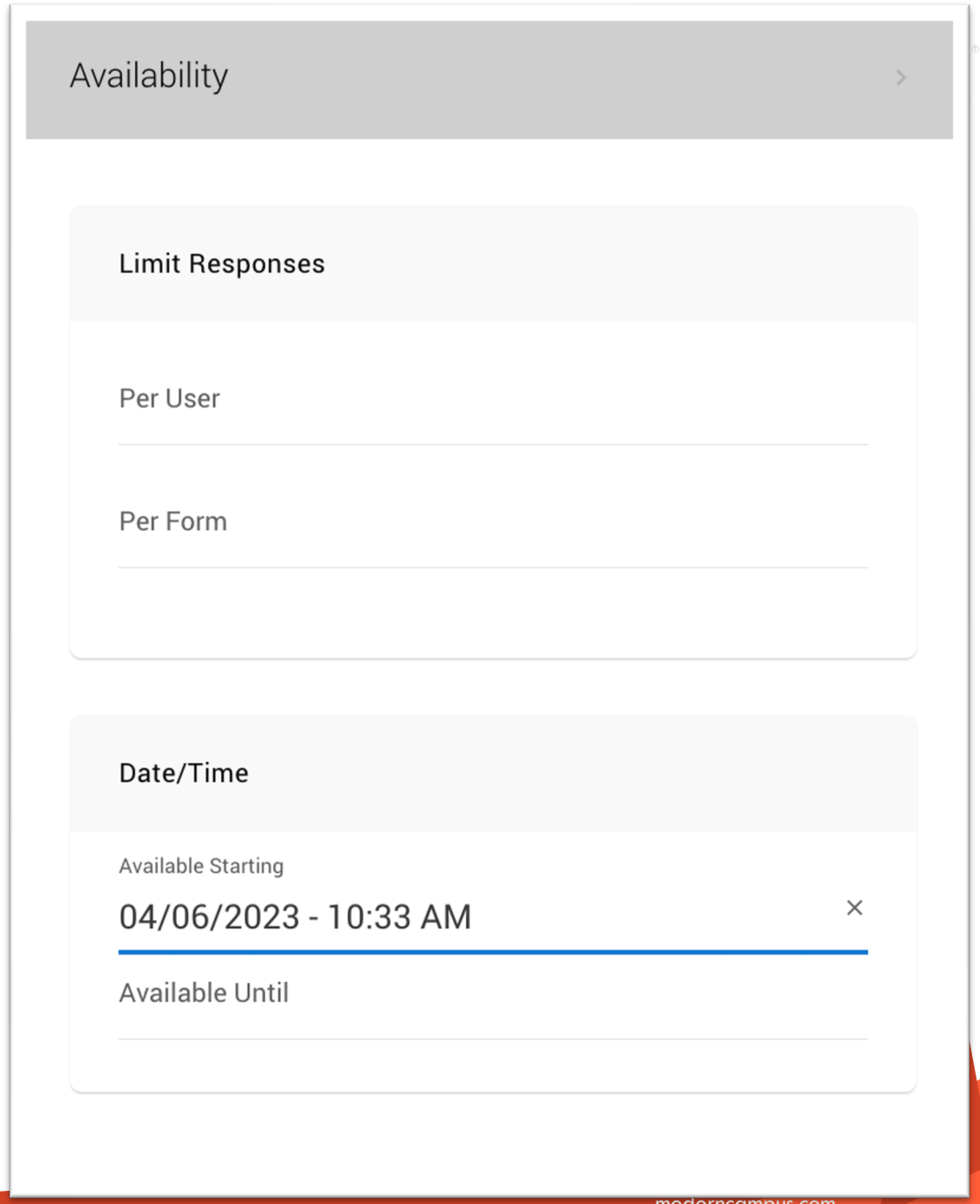
- Require Login
  - Do you want to ensure **ONLY** folks from your institution fill it out?
- Anonymous
  - No names
  - You can still require login and limit responses!
- Location
  - **Where** do you want this form to show up on your student portal?



Form Settings: Availability

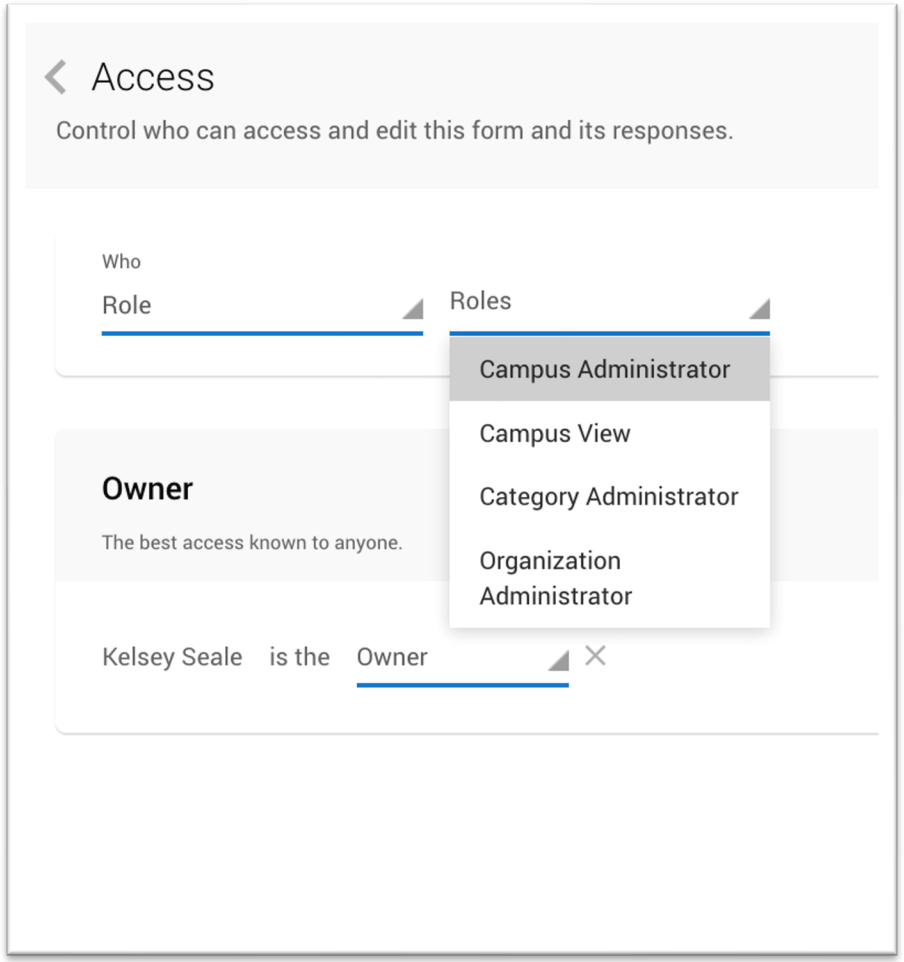
Availability

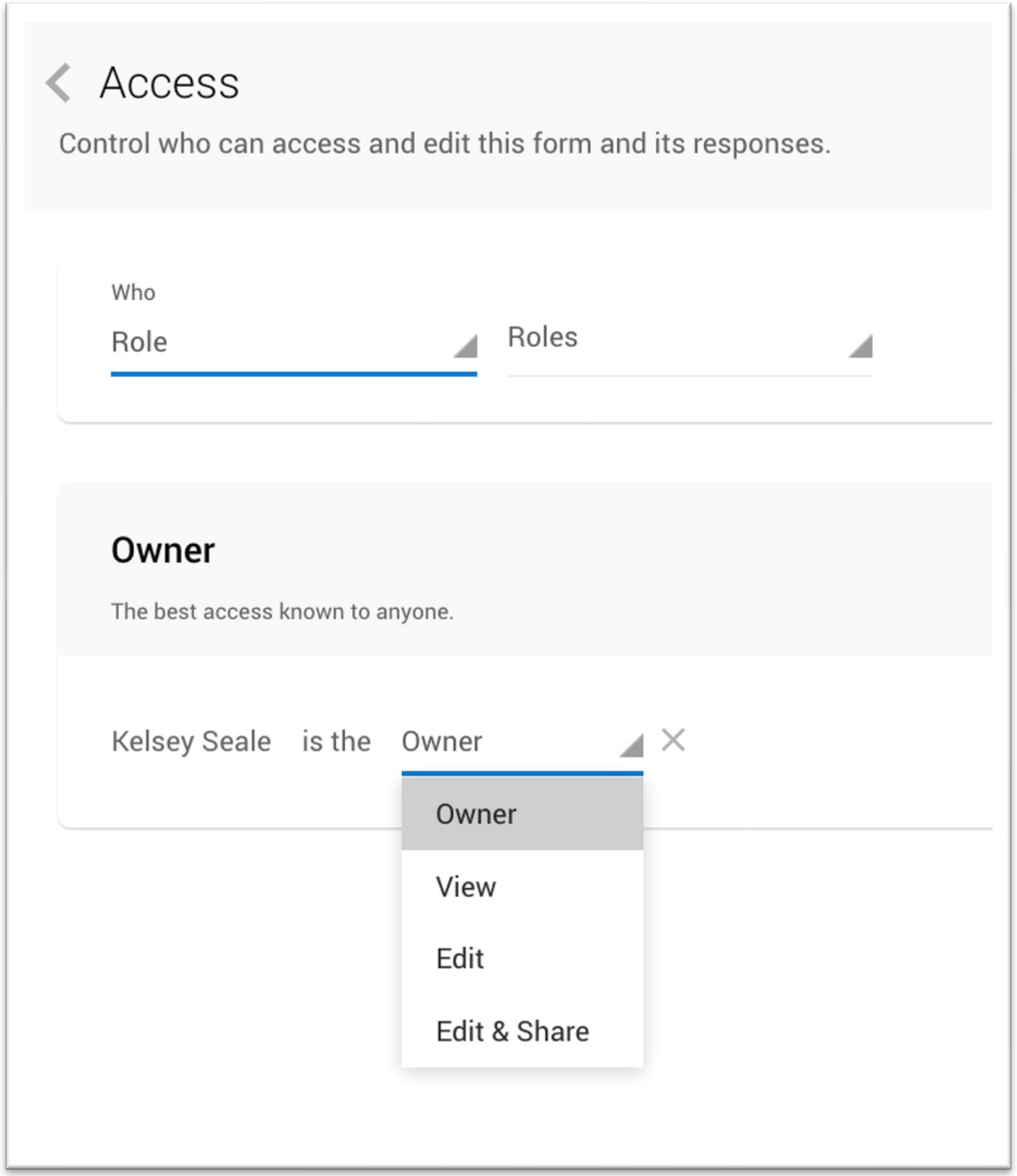
- Per User
  - Kelsey can only fill this form out once
- Per Form
  - Only 25 people can register for this event
- Date / Time
  - Leave blank for continuous use



Form Settings: Access

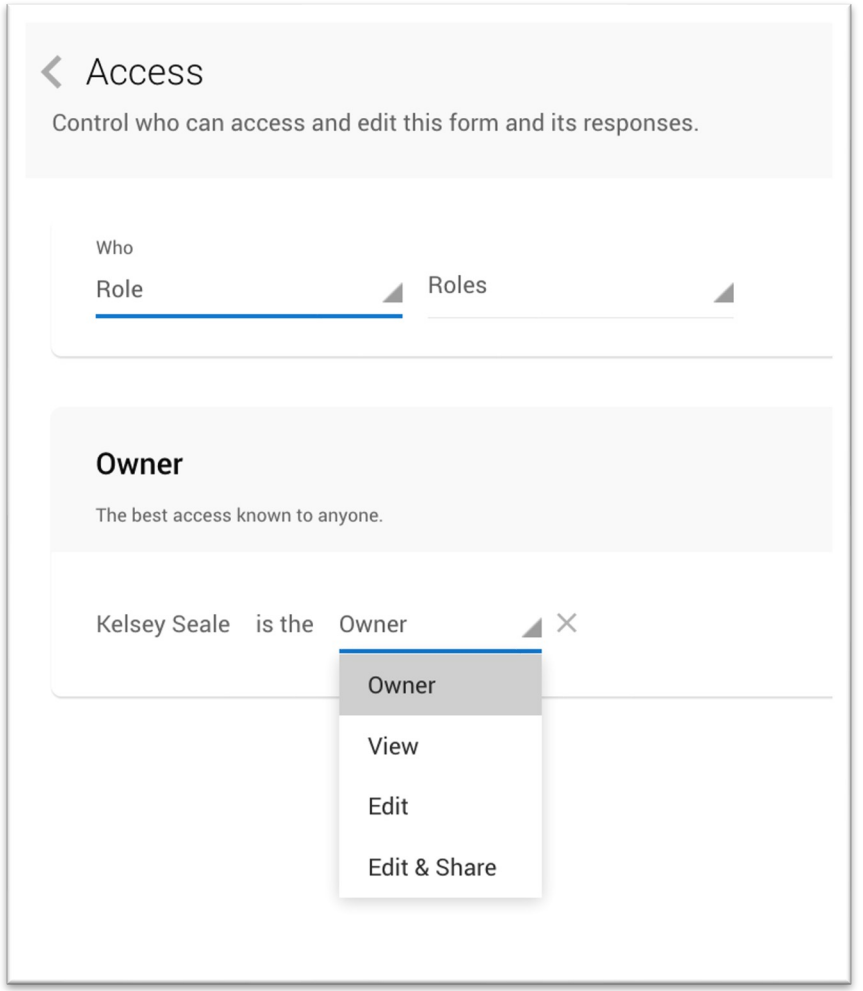
Access


Access
Control who can access and edit this form and its responses.
Who
Role
Roles
Campus Administrator
Campus View
Category Administrator
Organization Administrator
Owner
The best access known to anyone.
Kelsey Seale is the Owner


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

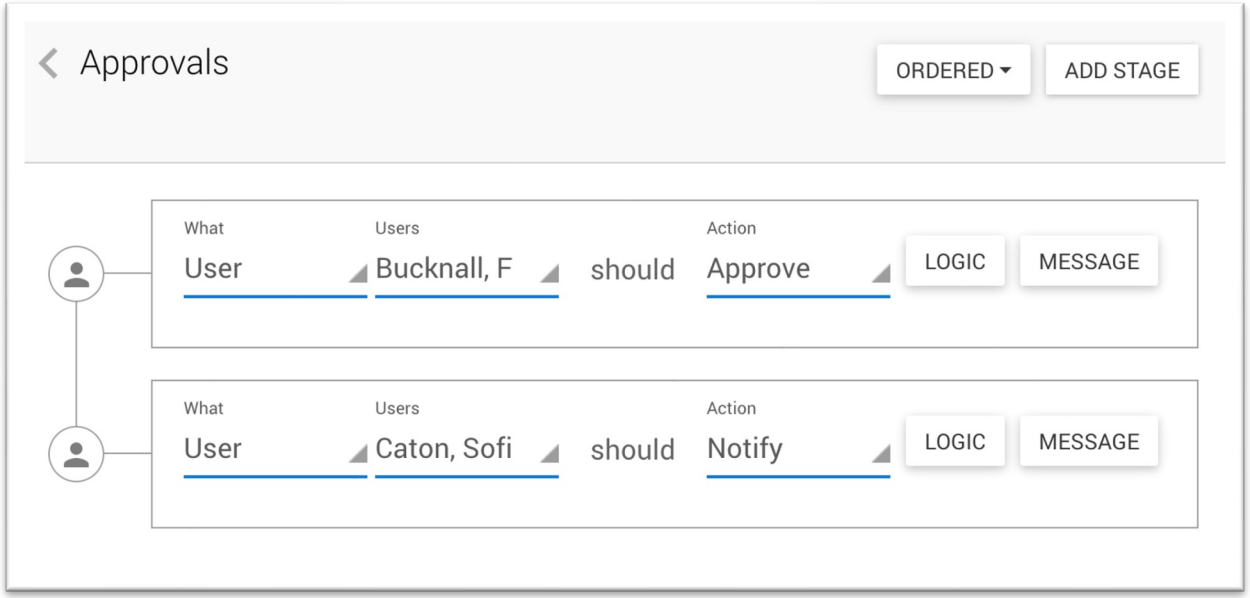
- Owner: Full control
- View: View form and response, no edits
- Edit: Modify form structure and settings
- Edit+Share: Modify and share to allow for collaboration



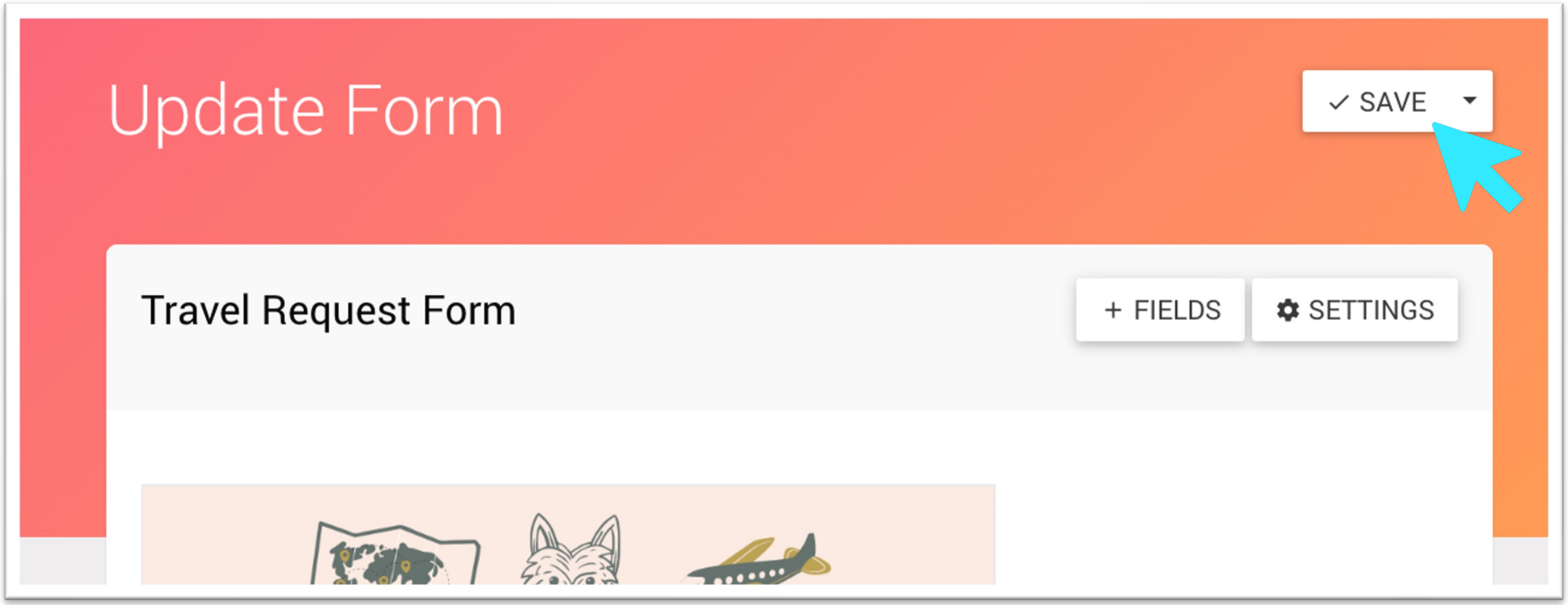
Form Settings:
Approval + Notifications

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



SAVE SAVE SAVE!!!!



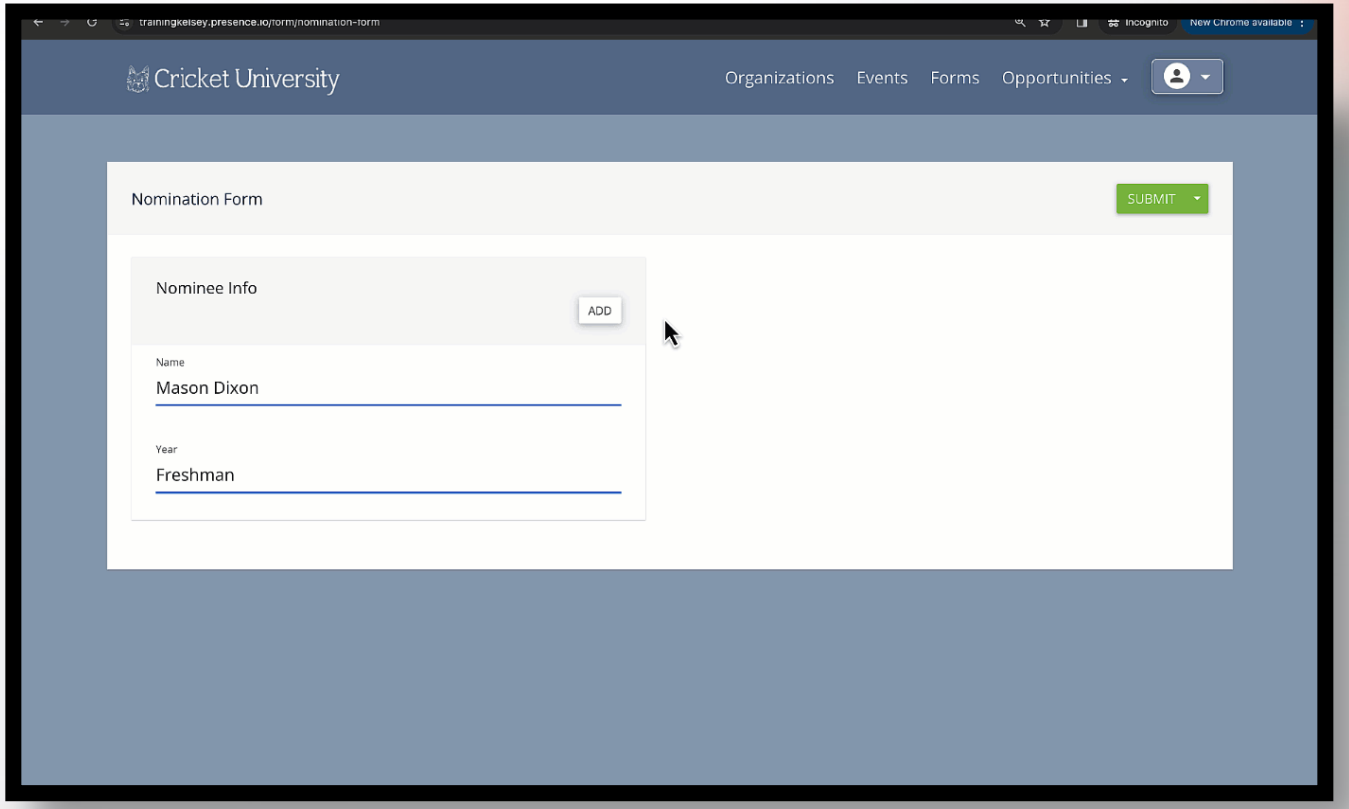
Settings Quiz!

Repeatable Fields

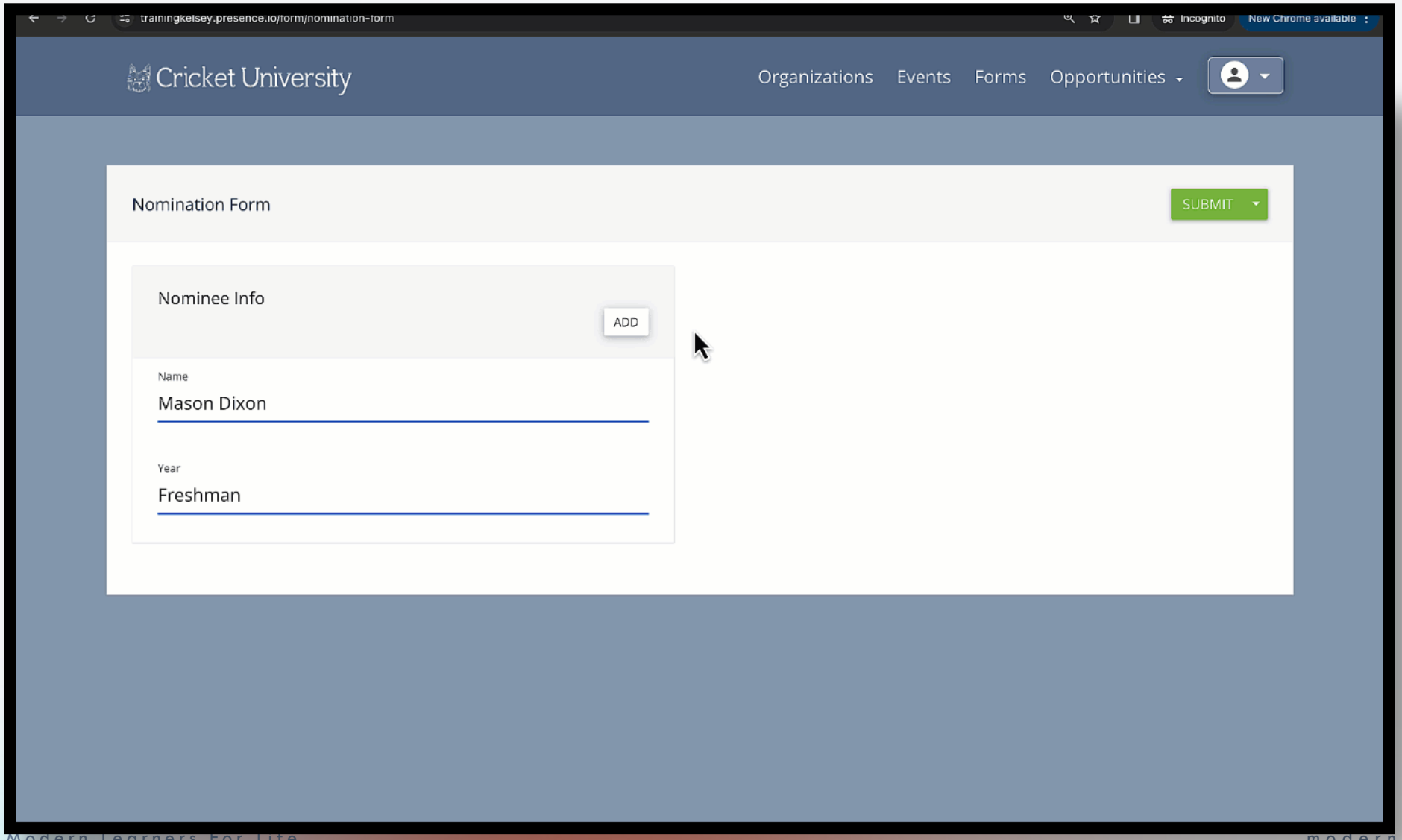
Field Setting Highlight!

Repeatable Field

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

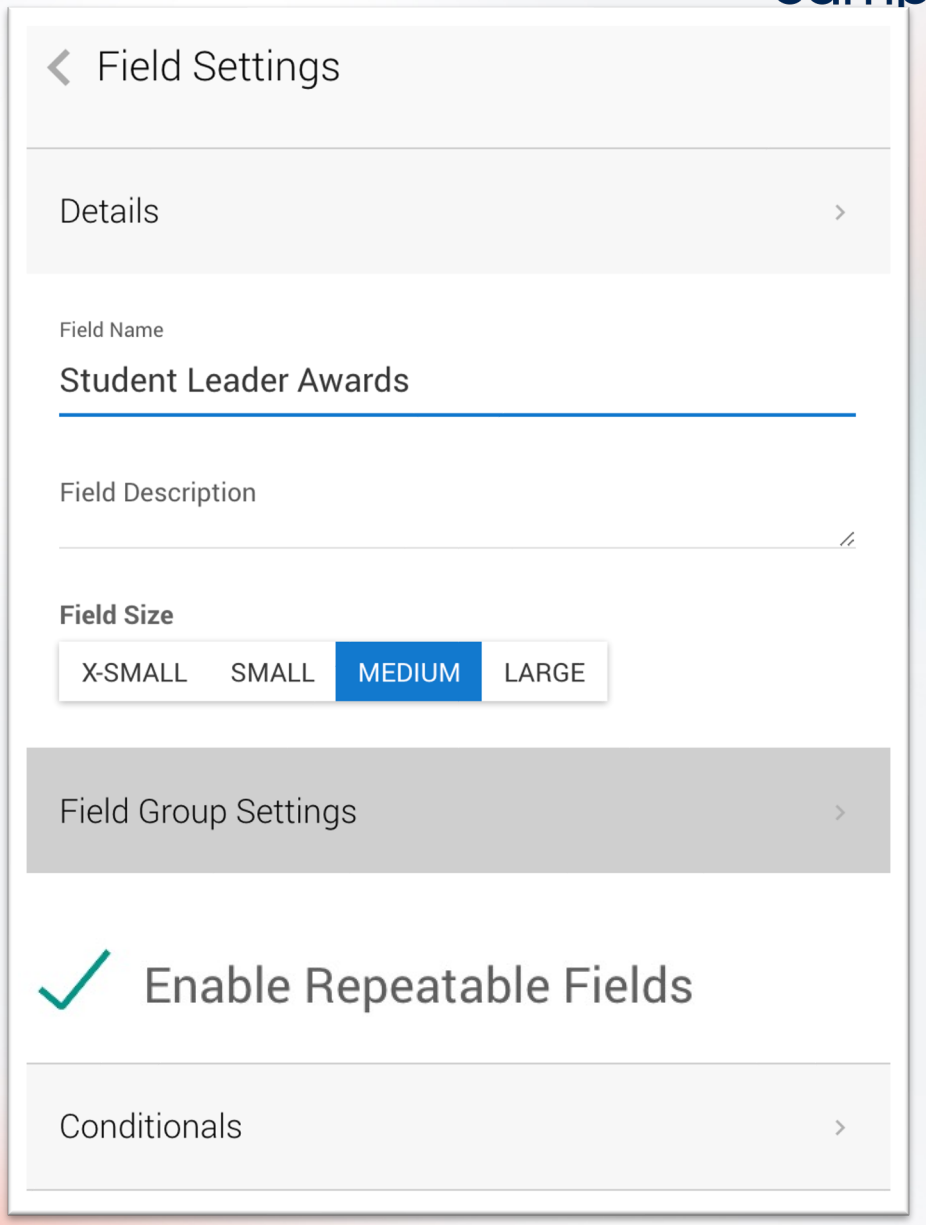


Repeatable Field

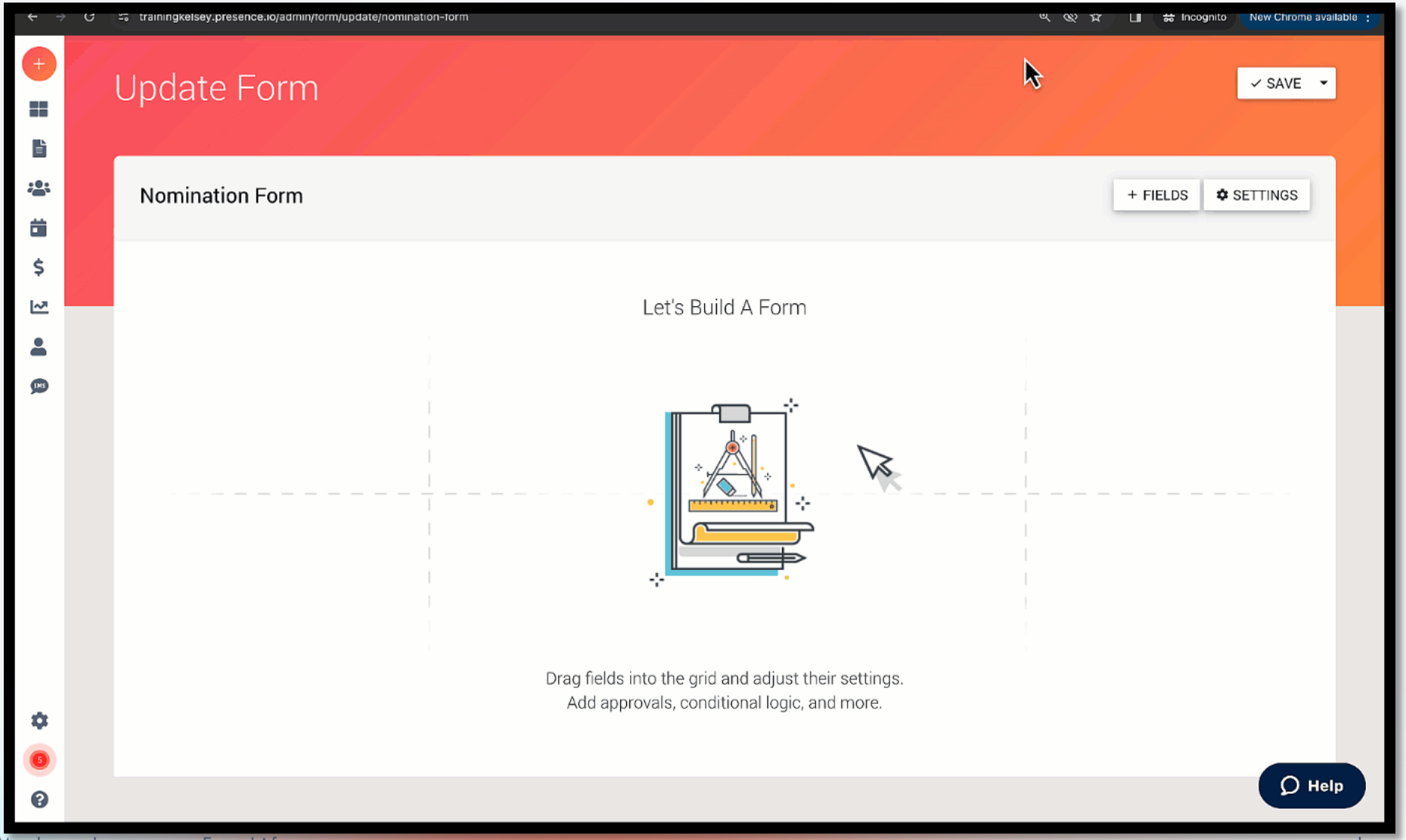


Repeatable Field Set Up

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.

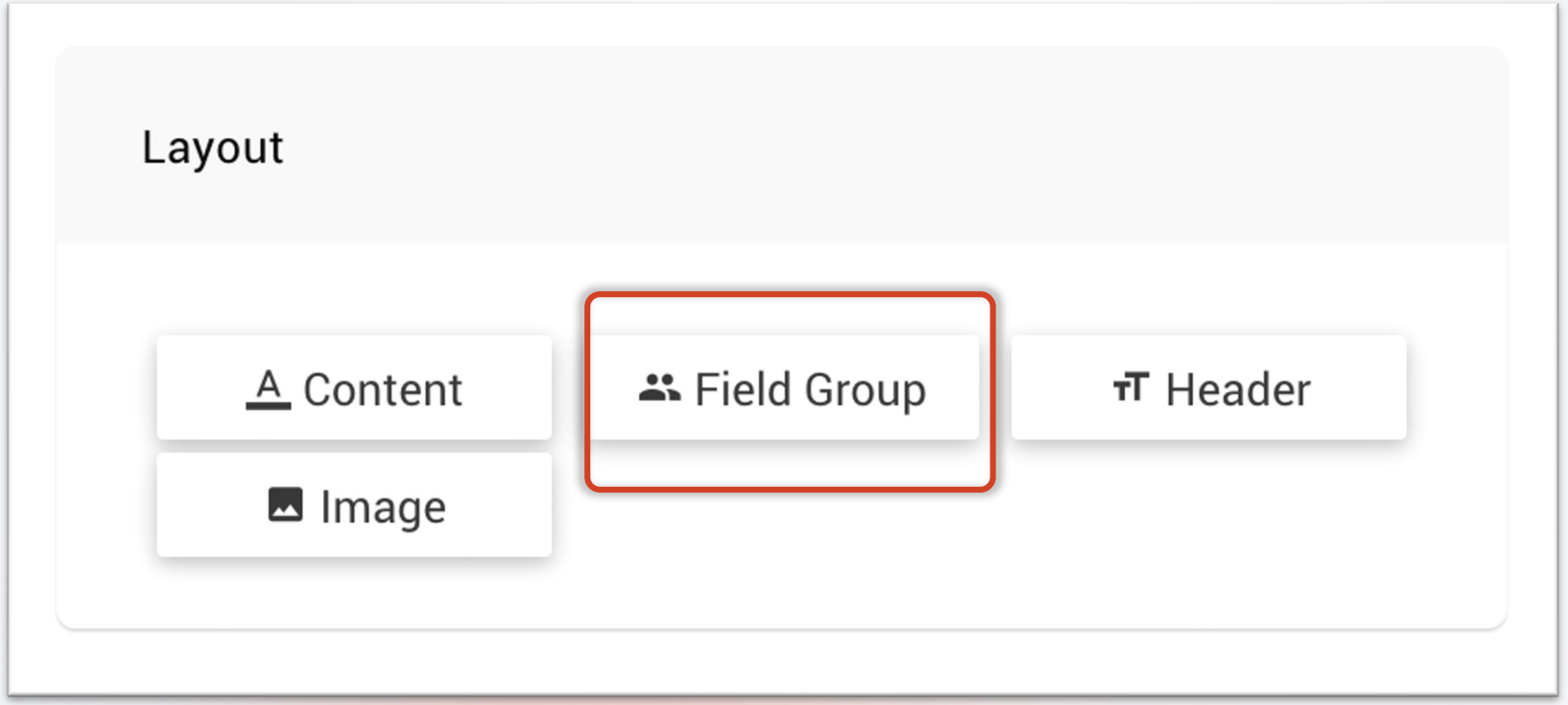


Repeatable Field Set Up



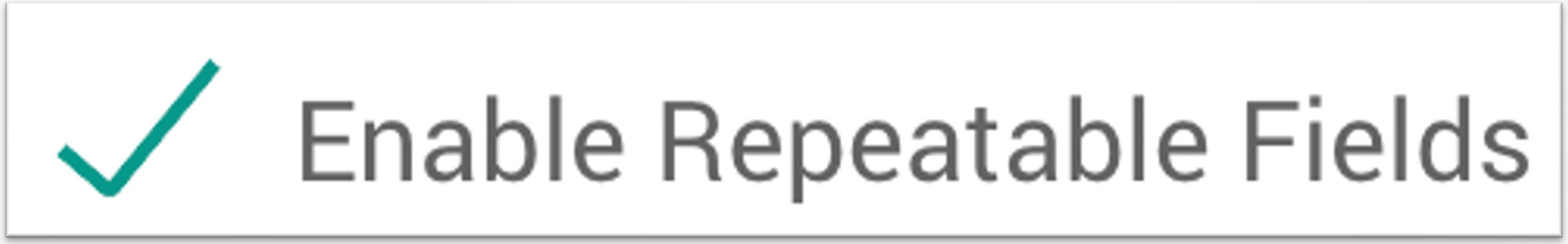
Repeatable Fields Tip

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



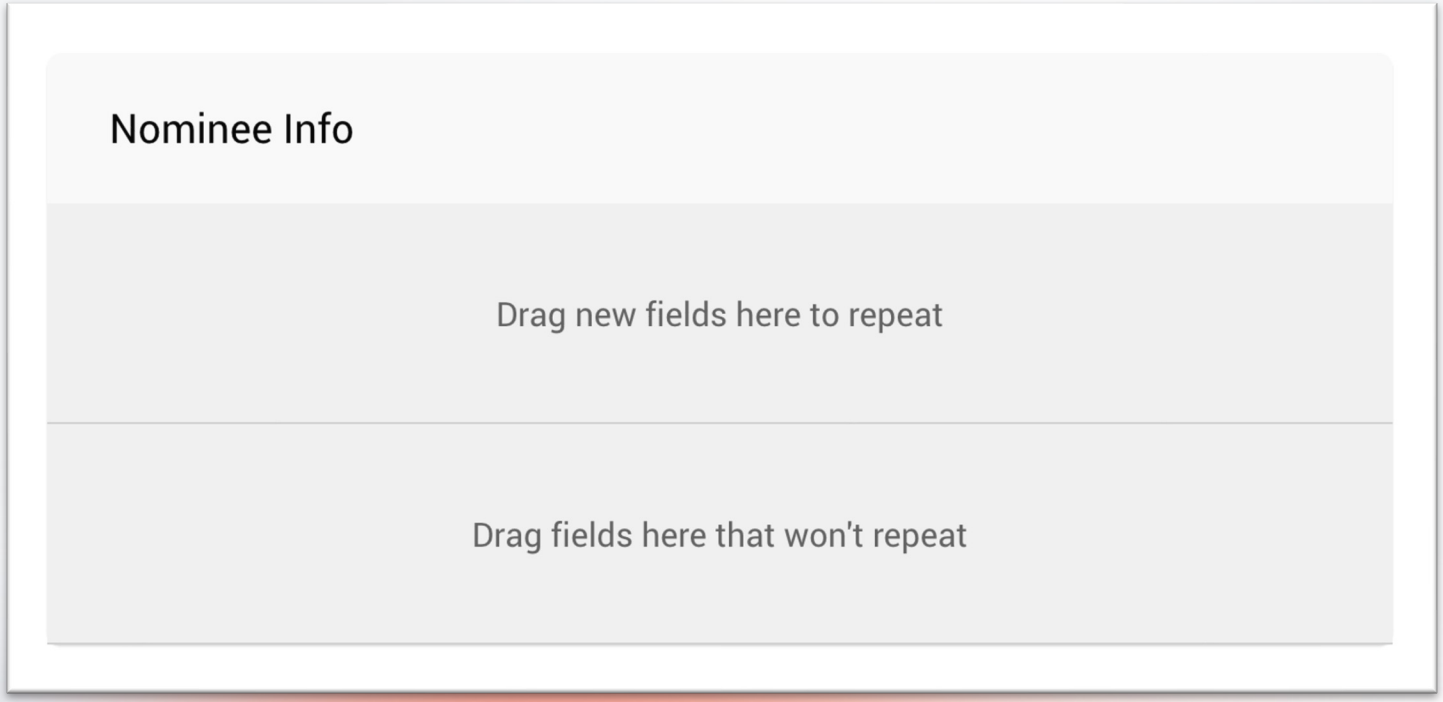
Repeatable Fields Tip

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



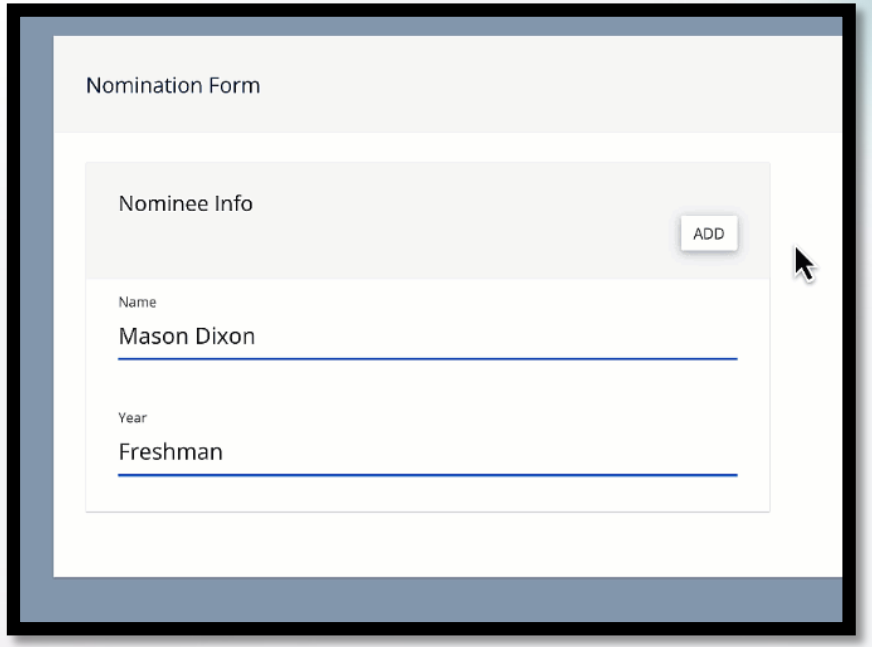
Repeatable Fields Tip

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.



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!