

How to Create Forms For my Organization

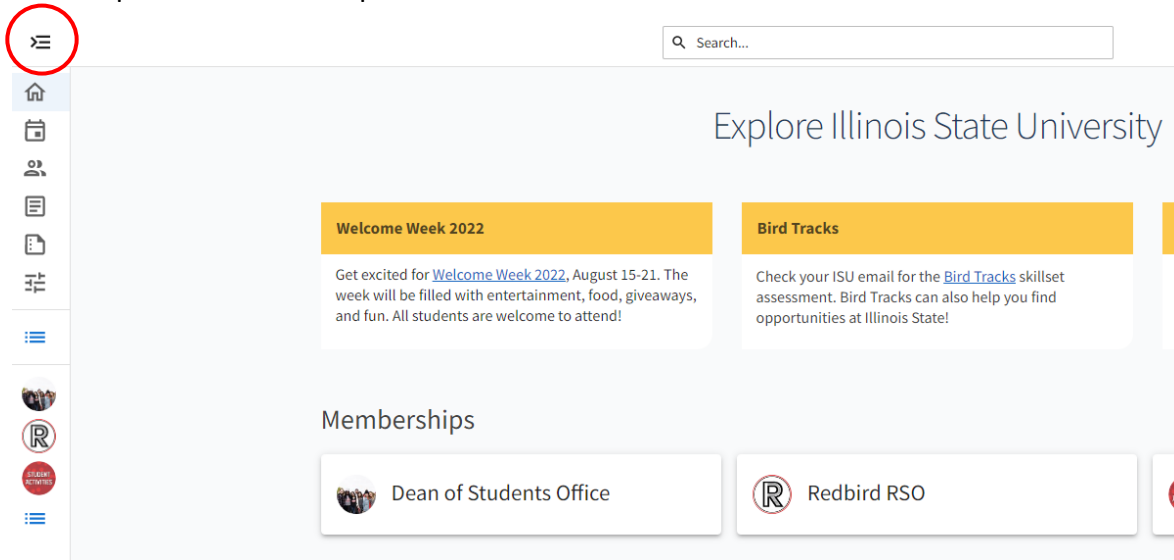
These instructions explain how to create and manage forms for your organization in the Redbird Life Portal. To accomplish this, the user must first be listed as an officer on the roster of the organization they wish to create the form for.

Log on to <https://RedBirdLife.IllinoisState.edu>

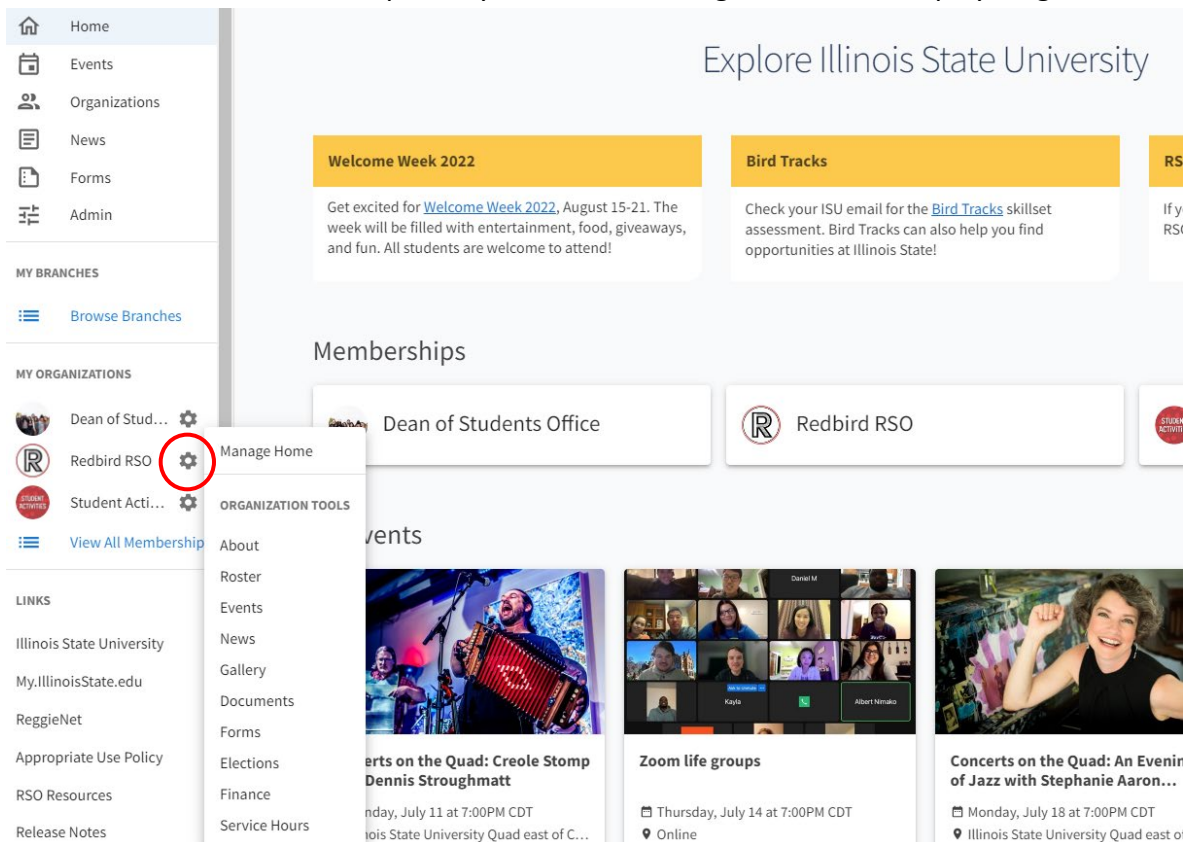
- Select 'Sign In' on the top right corner.
- Log in with your ULID.

Navigate to RSO Profile Tools

- Once you've successfully logged in to the system, select the button on the upper left side of the screen. This will expand the sidebar options.



- Click the "Gear Icon" next to the RSO profile you want to manage in order to display 'Organization Tools'.



Creating Forms

1. Select the 'Forms' option from the ribbon on the left side of the page.
2. To create a form, select the blue button in the top right corner.
3. If at any time you'd like to exit out of this stage of creating a form, and you'd like to come back to it, simply click the 'Save' button on the bottom of the page. When you return to edit the form later, it will appear in the 'Manage Forms' page. Unfinished forms will **not** have a 'Submissions' link next to them, to edit the form simply click on the name of the form (Figure 3).

Figure 3:

Select	Name	Start Date	End Date	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example Form	5/7/2019 11:00 AM	5/7/2019 9:00 PM	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Festival ISU - RSO and ISU Department Registration - 2019	2/21/2019 8:00 AM	8/1/2019 4:30 PM	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Test 3	7/10/2019 3:00 PM	8/10/2019 3:00 PM	Properties	Copy	Share	Submissions

4. Enter an appropriate name for your form in the 'Name' field (Figure 4).

Figure 4:

*** Name**
test 2

Status
 Active

Start Time
7/10/2019 02:15 PM

End Time
8/10/2019 02:15 PM

Multiple Submissions
 Allow Multiple Submissions

Anonymous Submissions
 Allow Anonymous Submissions From Public Users

Submission Restrictions

By default, anyone on campus can respond to this form. You can restrict access to specific positions below.

The following positions can always respond:

- ✓ Primary Contact
- ✓ DOS Admin
- ✓ University Department/Unit Liaison

Restrict to the following positions:

- All Members of Dean Of Students Office

CANCEL SAVE SAVE AND ADD QUESTIONS

5. Check 'Active' under the 'Status' field to make the form active. This gives form creators the option to build forms with or without it being accessible to others. This box does not need to be checked to

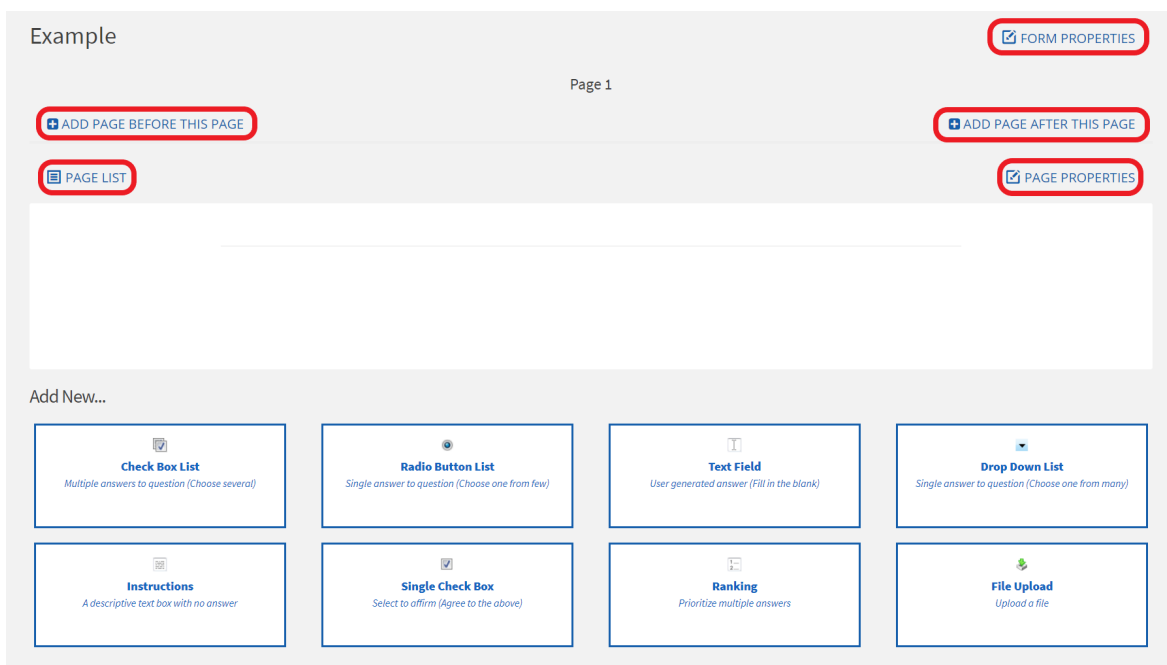
continue, but if this is not checked during this stage you will have to go back and check the box later to make it viewable and function correctly.

6. Checking the 'Featured in Explore Forms' box will place a star next to your form and feature it at the top of the forms directory.
7. Checking the 'Hide from Explore Forms' box will **restrict** this form to be seen and searched for in the forms directory.
 - If this box is checked, you will have to share the form with your organization's members via link.
8. The start and end times and dates dictate when your form will start and stop accepting submissions from your organization. These times will auto-generate to an hour after the form was started. Similarly, the end time will auto-generate to a month after the form is started. Both can be changed.
9. It is **not** recommended that your organization allows anonymous submissions from public users. Checking this box would allow anyone in the world who visits the Redbird Life Portal or has the form URL to submit as many responses as they'd like.
10. Choose whether you would like to accept multiple submissions from those filling out your form. The default setting is to **not** allow multiple submissions.
11. Checking the box under the 'Restrict to the Following Positions' heading will allow only members of your organization to view and find the form in the forms directory.
12. Once you are satisfied with the settings on this page click the blue 'Save and Add Questions' button on the bottom right of the page (refer to Figure 4).

Adding Questions to a Form & Selecting Reviewers:

1. Once you've reached the question page, you can Add pages to your form by clicking either the 'Add Page Before This Page' or the 'Add Page After this Page' links (Figure 5).

Figure 5:



2. Select the 'Page List' button on the left to add more pages to your form, select the page you wish to add questions to, or reorder the pages you have.

- You can also go to different pages within the form by clicking the arrows to the right and left of the 'Page #' heading.
3. Clicking on the 'Page Properties' button on the left will allow you to name pages, decide if the form should have a back button. This menu also gives you the option to utilize skip logic.
 - To find out more about how to use skip logic in your forms, click [here](#).
 4. The boxes under the 'Add New...' heading are all the different types of questions and fields you can add to your form.
 5. Once you've added questions to your form, you can edit the questions by clicking the pencil button to the left of the question (Figure 6).

Figure 6:

Example Form FORM PROPERTIES

Submissions have already been collected using these fields. Any changes beyond spelling corrections may result in data loss.

Page 1 →

+ ADD PAGE BEFORE THIS PAGE + ADD PAGE AFTER THIS PAGE

PAGE LIST PAGE PROPERTIES

Page 1

Page: 1 Sequence: 1 🗑️

This is a demographics questionnaire created to track information about our members!
Please answer the questions to your best ability!
Thank you!

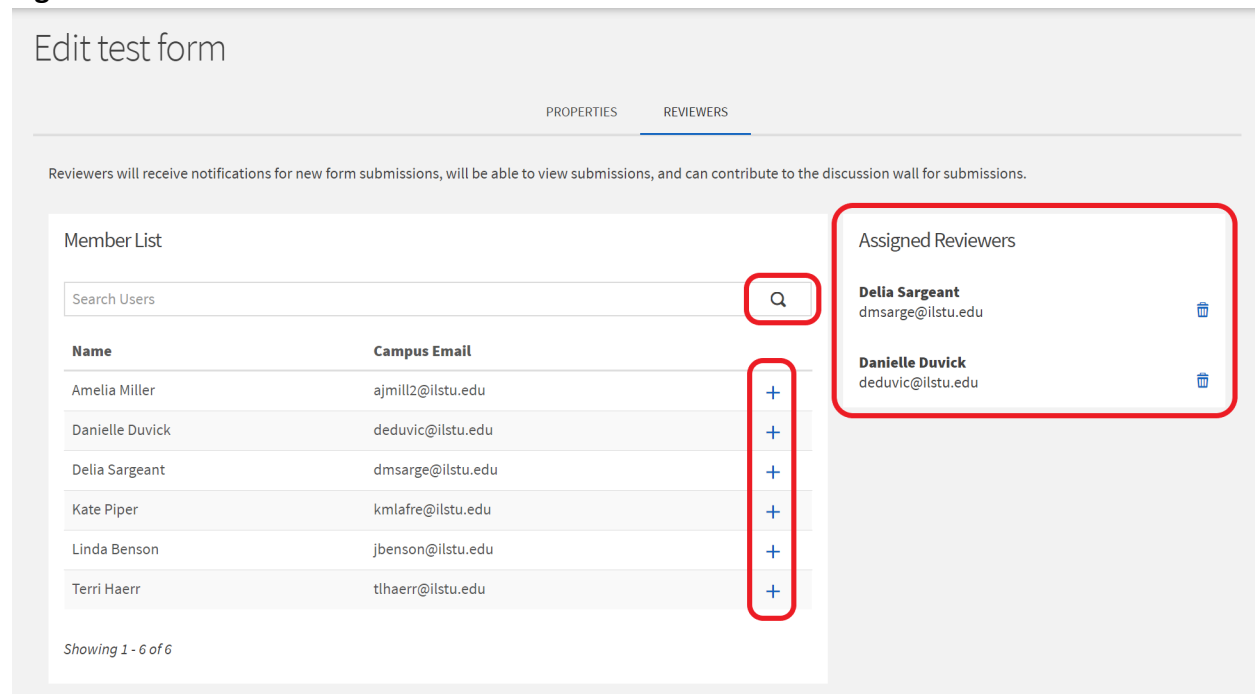
Page: 1 Sequence: 2 🗑️

* What year are you in the University?

- Freshman
- Sophomore
- Junior
- Senior
- Graduate Student

6. You can also change the page and sequence of your questions by changing the number in the respective drop-down boxes above the question (refer Figure 6).
7. To adjust any settings, click the 'Form Properties' link near the top of the page (refer to Figure 6).
8. To select your designated reviewers, click the 'Reviewers' tab on the top of the page, next to the 'Properties' tab (Figure 7).
 - Assigned reviewers are the only members of the organization that can view submitted forms.
 - The creator of the form is automatically made a reviewer.
 - Reviewers can be changed at any time.

Figure 7:



9. Make a member of your organization a reviewer by clicking the blue '+' next to the member's name.
10. You can search your organization's roster by typing names into the search bar in the 'Member List' field.
 - You can view assigned reviewers under the 'Assigned Reviewers' heading.
11. You can remove assigned reviewers by clicking the trashcan next to the reviewer's name under the 'Assigned Reviewers' heading.
12. To return to adding questions to your form, click on the 'Properties' tab and select the 'Save and Add Questions' button on the bottom of the screen.
13. Once the form is completed, select the 'Form Properties' button on the top right of the page.
 - Remember to check the 'Active' box.
14. Select the 'Save' button at the bottom of the page to save the form.

Managing Forms

1. Once you have checked the 'Active' box on the 'Form Properties' page, your form will automatically become live and available according to the form's settings.
 - Questions may be added at this point, but any changes made may alter the data collected from submissions.
2. On the 'Manage Forms' page, you can choose to share your form via URL by clicking the 'Share' link next to your desired form (Figure 8).
 - You can also copy the form by clicking the 'Copy' link.

Figure 8:

Manage Forms [+ CREATE FORM](#)

ACTIVE ARCHIVED

ARCHIVE

Select	Name	Start Date	End Date	Properties	Copy	Share	Submissions
<input type="checkbox"/>	Example	7/11/2019 12:15 AM	8/10/2019 3:15 PM	Properties	Copy	Share	
<input type="checkbox"/>	Example Form	7/11/2019 11:00 AM	7/11/2019 9:00 PM	Properties	Copy	Share	Submissions (1 unapproved)
<input type="checkbox"/>	Festival ISU - RSO and ISU Department Registration - 2019	2/21/2019 8:00 AM	8/1/2019 4:30 PM	Properties	Copy	Share	Submissions

- To edit any settings of a form, click the 'properties' link next to the desired form.
- Submissions can be viewed by clicking the 'Submissions' link next to the form.
 - The link will not appear if no submissions have been sent.
 - All those that have been made designated reviewers will have access to submissions.
- Forms can be archived by selecting the desired form, then clicking the 'Archive' button.
 - Archived forms appear under the 'Archived' tab.
 - Archived forms are no longer active, and cannot be edited or shared, but submissions will still be viewable and are able to be exported.
- To restore a form, navigate to the 'Archived' tab, select the form you wish to restore, then click the 'Restore' button (Figure 9).

Figure 9:

Manage Forms [+ CREATE FORM](#)

ACTIVE ARCHIVED

RESTORE

Select	Name	Start Date	End Date	Properties	Share	Submissions
<input type="checkbox"/>	Example Form 2	7/10/2019 3:00 PM	8/10/2019 3:00 PM			
<input type="checkbox"/>	test 2	7/10/2019 2:15 PM	8/10/2019 2:15 PM			
<input type="checkbox"/>	Test 3	7/10/2019 3:00 PM	8/10/2019 3:00 PM			
<input type="checkbox"/>	test form	7/9/2019 5:00 PM	8/9/2019 5:00 PM			
<input type="checkbox"/>	Tips and Travel Sample Waiver Form	1/16/2019 12:00 PM	2/16/2019 1:00 PM			Submissions
<input type="checkbox"/>	Tips and Travel Sample Waiver Form - Copy	1/16/2019 12:00 PM	2/16/2019 1:00 PM			Submissions (1 unapproved)

Submissions

- Once your form has been filled out, the 'Submissions' link will appear in line with the form.

- Click the link to navigate to the 'Submissions' page.
2. Check the box next to each submission you'd like to approve, and click the 'Approve' button (Figure 10).
 - Submissions will be marked as 'Pending' until an Assigned Reviewer approves it.
 - View the submissions by clicking 'View' under the 'Actions' column.

Figure 10:

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Dean Of Students Office

← BACK TO FORMS

Submissions

Example Form

APPROVE EXPORT ALL Filter by Status: Pending

Select	User	Status	Date Completed	Actions
<input checked="" type="checkbox"/>	Delia Sargeant	Pending	7/11/2019 1:17 PM	View

Showing 1 - 1 of 1

3. View approved and denied submissions by selecting the status from the drop-down menu.
4. To view the overall results of the form, select all approved submissions, and click the 'Export All' button.
5. Click on the 'Downloads Page' link that will appear in blue at the top of the page.
 - This can also be accessed by clicking on the grey circle with your first initial in the very top right corner of the screen, and selecting 'Downloads'
6. After a few seconds, the export will appear in your 'My Downloads' page (Figure 11).

Figure 11:

My Downloads

After you request a file from the system and it is has been successfully retrieved, you may download the file below. All requested files remain available until deleted.

DELETE Show All Download Types

Type	Status	Date Requested	Actions
Example Form - Export - Form Submissions	Report Ready	7/11/2019 1:57 PM	Download Delete
Example - Export - Form Submissions	Report Ready	4/9/2019 10:48 AM	Download Delete

Showing 1 - 2 of 2

7. To download the report, click the download icon in line with the desired form.

How to Get Help:

For technical assistance, please contact the Technology Support Center by phone (309) 438-4357, or by email at SupportCenter@ilstu.edu.