

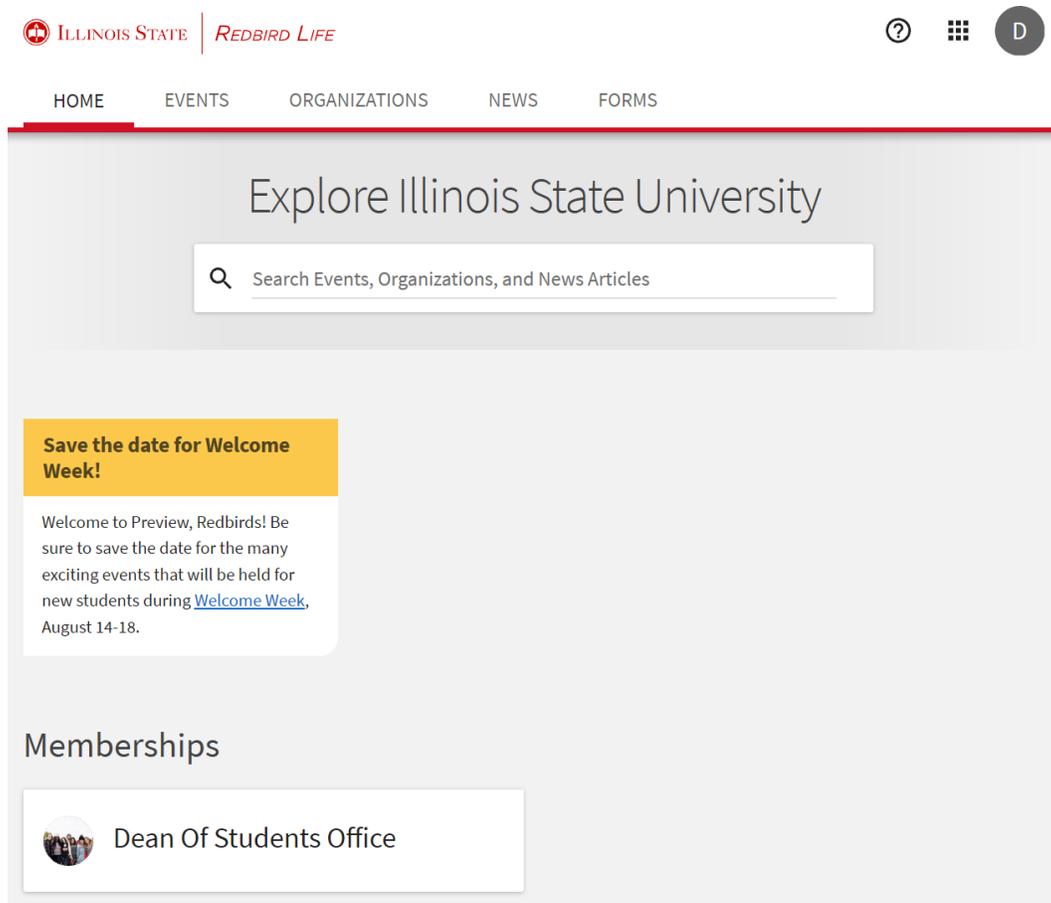
How to Create Forms For my Organization

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.

Before You Begin:

1. Navigate to <https://RedbirdLife.illinoisstate.edu>
2. Click the blue 'Sign in' button in the top right of the page. This action will redirect you to a CentralLogin page.
3. After signing in with your CentralLogin, you will be redirected to your home page in Redbird Life (Figure 1).

Figure 1:

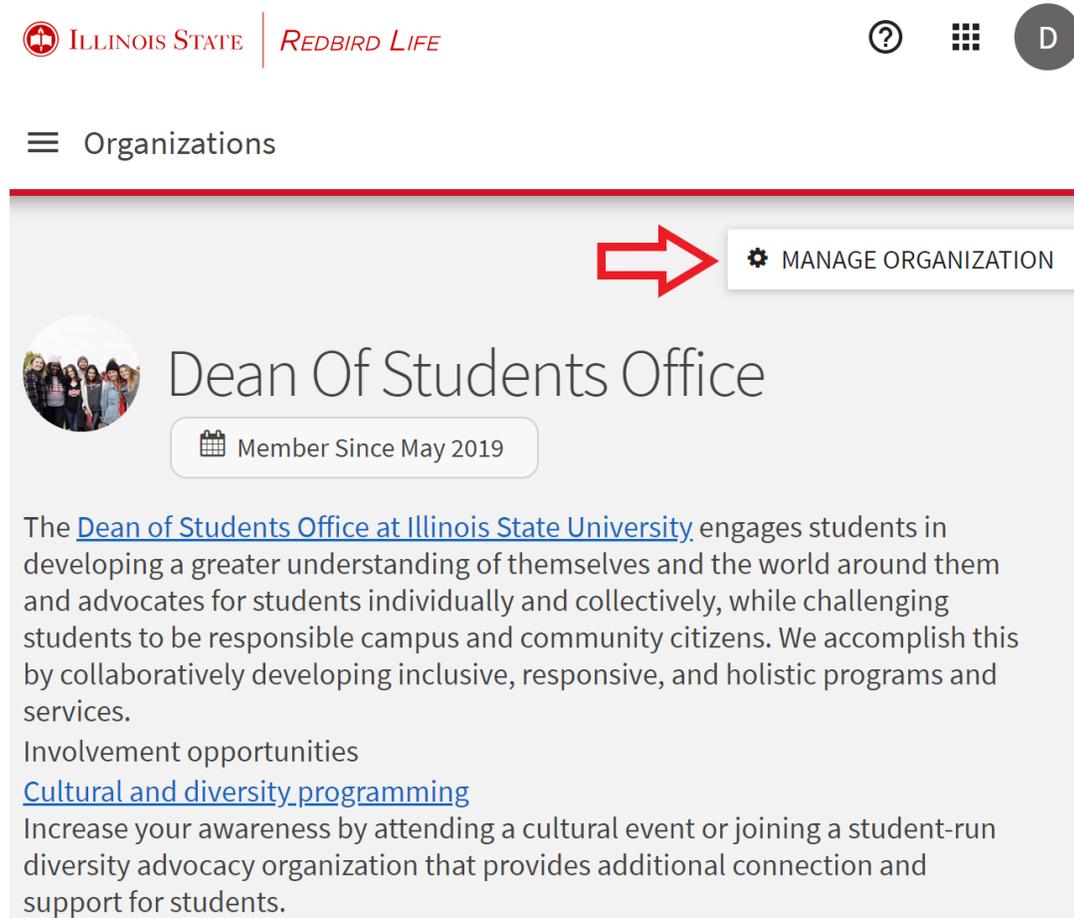


Creating A Form:

1. Select the desired organization from those under the 'Memberships' heading on your homepage, remember you will need to be listed as an officer on the roster of the selected organization in order to create a form.

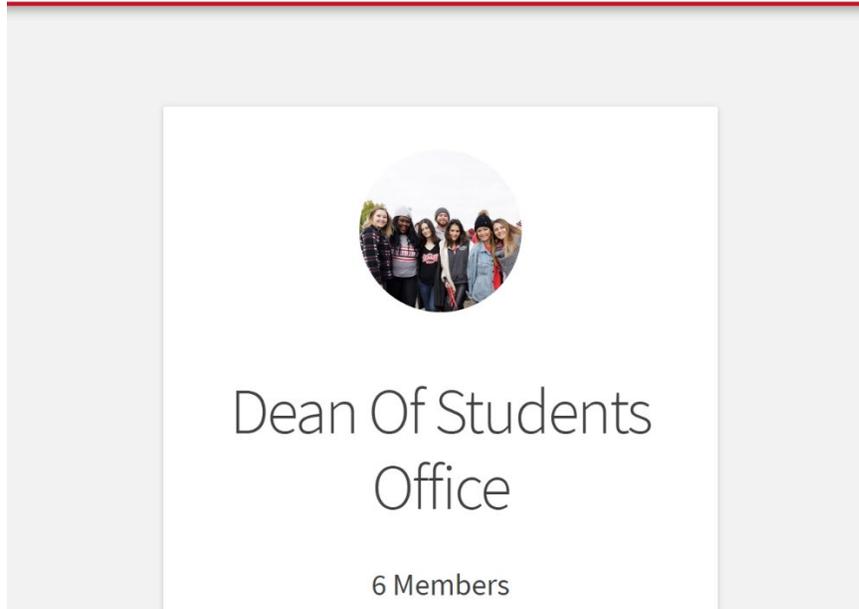
2. Once on the organization's page, select the 'Manage Organization' button in the top right of the page (figure 2). This will open your 'Action Center' as a new page or tab.

Figure 2:



3. In the action center, click the three lined 'options' button in the upper left side of the page (figure 3).

Figure 3:



4. Select the 'Forms' option from the ribbon on the left side of the page.
5. To create a form, select the blue button in the top right corner.
6. 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 4).

Figure 4:

Manage Forms + CREATE FORM

ACTIVE ARCHIVED

ARCHIVE

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	

7. Enter an appropriate name for your form in the 'Name' field (Figure 5).

Figure 5:

The screenshot shows the 'Create Form' interface. At the top right, it says 'Fields with an asterisk (*) are required.' The form has a title field containing 'test 2'. Below the title, there is a 'Status' section with a red box around the 'Active' checkbox. To the right of the status is a yellow 'New' button and two checkboxes: 'Featured in Explore Forms' (unchecked) and 'Hide from Explore Forms' (checked). Below this is a 'Start Time' and 'End Time' section, both with red boxes around them. The start time is 7/10/2019 02:15 PM and the end time is 8/10/2019 02:15 PM. Below the time fields are 'Multiple Submissions' (unchecked) and 'Anonymous Submissions' (unchecked) sections, both with red boxes around them. The 'Anonymous Submissions' section has a red box around the 'Allow Anonymous Submissions From Public Users' checkbox. Below these is a 'Submission Restrictions' section with a light blue background. It contains a paragraph: 'By default, anyone on campus can respond to this form. You can restrict access to specific positions below.' There are two columns of positions. The left column is titled 'The following positions can always respond:' and lists 'Primary Contact', 'DOS Admin', and 'University Department/Unit Liaison', each with a green checkmark. The right column is titled 'Restrict to the following positions:' and has a checkbox for 'All Members of Dean Of Students Office' which is unchecked. At the bottom left is a 'CANCEL' button and at the bottom right are 'SAVE' and 'SAVE AND ADD QUESTIONS' buttons, with the latter highlighted with a red box.

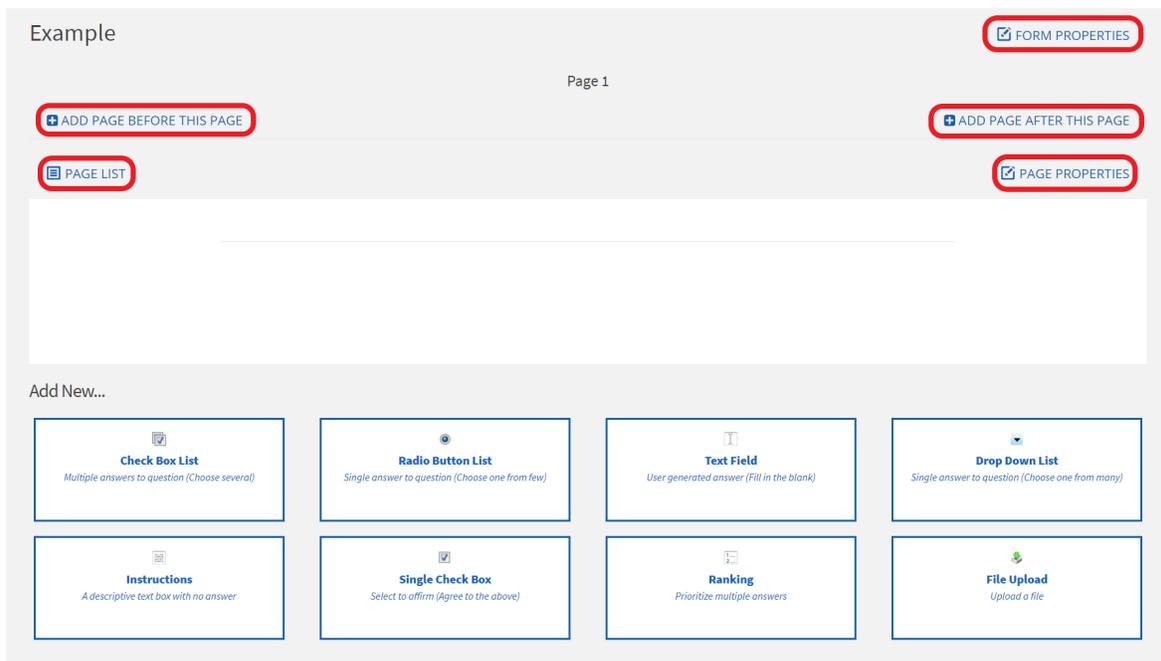
8. Check 'Active' under the 'Status' field to make the form active. This gives form creators the option to build forms with or without it being accessible to others. This box does not need to be checked to continue, but if this is not checked during this stage you will have to go back and check the box later to make it viewable and function correctly.
9. 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.
10. 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.
11. 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.
12. 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.
13. Choose whether you would like to accept multiple submissions from those filling out your form. The default setting is to **not** allow multiple submissions.

14. 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.
15. 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:

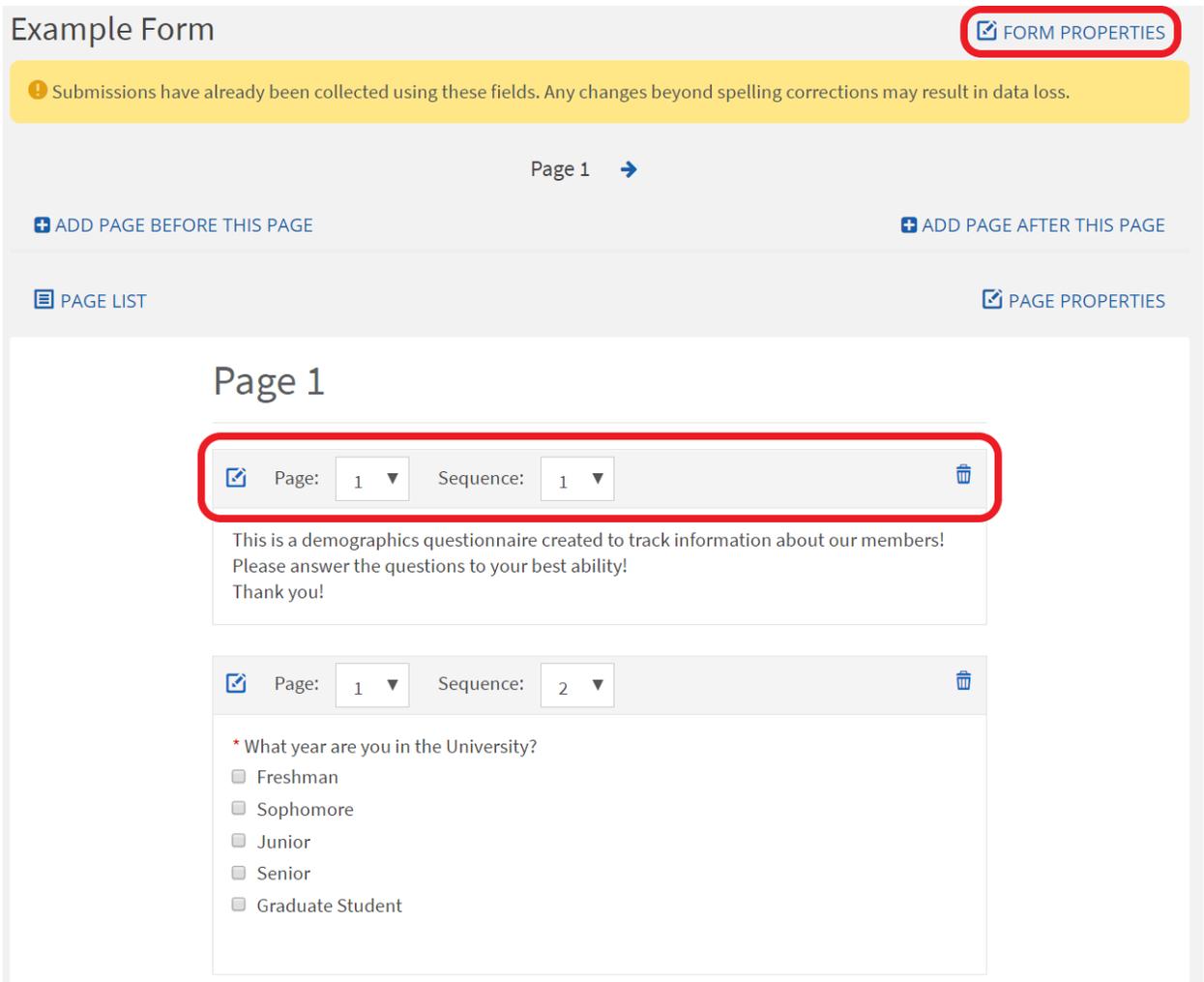
1. Once you've reached the question page, you can Add pages to your form by clicking either the 'Add Page Before This Page' or the 'Add Page After this Page' links (Figure 6).

Figure 6:



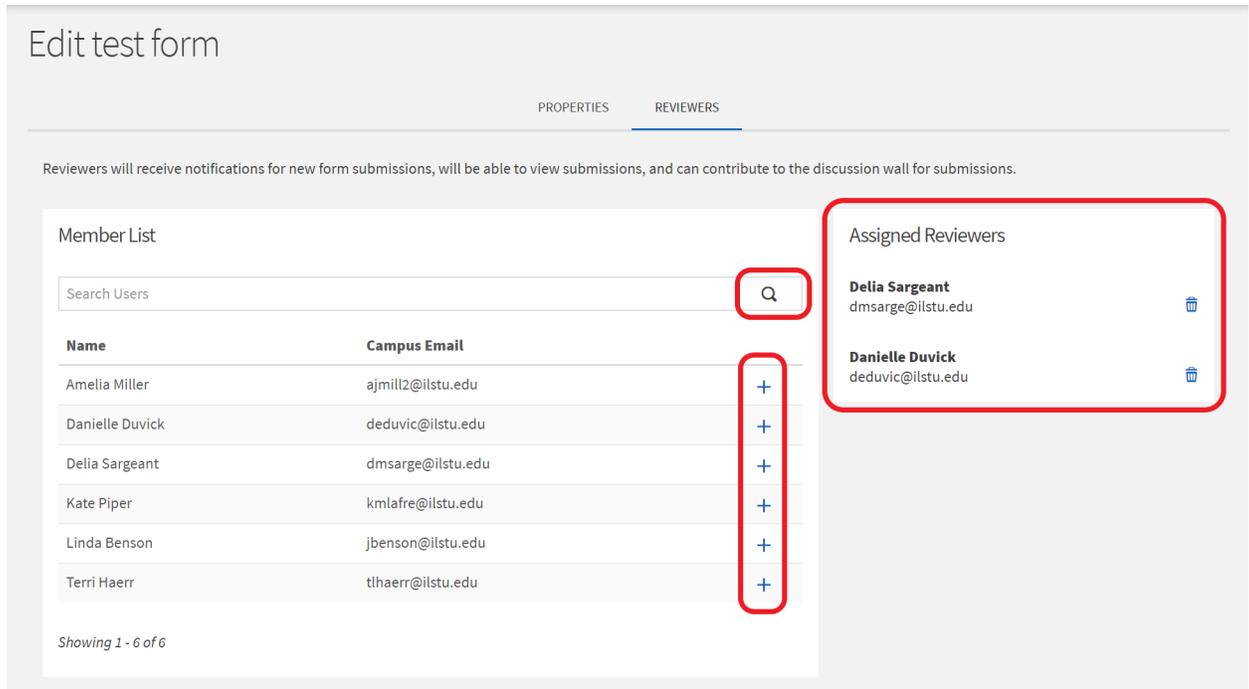
2. Select the 'Page List' button on the left to add more pages to your form, select the page you wish to add questions to, or reorder the pages you have.
 - You can also go to different pages within the form by clicking the arrows to the right and left of the 'Page #' heading.
3. Clicking on the 'Page 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 7).

Figure 7:



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 7).
7. To adjust any settings, click the 'Form Properties' link near the top of the page (refer to Figure 7).
8. To select your designated reviewers, click the 'Reviewers' tab on the top of the page, next to the 'Properties' tab (Figure 8).
 - 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 8:



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 9).
 - You can also copy the form by clicking the 'Copy' link.

Figure 9:

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

3. To edit any settings of a form, click the 'properties' link next to the desired form.
4. 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.
5. 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.
6. To restore a form, navigate to the 'Archived' tab, select the form you wish to restore, then click the 'Restore' button (Figure 10).

Figure 10:

Manage Forms

[+ CREATE FORM](#)

ACTIVE ARCHIVED

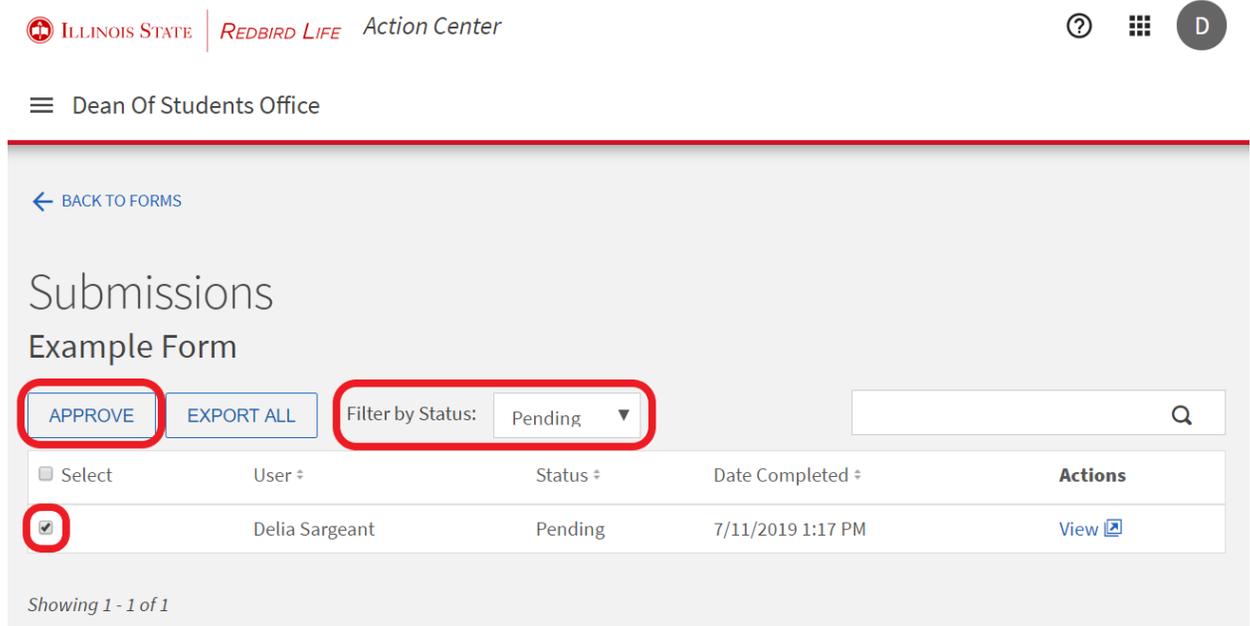
RESTORE

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

1. 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 11).
 - Submissions will be marked as 'Pending' until an Assigned Reviewer approves it.
 - View the submissions by clicking 'View' under the 'Actions' column.

Figure 11:



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 12).

Figure 12:

My Downloads

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

Show

<input type="checkbox"/> Type	Status	Date Requested ▾	Actions
<input type="checkbox"/> Example Form - Export - Form Submissions	Report Ready	7/11/2019 1:57 PM	↓ 🗑
<input type="checkbox"/> Example - Export - Form Submissions	Report Ready	4/9/2019 10:48 AM	↓ 🗑

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.