

Engage Guides:

Managing Your Forms



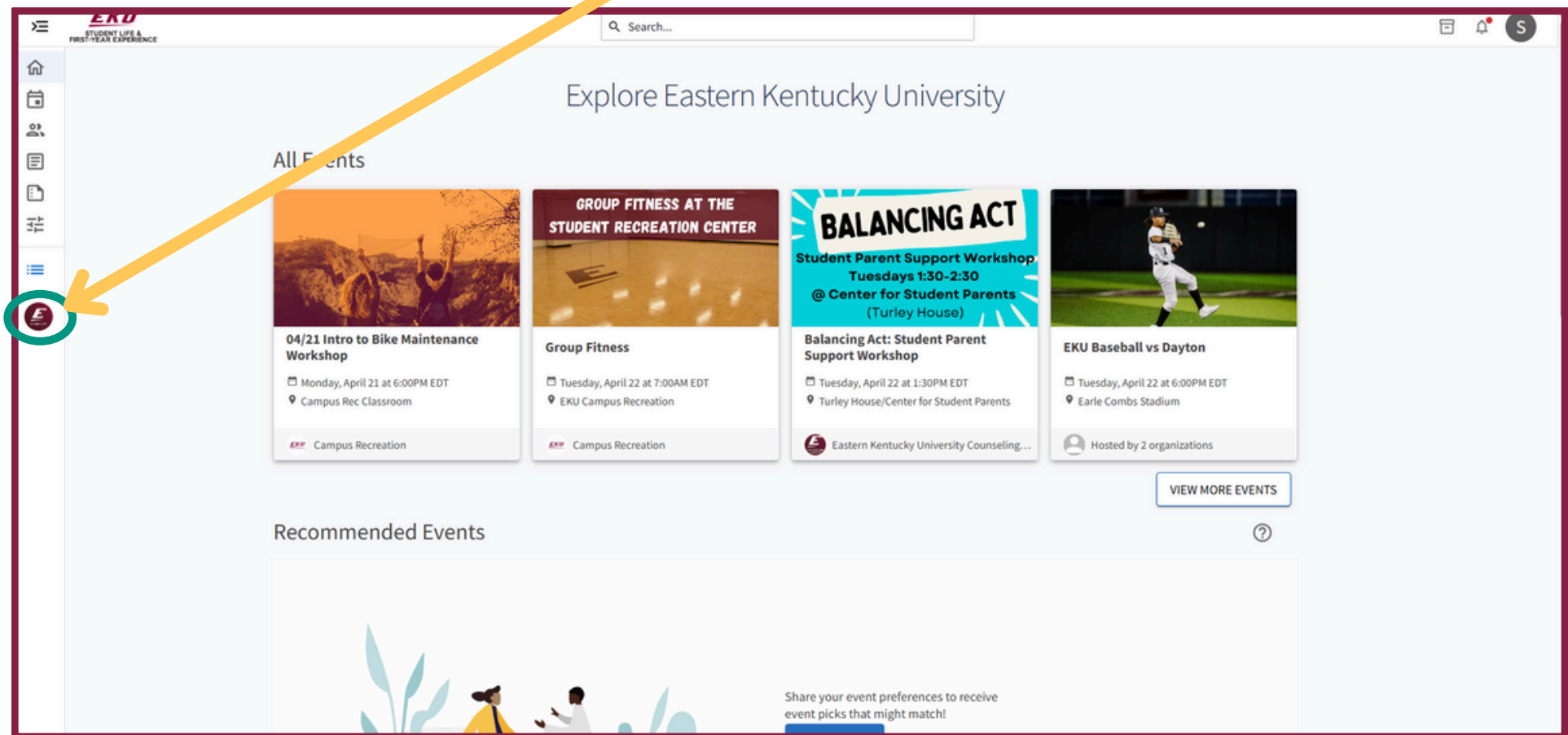
Student Life & First-Year Experience

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Step 1:

Find the organization you wish to manage from the left-side menu on your screen.



Step 2:

Click your org's icon to open the management tab for your organization.

Manage Home

ORGANIZATION TOOLS

- About
- Roster
- Events
- News
- Gallery
- Documents
- Forms
- Elections

Explore Eastern Kentucky University

All Events

- 04/21 Intro to Bike Maintenance Workshop**
Monday, April 21 at 6:00PM EDT
Campus Rec Classroom
Campus Recreation
- GROUP FITNESS AT THE STUDENT RECREATION CENTER**
Group Fitness
Tuesday, April 22 at 7:00AM EDT
EKU Campus Recreation
Campus Recreation
- BALANCING ACT**
Student Parent Support Workshop
Tuesdays 1:30-2:30
@ Center for Student Parents (Turley House)
Tuesday, April 22 at 1:30PM EDT
Turley House/Center for Student Parents
Eastern Kentucky University Counseling...
- EKU Baseball vs Dayton**
Tuesday, April 22 at 6:00PM EDT
Earle Combs Stadium
Hosted by 2 organizations

[VIEW MORE EVENTS](#)

Recommended Events

Share your event preferences to receive event picks that might match!

Step 3:

Click the "Forms" button in the management tab.

The screenshot shows the EKU Student Life & First-Year Experience website. The left sidebar menu is open, and the 'Forms' option is highlighted with a green circle and an orange arrow. The main content area displays 'All Events' with four event cards. Below this is a 'Recommended Events' section with a placeholder image and a prompt to share event preferences.

Manage Home

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Recommended Events

Share your event preferences to receive event picks that might match!

Manage Forms Home Page:

This is where all of your organization's forms are displayed and managed.

The screenshot shows the 'Manage Forms' interface. On the left, a sidebar contains a search bar, a 'Sort By' dropdown set to 'Form Name', a 'Status' section with an 'Include Archived Forms' toggle, and a 'Filters' section with checkboxes for 'Accepting Submissions', 'Has Pending Submissions', and 'Featured'. The main area displays a list of forms, including '2025 Greek Assessment and Awards Application', '2025 Student Excellence Awards Nominations', 'Boo Bash 2024 - RSO Trick or Treat Registration', and 'Boo Bash Registration 2023'. Each form entry shows its start and end dates and submission statistics. A 'New!' banner at the top right states 'Forms now have the option to require organization representation.' with a 'FEEDBACK' link. Annotations with arrows point to various features: the search and filter sidebar, the three-dot menu on a form entry, the 'Create Form', 'Bulk Archive', and 'Bulk Restore' buttons, and a detailed view of the three-dot menu options like 'Edit Form Questions', 'Archive', 'Copy', 'Share', 'Submissions', 'Export as Excel', and 'Export as PDF'.

Clicking the 3 dots next to an existing form will open its management menu.

Forms can be found using the search function or by using the filters provided.

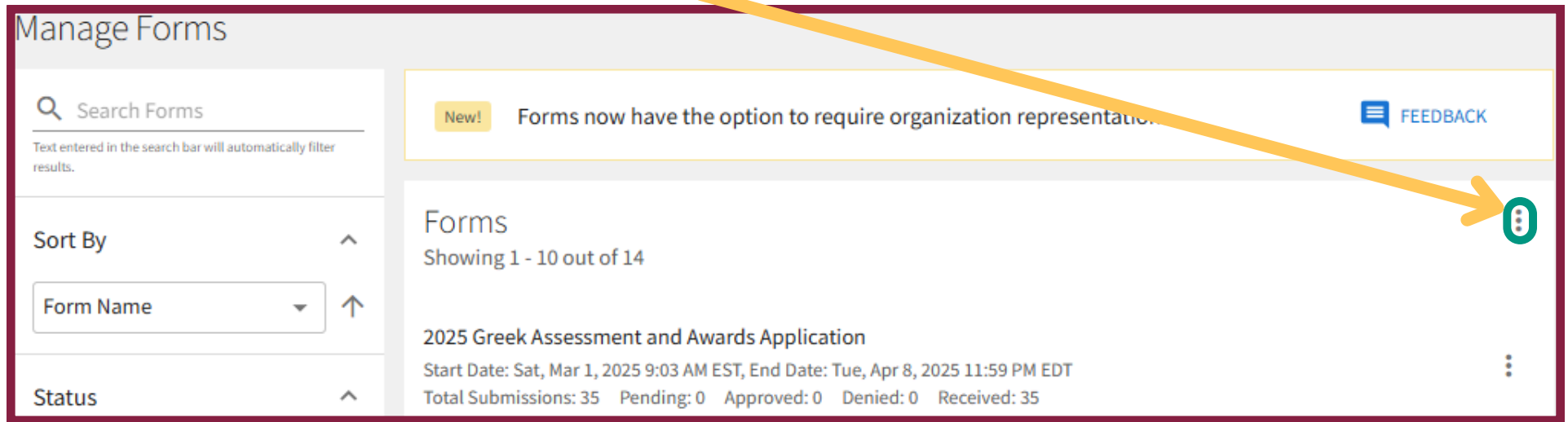
Clicking the 3 dots at the top opens the form management menu.

The "+ Create Form" button will generate a new form.

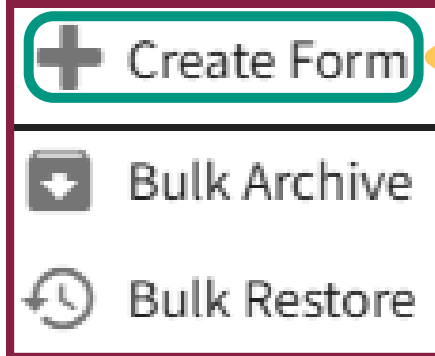
Use the "Bulk Archive/Restore" functions to hide/recover your forms.

Creating a Form:

From the Manage Forms Home Page, click the 3 dots at the top to open the form management menu.



The screenshot shows the 'Manage Forms' interface. On the left, there is a sidebar with a search bar, a 'Sort By' dropdown menu, and a 'Status' filter. The main content area has a header with a 'New!' badge and a notification about organization representation, followed by a 'FEEDBACK' button. Below this, the 'Forms' section shows 'Showing 1 - 10 out of 14'. A table lists forms, with the first one being '2025 Greek Assessment and Awards Application'. An orange arrow points from the top of the page to a three-dot menu icon in the top right corner of the forms list.



A close-up of the form management menu, which is a dropdown list. The first item is '+ Create Form', which is highlighted with a green border. Below it are 'Bulk Archive' and 'Bulk Restore'.

To start designing your new form, click the "+ Create Form" button.

Creating a Form - Form Properties:

To start constructing the form, you have to name it first.

Form Properties

Add Form Name and save settings to reveal all form options.

Settings Unsaved Changes SAVE

Form Name

Train

Form Name must not be left blank.

Form Status

DISABLED

Enabling this option makes this form available for use within the dates and times specified below. Please Note: Users can still submit past the end date if they begin the form during the active window.

i This form is not currently accepting submissions.

- Form Status is Disabled.

Active From 05/21/2025 03:32 PM

Active Until 06/21/2025 03:32 PM

After naming the form, you can either click the “Save” button to begin formatting the questions or continue to set properties for the form.

Creating a Form - Form Properties (2):

The "Form Status" section controls when the form is actively accepting submissions.

Form Status

DISABLED

Enabling this option makes this form available for use within the dates and times specified below. Please Note: Users can still submit past the end date if they begin the form during the active window.

This form is not currently accepting submissions.

- Form Status is Disabled.

Active From: 05/21/2025 03:32 PM

Active Until: 05/21/2025 03:32 PM

The form can be easily turned on/off using this toggle switch.

Set the specific time and date range you would like the form to accept submissions using the dropdown calendar.

May 2025

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Clear Today

04 32 PM

05 33 AM

06 34

07 35

08 36

09 37

10 38

11 39

Creating a Form - Form Properties (3):

The screenshot shows the 'Include in Explore Forms List' property. It has a title 'Include in Explore Forms List' and a description 'When enabled this form is listed on your community's public forms list.' Below this is a section titled '★ Feature in Explore Forms List' with a description 'Enabling this option places this form to the top of your community's public form list for better visibility.' To the right of this section is a toggle switch labeled 'DISABLED'.

If this function is "Enabled" the form will display at the top of your organization's public profile.

If this function is "Enabled" the form will display on your organization's public profile.

The screenshot shows the 'Require Submissions on behalf of an Organization' property. It has a title 'Require Submissions on behalf of an Organization' and a warning message: 'Warning: This setting can not be turned off once organization representation has been enabled.' Below this is a description: 'If Organization Representation is enabled for this form, Users will be prompted to select the organization they are submitting a response on behalf of. The User must hold an Officer position within the organization to submit a response. This feature is only available for new Forms created after January 21, 2025. Copies of Forms originally created prior to January 21, 2025 are not able to use this feature.' To the right is a toggle switch labeled 'DISABLED'.

Below this is the 'Allow Submissions From Public Users' property. It has a title 'Allow Submissions From Public Users' and a description: 'When enabled anyone can create a submission without being logged in. Please Note: Enabling this option automatically enables Allow Multiple Submissions.' To the right is a toggle switch labeled 'DISABLED'.

Below this is the 'Require Name and Email on Public Submissions' property. It has a title 'Require Name and Email on Public Submissions' and a description: 'This option is automatically enabled when allowing submissions from public users.' To the right is a toggle switch labeled 'DISABLED'.

Below this is the 'Allow Multiple Submissions' property. It has a title 'Allow Multiple Submissions' and a description: 'This option is automatically enabled when allowing submissions from public users.' To the right is a toggle switch labeled 'DISABLED'.

If this function is "Enabled" the form requires an officer of an organization to submit the response, this disables public submissions.

If this function is "Enabled" the form will collect responses from anyone, this disables organizational representation for submissions.

If public submissions are being collected, this function requires a name and email for the submitter when "Enabled."

This function allows multiple responses to be submitted when "Enabled."

Creating a Form - Form Properties (4):

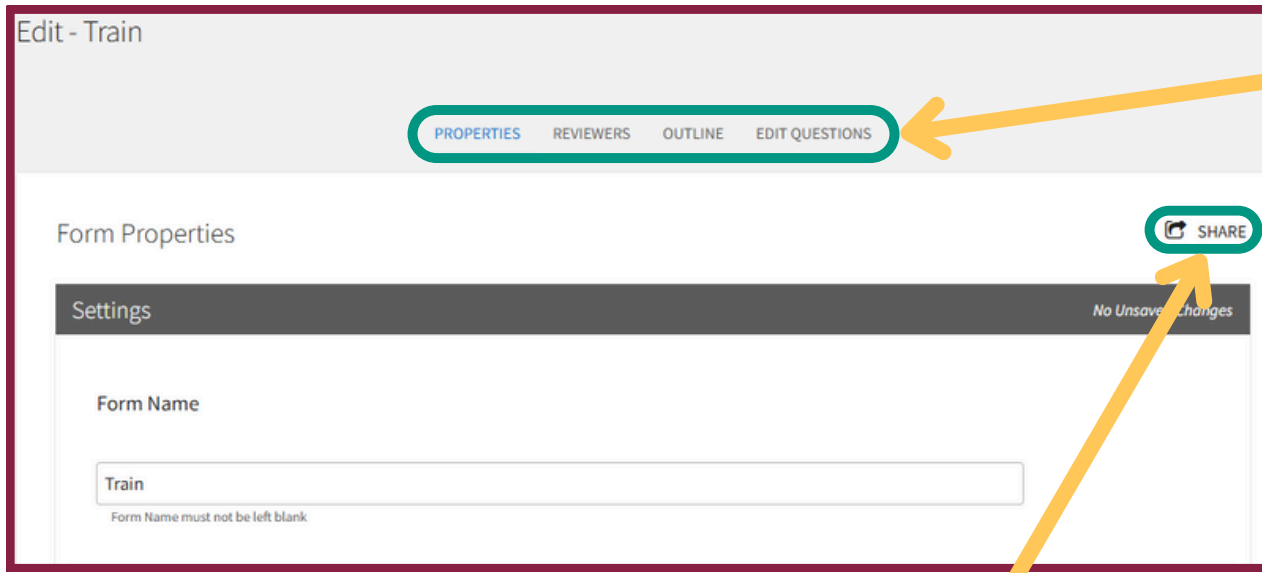
The screenshot displays the 'Form Properties' configuration interface. It includes several toggle switches and a text input field, each with an explanatory annotation:

- Require Review and Approval Process:** A toggle switch currently set to 'DISABLED'. An annotation states: 'If this function is "Enabled" the form requires a reviewal process to approve/deny submissions.'
- Reviewer Workflow Steps:** A toggle switch currently set to 'DISABLED'. An annotation states: 'If this function is "Enabled" submissions are assessed by reviewers in a particular order.'
- Submitter Identified Reviewers:** A toggle switch currently set to 'ENABLED'. An annotation states: 'If this function is "Enabled" submitters can provide up to 5 emails for the people they identify as a reviewer for their form submission.'
- Require at Least One Submitter Identified Reviewer Per Submission:** A toggle switch currently set to 'DISABLED'. An annotation states: 'If this function is "Enabled" submitters are required to provide at least 1 email for the people they identify as a reviewer for their form submission.'
- Instructions (optional):** A text input field with a placeholder: 'Enter descriptive text to tell your submitters whose email address(es) to enter as Submitter Identified Reviewers. "Enter the email of your Academic Advisor"'. An annotation states: 'If you are allowing submitters to identify their own reviewer, you can add instructions for the emails they should enter here.'

At the bottom of the interface, there is a blue bar containing the text 'Unsaved Changes' and a green 'SAVE' button. An annotation points to the 'SAVE' button, stating: 'When you are done setting the form properties, click the "Save" button at the top of the page to begin formatting the questions.'

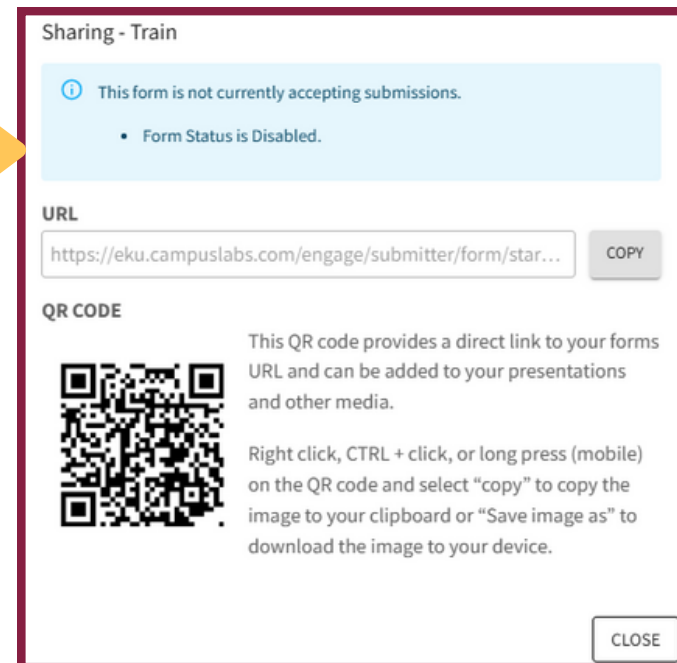
Editing a Form:

After saving a form's properties, you will be able to begin formatting the questions and layout.



These tabs allow you to manage different aspects of the form.

Clicking the "Share" button opens the URL and QR Code for distributing to people so they can submit a response.



Editing a Form - Reviewers:

Clicking the "Reviewers" tab will take you to the form's Reviewer Management Page.

The image shows two screenshots from a software interface. The top screenshot is the 'Reviewers' tab of a form's management page. It has tabs for 'PROPERTIES', 'REVIEWERS' (which is selected and highlighted with a green circle), 'OUTLINE', and 'EDIT QUESTIONS'. Below the tabs, there's a text block explaining reviewer notifications. On the left, there's a 'Search Reviewers' box with a search icon and a text input field. Below that is a 'Reviewer Status' section with three radio buttons: 'All Reviewers' (selected), 'Voting Reviewers', and 'Non-Voting Reviewers'. The main area shows a list of 2 reviewers, 'Showing 1-2 of 2'. Each reviewer entry has a circular icon with a letter (C or S), a name (redacted), and the text 'Voting Reviewer Level 1'. To the right of each entry is a trash can icon. The bottom screenshot is the 'Edit Reviewer' dialog. It has a header 'Edit Reviewer' and a blue bar with a circular icon and a name (redacted). Below this is a toggle switch labeled 'Allow [redacted] to vote on submissions', which is currently turned on. At the bottom is a section titled 'Reviewer Workflow Settings' with a dropdown menu labeled 'Select a Level' showing 'Level 1 (Current)'. Below the dropdown is a text block explaining the notification process for Level 1. At the bottom right are 'CANCEL' and 'SAVE' buttons.

To add a reviewer for the form, click the blue person button.

To remove a reviewer, click the trash can next to their name.

Use the search and filter functions to find reviewers faster.

To edit a reviewer, click their name.

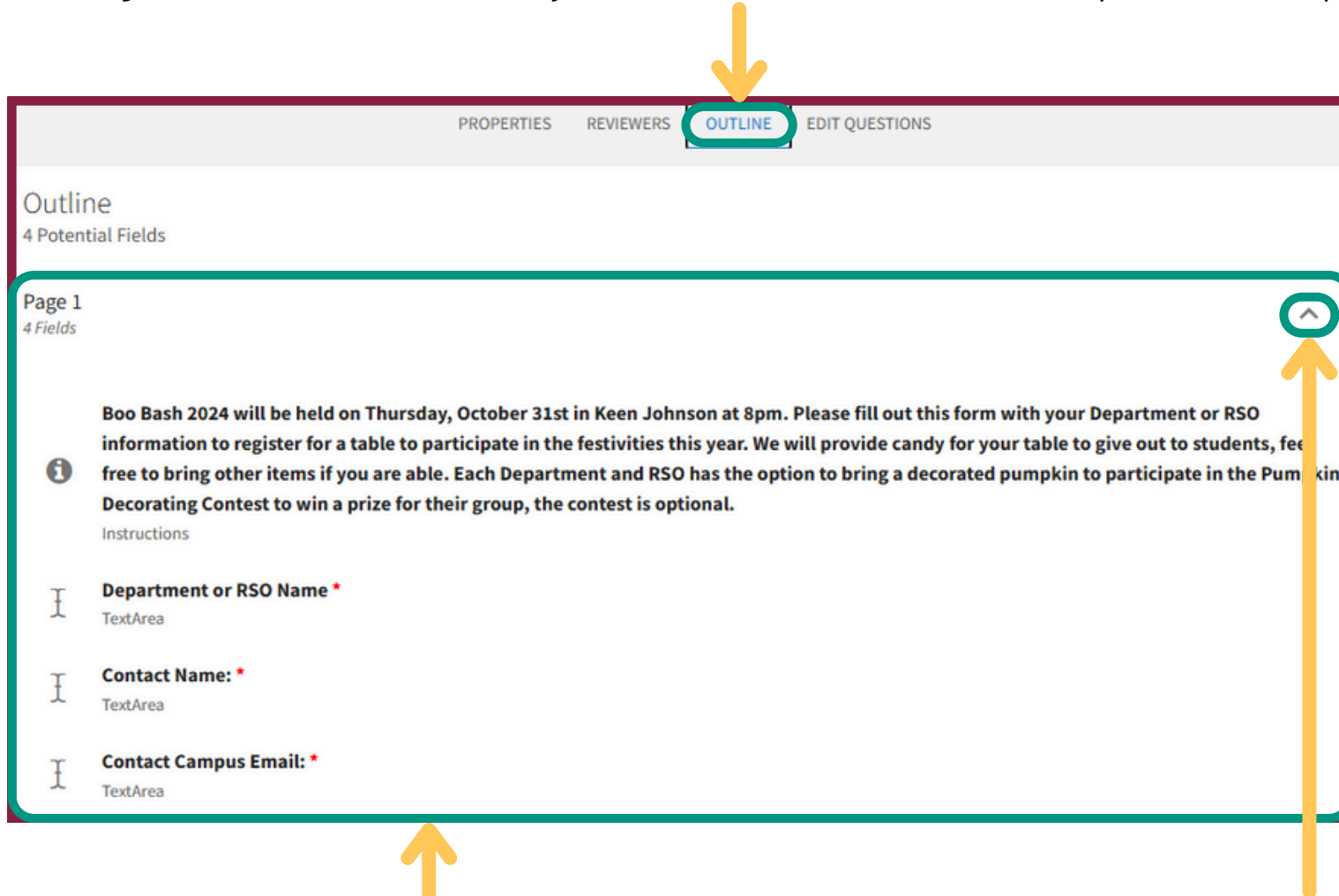
If you are requiring a review process, added reviewers can be classified as a voter.

If you enabled the Reviewer Workflow Steps, you can change the reviewers level when reviewing submissions.

*If you are not requiring a review process, all added reviewers will be classified as non-voters.

Editing a Form - Outline:

Clicking the "Outline" tab will take you to the overview of the form's questions and pages.



The screenshot shows the 'Outline' tab selected in a form editor. The top navigation bar includes 'PROPERTIES', 'REVIEWERS', 'OUTLINE' (highlighted with a green border and a yellow arrow pointing to it), and 'EDIT QUESTIONS'. Below the navigation bar, the 'Outline' section is titled 'Outline' with '4 Potential Fields' underneath. The main content area is titled 'Page 1' with '4 Fields' underneath. It contains a text block with an information icon and a paragraph of text about the 'Boo Bash 2024'. Below the text block are three text area fields: 'Department or RSO Name *', 'Contact Name: *', and 'Contact Campus Email: *'. A yellow arrow points to the bottom of the form. Another yellow arrow points to a small upward-pointing arrow icon in the top right corner of the form area, which is used to minimize sections.

The Outline function makes it easier to review your form to make sure all of your content is correct.

If you have multiple pages, you can minimize each section by clicking the arrow to the right.

Editing a Form - Editing Questions:

Clicking the “Edit Questions” tab will take you the question management page for the form.

The screenshot shows the 'Edit - Train' interface. At the top, there's a 'Page 1' indicator. Below it, a toolbar contains buttons for 'ADD PAGE BEFORE THIS PAGE', 'ADD PAGE AFTER THIS PAGE', 'PAGE LIST', and 'PAGE PROPERTIES'. The 'PAGE LIST' button is highlighted with a green border and an orange arrow pointing to it from the bottom left. The 'PAGE PROPERTIES' button is also highlighted with a green border and an orange arrow pointing to it from the right. Below the toolbar, there's a grid of question types: 'Check Box List', 'Radio Button List', 'Text Field', 'Drop Down List', 'Instructions', 'Single Check Box', 'Ranking', and 'File Upload'. An orange arrow points from the bottom center to this grid. On the right side, there are three text annotations with orange arrows pointing to the 'FORM PROPERTIES', 'PAGE PROPERTIES', and 'PAGE LIST' buttons respectively.

Clicking the “Form Properties” button will take you back to that form’s management page.

To create multiple pages, use the “add page” button.

“Page Properties” lets you name the page and/or add conditional formatting.

The “Page List” button provides an overview of the pages in the form.

To add a question to your form, choose your desired format from the options provided.

Have Questions? Need More Help?

Feel free to give us a call or send us an email!

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Student Life & First-Year Experience