

How to Create a Form

- Log onto [CU Involved](#)
- Go to your organization's CU Involved page
- Click on *Manage Organization* on the upper right side of page
- Click on the three black bars on the upper left side of the page
- Click on *Forms*
- Click Create Form at the top of the page.
- When creating a form, you will first be prompted to identify your form properties. Enter a name for your form and then fill out the additional settings. See below for an explanation of each setting.

Setting	Function
Active	Determine if the form should be accessible yet. If the active option is not chosen, then users will not be able to complete the form. Leaving "Active" unchecked allows you to work on a form before making it live to your users.
Start/end time	The time period for which the form should be open. Submissions will only be accepted during this time period.
Allow multiple submissions	Users can submit more than one submission. If this option is not selected, users will be restricted from the form after one submission.
Submission restrictions	Determine if you want to restrict the form to certain users. If you're creating this form at the administrative level, you have the option to restrict the form to primary contacts in specific organization types. If you create this form in an organization, you can restrict the form to users within your organization that hold a specific position. If you want to make your form available to any user in your community, do not select any submission restrictions.

After you determine the settings for your form, you'll be taken to the form builder and you will land on the first page of your form. At any time, you can jump back into the settings by clicking Form Properties in the top right of the page. In addition, you can jump to additional pages of the form by clicking Page List in the top left. To name the page, click Page Properties in the top right. The name of each page will be visible to users filling out the form.



When you're ready to start adding questions into the form, take a look at the list of question types that are available to you. Each of these question types serve a unique purpose. See below for a complete explanation of each.

Question type	Function
Check box list	Multiple choice question that allows users to choose more than one option.
Radio button list	Multiple choice question that only allows users to select one option.
Text field	Open text response. Alter the number of rows to provide the user a larger space to write in for longer answers. You can also use the Text Field question to utilize validation, ensuring a specific format is entered.
Drop down list	Multiple choice question where users can only choose one option. The only difference between the Drop Down and Radio Button options is that the user has to click the dropdown to view the available choices.
Instructions	This is your method of providing additional instructions or information to the user. Instructions do not require any action on the part of the user.
Single check box	Think of this as a method to provide the user a set of terms and conditions that they need to agree to before they can proceed on the form. You can input the terms that need to be agreed upon and the user will be provided a single check box to confirm their agreement.
Ranking	Provide the user multiple answer choices for them to rank. You can also determine the maximum number of items they need to rank.
File upload	Allow the user to upload a file from their computer. Files must be under 4 MB and the uploader accepts most file types. If you prefer a specific file type, make sure to indicate this within the instructions of the question.

For each of the question types, you also have additional question options. Once you have created a question, click on the blue *Edit* icon within the question to view its additional options.

Potential options and their descriptions are below.

Question setting	Function
Required	Select the "Required" box if you want the question to be mandatory for users before proceeding. This option is available for all question types.
Shuffle answers	For Check Box List and Radio Button List question types, you can choose to shuffle your answers. For example, if you input an alphabetical list but want the answer choices to appear random, you can shuffle them. Note: This will not shuffle the answers every time a different user fills out the form.
Minimum and maximum answers	If you are utilizing the Check Box List, you can identify the minimum or maximum number of answers a user can select.

You also have the ability to put additional properties on your answer choices for Check Box List, Radio Buttons and Ranking question types.



Question setting

Function

Include text area	Text Area allows you to provide additional space for users to write in an answer. For example, you may want to include an "Other" option to a multiple choice question but want users to write in their additional option.
Include tooltip	The Tooltip allows you to hover over the answer choice to read additional information about it. The additional information will appear automatically next to the answer choice.
Include additional text	Similar to the Tooltip, Additional Text allows you to put in additional information about an answer choice. The difference between the two is in how the information appears. With Additional Text, an information icon appears next to the answer choice. Clicking that icon will open up a box with the additional information.

After creating the form and configuring the settings, you're ready to publish. Navigate back to your full list of forms. To the right of your form you will see the *Publish* option. Make sure your form is Active and copy the URL provided in the text box. You'll need to click *Publish Form* if you changed the status. Next, distribute the form link to whomever should complete it.