CampusGroups

User Group Meeting #3
Surveys & Forms

Meeting Summary

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1. Basics of Surveys & Forms

When you click "Create" on the Surveys drop-down menu, you'll see 5 options. All of the options share the same basic functionality, but each one is tailored for specific uses.

- *Form* – Just like paper forms that most of us are used to filling out by hand, the *Form* option allows you to create a series of questions with either open response fields or multiple-choice selections. The result is a compact e-document, ideal for collecting information from individuals.
- *Survey* – This option is similar to *Forms* but formatted differently to allow for larger text in the question fields, which is better suited for the kinds of questions you're likely to ask in a survey compared to a form (e.g. "What do you think of XYZ?" vs. "Name," "Address"). *Surveys* also allow you to aggregate responses and analyze results for a whole group.
- *Poll* – Select this option when you want to see responses to a single question.
- *Election* – This option is useful for encouraging voting in group elections. Define the available positions and automatically see "Vote" as the call-to-action.
- *Quiz* - Create questions and set correct answers, then score results with points. You can establish a "Pass" threshold to see which users have passed the Quiz.

Click "View Surveys & Forms" to view, edit, manage, and share your Surveys & Forms.

- Use the filters at the top to sort by the type of Survey — *Form, Poll, Quiz,* etc. — or use the search bar to quickly find what you're looking for.
- The drop-down menu next to each of your Surveys & Forms gives you a menu of essential functions: Restrict access, copy a shortened link, send your survey by email, duplicate your survey, and more.
- Your Surveys & Forms are also accessible when building an email. Scroll to the bottom of the email creation window to see a list of your available Surveys & Forms — simply check the box next to the items you'd like to include, and they'll be embedded directly into your email.

Click on one of your Surveys & Forms to view results and process approvals.

- When you click on one of the Surveys & Forms in your archive, you'll see a box of Preview Answers for each response, as well as a field to Approve the submission. This can be useful for creating approval processes (more on this below).
- To view the results of your Survey in more detail, click the "Generate Report" button in the upper right of your screen to download a .CSV file of all form responses.
- To customize the results you want to view, click "Preview Answers" and select the fields you want to display on screen.
- You can also assign tags to Surveys and responses that can be reused later for searching and filtering.

2. Top Use-Cases for Surveys & Forms

Use Surveys & Forms to engage with groups and manage approval processes.

- One of the simplest applications for Surveys & Forms is to gather feedback from group members. When you create your Survey, you can make some questions mandatory, while restricting others to only be visible by administrators.
- Surveys & Forms are mobile-friendly, so users can easily submit responses on-the-go.
- After a user responds to a Survey, they're taken to a Confirmation page, which can be customized to display whatever message you choose.
- When you click on a Survey and view a preview of responses, you can use the "Approve," "Reject," and "On Hold" functions to manage approval processes. For instance, you can use a Survey for room reservations, reimbursement requests, or newsletter submissions, then simply "Approve" or "Reject" from the Survey results page.
- When you "Approve" or "Reject" a submission, you can also write a custom message to the submitter, who will receive a notification.

Surveys & Forms are powerful tools for events: Sign-ups and follow-ups.

- When you create an event, you'll see options to add a series of questions as part of your event's registration process. Create custom questions or use the check-boxes to add selections from the standard questions available. *Please note: Event registration questions will not appear in your Surveys & Forms tab, as they are tied to the event. The data you collect will be held within the Event module.*
- You'll also see an option at the bottom of the event creation page to automatically send a follow-up survey after your event has finished (e.g. to gather feedback about the event). You can choose any of your available Surveys & Forms to automatically send to your event's attendees.
- To manually send Surveys to your event registrants, simply select your desired email recipients from the event's list of registrants and click the "Email Attendees" button. You'll be taken to the email creation screen, where you can embed Surveys directly into your email.

You can adjust settings for which users can edit Surveys or process approvals.

- Administrators can access permission settings to restrict or allow others to edit Surveys & Forms or use the approval buttons to "Approve" or "Reject" submissions.
- For more detailed control over which users have access to different privileges, use Workflows and create separate Workflow Groups (more on that below).

3. Automating Processes with Workflows

Workflows are useful for creating approval steps and assigning different levels of authority to different groups of administrators.

- Click on “Workflows” from the Surveys drop-down menu to create a Workflow. You’ll be able to define the steps required for approval, as well as how you want to Transition from one step to the next.
- In order to activate your Workflow, you’ll need to assign a Workflow Group to each step. This is the group that has authority to approve completion of the Workflow step according to the Transition settings you choose. When you click on “Workflows” from the Surveys drop-down menu, you’ll see a button in the upper right for “Workflow Groups” that will allow you to create your groups.

There are currently 3 Smart Workflows integrated into CampusGroups that can be used to automatically trigger other actions on your school’s platform.

- *Event Approval* – Automatically send an event proposal through the proper steps to get it approved, including multiple approval stages as needed. Once approved, the event is automatically added to your school’s calendar.
- *New Group Registration* – Make it easy for students who want to start new organizations on campus by creating a streamlined request process. Once their request is approved, the new group is automatically created on your school’s CampusGroups platform.
- *Group Re-Registration* – Administrators can set the status of student groups as “Requires Re-Registration,” prompting them to enter this Workflow. This can be useful at the end of the year when you want groups to re-register for the following year. Once a group has completed the approval Workflow, its status is automatically updated on the administrator’s side.

Administrators can check the status of a Workflow, but only for the steps over which they have authority.

- Use the “See Workflow” button to view a Workflow and check which step a request has reached in the approval process.
- You can only view the status of a Workflow step if you are in the Workflow Group that applies to that step.

For a detailed overview on creating Workflows with Surveys & Forms, please see this article in our Support Center.