



Jive Interactive Intranet

Cloud Administrator Guide

Jive Extensions: Forms and Surveys Add-on

Notices

For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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For information about purchasing an upgrade or professional services, contact your account executive. If you do not know who your account executive is, or for other queries, contact us through our [website](#).

1

Forms and Surveys App add-on

The Forms and Surveys App allows users to create, edit, and publish forms and analyze form results. The form data resides in the middleware server and can be exported in different formats. Users can choose to publish the results of the form as a document in Jive.

For details, see the following topics:

- [Installing Forms and Surveys Add-on](#)
- [Configuring Forms and Surveys Add-on](#)
- [Creating and editing forms with the Forms and Surveys App](#)
- [Submitting a form using the Forms and Surveys App](#)
- [Functional Overview](#)

Installing Forms and Surveys Add-on

Open a support with the Support to install this add-on.

Configuring Forms and Surveys Add-on

Forms and Surveys Add-on is an add-on that uses user groups for determining access.

Fastpath: Admin Console > Permissions > User Groups

Fastpath: Advanced Admin Console > People > Management > Create User Group

Fastpath: User interface: Your avatar > Add-ons

A user must have at least Manage System permissions to configure add-ons.

Configuring user groups for Forms and Surveys App

The Forms and Surveys App add-on uses two user groups to provide secure access to the add-on features.

Fastpath: **Admin Console > Permissions > User Groups**

Fastpath: **Advanced Admin Console > People > Management > Create User Group**

To configure user groups for the Forms and Surveys App add-on:

1. Go to the user group configuration page:
 - **Admin Console > Permissions > User Groups**
 - **Advanced Admin Console > People > Management > Create User Group**
2. Create user groups for the Forms and Surveys Add-on:
 - `forms-surveys-admins`: Members are administrators and authors of Forms and Surveys App.
 - `forms-surveys-authors`: Members are authors of Forms and Surveys App.

Applying user groups to Forms and Surveys App

Add the preconfigured user group (or groups) to the Forms and Surveys Add-on configuration to allow users of this group to use the add-on.

Fastpath: **User interface: Your avatar > Add-ons**

A user must have at least Manage System permissions to configure add-ons.

To enable users to manage the Forms and Surveys App add-on:

1. Go to **User interface: Your avatar > Add-ons > All Add-ons > Installed**.
2. Find **Forms and Surveys App** in the list, click **the gear icon > Settings**.
3. Under **App Security**, click the gear icon next to **Forms and Surveys App**.

Figure 1: Forms and Surveys App add-on security settings

Forms and Surveys Add-On

Forms and Surveys Submission Add-On

4. If **All Registered Users** are to access the Forms and Surveys App and create forms:
 - a) Select the gear icon next to Forms and Surveys Add-on and enter **All Registered Groups**.
 - b) In the `/apps/forms-and-surveys-app` > click on Configuration Console > Ensure "All Registered Users are Authors" is enabled.
5. If only selected users are to access the Forms and Surveys App and create forms:
 - a) Select the gear icon next to Forms and Surveys Add-on and enter the corresponding user groups, for example, `forms-surveys-authors` or `forms-surveys-editors`.
6. Click **Configure Now**.

This opens a modal window.
7. Wait for confirmation that the middleware service URL was saved and click **Save and Close**.
8. Click **Save and Activate now**.

Creating and editing forms with the Forms and Surveys App

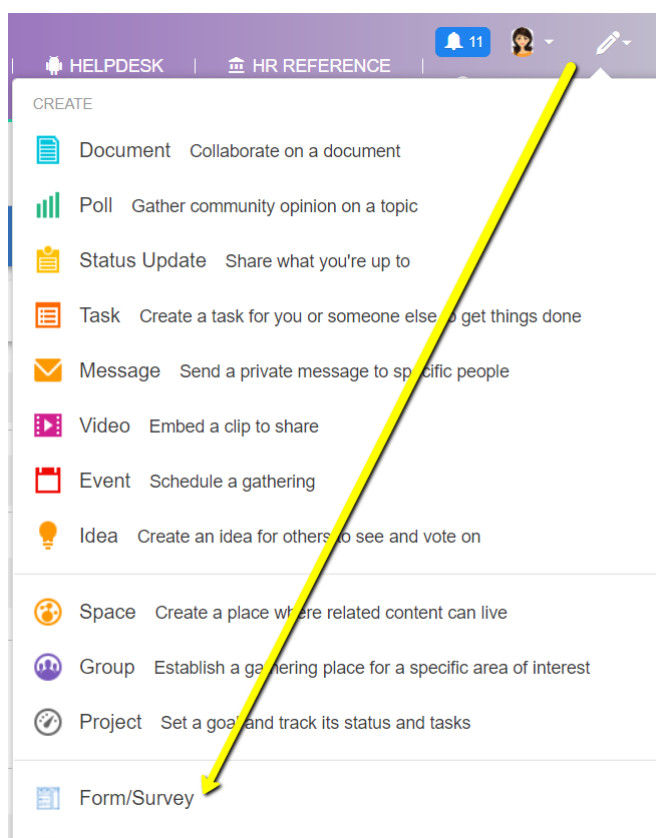
Here you can find details on creating and editing forms with the Forms and Surveys App.

Accessing the form list of the Forms and Surveys App

Here you can find details on accessing the form/survey list of the Forms and Surveys App.

To open the list of forms in the Forms and Surveys App, use one of the following options:

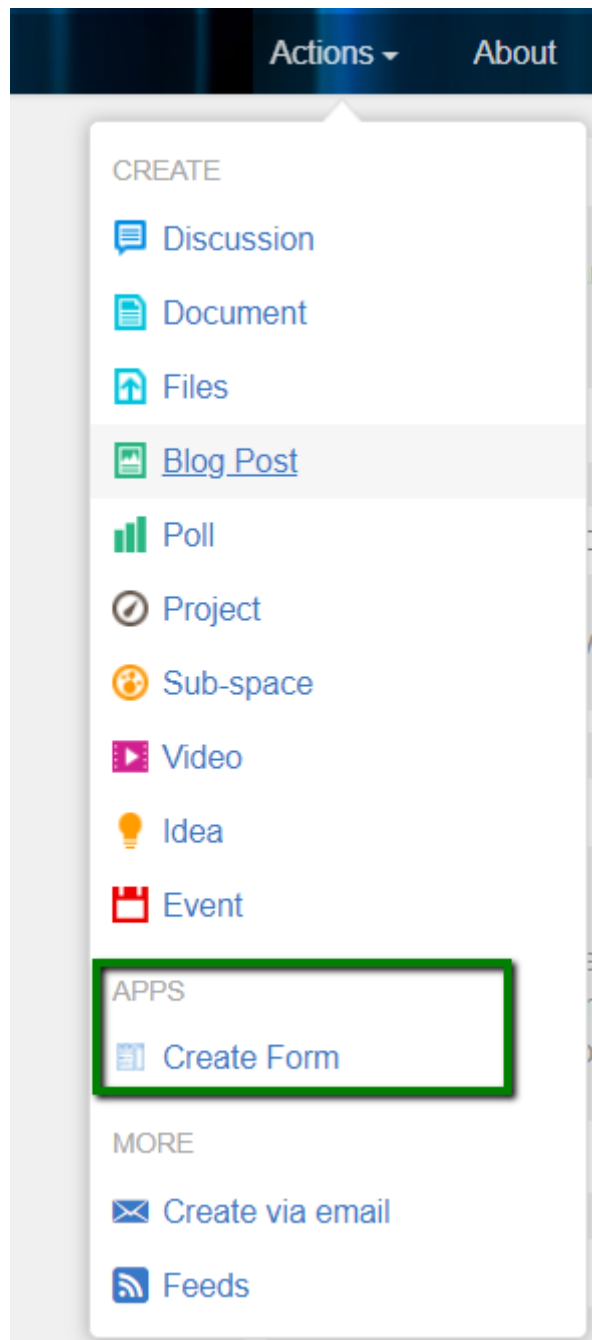
- Go to **Pencil icon > Create Forms/Survey** .



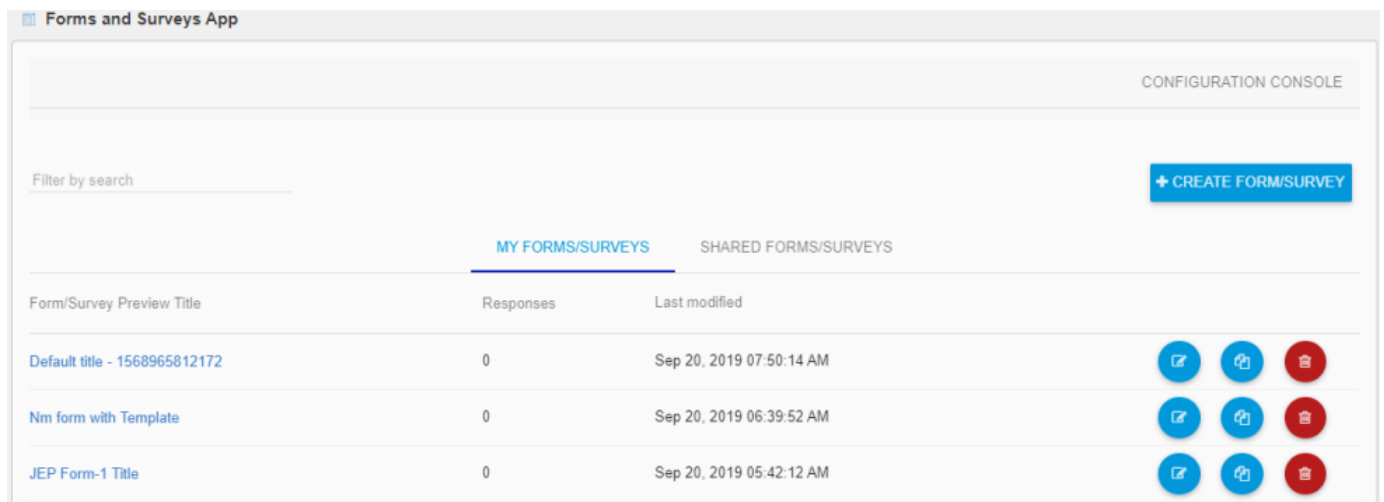
- Go to **Apps > Forms and Surveys App** .



- Enter the following URL: `<your Jive instance>apps/forms-and-surveys-app`.
- Go to **Action > Create form/Survey** .



The following screen is displayed, listing all forms created so far under the tab MY FORMS/SURVEYS. (The other tab SHARED FORMS/SURVEYS lists all those forms where the currently logged-in user has been added as a co-author.)



The user can either:

- Create a new form/survey by selecting + CREATE FORM/SURVEY.
- Edit an existing form/survey by selecting the relevant form title from the list displayed under Form/Survey Preview Title.

Creating and editing forms with the Forms and Surveys App

Here you can find details on using the Forms and Surveys App.

Attention:

Forms/Surveys Admin: Can configure App and access all Forms and Survey from all users.

Forms/Surveys Co-author: Can access the App and create, update, delete their own Forms/Survey.

1. On the list of forms, create a new form/survey by selecting + CREATE FORM/SURVEY.

OR Edit an existing form/survey by selecting the relevant form title from the list displayed under Form/Survey Preview Title.

A new form can be configured using the various form fields.

2. Provide a suitable **Title** for the new form and click **Create Form/Survey**.

Create Form/Survey

Form/Survey Preview Title *

JEP Form-1 Title

Following Characters are not allowed: @!#\$%^&*() \-+={}[]|\\\'\";:'. , ~№?<>

CREATE FORM/SURVEY

3. Use the form fields displayed on the top in the subsequent screen to configure the overall form:

Forms and Surveys App

BACK TO ALL FORMS/SURVEYS

CONFIGURATION CONSOLE

JEP Form-1 Title

DELETE FORM VIEW PREVIEW

CONFIGURATION FIELDS CONDITIONS RESULTS URL

Form/Survey Preview Title *

JEP Form-1 Title

| Options | Description |
|--------------------------|--|
| Configuration tab | Provide details here to set the overall configuration of the form. |
| Fields tab | Provide the information items (fields) to be displayed on the form. |
| Conditions tab | Add conditions, based on which the fields will be displayed on the form. |
| Results tab | Displays the inputs provided by the user, after they complete and submit the form. |

- At any point in time, select **Delete Form** on the top right corner to remove this form from the app.
- Select **View Preview** to have a glimpse of the configured form that will be displayed to the user.

4. On the **Configuration** tab:

Forms and Surveys App

BACK TO ALL FORMS/SURVEYS

CONFIGURATION CONSOLE

JEP Form-1 Title [DELETE FORM](#)

CONFIGURATION FIELDS CONDITIONS RESULTS URL

Form/Survey Preview Title
JEP Form-1 Title

Form/Survey Preview Description
This JEP Form-1 will be used to collect data for a sample survey.

Form/Survey Preview Image URL

Publish Location
☐ In a Place
☐ Specific People
☒ Public
☐ Hidden

Form Start Date and Time
Form End Date and Time

☒ Allow Users To Complete This Form Multiple Times?
☒ Anonymous Submission
☒ Display Start Page
☒ Display End Page

☐ Save Submission as Live Native Content
 Manage Co-author(s)
[ADD USERS](#)

[SAVE](#) [SAVE AND PUBLISH](#) [RESET TO PREVIOUS CONFIGURATION](#)

| Options | Description |
|--|---|
| Form/Survey Preview Description | Enter a brief description of this form |
| Form/Survey Preview Image URL | Provide the URL for the image to be displayed in the external object (which represents the form) published in a place |
| Publish Location | <p>Specify the Place, where the configured form can be viewed</p> <ul style="list-style-type: none"> • In a Place: Place: Form/Survey will be published as an external object in a Jive place. User can only select a place he/she has access to • Hidden: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link by Admins, Authors, and Co-Authors • Specific People: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link by Participants (and Admins, Authors, and Co-Authors) • Public: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link by any registered user |

- Enable/disable the following form elements as required:

| Options | Description |
|---|--|
| Form Start/End date and time | The time period during which the form will be active/valid. |
| Allow users to complete this Form multiple times | Allows the author to enable/disable multiple submissions of the Form/Survey. Default: Single submission |
| Anonymous submission | If enabled, User details will not be sent when submitting the completed form |
| Display Start/End Pages | If disabled, will not display the Welcome and Thank you pages in the form |
| Save submission as Jive native content | <p>If enabled:</p> <ul style="list-style-type: none"> • can save to a selected Place as Document / Blog Post / Question / Discussion • a TEMPLATE tab also appears on top of the screen along with the other tabs to facilitate the same functionality |
| Manage Co-authors | Select to add users (from a drop-down list), who can also author this form. In addition, the co-authors and their details will be listed below this field. |

5. Click **Save** to save the configurations.

OR **Save And Publish**: Saves the form and publishes in the selected place (usage if **Publish Location: In a Place** is selected).

6. On the **Fields** tab, click **Select Field**:

The screenshot shows the 'Forms and Surveys App' configuration console. At the top, there's a navigation bar with 'BACK TO ALL FORMS/SURVEYS' and 'CONFIGURATION CONSOLE'. Below this, a blue header bar displays 'JEP Form-1 Title' and a red 'DELETE FORM' button. The main configuration area has tabs for 'CONFIGURATION', 'FIELDS' (which is selected), 'CONDITIONS', 'RESULTS', and 'URL'. On the left, a 'Select Field' panel lists various input types: Textbox, E-Mail Address, Radiobox (Single Select), Dropdown (Single Select), Date, Textarea, Yes/No, Legal, File Upload, Rating, Link, Numbers, Info Text (No Input), Checkbox (Multi Select), and Profile Fields (Hidden). The main area on the right shows 'Configure Start Page' and 'Configure End Page' sections.

Items under **Select Field** can be selected as appropriate to set up various input fields on the form.

Table 1: Available Fields

| | |
|-----------------------|---|
| Textbox | Select to add text inputs fields. |
| Radiobox | Select to allow user to pick an option from several options displayed via radio buttons. Use + Add Option to add as many options to be displayed on the form. |
| Date | Select if the user is to input a date. |
| Yes/No | Select if user is to input either Yes or No. |
| Link | Select to accept a URL as input. |
| Info Text | Select to allow user to provide free-flow text as input. |
| E-Mail address | Select to capture an email address input type. |
| Dropdown | Select to allow user to pick an option from several options displayed via a drop-down list. Use + Add Option to add as many drop-drop values to be displayed on the form. |
| Textarea | Select to allow user to provide free-flow text within an area frame. |
| Legal | Select to allow "I accept/ I don't accept" agreements. |
| Rating | Select to facilitate the user to evaluate. Specify Number of Steps as the rating scale and also the Shape of the rating icon. |

| | |
|-----------------|---|
| Numbers | Input field which accepts numeric values only. |
| Checkbox | Select to allow user to pick an option from several options displayed as check-boxes. |

7. On the **Fields** tab, click **Configure Start Page**:

The screenshot shows the 'Edit Start Page' configuration interface. On the left, there are several input fields for configuring the start page: 'Start Page Title' (containing 'Welcome to Form'), 'Start Page Description', 'Background Image Url', 'Start Button' (containing 'Start'), 'Layout' (set to 'Image in the background'), and 'Links' (with an 'ADD LINK' button). At the bottom of this panel are 'SAVE' and 'CANCEL' buttons. On the right, a preview of the start page is shown. It features the title 'Welcome to Form', a disclaimer: 'Please be aware that all responses to this survey are anonymous. No personal identifiable information will be included in reporting, to ensure responses cannot be linked back to individual.', and a blue 'START' button.

Use the fields available here for displaying a Welcome note to introduce the form to the user. This will be displayed to the user before they can start providing inputs in the form.

8. On the **Fields** tab, click **Configure End Page**:

Use the fields available here for displaying a closure note or a thank you message for providing the inputs on the form. This screen will be displayed to the user after successfully submitting the form/survey.

9. On the **Conditions** tab, specify conditions to help decide when a field is to be displayed or hidden on the form so as to seek user's inputs selectively.

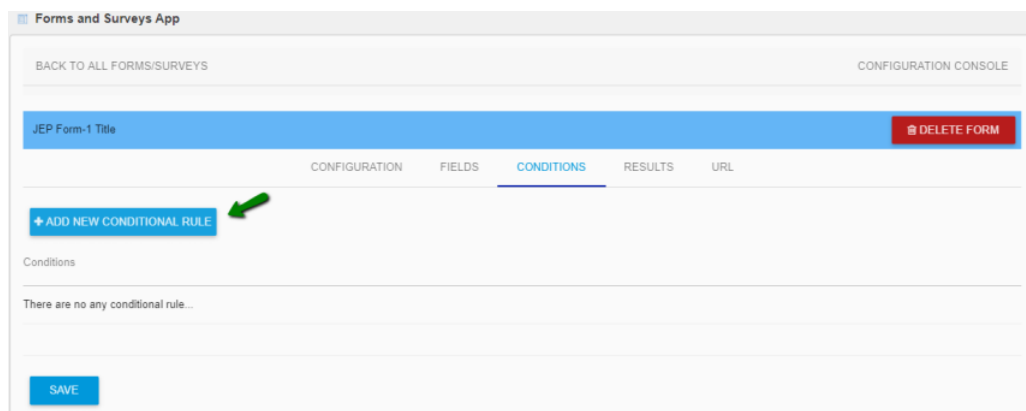
All fields can be used to build conditions, except **Info Text** and **Checkbox**.

Any one of the following Condition parameters can be selected:

- is equal to
- is not equal to
- contains
- does not contain
- ends with
- does not end with
- starts with
- does not start with

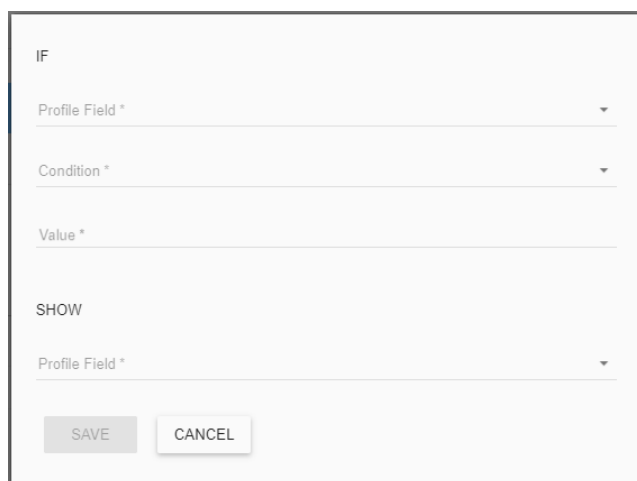
Only fields matching the condition will be displayed to the user.

10Select **+ Add New Conditional Rule** to add several rules.



The screenshot shows the 'Forms and Surveys App' configuration console. At the top, there's a header with 'BACK TO ALL FORMS/SURVEYS' and 'CONFIGURATION CONSOLE'. Below this is a blue bar with 'JEP Form-1 Title' and a 'DELETE FORM' button. The main area has tabs for 'CONFIGURATION', 'FIELDS', 'CONDITIONS' (selected), 'RESULTS', and 'URL'. Under the 'CONDITIONS' tab, there's a blue button labeled '+ ADD NEW CONDITIONAL RULE' with a green arrow pointing to it. Below this button, it says 'Conditions' and 'There are no any conditional rule...'. At the bottom left, there's a 'SAVE' button.

11For each condition, specify the condition that should match the value in the form field, based on which one or more form fields are to be displayed.



The screenshot shows a dialog box for configuring a condition. It has two sections: 'IF' and 'SHOW'. In the 'IF' section, there are three dropdown menus: 'Profile Field *', 'Condition *', and 'Value *'. In the 'SHOW' section, there is one dropdown menu: 'Profile Field *'. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

12The **Results** tab displays the results of the data captured after the form has been submitted by the user. Selected or ALL Results can be exported as JSON or CSV formats. The number of items/page can be customized.

The screenshot shows the 'Forms and Surveys App' interface. At the top, there's a header with 'BACK TO ALL FORMS/SURVEYS' and 'CONFIGURATION CONSOLE'. Below this, a blue bar displays 'JEP Form-1 Title' with 'DELETE FORM' and 'VIEW PREVIEW' buttons. A tab bar below the header includes 'CONFIGURATION', 'FIELDS', 'CONDITIONS', 'RESULTS' (selected), and 'URL'. The main area shows a 'DELETE SELECTED' button, a search filter, and 'EXPORT ALL AS JSON' and 'EXPORT ALL AS CSV' buttons. A table header shows columns for '#', 'Date Submitted (UTC)', and 'Profile Field - First Name'. A 'Items per page' dropdown is set to 25. A footer note states 'Result table is automatically being updated every 2 minutes'.

13 On the **URL** tab, on creating a form, the URL is automatically created. This link can be copied and used to access the configured form.

The screenshot shows the 'Forms and Surveys App' interface with the 'URL' tab selected. The header and top bar are the same as the previous screenshot. The tab bar now includes 'CONFIGURATION', 'FIELDS', 'CONDITIONS', 'RESULTS', 'URL' (selected), and 'TEMPLATE'. The main area contains a text box stating 'This is the direct link to your Form/Survey, permissions apply per configuration even when sharing the link directly' followed by the URL: <https://jivedemo-jep-qa.jivecustom.com/apps/forms-and-surveys-app?formid=2938&placeld=0>. A 'COPY TO CLIPBOARD' button is located below the URL.

Submitting a form using the Forms and Surveys App

Here you can find details on accessing and submitting forms using the Forms and Surveys App.

1. Go to **Main menu > Apps > Forms and Surveys App**.
2. Select the configured form under **My Forms/Surveys** or **Shared Forms/Surveys** appropriately, then go to the **URL** tab and **Copy the URL**.
3. Use the link to complete the form.
4. Click **Submit** to submit the form.

Functional Overview

Here is a functional overview of the Forms and Surveys Add-on.

Form/Survey Builder

The solution supports the following field types:

- Textbox (Text input field)
- Radiobox (Single select)
- Dropdown (Single Select)
- Yes/No (Single Select)
- Rating (Single select)
- Checkbox (Multi Select)
- Date (Date picker)
- Link (Text input field with URL validation)
- Email (Text input field with E-Mail Pattern validation)
- Numbers (Text input field with Number (0-9) Pattern validation)
- Legal (I accept/ I decline agreements)
- Info text (No input field)
- Profile Field (No visible to user)

Each field except "Info Text" and "Profile Field" provide the following settings:

- Title
- Description
- Required/Mandatory
- Conditional Rule

Info Text:

- Title
- Description

Profile Field:

- Title
- Dropdown to select profile field

Settings of each Form/Survey

- Title of Form (To be used on the external object)
- Description of Form (To be used as the "preview description" on the external object)
- Preview image (To be used on the external object)
- Form Fields

If a field is deleted from the configuration all associated entries from existing submission are deleted (cleared) as well

- Startpage: A page that is displayed to the user before seeing the Form/Survey:
 - Setting to Enable / Disable (Default = enabled)
 - Headline (Plain Text)*
 - Color theme: light, medium, dark
 - Description (Plain Text)
 - Color theme: light, medium, dark
 - Under description, the start page will display a message indicating if the survey is anonymous or not as follows:
`Please be aware that this survey is not anonymous. All responses can be linked back to the individual by the survey author.`
 - Background Image URL
 - Specify position
 - Start Button Display Name
 - Additional Links
 - Display Name
 - URL
 - Color theme: light, medium, dark
- Endpage: A page that is displayed to the user after successfully submitting the Form/Survey
 - Setting to Enable / Disable (Default = enabled)
 - Headline (Plain Text)*
 - Color theme: light, medium, dark
 - Description (Plain Text)
 - Color theme: light, medium, dark
 - Background Image URL
 - Specify position
 - End Button Display Name
 - Additional Links
 - Display Name
 - URL
 - Color theme: light, medium, dark

- Submission: Allows the Author to enable/disable multiple submissions of the Form/Survey
 - Default setting: Single Submissions
 - Error message in case user tries to access survey again
- Anonymity: If enabled no PII will be tracked/saved from the users who completes the Form/Survey
 - Jive User ID will be stored in DB (one way SHA encryption) to verify if user has already submitted the form
 - System wide setting that defines which fields can not be stored / used in conditional field > see global settings
 - If enabled information will be displayed on the startpage, external object and on the form submission page itself that this Form/Survey is anonymous
- Location: Allows the Author to specify the place in Jive where the Form/Survey should be published as an external object
 - In a Place: Place picker to select place: Form/Survey will be published as an external object in a Jive place
 - User can only select a place he/she has access to
 - Hidden: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link by Co-Authors
 - Hide option via setting
 - Specific People: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link
 - Hide option via setting
 - Public: Form/Survey will not be published as an external object in a Jive place but can be accessed via direct link
 - Hide option via setting
- Authors: Allows the Author to define additional (Co-)Authors
 - Provides same level of access as author has
- Publish Result: If enabled all submissions will be posted as a native Jive Content
 - User can select: Document, Blog Post, Question, Discussion
 - Place picker to select place where result will be published
 - Editor to define template look and feel
- Start Date/Time:
 - Define the date and time on which a user can fill out form/survey
 - External Object will be posted at the time the user clicks "Save and Publish"
 - "Start Button" on start page is not visible until start time is reached. Instead of "Start Button" message is displayed "The Form/Survey is closed until

DD.MM.YYYY - HH:MM"." Time is displayed in users local time. External Object does not indicate start or end time

- The (Co)author should be able change date/time anytime
- End Date/Time:
 - Define the date and time on which a user can no longer fill out form/survey
 - "Start Button" on start page is not visible after the end time is reached. Instead of "Start Button" message is displayed "The Form/Survey was closed on DD.MM.YYYY - HH:MM"." Time is displayed in users local time. External Object does not indicate start or end time
 - The (Co)author should be able change date/time anytime
- Save: Saves the form but **does not** publish in the selected place
- Save and Publish: Saves the form **and** publishes in the selected place
- Delete within the Forms and Survey App: Deletes the Form/Survey, and all its associated data (submissions) **but not** submission posted as Jive native content and not the external object
 - Add Alert to inform the user that external object will not be deleted
 - If the Form/Survey is deleted and a user clicks on "Start Survey" within the external object we will display a explanatory message to the user that this Form/Survey has been deleted.
- Delete the external object from Jive UI: This only deletes the external object leaving the Form/Survey and its associated data (submissions) untouched
 - Save and Publish will create the external object again if it was previously deleted via Jive UI

Conditional Fields

All Fields can be used to build conditions except "Info Text" and "Checkbox (multi select)"

- Condition parameter:
 - is equal to
 - is not equal to
 - contains
 - does not contain
 - ends with
 - does not end with

- starts with
- does not start with

Only fields matching the condition will be displayed to the user. Examples:

- Only show Field F if Field A equals UK (Implication: Hidden if Field A not equal UK)
- Only show Field G if Field A equals Germany (Implication: Hidden if Field A not equal Germany)

Global Settings for All Forms/Survey

Specify:

- Which profile fields to be always captured
- Which profile fields the user can select
- Which fields shouldn't be captured if anonymity is enabled
 - Which fields can be used in "profile field" field

Permission

Form/Survey specific permission

- Forms and Survey **Admin**: Can configure App and access all Forms and Survey from all users
- Forms and Survey **(Co)Author**: Can access the App and create, update, delete their own Forms/Survey
 - Admin can either allow all users (ARU) to create (CRUD) Forms/Survey or just a specific jive user group
- Forms and Survey **Submitter (=All registered user)**: Can submit/take a Form
 - If a Form/Survey is published in a specific place only users who have access to this place and view permission on external objects can submit/take the Form/Surve
- Full Export of all data as CSV

In conjunction with each submission the following attributes are saved by default

- Jive User ID (SHA encrypted)
- Date and Time (UTC) of submission
- Any metadata specified in the global settings

External Object

The solution can publish the Form/Survey as an external Object in Jive.

- **External Objects need to be enabled on place level by adding the Forms and Survey Stream Integration**