Jv Jive Interactive Intranet

Cloud User Guide

Jive Extensions: Forms and Surveys Add-on

Aurea
Unlimited Possibility

Notices

For details, see the following topics:

Notices

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Table of Contents

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- Search the articles on the Aurea Knowledge Base for solutions to your issues.

- Search the product documentation and other product-related information that are also available on Support Central.

If you still cannot find a solution, open a ticket on Aurea Support Central. Information about the support organization is available on Support Portal as well.

You can also find the setup files on Support Portal.

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
- Creating and editing forms with the Forms and Surveys App
- Submitting a form using the Forms and Surveys App

Installing Forms and Surveys Add-on

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

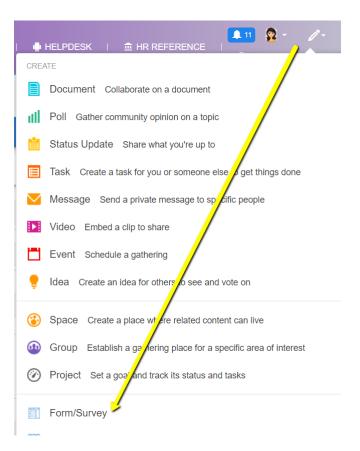## Creating and editing forms with the Forms and Surveys App

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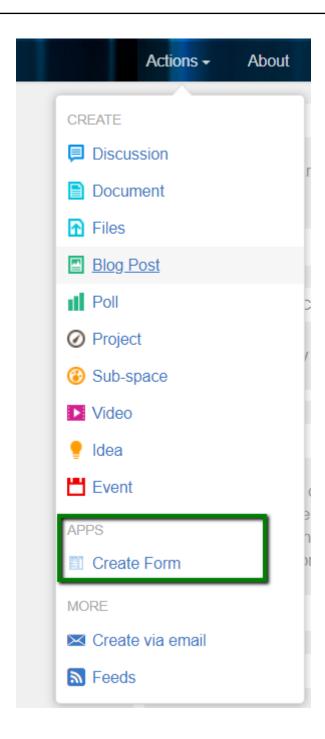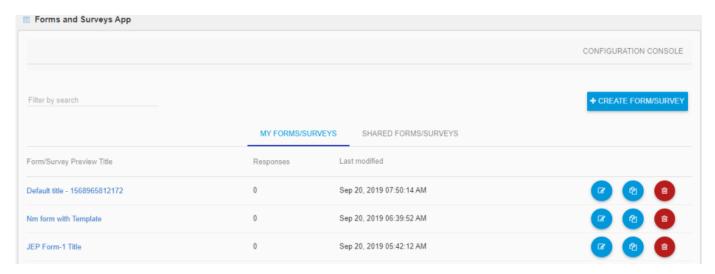
- Go to **Pencil icon** > **Create Forms/Survey** .

- 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.

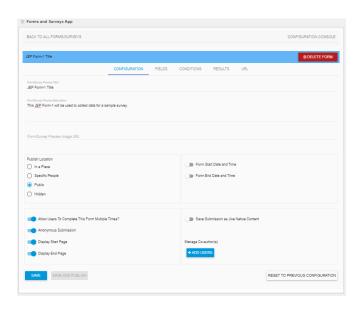2. Provide a suitable **Title** for the new form and click **Create Form/Survey**.

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

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:

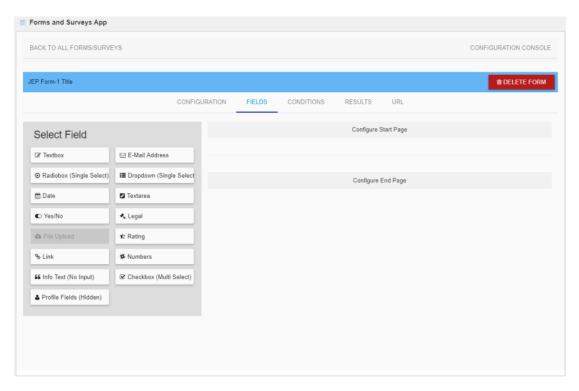| Options	Description
Form/SurveyPreview Description	Enter a brief description of this form
Form/SurveyPreview Image URL	Provide the URL for the image to be displayed in the external object (which represents the form) published in a place
Publish Location	Specify the Place, where the configured form can be viewed • **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	If enabled: • 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).
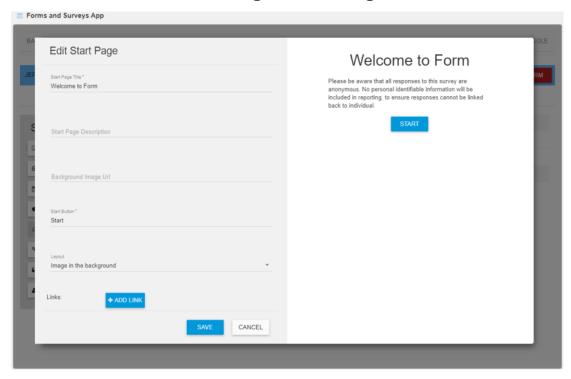
6. On the **Fields** tab, click **Select Field**:

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

Table 1: Available Fields

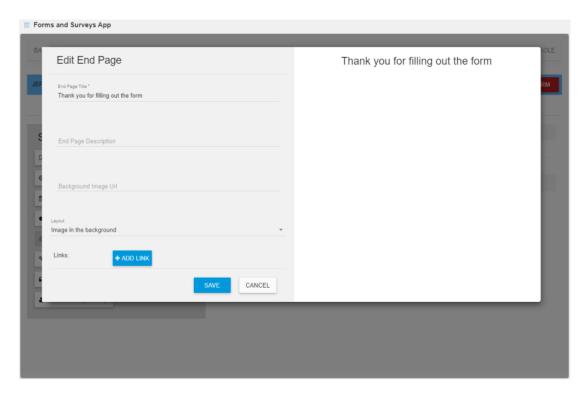| Textbox	Select to add text inputs fields.
Radiobox	Select to allow user to pick an option from several options displayed via radio buttons. Use + Add Option to add as many options to be displayed on the form.
Date	Select if the user is to input a date.
Yes/No	Select if user is to input either Yes or 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.

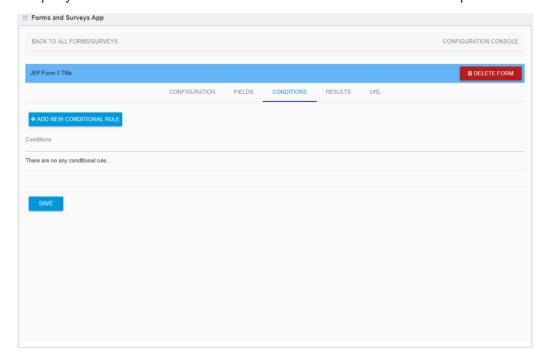7. On the **Fields** tab, click **Configure Start Page**:

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.
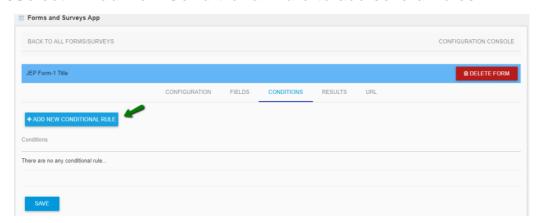

All fields can be used to build conditions, except **Info Text** and **Checkbox**.

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

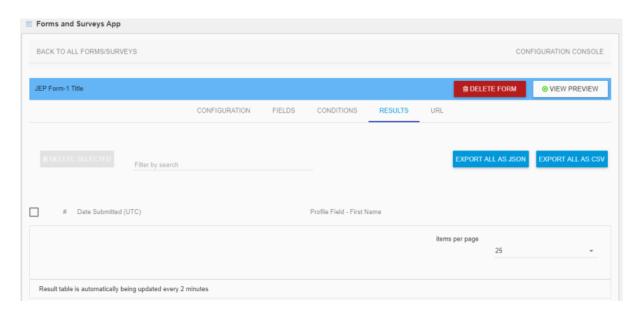Only fields matching the condition will be displayed to the user.

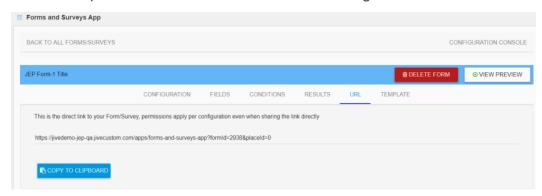10 Select **+ Add New Conditional Rule** to add several rules.

11 For 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.

12 The **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.

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.

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.