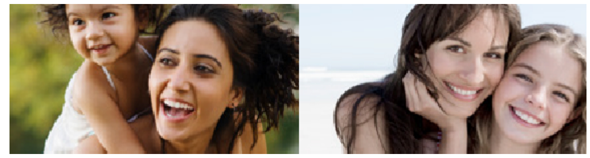

WEBSITE USER GUIDES

FORM BUILDER 2.0 USER GUIDE

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Annual Membership Forms

NCL, Inc. creates a number of annually required global forms for Chapters to use each year. Each year these annual forms are assigned to Patronesses based on their position as a requirement by NCL, Inc. Board forms are also assigned to Chapter leaders based on their board position.

Chapters can view the submissions of these forms in Form Builder. NCL, Inc. will “archive” prior year forms at the end of each year. Form entries for past years are available to be viewed by looking at archived forms in the Form Builder tool or in the profile of individual members.

The following forms are required to be completed by a Patroness each year:

- Annual Patroness Agreement
- Annual Ticktocker Agreement
- Hold Harmless Agreement for Ticktockers 18 or Over
- Hold Harmless Agreement for Ticktockers Under 18
- Parent-Guardians Permission and Emergency Medical Form

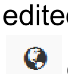
Chapter Leaders are required to complete additional forms based on their position.

- Chapter Board Commitment Letter
- Chapter Confidentiality Agreement
- Chapter Conflict of Interest

The Photo Release and Consent Form is required to be completed one time by a new Patroness and Ticktocker pair when they apply to join NCL, Inc. The form is part of the application and is not required to be resubmitted annually. The submissions are stored in Form Builder 2.0. Chapter Leaders must review the submissions to see if the new member does or does not give permission to use their photo.

Creating New Forms

In addition to global forms that NCL, Inc. creates, the Form Builder 2.0 tool allows chapters to create custom online forms for the purpose of gathering information from members. The global forms in Form Builder are designated by the globe icon in the Actions column and cannot be edited by local chapters, however, the submissions can be reviewed by the local chapter.

 Global Form Icon

If you need a chapter specific form, you can create your own form in the Form Builder tool. You can then add the link to that form on a page on your website, assign that form as a requirement to your members or email members the link to the form.

A. Creating a Form

1. Go to Admin > Member Management > Form Builder 2.0
2. Click the + button at the top of the page.
3. In the **‘Setup’** tab complete the required fields. There is no need to complete

non-required fields, but they are explained below.

FORM DETAILS:

- ***Form Name –** Enter the name of the form.
- **Form Type** – not used
- **Form Code** – not used
- **Category –** Select the category of the form if desired. Typically not used. (see section C for how to create a Category).
- **Public? –** Public refers to people who are not your members. This allows you to select whether the form can be available on the public website. Always select 'No' for chapter forms, so that only members can complete the form and the system will track who submitted the form. If you select 'Yes' and members complete the form the system will not track which member submitted the form.
- **Label Alignment –** Determines if the Question label is above the answer (Top) or to the Left of the answer (Left).
- **Form Description –** Description of the form for admin purposes.

START AND END DATES: Not required, however, dates can be used if you want to limit when the form can be completed.

- **Form Start Date –** The date in which the form will be available. This can be a date in the past or a date in the future, but is not a required field.
- **Before Start Date Message –** This is the message shown if the user tries to complete the form prior to the start date.
- **Form End Date –** The date the form is no longer available for submission.
- **After End Date Message –** This is the message shown if the user tries to complete the form after the end date.

ENTRIES PER USER: Not required, however, entries can be anonymous or limited to one per member.

- **Are entries anonymous? –** Determines if entries are submitted anonymously, if not anonymous the form will capture the name of the member submitting the form.
- **Limit to one entry per user –** Limits the user to submit only one entry per form. If Yes, then:
  - **Allow user to edit submission** – Determines if the user is allowed to edit their form after submission.
  - **Alert message for user when no more than one entry** – If there is a limit of one entry per user, then this is the message that will be displayed if they try to submit the form multiple times.

END USER EMAIL NOTIFICATION: Not required, however, an email can be set up to send to the member when they submit the form.

- **End User Email Notification –** Indicates if the user will receive an email notification when a form is submitted. If 'Yes', then:
  - **From Name –** Name from which this email will come (no symbols allowed, only letters).
  - **From Email –** Email address from which this email will come, use donotreply@nclonline.org

- **Email Subject –** The Subject line of the email.
- **Email Top Message –** Top content of the email message.
- **Email Bottom Message –** Bottom content of the email message.

ADMIN EMAIL NOTIFICATION: Not required, however, an email can be set up to send to an admin each time a member submits the form.

- **Admin Email Notification –** Indicates if an Administrator will receive an email notification when a form is submitted. If 'Yes', then:
  - **Admin Email 1 –** Email address of the Administrator to receive the email.
  - **Admin Email 2 –** Email address of an additional Administrator to receive the email.
  - There are up to five email addresses that can be entered.

GROUP ACCESS: Recommended to leave at the default 'Select', however, the form can be set up with restrictions.

- **Which Access Group Can Fill Out This Form** – Allows you to designate which Access Group can view and complete the form.
- **Which Access Group Can View The Form Submissions** – Allows you to designate which Access Group can view the submissions.
- **Which Access Group Can Manage The Form** – Allows you to designate which Access Group can manage this form. If you select a group here, only members included in the group can manage the form. Members with Form Builder admin rights will not be able edit the form if they are not in this group unless you select 'Yes' in the next section.
  - **Allow Form Administrators to View/Edit the Form –** If an Access Group is designated for managing this form, then this field determines whether Administrators also have the ability to view/edit the forms

FORM CONFIRMATION: After the member submits the form, they can be redirected to a website page or provided a message.

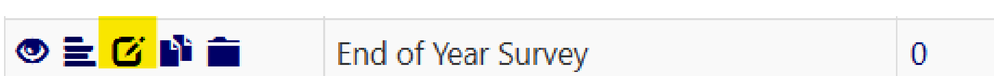
- **Destination URL –** Directs an individual to a specific website page after submission of the form. For example, you can send a Member to the home of your website or to an external URL.
- **Confirmation Message –** The message that will display when a form is submitted.

4. Click the 'Save Form' button at the bottom of the page to save the form.

B. Adding Form Questions

1. Go to Admin > Member Management > Form Builder 2.0

2. Click the 'Edit' button next to the form in which you would like to add questions.



3. In the **'Edit'** tab, click the 'New Field' button on the bottom of the page to add questions.

There are a variety of types of questions that can be added.

4. Enter in the fields/questions as follows:
   - **Field Label** – Enter the title of the field or the question to ask
   - **Report Label** – Used for administrator purposes for managing form fields but not displayed to the end user.
   - **Field Type** – Defines the type of information captured by the question, such as checkbox, short text or dropdown. (See Field Type Option below for more details)
   - **Is Admin Only** – Select yes to make a field visible only to admin.
   - **Field Code** – Is not used.
   - **Sort Order** – Allows you to organize the display of these fields from first to last. Note that after the Form fields are created, you will be able to change the order simply by dragging and dropping the fields on the 'Form Fields' screen.
   - **Is Required** – Can define if this field is required by the end user. If the question require a response there will be an * right before the question in the form.
   - **Instructions** – Enter instructions for the question.

5. Click the 'Save' button.

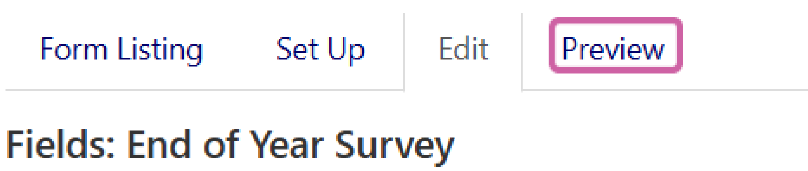
6. Repeat steps 3 – 5 until all fields/questions have been created.

7. Once you have multiple fields/questions, you can change the order of the fields simply by dragging and dropping the fields on the 'Form Field List' screen.

NOTE: Forms should not be edited after you begin taking submissions. If someone has submitted a response to the form and you add another question or edit a question, the data will be collected, however, when you export the data the report will be skewed since not all submissions had the same questions. To avoid this, you could copy the existing form, insert the new question where you want it and then make the new form available to be completed.

C. Previewing your Form

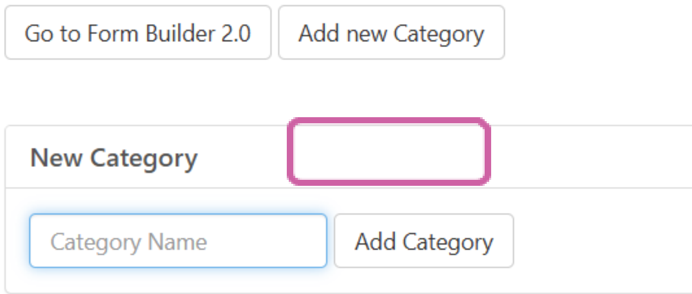
1. You can preview the form by selecting the **'Preview'** tab.



D. Creating Form Categories

Form Categories are used to help organize forms. You can assign a form a category as you create them. You can also filter by category on the main Form Category List dashboard. To create a form category:

1. Go to Admin > Member Management > Form Builder 2.0.
2. Click the 'Manage Categories' button on the bottom of the page.
3. Select 'Add New Category'.
4. Enter the name of the category and click Add Category.



5. The ‘Actions’ column on the Form Category List dashboard allows you to rename a form category or delete those that are no longer in use.

Setting up Email Notifications

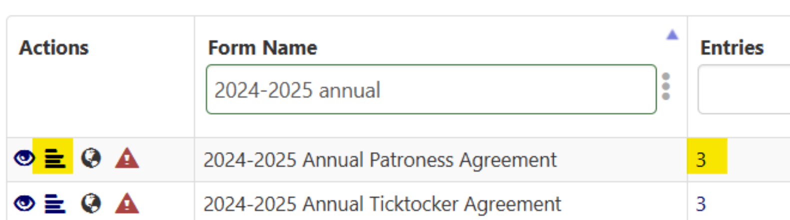
To set up email notifications in a form, watch our video that is linked on the [Form Builder](#) page in the Help Center.

Viewing Submittals and Exporting Form Data

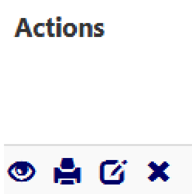
To view your form submissions:

1. Go to Admin/Member Management.
2. Select ‘Form Builder 2.0’.
3. Click the ‘Entries’ (four bars) icon next to the form you would like to view or click the number in the Entries column.

   Note that there could be multiple pages of forms so if you don’t see the form you are looking for; you may need to scroll to another page or search for the form using the Form Name filter.



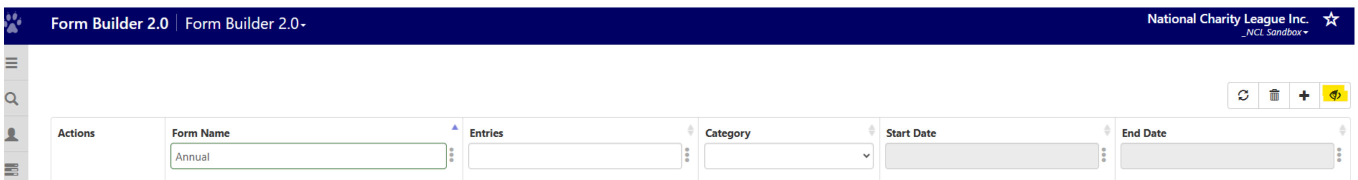
4. Use the icons in the Actions column to view, print, edit or delete the form submission.



5. To change the data in the view, click **Manage Columns** at the bottom of the page. Check or uncheck the fields you want to display or include in the export and click the ‘Go Back’ button at the bottom of the form.

7. Click the ‘Export to Excel’ button at the bottom of the page to export the data to Excel.

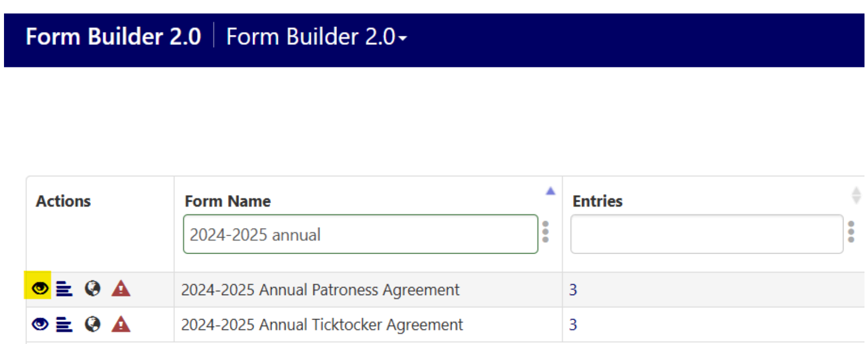
Note: To view past years forms click on the eyeball with a diagonal line icon in the top right corner.



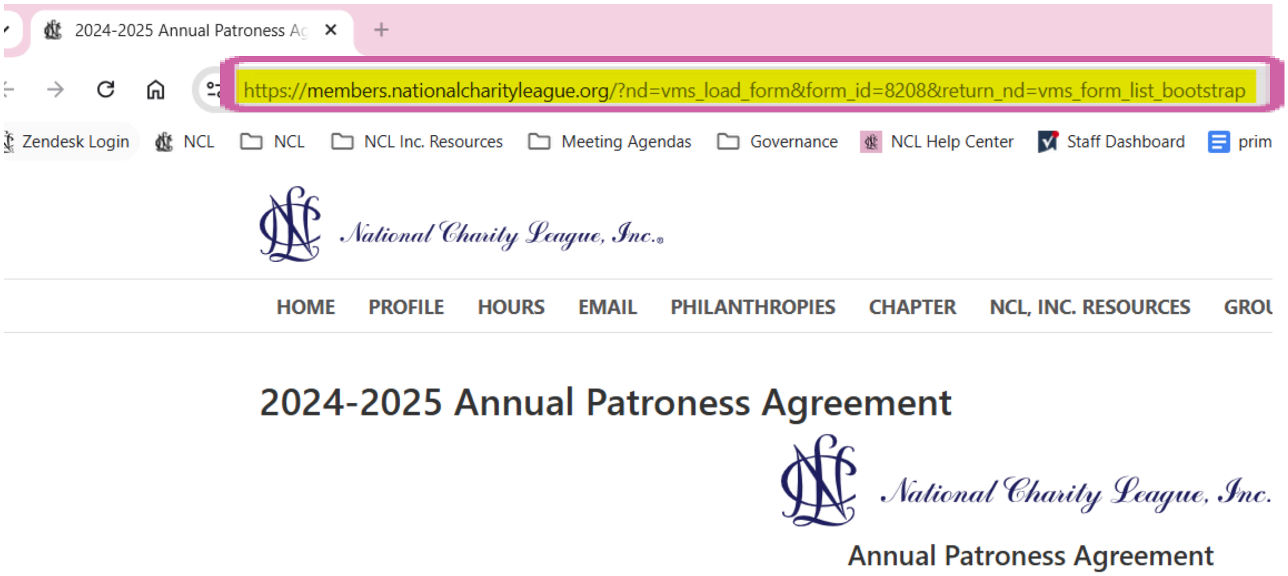
Posting a link to a Form on a Website Page

A link to your Form can be inserted into a content page, could be made into its own page under the Chapter tab or inserted as News on the Home page. You can link to both global forms or local forms created by your Chapter.

A. Copy the link to the form you would like to post.
   1. Go to Admin > Member Management > Form Builder 2.0.
   2. Click the ‘View’ icon in the Actions column for the form. Verify that you see the blue ‘Submit’ button at the bottom of the form. This indicates you are on the actual form, not the setup of the form.

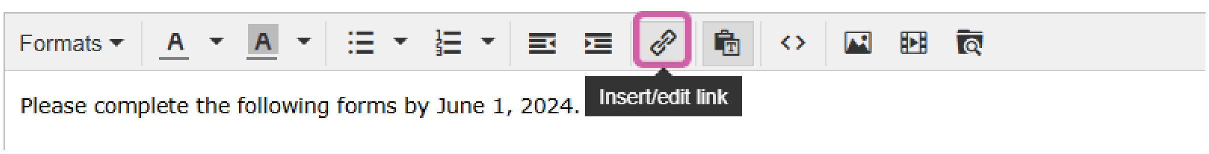


   3. Copy the entire URL at the top of the form. This is what you will hyperlink on the content page.

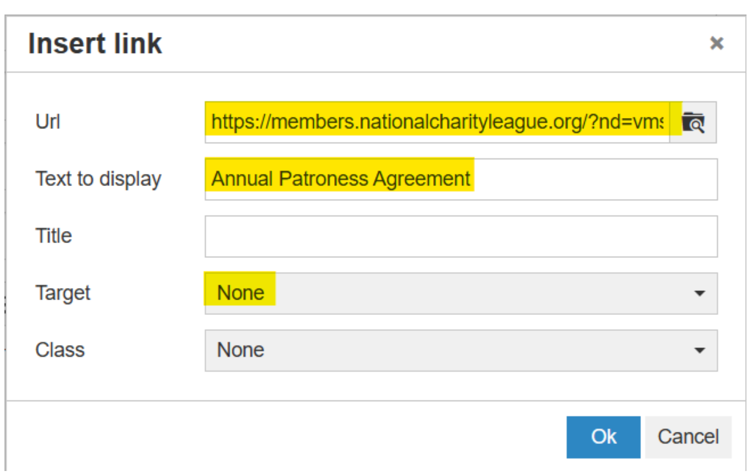


Determine where you want to post the link and go to that page on your website. This may be your News area on the home page or a content page on your Chapter tab. You could also simply send the link in an email.

A. Hyperlink to the form on the News page or a Content page.
   1. Click the Insert/Edit Link icon.



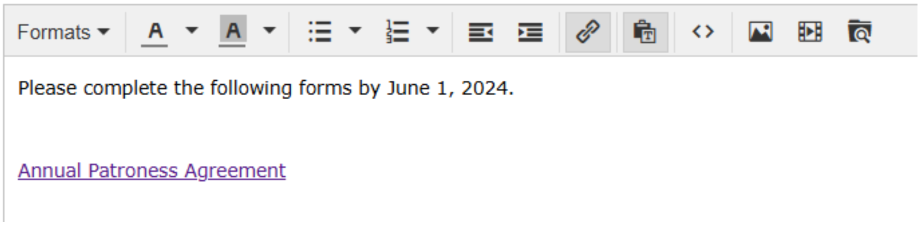
   2. In the 'Insert/Edit Link' window, paste the copied form link you obtained previously in the URL box.



   3. In the Text to display, type the text that you would like to be hyperlinked.

4. In the Target window select None. This ensures that the form will open properly on both the website and app.

5. Select ‘OK’. The form name will now display as a hyperlink.



6. Save the update to the content page. Be sure and test that the form links are working properly on both your website and app.

Assigning a Chapter Created Form as a Requirement

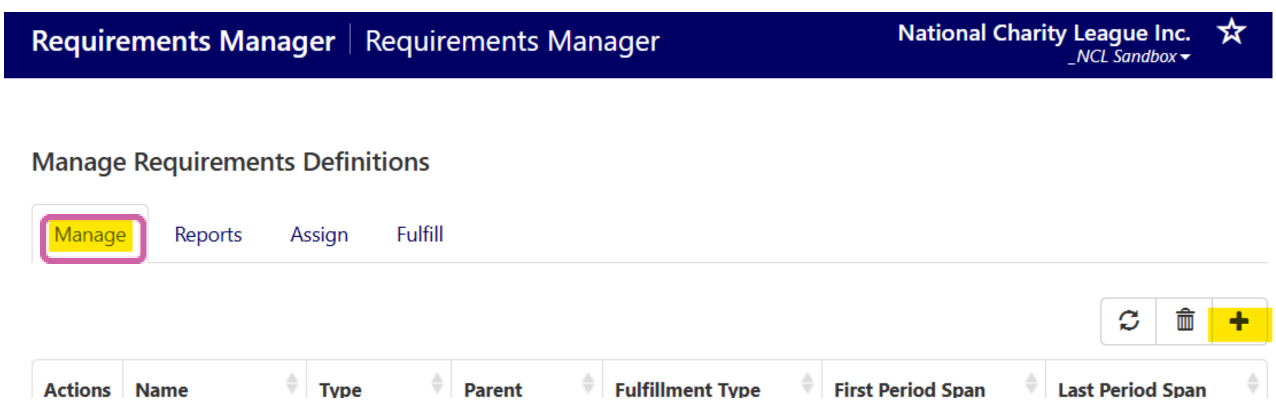
Any locally created forms *could* also be assigned to your members as a requirement. This ensures they see the form requirements with their other requirements and once submitted, the form requirement will be marked complete. If you assign a form as a requirement, you can also run reports to see who has and who has not submitted the form.

To assign the form as a requirement, you must also create a *requirement* for the form you created in Form Builder.

A. Create a requirement for a form.

1. Go to Admin/Member Management>Requirements Manager.

2. Click on the Manage tab and then click the + to add a new requirement.



3. In the *Requirement Name box, type the name of your requirement.

4. In the *Requirement Type box select Form.

5. In the *Form box select the name of the form you have already created in Form Builder.

6. In the *Show in Registration Tool box select no. Yes is only used for requirements that are

fulfilled by attending events.

7. In the *Parent Requirement, select No.

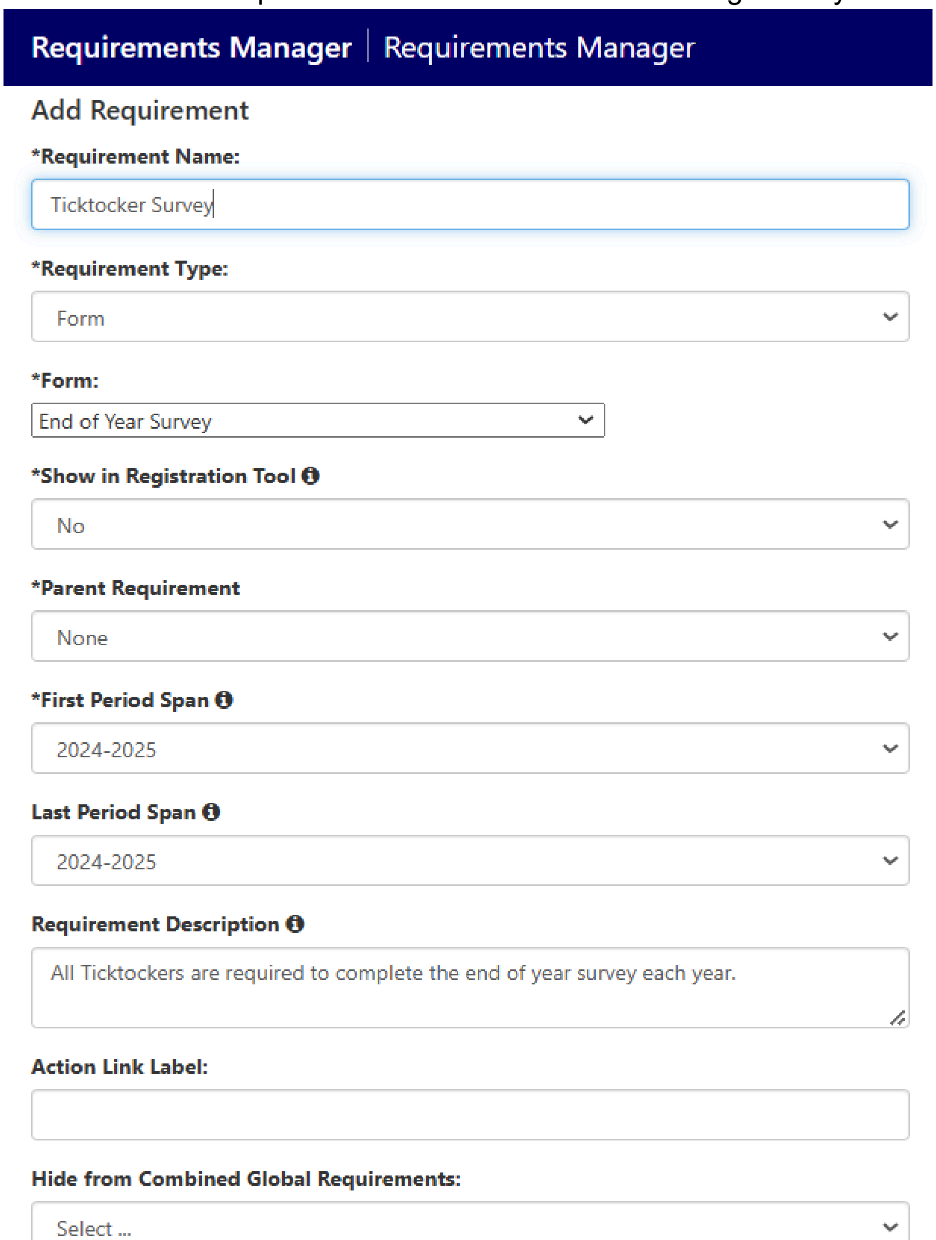
8. In the *First Period Span, select the first year you wish to use this requirement.

9. The Last Period Span is not required. If left blank, the requirement will always be available to assign to your members. Otherwise, select an end period span.

10. Enter a description.

11. Leave all other fields blank.

12. Click Save. The requirement is now available to be assigned to your members.



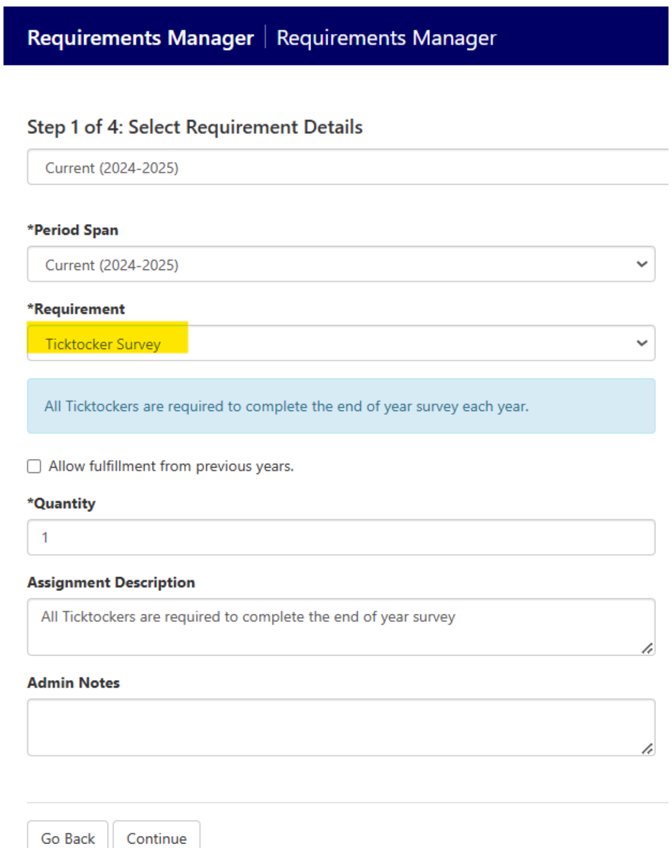
B. Assign the requirement to your members.

1. In Requirements Manager, click on the Assign tab. You will see a list of local requirements that have previously been assigned to your members.

2. Click the + to assign the form as a new requirement.

3. Complete the four step process for assigning a requirement.

4. In Step 1, select the new form requirement that you created in the previous step in the ***Requirement** box



5. Click **Continue**. Complete the remaining steps to assign the requirement. See the [Requirements Page] in the Help Center for details on how to assign the requirement.

FIELD TYPE OPTIONS

Field Type Option	Description

Checkbox	Allows a series of checkboxes the user can select. (See screenshots below). If this field type is selected then additional configuration items will be open including: **How many columns –** You can include one, two or three vertical columns in which the checkable items will appear. **Allow 'Other' Value –**Adds an 'Other' option to the list of options. If selected it will allow the user to add the answer in a short text box next to that option. You must click the 'Add/Edit Options' link next to the field to save your selection of checkbox items. Enter the checkbox item name and select 'Add'. Continue until all checkbox items have been entered. Once all entries are entered click X in Options row to exit (See screenshots below).
Currency	Limits entry to dollars and cents.
Dates	Limits the answer to date format, but only allows a response ten years before and after today's date.
Display text	Allows entry of blocks of text.
Dropdown *	Allows the creation of a custom dropdown menu in which you can designate the user to select an answer. **Allow Multiple Selection** – Allows the user to select multiple answers. **Allow 'Other' Value** –Adds an 'Other' option to the list of options and adds a textbox to enter the value, if selected. You must click the 'Add/Edit Options' link next to the field to save your selection of dropdown items. Enter the dropdown item name and select 'Add'. Continue until all dropdown items have been entered. Once all entries are entered click X in Options row to exit (See screenshots below).
Dropdown – Yes/No	Allows a dropdown menu with the values of 'Yes' and 'No'.
Email	Limits the answer to an email address form.
File Upload	Limits the answer to include an up loadable file.
Integer	Limits the answer to be in a whole number.
Memo	Allows the end user to answer the question with a large block of

	text.
Phone	Limits the answer to a phone number.
Radio Button *	Allows you to create a series of options the user can select and limits the answer to one selection. If this field type is selected then additional configuration items will be open including: **How many columns –** You can include one, two or three vertical columns in which the checkable items will appear. **Allow 'Other' Value –**Adds an 'Other' option to the list of options. If selected it will allow the user to add the answer in a short text box next to that option. You must click the 'Add/Edit Options' link next to the field to enter your selection of radio button items. Enter the radio button item name and select 'Add'. Continue until all radio button items have been entered. Once all entries are entered click X in Options row to exit (See screenshots below).
Rich Text	Allows the user the ability to use a tiny FCE editor to answer the question.
SQL Field	We recommend not using this field
Section	Allows you to organize your form into different sections with headings.
Short Text	Limits the answer to a short text.
Terms and Conditions	Allows you to create an expandable section creating a long series of terms and conditions that can be expanded or shrunk to save space.
Terms and Conditions Checkbox	Allows you to create a checkable item showing that they agree to that particular item.

*The Checkbox, Dropdown and Radio Button field type values will all require you to click the 'Add/Edit Options' link to enter in all the possible values for that field.

Click 'Add' to insert values. After the last value is entered, click the X in the upper right to close window.