# Chainformation Admin User Guide
## (Forms Module)

Last Updated: March 30, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to create new forms, manage saved forms and their reports.

Every **Chainformation** platform features an integrated form builder module. **Chainformation** allows you to create internal online forms by adding questions with various types of answer choices. These input options may include text, numeric, single/multiple choice and file attachment answers. Furthermore, you can make a form more interactive and dynamic by adding conditional logic to its questions. Conditional logics allow you to customise the information asked from a user based on how they fill out the form.

You can also add other elements to a form along with questions including heading, text message and media files. You can share a form with your selected colleagues and also send them reminders to submit their answers to the form if they do not respond in the specified period.

Here is a list of some typical organizational tasks that you can automate and solve using the **Chainformation Forms** module:

- Internal surveys and questionnaires
- Invitations to events, training sessions, etc.
- Error and deviation reports for equipment, deliveries, etc.
- Support requests
- Campaign monitoring and evaluation
- Fire checks and other safety routines
- Staff onboarding and knowledge tests

Every **Chainformation** platform has a built-in **Reports** section in its **Forms** module. The **Reports** tab of the **Forms** page contains all the answers that have been received to date, along with the list of your selected colleagues who have answered and who have not answered at all.

You can also push a reminder to your colleagues with whom a form has been shared and they have not answered it yet. Along with the collection of answers to a form in the **Reports** module, you can also opt to email copies of submissions to a form to you, your selected colleagues and even external email addresses.

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*NOTE to SUPERADMIN: You must first make the proper settings for the **Forms** module in your **system setup** to control which **Roles** in your organisation are allowed to share forms and see form reports.  See the User Guide for **Roles Administration***
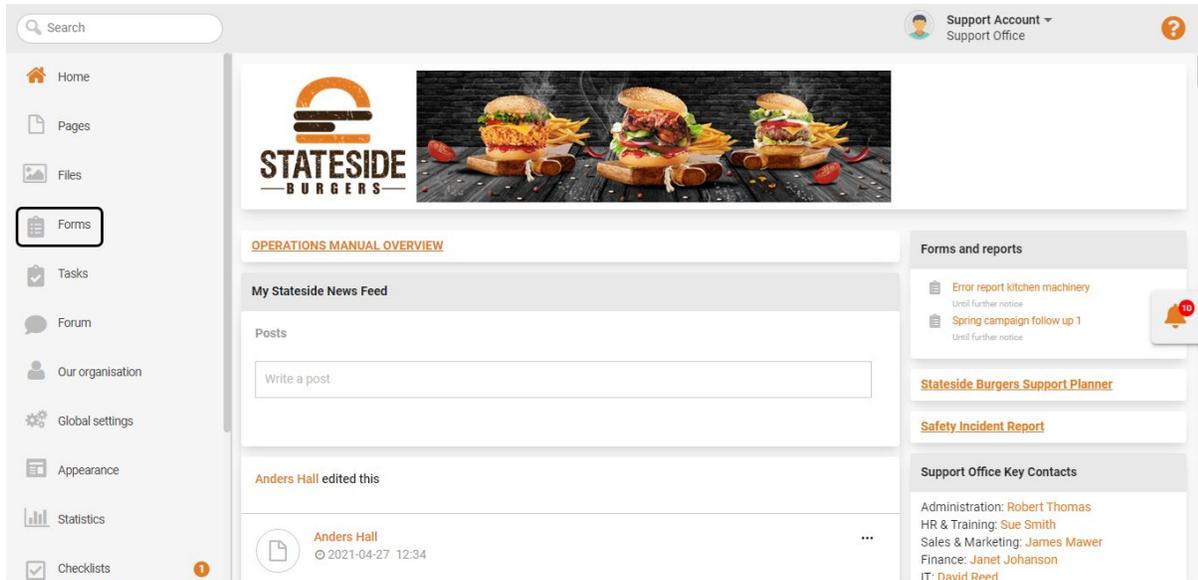
Here is a list of all the features of the **Forms** and **Reports** modules that we will discuss in this manual.
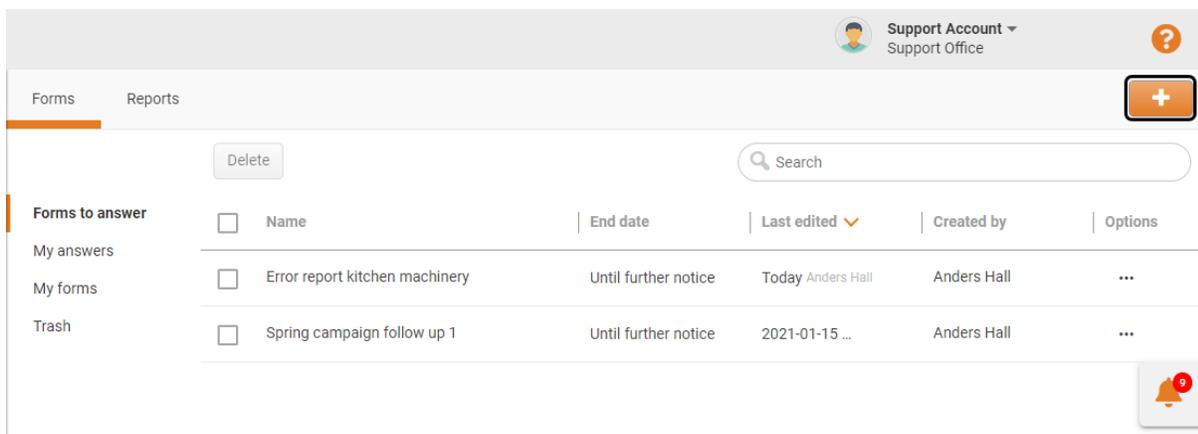
# Create a New Form

Once you have logged in to the **Chainformation** platform then follow these navigation steps to **create** a **new form**.

1. Click the **Form** button in the left-side menu to open the **Forms** tab.



**Note:** You cannot create or edit **Forms** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new form or edit a saved form. However, all users can easily access, use and fill out a Form in the mobile app.

2. Click the **(+)** icon in the top-right corner of the **Forms** page to create a new form.



This will open the **New form** page. By default, you will be redirected to the **Form** tab of the **New form** page.

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On the **Form** tab, follow the navigation steps demonstrated below to create a new form.

3. Enter a **Form name**.

4. Enter a **Description** of the new form.

This optional description will be shown before the first question when a user will fill out this form.

5. Select the **Content language** for the new form.

**Note:** By default, the system will create only one version of the selected form and that will be in your **default content language**.

However, you can also create other versions of the selected form in different languages if you have added some additional content languages to the **Chainformation** platform.

Now, proceed to add **form elements** to the new form by clicking on an element in the left-side menu of the **New form** page or dragging and dropping it into your required position on the form.

Here is a brief summary of all elements that you can add to a form.

6. You can add a **Heading** widget to further explain a question or questions of the new form.

7. You can add a **Media** widget to the new form and upload an image or video from your computer or **Chainformation File Manager**. See the User Guide for **Files**

8. You can add a **Text message** widget to write a text message along with the questions of the new form.

You can format the text in this widget using some basic text formatting tools and link it to other internal functions; **checklist**, **colleague**, **file**, **page**, **form**, **website** and **email address**.

Now, we will discuss all types of questions that you can add to a form.

9. You can add questions with the Text **answer** option that will accept answers in the form of plan text.

10. You can add questions with the Numeric **answer** option that will accept numeric answers only.

11. You can add **Single choice** questions and set pre-defined answers for them. Users will select one of the given options when they fill the form.

12. You can add **Multiple choice** questions and set pre-defined answers for them. Users can select multiple answers from the given option when they fill the form.

13. You can add options for a **Single choice** or **Multiple choice** question by clicking the **Add Option** button below the question.

14. You can move an option up or down by clicking the **Menu** icon next to the option and dragging it to the new position.

15. You can delete an option by clicking the **Bin** icon next to it.

16. You can add questions with the File **attachment** option. Users will answer such questions by inserting a file from **Chainformation File Manager**, their smartphones, tablets or desktop devices. See the User Guide for **Files**

16(c). Enter the **Header text** that will be shown above the **attachment button**.

16(d). Enter the **Button text** that will be shown on the **Upload button**.

17. You can move a **Form element** up or down by clicking and dragging it to the new position.

18. You can make a question mandatory by clicking the **Ellipsis** icon next to it and selecting the **Mandatory question** option from the dropdown menu.

18(a). The system will add the **Required field** (*) icon to a mandatory question and users cannot submit the form without answering this question.

19. You can disable a question by selecting the **Disabled question** option from this dropdown menu.

The disabled question will not be shown with other questions when a user will fill out the form. When you disable a question, previous answers submitted to this question will still be available in the selected form report.

You can include a disabled question back in the form by deselecting the **Disabled question** option.

20. You can delete a question or any other form element by clicking the **Delete question** button from this dropdown menu.

**Note:** By deleting a question you will also delete all saved answers related to that question. So, disabling a question might be a better option instead of deleting it.

21. Now, click the **Conditional logics** button in the header menu of the **New form** page to open the **Conditional logic** tab.

**Chainformation** allows you to customise the visibility of questions or other form elements of a form by adding conditional logics to them.

You can add one or multiple conditions to hide or show specific questions or other form elements depending on answers to previous questions.

Furthermore, you can trigger multiple outcome effects and show various new follow-up actions when a certain condition is met.

**Remember**, you must have included at least two questions or a question and any other form element to add a condition to a form. In other words, you cannot add conditional logic to a single question.

22. On the **Conditional logic** tab, click the **NEW CONDITION** button to add a new condition to questions and other form elements of the new form.
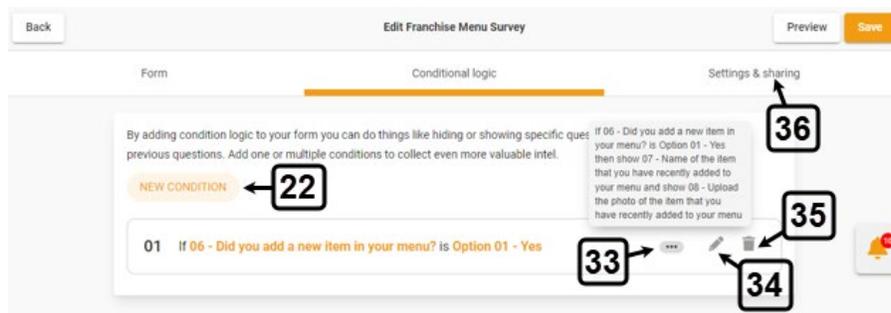


This will open the **New condition** dialogue where you can define requirements and outcome effects of the selected condition.
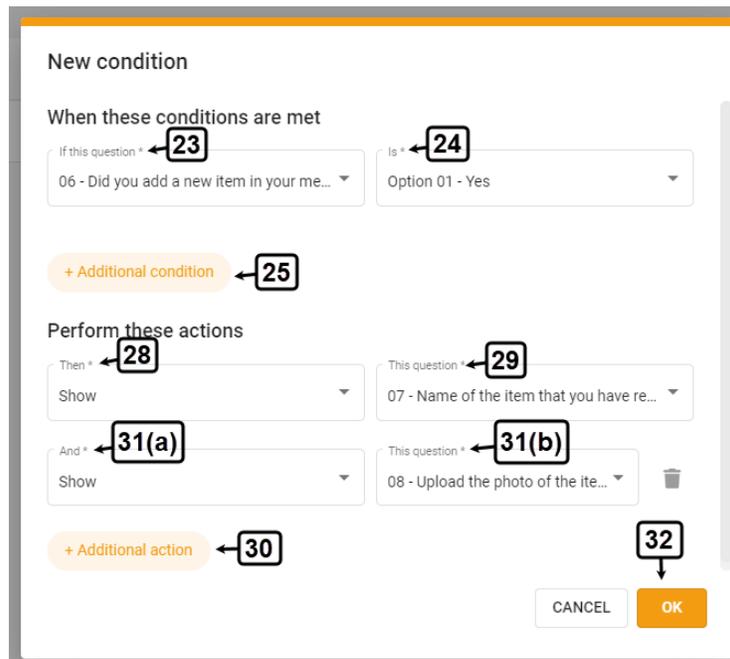


23. In the **If this question** field under the **When these conditions are met** menu, select the question on which the applied condition will depend.

24. In the **Is** field, select the statement of the selected question to which the condition will be applied.

25. You can also link a question or other form element to more than one question by adding one or more additional conditions to an already applied logic.

Click the **+ Additional condition** button to add an additional condition.

This will open the **Additional condition** options menu where you can select the **And/Or** option.

26(a). If you select the **And if** option for the additional condition then the desired outcome of the selected conditions will happen only, if all of these conditions have been met.

26(b). If you select the **Or if** option for the additional condition then the desired outcome of the selected conditions will happen, even if either one of these conditions has been met.

27. Select appropriate options in the **If this question** and **Is** fields of the additional condition as demonstrated earlier.

Now, under the **Perform this action** menu, define what will be the desired outcome when the selected conditions are met.

28(a). In the **Then** field, select the **Show** option if you want to show a question or another form element when a user selects the statement you have entered in the **Is** field.

28(b). In the **Then** field, select the **Hide** option if you want to hide a question or another form element when a user selects the statement you have entered in the **Is** field.

29. In the **This question** field, select the question or other form element that you want to show/hide when a user selects the statement you have entered in the **Is** field.

30. Click the **Additional action** option if you want to show/hide another question or form element when the selected conditions are met.

31. Select appropriate options in the **And** and **This question** fields of the additional action as demonstrated earlier.

32. Click the **OK** button to add the conditional logic with the selected options to the new form.

33. You can view details of a condition by hovering your mouse to the **Display** icon  next to it on the **Conditional logic** tab.

34. You can edit requirements and outcome effects of an existing condition by clicking the **Edit** icon next to it.

35. You can delete an existing condition and all its additional conditions by clicking the **Delete** icon next to it.

36. Now, click the **Settings & sharing** button in the header menu of the **New form** page to open the **Settings & sharing** tab.

On the **Settings & sharing** tab, select appropriate options in the **Settings** section following the navigations steps as demonstrated below.



37. Check the checkbox next to the "**Show as news at startpage**" option if you want to share the new form as an automatic news update on the start page.

38. Check the checkbox next to the "**Colleagues may answer more than once**" option if you want to allow selected users to answer or fill out the form more than once.

For example, you can send a reminder to your colleagues for a monthly survey and they will answer the same form every month. This will save your time and effort to create a new form with the same questions again and again.

39. Check the checkbox next to the "**Send an email copy of submissions to form creator**" option if you want to receive the answers submitted by your selected colleagues to your email inbox.

The system will send a copy of each submission to your email address and save the submissions in the **Reports** tab of the **Forms** page.

If you do not select this option, all submissions will be saved in the **Reports** tab but you will not receive any email copy.

40. Check the checkbox next to the "**Send an email copy of submission to participant**" option if you want to send the answers submitted by your selected colleagues to their email inbox.

The system will send a copy of the submission to the email address of your selected colleague when they fill out the form and save the submission in their **My answers** folder on the **Forms** page.

If you do not select this option, submissions by your selected colleagues will be saved in their **My answers** tab but they will not receive any email copy.

41. Check the checkbox next to the "**Allow others to see report**" option if you want to allow your selected colleagues to see submissions to this form. Otherwise, selected users can only answer the form but cannot access its **Reports** section.

42. Check the checkbox next to the "**Show in to-do list**" option if you want the new form to show in the to-do list of your selected colleagues.

43. Check the checkbox next to the "**Anonymous answers**" option if you want to keep all answers submitted to the selected form fully anonymous.

**Remember**, when you select the "**Anonymous answers**" option for a form, the system saves no information about who submits an answer to it. This means your selected colleagues can answer the selected form anonymously as many times as they want.

Hence, selecting the "**Anonymous answers**" option for a form automatically enables the "**Colleagues may answer more than once**" option for it.

44. You can send additional email copies of submissions to your selected colleagues by selecting their names from the dropdown menu in the **Click to choose colleagues** field.

46. You can send additional email copies of submissions to some external persons by entering their email addresses in the "**Enter email addresses**" field.

46. In the **Sharing settings**, select the **Not shared** option if you do not want to share this form with any other user in your organisation for now.

47. If you want to share the new form with your colleagues, select the **Continuous** option and set a **Start date** when the form will be available to the selected users in your organisation.

Now the form will be available forever to the selected users and they can answer it any time until it's manually changed.

48(a). If you want to share the form with your colleagues for a definite period, select the **Time limited** option.

48(b). Set a **Start date** when the form will be available to the selected users in your organisation.

48(c). Set an **End date** when the form will be no longer available to the selected users in your organisation.

49. Select a **Sharing selection** for the new form. See the User Guide for **Sharing Selection**

**Note:** A Sharing selection will be effective only if you have selected the **Continuous** or **Time limited** option.

If you have selected the **Not Shared** option, then the form will be shared with no other users in your organisation regardless of the sharing options you have selected in the **Sharing selection** field.

Once you have formatted the new form, carefully review all the information on the Form, Conditional Logic, Settings & sharing tabs.

50. Click the **Preview** button to see how the form will look when you have shared it with your colleagues.

51. Once you have reviewed the preview of the new form, click the **Back** button in the top-left corner of the **Preview** tab to go back to the **New form** page.

52. On the **New form** page, click the **Save** button in the top-right corner of the screen to publish the new form and share it with your selected colleagues.

# Review Saved Forms and Answers

Once you have opened the **Forms** page on the **Chainformation** website platform as demonstrated in the previous section, you can view different forms under the following categories.
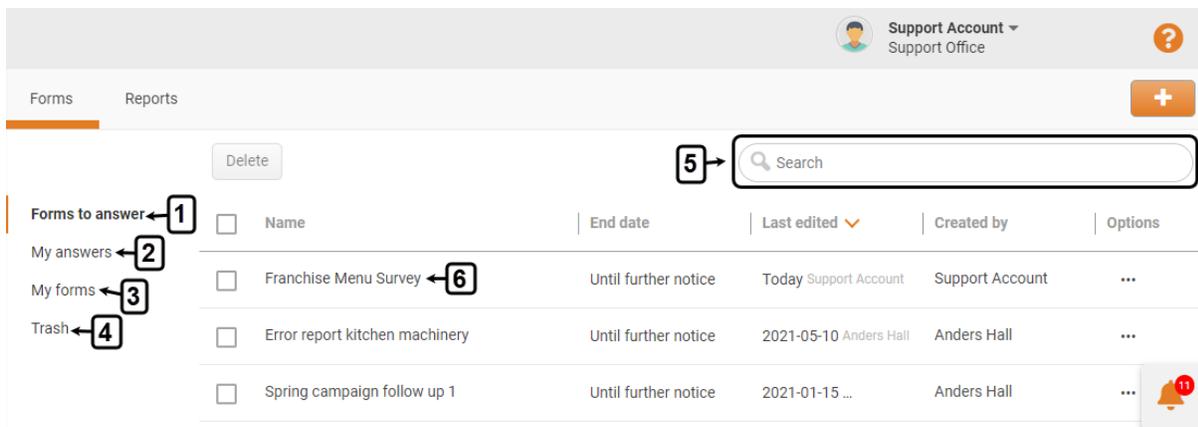


## 1. Forms to answer

By default, you will be redirected to the **Forms to answer** tab. This tab contains the forms that you or your colleagues have shared with you and you have not answered them yet.

## 2. My answers

**My answers** tab contains the forms that you have answered and submitted to the **Chainformation** database. See the User Guide for **Answer and Submit a Form**

2(a). You can see your answer to a form by clicking your account name right below the form name on the **My answers** tab.
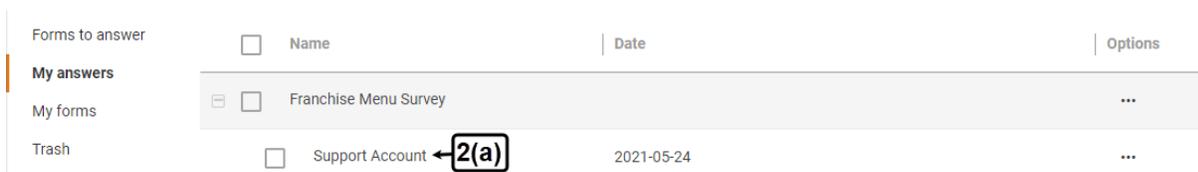


**Note:** If the form creator has allowed selected users to answer the form more than once then the form will be shown in both, the **Forms to answer** and **my answers** tabs when you will have answered it at least once.

## 3. My forms

**My forms** tab contains the forms that have been created by you.

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## 4. Trash

The **Trash** folder contains the forms that have been deleted by you or your colleagues from the **Templates** tab. <u>See the User Guide for **Trash**</u>

## 5. Search a Form

You can also use the **Search** field to find a form based on any of the available data/information. <u>See the User Guide for **Search**</u>

## 6. Review Details of a Form

You can review all questions and other elements of a form by clicking its name in its relevant category on the **Forms** page.

# Answer and Submit a Form on Chainformation Website

1. Open the form that you want to answer by clicking its name on the **Forms to answer** tab of the **Forms** page. See the User Guide for **Review Saved Forms**

2. You can also open a form to answer from your **to-do list** if the form creator has opted to show the form in it.

Follow the navigation steps demonstrated below to open a form to answer from your **to-do** list.

2(a). Click the **Notification** icon on the home page or any other page of the Chainformation platform.

2(b). Click the **Forms** button in the header menu of your **to-do** list to open the list of forms to answer.

2(c). Open the form that you want to answer by clicking its name from the list of forms to answer.



3. On the selected **Form** page, answer the questions asked in the form.

4. If you belong to more than one unit and the selected form is shared with at least two of your units, you will be asked to select the unit for which you are submitting this answer.

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5. You must answer all questions with the **Required field** (*) icon because these are mandatory questions and you cannot submit the form without answering them.

6. Once you have answered all questions of the form, carefully review all the information you have entered.

**Remember**, you cannot edit your answer once you have submitted the form. However, you can resubmit the form if the form creator has allowed users to answer the form more than once.

7. Click the **SUBMIT FORM** button to submit the form.

The system will send your answer to the form creator and all other relevant people.

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# Answer and Submit a Form in Chainformation Mobile App

1(a). Open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.

1(b). Click the **Forms** button in your profile menu to open the **Forms** tab that contains all forms to answer.

1(c). Open the form that you want to answer by clicking its name from the list of forms to answer.
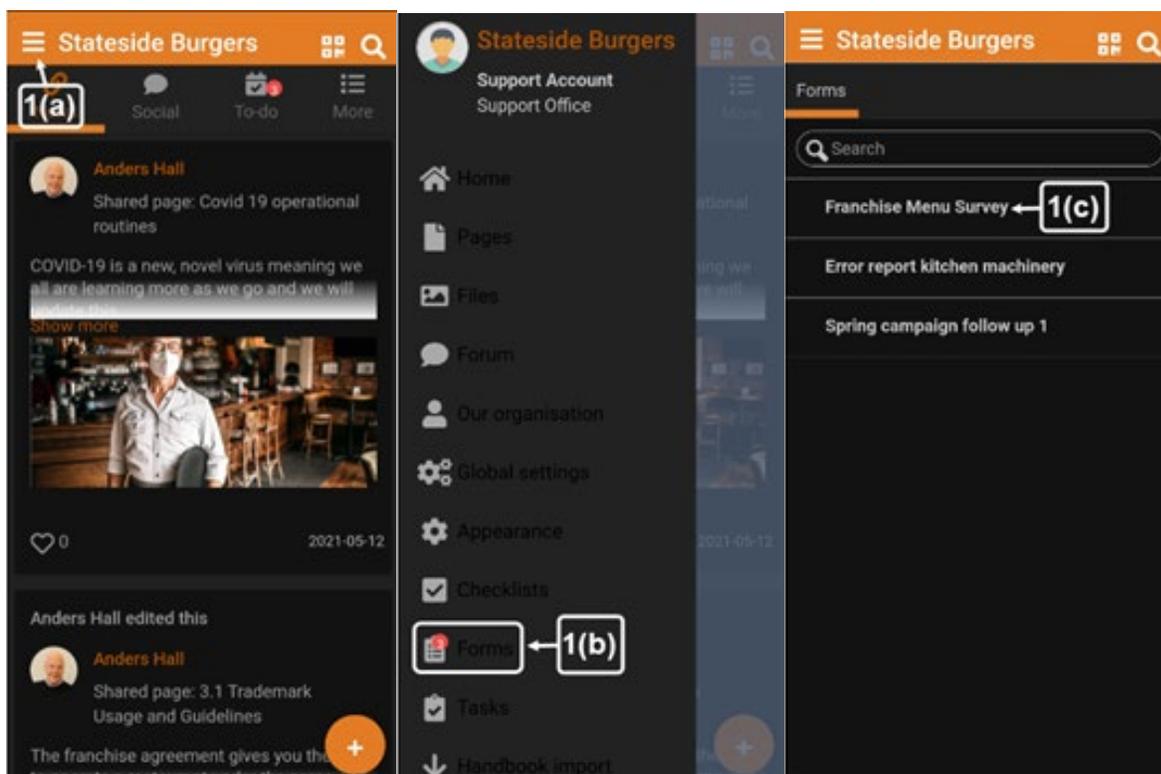


2. You can also open a form to answer from your **to-do list** if the form creator has opted to show the form in it.

Follow the navigation steps demonstrated below to open a form to answer from your **to-do** list.

2(a). Click the **To-do** button in the header menu of the **Chainformation** app's home screen to open your to-do list.

2(b). Click the **Forms** button in your to-do list to open the **Forms** tab that contains all forms to answer.

2(c). Open the form that you want to answer by clicking its name from the list of forms to answer.
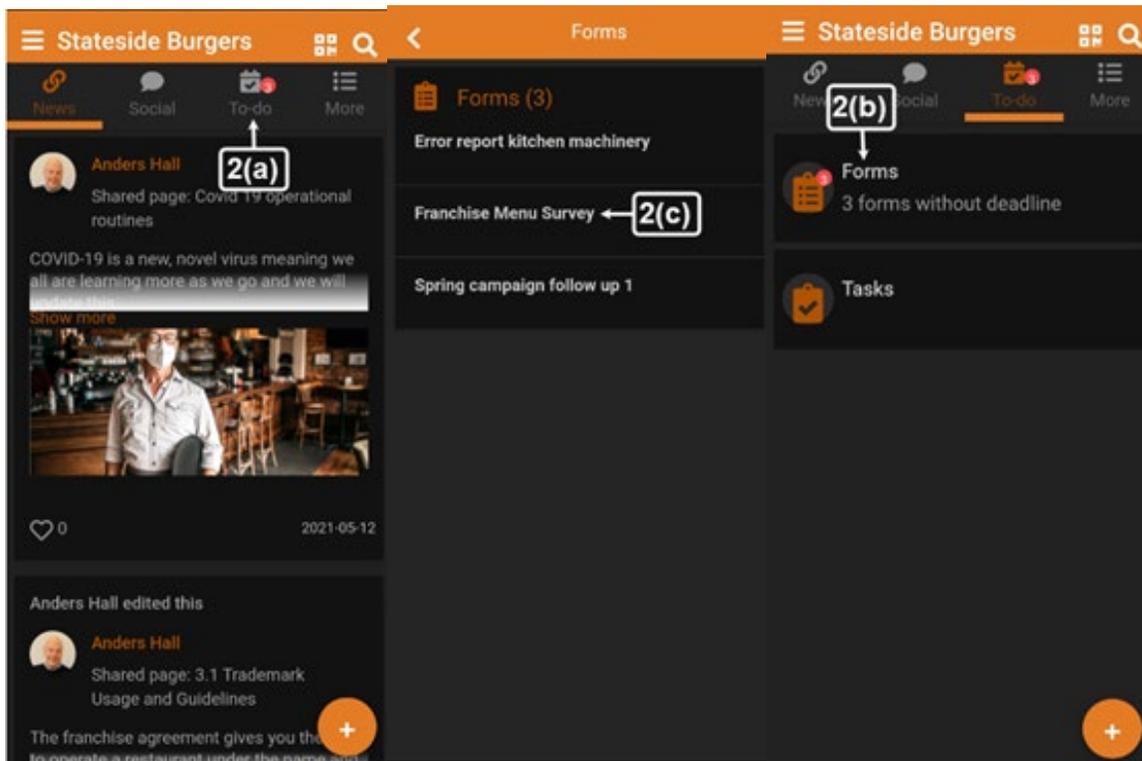


3. Once you have opened the selected form, follow the navigation steps demonstrated in the previous section to answer its questions and submit it. <u>See the user guide for **Answer and Submit a Form on Chainformation Website**</u>



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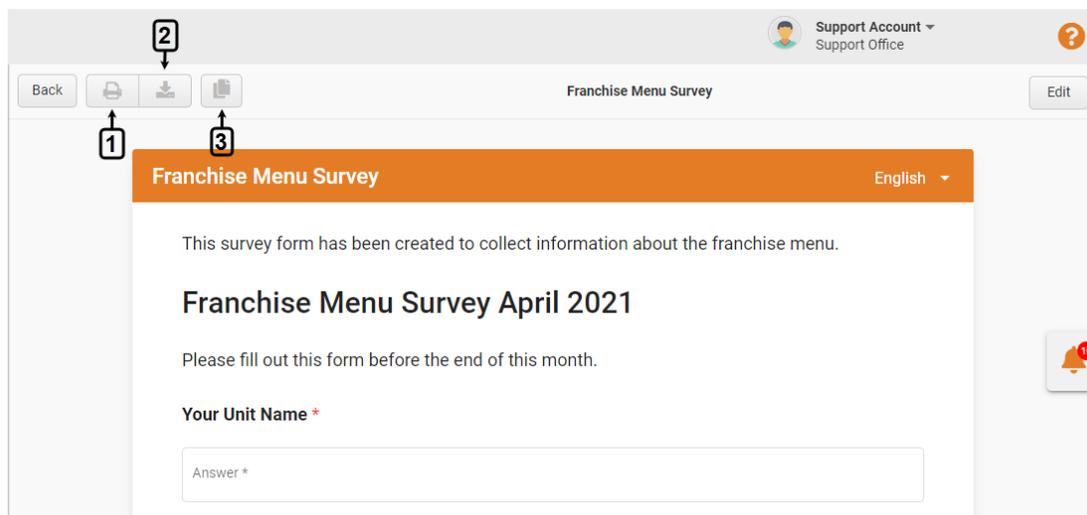
# Print a Form or Answer

To print a form or an answer to a form, open that form or answer following the navigation steps demonstrated in the previous section. <u>See the User Guide for **Review Saved Forms and Answers**</u>

1. Click the **Print** icon on the page dedicated to your selected form or answer to print them.

# Download a Form or Answer

To download a form or your answer to a form, open that form or answer following the navigation steps demonstrated in the previous section. <u>See the User Guide for **Review Saved Forms and Answers**</u>

2. Click the **Download** icon on the page dedicated to your selected form or answer to download their PDF version to your computer.

# Create Copy of a Form

Chainformation allows you to create a copy of a form and make changes to it before saving it.

To create a copy of a form, open that form or your answer to it following the navigation steps demonstrated in the previous section. <u>See the User Guide for **Review Saved Forms and Answers**</u>

3. Click the **Copy** icon on the page dedicated to your selected form to create its copy. This will open the **Edit Copy of the Form** tab where you can make necessary changes in the existing content of the form before saving the copy. <u>See the User Guide for **Edit a Form**</u>

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# Edit a Form

Chainformation allows you to edit form elements, settings or both. Follow the navigation demonstrated below to edit a form or its copy.

1. Open the form you want to edit or your answer to it following the navigation steps demonstrated in the previous section. <u>See the User Guide for **Review Saved Forms and Answers**</u>

2(a). Click the **Edit** button in the top-right corner of the page dedicated to your selected form to open the **Edit Form** tab.

2(b). Click the **Copy** icon on the page dedicated to your selected form to open the **Edit Copy of the Form** tab.
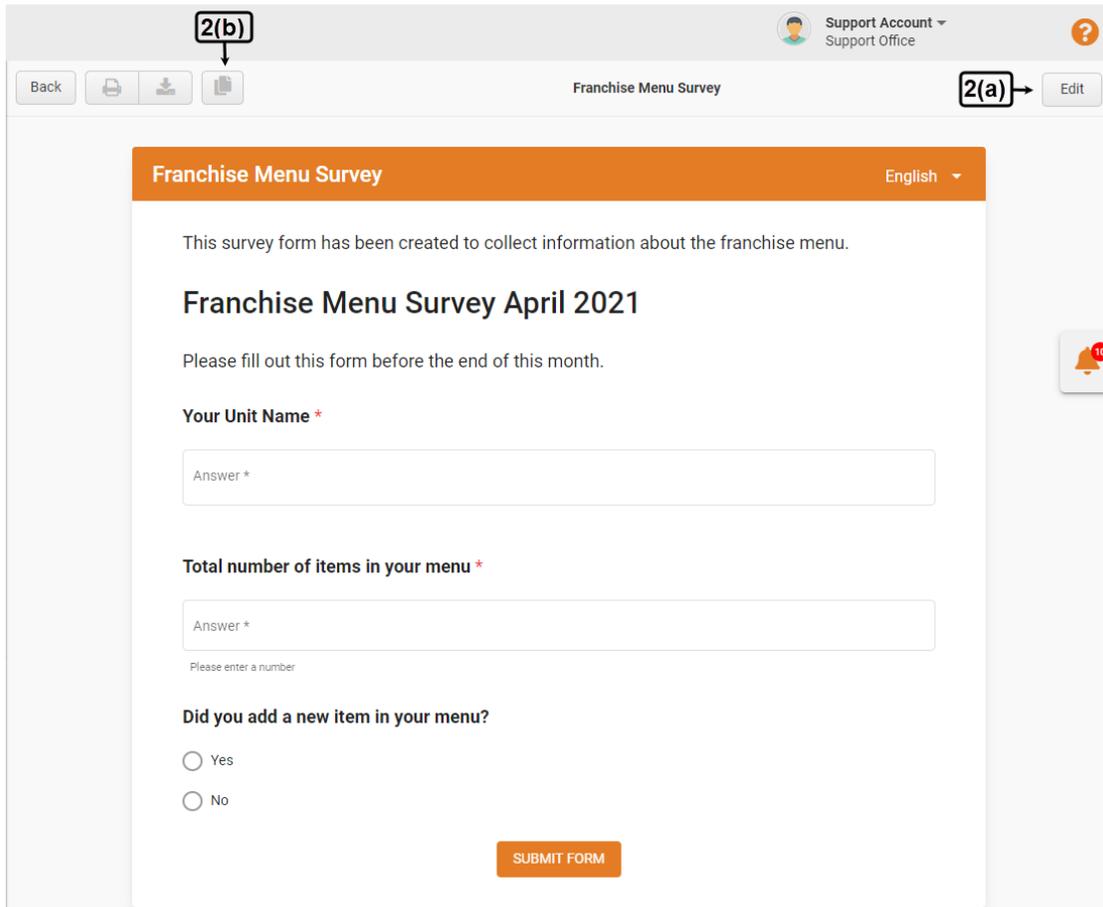


3. On the **Edit Form** or **Edit Copy of the Form** page, update the details you want to edit in the **Form**, **Conditional Logic** or **Settings & sharing** tab of the selected form.

**Remember**, you can't enable/disable the **Anonymous answers** option for a form to which at least one user has submitted an answer. You can enable/disable this option for the selected form only after deleting responses submitted to it. See the User Guide for **Delete Responses to a Form**

4. Review the **Preview** of the edited form.

5. Click the **Save** button in the top-right corner of the **Edit Form** or **Edit Copy of the Form** page to save all the changes you have made.

The system will save the updated form and share it with your selected colleagues.

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# Delete a Form

**Remember**, when you delete a form, this will also delete answers submitted to it and its report. You might want to stop sharing a form by editing its sharing settings instead of deleting it. See the User Guide for **Edit a Form**

Now, follow the navigation steps demonstrated below to delete a form and its report if you really need to do so.



1. Open the **Forms** page and go to the category relevant to the form you want to delete by following the navigation steps as demonstrated in the previous section. See the User Guide for **Review Saved Forms and Answers**

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2. **Check** the **checkbox** next to the name of the form you want to delete.

3. Click the **Delete** button above the list of forms.

4. Type the word "**DELETE**" in the field shown on the screen press the **CONFIRM** button to delete the selected forms and their reports.
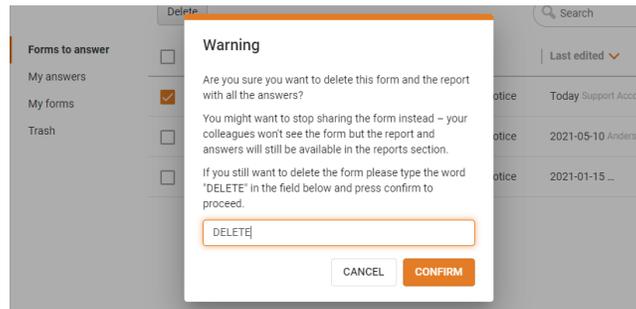


**Note:** When you **delete** a form, the system will move the deleted form, answers to it and its report to the **Trash** folder of the **Forms** module.

You can **restore** a deleted form and its relevant data from **Trash** later (if required). See the User Guide for **Trash**

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## Delete Responses to a Form

**Remember**, you cannot restore responses to a form and their relevant data in the **Reports** section once you have deleted them. Therefore, make sure you have saved any important data related to answers to a form before deleting them.

Now, follow the navigation steps demonstrated below to delete responses to a form if you really need to do so.

1. Open the **Forms** page and go to the category relevant to the form whose answers you want to delete by following the navigation steps as demonstrated in the previous section. See the User Guide for **Review Saved Forms and Answers**

2. Click the **Ellipsis (…)** next to the name of the form whose answers you want to delete.

3. Select the **Delete responses** option from the menu shown on the screen.
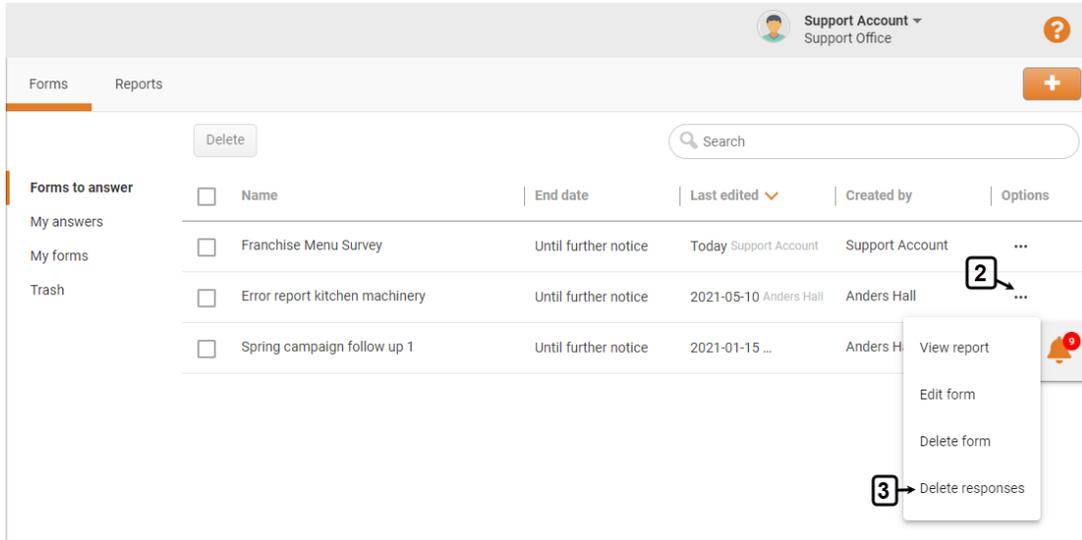
4. Type the word "**DELETE**" in the field shown on the screen and press the **CONFIRM** button.
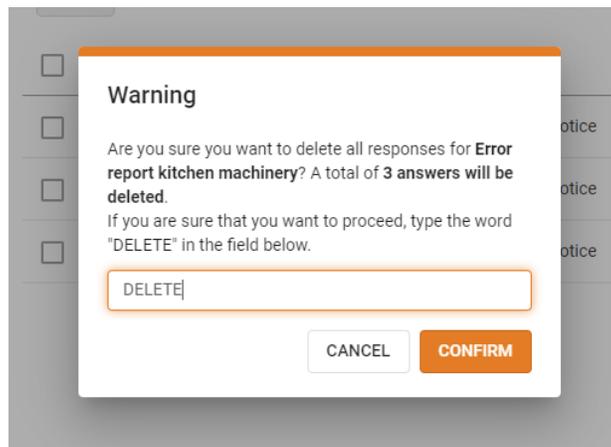


5. Enter the answer of the statement shown on the screen and click the DELETE RESPONSES button to delete the selected responses.
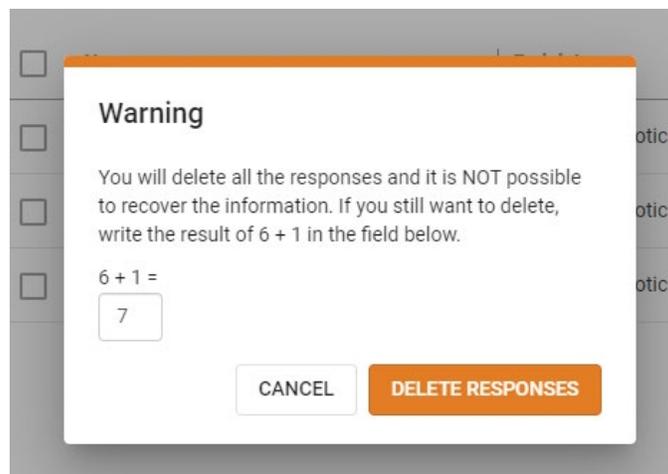
The system will delete the selected responses permanently and you can never recover this information.

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# Manage Forms in Trash

Every **Chainformation** platform has a designated **Trash** folder for the **Forms** module from where you can restore a deleted form or delete it permanently.

To **restore** a deleted form or **delete** it **permanently**, open the **Trash** folder on the **Forms** page and follow the navigation steps demonstrated below.
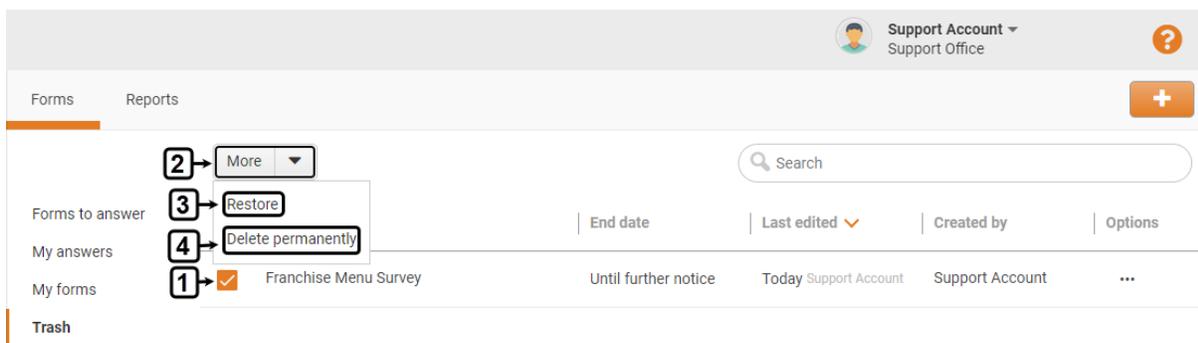


1. **Check** the **checkbox** next to the name of the form or forms you want to restore or delete permanently.

2. Open the **More** menu provided above the listed forms.

## Restore a Template

3. Select the **Restore** option in the **More** menu to restore the selected forms and move them

back to their respective category on the **Forms** page.

**Note:** When you restore a form, the system will automatically restore the responses to it and all

other related information in the **Reports** section.

## Delete a Template Permanently

4. Select the **Delete permanently** option in the **More** menu to delete the selected forms, answers to it and its report permanently.

5. Press the **YES, DELETE** button in the pop-up message shown on the screen to confirm your action.
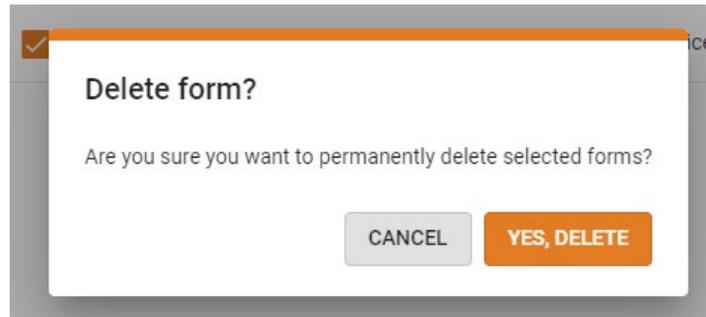


**Remember**, you cannot retrieve a template and the pages associated with it once you have deleted it permanently from the **Trash** folder.

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# Manage Reports

On the **Reports** tab of the **Forms** page, you can **view** and **manage** reports of forms created by you and your colleagues.

In this section, we will discuss the following features of the **Pages** module.

➢ View Saved Reports

➢ Review a Detailed Report

# View Saved Reports

Once you have opened the **Forms** page as demonstrated in the previous section, click the **Reports** button in the header menu of the page to open the **Reports** tab.

On the **Reports** page, you can view different reports under the following categories.
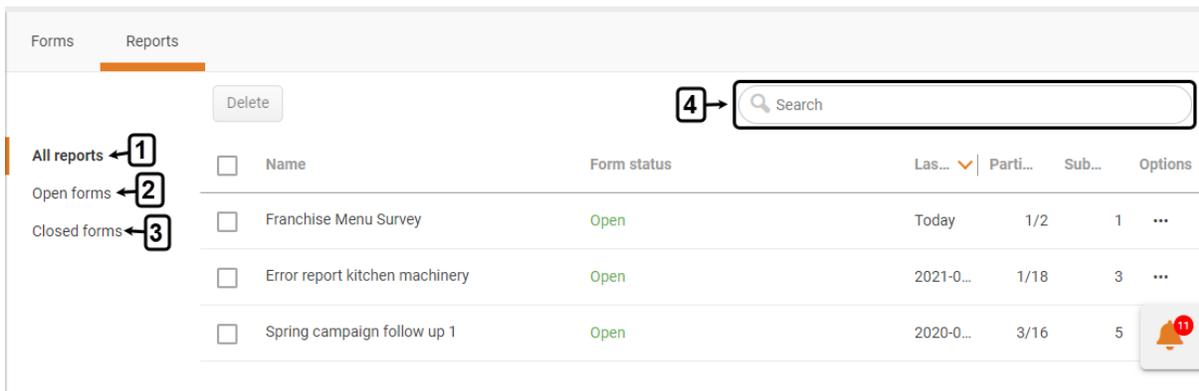


## 1. All reports

By default, you will be redirected to the **All reports** tab. This tab contains reports of all forms created by you and reports of the forms your colleagues have shared with you.

**Note:** You can see reports of the forms created by your colleagues only if the form creator has allowed you and other selected users to see their reports.

## 2. Open forms

This tab contains reports of the forms that are in open status. By **open status**, we mean the forms that have not been answered by all the users with whom the form creator has shared these forms.

## 3. Closed forms

This tab contains reports of the forms that are in closed status. By **closed status**, we mean the forms that have been answered by all the selected users.
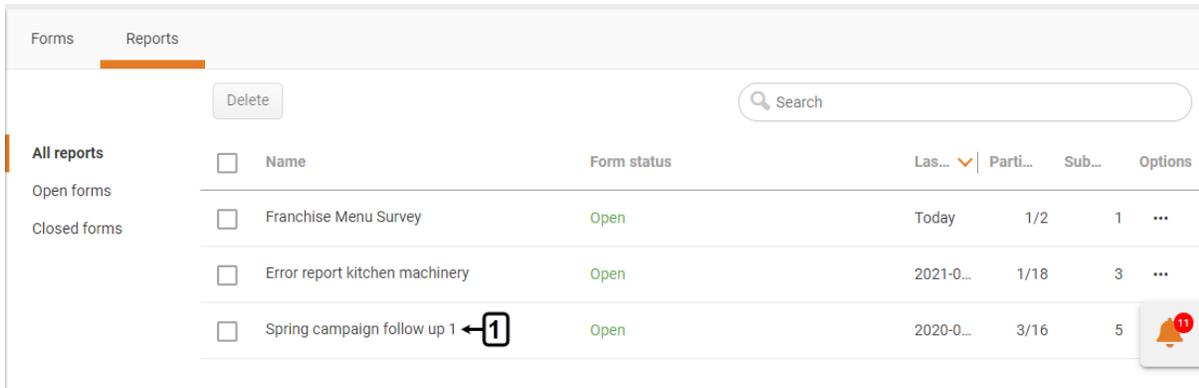
**Note:** Report of a form will be shown in the **All forms** tab but in no other tab if the form has not been shared with anyone or has passed its end date.

**4. Search a Report**

You can also use the **Search** field to find the report of a form based on any of the available data/information.  See the User Guide for **Search**

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# Review a Detailed Report

1. You can review the detailed report of a form by clicking its name in its relevant category on the **Reports** tab.



2. You can also open the report of a form directly from the **Forms** page.

2(a). Click the **Ellipsis (…)** icon next to the name of the form whose report you want to view.

2(b). Select the **View report** option from the menu shown on the screen to view the report of the selected form.

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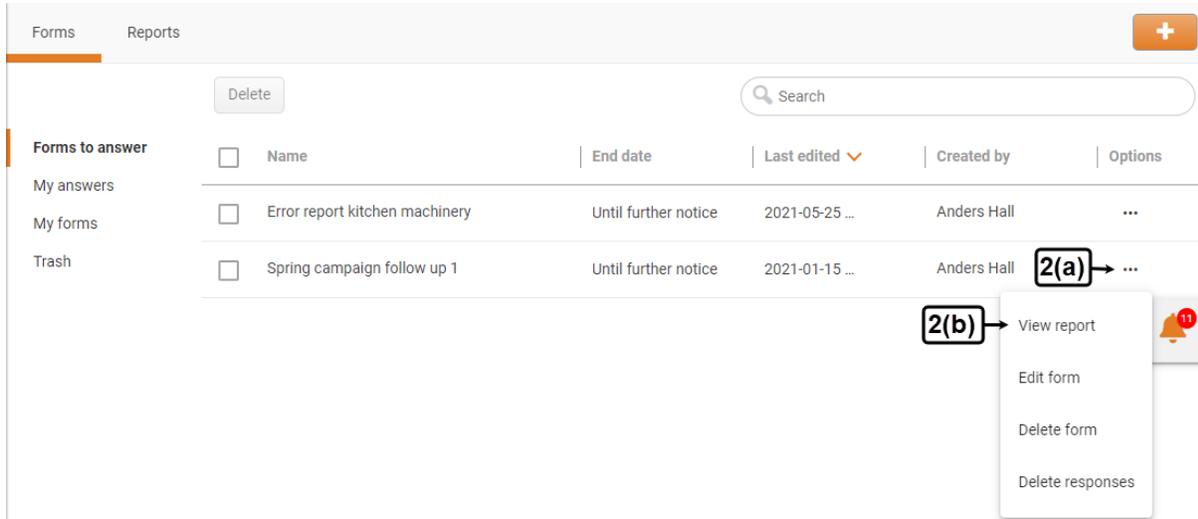
This will open the **Form report** tab of the selected form where you can review all the answers received to date, active colleagues, inactive colleagues and detailed statistics of each question.
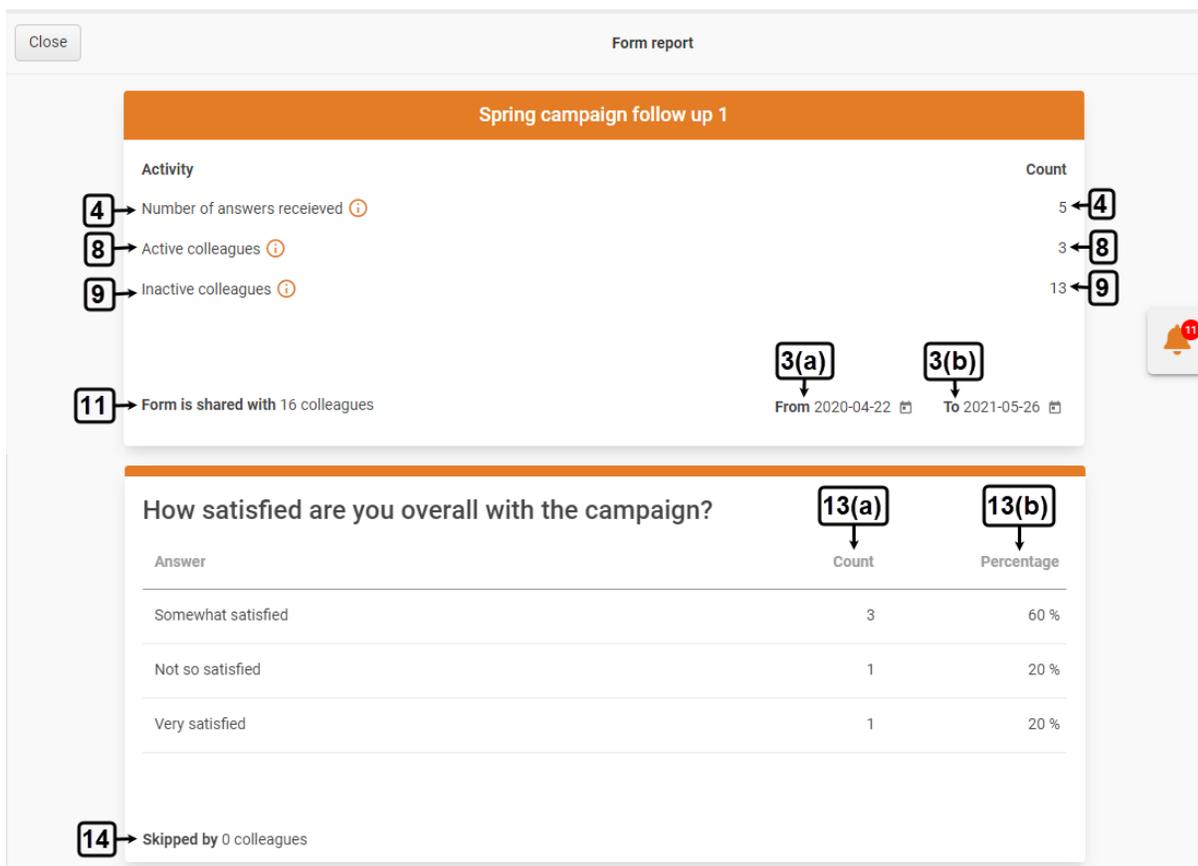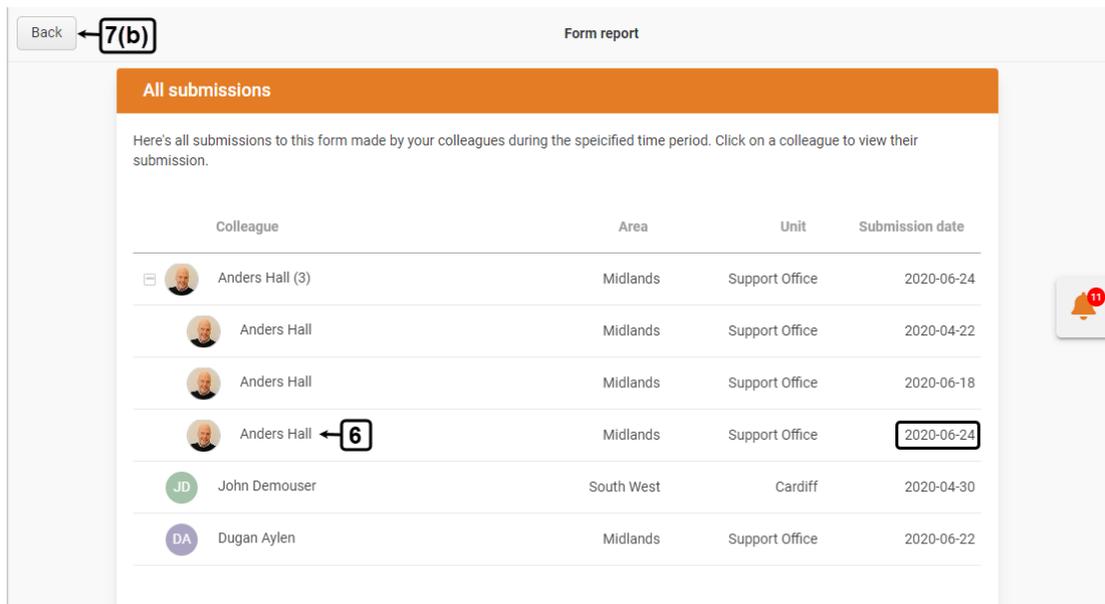


3. By default, the system will show you the statistics from the date when the form was shared with selected users to the date on which you are visiting the form report i.e. today. However, you can change this period by selecting an appropriate date in the **From** and **To** fields.

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4. Under the **Activity** section on the **Form report** page, you can view the total number of answers received in the specified period.

5. You can also view the names of colleagues who have submitted answers in the specified period by clicking the **Number of answers received** hyperlink.

This will open the **All submissions** tab where you can view details of active colleagues along with the submission date of each response.

**Note:** System shows no user data except the submission date of each response to a form if the **Anonymous answers** option is enabled for it. See the User Guide for **Create a New Form**
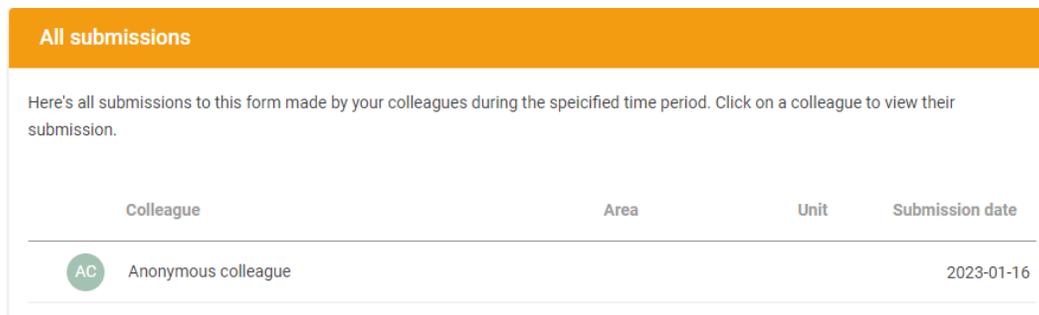


**Note:** System shows no user data except the submission date of each response to a form if the **Anonymous answers** option is enabled for it. See the User Guide for **Create a New Form**
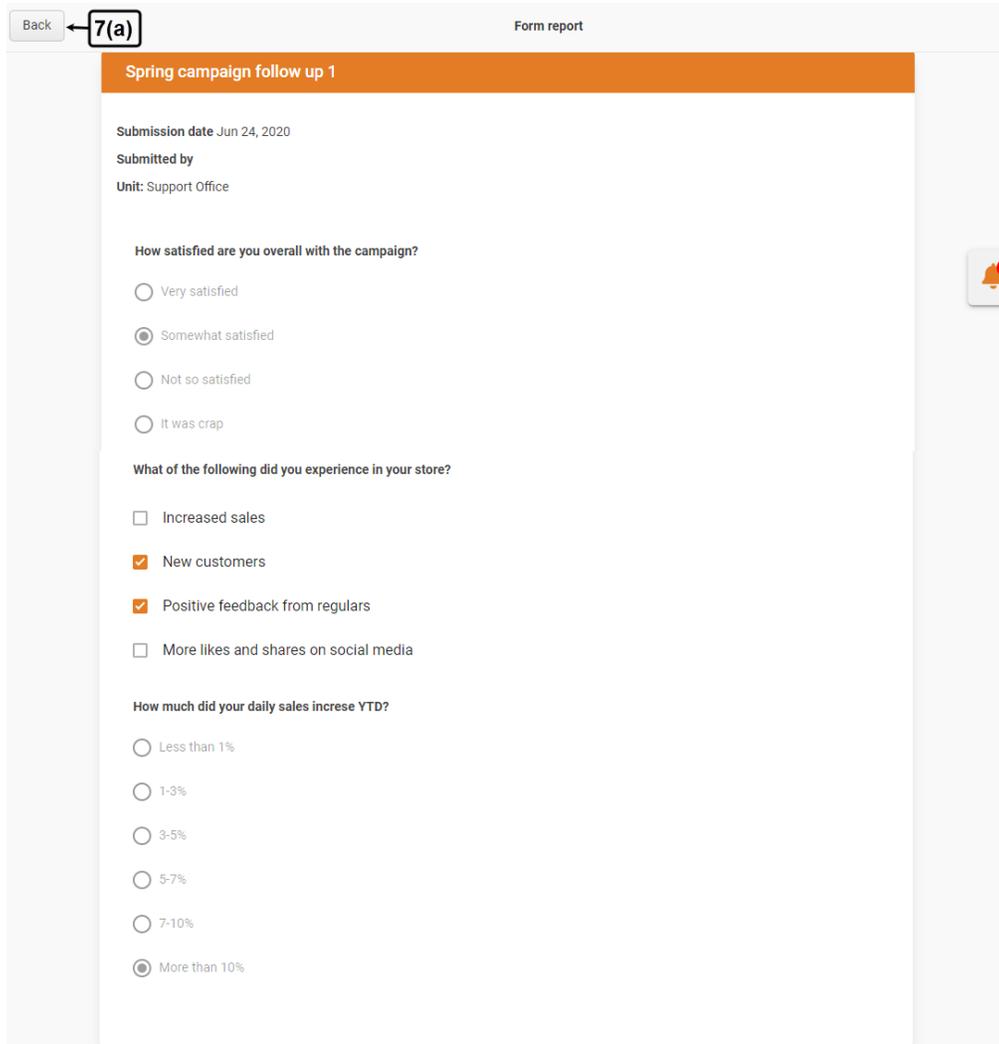


6. Click the name of a colleague to view their answer on the specified submission date.

7. Click the **Back button** in the top-left corner of the **Answer** and **All submissions** tabs respectively to get back to the **Form report** default page.

8. On the **Form report** page, you can view the number of active colleagues in the **Activity** section and their names by clicking the **Active colleagues** hyperlink.

9. In the **Activity** section, you can also view the number of inactive colleagues i.e. users who have not answered the form at least once and their names by clicking the **Inactive colleagues** hyperlink.

This will open the "**Who haven't answered this form?**" tab where you can view all the colleagues who haven't this form at least once.

10. On this tab, you can also **remind** selected or all inactive colleagues to fill this form.

11. Click the **Back** button in the top-right corner of the page to get back to the **Form report** default page where you can also view the total number of colleagues with whom the selected form is shared.

**Remember,** no user data about **active/inactive colleagues** will be available for a form under the **Activity** tab if the **Anonymous answers** option is enabled for it. See the User Guide for **Create a New Form**

12. Scroll down the **Form report** page to see detailed statistics of each question.

13. You can view the count of each response to a question and its percentage.

14. You can also view the number of colleagues who have skipped a particular question.

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## Email Responses to a Form

- The system will send a copy of each submission to a form created by you to your email address if you have opted to **send an email copy of submissions to form creator** in the **settings** of the form.
- Likewise, you will receive a copy of your submission to a form in your email inbox if the form creator has opted to **send copy of submission to participant** in the **settings** of the form.
- You will also receive email copies of submissions by your selected colleagues to a particular form if the form creator has opted to **send additional email copies of submissions to you** in the **settings** of the form. See the user guide for **Settings & sharing**

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Here is a sample email copy of the submission to a form that you may receive in any of the above-mentioned scenarios.

# Form submission

**Form:** Spring campaign follow up
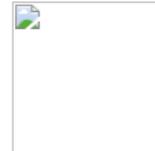
**Submitted by:** Dugan Aylen, Support Office, Midlands
**Time:** 6/22/2020 9:57 PM

**How satisfied are you overall with the campaign?**

- Very satisfied

**What of the following did you experience in your store?**

- New customers

**How much did your daily sales increse YTD?**

- 3-5%

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