Create an Applicant Event Registration Form

ACES² allows you to create Applicant Event Registration forms to gather information from applicants who are registering for your on-campus events. Applicant Event Registration forms are created directly with the recruiting event record with which they are associated, and you can have only one Applicant Event Registration form per recruiting event.

Forms will only update information regarding recruiting events in the applicant record. Within the recruiting event, the Total Registrants and Total Number in Party fields will be updated as forms are submitted by applicants.

These forms are distinctly different from the Prospect Inquiry forms in several ways:

- Information in an Applicant Event Registration form will not create a new applicant record.
- The form will only update recruiting event information; it will not update other information in existing applicant records in ACES².
- You can only use these forms with applicant records.

You can see responses to your questions in a spreadsheet within the recruit event or by viewing the applicant’s completed form, which is accessible through the applicant record. See the section called View Responses to an Applicant Event Registration Form on page 11.

Create an Applicant Event Registration Form

1. From the Search tab, select Recruit Events.
   - There is a new search field labeled Applicant Form. This field allows you to search for recruit events that already have an Applicant Event Registration form associated with them.
2. Enter your search criteria and select **Search** to find the recruiting event you are looking for. There are two new columns in this grid.

- The Form field allows you to add or edit a form directly from the Search screen by selecting **Add** or **Edit**.
- The Form Status field tells you the status of your forms.
  - “Saved” means a form was created and saved, but has not been published.
  - “Published” means a form has been created and published.
  - “Updated” means a form was created and published, and then edited after it was published.

By default, these columns will display on the far right side of your grid, but you can move them wherever you prefer.

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Form</th>
<th>Form Status</th>
<th>Applicants</th>
<th>Prospects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admitted Student Evening Event</td>
<td>Edit</td>
<td>Saved</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Admitted Student Event</td>
<td>Edit</td>
<td>Saved</td>
<td>0</td>
<td>44</td>
</tr>
<tr>
<td>Campus Visit Email</td>
<td>Edit</td>
<td>Published</td>
<td>436</td>
<td>6728</td>
</tr>
<tr>
<td>Waiting List Visit</td>
<td>Add</td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DC Forum</td>
<td>Add</td>
<td></td>
<td>142</td>
<td>5986</td>
</tr>
</tbody>
</table>

3. You can also create or edit forms within the event. Select the handshake icon next to the event name to open the event.

- In the Recruit Event section, you will see a new field labeled Registration Form.
- If there is no Applicant Registration form for the recruit event, you will see a link labeled **Add Applicant Event Registration Form**. Select this link to create a form.
- If there is an Applicant Event Registration form for the recruit event, you will see a link with the name of the form. Select the link to edit the form.
- You will see this field in both the open and expanded views.
4. Select the link to open the Applicant Event Registration form editor. This is where you will create your form.

5. To create a new form, select **Add**.

6. To copy an existing form, choose a form to copy from the Recruit Event Form drop-down menu and select **Copy**.

   • Your screen will display the Basic Form Information section.
7. You will see the following information:

- **Recruit Event:** This field is a reminder of the event for which you are creating your form. This field cannot be edited.

- **Form Description:** This is the ACES² description of the Applicant Event Registration form. This field is not visible on the form and is for your internal use only. Once the form is saved, you cannot edit this field. This field is required and will be the name used to identify the form when adding the field in an email to your applicants.

- **Title:** This is the title that will appear on the form. This field is optional.

- **Include School Name on Form:** When you check this box, you will include your school’s name on the form.

- **Available for Email:** This box must remain checked in order to send the form link to your applicants through the ACES² email system. To remove the form from the list of forms available to email once it is no longer applicable, edit the form and uncheck this box.

- **Logo Upload:** By default, your school’s standard logo will appear on the form. If you want to change the logo to something event-specific, you can upload a new one. (A preview of your logo is shown on the right.)

- **Expiration Date:** Set a date when the form will expire. This prevents applicants from registering for your event after the event has passed.

- **Recruit Event Action:** You can specify if the form will update the recruit event information in an applicant’s record or if it will add a new entry.
  
  - If the event does not exist in the applicant record, either option will add it to the record and mark the applicant as registered.
  
  - If the event already exists in the applicant record, choosing **Update** will update the date attended/associated and registration checkbox in the record, while **Add** will add a second entry for the recruit event.
  
- **Once you have made your Basic Form Information selections, select Save.** The screen will expand to show you the Instructions and Questions areas of the form.
8. Use the Instructions text editor to include any instructions on the form that you want your applicants to read.

9. Use the Questions editor to add or edit the questions that appear on your form.

   - The Number in Party question is included for all forms. You can edit or delete this question if you choose. If you choose to include the question and the applicant does not provide an answer, the default answer will be one.

   - Questions can only be deleted before the form is published.

These questions do not update any data in ACES². Read answers to these questions via spreadsheet, so you can ask whatever questions you choose without needing to choose data points contained within ACES². See the section called View Responses to an Applicant Event Registration Form on page 11 of this document.

- The Questions section gives you the following information for each question:

  - Active: Is the question currently displayed on the form? Questions cannot be deleted after a form is published. However, you can deactivate them if you decide not to use them in the future.

  - Question Number: Where in the spreadsheet does this question currently appear? See the section called View Responses to an Applicant Event Registration Form on page 11 of this document.

You can reorder the questions after publishing the form, but the question number in the form builder remains the same. Once published, this number tells ACES² how to correlate applicant answers to the selected questions in the spreadsheet.
• Short Description: You can provide a short description to identify what information the question is asking for.

• Required: You can require an answer to a question so that the applicant cannot continue without providing one.

• Answer Type: You can see what answer type the applicant will use for the question (text box, drop-down list, etc.).

• Max Length: This is the maximum character length for the answer. If you do not choose a maximum length, the default setting is 30 characters.

• Edit: Allows you to edit previously created questions.

• Delete: Allows you to delete questions. You cannot delete a question after the form is published.

10. Select Add to add a new question.

The Questions editor gives you the following information:

a. Description: Enter a short description of the question.

b. Question Text: Type in the question that will appear on the form.

c. Question Type
This drop-down menu allows you to choose from the following question types:

- **None**: Use this option if you are not asking a question but giving the applicant information.
- **Text box**: Gives the applicant a blank text box in which to enter their answer.
- **Drop down list**: Allows the applicant to select one answer from a list of options.
- **Multi select with checkbox**: Allows the applicant to select multiple options by checking multiple checkboxes.
- **Yes/No - Radio button**: Allows the applicant to choose one answer only.
- **Single check box**: Allows the applicant to answer by checking a check box.

Choosing **Drop down list, Multi select with checkbox**, or **Single check box** will expand your screen to allow you to create the answer choices that will appear for the applicant.

11. Use the toolbar at the bottom of the screen to create the answers.

- To add an answer, select the plus sign (+).
- To edit, select the pencil icon.
- To save, select the disk icon. Remember to always save after adding a question.
- To delete, select the trash can icon.
- To cancel, select the circle with a slash.
12. To choose which answers are active, select **Edit**. Inactive answers are not included on the form.

You can only delete answers before you publish the Applicant Event Registration form. After publishing a form, deactivate the answers you wish to remove from your form.

13. When you have finished creating or editing your questions and answers, you must select **Done** at the bottom right side of the screen to save your changes.

- Answers will appear in inverted order on your form (the first answer you add to the list will be the last answer listed on the form). Keep this in mind if you want answers in a specific order.

14. Once you have finished creating your form, you can use the toolbar at the top of the page for the following tasks:

- **Preview** the form. When you select **Preview**, a sample of your form with sample data will display.

- **Save** the form without publishing it.

- **Publish** the form.

- **Delete** the form. You cannot delete an Applicant Event Registration form once it is published.
Insert an Applicant Event Registration Form into an Applicant Email

For an Applicant Event Registration form to be completed by applicants, you must send them a link to your form using the email feature in ACES².

- The links are unique for each applicant and cannot be forwarded to another person to complete the form.
- In order for the form to be available in email, the form must be published.
- The Available for Email checkbox must remain checked.
- Each email can only include a link to one form at a time.

To include the form link in an email:

1. From the Reports section of ACES², choose an existing email or create a new one.
2. If choosing an existing email report, select Edit from the Reports section on the lower left of the screen.
3. In the lower right corner of the email editor, there is a new field labeled Add Event Form.
4. The Add Event Form button is inactive but still selectable. Select Add Event Form and choose the Applicant Event Registration form you want to include in your email. The button will become active.
5. Select Add Event Form to add the link to your email.
6. Select Save.
7. Select Run Report.

- When the email window opens, you can insert the link to your Applicant Event Registration form into your email.

8. Place your cursor where you want to insert the link, and select **Insert** from the menu.

9. Select the item beginning with **EVENTFORM** from the list to insert the link into your email.
a. Select **Test** to send yourself a test email.

b. Select **Send** to send the email.

c. Select **Save** to save your changes without sending.

d. Select **Cancel** to cancel your changes.

**Important:** Each applicant will receive a unique link to the form so that their answers are connected to their applicant records.

- You cannot forward the email to others to complete the event registration form.
- Applicants should not forward the email to others to complete the event registration form.
- If other applicants need to receive the link to your event registration form, you will need to send each of them an email containing their unique link to the form.
- Because the link is unique to each applicant, you will not see an active link if you send yourself a test email.

**View Responses to an Applicant Event Registration Form**

There are two ways in which you can review applicant responses to your applicant event registration forms:

- From within the recruit event
- From within the applicant record

Applicants can only submit their form once, so if they need to change an answer, they must call your admission office. An admission office staff member must edit the response within the applicant's record.

**View Responses from Within the Recruit Event**

1. From the **Search** tab, select **Recruit Event** and search for the relevant recruit event.

2. Select the handshake icon next to the event name to open the event.

3. Edit the Recruit Event section by selecting the pencil icon on the right-hand side.

4. In the Event Form subsection, choose the Report Recruiting Year you want to view, and select the **Report** button.
If no recruiting year is selected, data will be provided for all available years.

A spreadsheet will open that will give you a list of all applicants who have completed the form along with their answers.

**View Responses from Within the Applicant Record**

1. From the **Search** tab, select **Applicants** and search for the relevant applicant record.
2. Select the folder icon next to the applicant name to open the record.
3. Select the **Communication** tab.
4. Select the double chevron to expand the section labeled Recruit Events.
5. Find the row related to the Recruit Event which contains the form, and select **Edit**.
   - The window will expand to allow you to edit the applicant’s information.
   - Select **View/Edit Event Form Responses** to open the Applicant Event Registration form and see the applicant’s answers.
6. If you need to change an applicant’s answer, you can make changes here and select **Submit** to save your changes.

- Applicants cannot edit responses themselves after submitting the form.
- They must contact your admission office to change their answers.
- Any changes you make will update the data in the recruiting event spreadsheet.

**Assign User Rights for Applicant Event Registration Form**

There are new user rights associated with the Applicant Event Registration forms.

<table>
<thead>
<tr>
<th>RecruitEvents</th>
<th>Modify</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>RecruitEvents.Delete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RecruitEvents.ApplicantEventForm</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Attendee</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Billing</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Documents</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Event</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Materials</td>
<td>Modify</td>
<td>View</td>
</tr>
<tr>
<td>RecruitEvents.Shipping</td>
<td>Modify</td>
<td>View</td>
</tr>
</tbody>
</table>

Users will need Modify rights to create or edit Applicant Event Registration forms and will need View access rights to view the forms.

No users will have access to view or modify the Applicant Event Registration form without these rights. The ACES² administrator in your admission office will need to assign permission to appropriate staff members who create and manage Applicant Event Registration forms.