London Region of U3As

SHARED PRACTICE GUIDE 017 – ONLINE FORMS
Rev 01 draft

1.   INTRODUCTION

Shared practice guides (SPG) are a vehicle to share knowledge between the u3as in the London area. They are created by collating knowledge and experiences from those u3as. They are only a guide – what worked for one u3a might not work for your u3a. If in your experience something is wrong or you disagree with something, please write in to allow an update to be created and published. It's hoped these Guides will grow over time with more shared experiences.

2.   SCOPE

This particular SPG addresses the use of online forms. Particularly for a simple registration process. There are many software programs that provide this basic function and others that provide wider capabilities. These can be for pre-payment for attendance to an event or for completing a survey. The well known programs and there broad capabilities are:

Name	Functions		
	Registration	Payment Collection	Survey
Wufoo	Yes	Yes	
Google Forms	Yes		Yes
Eventbrite	Yes	Yes	
TicketSource	Yes	Yes	
SurveyMonkey	Yes		Yes

Therefore, to chose the system that is right or you, you need to be clear on what you want to do with the software.

3.   BACKGROUND

More u3as are looking for some digital method for registration or other objectives. This could be for registration for their Group meetings or other Events. But Forms can also be used for a variety of other objectives.

4.   LEARNINGS

This guide has been created based on the experience of LRU3A with using Wufoo and others having used Google Forms.

4.1.   Wufoo

There are different elements within Wuffo, a section to create a form and a section to analyse the "registrations" from the form.

Once a form has been created it is advisable to keep it as a template for future similar forms. E.G. Group coordinators network, Peer group Network, talks.

Once each form has been created then it can be duplicated as most of the information will be the same. What would need altering would be the timing of the new meeting, the bulk of the form

would still be relevant. Remember to alter the timing in 3 places and to save the form every time you make an amendment, even if it's only a little change.

u3a's can come and go and so it's always good practice to ensure the list of u3a is up to date. Some u3a can be confusing, is it South East London or London South East, so group the two names together. South East London (London South East) U3a in London add (Belsize Park) this simplifies it for members who are registering and gives you a more acute count of numbers registered within each u3a.

When creating the report ensure that the title is identical to the title of the form you just created

Once the form is complete, the report is set and the link to the registration, hyperlinked to an e mail, then test it all out by being the first person to register. Ensure the confirmation form (sent directly after registration) states the correct meeting and that the confirmation e mail also has the correct meeting on it. If not go back to the form and check the form setting, repeat until everything works correctly. If you have tried several times until it works there will be "extra" registrations on the report. You can delete these, but your ID number will not start at number 1, if you deleted 5 tests then the next number will be 6.
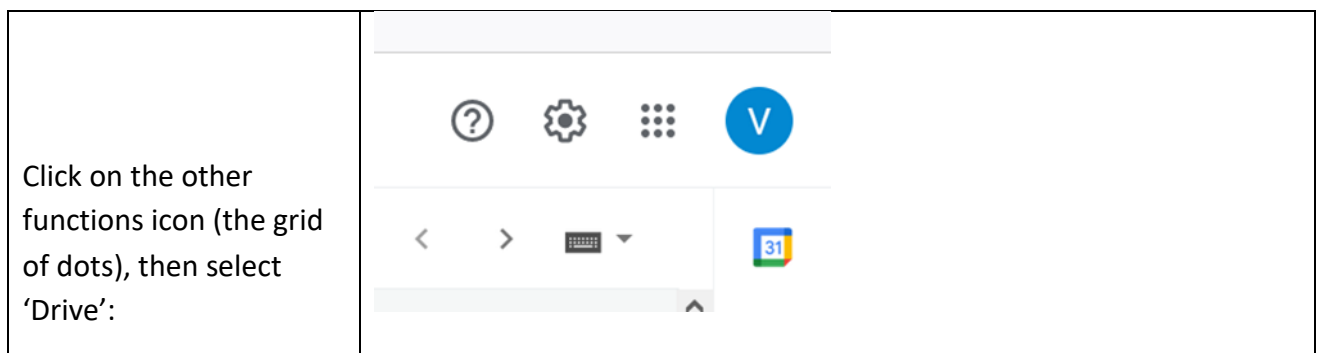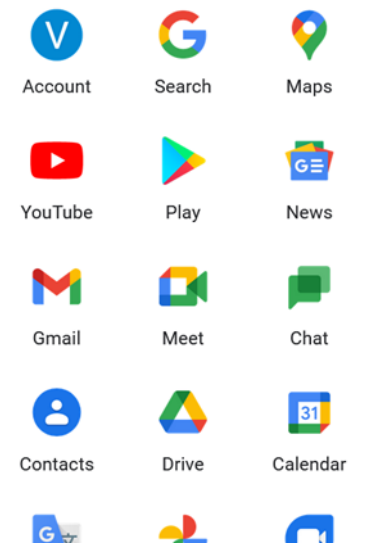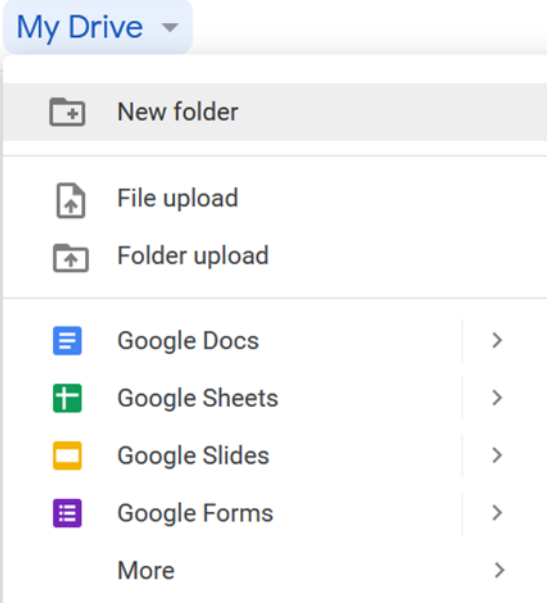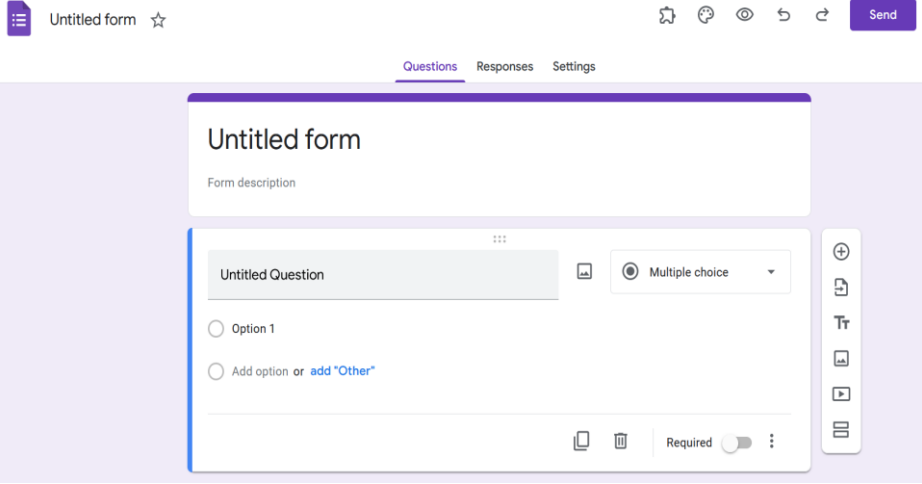
TO BE EXPANDED

4.2.   Google Forms

Google Forms can be used in various ways but most commonly are used for Registration (either for Groups, Events or Outings). They can also be used for surveys. They offer a way of automatically compiling a register (in MS Excel) of replies from a designed input sheet (or 'Form').

The basics are easy but there add on functions if desired that add further actions such as giving an automatic response to all inputs, completed Forms, provided or having automatic cut-offs when the event is full.

You need a Google account (eg gmail account) to be able to access 'Google Drive'. If for example you log into your gmail account, at the top right your will see:

Click on the other functions icon (the grid of dots), then select 'Drive':	

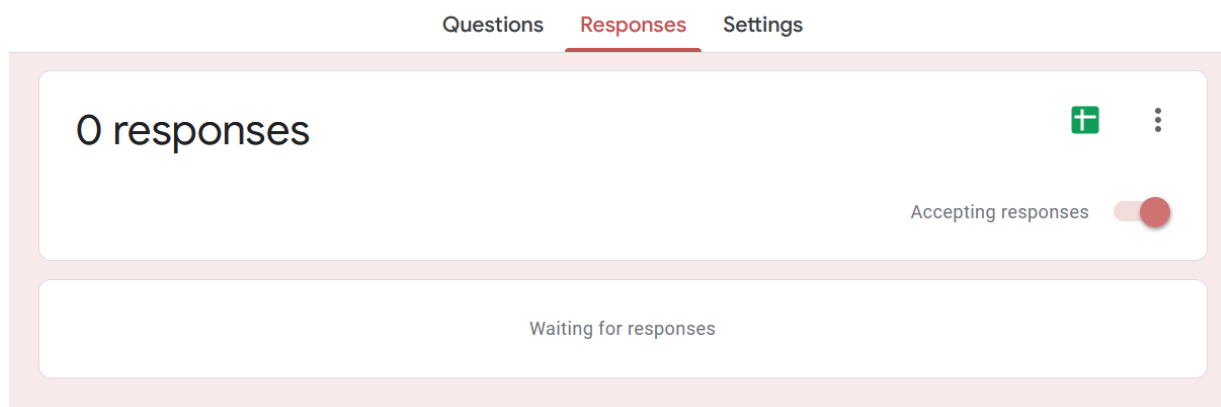|	
Drive is Google's cloud storage and each User gets 15GB of free storage.	
If you hover over 'My Drive' the range of activities or applications is listed. You want the purple one, Google Forms.	
If you click on the Form a blank form template will open:	

The first thing to do is to give the Form a title – this will become the Header and the filename.

One 'Untitled question' is shown and you can change that to your specific first question. There are various forms of answers that can be selected. If you want to set specific answer , a tick list, then type in your specifics as 'options'. If you want c

If you then click on the '+' on the right function bar, you can add another untitled question and then you can repeat the process by adding your specific wording. And so on for the number of questions you have.

Google Forms automatically save as you proceed. Once you are finished you can copy the web address/ the html internet address from your browser and paste where ever you want (eg on a website or in an email). Note: leave of the '/edit' bit of the address. This will allow people to click on the link and it will take them to this form. There are some additional features to customise your Form further but firstly to explain how to create the sign up Register. This is done in Google 'Sheets' but can be automatic from Google Forms.

In creating your Form (as described above) you have been on the 'Questions' tab of the Form. If you now click on the 'Responses' tab then this window appears:

You can then click on the green box and select 'Create Spreadsheet'. Every question you put in your Form will have a column. As people use the Form and 'submit' them their responses appear as a row. You can also 'Share' the spreadsheet with others so they can see the live register and responses received.

Other useful features available on Google Forms are: tailoring the auto response as each member completes the Form; and placing a limit on the number who can sign up for a particular event & tell them then that the event is full.

See References for further guidance.

4.3. TicketSource

This system is similar to Eventbrite but is simpler to use. An example:

The u3a Thames Valley Network started using TicketSource (www.ticketsource.co.uk/) when our Zoom talks became so popular that the tasks of dealing with emails and transferring the information to an Excel file became too onerous for the event organisers. TicketSource is free to use if the event is free - they take a small percentage if there is a charge. They handle cancellations and refunds (where relevant) and forward to the organiser any queries that it receives about the event.

For a paid-for event, TicketSource will send out the Zoom link.   If the event is free, the organisers will have to download the list of email addresses and send the links themselves.

The event organiser can log in to the TicketSource website and access two types of report - a Sales Report and a Questionnaire Report.   One or more questions can be asked as part of the booking process and the answers appear in the Questionnaire Report. The reports can be downloaded as a PDF, or as a CSV file which converts to Excel.

5.   REFERENCE MATERIAL

As always there is much online material available – either through the software providers own tutorials, or generally on YouTube.

6.   CONTACT POINT

This section will state if there are Members who have stated a willingness to be contacted for further explanation of the material in this Guide.