Form Application Manual

Version: 1.4

This manual briefly describes how to use the Form Application to create a form field containing all organisations who participate in the DiSSCo project or to export responses that are received upon your forms. Currently, the application supports both Google Forms and SurveyMonkey. Future refinement of these services and the addition of new ones like Cognito Forms is applicable.

Please read the general overview first, after that, choose the path of steps that corresponds to the service you are using.

Content

General overview

The Form Application is a simple web-application that allows users to manage DiSSCo related forms in an orderly manner because it links forms and their responses to organisations ROR identifiers. The way it does this is by adding an organisations field to a form. When respondents fill in the form, they will choose their respective organisation, which then is saved within the survey application. Next, when a form is due and the results are ready, they can be exported. During the exportation the Form Application links responses to the organisation's ROR identifiers and saves them by this identifier in the DiSSCo database. The responses can in the future be used by other services for analysis or visualisation.

The application is built on Google Apps Script, which is an online Javascript editor that supports seamless integration with Google Services (forms, sheets, etc.). The choice has been made to also integrate functionality for the other services (SurveyMonkey) in this editor. The current version of the application can be found at:

https://script.google.com/macros/s/AKfycbxyrQTvszdMh5nhtlQuj0aJHLVjXmhHvBQGse-T2alaNpVxMWFreSDSUMs2lWeZOZcf/exec

In order to be able to use the app, you will need to login with a Google Account.

In preparation of the Form Service, please follow the required configuration steps for SurveyMonkey when making use of this functionality.

SurveyMonkey Configuration

This chapter describes configurational steps that are required for making use of the SurveyMonkey methods within the Form Application. SurveyMonkey provides an API which we can use to modify our forms and thus insert an organisation field. However, it requires additional steps compared to Google Forms. These steps are not hard to execute, but make the process a bit cumbersome.

The deal with SurveyMonkey

In order to integrate the organisation application with SurveyMonkey, you will have to own a SurveyMonkey account, create at least one form and API application with your account. The latter may sound intimidating, but concludes nothing more than a view button presses that will be explained in the coming steps. Good to mention is that a free SurveyMonkey account has restrictions compared to the premium version. For the sake of this application it is not mandatory to upgrade to premium.

Note: When using the global DiSSCo account, you may skip this tutorial and use the following token: tOt-QCvM5tKO73Krcx3KwUC2mB8b-6-c4WV5BpfjFsSwGvfby2l489M4dsrtbVx9--lNb1VBc2MFECg1UGNJkB id1MVhE-jtlkmFc5Akvs.m9cPFtakWO2WfoLMmJAT7
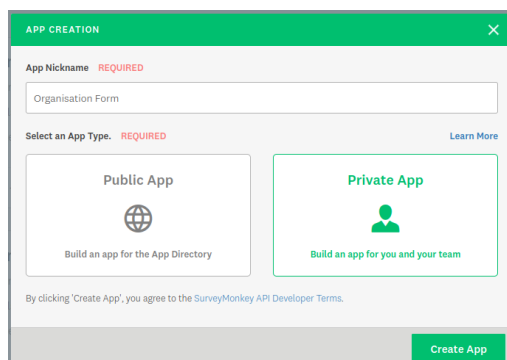
Configuration steps

Let's start with setting up the process inside SurveyMonkey.

1. First, login or create a SurveyMonkey account on: https://nl.surveymonkey.com

2. Now, create a new form or open an existing one. Click on 'My Surveys' and create/select your form. This should take you to a detailed page of the form itself.

Great! Now we have our form we can create an API application to use it codewise.

3. Navigate to: https://developer.surveymonkey.com/

4. From the top bar, select 'My Apps'

5. Click on: 'Add a New App'

6. Fill in a nickname for the app and choose for the Private App option

You will now be taken to a detailed page of your application. Here we can define several important settings in order to use this application as our API communicator.

7. Click on the settings tab and scroll all the way down

8. Open up the following scopes so all become green outlined, this will allow the application to access the required API functionalities. Click on 'Update Settings' when you are done.

|					
🔓	**Create/Modify Surveys**	Required	🔓	**View Surveys**	Required
🔓	**Create/Modify Collectors**	Required	🔓	**View Collectors**	Required
🔓	**Create/Modify Responses**	Required	🔓	**View Responses**	Required
🔓	**View Response Details**	Required	⊘	**Create/Modify Contacts**	Not Requested
⊘	**View Contacts**	Not Requested	⊘	**View Users**	Not Requested
⊘	**View Groups**	Not Requested	⊘	**Modify Groups**	Not Requested
⊘	**View Workgroups**	Not Requested	⊘	**Create/Modify Workgroups**	Not Requested
⊘	**View Workgroup Members**	Not Requested	⊘	**Create/Modify Workgroup Members**	Not Requested
⊘	**View Roles**	Not Requested	⊘	**Create/Modify Roles**	Not Requested
⊘	**View Workgroups Shared Resources**	Not Requested	⊘	**Create/Modify Workgroups Shared Resources**	Not Requested
⊘	**Create/Modify Webhooks**	Not Requested	⊘	**View Webhooks**	Not Requested
⊘	**View Library Assets**	Not Requested			Update Scopes

That's all. By configuring the SurveyMonkey application we can now use the API inside the Form Application. A couple of important things to remember:
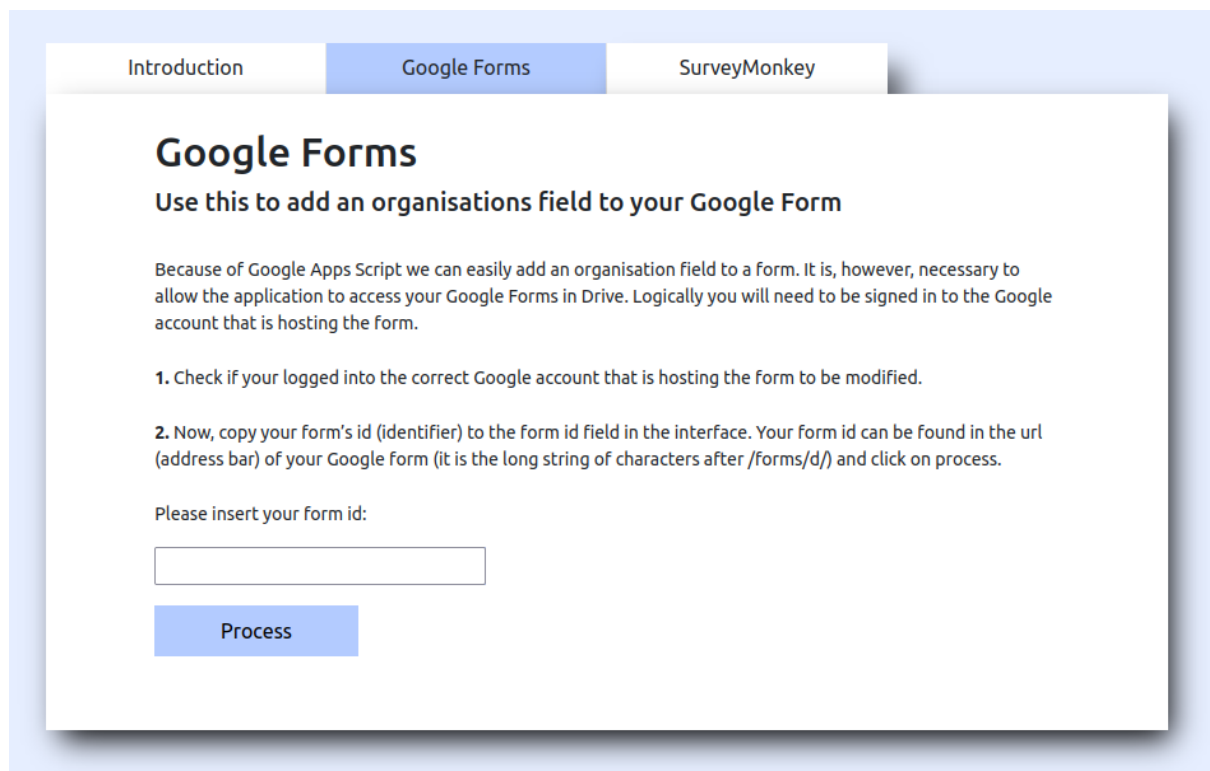
- This setup has to be only completed once in order to populate multiple forms with organisation fields
- Your application's state can remain like this for 90 days, whereafter it should be deployed, otherwise it will be removed by SurveyMonkey
- If your 90 days are over, just create a new application that copies all stats
- Deploying is not necessary to interact with the API
- The API can handle up to 500 API calls a day and 120 API calls a minute

Adding the organisations field to forms

On opening the application you will be shown a simple HTML interface. We will use this interface to integrate an organisation field in our form, whether this may be Google Forms or SurveyMonkey. Please continue reading this manual at the point relevant to your choice of Form Service.

Google Forms

Because of Google Apps Script we can easily use the Form Application to add an organisation field to a form. It is, however, necessary to allow the application to access your Google Forms in Drive. Logically you will need to be signed in to the Google account that is hosting the form.

Required steps

1. Open the Form Application.

2. Upon landing, you will be prompted to either login and/or confirm your Google account's forms to be accessed by the application. On encountering a security risk page, click on 'Advanced' and proceed to trust the source developer. This should redirect you to the interface.

3. First from the mode selector, click on 'Add organisations field' (this option is the default on loading).

4. Secondly, from the tab list choose 'Google Forms' to open the Google Forms section.

5. Now, copy your form's id (identifier) to the form id field in the interface. Your form id can be found in the url, as shown in the image below (it is the long string of characters after /forms/d/).

6. Finally, click on the 'Process' button. This will initiate the background process and add the organisation field to your form. Refresh your form's page to check it out.

SurveyMonkey

This requires you to have at least one form and API application within SurveyMonkey. If not, please follow the SurveyMonkey configuration chapter to set things up (***page #***).

Note: When using the global DiSSCo account, you may skip the configuration and use the following token:
tOt-QCvM5tKO73Krcx3KwUC2mB8b-6-c4WV5BpfjFsSwGvfby2l489M4dsrtbVx9--lNb1VBc2MFECg1UGNJkBid1MVhE-jtlk mFc5Akvs.m9cPFtakWO2WfoLMmJAT7

Using the Form Application we can implement an organisation field inside a form. The following steps will explain how to accomplish this goal. At first we need to collect some details about our SurveyMonkey form and API application and fill those in the application.

Required steps

1. Open the Form Application.

2. First from the mode selector, click on 'Add organisations field'.

3. Select the 'SurveyMonkey' tab from the tab list to open the SurveyMonkey section.

4. Fill in your SurveyMonkey application's authentication token. This will allow for using the API.

5. Press on the search icon, this will request all your forms and create a list of them in the next input field.

6. Select the form from the list that you want to add the organisation field to.

Optional: Define a page number. The page number specifies on which page of a SurveyMonkey survey the form field will be placed. The default value is: 1, which complies to page one and is the default for forms with only one page.
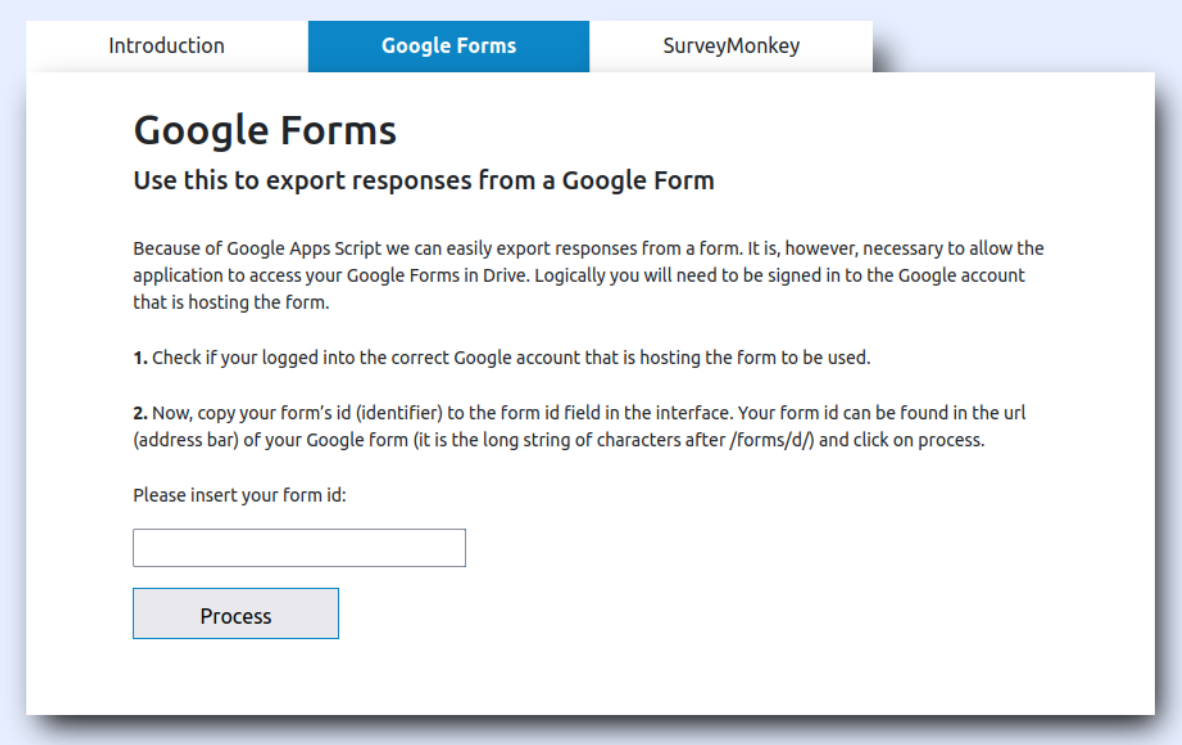
7. Click on the 'Process' button. This should add a fresh organisation field to your form. Check it out in your SurveyMonkey account!

Export survey responses

The Form Application allows you to export form responses that were received with Google Forms or SurveyMonkey. In particular, the service binds the organisation field, as described in the previous chapter, to the ROR-identifier of an organisation. This way responses are always identified by an unique id that refers to the organisation itself. Exported responses are then automatically saved inside the DiSSCo database for future usage. Is it possible to export the same form multiple times as the application will make sure to update the existing record inside the database.

Google Forms

Using Google Apps Script we can export a Google Form and save the responses in the document store (database). It is, however, necessary to allow the application to access your Google Forms in Drive. Logically you will need to be signed in to the Google account that is hosting the form.

Required steps

1. Open the Form Application.

2. Upon landing, you will be prompted to either login and/or confirm your Google account's forms to be accessed by the application. On encountering a security risk page, click on 'Advanced' and proceed to trust the source developer. This should redirect you to the interface.

3. First from the mode selector, click on 'Export survey responses'.

4. Secondly, from the tab list choose 'Google Forms' to open the Google Forms section.

5. Now, copy your form's id (identifier) to the form id field in the interface. Your form id can be found in the url, as shown in the image below (it is the long string of characters after /forms/d/).

https://docs.**google**.com/forms/d/1CXv2EemrDKZI3AVWTlw_m2UtSMQVAY_NefjjcWRHle4

5. Finally, click on the 'Process' button. This will initiate the background process and add the organisation field to your form. Refresh your form's page to check it out.

SurveyMonkey

This requires you to have at least one form and API application within SurveyMonkey. If not, please follow the SurveyMonkey configuration chapter to set things up (***page #***).

Note: When using the global DiSSCo account, you may skip the configuration and use the following token:

tOt-QCvM5tKO73Krcx3KwUC2mB8b-6-c4WV5BpfjFsSwGvfby2l489M4dsrtbVx9--lNb1VBc2MFECg1UGNJkBid1MVhE-jtlk mFc5Akvs.m9cPFtakWO2WfoLMmJAT7

Using the Form Application we can export responses from a SurveyMonkey form. The following steps will explain how to accomplish this goal. At first we need to collect some details about our SurveyMonkey form and API application and fill those in.

Required steps

1. Open the Form Application.

2. First from the mode selector, click on 'Export survey responses'.

3. Select the 'SurveyMonkey' tab from the tab list to open the SurveyMonkey section.

4. Fill in your SurveyMonkey application's authentication token. This will allow for using the API.

5. Press on the search icon, this will request all your forms and create a list of them in the next input field.

6. Select the form from the list that you want to add the organisation field to.

7. Click on the 'Process' button. This should export the form responses to the document store (database) and finish the process.

Troubleshooting

The Form Application is built and maintained by the DiSSCo developers. The tool is built in Google Apps Script and makes use of plain HTML, CSS (Bootstrap) and Javascript. The application communicates with the DiSSCo API to communicate with the DiSSCo database, see https://sandbox.dissco.tech/api/swagger-ui/index.html.

For troubleshooting or comments on this document or the Form Application, please contact Tom Dijkema at: tom.dijkema@naturalis.nl, or insert an issue in the GitHub repository: https://github.com/DiSSCo/DiSSCo-Form-Application.

Future updates might be provided to refine the process, add additional modes and make it more user friendly.