

Events and Forms

These are called 'actions' in Action Network jargon.

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What are event and forms for?

Events and forms are called 'actions' on Action Network.

Why use them?

They are a way of getting the subscribers on your list to interact and respond. Instead of sending them away from Action Network (e.g. to read a newspaper article or to sign up to a zoom) you keep them inside Action Network and therefore track responses.

You can use **forms** to do surveys, ask questions or collect more data on interests or skills.

You can use **events** for both in-person events with a physical location or for online talks, meetings, training etc.

If people fill in your form or event, you'll be able to see their response and learn more about the people on your list.

A list of useful [ready-made standard questions](#) are available for you to use.

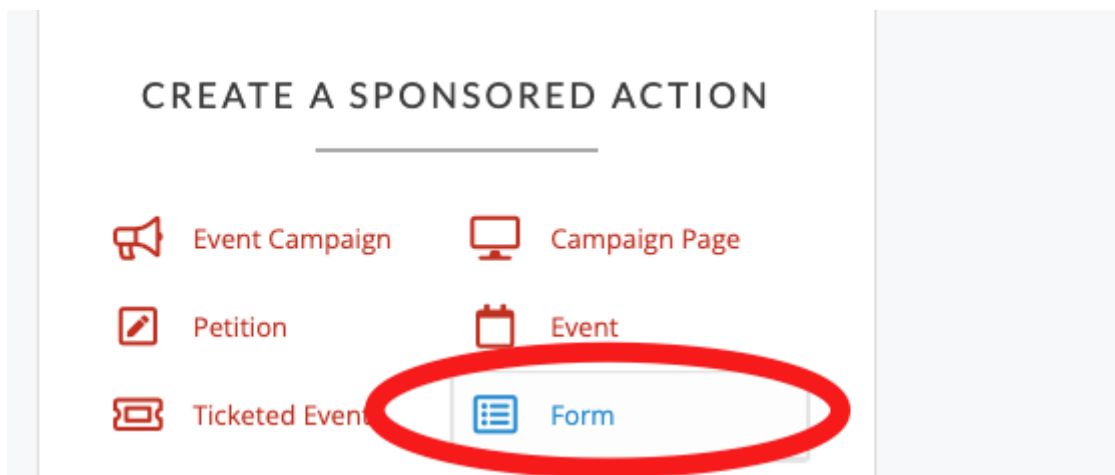
Creating a form

Forms are for collecting extra information or feedback from your list. E.g

- asking people if they are interested in certain ongoing activities like 'arts', 'action planning', 'social media support'.
- a general shout out for people with any time to spare (giving some options)
- registering their interest in distributing leaflets (you might collect their phone number so you could contact)

To start a new form - start here

From the **Create a sponsored action** menu on the right hand side, choose **Form**



To edit a current form - start here

Click on **Actions** then either **Manage** for a published form OR **Edit** for a form still in draft. Follow the same instructions below, but obviously some things may have already been set up.

Statistics **Actions** Emails Reports Activists Syndication Administrators Network Settings

Latest Actions ?

1 2 3

Event Test event [redacted]

1 Action Takers by [redacted]
Modified: 12/02/2023

Manage [icon] [icon] [icon]

Event Test event 1 Draft

0 Action Takers by [redacted]
Modified: 11/02/2023

Edit [icon] [icon] [icon]

1. Title and description

Give your form a short and clear title (and optionally a more descriptive different title for internal use only) and also a description/instructions written clearly for the person you want to fill in the form.

Edit Form: Administrative Title (Optional)

Title of your action *

ADD BANNER IMAGE (OPTIONAL)

HTML Format Align B I S Lists Image Video Table Link Line

Why is this important? *

2. More settings

You can let people know how many other people have taken the action of filling out the form by leaving the **Progress Bar** on, but usually this is turned off. Then you need a short **Form Heading** and at the is you can update the text that appears on the submit button depending on what kind of form this is. This could be e.g. 'Update', 'Submit Info' or 'Register'.

The screenshot shows a form configuration interface. At the top, there is a 'PROGRESS BAR' toggle switch, which is currently turned on (green). Below it, it says '0 Actions taken' with a question mark icon. A progress bar is shown with the text 'Only 25 more until our goal of 25' and an 'Edit' link. Below the progress bar, there is a 'Form Heading *' field, which is highlighted with a red circle. Below the heading field, there are four input fields: 'First Name', 'Last Name', 'Email *', and 'Zip/Postal Code *'. Each input field has a 'Sample' button next to it. Below the input fields, there is a link 'Not in the US?'. At the bottom, there are two links: 'Edit Form' and '</> Add Custom Form HTML'. At the very bottom, there is a submit button labeled 'Add Your Name', which is also highlighted with a red circle.

3. Edit Form

Then click **Edit Form** (as seen just above), which takes you to a drag and drop type page to add or remove questions from your form.

This part is hard to describe in words and images - so you need to just have a go. You can drag and drop any fields you don't want for your event (it's up to you). Just click on them and drag away from the left and let go.

In this example the surname and postcode have been removed and the GDPR field is being picked up and moved in to the form.

The screenshot shows a form builder interface. On the left, under 'Instructions', there are four bullet points: 'Add questions by dragging them from the right.', 'Edit questions by clicking on them below.', 'Delete questions by dragging them out of your form. Some questions (like email address) cannot be removed.', and 'Reorder questions by dragging them up or down in your form below.' Below this is a 'Your Form' preview with three fields: 'First Name', 'Email *', and 'Country *'. On the right, the 'Core & Custom Questions' panel is open, showing a search bar with 'gd' entered. A red circle highlights the search bar and the 'GDPR (GDPR_consent)' question below it. Other questions listed include 'Interest_Working_Group', 'Working_A&L', 'Working_Admin', 'Working_Arts', 'Working_Comm', 'Working_F', 'Working_Legal', 'Working_M&M', 'Working_Political', 'Working_RC', 'Working_RegDev', 'Working_Research', 'Working_TT', and 'Working_Talks'. At the bottom, the 'Blank Questions' panel shows options for 'Text Input', 'Text Area', and 'Radio Buttons'.

The fields can then be set to 'Required' if they are mandatory.

The GDPR consent field should always be set to 'Required'.

The screenshot shows a form builder interface. On the left, under 'Your Form', there are three fields: 'First Name', 'Email *', and 'Country *'. Below these fields is a consent statement: 'I give my consent to Extinction Rebellion to get in touch with me using the information I provide, for the purpose of news, actions and requests for volunteers and donations.' and a radio button labeled 'I agree'. On the right, a configuration dialog for the 'GDPR (GDPR_consent)' field is open. A red circle highlights the 'Required' checkbox, which is checked. Below it, there is an 'Always Show' checkbox, which is unchecked. The dialog also has fields for 'Show if the following field name:' and 'Has the value of:'. At the bottom, there are 'SAVE' and 'CANCEL' buttons, with 'SAVE' highlighted by a red circle.

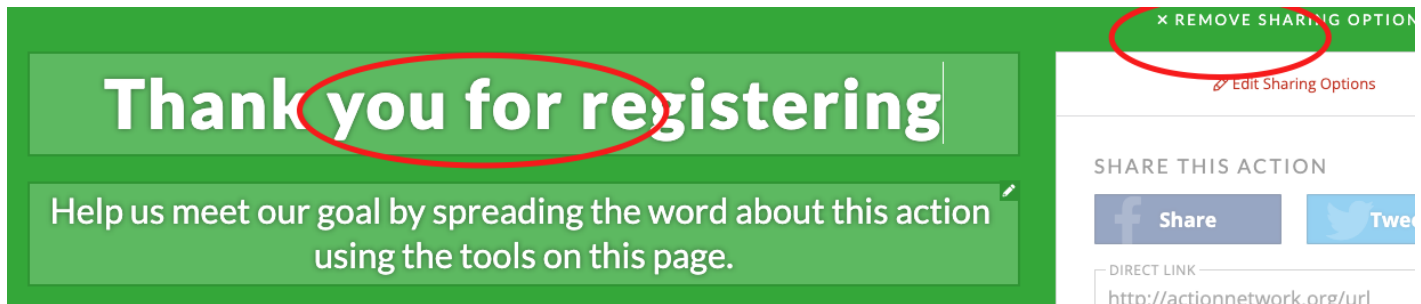
NOTE: Historically all admins could create questions and we've ended up with hundreds of questions with lots of overlap. So we are documenting a [list of some standard XRUK questions](#) that you can use.

You could also add your own questions at this stage, but note that the information will only be stored within the form answers, not with their activist record. It might be worth [requesting some training from the Action Network Data Team](#) to explain how all this works in more depth.

In the bottom right click 'SAVE AND PREVIEW' and 'SAVE AND GO TO NEXT STEP'.

4. Thank You page

To keep things simple - turn off the sharing options (you can investigate this later), and change the title to something that suits your form.



5. Write a short message

HTML Format Align B / S Lists Image Video Table Link Line

ADDITIONAL THANK YOU MESSAGE OR INSTRUCTIONS FOR YOUR ACTION TAKERS (OPTIONAL)

Thank you for taking the the time to update your information.

or

Thank you for taking this survey

or

Thank for volunteering for a role, we'll be in touch soon.

6. Click 'Save and Publish'

You form is now live, some last things to do are:

- add a nice page wrapper
 - The page wrapper gives your Event the 'XR Style' of font and colours and also this gets rid of all the Action Network branding at the top and bottom of the page. Swap from the default to the 'no logo' one.
- turn off or set up auto-reply emails (see next page)
 - Click on 'Responses'
 - As usual for an email - you might pick an appropriate wrapper ([contact data team](#) if you don't have the XR Wrappers), set up your subject, from and reply-to email correctly.
 - Click SAVE RESPONSES
- View your event and use the URL to get sign ups!

If you need help with setting up a Form, please book a training or coaching session via our [Training Request Form](#), or [contact the Action Network Data Team](#).

Online events

Guidance below focuses on events that point to a zoom link.

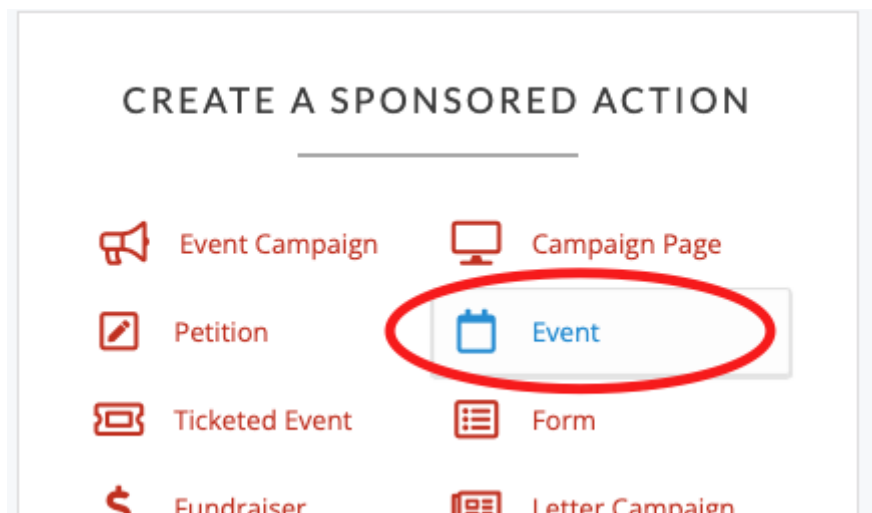
The zoom meeting link should be one that doesn't require the person to register (otherwise they'll end up having to register on the AN event AND again on the zoom link).

There are benefits to using Action Network *events* instead of sending people direct to a zoom registration. It enables you to easily see who has registered without having to download details from Zoom. Also it makes it easier to set up auto-reply emails, 24hr reminders and follow up emails.

This page covers how to:

- Create an Event (see below)
- Duplicate an existing Event - [watch this video](#)

1. Create an Event



2. Add the key details

Title, start and end time, zoom link and timezone

- title - keep it short and clear

- zoom link - this should NOT be a registration link (otherwise people will have to register here on the event and then again when they click the zoom)
- timezone - if your event date is within British Summer Time (then pick that time zone - see above) - otherwise choose Greenwich Mean Time.

TITLE OF YOUR EVENT *
 Heading for Extinction

☒ This Event is **Virtual**
☒ This Event Has An **End Time**

START DATE AND TIME *
 November 01, 2023 - 07:00 PM

END DATE AND TIME *
 November 01, 2023 - 08:30 PM

British Summer Time (GMT+01:00)

VIRTUAL EVENT LINK (OPTIONAL)
<https://zoom.us/meeting/xxxxxxxxxxx>

3. Add some short text about the event and upload graphic

Write something a little shorter than you might do on a Facebook event or other advert - because by the time they've reached this registration page - they should already know something about what they are signing up for.

EDIT BANNER IMAGE

HTML Format Align B / S Lists Image Video Table Link Line

EVENT DESCRIPTION *
This talk will change your life.
Wednesday 29 November 19:00 - 20:30 UK time
 The talk is 1 hour with 30 mins for Q&A
 Learn the truth about the climate and nature emergency and what we need to do.
 Have you met anyone unsure about the severity of the crisis, and the need to take action? If so, point them this way! After attending this compelling talk, clearly based on the underlying science, they'll be left

4. Then the graphic

Upload an image or banner below. Your image should be 1500px wide by any height (600px is suggested). It will be scaled to a final size of 750px wide.

 HfE.jpg

Image Attribution 


ALT TEXT

Heading for Extinction 

OKAY!

5. Update the form data entry details

Check the button to 'Register' and then click 'Edit Form'

PROGRESS BAR 

ATTEND THIS EVENT

First Name

Sample

Last Name

Sample


Email *


Sample

Zip/Postal Code *

Sample


Not in the US?


 Edit Form

 Add Custom Form HTML

☐ Allow Attendees To Bring Guests

Register





6. Choose data fields

This part is hard to describe in words and images - so you need to just have a go. You can drag and drop any fields you don't want for your event (it's up to you). Just click on them and drag away from the left and let go.

In this example the surname and postcode have been removed and the GDPR field is being picked up and moved in to the form.

Instructions

- **Add** questions by dragging them from the right.
- **Edit** questions by clicking on them below.
- **Delete** questions by dragging them out of your form. Some questions (like email address) cannot be removed.
- **Reorder** questions by dragging them up or down in your form below.

Your Form

First Name

Email *

Country *

Core & Custom Questions Edit

gd

GDPR (GDPR_consent)

Interest_Working_Group (Working_A&L Working_Admin Working_Arts Working_Comm Working_F Working_Legal Working_M&M Working_Political Working_RC Working_RegDev Working_Research Working_TT Working_Talks)

Blank Questions

T Text Input

TT Text Area

Radio Buttons

The fields can then be set to 'Required' if they are mandatory.

The GDPR consent field should always be set to 'Required'.

First Name

Email *

Country *

I give my consent to Extinction Rebellion to get in touch with me using the information I provide, for the purpose of news, actions and requests for volunteers and donations.

☐ I agree

☒ Required

☐ Always Show

Show if the following field name:

Has the value of:

SAVE CANCEL

NOTE: Historically all admins could create questions and we've ended up with hundreds of questions with lots of overlap. So we are documenting a [list of some standard XRUK questions](#) that you can use.

You could also add your own questions at this stage, but note that the information will only be stored within the form answers, not with their activist record. It might be worth [requesting some training from the Action Network Data Team](#) to explain how all this works in more depth.

In the bottom right click 'SAVE AND PREVIEW' and 'SAVE AND GO TO NEXT STEP'.

7. Thank You page

To keep things simple - turn off the sharing options (you can investigate this later), and change the title.

Thank you for registering

Help us meet our goal by spreading the word about this action using the tools on this page.

X REMOVE SHARING OPTION

Edit Sharing Options

SHARE THIS ACTION

Share Tweet

DIRECT LINK
http://actionnetwork.org/url

8. Also you can write a message here e.g.

Instructions For Your Attendees

HTML Format Align B / S Lists Image Video Table Link Line

INSTRUCTIONS FOR YOUR ATTENDEES *

Thank you for registering for the Heading for Extinction talk

Wednesday 29 November 19:00 to 20:30 UK time.

The talk is 1 hour with 30 mins for Q&A

Here's the Zoom link for the talk

<https://zoom.us/j/97382983438?pwd=WVBUM0hXWlhTSnJWNkFYUmFTZi9GUT09>

You will have received an email with this information and you will also get a reminder email the day before the talk.

We'll explain the science of the climate and nature emergency to understand the enormity of the

9. Click 'Save and Publish'

Your event is now live, some last things to do are:

- add a nice page wrapper
The page wrapper gives your Event the 'XR Style' of font and colours and also this gets rid of all the Action Network branding at the top and bottom of the page. Swap from the default to the 'no logo' one.
- turn the discussion board off
Click on Discussion and toggle off.

Page Wrapper: **2023 XR - no logo** SAVE PAGE WRAPPER ?

Instructions Statistics RSVPs **Discussion** Event Info Sponsors Responses

Sharing & Tracking Next Steps

Discussion Board ?

Discussion Board is Disabled ☐ X

- set up auto-reply emails (see following page)
 - Click on 'Responses'
 - As usual for an email - you might pick an appropriate wrapper ([contact data team](#) if you don't have the XR Wrappers), set up your subject, from and reply-to email correctly.

☒ **Send An Email Response**

i Activists taking this action via **web** will receive the **email autoresponder**.

Wrapper: **2023 - XRUK Talks and Training**

To: *[Activist Name]*

Subject: **Heading for Extinction (and what to do about it) TALK on ZOOM**

From: **XR Talks and Training**

Reply To: **eventsxr@gmail.com**

- Then write the content of the email. Some of the default things on offer aren't very clear, so here is an example of a clear email.

ENTER THE BODY OF YOUR EMAIL HERE *

Dear {{ FirstName | default: "Friend" }},

Thanks for registering to attend this **Heading for Extinction** talk.

Wednesday 29 November 19:00 to 20:30 UK Time

[Click here to join the Zoom talk](#)

{{action.calendar_buttons}}

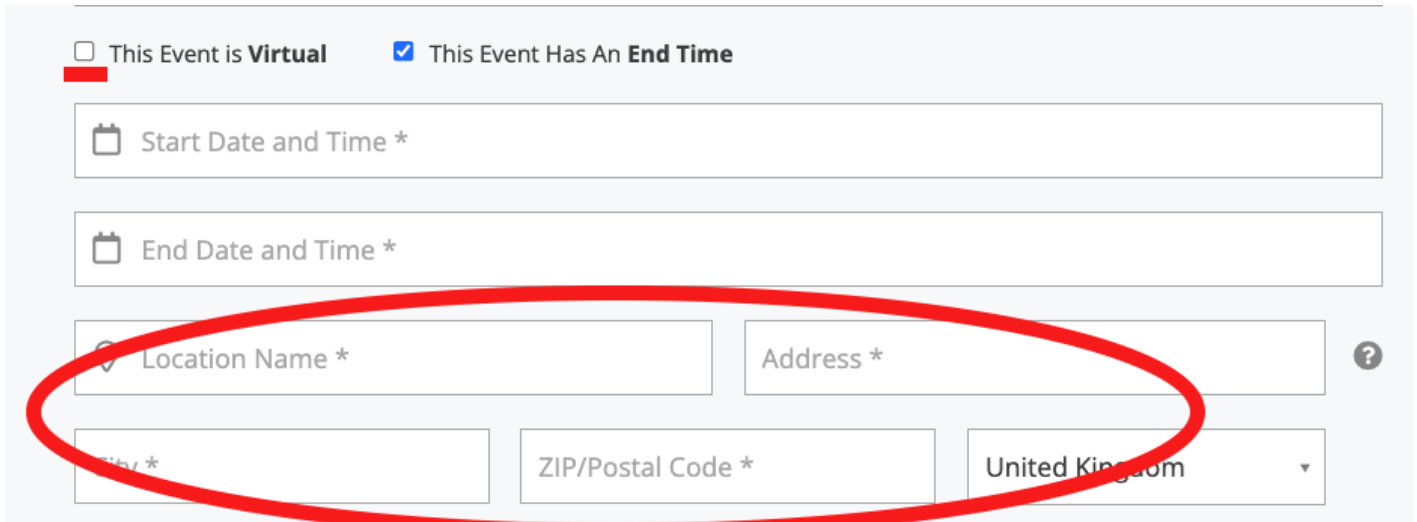
We look forward to seeing you!

Extinction Rebellion Talks and Training Team

- You can copy the same email or something slightly different for the 24hr before reminder email.
- Click SAVE RESPONSES
- View your event and use the URL to get sign ups!

In-person events

The guidance for creating an in-person event is very similar to [creating an online event](#) - but in step 2 you just need to give the physical location of the event.



The screenshot shows a form for creating an event. At the top, there are two checkboxes: "This Event is **Virtual**" (unchecked) and "This Event Has An **End Time**" (checked). Below these are two date and time input fields: "Start Date and Time *" and "End Date and Time *". A red circle highlights the location section, which includes a "Location Name *" field, an "Address *" field, a "City *" field, a "ZIP/Postal Code *" field, and a "Country" dropdown menu currently set to "United Kingdom". A help icon (?) is visible next to the address field.

If you need help on this, please book time on our [Training Request Form](#), or [contact the Action Network Data Team](#).

Useful fields and questions

All these questions are available to all groups using the the XRUK network

When you [use these questions in your forms/events](#) the data you collect will be added to subscribers record.

You can also create your own questions in a form or event, but these will just be held within the 'action' itself (this is more suited to temporary information e.g. to ask people what shifts they could cover when stewarding for an action with options of 12-2pm, 2-4pm, 4-6pm)

If you need help on this, please book time on our [Training Request Form](#), or [contact the Action Network Data Team](#).

Commonly used questions

If you have an idea for a question that could be useful system-wide then [get in touch](#). If you feel like you need the freedom to create your own questions, [read more here](#)

GDPR consent

Please include on every from and to 'required'. This adds **GDPR_Policy_V2** into a field called GDPR_consent.

Which Region

Drop down menu of options of every nation or region and an 'other/nomad' category too. Apologies for this question and field being just called 'region'.

Principles and Values

This give a link to the P&Vs on the website and asked for use to tick if they agree with them. Then it tags their activist record with **P&Vs_agreed**

Mattermost Handle

This is a free text field for someone to enter their mattermost handle.

...

(this page will have more information soon)