CAMPBELL UNIVERSITY
Leading with purpose

Online Form, Document, and Workflow Software Usage Policy for University Data Collection

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I. Introduction

As a vibrant and dynamic institution in a digital-first era, Campbell University requires the implementation of secure data collection and processing systems. In addition to systems maintained and hosted by Information Technology Services, third-party data collection solutions are also used to support the needs of the institution. This policy is intended to help guide campus users and administrators to use and manage these third-party solutions.

II. Recognized Third Party Form Solutions

Wufoo

Wufoo is a web application for creating online forms. The tool automatically builds the database, backend and scripts needed making it easy to collect and understand data. Wufoo was acquired by SurveyMonkey in 2011.

The university has a limited number of seats assigned to various campus departments.

Intended uses:

- ❒ Informal Data Collection:
  - ❑ Event Registration
  - ❑ Simple Data Collection
  - ❑ Short surveys
  - ❑ Committee Signups
- ❒ Basic form logic
- ❒ Campbell University branded form template
- ❒ 256-Bit SSL encryption of data
- ❒ No official workflow is required. No formal signatures or identity authentication needed.
- ❒ No collection of sensitive Personally Identifiable Information (PII) or PCI/Credit Card data.

Roles:

- ❒ Administrators - Administrators have access to all forms, reports, and data. Administrators also have the ability to manage users.

- ❒ Users - Users are limited to either forms and reports they have created themselves or any forms and reports in which they have been granted access by an administrator. Users are permitted to export and download all data entries from their forms. If a user leaves the institution, it is recommended that all Wufoo form access be transferred to another user.

To request a user seat, contact University Communications and Marketing. Seats may be assigned based on availability, intended use needs and number of seats already assigned to a department or school.

For instructions on creating forms and troubleshooting – please review the help materials on Wufoo.com.

Formstack

Formstack is a secure workplace productivity platform that lets organizations create digital workflows and integrations with no-code custom forms, create documents, and collect signatures.

Formstack users have a responsibility to protect the confidentiality, integrity, and availability of University information collected, processed, stored, or transmitted regardless of the location or medium on which the information resides. Information must be classified and handled in accordance with Policy ITS_003_V1.0 - Information Classification and Handling. Failure to abide by the Committee's Formstack Usage Policy or Policy ITS_003_V1.0 will result in a revocation of your Formstack license(s) and decommissioning of any developed forms and collected data.

The university has a limited number of seats currently assigned to the Registrar, Financial Aid, Bursar, Human Resources, Communications and Marketing, and Finance offices. Campbell does not have an enterprise license. Individual departments must purchase and pay for their own licenses and will be responsible to track usage, sign, license, and submission counts. If an overage is incurred, the department will be responsible for payment.

Intended uses:

- ❒ Forms needed for **official** processes of the University. (i.e., FERPA)
- ❒ When workflows require multiple signatures or approvals
  - ❑ All approvers must have a license

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- ❒ When SSO Authentication or ID Verification is required to acknowledge documents or statements and/or make the signature legally binding for a court of Law (i.e.: Student Financial Responsibility Agreement)
  - ❑ All participants/approvers must have an active Campbell account.
- ❒ When Personally Identifiable Information (PII) data is collected that requires secure encryption
  - ❑ 256-Bit Encryption of stored data, Individual forms and folders may be encrypted
- ❒ When documents need to be pushed into Onbase for retrieval via Colleague

Special Notes:

- ❒ PCI/Credit Card Information may **never** be collected via Formstack even though the solution has a field/option available for this.
- ❒ Salary and Social Security Number may **never** be collected by any department other than HR
  - ❑ Forms collecting Employee Data (outside of name and ID) need to be reviewed and approved by Human Resources prior to form publication.
- ❒ All contracts must go through Legal Counsel. Please contact Regina Calabro at rcalabro@campbell.edu for more information on the IntelAgree Contract Management Solution.

Roles:

Platform Administrator - Platform Admins allow the user(s) to invite users to the account, assign platform roles, add, and assign roles to new users to existing or trialing products, and edit account settings.

Folder Administrator – There may be an administrator over Form folders (i.e., Registrar's Office, Bursar's Office) who will have permissions to make edits to forms and users within their folder.

Basic User: users will be added to the Form, Document or Sign. Users will have permissions once assigned to a folder to create and edit forms.

Participant: Those who will be viewing/approving documents (i.e.: Deans, Dept. Admins)
There are 100 licenses. Individuals may approve unlimited docs or 1 doc and count as a single license for the month. If a participant does not approve any documents for the month, their license count will be zero.

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To request a user seat, submit the following form
https://campbelluniversity.formstack.com/forms/cu_formstack_license_request_wfss
Your request will be forwarded to your supervisor for approval, then it will be reviewed by the Institutional Formstack Committee. Seats may be assigned based on availability, intended use needs and number of seats already assigned to a department.

For instructions on creating forms, workflows, documents, and troubleshooting – please watch the webinars or review the help materials at: https://help.formstack.com/s/

For all other general survey, event registration, and other informal data collection needs, campus users are encouraged to use existing platforms like:

- ❒ Qualtrics
- ❒ Microsoft Forms
- ❒ Google Forms