Forms & Surveys

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Overview

Use Forms & Surveys to create:

- Faculty and course evaluations
- Alumni contact information
- School safety surveys
- Community surveys
- Employee surveys

- Needs assessment
- Registration forms
- Opinion polls
- Community and adult education surveys
- Online quizzes

Examples:

Page 1 of 2

Personal Information

1. Enter the following information: *
Enter at least 4 responses and no more than 4 responses.

Name:

Address:

Phone Number:

email:

2. Emergency Contact Information
Enter at least 2 responses and no more than 2 responses.

Emergency Contact:

Emergency Phone Number:

3. What grade are you in?
— None —

NEXT >>   X CANCEL

Lakepark SCHOOL DISTRICT   Food Services Survey

Page 1 of 1

1. How many times a week do you buy school lunch?
   ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

2. When you do buy school lunch, how satisfied are you with the food?
   — None —

3. What is your favorite school lunch meal?
   Check as many as apply
   ☐ Pizza
   ☐ Chicken Parmesan
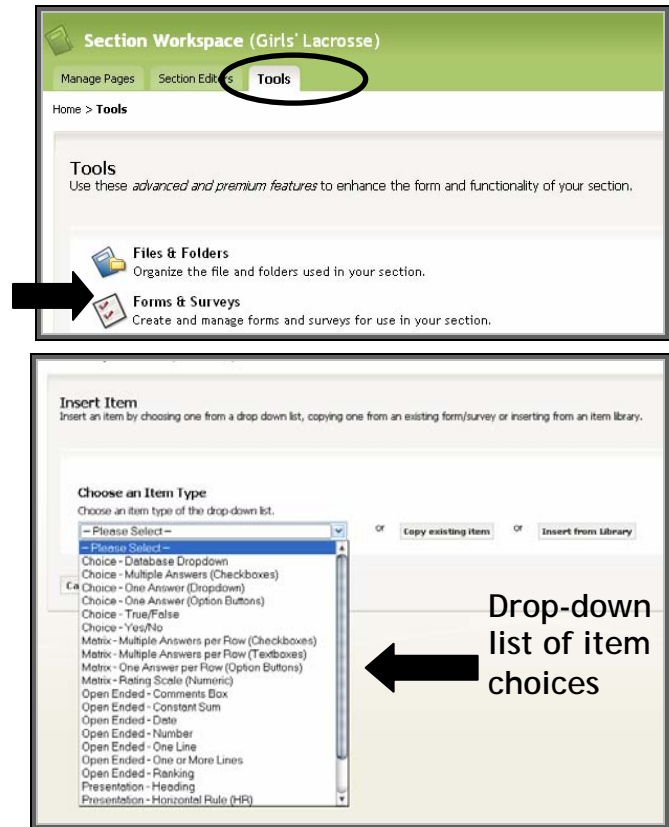   ☐ Spaghetti
   ☐ Meatloaf
   ☐ Hotdogs
   ☐ Other, please specify

   Done   Cancel

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How to Create a Form:

1) Access **Forms & Surveys** under the *Tools* tab in the *Section Workspace*. (Forms can also be created in the *Site* or *Subsite Workspace* and inserted onto a *page* by copying the URL for the form.)

2) Click on the *New Form/Survey* button.

3) Enter a title for your new form or survey and choose whether to design a new form or copy from an existing template. (Note: you will not be able to copy from an existing form until you have created at least one.)

4) Choose the *Insert* button to insert new items (questions or design elements) into the form or survey.

   (See Table 1 for a description of each item type)

Section Workspace (Girls' Lacrosse)

Manage Pages   Section Editors   **Tools**

Home > **Tools**

Tools
Use these *advanced and premium features* to enhance the form and functionality of your section.

Files & Folders
Organize the file and folders used in your section.

Forms & Surveys
Create and manage forms and surveys for use in your section.

Insert Item
Insert an item by choosing one from a drop down list, copying one from an existing form/survey or inserting from an item library.

Choose an Item Type
Choose an item type of the drop-down list.

— Please Select —   or   Copy existing item   or   Insert from Library

— Please Select —
Choice - Database Dropdown
Choice - Multiple Answers (Checkboxes)
Choice - One Answer (Dropdown)
Choice - One Answer (Option Buttons)
Choice - True/False
Choice - Yes/No
Matrix - Multiple Answers per Row (Checkboxes)
Matrix - Multiple Answers per Row (Textboxes)
Matrix - One Answer per Row (Option Buttons)
Matrix - Rating Scale (Numeric)
Open Ended - Comments Box
Open Ended - Constant Sum
Open Ended - Date
Open Ended - Number
Open Ended - One Line
Open Ended - One or More Lines
Open Ended - Ranking
Presentation - Heading
Presentation - Horizontal Rule (HR)

Drop-down list of item choices

5) Enter at least the required information in the item type. Click on the *Save* button. Your form will now display the first item entered.

6) Continue entering new items as you wish. You can do this by either of the following:

   - Click on the *Insert* button at the bottom of the page on which you are working. (See Figure 1). Using this method will insert an item at the end of the page.

Click on the Insert button to insert an item on this page.
Click on the New Page button to add an item here on a new page.

Insert

New Page

Figure 1

- Click on the *Insert* button beside an already created item. If you choose this method, you will be inserting an item above the current item.

Figure 2

7) Edit an item by clicking on the *Edit* button to the right of the question. Notice that you can also copy an item by clicking on the *Copy* button. (See Figure 2.)

8) Move items on a form or survey in one of two ways.

- Click on the *Move* button next to the item. (See Figure 2.) You will then be able to move the item anywhere in the form or survey.

- Click on the arrow buttons to the left of the item. This method will only let you move an item within that page.

9) Insert a new page for your form or survey by doing one of the following:

- Click on the *New Page* button at the bottom of the page on which you are working. (See Figure 1.)

- Click on the *Break* button next to the item. This will enter a page break above that item. (See Figure 2.)

10) Click on the *Pipe* button in order to take the answer from that item and place it elsewhere in your form. See below for an example. Figure 3 illustrates how the answers to previous questions in the form are inserted into a final page on the form. Figure 4 illustrates what the End-User will see after they have answered the questions.
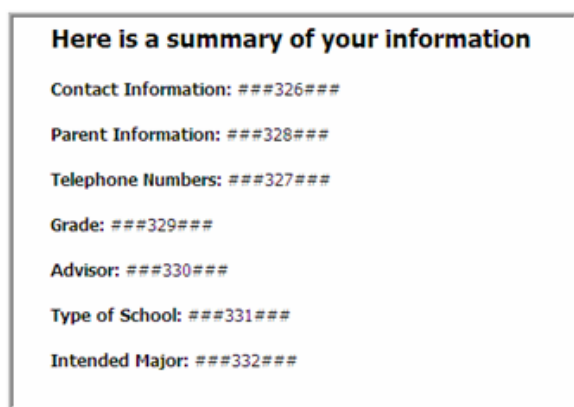

Here is a summary of your information

Contact Information: ###326###

Parent Information: ###328###

Telephone Numbers: ###327###

Grade: ###329###

Advisor: ###330###

Type of School: ###331###

Intended Major: ###332###

Figure 3: Presentation HTML using piping

Here is a summary of your information

Contact Information: Heidi Wall, 200 Innovation Blvd, State College, PA, 16803

Parent Information: Jennie Cline, Andy Cline

Telephone Numbers: 123-453-2345, 123-098-8763

Grade: 12

Advisor: Mr. Smith

Type of School: Urban, Suburban, Suburban

Intended Major: Science, Mathematics, Computer Science
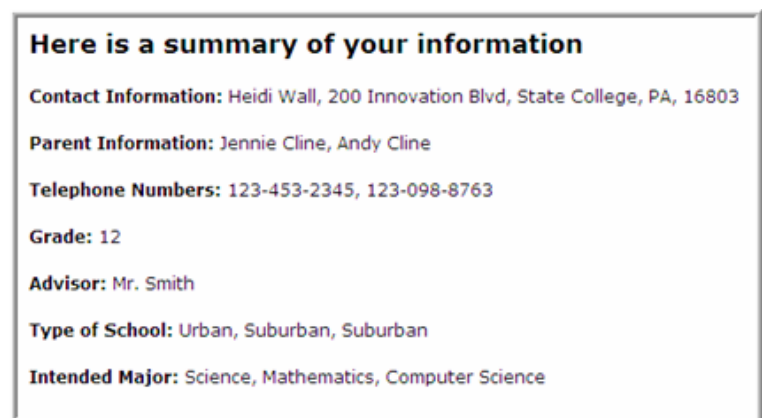
Figure 4: End-User View

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11) Title your pages by clicking on the *Edit Properties* button. Notice that you can also copy a page, move a page, or delete a page if you desire.
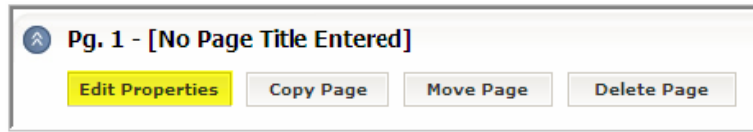

Figure 5

12) Enter conditions on pages by clicking on the *Insert Conditions* button if you are interested in displaying questions selectively. For example, if a user entered "yes" to a question on Page 1, a certain set of questions from Page 2 would display. On the other hand, if the user answered "no" to that same question on Page 1, a different set of questions on Page 3 would display. For more information on page conditions, see additional handout.
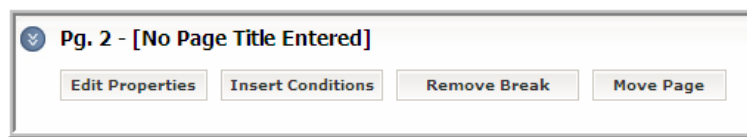
Figure 6

13) Click on the *Done* button at the bottom or top of the window when you are done with the form.

14) Preview the form by clicking on the title of the form or survey in the *Manage Forms & Surveys* window. You can actually test the form by taking it in this preview window.

How to Adjust Options for Forms & Surveys:

1) Click on the *Options* button next to the form or survey you are working on in the *Manage Forms & Surveys* window.

Figure 7

2) Click on the *Expansion Arrows* to the left of the headings listed below in order to adjust the given options.

   a. General Information

      i. Edit the title as required.

      ii. Choose a style. (The default style is automatically applied if a different style is not specified.)

      iii. Change status. (It must be *active* in order to be available to users.)

      iv. Control start and end dates. The end date must be in the future in order to have the form accessible.

   b. Respondent Level Access: Choose the number of times you will allow a user to fill out the form, whether a login will be required, and whether responses can be updated.

   c. Survey Completion Options

      i. Control what happens upon completion of the survey. If you choose "Display Results Immediately", the results overview will only display for the owners of the survey.

College Counseling Information Form

Manage options, status and styles for your form or survey using this form.

- General Information
- Respondent Access Level
- Survey Completion Options
- Navigation Options
- Hidden Fields
- IP Address Validation
- Numbering Options
- Administrative Options
- Contact Information

Save   Cancel

Figure 8: Options window

   ii. Choose *Redirect to URL* and fill in the *Completion URL* field to redirect the user to a certain page after filling out the form. By default, the browser will close after completing the form.

   iii. List persons to receive the responses to the surveys in the *Send To* field. You can enter multiple email addresses.

   d. Navigation Options: Choose buttons to be displayed (back, cancel).

   e. Hidden Fields: When a user enters information on your form or survey, you may save data stored in the cookies or the querystring. You may have this data be associated with each individual response. Configure these fields here.

   f. IP Address Validation: Restrict completion of survey to certain IP addresses.

   g. Numbering Options: Number pages and questions as desired.

   h. Administrative Options

      i. Control the total number of responses allowed for the survey in addition to the number of responses per person.

      ii. Control the number of days the survey is available for a person to edit responses.

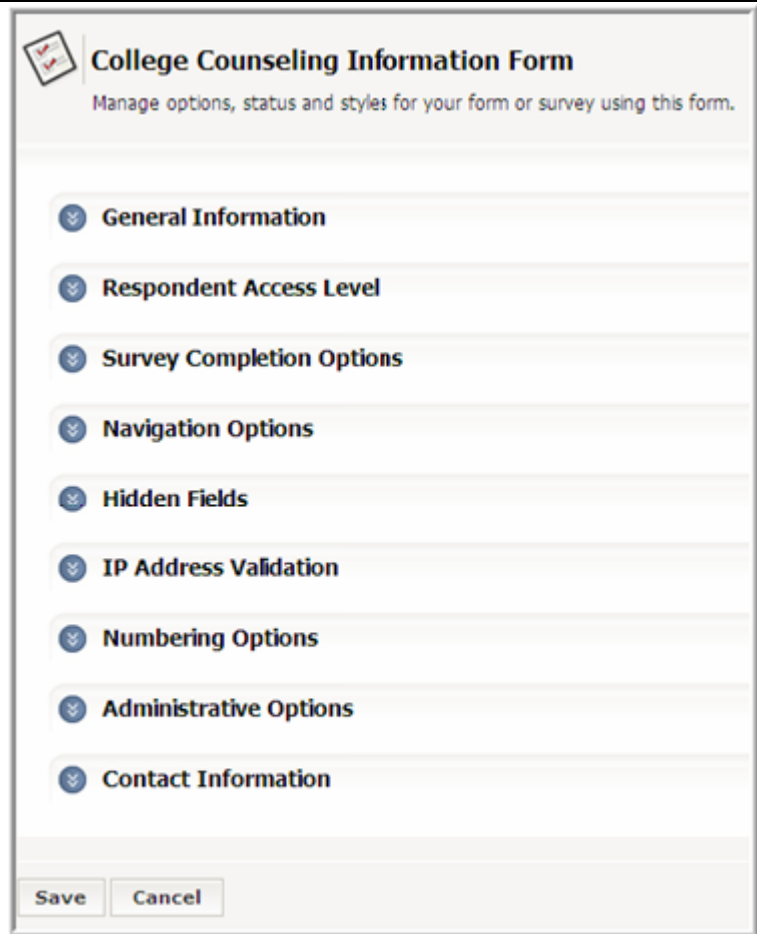   iii. Contact Information: List owners of the survey to allow others to have access to the results.

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How to make a form or survey available to complete:

1) Insert a link to a form on a *page* by choosing this icon in the **Editor**:

2) You can also insert a link to a form by obtaining the URL for the form. Do this by clicking on the preview of the form and copying the URL from the address bar.

How to Review/Access your data:

Access data from a form in one of two ways:

First method:

1) Click on the *Reports* tab in the *Manage Forms & Surveys* window.

2) Select the desired form or survey from the drop-down list.

3) View individual responses by clicking on the *Individual Results* button. You can also access individual responses by clicking on the *View* button next to the entry in the list of Individual responses.

4) View the overall results by clicking on the *Results Overview* button.

   a. Choose which data to display in the *Results Overview* window by selecting a choice from the *Display* drop-down menu.
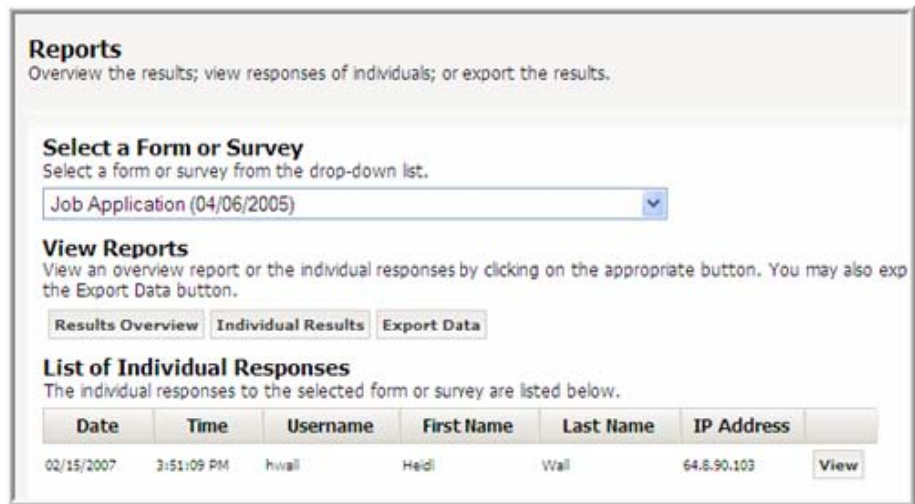
Reports
Overview the results; view responses of individuals; or export the results.

Select a Form or Survey
Select a form or survey from the drop-down list.

Job Application (04/06/2005)

View Reports
View an overview report or the individual responses by clicking on the appropriate button. You may also exp the Export Data button.

Results Overview | Individual Results | Export Data

List of Individual Responses
The individual responses to the selected form or survey are listed below.

Date	Time	Username	First Name	Last Name	IP Address	
02/15/2007	3:51:09 PM	hwall	Heidi	Wall	64.8.90.103	View

Figure 9

Results Overview
Display results; manage filters and report sharing.

Job Application

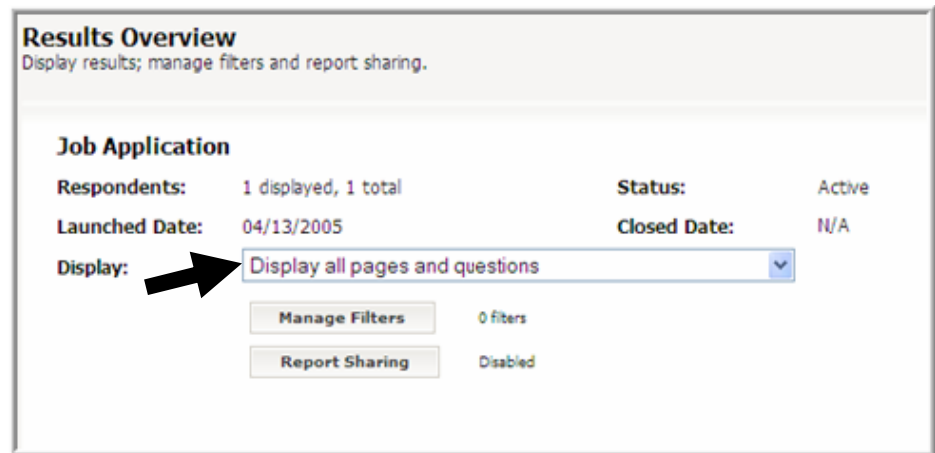| **Respondents:**	1 displayed, 1 total	**Status:**	Active
Launched Date:	04/13/2005	**Closed Date:**	N/A
Display:	Display all pages and questions		

Manage Filters   0 filters

Report Sharing   Disabled

Figure 10: Results Overview window

b. Click on the *Manage Filters* button to filter for results that match a certain criteria.

c. Click on the *Insert Filter* button to specify the data for which you want to filter. You may insert more than one filter. Uncheck the box next to the filter to inactivate it.
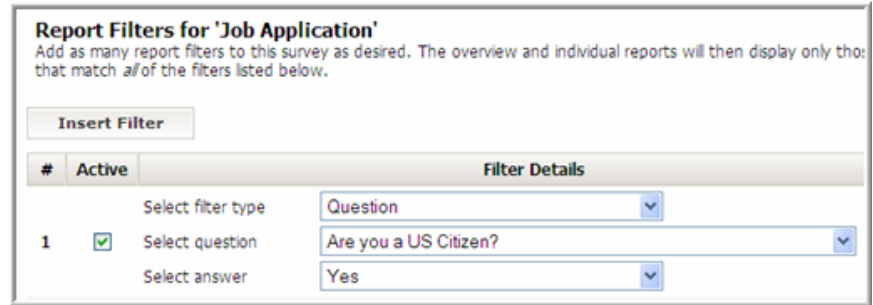
Report Filters for 'Job Application'
Add as many report filters to this survey as desired. The overview and individual reports will then display only thos that match *all* of the filters listed below.

Insert Filter

#	Active		Filter Details
1	☑	Select filter type	Question
		Select question	Are you a US Citizen?
		Select answer	Yes

Figure 11: Report Filters window

d. Click on the *Report Sharing* button in order to specify those with whom you would like to share Overview Results. You can share reports with others who do not have access to *Manage Forms & Surveys*, even those who are not editors on your website.

New Report Share

Report Sharing for 'Job Application'
Share reports with others without requiring sign-in.

Enable - Report sharing is currently **Disabled** for this form/survey.

Active	Email Addresses	Viewable Reports	Sent Date	
Yes	hwall@schoolwires.com	Overview Only		Edit Send Delete

Figure 12: Report Sharing window

5) Export Data by clicking on the *Export Data* button. Data will be exported to Microsoft® Excel®.

a. Choose the Data Format option that you desire. Be sure to think about the question types that appear in your form or survey. For example, if you have used an Open-Ended multiple line item type, you might want to choose SPSS (Statistical Package for the Social Sciences) format in order to put each line of data into its own column.

b. Click in the desired checkboxes if you wish to include additional fields of response and/or user data. The Username will be displayed when exported regardless of whether you check the box or not.

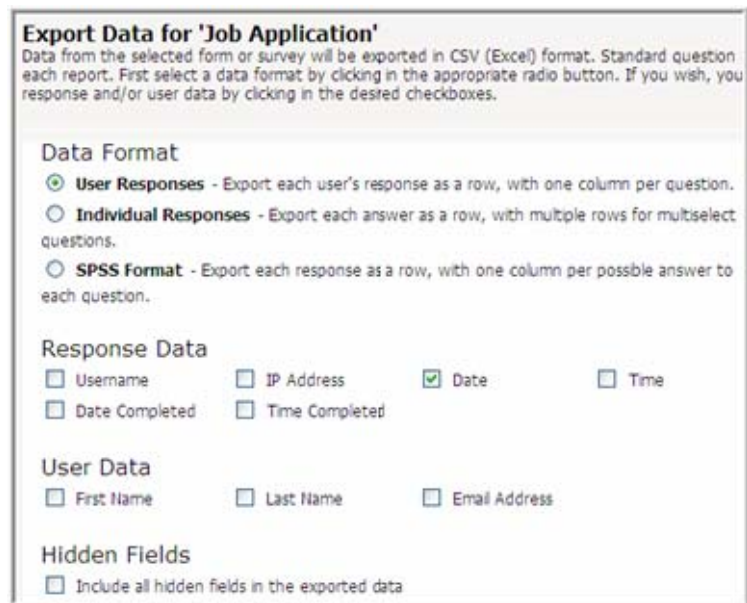c. Click on the *Export* button at the bottom of the window. Excel will display the data results.

Export Data for 'Job Application'
Data from the selected form or survey will be exported in CSV (Excel) format. Standard question each report. First select a data format by clicking in the appropriate radio button. If you wish, you response and/or user data by clicking in the desired checkboxes.

Data Format
- ◉ **User Responses** - Export each user's response as a row, with one column per question.
- ○ **Individual Responses** - Export each answer as a row, with multiple rows for multiselect questions.
- ○ **SPSS Format** - Export each response as a row, with one column per possible answer to each question.

Response Data
- ☐ Username   ☐ IP Address   ☑ Date   ☐ Time
- ☐ Date Completed   ☐ Time Completed

User Data
- ☐ First Name   ☐ Last Name   ☐ Email Address

Hidden Fields
- ☐ Include all hidden fields in the exported data

Figure 13

Forms & Surveys

Second Method: Click on the *Analyze* button next to the form to go directly to the Results Overview.

Figure 14

How to create styles for Forms & Surveys:

1) Click on the *Styles* tab in the *Manage Forms & Surveys* window. (Note: You must be a Site or Subsite Director in order to create styles).

2) Click on the *New Style* button to create a new style.

3) Title your new style. Choose to create an entirely new style or copy an existing style.

4) Click on the *Save* button.

Figure 15

5) Click on the *Expansion Arrows* to the left of the headings listed below in order to edit your style.

   a. General Information

      iv. Select *Yes* from the *Shared* drop-down menu if you would like other editors to be able to apply this style to their form or survey.

      v. Browse for a logo if you wish to add one to the top of your form or survey.

      vi. Select the desired alignment for the logo and the form.

      vii. Adjust the width of the form. Note: you may be restricted on how much you can control the width of the form if you are using certain question types like Matrices.

   b. Borders and Colors: Adjust the background colors of the survey along with the border color.
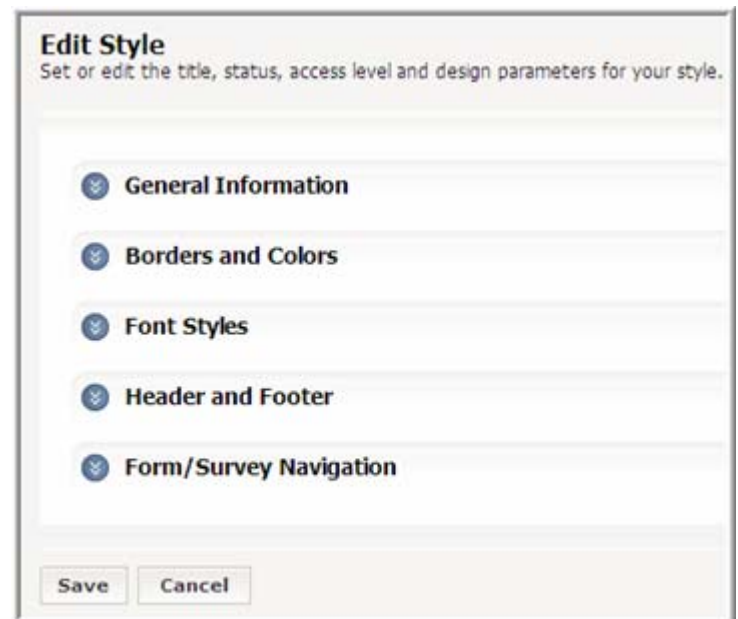

Figure 16

c. Font Styles: Select Font color, size, weight, and family for all text in the form or survey.

d. Header and Footer: Insert HTML code into the Header and Footer of the form or survey as desired.

e. Form/Survey Navigation: Upload custom buttons for navigation if desired.

How to create an Item Library

Item Libraries are collections of items (questions) that you can insert into a form or survey. (Note: You must be a Site or Subsite Director in order to create and save to Item Libraries).

1) Click on the *Item Library* tab in the *Manage Forms & Surveys* window.

2) Click on the *New Item Library* button to create a new Item Library.

3) Title it. Choose to make the Item Library Active or Shared. Making it active will make the items available for use and making it shared will allow other editors to insert items from the library into their forms or surveys. Click on the *Save* button.

4) Insert question types like you would when creating a new form or survey. These items will be saved for future use.

TIPS for Forms & Surveys

❖ For each type of question, you can choose whether to make the item required. Users will not be able to complete the form without answering those questions.

❖ Be sure not to enter too many items on one page. Create new pages and users can click *next* to view more items.

❖ When using piping, the piped answer must appear on a separate page.

❖ Status of form must be changed to *Active* once the design is complete in order to be able to use the form.

❖ You may not make extensive edits a form without deleting or exporting the data from the active form!!

Forms & Surveys

Exercise 1: Create a simple survey

1.) Sign in and access the **Site Manager**.

2.) Select *Forms & Surveys* from the *Tools* drop-down menu.

3.) Click on the *New Form/Survey* button.

4.) Title your survey (Heidi's Practice Survey). Leave the radio button at the default selection of "Create entirely new form or survey" and click *Save.* The form will open to begin adding items.

5.) Click the *Insert* button.

6.) Choose *Open-Ended - One Line* from the *Item Type* drop-down list.

7.) Enter the question "What is your name?", the question alias "Name" (this will be used as your column heading in exported reports), and the subtext "Please enter your full name." to explain your question further.

8.) Click on the *Save* button.

9.) Click on the *Insert* button under your first question.

10.) Choose *Choice - One Answer (Option Buttons)* from the Item drop-down list.

11.) Enter the question: "Which of the following animals is the Penn State mascot?", the question alias "Penn State Mascot" and the subtext, "Do not leave this question blank."

12.) Click in the required box to make the question required.

13.) Enter the answers. (Bear, Panther, Lion, Bobcat)

14.) Click on the *Done* button.

15.) Click on the *Options* button in *Manage Forms & Surveys* window.

16.) Click on the *Respondent Access Level* expansion arrow. Select option 6: *Multiple Response, Anonymous Access Allowed (Not Updateable).*

17.) Click on the *Done* button.

Forms & Surveys

Exercise 2: Put your survey on a page

1.) Create a new page or chose an existing page.

2.) Place your cursor whether you would like the link to the form or survey to be. Type in some text that will become the link to your survey (it could just be the same as the title of your survey).

3.) Click on the *Insert Form Link* icon in the **Editor**.

4.) Select your survey from the drop-down list.

5.) Choose *Open in New Window* for the target.

6.) Click on the *Insert Link* button.

7.) Click on the *Save* button.

8.) View the page on the End-User website. Take the survey**!**

Exercise 3: View the results of the survey

1.) Access **Forms & Surveys** from the *Tools* menu.

2.) Click on the *Analyze* button to the right of your survey. (This takes you to the Results Overview area of reports).

3.) Under the *Display* menu, choose what you would like to view.

4.) Click on the *Manage Filters* button. Click on the *Insert Filter* button. Choose one of the options from the drop-down menu: you can filter out responses by date, user, question, or even something custom that you choose. Select one and click *Save All*.

5.) Click on the *Reports* Tab to view the list of results. View the individual results report. Note that this is where you export the data.

Forms & Surveys

Exercise 4: Create another survey

1.) Try and recreate one of the following surveys. Use your handout to guide you through the different question types.

Team Registration Form

1. Girl's Team or Boy's Team*
   — Please Select —

2. Grade*
   Enter the grade you will be in during the season.

	6th Grade	7th Grade	8th Grade	9th Grade	10th Grade	11th Grade	12th Grade
Grade	○	○	○	○	○	○	○

3. Last Name, First Name*

4. How many years have you played this sport?*

	Five or More Years	Four Years	Three Years	Two Years	One year
Years Playing the Sport	○	○	○	○	○

5. Homeroom Teacher*

Done   Cancel

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Parental Consent

Page 1 of 1

1. Are you the custodial parent?*
- ○ Yes
- ○ No

2. Name of child.*

3. Name of event or activity.*

4. Date of Activity*

[ ] mm/dd/yyyy

5. I give permission for my son/daughter to attend the activity.*

– Please Select –

6. Please note any medical conditions that could affect your son/daughter's participation in the even/activity.*

Done Cancel

Exercise 5: Create an online quiz

1) Create a new form and title it.

2) Insert items as desired. If you are interested in having the quiz be graded automatically, be sure to choose question types where you can assign point values. Refer to Table 1.

3) Insert a link to the quiz on a page.

4) Take the quiz.

5) Review the results.