



USING FORMS TO CAPTURE INFORMATION

Excel Online Surveys, Office 365 Forms & Google forms

Quick comparison



Excel Online Surveys

- ✓ Great for short, specific surveys, such as dates for meetings, or “will you attend” type surveys
- ✓ Access via Excel Online
- ✓ Data is stored in Excel Online and can be shared with multiple people



Office 365 Forms

- ✓ Great for a flat form that require no separate sections
- ✓ Best if only one person needs to work with the responses



Google Forms

- ✓ Best for complex forms that may require sections, automated & real-time data manipulation
- ✓ Best for multiple owners

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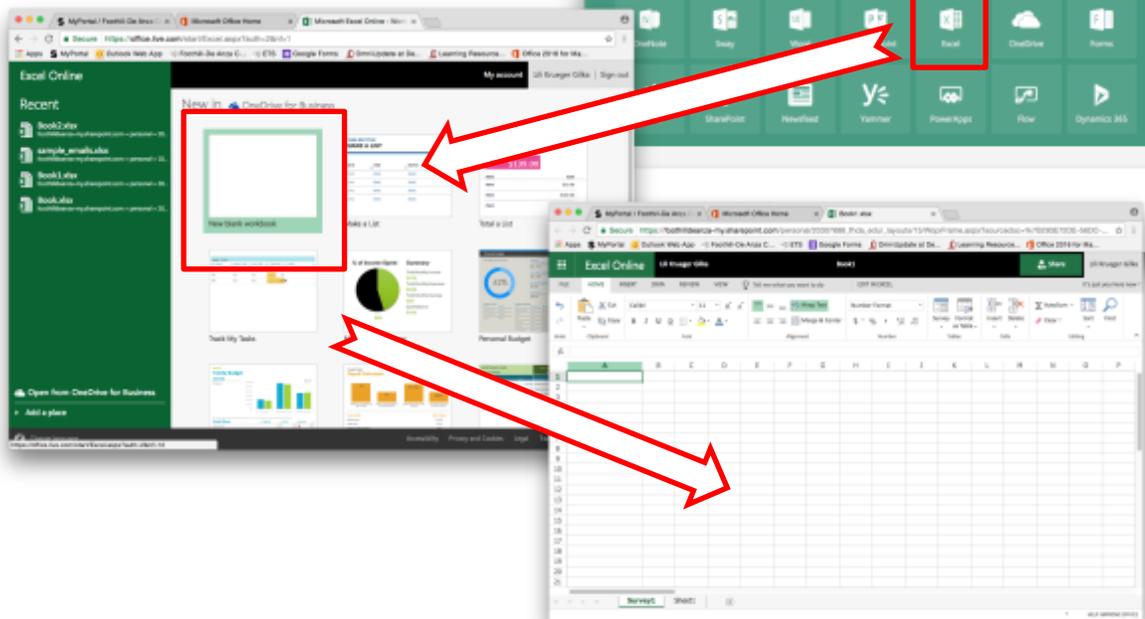
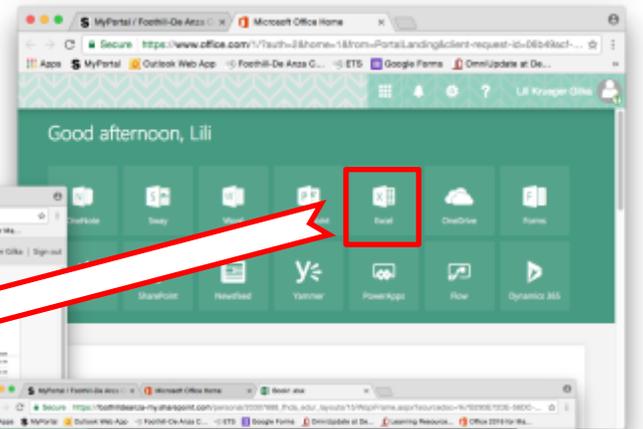
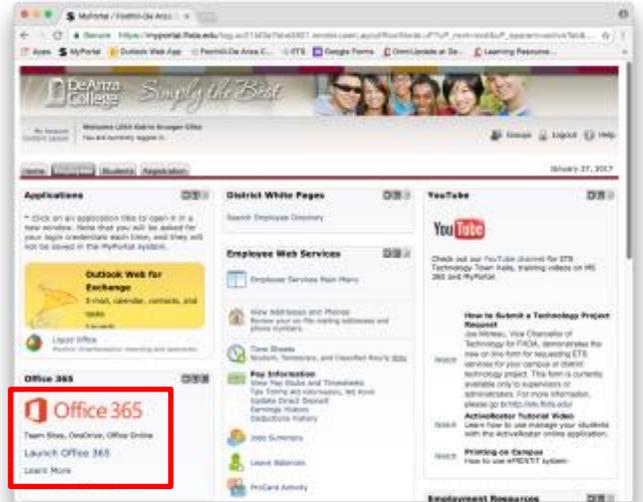
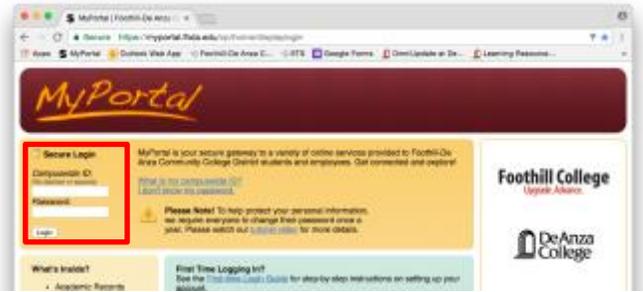
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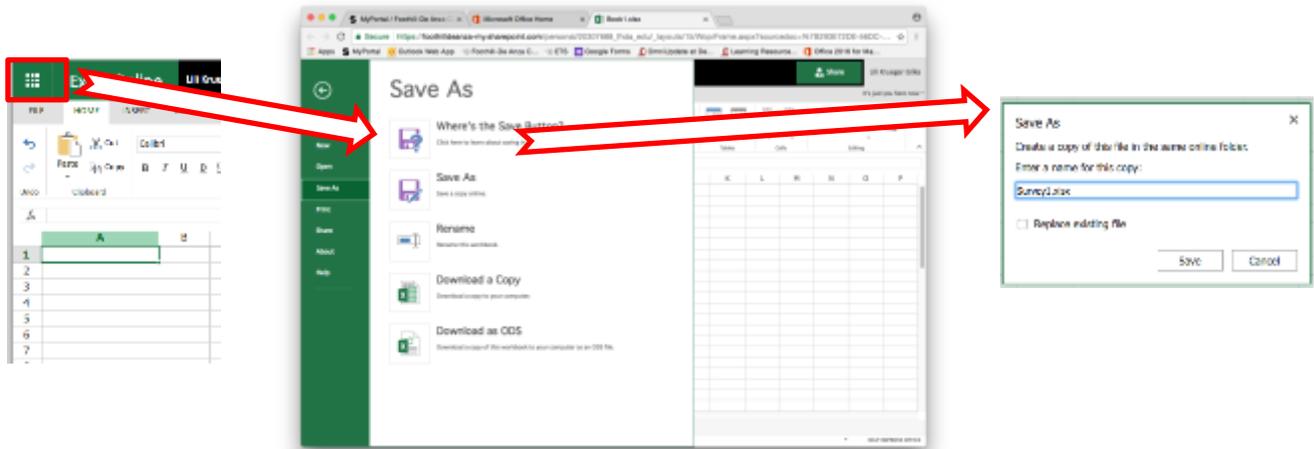
Excel Online Surveys

Creating a new survey

- a) Go to my portal and sign in with your Campuswide ID and Password
- b) In the Employee Tab click “Launch Office 365”
- c) Click on the “Excel” icon
- d) Open a “New blank workbook”



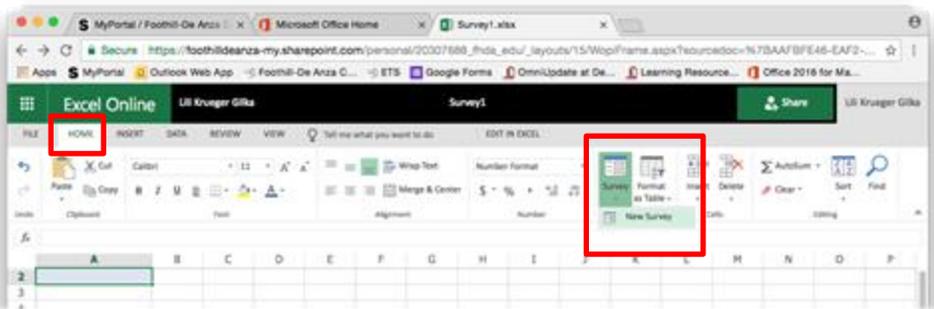
e) Click on the “File” tab to save your Excel Workbook



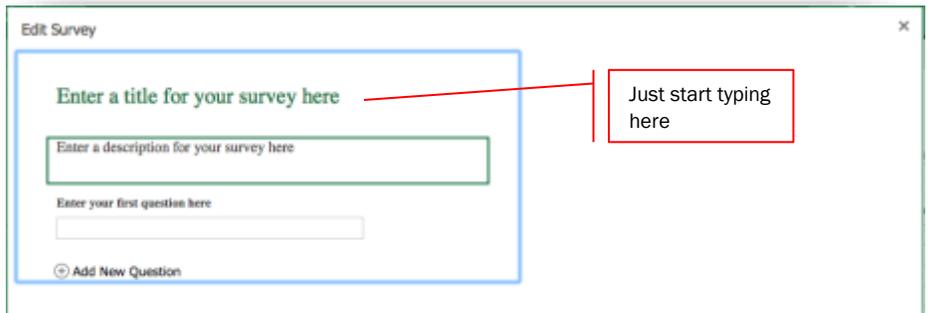
f) Click the Home Tab (or alternatively the Insert Tab)

g) Click “Survey” to open drop down menu

h) Select “New Survey”



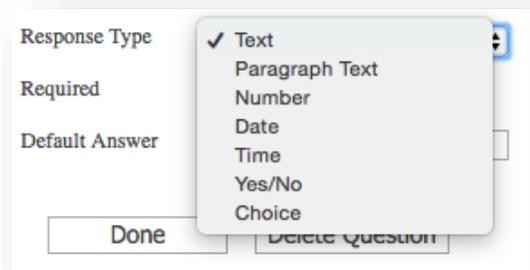
i) Create your survey by entering information in each placeholder



NOTE
The field “Enter a description for your survey here” will look like it’s not going to fit in the screen, but it will once completed.

j) There are a number of different question types (called Response Type):

- Text
- Paragraph Text
- Number
- Date
- Time
- Yes/ No
- Choice

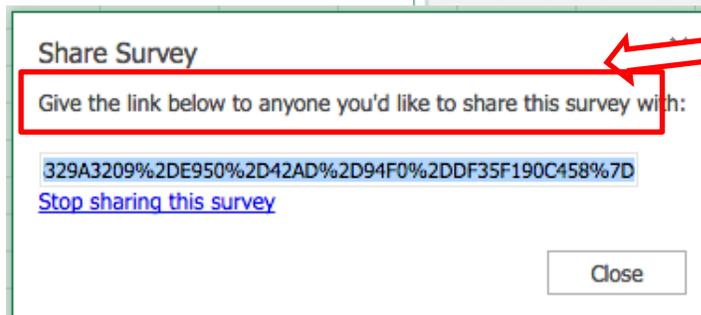
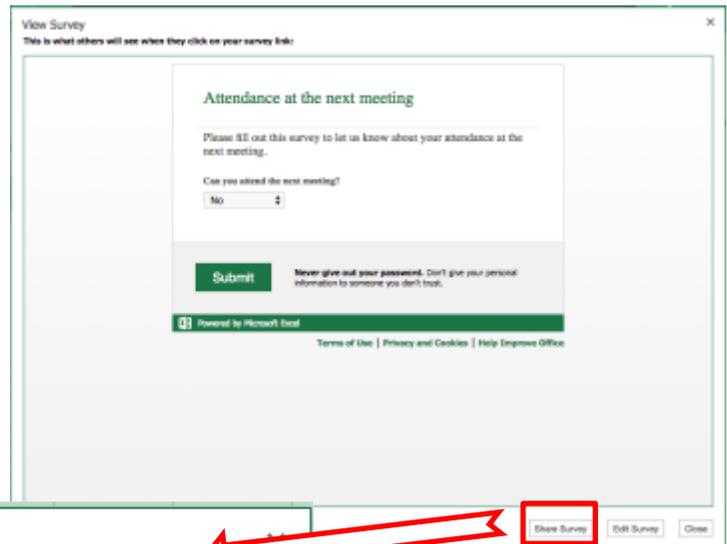




NOTE

If you do not want recipients to be able to continue/ submit a survey without answering a specific question, you can tick the 'Required' checkbox.

- k) When you have finished designing your questions click "Save and View" in the bottom right to preview what the survey will look like
- l) If you are happy with the survey as it is click "Share Survey", otherwise click "Edit Survey" to continue working on it
- m) Copy the link into your email or webpage

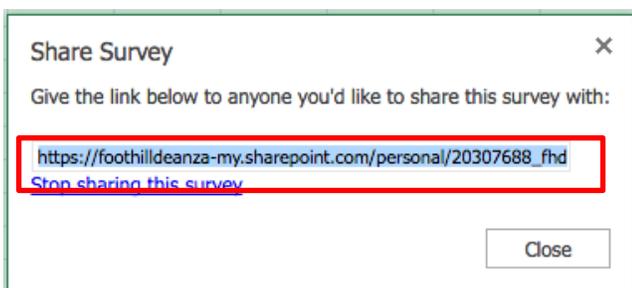


NOTE

Recipients do NOT need Office 365 in order to view or fill out the survey.

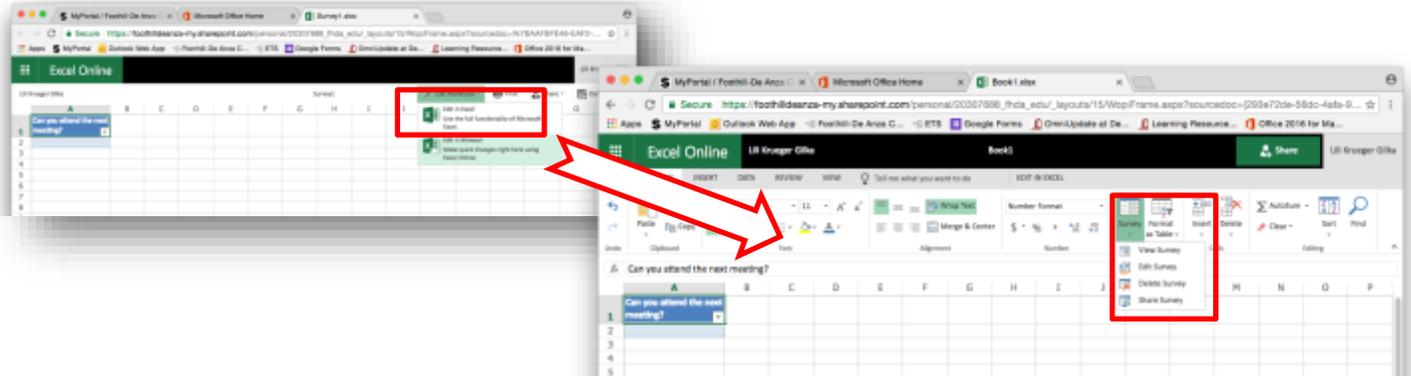
Sharing the survey at a later stage

- a) Log into Office 365 and Excel (see above for instructions)
- b) Click on the saved survey
- c) Click on "Edit in Browser" to be able to edit the survey
- d) Click "Share Survey"
- e) Copy the link into your email or webpage



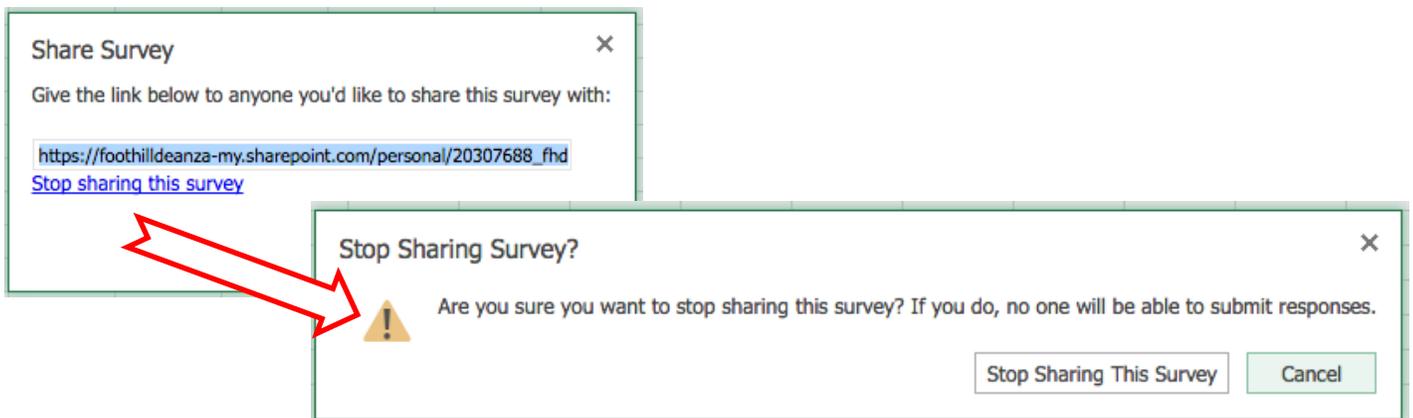
Editing the survey after having closed it

- Log back into Office 365 and Excel (see above for instructions)
- Click on the saved survey
- Click on “Edit in Browser” to be able to edit the survey
- Click “Edit Survey” to make any changes necessary



Closing the survey

- Log into Office 365 and Excel (see above for instructions)
- Click on the saved survey
- Click on “Edit in Browser” to be able to edit the survey
- Click “Share Survey”
- Click “Stop sharing this survey”



TIP

To share the workbook, which contains the survey results, click “Share” in the upper right corner of your screen and choose your sharing preferences.



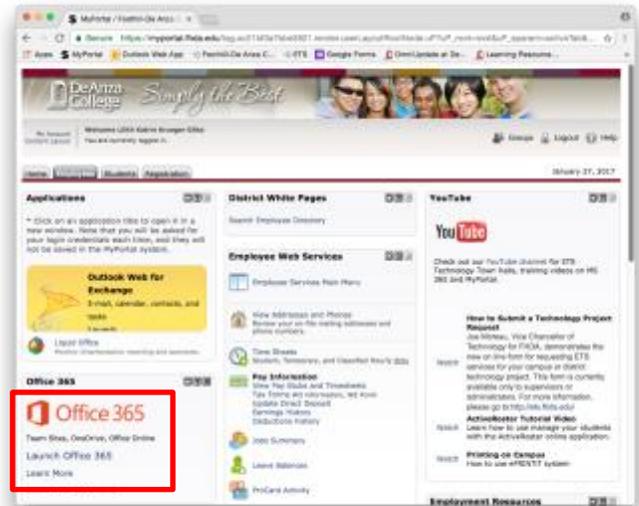
Office 365 Forms

Creating a new form

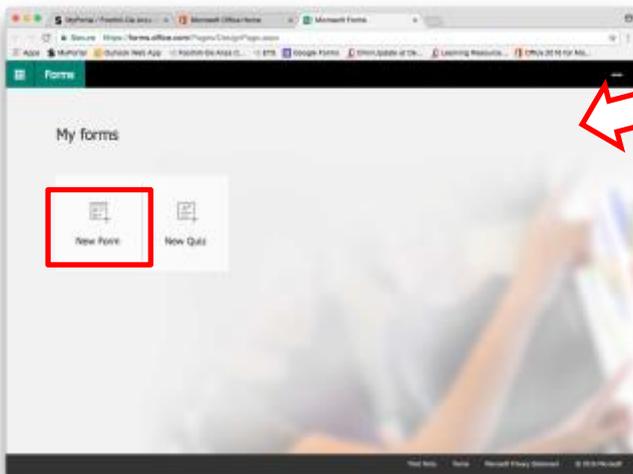
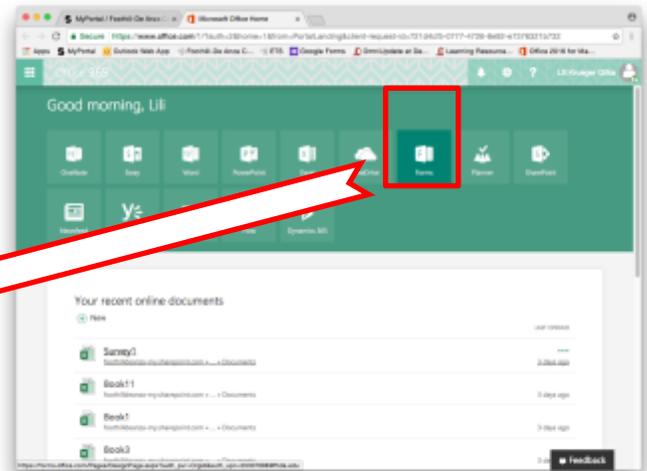
- b) Go to my portal and sign in with your Campuswide ID and Password



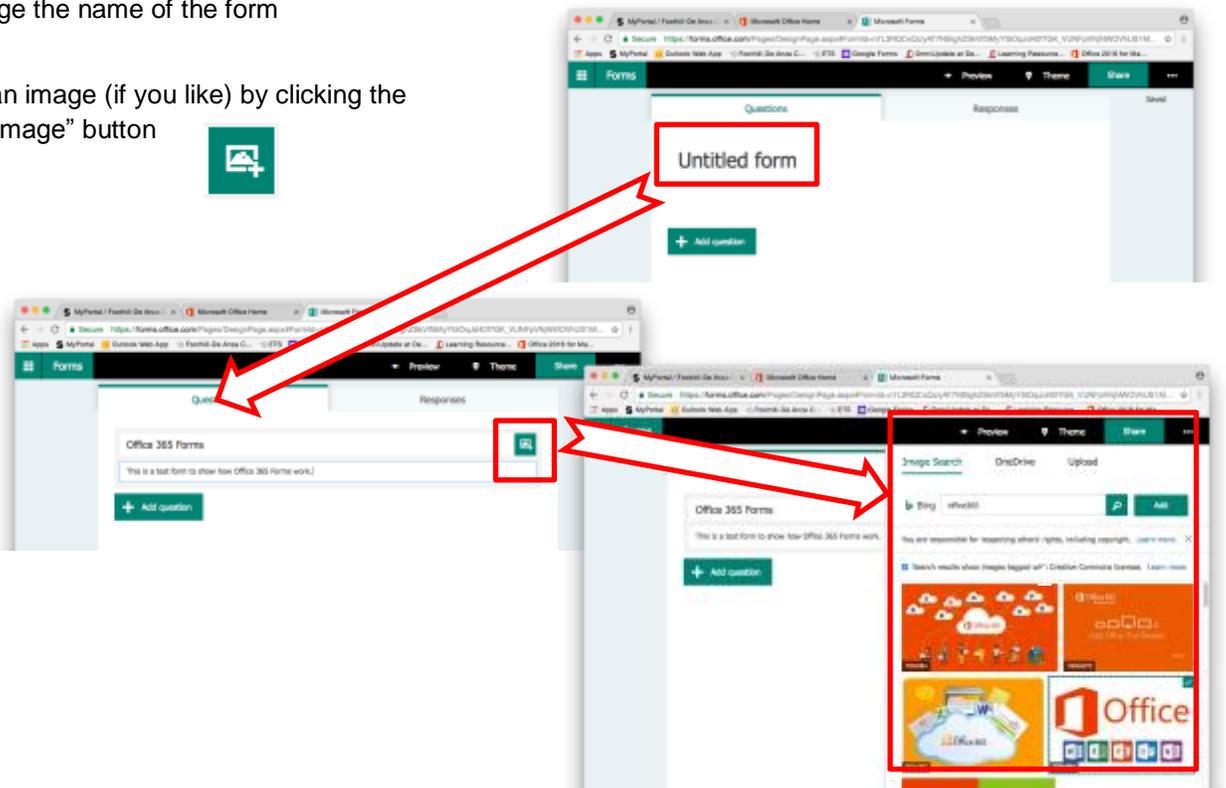
- c) In the Employee Tab click "Launch Office 365"



- d) Click on the Forms icon
- e) Click "New Form" to create a new form

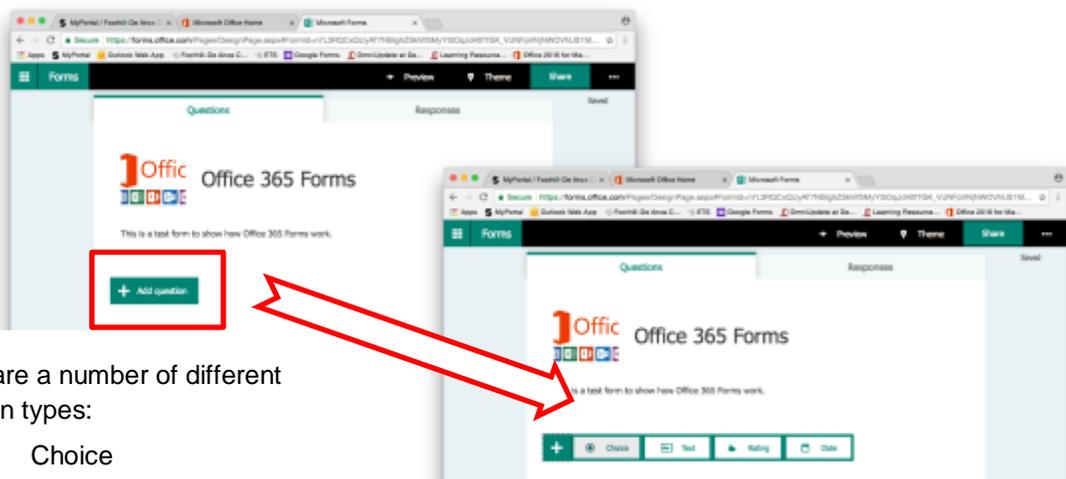


- f) Change the name of the form
- g) Add an image (if you like) by clicking the “add image” button



NOTE
Any time you see the “add image” button, you can use it to add images

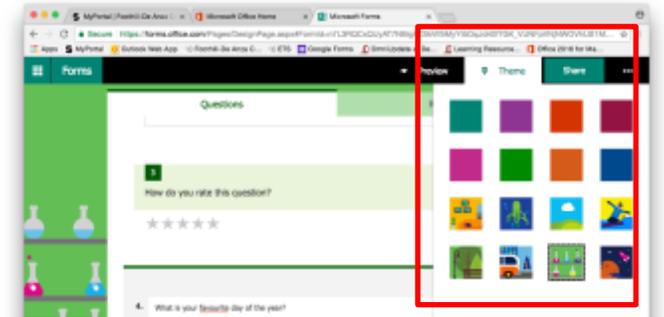
- h) Start adding questions by clicking on “+ Add question”



- i) There are a number of different question types:
 - Choice
 - Text
 - Rating
 - Date

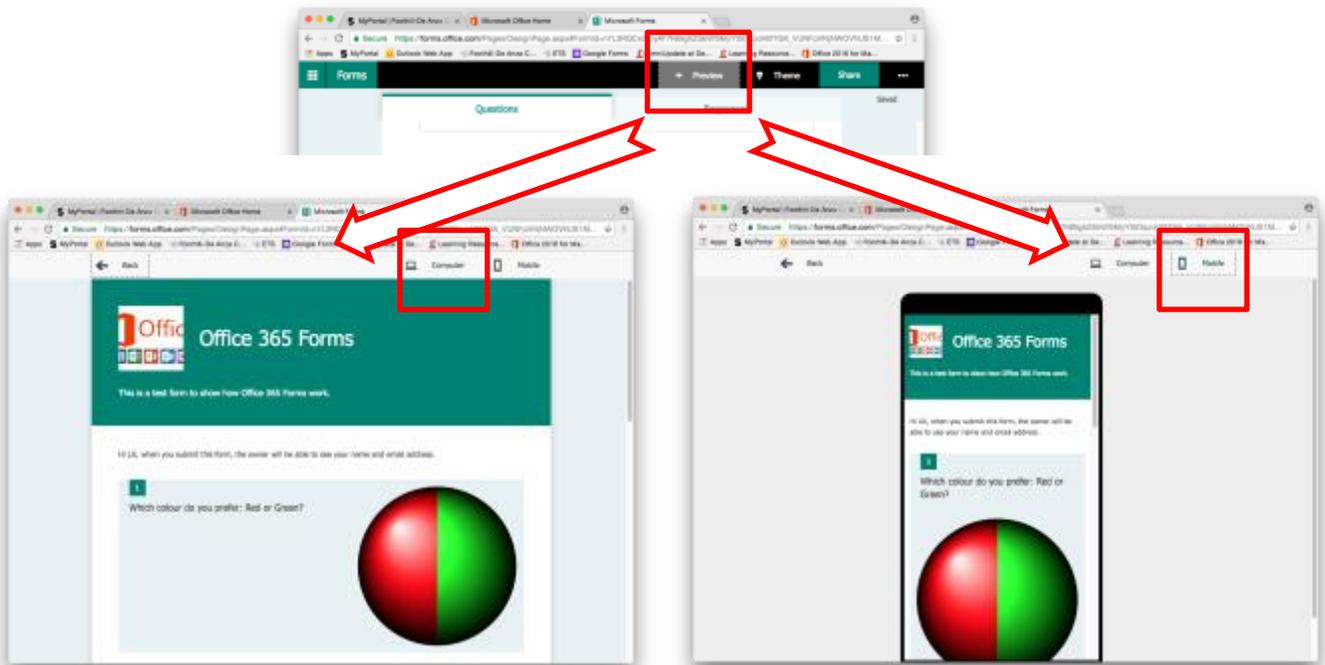
Choosing a design theme for your form

When you have finished your form layout you can change the design theme of the whole form by clicking on the “Theme” tab in the top right corner.



Previewing your form

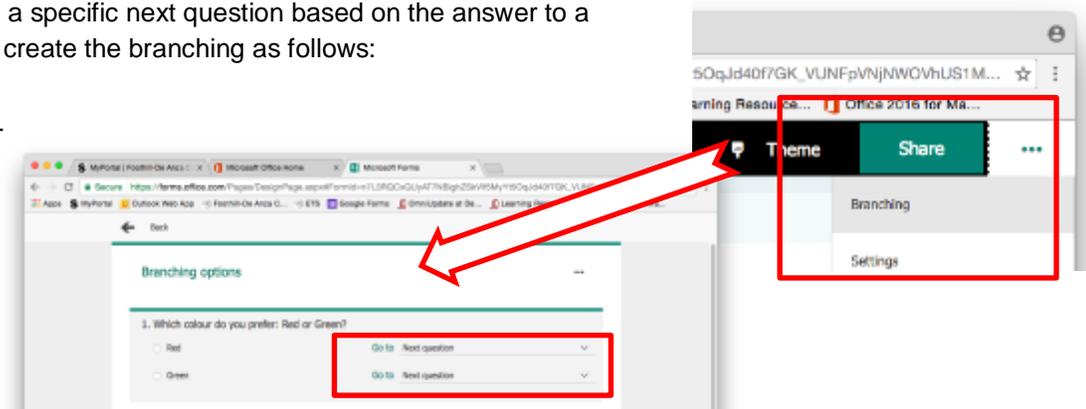
To preview your form, and see what your form looks like to recipients (Computer vs Mobile), click on the “Preview” Tab in the top right corner.



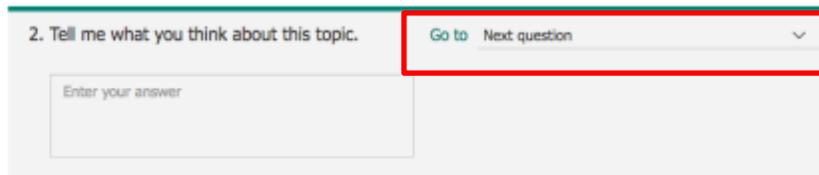
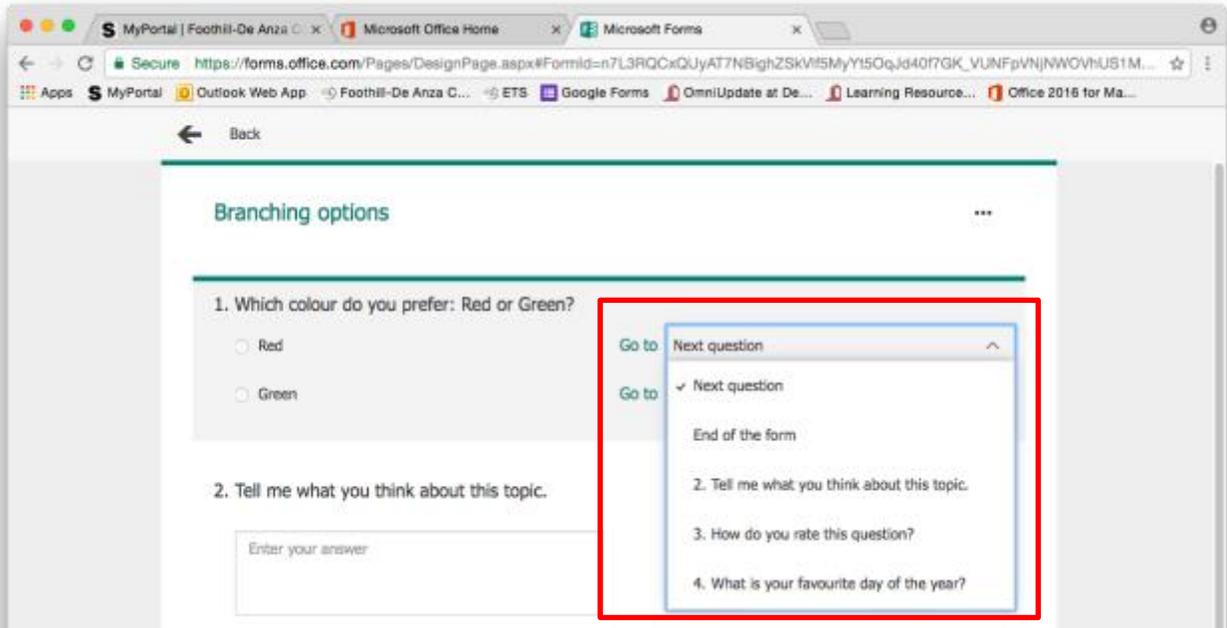
Creating branching for your form

If you want recipients to go to a specific next question based on the answer to a specific question you have to create the branching as follows:

- a) To set up branching for your form click on the “...” in the top right corner
- b) Select “Branching”

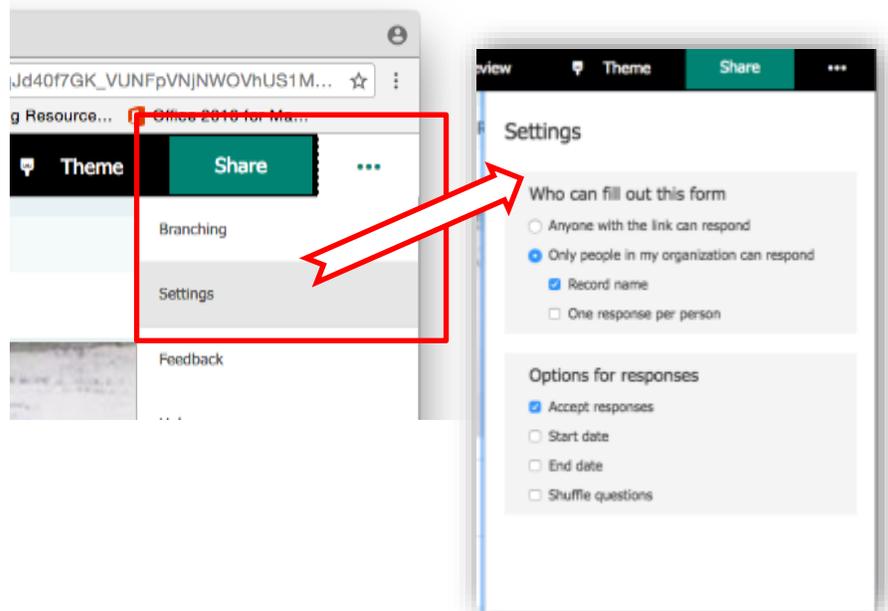


c) Select the how you would like your form to flow after each question with the “Go to” drop down menu



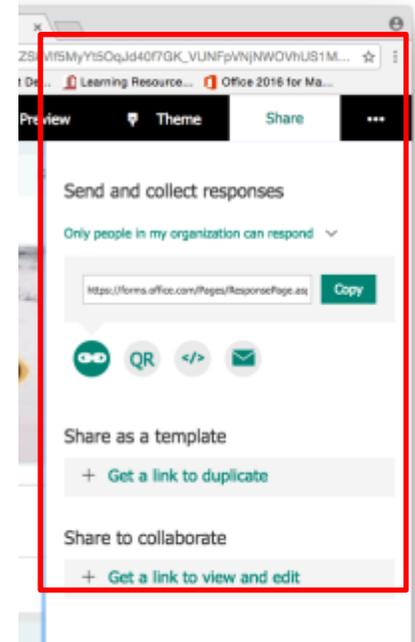
Change settings

- a) To change the settings for your form click on the “...” in the top right corner
- b) Select “Setting”
 - This is useful to set up
 - i. who will have access
 - ii. and for how long



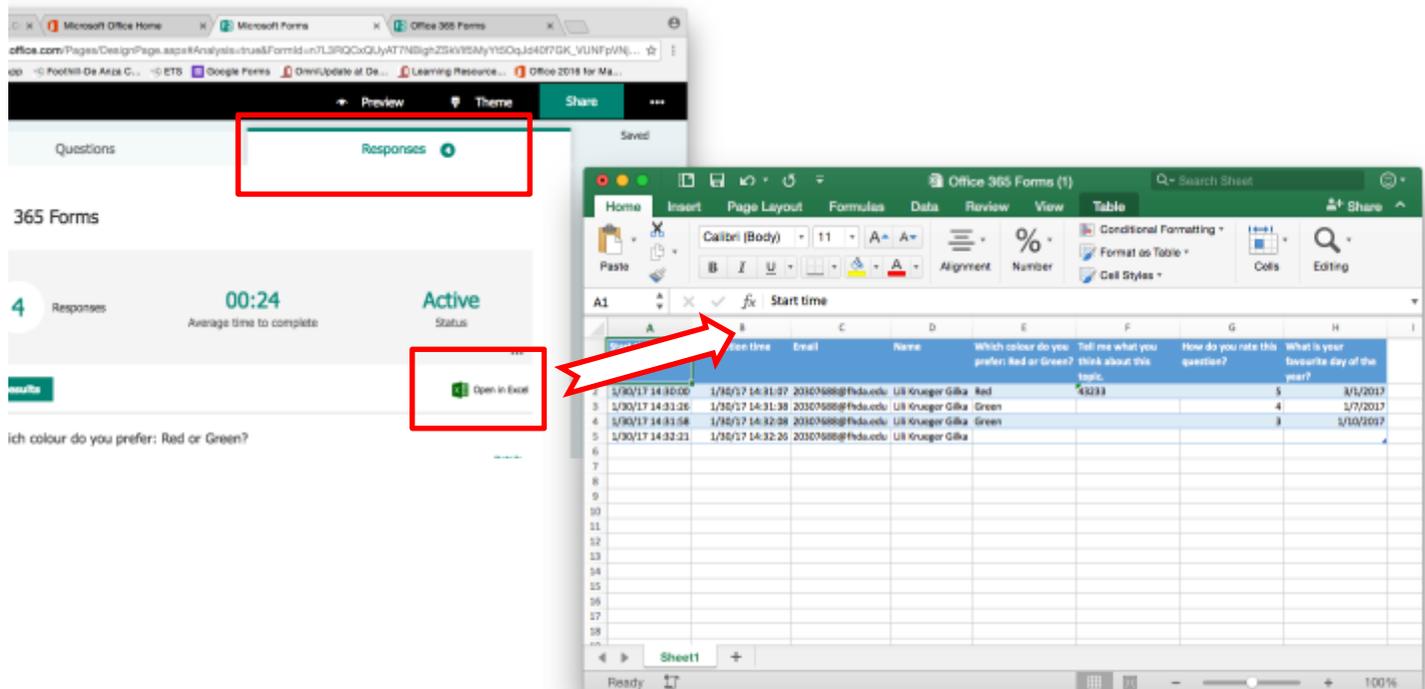
Sharing the form

- Click the “Share” button in the upper right corner
- Choose one of the following sharing options:
 -  will give you a link to copy into your email or webpage
 -  will give you a QR code that recipients can scan on a phone or tablet to access the form
 -  will give you an iframe to embed the survey in a webpage and the like
 -  will create an email in Outlook that already includes the link to the form



Viewing the responses

- Click the “Responses” tab to see a summary of responses per question
- Click the “Open in Excel” icon in the Responses area to download a spreadsheet of the responses



Start time	Email	Name	Which colour do you prefer: Red or Green?	Tell me what you think about this topic	How do you rate this question?	What is your favorite day of the year?
5/30/17 14:35:00	1/30/17 14:31:37	20307688@fda.edu	Lil Krueger Gilka	Red	4/5	3/1/2017
5/30/17 14:33:26	1/30/17 14:31:38	20307688@fda.edu	Lil Krueger Gilka	Green	4	1/7/2017
5/30/17 14:33:58	1/30/17 14:32:38	20307688@fda.edu	Lil Krueger Gilka	Green	3	1/10/2017
5/30/17 14:32:31	1/30/17 14:32:26	20307688@fda.edu	Lil Krueger Gilka			

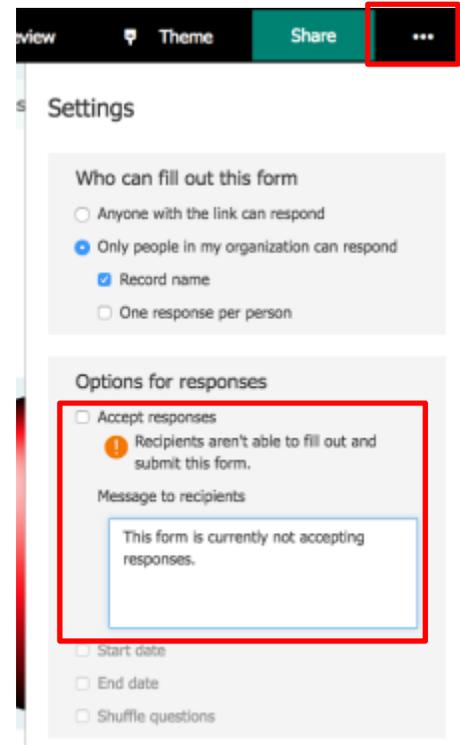


TIP

You can choose to create a “quiz” instead of a form to give feedback based on your responder’s answers – as long as the questions are multiple choice.

Closing the form

- Log into Office 365 and Forms (see above for instructions)
- Click on the saved form
- Click on the “...” icon in the top right of the screen to open more options
- Select “Settings”
- Un-tick the “Accept responses” checkbox to stop recipients from being able to fill out the form



Google Forms

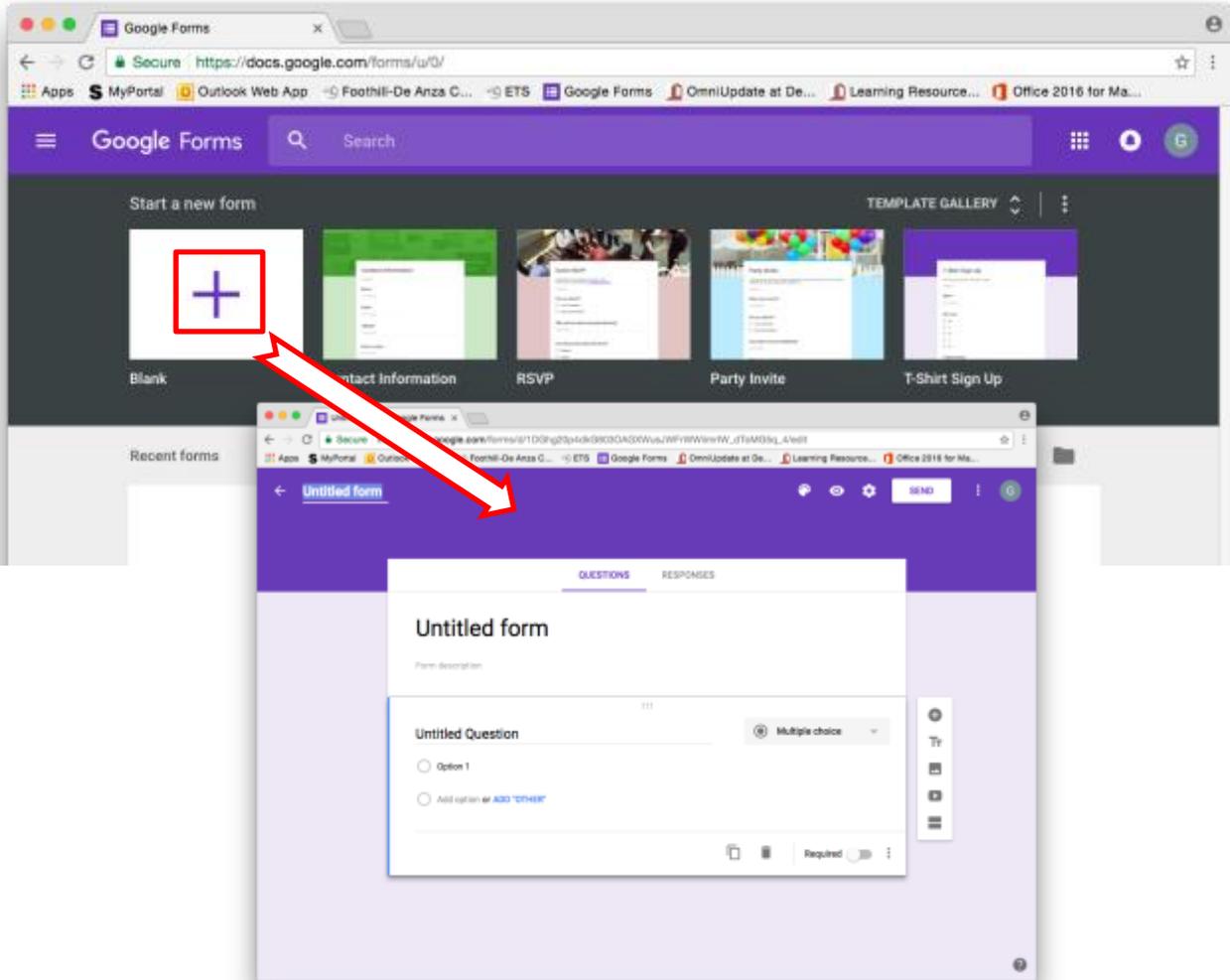


NOTE

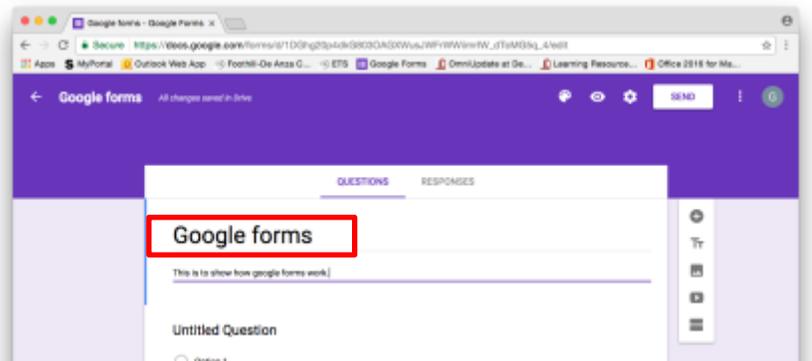
You will need to have a google account to access this. It is an easy 2-step process that will take a few minutes.

Creating a new form

- a) Go to forms.google.com in your preferred browser
- b) Click “+” to create a new blank form



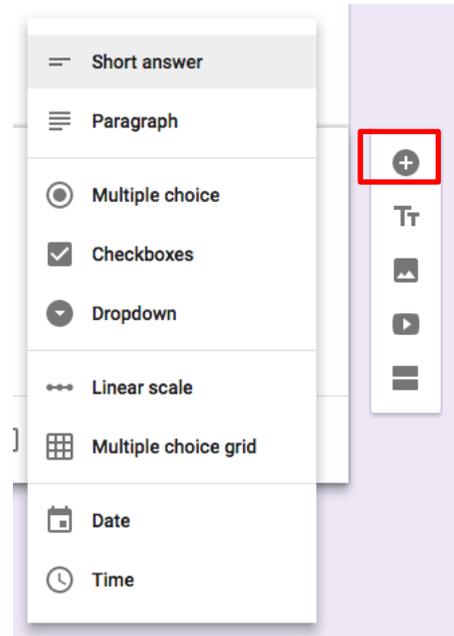
- c) Change the name of your form



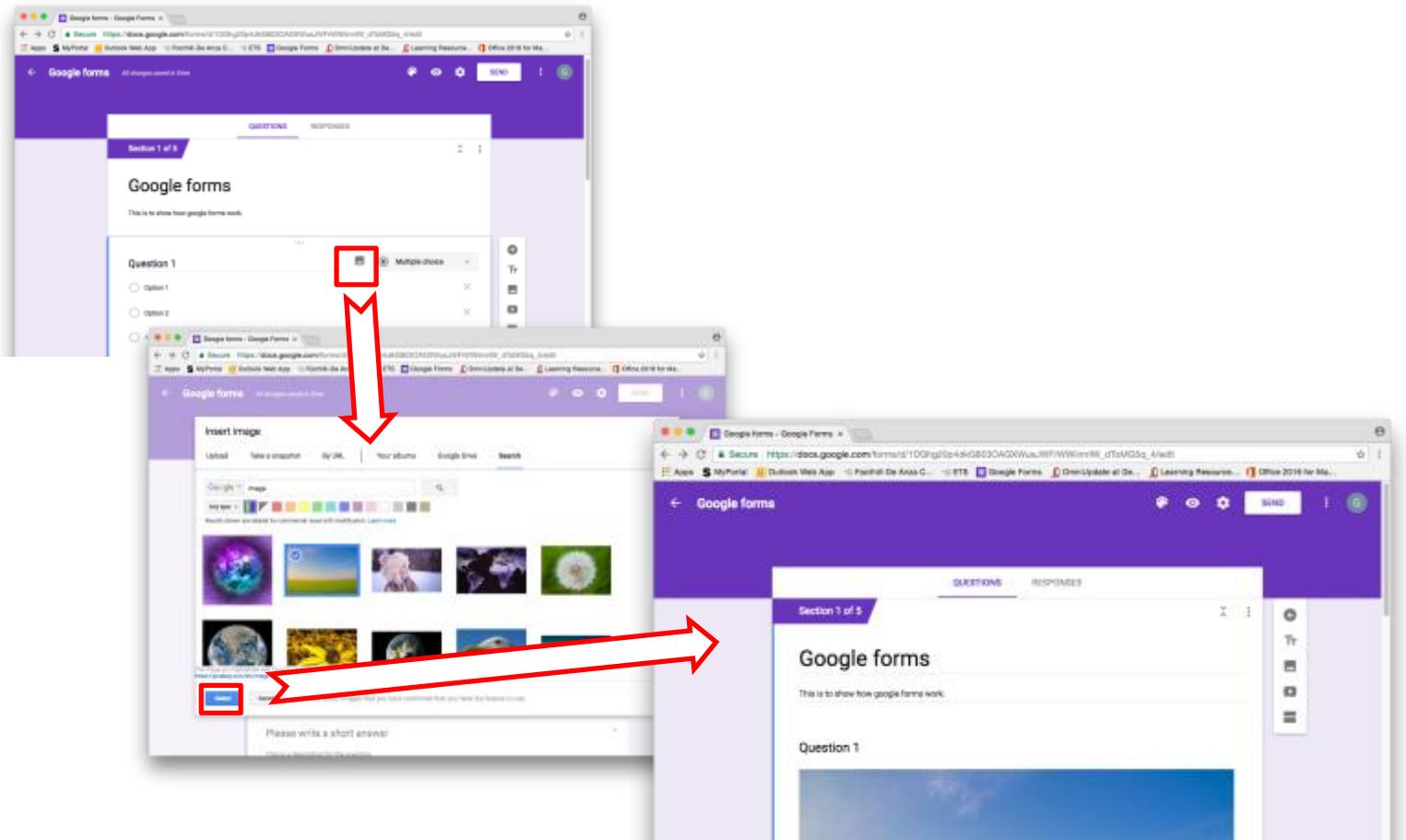
d) Start adding questions by clicking on the “+” button

e) There are a number of different question types:

- Short answer
- Paragraph
- Multiple choice
- Checkboxes
- Dropdown
- Linear scale
- Multiple choice grid
- Date
- Time



f) Add an image (if you like) by clicking the  “add image” button next to the Question title



NOTE

You can also use the floating menu on the right to add an image  or a video 



NOTE

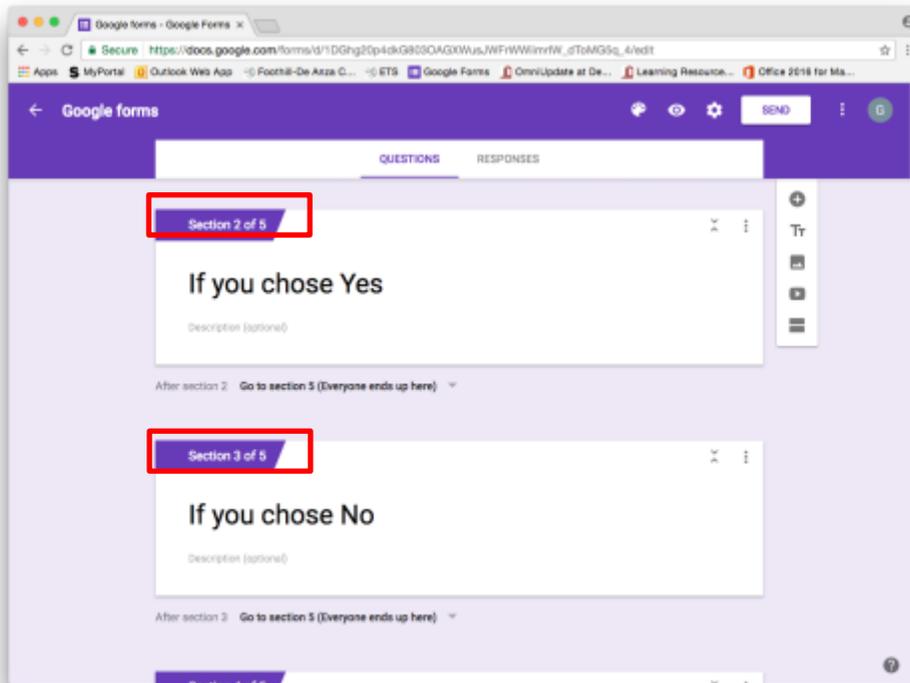
If you want to make it mandatory for recipients to answer a question switch on “Required” at the bottom right corner of the question.



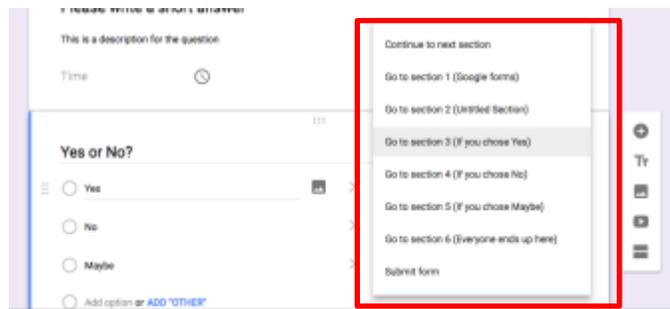
Creating sections for your form

If you want recipients to go to a specific section based on the answer to a specific question you have to create the sections as follows:

- a) To add sections to your form use the floating menu on the right

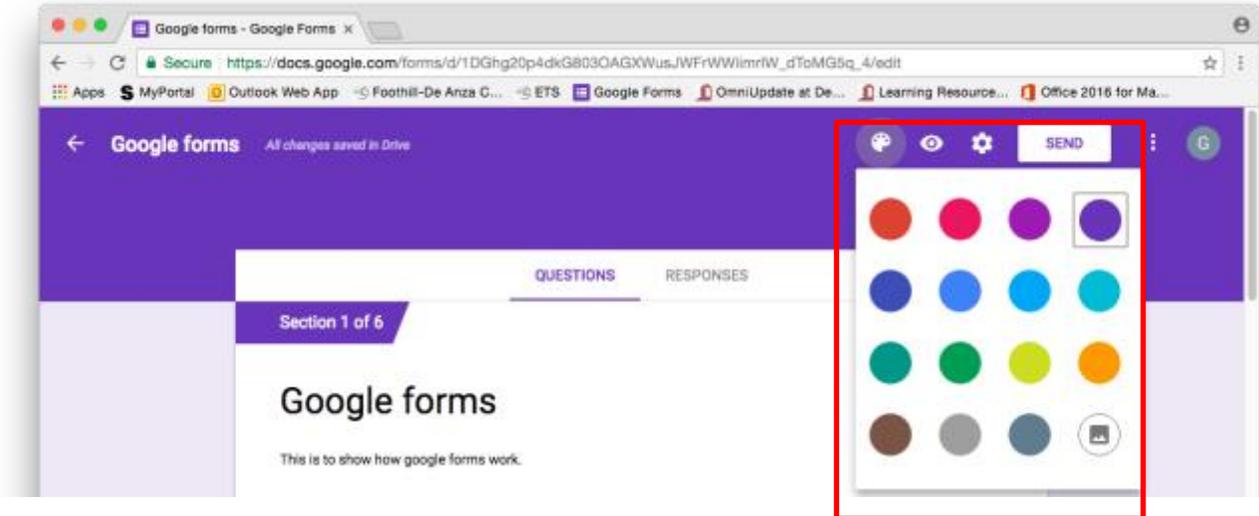


- d) Click the Options icon (three dots) at the bottom right corner of the question
- e) Select “Go to section based on answer,” and assign the section to each answer
- f) Select the how you would like your form to flow after each question with the “Go to” drop down menu



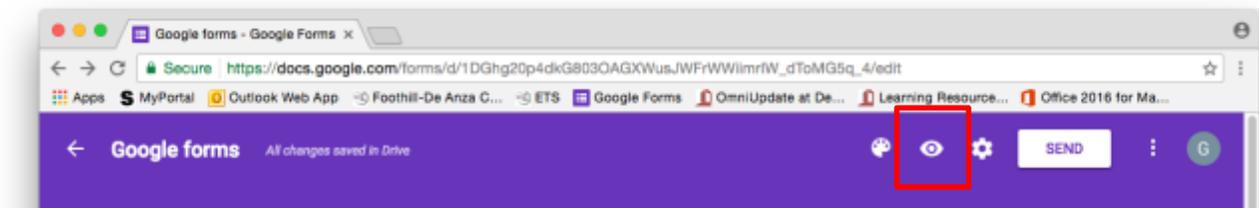
Choosing a design theme for your form

When you have finished your form layout you can change the design theme of the whole form by clicking on the “Theme” icon  in the top right corner.



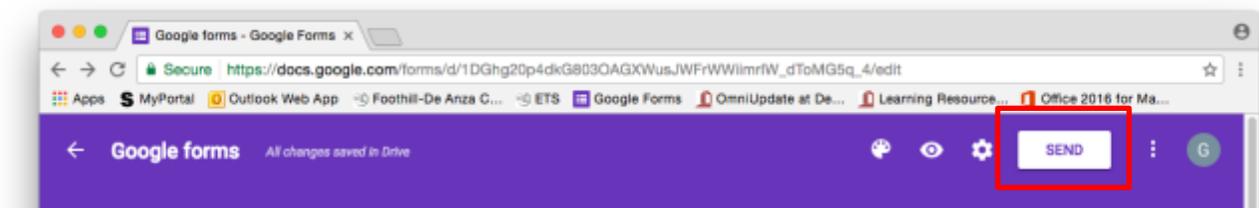
Preview your form

To preview your form, and see what your form looks like to recipients, click on the “Preview” icon  in the top right corner.



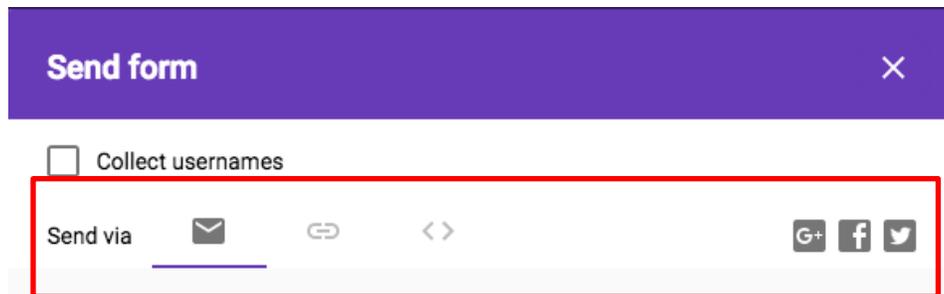
Sharing your form

- Click the “Send” button in the upper right corner



b) Choose one of the sharing options:

- Email
- Link
- Embedded
- via Google+
- via Facebook
- via Twitter

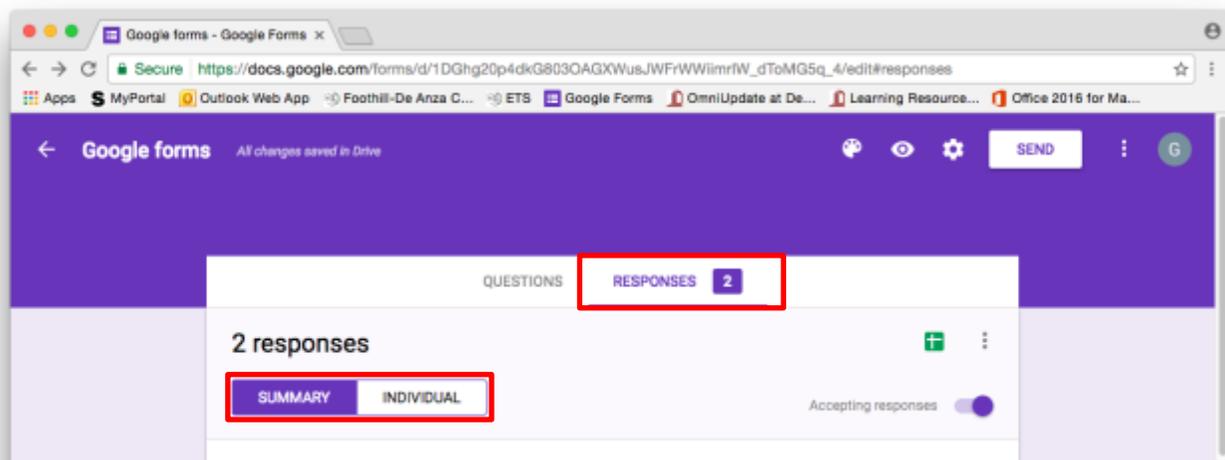


c) Depending on which option you choose you will have to

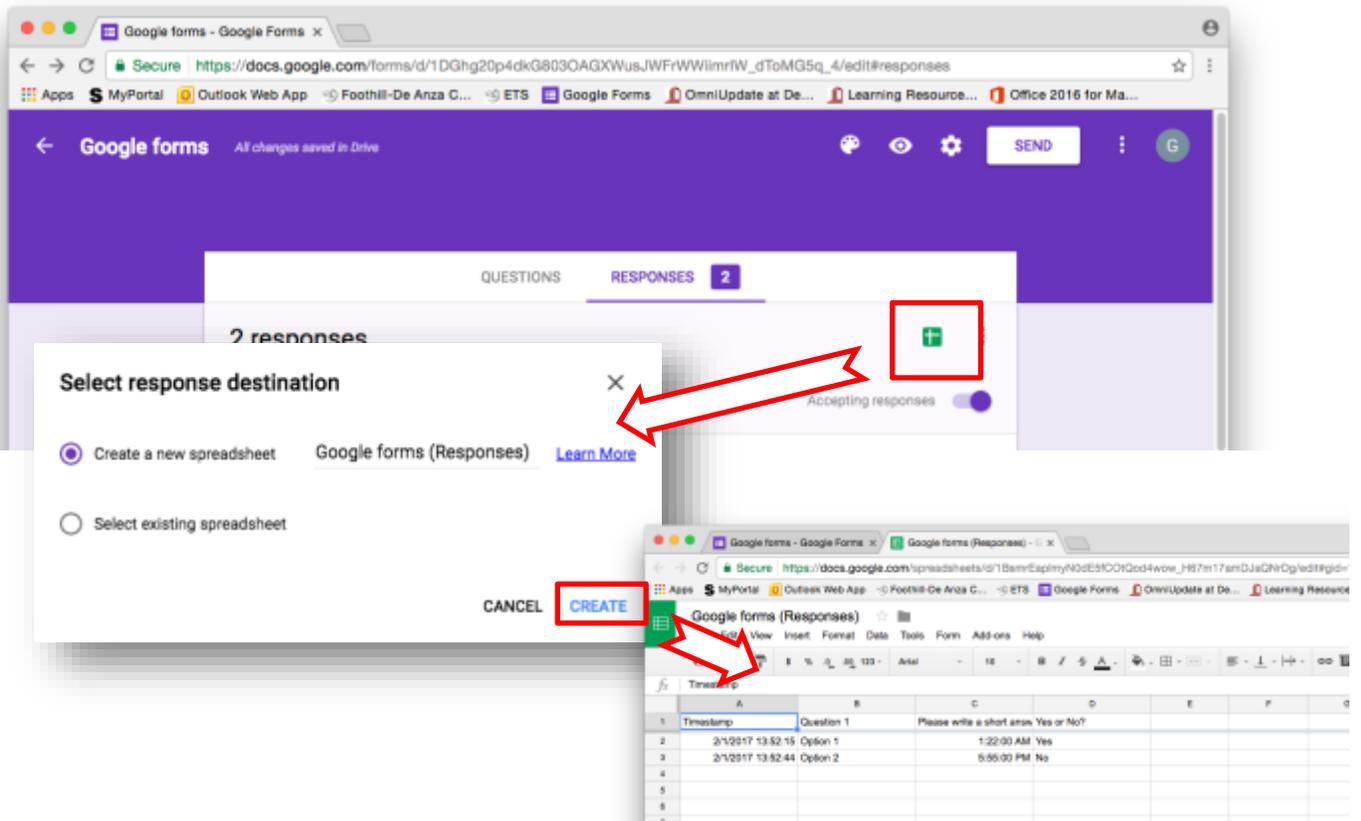
- click “Send” or
- click “Copy” or
- be redirected to your Google+, Facebook or Twitter accounts

Viewing the responses

a) Click the “Responses” tab to see the responses either as a summary or per individual response

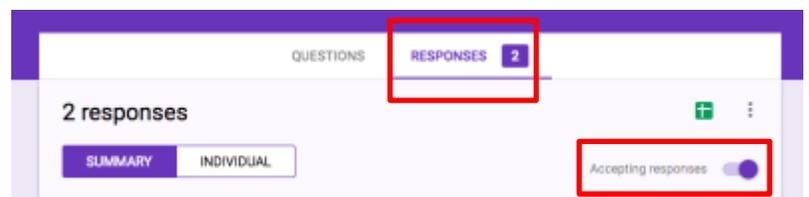


- b) Click the “Create Spreadsheet” icon in the “Responses” tab
- c) Select “Create a new spreadsheet”
- d) Click “CREATE”
- e) This will create a Google sheet that automatically updates every time someone completes the form



Closing the form

- a) Log into forms.google.com
- b) Click on the saved form
- c) Click on the “Responses” tab
- d) Switch “Accepting responses” to off



Useful query for attendance sheets

If you want to create individual attendance sheets based on a form you can use the following query to separate the responses based on a specific qualifier in the form. In this case, it is “Student”

=query('Form Responses 1'!B2:\$N, "Select B,C,D,E,F,G,H,I,J,K,L,M,N where B='Student'")

