## What is an XLSForm?

## Basic format

Each Excel workbook usually has two worksheets: **survey** and **choices**. A third optional worksheet called **settings** can add additional specifications to your form and is described below.

### **The survey worksheet**

This worksheet gives your form its overall structure and contains most of the content of the form. It contains the full list of questions and information about how they should appear in the form. Each row usually represents one question.

The **survey** worksheet has 3 mandatory columns: **type**, **name**, and **label**.

* + The **type** column specifies the type of entry you are adding.
  + The **name** column specifies the unique variable name for that entry. No two entries can have the same name. Names have to start with a letter or an underscore. Names can only contain letters, digits, hyphens, underscores, and periods. Names are case-sensitive.
  + The **label** column contains the actual text you see in the form. Alternatively, [label translation columns](http://xlsform.org/en/#language) can be used.

| **type** | **name** | **label** |
| --- | --- | --- |
| today | today |  |
| select\_one gender | gender | Respondent’s gender? |
| integer | age | Respondent’s age? |
| **survey**choicessettings | | |

### **The choices worksheet**

This worksheet is used to specify the answer choices for multiple choice questions. Each row represents an answer choice. Answer choices with the same **list name** are considered part of a related set of choices and will appear together for a question. This also allows a set of choices to be reused for multiple questions (for example, yes/no questions).

The **choices** worksheet has 3 mandatory columns as well: **list name**, **name**, and **label**.

* + The **list name** column lets you group together a set of related answer choices, i.e., answer choices that should appear together under a question.
  + The **name** column specifies the unique variable name for that answer choice.
  + The **label** column shows the answer choice exactly as you want it to appear on the form. Alternatively, [label translation columns](http://xlsform.org/en/#language) can be used.

| **list\_name** | **name** | **label** |
| --- | --- | --- |
| gender | transgender | Transgender |
| gender | female | Female |
| gender | male | Male |
| gender | other | Other |
| survey**choices**settings | | |

One thing to keep in mind when authoring forms in Excel is that the syntax you use must be precise. For example, if you write **Choices** or **choice** instead of **choices**, the form won’t work.

Settings worksheet

The **settings** worksheet is optional, but it allows you to further customize your form, including encrypting your records or setting an overall style theme to your form, among others.

An example **settings** worksheet is below:

| **form\_title** | **form\_id** | **public\_key** | **submission\_url** | **default\_language** | **version** |
| --- | --- | --- | --- | --- | --- |
| Example | ex\_id | IIBIjANBg… | https://example.com/submission | English | 2017021501 |
| surveychoices**settings** | | |  |  |  |

The column headings in this example **settings** worksheet do the following:

* **form\_title**: The title of the form that is shown to users. The form title is pulled from **form\_id**if **form\_title** is blank or missing.
* **form\_id**: The name used to uniquely identify the form on the server. The form id is pulled from the XLS file name if **form\_id** is blank or missing.
* **public\_key**: For encryption-enabled forms, this is where the public key is copied and pasted.
* **submission\_url**: This url can be used to override the default server where finalized records are submitted to.
* **default\_language**: In localized forms, this sets which language should be used as the default.
* **version**: String of up to 10 numbers that describes this revision. Revised form definitions must have numerically greater versions than previous ones. A common convention is to use strings of the form ‘yyyymmddrr’. For example, 2017021501 is the 1st revision from Feb 15th, 2017.