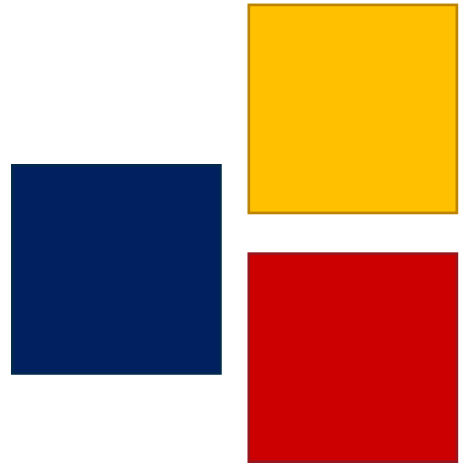
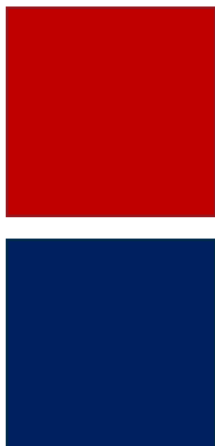


IT Training  
University College Cork



# Microsoft Forms



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## Introduction to Forms

With the Microsoft Office 365 Microsoft Forms app, you can create surveys, quizzes, and polls, invite others to respond to it using almost any web browser or mobile device, see real-time results as they're submitted, use built-in analytics to evaluate responses, and export results to Excel for additional analysis or grading.

### Overview of Training Material

This training guide will give you an overview of Forms and outline the steps to creating a form.

Every effort has been made to ensure complete and accurate information concerning the material presented in this training manual.

As the Office 365 apps are constantly being improved and updated you may notice some small variations when using the most up to date version of the app.

## GDPR and Forms

When collecting data via a form the most important thing is to have a clear "Data Protection Notice" The second most important thing is to have a clear opt in check box.

- State the intended use of the data you are collecting
- State how long the data will be stored
- Have a consent tick box. It should not be possible to submit the form without ticking the box. (There may be exception when gathering staff information for UCC work)

Detailed GDPR information can be found at: <https://www.ucc.ie/en/gdpr/>

## Key Steps to creating a Form

These are the key parts to creating a form using Microsoft Forms

1. Sign in to Office 365 using your UCC work credentials, and create a new form
2. Adjust settings for your form
3. Send your form to others and collect responses
4. View and analyse your form responses

1. Sign in to Office 365 to create a Form
  - Login to Office 365 using your work credentials

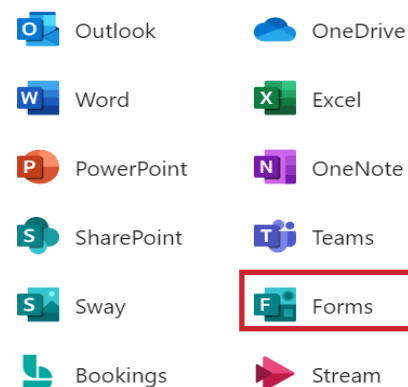


- Click on Sign In  
Click on the **Forms** app icon.  
(If you can't see the Forms app on your Office 365 launch page click on the Waffle icon and it will then be visible)



[Office 365](#) →

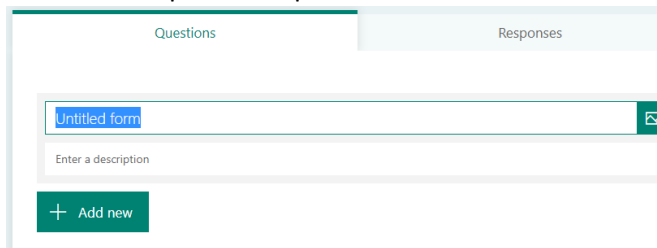
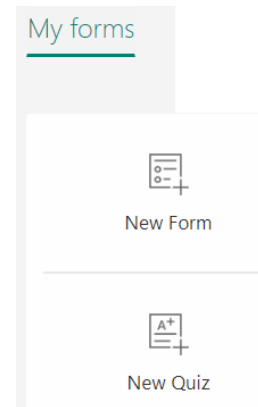
### Apps



[All apps](#) →

## 2. Create a New Form

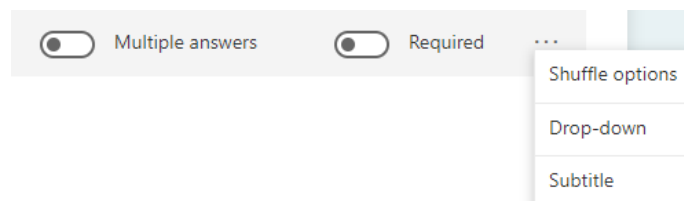
- Click on the **New Form** button
- Type a name for your Form by clicking into the Untitled form box  
**Note:** Form names can contain up to 90 characters and a subtitle can contain up to 1,000 characters.
- Enter a description if required in the box below the Form name

- Click the **Add new** to add a new question to the form. Choose from **Choice**, **Text**, **Rating**, or **Date** questions. You can also click on the down arrow to the right for more options, such as Ranking, Likert, File upload or Net Promoter Score® questions.  
**Note:** Your form is saved automatically while you create it.

- For choice questions, enter the text you want to display for the question and each of the choices.  
Click **Add Option** to add more choices than the default two choices. Click **Add “Other” option** button to add a choice option that displays the text Other. To remove a choice, click the trash can button next to it.

- You can also choose to make a question required or allow multiple choices for a question by changing the settings at the bottom of the question.

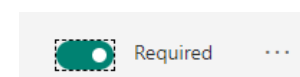


To have Microsoft Forms randomly shuffle the order of the options displayed to users of the form, click ... for settings for question

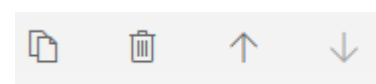
**Tip:** Click .... And select Subtitle to add a subtitle for a question

- Some choice questions will trigger auto suggestions
- Text questions also allow you to set restrictions when you need to have numbers as the answer. Click **More settings for question** ..., and then select **Restrictions**. You can choose to restrict the numbers by selecting from the various options such as **Greater than**, **Less than**, **Between**, and many others.

- If you need a question to be answered turn on the **Required** button



- There are also buttons to copy, delete and move questions up or down.

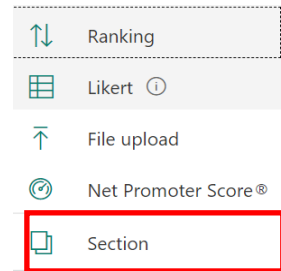


## Sections

If you're creating a lengthy form, it's helpful to organize your questions into multiple sections which you can easily rearrange and reorder. Sections help your form responders consume a long form that has been organized into smaller parts. It will also help if you are using branching on your form (see following page for more on branching).

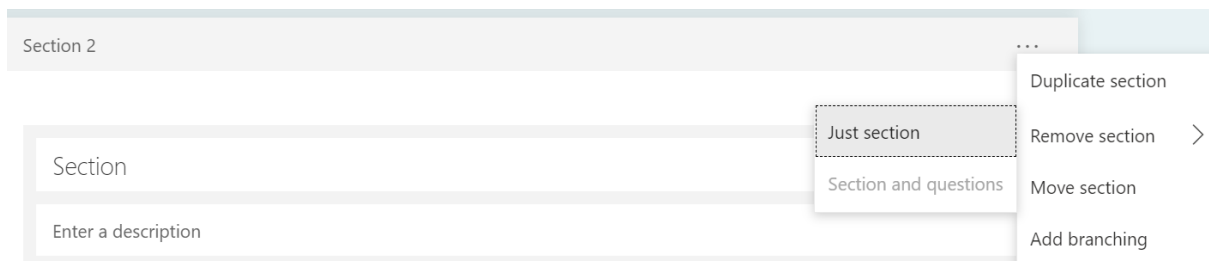
### To add a section

- Click the **Add new** to add a new question to the form.
- Click on the down arrow to the right for more options and select **Section**
- When you have sections in your form you can duplicate, move and remove sections by clicking on ... on the section heading. Branching can also be added to sections.



### Remove a section

- Click on ... and click on Remove section
- Select **Just section** to remove just the section header, or select **Section and questions** to remove the section and all questions within it.



**Note:** The shuffle question option is disabled when you include sections in your form.

## Branching

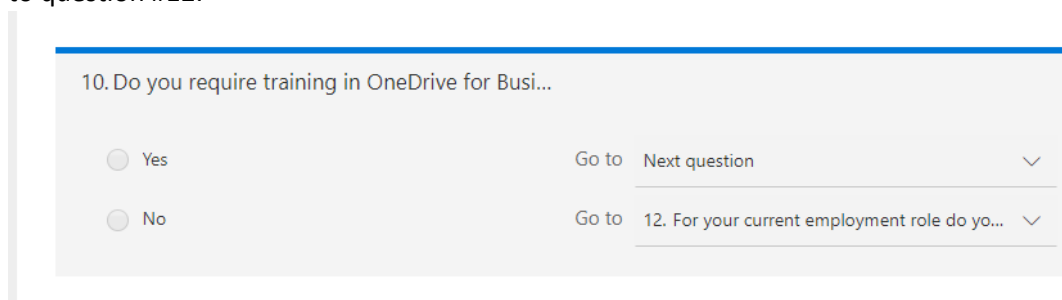
You can add branching logic to a survey or quiz so that it changes according to the responses to specific questions. In a survey or quiz that branches, questions appear only if they are relevant to the responder. If the questions don't apply, the responder is redirected to a different set of questions or will skip a set of questions altogether.

**NOTE:** Before you start branching, *it's a good idea to make sure all your questions are created*. When you're ready to add branching, follow these steps:

- Click the ellipses button ... for More settings for the question

### Branching option in forms

- On the Branching options page, there are dropdown menus that appear with each answer under every question. Click the arrow to see a dropdown menu.
- The dropdown menu contains a list of every question that follows.
- For each possible response to the question, select the question that you want to branch to. In this example, if a responder answers Yes to Question 10, you want him or her to go on to the next question (#11). However, if the responder answers No, you would branch, or skip, to question #12.



The screenshot shows a question titled "10. Do you require training in OneDrive for Busi...". Below the title are two radio button options: "Yes" and "No". To the right of each option is a "Go to" dropdown menu. For the "Yes" option, the dropdown shows "Next question". For the "No" option, the dropdown shows "12. For your current employment role do yo...".

- Insert additional branches to your form, repeating the steps above. If you want a question assigned as the final one in the survey or quiz, click the dropdown menu next to that question, and then select End of the form. If you have added sections to your form you can also navigate to different sections of the form.
- If you want to completely reset your form and remove branching, click the ellipses button (...), and then select Reset.



The screenshot shows the "Branching options" page. On the left, the text "Branching options" is displayed. On the right, there is a button with an ellipsis icon (...) and the word "Reset" below it.

## Form Settings

- To get to the Settings screen, click the ellipses button ... on the top right of your screen, and then select **Settings**.
- The following options appear

### Settings

Who can fill out this form

☐ Anyone with the link can respond

☒ Only people in my organization can respond

☒ Record name

☐ One response per person

Options for responses

☒ Accept responses

☐ Start date

☐ End date

☐ Shuffle questions

☐ Customize thank you message

Notification

☐ Send email receipt to respondents

☐ Get email notification of each response

Share ...

Settings

Multilingual

Print Form

Feedback

Terms

- Select as required from the options displayed

## Form Themes

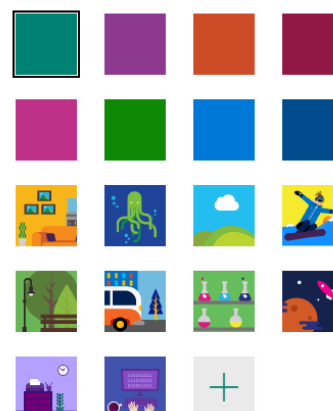
To change background design, colour and to add images use Themes.

- Click on the Themes button to the right of the form

Preview Theme Share ...

Saved

- Here you have several colours and backgrounds to choose from. The last button with the + symbol gives you further options to add an image or customise the theme colour.



**Tip:** As this image is a background image for the entire form it can be difficult to position it. For UCC crest or dept logo it may look better to add an image above the form title

Check out UCCs Visual Identity Guidelines website for guidelines on UCC Branding colours and use of the UCC of crest <https://www.ucc.ie/en/dewg/resources/vigs/>



### 3. Sending Form and Collecting Responses

You can copy a link to the form that you created and paste it into a shared area, send a QR-code for your form, embed the form directly into web page, or send the form link in an email. By clicking the link or scanning the QR code, people can respond to the form or quiz and submit their answers using their desktop or mobile web browser. You can also choose options to allow anyone to submit responses or restrict responses to only people within your organization.

**Note:** When you share a form anyone with the link can respond to the form

- In Microsoft Forms, open the form you want to send.
- Click **Share**. Do one of the following:



Make sure the **Link** button is selected and then click Copy next to the text box that displays a form URL. Copy and then paste this link wherever your intended audience can see and click it to gain access to your form



Click the **QR button** to view a QR code for your form. Click **Download** and then paste this link wherever your intended audience can scan it with a QR code scanner



Click the **Embed** button.  
Click Copy next to the text box that displays the embed code and then type or paste this embed code into a blog or web page to embed your form  
See <https://www.ucc.ie/en/dewg/resources/forms/> for more information on embedding forms.

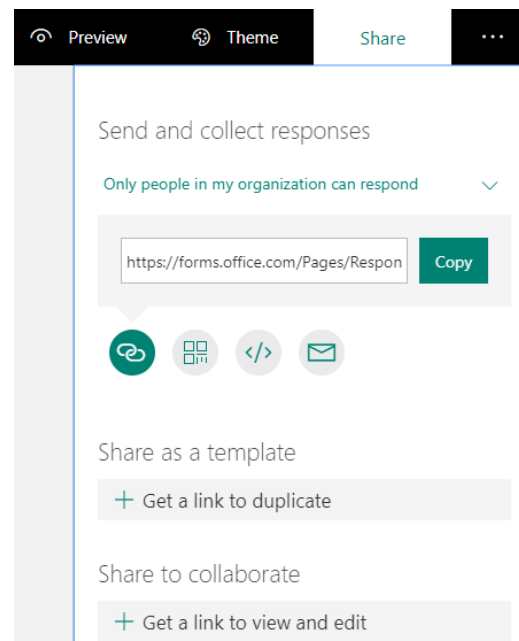


Click the **Email** button.

Your default email editing application opens (Outlook).

**Note:** you might see a security prompt letting you know an application is trying to open your email editor.

In the **To** box of your email editor, type the email addresses of the people you want to view your form. Microsoft Forms includes a brief note for the recipient in the email body, so they have proper context for your invitation and a link to your form. Click **Send**.

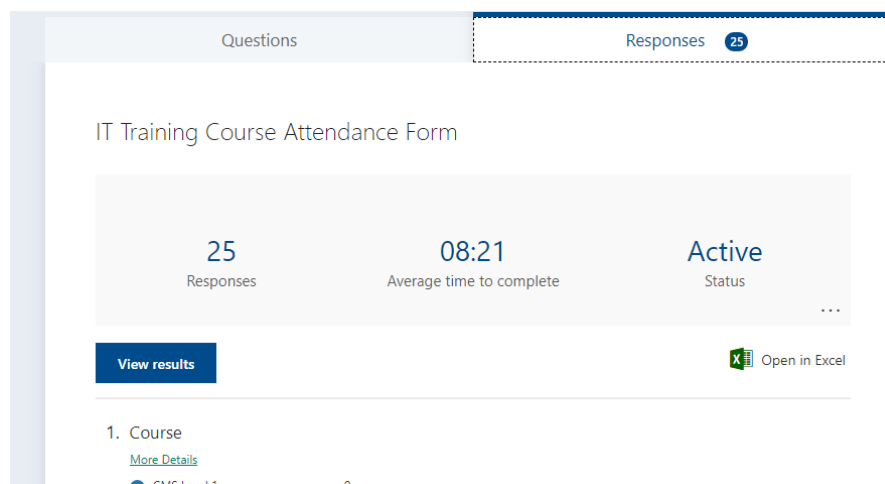


## 4. View and Analyse Responses

Microsoft Forms includes rich, real-time analytics that provide summary information and individual results for forms. You can export the results to Microsoft Excel for more in-depth analysis, as well as delete or print a summary of responses.

View summary information for your form

- Open the form and click the **Responses** tab.
- Across the top, you'll see summary information data about your form, such as number of **responses**, average time it took for responders to complete your form, and the form's status.

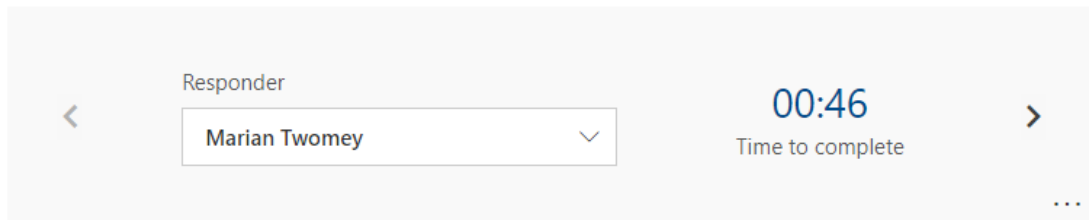


- After clicking on **Responses** you will get a summary of responses. For each question you will see the number of responses and for some of the question types there will be a chart.
- Click on the **More Details** link to view all responses for a specific question.

Check response data for each question

- After clicking on the **View results** button click the arrow next to the Responder name to jump to the results of another responder. You can also click the left and right arrows to toggle through the result details of the other responders.

### View results



The screenshot shows a light gray rectangular interface. On the left, there is a left-pointing chevron (<). In the center, there is a dropdown menu labeled 'Responder' with 'Marian Twomey' selected and a downward arrow icon. To the right of the dropdown, the text '00:46' is displayed in a large blue font, with 'Time to complete' written in a smaller gray font below it. On the far right, there is a right-pointing chevron (>) and three small gray dots (...

- Click the ellipses button (...) to delete all responses for an individual or print all responses for a particular individual.
- Click the **Back** button to go back to the summary of responses.

## View results in Excel

You can easily view all the response data for your form in Microsoft Excel. The Excel workbook is automatically stored in OneDrive for Business and contains a live data connection to your form. Any new response data in your form will be reflected in your workbook.

- Click on the Responses tab in the required Form and click on **Open in Excel** to capture a snapshot of your current response data.

	A	B	C	D	E	F	G	H	I
	ID	Start time	Completion time	Are you currently using Office365	Please select the apps within Office365 that you are currently using	Are you currently using One Drive for work related files	If you are using One Drive for work related files, please select which you are using	Do you require training in OneDrive for Business?	If you answered Yes in Q10 which of the following training options would you prefer?
1	1	12/13/18 11:11:25	12/13/18 11:12:47	Yes;	Outlook;OneDrive;Word;Excel;Teams;Yammer;	Yes	OneDrive for Business	Yes	Classroom Based training
2	2	12/19/18 15:59:36	12/19/18 16:01:05	Yes;	Outlook;OneDrive;Word;	Yes	Don't know	Yes	Classroom Based training
3	3	12/19/18 16:04:31	12/19/18 16:06:54	Yes;	Outlook;OneDrive;Word;Excel;	Yes	Don't know	Yes	Classroom Based training
4	4	12/19/18 16:06:37	12/19/18 16:13:02	Yes;	Outlook;OneDrive;Word;Excel;	Yes	OneDrive for Business	Yes	Classroom Based training
5	5	12/19/18 16:08:55	12/19/18 16:13:34	Yes;	Outlook;Word;Excel;	No	Don't know	Yes	Classroom Based training
6	6	12/19/18 16:12:59	12/19/18 16:14:32	Yes;	Outlook;Word;Excel;	No		Yes	Classroom Based training
7	7	12/19/18 16:19:05	12/19/18 16:21:24	Yes;	Outlook;Word;Excel;	Yes	OneDrive for Business	Yes	Classroom Based training
8	8	12/19/18 16:31:48	12/19/18 16:33:04	Yes;	Outlook;OneDrive;Word;Excel;	Yes	OneDrive for Business	No	Classroom Based training
9	9	12/19/18 16:25:43	12/19/18 16:43:11	No;		No		Yes	Classroom Based training
10	10	12/19/18 16:40:08	12/19/18 17:02:22	Yes;	Outlook;OneDrive;Word;Excel;	Yes	OneDrive for Business	No	
11	11	12/19/18 17:26:22	12/19/18 17:28:15	Yes;	Outlook;OneDrive;Word;Excel;	Yes	OneDrive for Business	No	
12	12	12/20/18 10:29:32	12/20/18 10:30:48	Yes;	Outlook;Word;Excel;	No	Don't know	Yes	Classroom Based training
13	13	12/20/18 12:32:05	12/20/18 12:33:36	Yes;	Outlook;OneDrive;	Yes	OneDrive for Business	Yes	Classroom Based training
14	14	12/20/18 12:54:11	12/20/18 12:55:19	Yes;	Outlook;Word;	No		Yes	Classroom Based training
15	15	12/20/18 12:57:06	12/20/18 12:58:24	No;		No		No	
16	16	12/20/18 12:59:04	12/20/18 13:07:36	Yes;	Outlook;Word;Excel;	No		Yes	Customised On-line training
17	17	12/20/18 13:55:22	12/20/18 13:58:25	No;	Outlook;Word;Excel;	No		No	
18	18	12/20/18 15:37:11	12/20/18 15:37:45	No;		No		No	
19	19	12/20/18 15:45:30	12/20/18 15:47:21	No;		No		Yes	Classroom Based training
20	20	12/21/18 10:33:43	12/21/18 10:35:11	Yes;	Outlook;Word;Excel;	No		Yes	Classroom Based training
21	21	12/21/18 10:37:37	12/21/18 10:38:47	Yes;	Outlook;	No		No	
22	22	12/21/18 10:56:40	12/21/18 10:58:10	Yes;	Outlook;Word;Excel;	No		Yes	Classroom Based training
23	23	1/3/19 10:41:41	1/3/19 10:44:42	Yes;	Outlook;Word;Excel;	No		No	Customised On-line training
24	24	1/11/19 13:36:27	1/11/19 13:41:59	Yes;	Outlook;Word;Excel;	No		No	
25	25	1/11/19 16:12:23	1/11/19 16:13:46	No;		No		Yes	Customised On-line training
26	26	1/11/19 16:08:00	1/11/19 16:15:54	No;	Outlook;Word;Excel;	No		Yes	Customised On-line training
27	27								

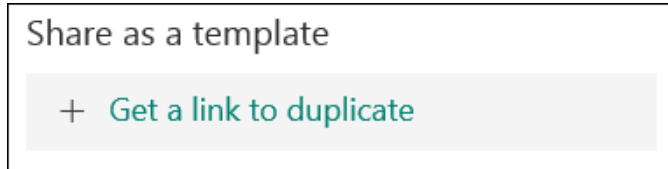
- Each question in your form is a column and each response become a row in the Excel workbook. The first four columns display the start time and completion times for each response, and the name and email address for each responder (Names and email addresses of anonymous students won't be displayed if you allow your form to accept anonymous responses). The subsequent columns display that responder's selections.

**Note:** Any changes you make to the form data in Excel won't modify the content of the response table.

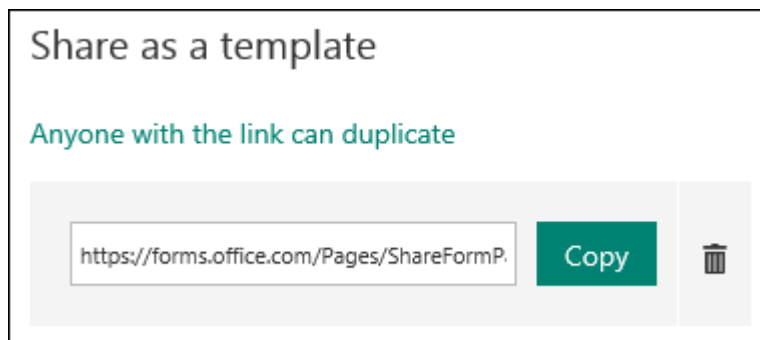
## Share as a template

You can easily share a form as a template so that colleagues can duplicate it and use it as their own. When you make a copy of a form, the copy exists in your profile. When you share a form as a template, you create a special link which allows others to duplicate the form in their own profile where they can make changes to it. A duplicated form created through a template link doesn't contain any response data.

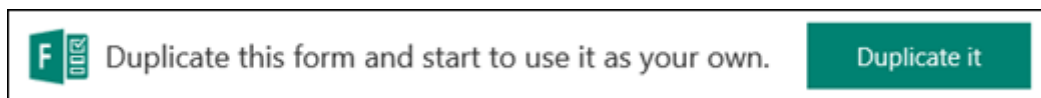
- In Microsoft Forms, open the form you want to share as a template and click **Share**.
- On the Share pane, click **Get a link to duplicate**.



- Click **Copy** next to the text box that displays a form URL.



- Paste this link wherever your intended audience can see and click it or send it to someone else through email.
- When another person navigates to that form URL, have them click **Duplicate** it at the top or bottom of the form to create a copy of the form in their own profile which they can modify to their needs.



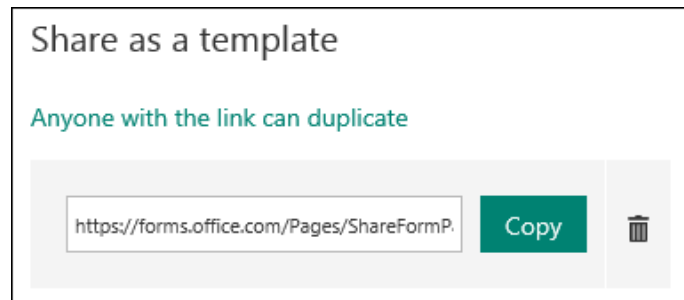
- When you share a form as a template, only the structure of the quiz or form is duplicated. No existing response data is carried over to the new form when someone else duplicates it.

## Delete a template link

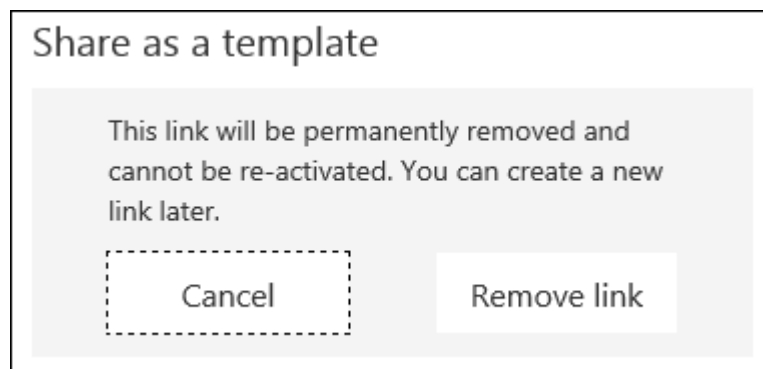
If you no longer want the link to be accessed

- In Microsoft Forms, open the form which includes a template link and click **Share**.

- On the Share pane, click the Delete trash can button next to the text box that displays a form URL.



- Microsoft Forms displays a confirmation message. Click Remove link to remove the template link. Click Cancel if you change your mind here and don't want to remove the template link. Once removed, you can't recreate the same template link.



- When other users now try to duplicate your form through the template link, they'll see an error page. You can always create another new template link for your form if needed but it will be a new unique link. You'll need to send the new template link to other people for them to continue duplicating your existing form.

## Share to Collaborate

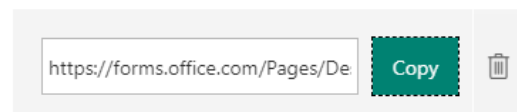
In Microsoft Forms, you can have multiple people collaborate on the forms. When you share a form to collaborate, you create a special link which allows others to view and make changes to the design of a quiz or form you started. All contributors to your form can also view, edit, and delete responses. Contributors can also share the form with others by sending them the form collaborate link.

In Microsoft Forms, open the form you want to share to collaborate and click **Share**.

Share to collaborate

Only people in my organization can view and edit ▼

On the Share pane, click Get a link to view and edit.

A screenshot of the Microsoft Forms share pane. It shows a text box containing the URL 'https://forms.office.com/Pages/De', a green 'Copy' button, and a trash icon.

### Important Note

As an alternative if you need to collaborate on a form it may be useful to do so in Teams or Groups. Using Teams or Groups will ensure that the data gathered will remain in UCC rather than within an individual's Office 365 user account should the individual leave UCC.

## Embedding a form on your UCC website

Many systems provide embed code. Embed code allows you to insert your form directly into your UCC Website using the TerminalFour Content Management System (CMS).

See UCCs Digital Estate Working Group (DEWG) website for further information on how to embed a form <https://www.ucc.ie/en/dewg/resources/forms/>

[illegible]