

# Office 365 Forms



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## What is Office 365 Forms

Office 365 Forms allows users easily and quickly create surveys, quizzes, and polls. Although, Office 365 Forms was designed specifically with educators in mind, it has been proven to be useful for other users to create effective forms/quizzes for their use. For faculty members, Office 365 Forms can be used to create quizzes, collect feedback from students, colleagues and parents, or plan class and staff activities. In business organizations, Office 365 Forms can be used as a tool to collect customer feedback, measure employee satisfaction, improve business or products, or organize company events.

In this training course, we will demonstrate how to get started using Office 365 Forms to quickly and easily collect information. We will walk through the key features, including how to create a Form/Quiz, how to distribute a Form/Quiz, as well as learn how to collect and review data from participant responses. Throughout this training we will refer to Forms as Office 365 Forms.

Office 365 Forms has proven to be a useful tool for several reasons:

- Quickly and easily create surveys, registrations, and quizzes
- Forms/Quizzes are accessible on mobile devices
- Responses can be from authenticated and anonymous users
- Immediate grading functionality for quizzes
- Data can easily be extracted into Excel and other systems for analytical purposes

### Objectives

This training session will allow users the ability to:

- Create new Forms and Quizzes.
- Manage forms via format and branding.
- View and analyze response data collected via Forms.

## Office 365 Forms vs. Google Forms

Although both Office 365 Forms and Google Forms were both developed to allow users to focus on their task rather than the complexities of a database; they are very much alike with only a few differences. Both allow the ease of creating surveys, quizzes and polls. Each allowing the option of sharing and collaboration. When compared side by side there a minimal differences.

<b>Task</b>	<b>Office 365 Forms</b>	<b>Google Forms</b>
Preview Form using Desktop or Mobile	Yes	No
Organize questions into multiple pages	Yes	Yes
Set start and end dates at specific times for when the form is open or closed for access	Yes	No
View average completion time for the form	Yes	No
Organize form elements into sections	Yes	Yes

## Signing In

To access Office 365 Forms sign in by opening a web browser and going to [Microsoft 365 Account](#). Google Chrome or Mozilla Firefox are recommended browsers to use.

Click in the first field to enter your Winston-Salem State University account, using the fully qualified username: (See Figure 1) username@wssu.edu.

Note that all logins for all Office 365 products should be entered using the “**username@wssu.edu**” format.

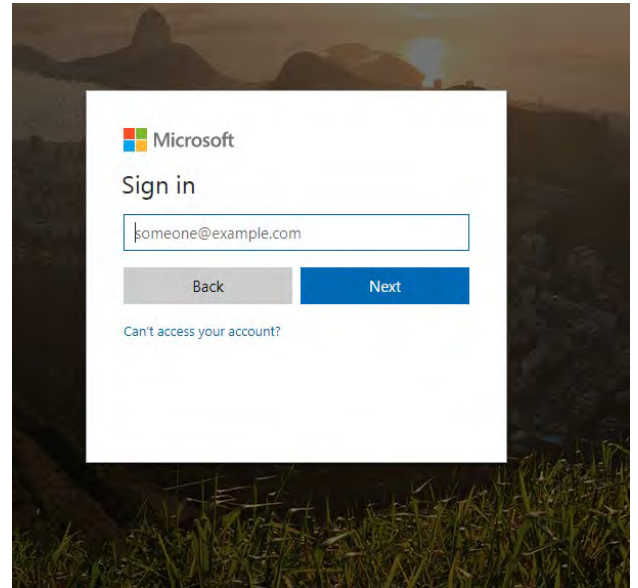


Figure 1 - Office 365 Sign In

When you click **Next**, you will be re-directed to the Winston-Salem State University's Office 365 sign-in page. Enter your University password and click **Sign in**. (See Figure 2)

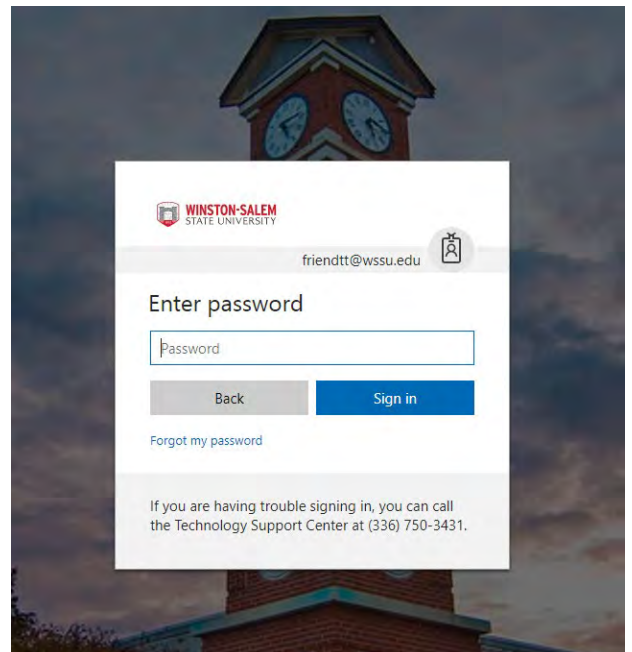


Figure 2 - WSSU Office 365 Sign In

## The Office 365 Interface

Initial login is directed to the main apps landing page. (See *Figure 3*) From the landing page users can access the following features:

- The **application tiles** for opening the range of available Office 365 apps
- The **Install** button for downloading and installing the latest version of Office software onto personal devices, which is located below Search field.

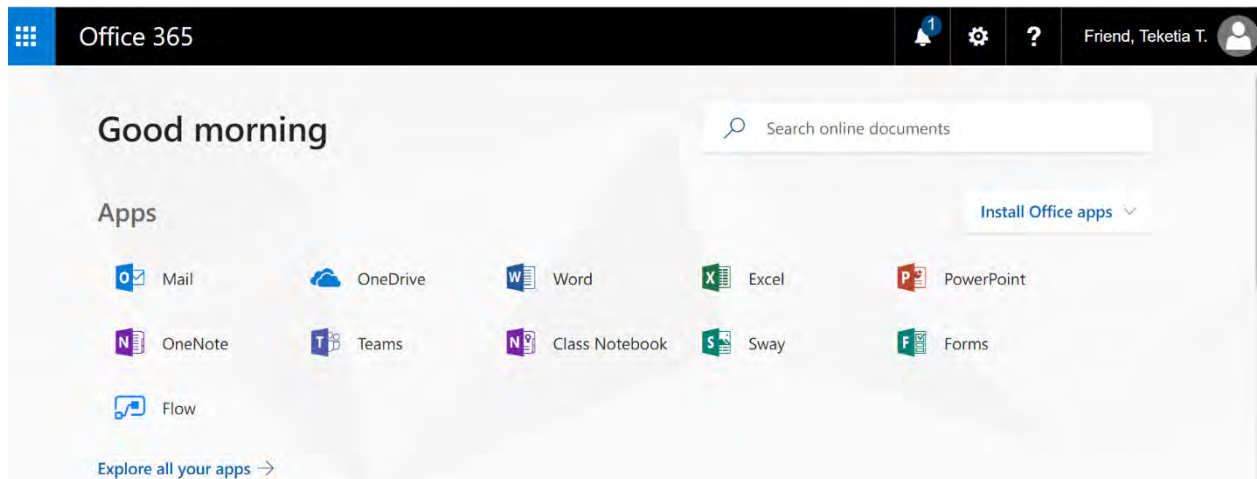



Figure 3 – Office 365 App Tiles

## Forms App & Creation of New Form

Open Office 365 Forms by clicking the **Forms** tile on the Office 365 landing page or by selecting Forms from the **Quick App launcher** (the grid icon in the top left hand corner) .

The Office 365 Forms Quick Launch bar gives the options to Preview a Form/Quiz, *Apply a Theme* to a Form/Quiz, *Share* a Form/Quiz. (See *Figure 4*)



Figure 4 - Office 365 Forms Command Bar

The Ellipses (...) on the Forms Command bar offer the option to edit *Settings*. (See *Figure 5*) Authors can setup functions for a Form/Quiz. Authors can allow the Form/Quiz to “*Show results automatically*”, allow “*Anyone with the link to respond*” to the Form/Quiz; which will only return anonymous responses or allow “*Only people in my organization can respond*”; which will record and include the names and email addresses of the participants; as well as restrict responses to one response per participant.

At this time the university faculty, staff and students are grouped in separate permission groups. Although faculty, staff and students can collaborate within OneDrive for Business; they are not able to collaborate within Forms. All forms and quizzes created requesting student responses will have to be

added the student tenant or the form will have to be set to allow “Anyone with the link to respond” and additional fields can be added to the form to record the names for each response.

The option to allow a certain date and time range for when responses can be accepted can be enabled; as well as to “Shuffle questions” “Lock questions” and “Email notifications for each response” can all be done in the Settings window. (See Figure 6)

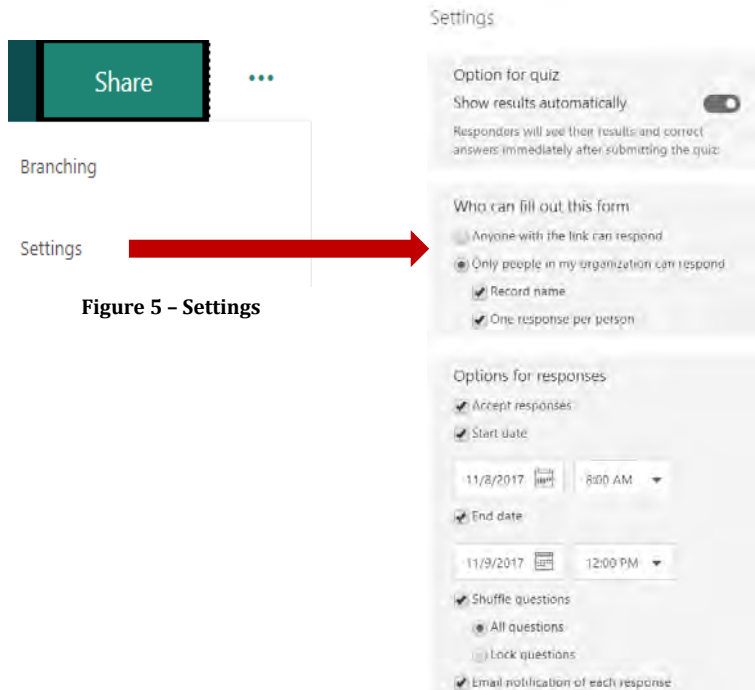


Figure 5 – Settings

Figure 6 – Settings Options

Office 365 Forms offers two types of Forms. **Forms** which allow users to create surveys, polls, registrations, and **Quizzes** which allow users to create quizzes for any subject. Under the **My Forms** tab click **New Form** or **New Quiz** to begin creating a new form/quiz. (See Figure 7)

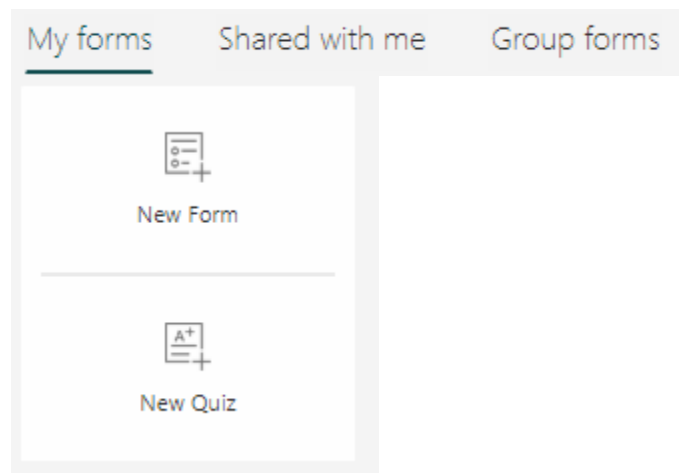


Figure 7 – Forms New Form/Quiz

Assign a **Title** to the Form/Quiz. The title field has a character limit of 90. A **Subtitle** field is optional to add a description or subtitle to the form/quiz. The Subtitle field has a character limit of 1000. Questions

can be added to Forms/Quizzes by clicking the **Add Question** button as seen in the question setup window. (See *Figure 8*)

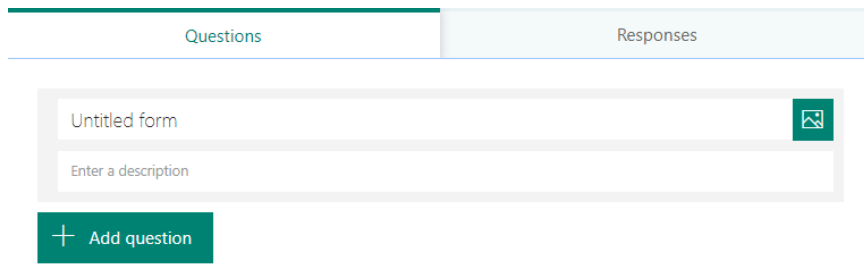


Figure 8 – Forms Title & Subtitle Fields

## Forms Question Types

Question types are determined by the type of functionality the user would like to use for each question within the form/quiz. (See *Figure 9*).

In the “*Forms Question Examples*” section we will review the setup of sample question for each question type of Office 365 Forms. To create a new question we will begin by clicking the **Add question** button and selecting the question the preferred question type of the *Choice, Text, Rating, Date, Ranking or Likert* as the question type; each time a new question is created. (See *Figure 9*)



Figure 9 – Office 365 Forms Question Types

## Forms Question Examples

### Choice

Choice questions allow users to create a multiple choice question that allows a single answer or multiple answers. *Choice Form/Quiz* questions users can mark the correct answer(s) to be displayed with a comment for quizzes. *Choice questions give users the ability to include Math functionality for questions and answers on Quiz forms.*

1. Click the **Add question** button to add a new question to the Form/Quiz.
2. Select **Choice** as the question type.
3. Enter the question text in the question field.



**Note:** An additional text field may be added for questions by clicking the **Subtitle** option. (See Figure 10)

4. Click the **Add option** button to add additional answer options for a question. (Two answer fields are given by default). (See Figure 10)
5. Click the **Add option** to add additional answer fields to a question.
6. Click **Shuffle Options** to reorder the answer options each time the Form/Quiz is refreshed. (Figure 10)

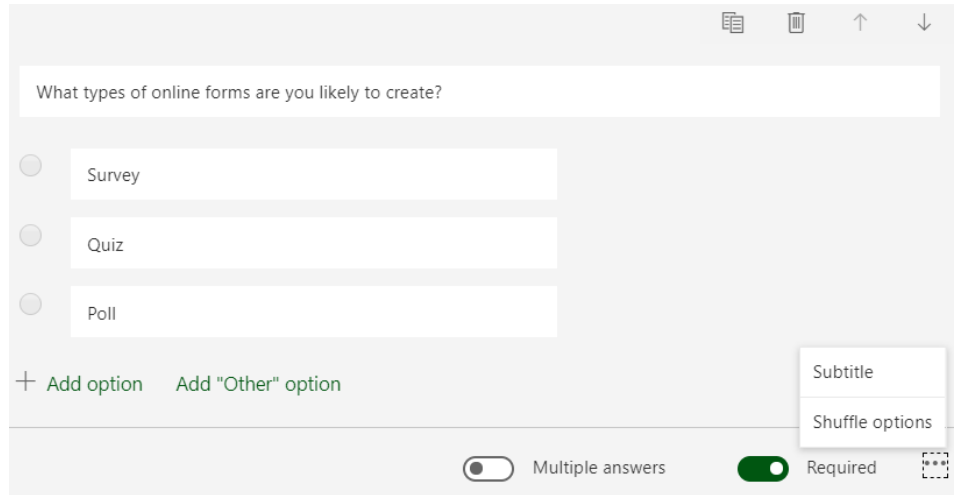


Figure 10 - Office 365 Form "Choice" question type

7. To provide the end user an opportunity to enter their own individual answer option users can select **Add "Other" Option**. This inserts an option of "Other" textbox which the participants can select and fill in an answer (See Figure 11).

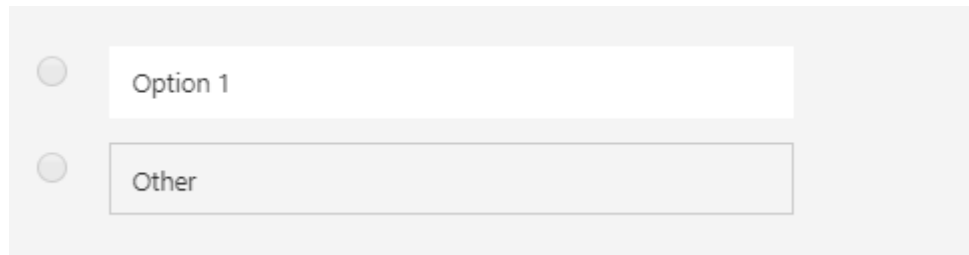


Figure 11 - Office 365 Forms adding answer option

8. The option for multiple answers can be done by selecting the **Multiple answers** swipe button (See Figure 12). Setting a question to be required can be done by selecting the **Required** swipe button (See Figure 14) which requires participants to provide an answer to the question before moving to the next question or completing the form. The order of the answer options can be shuffled upon refreshing of the form/quiz for each use and subtitles can be added to allow descriptions or additional text for the question text. (See Figure 13)



Figure 12 - Office 365 Forms Multiple/Required options  
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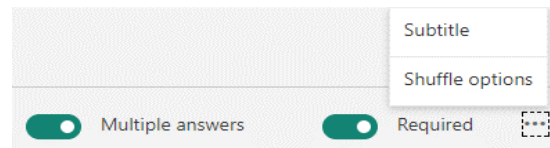


Figure 13 Office 365 Forms Subtitles & Shuffle options  
Office 365 Forms

When using the “**Multiple answers**” option the radio selection buttons for the answers field will change to check boxes, as seen below (Figure 14)

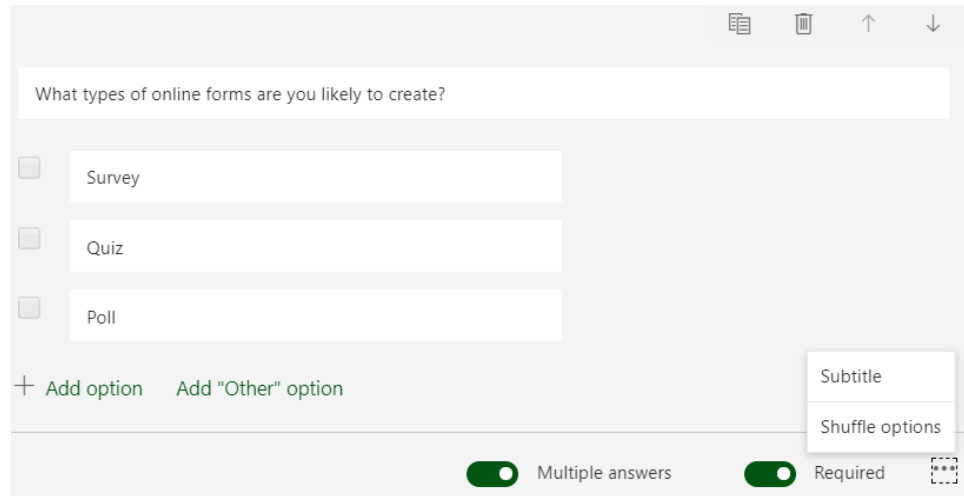







Figure 14 -Office 365 Forms Multiple Options Enabled

All questions share common features that can be used for every question type in Office 365 Forms. All questions have a question text field with a character limit of 4000. All questions have the option to add an image or media clip to be used as a part of each individual question.  A toolbar in the top right corner of each question give the options to copy or duplicate a question by clicking the Copy icon ; delete questions by clicking the delete icon  or questions can be moved up or down to change the position on the form/quiz by clicking the up and down arrow icon . In the bottom right corner all questions in Office 365 Forms can be marked as “Required”  Required, and each have the option of adding a Subtitle to each question.

### Text

Text type questions can be used for Essay questions or questions which users want to add media. The add media is a recent addition to the Office 365 Forms application and allows users to insert graphics or video a form/quiz.

1. Enter the question text into the question text box
2. A slide button option is available for this type of question called **Long answer** which enables the participant(s) to enter a paragraph answer instead of a single line answer (See Figure 15).

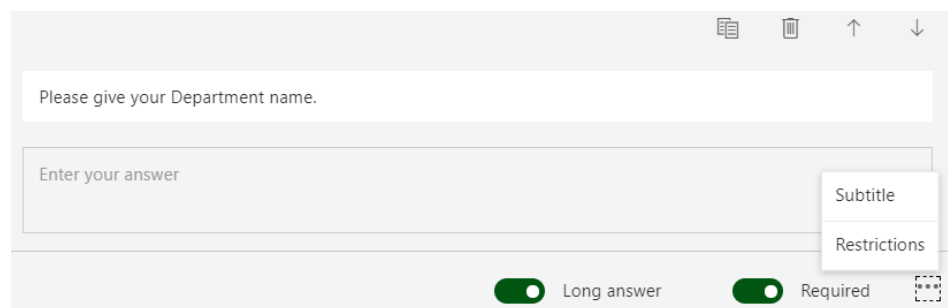


Figure 15 – Text question type Long answer enabled

## Rating

Rating type questions are best for survey type forms where participants are asked to rate a question on a custom scale.

1. Enter the text for the question into the question text box.
2. Select the Levels from the two options of 5 or 10.
3. Select the **Symbol** of Stars or Numbers to represent the Rating
4. Users are also given the choice of adding a label to the lowest and highest options to provide a visual description of measurement rating to the users. (See *Figure 16*)

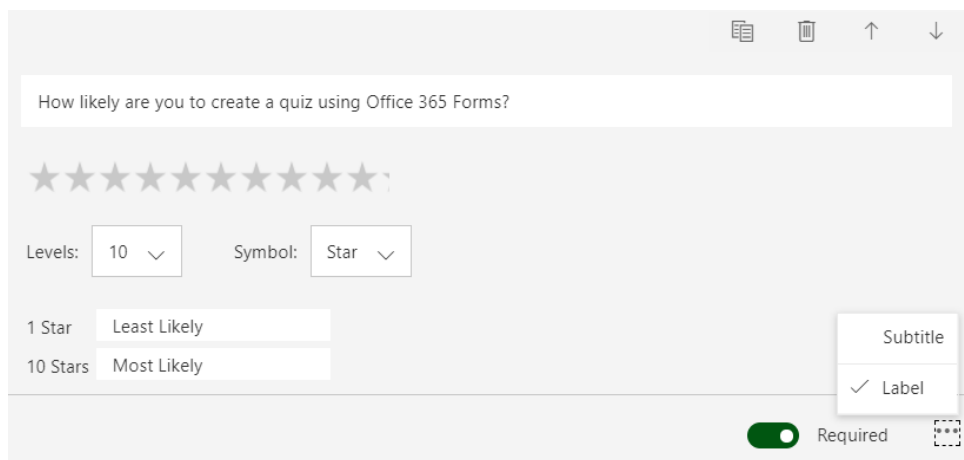
The screenshot shows the configuration interface for a Rating question in Office 365 Forms. At the top, there is a text box containing the question: "How likely are you to create a quiz using Office 365 Forms?". Below the text box is a visual representation of a 10-star rating scale. Underneath the scale, there are two dropdown menus: "Levels" set to "10" and "Symbol" set to "Star". Below these are two input fields for labels: "1 Star" with the text "Least Likely" and "10 Stars" with the text "Most Likely". To the right, there is a "Subtitle" field and a checked "Label" checkbox. At the bottom right, there is a "Required" toggle switch which is turned on, and a grid icon.

Figure 16 – Office 365 Forms Rating question type

## Date

Date type questions as the name suggests allows the author to create questions which only a date will be required and accepted in a calendar date format. The participant is provided with a date box, which they can select the correct date for the question from a calendar within Forms. This is useful in surveys or other form types where you need to collect data for a date associated with the question.

1. Enter the text for the question into the question textbox.  
**Note:** Only one field for the date to be entered by the user will be displayed. Users may select the date from the calendar which will be displayed. (See *Figure 17*)

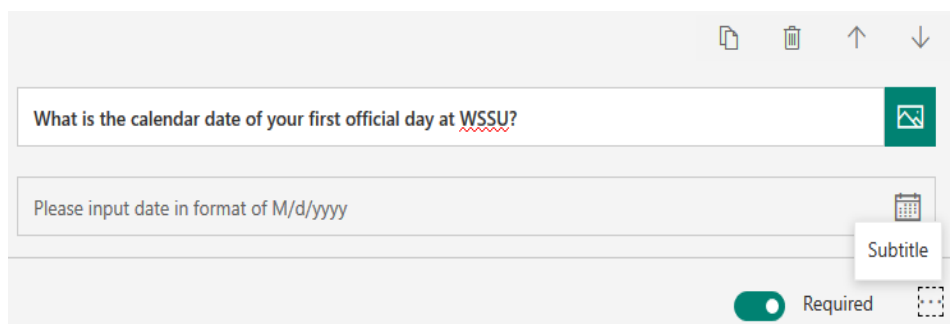
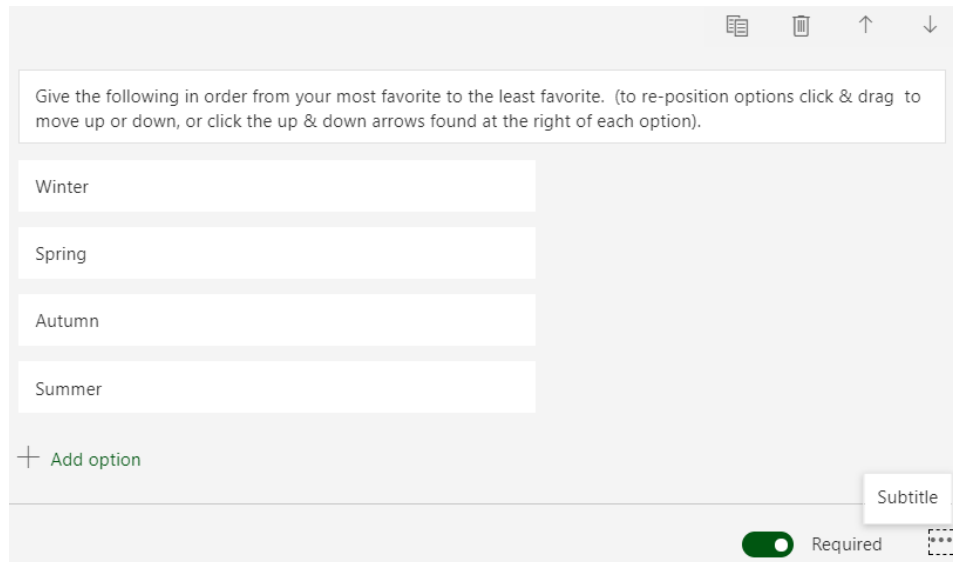
The screenshot shows the configuration interface for a Date question in Office 365 Forms. At the top, there is a text box containing the question: "What is the calendar date of your first official day at WSSU?". Below the text box is a date input field with the placeholder text "Please input date in format of M/d/yyyy". To the right of the date input field is a calendar icon. Below the date input field, there is a "Subtitle" field. At the bottom right, there is a "Required" toggle switch which is turned on, and a grid icon.

Figure 17 – Office 365 Forms Date question type

## Ranking

Ranking questions allow Form/Quiz authors to ask participants to rank answer choices in a particular order. Responses can be collected and visualized for easy analysis.

1. Enter text for the question into the question textbox.
2. Enter text for each answer option. (See *Figure 18*)



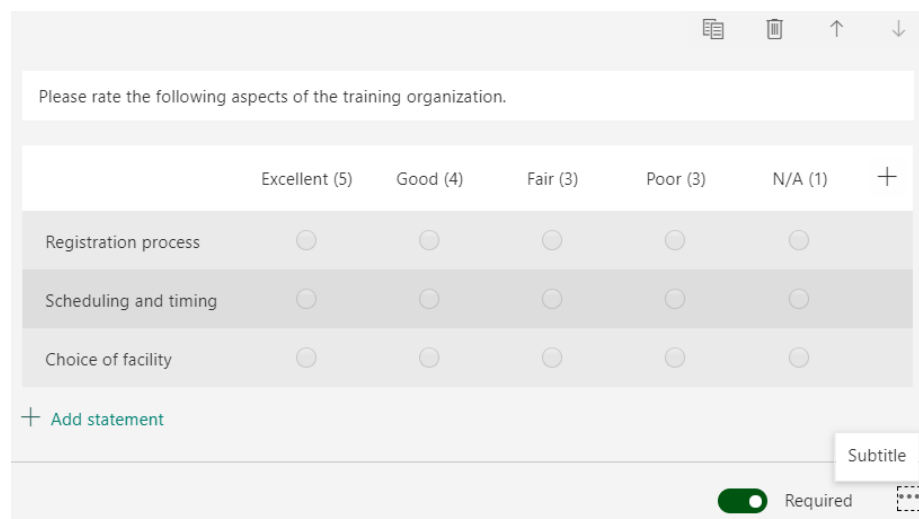
The screenshot shows the configuration interface for a ranking question in Office 365 Forms. At the top, there is a question text box containing the text: "Give the following in order from your most favorite to the least favorite. (to re-position options click & drag to move up or down, or click the up & down arrows found at the right of each option)." Below the question text are four answer options: "Winter", "Spring", "Autumn", and "Summer", each in a separate input field. To the right of each option are small up and down arrow icons for re-ordering. Below the options is a "+ Add option" button. At the bottom right, there is a "Subtitle" label, a "Required" toggle switch (which is turned on), and a dashed box icon for the question type.

Figure 18 - Office 365 Forms Ranking question type

## Likert

Likert give users the option to provide responses for matrix/rating scale multi-grid and multi-choice question types. This question type provides the functionality found in popular survey creation programs such as Adobe Forms and Survey Monkey.

1. Enter text for the question into the question textbox.
2. Enter text for each answer option. (See *Figure 19*)



The screenshot shows the configuration interface for a Likert question in Office 365 Forms. At the top, there is a question text box containing the text: "Please rate the following aspects of the training organization." Below the question text is a table with five columns representing rating scales: "Excellent (5)", "Good (4)", "Fair (3)", "Poor (3)", and "N/A (1)". Each column has a radio button. To the right of the table is a "+ Add statement" button. At the bottom right, there is a "Subtitle" label, a "Required" toggle switch (which is turned on), and a dashed box icon for the question type.

	Excellent (5)	Good (4)	Fair (3)	Poor (3)	N/A (1)	
Registration process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Scheduling and timing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Choice of facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Figure 19 - Office 365 Likert question type

## Net Promoter Score

The Net Promoter Score question allows users to easily measure customer experiences and predict business growth.

1. Enter text for the question into the question textbox..
2. Enter text for the Labels for the scale of 0 to 10. (See *Figure 20*)

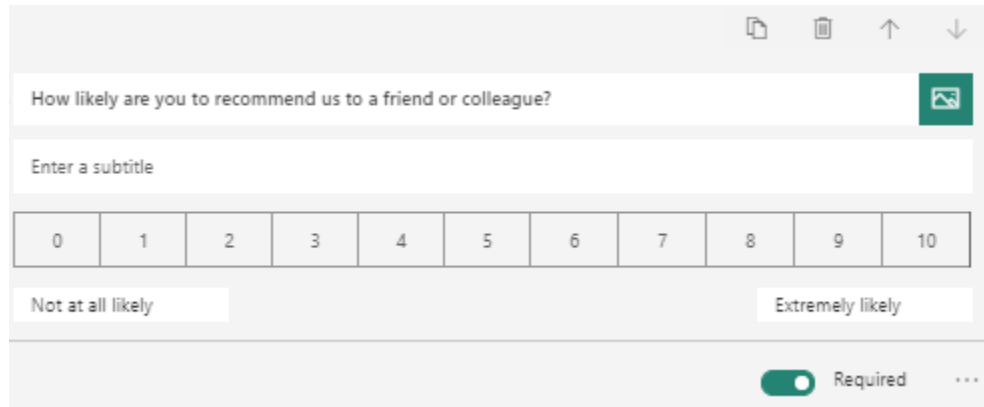
The image shows the configuration interface for a Net Promoter Score question in Office 365 Forms. At the top, there are icons for copy, delete, up, and down. Below that is a text box containing the question: "How likely are you to recommend us to a friend or colleague?". To the right of this text box is a green icon for adding an image. Underneath is a subtitle field with the placeholder text "Enter a subtitle". The main part of the interface is a horizontal scale from 0 to 10, where each number is in its own box. Below the scale, there are two text boxes: "Not at all likely" on the left and "Extremely likely" on the right. At the bottom right, there is a toggle switch labeled "Required" which is currently turned on, and a three-dot menu icon.

Figure 20 - Office 365 Net Promoter Score question type

## Sections

If you're creating a lengthy survey or questionnaire, it's helpful to organize your questions into multiple pages—or sections—which you can easily rearrange and reorder. Sections also help orient your form responders consume a long survey that has been organized into smaller parts. Clicking on **More settings for section \*\*\*** in the upper right corner of the section allows users to *Duplicate*, *Remove* or *Move* a section. (See *Figure 21*)

- **Duplicate section** - Make a copy of the questions within that section.
- **Remove section** - Click **Just section** to remove just the section header, or select **Section and questions** to remove the section and all questions within it.
- **Move section** - Use the **Move up** and **Move down** arrows to rearrange the order of your sections.

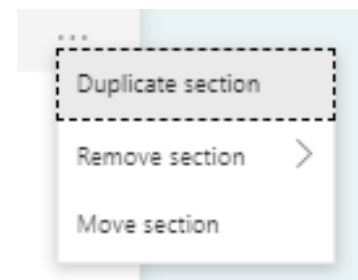


Figure 21 - Forms Sections Options

*Note: Branching and shuffle question features are disabled when users include Sections in their form.*

All Forms/Quizzes produced are optimized for both desktop and mobile viewing.  
 (See Figure 22 & Figure 23)

Office 365 Forms Training - Sample

\* Required

1. What forms are you likely to create using the Office 365 Forms App?

Survey

Poll

Quiz

2. Please give your Department name. \*

Enter your answer

3. How likely are you to create a quiz using Office 365 Forms? \*

Not Likely ★★★★★★★★★★ Very Likely

4. What is the calendar date of your first official day at WSSU? \*

Please input date in format of M/d/yyyy

5. Give the following in order from your most favorite to the least favorite. (to re-position options click & drag to move up or down, or click the up & down arrows found at the right of each option). \*

Fall

Spring

Winter

Summer

6. Please rate the following aspects of the training organization. \*

	Good(4)	Fair(3)	Poor(2)	Unacceptable(1)
Registration process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduling and timing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Choice of facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Submit

Figure 22 - Office 365 Forms Computer Preview

Office 365 Forms Training - Sample

\* Required

1. What forms are you likely to create using the Office 365 Forms App?

Survey

Poll

Quiz

2. Please give your Department name. \*

Enter your answer

Figure 23 - Office 365 Forms Mobile Preview

## Sharing a Forms Document

Once the completed set of questions is complete, the Form/Quiz can be shared others by clicking the **Share** tab in the Forms command bar. Sharing with participants within the W.S.S.U. domain will allow the names and email addresses of the respondents to be collected. Forms/Quizzes can also be shared with individuals outside of the W.S.S.U. domain; but all responses will show as being anonymously submitted. (See *Figure 24*)

The **Copy and Paste the Link**: will produce a public facing URL for the Form/Quiz. The link can be shared with anyone to complete the Forms/Quizzes.

Generating a **Quick Response (QR) Code** that links to the Forms/Quizzes, allows users to download the QR code as an image. Recipients can scan the code using a phone or tablet to access the Form/Quiz. QR codes are quite useful with mobile devices.

Users can use the **Embed in a Webpage** to allow the form/quiz to be included directly in a webpage using the option to generate the HTML code needed to allow participants to complete the Form/Quiz within a website.

Using the **Email the Link** feature will generate a link for the Form/Quiz that is pre-pasted in the window of the default Mail client; that only requires a quick edit of the personal message to be sent to users the email is ready to send.

- Copy/paste the link
- Send a QR-code
- Embed the form into a blog or webpage
- Send the link via email
- Forms can be shared as templates with others to use for their use as duplicates
- Forms can be shared for collaboration

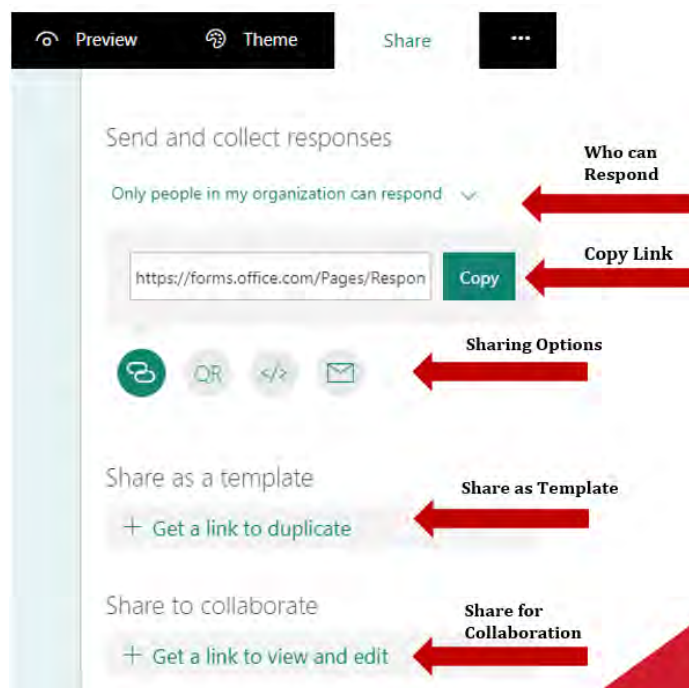


Figure 24 - Methods of Sharing an Office 365 Form

## Analyzing Data Responses for Forms

Office 365 Forms has a rich user interface and real – time analytics to display Form/Quiz summary details as well as individual question response details for Forms/Quizzes. All the data received from participants completing Forms/Quizzes is stored and can be viewed on the **Responses** tab. (See *Figure 25*)

There are three different methods of viewing the responses of a form.

- Summary report from Response tab
- Microsoft Excel export
- Individual view from each question

To view a Summary of responses:

1. Open the active Form/Quiz
2. Click on the **Responses** tab.

At the top of the screen, the summary details will be displayed for the Form/Quiz. Users will be able to view **Responses**, **Average time to complete** and **Status**. The number of responses received for the Forms/Quizzes on the Responses tab (See *Figure 23*) which shows the **30** count icon. Each form can receive a maximum of 5000 responses. There is a **Review answers** button **1**, a **Post scores** button **2** and a link for **Open in Excel**. (See *Figure 25*).

Data from responses can be exported to Microsoft Excel for further analysis. Office 365 Forms has a feature to delete the responses and print the summary of the form

Data responses can also be viewed in the Microsoft Excel desktop version. To view response details in Microsoft Excel, click on the **Open in Excel** link in the Response tab view. (See *Figure 25*)

Clicking the **ellipses** in the Responses view window offers the options to *Delete all responses*, *Print summary*, and *Create a summary link*. (See *Figure 26*). The option to Create a summary link will display a new page containing a full summary of all responses for the form/quiz without the “More Details” and “Export to Excel” links; but with individual results for each participant’s response.

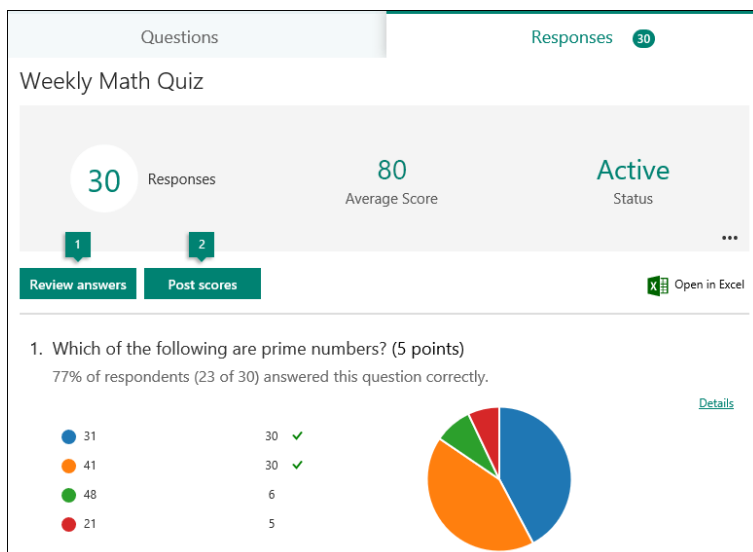


Figure 25- Office 365 Forms Response Data Analysis

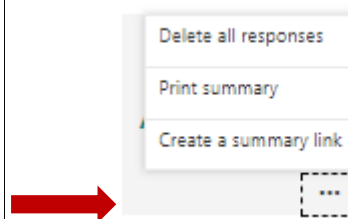


Figure 26 - Office 365 Forms Response options



Individual questions details can be displayed from the **More Details** link (See *Figure 27*) for each question to show more in-depth details of how each individual participant answered the question. (See *Figure 28*)



**Figure 27 - Office 365 Forms Response**

1. What are the colors of the American Flag?

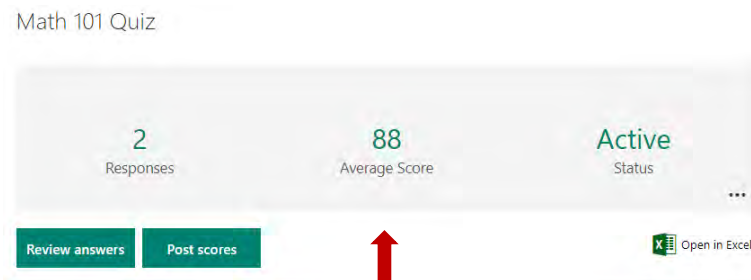
7 Responses

ID	Name	Responses	Result
1	Vivian Spencer	Red, White & Blue	✓
2	Tekelia Friend	Red, White & Blue	✓
3	Kealand Ford	Red, White & Blue	✓
4	Janice Smith	Red, White & Blue	✓
5	Derrick Hargrove	Red, White & Blue	✓
6	Cuthrell Johnson	Red, White & Blue	✓
7	Janice Smith	Red, White & Blue	✓

**Figure 28 - Forms: Response More Details**

### Analyzing Data in Excel

Open in Excel (See *Figure 29*) provides a table of columns of each participant who responded to the form/quiz. Columns will contain information such as the start time, end time, email address, name, total points of points were assigned for immediate grading, as well as a the total points earned, feedback and answers selected for each question. (See *Figure 30*)



**Figure 29- Forms Analyzing Data in Excel**

Start time	Completion time	Email	Name	Total points	Quiz feedback	Select the correct answer.5\times15	Points - Select the correct answer.5\times15
11/7/17 9:19:53	11/7/17 9:20:17	friendtt@wssu.edu	Tekelia Friend	75		75	25
11/7/17 10:48:55	11/7/17 10:50:13	johnsonco@wssu.edu	Cuthrell Johnson	100		75	25

**Figure 30 - Forms: Response Data in Excel**

Data analysis for exported responses can be performed in Excel from the simplest tables, charts and graphs to the more advanced macros, charting and reporting depending on the users' knowledge of Excel.

## Enhancing Forms and Quizzes

### Applying a Theme

Office 365 Forms allows you to change the background design and colors of your survey. At this time applying a theme to the form does not users to apply branding to be a form/quiz. To change the background design and color, you can follow below steps.

1. Open a Form/Quiz to apply or change the theme.
2. Click the **Theme** menu on the Forms command bar in the right corner of the design window
3. Select the desired background design/color for the Form/Quiz. (See *Figure 31*)

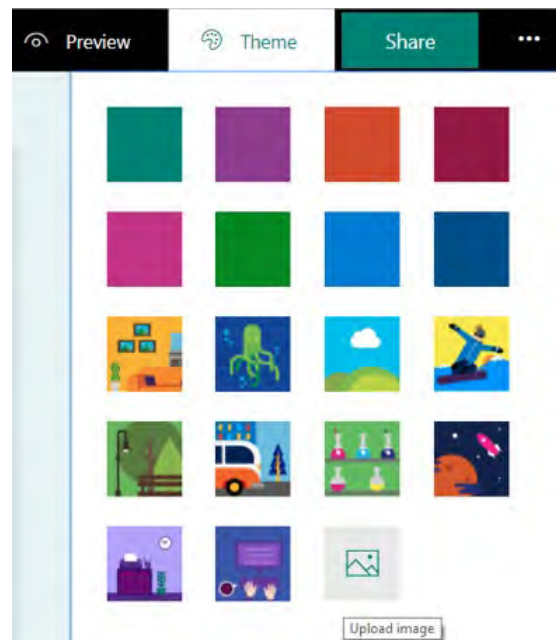


Figure 31 - Office 365 Forms Theme Options

4. Click the **Upload image** icon on the Themes menu to upload images to be used as a background from OneDrive, the Bing search field or uploaded from a personal computer. (See *Figure 32*)

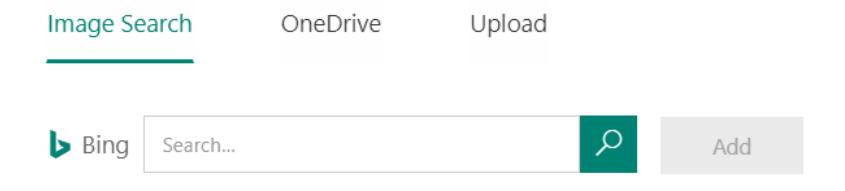


Figure 32 - Office 365 Forms Insert Image Options

## Branching

Branching logic can be added to a Form/Quiz that allows changes based on the responses to specific questions. When Forms/Quizzes are setup to use branching, the questions appear only if the question is relevant to the responder. If a particular question does not apply, the participant is redirected to a different group of questions or a group of questions will be skipped altogether. Branching is basically allowing the responses of one or more questions to determine the next action of the form. It is recommended that all questions are completed for the Form/Quiz before adding the branching functionality.

To add *Branching* to a Form/Quiz:

1. Click the ellipses icon on the Forms command bar and select **Branching** (See Figure 33)

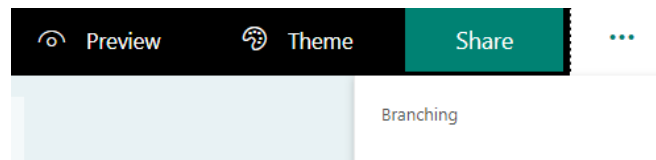


Figure 33 - Office 365 Forms Branching

The *Branching Option* page will display a branching option for each answer for every question. (See Figure 34)

2. Click the *Drop arrow* for each answer option to see the dropdown menu.
3. Select the function to be performed for each answer option for the question. The answer will determine the function of the branch.

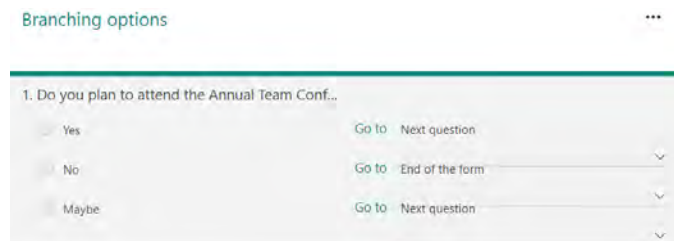


Figure 34 - Office 365 Forms Branching question

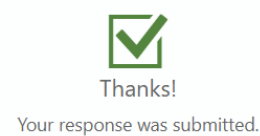
4. The dropdown menu contains a list all questions that follow on the Form/Quiz. For each possible response to the question, select the question that you wish to branch to.

For example the first question of the Form/Quiz as seen in (See Figure 35) will determine if the participant will continue to complete the Form/Quiz.

**Figure 35 - Office 365 Forms Branching example**

If a participant submits answers “Yes” or “Maybe” the form/quiz will direct them to the next question to complete and submit. If the participant submits “No” as their answer the Form/Quiz will be redirected to the final “Thank you” page. (See *Figure 37*)

**Figure 37 - Office 365 Forms: Branching condition**



**Figure 36 - Office 365 Forms Branching Submittal**

## Inserting Images and Media

Office 365 Forms allows users to insert an image or media file to a Form/Quiz header or individual questions for personalization. Users can insert a logo in the top left of the Form/Quiz header, or an image or videos can be added to individual questions. This step may be done by performing an *Image search* using the *Bing search engine*, *downloading an image from OneDrive*, or *uploading an image from a personal computer or mobile device*.

1. Open a Form/Quiz
2. Click the **Insert image** icon found in the Form/Quiz title field. The **Insert image** icon is also displayed in the question textbox. (See *Figure 38*)

**Figure 38 - Office 365 Insert Image**

3. Select **Image** or **Video** on the *Insert media* window (See Figure 39)

Insert media



Figure 39 - Office 365 Forms Insert media options

4. Select the source of the image from the (See Figure 40)

Image Search

OneDrive

Upload



Figure 40 - Office 365 Forms image/media source

Images can be inserted as a logo on a Form/Quiz to add branding or personalization. Images and media type files can also be inserted, (See *Figure 41* )



Figure 41 - Office 365 Forms Insert image example

or as a part of a question (See *Figure 42*)

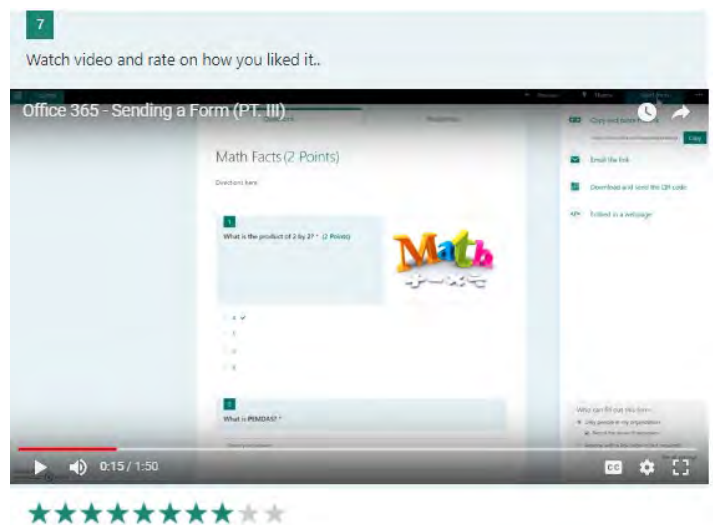


Figure 42 - Office 365 Forms Insert media/video example