


# Forms & Surveys

*Schoolwires<sup>®</sup> Centricity2<sup>™</sup>*



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## Overview

Use Forms and Surveys to create:

- Faculty and course evaluations
- Alumni contact information
- School safety surveys
- Community surveys
- Employee surveys
- Needs assessments
- Registration forms
- Opinion polls
- Community and adult education surveys
- Self-grading online quizzes and exams

## Examples

This screenshot shows a form titled "Personal Information" on "Page 1 of 2". It contains three sections:

- 1. Enter the following information:** Includes fields for Name, Address, Phone Number, and email. A note below states: "Enter at least 4 responses and no more than 4 responses: Enter at least 4 responses and no more than 4 responses."
- 2. Emergency Contact Information:** Includes fields for Emergency Contact and Emergency Phone Number. A note below states: "Enter at least 2 responses and no more than 2 responses: Enter at least 2 responses and no more than 2 responses."
- 3. What grade are you in?** A dropdown menu with "-- None --" selected.

At the bottom, there are two buttons: "NEXT >>" and "X CANCEL".

This screenshot shows a form titled "Food Services Survey" by "Lakepark SCHOOL DISTRICT" on "Page 1 of 1". It contains three questions:

- 1. How many times a week do you buy school lunch?** Radio button options: 1, 2, 3, 4, 5.
- 2. When you buy school lunch, how satisfied are you with the food?** A dropdown menu with "-- None --" selected.
- 3. What is your favorite school lunch meal?** Check as many as apply. Options include: Pizza, Chicken Parmesan, Spaghetti, Meatloaf, Hotdogs, and Other, please specify (with a text input field).

At the bottom, there are two buttons: "Done" and "Cancel".

## Creating 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 on a page by using the URL for the form.)



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

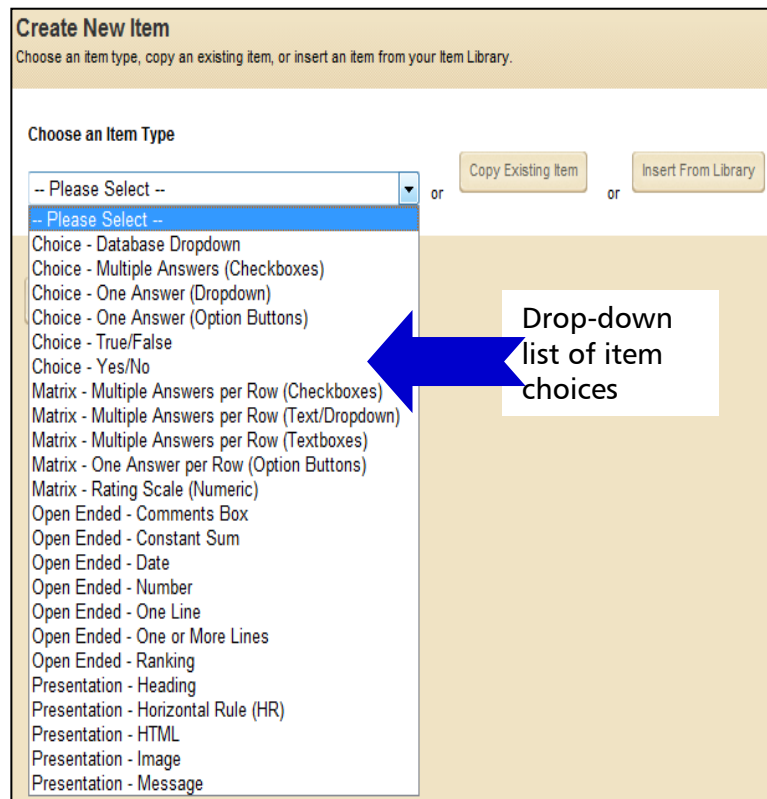
3) Enter a title for your new form or survey and choose whether to design a new form or copy from an existing form/survey. (Note: You will not be able to copy from an existing form until you have created at least one and made it active.)

4) Click on the form name to begin creating your form/survey.

5) Choose the *Insert* button to insert a new item (question or design element) in the form or survey.

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

6) Enter at least the required information for the item. (Required fields will have a red triangle in the upper right hand corner.) Click on the *Save* button. Your form will now display the first item entered.



- 7) Continue entering new items by using either of the following methods:
  - Click the *Insert* button beside an already created item. If you choose this method, you will be inserting an item above the current item.
  - Click the *Insert* button at the bottom of the window. If you choose this method, you will be inserting an item below the last item on the page.

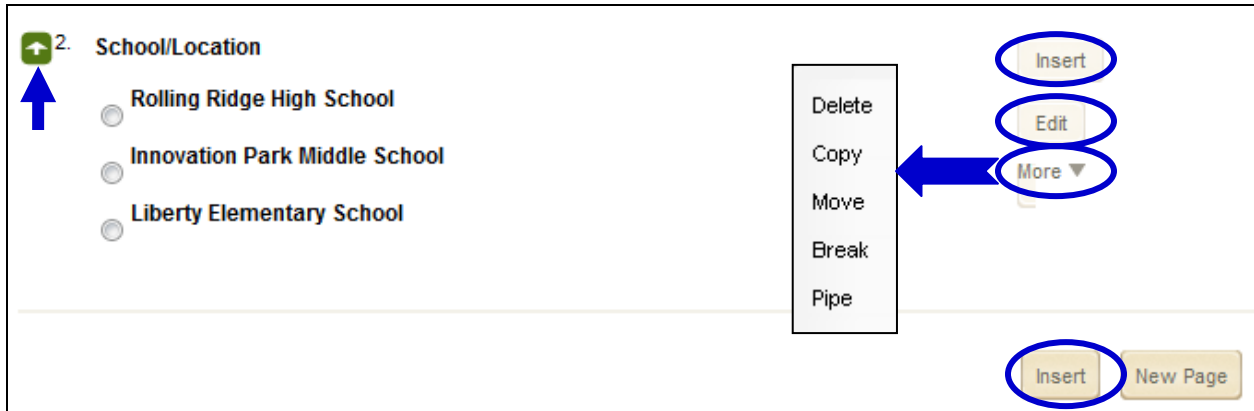


Figure 1

- 8) 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 [under the More drop-down menu]. (See Figure 1.)
- 9) Move items on a form or survey in one of two ways:
  - After clicking the More button, click on the *Move* button next to the item. (See Figure 1.) This method allows you 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 its current page.
- 10) 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 the More button next to an item to insert a page *Break* above that item. (See Figure 1.)
- 11) After clicking the More button, click on the Pipe button to take the answer from that item and place it on a subsequent page in your form. Note: You must have multiple pages in your form to use this feature. See below for an example. Figure 2 illustrates how the answers to previous questions in the form are inserted into the final page of the form. Figure 3 illustrates what the end-user will see after they have answered the questions.

```
<b>Here is a summary of your information</b><br><br>
<b>Contact Information:</b> ###268###<br>
<b>Parent Information:</b> ###269###<br>
<b>Telephone Numbers:</b> ###270###<br>
<b>Grade:</b> ###271###<br>
<b>Advisor:</b> ###272###<br>
<b>Type of School:</b> ###273###<br>
<b>Intended Major:</b> ###274###
```

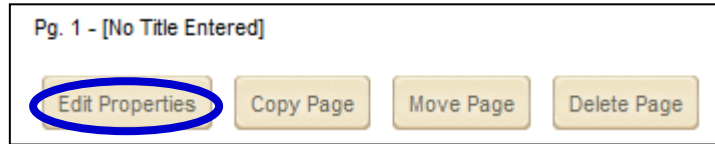
Figure 2: Presentation HTML using piping

**Here is a summary of your information**

**Contact Information:** Sally Brown  
**Parent Information:** Charlie & Lucy Brown  
**Telephone Numbers:** 814-555-5555; 814-555-5554  
**Grade:** 12  
**Advisor:** Mr. Smith  
**Type of School:** Urban, Suburban, Suburban  
**Intended Major:** Science, Mathematics, Computer Science

Figure 3: End-User View

12) 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.



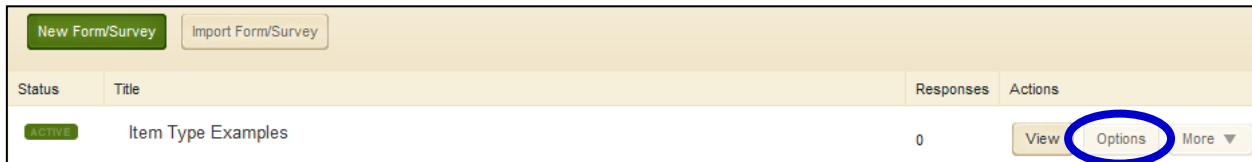
13) If you are interested in displaying questions selectively click on the Insert Conditions button. For example, if a user entered “yes” to a question on Page 1, Page 2 would display. On the other hand, if the user answered “no” to that same question on Page 1, Page 3 would display.



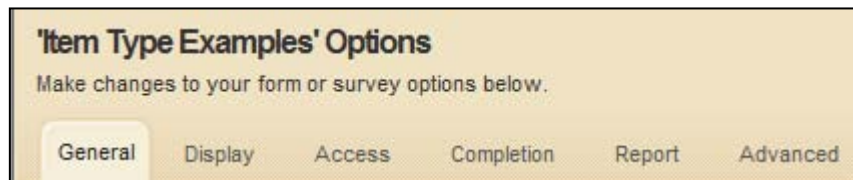
14) Preview the form by clicking the View button to the right of the form in the *Forms & Surveys* window. You can test each form by entering responses in the preview window.

### Adjusting Options for Forms & Surveys

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



2) Click on the Tab headings listed below in order to adjust the given options.



a. General


- i. Edit the name as required.
- ii. Change status. (It must be *Open* in order to be available to users.)
- iii. Contact Information: List owners of the survey to allow others to have access to the results.
- iv. Control start and end dates: The end date must be in the future to make the form accessible.

b. Display

- i. Choose a style: (The default style is automatically applied if a different style is not specified. Additional styles can be created in the Site/Subsite workspaces.)
- ii. Numbering Options: Number pages and questions as desired.
- iii. Navigation Options: Choose buttons to be displayed (back, cancel, etc.)

- c. Access
  - i. Choose Response Access and Submission options: Whether a login will be required and if responses can be updated.
  - ii. IP Address Validation: Restrict completion of survey to certain IP addresses.
  - iii. Control the total number of responses allowed for the survey in addition to the number of responses per person.
  - iv. Control the number of days the survey is available for a person to edit responses.
- d. Completion
  - i. Choose a Completion Action.
  - ii. Edit the *Completion Message* (if you selected this action).
  - iii. Fill in the *Completion URL* (if you selected this action) field to redirect the user to a certain page after filling out the form. By default, the browser will close after completing the form.
  - iv. Choose Button Display
    - 1. View Reports: Allows users to see an overview of the results once they have complete the survey.
    - 2. Print Response button: Allows users to print a copy of their results.
  - v. List persons to receive the responses to the surveys in the *Send To* field. You can enter multiple email addresses.
- e. Report
  - i. Format: Select the format in which to display the Results Overview Report.
  - ii. Security: Select “High” to allow only owners to view reports, “Semi-private” to allow all users to view overview results and only owners to view individual results, and “Public” to allow all users to view all reports.
  - iii. Highlight Responses
- f. Advanced: Hidden Fields: Can be added when there are 0 responses to your survey. Click Configure to add a hidden field. If your survey has responses, you will not see the Configure button.

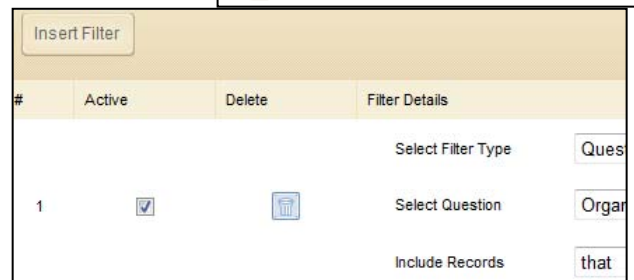
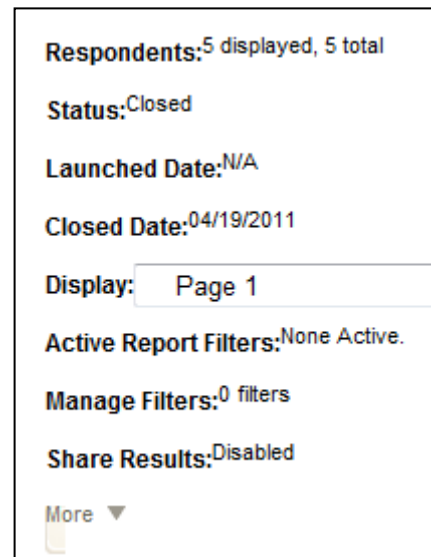
## Making Your Form Available For Completion

- 1) Once you have activated the form, you can insert a link to that 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 the View button of the form and copying the URL from the address bar. Note: The URL will be incorrect if the form is not active/open.

## Accessing and Reviewing Your Data

### First Method

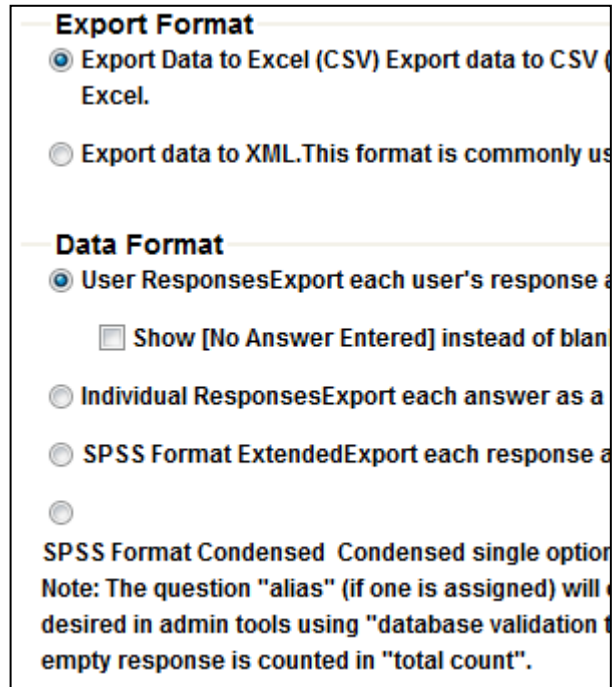
- 1) Click on the *Reports* tab in the *Forms & Surveys* window.
- 2) Select the desired form or survey from the drop-down list.
- 3) View individual responses by clicking on the *Individual Responses* button. You can also access an individual response by clicking the *View* button next to the response record.
- 4) View the overall results by clicking on the *Results Overview* button.
  - a. Choose data to display in the *Results Overview* window by selecting a choice from the *Display* drop-down menu.
  - b. Click on the *More* button to Manage Filters and Share Results.
    - i. Click on the *Insert Filter* button to specify the data for which you are filtering. You may insert more than one filter. Uncheck the box next to the filter to de-activate it.
    - ii. *Report Sharing* allows you to specify those with whom you would like to share Overview Results. You can share reports with others who do not have access to Forms & Surveys.





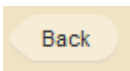
5) From the Results Overview window, export Data by clicking on the Export Data button. Data will be exported to a CSV file.

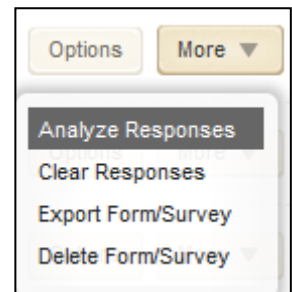
- a. Choose the Data Format option that you desire. Be sure to think about the question types that appear in your form or survey. For example, if you have used an Open-Ended multiple line item type, you may want to choose SPSS (Statistical Package for the Social Sciences) format in order to put each line of data into its own column.
- b. Click the desired checkboxes if you wish to include additional fields of response and/or user data. The Username will display when exported regardless of whether you check the box or not.
- c. Click on the *Export Data* button at the bottom of the window. You will be prompted to save or open the results file.



### Second Method

Click on the More drop-down next to the form and select *Analyze Responses* to go directly to the Results Overview.

NOTE: The Back button  (upper left hand corner) may aid navigation in the results area.



## Creating Styles for Forms & Surveys

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

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



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

4) Click on the *Save* button.

5) To edit a Style, click on the Style Name.

a. General Information

i. Select *Yes* from the *Public Use* dropdown menu if you would like other editors to be able to apply this style to other forms or surveys.

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

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

All fields marked with an asterisk (\*) are required.

**General Information**

**Template Name:\***

**Active:\***

**Public Use:\***

**Logo Path :**

**Logo Alignment:**

**Survey Alignment:**

**Borders and Colors**

**Matrix Header Color:**

b. Borders and Colors: Select colors for Matrix and Progress options. Adjust the background colors of the survey and page. Choose to display a border and select border options.

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.

## Creating an Item Library

Item Libraries are collections of items (questions) that you can share to allow editors to insert them into a form or survey. (Note: You must be a Site or Subsite Director to add items to Item Libraries.)

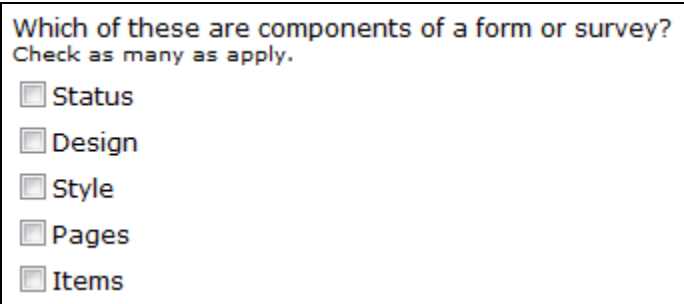
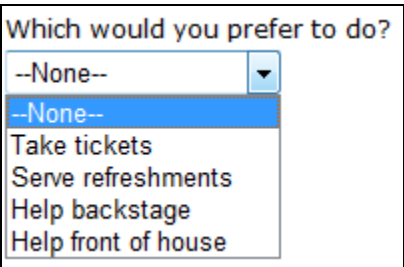
- 1) Click on the *Item Libraries* tab in the Site or Subsite *Forms & Surveys* window.
- 2) Click on the *New Item Library* button to create a new Item Library.
- 3) Give it a Title. Choose to make the Item Library Active or Shared. Making it active will make the items available for use and making it shared will allow other editors to insert items from the library in their forms or surveys. Click the *Save* button.
- 4) To edit Library, click on Library Name. Insert item types as 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 specific questions.
- ❖ Be sure not to create too many items on one page. Add multiple pages to minimize scrolling. Users will be able to click *next* to view your additional pages/items.
- ❖ When using piping, the piped answer must appear on a subsequent page.
- ❖ Status of a form must be changed to *Active* to allow data to be entered and recorded.
- ❖ You may not make extensive edits in a form without first clearing responses. Be sure to export the data first if you need to retain it.

**Table 1: Descriptions of Each Item Type**

Item Type	Example or Requirements	Random Answers?	Point Values?
<p><i>Database Drop-down</i></p>	<p><b>Here are the requirements:</b>                      To use this question type, all that is required is that the user enters a valid SQL statement and the database connection string. When using this question type, be extremely careful to ensure that the SQL entered will return results, and that the database connection information is valid. If either of these is incorrect, no data will be displayed. The SQL statement must contain two columns called "ItemValue" and "ItemDisplay". These two columns are used, respectively, as the value and the display text for each entry in the dropdown list. The correct way to make sure that your SQL contains columns with these two names is to use the "As" keyword in your SQL, as shown in the following example:                      SELECT state_code As ItemValue, state_name as ItemDisplay                      FROM tblState                      ORDER BY state_name                      If you wish to use the same column for both the value and text, simply select that column twice in your SQL statement, and alias it using the "As" keyword, as follows:                      SELECT state_code As ItemValue, state_code as ItemDisplay                      FROM tblState                      ORDER BY state_name                      The database connection string can be any valid DSN-less connection, or any valid DSN."</p>	<p>No</p>	<p>No</p>
<p><i>Choice-Multiple Answers (Checkboxes)</i></p>		<p>Yes</p>	<p>Yes</p>
<p><i>Choice-One Answer (Drop-Down)</i></p>		<p>Yes</p>	<p>Yes</p>

Item Type	Example or Requirements	Random Answers?	Point Values?																														
Choice-One Answer (Option Buttons)	<div style="border: 1px solid black; padding: 5px;"> <p>Let us know when you are available to help.</p> <p><input type="radio"/> 9 a.m. to 11 a.m.</p> <p><input type="radio"/> 11 a.m. to 1 p.m.</p> <p><input type="radio"/> 1 p.m. to 3 p.m.</p> <p><input type="radio"/> 3 p.m. to 5 p.m.</p> </div>	Yes	Yes																														
Choice-True/False	<div style="border: 1px solid black; padding: 5px;"> <p>You can have more than one form or survey associated with a style.</p> <p><input type="radio"/> True</p> <p><input type="radio"/> False</p> </div>	No	No																														
Choice-Yes/No	<div style="border: 1px solid black; padding: 5px;"> <p>Would you favor an all-day kindergarten?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> </div>	No	No																														
Matrix-Multiple Answers per Row (Checkboxes)	<div style="border: 1px solid black; padding: 5px;"> <p>You can answer as many times as you wish. Check as many as apply.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Answer 1</th> <th>Answer 2</th> <th>Answer 3</th> </tr> </thead> <tbody> <tr> <td>Question 1</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Question 2</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> </div>		Answer 1	Answer 2	Answer 3	Question 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Question 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	No																		
	Answer 1	Answer 2	Answer 3																														
Question 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																														
Question 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																														
Matrix-Multiple Answers per Row (Textboxes)	<div style="border: 1px solid black; padding: 5px;"> <p>List the names of all household members. Include anyone currently living in the house.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Relationship</th> </tr> </thead> <tbody> <tr> <td>Member One:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Member Two:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Member Three:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Member Four:</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table> </div>		Last Name	First Name	Relationship	Member One:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Member Two:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Member Three:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Member Four:	<input type="text"/>	<input type="text"/>	<input type="text"/>	Yes	No										
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Member Two:	<input type="text"/>	<input type="text"/>	<input type="text"/>																														
Member Three:	<input type="text"/>	<input type="text"/>	<input type="text"/>																														
Member Four:	<input type="text"/>	<input type="text"/>	<input type="text"/>																														
Matrix-One Answer per Row (Option Buttons)	<div style="border: 1px solid black; padding: 5px;"> <p>Rate your subjects. You can only choose one rating for each subject.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Very Easy</th> <th>Easy</th> <th>Neutral</th> <th>Difficult</th> <th>Very Diff</th> </tr> </thead> <tbody> <tr> <td>Math</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>English</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>Science</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>Physical Ed</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> </tbody> </table> </div>		Very Easy	Easy	Neutral	Difficult	Very Diff	Math	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	English	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Science	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Physical Ed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Yes	No
	Very Easy	Easy	Neutral	Difficult	Very Diff																												
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Science	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																												
Physical Ed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																												
Matrix-Rating Scale (Numeric)	<div style="border: 1px solid black; padding: 5px;"> <p>Rate these after school activities. Use 1 if you seldom participate and 5 if you participate all the time.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> </tr> </thead> <tbody> <tr> <td>Sports</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>Clubs</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>Volunteering</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>Lessons</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> </tbody> </table> </div>		1	2	3	4	5	Sports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Clubs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Volunteering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Lessons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Yes	No
	1	2	3	4	5																												
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Open Ended-Comments Box	<div style="border: 1px solid black; padding: 5px;"> <p>Please tell us what you think.</p> <div style="border: 1px solid gray; height: 60px; width: 100%;"></div> </div>	No	No																														

Item Type	Example or Requirements	Random Answers?	Point Values?
Open Ended-Constant Sum	<div style="border: 1px solid black; padding: 5px;"> <p>Please enter your page totals. The sum of the numbers entered must equal 100.</p> <p>Page One <input type="text"/></p> <p>Page Two <input type="text"/></p> <p>Page Three <input type="text"/></p> </div>	Yes	No
Open Ended-Date	<div style="border: 1px solid black; padding: 5px;"> <p>Enter your birthday.</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> <p>mm/dd/yyyy</p> </div>	No	No
Open Ended-Number	<div style="border: 1px solid black; padding: 5px;"> <p>What follows 999?</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> </div>	No	No
Open Ended-One Line	<div style="border: 1px solid black; padding: 5px;"> <p>First Name Please enter your first name.</p> <div style="border: 1px solid gray; padding: 2px;"> <input type="text"/> </div> </div>	No	No
Open Ended-One or More Lines	<div style="border: 1px solid black; padding: 5px;"> <p>Tell us:</p> <p>Street Address: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text"/></p> </div>	Yes	No
Open Ended-Ranking	<div style="border: 1px solid black; padding: 5px;"> <p>How would you rank the food in the cafeteria against the other two schools? Rank the items below, using numeric values starting with 1. Rank the items below, using numeric values starting with 1.</p> <p>HS <input type="text"/></p> <p>MS <input type="text"/></p> <p>EL <input type="text"/></p> </div>	Yes	No
Presentation-Heading	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <p><b>THIS IS A PRESENTATION HEADING</b></p> </div>	No	No
Presentation-Horizontal Rule	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <hr style="border: 1px solid black; width: 100%;"/> </div>	No	No
Presentation-HTML	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <p><b>HTML</b></p> <div style="border: 1px solid gray; padding: 2px; margin-top: 5px;"> <p>Code Use this field to enter any HTML and/or content. Text will be displayed using the HTML tags you enter.</p> <p>&lt;b&gt;HTML&lt;/b&gt;</p> </div> </div>	No	No
Presentation-Image	<div style="border: 1px solid black; padding: 5px; text-align: center;">  </div>	No	No
Presentation-Message	<div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>PLEASE HELP US SERVE YOU BETTER!!</p> </div>	No	No