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What are Forms?

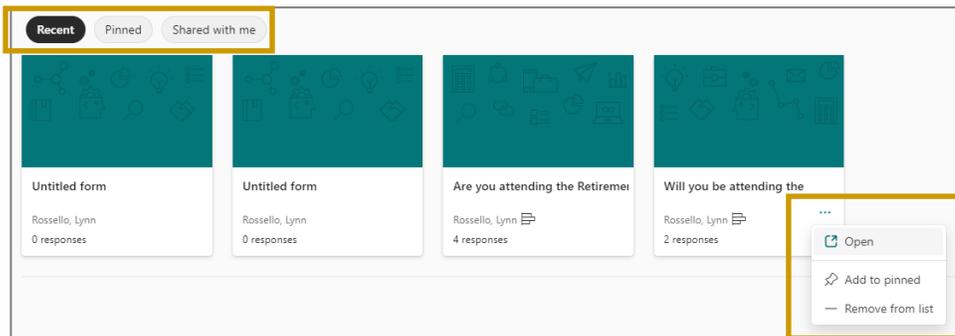
- ✓ Where you can create surveys, quizzes, and **polls**.
 - *****IMPORTANT*** Surveys** for RPI constituents need to abide by the **Survey Request Procedure** from the Institutional Research and Assessment department.
<https://provost.rpi.edu/institutional-research-and-assessment/student-survey-requests/survey-request-procedure>
- ✓ Invite others to respond to your form using any web browser or mobile device.
- ✓ Can easily see results as you receive responses.
- ✓ Forms sharing – After forms are created you can share them with others in your organization using a URL and external customers to collect data.
- ✓ Save time by copying forms from an existing one you created as a template.
- ✓ Export data to Excel.

Logging into Forms

1. Go to **portal.office.com**
2. Login with your **RPI email address** and **RCS password**.
3. From the left navigation bar, click the **Forms**  icon.

You will see any recently created forms at the top under the **Recent tab**. You can see any forms pinned within the **Pinned Tab** as well as forms shared to you under the **Shared with me tab**.

Each form has more options, **three dots . . .** located in the lower right corner, listing options to **Open**, **Add to pinned tab** or **Remove from the list**.



FAQ's

- **Who can use Microsoft Forms?**
 - Office 365 Education customers with an active RCS account.
- **Can someone without a Microsoft account answer the questions on my form?**
 - **Yes**, you will need to choose the setting to let people outside of the organization take the quiz, but you will need to create a place for them to fill in their name for you to see who responded.

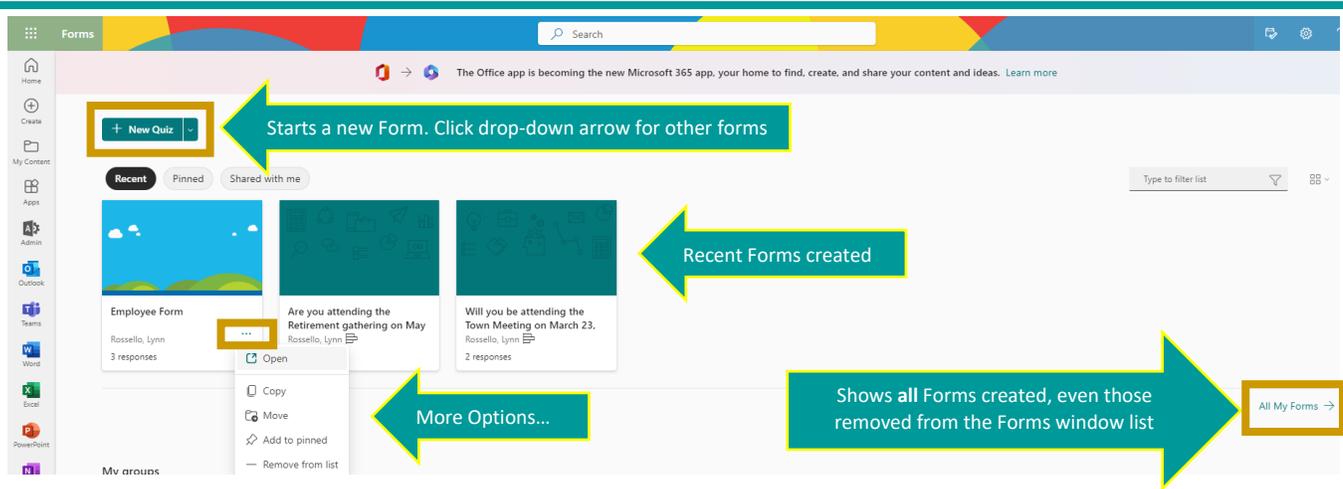
➤ Which platforms work with Microsoft Forms?

- MS Forms runs on Windows, Mac, Android, iOS and web platforms.

Reference: <https://support.microsoft.com/en-us/office/frequently-asked-questions-about-microsoft-forms-495c4242-6102-40a0-add8-df05ed6af61c>

Forms Window

After you create a few forms, they will appear on the Forms window. You can **copy, move**, Add to **pinned** tab or **Remove from the list**.



Create a Form

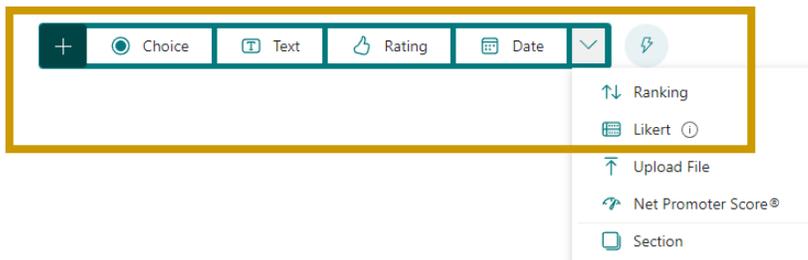


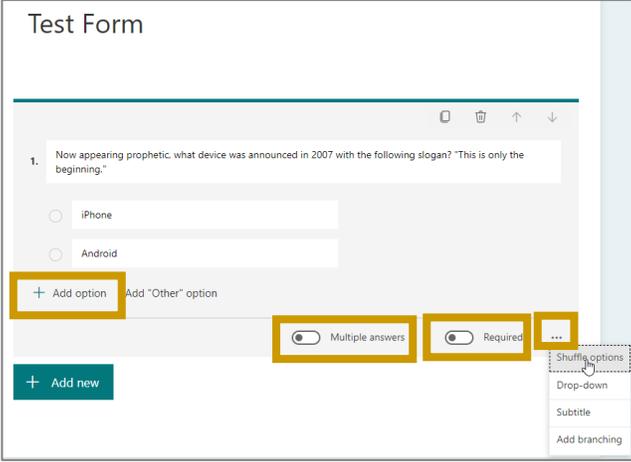
1. Click the **+New Form** or **+New Quiz** button
2. Click once on the **title** and type the name of the form. Add a **description** (optional)

Adding Content

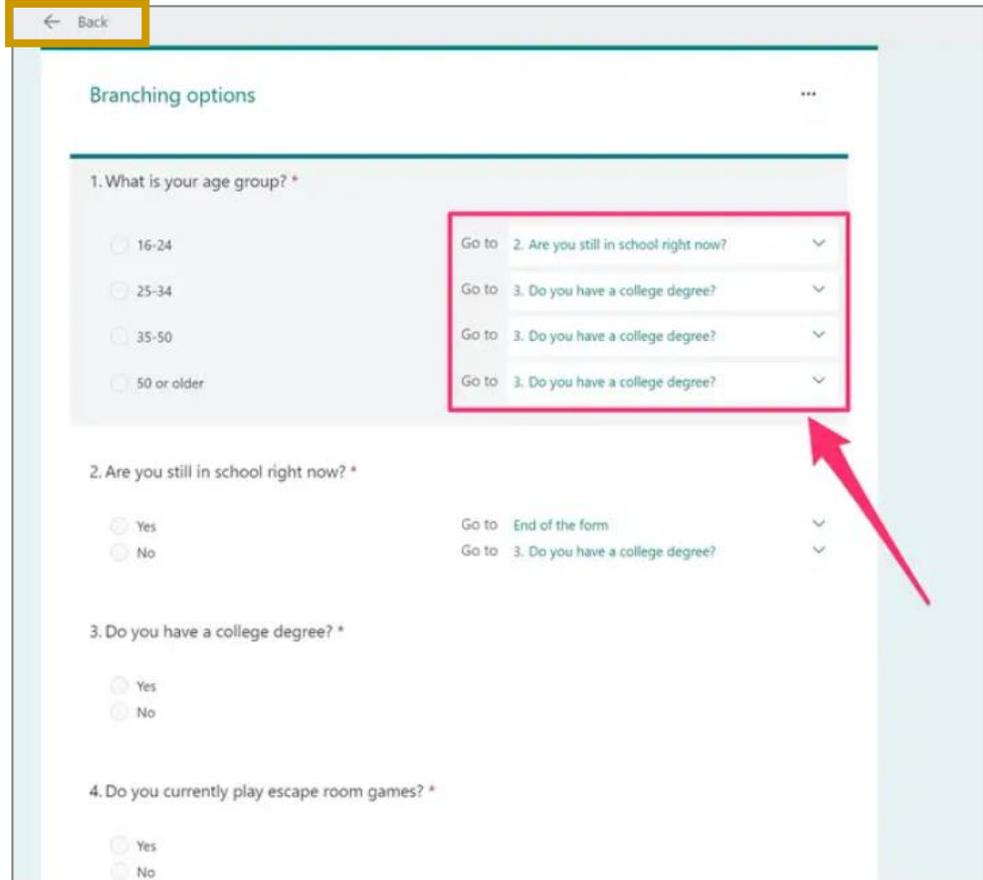
As you begin to create your content you will see several options from the content toolbar such as: **Choice, Text, Rating, Date, Ranking** and **Likert**.

A list of **options** appears to choose a question type.



Question Type	Description/Screenshot
<p>Choice Questions</p>	<p>Allow for multiple choice answers.</p> <ol style="list-style-type: none"> Click Add Option to add more answers to your question.  <ol style="list-style-type: none"> Located in the bottom right that you can turn on, is the Multiple Answers Button to allow for participants to select multiple answers, or the Required Button to make the question required in the submission. Click the three dots ... to view more options. <p>Once the question has been created, click outside the question box to view the question with the options or click Add new and the question bar appears below to add more questions.</p> <p>To Edit a question:</p> <ol style="list-style-type: none"> Click once on a question. <p>Edit the question and they click outside the question to view the changes.</p> <p>Add branching option</p> <p>Powerful feature of forms as this option can interactively change the questions a responder sees based on which answers they choose (used in multiple choice questions). Used to create interactive personalized experiences. Reference: scroll to "How to create a branching form" - https://www.businessinsider.com/guides/tech/microsoft-forms</p> <ol style="list-style-type: none"> While editing a multiple-choice question, click the three dots at the bottom right of the question and choose Add branching. On the Branching Options page, choose which question to go to for each of the choice selections. For example, the first option can take the user to the very next question, while the second option might skip that question and go directly to the following one.

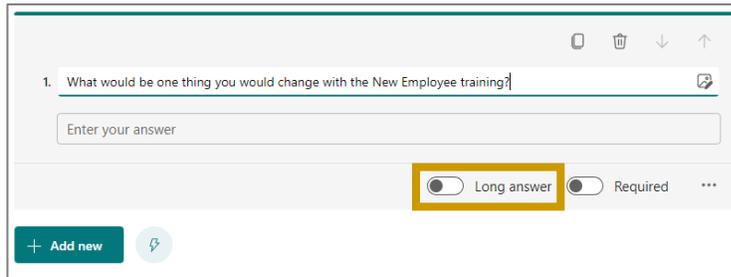
- 3. Continue selecting branching options for the other questions in the form. Certain questions might be a "dead end," for example, and go directly to the end of the form, while others proceed from question to question in an ordinary manner.
- 4. When you're complete with your branching options, click "Back" to go to the main form page.

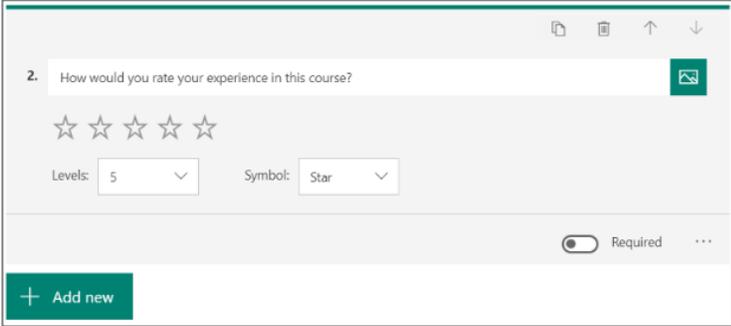
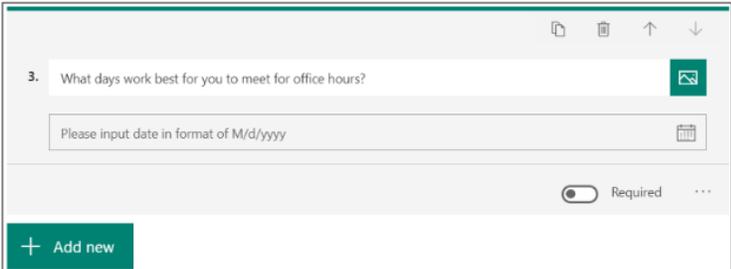
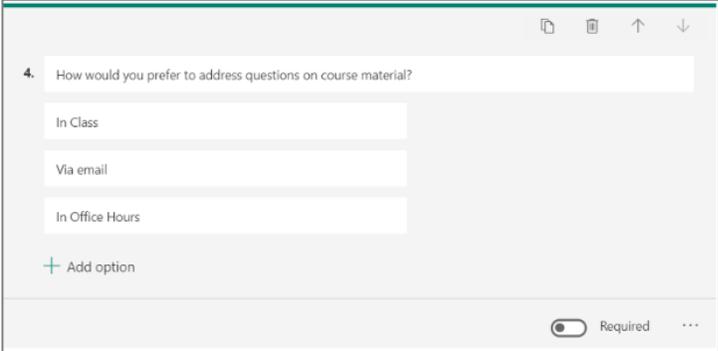
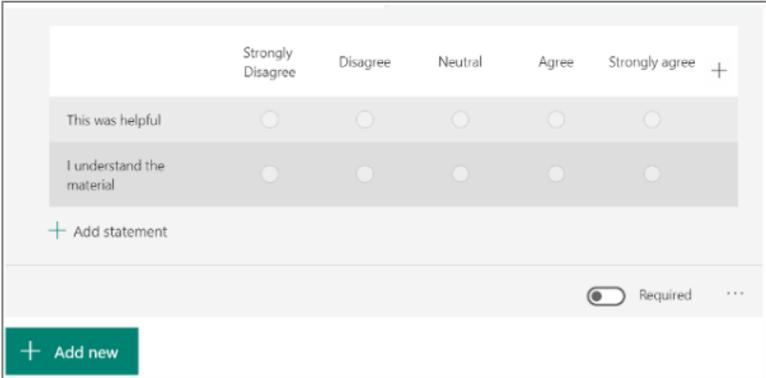


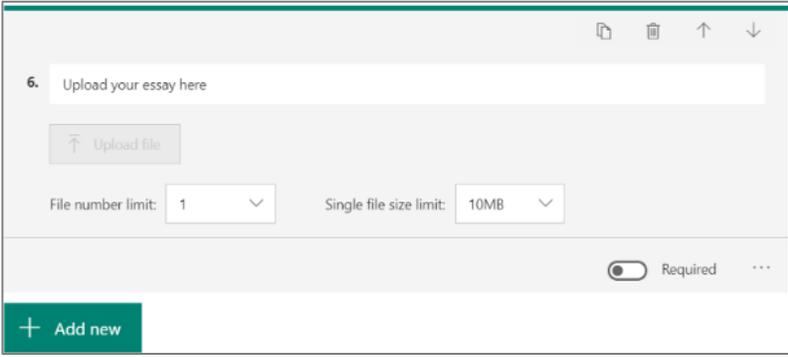
Set the “**path**” you want the responder to take based on their answers to the question.

Text Questions

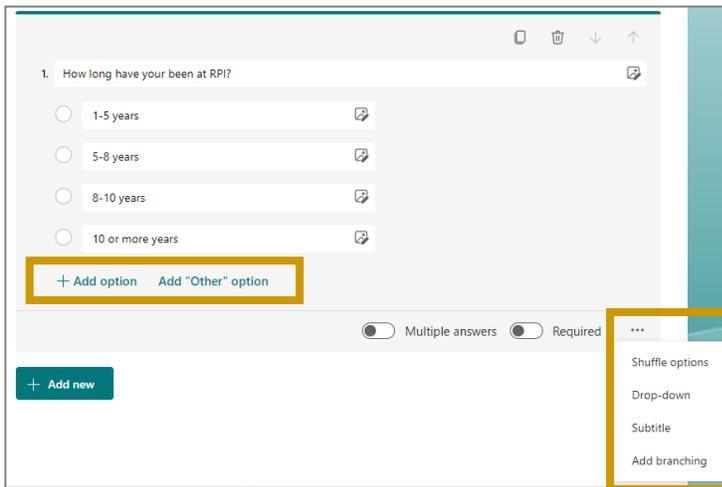
Used for short answer, however you can turn on Long Answer at the bottom right to allow for more than 4,000 words.



<p>Rating Questions</p>	<p>Allows participants to rate something by stars or numbers ranging from 2-10.</p> 
<p>Date Questions</p>	<p>Choose dates from a calendar. Good to survey for availability.</p> 
<p>Ranking Questions</p>	<p>Rank answers in order of their importance, chronological order, etc.</p> 
<p>Likert Questions</p>	<p>Used to engage attitudes or opinions on topics.</p> 

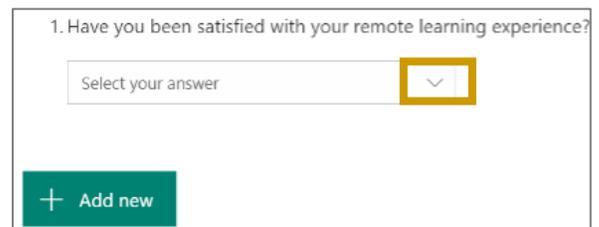
File Uploads	<p>Participants can upload files from their computer to the quiz.</p> 
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3. Select **+ Add option** or **Add “Other”** as an option.



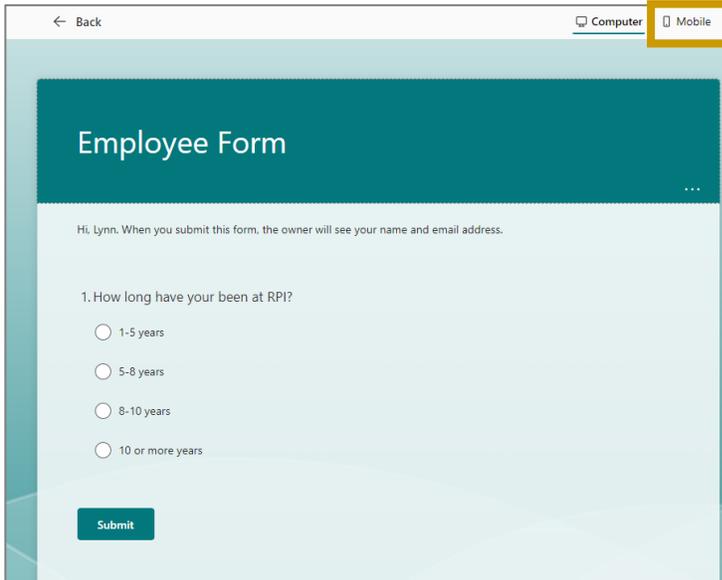
Under **... more options**:

- **Shuffle Options** - Randomizes the order of answers that your participants will be selecting.
- **Drop Down** - Insert answers into a drop-down list, which is great for questions with lots of answer options.



4. Click outside the question window and the full question with answers appears.

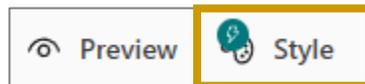
5. Select **Preview**  **Preview** located in the upper right of the Forms window and then choose **Mobile** to view the question on a mobile device.



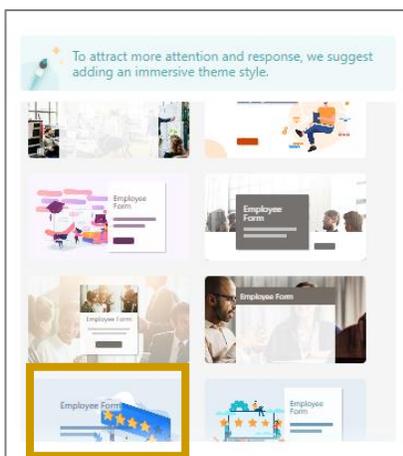
6. Click **Back**  **Back** located in the middle of the top bar to go back to add more questions.

Adding a Style

To attract more attention, a **Style** can be added to a form. The **Style** button is located in the upper right corner of the form windows to the right of the **Preview** button.

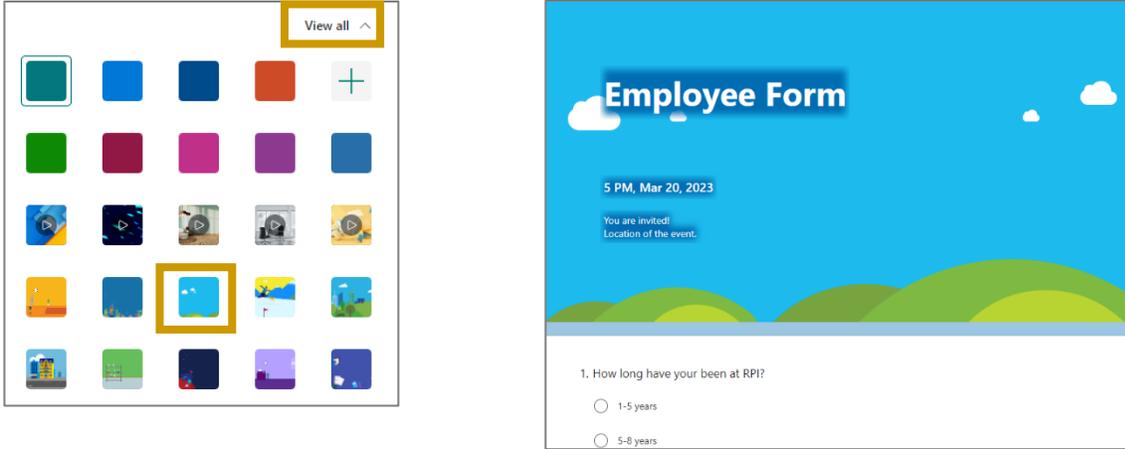


1. **Choose a specific Style** at the top portion and then choose **Preview** to see a start form page with date and time as well as a start now button.



OR use the lower portion of the style window and choose,

2. **View all** to view all the selections that include solid colors, to interactive backgrounds. These backgrounds have a start page with the same information as the style page.



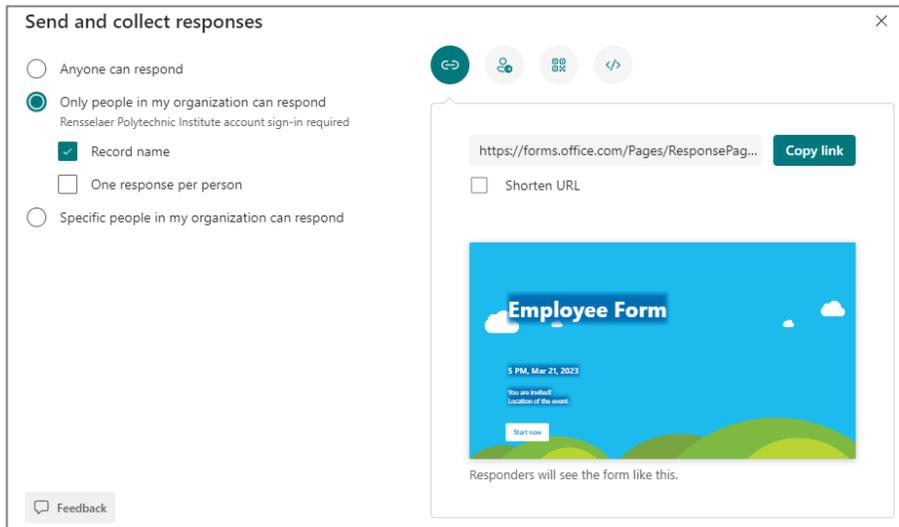
Share a Form

Choose who you want to respond to your form using the **Collect responses** button.

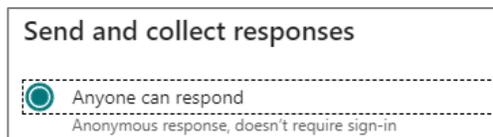
Reference: <https://support.microsoft.com/en-us/office/share-a-form-384371be-f1e7-4628-bcba-abd3d6123917>

1. Click the **Collect responses**  button located in the upper right corner of the form window.

The **Send and collect responses** opens with several ways to collect responses.



- **Anyone can respond** - Anyone inside or outside of your organization can submit responses to your form.



- **Only people in my organization can respond** - Only people within your organization, signed in with a work or school account, can submit responses to your form. You can choose to **Record name** and/or choose **One response per person**.

Send and collect responses

Anyone can respond

Only people in my organization can respond
Rensselaer Polytechnic Institute account sign-in required

Record name

One response per person

- **Specific people in my organization can respond** - Only people or groups in your organization that you specify can respond to your form. Click and **enter a name, group or email address**.

Specific people in my organization can respond
Rensselaer Polytechnic Institute account sign-in required

Record name

One response per person

Enter a name, group, or email address

- **To delete a name** from the group, click the three dots ... **More options** and then move your mouse over their name and choose the **trash** icon.

Send and collect responses

Anyone can respond

Only people in my organization can respond

Specific people in my organization can respond
Rensselaer Polytechnic Institute account sign-in required

Record name

One response per person

Add people

Enter a name, group, or email address

More options

← **Manage who can respond**

Delete Lewis, Matthew J

Lewis, Matthew J
lewism6@rpi.edu

Deur
deuts

2. Choose how you want to ask for responses.

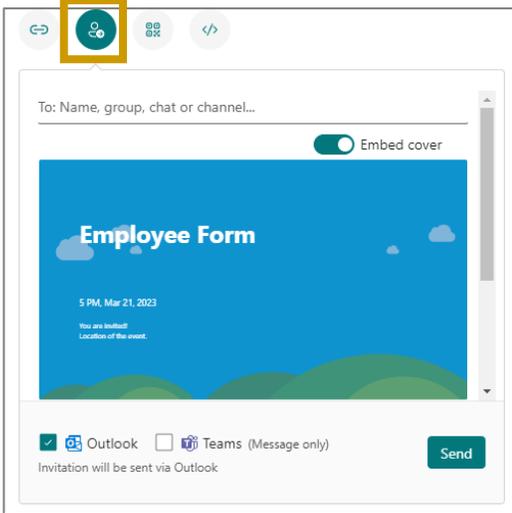
- Click the **Copy link**  icon, and then paste this unique link into an email, document, etc.

Copy link 

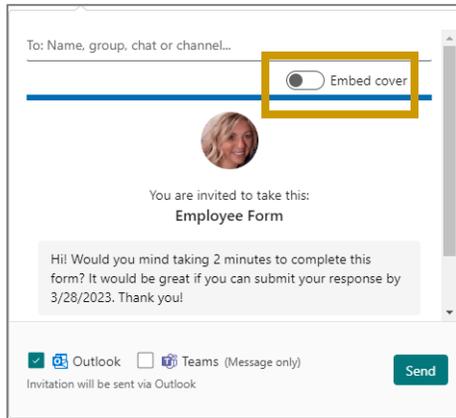
Shorten URL

<https://forms.office.com/Pages/ResponsePag...>

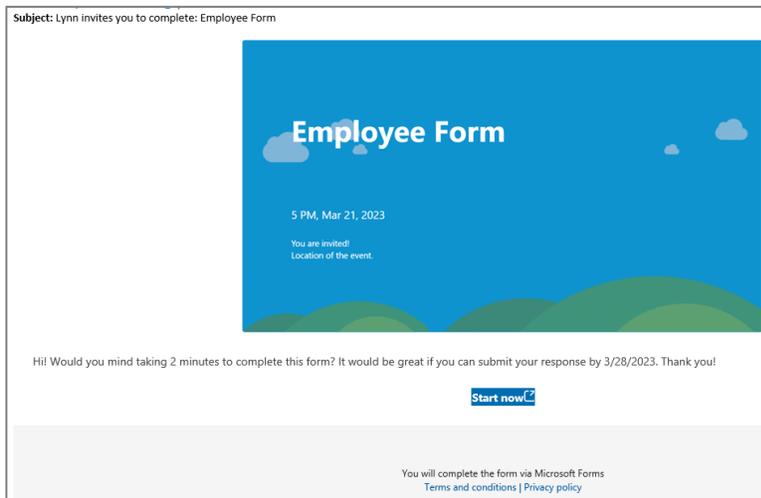
- Click the **Invitation**  icon and then **start typing a name, group, or channel** and a list appears below to choose from. Click **Send** Microsoft Forms includes a brief note in the email body with a **start now** button to your form.



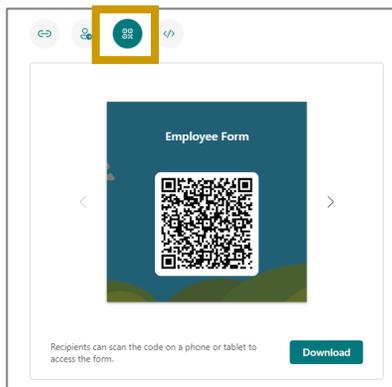
Slide “Embed cover” to left to remove the cover.



Example of the form email.



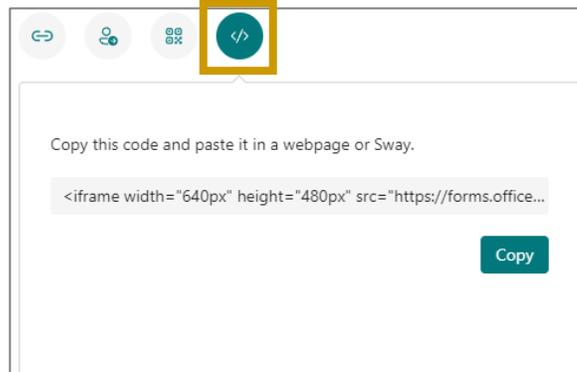
- Select the **QR code**  icon, and then click the **Download** button, which will download your QR code as a .png file.



- A **.png file** appears on the below file taskbar and you can include this file wherever your intended audience can scan it with a QR code scanner, such as a mobile device, to access your form.



- Select the **Embed**  icon and then click **Copy and Paste** this **embed code** into a web page, Sway, or a document.



View Responses

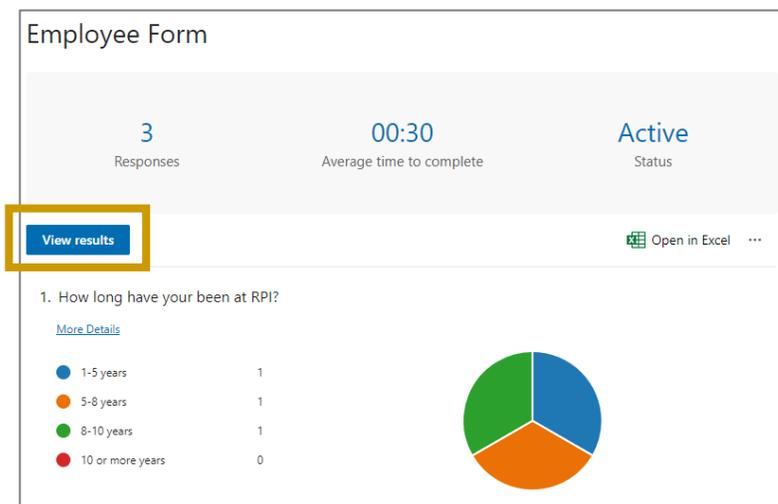
As you start to receive responses, that number appears on the top form bar.

1. Click **Responses** from the upper left corner of the forms window.



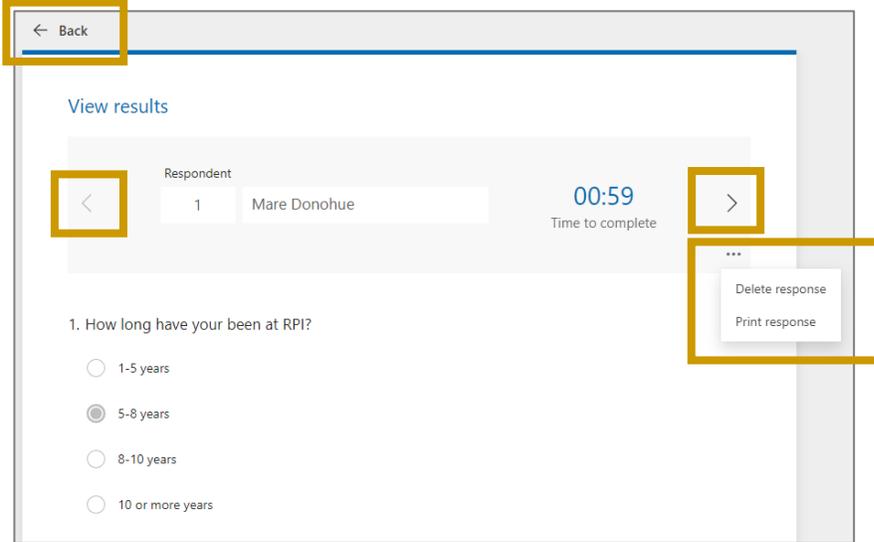
The Form Response screen appears.

2. Click **View results**.

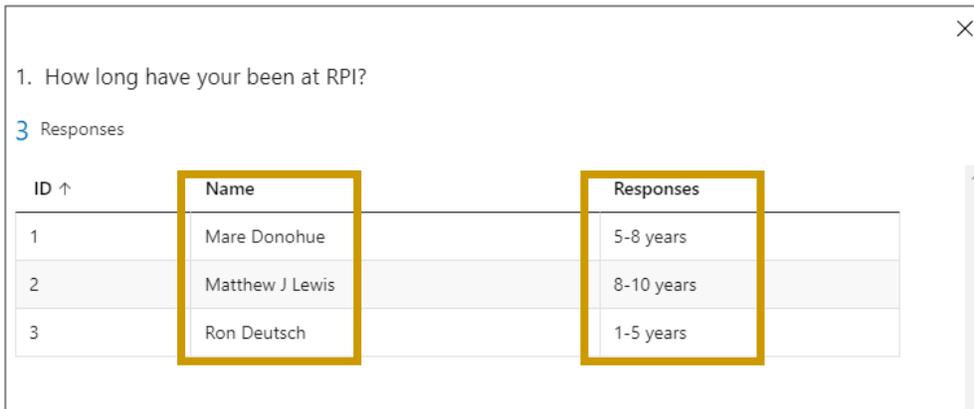
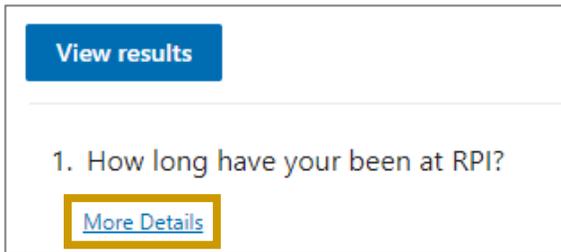


3. **View results** shows individual details for each responder, such as the time it took to complete the form and their answers. Click forward and backward arrows to go through details on each response. Click the three dots ... **more options** to print or delete the response.

4. Click the **Back** button  at the top to return to the Responses screen.



5. Click **More Details** link to see a list of names for each responder and their answers for each question.



The 'More Details' modal window displays a table of responses for the question '1. How long have your been at RPI?'. The table has three columns: 'ID', 'Name', and 'Responses'. There are 3 responses listed.

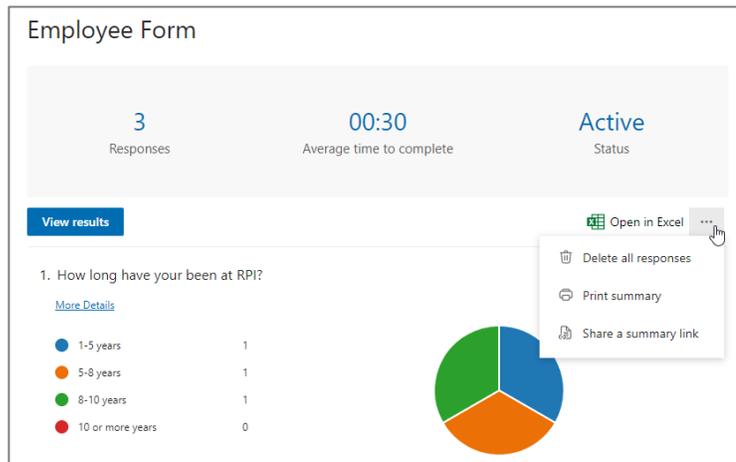
ID ↑	Name	Responses
1	Mare Donohue	5-8 years
2	Matthew J Lewis	8-10 years
3	Ron Deutsch	1-5 years

Print Responses

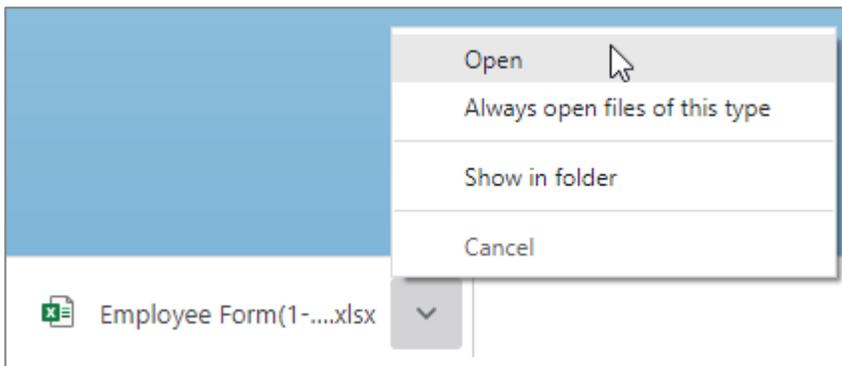
You can easily print individual names of the responders and their responses in Excel.

1. Click **Responses** from the upper left corner of the forms window.

The Responses windows opens. The responses can be opened in Excel, Deleted, Printed as a summary or create a Summary link to be shared.



2. Click **Open in Excel**  to the right of the View results button.
3. File appears below the window. Click **Open**.



Excel opens with a list showing Start time, Completion time, Email, full name and individuals responses.

	A	B	C	D	E	F
1	ID	Start time	Completion time	Email	Name	How long have you
2	1	3/21/23 9:55:23	3/21/23 9:56:22	donohm2@rpi.edu	Mare Donohue	5-8 years
3	2	3/21/23 11:26:02	3/21/23 11:26:29	lewism6@rpi.edu	Matthew J Lewis	8-10 years
4	3	3/21/23 11:26:28	3/21/23 11:26:34	deutsr@rpi.edu	Ron Deutsch	1-5 years
5						
6						

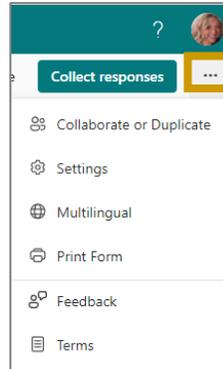
4. Click **File** → **Print** to make a copy of the list.

Forms Template Gallery

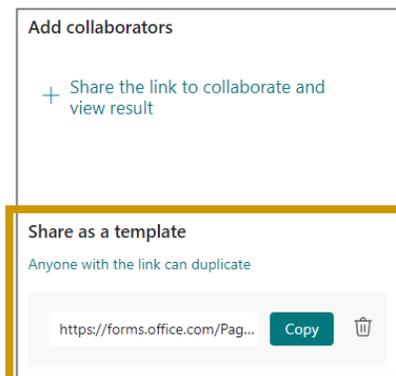
1. Go to <https://forms.microsoft.com/Pages/DesignPageV2.aspx?subpage=templatesall>
2. Click once on one of the templates and the template opens in your Forms window.
3. Make changes to the form.

Allow Others To Use Your Form

1. While in a form, click the **three dots** ... located in the upper right of the form window.
2. Choose **Collaborate or Duplicate**.



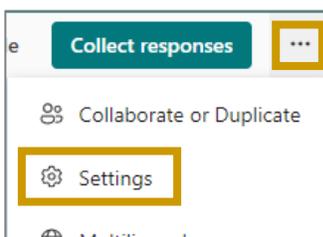
3. Under the Share as a template section, click **+Get a link to duplicate**.



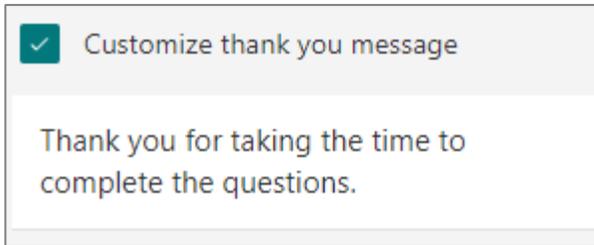
4. **Copy the generated link** and **share it with your participants**. They can still fill and submit the form, but now they can also duplicate it and use it as a template.

Adding a Thank You Message

1. While in a form, click the **three dots** ... located in the upper right of the form window.
2. Choose **Settings**.



3. Check the **Customize thank you message** box to select and then type your message.



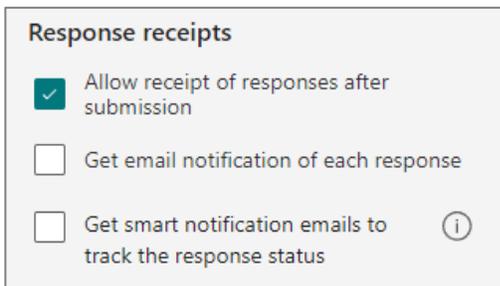
Customize thank you message

Thank you for taking the time to complete the questions.

Get an Email Notification for Each Response

An email can be sent each time someone completes a form. While you may not want to have so many emails sent to you each time someone is finished, it can help you track responses, especially if you have a smaller group of participants.

1. While in a form, click the **three dots** ... located in the upper right of the form window.
2. Choose **Settings**.
3. Check the **Allow receipt of responses after submission** box.



Response receipts

Allow receipt of responses after submission

Get email notification of each response

Get smart notification emails to track the response status ⓘ

References/Links

Percipio Training – Creating Forms in Microsoft Forms - <https://rpi.percipio.com/courses/e43e9340-e3c8-11e7-9c36-61a08b8ae4eb/videos/428566e0-e3c9-11e7-9c36-61a08b8ae4eb>

<https://support.microsoft.com/en-us/office/create-a-form-39a23830-452d-474c-ae1f-47a6ebefa21a>

<https://www.computerworld.com/article/3687048/microsoft-forms-cheat-sheet-create-online-surveys-quizzes-forms.html>

Forms Template Gallery

<https://forms.microsoft.com/Pages/DesignPageV2.aspx?subpage=templatesall>

Tips and Tricks on Forms

<https://www.makeuseof.com/microsoft-forms-tips-tricks/>