Forms & Surveys

Schoolwires[®] Centricity2™



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Overview

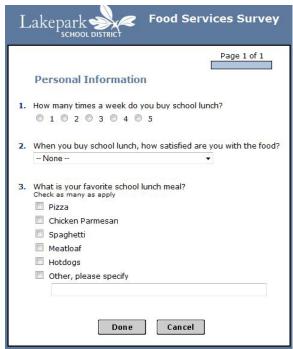
Use Forms & Surveys to create:

- 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:





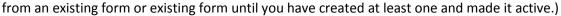
How do I ...?

Forms & Surveys

Create and manage forms and si

Creating a Form:

- 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 **New Form/Survey**.
- Enter a title for your new form or survey and choose whether to design a new form or copy



files and folders used in your workspace.

Editors & Viewers

Statistics

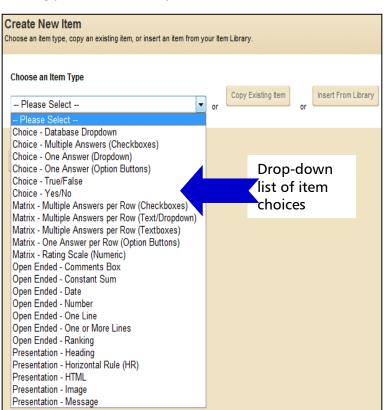
Tools

and apps. ?

ders



- Choose Insert 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 Save. Your form will now display the first item entered.



- 7) Continue entering new items by using either of the following methods:
 - a. Click **Insert** beside an item you already created. If you choose this method, you will be inserting an item above the current item.
 - b. Click **Insert** 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 **Edit** to the right of the question. Notice that you can also copy an item by clicking **Copy** under the **More** drop-down menu. (See Figure 1.)
- 9) Move items on a form or survey in one of two ways:
 - a. After clicking **More**, click **Move** next to the item. (See Figure 1.) This method allows you to move the item anywhere in the form or survey.
 - b. 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:
 - a. Click New Page at the bottom of the page on which you are working. (See Figure 1.)
 - b. Click More next to an item to insert a page Break above that item. (See Figure 1.)
- 11) After clicking **More**, click **Pipe** 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 end-users 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###</pr>
```

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 **Edit Properties**. 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 **Insert Conditions**. 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 **View** 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 **Options** next to the form or survey you are working on in the *Forms & Surveys* window.



 Click on the tab headings listed below in order to adjust those 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. You can create additional styles in the Site and 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 additional 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**—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

You have four options for making your form available for completion.

- 1) Once you have activated the form, you can insert a link to that form in an app that contains the *Editor* on a page by choosing this icon in the **Editor**.
- 2) You can insert a link to a form (on a page or as a Site Shortcut) 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.

- 3) You can embed the form as part of your app on a page.
 - a. Copy the URL of the form—Do this by clicking **View** on the form and copying the URL from the address bar.
 - b. Click on the **Summary** tab to return to the list of current pages.
 - c. Open the page and the *Editor* app in which you wish to embed the form.
 - d. Click on the Toolbox icon () located in the 3rd row of editor icons.
 - e. Click on "Embed Complex Content." (Items are listed alphabetically.)
 - f. Insert the URL for the form in the box provided, be sure to remove the extra http:// at the beginning of the form since this is added automatically by the system.
 - g. Click Insert.
 - i. To change the size of the embedded form, select it like you would a picture and then click and drag to re-size.
 - ii. Another method is to select the form, drag it like a picture to stretch the size a little, and then click view HTML and change the width and height by increasing the numbers listed.
- 4) You can map a page to your form. Please note that you will want to map the form to a page that does not have content on it. If you try to map to a page that has content on it that content will not display since the form will open when the person clicks on the page name.
 - a. Copy the URL of the form. Do this by clicking **View** on the form and copying the URL from the address bar.
 - b. Click on the **Summary** tab to return to the list of current pages.
 - c. Click the **Actions** drop-down list to the right of the page to which you wish to map the form. (You may need to create a new page.)
 - d. Select **Set Options**.
 - e. Paste the URL into the Map Page to Web Address field. Add "target=_blank" to the end of the URL to have the form open in a new window.
 - f. Click Save.

Accessing and Reviewing Your Data:

First Method:

- 1) Click on the **Reports** tab in the *Forms & Surveys* window.
- Select the desired form or survey from the drop-down list.
- 3) View individual responses by clicking on **Individual**



Responses. You can also access an individual response by clicking **View** next to the response record.

- 4) View the overall results by clicking on **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 More to Manage Filters and Share Results.
 - Click on Insert Filter 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 **Export Data**. 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, user data or both. The
 Username will display when
 exported regardless of whether you
 check the box or not.
- c. Click on **Export Data** at the bottom of the window. You will be prompted to save or open the results file.

Export Format Export Data to Excel (CSV) Export data to CSV (Excel. Export data to XML. This format is commonly us Data Format User Responses Export each user's response at Show [No Answer Entered] instead of blan Individual Responses Export each answer as at SPSS Format Extended Export each response at SPSS Format Condensed Condensed single option Note: The question "alias" (if one is assigned) will

desired in admin tools using "database validation"

Second Method:

Click on the **More** drop-down list 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 New Style.
- Name your new style. Choose to create an entirely new style or copy an existing style.
- 4) Click Save.
- 5) To edit a Style, click on the Style Name.
 - a. General Information
 - Select Yes from the Public Use drop-down list 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.





- 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 so editors can 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 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 Save.



4) To edit a 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, you must put the piped answer on a subsequent page.
- ❖ You must change the status of form to *Active* to allow data to be entered and recorded.
- ❖ You may not make extensive edits to a form without first clearing responses. If you need to retain the data, export it before you edit the form.

Table 1: Form Types and Examples

Item Type	Example or Requirements	Random Answers?	Point Values?
Database Drop-down	Here are the requirements: 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."	No	No
Choice- Multiple Answers (Checkboxes)	Which of these are components of a form or survey? Check as many as apply. Status Design Style Pages Items	Yes	Yes
Choice-One Answer (Drop-Down)	Which would you prefer to do? None None Take tickets Serve refreshments Help backstage Help front of house	Yes	Yes

Item Type	Example or Requirements					Random Answers?	Point Values?	
Choice-One	Let us know when you are available to help.					Yes	Yes	
Answer				re available	to meip.			
(Option		© 9 a.m. to 11 a.m.						
Buttons)		11 a.m. to 1						
	© 1	l p.m. to 3 p	.m.					
	© 3	3 p.m. to 5 p	.m.					
Choice- True/False	You can have more than one form or survey associated with a style. True False					No	No	
Choice- Yes/No		uld you favo Yes © No	or an all-	day kinderg	arten?		No	No
Matrix-	You can answer as m	anv times as vou w	ish.				Yes	No
Multiple	Check as many as apply			Answer 2		Answer 3		
Answers per	Question 1	Allswe		Allswei 2		Allswei		
Row	Question 2							
(Checkboxes)								
Matrix-	Please enter your Em	ergency Contact in	formation.				Yes	No
Multiple			Relationship		Contact	Number		
Answers per	Contact One:	Contact One:Please Select- ▼						
Row (Text /	Contact Two:	PI	ease Select ▼					
Dropdown)	Contact Three (if applicable):	Pl	ease Select ▼					
Matrix-	List the names of all household members.					Yes	No	
Multiple	Include anyone currently	living in the house. Last Nar	ne	First Name		Relationship		
Answers per	Member One:							
Row	Member Two:							
(Textboxes)	Member Three:							
	Member Four:							
Matrix-One Answer per	Rate your subjects. You can only choose one	rating for each subjec	t.				Yes	No
•		Very Easy	Easy	Neutral	Difficult	Very Dif		
Row (Option	Math English	© ©	© ©	© ©	© ©	0		
Buttons)	Science	©	0	0	0	0		
	Phsyical Ed	0	0	0	0	0		
Matrix-	Rate these after scho	ol activities					Yes	No
Rating Scale	Use 1 if you seldom part	icipate and 5 if you pa						
(Numeric)	Sports	1	2	3 ©	4	5		
/	Clubs	0	0	0	0	0		
	Volunteering	0	0	0	0	0		
	Lessons	©	0	6	0	0		

Item Type	Example or Requirements	Random Answers?	Point Values?
Open Ended- Comments Box	Please tell us what you think.	No	No
Open Ended- Constant Sum	Please enter your page totals. The sum of the numbers entered must equal 100. Page One Page Two Page Three	Yes	No
Open Ended- Date	Enter your birthday. mm/dd/yyyy	No	No
Open Ended- Number	What follows 999?	No	No
Open Ended- One Line	First Name Please enter your first name.	No	No
Open Ended- One or More Lines	Tell us: Street Address: City: State:	Yes	No
Open Ended- Ranking	How would you rank the food in the cafeteria against the other two schools? Rank the items below, using numeric values starting with 1. HS MS EL	Yes	No
Presentation -Heading	THIS IS A PRESENTATION HEADING	No	No
Presentation -Horizontal Rule (HR)		No	No
Presentation -HTML	Code Use this field to enter any HTML and/or content. Text will be displayed using the HTML tags you enter. 	No	No
Presentation -Image		No	No
Presentation -Message	PLEASE HELP US SERVE YOU BETTER!!	No	No