Office 365 Forms
# Table of Contents

- **WHAT IS OFFICE 365 FORMS**........................................................................................................................................... 3  
  Objectives........................................................................................................................................................................ 3  
- **OFFICE 365 FORMS VS. GOOGLE FORMS**.................................................................................................................. 3  
- **SIGNING IN** .................................................................................................................................................................... 4  
- **THE OFFICE 365 INTERFACE** .......................................................................................................................................... 5  
- **FORMS APP & CREATION OF NEW FORM** .................................................................................................................. 5  
- **FORMS QUESTION TYPES** ............................................................................................................................................. 7  
- **FORMS QUESTION EXAMPLES** ........................................................................................................................................ 7  
  - Choice .................................................................................................................................................................................. 7  
  - Text ..................................................................................................................................................................................... 9  
  - Rating .................................................................................................................................................................................. 10  
  - Date ................................................................................................................................................................................... 10  
  - Ranking ............................................................................................................................................................................... 11  
  - Likert .................................................................................................................................................................................. 11  
  - Net Promoter Score ............................................................................................................................................................ 12  
  - Sections ............................................................................................................................................................................. 12  
- **SHARING A FORMS DOCUMENT** ...................................................................................................................................... 14  
- **ANALYZING DATA RESPONSES FOR FORMS** ................................................................................................................ 15  
  - Analyzing Data in Excel ...................................................................................................................................................... 16  
- **ENHANCING FORMS AND QUIZZES** ............................................................................................................................. 17  
  - Applying a Theme ............................................................................................................................................................... 17  
  - Branching .......................................................................................................................................................................... 18  
  - Inserting Images and Media.................................................................................................................................................. 19  
- **OFFICE 365 FORMS ICONS GUIDE** ................................................................................................................................... ERROR! BOOKMARK NOT DEFINED.
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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.

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

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)
**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](image)

**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](image)

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)

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)

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](image)

**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](image)

**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](image)

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](image)

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](image)  ![Figure 13 Office 365 Forms Subtitles & Shuffle options](image)
When using the “**Multiple answers**” option the radio selection buttons for the answers field will change to check boxes, as seen below *(Figure 14)*

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”, and each have the option of adding aSubtitle 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)*.
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)

![Figure 16 – Office 365 Forms Rating question type](image)

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)

![Figure 17 – Office 365 Forms Date question type](image)
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)

![Figure 18 - Office 365 Forms Ranking question type](image)

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)

![Figure 19 - Office 365 Likert question type](image)
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)

![Figure 20 - Office 365 Net Promoter Score question type](image)

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](image)

*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)
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](image-url)
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 count icon. Each form can receive a maximum of 5000 responses. There is a Review answers button, a Post scores button, 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.
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](image)

**Figure 27 - Office 365 Forms Response**

![Figure 28 - Forms: Response More Details](image)

**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 the total points earned, feedback and answers selected for each question. (See Figure 30)

![Figure 29 - Forms Analyzing Data in Excel](image)

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

![Figure 30 - Forms: Response Data in Excel](image)

**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 allow 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](image)

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](image)
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](image)

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 perform for each answer option for the question. The answer will determine the function of the branch.

![Figure 34 - Office 365 Forms Branching question](image)

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.
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)

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

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

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)

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