

# MS Forms Tutorial

## Introduction

The Campus is moving away from FormStack and adapting MS Forms as a new forms platform.

## Guidelines of moving From FormStack

Please review your forms and please make sure to follow the bellow guidelines:

1. If your form has any level 1 data, please **DO NOT USE MS Forms**, you will need to use OnBase for the form, you can contact Jason Bokai. If you need any further information about what is level 1 Data please refer to the following link <https://www.cpp.edu/it/policies-procedures-guidelines/documents/cpp-data-classification-handling-standard-working-draft-final-20190627.pdf>
2. If your form does require E-signature, please **DO NOT USE MS Forms**, you will need to use Adobe sign for that form, unless you can replace the signature with an acknowledge box then you can proceed with MS Forms.

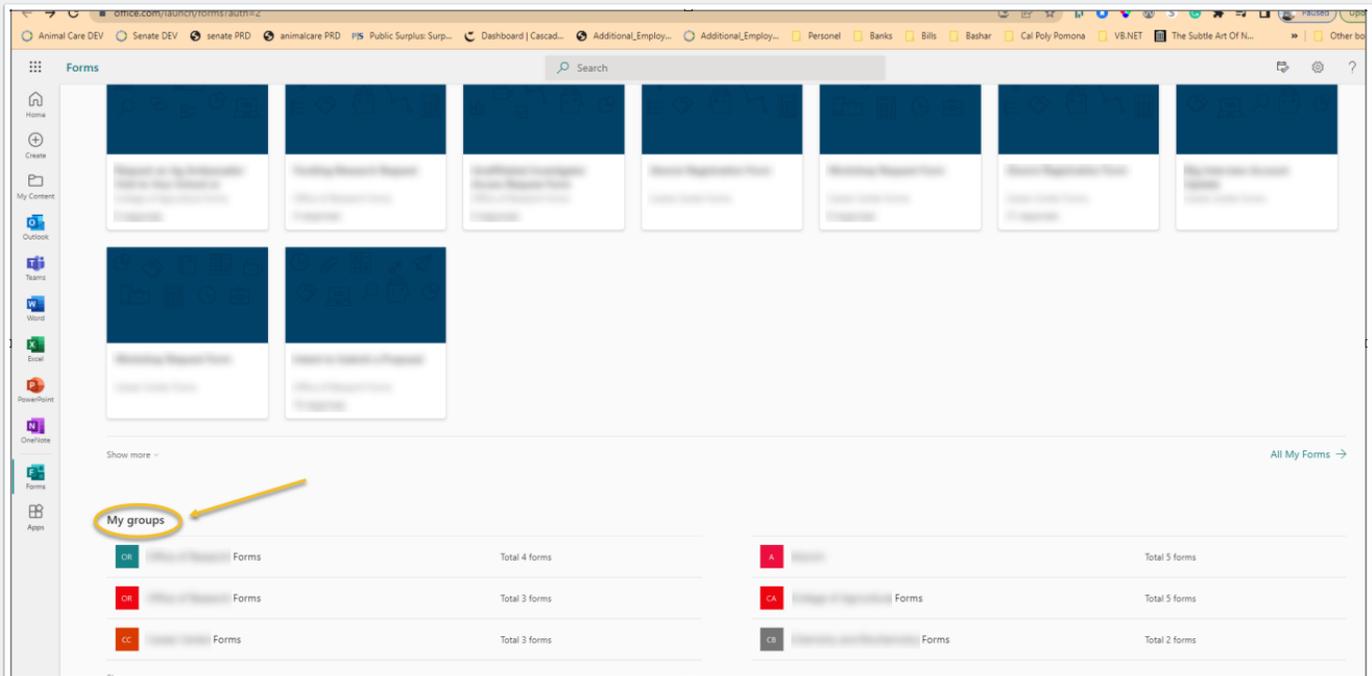
## Steps of creating a new form in MS Forms

Please make sure that you are following these steps hence they are very crucial, once you log in to MS Form you have to be aware that you will be using your CPP credintials and this will lead you to view your personal office 365 space, you will have to be sure that you are selecting the appropriate group account that you are creating the form for, otherwise the form and its all consecutive submissions will be stored in your personal office 365 space.

# MS Forms Tutorial

## 1. Log in to MS Forms

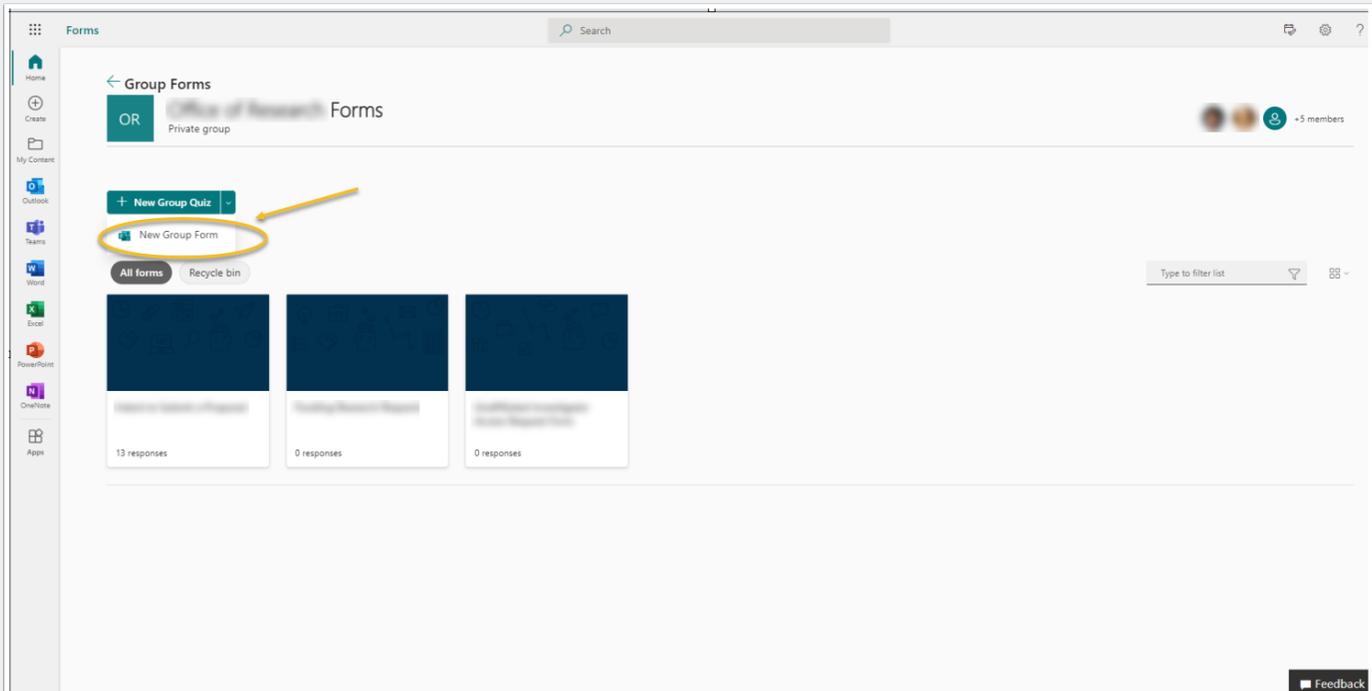
- Logging to MS forms using the following link <https://www.office.com/>
- on the dash board please scroll down to the bottom of the page until you see **My groups**
- Make sure to select the appropriate group that you want to create a form for.



# MS Forms Tutorial

## Creating a new form

- once you are on the group form dashboard, select New Group Form from the dropdown menu

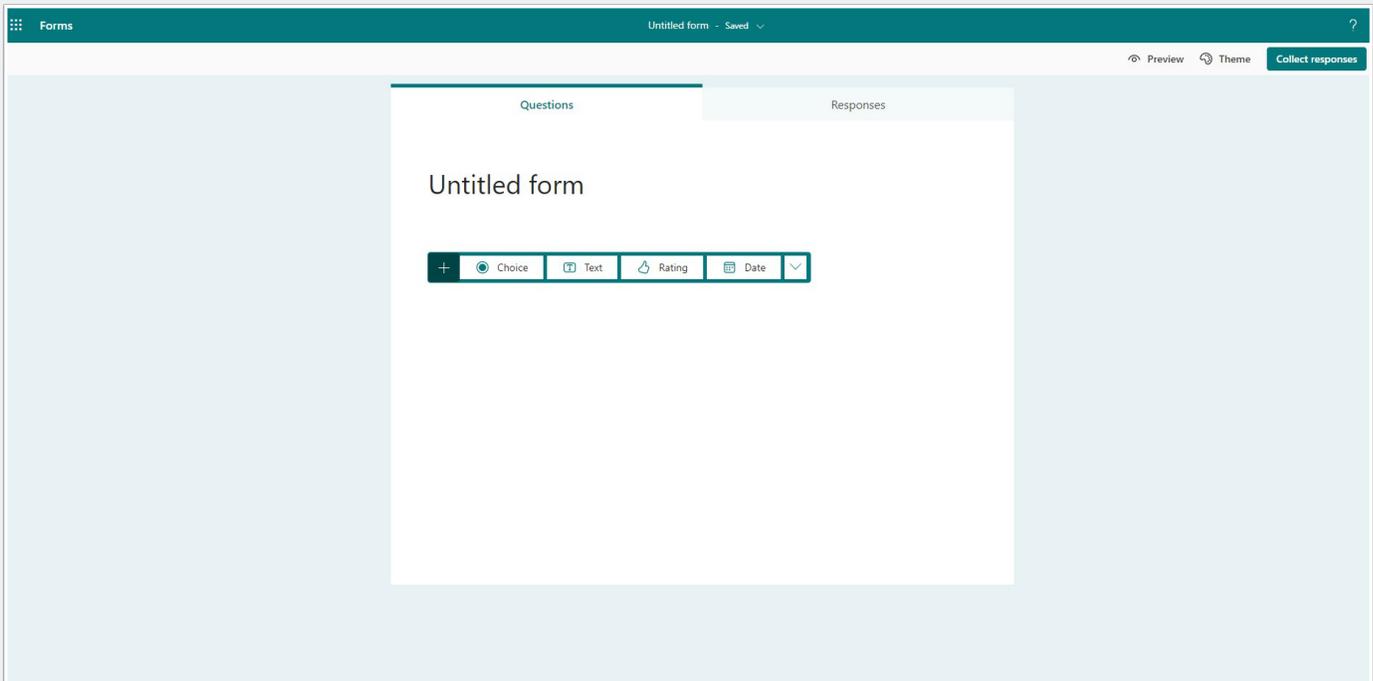


## 3. Add questions

1. Select **Add new** to add a new question to your form.
2. Choose what kind of question you want to add, such as **Choice**, **Text**, **Rating**, or **Date** question types. Select **More question types** for **Ranking**, **Likert**, **File upload**, or **Net Promoter Score®** question types. To organize sections for your questions, select **Section**.
1. **Tip:** You can also format your text. Highlight a word or words in your title or questions, and then choose any of the following: **Bold** (keyboard shortcut - CTRL/Cmd+B), **Italic** (keyboard shortcut - CTRL/Cmd+I), **Underline** (keyboard shortcut - CTRL/Cmd+U), **Font color**, **Font size**, **Numbering**, or **Bullets**.

# MS Forms Tutorial

2. **Important:** If you delete a question, it will be permanently deleted along with any response data that's been collected for it. [Learn more](#).



## 4. Add branching logic to your form

Before you get started, it's a good idea to make sure all of your questions are created. When you're ready to add branching, follow these steps:

1. Go to the question for which you want to add branching. Select **More settings for question**, and then choose **Add branching**. **Note:** If you [add sections to your form](#), you can also add branching to a section. On the section you want to branch, select **More settings for section**, and then choose **Add branching**.
2. On the **Branching options** page, select the drop-down list next to the question you want to branch.
3. Select the question that you want to branch to. In this example, if a respondent answers **Yes** to question #5, you would direct them to go on to the next question (#6). However, if the respondent answers **No** to the question #5, you would have them branch, or skip, to question #7 **Notes:** You can only branch to a consecutive

# MS Forms Tutorial

question and not a preceding one. For example, if you have seven questions in your form and want to add branching to question 4, it can only branch to questions 5, 6, 7, or end of form. In the same example, question 5 can only branch to questions 6, 7, or end of form. If you try to branch to a preceding question, such as question 4 branching to question 2, it will break the experience for your respondent by skipping questions 5 through 7 and taking them directly to the end of the form with the **Submit** button. To prevent this, only branch to a consecutive question.

4. To insert additional branches to your survey or quiz, repeat steps 2 and 3. If you want a particular question assigned as the final one in the survey or quiz, select the drop-down list next to that question, and then select **End of the form**.
5. If you want to completely reset your form and remove branching, select **More options** , and then choose **Reset**.

5. Do you enjoy team events?

Yes

No

Go to **Next** ▼

Go to **7. How can we improve team events?** ▼

6. What do you like about team events?

Enter your answer

7. How can we improve team events?

Enter your answer

## 5. Preview your form

1. On a computer, select **Preview** to see how your form will look. On a mobile device select **Preview** to see how your form will look.
2. To test out your form, answer the questions in **Preview** mode, and then select **Submit**.
3. To keep editing your form, select **Back**.

# MS Forms Tutorial

← Back Computer Mobile

## Test Form

This form is for tutorial purposes ...

Hi, Lina. When you submit this form, the owner will see your name and email address.

1. First Question

Enter your answer

2. Second Question

First Option

Second Option

Submit

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

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## 5. Share forms with other/ embed form to cascade page

### Choose who you want to respond to your form

In the **Share** pane under **Send and collect responses**, select the drop-down list and choose from whom you want to collect responses.

- **Anyone can respond** - Anyone inside or outside of your organization can submit responses to your form or quiz.
- **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 or quiz.
- **Specific people in my organization can respond** - Only people or groups in your organization that you specify can respond to your form.

Copy the the link that is shown in the box, once the link is copied you can start to share that link in **cascade**:

- Open cascade and choose the site that you want to share the form in.
- Create a content page and choose Microsoft Form for the content type.
- In the "URL for your form" paste the URL from MS Form.
- Publish the content page and the form is ready to accept submissions.

# MS Forms Tutorial

Content Metadata Configure Fullscreen Draft saved Close Preview Draft ⋮

## Content

**Content Area Name**  
*Add a description for easy reference when editing pages in cascade.*

**Content Type \***  
*Choose from various content types for each section of your webpage.*

Microsoft Form

**Hide Content (will not show on publish)**  
*This allows you to prepare content ahead of time without having to publish it.*

Yes

### Microsoft Form

**URL for your form \***  
*https://forms.office.com/Pages/example*

**External Module Path (from another site)**  
*i.e. /marketplace/module.shtml*

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# MS Forms Tutorial

## 6. Preview form results and Export results

After you create your form, adjust its settings, and share your form with others, it's time to view the results. Open the form for which you want to review the results, and then select the **Responses** tab.

1. Select **View results** to see individual details for each responder, such as time it took to complete your form and the option(s) selected.
2. To easily view all of the response data for your form in an Excel workbook, select **Open in Excel**.
3. Select the **More Details** link to see the name of each responder and their answers for each question.

