Forms & Surveys

Blackboard Web Community Manager

Blackboard

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This guide covers all available features and functionality. Features included in your contract may vary.

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Introduction

Blackboard Web Community Manager Forms & Surveys is used to create and manage forms and surveys in your website. Each Site, Subsite, Channel and Section Workspace has one Forms & Surveys Workspace.

You can create faculty and course evaluations, school safety surveys, community surveys, registration forms, and self-grading online quizzes and exams using Forms & Surveys.

orms & Surv	eys forms and surveys f	or your site.							
Forms & Surveys	Item Libraries	Styles	Reports						
New Form/Survey	Import Form/S	urvey							
TATUS TITLE						RESPON	SES ACTIONS	5	
AGTIVE COUR	se Evaluation					RE SPON	SES ACTIONS	Options	More w
TATUS TITLE Cour Cour Conve Foot	se Evaluation ball Registration F	Form				RE SPON 0 1	SES ACTIONS	Options Options	More V

For more on Forms & Surveys, read Forms & Surveys Item Types and Forms & Surveys Styles.

Access Forms & Surveys

The Forms & Surveys Workspace is where you create and manage forms and surveys. Each Site, Subsite, Channel and Section Workspace has a Forms & Surveys Workspace. You can access Forms & Surveys two different ways, through the **Tools** tab and by clicking *Forms & Surveys* in **Common Tools**.

Access the Site Workspace Forms & Surveys

Here's how you access the Site Workspace Forms & Surveys from the **Tools** tab.

- 1. In *Site* Manager, navigate to the Site Workspace.
- 2. Click the **Tools** tab. A menu of tools displays.

A	Summary Mobile Site Tools Directors & Vic	ewers	Channels Statistics How do I?
Tools Manage y	our site tools and apps.		
	Files & Folders Organize the files and folders used in your workspace.		On-Screen Alerts Add or edit On-Screen Alerts for your site.
0	Friendly Web Address Mappings Create and edit Friendly Web Address Mappings for your site		Broadcast E-Alerts Add or Edit Broadcast E-Alerts for your site.
	Forms & Surveys Create and manage forms and surveys for your site.	1	Section Robot Import sections with pre-defined section configurations
9	Approve Visitor Comments Approve or reject visitor comments on your apps.	<u>(5)</u>	Approve Community Editing Approve or reject community edits to your apps.
*	App Manager Manage and edit the apps in your workspace.		Reports View your site's reports.
	Photo Gallery Create and manage photo galleries for your site.		Minibase Create and manage minibases for your site.

- 3. Click Forms & Surveys. The Forms & Surveys window displays.
- 4. Manage forms and surveys as desired.

You can also click Forms & Surveys under the **Common Tools** dashboard on the **Summary** tab in the Site Workspace.



Access the Subsite Workspace Forms & Surveys

Here's how you access the Subsite Workspace Forms & Surveys from the Tools tab.

- 1. In *Site* Manager, navigate to the appropriate Subsite Workspace.
- 2. Click the **Tools** tab. A menu of tools displays.



- 3. Click Forms & Surveys. The Forms & Surveys window displays.
- 4. Manage forms and surveys as desired.

You can also click Forms & Surveys under the **Common Tools** dashboard on the **Summary** tab in the Subsite Workspace.



Access the Channel Workspace Forms & Surveys

Here's how you access the Channel Workspace Forms & Surveys from the **Tools** tab.

- 1. In *Site* Manager, navigate to the appropriate Channel Workspace.
- 2. Click the **Tools** tab. A menu of tools displays.



- 3. Click Forms & Surveys. The Forms & Surveys window displays.
- 4. Manage forms and surveys as desired.

Access the Section Workspace Forms & Surveys

Here's how you access the Section Workspace Forms & Surveys from the Tools tab.

- 1. In *Site* Manager, navigate to the appropriate Section Workspace.
- 2. Click the **Tools** tab. A menu of tools displays.



- 3. Click Forms & Surveys. The Forms & Surveys window displays.
- 4. Manage forms and surveys as desired.

You can also click Forms & Surveys under the **Common Tools** dashboard on the **Summary** tab in the Section Workspace.



Create a Form or Survey

You can create a form or survey from scratch, or import or copy a form or survey that was previously created.

Create a New Form or Survey from Scratch

Here's how you create a new form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.

	Summary Mobile Site Tools Directors & View	ers	Channels Statistics How do I?
Tools Manage y	our site tools and apps.		
	Files & Folders Organize the files and folders used in your workspace.	•	On-Screen Alerts Add or edit On-Screen Alerts for your site.
0	Friendly Web Address Mappings Create and edit Friendly Web Address Mappings for your site		Broadcast E-Alerts Add or Edit Broadcast E-Alerts for your site.
	Forms & Surveys Create and manage forms and surveys for your site.	1	Section Robot Import sections with pre-defined section configurations.
9	Approve Visitor Comments Approve or reject visitor comments on your apps.	6	Approve Community Editing Approve or reject community edits to your apps.
4	App Manager Manage and edit the apps in your workspace.		Reports View your site's reports.
	Photo Gallery Create and manage photo galleries for your site.		Minibase Create and manage minibases for your site.

3. Click New Form/Survey. The Create Survey window will display.



- 4. Enter a name for your form or survey.
- 5. *Create from scratch* is the default option.

6. Click Save. You are returned to the Forms & Surveys Workspace.



7. Click on the name of your form or survey to begin creating your form or survey.

Forms & Surve	eys forms and surveys f	or your site.				
Forms & Surveys	Item Libraries	Styles	Reports			
New Form/Survey	Import Form/S	urvey				
STATUS TITLE					RESPONSES	ACTIONS
INACTIVE Food	Services Survey	D			0	View Options More v

Copy a Form or Survey

Here's how you copy a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click New Form/Survey. The Create Survey window will display.



- 4. Enter a name for your form or survey.
- 5. Select Copy an existing form/survey.
- 6. Select the form or survey you wish you copy from the Form/Survey drop down.

7. Click Save. You are returned to the Forms & Surveys Workspace.



8. Click on the name of your form or survey to begin creating your form or survey.

Forms & Surve Create and manage f	eys orms and surveys f	or your site.						
Forms & Surveys	Item Libraries	Styles	Reports					
New Form/Survey	Import Form/S	Survey						
STATUS TITLE					RESPONSES	ACTIONS		
INACTIVE 2016	Food Services S	Survey			0	View	Options	More

Import a Form or Survey

You can import a form or survey from the *Forms & Surveys* tool to a new location from a form or survey that you have previously exported from another workspace.

Here's how you import Forms & Surveys.

- 1. In *Site Manager*, navigate to the workspace where you wish to import the Form & Survey.
- 2. Click the **Tools** tab. The Tools window displays.

	Summary Mobile Site Tools Directors & Viewer	s	Channels	Statistics	How do I?
Tools Manage y	our site tools and apps.				
	Files & Folders Organize the files and folders used in your workspace.		On-Screen Al Add or edit On-S	erts Screen Alerts for yo	ur site.
0	Friendly Web Address Mappings Create and edit Friendly Web Address Mappings for your site		Broadcast E- Add or Edit Broa	Alerts dcast E-Alerts for y	vour site.
	Forms & Surveys Create and manage forms and surveys for your site.	1	Section Robo	t with pre-defined se	ction configurations.
	Approve Visitor Comments Approve or reject visitor comments on your apps.	(5)	Approve Com Approve or reject	munity Editing	to your apps.
4	App Manager Manage and edit the apps in your workspace.		Reports View your site's	reports.	
	Photo Gallery Create and manage photo galleries for your site.		Minibase Create and man	age minibases for y	vour site.

3. Select Forms & Surveys. The Forms & Surveys window displays.

	iornia una aurveya i	for your site.		
orms & Surveys	Item Libraries	Styles	Reports	
New Form/Suprov	Import Form/S	Survey		
New FormSurvey				

- 4. On the Forms & Surveys tab, click Import Form/Survey.
- 5. Locate and select the Forms & Surveys compressed export file.

Insert Items to a Form or Survey

You can choose to create new items, copy existing items or add items from the Item Library for a form or survey.

Insert a New Item

Here's how you insert a new item into a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.

*	Summary Mobile Site Tools Directors & Vie	wers	Channels Statistics How do I?
Tools Manage y	our site tools and apps.		
6	Files & Folders Organize the files and folders used in your workspace.		On-Screen Alerts Add or edit On-Screen Alerts for your site.
0	Friendly Web Address Mappings Create and edit Friendly Web Address Mappings for your site		Broadcast E-Alerts Add or Edit Broadcast E-Alerts for your site.
	Forms & Surveys Create and manage forms and surveys for your site.	1	Section Robot Import sections with pre-defined section configurations
	Approve Visitor Comments Approve or reject visitor comments on your apps.	(5)	Approve Community Editing Approve or reject community edits to your apps.
4	App Manager Manage and edit the apps in your workspace.		Reports View your site's reports.
	Photo Gallery Create and manage photo galleries for your site.		Minibase Create and manage minibases for your site.

3. Click on the name of the form or survey you wish to edit.

Forms & Surve Create and manage f	eys orms and surveys	for your site.							
Forms & Surveys	Item Libraries	Styles	Reports						
New Form/Survey	Import Form/S	Survey							
STATUS TITLE					RESPONSES	ACTIONS			
	Food Services S	Survey			0	View	Options	More	•

4. Click Insert. The Create New Item window displays.



5. Choose the type of item you wish to insert using the Choose an Item Type drop down.

Create New Item Choose an item type, copy an existing item, or insert an item from	your l	tem Library.		
Choose an Item Type Please Select	or	Copy Existing Item	or	Insert From Library
Cancel				

6. Enter the required information for the item. Required fields will have a red triangle in the upper right hand corner.

7. Click Save. Your item is inserted.

Choice - True/False	• or	Copy Existing Item	or Insert From Library
Question			
Enter the question. Jse this field to enter the text for your question or input	t prompt.		
Enter the question alias.			
Enter alternate text for use in the reports. If blank, the	actual question w	ill be displayed.	
Enter the sub-text.			
Enter informational or additional text to display below the	ne question.		
validation Options			
Check this box if an answer to this question is real	quired.		
Default value.	ion.		
This value will be selected as the default for this quest			
Default value. This value will be selected as the default for this quest None Display type			
Default value. This value will be selected as the default for this quest None Display type. Select the format for the response to the True/False q	uestion.		

- 8. You can continue to insert new items two ways.
 - 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.

Copy an Existing Item

Here's how you insert a copied item into a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click on the name of the form or survey you wish to edit.

Forms & Surver	eys forms and surveys	for your site.						
Forms & Surveys	Item Libraries	Styles	Reports					
New Form/Survey	Import Form/S	Survey						
STATUS TITLE					RESPONSES	ACTIONS		
	Food Services S	Survey			0	View	Options	More w

4. Click Insert. The Create New Item window displays.



5. Click **Copy Existing Item**. The Copy Item window displays.

Create New Item Choose an item type, copy an existing item, or i	nsert an item from your Item Library.
Choose an Item Type Please Select	or Copy Existing Item or Insert From Library
Cancel	

6. Select the item you wish to copy and click **Continue**. The Modify Item window displays.

Copy Item	
Copy an item from a survey you have created in this area.	
Continue	
Europe	
Survey:	
Survey: Food Services Survey	¥
Survey: Food Services Survey Item:	×

7. Edit the item as needed.

Choose an in	em Type			
Choice - Or	ne Answer (Option Buttons)			
Question				
Enter the que	stion.			
Use this field to	enter the text for your question or input prompt.			
Where do	you normally get lunch on school days?			
Enter the que Enter alternate	stion alias. text for use in the reports. If blank, the actual question will be disp	blayed.		
Enter the sub	-text.			
inter informatio	nai or additional text to display below the question.			
Validation	Options			
Required	y con • proprior and a constant of			
Check this	box if an answer to this question is required.			
Answer align Select the way	ment. answers should be aligned on the page.			
Answer align Select the way Vertic al Minimum nun Enter the minim Maximum nun Enter the maxim	ment. answers should be aligned on the page.			
Answer align Select the way Vertical Minimum nun Enter the minim Maximum nun Enter the maxim Answers	ment. answers should be aligned on the page. mber of responses. mmer of responses. mm number of responses that must be checked.			
Answer align Select the way Vertical Minimum nun Enter the minim Answers Select answe	ment. answers should be aligned on the page. mber of responses. mum number of responses that must be checked. mber of responses that must be checked. r choices. of answers or enter the answers below.			
Answer align Select the way Vertical Minimum nun Enter the minim Maximum nu Enter the maxim Answers Select answe Select answe Select answe	ment. answers should be aligned on the page. mber of responses. mum number of responses that must be checked. r choices. of answers or enter the answers below. wer group (optional)			
Answer align Select the way Vertical Minimum nun Enter the minim Maximum nu Enter the maxim Enter the maxim Select answers Select answe Select answers Select answers Select answers	ment. answers should be aligned on the page.			
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Answer align Belect the way Vertical Minimum num Inter the minim Maximum num Enter the maxim Maximum num Enter the maxim Answers Select answe Select	ment. answers should be aligned on the page. mber of responses. um number of responses that must be checked. mber of responses that must be checked. r choices. of answers or enter the answers below. wer group (optional) wers. ue answers in the text boxes below. ue school cafeteria. my lunch.	Default Default		points
Answer align Select the way Vertical Minimum num Enter the minim Maximum nu Enter the maxim Answers Select answe Select answe Select answe Select answe Enter the ans Enter the ans Ente	ment. answers should be aligned on the page	© Defaut © Defaut		points points points
Answer align Select the way Vertical Minimum num Enter the minim Maximum nu Enter the maxim Answers Select answe Select An	ment. answers should be aligned on the page. mber of responses. um number of responses that must be checked. mber of responses that must be checked. r choices. of answers or enter the answers below. wer group (optional) wers. us achool cafeteria. my lunch. eat lunch nswer	© Defaut © Defaut		points points points
Answer align Select the way Vertical Minimum num Enter the minim Maximum num Enter the maxim Maximum num Enter the maxim Answers Select answe Select	ment. answers should be aligned on the page. mber of responses. um number of responses that must be checked. mber of responses. num number of responses that must be checked. r choices. of answers or enter the answers below. ver group (optional) vers. ue answers in the text boxes below. ue school cafeteria. my lunch. eat lunch nswer ittional answer. box if you would like an additional "Other" answer to allow surve the "Other" prompt in the text box below.	Default Default Default y takers to give	a different	points points points ant answer. You may edit
Answer align Select the way Vertical Minimum num Enter the minim Maximum num Enter the maxim Answers Select answe Select a	ment. answers should be aligned on the page. There of responses. um number of responses that must be checked. There of the of	© Default © Default © Default y takers to give	a different	points points points answer. You may edit
Answer align Select the way Vertical Minimum num Enter the minim Maximum num Enter the maxim Maximum num Enter the maxim Answers Select answe Select	ment. answers should be aligned on the page. mber of responses. um number of responses that must be checked. mber of responses that must be checked. r choices. of answers or enter the answers below. wer group (optional) wers. ue answers in the text boxes below. ue school cafeteria. ny lunch. eat lunch nswer littonal answer. box if you would like an additional "Other" answer to allow surve the "Other" prompt in the text box below. lease specify type of control that should be used to for the additional answer.	Default Default Default y takers to give	a differen	points points points nt answer. You may edit

8. Click **Save**. Your item is inserted.

Add an Item from an Item Library

Here's how you insert an item from an Item Library into a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click on the name of the form or survey you wish to edit.

STATUS TITLE	RESPONSES ACTIONS
INACTIVE 2016 Food Services Survey	0 View Options More v

4. Click Insert. The Create New Item window displays.

'Food Services Survey' Items	
Make changes to your form or survey items or pages below.	
	\bigcirc
Click on the Insert button to add an item have	Insert

5. Click Insert from Library. The Insert From Library window displays.

				Choose an Item Type
ise Select or Copy Existing Item or Insert From L	Library	or Insert From Li	Copy Existing Item	Please Select

6. Select the item you wish to insert and click **Continue**. The Modify Item window displays.

7. Edit the item as needed.

	H T		
Cho	oice - One Answer (Option Buttons)		
Que	estion		
Ente	r the question.		
Whe	re do you normally get lunch on school days?		
Ente	r the question alias.		
Enter	alternate text for use in the reports. If blank, the actual question will be dis	played.	
Ente	r the sub-text.		
Enter	informational or additional text to display below the question.		
Val	idation Options		
	Required.		
1	Check this box if an answer to this question is required.		
Ansv Selec Ve	Check this box if the answers to this question should be displayed in rando wer alignment. It the way answers should be aligned on the page. rtical	m order.	
Ansı Selec Ve Minii Enter	Check this box if the answers to this question should be displayed in rando wer alignment. The way answers should be aligned on the page. trical mum number of responses. The minimum number of responses that must be checked. The maximum number of responses that must be checked.	m order.	
Ansv Selec Ve Minii Enter Max Enter	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical • num number of responses. the minimum number of responses that must be checked. mum number of responses that must be checked. the maximum number of responses that must be checked. Swers	m order.	
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Ansu Selec Ve Minin Enter Maxi Enter Sele Selec Se	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. tical • num number of responses. the minimum number of responses that must be checked. mum number of responses that must be checked. the maximum number of responses that must be checked. swers ct answer choices. ta group of answers or enter the answers below. lect answer group (optional) • r the answers.	m order.	
Ansu Selec Ve Minii Enter Maxi Enter Sele Selec Sele Ente	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical mum number of responses. the minimum number of responses that must be checked. mum number of responses. the maximum number of responses that must be checked. Severs ta group of answers or enter the answers below. lect answer group (optional) r the answers. each of the answers in the text boxes below.	m order.	
Ansy Selec Ve Minin Enter Max Enter Selec Selec Selec Selec Selec Inter	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. tical • num number of responses. the minimum number of responses that must be checked. mum number of responses. the maximum number of responses that must be checked. weres ct answer choices. ta group of answers or enter the answers below. lect answer choic (optional) • r the answers. each of the answers in the text boxes below. From the school cafeteria.	m order.	points
Ansy Selec Ve Minili Enter Max Enter Selec Selec Selec Enter 1	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical • num number of responses. the minimum number of responses that must be checked. mum number of responses. the maximum number of responses that must be checked. swers ct answer choices. t a group of answers or enter the answers below. lect answer group (optional) • r the answers. each of the answers in the text boxes below. From the school cafeteria. I bring my lunch.	Default Default	points points
Ansy Select Ve Minin Enter Maxi Enter Select	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical mum number of responses. the minimum number of responses that must be checked. mum number of responses that must be checked. the maximum number of responses that must be checked. Severs ct answer choices. t a group of answers or enter the answers below. lect answer group (optional) r the answers. each of the answers in the text boxes below. From the school cafeteria. I bring my lunch. I do not eat lunch	Default Default Default Default Default	points points points
Ansu Selec Ve Minili Enter Max Enter Selec Se Ente Enter 1 2 3 1 1	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical Turn number of responses. the minimum number of responses that must be checked. Turn number of responses that must be	Default Default Default Default Default	points points points
Ansy Select Ve Minii Enter Maxi Enter Select	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical • mum number of responses. the minimum number of responses that must be checked. mum number of responses. the maximum number of responses that must be checked.	m order.	points points points ferent answer. You may edit
Ansu Select Ve Minin Enter Maxi Enter Select	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. trical The minimum number of responses. the minimum number of responses that must be checked. The maximum number of responses that must be checked. The answer choices. t a group of answers or enter the answers below. The answers: The answers in the text boxes below. From the school cafeteria. Thoing my lunch. The number of the prompt in the text box below. Check this box if you would like an additional "Other" answer to allow surver text of the "Other" prompt in the text box below.	m order.	points points points ferent answer. You may edit
Ansu Select Ve Minim Enter Max Enter Select	Check this box if the answers to this question should be displayed in rando wer alignment. the way answers should be aligned on the page. tical • num number of responses. the minimum number of responses that must be checked. mum number of responses. the maximum number of responses that must be checked. weres ct answer choices. ta group of answers or enter the answers below. lect answer group (optional) • r the answers. each of the answers in the text boxes below. From the school cafeteria. 1 bring my lunch. 1 do not eat lunch ert New Answer Check this box if you would lie an additional "Other" answer to allow surve he text of the "Other" prompt in the text box below. Other, please specify Select the type of control that should be used to for the additional answer.	m order.	points points points ferent answer. You may edit

8. Click **Save**. Your item is inserted.

Manage Pages in a Form or Survey

You can create multiple pages within a form or survey.

Insert a New Page in a Form or Survey

Here's how you insert a new page in a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.

A	Summary Mobile Site Tools Directors & Viewe	ers	Channels	Statistic s	How do I?
Tools Manage y	our site tools and apps.				
	Files & Folders Organize the files and folders used in your workspace.		On-Screen Al Add or edit On-S	erts Screen Alerts for yo	ur site.
0	Friendly Web Address Mappings Create and edit Friendly Web Address Mappings for your site		Broadcast E- Add or Edit Broa	Alerts idcast E-Alerts for y	our site.
	Forms & Surveys Create and manage forms and surveys for your site.	1	Section Robo Import sections	t with pre-defined se	ction configurations.
	Approve Visitor Comments Approve or reject visitor comments on your apps.	<u>a</u>	Approve Com Approve or rejet	munity Editing	to your apps.
-	App Manager Manage and edit the apps in your workspace.		Reports View your site's	reports.	
	Photo Gallery Create and manage photo galleries for your site.		Minibase Create and man	age minibases for y	our site.

3. Click on the name of the form or survey you wish to edit.

Forms & Surve Create and manage for	:ys prms and surveys f	or your site.			
Forms & Surveys	Item Libraries	Styles	Reports		
New Form/Survey	Import Form/S	Survey			
STATUS TITLE				RESPONSES	ACTIONS
	Food Services S	Survey		0	View Options More

- 4. In your form or survey navigate to where you wish to insert a new page.
- 5. Click New Page to insert a new page after the page you are currently on.

	New Page
Pg. 1 - [No Title Entered]	
Edit Properties Copy Page Delete Page	

6. You can also click the **More** drop down next to an item and select *Break* to add a page break above that item.

Copy a Page in a Form or Survey

Here's how you copy a page in a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click on the name of the form or survey you wish to edit.

Forms & Surve Create and manage f	eys forms and surveys	for your site.						
Forms & Surveys	Item Libraries	Styles	Reports					
New Form/Survey	Import Form/S	Survey						
STATUS TITLE					RESPONSE	S ACTIONS		
	Food Services S	Survey			0	View	Options	More w

- 4. In your form or survey navigate to the page you wish to copy.
- 5. Click **Copy Page**. The page is copied.



Delete a Page in a Form or Survey

Here's how you delete a page in a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click on the name of the form or survey you wish to edit.

Forms & Surve Create and manage f	eys orms and surveys	for your site.						
Forms & Surveys	Item Libraries	Styles	Reports					
New Form/Survey	Import Form/S	Survey						
STATUS TITLE					RESPONSE	S ACTIONS		
	Food Services S	Burvey			0	View	Options	More w

4. In your form or survey navigate to the page you wish to delete.

Pg. 1 - [No Ti	tle Entered]		
Edit Properties	Copy Page	elete Page	

- 5. Click **Delete Page**. A confirmation dialog displays.
- 6. Click **OK**. Your page is deleted and you are returned to your form or survey in Edit Mode.

Edit Properties for a Page in a Form or Survey

Here's how you edit properties for a page in a form or survey.

- 1. In *Site Manager*, navigate workspace to which you wish to create your form or survey.
- 2. Navigate to the **Tools** tab and click *Forms & Surveys*.



3. Click on the name of the form or survey you wish to edit.

Edit Page Properties	
if you want, you can add a page title and page introduction to your page.	
Page No:	
2	
Page Title:	
Page Introduction:	
Save Cancel	

4. Once finished, click **Save**. You are returned to your form or survey in Edit Mode.

Set Forms & Surveys Options

Web Community Manager allows you to modify the default options set for a form or survey that you create.

General Tab

On the **General** tab, you can change the name of your form or survey, edit the status of your form or survey, assign owners, enter the Admin Email address and edit the start and end date.

General Di	splay Access	Completion Repor	Advanced		
Name:					
2016 Sc	hool Safety Sur	vey			
Status:					
Owners: Enter the user i	name for all owners of this	s survey, separated by a	semi-colon.		
rwilson;					
Admin Email: Enter one emai	address which will be us	ed as the 'from' address	for emails from th	is survey.	
rwilson@hv	sd.org				
Date Created	:				
10/27/2016					
Start Date:					
10/27/2016					
End Date:					
11/26/2016					

Display Tab

On the **Display** tab you can choose the Style, Page Numbering, Question Numbering and Survey Navigation for your form or survey.

Ly IC.				
et the look and feel of	your form/survey by select	ting a style.		
Defa <mark>u</mark> lt Template		•	Preview	
age Numbering:				
Display progress a	as a progress bar	•		
uestion Numbering	j:			
Number questions Survey Navigat	within entire survey			
Number questions Survey Navigat Back Button: Display	within entire survey	•		
Number questions Survey Navigat Back Button: Display Save Button:	within entire survey	•		
Number questions Survey Navigat Back Button: Display Save Button: Display	within entire survey	•		
Number questions Survey Navigat Back Button: Display Save Button: Display Cancel Button:	within entire survey	•		

Access Tab

On the **Access** tab you can choose response access and submission options, whether a login will be required, if responses can be updated and add IP address validation. You can also control the total number of responses allowed for the survey in additional to the number of responses per person and control the number of days the survey is available for a person to edit responses.

- Circi ci	Display	Access	Completion	Report	Advanced				
Bachor	adapt Ac								
Authenti	ication:	Cess Levi							
Anony	mous			•					
IP Addi	ress Ran	de							
There are	no IP addre	ss ranges co	onfigured for this s	survey. Click t	the "Configure	" button to	add IP add	ress validation (or to learn more.
Deserve			Ontions						
Respons	ndent Su se Type:	bmission	Options						
Respor Respons Multiple	n dent Su se Type: e Respons	bmission ses Not Up	Options	T					
Respons Respons Multiple Max No.	ndent Su se Type: e Respons of Respon	bmission ses Not Up ses:	Options	×					
Respons Respons Multiple Max No. Enter the	ndent Su se Type: e Respons of Respon maximum nu	bmission ses Not Up ses: umber of resp	Options dateable	▼ Ivey.Leave b	lank for unlimi	ed respon:	ses.		
Respons Respons Multiple Max No. Enter the	ndent Su se Type: e Respons of Respon maximum nu	bmission ses Not Up ses: umber of resp	Options dateable	▼ Irvey.Leave b	lank for unlimi	ed respons	ses.		
Respons Respons Multipl Max No. Enter the No. of Re	ndent Su se Type: e Respons of Respon maximum nu esponses p	bmission ses Not Up ses: umber of resp per User:	Options dateable	▼ Ivey.Leave b	lank for unlimi	ed respon:	ses.		
Respons Respons Multiple Max No. Enter the left No. of Re Multiple Re	ndent Su se Type: e Respons of Respon maximum nu esponses p esponse su	bmission ses Not Up ses: umber of resp per User: rveys only, er	Options dateable conses for this su	vey.Leave b	lank for unlimi esponses per	ed respons	ses. e blank for	unlimited respo	nses.
Respons Multipl Max No. Enter the No. of Re Multiple R	ndent Su se Type: e Respons of Respon maximum nu esponses p esponse sur	bmission ses Not Up ses: umber of resp per User: rveys only, er	Options dateable conses for this su	▼ Irvey.Leave b	lank for unlimi	ed respon: user. Leav	ses. e blank for	unlimited respo	nses.
Respons Multipl Max No. Enter the I No. of Re Multiple Ro Days for Enter the I levels that	ndent Su se Type: e Respons of Respon maximum nu esponses p esponse sur Update: number of da t are updates	bmission ses Not Up ses: umber of resp per User: rveys only, er ays during wl able.	Options dateable conses for this su nter the maximum hich a responden	Invey.Leave bin number of retaining the transformation of transformat	lank for unlimi esponses per their respons	ed respons user. Leav	ses. e blank for on applies 1	unlimited respo o respondent a	nses. ccess

Forms & Surveys Respondent Access & Submission Levels

When creating a form or survey, there are parameters you can set that impact how respondents access your form or survey and whether they may update previously submitted data. These are the **Respondent Access Level Options** and the **Respondent Submission Option, Response Type**.

- 1. Respondent Access Levels
 - Authentication. Here you restrict access to your form or survey to registered users who must log in to access the form or survey (*Login Required*) or make it available to anyone (*Anonymous*).

- IP Address Range. Here you restrict access to your form or survey to a group of workstations within a set range of IP Addresses. Only IP Addresses within the specified range may access your form or survey.
- 2. Respondent Submission Option Response Type
 - **Single Response Updateable**. This option permits respondents to complete a form or survey only once but they are able to return to the form or survey to update previously submitted data.
 - **Single Response Not Updateable**. This option permits respondents to complete a form or survey only once but they are unable to return to the form or survey to update previously submitted data.
 - **Single Response Resumable**. This options permits respondents to return to a form or survey which they have started in order to complete it.
 - **Multiple Responses Not Updateable**. This option permits respondents to complete multiple instances of a form or survey. Respondents cannot update prior responses.
 - **Multiple Kiosk Not Updateable**. This option permits the use of a bank of designated workstations for the completion of a form or survey. The data submitted cannot be updated by respondents.
 - Manual Multiple Response Entry. This option allows for the continuous entry of previously collected data (e.g., pencil and paper responses) into a form or survey so that the data is stored electronically and can be exported or shared with others.

Completion Tab

On the **Completion** Tab you can select a Completion Action, edit the Completion Message and add a **Completion URL** to redirect the user to a certain page after filling out the form. By default, the browser will close after completing the form. **Button Display** allows you to choose buttons that will display on the completion page. **Send Responses To** controls who will receive the responses to the form or survey. You can enter multiple email addresses.

General	Display	Access	Completion	Report	Advan	iced			
Completion	n Action:								
Display I	Message								
Completion	n Message:								
1	ж		B I	U	E	E I	8	Ω	3
Thank yo	u for taking) the survey	d.						
р									
Completion Enter the we	n URL: b address for	the Continue	button.						
Button Dis Check the b Close	play: uttons to disp Button	lay on the sur	vey completion	page.					
 View R Print R 	eports Button esponse B	ton utton							
Send Resp Enter email a	oonses To: addresses se	parated by se	mi-colons.						

Report Tab

On the **Report** tab you can select a report format, manage report security and choose to highlight responses.

General	Display	Access	Completion	Report	Advanced
Report For	mat:	and the base of the second		Non-Jaw Da	
Bar Grap	h 🔹	which to disp	lay the Results C	Verview Re	port.
Report See	curity: to allow only	owners to view	v reports, 'Semi-	private' to all	ow all users to view overview results and only owners
High C	wners only			•	
Highlight F Select 'Yes' No	to mark each	response sele	cted by a user.		

Advanced Tab

On the **Advanced** tab you can configure hidden fields. Hidden fields can be added when there are no responses to your survey.

Access Durations for Forms & Surveys

When you create a form, start and end dates are automatically added to the form.

The start date added to the form is the current date. The start time defaults to the time that the form was created. You can modify the start date, however, you cannot modify the start time.

The end date added to the form is one month later than the start date. The end time defaults to 11:59 PM, meaning that the form expires at the end of the day on the end date specified. You can modify the end date, however, you cannot modify the end time.

Session Time Out for Forms & Surveys

As an end user completing a form or survey, you will receive a timeout message after 20 minutes of inactivity. If you resume activity, the clock will reset. You will not lose your answers.

Publish a Form or Survey

You have five different options to publish your form or survey.

View a Form or Survey

Here's how you view a form or survey.

- 1. In *Site Manager*, navigate to the workspace where the Form & Survey is located.
- 2. Click the **Tools** tab.
- 3. Select Forms & Surveys.

STATUS	TITLE	RESPONSES	ACTIONS		
ACTIVE	Course Evaluation	0	View	Options	More w
			-		

4. To the right of the form or survey, click **View**.

Locate the Link a for Form or Survey

Here's how you locate the link (URL) for a form or survey in the Forms & Surveys tool.

- 5. In *Site Manager*, navigate to the workspace where the Form & Survey is located.
- 6. Click the **Tools** tab.
- 7. Select Forms & Surveys.
- 8. To the right of the form or survey, click **View**.

STATUS	TITLE	RESPONSES ACTIONS	
ACTIVE	Course Evaluation	0 View Options More V	
		\smile	

9. Copy the Link (URL) in the Address Bar of the Form & Survey window that displays on your screen.



Embed a Form & Survey Using the Embed Code App

Here's how you embed a Form & Survey within an Embed Code app.

- 1. Obtain the URL for the form & survey that you wish to embed. To obtain the URL, **View** the form & survey and copy the URL that displays in the browser Address Bar.
- 2. Navigate to a workspace and add or edit an Embed Code app on a page.
- 3. Enter the following code into the app. Replace the sample URL with the one you obtained above. Replace the *Click here to take the survey* text if you like.

Click here to take the survey

Embed Code App	
Save	
<pre>Click here to take the survey</pre>	

4. Click **Save**. When visitors to your end-user website click the link, the form & survey opens in a new window.

Map a Page to Forms & Surveys

Here's how you map a page to a form or survey created with the Forms & Surveys tool.

- 1. Once you've located and copied the link for your form or survey, navigate to the Section Workspace containing the page you wish map to the Form or Survey in *Site Manager*.
- 2. Click **Actions** to the right of the page.
- 3. Select *Page Options* from the drop-down list. The Page Options dialog displays.



- 4. Paste the URL of the Form or Survey in the Map to Web Address field.
- 5. Click Save. The Summary tab of the Section Workspace displays.

Map a Section to Forms & Surveys

Here's how you map a section to a form or survey created with the Forms & Surveys tool.

- 1. Once you've located and copied the link for your form or survey, navigate to the Channel Workspace containing the section you wish map to the Form or Survey in *Site Manager*.
- 2. Click **Options** to the right of the section. The **General** tab of the Section Options dialog displays.
- 3. Click the **Advanced** tab. Paste the URL of the Form or Survey in the Map Section to Web Address field.

General	Advanced
Friendly W Enter the tex If you entered directly to the	Web Address: At for your friendly web address without spaces. Example: athletics ad athletics in this field, visitors could type http://tcalpha.schoolwires.net/athletics to navigate is area of your website.
Map Section	on to Web Address: rs to this web address. Enter a full web address or browse your site.
http://tca	pha.schoolwires.net//cms/module/selectsurvey/TakeSu
Naviga Hide No l Allo	tion Options Section in Channel Navigation .eft Navigation w Navigation Imagery for Pages ble Classic Hierarchy Navigation
Additio	onal Options
🔲 Disp	ay Last Modified Date
Acti Edito	vate Restricted Formatting rs can only use pre-defined styles when formatting content.
Section Co	ode
Allows you t An example	o create a relationship between the section and another system. of a section code would be teacher ID from an existing SIS.

4. Click **Save**. The **Summary** tab of the Channel Workspace displays.

Publish Forms & Surveys in a Link Library

Here's how you publish a form or survey created with the *Forms & Surveys* tool in a Link Library.

- 1. Once you've located and copied the link for your form or survey, navigate to the Workspace containing the Link Library app you wish to use in *Site Manager*.
- 2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit Mode.
- 3. Click on the Link Library app. The app opens.
- 4. Click **New Link**. The New Link window displays.
- 5. Paste the URL of the Form or Survey in the Address field. Complete the rest of the New Link fields as needed.

Display Duration					
nk Title:				_	
School Safety Survey					
escription:		1			
	• • • E	EE	∃ 8 1	Ω 🖞	- (
P					

6. Click **Save**. The link to the Form or Survey is added to the Link Library App and you are returned to the workspace.

Publish Forms & Surveys in a Site Shortcuts App

Here's how you publish a form or survey created with the *Form & Survey* tool in a Site Shortcuts app.

- 1. Once you've located and copied the link for your form or survey, navigate to the Workspace containing the Site Shortcuts app you wish to use in *Site Manager*.
- 2. Click **Actions** to the right of the page and select *Edit Page* from the drop-down list. The page opens in Edit Mode.
- 3. Click on the Site Shortcuts app. The app opens.
- 4. Click **New Link**. The New Link window displays.
- 5. Paste the URL of the Form or Survey in the Web Address field. Complete the rest of the New Link fields as needed.

New Link Enter your link information.	
General Imagery Viewers	
Enter the web address and link text. If you want, you can change the target, add	a tooltip, set a parent link, and choose to auto expand or activate your link
Link Text:	
School Safety Survey	
Web Address:	
$\left\lceil http://tcalpha.schoolwires.net//cms/module/selectsurvey/TakeSu \right\rceil$	Browse
Target:	
Open in same window (_parent)	
Tooltip:	
Parent Link:	
None	
Auto Expand	

6. Click **Save**. The link to the Form or Survey is added to the Site Shortcuts App and you are returned to the workspace.

Manage Form or Survey Responses

You can analyze, export and clear responses to a form or survey.

Analyze Form or Survey Responses

You can access data from your form or survey from the Reports tab or from the More drop-down.

Here's how you analyze responses for a form or survey.

- 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 **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.



- i. 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*.

You can click on the **More** drop-down list next to the form and select **Analyze Responses** to go directly to the Results Overview.

Export Responses from Forms & Surveys

Here's how you obtain the responses for a Form & Survey.

- 1. Click the **Reports** tab.
- 2. Choose a Form & Survey from the Select a Form or Survey Drop-down list.



- 3. On the Reports dialog that displays, click **Export Data**.
- 4. On the Export Data dialog that displays, accept the default settings or select alternate ones.

5. Click Export Data.



- 6. 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.



Clear Form or Survey Responses

Here's how to clean responses from a form or survey.

1. To the right of the form or survey, click **More** and select *Clear Responses*. A confirmation dialog displays.



2. Type 'CLEAR' and click **Confirm** to clear all responses for your form or survey.

Type 'C	LEAR' to confir	m that you wa	nt to clear a
respon	ses to 2016 Scl	hool Safety Su	rvey.
CLE	AR		

Edit a Form or Survey

If you wish to edit a form or survey that has responses, you'll need to clear them first.

Edit a Form or Survey

Here's how you edit a form or survey.

1. Click on the name of the form or survey you wish to edit.

Forms & Surve Create and manage for	eys orms and surveys	or your site.						
Forms & Surveys	Item Libraries	Styles	Reports					
New Form/Survey	Import Form/S	urvey						
STATUS TITLE					RESPONSES	ACTIONS		
INACTIVE Food	Services Surve	D			0	View	Options	More w

2. Make desired changes.

Edit an Item in a Form or Survey

Here's how to edit an item in a form or survey.

- 1. Click on the name of the form or survey you wish to edit.
- 2. Click **Edit** to the right of the question you wish to edit.



3. Make desired changes.

Choose an Item Type	
Presentation - Heading	
Heading	
Enter the heading text.	
Enter the text for the heading.	
	1
Save	

4. Click Save.

Move an Item in a Form or Survey

Here's how to move an item in a form or survey.

- 1. Click on the name of the form or survey you wish to edit.
- 2. Click **Move** to the right of the question you wish to edit. The Move Existing Item window displays.

	More V
Delete	
Copy	
Move	
Pipe	

3. Select where you would like to move your item.

Survey	
Course Evaluation	
Item to Move	
Course Evaluation	
Select Page	
Page 1 - [No Page Title]	
Move Before	
[Move item to end of page]	•

4. Click **Move**. You are returned to your form or survey in edit mode.

You can also click on the arrow buttons to the left of the item. This method will only let you move an item within its current page.

Export a Form or Survey

Here's how you export a form or survey.

- 1. In *Site Manager*, navigate to the Workspace containing the Form or Survey you wish to publish.
- 2. Click the **Tools** tab. The list of available tools displays.
- 3. Click *Forms & Surveys*. The Forms & Surveys window displays.



4. To the right of the form or survey, click **More** and select *Export Form/Survey*.

Delete a Form or Survey

Here's how you delete a form or survey.

- 1. In *Site Manager*, navigate to the Workspace containing the Form or Survey you wish to publish.
- 2. Click the **Tools** tab. The list of available tools displays.
- 3. Click *Forms & Surveys*. The Forms & Surveys window displays.
- 4. To the right of the form or survey, click **More** and select *Delete Form/Survey*. A confirmation dialog displays.



5. Type 'DELETE" and click **Confirm** to delete your form or survey. You are returned to the Forms & Surveys Workspace.

Confirm Delete	
Type 'DELETE' to confirm tha Course Evaluation.	t you want to delete
DELETE	
Confirm	

Forms & Surveys Recommended Practices

Here are some recommended practices 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 the 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.