

# Microsoft Forms: for polls and surveys

## Contents

What is Forms on Microsoft 365?.....	2
Where do I find the Forms App?.....	2
New Form.....	4
Add questions .....	5
Choice.....	6
Add branching.....	8
Text.....	10
Rating .....	12
Date.....	14
Preview your form .....	15
Pictures and Videos.....	16
Change your form theme.....	16
Add a picture to a question .....	17
Add a video to a question .....	19
Add a picture or logo to your form header.....	20
Add questions that allow for file uploads.....	21
Settings for forms.....	28
Who can fill out this form .....	29
Options for responses.....	29
Response Receipts .....	30
Set up your form to not record names .....	31
Share a form with co-authors to collaborate .....	32
Group forms.....	34
Stop sharing a form.....	37
Send a form to collect responses.....	38
Check and share your form results .....	41
View response summary information for your form.....	41
View details for each question .....	42
Check response data for each question.....	42
View form results in an Excel workbook.....	43

## What is Forms on Microsoft 365?

You can use Forms to create polls, surveys, quizzes, and tests for co-workers, service users, etc. You can make sophisticated polls with multiple choices, text answers, dates, branching questions, ratings, and request images in their answers.

You can access responses in real time with detailed analysis and export results to Excel.

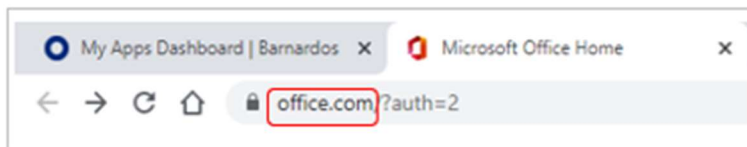
**Note:** when sending forms to Service Users, please ensure:

- ✓ that the data you collect is necessary
- ✓ you are clear on what it will be used for
- ✓ you are abiding by our Data Protection policy

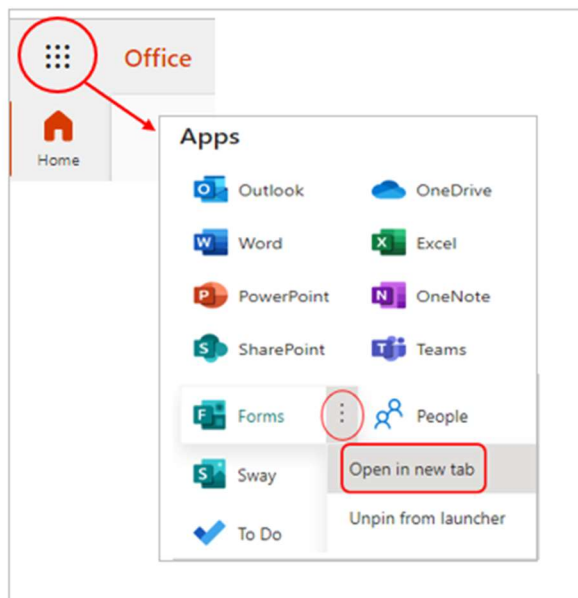
## Where do I find the Forms App?

You can open Forms using the Forms online app itself OR by using OneDrive Online app.

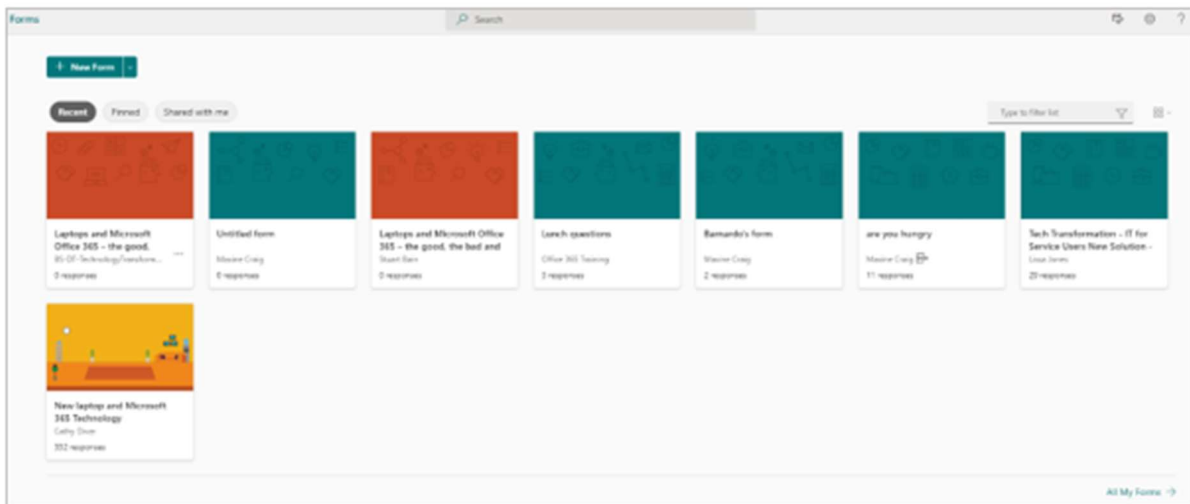
1) Open Microsoft **Forms app** using office.com



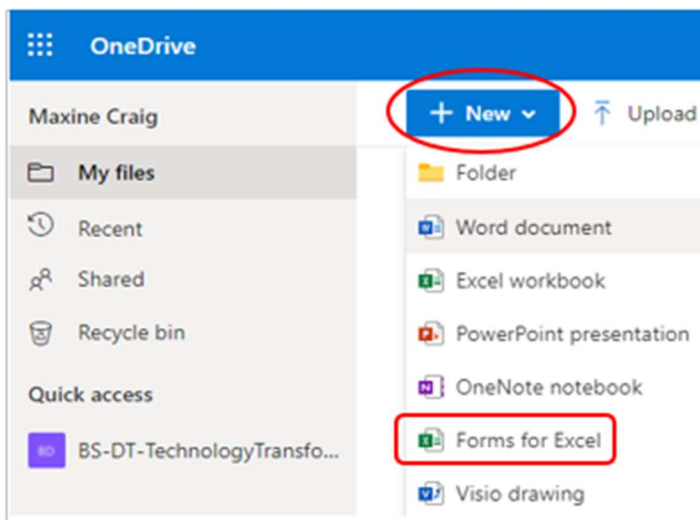
When you get your Office 365 landing page, go into the App Launcher in top left (the nine dots) and choose Forms from the list of apps that opens. You can right click or go into the ellipsis to choose 'open in a new tab.'



The Forms app will open on its home page. It will display any forms and quizzes that you have recently looked at or have had shared with you. All are saved automatically for you.



2) In **OneDrive online** (via Office.com), click onto the New button and choose 'Forms for Excel.'



This will open a new blank form in a web browser tab. The process from here is the same as when you use the Forms app.

## New Form

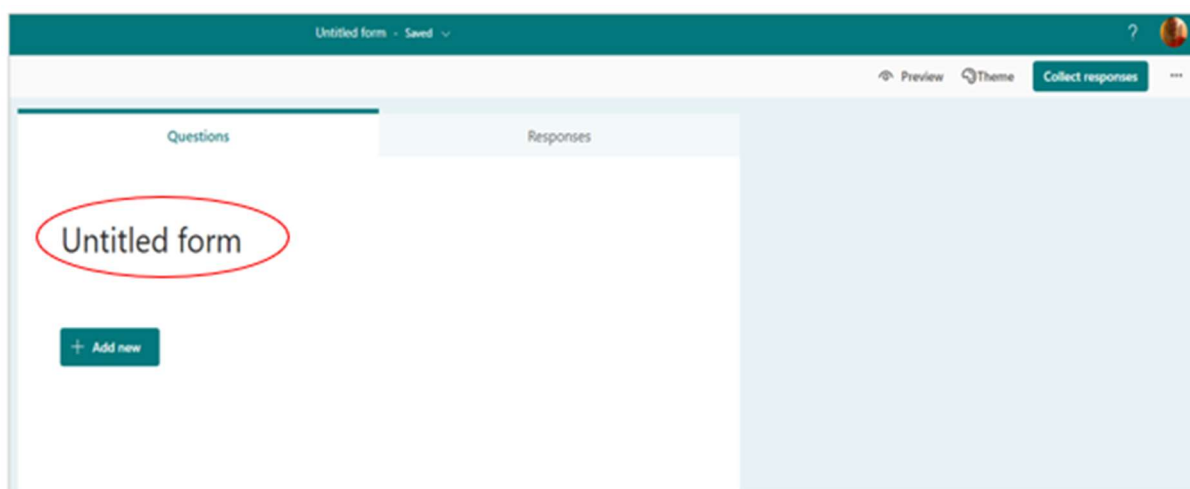
1. To set up a new form, click onto the New Form button at the top.

**Note:** If you want to set up a quiz, click onto the dropdown arrow to choose New Quiz and then consult the separate user guide for Quizzes.



2. When you press New Form, a blank untitled form will open in a new browser tab.

3. Type in your form name where it has 'Untitled form.'

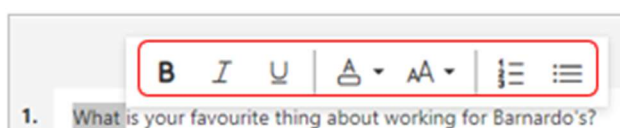


4. If you want to add a description to the title, click into the Title field and a sub-heading will open.



Form titles can have up to 90 characters. Descriptions can have up to 1,000 characters.

**Tip:** You can also format your question text. Highlight a word(s) in your title or questions, and then choose: Bold, Italic, Underline, Font colour, Font size, Numbering, or Bullets.



## Add questions

Click onto 'Add New' for question types to set.



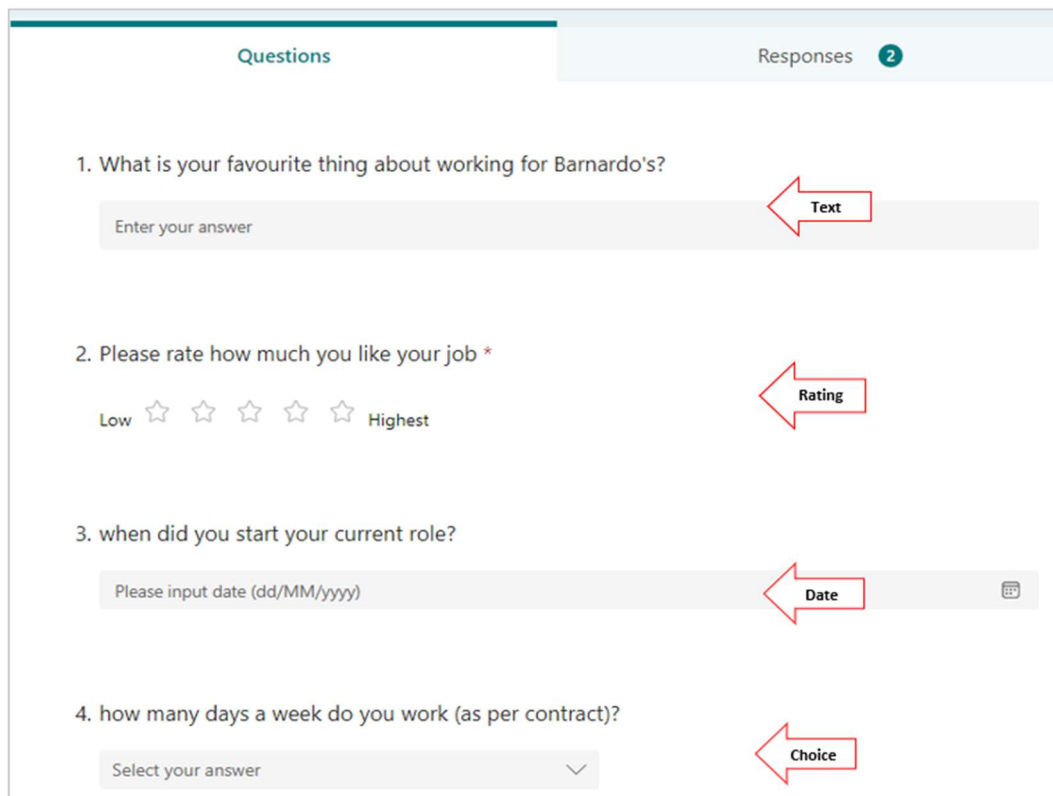
You will see options for choice, text, rating and date, plus a dropdown arrow showing other commands.



Choose what format of question/answer you want to add.

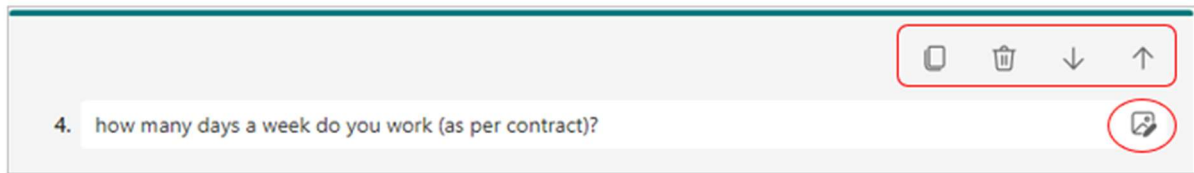
- **Choice:** you set options for respondents to choose.
- **Text:** you allow respondents to type in an answer.
- **Rating:** you ask respondents to rate something with stars or numbers.
- **Date:** you ask respondents to give you a date in their answer.

You can have a mix of these in one Form. For example:

A screenshot of a form titled "Questions" with a "Responses" tab showing 2 responses. The form contains four questions:

- Question 1: "1. What is your favourite thing about working for Barnardo's?" with a text input field and a red arrow pointing to the field labeled "Text".
- Question 2: "2. Please rate how much you like your job \*" with a rating scale from "Low" to "Highest" (five stars) and a red arrow pointing to the scale labeled "Rating".
- Question 3: "3. when did you start your current role?" with a date input field and a red arrow pointing to the field labeled "Date".
- Question 4: "4. how many days a week do you work (as per contract)?" with a choice dropdown menu and a red arrow pointing to the dropdown labeled "Choice".

Note that the form title and every question has an 'Insert media' icon where you can insert an image or video with the question or header. See pages 17-20 for full details.



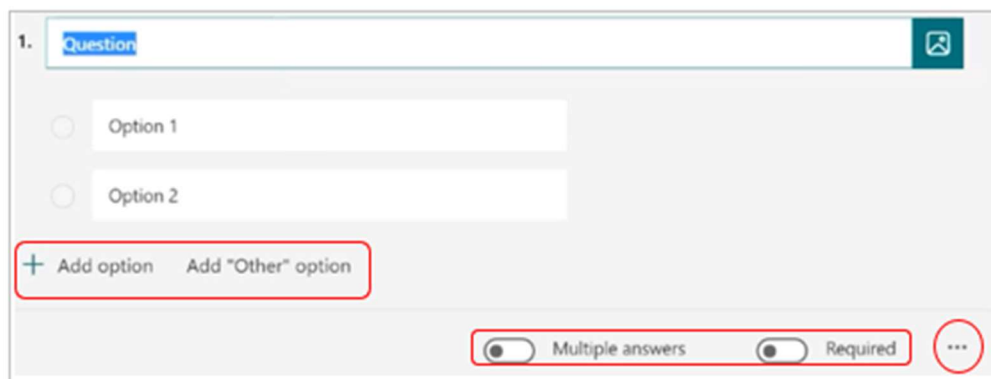
At top right of each question you set there are icons for copy, delete or to move the question up and down in order (the question numbers automatically switch).

### Choice

Click onto Choice.

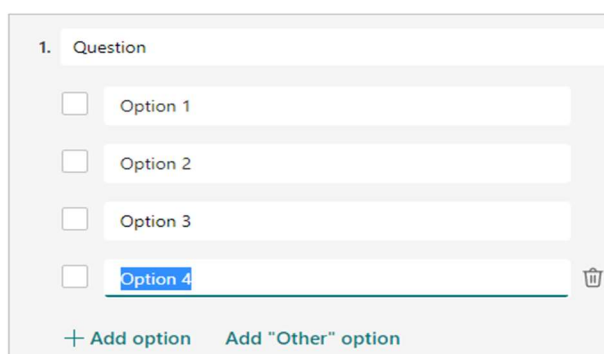


A multiple-choice format question will appear for you to start setting up your form.

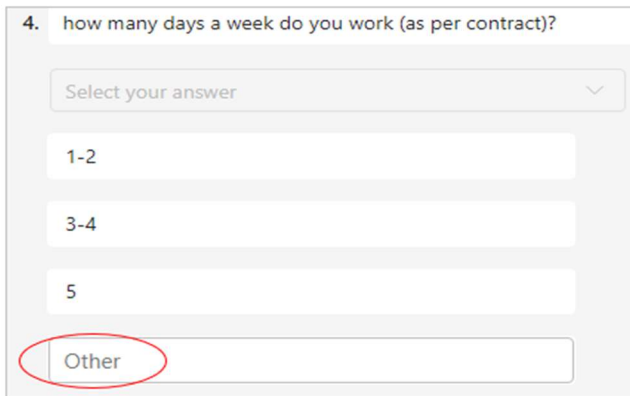


### Options

You can keep adding options as you need - up to 60 can appear as separate options. Any more than that will get grouped as 'Other.' For so many options, it is best to convert to 'drop-down.'



You can choose 'Add "Other" option' to cover replies that don't fit within your chosen options.



4. how many days a week do you work (as per contract)?

Select your answer

1-2

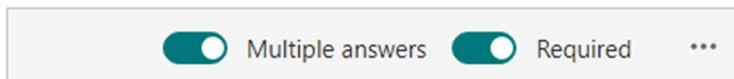
3-4

5

Other

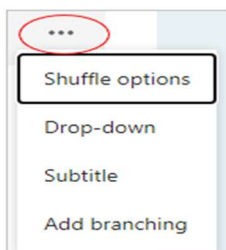
### Multiple answers and mandatory questions

You can set a toggle across to allow multiple answers for a question or to make a question mandatory by using the Required button.



Multiple answers  Required ...

In the ellipsis (the three dots) you can shuffle the options so they are in random order, add a subtitle, add branching or convert the choices to drop-down.



...

Shuffle options

Drop-down

Subtitle

Add branching

### Drop-down

Use this setting if you have a lot of options to list (e.g. over 5). It changes the question from displaying the options to having a drop-down box for respondents to select their choice.



4. how many days a week do you work (as per contract)?

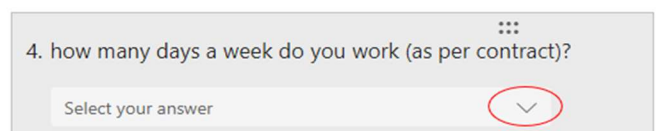
1-2

3-4

5

6

Other



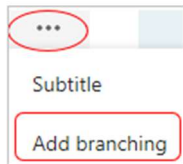
4. how many days a week do you work (as per contract)?

Select your answer

## Add branching

Use this when you want to take respondents to different questions depending on their answer.

Every type of Forms question (choice, text, rating, and date) has an ellipsis which includes an 'Add branching' option. This is true whether you have chosen to create a form or a quiz.

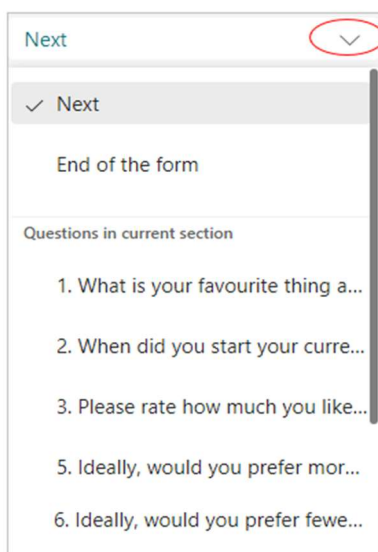


For example, if you are asking something like “Do you have any computers for use by Service Users,” when the reply is Yes, you’d want them to go to a question about how many, etc. But when the reply is No, they would skip that ‘how many’ question and either go to another question or to the end of the form.

1. If you click onto ‘Add branching’ for any of the question types, Forms will add ‘Go to’ branching options against your answer field(s). Default is ‘Next.’

A screenshot of a Microsoft Forms question titled "4. how many days a week do you work (as per contract)?". The question has five radio button options: "1-2", "3-4", "5", "6", and "Other". To the right of the options is a table of branching options. The table has two columns: "Go to" and a dropdown arrow. The "Go to" column contains the word "Next" for each of the five options. The dropdown arrows are circled in red.

2. The drop-down arrow options are the same whether the question type is Choice, Text, Rating or Date, and obviously depend on how many other questions you have in your form.

A screenshot of the Microsoft Forms branching dropdown menu. The menu is open, showing a list of options. The top option is "Next", which is selected and has a checkmark. Below it is "End of the form". Underneath is a section titled "Questions in current section" which lists six questions: "1. What is your favourite thing a...", "2. When did you start your curre...", "3. Please rate how much you like...", "5. Ideally, would you prefer mor...", and "6. Ideally, would you prefer few...". The dropdown arrow at the top right of the menu is circled in red.



3. Choose Next, End of the form or any of your other questions for the respondent to be directed to, depending on your other questions and what you want to find out.

4. how many days a week do you work (as per contract)?

<input type="radio"/> 1-2	Go to	Next	▼
<input type="radio"/> 3-4	Go to	5. Ideally, would you prefer mo...	▼
<input type="radio"/> 5	Go to	6. Ideally, would you prefer fe...	▼
<input type="radio"/> 6	Go to	6. Ideally, would you prefer fe...	▼
<input type="radio"/> Other	Go to	End of the form	▼

5. Ideally, would you prefer more hours?

Yes

No

Maybe

6. Ideally, would you prefer fewer hours?

Yes

No

Maybe

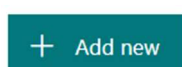
4. There is no 'Save' button in branching, just use the back arrow once you have set the choices.

← Back

Branching options

1. What is your favourite thing about working for Barnardo's? \*

Click on Add New any time you want to add another question to your form.



## Text

This type allows people to input their answer in text (up to 4,000 characters).

1. What is your favourite thing about working for Barnardo's?

Click onto Text.



A new text-format question will appear for you to create.

2. Question

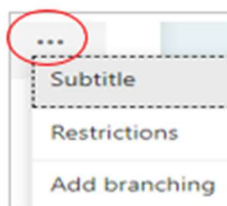
Long answer  Required ...

You can switch to allow a longer answer box, which means that, when the respondents are typing their reply, the answer box displays all their text.

You can also use a toggle to make the question mandatory.

Long answer  Required ...

In the ellipsis you can add a subtitle, set restrictions on the reply or add branching.



## Restrictions

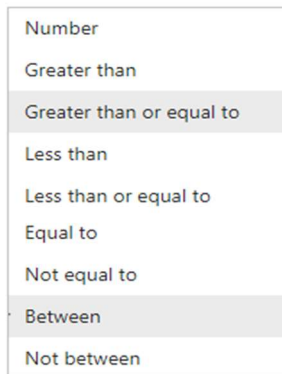
Only use Restrictions if you want the answer to be input as a number.

If you choose Restrictions, the answer box changes to 'the value must be a number.'

6. Question

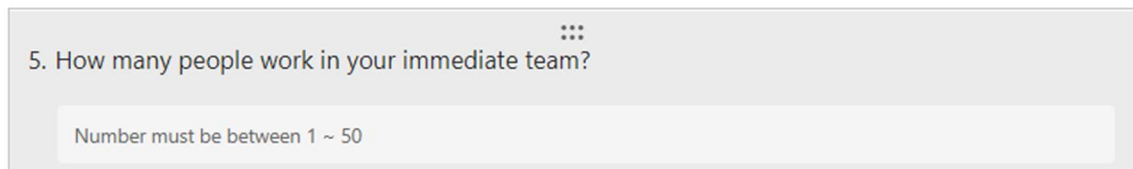
Restrictions Number

You then use the dropdown 'Number' arrow to set the number limit (e.g. greater than, equal to, less than, between, not between, not equal to).



Number
Greater than
Greater than or equal to
Less than
Less than or equal to
Equal to
Not equal to
Between
Not between

For example, if you set that the number must be between 1 and 50, the respondent will see the question like this:



5. How many people work in your immediate team?

Number must be between 1 ~ 50

### **Add branching**

For full details of how to use branching, go to pages 8-9.

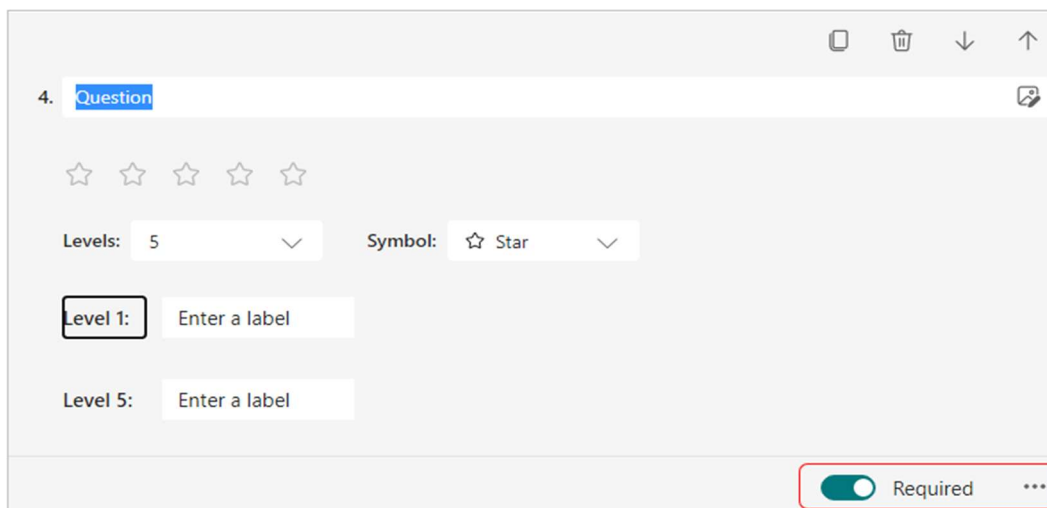
## Rating

Use this if you are asking for people to rate something in your question.

Click onto Rating.

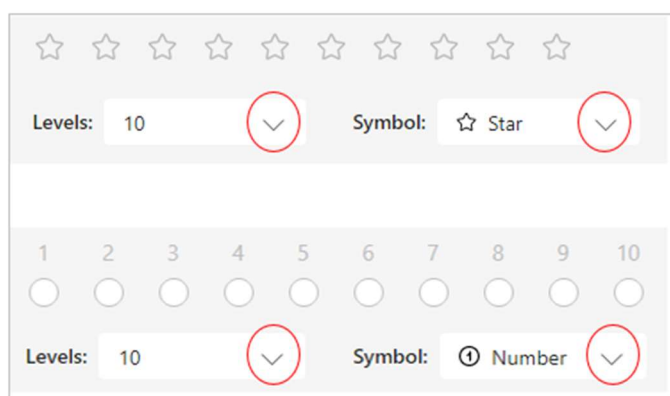


A rating-format question will appear for you to start setting up your form.

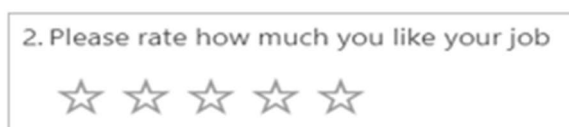
A screenshot of the Microsoft Forms editor interface. At the top, there are icons for copy, delete, down arrow, and up arrow. Below that, the question text '4. Question' is shown. Underneath, there are five star icons. The 'Levels' dropdown is set to '5' and the 'Symbol' dropdown is set to 'Star'. Below these are two input fields: 'Level 1: Enter a label' and 'Level 5: Enter a label'. At the bottom right, there is a 'Required' toggle switch which is turned on, and a three-dot menu icon.

Use the Required toggle to make the question mandatory.

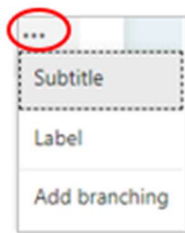
You can set levels up to 10 and choose either Star or Number for ratings.

A screenshot of the Microsoft Forms editor showing two examples of rating question configurations. The top example shows a rating question with 10 levels and a star symbol. The 'Levels' dropdown is set to '10' and the 'Symbol' dropdown is set to 'Star'. The bottom example shows a rating question with 10 levels and a number symbol. The 'Levels' dropdown is set to '10' and the 'Symbol' dropdown is set to 'Number'. In both examples, the dropdown arrows are circled in red. Above the top example, there are ten star icons, and below it, there are ten radio buttons numbered 1 through 10.

The respondent sees a rating question like this:

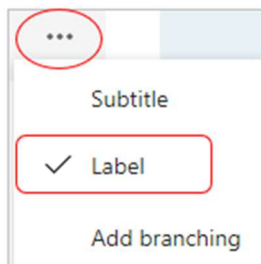
A screenshot of a rating question as seen by a respondent. The question text is '2. Please rate how much you like your job'. Below the text are five star icons.

In the ellipsis you can add a subtitle, a label or add branching.

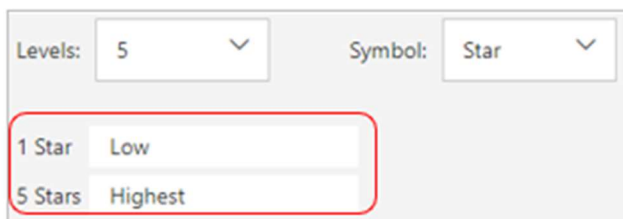


### Label

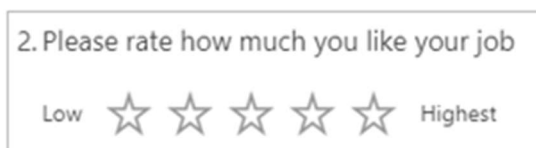
For a ratings question, you may want to let people know what the numbers or number of stars mean. For example, is 1 poor or excellent, is 5 average or maximum?



When you switch on Label, two label boxes appear for the lowest and highest numbers or number of stars. You can label the ratings however you feel is best.



For a rating question with labels, the respondent sees something like this:



### Add branching

For full details of how to use branching, go to pages 8-9.

## Date

Use this if you want your reply to be in date form.

Click onto Date

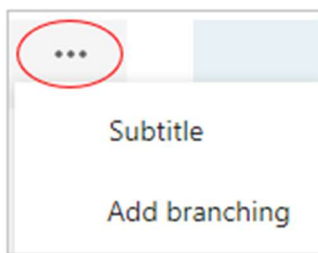


A date-format question will open for you to start setting up your form.

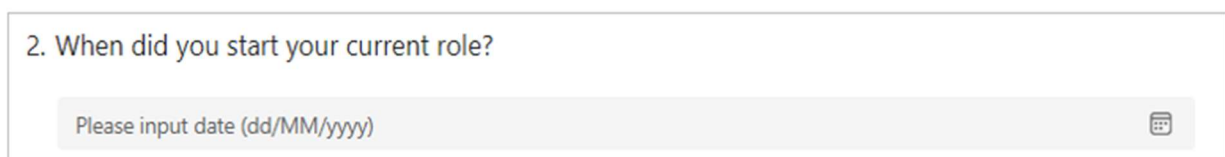


Again, you can use the Required toggle to make this mandatory.

In the ellipsis you can add a subtitle or add branching. See page 8-9 for full details of branching.

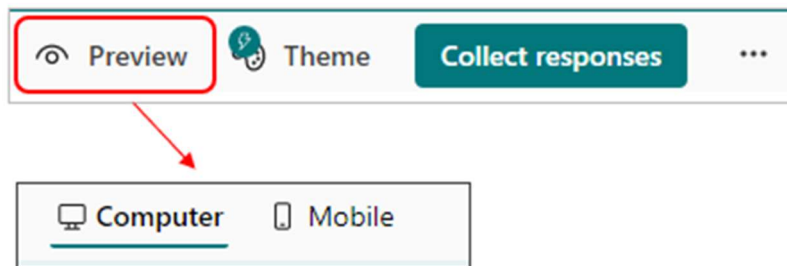


Respondents see a date question like this, with a calendar for them to select a date:

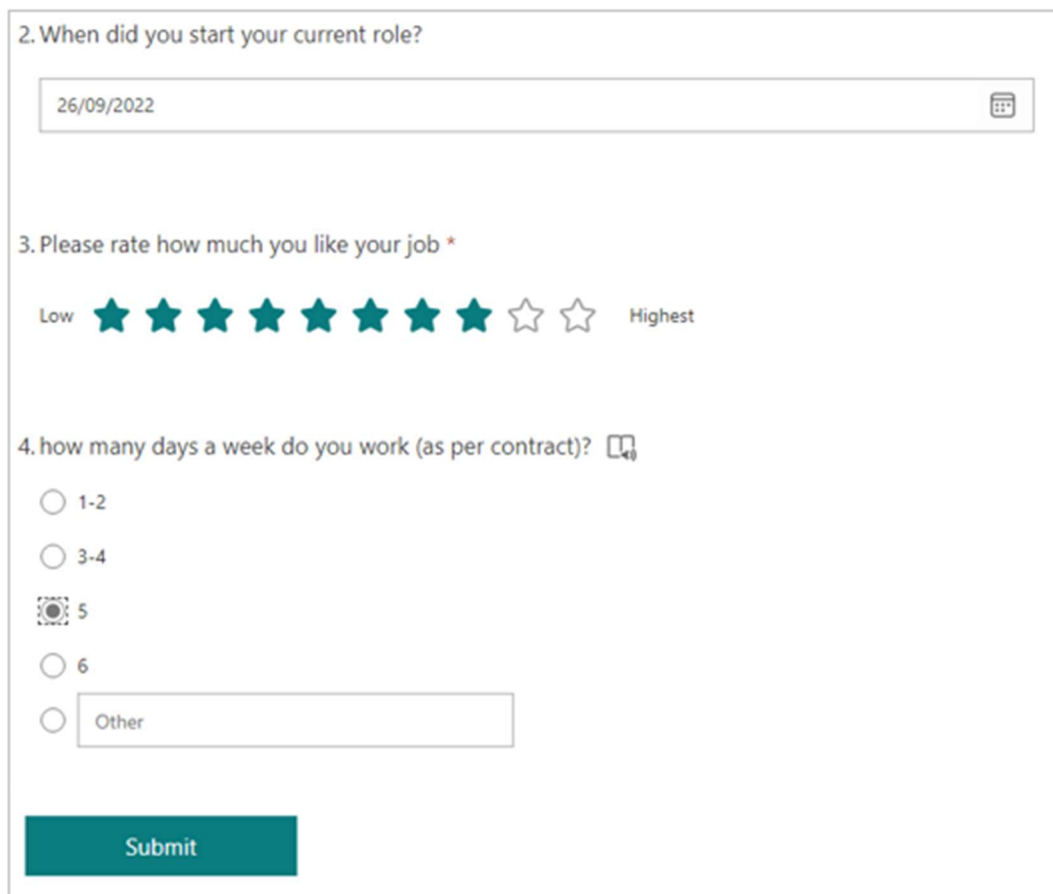


## Preview your form

1. Select Preview (top right) and choose 'computer' or 'mobile' to see how your form will look on either of those devices.



2. To test your form, answer the questions in Preview mode, and then select Submit. You will find your submission in Responses tab.

The image shows a preview of a Microsoft Form with three questions. Question 2 is 'When did you start your current role?' with a text input field containing '26/09/2022' and a calendar icon on the right. Question 3 is 'Please rate how much you like your job \*' with a star rating scale from 1 to 5. The first four stars are filled with teal, and the last two are empty. The scale is labeled 'Low' on the left and 'Highest' on the right. Question 4 is 'how many days a week do you work (as per contract)?' with radio button options for '1-2', '3-4', '5', '6', and 'Other'. The '5' option is selected. A teal 'Submit' button is at the bottom of the form.

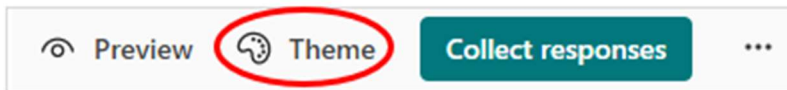
3. To keep editing your form, select 'Back.'

## Pictures and Videos

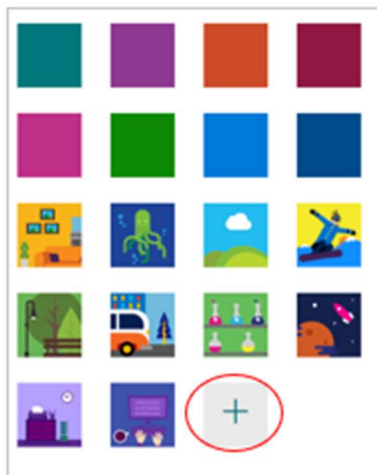
### Change your form theme

To give your survey or form some visual appeal, you can apply a theme, add your own background image, or customise the background colour.

1. From the options in top right of the Forms page, select 'Theme.'



2. A sidebar will open for you to choose a colour or background image.

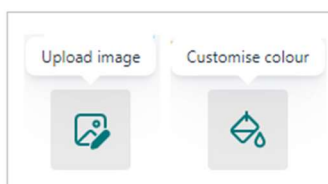


Because Microsoft apps are intuitive, depending on your form content and name you may be presented with 'Theme ideas' that the system thinks may help.

### Background image and colour

If you don't want any of the theme options offered, click onto the plus sign to customise a theme yourself.

You can upload a background image or customise the background colour.

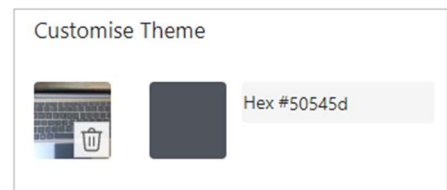




## Upload image

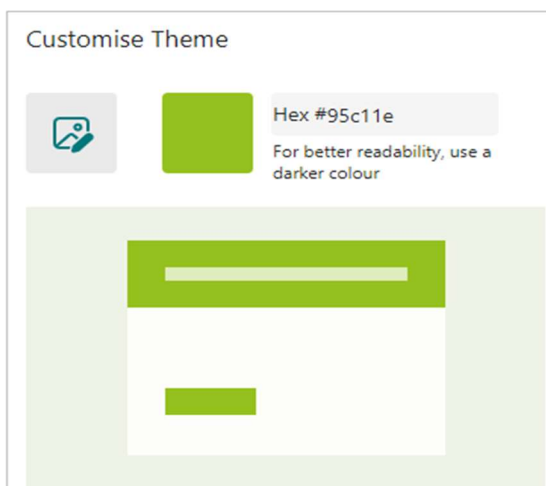
This will open for you to choose an image stored on your OneDrive or from your laptop/PC (via File Explorer area).

Once uploaded, you get the chance to delete it if you change your mind, using the bin icon.



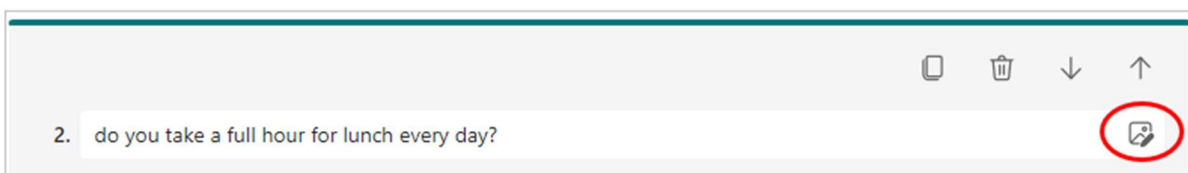
## Custom colour

To customise background colour you will need to add the Hex value of the colour you want to use. For reference, the Barnardo's corporate green is 95c11e.



## Add a picture to a question

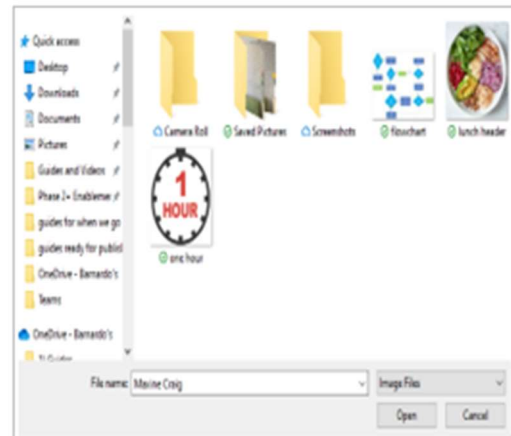
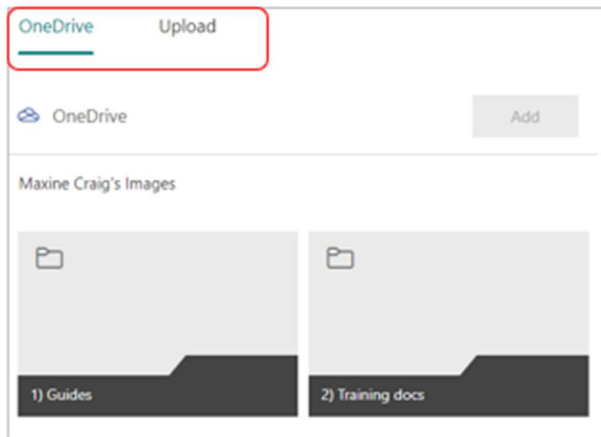
1. Select the question to which you want to add a picture.
2. Select 'Insert media' icon on the right side of the question.



3. In the Insert media pane that opens on the right, select 'Insert image.'



- Click on OneDrive to find a picture in any OneDrive folder, then Add. Or click on Upload to find an image on your computer/device (e.g. Pictures folder) and select Open.



- The image will appear to the right of your question.



### Change the size of your picture

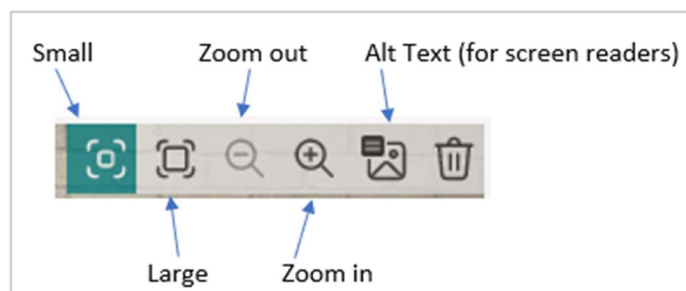
Once you add a picture to a question in form, you can adjust the size by making it larger, making it smaller, or zooming in to focus on one part of it.

You can also add alternative text to images for screen readers to narrate.



- Select the picture you want to edit next to a specific question.
- Select **Edit** (the pencil icon) to view the picture editing options.

- By default, the picture displays as Small (the icon on the very left). To enlarge it, select Large (second from left).



## Zoom in or out on a picture

To zoom in on a specific area of the picture, select Zoom In to adjust it, then click and drag or tap and drag to centre it where you want.

To zoom out, select Zoom Out , and then click and drag or tap and drag to centre it where you want.


## Add a video to a question


1. Select the question to which you want to add a video.
2. Select Insert Media on the right side of the question.

1. What is your favourite thing about working for Barnardo's? 


3. In the 'Insert Media' pane, select 'Insert Video.'
4. Enter the URL for the YouTube or Stream video you want to use, and then select Add.

Insert media

 Insert Image

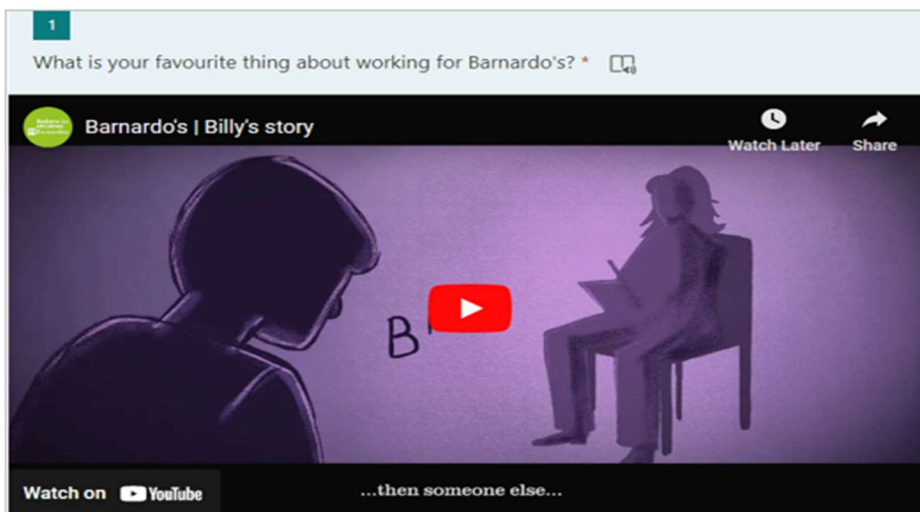
 Insert Video

Video URL

 URL

**Note:** You can only add videos hosted on YouTube or Microsoft Stream to a form question. You'll see an error message if you try to use a video that isn't hosted on Stream or YouTube.

5. Your video will appear under the question.

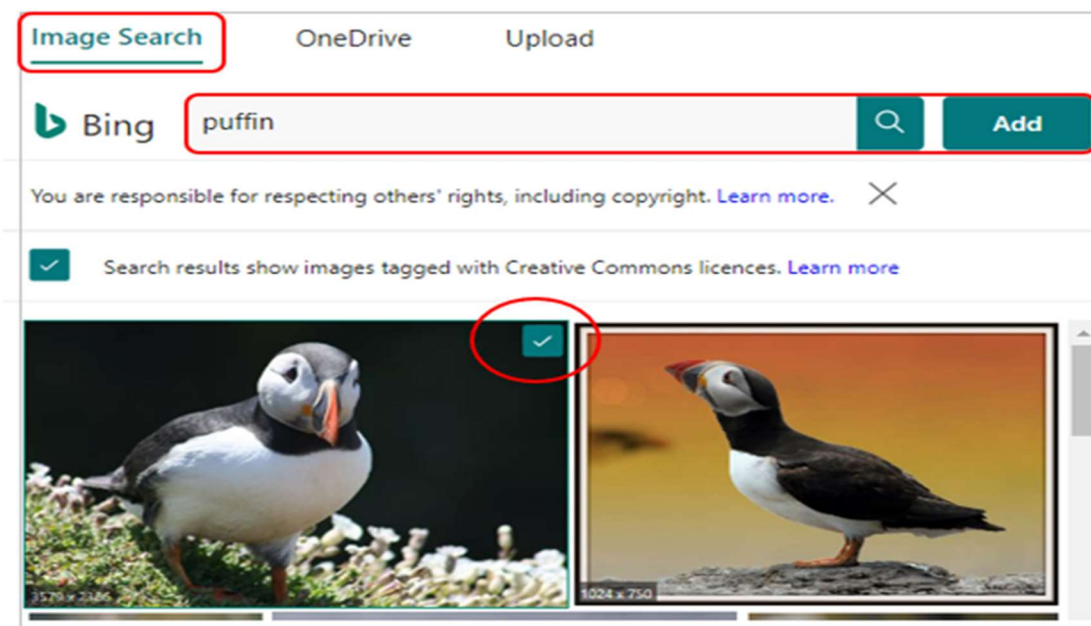


Add a picture or logo to your form header

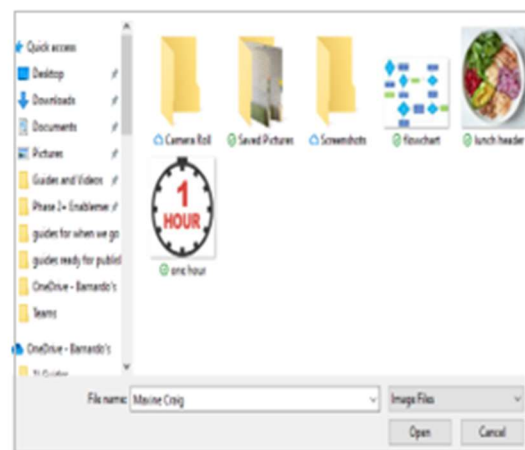
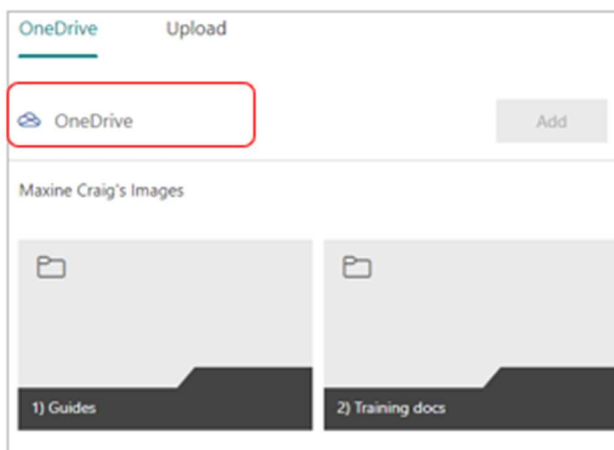
1. Select Insert Image icon on the right of the header.



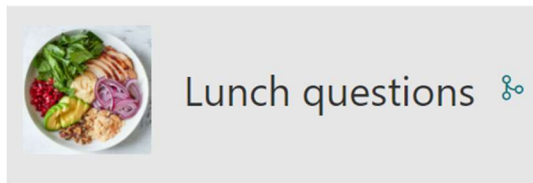
2. A pane will open to the right of the screen.
3. If you have the option for Bing image search, type into the search field what you want an image of. Click onto the one you want (to get a tick) and click Add.



4. Or click on OneDrive to find a picture in any OneDrive folder, then Add.
5. Or click on Upload to find an image on your device (e.g. Pictures folder) and select Open.



6. The image will appear in your form header to the left of the title.

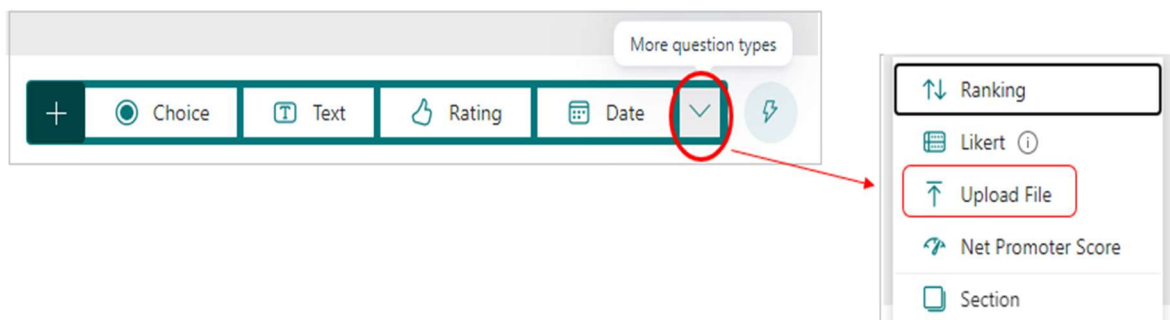


## Add questions that allow for file uploads

Some of your questions may require your respondents to attach a file(s) to their answers, such as if you were trying to gather information on any docking stations being used.

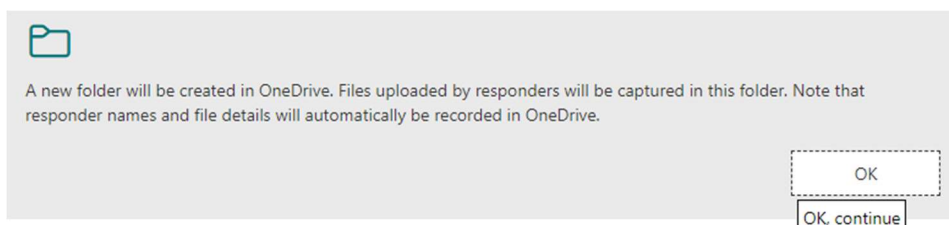
You can add a type of question that allows for file uploads.

1. Click on 'Add New' to start your question.
2. In the dropdown arrow called 'More question types,' select 'File upload.'

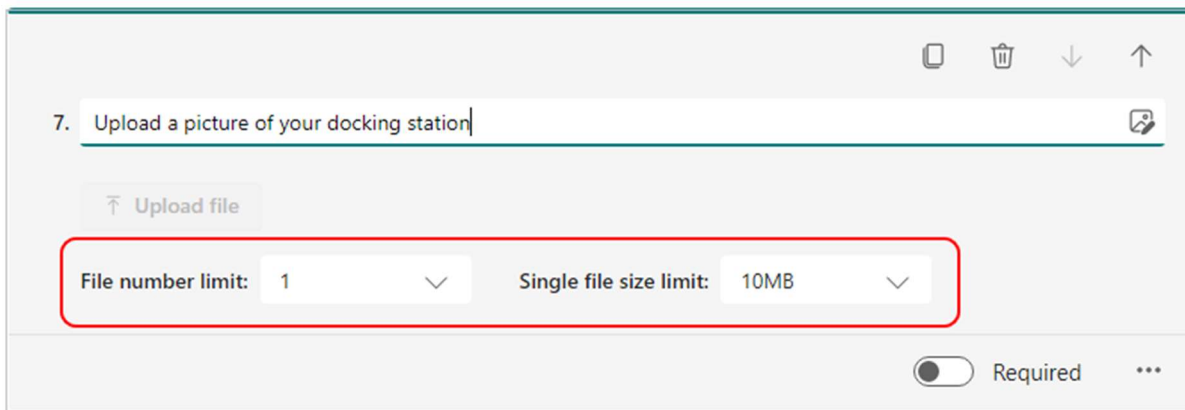


3. If this is the first time you have used this type of question, you may see the following message telling you that a new folder will be created in your OneDrive into which the uploaded files will go.

Select OK to continue.



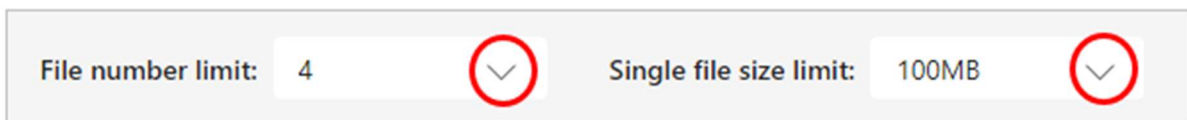
4. Enter the text you want to display for the question.



The screenshot shows a question editor interface. At the top, there is a text input field containing the question text: "7. Upload a picture of your docking station". Below the text field is an "Upload file" button. Underneath the button are two dropdown menus: "File number limit" set to "1" and "Single file size limit" set to "10MB". These two dropdowns are highlighted with a red rectangular box. At the bottom right, there is a "Required" toggle switch which is currently turned off, and a three-dot menu icon.

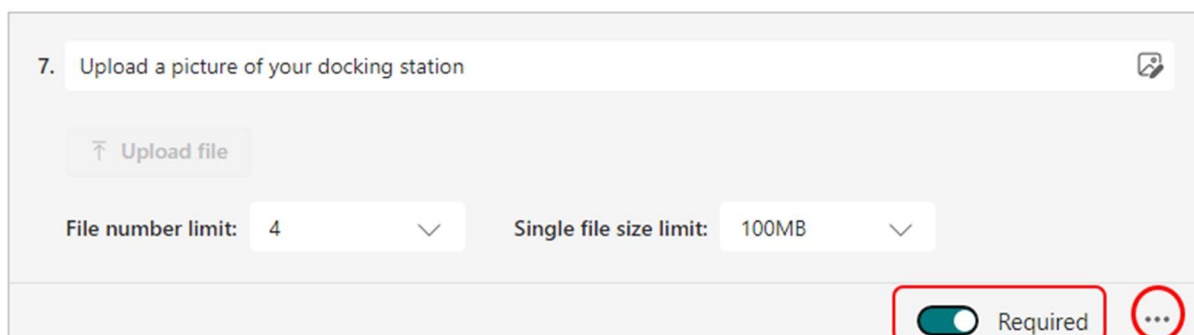
5. Select the 'File number limit' drop-down list to select the maximum number of files you'll allow to be uploaded to the question.

**Note:** A maximum of 10 files is allowed to be uploaded per question.



This is a close-up view of the two dropdown menus. The "File number limit" dropdown is set to "4" and the "Single file size limit" dropdown is set to "100MB". Red circles are drawn around the downward-pointing arrows of both dropdowns to indicate they should be clicked.

6. Select the 'Single file size limit' drop-down list to select the maximum file size (10MB, 100MB, or 1GB) you'll allow per question.
7. As with all questions, switch the 'Required' toggle to the right if you want this question to be mandatory.



This screenshot shows the question editor interface with the "Required" toggle switch turned on (indicated by a teal bar on the left of the switch). The "File number limit" dropdown is set to "4" and the "Single file size limit" dropdown is set to "100MB". A red rectangular box highlights the "Required" toggle and the three-dot menu icon to its right.

8. Use the ellipsis to select which file types you want respondents to be able to upload.

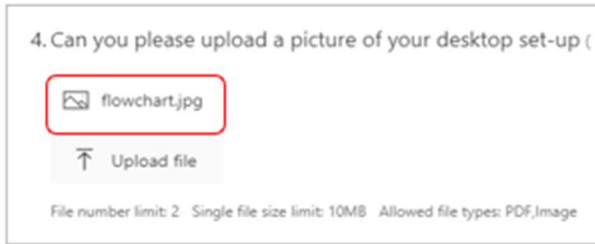
9. Use the tick boxes to choose from Word, Excel, PPT (PowerPoint), PDF, Image, Video and Audio. (See Notes below for full details)

File Name	File formats accepted
Word	.doc, .dot, .wbk, .docx, .docm, .dotx, .dotm, .docb
Excel	.xls, .xlt, .xlm, .xlsx, .xlsm, .xltx, .xltx
PPT (PowerPoint)	.ppt, .pot, .pps, .pptx, .pptm, .potx, .potm, .ppam, .ppsx, .ppsm, .sldx, .sldm
Image	.jpg, .jpeg, .png, .gif, .bmp, .tiff, .psd, .thm, .yuv, .ai, .drw, .eps, .ps, .svg, .3dm, .max
Video	.avi, .mp4, .mov, .wmv, .asf, .3g2, .3gp, .asx, .flv, .mpg, .rm, .swf, .vob
Audio	.mp3, .aif, .iff, .m3u, .m4a, .mid, .mpa, .ra, .wav, .wma

10. Select 'Preview' to see how your question will appear to your respondents.

11. On Preview, the 'Upload file' button will be active and ready for respondents to interact with, and they are also informed of permitted file number, type and size.

12. When respondents successfully upload files, they'll see their file(s) represented in their answer, as with the flowchart jpg below:



Find and review the files uploaded for your question

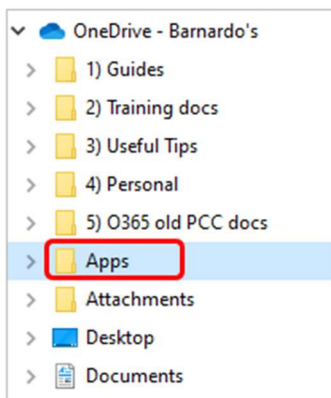
When respondents upload files for your form question, those files are automatically stored in your OneDrive 'Apps' folder.

You can find the uploaded files in three ways:

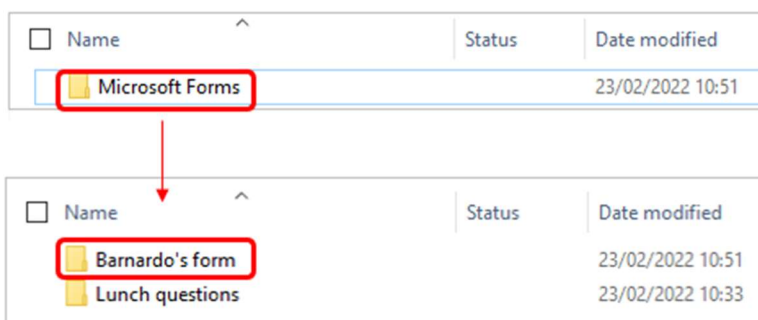
- A. OneDrive desktop app
- B. OneDrive online app
- C. Response tab on your form in Forms app

**A. Using OneDrive desktop:**

1. Go to OneDrive in your File Explorer and then choose the 'Apps' folder.

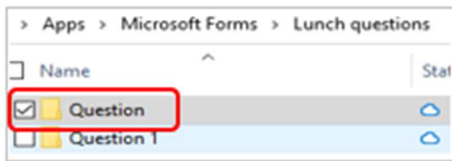


2. Select the 'Microsoft Forms' sub-folder (this may be the only folder in Apps), then select the file folder matching the name of your form.

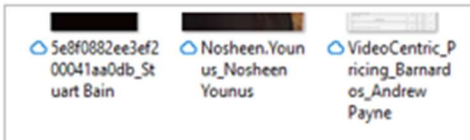




3. Select the folder of the question that has the uploaded files.



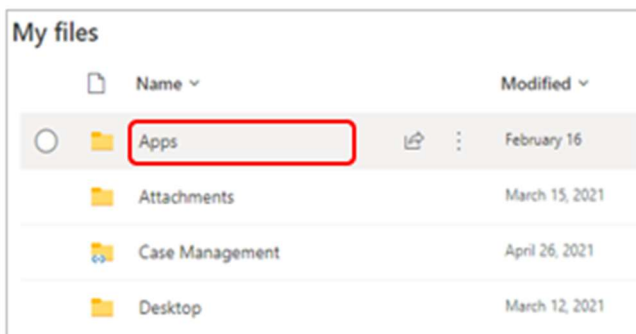
4. You'll see the files that respondents have uploaded to that question. The files come through with the name of the file and of the person who uploaded it.



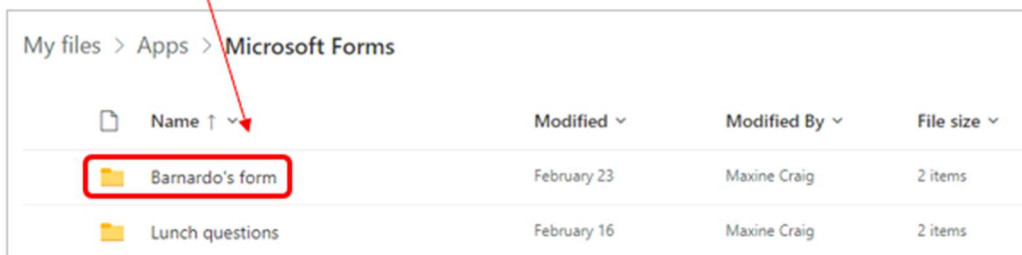
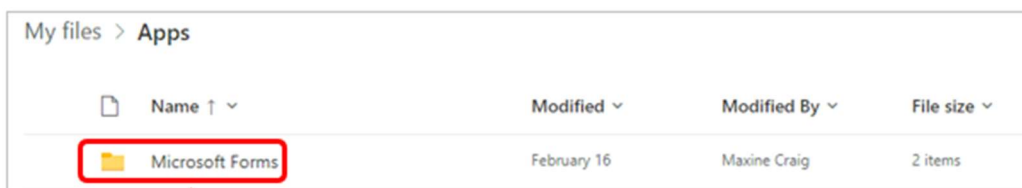
**Note:** the name of the file is dependent on what it was previously stored as!

**B. Using OneDrive online:** logged into [www.office.com](http://www.office.com)

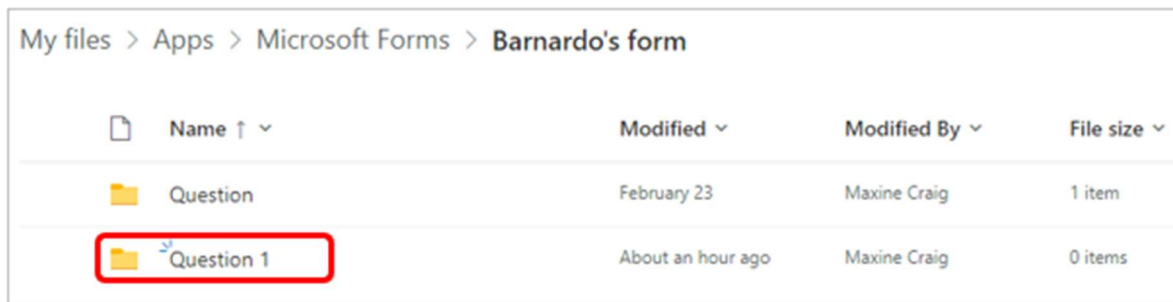
1. Select the Apps folder in My Files



2. Select the 'Microsoft Forms' sub-folder, then select the file folder matching the name of your form.

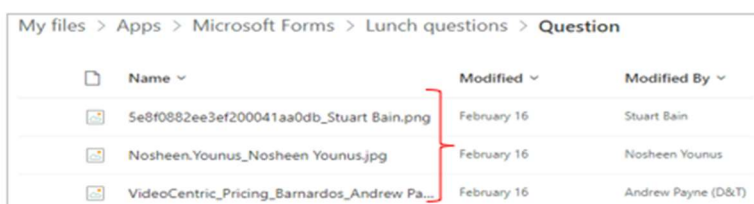


3. Select the folder of the question that has requested the uploaded files.



Name ↑	Modified	Modified By	File size
Question	February 23	Maxine Craig	1 item
<b>Question 1</b>	About an hour ago	Maxine Craig	0 items

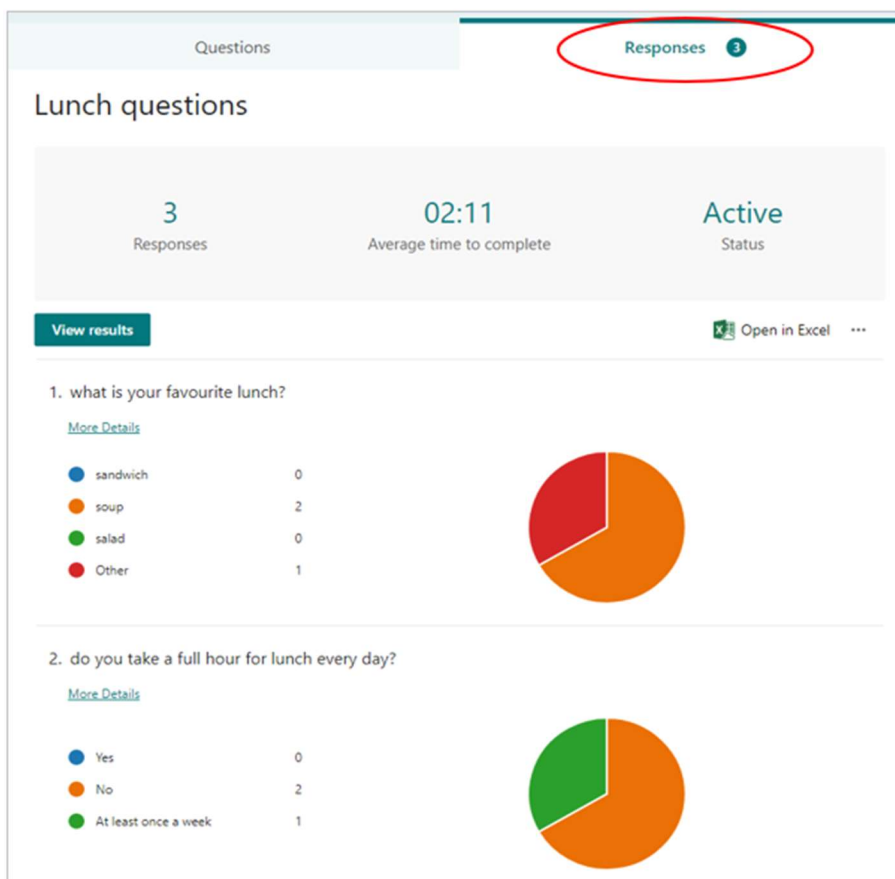
4. You'll see the files that respondents have uploaded to that question.



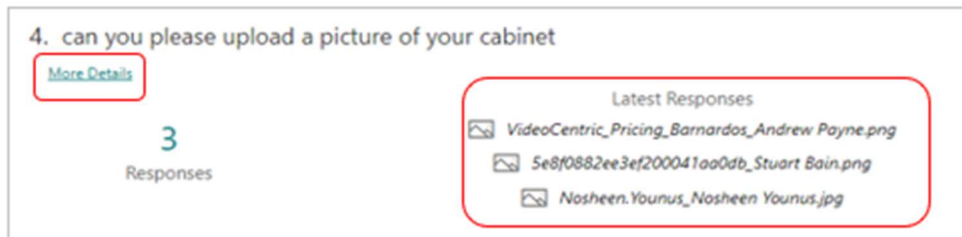
Name	Modified	Modified By
5e8f0882ee3ef200041aa0db_Stuart Bain.png	February 16	Stuart Bain
Nosheen.Younus_Nosheen Younus.jpg	February 16	Nosheen Younus
VideoCentric_Pricing_Barnardos_Andrew Pa...	February 16	Andrew Payne (D&T)

### C. Using the Responses tab:




1. Click onto the Responses tab of your form. You will see the response info for all your questions.



- Go to the question for which you requested uploading files. You will see how many responses there have so far been:



- Click onto the 'More Details' link underneath the question.
- This will open that question with the files as links in the Responses column.

3 Total responses			View in folder
ID ↑	Name	Responses	
1	Nosheen Younus	 <a href="#">Nosheen.Younus_Nosheen Younus.jpg</a>	
2	Stuart Bain	 <a href="#">5e8f0882ee3ef200041aa0db_Stuart Bain.png</a>	
3	Andrew Payne	 <a href="#">VideoCentric_Pricing_Barnardos_Andrew Payne.png</a>	

- You then have the option to:

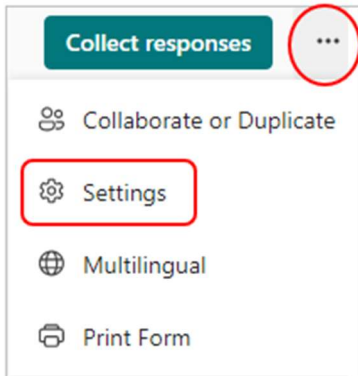
- click on each individual file to open it in a new web browser tab, or
- click onto 'View in Folder' button to see them in the relevant OneDrive folder.

**Note:** when you use the 'View in Folder' button, the folder will open in the **web version** of OneDrive on a new browser tab.

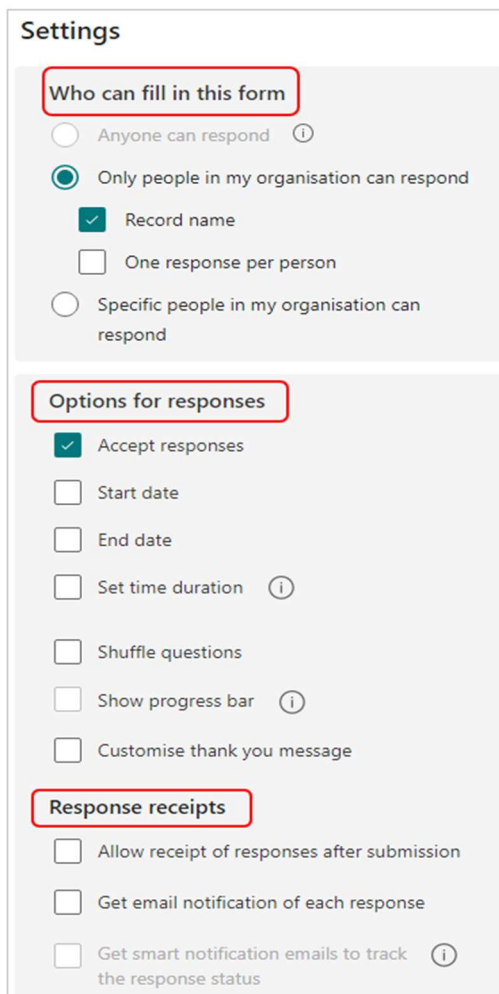
## Settings for forms

You can use settings to specify deadlines, identify form respondents, and set other preferences.

To reach Settings, click on the ellipsis (3 dots) in top right of your form.



You will then see the settings options such as who can fill in the form, whether you record their name, adding a start and end date, an option to shuffle the questions, a thank you message and response receipts.

A screenshot of the 'Settings' page in Microsoft Forms. The page has a light grey background and is titled 'Settings' at the top left. It is divided into three sections, each with a red box around its title: 1. 'Who can fill in this form': Contains radio buttons for 'Anyone can respond', 'Only people in my organisation can respond' (selected), and 'Specific people in my organisation can respond'. There are also checkboxes for 'Record name' (checked) and 'One response per person'. 2. 'Options for responses': Contains checkboxes for 'Accept responses' (checked), 'Start date', 'End date', 'Set time duration', 'Shuffle questions', 'Show progress bar', and 'Customise thank you message'. 3. 'Response receipts': Contains checkboxes for 'Allow receipt of responses after submission', 'Get email notification of each response', and 'Get smart notification emails to track the response status'. Information icons (i) are present next to several options.

## Who can fill out this form

- ❖ Anyone can respond = anyone inside or outside of Barnardo's can submit responses to your form.

***Important:*** if you select this option, **names of respondents are NOT recorded.**

- ❖ Only people in my organisation can respond = only people that work for Barnardo's will be able to respond to your form.

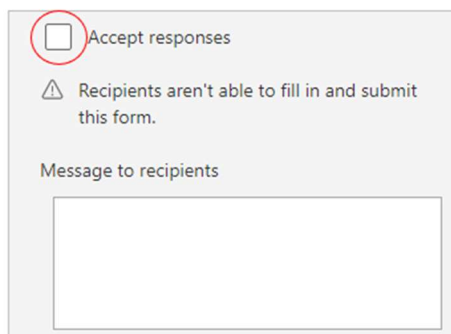
- Record name - Keep track of people that have responded.
- One response per person - Limit responses to only one per person. This will prevent individuals from filling out a form multiple times.

- ❖ Specific people in my organisation can respond = only people or groups at Barnardo's that you specify here can respond to your form.

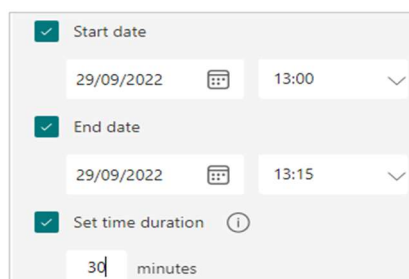
- Record name - Keep track of people that have responded.
- One response per person - Limit responses to only one per person. This will prevent individuals from filling out a form multiple times.

## Options for responses

- **Accept responses** - If this setting is unticked, you turn off the ability to collect any additional form responses. If you turn this off, you can also customise the default message that respondents see when trying to submit their response.



- **Start date and End date** - You can specify an exact date and time when you want to start and stop collecting form responses. You can also set a time duration during which respondents can fill in the form. Their answers are auto submitted when the timer is up.



Click Start date, then click the date text box and select a date from the calendar control. Select a specific hour from the drop-down list of hour increments. Do the same for End date.

- **Shuffle questions** - When this is unticked (default setting), questions are displayed to respondents in the same order you created them.

When this option is ticked, the order of questions displayed will be randomly shuffled. Each respondent sees the questions in a different sequence.

- All questions - Shuffles the order of all questions in the form.
- Lock questions - Shuffles the order of all questions except for those you designate (e.g. questions 1-4).

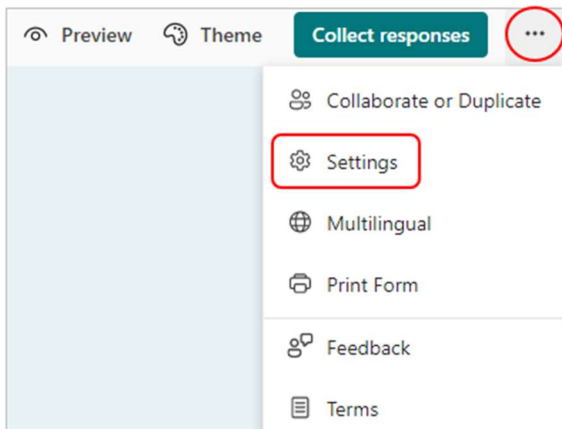
- **Show progress bar** - Respondents will see a visual indicator of their progress while completing a form.
- **Customise thank you message** – lets you display a thank-you note upon completion of your form. Click in the text box to create a customised message.

## Response Receipts

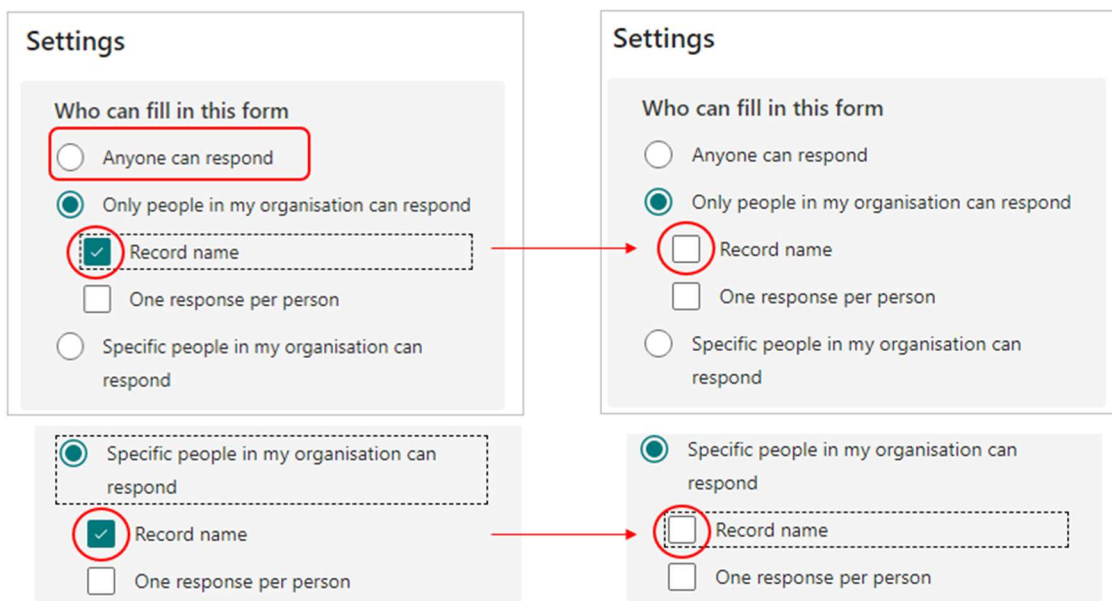
- **Allow receipt of responses after submission** - After completing the form, respondents will have the option to save or print a PDF of the form with their answers on the “Thank You” page. Selecting this setting still allows internal respondents to ask for an email receipt of their form.
- **Get email notification of each response** - Get notified by email each time a response is submitted.

## Set up your form to not record names

To make your form anonymous, open the settings which you can find within the ellipsis in top right of your Forms screen.



In the settings, under 'Who can fill out this form,' select one of the following:



- ❖ Anyone can respond (because this option will NOT record names)
- ❖ Only people in my organisation can respond
  - ✓ But make sure you untick the 'Record Name' box so names aren't recorded with responses.
- ❖ Specific people in my organisation can respond
  - ✓ But make sure you untick the 'Record Name' box so names aren't recorded with responses.

## Can people still be identified?

When you create your form and untick the 'Record name' setting, you want to collect responses that don't contain any personally identifiable information from your respondents.

However, there are still ways in which people could be unintentionally identified.

Here are a couple of examples of different scenarios that could go against your intention of not recording identifiable information, even with the 'Record name' setting unticked.

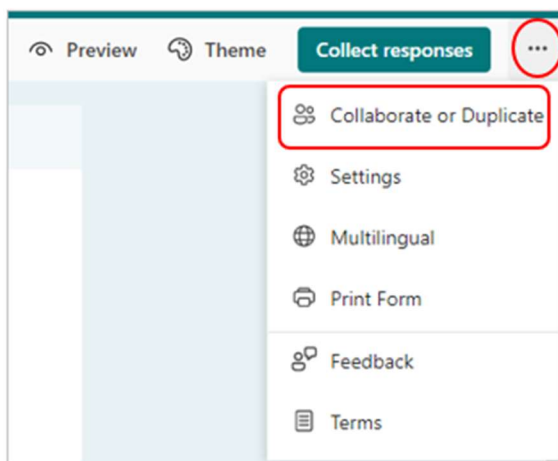
- If a question(s) asks for personally identifiable information (such as a name) and your respondents provide it, names will be recorded.
- If you send out your form to only a few specific people, you might be able to match them with their responses depending on what questions are asked and how they're answered.

## Share a form with co-authors to collaborate

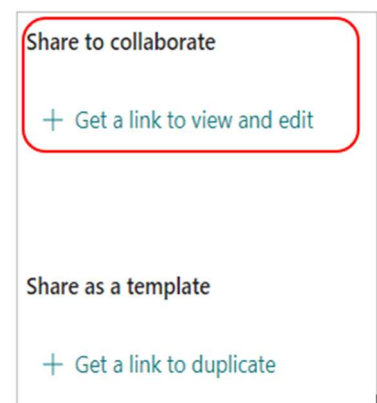
When you invite others to collaborate on your form, your co-authors can help add content, analyse responses and share your form with others.

**Note:** if you are part of an MS365 group for Teams or SharePoint, you can set up group forms – see page 25 for how.

1. Select the ellipsis in top right of your form screen and choose 'Collaborate or Duplicate.'

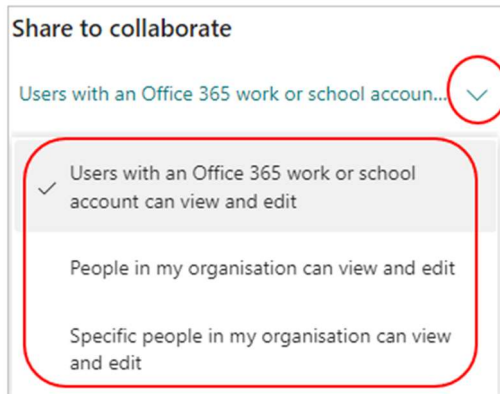


2. Under 'Share to collaborate,' select 'Get a link to view and edit' to invite others to add and edit questions, view responses and share with others.





- Using the dropdown arrow, select one of the collaboration permission options to assign co-authoring rights to view and edit.



- **Users with an Office 365 work or school account can view and edit** - Anyone with an Office 365 work or school account, inside or outside of Barnardo's.
- **People in my organisation can view and edit** - Anyone in Barnardo's.
- **Specific people in my organisation can view and edit** - Only people or groups in Barnardo's that you name here.

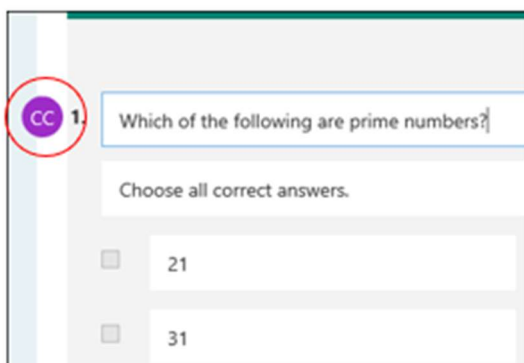
**Note:** You can designate up to 100 co-authors on a single form. A group counts as one co-author.

- Select Copy. You can now paste this link wherever your co-authors can access it, such as in an email or Teams chat.

**Note:** Anyone you've specified as a co-author that has access to the collaborate link of your form will be able to view and edit both questions and response data.

When you share a form to collaborate, you still remain the owner and it remains in your Forms portal, but your co-authors can view and edit it through the link you shared with them. At the top of the form, you can see the initials of each person currently making edits.

You'll also see display icons with initials of people or groups next to each section currently being edited.

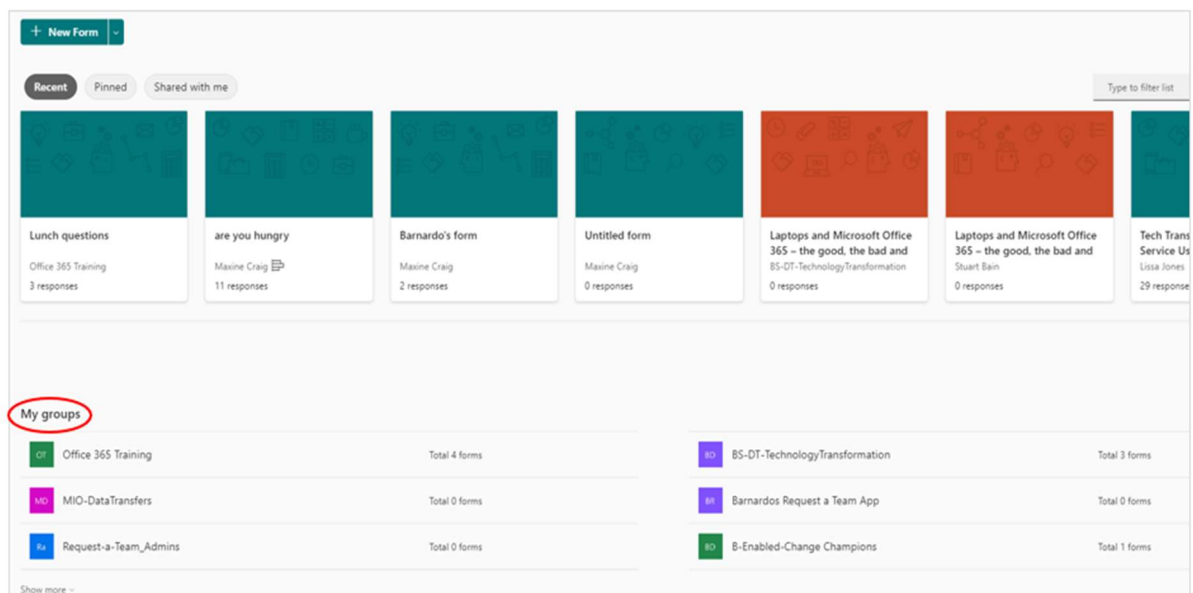


## Group forms

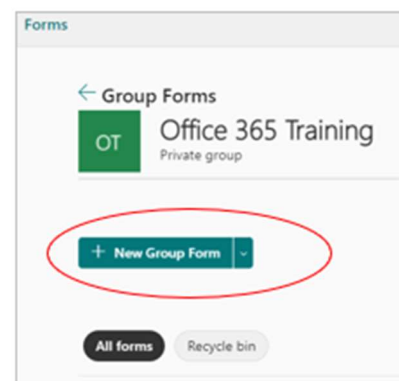
If you are part of a Microsoft 365 group (e.g. a member/owner of a team on Teams or part of a SharePoint site) you can set up what is called a group form that can be accessed and managed by all members of that group.

You can also transfer a form you have already created.

1. On Forms landing page, scroll down to the 'My Groups' section.



2. Select the group for which you want to create a new form.
3. Select 'New Group Form.'
4. Then follow the normal processes to create your form.



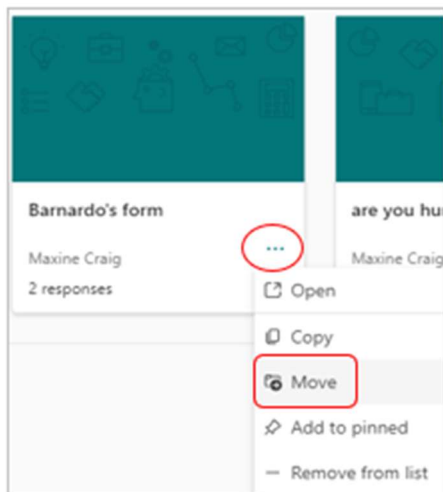
Your group colleagues can now access the form which will have its responses stored in the SharePoint site of the group, the ability to share the form in your group's Team channel, etc.

## Move a form to a group

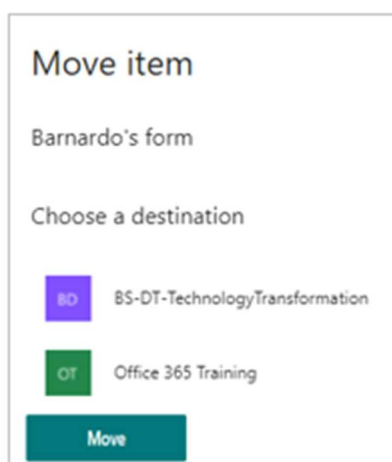
If you've already created a survey or poll and are the only owner, you can move it to a group so everyone in that group becomes an owner of the form.

Group co-authors can help add content, analyse responses, and share the form with others.

1. Click on the ellipsis of the form and choose 'Move.'



2. A sidebar will open for you to choose which group/team you want to move the form into. Click on the Move button.



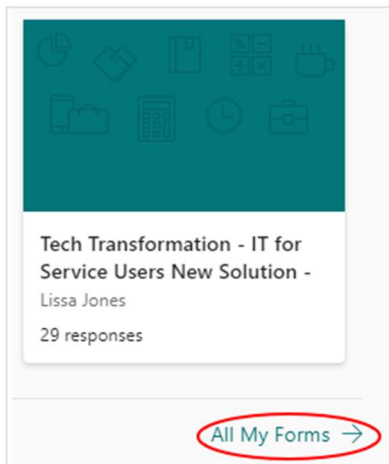
3. To see the form in the group, scroll down to the bottom of your Forms home page to see 'My groups.' This list shows all the groups you belong to and the forms owned within those groups.

Your newly moved form will inherit all the features of a group form, such as its responses being stored on the group SharePoint site.

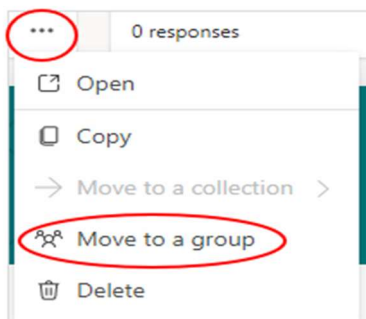
- Under the name of the form title, a new Excel workbook will be created in the Documents folder of the SharePoint site page and include all previously captured responses. Any new responses will be synchronised to this new Excel workbook.

**Important:** Don't move the Excel workbook to another location. New responses coming in won't sync with an Excel workbook that has been moved.

- To see all of your forms, select 'All My Forms.'



- You can also move a form to a group from this page. On the form you want to move, select the ellipsis in the bottom right corner and then choose 'Move to a group.'



- On the sidebar, choose the group you want to move your form to, and then select Move.

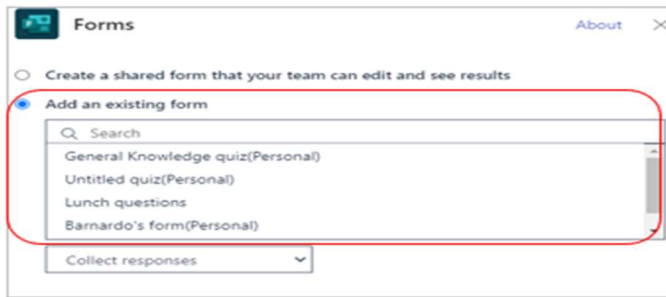
## FAQs for group forms

### Will the link to your original form work after it has been moved to a group?

Yes, the link pointing to the original form will still work after the form has been moved to a group. The answer of a respondent who uses an old link (to the original form) will be captured in the Excel workbook stored on the group SharePoint in Microsoft 365 page.

### How do you share a form in your group's Teams channel?

After you've moved the form to a group, you can add the form as a tab along the top. Use the 'Add an existing form' option and choose the name of the form you want to share.



Note: the forms you have not moved to a group will have (Personal) after the name.

### Can you perform the reverse and transfer ownership of a group form to yourself?

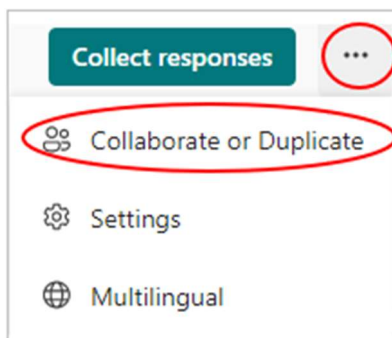
The ownership of a form can be transferred from an individual to a group, but not the other way around.

### How do you download responses to an Excel file when you have transferred ownership of your form to a group?

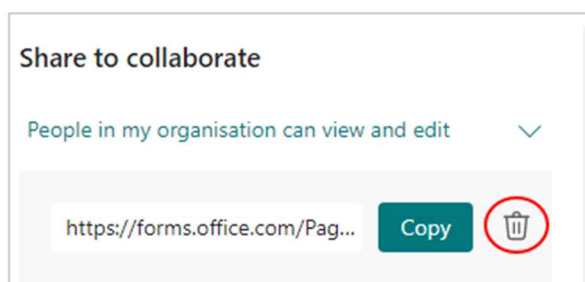
When you click on “Open in Excel” in the Responses tab, a workbook with your responses will open in Excel Online. You can also find this Excel workbook in the Document folder of your group’s SharePoint site.

### Stop sharing a form

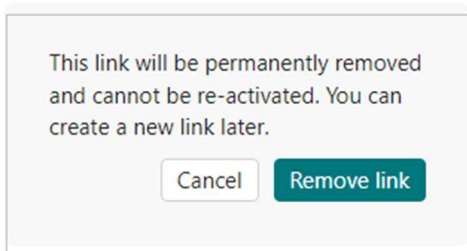
1. Select the ellipsis in top right of the form
2. Choose ‘collaborate or duplicate’



3. Select the bin icon button next to the text box that displays the form link.



4. Select 'Remove link' to permanently remove the Collaborate link. Select Cancel if you change your mind and don't want to remove the Collaborate link.



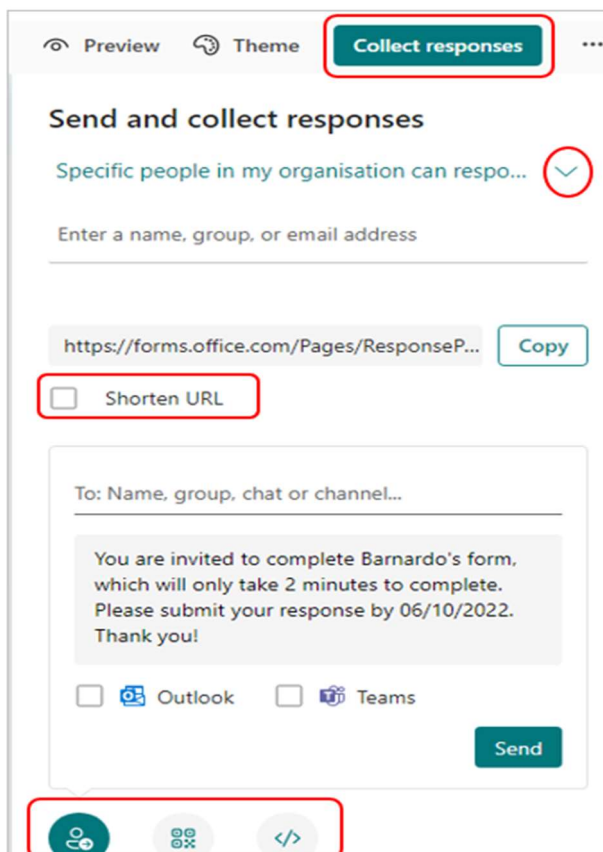
5. Once you've removed the Collaborate link, it's unusable for anyone that tries to click or tap on it. You can't recreate the same Collaborate link and will need to get a new, unique one to share with others.

## Send a form to collect responses

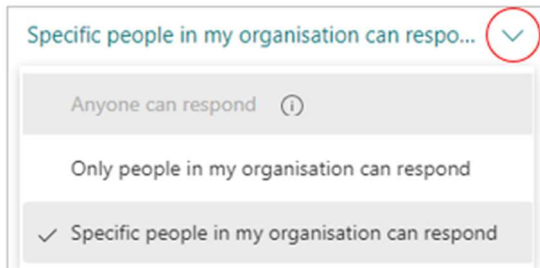
With Microsoft Forms, you can send your form to people and collect their responses in a few different ways, depending upon your needs.

You can choose to send it as an invitation via Outlook or Teams, or embed it as a webpage or document, or create a QR code to send out.

1. Open the form for which you want to collect responses.
2. Select the 'Collect responses' button to access the 'Send and collect responses' section.

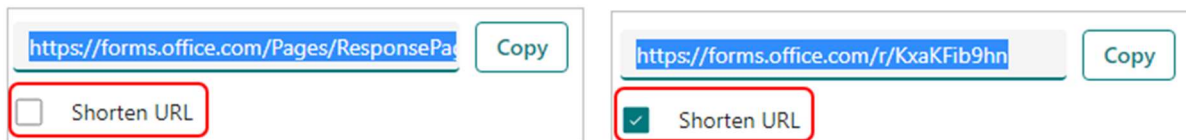


3. Select the drop-down list and choose from whom you want to collect responses. *Note that the 'Anyone can respond' option is greyed out at Barnardo's.*



- ❖ **Anyone can respond** - Anyone inside or outside of Barnardo's can submit responses to your form. But policy is that this is 'off' at Barnardo's.
- ❖ **Only people in my organisation can respond** - Only people signed in with a Barnardo's account can submit responses to your form.
- ❖ **Specific people in my organisation can respond** - Only people or groups at Barnardo's that you specify here can respond to your form.

4. Tick the 'Shorten URL' box if you want a shorter URL than that provided.

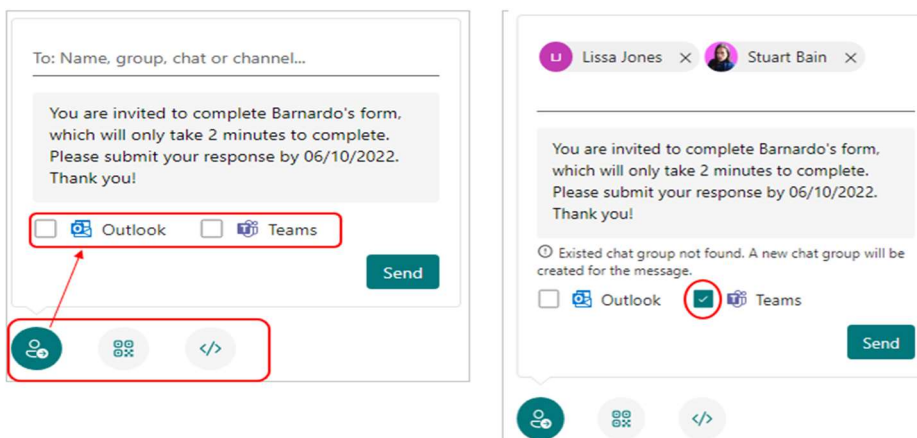


5. Choose how you want to ask for responses. Choose either Invitation by Outlook or Teams, QR code or Embed.

**A) Invitation** - input the names, group, chat or channel of those you want to complete the form/poll.

Tick Outlook or Teams - if you choose Teams, a chat will be created if none exists for those people.

6. Press Send.



**Tip:** Anyone who receives the form link through email will be able to forward your email to other people who can potentially complete your form. However, if your form is set to 'Only people in my organisation can respond' or 'Specific people in my organisation can respond,' that means only those people can view and respond to your form (regardless of whether the email has been forwarded to them).

**Note:** If you have selected 'Specific people in my organisation can respond,' those names will pre-populate in the "Bcc" line of your email as long as your respondent list is fewer than 1,200 characters long. Modify your email as needed before sending, e.g. move them into the To field in needed.

**B) QR code:** select the QR code button, then click or tap the Download button which will download your QR code as a .png file. Insert the .png where your intended audience can scan it with a QR code scanner, e.g. mobile, to access your form.



**C) Embed:** select the Embed button, and then click or tap Copy. Paste this embed code into a web page or a document.



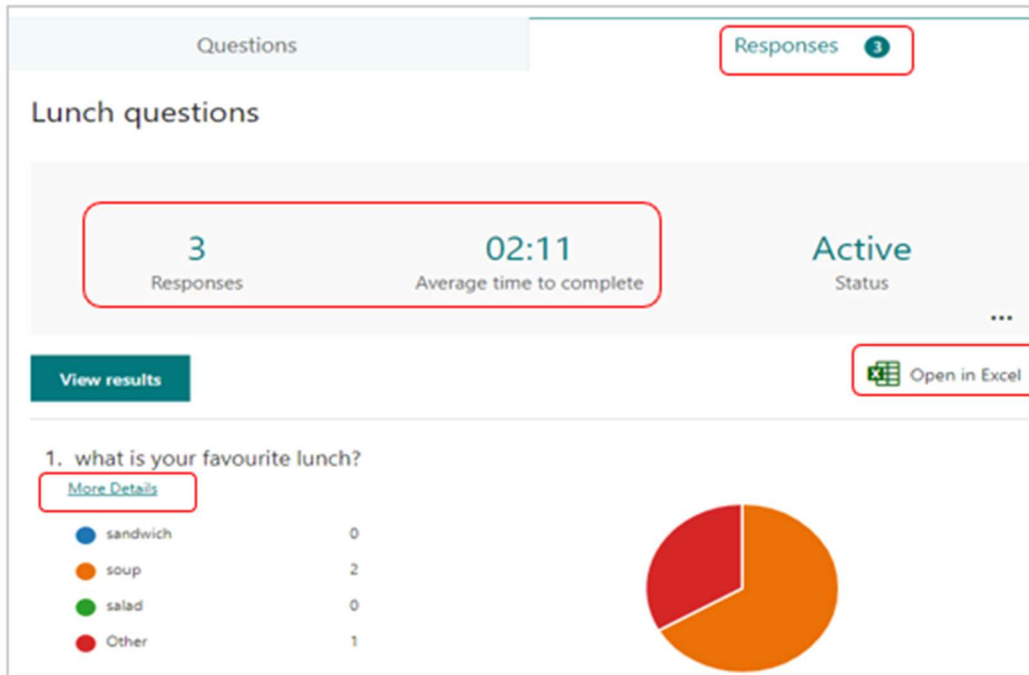


## Check and share your form results

Microsoft Forms includes real-time analysis that provide response summary information and individual results for forms. You can export the results to Excel for more in-depth analysis, as well as delete or print a summary of responses.

### View response summary information for your form

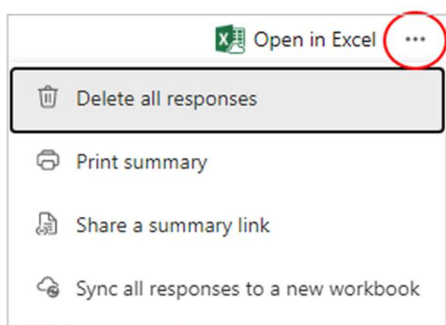
Open the form for which you want to review the results, and then select the 'Responses' tab.



Across the top you'll see real-time summary information data about your form - number of responses and average time it took for respondents to complete your form.

Next to each question, you'll see the number of responses and a pie chart that shows a breakdown of responses.

In Responses, select the ellipsis to delete all responses, print a summary of responses or create a summary link to share.



## View details for each question

Select the 'More Details' link under individual questions.

The image shows a poll question: "1. what is your favourite lunch?". Below the question are two options: "sandwich" with 0 votes and "soup" with 2 votes. A red circle highlights the "More Details" link. An arrow points from this link to a table of 3 responses.

ID ↑	Name	Responses
1	Nosheen Younus	soup
2	Stuart Bain	Rice
3	Andrew Payne	soup

**Tip:** you can click on the column headers to sort the response results.

## Check response data for each question

Select 'View results' to see individual details for each respondent.

The image shows the 'View results' interface. On the left, it displays "3 Responses" and "Average time to complete 02:11". A "View results" button is visible. On the right, a "View results" panel shows a respondent ID of 1, the name "Nosheen Younus", and a completion time of "01:57". Navigation arrows are present on either side of the respondent information.

Use the left and right arrows to toggle through the result details of other responses. You can also click onto the name field to access all respondents' names and jump to the results of a specific respondent.

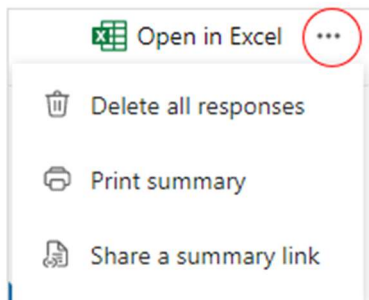
**Note:** If you have more than 50 respondents, scroll down to the bottom of the drop-down list and select 'Show more respondents' to see remaining responses.

You can also search for an individual response by entering the number (e.g. 25) in the Respondent field that is associated with that response.

The image shows a dropdown menu for the "Respondent" field. The number "25" is entered in the search box. The dropdown list shows "Anonymous" at the top, followed by "Respondent 21 Anonymous", "Respondent 22 Anonymous", "Respondent 23 Anonymous", "Respondent 24 Anonymous", and "Respondent 25 Anonymous". A hand cursor is pointing at the "Respondent 25" option.

**Tip:** Searching for an individual response by the ID number associated with it is especially helpful when responses are collected anonymously. The respondent ID is exclusive for each response, which can be found in the first column of your workbook if you export your responses and open them in Excel.

In Responses, select the ellipsis to delete all responses, print a summary of responses or create a summary link to share.



### View form results in an Excel workbook

You can easily view all of the response data for your form in Excel. Select 'Open in Excel' on the Responses tab to capture a snapshot of your current response data in a workbook.



#### **Notes:**

*If you've created your form in Excel for the web, your Excel workbook is automatically stored in OneDrive and contains a live data connection to your form. Any new response data in your form will be reflected in your workbook.*

*If you've created your form in OneDrive, your Excel workbook is automatically stored in OneDrive and contains a live data connection to your form. Any new response data in your form will be reflected in your workbook.*

*If you've created your form in Microsoft Forms, an offline Excel workbook will open that has no connection to your form.*

#### **Troubleshoot exporting data**

If you're experiencing a download error, learn how to [troubleshoot exporting form data to Excel](#).

## Analyse form results in Excel

In your Excel workbook, details of each question in your form are represented in columns and each response is shown in a row.

The first five columns display respondent ID, start and completion times for each response, and the name and email address of each respondent (obviously not if your form allowed anonymous replies).

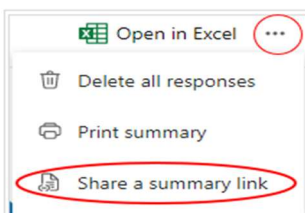
The subsequent columns display the respondents' selections to your questions.

ID	Start time	Completion time	Email	Name	what is your favourite	do you take a full holiday	how many days a week
1	2/16/22 14:03:55	2/16/22 14:05:51	nosheen.younus@barn	Nosheen Younus	soup	No	1-2
2	2/16/22 14:05:40	2/16/22 14:08:18	stuart.bain@barnardos	Stuart Bain	Rice	No	1-2
3	2/16/22 14:24:12	2/16/22 14:26:12	andrew.payne@barnar	Andrew Payne	soup	At least once a week	1-2

**Note:** Any changes you make to your workbook won't change the content of your form.

## Share results with others

Select the Responses tab. In the ellipsis, choose 'Share a summary link.'



Select the Copy button next to your link.



When you paste this link, anyone that has the link will be able to view a summary of responses for your form.

If you're collaborating on a form with 'specific people in your organisation,' only you as the form owner can create a summary link for your form. Co-authors can still copy and share your summary link but can't create one themselves. In the other collaboration modes, co-authors can create new summary links.

**Note:** if you share your form responses using 'anyone in your organisation,' and then decide to share with only specific people, any summary sharing link that already exists can still be accessed by anyone inside or outside of your organisation. You can delete an existing summary link to disable it, which will reduce access to the response data. You can then create a new summary link if you want to share it with a new audience, but this new summary link will still be accessible by anyone who gets a hold of it.