

Forms 101

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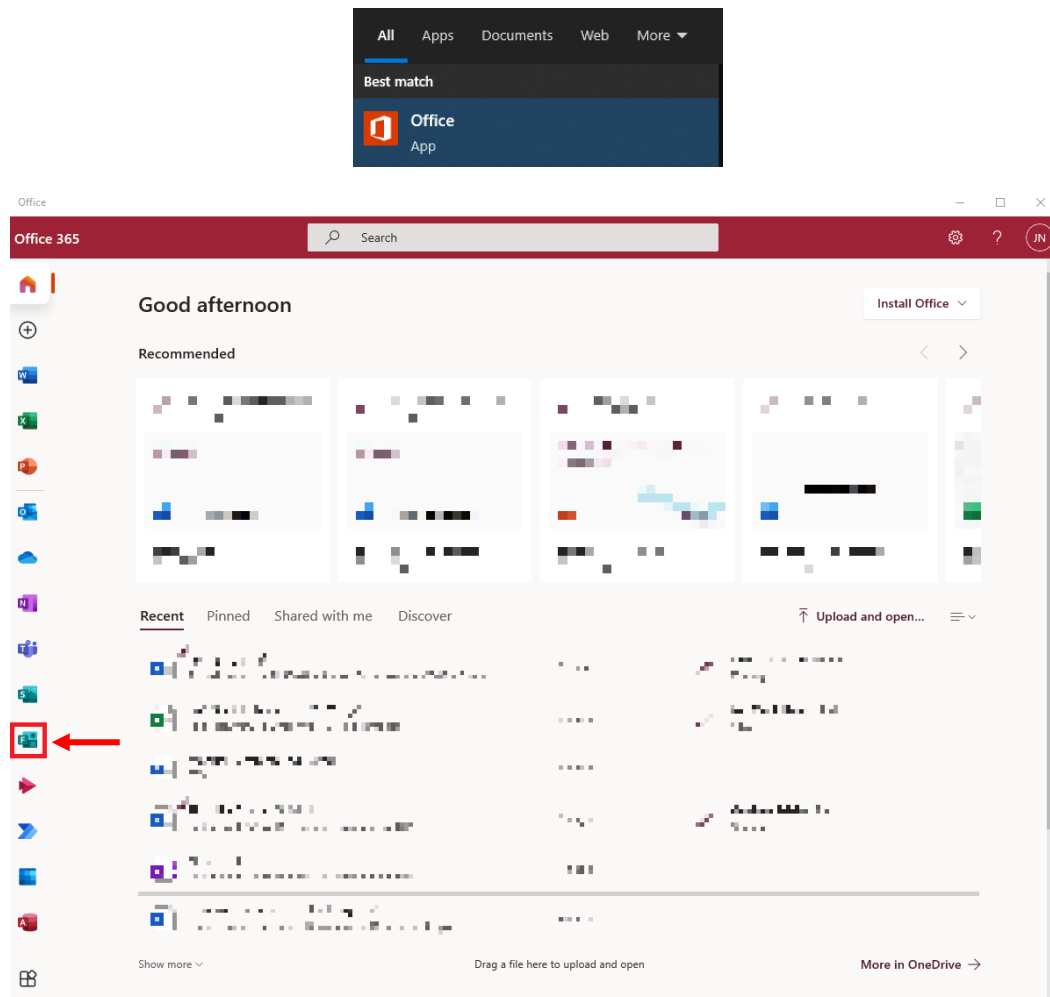
What is Microsoft Forms

Microsoft Forms is used for creating surveys, quizzes, or polls. The Form can be standalone and shared via a link, QR code, or email; or it can be integrated into Microsoft Teams to either poll a chat/group chat or participants during a meeting.

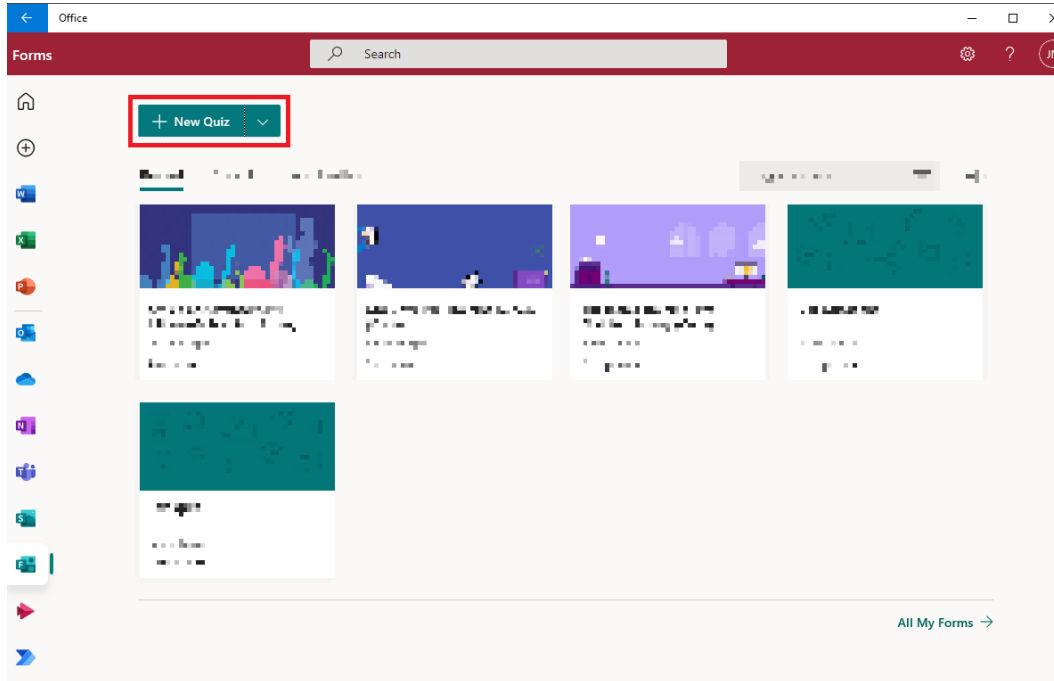
Accessing Forms

To access Microsoft Forms, click [here](#) to access through the web. Sign in with your @smu.ca email address and password. Then click on **Forms** on the left-hand side.

You can also click the Office App (if you have Office 365 installed on your device). To do so, click the start button and search for **Office**. Click on the Office App, then select **Forms** from the left-hand side.



Click either **New Quiz** to create a Quiz or click the drop-down and select **New Form**. A webpage will open to start the creation of the Form or Quiz.



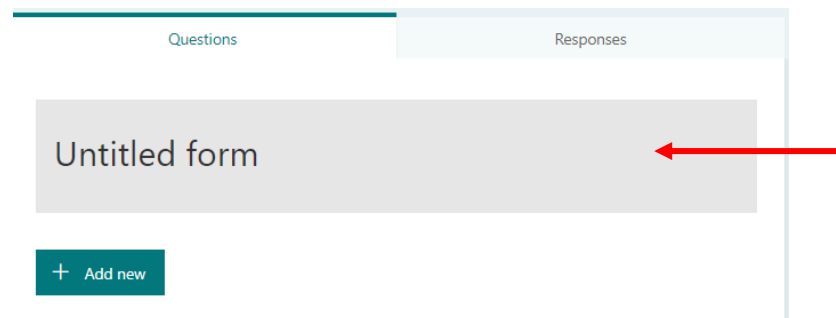
Form vs. Quiz

A form is like a survey or a poll – there is no correct answer. A quiz can have answers and scores as well as math equations. You can also provide feedback on users' answers depending on if the answer is right or wrong.

Creating a Form (questions tab)

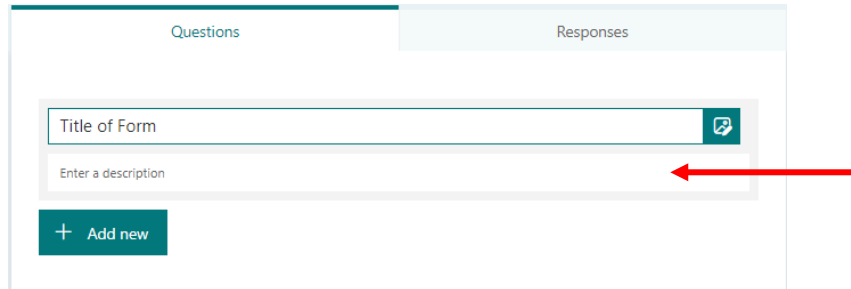
Title

Enter a title on the title box of the form



Description

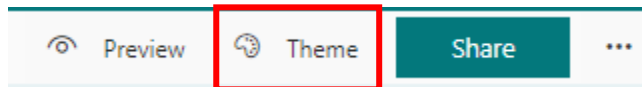
If you want to have a short description for the form, enter it below the title



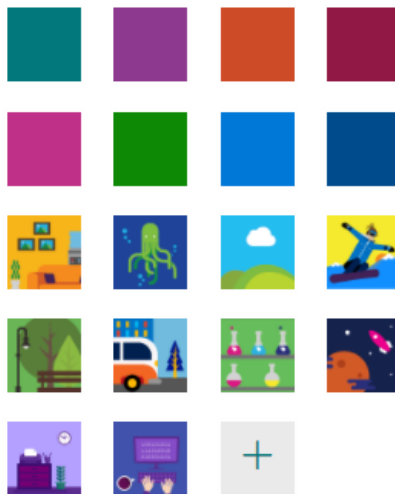
The screenshot shows a form editor interface with two tabs: 'Questions' and 'Responses'. The 'Responses' tab is active. Below the tabs, there is a text input field labeled 'Title of Form' with a small icon to its right. Below this field is a larger text input field labeled 'Enter a description'. A red arrow points to the right side of the 'Enter a description' field. Below the description field is a teal button with a plus sign and the text '+ Add new'.

Theme

To choose a theme for the form, click the Theme button in the top-right

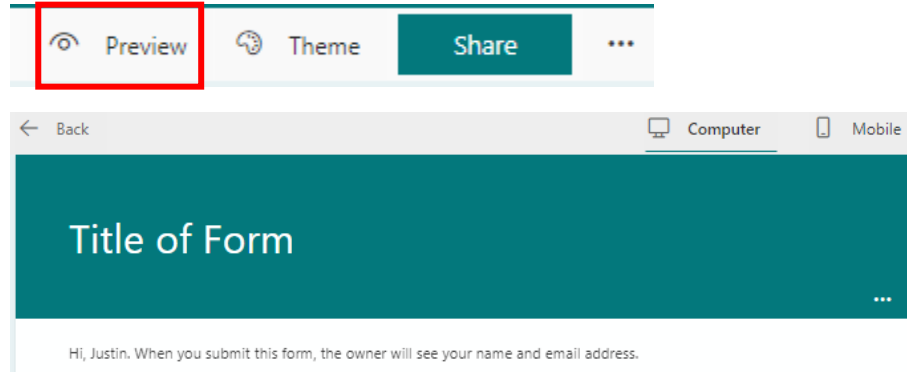


A new side bar will open. Here you can select the colour scheme or background/theme of the form. You can also create your own theme by selecting the + button. A new side bar screen will load, and you can choose an image and colour scheme

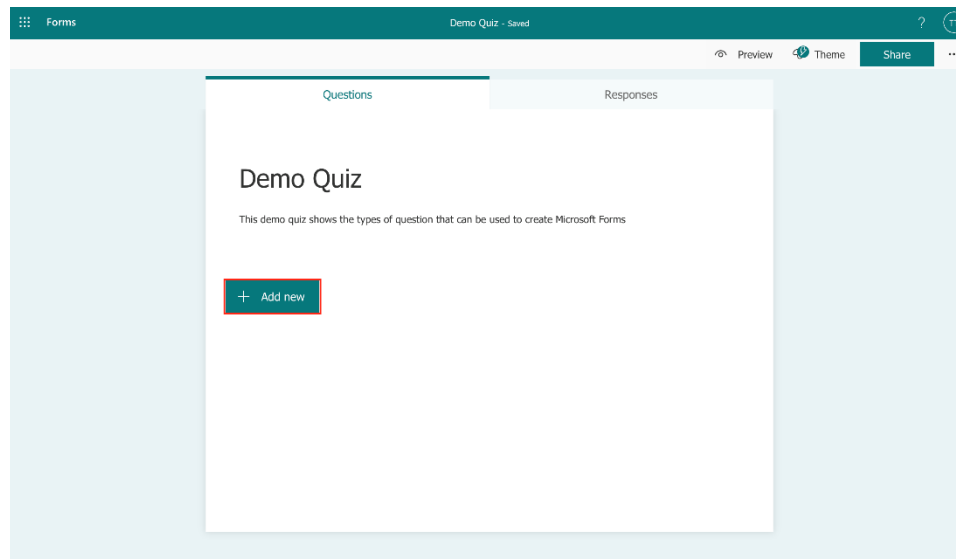


Preview

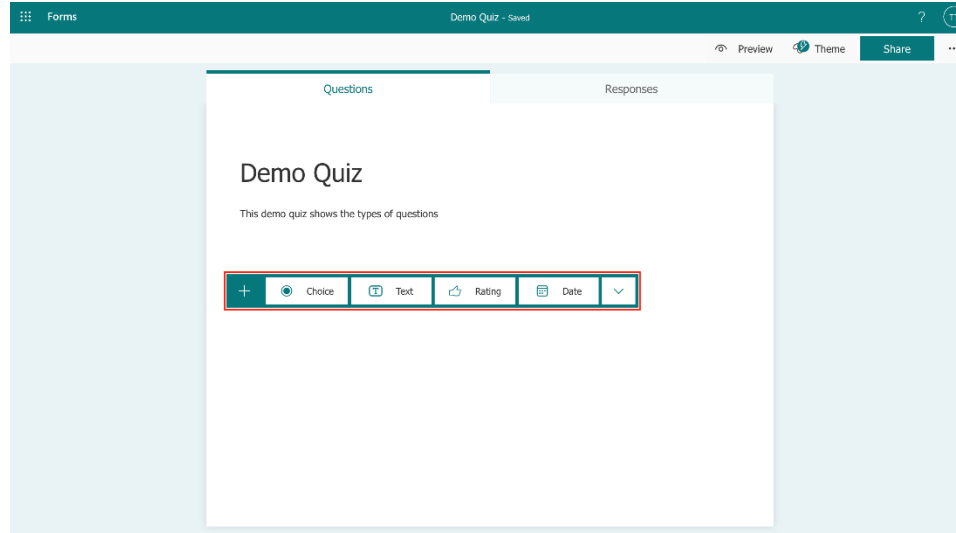
To preview your form/quiz click the Preview button in the top-right. This will allow you see how participants would see the form. You can also preview to see how it would look on a computer compared to a mobile device. Click the ← button to go back to the form creation page



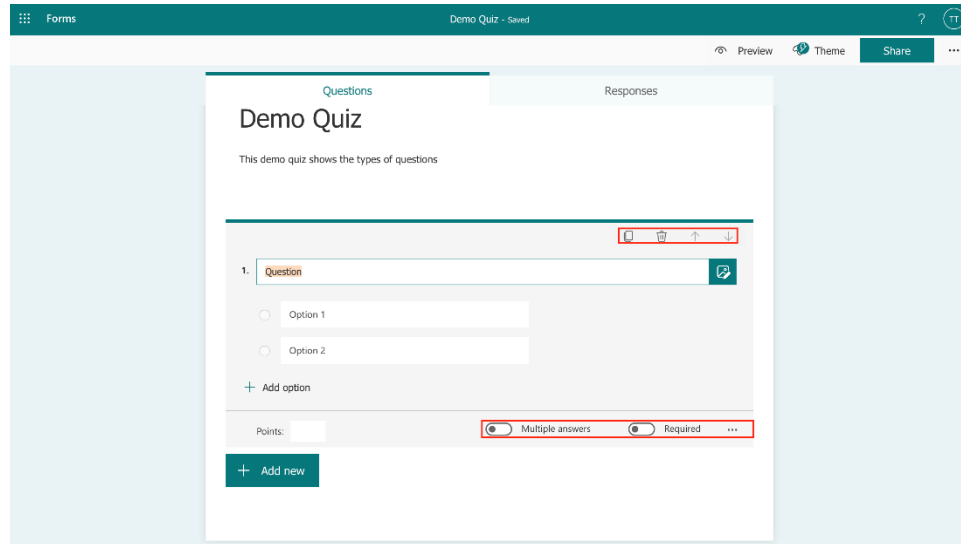
Question Types:



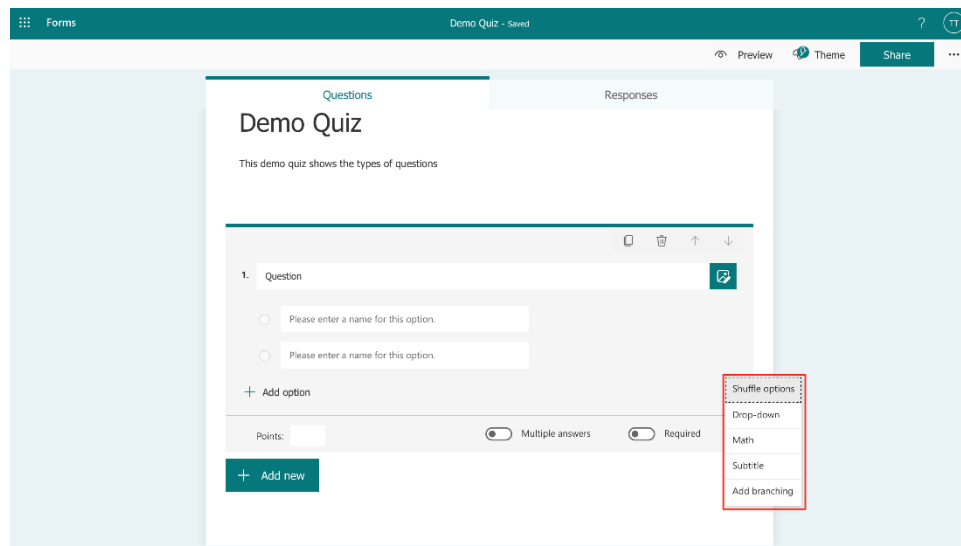
2. Select the type of question you want to add for example, **Choice**, **Text**, **Rating** or **Date**. You can also click on the drop-



Choice: Use this question type for multiple choice questions. **Multiple answers** can be used if **turned on** and the **Required** button makes the question mandatory in order to proceed with the questions. Other options include **Shuffling** the answers, displaying answers as a **Drop-down list**, adding **Math** related question which might include different formula/equation, **Subtitles** under the question, as well as **Branching** option for answers.

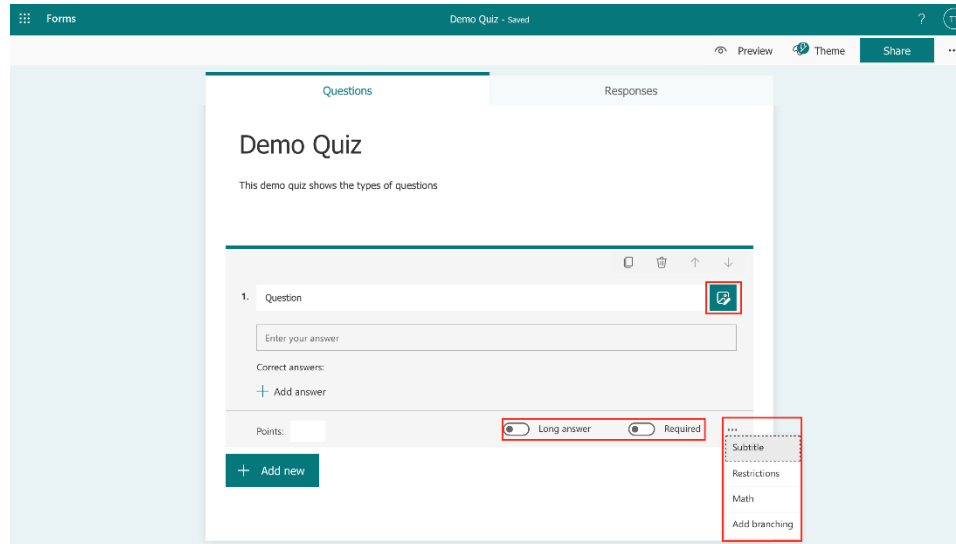


The screenshot shows the 'Questions' tab of a 'Demo Quiz' editor. The question text is '1. Question'. Below it are two radio button options: 'Option 1' and 'Option 2'. At the bottom, there are two toggle switches: 'Multiple answers' (checked) and 'Required' (unchecked). A red box highlights these two toggle switches.

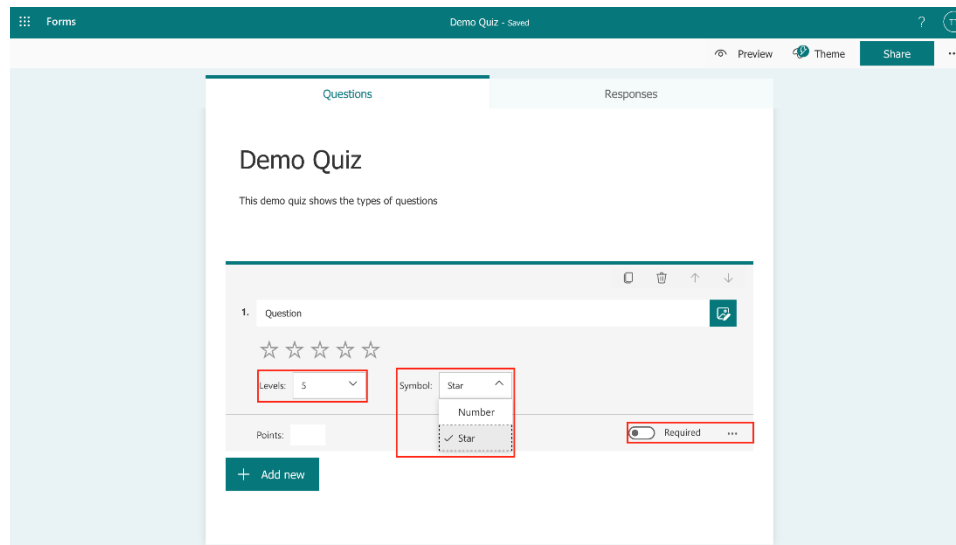


The screenshot shows the same 'Demo Quiz' editor. The question text is '1. Question'. Below it are two radio button options: 'Please enter a name for this option.' and 'Please enter a name for this option.'. At the bottom, there are two toggle switches: 'Multiple answers' (checked) and 'Required' (unchecked). A red box highlights a dropdown menu that is open, showing options: 'Shuffle options', 'Drop-down', 'Math', 'Subtitle', and 'Add branching'.

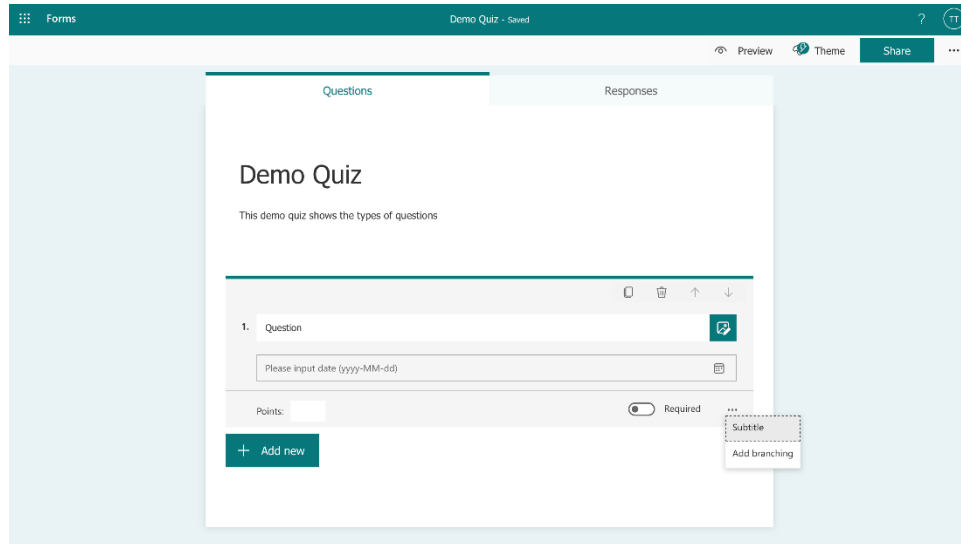
Text: Use this type of question that requires a written answer. Options include allowing **Long answers**, making the question **Required** so that the user doing the quiz has to complete the question in order to proceed. Other option includes adding **Subtitles** under the question, putting certain **Restrictions** for the answer, adding **Math** related question and **Adding branch** to the question.



Rating: This type of question asks respondents to provide a rating on a scale. The **Scale** and **Level** can include between two and ten levels, and you can choose between a **Number** scale or **Star** scale. Other options include adding **Subtitles** under the question, **labelling** each levels and **Adding branch** to the question.

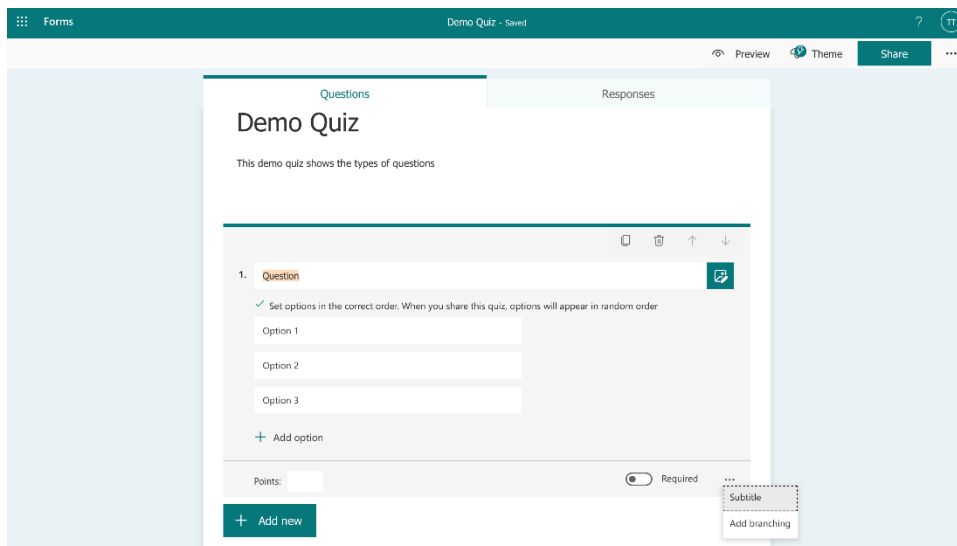


Date: Use this type of question when the answer is a date (i.e. enter your birthdate).



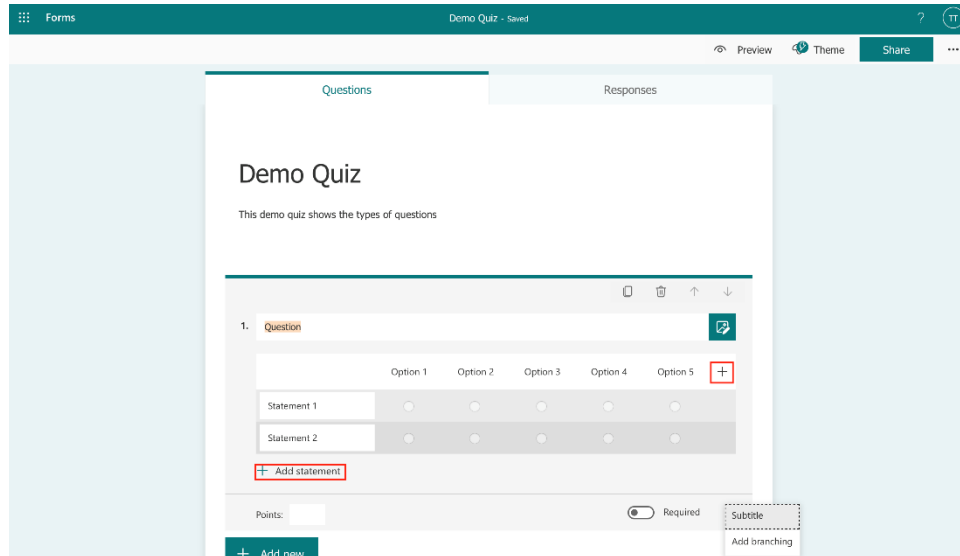
The screenshot shows the 'Questions' tab of a quiz editor. The quiz is titled 'Demo Quiz' and has a subtitle 'This demo quiz shows the types of questions'. A single question is displayed: '1. Question' with a date input field containing the placeholder text 'Please input date (yyyy-MM-dd)'. Below the question, there are fields for 'Points' and a 'Required' toggle switch. A dropdown menu is open, showing options for 'Subtitle' and 'Add branching'. A '+ Add new' button is visible at the bottom left of the question editor.

Ranking: The ranking question type allows respondents to rank the options you provide by dragging and dropping. You can also add up to ten options.

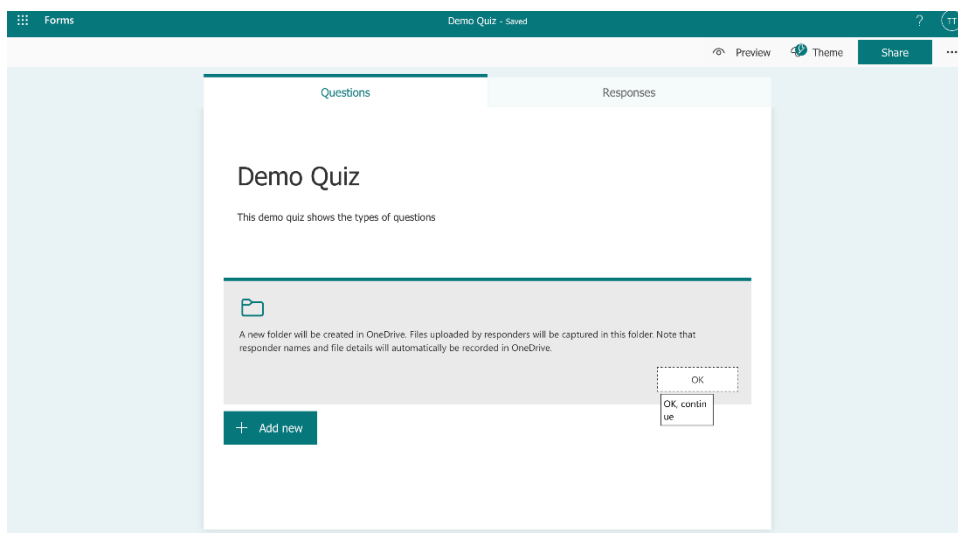


The screenshot shows the 'Questions' tab of a quiz editor. The quiz is titled 'Demo Quiz' and has a subtitle 'This demo quiz shows the types of questions'. A single question is displayed: '1. Question'. Below the question, there is a checkbox labeled 'Set options in the correct order: When you share this quiz, options will appear in random order'. Below this are three input fields labeled 'Option 1', 'Option 2', and 'Option 3', followed by a '+ Add option' button. At the bottom, there are fields for 'Points' and a 'Required' toggle switch. A dropdown menu is open, showing options for 'Subtitle' and 'Add branching'. A '+ Add new' button is visible at the bottom left of the question editor.

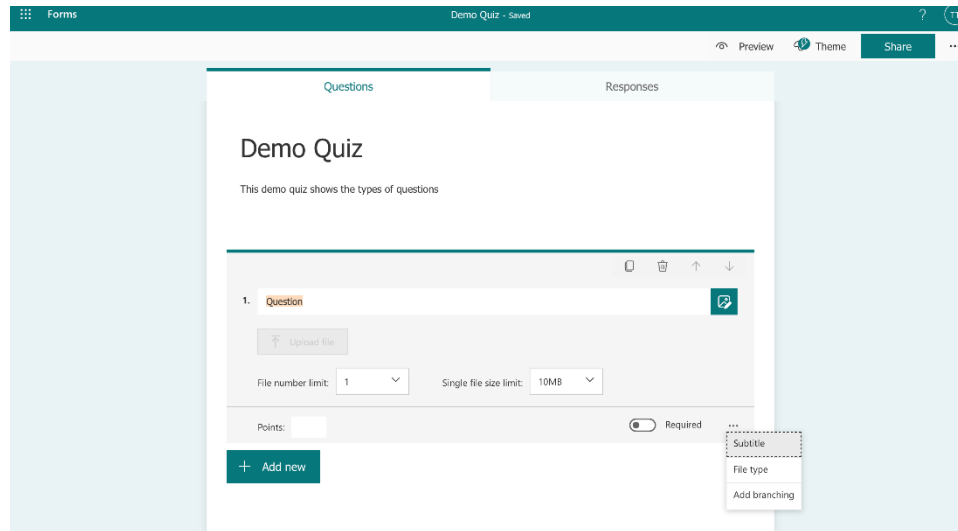
Linkert: This question type asks respondents to indicate how much they agree or disagree with a statement. You can add up to **twenty Statements** and **seven Options**.



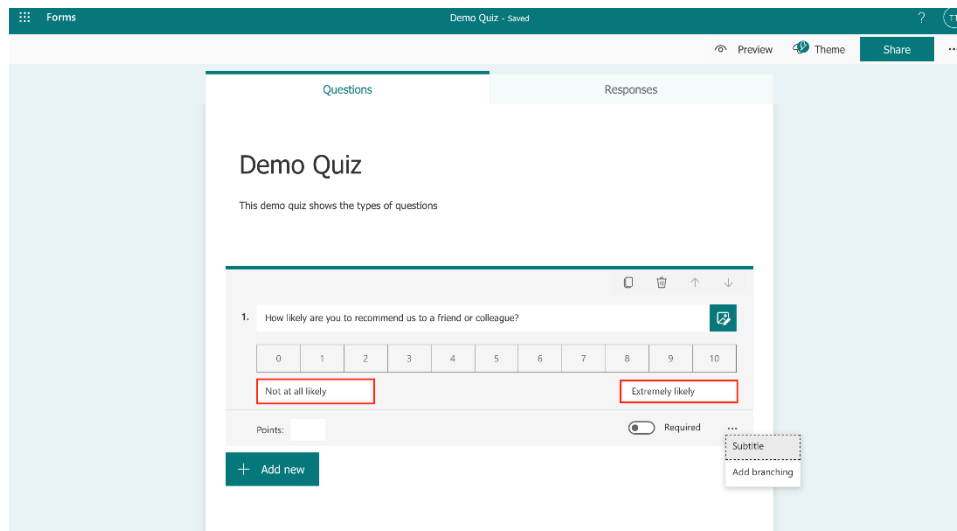
File upload: This question type is only available to users in the organization (they will have to use their @smu.ca email address). Choosing this question type will **create a new folder** in your **OneDrive** and respondents will upload their files to that folder.



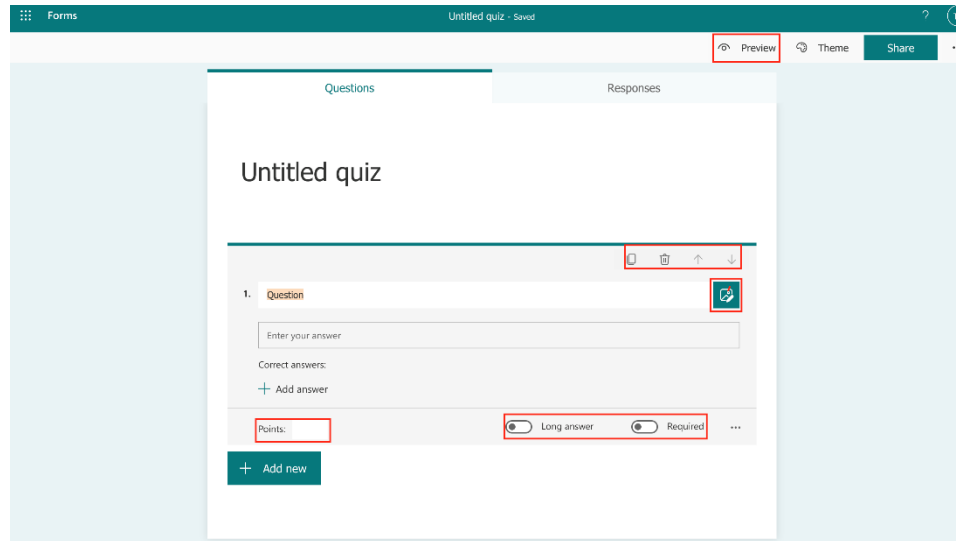
Once you click **OK**, it will take to another page to continue with the question as shown in the picture below. You can select the **File number limit** from one to ten and **Single file size limit** from **10MB**, **100MB** or **1GB**. Other options include you to add **Subtitles** under the question, specifying the **File type(s)** such as **Word**, **Excel**, **PPT**, **PDF**, **Image**, **Video** or **Audio** as well as **Adding branching** to the question.



Net promoter score: This question type is similar to the rating question type. If you use this type of question, you will have access to a summary page showing overall scores and distribution. You also have the option to change the text inside the red box.



Note: You can **copy**, **delete**, **move** any question which can be selected while making the question at the right-hand side of the question page, above the question as well as add **points**. You can also add an **image** or **video** with the question from your device.

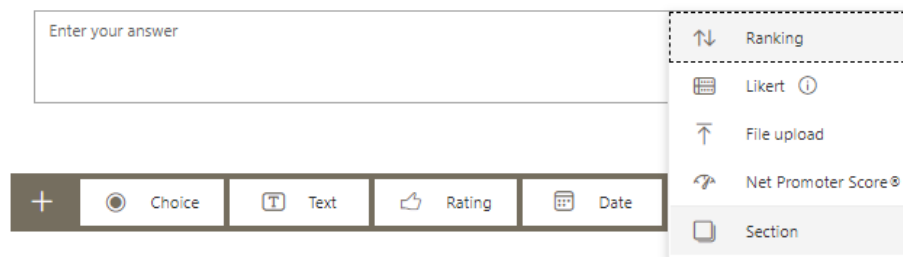


Sections

Sections are used to separate parts of the form/quiz from other parts in order to keep the form organized. You can group related questions into their own area or create branching conditions to direct respondents to other sections based on their answers. You can also duplicate, remove, or move a section by clicking the ... of the section header

To add a section:

Click **+ Add New** button, select the drop-down arrow on the right, and choose Section. Give the section a name and description (if applicable)



If you use sections in the form, the shuffle questions setting will be disabled

Branching logic

When using Branching, you direct respondents to other questions or sections of the form based on the answer they give to a question.

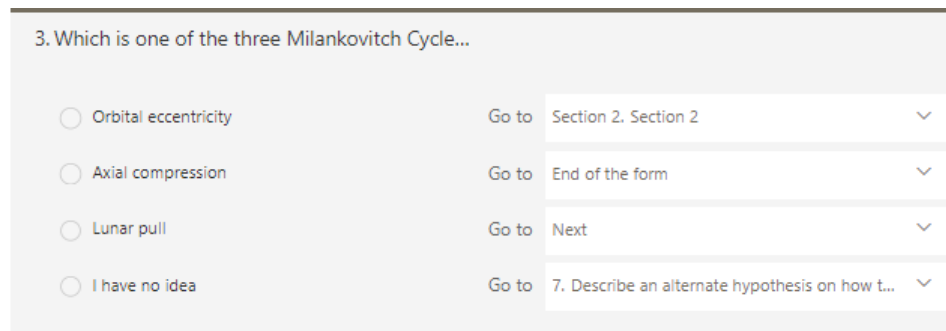
For example: If a form asks if you want to do more questions, if you choose yes – then more questions load, whereas if you choose no – it takes you to the end of the form

When using branching is used in the Form, a symbol appears next to the Form title

The Cloudy Day Quiz (11 Points) ←

This quiz is to showcase how the results section works in Forms

To enable branching on any question or section, click the ... and select **Add Branching**. You can choose how you want each question option to behave:



3. Which is one of the three Milankovitch Cycle...

<input type="radio"/> Orbital eccentricity	Go to	Section 2. Section 2	▼
<input type="radio"/> Axial compression	Go to	End of the form	▼
<input type="radio"/> Lunar pull	Go to	Next	▼
<input type="radio"/> I have no idea	Go to	7. Describe an alternate hypothesis on how t...	▼

***for the above image:

If Orbital eccentricity is chosen then it will direct them to Section 2

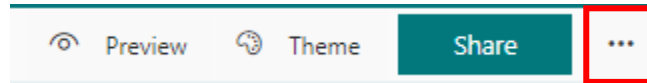
If Axial compression is chosen then it will direct them to the end of the form

If Lunar pull is chosen it will direct them to the next question

If I have no idea is chosen it will direct them to question 7

Settings

To view and change the settings of the form, click the ... in the top-right of the form



You can also set a start and end date for the form, as well as create a Thank You message, shuffle questions, and collect response receipts:

Settings

Option for quiz

Show results automatically

Responders will see their results and correct answers immediately after submitting the quiz.

Who can fill out this form

Anyone can respond

Only people in my organization can respond

Record name

One response per person

Specific people in my organization can respond

Options for responses

Accept responses

Start date

End date

Shuffle questions

Show progress bar

Customize thank you message

Response receipts

Allow receipt of responses after submission

Get email notification of each response

Creating a Quiz (questions tab)

Very similar to creating a Form, only with quizzes you can provide a correct answer as well as math equations.

To insert a math equation, first choose a choice or text question. Then select the ... and click **Math**. Type the question text, click the equation field and a calculator/equation maker will load. Enter the equation manually or you can use Latex to enter the question. This feature works natively without any additional syntax, but can only be used in the question text and answers

8. Solve for x

$3 = x^2 + 5x - 10$

x	y	$x_{ }$	$\frac{x}{ }$	[]	()	7	8	9	÷
>	<	≥	≤	≠	x	4	5	6	×
$\sqrt{ }$	$\sqrt[]{ }$	x^2	$x^{ }$	log	ln	1	2	3	-
π	x!	∑	∏	[x]	[x]	0	.	=	+
∞	*					CE	←	→	OK

Enter the answer/other answer choices in the option boxes. Forms will calculate the correct answer (make sure to double check) as well as give other choices.

8. Solve for x

$3 = x^2 + 5x - 10$

$x = \frac{\sqrt{77}-5}{2}; x = \frac{-\sqrt{77}-5}{2}$ ✓ Correct answer

$x = \sqrt{89} - 8; x = -\sqrt{62} - 6$

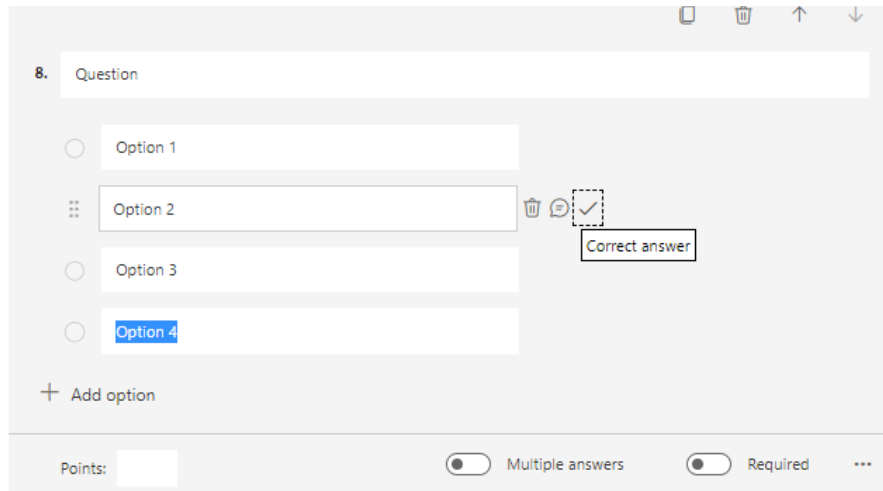
$x = \sqrt{97} - 7; x = \frac{-\sqrt{77}-8}{4}$

$x = \frac{\sqrt{86}-8}{2}; x = -\sqrt{97} - 4$

+ Add option

Points: 3 Multiple answers Required ...

To select the correct answer when making a question, mouse over the correct answer and click the **check mark** on the right. You can also set the points for this question in the **Points** field



8. Question

Option 1

Option 2 Correct answer

Option 3

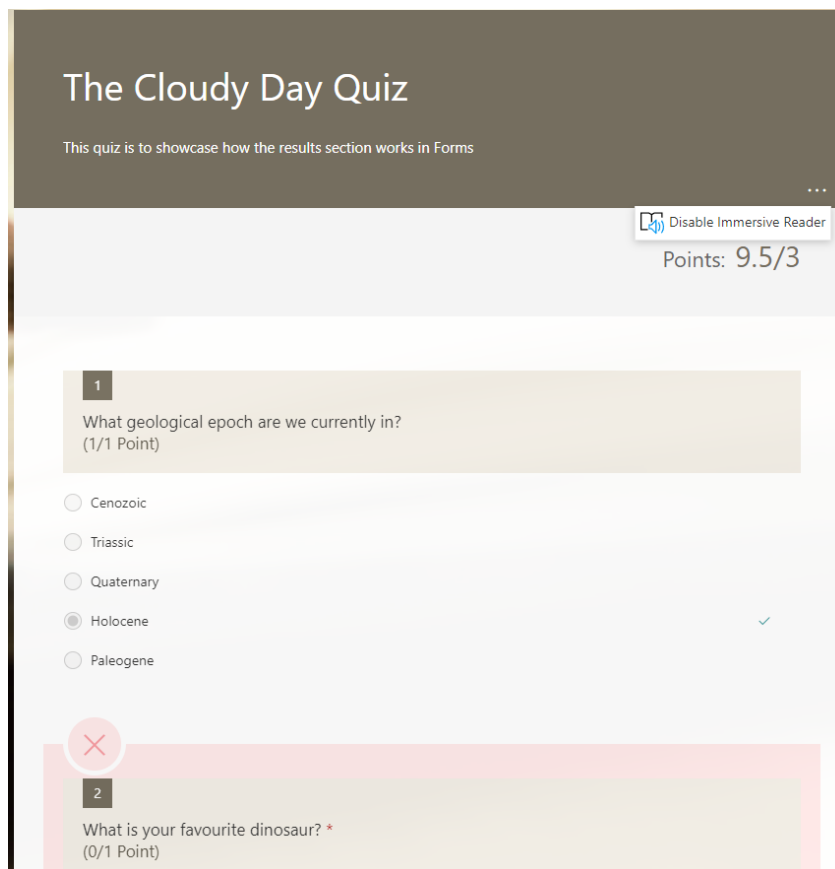
Option 4

+ Add option

Points:

Multiple answers Required ...

Users can view their results (scores), see what they got wrong and see updated grades when the organizer marks other questions (i.e. written response)



The Cloudy Day Quiz

This quiz is to showcase how the results section works in Forms

Points: 9.5/3

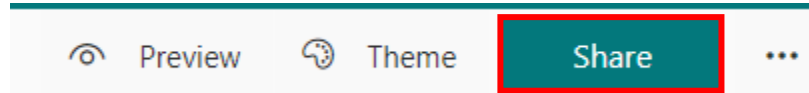
1 What geological epoch are we currently in?
(1/1 Point)

- Cenozoic
- Triassic
- Quaternary
- Holocene
- Paleogene

2 What is your favourite dinosaur? *
(0/1 Point)

Sharing the Form

To share your Form or Quiz, click the **Share** button in the top right.

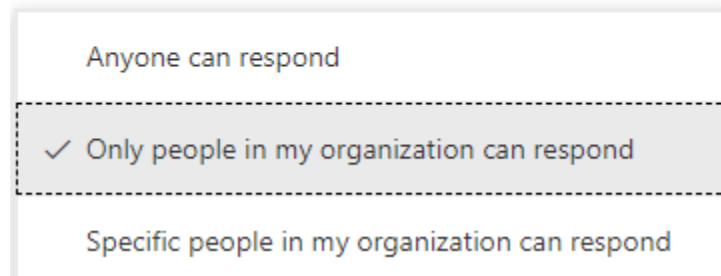


Select who can access your Form by clicking the drop-down arrow

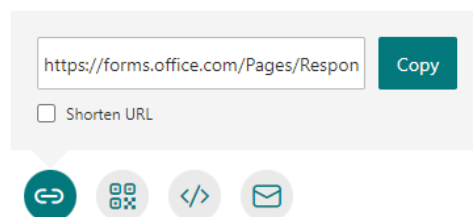
- **Anyone can respond** means anyone can complete the form
- **Only people in my organization can respond** means only people with a @smu.ca email can complete the form
- **Specific people in my organization can respond** means only people that you have specified with a @smu.ca can complete the form

Send and collect responses

Only people in my organization can respond



You can select the link button, and either copy the URL address or click the shorten URL button then the copy button and share the link in a chat or email



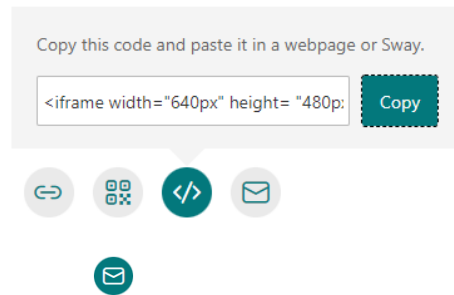


You can select the QR code button and click download. This will download a .PNG image that you can insert into a chat, email, textbox, etc.

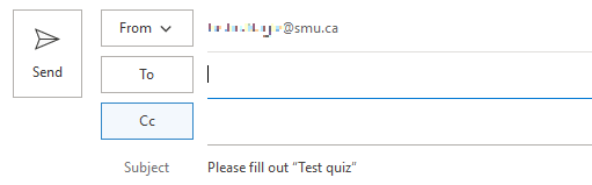


Embed `</>` 

You can select the embed button to copy the code to embed the form in a website, Brightspace module, etc.



You can select the email button to open your email application of choice and send the email to the participants



Send

From

To

Cc

Subject Please fill out "Test quiz"

Here's the link to the form "Test quiz":
<https://forms.office.com/Pages/ResponsePage.aspx?id=rgLLBnVXYEOruuLinMpmJ-SSC7GcVYRMg3qfyEC2el5SUNEYxSUxFMDJEUU9DQJ8aWfdRRIVYNDdLTi4u>

 Microsoft Forms
 Create your own forms at forms.office.com

Share as a template

You can also share your form as a template, meaning the user you share the link with will be able to make a copy of your form

Share as a template

+ Get a link to duplicate



Share as a template

Anyone with the link can duplicate

<https://forms.office.com/Pages/Share.aspx?ID=...>

Copy



Share to collaborate

You can also share your form to your colleagues to collaborate on the form. You can also set who can access the form

Share to collaborate

+ Get a link to view and edit



Share to collaborate

Users with an Office 365 work or school account can collaborate

<https://forms.office.com/Pages/Design.aspx?ID=...>

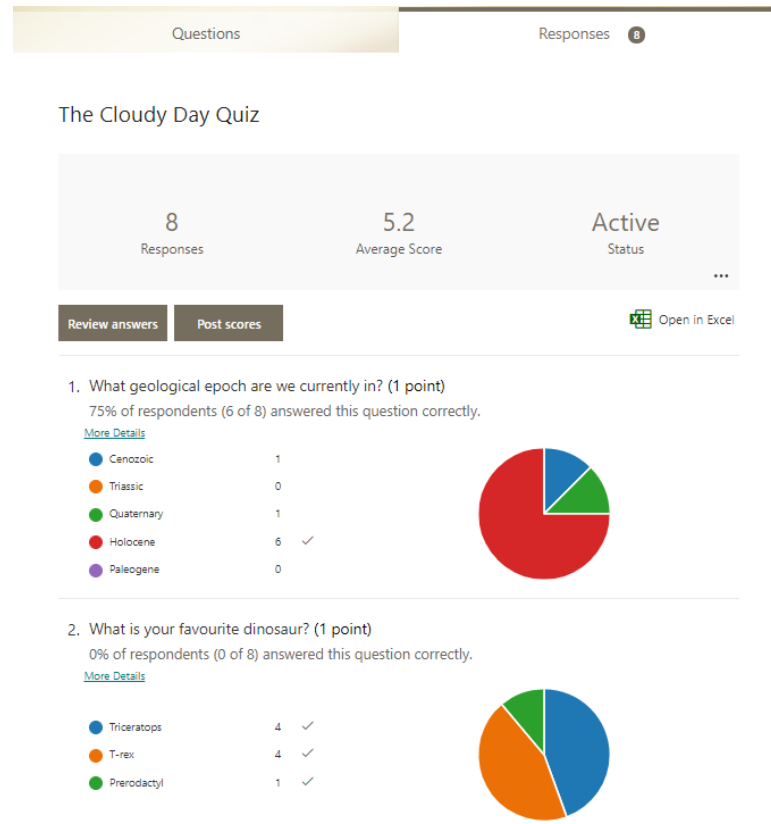
Copy



Viewing Results (responses tab)

As a form organizer, you can view user responses and grade their answers under the Responses tab of the Form/Quiz

When on the Responses Tab, a summary of how many users chose a specific answer as well as a pie chart of all answers chosen. This is updated in real-time



To grade uses responses click the **Review** answers button. To select different users, click the drop-down arrow and select the different user. To grade a question input the amount points for the user

← Back Review next

Review: The Cloudy Day Quiz

People Questions

Select User

< Jane Husky (4) > Time to complete: 00:18 Points: 4/11 🔔

1. What geological epoch are we currently in? 0 / 1 pt
Auto-graded

- Cenozoic
- Triassic
- Quaternary ✕
- Holocene ✓
- Paleogene

2. What is your favourite dinosaur? 0 / 1 pt
Auto-graded

- Triceratops ✓
- T-rex ✓
- Prerodactyl ✓

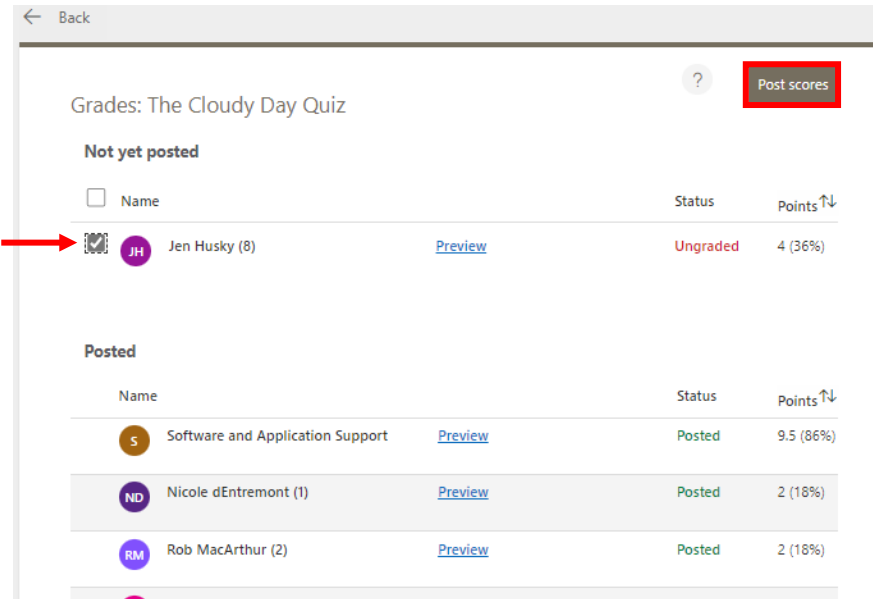
3. Which is one of the three Milankovitch Cycles? 1 / 1 pt

- Orbital eccentricity
- Axial compression
- Lunar pull
- I have no idea

4. What shape best described Earth? 1 / 1 pt
Auto-graded

- Sphere
- Cycle
- Oval
- Oblique Spheroid ✓

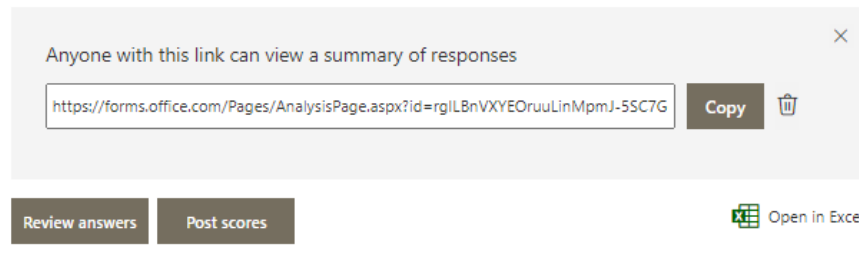
To post the scores that users got on the quiz, click the **Post scores** button. A new window will open. Select the user(s) under the Not yet published header, and click the Post Scores button



Summary Link

You can also obtain a summary link by clicking the ... on the Responses tab and selecting **Get a summary link**. This link would be useful if you wanted to show users the distribution (statistics) of the answers. Individual user responses remain hidden.

The Cloudy Day Quiz



Export to Excel

If you click the button **Open in Excel**, an Excel file will download that you can open. Here, the responses to each question is recorded as well as the total score, and user information


ID	Start time	Completion time	Email	Name	Total points	Quiz feedback	Grade posted time	What geol	PA	Feedback - What	What is your favou	Pe
1	11-16-21 16:16:41	11-16-21 16:17:09	SAS@SMU.CA	Software and Applic	9.5		11-16-21 16:30:13	Holocene	1		Triceratops;	
2	11-16-21 16:16:40	11-16-21 16:17:35	nicole.dentremont@	Nicole dEntremont	2		11-16-21 16:30:13	Holocene	1		T-rex;	
3	11-16-21 16:19:10	11-16-21 16:19:45	Rob.MacArthur@smu	Rob MacArthur	2		11-16-21 16:30:13	Holocene	1		Triceratops;T-rex;	
4	11-16-21 16:19:53	11-16-21 16:20:24	Hem.Sai.Charan.Kott	Hem Sai Charan Kott	2		11-16-21 16:30:13	Holocene	1		Triceratops;	
5	11-16-21 16:20:41	11-16-21 16:20:59	sasdemo2@SMU.CA	Jane Husky	4		11-16-21 16:30:13	Quaternary	0		Prerodactyl;	
6	11-17-21 9:48:44	11-17-21 9:51:56	Matthew.Salah@sm	Matthew Salah	4		11-17-21 10:32:51	Holocene	1		T-rex;	
7	11-17-21 10:28:15	11-17-21 10:31:55	Sayan.Maity@smu.c	Sayan Maity	10		11-17-21 10:32:51	Cenozoic	0		Triceratops;	
8	11-17-21 12:55:42	11-17-21 12:59:25	Tahira.Tabassum@	Tahira Tabassum	8		11-17-21 13:02:06	Holocene	1		T-rex;	
9	11-19-21 10:45:45	11-19-21 10:46:08	sasdemo1@SMU.CA	Jen Husky	4		11-19-21 10:49:23	Holocene	1		Prerodactyl;	

Adding a Form to a Teams chat/group chat

Forms in Teams chat are referred to as Polls. To add a poll to a chat, first make sure that the **Forms app** is installed in Teams. It should look like this symbol in a chat



If you do not see this symbol, click the **Apps** button on the left-hand side of Teams and search for **Forms**. Then click on the Forms app and select **Add**. You can also specify if you want to add it to a team, chat, or meeting



Forms
Productivity, Utilities, Microsoft

×

Add

👤 Add to a team

🗨 Add to a chat

📅 Add to a meeting

Easily create surveys, quizzes and polls.

Easily create surveys, quizzes and polls.

Tabs
Use in a tab at the top of a chat or channel

Bots
Chat with the app to ask questions and find info

Messages
Insert content from the app directly into messages

Notifications
Get notifications from the app in a channel

Meeting
Create rich, interactive meeting experiences


Created by: Microsoft Corporation
Version 1.1.0
Supported Languages:

- Dansk
- Deutsch
- Eesti
- English
- English (United Kingdom)
- Español
- Español (México)
- Français

By using Forms, you agree to the [privacy policy](#) and [terms of use](#).



Create your Multiple Choice Poll – similar to choice type question above. You can choose to share results automatically after voting, as well as Keep responses anonymous. Click Save when done making the poll

 **Forms**
Powered by Microsoft Forms ×

Multiple Choice Poll

Question

Option 1

Option 2


[+ Add option](#) Multiple answers

Share results automatically after voting

Keep responses anonymous

[Save](#)

When you are ready to send the form click **Send**

 **Forms**
Powered by Microsoft Forms ×

Here is a preview of the card you will be sending.

Justin Nagle created a poll
Poll: Not anonymous ; Results shared

Question

Option 1

Option 2

[Submit Vote](#)

[Edit](#) [Send](#)

You can see responses to the form in real-time

Justin Nagle created a poll
Poll: Not anonymous ; Results shared

Question

Option 1

Option 2

[Submit Vote](#)

i Your response was sent to the app
×

Edited

Option 1	100% (1)
Option 2	0% (0)

Forms in Teams Meeting

You can create a poll and launch it before, during, or after your meeting. To begin, find the meeting that you have scheduled in the Calendar Tab in Teams and select it, then select **Chat with Participants** (this will open a Teams chat with the participants). Then click the **+** (Add a Tab) button and search for and select Forms. Then click **Save**.

To create a new poll, select the Polls tab in the Meeting Chat and click **+Create New** and then choose either:

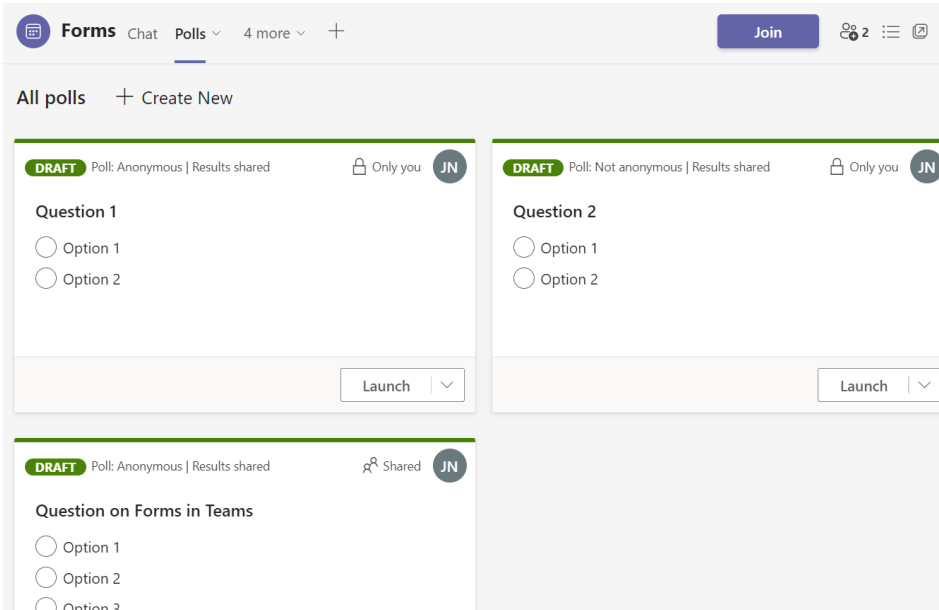
Multiple Choice Poll – create your question and provide answer options for your participants to choose

Multiple Choice Quiz – mark the correct answer for your question (similar to Creating a Quiz section)

Word Cloud Poll – Ask an open-ended question and see responses reflected in a word cloud

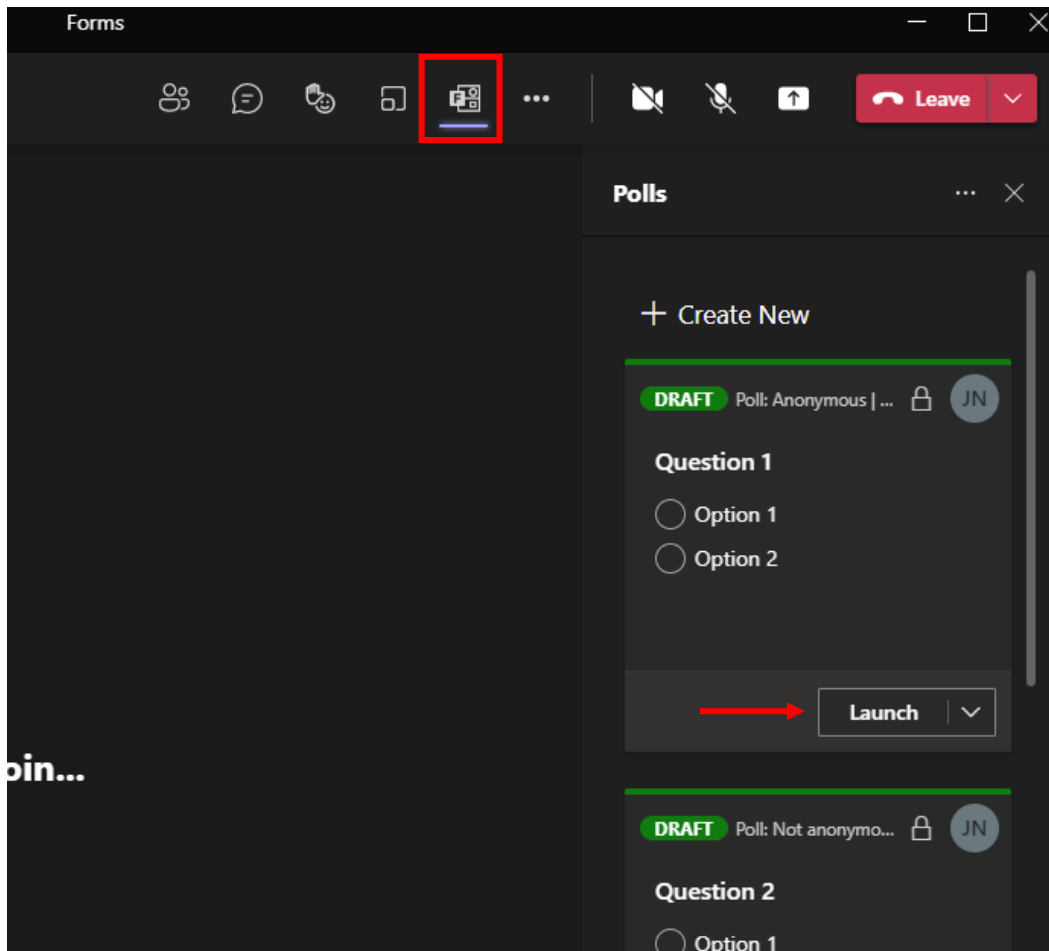
Select **Save** to save the poll as a draft. You will be able to launch this poll in your meeting when you are ready

You can change the order of your polls by dragging it to the position you want



To launch a poll, select **Launch**. This can be done before, during, and after your meeting

To launch a poll during a meeting, select the **polls pane** if you have (draft polls already made) and select **Launch** next to the poll you want to launch



If you want to launch a poll during a meeting (and you have not set up a poll in advance). Open the chat pane in the meeting, selecting ... and select **Messaging Extensions**, then search for and select **Forms**. You can then create a poll as shown above, and **save** then **send** the Poll