

Forms/Surveys Training (CMS)

University Human Resources

June 2010

Search by:

Category:
Select

Search by specific keywords, such as "comment"

Form Name Contains:

Select a date range to view current or past news stories.

Created Between: To:

Cancel X

Search 

After you set your search parameters, click this button to change what is displayed below.

 Add New Form

	Name	Category	Date						
	Moore Practice Form	Any	06/14/10	?	Publish		0		
	Meadow Brook Music Festival Tickets	Any	05/24/10	?	Publish		12		
	SHS - Physical Therapy Contact Us	Any	04/08/10	?	Publish		27		
	SHS - Occupational Safety and Health Contact Us	Any	04/08/10	?	Publish		8		
	SHS - Medical Laboratory Sciences Contact Us	Any	04/08/10	?	Publish		0		

1 2 3

Page 1 of 3, items 1 to 15 of 38.

Click on Add New Form to create a new form, or the pencil icon to edit an existing form.

Items with a red asterisk (*) are required.

Form/Survey/Poll Settings ?

Create New Form

Manage Form

Manage Questions

Preview

Link

Submissions

Submissions Graph

Customize your form/survey settings using the options provided below. If submitter information needs to be displayed and/or required, check the appropriate check boxes.

*Form Name:

The title of the form should be brief. A few words.

*Category: ?

Start Date:

6/15/2010

Inactivate: ?

Always Active

Purpose:

Form Poll Survey

Selecting Form, Poll or Survey changes the next options.

Layout: ?

Layout 1 Layout 2

Include Question Number: ?

Header Instructions:

Footer Instructions:

Thank You Message:

Header and footer instructions should include information users need to complete the form and to follow up. The thank you message appears after the user has submitted the form.

The difference between a form and a survey is simply the layout of the questions. Both are able to collect personal data about the user and compile results from each question. Form/survey questions can be check boxes, radio buttons, drop down menus, text boxes, or text areas. The poll option doesn't collect personal information, and only allows user to make one choice via radio button or drop down menu.

 Launch rich text editor

Advanced Settings

Confirmation?: ?

After the form is submitted, do you want the user and administrator to receive confirmation notices?

Admin Email Notification?: ?

If you want results of the form/survey to be sent to someone other than the administrator, check this box and fill in the next two fields.

Email Results To:

Email subject:

Redirect Url: ?

After submission, you can redirect the user to a particular webpage.

Page ID (if known): ?

Show Content: ?

Other Information:

Save Form Data?

Is SSL Required?

Use Captcha?

Taxonomy:

These are the default security settings. For more information contact the Careworks Staff in UCM.

Cancel X

Save ✓

Click Save to continue

Manage Questions ?

Sample for Training

Manage Form

Manage Questions

Preview

Publish

Submissions

Submissions Graph

Create, copy or manage questions using the options below. Check the box "Include deleted questions" to include deleted questions in the list.

Show deleted questions

 Manage Section & Header

Add New Question

Question	Section	Header	Type	Required	SortO
 <u>Creating forms and surveys within the CareWorks system will make my job so much easier.</u>			Radio Button	True	1

The manage questions tab has a list of questions as well as profile settings related to general user information.

At the top of the page it lists current questions (if any) and has a link to add new questions.

At the bottom of the page, you can choose to make a particular profile setting be displayed and/or required. If you change any profile settings, be sure to click the Save button.

Profile Settings

Choose one or more profile settings from the options below. "Display" checkbox will provide an option for the user to enter the respective setting. "Required" checkbox will require the user to enter the respective setting.

Check to display all profile settings

Check to require all profile settings

Name Format: Full Name First & Last Name

Address1: Display? Required?

Name: Display? Required?

Address2: Display? Required?

Phone: Display? Required?

City: Display? Required?

Email: Display? Required?

State: Display? Required?

Zip: Display? Required?

Save

Cancel

Form/Survey Questions ?

Sample for Training

Disclaimer: Please check the "Encrypt question" checkbox, for all secure information.Section: ? Show Section  Manage Section*Question:  Launch rich text editorQuestion Required?: Format Suggestor: ? Include question in email?: Sort Order: 1   Sort QuestionsTool Tip: ?

Advanced Settings

*Question Type: Dependent On: ? Layout: ? Horizontal VerticalOptions: ? Add my own Predefined AnswerPredefined Questions: Add Answer:  To add your own answer, enter text and click this button.
   

After you click Add New Question, you'll be able to create different types of questions, such as multiple choice and short answer. Radio buttons and drop down lists allow one choice only. Check boxes allow multiple choices. Take a few minutes to check out the different options. Different fields populate depending on what you select.

You can create your own multiple choice answers by clicking the green plus sign, or choose from predefined answers (such as gender, ratings, or months of the year). Again, these options change with every question type, so you'll have to spend some time looking around!

Be sure to click SAVE after you've created your question!

Form/Survey Questions ?

Sample for Training



Question has been created/updated.

Back



Preview



If you see this message, your question was created successfully.

Form/Poll/Survey Preview ?

Sample for Training

Manage Form

Manage Questions

Preview

Publish

Submissions

Submissions Graph

View in Design

View in Browser

Sample for Training

This is an example of a FORM for training purposes.

Name

• Email

• **Creating forms and surveys within the CareWorks system will make my job so much easier.**

Strongly Agree Agree Neutral Disagree Strongly Disagree

Please verify that your answers are final, and then click submit.

Cancel

Click on the preview tab to see how your form will look when published.

Form/Survey/Poll Link 

Sample for Training

Manage Form

Manage Questions

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Publish

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Submissions Graph

Choose site:

University Human Resources

Url:

```
http://www.oakland.edu/formbuilder  
/forms.aspx?formid=58028&sid=154
```

Content Page Code:

```
<iframe allowtransparency='allowtransparency'  
frameborder='0' width='100%' marginwidth='0'  
marginheight='0' src='/formbuilder  
/NoMasterForms.aspx?sid=154&formid=58028'  
id='iframe'></iframe>
```

Preview 

Click on publish tab to get a custom URL or HTML embed code to place the form on your page.

Form/Survey/Poll Results ?

Sample for Training

Manage Form

Manage Questions

Preview

Publish

Submissions

Submissions Graph

Question answer contains:

Submitter Name contains:

Date of Submission: Between

Questions:

Result options:

- Include Confirmation ID
- Include Submitted Date
- Include Name
- Include Email

Clear

Search

Export to Excel

Export to Word

Export to CSV

Export to PDF

Confirmation ID	Submitted Date	Name	Email
393-58028	5/27/2010 1:29:42 PM	Sample	joshua.austin@caretech.com
392-58028	5/27/2010 1:24:14 PM	Test	joshua.austin@caretech.com
391-58028	5/27/2010 1:20:40 PM	Test	joshua.austin@caretech.com
208-58028	2/18/2010 4:16:02 PM	Debbie Downer	downer@oakland.edu
207-58028	2/18/2010 4:15:35 PM	Jane Doe	doe@oakland.edu
206-58028	2/18/2010 4:15:17 PM	Joe Sample	sample@oakland.edu

Cancel

The submission tab gives you options on tracking the results of your form or survey. You can also export your collected data to several different formats outside of the CareWorks system.

Form/Survey/Poll Graph ?

Sample for Training

Questions must be of type Radiobutton, Dropdownlist or Checkbox in order to be graphed.

Manage Form

Manage Questions

Preview

Publish

Submissions

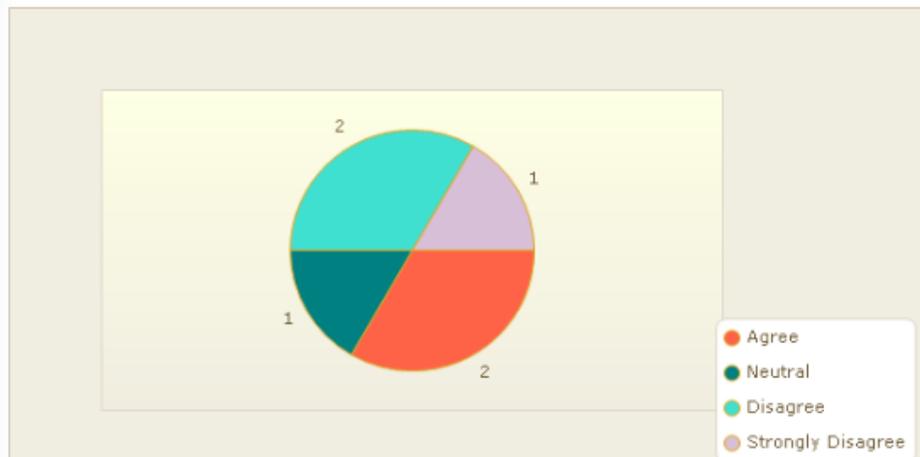
Submissions Graph

Chart Type:

- Pie
- Bar
- Area
- Bubble
- Gantt
- Line
- Point
- Spline

1. Creating forms and surveys within the CareWorks system will make my job so much easier.

Strongly Agree
Agree
Neutral
Disagree
Strongly Disagree



Click the Submissions Graph tab to see your collected data in a variety of different graphical formats.

Cancel ✕