schoolwires®

USER GUIDE

Forms & Surveys

Schoolwires® **Centricity**™

TABLE OF CONTENTS

Introduction

Forms & Surveys is an additional software option that enables you to create forms and surveys for your organization. If your organization has purchased this additional software option, this task will be active in the *Site Workspace* of Site Manager, the *Subsite Workspace* of Site Manager and the *Section Workspace* of Site Manager. Note that **Forms & Surveys** will be active in the *Section Workspace* only if it is activated by a Site Director or Subsite Director by modifying *section* options. See **Centricity** chapters, "Channel Workspace" and "Section Management" for more information.

Audience and Objectives

We recommend that Site Directors, Subsite Directors and Section Editors read this chapter.

In this chapter, you will learn how to:

- Design forms and surveys for your organization.

- Display forms and surveys on your website for completion by users.

- Develop and apply styles to enhance the look and feel of the forms and surveys you create.

- Create and maintain libraries of items (questions) for use on future forms and surveys.

- Use reports to view and manipulate the data collected in the forms and surveys you created.

Major Components of a Form or Survey

A form or survey is generally used to collect information. Its purpose can range from testing skill levels to conducting market research. Regardless of its purpose, however, it will consist of three major components that you can tailor to suit that purpose. These components are:

- *Style*: A style sets the colors and fonts for your form or survey. Each form or survey you create must be associated with a style. You may associate an unlimited number of forms or surveys with a single style. If you do not select a style, your form will be associated with the default style. Therefore, though you can edit it, you cannot delete the default style.

- *Items*: Items are the core of your form or survey. They represent the separate pieces of information you are attempting to collect. As you will see, *Manage Forms & Surveys* provides you with over 20 different types of items (most of these are question types) from which to choose. You may have an unlimited number of items on a form or survey.

- *Pages*: You may have an unlimited number of items, distributed among an unlimited number of pages on a form or survey. A form or survey should contain multiple pages if:
  - You want to limit the number of items you are presenting on each page (i.e., limit scrolling).
  - You want items (questions) to display based on a previous answer (e.g., you want users answering, "Yes" to Question #1 on Page 1 to be directed to Page 2, while those answering, "No," to skip to Page 3). You will use page conditions to accomplish this. These are covered later in this chapter.

Overview

The *Manage Forms & Surveys* task is administered through a series of tabs. As you can see by comparing Figures 1 and 2, some of these tabs are not available to Section Editors even when the *Manage Forms & Surveys* task has been enabled for their *sections*.

Figure 1: Manage Forms & Surveys tab in Section Workspace

Note: Notice the breadcrumb navigation just under the tabs. This enables you
to see the tab or page on which you are working and gives you an easy way to
get back. In this case, clicking on "Home" will take you back to the
Workspace. You will see this breadcrumb navigation throughout *Manage
Forms & Surveys.*

Figure 2: Manage Forms & Surveys tab in Site and Subsite Workspaces

The tabs and their functions are:

Manage Forms & Surveys

This tab is available to Site Directors, Subsite Directors and, if the
Manage Forms & Surveys task has been enabled for their *sections*, to
Section Editors. When they click on the *Manage Forms & Surveys* task in
their respective workspaces, it will always open on this tab. All the forms
or surveys created within that workspace will display on this tab. From
within this tab, they manage and edit their existing forms and surveys. In
addition, they can quickly analyze results and access reports.

New Forms/Surveys

This tab is available to Site Directors, Subsite Directors and, if the
Manage Forms & Surveys task has been enabled for their *sections*, to
Section Editors. On this tab, they title their new form or survey and decide
whether to create an entirely new form or survey or copy an existing form
or survey.

Item Libraries

This tab is available to Site Directors and Subsite Directors only. From
within this tab, they create libraries of items (questions) for use in future
forms and surveys. They also edit and manage item libraries within this
tab.

Styles

This tab is available to Site Directors and Subsite Directors only. From
within this tab, they set the style (colors and fonts) of forms and surveys.

There is no limit to the number of styles they can create. Each form and survey must be associated with a style. If a style is not set, the form or survey will be associated with the default style. The default style cannot be deleted, but it can be edited.

Reports

This tab is available to Site Directors, Subsite Directors and, if the *Manage Forms & Surveys* task has been enabled for their *sections*, to Section Editors. From within this tab, they can view and manage results and responses based on the forms and surveys they create.

Forms and Surveys Status

The status of a form or survey may change. It can be in one of three statuses:

- *Design*: This is the initial status that your form or survey will take when you create it. Generally it remains in this status until you are ready to make it *Active* and preview it. (See "Previewing Forms or Surveys" later in this chapter.)

  You can change the status from *Design* to *Active* by clicking in the checkbox at the far left of the form or survey using the *Options* button to the right of the form or survey.

- *Active*: You choose this status in order to:

  o Preview your form or survey. <u>Note</u>: There must be at least one item on your form or survey in order to preview it.

  o Allow your form or survey to be used.

  Before activating it for use, be certain to clear any test responses made during preview. Once you have obtained the desired responses or the allotted time period has elapsed, you can change the status to *Inactive* by clicking in the checkbox to the left of the status or using the *Options* button to the right of the title of your form or survey. See "How to Set the Options for a Form or Survey" later in this chapter.

- *Inactive*: You choose this status once you have obtained the desired number of responses or the allotted time period has elapsed. You can change the status back to *Active* by clicking in the checkbox on the far left of the form or survey or using the *Options* button to the right of the form or survey. See "How to Set the Options for a Form or Survey" later in this chapter.

Regardless of its status, if a form or survey has one or more responses on it (i.e., written to the database), you will be limited in the amount of editing you will be able to do. To fully edit a form or survey, click on the *Clear* button to the right of it. *This will delete all responses*.

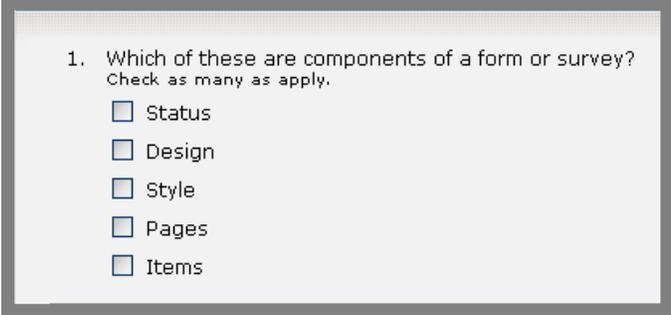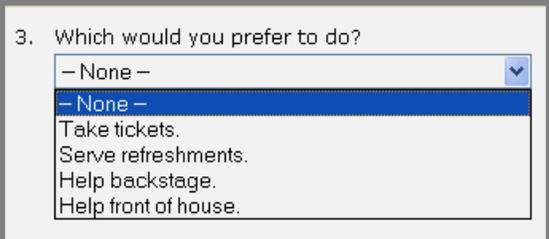# How to Create Your First Form or Survey
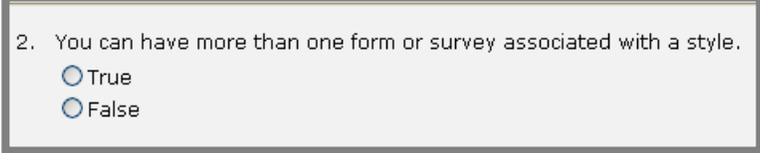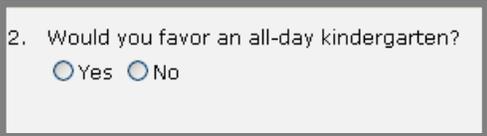
Item Types

Before you begin creating your first form or survey, you should be familiar with the item types that are available in *Manage Forms & Surveys*. Many item types are question types, while others can be used for formatting (e.g., presentation heading). Some item types support:

- Displaying answers to questions in random order.

- Assigning point values to answers.

Table 1 provides you with examples of most of the item types as well as the information on whether each item type supports random order of answers or assigning point values. Refer to this table throughout this chapter.

Table 1: Item Types

Item Type	Example or Requirements	Random Answers?	Point Values?
Database Drop-Down	To use this question type, all that is required is that the user enters a valid SQL statement and the database connection string. When using this question type, be extremely careful to ensure that the SQL entered will return results, and that the database connection information is valid. If either of these is incorrect, no data will be displayed. The SQL statement must contain two columns called "ItemValue" and "ItemDisplay". These two columns are used, respectively, as the value and the display text for each entry in the drop-down list. The correct way to make sure that your SQL contains columns with these two names is to use the "As" keyword in your SQL, as shown in the following example: SELECT state_code As ItemValue, state_name as ItemDisplay FROM tblState ORDER BY state_name If you wish to use the same column for both the value and text, simply select that column twice in your SQL statement, and alias it using the "As" keyword, as follows: SELECT state_code As ItemValue, state_code as ItemDisplay FROM tblState ORDER BY state_name The database connection string can be any valid DSN-less connection, or any valid DSN."	No	No

Item Type	Example or Requirements	Random Answers?	Point Values?
Choice-Multiple Answers (Checkboxes)	1. Which of these are components of a form or survey? Check as many as apply. ☐ Status ☐ Design ☐ Style ☐ Pages ☐ Items	Yes	Yes
Choice-One Answer (Drop-Down)	3. Which would you prefer to do? – None – ▼ – None – Take tickets. Serve refreshments. Help backstage. Help front of house.	Yes	Yes
Choice-One Answer (Option Buttons)	2. Let us know when you are available to help. ○ 9 a.m. to 11 a.m. ○ 11 a.m. to 1 p.m. ○ 1 p.m. to 3 p.m. ○ 3 p.m. to 5 p.m.	Yes	Yes
Choice-True/False	2. You can have more than one form or survey associated with a style. ○ True ○ False	No	No
Choice-Yes/No	2. Would you favor an all-day kindergarten? ○ Yes ○ No	No	No

Item Type	Example or Requirements	Random Answers?	Point Values?
Matrix-Multiple Answers per Row (Checkboxes)	2. You can answer as many times as you wish. Check as many as apply. Answer 1 / Answer 2 / Answer 3. Question 1. Question 2.	Yes	No
Matrix-Multiple Answers per Row (Textboxes)	2. List the names of all household members. Include anyone currently living in the house. Last Name / First Name / Relationship. Member One: Member Two: Member Three: Member Four:	Yes	No
Matrix-One Answer per Row (Option Buttons)	4. Rate your subjects. You can only choose one rating for each subject. Very Easy / Easy / Neutral / Difficult / Very Difficult. Math, English, Science, Physical Ed	Yes	No
Matrix-Rating Scale (Numeric)	3. Rate these after school activities* Use 1 if you seldom participate and 5 if you participate all the time. 1 / 2 / 3 / 4 / 5. Sports, Clubs, Volunteering, Lessons	Yes	No
Open Ended-Comments Box	6. Please tell us what you think.	No	No

Item Type	Example or Requirements	Random Answers?	Point Values?
Open Ended-Constant Sum	7. PLease enter your page totals. The sum of the numbers entered must equal 100. Page One Page Two Page Three	Yes	No
Open Ended-Date	8. Enter your birthday. mm/dd/yyyy	No	No
Open Ended-Number	9. What follows 999?	No	No
Open Ended-One Line	1. First Name* Please enter your first name.	No	No
Open Ended-One or More Lines	10. Tell us: Street Address: City: State:	Yes	No
Open Ended-Ranking	2. How would you rank the food in the cafeteria against the other two schools? Rank the items below, using numeric values starting with 1. HS MS El	Yes	No
Presentation-Heading	THIS IS A PRESENTATION HEADING	No	No

Item Type	Example or Requirements	Random Answers?	Point Values?
Presentation- Horizontal Rule	In the actual survey, the horizontal rule will be the full width of the survey. Preview the survey to see how the horizontal rule will actually be displayed.	No	No
Presentation- HTML	HTML **Enter the HTML.*** Use this field to enter any HTML and/or content. Text will be displayed using the HTML tags you enter. `<b>HTML</B>`	No	No
Presentation- Image	NONE	No	No
Presentation- Message	PLEASE HELP US SERVE YOU BETTER!	No	No

Creating Your First Form or Survey

The first time you use the *Manage Forms & Survey* task, you will begin with a blank form or survey.

To create an entirely new form or survey beginning with a blank form:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *New Form/Survey* button or the *New Form/Survey* tab. A *New Form/Survey* page like the one shown in Figure 3 will display.

Figure 3: New Form/Survey page

4. Enter a title for your form or survey. Make it descriptive and unique.

5. Click in the first radio button to *create entirely new form or survey*.

6. Click on the *Save* button. A page like the one shown in Figure 4 will display.
    At this point, this is your blank form/survey. What you have done is provide a
    title for your form or survey and indicate that you will be starting with a blank
    form/survey rather than copying an existing one.

    Note: As you can see, you are now working within the *Manage Forms
    Surveys* tab. You are essentially editing the new form or survey that
    you just created.

Figure 4: Blank page of your new form or survey

7. Click on the *Insert* button. An *Insert Item* page like the one shown in Figure 5
    will display.

Figure 5: Insert Item page

8. Choose an item (question or other item type) from the drop-down list. See
    Table 1 earlier in this chapter for examples and other information about these
    item types. The next page (*Edit Item*) that will display depends on the type of
    item you selected from the drop-down list.

9. Enter the required information on this page (*Edit Item*) for the item type you selected from the drop-down list.

10. Click on the *Save* button. Your form or survey will now display with the first item (question) entered. It will look something like the one shown in Figure 6. You have just saved that item to the database.

Figure 6: Form or survey with first item

11. Continue editing your form or survey to add more items (questions). See "How to Edit a Form or Survey" later in this chapter for more information.

12. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Manage Forms & Surveys* tab will display. The form or survey you just created will be on the list.

<u>Note</u>: Once you have created your first form or survey, for subsequent forms and surveys, you will be able to:

- Copy the entire form or survey.

- Copy items from the form or survey into another form or survey.

<u>Note</u>: You can also create an Item Library, a collection of items (questions) for use on future forms and surveys. You can share these libraries with other Site Directors, Subsite Directors and Sections Editors. See "Working with Item Libraries" later in this chapter for more information on how to create and manage Item Libraries.

Previewing a Form or Survey

In order to be previewed, a form or survey must:

- Have a status of *Active*.

    Note: If you have chosen "Manual Response Entry" as the *Respondent Access Level* for a form or survey, you will be able to preview it when it is *Inactive*. See "How to Set the Options on a Form or Survey" later in this chapter for more information on *Respondent Access Levels*.

- Have at least one item (question) on it.

To preview a form or survey:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the Manage Forms & Surveys task. A Manage Forms & Surveys tab like the one shown in either Figure 1 or 2 will display.

3. Check the Status column. If the Status is *Design*, click in the checkbox to the far left to activate it.

4. Click on the title of the form or survey.

5. Complete it as directed. The *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

    Note: You may need to refresh the website before the *Analyze* and *Clear* buttons and number of responses display next to the form or survey you just previewed.

Displaying Forms and Surveys on Your Website

Once you have created a form or survey, you can display it on your website using the full function **Editor**. This will give users access to the form or survey so they can complete it.

To display a form or survey, you can either:

- Insert a link to the form or survey into the content of your web page. Use the *Insert Forms Link* button that displays between the *Insert Link* and *Remove Link* buttons at the top of the **Editor**.

- Embed the URL for the form or survey into the content of your web page. Use **ActiveBlocks™** in the *Toolbox* on the full function **Editor**. Note: Choose "Embed Complex Content."

See **Centricity** chapter, "**Editor**," for more information.

How to Create Additional New Forms or Surveys

Once you have created your first form or survey, you have two options for creating additional forms or surveys. You may:

- Create a new form or survey beginning with a blank form; or,

- Copy an existing form or survey.

Beginning with a Blank Form

To create an additional new from or survey beginning with a blank form:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

3. Click on the *New Form/Survey* button or the *New Form/Survey* tab. A *New Form/Survey* page like the one shown in Figure 3 will display.

4. Enter a title for your form or survey. Make it descriptive and unique.

5. Click on the first radio button to *create an entirely new form or survey*.

6. Click on the *Save* button. A page like the one shown in Figure 4 will display. As before, this is your blank form or survey.

7. Click on the *Insert* button. An *Insert Item* page like the one shown in Figure 5 will display. Since you have created at least one other form, you now may either chose to:

   a. Select an item type from the drop-down list. (See Table 1 earlier in this chapter for examples and other information about these item types.) Or,

   b. Copy an item (question) from an existing form or survey.

8. If you select an item from the drop-down list, the next page (*Edit Item*) that will display depends on the type of item you selected from the drop-down list.

   a. Enter the required information on this page (*Edit Item*) for the item type you selected from the drop-down list.

   b. Click on the *Save* button. Your form or survey will display with the item (question) entered. It will look like the one in Figure 6. You have just saved that item to the database.

   c. Continue editing your form or survey to add more items (questions). See "How to Edit a Form or Survey" later in this chapter for more information.

   d. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Manage Forms & Surveys* tab will display. The form or survey you just created will be on the list.

9. If you want to copy an existing item, click on the *Copy Existing Item* button. A *Copy Existing Item* page like the one shown in Figure 7 will display.
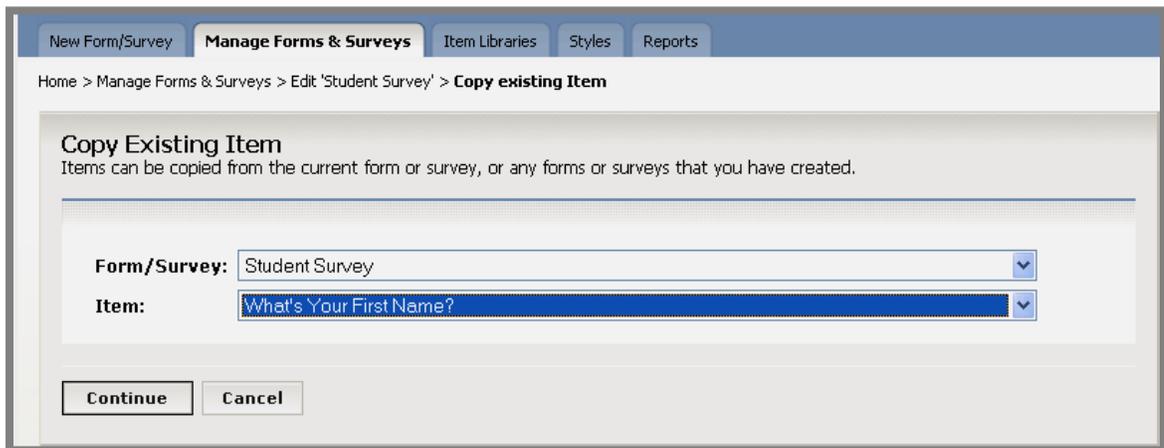
Figure 7: Copy Existing Item page

a. Select the form or survey from which you want to copy the item (question) from the top drop-down list.

b. Select the item you want to copy from the bottom drop-down list.

c. Click the *Continue* button. The item will display. Revise the required information for this item on this page (*Edit Item*).

d. Click on the *Save* button. Your form or survey will now display with the item (question) entered. It will look like the one in Figure 6. You have just saved that item to the database.

e. Continue editing your form or survey to add more items (questions). See "How to Edit a Form or Survey" later in this chapter for more information.

f. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Manage Forms & Surveys* tab will display. The form or survey you just created will be on the list.

10. If there is already at least one Item Library created that is shared, you may also choose to insert an item from an Item Library from the *Insert Item* page (like the one shown in Figure 5). Click in the *Insert from Library* button. An *Insert from Library* page like the one shown in Figure 8 will display.

Figure 8: Insert from Library page

   a. Select the Item Library from which you want to copy the item (question) from the top drop-down list.

   b. Select the item you want to copy from the bottom drop-down list.

   c. Click the *Continue* button. The item will display. Revise the required information for this item on this page (*Edit Item*).

   d. Click on the *Save* button. Your form or survey will now display with the item (question) entered. It will look like the one in Figure 6. You have just saved that item to the database.

   e. Continue editing your form or survey to add more items (questions). See "How to Edit a Form or Survey" later in this chapter for more information.

   f. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Manage Forms & Surveys* tab will display. The form or survey you just created will be on the list.

Copying an Existing Form or Survey

To copy an existing form or survey:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

3. Click on the *New Form/Survey* button or the *New Form/Survey* tab. A *New Form/Survey* page like the one shown in Figure 3 will display.

4. Enter a title for your form or survey. Make it descriptive and unique.

5. Click in the second radio button to *copy an existing form or survey*.

6. Choose the form or survey you want to copy from the drop-down list.

7. Click on the *Save* button. The form or survey you copied will display.

8. Continue editing your form or survey as required. See "How to Edit a Form or Survey" later in this chapter for more information.

9. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Manage Forms & Surveys* tab will display. The form or survey you just created will be on the list on the tab.

Using the Functions on the Manage Forms & Surveys Tab

The *Manage Forms & Surveys* tab is the core of this software option. When you click on the *Manage Forms & Surveys* task in your workspace, it will always open on this tab. From this tab, you can:

- Edit your forms and surveys.

- Set the options for your forms and surveys.

- Activate your forms and surveys.

- Analyze your forms and surveys.

As you can see from Figure 9, on this tab you will see the status, title and number of responses for each form or survey. You can sort the Status and Title columns by clicking on the column heads.

Figure 9: Manage Forms & Surveys tab

Buttons on the Manage Forms &Surveys Tab

As you can see, there are from three to five buttons to the right of each form or survey on the list. The *Edit*, *Options* and *Delete* buttons are always available for every form or survey.

However, the *Analyze* and *Clear* buttons will only be available if at least one response has been recorded and the status is set to Active. When you see these buttons, you will also see the number of responses in the Responses column. Clicking on the *Analyze* button will take you to a Results Overview for that form or survey. This is on the *Reports* tab. See "Working with Reports" later in this chapter for more information.

If you are in the Design status and have recorded at least one response, however, you will only see the *Clear* button. You will not see the number of responses nor will the *Analyze* button or any reports be available.

The *Delete* button will allow you to delete that particular form entirely. See "How to Delete a Form or Survey" later in this chapter for more information. Also see "How to Edit a Form or Survey" for more information on the use of

the *Edit* button; and "How to Set the Options on a Form or Survey" for more information on the use of the *Options* button.

The *New Form/Survey* button at the top of the *Manage Forms & Surveys tab* will take you to the *New Form/Survey* page where you can create a new form or survey by beginning with a blank form or by copying an existing form or survey as discussed in "How to Create Your First Form or Survey" and "How to Create Additional New Forms or Surveys" earlier in this chapter.

How to Edit a Form or Survey

When you are editing a form or survey, the way it appears when it opens will depend on how many pages it contains and how many items are on a page. For instance, when you first create a form or survey and insert your first item (question) on it, it will look something like the one in Figure 10.

Figure 10: Form or survey with first item

After you have added another item to your first page it will look something like Figure 11.
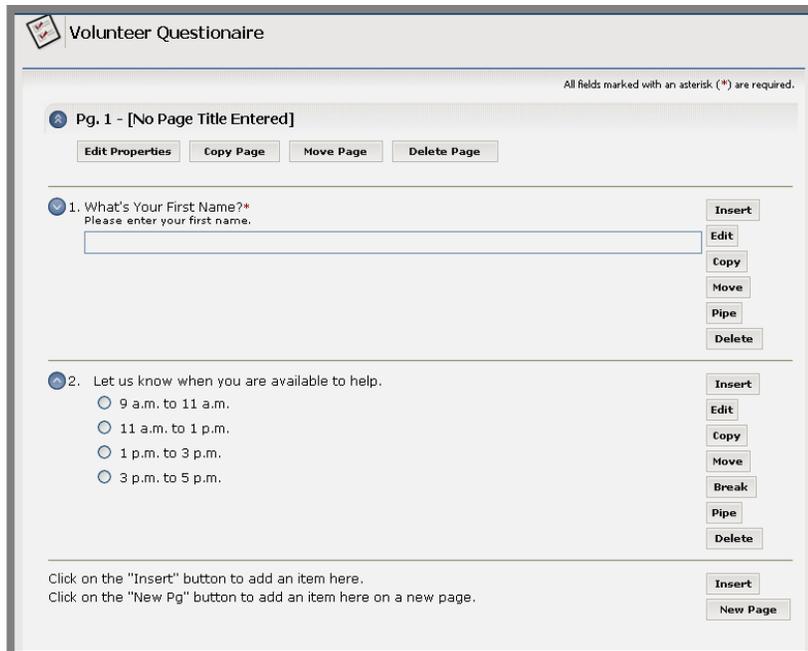
Figure 11: Form or survey with two items on first page

If you add subsequent pages your form or survey will look something like Figure 12 when you open it for editing. However, the first page will be open, displaying all the items on that page. Click on the double arrows to the left of the page numbers to open and close the pages.
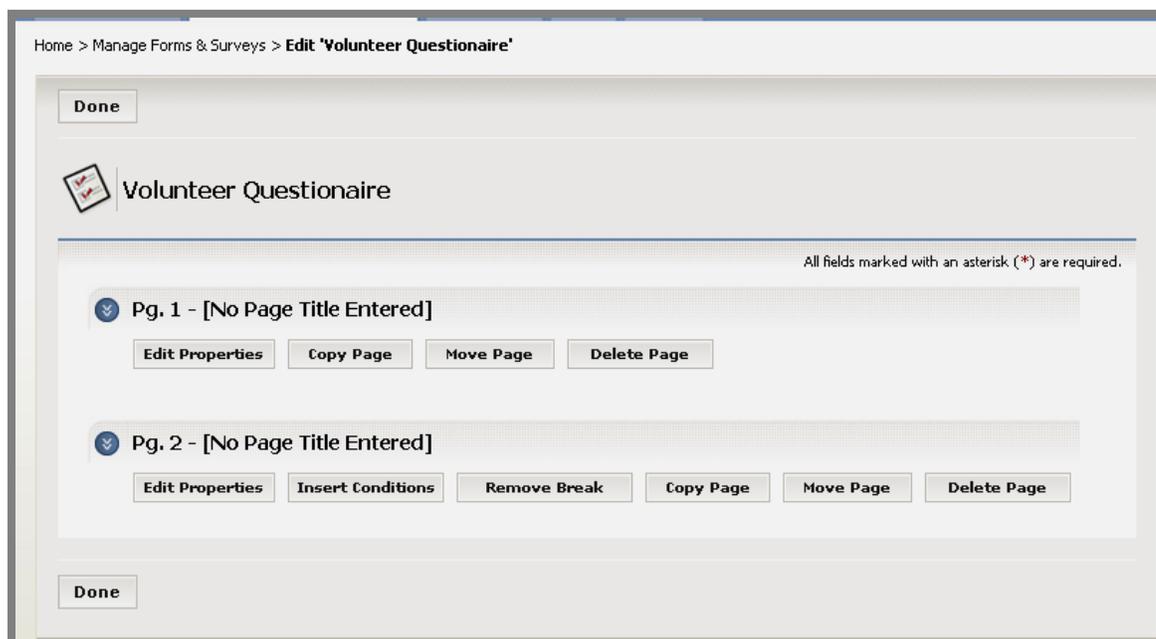
Figure 12: Multiple pages on form/survey; first page collapsed

Editing Actions (Buttons) Available for Pages

As you can see, when the pages are closed as they are in Figure 12, there are buttons under the page numbers and the page title.

Note: In Figure 12 no page title was entered for either page.

Notice that there are fewer actions (buttons) available on the first page than there are on subsequent pages. This is because some of the actions that are available on subsequent pages are dependent on the existence of at least one previous page.

The actions (buttons) available on the first page are:

- *Edit Properties*: Displays and allows you to edit:
  - Form/survey title (display only)
  - Page number (display only)
  - Page title
  - Page introduction
- *Copy Page*: Copies the current page along with all items and associated page conditions and inserts it immediately below the current page.

- *Move Page*: Moves the selected page to a different location. The selected page can be moved to any location in the form or survey.

- *Delete Page*: Deletes the page along with all items and associated page conditions.

The actions (buttons) available on subsequent pages include:

- All those available on the first page

- *Insert Conditions*: Enter page conditions to assist in data gathering and analysis. You can use page conditions to selectively display pages other than the first page to respondents on multi-page forms and surveys (e.g., you want users answering, "Yes" to Question #1 on Page 1 to be directed to Page 2, while those answering, "No," to skip to Page 3).

- *Remove Break*: Removes the page break above the page you are on.

Editing Actions (Buttons) Available for Items

Likewise, as you can see from Figures 10 and 11, the actions (buttons) available for the first item on a page differ from those available to subsequent items on a page. The editing buttons for items are displayed to the right of each of the items.

The actions (buttons) available on the first item are:

- *Insert* (above): Inserts an item above the current item.

- *Edit*: Displays the current item. You can edit it as required. If even one response to the form or survey has been recorded, you will be limited in the amount of editing you will be able to do. A message will display at the top of item stating this and directing you to clear the responses if you need to do more extensive editing.

- *Copy*: Copies the current item and inserts it immediately below.

- *Move:* Moves the selected item to a different location.

- *Pipe*: Displaying the answer to one question in the text of a subsequent question is called answer piping. For example, on the first page of your form or survey, you might ask the user for his/her name. If you want to begin a question on a subsequent page using the respondent's name, you would pipe the answer from the first question into the desired location on the subsequent page.

- *Delete*: Deletes the current item.

The actions (buttons) available on subsequent items on a page are:

- All those available for the first item

- *Break*: Inserts a page break above the current item.

In addition, you have these actions (buttons) available for items:

- *Insert* (at end): Inserts a new item at the end of the current page.
- *New Page*: Inserts a new item on a new page following the current page.

Editing a Form or Survey

To edit a form or survey:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

3. Click on the *Edit* button to the right of the form/survey you wish to edit. It will open.

   Note: If you just created a new form or survey and you are ready to continue adding new items (questions) to it, you will be at this window.

   Note: If even one response to the form or survey has been recorded, you will be limited in the amount of editing you will be able to do. A message will display at the top of the form stating this and directing you to clear the responses if you need to do more extensive editing. See Figure 13.

Figure 13: Form or survey with responses: limited editing

4. Use these buttons to edit *Pages* on a form or survey:

a. *Edit Properties*: Enter or change the page title and page introduction here. The page title and page introduction are optional. You may omit either or both of them on any page.

b. *Insert Conditions*: Enter page conditions to assist in data gathering and analysis. You can use page conditions to selectively display pages other than the first page to respondents on multi-page forms and surveys. That is, other than the first page in a form or survey, whether or not a respondent sees a subsequent page will be based on the page conditions associated with that page (e.g., you want users answering, "Yes" to Question #1 on Page 1 to be directed to Page 2, while those answering, "No," to skip to Page 3).

Note: If a page does not contain any page conditions, all respondents will see that page. If you want certain respondents to skip multiple pages, you must enter the same conditions on all the pages you want skipped.

c. *Remove Break*: Removes the page break above the page you are on. Removing the break also removes all the conditions for the page. If the preceding page has page conditions associated with it, those will now apply to the items below.

d. *Copy Page*: Copies the current page along with all items and associated page conditions and inserts it immediately below the current page.

e. *Move Page*: Moves the selected page to a different location. The selected page can be moved to any location in the form or survey. A drop-down list of the current pages in the form or survey will display. The page will move to the location before the page you select.

f. *Delete Page*: Deletes the page along with all items and associated page conditions.

5. Use these buttons to edit *Items* on a form or survey:

a. *Insert* (above): Inserts an item (question) above the current item. You may now insert an item by:

   i. Choosing one from the drop-down list.

   ii. Copying one from a form or survey that you created.

   iii. Inserting one from an item library.

b. *Edit*: Displays the current item. You can edit it as required. If even one response to the form or survey has been recorded, you will be limited in the amount of editing you will be able to do. A message will display at the top of item stating this and directing you to clear the responses if you need to do more extensive editing. See Figure 14.

Figure 14: Item with responses: limited editing

c. *Copy*: Copies the current item and inserts it immediately below.

d. *Move:* Moves the selected item to a different location. The selected item can be moved to any location in the form or survey.

   i. Click on the *Move* button. A *Move Item* page will display.

   ii. Choose the page location from the first drop-down list.

   iii. Choose the item location from the second drop-down list.

   iv. Click on the *Move* button. The item will move to the location before the page you select.

e. *Break*: Inserts a page break above the current item.

  f.   *Pipe*: When you click on the *Pipe* button, a dialog box like the one shown in Figure 15 will display.

      i.   Copy the text provided in the text box.

      ii.   Click the *Close* button.

      iii.   Paste the copied text into the desired location on the item (question) on a subsequent page. <u>Note</u>: You will need to edit that item (question).
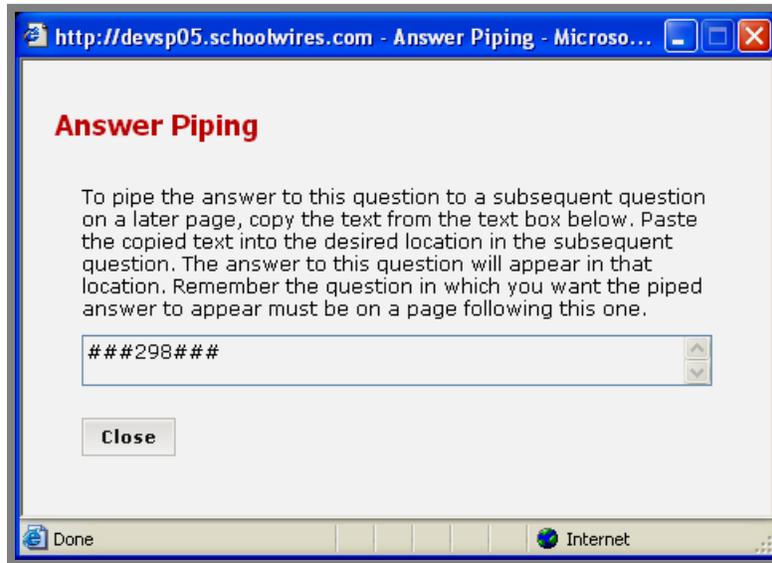
Figure 15: Answer Piping dialog box

  g.   *Delete*: Deletes the current item.

  h.   *Insert* (at end): Inserts a new item at the end of the current page. You may insert an item by:

      i.   *C*hoosing one from the drop-down list.

      ii.   Copying one from a form or survey that you created.

      iii.   Inserting one from an item library.

  i.   *New Page*: Inserts a new item on a new page following the current page. You may now insert an item by:

      i.   *C*hoosing one from the drop-down list.

      ii.   Copying one from a form or survey that you created.

      iii.   Inserting one from an item library.

<u>Note</u>: Use the arrows to the left of each item to move it up or down one place. Notice the arrows will not appear until you have at least two items on the page.

How to Set the Options on a Form or Survey

Each form or survey has options associated with it. To change any of these:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

3. Click on the *Options* button to the right of the form or survey whose options you want to change. The *Options* page for that form or survey will display. The *General Information* section will be open.

4. Click on the double arrow to the left of the desired section to open it. To close any section, click on the double arrow again.

5. The sections and what you control within each of them are:

   - *General Information*

     o <u>Title</u> of the form or survey: You can change the title as required.

     o <u>Style</u> associated with the form or survey: Each form or survey must be associated with a style. When you first design a form, it is automatically associated with the default style.

       <u>Note</u>: You can preview a style by clicking on the *Preview* button. You may choose a new style to apply to your form or survey from the drop-down list. Site Directors and Subsite Directors can modify styles and create new styles on the *Styles* tab. They may modify the default style, but they cannot delete it.

     o <u>Status</u>: You can change the status of your form or survey by selecting an option from the drop-down list. *When you first create a form or survey, the status defaults to Design.*

     o <u>Start Date</u>: You can enter a date in the future on which you will start to allow your form or survey to be used. *The default start is the date you create the form or survey.*

     o <u>End Date</u>: You can enter an end date for allowing the form or survey to be used. *The default is set for 30 days from the date you create the form or survey.*

     o <u>Date Created</u>: This is the date you first created the form or survey.

     o <u>Date Activated</u>: This is the date the form or survey was activated. This date will only appear if the form or survey has been activated (i.e., status set to "Active").

     o <u>Date Closed</u>: This is the date the form or survey was deactivated. This date will only appear if the form or survey has been deactivated (i.e., status set to "Inactive").

     o <u>Responses</u>: This is the number of responses to the form or survey, which only appears if applicable.

- *Respondent Access Levels*: In this section, you set:
  - How many times you will allow users to respond;
  - Whether they will need to login;
  - Whether or not they will be allowed to update their previous responses.

  The default Respondent Access Level is "Multiple Response, Anonymous Access Allowed - (Not Updateable)."

- *Survey Completion Options*: In this section, you can set the action you desire once a user completes the form or survey. Once you choose the action, you will need to enter the information required for that action. From a drop-down list, you can choose to:
  - Display a message.
  - Display results.
  - Direct respondents to a URL.
  - Close the browser.
  - Send responses to an email address.

  The default Survey Completion Options are to display a thank you message and the Close button.

- *Navigation Options*: In this section, you can select whether or not you wish to display a *Back* button on your form or survey and what action you desire when the user clicks the *Cancel* button.

  The default Navigation Options are to display a Back button and to close the browser when the user clicks the Cancel button.

- *Configure Hidden Fields*: In this section, you can configure hidden fields if you wish to use them within your form or survey.

  There are no hidden fields configured when you first create a form or survey.

- *IP Address Validation*: In this section, you can limit the respondents to a form or survey to those with access to computers with IP addresses within a set range.

  There are limitations on IP addresses configured when you first create a form or survey.

- *Numbering Options*: In this section, you can set how to display page and item numbers within your form or survey.

  By default, progress through a form or survey will be shown as a progress bar and the items (questions) will be numbered within the form or survey.

- *Administrative Options*: In this section, you can set administrative options including:

    o Maximum Reponses: Enter the maximum number of responses allowed to your form or survey. Leave this blank to allow an unlimited number of responses. *This is blank by default.*

    o Responses per User: **This is only for forms or surveys allowing multiple responses per user**. Enter the maximum number of responses allowed per user. Leave this blank to allow an unlimited number of responses. *This is blank by default.*

    o Days for Update: **This is only for forms or surveys allowing users to update their responses**. Enter the number of days during which respondents may update their responses. *This is set at 30 days by default.*

- Contact Information: In this section, you can enter additional form or survey owners and their email addresses.

How to Delete a Form or Survey

To delete a form or survey:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in either Figure 1 or 2 will display.

3. Click on the *Delete* button to the far right of the form or survey you want to delete. A dialog box like the one shown in Figure 16 will display.
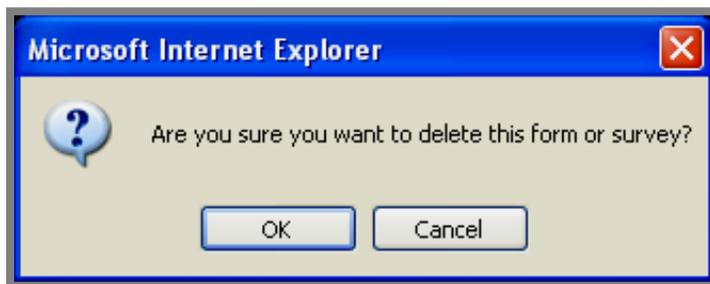

Figure 16: Delete dialog box

4. Click on the *OK* button. The *Manage Forms & Surveys tab* will display. The form or survey you deleted will no longer be on the list.

Working with Item Libraries

Item Libraries are collections of items (questions) that you can insert into a form or survey. You can create a question once in a library and then reuse it over and over again. You might create a library of field trip permission slip questions, for instance, or one of survey questions for parents.

When you click on the *Item Libraries* tab, as you can see from Figure 17, a list of current libraries will be displayed. That list will contain any libraries that you have created. In addition, if you are a Site or Subsite Director, you will see all the Item Libraries for your *site* or *subsite*. Section Editors do not have access to the Item Library tab so they cannot create or modify any item libraries. However, they can copy items from an Item Library that is shared.

Each one of the columns on the *Item Libraries* tab may be sorted by clicking on the column title. You may delete an *Item Library* by clicking on the *Delete* button on the far right. See "How to Delete an Item Library" later in this chapter for more information.

Figure 17: Item Libraries tab

How to Create a New Item Library

To create a new Item Library:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Item Libraries* tab. An *Item Libraries* tab like the one shown in Figure 17 will display.

4. Click on the *New Item Library* button. A *New Item Library* page like the one shown in Figure 18 will display.

Figure 18: New Item Library page

5. Enter a name for the Item Library. Be sure it is unique and descriptive.

6. From the drop-down list, select "Yes" or "No" for whether the library will be active.

    Note: If you make an Item Library "Active," you will immediately be able to copy items (questions) from it into forms and surveys. However, others will not be able to copy items from it until you also make it "Shared." If you do not make it "Active," you will still be able to edit it. *The default setting for "Active" is "Yes."*

7. From the drop-down list, select "Yes" or "No" for whether the library will be shared.

    Note: If you make an Item Library "Shared," others will be able to copy items (questions) from it into forms and surveys. It must also be "Active." *The default setting for "Shared" is "No."*

8. Click on the *Save* button. An *Edit* page like the one shown in Figure 19 will display.

Figure 19: Edit page

9. Click on the *Insert* button. An *Insert Item* page like the one shown in Figure 20 will display.

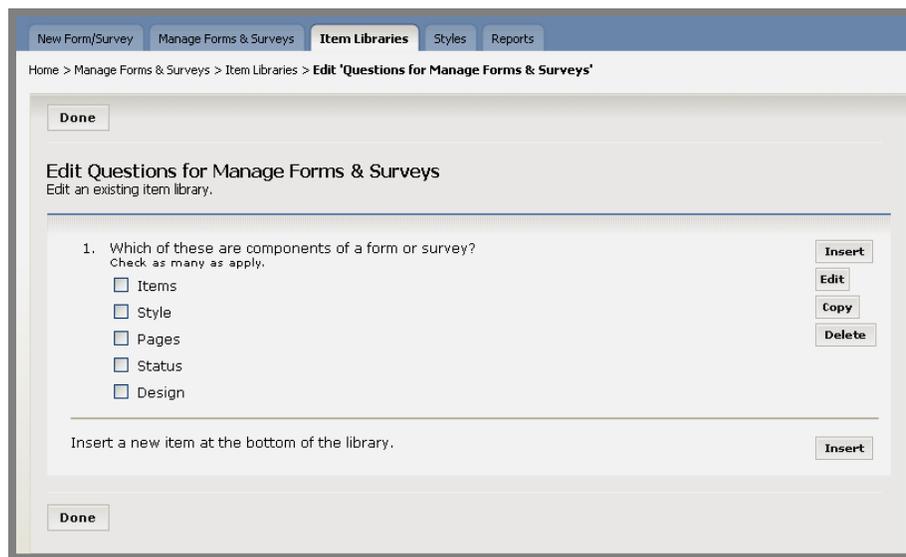**Figure 20: Insert Item page**

10. To insert an item in an Item Library, you may choose to either:

   a. Select an item from the drop-down list. (See Table 1 earlier in this chapter for examples and other information about these item types.) Or,

   b. Copy an item from an existing form or survey.

11. If you select an item from the drop-down list, the next page (*Edit Item*) that will display depends on the type of item you selected from the drop-down list.

   a. Enter the required information on this page (*Edit Item*) for the item type you selected from the drop-down list.

   b. Click on the *Save* button. Your Item Library will display with the item (question) entered. You have just saved that item to the database.

   c. Continue editing your Item Library to add more items (questions). See "How to Edit an Item Library" later in this chapter for more information.

   d. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Item Libraries* tab will display. The Item Library you just created will be on the list.

12. If you want to copy an existing item, click on the *Copy Existing Item* button. A *Copy Existing Item* page like the one shown in Figure 7 will display.

   a. Select the form or survey from which you want to copy the item (question) from the top drop-down list.

   b. Select the item you want to copy from the bottom drop-down list.

c. Click the *Continue* button. Your Item Library will display with the item (question) entered. You have just saved that item to the database.

d. Continue editing your Item Library to add more items (questions). See "How to Edit an Item Library" later in this chapter for more information.

e. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Item Libraries* tab will display. The Item Library you just created will be on the list.

How to Edit an Item Library

To edit an Item Library:

1. Access the appropriate Workspace in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in Figure 2 will display.

3. Click on the *Item Libraries* tab. The *Item Libraries* tab (Figure 17) will display.

4. Click on the *Edit* button to the right of the library you wish to edit. The library will display. Figure 21 is an example of an Item Library containing one item.

Figure 21: An Item Library containing one item

5. To edit your Item Library you will use the following buttons:

   a. *Insert* (above): To insert an item (question) above this item in the Item Library. When you click on this button, you may choose to either:

      i. Select an item from the drop-down list. (See Table 1 earlier in this chapter for examples and other information about these item types. and "How to Create a New Item Library," Step 11.) Or,

      ii. Copy an item from an existing form or survey. (See "How to Create a New Item Library," Step 12.)

   b. *Edit*: To edit the item. When you click on this the *Edit* page for that type of item will display.

      i. Make the required changes to the item (question).

      ii. Click on the *Save* button. The Item Library will display.

      iii. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Item Libraries* tab will display.

c. *Copy*: To copy the item and insert it immediately below.

   i. Click on the *Copy* button. The duplicate item will appear immediately below the current item.

   ii. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Item Libraries* tab will display.

d. *Delete*: To delete the item from the Item Library.

   i. Click on the *Delete* button. A dialog box will display.

   ii. Click on the *OK* button. The item will be removed from your Item Library.

   iii. Click on either of the two *Done* buttons (top or bottom left) when you are finished. The *Item Libraries* tab will display.

e. *Insert* (bottom): To insert an item at the bottom of the Item Library. When you click on this button, you may choose to either:

   i. Select an item from the drop-down list. (See Table 1 earlier in this chapter for examples and other information about these item types and "How to Create a New Item Library," Step 11.) Or,

   ii. Copy an item from an existing form or survey. (See "How to Create a New Item Library," Step 12.)

Note: Use the arrows to the left of each item to move it up or down one place. Notice the arrows will not appear until you have at least two items on the page.

How to Set Options on an Item Library

To set the options on an Item Library:

1. Access the appropriate Workspace in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Item Libraries* tab. The *Item Libraries* tab will display.

4. Click on the *Options* button to the right of the desired library. The *Options* page will display.

5. Change the title and whether the library is Active or Shared as required. Notice that the date this Item Library was created also displays on this page.

6. Click on the *Save* button. The *Item Libraries* tab will display.

How to Delete an Item Library

To delete an Item Library:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Item Libraries* tab. The *Item Libraries* page will display.

4. Click on the *Delete* button to the far right of the Item Library you wish to delete. A dialog box like the one shown in Figure 22 will display.
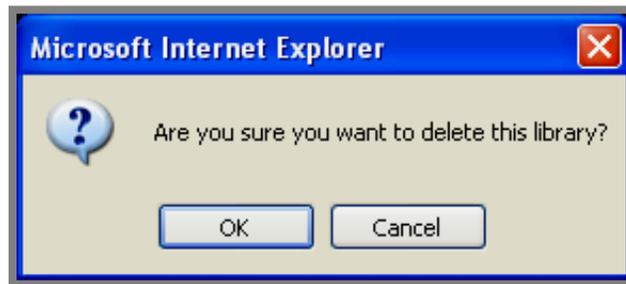

Figure 22: Delete dialog box for Item Library

5. Click on the *OK* button. The *Item Libraries* page will display. The Item Library you deleted will no longer be on the list.

Working with Styles

You use styles to define the colors and fonts for your forms and surveys. There is no limit to the number of styles a Site Director or Subsite Director may create. Each form or survey must be associated with a style, and any number of forms and surveys can be associated with a single style. You will edit the styles here, but you apply them to a particular form or survey on the *Options* page of that form or survey. See "How to Set the Options on a Form or Survey (General Information)" earlier in this chapter for more information.

<u>Note</u>: If you decide to edit a style, remember that it will change the style of all the forms and surveys currently associated with it.

Figure 23: Styles tab

Each one of the columns on the *Styles* tab may be sorted by clicking on the column title. You may delete a style by clicking on the *Delete* button on the far right. If a style does not have a *Delete* button, it is the default style. You cannot delete this style. However, you may edit it. See "How to Delete a Style" later in this chapter.

You can see how your survey will look with the style applied by clicking on the *Preview* button to the right of the style. You can return from the preview by clicking on any of the buttons in the preview pane.

How to Create an Entirely New Style

You can create an entirely new style by beginning with a blank style palette or by copying an existing style.

To create an entirely new style:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys* tab like the one shown in Figure 2 will display.

3. Click on the *Styles* tab. A *Styles* tab like the one shown in Figure 23 will display.

4. Click on the *New Style* button. A *New Style* page like the one shown in Figure 24 will display.

Figure 24: New Style page

5. Enter a title for your style. Be sure it is descriptive and unique.

6. Click on the first radio button to *create entirely new style*.

7. Click on the *Save* button. An *Edit Style* page like the one shown in Figure 25 will display. The *General Information* section will be open and the others will be closed. Clicking on the double arrows to the left of the section names will open and close them.

Figure 25: Edit Style page

8. Enter the required information for your style on the following sections:

   a. *General Information*: There are three pieces of required information in this section:

      i. Style Name

      ii. Whether you want the Style to be *Active*

          Note: If you make a Style "Active," you will immediately be able to apply it to forms and surveys. However, others will not be able to apply it until you also make it "Shared." If you do not make it "Active," you will still be able to edit it. *The default setting for "Active" is "Yes."*

      iii. Whether you want the Style to be *Shared*

          Note: If you make a Style "Shared," others will be able to apply it to forms and surveys. It must also be "Active." *The default setting for "Shared" is "No."*

   b. *Borders and Colors*

   c. *Font Styles*

   d. *Header and Footer*

   e. *Form/Survey Navigation*

9. Click on the *Save* button. The *Styles* tab will display. The style you created will be on the list.

How to Copy an Existing Style

To copy an existing style:

1. Access the appropriate Workspace in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Styles* tab. The *Styles* tab (Figure 23) will display.

4. Click on the *New Style* button. The *New Style* page (Figure 24) will display.

5. Enter a title for your style. Be sure it is descriptive and unique.

6. Click in the second radio button to *copy an existing style*.

7. Select a style from the drop-down list.

8. Click on the *Save* button. The *Edit Style* page (Figure 25) will display.

9. Change the information for your style on the following sections as required:

   a. *General Information*

   b. *Borders and Colors*

   c. *Font Styles*

      d.   Header and Footer

      e.   Form/Survey Navigation

10. Click on the *Save* button. The *Styles* tab (Figure 23) will display. The style you created will be on the list.

How to Edit a Style

To edit a Style:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Styles* tab. The *Styles* tab (Figure 23) will display.

4. Click on the *Edit* button to the right of the style you want to edit. The *Edit Style* page (Figure 25) will display.

5. Change the information for your style on the following sections as required:

      a.   *General Information*

      b.   *Borders and Colors*

      c.   *Font Styles*

      d.   *Header and Footer*

      e.   *Form/Survey Navigation*

6. Click on the *Save* button. The *Styles* tab (Figure 23) will display.

How to Delete a Style

To delete a Style:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in Figure 2 will display.

3. Click on the *Styles* tab. The *Styles* tab (Figure 23) will display.

4. Click on the *Delete* button to the right of the style you want to edit. A dialog box will display.

5. Click on the *OK* button. The *Styles* tab (Figure 23) will display. The Style you deleted will no longer be on the list.

Working with Reports

From the *Reports* tab, you can:

- View the overall results;
- View individual results;
- Manage filters for reports;
- Export data from the form or survey;
- Share results with others without granting them access.

Types of Reports and How to View Them

To view the results of a form or survey:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)
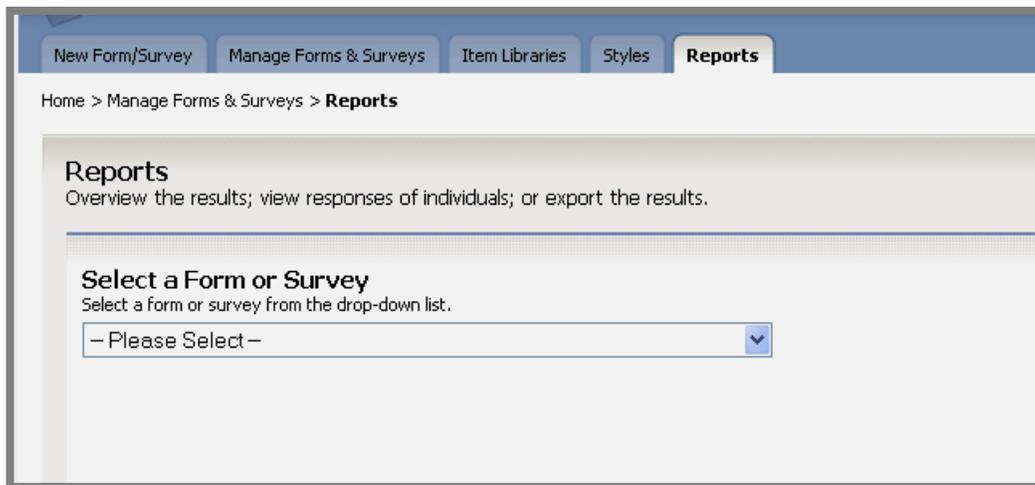
Figure 26: Reports tab

4. Select the desired form or survey from the drop-down list. The *Reports* tab will populate with the available data for the form or survey you selected (Figure 27).
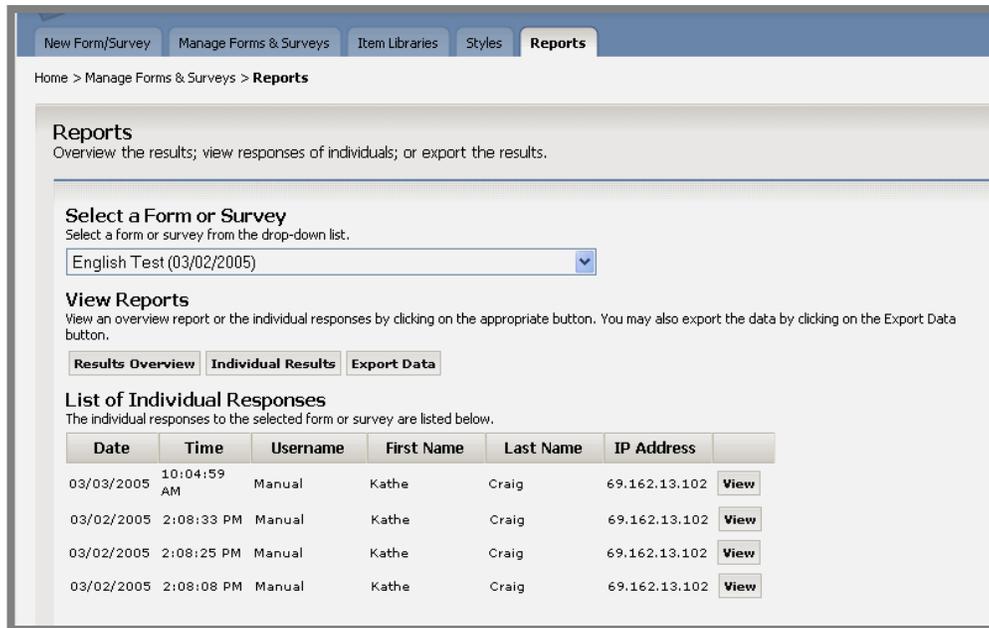
Figure 27: Reports tab populated with data from selected form or survey

5. To view the overall results, click on the *Results Overview* button on the *Reports* tab. (See Figure 27.) A report showing total number and percentages of responses for each item on the form or survey will display.

6. To view individual responses, click on the *Individual Results* button on the *Reports* tab. (See Figure 27.) This will take you to the first response to the survey. You can use the arrows on the upper right of that response or enter a number to view other responses.

7. As you can see from Figure 27, the individual responses are also listed on the populated *Reports* tab. You can click on the *View* button to the right of each of the responses to view it immediately. You can use the arrows on the upper right of that response or enter a number to view other responses.

How to Manage Report Filters

You can limit the set of responses in reports based on custom filter criteria by using report filters. For example, if a survey contains a question asking users if they will graduate this year, you could create a report filter to only display the responses where the user answered "Yes" to this question. There are three types of report filters: date, question and user attribute.

To manage report filters:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)

4. Select the form or survey from the drop-down list. The *Reports* tab will populate with the available data from the form or survey you selected. (See Figure 27.)

5. Click on the *Results Overview* button. A report showing total number and percentages of responses for each item on the form or survey will display.

6. Click on the *Manage Filters* button. A *Manage Filters* page like the one shown in Figure 28 will display. When it first displays, no filters will show. Once you enter filters, the fields that display depend on the filter type you choose:

    a. Date.

    b. Question.

    c. Attribute.

Figure 28: Manage Filters page

7. Insert, edit, activate and delete filters as required.

    Note: If you enter a filter and then deselect the *Active* box on that filter, the filter will not be in effect until you select *Active* again. *The default for a filter is "Active."*

8. Click on the *Save All* button. The report will display showing the number of filters next to the *Manage Filters* button.

How to Share Reports

You can share the results of your survey with others who do not have access to *Manage Forms & Surveys*. They do not even have to have access to your website. With a Report Share, you can share Overview reports only. *Report Sharing is disabled by default.*

To create a Report Share:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)

4. Select the form or survey from the drop-down list. The *Reports* tab will populate with the available data from the form or survey you selected. (See Figure 27.)

5. Click on the *Results Overview* button. A report showing total number and percentages of responses for each item on the form or survey will display.

6. Click on the *Report Sharing* button. The *Report Sharing* page will display. Current Report Shares for that survey will display.

Figure 29: Report Sharing page

7. Click on the *New Report Share* button. An *Insert Report Share* page like the one shown in Figure 30 will display.

Figure 30: Insert Report Share

8. Specify the email addresses to which the Report Share should be sent.

9. Specify whether the Report Share will be Active. If it is Active, you will be able to send it from the *Report Sharing* page. (See Figure 29.)

10. Click on the *Save* button. The *Report Sharing* page will display. (See Figure 29.) The new Report Share will be on the list.

Once a report share has been created, you can send it to the recipients from the *Report Sharing* page.

How to Send a Report Share

To send a Report Share:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)

4. Select the form or survey from the drop-down list. The *Reports* tab will populate with the available data from the form or survey you selected. (See Figure 27.)

5. Click on the *Results Overview* button. A report showing total number and percentages of responses for each item on the form or survey will display.

6. Click on the *Report Sharing* button. The *Report Sharing* page will display. (See Figure 29.) Current Report Shares for that survey will display.

7. Click on the *Send* button to the right of the Report Share you want to send. A *Send Report Share* page will display. (See Figure 31.)

Figure 31: Send Report Share page

8. Enter the information for the message.

9. Click on the *Send* button. A confirmation message will display.

10. Click the *OK* button. The *Report Sharing* page (Figure 29) will display. The date the Report Share was sent will display in the Sent Date column.

How to Export Report Data

Data from the selected form or survey will be exported in CSV (Excel) format. Standard question and answer data is always exported for each report.

To export report data:

1. Access the appropriate Workspace in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)

4. Select the form or survey from the drop-down list. The *Reports* tab will populate with the available data from the form or survey you selected. (See Figure 27.)

5. Click on the *Results Overview* button. A report showing total number and percentages of responses for each item on the form or survey will display.

6. Click on the *Export Data* button. An *Export Data* page like the one shown in Figure 32 will display.

Figure 32: Export Data page

7. Click on the appropriate radio button to select a data format.

8. Click in the desired checkboxes if you wish to include additional Response and User Data information. A dialog box will display.

9. Click on the *Save* button and save the file. Once it is finished downloading, the *Export Data page* will display.

10. Click on the *Cancel* button. The populated *Reports* tab will display.

How to Delete a Report Share

To delete a Report Share:

1. Access the appropriate *Workspace* in **Site Manager**.

2. Click on the *Manage Forms & Surveys* task. A *Manage Forms & Surveys tab* like the one shown in either Figure 1 or 2 will display.

3. Click on the *Reports* tab. The *Reports* tab will display. (See Figure 26.)

4. Select the form or survey from the drop-down list. The *Reports* tab will populate with the available data from the form or survey you selected. (See Figure 27.)

5. Click on the *Results Overview* button. A report showing total number and percentages of responses for each item on the form or survey will display.

6. Click on the *Report Sharing* button. The *Report Sharing* page will display. Current Report Shares for that survey will display.

7. Click on the *Delete* button to the right of the Report Share you want to delete. A dialog box will display.

8. Click on the *OK* button. The *Report Sharing* page will display. The Report Share you deleted will no longer be on the list.