Forms & Surveys

Blackboard Web Community Manager
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This guide covers all available features and functionality. Features included in your contract may vary.
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Introduction

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

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

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

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

Access the Site Workspace Forms & Surveys

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

1. In Site Manager, navigate to the Site Workspace.
2. Click the Tools tab. A menu of tools displays.
3. Click Forms & Surveys. The Forms & Surveys window displays.
4. Manage forms and surveys as desired.

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

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

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

![Tools Menu with Forms & Surveys Highlighted](image)

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

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

![Common Tools Dashboard with Forms & Surveys Highlighted](image)
Access the Channel Workspace Forms & Surveys

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

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

3. Click Forms & Surveys. The Forms & Surveys window displays.
4. Manage forms and surveys as desired.
Access the Section Workspace Forms & Surveys

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

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

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

You can also click Forms & Surveys under the Common Tools dashboard on the Summary tab in the Section Workspace.
Create a Form or Survey

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

Create a New Form or Survey from Scratch

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

1. In Site Manager, navigate workspace to which you wish to create your form or survey.
2. Navigate to the Tools tab and click Forms & Surveys.
3. Click New Form/Survey. The Create Survey window will display.
4. Enter a name for your form or survey.
5. Create from scratch is the default option.
6. Click **Save**. You are returned to the Forms & Surveys Workspace.

![Create Survey](image)

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

![Forms & Surveys](image)
Copy a Form or Survey
Here’s how you copy a form or survey.

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

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

4. Enter a name for your form or survey.
5. Select Copy an existing form/survey.
6. Select the form or survey you wish you copy from the Form/Survey drop down.
7. Click **Save**. You are returned to the Forms & Surveys Workspace.

![Create Survey](image)

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

![Forms & Surveys](image)
**Import a Form or Survey**

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

Here’s how you import Forms & Surveys.

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


4. On the *Forms & Surveys* tab, click *Import Form/Survey*.
5. Locate and select the Forms & Surveys compressed export file.
Insert Items to a Form or Survey

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

Insert a New Item

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

1. In Site Manager, navigate workspace to which you wish to create your form or survey.
2. Navigate to the Tools tab and click Forms & Surveys.
3. Click on the name of the form or survey you wish to edit.
4. Click **Insert**. The Create New Item window displays.

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

6. Enter the required information for the item. Required fields will have a red triangle in the upper right hand corner.
7. Click **Save**. Your item is inserted.

![Create New Item](image)

**Question**

Enter the question. Use the field to enter the text for your question or input prompt.

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

Enter the sub-text. Enter informational or additional text to display below the question.

**Validation Options**

- **Required.** Check this box if an answer to this question is required.
- **Default value.** This value will be selected as the default for this question:
  - **None**
- **Display type.** Select the format for the response to the True/False question:
  - **Drop Down**

8. You can continue to insert new items two ways.
   
   a. Click **Insert** beside an item you already created. If you choose this method, you will be inserting an item above the current item.
   
   b. Click **Insert** at the bottom of the window. If you choose this method, you will be inserting an item below the last item on the page.
Copy an Existing Item

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

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

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

4. Click Insert. The Create New Item window displays.
5. Click **Copy Existing Item**. The Copy Item window displays.

![Copy Item Window](image1.png)

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

![Modify Item Window](image2.png)
7. Edit the item as needed.

8. Click **Save**. Your item is inserted.
Add an Item from an Item Library

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

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

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

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

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

6. Select the item you wish to insert and click Continue. The Modify Item window displays.
7. Edit the item as needed.

8. Click **Save**. Your item is inserted.
Manage Pages in a Form or Survey

You can create multiple pages within a form or survey.

Insert a New Page in a Form or Survey

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

1. In Site Manager, navigate workspace to which you wish to create your form or survey.
2. Navigate to the Tools tab and click Forms & Surveys.
3. Click on the name of the form or survey you wish to edit.
4. In your form or survey navigate to where you wish to insert a new page.
5. Click New Page to insert a new page after the page you are currently on.
6. You can also click the More drop down next to an item and select Break to add a page break above that item.
Copy a Page in a Form or Survey

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

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

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

4. In your form or survey navigate to the page you wish to copy.
5. Click Copy Page. The page is copied.
Delete a Page in a Form or Survey

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

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

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

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

5. Click Delete Page. A confirmation dialog displays.
6. Click OK. Your page is deleted and you are returned to your form or survey in Edit Mode.
Edit Properties for a Page in a Form or Survey

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

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

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

4. Once finished, click Save. You are returned to your form or survey in Edit Mode.
Set Forms & Surveys Options

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

General Tab

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

![General Tab Image]
Display Tab

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

**Style:**
Set the look and feel of your form/survey by selecting a style.

- Default Template

**Page Numbering:**
Display progress as a progress bar

**Question Numbering:**
Number questions within entire survey

**Survey Navigation Buttons**

- **Back Button:** Display
- **Save Button:** Display
- **Cancel Button:** Close browser

**Cancel Button URL:**
Enter the web address for the Cancel button (if set to redirect to custom URL).
Access Tab

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

Forms & Surveys Respondent Access & Submission Levels

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

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

- **Single Response Updateable.** This option permits respondents to complete a form or survey only once but they are able to return to the form or survey to update previously submitted data.

- **Single Response Not Updateable.** This option permits respondents to complete a form or survey only once but they are unable to return to the form or survey to update previously submitted data.

- **Single Response Resumable.** This option permits respondents to return to a form or survey which they have started in order to complete it.

- **Multiple Responses Not Updateable.** This option permits respondents to complete multiple instances of a form or survey. Respondents cannot update prior responses.

- **Multiple Kiosk Not Updateable.** This option permits the use of a bank of designated workstations for the completion of a form or survey. The data submitted cannot be updated by respondents.

- **Manual Multiple Response Entry.** This option allows for the continuous entry of previously collected data (e.g., pencil and paper responses) into a form or survey so that the data is stored electronically and can be exported or shared with others.
Completion Tab

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

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

Advanced Tab

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

Access Durations for Forms & Surveys

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

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

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

Session Time Out for Forms & Surveys

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

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

View a Form or Survey

Here’s how you view a form or survey.

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

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

Locate the Link a for Form or Survey

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

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

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

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

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

   <a href="//c2.tc.schoolwires.net/cms/module/selectsurvey/TakeSurvey.aspx?SurveyID=nnn" target="_blank">Click here to take the survey</a>

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

Map a Page to Forms & Surveys

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

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

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

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

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

4. Click **Save**. The **Summary** tab of the Channel Workspace displays.
Publish Forms & Surveys in a Link Library

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

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

6. Click Save. The link to the Form or Survey is added to the Link Library App and you are returned to the workspace.
Publish Forms & Surveys in a Site Shortcuts App

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

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

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

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

Analyze Form or Survey Responses

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

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

1. Click on the Reports tab in the Forms & Surveys window.
2. Select the desired form or survey from the drop-down list.
3. View individual responses by clicking on Individual Responses. You can also access an individual response by clicking View next to the response record.
4. View the overall results by clicking on Results Overview button.
   a. Choose data to display in the Results Overview window by selecting a choice from the Display drop-down menu.
b. Click on More to Manage Filters and Share Results.

i. Click on Insert Filter to specify the data for which you are filtering. You may insert more than one filter. Uncheck the box next to the filter to de-activate it.

ii. Report Sharing allows you to specify those with whom you would like to share Overview Results. You can share reports with others who do not have access to Forms & Surveys.

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

**Export Responses from Forms & Surveys**

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

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

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

6. **From the Results Overview window, export Data by clicking Export Data.** Data will be exported to a CSV file.
   a. **Choose** the Data Format option that you desire. Be sure to think about the question types that appear in your form or survey. For example, if you have used an Open-Ended multiple line item type, you may want to choose SPSS (Statistical Package for the Social Sciences) format in order to put each line of data into its own column.
   b. **Click** the desired checkboxes if you wish to include additional fields of response, user data or both. The Username will display when exported regardless of whether you check the box or not.
   c. **Click on Export Data** at the bottom of the window. You will be prompted to save or open the results file.

**Clear Form or Survey Responses**

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

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

2. **Type ‘CLEAR’ and click Confirm to clear all responses for your form or survey.**
Edit a Form or Survey

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

Edit a Form or Survey

Here’s how you edit a form or survey.

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

2. Make desired changes.

Edit an Item in a Form or Survey

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

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

3. Make desired changes.

4. Click Save.
Move an Item in a Form or Survey

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

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

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

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

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

Here’s how you export a form or survey.

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

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

Here’s how you delete a form or survey.

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

5. Type ‘DELETE’ and click Confirm to delete your form or survey. You are returned to the Forms & Surveys Workspace.
Forms & Surveys Recommended Practices

Here are some recommended practices for Forms & Surveys.

- For each type of question, you can choose whether to make the item required. Users will not be able to complete the form without answering those specific questions.
- Be sure not to create too many items on one page. Add multiple pages to minimize scrolling. Users will be able to click next to view your additional pages/items.
- When using piping, you must put the piped answer on a subsequent page.
- You must change the status of the form to Active to allow data to be entered and recorded.
- You may not make extensive edits to a form without first clearing responses. If you need to retain the data, export it before you edit the form.