

TEXAS A&M AGRILIFE EXTENSION SERVICE

Tech Tuesday

Microsoft Forms

September 27, 2022

Presented by Lori Martin
District 1 Office Manager

Please go to <https://office.com> and login with Agnet credentials

User Name - first.last@agnet.tamu.edu

Password - your Agnet password

9:41

Microsoft Forms Survey

Hi, Lori. When you submit this form, the owner will see your name and email address.

* Required

1. Have you used Microsoft Forms? *

☐ Yes

☐ No

2. If you answered "yes" to question 1,

Suggested Uses for Microsoft Forms



Registration (Forms creates spreadsheet for you)

Interactive polls during Teams meetings

Order forms

Customer ID setup

Fee based program report

Inventory surplus request

Satisfaction surveys

Training needs assessment

Meeting or lunch availability

Microsoft Forms Survey

Hi, Lori. When you submit this form, the owner will see your name and email address.

* Required

1. Have you used Microsoft Forms? *

☐ Yes

☐ No

2. If you answered "yes" to question 1, how have you used Microsoft Forms?

☐ Registration

☐ Merchandise (shirt) order

☐ Survey for available dates

☐ Skills assessment to plan for learning session

☐ Pre or post survey

☐ Interactive question during training

Learning Objectives

Demo various uses of MS Forms

- Registration
- Surveys
- Interactive survey during meetings

Create a MS Form

- Use Microsoft Forms online template for starting place
- Create from scratch

QR Codes

Use the embedded brand fonts and colors throughout your presentation for best results.

Microsoft Forms Training

Tech Tuesday | September 27, 2022

Lori Martin | District 1 Office Manager

1. How can you use Forms?

- a. Registrations
- b. Meeting availability polls (easier than Doodle polls) – respondents view results after submission
- c. Email and Teams short polls
- d. Fee based program report
- e. Inventory surplus requests from counties
- f. Pre-training skills assessment and interest survey
- g. Post-training survey | customer satisfaction
- h. Engage audience during trainings with survey questions
- i. Quizzes to prep 4-H competition teams (livestock skill-a-thon)
- j. Shirt order

2. Benefits and ease of use

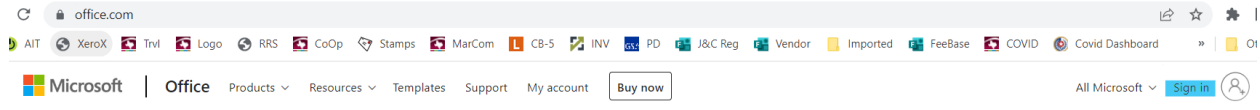
- a. Results automatically tabulated in Excel spreadsheet that can be used for mail merges (name tags, registration lists, CEU lists, etc.), and to tabulate needed information for any event
- b. Share Form via link, QR Code or insert in a Team window
- c. Mobile friendly
- d. Copy form to reuse for new conference or share with another person
- e. Interactive with real time results using charts, graphs, and spreadsheets
- f. Easily collaboration with others

3. Best practices

- a. Sketch out your form first - think about what information you need to learn and how you want the information arranged
- b. Do not share the link or QR Code until you have completed all edits
- c. Options for creating longer Forms:
 - i. Online templates at Microsoft Office (login with Agnet credentials to access premium templates)
 - ii. Create online by logging into Office 365 (SharePoint) with Agnet credentials
- d. Options for creating shorter Polls using Forms:
 - i. Email poll
 - ii. Teams poll

CREATE FROM SCRATCH – OFFICE 365 (SHAREPOINT)

- Go to <https://office.com>
- Click Sign In at the top right of the screen



- Sign-in using your Agnet credentials:
User ID: first.last@agnet.tamu.edu
Password: Agnet password
Duo Mobile verification



← lori.martin@agnet.tamu.edu

Enter password

Password

[Forgot my password](#)

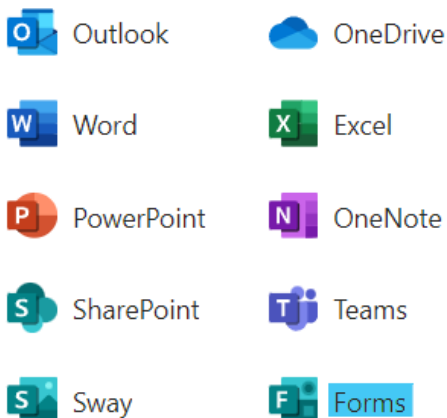
Sign in

- You are now logged into Texas A&M AgriLife SharePoint
- Click grid in upper left toolbar

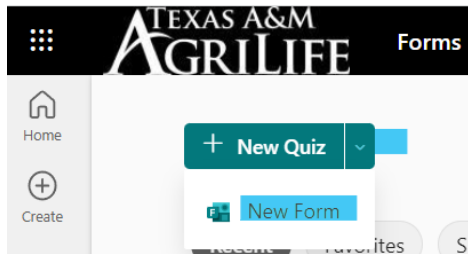


- Select FORMS from the Apps

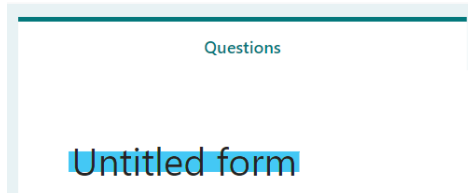
Apps



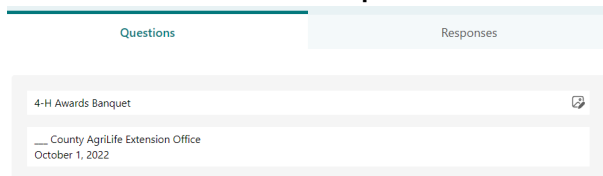
- In the upper left window, click the arrow next to the NEW QUIZ button and select NEW FORM



- Click into the field named “Untitled form” and enter the title for your new form



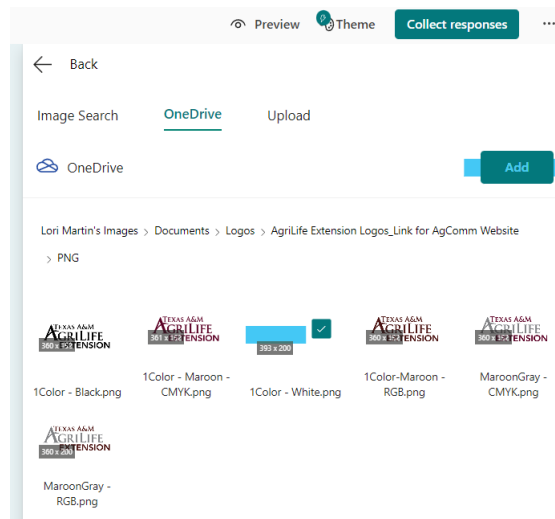
Your title goes in the upper field and more information about your event goes in the lower “form description” field



- To add the AgriLife Extension logo in the title
 - Click the image icon in the title section



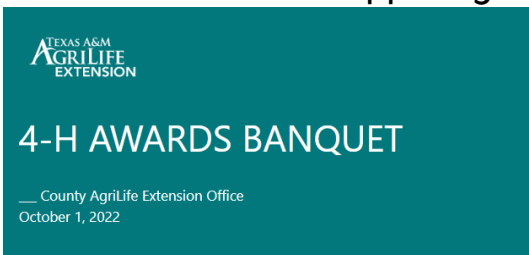
- A new window pops up to the right
 - Click OneDrive or Upload (depending on where your logo is stored)
 - Find your image
 - Click on the image you want to add to the title section (choose PNG if possible so the image will not have a white box around the logo)
 - Click the ADD button



- You will now see your logo above the title box



- Click PREVIEW in the upper right toolbar to preview the title section



- Click BACK in the toolbar to return to your form for editing



- To begin adding questions, click the + ADD NEW button (if you want to see suggested questions, click the lightning bolt next to the button)



- Choose whether your question will be a:
 - Choice (multiple choice)
 - Text (indicate short or long response)
 - Rating (i.e., star rating after training for good to bad rating)
 - Date
 - Ranking (preference rating – most wanted to least favored)

- Linkert (inserts a table)

- Net Promoter Score

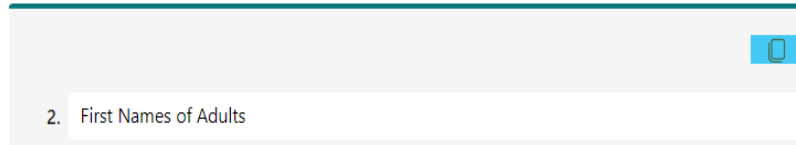
- Section (a new group of questions)
 - Add Questions
 - For Question 1, choose “Text” enter the text “Family Last Name”
 - Under the field boxes, toggle the “Required” slider

[+ Insert new](#) [🔗](#)

- Click + ADD NEW to add Question 2 and repeat the steps to add questions for First Names of Adults; in the lower tools, click the “more actions (...)” and select Subtitle

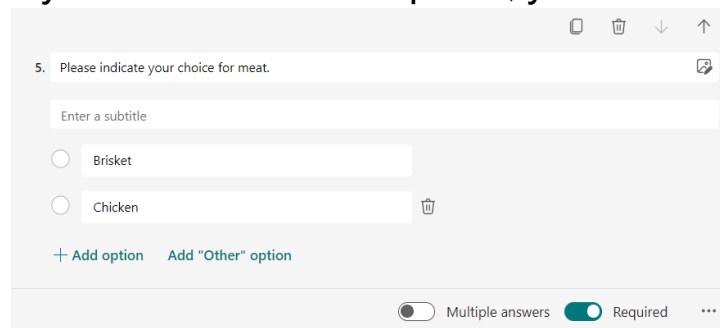
In the subtitle box, type the text, “Enter names of adults, separated by columns”

- In the upper tools of Question 2, click the copy icon to copy Question 2 and edit it to make Question 3.



2. First Names of Adults

- Edit Question 3 to change the word “Adults” to “Children” in the title and subtitle fields; change the slider to “Long Answer” in case there are a lot of children.
- Click + ADD NEW to add Question 4, and choose TEXT.
Type the text “Enter the total number of people attending from your family” in the title field.
- On Question 5, select CHOICE
 - In the title field, type “Please indicate your choice for meat.”
 - For Choice 1, type “Brisket”
 - For Choice 2, type “Chicken”
 - If you had more than 2 options, you can click + Add Option



5. Please indicate your choice for meat.

Enter a subtitle

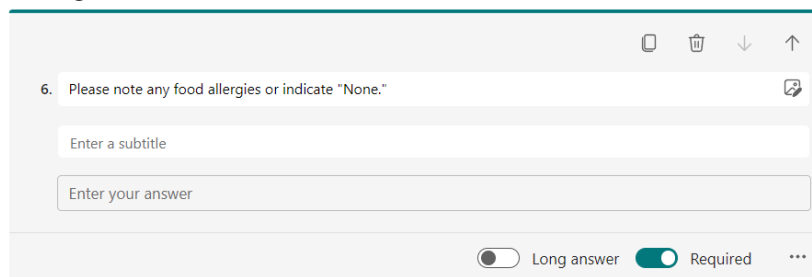
☐ Brisket

☐ Chicken

+ Add option Add "Other" option

☐ Multiple answers ☒ Required ...

- For Question 6, add a long text question, “Please note any food allergies or indicate ‘None’”



6. Please note any food allergies or indicate "None."

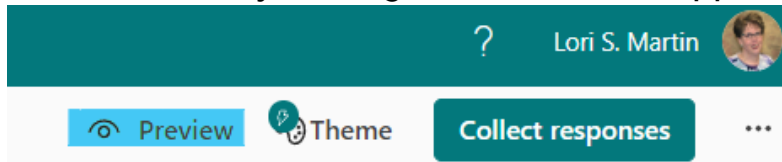
Enter a subtitle

Enter your answer

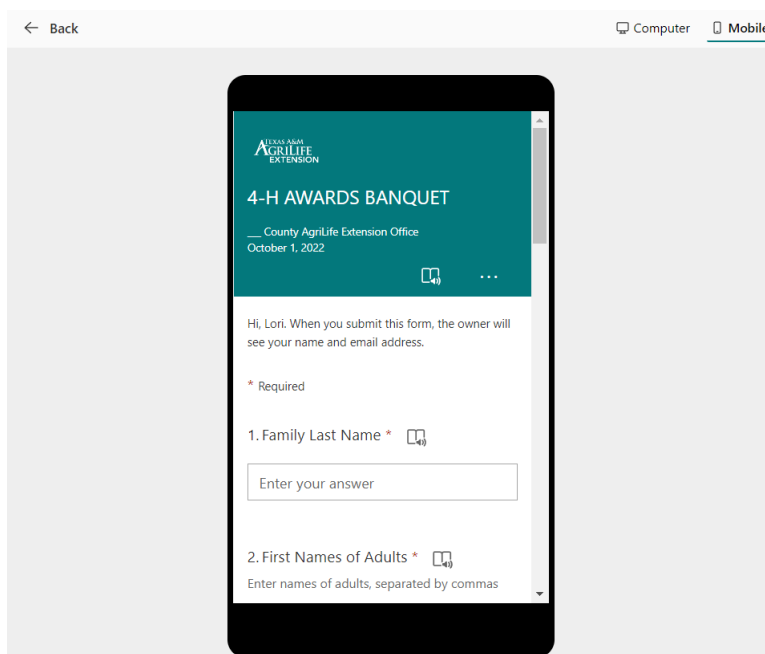
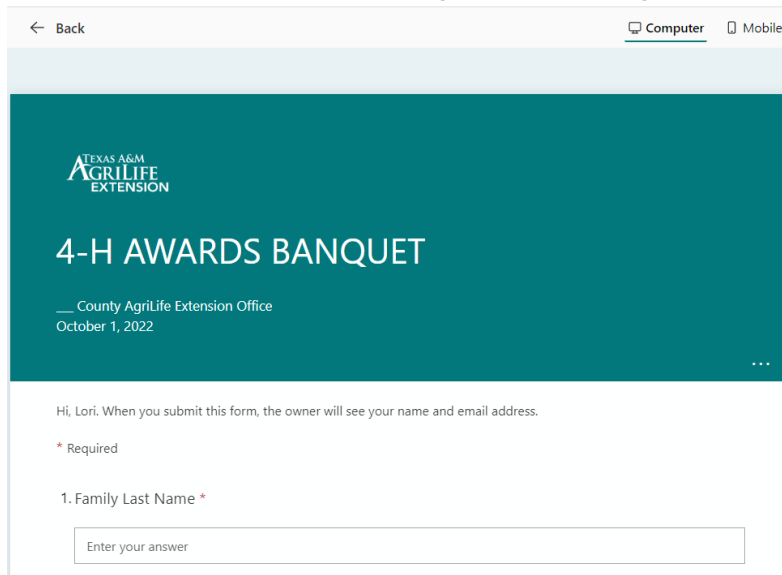
☐ Long answer ☒ Required ...

- For Question 7, add a short text question titled, “Please enter your email address.”
- For Question 8, add a short text question titled, “Please enter your cell phone number.”
- For Question 9, enter a choice question titled, “Please indicate whether you prefer to be contacted by email or text.”

- Preview Form by clicking PREVIEW in the upper right toolbar.

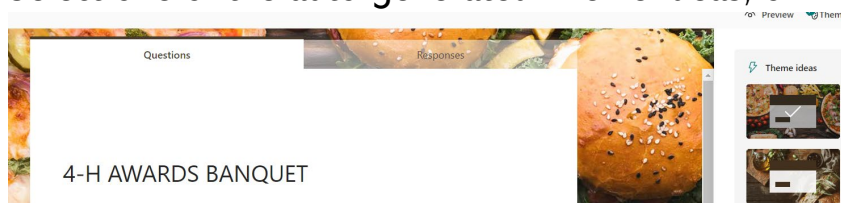


- You will see the preview as it looks on a computer screen, or you can click the Mobile button in the top toolbar to preview in the mobile phone setting.



- If you are satisfied with the default “look” shown on the preview, then you can move forward to the settings (see below). For purposes of this training, we will provide instructions to change the theme and colors.
- Click the BACK button to go from the preview screen to the editing screen.
- Click the THEME button in the upper right toolbar. A new pop-up will show theme ideas. You can select one of the theme ideas or customize your own.
- To customize your theme

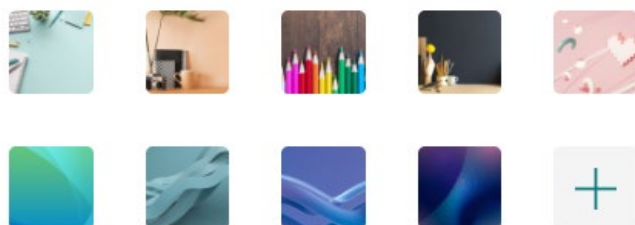
- Select one of the auto-generated Theme Ideas; or



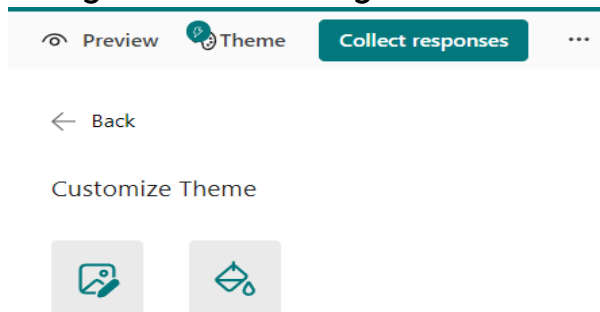
- Select a color or icon to change from the default teal background to a color of your choice; or



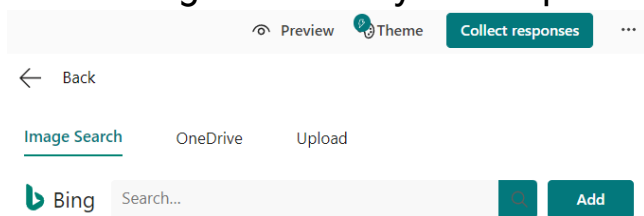
- Select one of the suggested icons below the solid colors; or
- Click the \pm icon in the lowest right of the theme ideas to choose your own colors and image



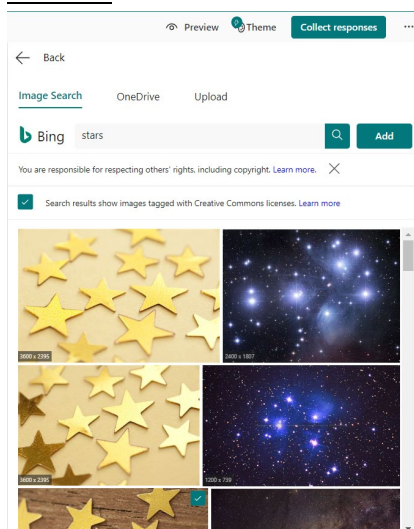
- In the Customize Theme window, you will select an image for the background and change the theme color to match your image.



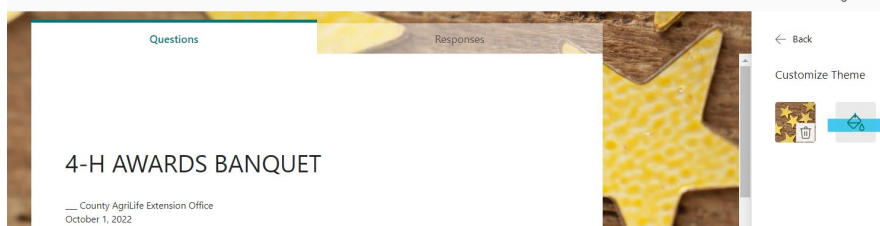
- Click the left button to select an image. You can do an online search or use an image stored on your computer.



- To look at online photo options, type “stars” in the search bar and hit **ENTER**.



- Click on an image to select and click the ADD button to see how it looks as a background. For this purpose, choose the stars with the wood background.
- You will now see the background on your form editing screen.
- Click the icon to choose a theme color and we will change the teal to black to coordinate with the chosen background image.



A popup will appear for the Hex #. Enter the color code Hex # for the color you want for the form to coordinate with the background image. Enter 000000 (six zeros) for the Hex # to change to black. In the preview of the right pane, the new colors show as a small preview.

← Back

Customize Theme



Hex #000000



- To find hex numbers:
 - Open a Word blank document
 - Click the arrow next to the font color choice
 - Click More Colors under the color previews
 - Change from Standard to Custom on the color wheel
 - Find the color you want
 - The Hex # appears in the boxes under the color choices
 - Copy the Hex # and paste into the Customize Theme window in Forms.
- Click the PREVIEW button. If you want to make edits, click the BACK button, and follow the steps above to make desired changes.
- For training purposes, the black theme looks too dark, so click BACK and go to the theme, click the edit button at the bottom, far right and change the Hex # to 744D26.

TEXAS A&M
 AGRILIFE
 EXTENSION

4-H AWARDS BANQUET

___ County AgriLife Extension Office
October 1, 2022

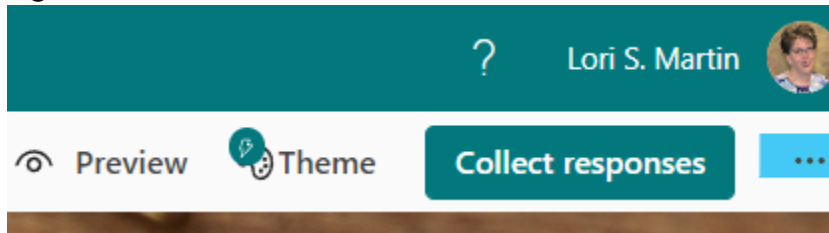
Hi, Lori. When you submit this form, the owner will see your name and email address.

* Required

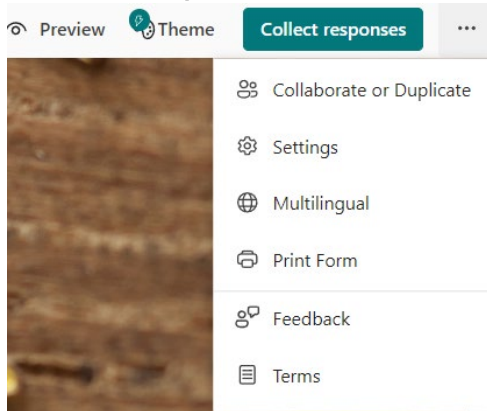
1. Family Last Name *

Enter your answer

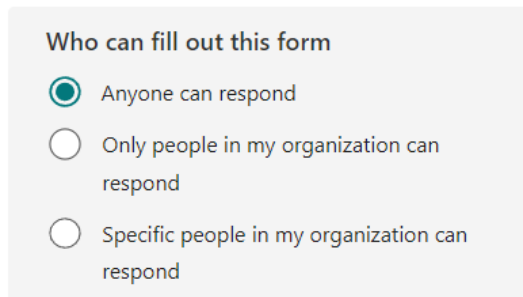
- When you are satisfied with the look of the form and all of the questions you want to use are included, click the “More Actions (...)” button in the upper right toolbar.



- Available options are shown below



- If you want to collaborate with another person or duplicate the form to be used by someone else, select Collaborate or Duplicate.
- Click Settings
 - In the box “Who can fill out this form?” click “Anyone can respond.”



- In the box “Options for Responses” click the appropriate boxes.
 - To begin accepting responses now, click “Accept Responses”
 - To accept responses with a start and/or end date, click those boxes and enter the dates (important for registration cut-off)
Note: If you do not enter an end date, you can always edit the form and uncheck the “Accept Responses” box when you want registration to end.
 - Leave unchecked the following boxes:
 - Set time duration
 - Shuffle questions
 - Show progress bar

- Check the box “Customize thank you message” and type the message you want users to get when they complete the form.

Options for responses

☒ Accept responses

☐ Start date

☐ End date

☐ Set time duration ⓘ

☐ Shuffle questions

☐ Show progress bar ⓘ

☒ Customize thank you message

Thank you for registering for our Awards Banquet. If you plans change, please contact our office at 123.456.7890.

- In the box “Response Receipts” click the desired boxes:
 - “Allow receipt of responses after submission” will give the user a copy of their responses.
 - “Get email notification of each response” will send an email to the creator of the form each time a response is received.

Response receipts

☒ Allow receipt of responses after submission

☒ Get email notification of each response

☐ Get smart notification emails to track the response status ⓘ

- In the upper right toolbar, click the COLLECT RESPONSES button.

Preview Theme **Collect responses** ...

- In the “Send and Collect Responses” window
 - Click the box for “Shorten URL”
 - Click the COPY button to copy the shortened URL
 - Paste the URL in your own email to invite responses

Send and collect responses

Anyone can respond ✓

<https://forms.office.com/r/viqh7Wq89s> **Copy**

☒ Shorten URL

- If you want to share the Form by Email to one of our Email Groups by Invitation, enter the names or group names you want to share with via Outlook and click SEND

This screenshot shows a 'Send' dialog box for an email group. At the top, there is a header bar with a blue circle containing the letter 'E', followed by the text 'EXT - D1 County Support Staff' and a close button (X). Below this is a light gray message box containing the text: 'You are invited to complete 4-H AWARDS BANQUET, which will only take 5 minutes to complete. Please submit your response by 9/28/2022. Thank you!'. Underneath the message box are two options: 'Outlook' with a checked checkbox and 'Teams' with an unchecked checkbox. A green 'Send' button is located at the bottom right of the dialog.

- If you want to share the Form to a Team by Invitation, you can enter the name of the Team and click SEND.

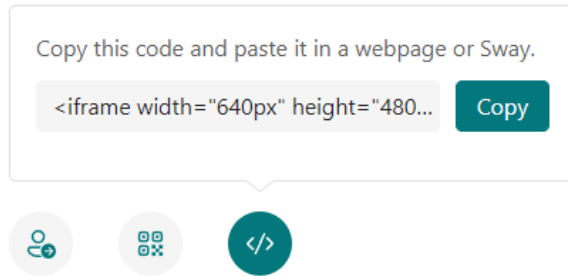
This screenshot shows a 'Send' dialog box for a Teams chat group. The header bar features a Teams icon, the text 'Team - District 1 Support Staff', and a close button (X). The message box contains the same invitation text as the previous screenshot: 'You are invited to complete 4-H AWARDS BANQUET, which will only take 5 minutes to complete. Please submit your response by 9/28/2022. Thank you!'. Below the message box, a status message reads: 'ⓘ Existed chat group not found. A new chat group will be created for the message.' Underneath this are two options: 'Outlook' with an unchecked checkbox and 'Teams' with a checked checkbox. A green 'Send' button is at the bottom right.

***Forms can be shared to Teams and create a tab at the top of the Team window for more permanent Forms that will remain in the Team.

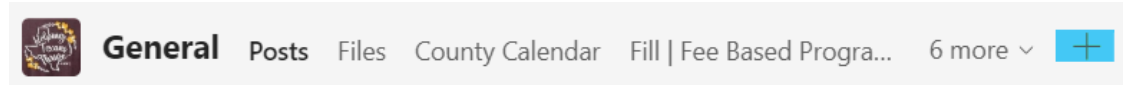
- To generate a QR Code, click the QR Code icon at the bottom of the “Send and Collect Responses” window and download the QR Code.

This screenshot shows the 'Send and collect responses' window. At the top, there is a navigation bar with three tabs: 'Preview', 'Theme', and 'Collect responses' (which is active). Below the tabs, the title 'Send and collect responses' is displayed. Underneath, it says 'Anyone can respond' with a dropdown arrow. A URL is shown in a text box: 'https://forms.office.com/Pages/ResponseP...', followed by a 'Copy' button. Below the URL, there is a checked checkbox for 'Shorten URL'. The main content area contains a message: 'Recipients can scan the code on a phone or tablet to access the form.' To the right of this message is a large QR code. Below the QR code is a green 'Download' button. At the bottom of the window, there are three icons: a share icon, a QR code icon (which is highlighted with a speech bubble), and a code editor icon.

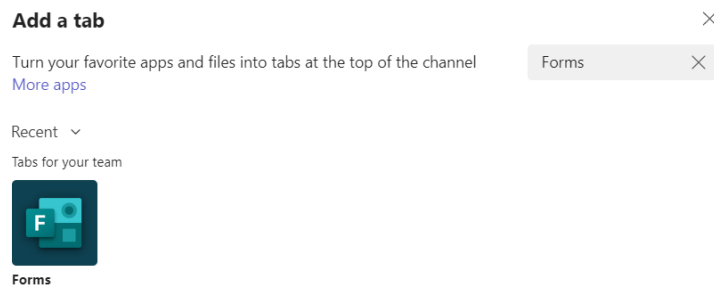
- To copy a code to paste in a webpage, click the `</>` icon and COPY



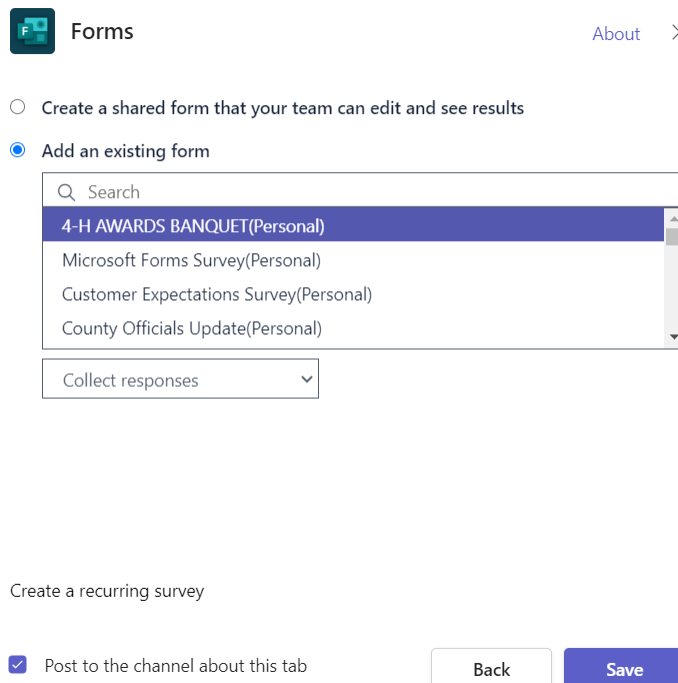
- To insert the Form as a tab at the top of a Team:
 - In Teams, click the “+” button at the top to add a tab



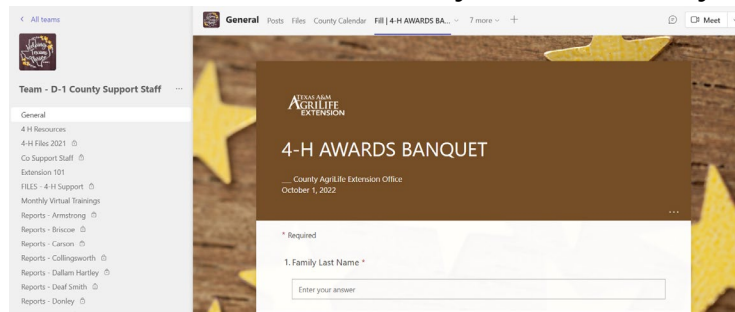
- In the Search box, type “Forms” and click the Forms icon.



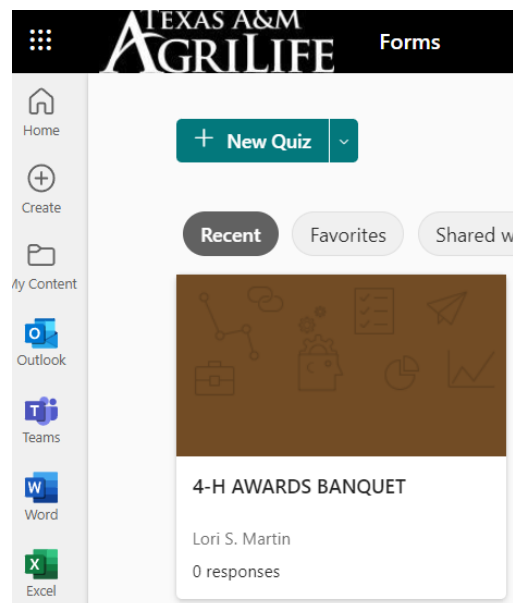
- In the Forms popup, click the radio button “Add an existing form” and scroll down the list to find the form you want to add to the Team; click on the Form; click the SAVE button.



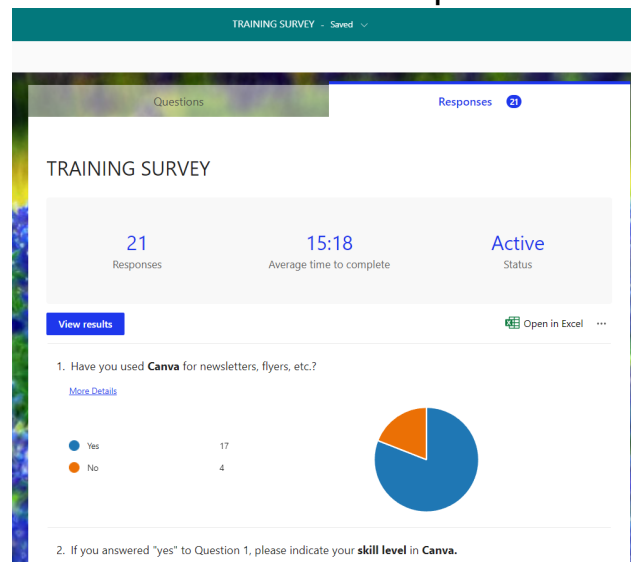
- The new form is now an easy-to-use tab in your Team



- Viewing Results (see Office 365 screenshots above if needed)
 - Login to Office 365 online
 - Click grid in top left toolbar
 - Search for Forms or select the Forms icon
 - Click the icon for the desired Form to return to the editing screen

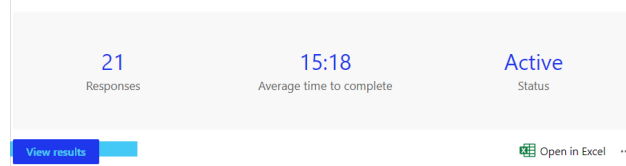


- Click the RESPONSES tab to view results. The summary screen shows totals and summarized responses.



- To see individual responses from each respondent, click the **VIEW RESULTS** button.

TRAINING SURVEY



← Back

View results

Respondent

1 Kim Koetting 02:09 Time to complete

1. Have you used **Canva** for newsletters, flyers, etc.? *

☒ Yes

☐ No

To navigate between respondents, use the left or right arrows. If a respondent cancels registration, click the other actions (...) and delete the response so it will not be on your spreadsheet.

- To see the responses in an Excel spreadsheet, click “Open in Excel”

TRAINING SURVEY

Respondent	Date	Time	Have you used Canva for newsletters, flyers, etc.?	How do you use Canva?	Are you familiar with Canva?	How do you use Canva?	How do you use Canva?	How do you use Canva?	How do you use Canva?
1 Kim Koetting	4/8/22 12:27:02	02:09	Yes	Beginner/Basic	Maybe	Basic/Beginner	Nothing	No	N/A
2 Ruth Splan	4/8/22 12:51:40	02:09	Yes	Beginner/Basic	Maybe	Basic/Beginner	Nothing	No	N/A
3 Tammy Rodriguez	4/8/22 13:06:13	02:09	Yes	Intermediate	Maybe	Basic/Beginner	Nothing	No	N/A
4 Emily Mannell	4/8/22 13:12:14	02:09	Yes	Intermediate	Maybe	Basic/Beginner	Nothing	No	N/A
5 Kim Vera	4/8/22 13:12:10	02:09	No	Beginner/Basic	Maybe	Basic/Beginner	Nothing	No	N/A
6 Mireya Mendosa	4/8/22 13:47:44	02:09	Yes	Advanced	Maybe	Basic/Beginner	Nothing	No	N/A

- To print a summary of responses, click other actions (...) and choose “Print Summary.” The document can be printed or saved to PDF.

12. List your questions about **Cloud Storage (OneDrive, Microsoft To Do, SharePoint).**

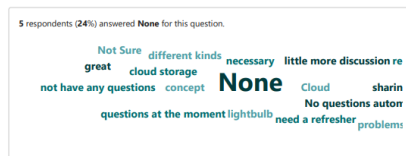
21 Responses

Latest Responses

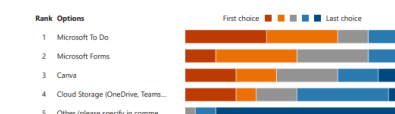
"I understand the concept but I guess the lightbulb hasn't fully s..."

"none"

"NONE"



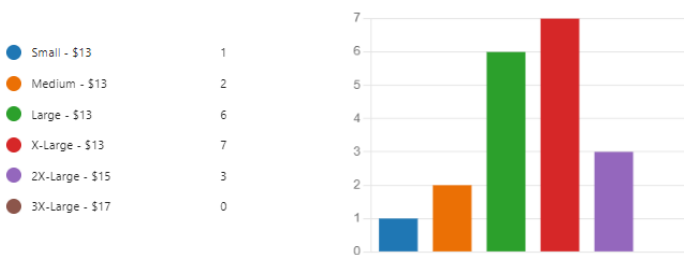
13. Rank in order from 1 to 5 your choices for training topics, with 1 being the top choice.



- The data can be used to plan for caterers, set meeting dates, plan agendas based on interest surveys and skillsets, order shirts, etc.
- Example of results page for shirt order form:

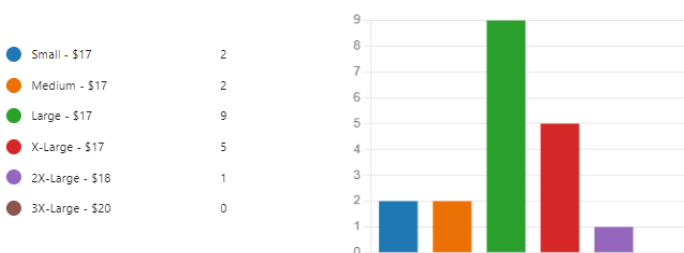
3. If you want to order a SHORT SLEEVE shirt, please indicate size.

[More Details](#)



4. If you want to order a LONG SLEEVE shirt, please indicate size.

[More Details](#)



Shirt order in Excel format:

File Home Insert Page Layout Formulas Data Review View Help Laserfiche Acrobat										
PROTECTED VIEW This file is being verified by Microsoft Defender Advanced Threat Protection. You can continue to read this file while we verify it.										
ID	Start time	Completion time	Email	Name	Name2	County	If you want to order	If you want to order	Total Due	
1	8/31/22 13:57:41	8/31/22 13:58:35	Shantell.Campbell@aj	Shantell Campbell	Shantell Campbell	Wheeler	Small - \$13		\$13.00	
2	8/31/22 14:01:23	8/31/22 14:02:16	crystal.strack@agnet.t	Crystal Strack	Crystal Strack	Moore	Medium - \$17		\$17	

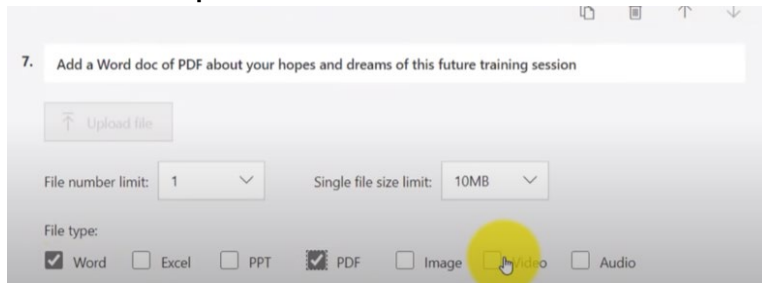
Shirt order in Excel, filtering for short sleeve, size large:

ID	Start time	Completion time	Email	Name	Name2	County	If you want to order	If you want to order	Total Due	
5	8/31/22 14:06:41	8/31/22 14:07:52	kayla.breeding@agnet	Kayla Breeding	Kayla Breeding	District 1 Office Amari	Large - \$17		\$0.00	
10	8/31/22 14:06:16	8/31/22 15:18:15	Kim.Koetting@agnet.t	Kim Koetting	Kayla Breeding	District 1 Office Amari	Large - \$17		\$0.00	
12	9/1/22 8:03:57	9/1/22 8:04:49	lacreia.garza@agnet	Lacreia Garza	Eadie Bradford	Carson	Large - \$13		\$13.00	
25	9/6/22 9:01:14	9/6/22 9:47:54	Janet.Harrison@agnet	Janet Harrison	Lacreia Garza	D1 office	Large - \$13		\$13.00	
29	9/9/22 9:13:11	9/9/22 9:13:48	Lori.Martin@agnet.tar	Lori Martin	Janet Harrison	Dallam & Hartley	Large - \$17		\$17.00	
31	9/9/22 11:52:53	9/9/22 11:53:18	Lori.Martin@agnet.tar	Lori Martin	Mica Malacara	Potter	Large - \$13		\$13.00	
					Emily Marnell	Deaf Smith	Large - \$13		\$13.00	

Forms does the work for you!! You can manipulate the data using Excel or mail merge in Word for name tags, registration lists, CEU lists, etc.

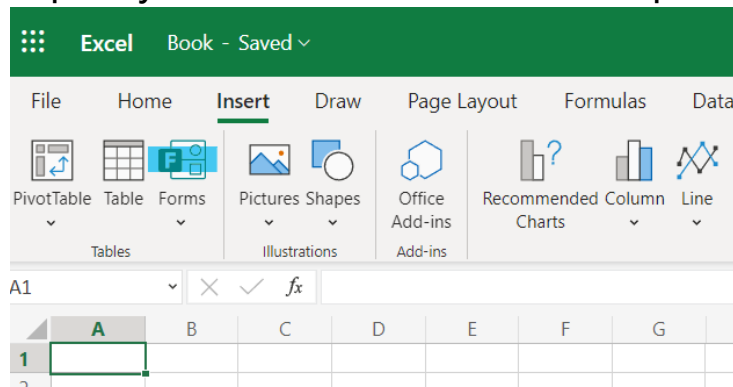
- Other features of Forms:
 - Branching – enables form designer to add branching to any question. For example, if you answer “yes” to Question 1, then you will go to Question 2 (or the designated question), but if you answer “no” to Question 1, then you skip to Question 5.
 - Forms can be copied and used again – we have two conferences per year for Judges and Commissioners. I do not want to use the same form over and over because the data would be deleted. The form can be copied, change the date, and provide a new URL to attendees for registration.
 - Software engineers are always improving features in Forms. It is simple to insert a short poll in an email or Teams chat.
 - Compose a quiz to use with 4-Hers to prepare for contests. Choose New Quiz” at the beginning rather than “New Form.”

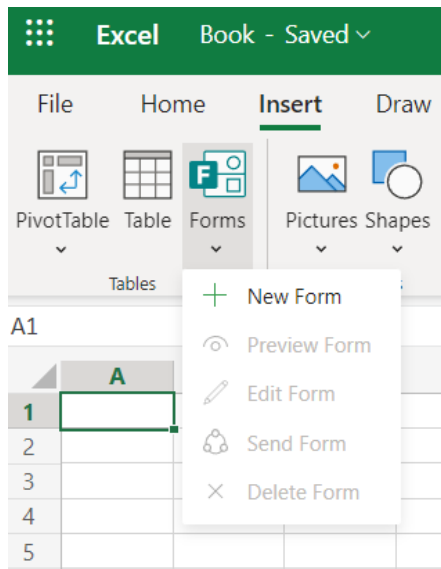
- Insert an interactive question or poll into any virtual Teams training.
- Real-time responses – as respondents submit form, results change in real-time.
- Anonymous submissions – responses can be anonymous if you do not include a field for name, email address or some other identifying information.
- Images can be inserted in questions (quiz question to identify a plant or animal breed)
- Creator of Form can allow respondents to upload a file with their response. This would be beneficial in an awards nomination where the basic information would be input on the form, but a narrative and photos could be attached.



Immersive Reader can be used to translate language or read aloud in English or other specified language. Also, can be used to make screen large for the vision impaired.

- Multi-language forms – respondent can choose which language they want to use to view the form.
- A summary link can be shared so others can view the results summary.
- Questions can be shuffled for quizzes. Form designer can determine which questions to shuffle to keep respondents from looking at neighbor's responses.
- Forms can be duplicated and a link to sent to another person to use and customize the form by adding to their own Forms.
- Excel integration with Forms (web version of Excel in SharePoint) – using Excel online in SharePoint, click Insert > Forms and you will be routed to Forms to create, edit, and review responses. This is a fairly new feature, but hopefully will be extended to the desktop version.





[Microsoft Forms Training and Videos \(Microsoft Training\)](#)

[25 Microsoft Forms Tips and Tricks \(YouTube Video\)](#)

[LinkedIn Learning – Microsoft Forms Essential Forms](#)

[LinkedIn Learning – Quick Tips](#)

[Add Interactive Polls to Meetings](#)

[Setting up a MS Forms Poll Before Teams Meeting](#)

Create a QR Code

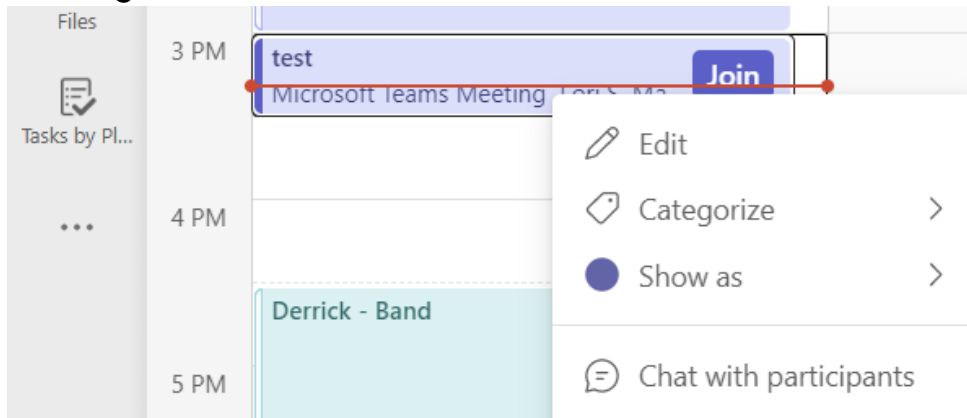
QR Code Monkey

<https://www.qrcode-monkey.com/>

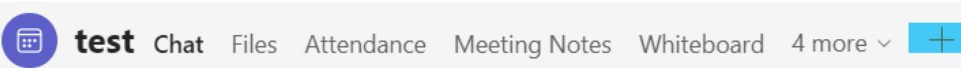
- Enter your URL
- Add logo image if desired
- Customize design
- Click Create QR Code
- Download PNG

LAUNCH POLL BEFORE OR DURING TEAMS MEETING

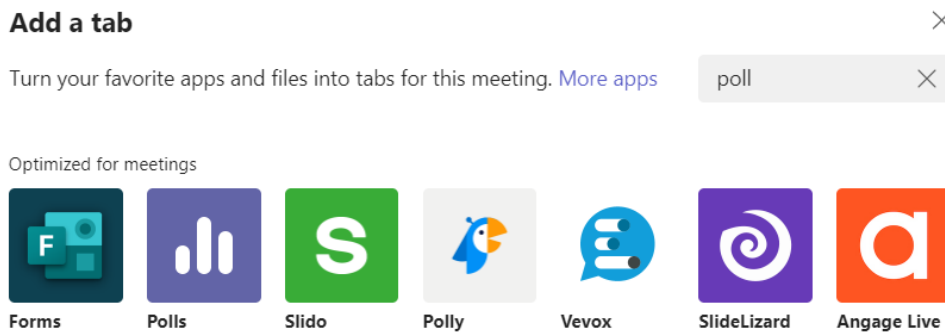
- In Teams, click the CALENDAR icon in the left toolbar
- Find the meeting where you want to insert the poll; right click on that calendar meeting and select CHAT WITH PARTICIPANTS



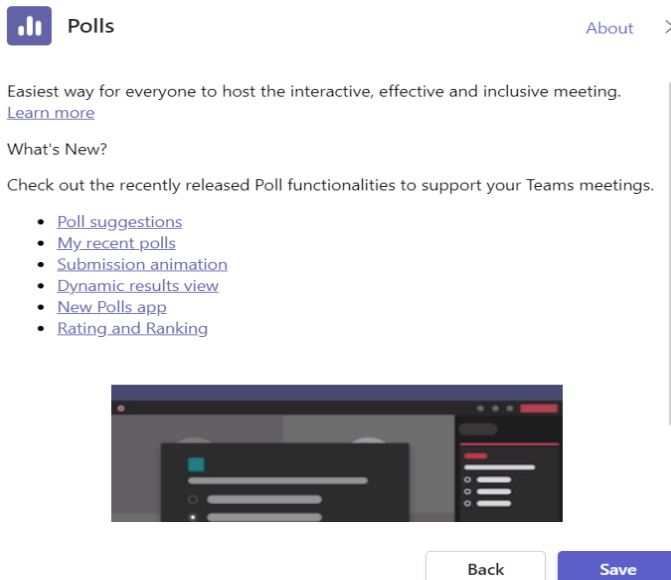
- In the top toolbar, click the + icon



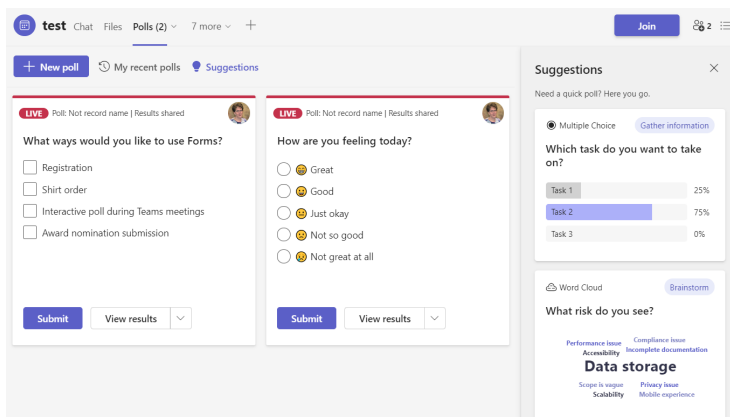
- In the search bar, type POLL and select the POLLS icon



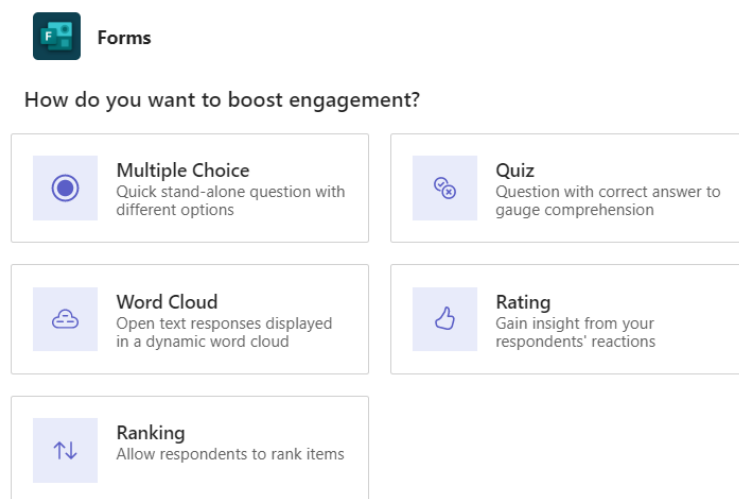
- Click the SAVE button to move to the create screen



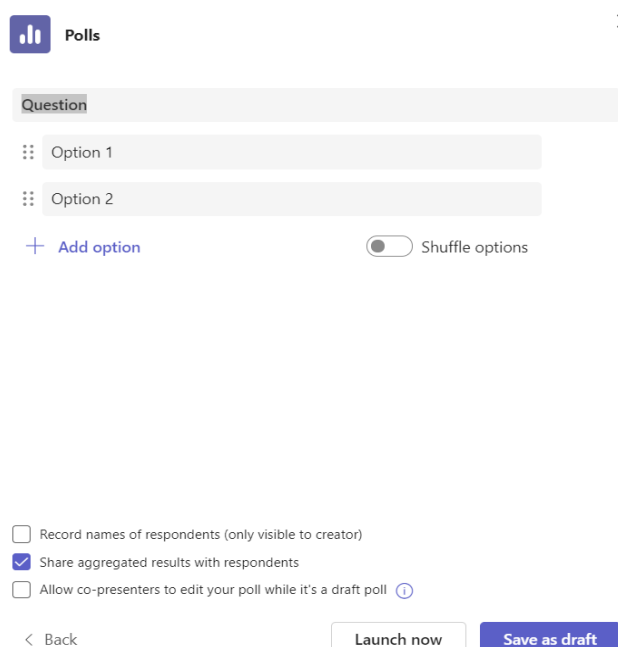
- The poll creation screen provide suggestions in the right pane (these suggested questions can be customized), or click the **+ NEW POLL** button to create from scratch



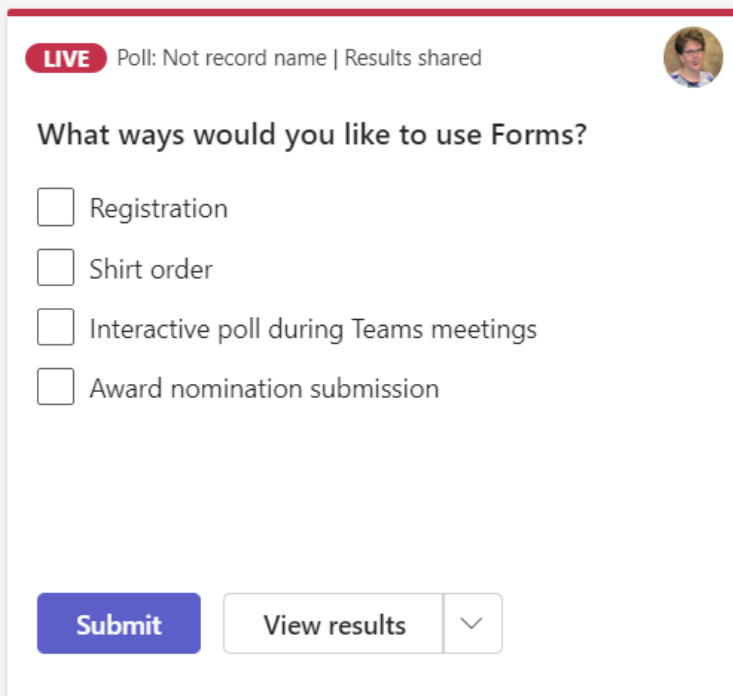
- Following are your choices for polls when creating from scratch



- Choose the type of poll to begin (the example below is for a ranking poll)



- Click **LAUNCH NOW** to post the poll live or **SAVE AS DRAFT** to launch later. If you choose **LAUNCH NOW** your poll will launch and show it is live:



A screenshot of a poll interface with a red header bar. The status is 'LIVE' in a red pill. The poll title is 'What ways would you like to use Forms?'. There are four checkbox options: 'Registration', 'Shirt order', 'Interactive poll during Teams meetings', and 'Award nomination submission'. At the bottom, there is a blue 'Submit' button and a 'View results' button with a dropdown arrow. The poll is set to 'Not record name' and 'Results shared'.

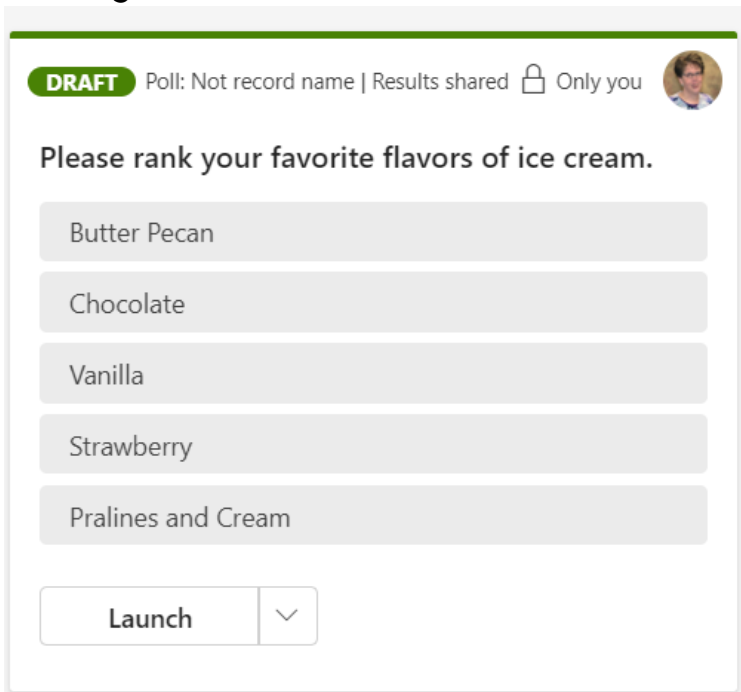
LIVE Poll: Not record name | Results shared

What ways would you like to use Forms?


- ☐ Registration
- ☐ Shirt order
- ☐ Interactive poll during Teams meetings
- ☐ Award nomination submission

Submit View results ▾

If you choose **SAVE AS DRAFT** the poll will save and you can launch during the meeting:



A screenshot of a draft poll interface with a green header bar. The status is 'DRAFT' in a green pill. The poll title is 'Please rank your favorite flavors of ice cream.'. There are five text input fields for ranking: 'Butter Pecan', 'Chocolate', 'Vanilla', 'Strawberry', and 'Pralines and Cream'. At the bottom, there is a 'Launch' button and a dropdown arrow. The poll is set to 'Not record name', 'Results shared', and 'Only you'.

DRAFT Poll: Not record name | Results shared  Only you

Please rank your favorite flavors of ice cream.

- Butter Pecan
- Chocolate
- Vanilla
- Strawberry
- Pralines and Cream

Launch ▾