



# Edline Manual

## Forms and Surveys

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This manual was written for Edline version 2012.

# Content

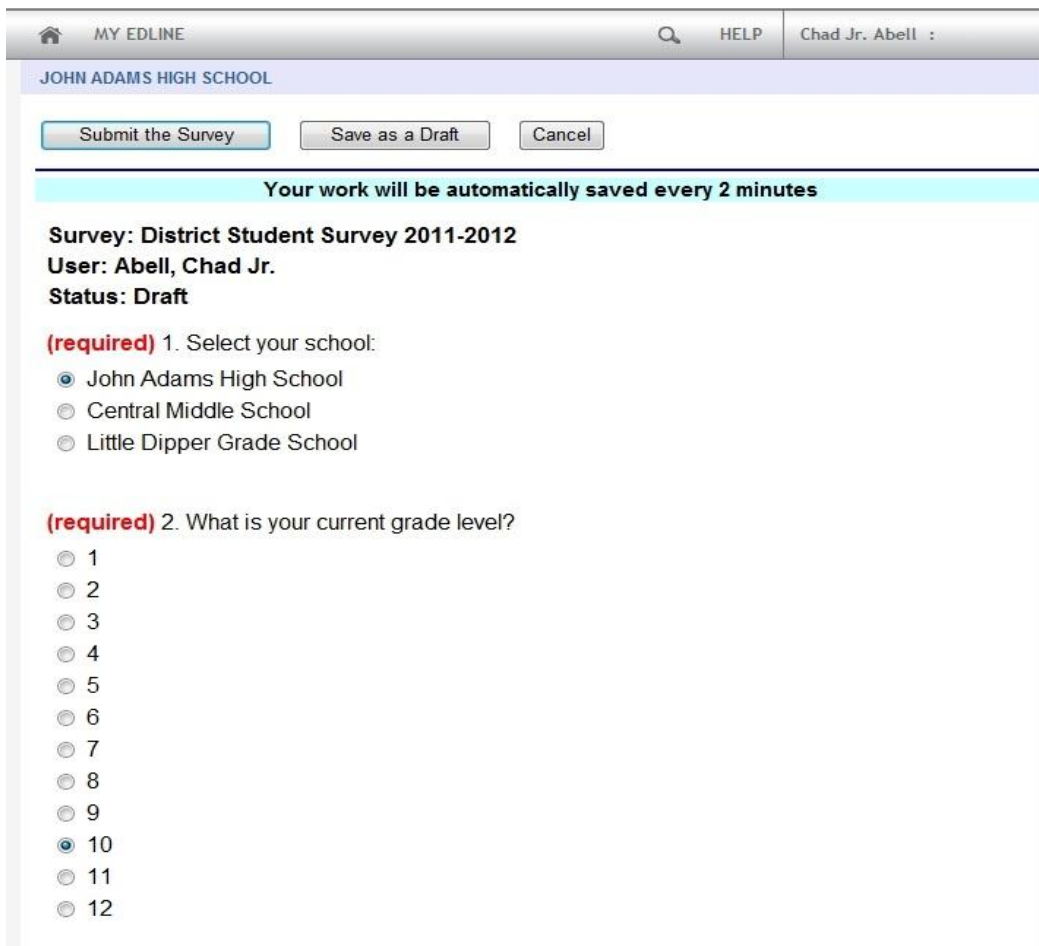
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# Creating Forms and Surveys

Teachers and other district or school staff may create forms or surveys that can be completed online directly through Edline. These documents can be set up to be completed by school personnel only, students in a particular class, parents needing to complete forms for their students, or even community members if the school wants to gather anonymous feedback on a particular topic. The name of the form or survey will be available as a link on the web page. For more information about the Forms and Survey module, see the Edline Education Center in the **Help** menu. A copy of this guide is available in the help in the **Edline User Guides** topic in the **Documentation** tab of the Edline Education Center.

 **Tip:** Many schools save money on printing costs by using Edline online forms and surveys.



The screenshot shows the Edline user interface. At the top, there is a navigation bar with a home icon, 'MY EDLINE', a search icon, 'HELP', and the user name 'Chad Jr. Abell'. Below this is a header for 'JOHN ADAMS HIGH SCHOOL'. The main content area contains three buttons: 'Submit the Survey', 'Save as a Draft', and 'Cancel'. A light blue banner below the buttons states 'Your work will be automatically saved every 2 minutes'. The survey details are as follows:

- Survey:** District Student Survey 2011-2012
- User:** Abell, Chad Jr.
- Status:** Draft

There are two required questions:

- (required) 1. Select your school:**
  - John Adams High School
  - Central Middle School
  - Little Dipper Grade School
- (required) 2. What is your current grade level?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
  - 8
  - 9
  - 10
  - 11
  - 12

*Survey Sample*


## Creating a Form/Survey

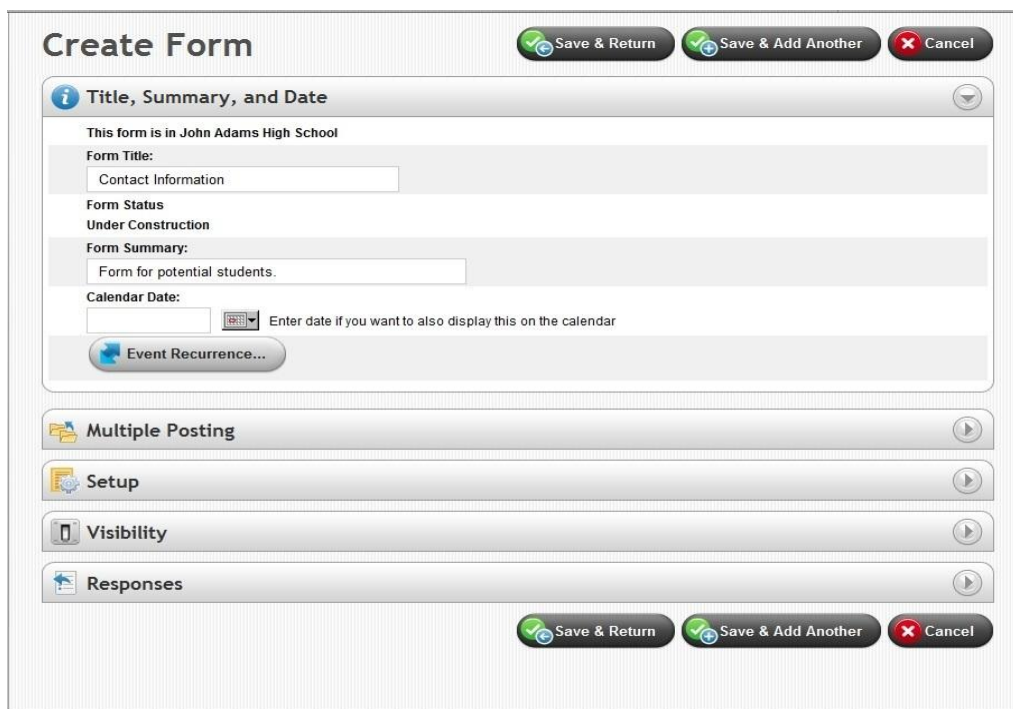
You can add a new form/survey to the Edline website to be filled out by guests of your websites. Forms/Surveys can be created at the district website (by district super users) and the school website (by school super users). You cannot create forms in classes, sports, or other activities, however you can create surveys for those groups.

Forms/Surveys can include files to download and fill-out on paper, or they can be an online form with multiple choice answers, True/False, drop-down selection list answers, or text responses.

### To Add Forms/Surveys to Your Website

Open the web page or folder where you want to create the form or survey.

1. From the Edline menu bar, click **Edit This Page** to access the edit mode.
2. Hover over the section where you want to add the form/survey, and click the **Add an item to this box**  icon to access the Add Item Type pallet.
3. Select **Form/Survey** from the selection box to access the Create Form/Survey page.



#### Create Form Page Example


4. Type the name of the form/survey in the **Form/Survey Title** field. This title will appear on the website.

5. Type a brief summary for the form/survey in the **Form/Survey Summary** field.
6. Type or select the date for the form/survey in the **Calendar Date** field. This option sets the form/survey as a calendar event.
7. Click **Save and Return** to add the form/survey.
8. Click **Done** to exit the edit mode.

## To Add the Form/Survey to More Than One Group

You can determine which groups to add your form/survey to from the **Multiple Posting** section. This feature enables super users to create the form/survey only once and post it in one step to all the groups they need.

1. From the Manage Form/Survey page, select the groups to view the form/survey from the **Available Groups** field in the **Multiple Posting** section.
2. Click **Add**.

 **Note:** To remove a group from viewing the form/survey, click the group name in the **Additional Posted Groups** field and click **Remove**.

## To Add Content to the Form/Survey

You can add different types of questions or fill-in-the-blank information for your form/survey. This section teaches you how to create different sections for your form/survey.

1. From the Manage Form/Survey page, click **Build My Form/Survey** in the **Setup** section to access the Form/Survey Builder page.



*Form Builder Page Example*

2. Select the font type for the form/survey from the **Default Font** field.
3. Select the font size for the form/survey from the **Size** field.

4. Click **Done** when you are finished building the form/survey.

### Create Instructions

You can type instructions for users providing them with directions on how to finish the form/survey.

1. From the Form/Survey Builder page, select **Plain Text (e.g. instructions to users)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

Question Builder

Save & Return Cancel Save & Refresh

**Text:**

Font family Font size **B** *I* U [ABC](#) [Link] [Unlink] [List] [Insert] [Table]

Thank you for your interest in John Adams High School!

Please fill out the form to receive more information about our school. Allow two weeks to receive your packet in the mail.


**Preview:**

Thank you for your interest in John Adams High School!

Please fill out the form to receive more information about our school. Allow two weeks to receive your packet in the mail.

### Question Builder Page

2. Type the instructions for the user to follow as directions of the form/survey in the **Text** section.
3. Click **Save and Return**.

 **Tip:** The Form/Survey Builder page includes the **Preview**, **Edit**, **Delete**, and **Clone** buttons. Use these features to review the form/survey, change the question, delete the question, or copy the question.

## Create Multiple Choice Questions

You can create multiple choice questions for your form/survey. There are two types of multiple choice questions you can design – where the user can only select one answer, or where the user can select multiple answers.

1. From the Form/Survey Builder page, select **Multiple Choice (only one pick allowed)** or **Multiple Choice (multiple picks allowed)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

The screenshot shows the 'Question Builder' interface. At the top, there are three buttons: 'Save & Return', 'Cancel', and 'Save & Refresh'. Below these is the 'Question Text' section, which includes a 'Font family' dropdown, a 'Font size' dropdown, and a text area containing the question: 'How did you hear about our school?'. Underneath the question text are six 'Choice' fields, each with a text input box. The first four choices are: 'Through a current student.', 'Through school visits by recruiter.', 'Through advertisements and flyers.', and 'Other'. The fifth and sixth choices are empty. Below the choice fields is an 'Add More Choices' button. The 'Optional Settings' section includes a 'Required Field?' dropdown set to 'No' and a 'Short Field Label' field containing 'Field1' with a note '(used when exporting data)'. At the bottom, there is a 'Preview' section showing the question and its choices as they would appear to the user.


### Question Builder Page

2. Type the question for the form/survey in the **Question Text** section.
3. Type the response choices in the **Choice** fields.



 **Tip:** To add more responses, click **Add More Choices** for additional fields.

4. Determine whether or not the user must respond to the question by completing one of the following steps:
  - Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the question has been answered.
  - Select **No** in the **Required Field?** if the question is not required.
5. If the user can select multiple choices, enter the maximum number in the **Maximum Number of Selections by User** field.
6. Type a name for the question in the **Short Field Label** field.

 **Tip:** It is useful to change each **Short Field Label** to something that corresponds to the question on the form/survey. This label will make it easier when reviewing data that has been exported for a form/survey.

7. Click **Save and Return**.

### Create Yes/No Questions

You can create Yes/No questions for your form/survey. Users will be able to choose the correct response.

1. From the Form/Survey Builder page, select **Yes or No** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

**Question Builder**

**Question Text:**

Font family:  Font size:

**B** *I* U

Will be using our bus service to attend John Adams High School?

Choice 1:

Choice 2:

Choice 3:

Choice 4:

Choice 5:

Choice 6:

**Optional Settings:**

Required Field?

Short Field Label:  (used when exporting data)

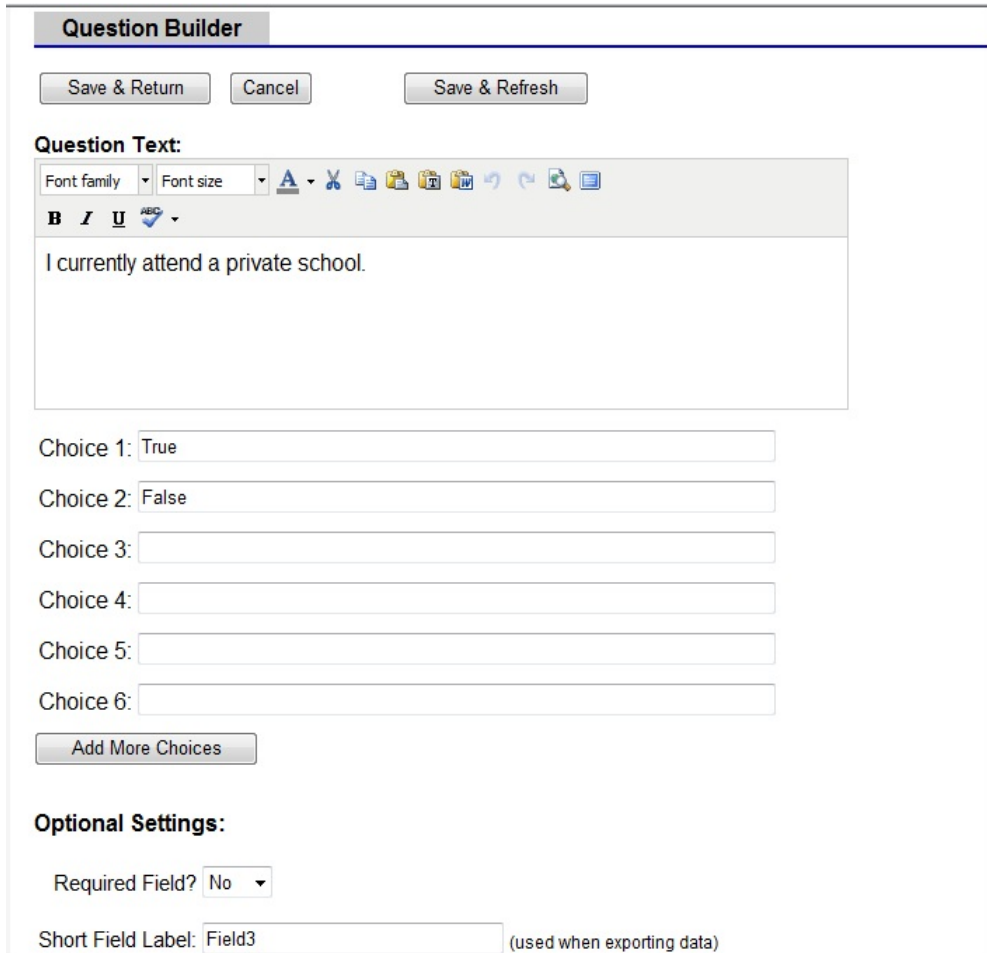
*Question Builder Page*

2. Type the question for the form/survey in the **Question Text** section.
3. Determine whether or not the user must respond to the question by completing one of the following steps:
  - Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the question has been answered.
  - Select **No** in the **Required Field?** if the question is not required.
4. Type a name for the question in the **Short Field Label** field.
5. Click **Save and Return**.

## Create True/False Questions

You can create True/False questions for your form/survey. Users will be able to choose the correct response.

1. From the Form/Survey Builder page, select **True** or **False** from the **Add Item** field, and then click **Add Now** for the Question Builder page.



**Question Builder**

Save & Return   Cancel   Save & Refresh

**Question Text:**

Font family   Font size   A   ✂   📄   📁   📅   📆   🔄   🔄   🔄

**B**   *I*   U   #ABC

I currently attend a private school.

Choice 1: True

Choice 2: False

Choice 3:

Choice 4:

Choice 5:

Choice 6:

Add More Choices

**Optional Settings:**

Required Field? No

Short Field Label: Field3 (used when exporting data)

### Question Builder Page

2. Type the question for the form/survey in the **Question Text** section.
3. Determine whether or not the user must respond to the question by completing one of the following steps:
  - Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the question has been answered.
  - Select **No** in the **Required Field?** if the question is not required.

4. Type a name for the question in the **Short Field Label** field.
5. Click **Save and Return**.

### Create Text Response (Essay) Questions

You can create questions with text responses for your form/survey. There are two types of text questions you can design – where the user types a one line answer, or where the user can type a longer text response.

1. From the Form/Survey Builder page, select **Short Typed Answer (one line of text)** or **Paragraph Answer (multiple lines of text)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

The screenshot displays the 'Question Builder' interface. At the top, there are navigation links for 'MY EDLINE' and 'TOOLS', along with a search icon and 'HELP'. Below this is a header for 'JOHN ADAMS HIGH SCHOOL'. The main area is titled 'Question Builder' and contains three buttons: 'Save & Return', 'Cancel', and 'Save & Refresh'. Underneath is the 'Question Text' section, which includes a rich text editor with a toolbar (font family, font size, bold, italic, underline, link, unlink, insert image, insert video, insert audio, insert table) and a text area containing the question: 'What is your first, middle initial, and last name?'. Below the text area is the 'Optional Settings' section, which includes a 'Required Field?' dropdown menu set to 'No', a 'Maximum Characters' input field with a default value of 200, a 'Field Width' input field with a default value of 50, and a 'Short Field Label' input field containing 'Field4' with a note '(used when exporting data)'. At the bottom is a 'Preview' section showing the question as it will appear in a form: '4. What is your first, middle initial, and last name?' followed by a text input field.

#### Question Builder Page

2. Type the question for the form/survey in the **Question Text** section.
3. Determine whether or not the user must respond to the question by completing one of the following steps:

- Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the question has been answered.
  - Select **No** in the **Required Field?** if the question is not required.
4. For a short text answer, type the maximum number of characters allowed for the response in the **Maximum Characters** field.
  5. Type the maximum width for the question in the **Field Width** field.
  6. For a paragraph text answer, type the maximum number of rows allowed for the response in the **Number of Rows** field.
  7. Type a name for the question in the **Short Field Label** field.
  8. Click **Save and Return**.

### Create Selection Choice Questions

You can create questions with drop-down lists for users to choose the correct response.

1. From the Form/Survey Builder page, select **Dropdown List (pick one)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

JOHN ADAMS HIGH SCHOOL

### Question Builder

Save & Return    Cancel    Save & Refresh

**Question Text:**

Font family    Font size   

**B** *I* U

When is the best time to contact you?

Choice 1:

Choice 2:

Choice 3:

Choice 4:

Choice 5:

Choice 6:

**Optional Settings:**

Required Field?

Short Field Label:  (used when exporting data)

**Preview:**

1. (no text has been provided yet)

*Question Builder Page*

2. Type the question for the form/survey in the **Question Text** section.
3. Type the response choices in the **Choice** fields.

**Tip:** To add more responses, click **Add More Choices** for additional fields.

4. Determine whether or not the user must respond to the question by completing one of the following steps:
  - Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the question has been answered.
  - Select **No** in the **Required Field?** if the question is not required.

5. Type a name for the question in the **Short Field Label** field.
6. Click **Save and Return**.

### Create Hand-In Attachment

You can create a field in the form/survey where the user can upload an attachment to include in the form/survey. As a result, you can have users upload additional responses, or copies of important documents.

1. From the Form/Survey Builder page, select **Hand-In (file attachment handed in by the submitter)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

The screenshot displays the 'Question Builder' interface. At the top, there are navigation links for 'MY EDLINE' and 'TOOLS', and a search bar with 'HELP'. The page title is 'JOHN ADAMS HIGH SCHOOL'. The main section is titled 'Question Builder' and contains three buttons: 'Save & Return', 'Cancel', and 'Save & Refresh'. Below this is the 'Question Text' section, which includes a rich text editor with a toolbar (font family, font size, bold, italic, underline, link, unlink, list, unlink, undo, redo) and the text 'Please attach a copy of your transcripts.' The 'Optional Settings' section has a 'Required Field?' dropdown set to 'Yes' and a 'Short Field Label' field with the value 'Field6' and a note '(used when exporting data)'. The 'Preview' section shows the question as '(required) 6. Please attach a copy of your transcripts.' with a 'Browse...' button.

### Question Builder Page

2. Type the question for the form/survey in the **Question Text** section.
3. Determine whether or not the user must respond to the question by completing one of the following steps:
  - Select **Yes** in the **Required Field?** to mark the question as required. The user will not be able to submit the form/survey until the hand-in has been attached.

- Select **No** in the **Required Field?** if the hand-in is not required.
4. Type a name for the question in the **Short Field Label** field.
  5. Click **Save and Return**.

### Create Hand-Out Attachment

You can create a field in the form/survey where the user can download an attachment you created for the form/survey. As a result, you can attach additional documents for the user to save or fill-out in addition to the form/survey.

1. From the Form/Survey Builder page, select **Hand-Out (file attachment handed out by you)** from the **Add Item** field, and then click **Add Now** for the Question Builder page.

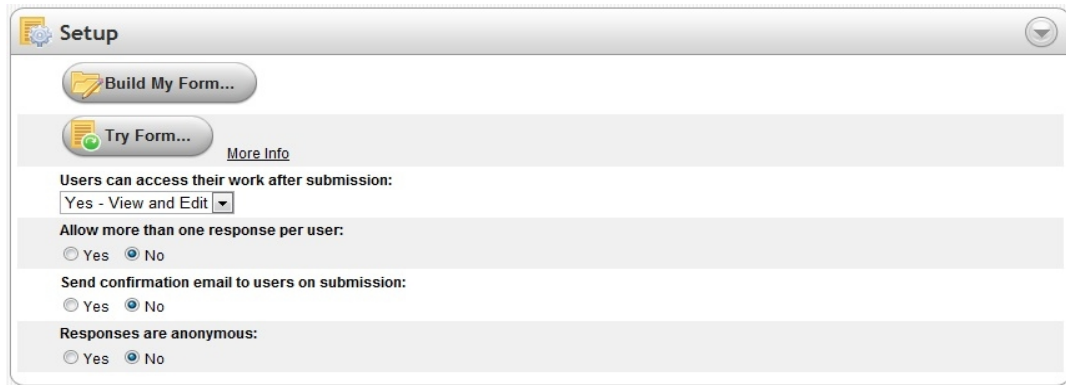
#### Question Builder Page

2. Type the question for the form/survey in the **Text** section.
3. Click **Browse** to search for the location of the attachment, and then click **Attach File**.
4. Click **Save and Return**.



## To Configure the Form/Survey Response


You can determine whether or not users can review the form/survey after submitting it, and whether or not the responses can be anonymous. For forms, you can also determine whether or not to send the user a confirmation email after the submission, and whether or not the user can submit multiple forms.




The screenshot shows a 'Setup' window with a gear icon and a dropdown arrow. It contains two buttons: 'Build My Form...' and 'Try Form...'. Below the buttons is a 'More Info' link. The main content area is divided into four sections, each with a title and a set of options:

- Users can access their work after submission:** A dropdown menu currently set to 'Yes - View and Edit'.
- Allow more than one response per user:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Send confirmation email to users on submission:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Responses are anonymous:** Radio buttons for 'Yes' and 'No', with 'No' selected.

### Setup Section

 **Tip:** To preview a sample of the form/survey, click **Try Form/Survey**. You will be able to test the form/survey before sending it out to users.

1. From the **Setup** section on the Manage Form/Survey page, select whether or not the user can access the form/survey after the submission by completing one of the following steps:
  - Select **No** from the **Users can access their work after submission** field to not allow the user to view the form/survey after submitting it.
  - Select **Yes - View Only** from the **Users can access their work after submission** field to allow users to view the form/survey after submitting it, but not allow them to make any changes.
  - Select **Yes - View and Edit** from the **Users can access their work after submission** field to allow users to view the form/survey and make any changes they want after submitting it.
2. **(FORMS ONLY)** Determine whether or not the user can submit multiple forms from the **Allow more than one response per user** field.
  - Select **Yes** to allow the user to submit multiple forms.
  - Select **No** to only allow one form per user.

 **Note:** By setting this field to **Yes**, the user filling out the form will receive a response identification code they must copy to re-access their information.

3. **(FORMS ONLY)** Determine whether or not to send an email to the user after submission from the **Send confirmation email to users on submission** field.
  - Select **Yes** to send an email to the user.
  - Select **No** to not send a confirmation email.
4. Determine whether or not the responses will be anonymous from the **Responses are anonymous** field.
  - Select **Yes** to allow the user to submit the forms/surveys anonymously.
  - Select **No** to include the user's name on the form/survey.
5. Click **Save and Return**.


## To Restrict the Visibility of a Form/Survey

By default, all forms/surveys you create are automatically set to have limited visibility, which means the form/survey can be completed only by the types of users you select. You can change the visibility of a form/survey to be opened to all types of users.


1. From the Manage Form/Survey page, click **Specify Submitters** in the **Visibility** section.
2. Change any of the visibility options in the **Basic Visibility Options** section and/or the **Advanced Visibility Options** section:
  - Select **Public** to allow anyone to submit the form/survey.
  - Select **Limited** to select the types of users who can submit the form/survey. From the drop-down selection, choose whether those users are limited to your particular group, school or district. Select (check) the types of users who can submit the form/survey. These users will be required to sign into Edline before viewing the form/survey from the website.
  - Select **No additional restrictions** to not add advanced visibility options.
  - Select **Show from \_ until \_** to set the form/survey so that it will be visible for a specific date range, and then be hidden to users after the date range passes. Type or select the dates in the fields.
  - Select **Show via Site Designer, but hide in lists** to set the form/survey to be visible to super users and design managers only.
  - Select **Hide completely** to set the form/survey as personal. The form will only be available to you and all super users, super viewers, and site coordinators.
3. Click **Update**.

## To Allow Form/Survey Submissions

Before a form/survey is available to users, you must allow for submissions. This feature enables you to continue building the form/survey until it is ready for use.

 **Important:** You cannot change a form/survey once a user has submitted a response.


1. From the Manage Form/Survey page, select **In all locations** from the **Responses** section to set the form/survey as ready in all schools, classes, sports, and other activity web pages. Clear this field if you want the form/survey to be available for the current group only.
2. Click **Allow Form/Survey Submissions** to mark the form/survey as available.
3. Click **Save and Return**.

 **Note:** If you need to make changes to the form/survey and no user has submitted their responses, click **Prevent Form/Survey Submissions**.

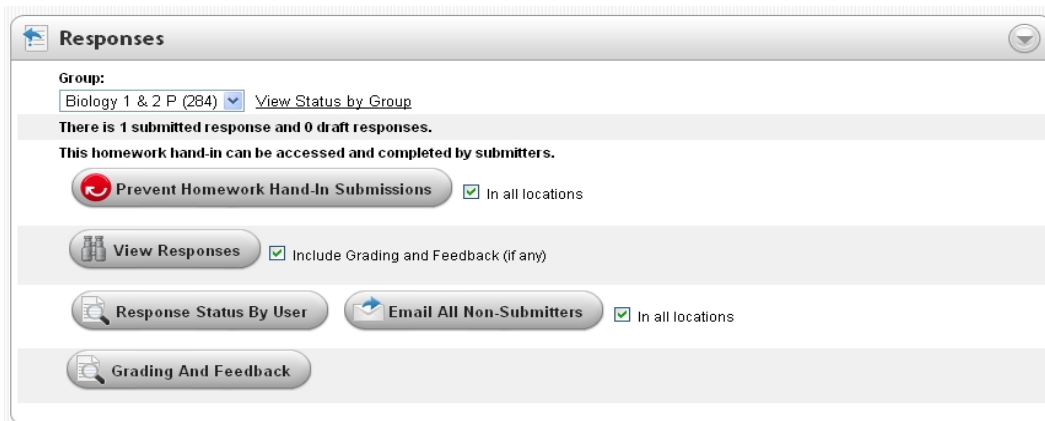
## Reviewing Responses for Forms, Surveys, Homework, Quizzes, and Other Assignments

Teachers and other staff with super user permissions will be able to view the answers for forms, surveys, homework, quizzes, and interactive assignments. You can view the status of responses by different groups, review the individual user responses to questions, and determine who has not responded to a form or other assignment and then email them. The permission to view responses is only available to school personnel.

### Open the Responses Section

- From the section of the web page containing the content, click the **Edit in list view**  icon to open the list of contents, and then click the **Edit** button next to the name of the assignment you want to review the responses for to open the Manage Form, Manage Survey, Manage Homework Hand-In, Manage Quiz, or Manage Interactive Assignment page.

The **Response** section will list the number of responses received.

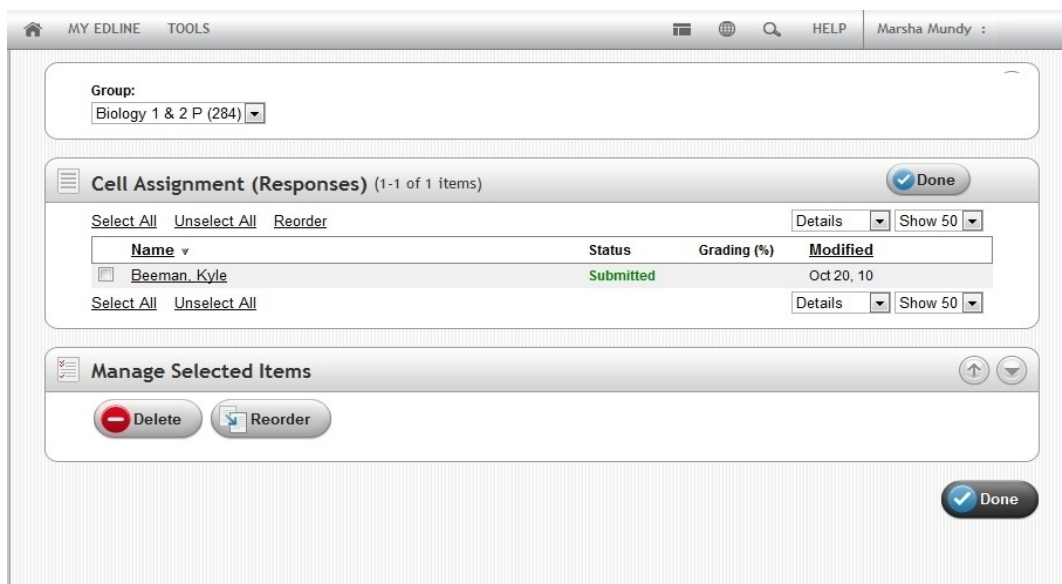


Responses Section – Sample from Homework Hand-In

## To Review the Responses

School personnel with the appropriate permissions will be able to use this feature to view the responses for forms and surveys, and teachers will be able to view the responses for homework, quizzes, and other assignments that they have created.

1. Click **View Responses** to access the Form Response List page.



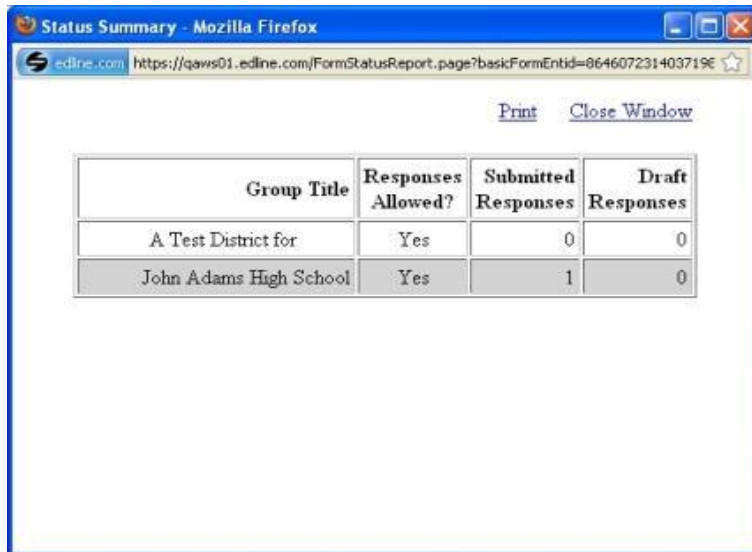
Form Response List Page

2. Click on the name of user you want to view to access the Document View page. If the document has been multi-posted, use the **Group** drop-down menu to select the desired group of responses to view.
3. Click **Done** when finished.

## To View the Status of Responses by Groups (Schools, Classes, Sports, Activities)

For multi-posted forms and surveys, school personnel will be able to view response statistics, such as the number of users who have submitted responses. Teachers will be able to view the status of which classes have submitted their homework, quizzes, and other assignments.

- Click **View Status by Group** link to access the Status Summary dialog box.



Group Title	Responses Allowed?	Submitted Responses	Draft Responses
A Test District for	Yes	0	0
John Adams High School	Yes	1	0

*Status Dialog Box*

## To View the Status of Responses by Users


School personnel will be able to view the status of which users within a group (school, classes, sports, activities) have submitted their forms, surveys, homework, quizzes, and other assignments. Use this feature to determine which users should be reminded to submit their responses.

- Click **Response Status by User** to access the User List page which displays who did or did not submit a response, or to see who has completed a draft response.

## Send a Reminder Email to Non-Submitters

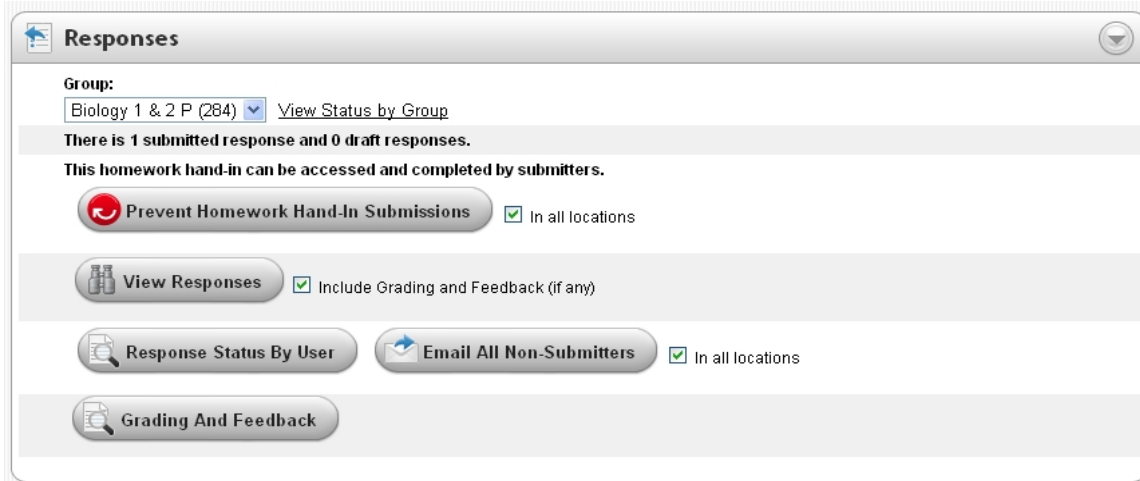
Teachers and other personnel with super user permissions will be able to send reminders to users to respond to forms, surveys, homework, quizzes, and interactive assignments. The email is automatically configured to email only the users who have not submitted responses.

### Open the Responses Section

- From the section of the web page containing the content, click the **Edit in list view**  icon to open the list of contents, and then click the **Edit** button next to the name of the assignment you

want to send reminders for to open the Manage Form, Manage Survey, Manage Homework Hand-In, Manage Quiz, or Manage Interactive Assignment page.

The **Responses** section will list the number of responses received and includes the **Email All Non-Submitters** button.



*Responses Section – Sample from Homework Hand-In*

## To Email Reminders for Forms, Surveys, Homework, Quizzes, and Other Assignments


School personnel will be able to use this feature to send reminders for submissions.

1. Click **Email All Non-Submitters** to access the Compose Email page.
2. Complete the email message by following the instructions in the *Sending Emails* topic.

## Creating Exports and Reports Based on Responses

Teachers and other personnel with super user permissions will be able to create reports and export data based on the answers for forms, surveys, homework, quizzes, and interactive assignments. The exports will allow you to create a spreadsheet or web file of the data.

### Open the Export/Reporting Section

- From the section of the web page containing the content, click the **Edit in list view**  icon to open the list of contents, and then click the **Edit** button next to the name of the assignment you want to create a report for to open the Manage Form, Manage Survey, Manage Homework Hand-In, Manage Quiz, or Manage Interactive Assignment page.

The **Export/Reporting** section will be available when users have submitted their responses.

### Export/Reporting Section

## To Export Response Data

School personnel will be able to use this feature to view the responses for forms, surveys, homework, quizzes, and other assignments by exporting the data into a spreadsheet or XML file. You will be able to select exactly which questions to include in the data.

1. Click **Choose Fields to Export** to access the Form Export Fields page.

Export?	Field Number	Question for Field
<input checked="" type="checkbox"/>	1	My child's teacher kept their class w...
<input checked="" type="checkbox"/>	2	My child's teacher sent me at least o...
<input checked="" type="checkbox"/>	3	I found Edline's login system easy.

### Form Export Fields Page

2. Select (check) the fields to export and click **Save and Return**.
3. Select either spreadsheet or web file to export by selecting **CSV** or **XML** from the **Format** field.
4. Select the group (school, class, sport, activity) to include in the export from the **Group** field.
5. Select **Export multiple rows of data for parents with multiple children** if you want to include a separate row for a parent's response based on each child. Clear this field to include only one row of responses.
6. Click **Export Field Data** to generate the export.
7. Click **Download Data to My Computer** when ready.

## To Download Attachments to Response Data

If an attachment has been added to a form, survey, homework, quiz, or other assignment, school personnel will be able to download the attachment.

1. Under the **Export/Reporting** section, select the group (school, class, sport, activity) to include in the export from the **Group** field.
2. Click **Export File Attachments** to generate the export.
3. Click **Download Data to My Computer** when ready.

## To Generate an Item Analysis Report from Response Data

School personnel will be able to view the percentage of responses for forms, surveys, homework, quizzes, and other assignments. You will be able to determine which response was selected and how often.

1. Under the **Export/Reporting** section, select the group (school, class, sport, activity) to include in the export from the **group** field in the **Generate** section.
2. Click **Go** to generate the report.



Done

### District Student Survey 2011-2012

Item Analysis - all groups, combined

Responses Processed: 3

**1. Select your school:**

Choices	Selections	% of Total
John Adams High School	3	100%
Central Middle School	0	0%
Little Dipper Grade School	0	0%

**2. How many days a week do you use your classroom computer?**

Choices	Selections	% of Total
NONE	0	0%
1 day per week	0	0%
2 days per week	2	67%
3 days per week	0	0%
4 days per week	1	33%
5 days per week	0	0%

**3. Do you use the internet at home?**

Choices	Selections	% of Total
Yes	2	67%
No	1	33%

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