

**Summary:** Instructions for creating a form (or survey) in eSchoolView. Once the form is created, it can then be added to a webpage

**Prerequisites:** Access to the Site Section Survey/Form/Quiz Management Admin Option

## Steps

1. After logging in, click on the **Site Section** where the form will be placed
2. Under Site Section Administration Options, click Survey/Form/Quiz Management
3. Click **+ Add Survey/Form**
4. The first step is to add general information about the survey:



### Title

**Description and Add'l Information** (if needed)

**Show Results Button** (See the explanation. For form creation, leave unchecked)

**Results Private** (if this is checked, only the form creator can see the submissions)

**Anonymous OK** ( if a name/email field is placed in the form itself, check this box)

**Confirm message** (create a customized message for users upon completion of form)

**Alert Email** (add email addresses here if you wish to be notify every time a user completes the survey/form)

**Date Visible and Date Expires** (add dates here if a limited time is desired)

Click **Save**

 A screenshot of the "Survey Information" form in eSchoolView. The form has several sections:
 

- Title:** A text box containing "Contact Us". A red arrow points to this box.
- Description:** A rich text editor containing the text "Please fill out the form below if you wish to be contacted by the school". A red arrow points to the text area.
- Add'l Information:** Another rich text editor, currently empty. A red arrow points to this section.
- Show Results Button?** An unchecked checkbox.
- Results Private?** An unchecked checkbox.
- Anonymous OK?** A checked checkbox. A red arrow points to this checkbox.
- Confirm Message:** A text box containing "Someone will be in touch with you soon". A red arrow points to this box.
- Alert Email(s):** A text box containing "dstephen@btboces.org". A red arrow points to this box.
- Date Visible:** An empty date field.
- Date Expires:** An empty date field.
- Buttons:** "Save", "Cancel", and "Delete" buttons at the bottom. A red arrow points to the "Save" button.

- The second step is to add questions. The available question **Types** are:
  - Yes/No** (A dropdown menu is provided to select either )
  - Single Text** (Provides a field for smaller, single text responses)
  - Free Text** (Provides an empty field for longer text responses, this can be used for a Comments Box)
  - Radio List** (Provides multiple options with Radio Buttons from which a single selection may be made)
  - Dropdown List** (Provides a dropdown list from which a single option may be selected)
  - Checkbox List** (Provides a list of multiple checkboxes allowing for multiple selections)
  - Document Upload** (Allows participants to upload documents )

**Question Text**( Once the type of question is selected. Add this)

**Is Req'd?** (If checked, the form can't be submitted without completing this)

If you need to attach an image or file, browse to choose it

Click **Save Question**

- Sort the order of the fields (drag green bars and drop ) or Edit a question

- Click **Save** again. Red text should appear announcing that **Your changes have been saved**
- The final step is to add the survey/form to a page using the Survey/Form component