

Creating a Form using the Survey Page Type in your CMS web site.

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## Before you start

Work from a hard copy outline that you create with your word processor or manually. Use the tips and directions that follow to have your outline ready before you log into your web site. When you are creating your form in the web site, set up your questions before structuring the form. Questions can be moved after you have created them

## Introductory Text

- ✓ Outline the instructions a visitor will need in order to complete your form.
- ✓ Give advance notice if you will require any information that needs thought.
- ✓ Advise people to have their information ready to copy and paste.
- ✓ Encourage the use of point form in their text submissions.
- ✓ Advise them of the 30 minute security timeout.
- ✓ Test and let them know how long it should take to complete the form.
- ✓ Be sure to add a disclaimer regarding how the information gathered will be used.
- ✓ Assure them of privacy respect.
- ✓ Thank them for taking the time to complete the form.
- ✓ Explain how it will benefit them and/or the organization.
- ✓ Advise whether they will receive a copy of their submission by supplying an email address or they should use the Preview Submission button and print or save it for their records.

## Conclusion Text

Not mandatory. Use this area to outline any further instructions a visitor needs

## Thank You Text

Mandatory. You have taken up valuable time and should show your appreciation here. Once your respondent submits the form, they are taken to this page. Restate your important information here. Advise if there will be any further contact, how and when.

Supply any contact information as necessary. Consider adding a map to your venue.

## Constructing Question Text

Organize your questions with the goal of gathering information for your purpose without bias. How will you use the information you are asking for?

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What is the objective of the gathered information?

Your questions should be organized and grouped together with like.

Use a Category header for sections for a more organized look. (Contact Information/Area of Study/etc).

- ✓ Separate the actual question words from instructions or description.
- ✓ Format your questions in a succinct manner.
- ✓ Clear short and direct questions are easier understood and more likely to be read in full. "Please supply your first or given name" is wordy. "First Name" is easily understood and lets your audience know right away the style of your questions will be quick for them to digest. There will be no wasted time reading to find what you are asking for. If your first few questions are wordy, your audience is more likely to abandon the form.
- ✓ If you need to elaborate on a question, use the description question type preceding the actual question. Consider putting the directions in the introduction.
- ✓ example: The respondent should select more than one answer from a list. Use the description question type to outline what they need to do in the following question.
- ✓ Keep the selection of and structure of answers short. If the answers are easy to scan through, the user will not tire and will put more thought into their choice.

## Question Types and Their Use

Now you have organized your introductory text, the questions and the answers. it is time to look at the available question types in the Active Network CMS that you will use to build your form. Different question types have a unique purpose for specific question types. This information is available online and in PDF format at [www.cmssupport.utoronto.ca](http://www.cmssupport.utoronto.ca) as well as the CMS help files.

On your draft form, indicate the question type you will use for each question.

### Response required selector on each question

Use only for imperative information that you must have to successfully completes your objective with the form.

### Respondent types an answer into a text box

(e.g. addresses, comments)

### Text (Single line)

Use this question type when you want to provide a single text line for entering the answer. It is used for collecting address information lines and other single-line text answers such as the one shown below.

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Please enter a question for us to ask you should you forget your password.

REQUIRED

## Text Area

Use this question type when you want the respondent to provide a lengthy text answer. The maximum number of characters allowed for each Text Area box is 32,000. There is no limit to the number of Text Area questions you can include in your system.

Please describe the work performed in your most recent position.

REQUIRED

## Telephone Number

Use this when you want the respondent to provide a telephone number. The red text shown below is automatically added beside the phone number field.

Respondent chooses a single answer from a set of answers

## Radio Button

(Small number of possible answers)

Use this question type when a respondent must choose a single answer from a small number of possible answers.

The system does not permit more than one radio button to be selected.

Use for a list of 5 or less answers.

**How many helpings of carrots do you eat each day?**  
REQUIRED

1-3 servings  4-6 servings  6-10 servings  none

## List

Single Selection large number of possible answers

Use this question type when a respondent must choose a single answer from a large number of possible answers. This type of selection box does not permit more than one selection.

**Select your first choice of menu options from the list below.**  
REQUIRED

**Sort of**  
**Not really**  
**Very well**  
**Never tried**  
**Menu E - Free Range Chicken**

## Drop-down List-

Single Selection

Uses less space on the page than Radio Buttons and List question types.

Use this question type when a respondent must choose a single answer from a drop-down list of possible answers.

**Please select your favourite colour from the list:**  
REQUIRED

**Blue** ▼

Respondent chooses multiple answers from a set of answers

## Checkbox

Use this question type when a respondent can make multiple selections from a small set of possible answers.

**Which of the following magazines do you read?**  
REQUIRED

Atlantic Monthly  Harper's  The New Yorker

## List (Multiple Selections)

Use this question type when a respondent can make multiple selections from a large set of possible answers. Respondents can hold down the CTRL/CMD key and click on the multiple selections with their mouse.

**Select your areas of interest from the list below. (Hold down the CTRL key and click on multiple selections)**  
REQUIRED

Astronomy  
Biology  
Earth and Ocean Sciences  
Fine Arts - Music  
Humanities

## Email question type.

Use this question type when you need to collect an email address from the respondent. The red text shown below is automatically added beside the email field.

**Please provide your email address for receiving program updates.**  
REQUIRED

Enter a valid email address.  
Example: name@company.com

## Email Results

Provides a field into which the respondent can enter an email address. A copy of the user's survey results are then sent to the address in this field.

## Email Results to Group

This question type provides a field from which the respondent selects a group. A copy of the user's survey results are then sent to each member of the group.

## Date

Use this when you want the respondent to provide a date, such as their birth date.

## Date / Time

Use this when you want the respondent to provide a date and a time such as the date and time they were born.

## Country

Use this question type when you want the respondent to select a country for their answer. The list already contains all of the world's countries so you do not need to create the list.



Please select the last country you visited from the list below.

REQUIRED

Select a Country

## Description

Use this when you want to add some instructions or other text in between questions or sections. This type of text on a survey has no answers as it is used only for displaying information for the survey respondent.



The next section of the survey is for people with dependants only. Please proceed to section C if you do not have dependants.

## Category breaks



Enter the Question Text for the category break. This text appears as a section title would.

Attachment -DO NOT Use

Rank -DO NOT Use

Page -Break DO NOT Use

## Putting it all together

Use this procedure to create an online survey or form that respondents can complete and submit. Work from your hard copy outline that you have created. Save and publish your work often when building forms.

Log onto the IronPoint CMS.

Locate the parent page for the new survey/form and click .

On the Child Pages tab, click  and select Survey.

Complete the fields in the Page Summary section.

**Title** - this is a required field. The title you enter here appears at the top of the page you are creating. It is also the text that becomes the link to this page. The font style, size and color are pre-determined by design templates. You cannot change them.

**URL Title** - this is a required field for friendly url addresses.

Use only alphanumeric characters in the URL Title field. All other characters will be converted to underscores. Also note that if you use a "/" or a "." in this field, the system assumes that the "/" is specifying a directory and that everything after the "." is the file extension.

**HTML Title** - The title you enter here gets entered into the HTML <Title> tag, which is the field that Search Engines look at when scanning the web. In other words, you can use this field to enter a title that will optimize your site's ranking in the list of search results. If you leave the field blank, the system uses the contents of the Title field.

In the General Properties section, enter the optional Teaser text.

The Teaser field briefly describes the content of the current page.

Complete the Survey Properties section.

Page title-

URL title

HTML title- DO NOT use

Response Limit – DO NOT Use

Open in New Window - DO NOT Use Not advisable due to security timeout.

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Check this if you want the survey or form to open in a new window.

Email Survey To - enter the email address of the person who should receive the completed survey or form. Leave blank if you do not wish to receive an email for every submission.

Show Response Preview Page – Not advised if the form is more than 5 questions long.

Check this checkbox if you want your site's users to be able to Preview a printable copy of their surveys prior to submitting them. See Email results question.

Click Save.

Enter Introduction Text. This text appears above the form content.

Enter Conclusion Text. This text appears below the form content.

Enter the Thank You Text.

Click Save and submit for publication.

In the Survey Questions section, add questions and fields as required. See Adding questions.

Questions can be moved up or down if they are in the wrong area of the form.

Page breaks are automatically created by the system.

# Question editor overview

The Question Editor is opened any time you add questions or other types of data collection fields to a form or survey page.

Below is a picture of the Question Editor opened on a Survey page.

The screenshot shows the Question Editor interface. At the top, there is a navigation bar with 'Manage', 'System', 'Back to Site', 'My Sites', and 'M:'. Below this is the 'QUESTION EDITOR' title and a breadcrumb trail: '> Home Page > Product Preference Survey > Question Editor'. The main content area is divided into three sections: 'CHECKBOX ON PAGE 1', 'ANSWERS', and 'PREVIEW'. The 'CHECKBOX ON PAGE 1' section contains a 'Question Text' field with the text 'Please select your 3 favorite colors from the following list:', a 'Question Type' dropdown set to 'Checkbox', a 'Question Placement' dropdown set to 'Top', a 'Response Required' checkbox that is checked, and an 'Answer Columns' dropdown set to '5'. The 'ANSWERS' section has a table with columns 'ORDER' and 'CAPTION (CLICK ON TEXT TO EDIT)'. The table contains five rows with order numbers 1 through 5 and captions 'Blue', 'Green', 'Yellow', 'Orange', and 'Red'. Below the table is an 'Add Answer' button. The 'PREVIEW' section shows a preview of the question with the text 'Please select your 3 favorite colors from the following list:' and a 'REQUIRED' label. Below this is a row of five checkboxes labeled 'Blue', 'Green', 'Yellow', 'Orange', and 'Red'. At the bottom of the interface are 'Save' and 'Cancel' buttons.

The topmost section (Checkbox on Page 1) of the Question Editor captures the question text as well as the question type, placement and formatting information.

The Answers section of the Question Editor is used for entering lists of possible responses from which your users will choose when answering the questions.

The Preview section shows what the question will look like once it is published on the form or survey.

Note: The fields available in the Question Editor depend on the type of question you are creating.

