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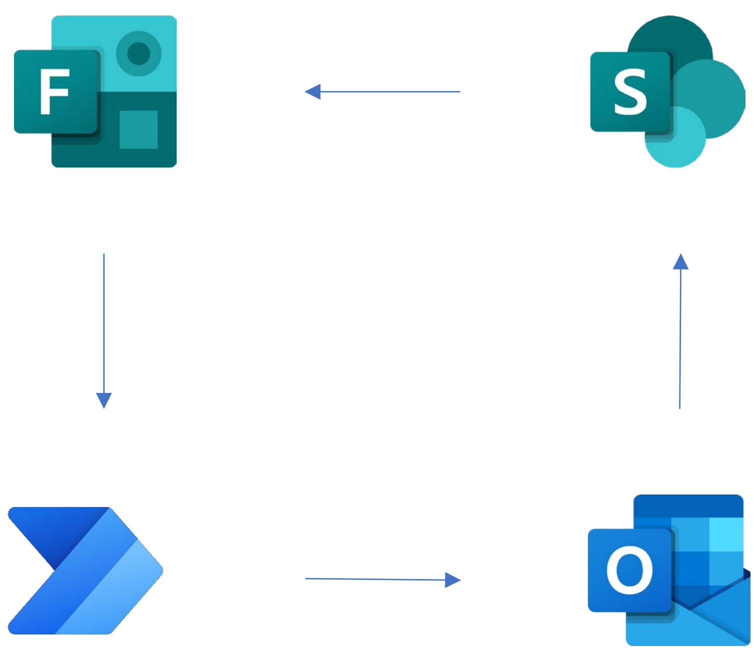
Microsoft 365



Introduction

This instruction is a guide for creating Microsoft Forms and capturing their responses in Microsoft SharePoint using Microsoft Power Automate for efficient data collection and management. The step-by-step instructions cover the creation of Microsoft Forms, the setup of SharePoint lists for storing form data, and the process automation of capturing form responses into SharePoint using Power Automate.

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Microsoft Forms

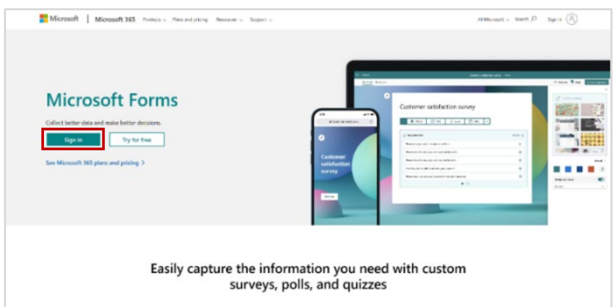
Microsoft Forms is a versatile tool that empowers you to create surveys, quizzes, and data collection forms. This comprehensive guide will lead you through the essential steps of using Microsoft Forms to gather data, feedback, or insights. You'll discover how to create forms, design questions, and analyze the results.

1. Sign into Microsoft Forms

You can access Microsoft Forms in two different ways:

Via Web Browser (Online Version):

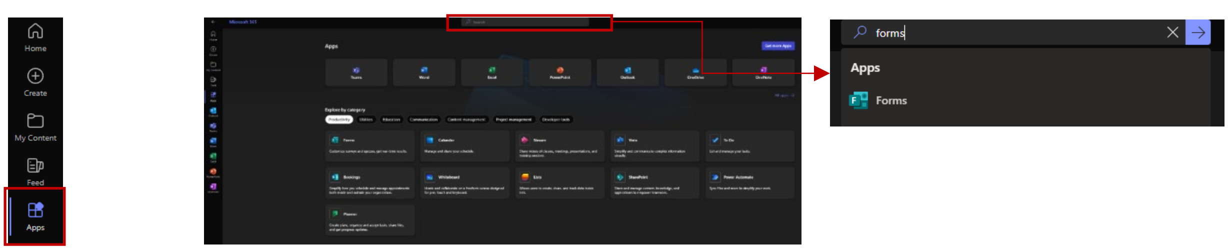
1. Open a web browser.
2. Visit forms.microsoft.com.
3. Click on the "Sign In" button.
4. Enter your Microsoft account email and password.
5. Click "Sign In."



Using Microsoft 365 Desktop Software:

If you have Microsoft 365 desktop software, you can also access Microsoft Forms directly from your apps. Here's how:

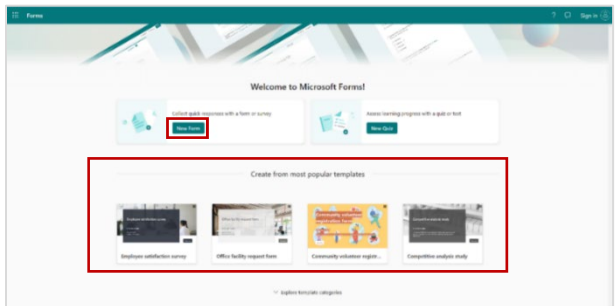
1. Click on "Apps" in your Microsoft 365 suite.
2. Search for "Forms."
3. Click on the "Forms" application to access it.



2. Create a New Form

To create a new form:

- On the dashboard, click on the "New Form" button to create a new form from scratch. For following this instruction click on “New Form”.
- Alternatively, you can explore and choose from a selection of pre-designed form templates.

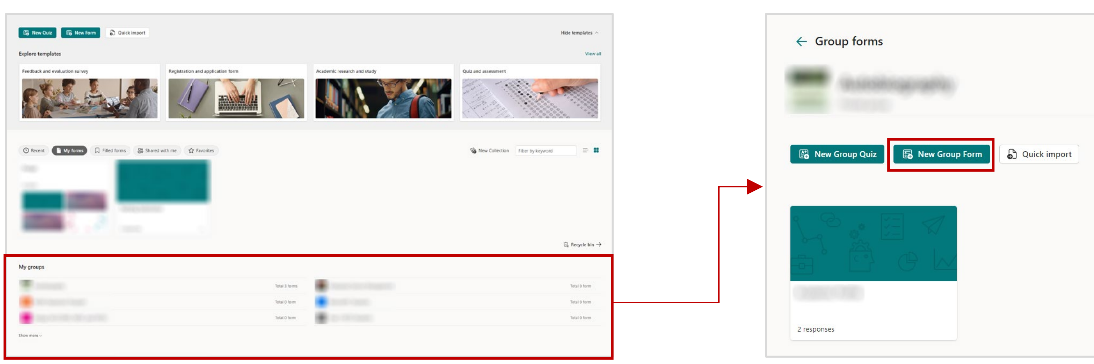


3. Personal vs. Group Forms

When creating a new form, it is automatically associated with your account by default, giving you exclusive rights to edit, manage, and access the results. On the other hand, group forms are linked to specific Office 365 groups, allowing all members of the group to view and edit them. In summary, personal forms are private and can only be accessed by the creator, while group forms are shared among a designated group of people.

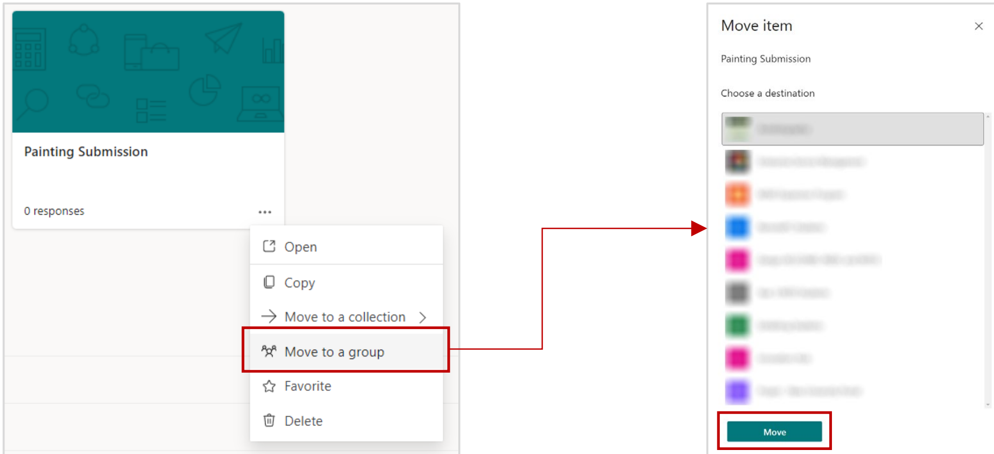
Creating a Group Form:

To create a group form, choose the desired group from the "My Groups" list and click on "New Group Form."



Converting a Personal Form to a Group Form:

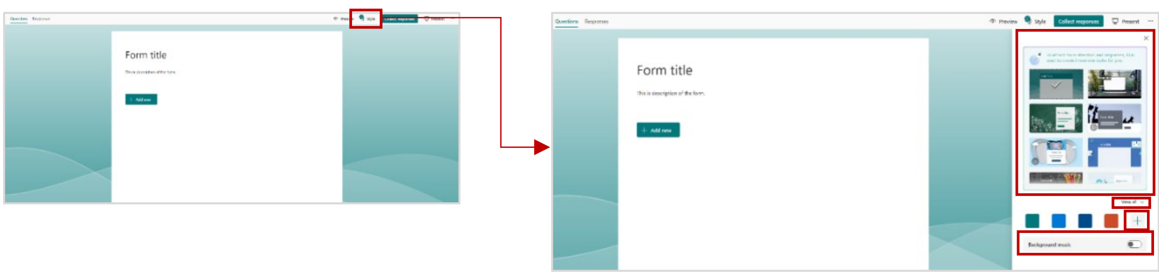
1. Click on "More Options" for the personal form you want to convert.
2. From the menu, select "Move to a group."
3. Choose a destination group.
4. Click the "Move" button to transfer the form to a group form.



4. Customize Form's Appearance and Add Music

To personalize your form's appearance and add background music (optional) in Microsoft Forms, follow these steps:

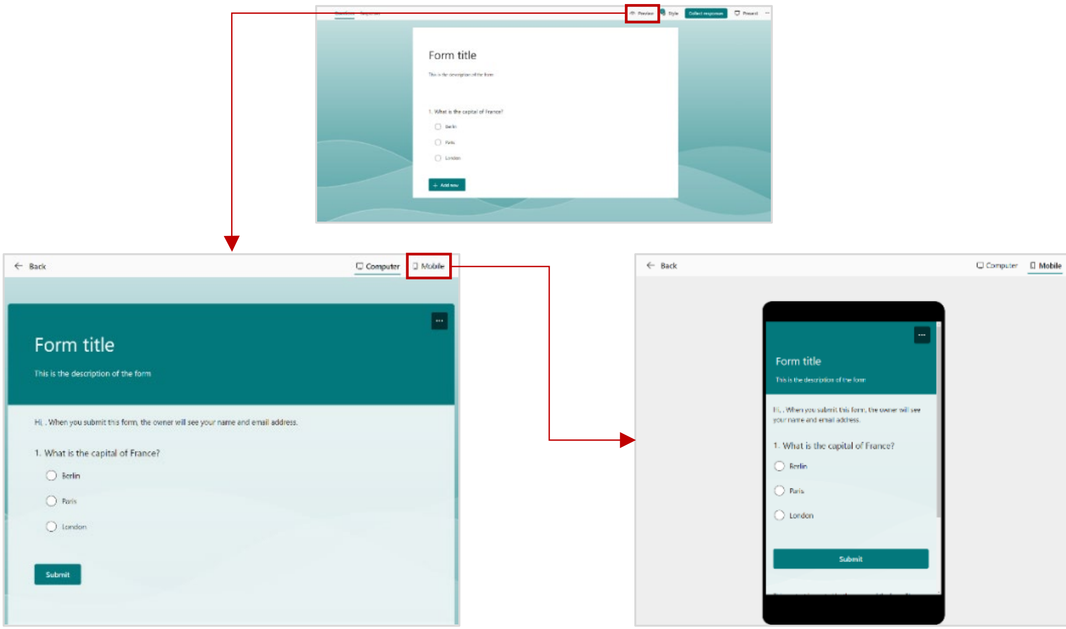
1. Click on the "Style" button located at the top-right of the form editor.
2. In the top section, you'll find pre-designed styles created by AI. Choose one that suits your form's look.
3. For more customization options, click on "View all" to explore additional colors and backgrounds.
4. To create a completely customized theme, click the "+" (plus) button labeled "Customized Theme", and add a new color and background.
5. To add background music to your form, toggle the "Background music" switch. Use the drop-down menu to select background music from the available options.



5. Preview a Form

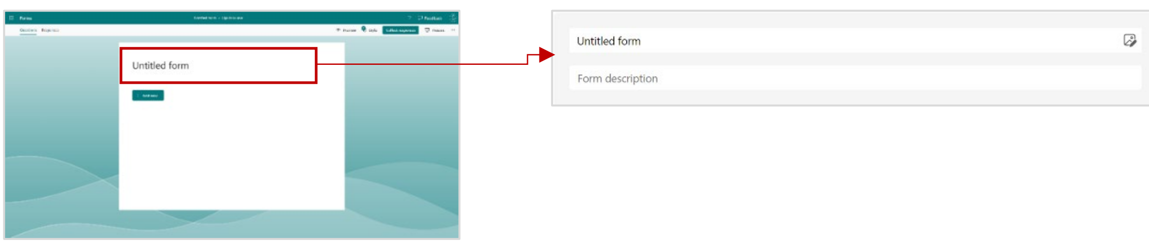
To view your form as it will appear to respondents, follow these steps:

1. Click "Preview" to see the complete form.
2. To preview how your form will look on a mobile device, click the mobile device icon.

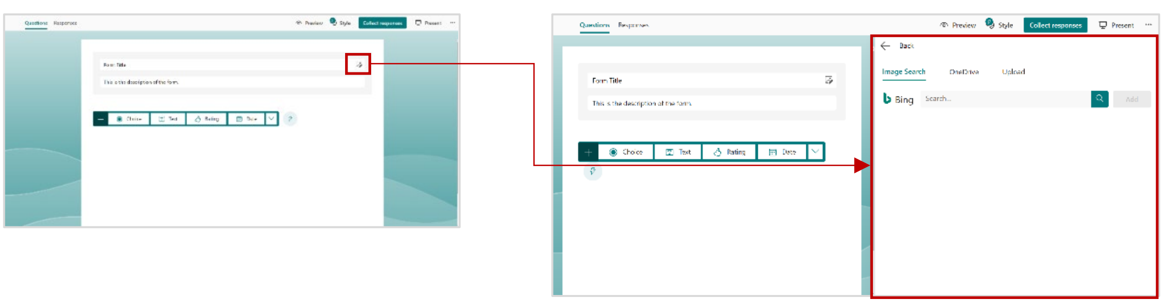


6. Title, Description, and Image

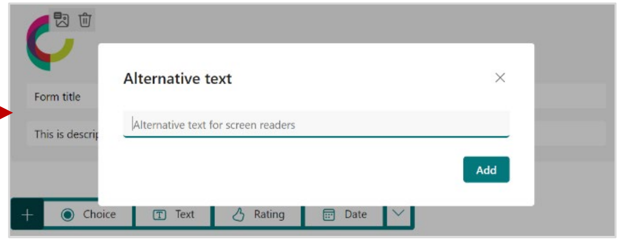
1. To give your form a title and description, click on "Untitled form."



2. To insert an image, click on the image icon. You can search for an image, upload it from OneDrive, or your computer.



3. After uploading an image, you can add alternative text for screen readers or delete the image.



7. Question Types

To create a new question, click the "+ Add new" button and choose the question type you want to add. Microsoft Forms offers a range of question types, such as:

Multiple choice: To create a multiple-choice question, begin by clicking the "Choice" button. Then, input your query and choices into the designated fields. Should you require more options, simply click "+ Add option." Enable respondents to input their own answers by selecting "Add 'Other' option," or allow for multiple selections by choosing "Multiple answers." For additional customization, click the ellipse button to access settings such as shuffling options and choosing display formats like drop-down menus or radio buttons. If adjustments are needed, hover over an option to delete or rearrange it. Keep in mind that on mobile devices, choice questions are presented as drop-down menus.

Text: To generate a text question for gathering responders' answers, simply click the "Text" button. This action prompts a blank text question to appear, where you can input your inquiry into the provided text box. If you anticipate longer responses rather than short ones, you have the option to select "Long answer" to accommodate this. Access additional settings by clicking the ellipse button, where you can establish numerical restrictions through "Restrictions," with further options available by clicking the down arrow.

Rating: To craft a rating question for responders to rate something, click "Rating." This prompts a blank rating question to appear, where you can input your question in the text box provided. Define the rating scale by specifying the desired number of levels; by default, there are five levels, but you can opt for anywhere between two to nine levels. Customize the rating symbol by clicking the symbol box arrow and selecting from the available symbols; the star symbol is the default choice. For further customization, click the ellipse button to access additional settings. Select "Label" to add labels for the first and last items on the rating scale.

Date: To generate a question for gathering information about a specific date, click on "Date." This action prompts a text box to appear, where you can type your date-related question.

Ranking: To incorporate a ranking question, begin by clicking "+ Add new," then selecting "Ranking" from the drop-down menu. Within the empty question box, input your question and the options for ranking. If additional options are necessary, simply click "+ Add option." Utilize the ellipse button to access further settings, including the option to "Shuffle options," which randomizes the order for respondents each time they access the form. For adjustments such as deleting an option or changing its order, hover your mouse over the option and utilize the six-dot icon to rearrange them accordingly.

Likert scale: To create a question with a list of items for ratings, click "+ Add new" and select "Likert" from the drop-down menu. Within the question text box, input your question, statements, and options.

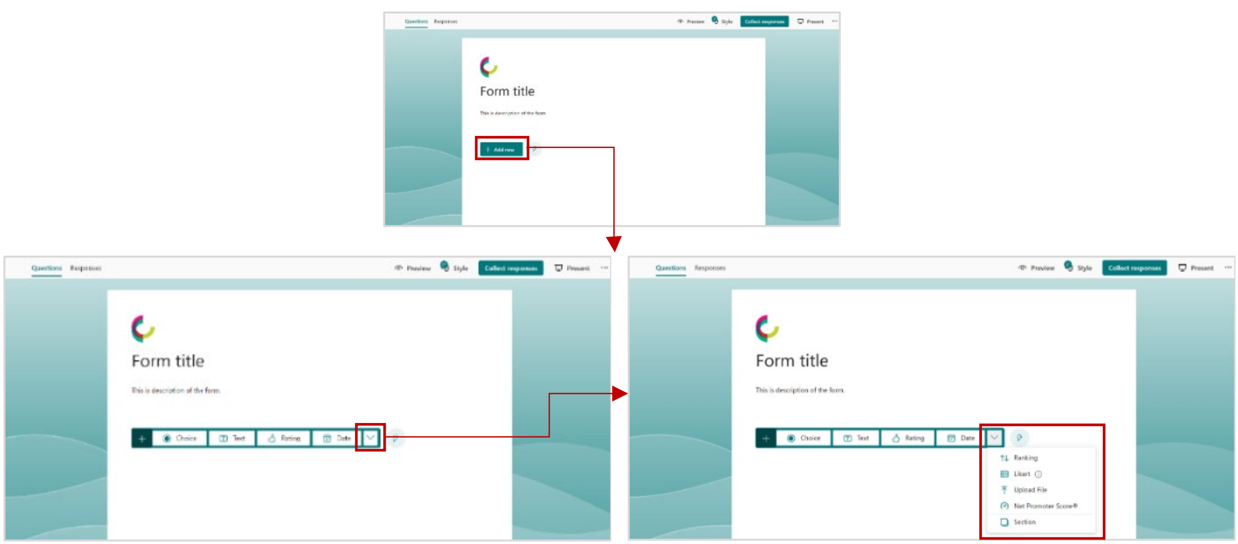
If more options are needed, utilize the plus sign button on the right. To incorporate additional statements, click the "Add statement" button.

Upload File: To enable survey takers to upload files, first adjust the form settings by clicking on the settings button at the top-right corner and selecting "Settings." Note that the option "Anyone with the link can respond" is not available if you have an upload file question in your form; instead, choose "Only people in my organization can respond."

To create a file upload question, click "+ Add new," then choose "File Upload" from the menu. Enter your question in the text box and define limits for the number and size of files respondents can upload using "File number limit" and "Single file size limit." You can also restrict file types by clicking the ellipse button and choosing "File type."

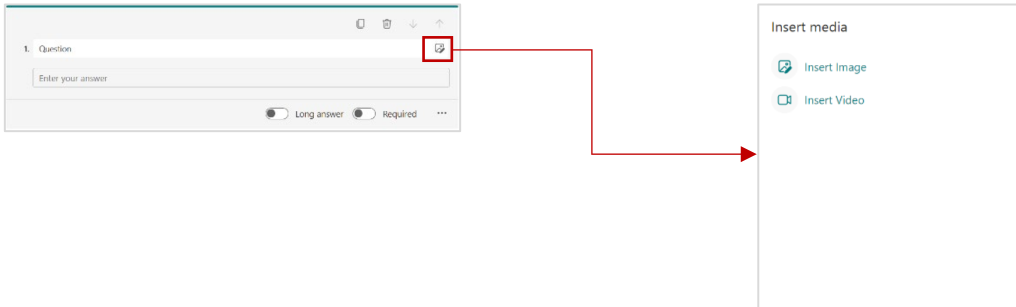
Once a responder submits attachments, you can review them in the responses section of Microsoft Forms. The storage location varies depending on whether it's a single form or a group form. For single Microsoft Forms, attachments are stored in the creator's OneDrive. For group forms or those moved to a group, uploaded files are stored in the Documents library of the SharePoint site associated with the Office 365 group to which the form has been moved.

Net Promoter Score: To assess the likelihood of a form respondent sharing information with a friend or colleague using the Net Promoter Score, proceed as follows: Click "+ Add new" and select "Net Promoter Score" from the drop-down menu to add the relevant question. Enter your query in the provided text box. While the standard 0 to 10 scale cannot be altered, customize labels by clicking on them and typing new labels as required.

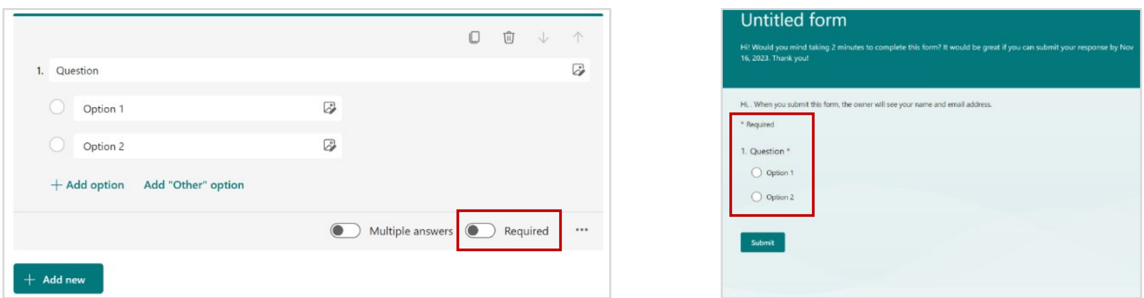


8. Customize Forms

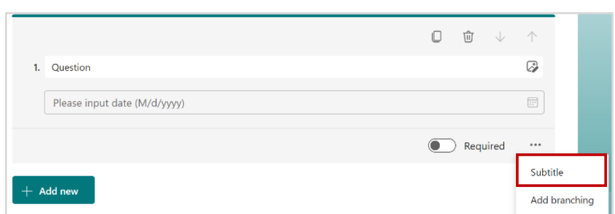
Add an Image to a Question: To enhance your questions with images or videos in Microsoft Forms, click on the image icon associated with the question you want to insert media into.



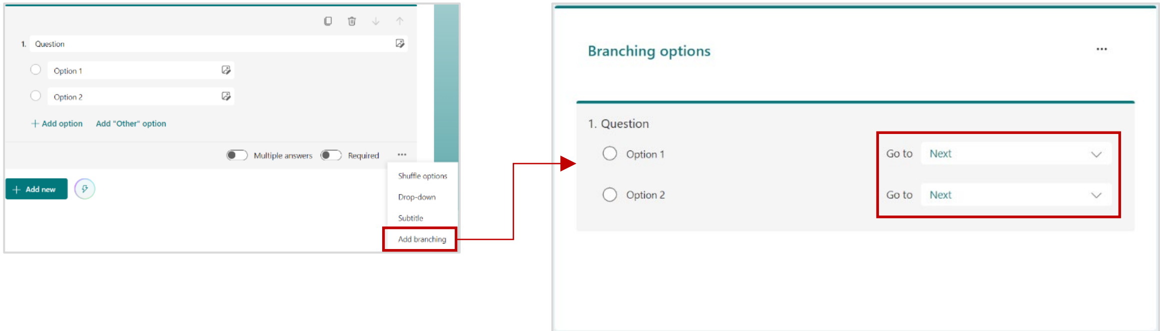
Require an Answer to a Question: To make a question mandatory and ensure responders don't skip it, in the bottom right corner, locate the "Required" button. Click the switch from white (not required) to green (required). Once the question is marked as required, a red star will appear next to it when previewed, indicating its mandatory status. Responders will be unable to submit the form until they answer the required question.



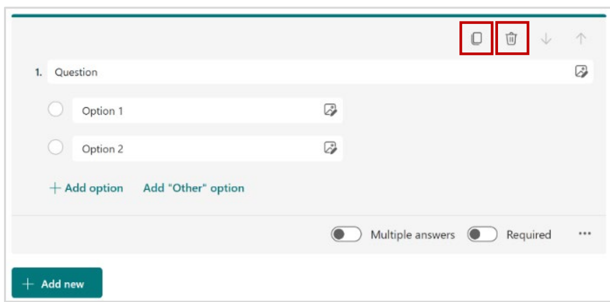
Add a Subtitle to a Question: To offer additional context or information about a question, click on the ellipse button and select "Subtitle."



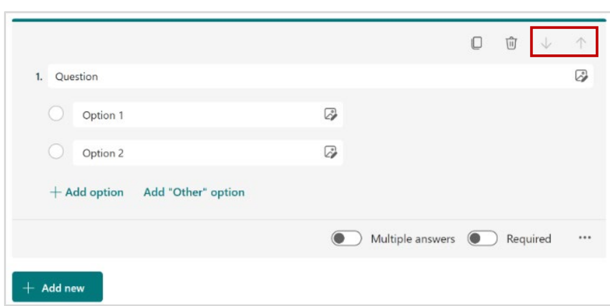
Add Branching: Branching offers the flexibility to tailor the form experience by displaying or concealing questions depending on users' responses. Here's how to implement branching: Click on the ellipsis (three dots) button and choose "Add Branching." Once added, branching options will appear beside each response choice in the question. Unlike the default progression where all respondents move to the next question, branching allows you to assign distinct follow-up questions for each response choice, providing a more personalized survey experience.



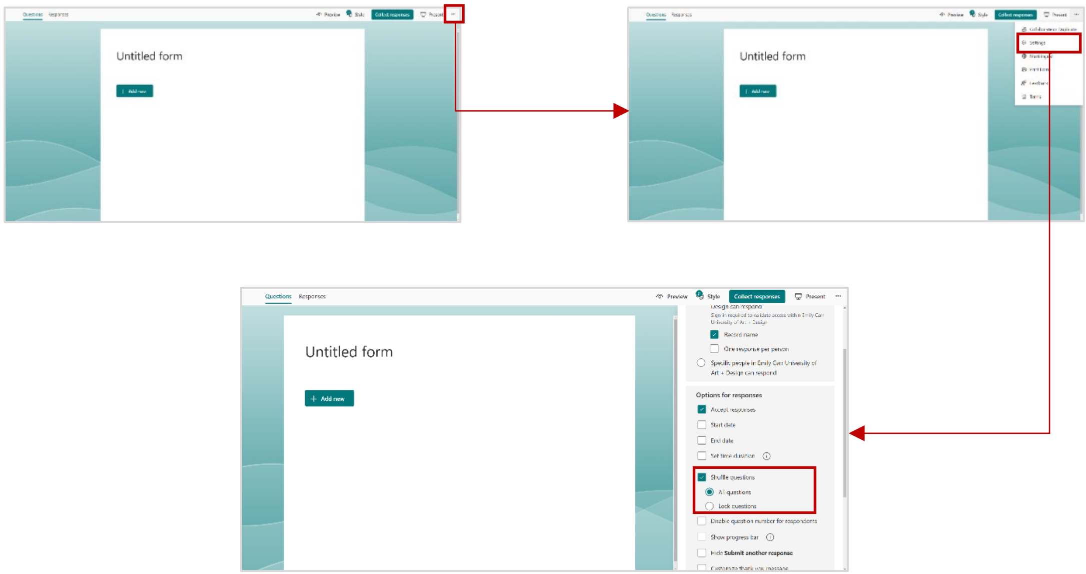
Copy or Delete a Question: To duplicate or delete a question in Microsoft Forms, simply follow these steps: Click on the question to activate it, then locate the copy and delete icons positioned in the top-right corner of the question box.



Change the Order of Questions: To adjust the sequence of questions, in the top right corner, you'll see two arrows that enable you to move the question up or down accordingly.



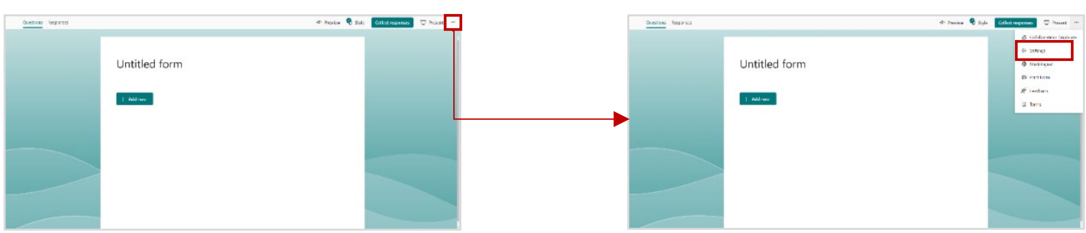
Additionally, if you prefer to randomize the order of questions each time someone accesses the form, follow these instructions: Click on the "More Forms Settings" button, select "Settings," and under the "Options for Responses" section, check the "Shuffle Questions" box. You have the flexibility to shuffle all questions or lock a specific number to maintain their order.

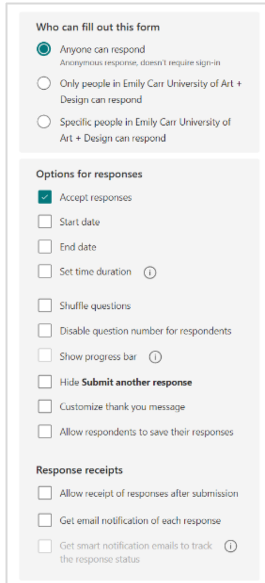


9. Form Settings

To manage who can access your form and customize its settings in Microsoft Forms, follow these steps:

1. Click on "More Form Settings" located at the top right corner, and then select "Settings."
2. In the first section, "Who can fill out this form," you can choose to allow anyone with a link to respond or limit responses to people in your organization. Note that Microsoft Forms has certain restrictions when allowing file uploads: the "Anyone with the link can respond" option is not available when you include an upload file question. File upload is only possible when "Only people in my organization can respond" is selected.
3. In the "Options for Responses" section, you can further customize your form's settings. This includes choosing whether to accept responses, setting a start and end date and time for responders to complete the form, and shuffling the questions to randomize the order. You can also customize the thank-you message displayed to responders upon form submission.
4. The "Response Receipts" section in the settings allows you to configure notification emails for both the form owner and responders whenever a form is submitted.

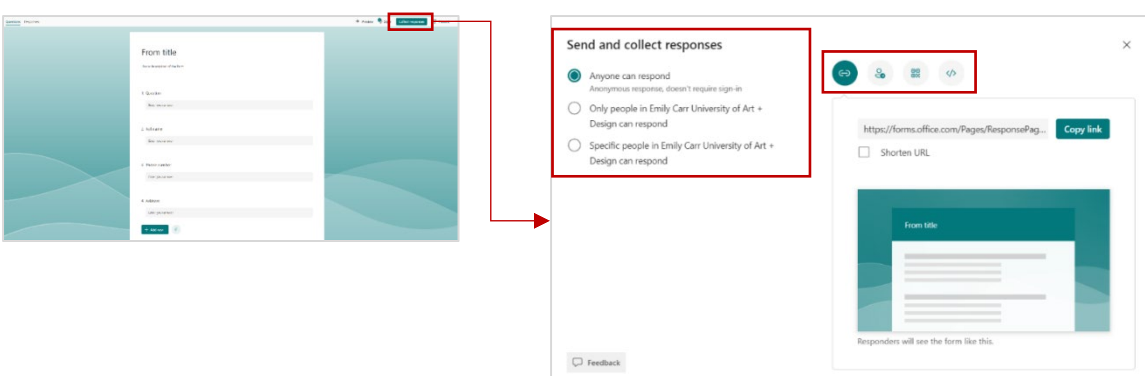




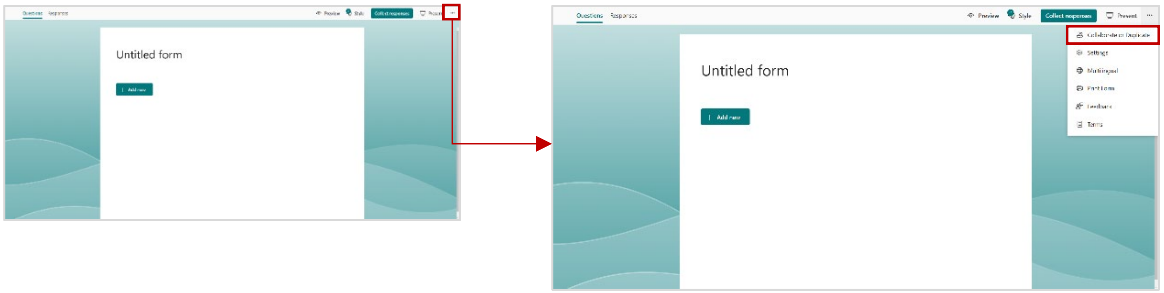
10. Share a Form

Once you've created a form and are ready to share it with your audience, follow these steps:

1. Click the green "Collect responses" button at the top right.
2. You'll find several sharing options, including sending it via email, creating a website link, or generating a QR code.
3. Choose whether you want anyone with the link to respond or restrict responses to people in your organization. Note that when allowing file uploads, the option "Anyone with the link can respond" is not available; file upload is only possible when "Only people in my organization can respond" is selected in the settings.
4. On the right side of the screen, you have four sharing options:
    - "Link" provides you with the shareable link.
    - "Invitation" allows you to invite your audience to respond via Outlook or Teams.
    - "QR code" lets you create and download a QR code for easy access.
    - "Embed" generates code that can be pasted into a webpage for embedding.



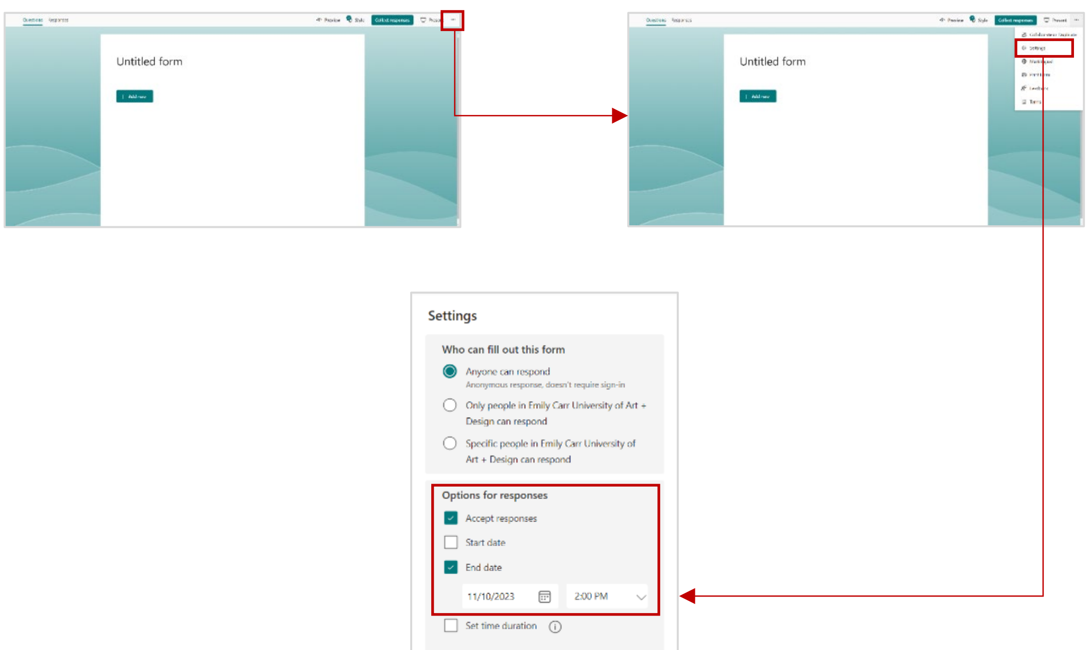
5. You can also share the form as a template or for collaboration by clicking "More Form Settings" at the top right corner, then selecting "Collaborate or Duplicate" to obtain a link.



11. Close a Form

When you need to stop accepting submissions and close your form to further responses, follow these steps:

1. Click "More Form Settings" at the top right corner, then select "Settings."
2. Under "Options for Responses," you have two options:
   - To immediately stop accepting responses, uncheck "Accept Responses."
   - To schedule a specific closing date, check "End Date" and set the desired date.

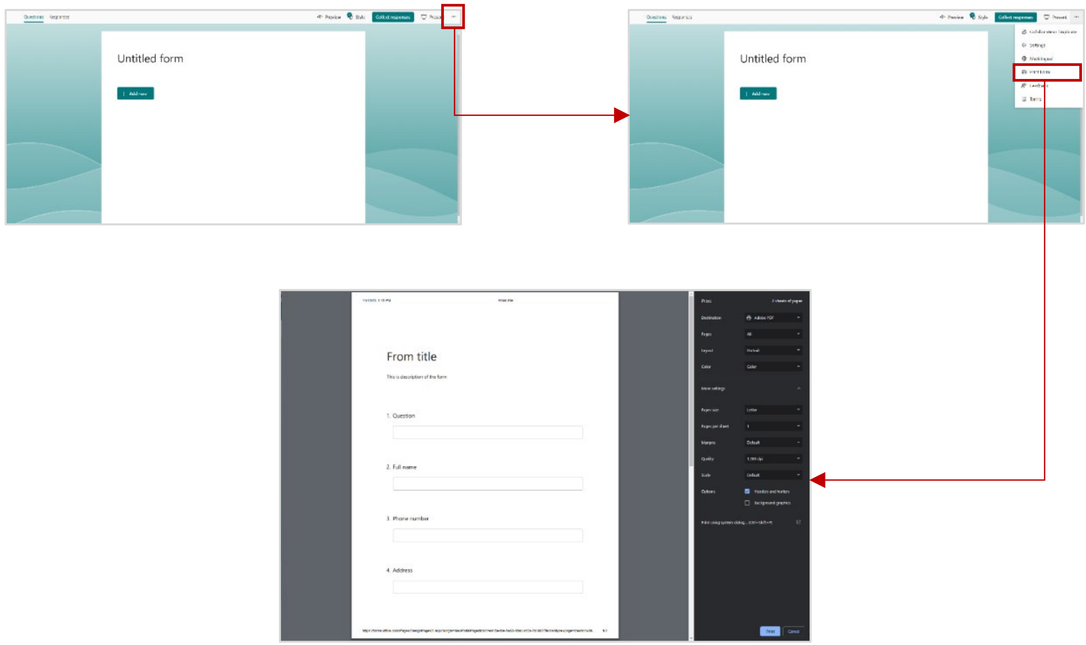


12. Print a Form

If you prefer not to share your form online and need a paper copy or a PDF, follow these steps:

1. Click "More Form Settings" at the top right corner, then select "Settings."

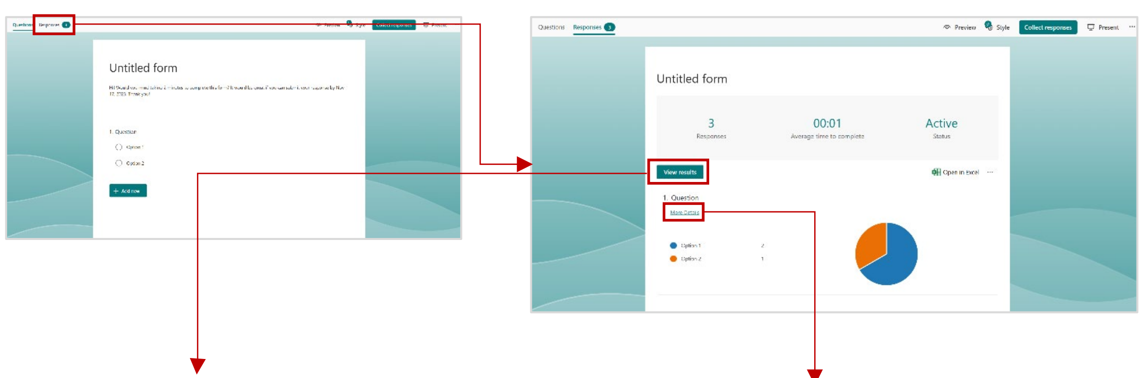
2. Next, click on "Print Form."

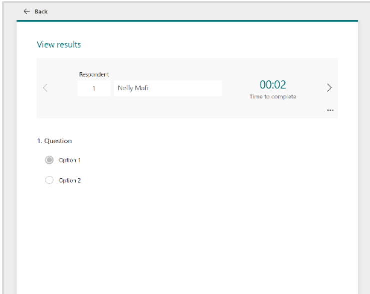


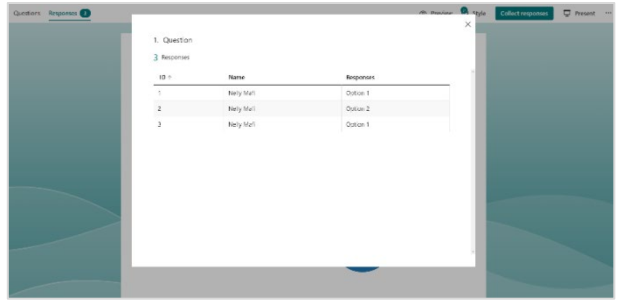
13. Analyze Form Responses

After you've created a form and collected responses, it's essential to analyze the data. Follow these steps to analyze responses in Microsoft Forms:

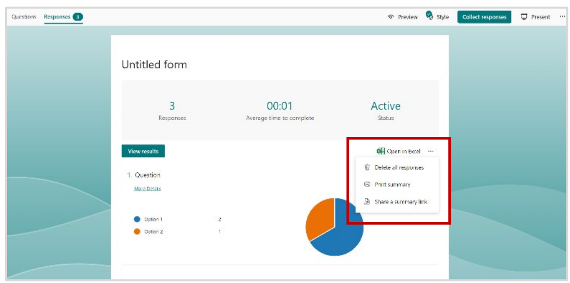
1. Click on the "Responses" tab located at the top left of the form builder to access response analysis.
2. Within the "Responses" tab, you can view the analyzed results of your form. This section provides a summarized overview of the collected data.
3. If you want to perform more in-depth analysis or work with the data in Excel, click "Open in Excel" to export the response data to an Excel spreadsheet.
4. Click on the "View Results" green button to navigate through individual responses. This allows you to see how each respondent answered the questions.
5. By clicking on "More Details," you can delve into specific details about each responder's responses within that section.







6. Click on the "More Options" button to access additional functions:
   - You can delete all responses to start fresh.
   - Print a summary for offline reference or sharing.
   - Create a summary link that you can share with others, granting them access to a summary of the responses.



Adding a Form to SharePoint Site

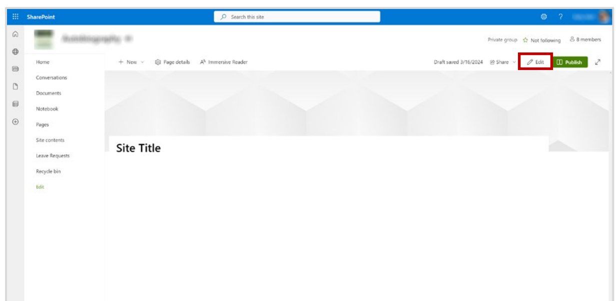
Microsoft Forms and SharePoint integration enables users to seamlessly gather information and collaborate within SharePoint sites. This documentation outlines the step-by-step process of adding a Microsoft Form to your SharePoint site, facilitating efficient data collection and management.

1. Access Your SharePoint Site

1. Navigate to your SharePoint site using a web browser.
2. Log in with your credentials to gain access to the site.

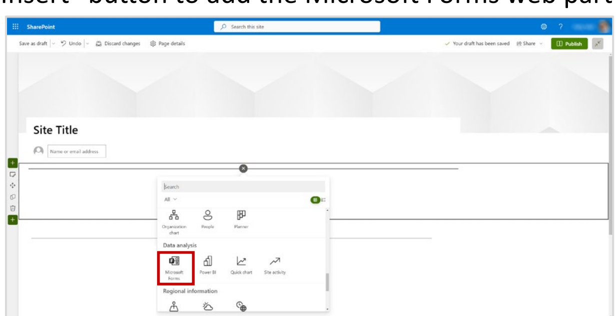
2. Navigate to the Desired Page

1. Choose the page within your SharePoint site where you want to embed the Microsoft Form.
2. Click on the "Edit" or "Edit Page" option to enter the page editing mode.



3. Add Microsoft Form Web Part

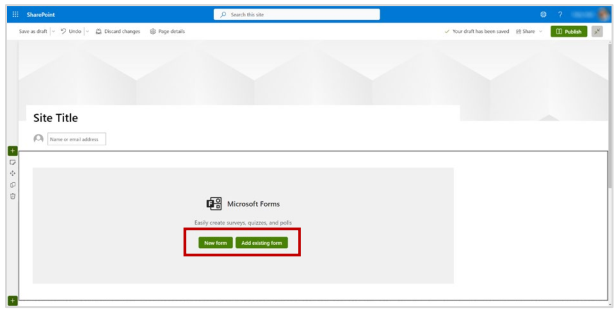
1. Once in editing mode, locate the section or area on the page where you wish to insert the Microsoft Form.
2. Click on the "+ Add a new web part" or similar option to open the web part toolbox.
3. In the web part toolbox, locate and select the "Microsoft Forms" web part.
4. Click on the "Add" or "Insert" button to add the Microsoft Forms web part to your page.



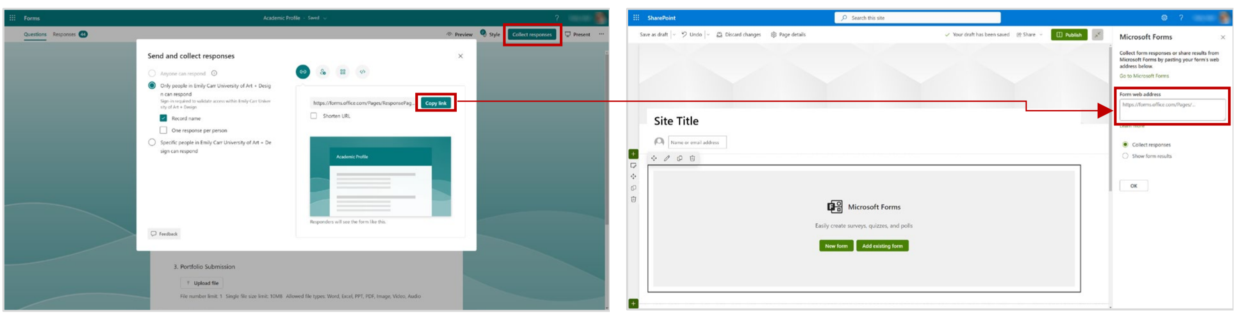
4. Configure the Microsoft Form

After adding the Microsoft Forms web part, you will see an option to connect to an existing form or create a new one.

To create a new form, click on the "Create a new form" option and follow the prompts to design your form using Microsoft Forms.



If embedding an existing form, go to Microsoft Forms, click on "Collect responses," copy the link, and paste it into the Form web address field.



Integrating Microsoft Forms Results with SharePoint Lists

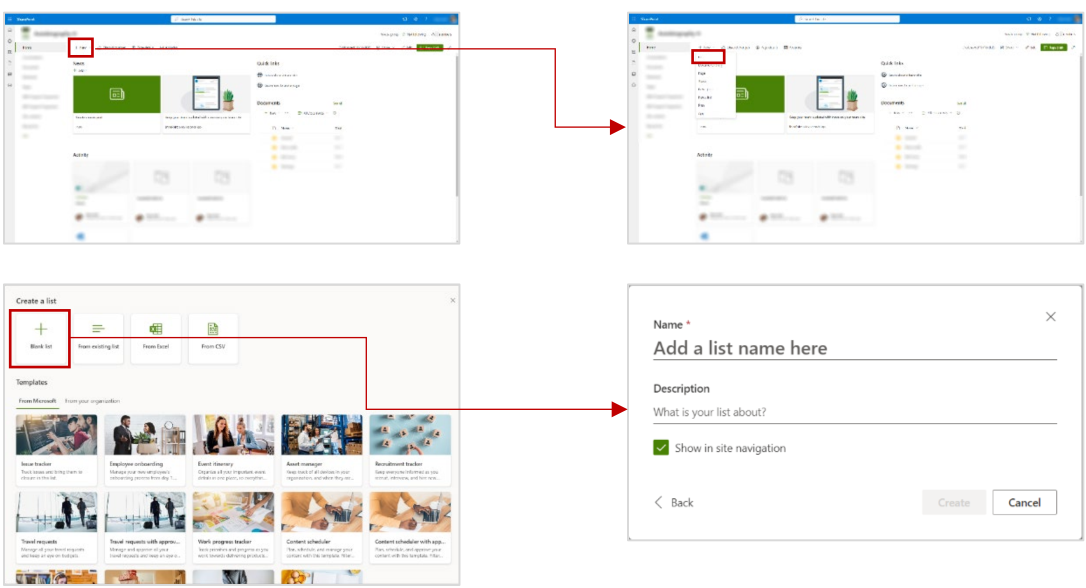
This guide will show you how to capture Microsoft Forms responses to SharePoint using Power Automate. By combining the capabilities of these Microsoft services, you can gather and manage data from Microsoft Forms in your SharePoint lists, enhancing data organization and accessibility. We will walk you through the process of creating a list in SharePoint, a fundamental step that allows you to store and analyze the results of your Microsoft Forms surveys.

1. Access Your SharePoint Site

1. Navigate to your SharePoint site using a web browser.
2. Log in with your credentials to gain access to the site.

2. Create a New List

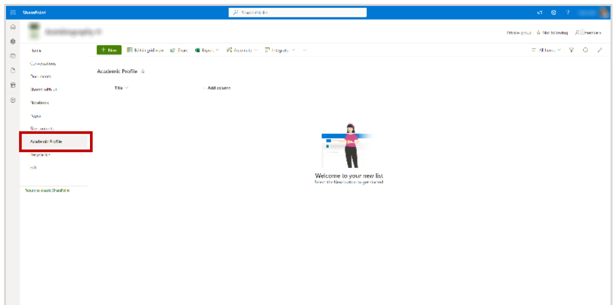
1. Access your SharePoint homepage.
2. Click on "New" and from the drop-down menu, choose "List."
3. Choose the type of list you want to create, for this tutorial, create a blank list.
    - Blank list: Ideal for creating a custom list to suit your specific needs.
    - Duplicate an existing list: If you want to replicate an already existing list.
    - Import a list from Excel or CSV: Useful for importing data from spreadsheet files.
    - Choose from Microsoft templates: Start with a predefined template.
4. Give your list a name and description.
5. If desired, check "Show in site navigation" for easy access.
6. Click "Create" to finalize the list creation.



3. The List

Once you've created your list, it will be accessible from the navigation bar. To open your newly created list, follow these steps:

1. Go to the navigation bar on your SharePoint site.
2. Locate and click on the list you've just created.



4. Column Types

To create a new column for your list, follow these steps:

1. Click on the "Add column" option.
2. From the list of available column types, choose the one that suits your data requirements.

Note that to capture the form responses to the columns, the columns should correspond to the fields that you created in Microsoft Forms. Power Automate will build the links between Microsoft Forms questions and the SharePoint Lists columns.

SharePoint provides a variety of column types to cater to different data needs, including but not limited to:

Text: The "Text" column type is designed for concise, single-line data entries, allowing for input of up to 255 characters. If desired, you can further customize the column by clicking on "More options" to specify the maximum number of characters allowed for entries in this column.

Multiple Lines of Text: The "Multiple Lines of Text" column type is tailored for extensive, multi-line text and numeric entries, accommodating a maximum limit of 63,999 characters. For additional customization, click on "More options" to enable "Use enhanced rich text," allowing users to utilize basic formatting features such as bold, italics, bulleted or numbered lists, colored text, hyperlinks, pictures, and tables. Furthermore, you have the option to enable "Append Changes to Existing Text," which permits users to add new text to an item without replacing existing content, while also logging the date and time of each entry. If you choose not to enable this option, new text will replace existing content in the column.

Choice: The "Choice" column type facilitates user selections from a predefined list of options, making it advantageous for maintaining data consistency by restricting stored values to a predetermined set. Define the list of choices by specifying the exact values users can select, replacing the sample text in the

"Choices" box with your desired options, each on a separate line. Additional choices can be added as needed by clicking "Add Choice." To allow users to enter values not in the predefined list, enable custom choices by toggling on "Can add values manually." Conversely, to restrict users to the provided list, toggle off this option. Users can select their choices from either a drop-down menu or option buttons, with the selection format customizable under "More options" by navigating to "Display choices using." Additionally, enable users to make multiple selections by toggling on the "Allow multiple selections" option.

Date and Time: The "Date and Time" column type is tailored to store calendar dates and both dates and times. The specific date format displayed is contingent upon the regional settings configured for the site. If the desired format is unavailable, site administrators can incorporate support for the appropriate region. Determine whether to include only the calendar date or both the calendar date and time by toggling the "Include Time" option. Additionally, the "Friendly format" setting ensures that dates and times are presented in a user-friendly, easily understandable format, thereby enhancing the overall user experience.

Person: The "Person" column simplifies the creation of a searchable list of individuals and groups, aiding users in selecting from this list when adding or editing an item. For example, in a Tasks list, a "Person" column named "Assigned To" can furnish a list of individuals to whom a task can be assigned. The contents of this list are determined by how directory services and SharePoint groups have been configured for the site. Grant users the flexibility to select multiple options or restrict selections to just one option by toggling the "Allow selections of Groups" box. Activate the "Show profile photos" feature to display profile photos of individuals. For added flexibility, enable "Allow multiple selections" via "More options" to permit users to choose multiple options simultaneously.

Number and Currency: The "Number" and "Currency" columns offer effective management of numerical values unrelated to monetary figures, each tailored to specific use cases while facilitating storage and presentation of numerical data. For the "Number" column, suitable for non-financial numeric data requiring mathematical calculations and where high precision isn't critical, choose "Number" from the list. Utilize the "Preview" feature to visualize data presentation, specify decimal places, enable "Use thousands separator," and set minimum and maximum values as needed. Conversely, the "Currency" column, intended for financial calculations requiring absolute precision, provides 15 digits to the left and 4 to the right of the decimal point. Follow similar steps to create this column, specifying the number of decimal places and selecting the appropriate currency format from over 100 options, while also benefiting from enhancements like "Use thousands separator" and setting minimum and maximum values under "More options."

Yes/No: Creating a Yes/No column in enables the storage of true/false or yes/no information through a single check box, offering a straightforward method for user input. The data captured within this column type can be utilized in calculations involving other columns, with Yes corresponding to a numeric value of one (1) and No corresponding to zero (0).

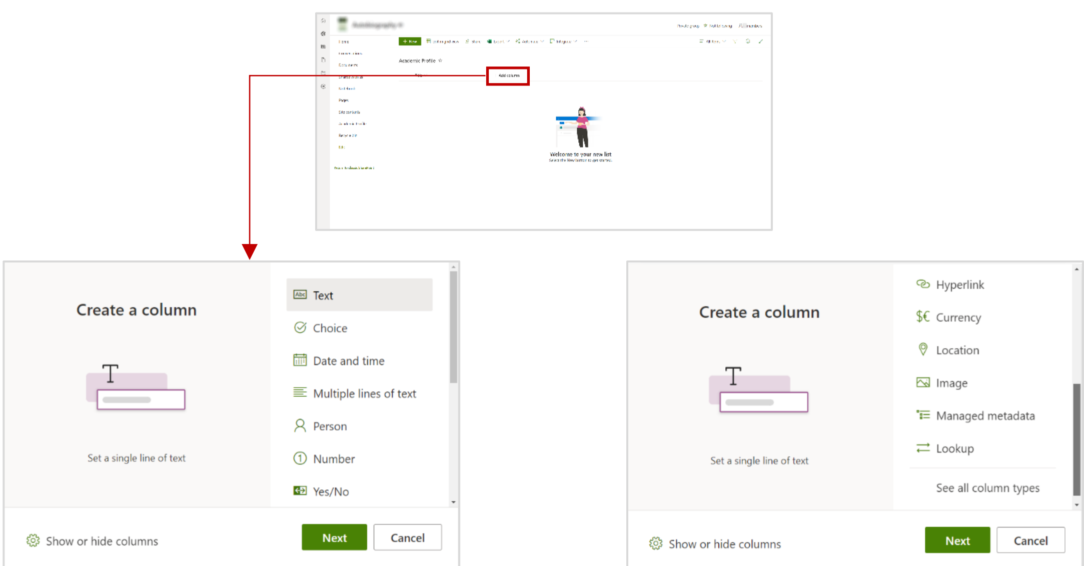
Hyperlink: The Hyperlink column is specifically created to store web links, graphics, or references to other online resources. Users can input Uniform Resource Locators (URLs) for web pages, images, or other online resources into this column. Depending on preference, the column can display clickable hyperlinks or graphics.

Location: The Location column enables the enrichment of data with location information sourced from Bing Maps or your organization's directory. This column offers additional sub-columns, enhancing the filtering, sorting, and searching capabilities of your data. These sub-columns encompass street address, city, state, country or region, postal code, coordinates, or name.

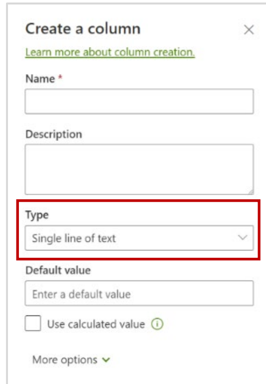
Image: The Image column facilitates the inclusion of images or files into your list, thereby enhancing its visual content and data representation.

Managed Data: Creating a Managed Metadata column can significantly enhance content organization and accessibility by implementing a structured system of labels and tags. Choose the appropriate "Term set or term" for your column, enabling you to define a list of terms relevant to your content, which simplifies content categorization and retrieval within your SharePoint environment. In the "More options" section, customize the "Display format" for the selected value, choosing between displaying just the term label or the complete hierarchical path, including parent terms. Additionally, you can enable "Allow users to type new values" to allow users to contribute new terms if permitted by the term set. Note that enabling "Allow multiple values" will enable the column to hold more than one value, although it may impact sorting in list views.

Lookup: A Lookup column facilitates connections and displays data from one list within another list. Set the source list and specify the source column from the chosen list, establishing relationships and connecting data between columns and lists. In the "More options" section, customize the column further by choosing to "Add additional columns from the source list" to display more data fields from the source list. Additionally, decide whether "Deletions from the source list impact this list" and, if needed, enable "Allow multiple selections" to permit users to select multiple choices.



The "Type" drop-down menu is typically located in the column creation dialog box when you're setting up a new column in SharePoint. It allows you to choose the specific type of column you want to create from the available options.

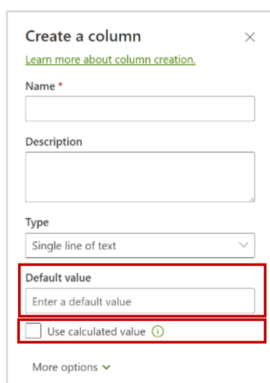


5. Customize Column

Default value: The "Default value" in columns allows you to predefine a value that will automatically populate the column for new items or documents when they are created. It can save time and ensure consistency by providing a standard starting point for the column's data. When creating a new column, you'll usually find an option for "Default value." Depending on the column type, you can set a default value. For example:

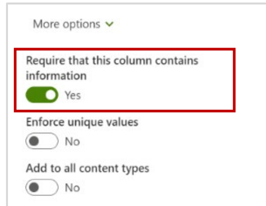
- In a "Text" column, you can enter a default text or placeholder.
- In a "Choice" column, you can select one of the predefined options as the default.
- In a "Date and Time" column, you can set a default date and time.
- In a "Number" or "Currency" column, you can specify a default numerical value.
- In a "Yes/No" column, you can choose "Yes" or "No" as the default.

The "Use calculated value" checkbox in SharePoint enables you to set dynamic default values for columns based on formulas or expressions, ensuring accurate and automated data entry.



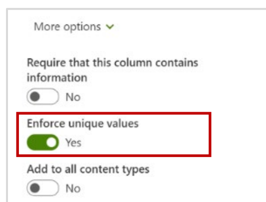
Require a Column to Contain Information: To require a column to have information:

1. When creating a new column or editing an existing one, look for the "Require that this column contains information" option in the "More options" section.
2. Check the box next to this option to enable the requirement.



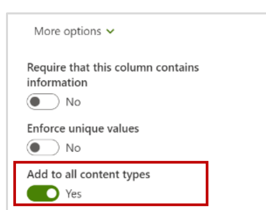
Enforce Unique Values: "Enforce unique values" is a feature that prevents duplicate entries within specific column types, including single line of text, choice, number, currency, date and time, calculated (under certain conditions), lookup (when set to allow multiple values), and managed metadata (configured with a specific term set). It maintains data integrity and uniqueness within the column. This setting varies by column type and isn't applicable to all.

1. When creating a new column or editing an existing one, access the "More options" section.
2. Within the "More options" section, locate the "Enforce unique values" option.
3. Check the box next to this option to enable the requirement.



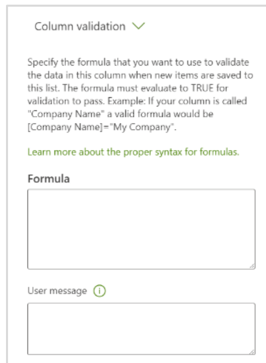
Add to All Content Types: "Add to all content types" is a feature in SharePoint that allows you to include a new column in all existing content types associated with a list or library, as well as any future content types you might create. By enabling this option, the column becomes a part of the default set of fields for all content types, improving data management and ensuring consistency across your SharePoint site. To add a column to all content types:

1. When creating a new column or editing an existing one, navigate to the "More options" section.
2. Within the "More options" section, find the "Add to all content types" checkbox.
3. Check the box to include the column in all content types, both existing and future ones.



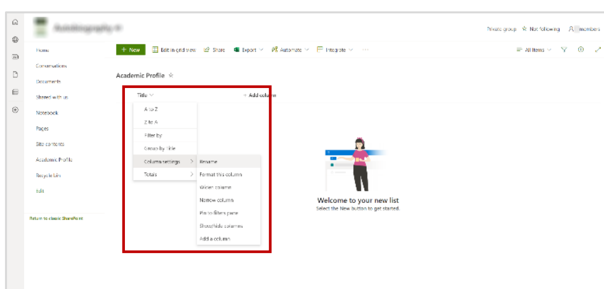
Column Validation: Column validation (optional) allows you to define rules and conditions that data in a column must meet to be considered valid. This feature helps ensure data accuracy and consistency in your lists or libraries. When setting up column validation:

1. Within the "More options" section, look for the "Column validation" option.
2. Enter your validation formula using SharePoint's formula syntax.
3. You can specify conditions that data must meet, such as minimum or maximum values, required formats, or specific keywords.
4. You can provide a custom error message that users will see if they enter data that doesn't meet the validation criteria.



Rename a Column: To rename a column in SharePoint, you can follow these steps:

1. Find the column you wish to rename in the list.
2. Click on the arrow icon next to the column name to open a drop-down menu.
3. From the drop-down menu, choose "Column settings."
4. On the "Column settings" page, you'll see an option to rename the column title.
5. Replace the existing column name with the new name you want.



6. Create New Item

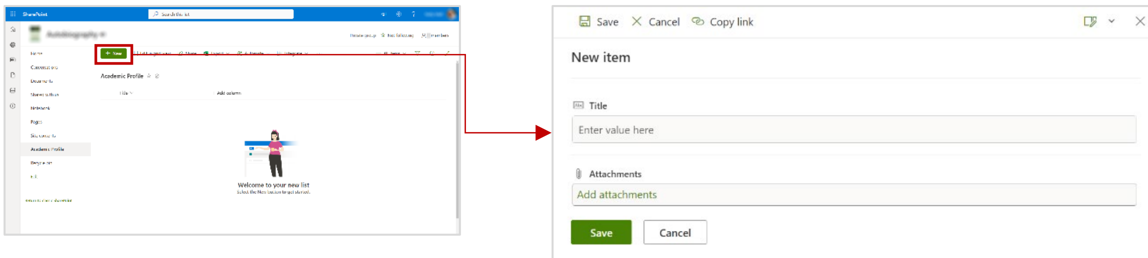
The "New" button in SharePoint lists serves as a convenient way to add new items or entries to the list.

Note that for the purpose of capturing the form responses you will not need to create a new item in the list. Power Automate will do that job for you.

Look for the "New" button, which is typically located at the top of the list view. It is often represented by a button labeled "New" or a plus icon (+).

1. Click on the "New" button.

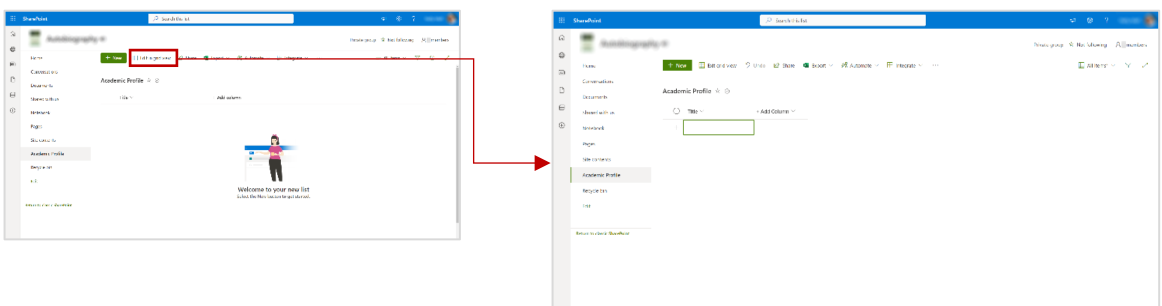
2. You will be presented with a form or template where you can input the necessary information for the new item.
3. Fill out the required details and any additional information as needed.
4. Once you've provided the necessary information, save or submit the new item to add it to the list.



7. Edit the List in Grid View

"Edit in grid view" is a that lets you edit list items in a spreadsheet-like format for quick and efficient data management.

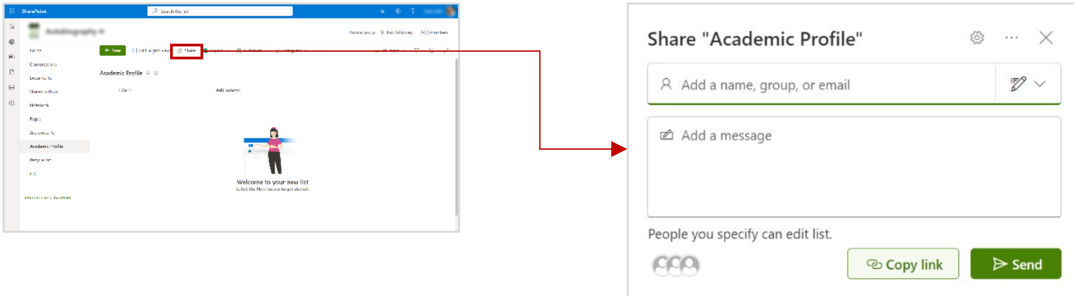
1. Find the "Edit in grid view" option at the top of the list.
2. Click it to switch to the grid view.
3. Edit the items in the grid.
4. Save your changes, and they'll be applied to the list.



8. Share a List

To share a SharePoint list with others, follow these steps:

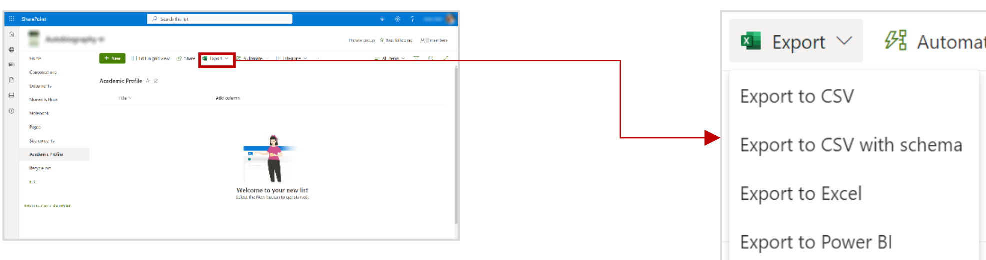
1. Click on the "Share" button found at the top of the list.
2. A sharing dialog will appear, allowing you to enter the email addresses of the people you want to share the list with.
3. Customize their permissions by choosing from options like "Can view" or "Can edit" to control what they can do with the list.
4. Optionally, include a message to provide context or instructions.
5. Click the "Send" button to share the list. The recipients will receive an email invitation and can access the list through the link provided.



9. Export a List

To export a SharePoint list, you can follow these steps:

1. Click on the "Export" button to access the export options.
2. In the drop-down menu, you will find the following export choices:
    - Export to CSV: Use this option to export your list data to a CSV file, which is compatible with spreadsheet applications.
    - Export to CSV with Schema: This option is like CSV but includes the data schema for better compatibility with specific applications.
    - Export to Excel: Select this if you want to maintain your data in Excel format. It will create an Excel file (.xlsx) for use in Microsoft Excel.
    - Export to Power BI: Choose this option to export your data to Microsoft Power BI, a powerful tool for data visualization and business intelligence.
3. Pick the export format that best aligns with your needs. Your data will be downloaded in the chosen format.



10. Create Rules

SharePoint automation improves processes, reduces errors, and saves time, boosting productivity and collaboration with customizations.

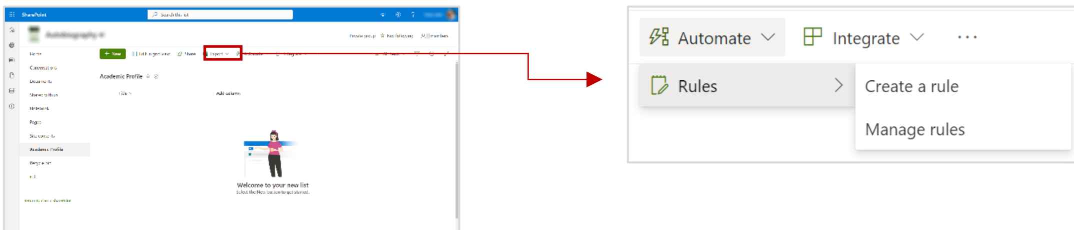
Note that we will not use this feature for automation, and we will use Power Automate.

1. In the toolbar or navigation menu, locate and click on the "Automate" option.
2. Within the "Automate" menu, you'll find an option labeled "Rules." Click on "Rules" to access the rule automation features.
3. In the "Rules" section, you have two main options:
   To create a new rule:
    a. Click on "Create a rule."

b. Define the conditions, actions, and triggers for your rule. Specify when you want the rule to be triggered and what actions it should perform when the specified conditions are met.
c. Save and activate the rule. Your new rule will now run in the background, automating tasks based on the criteria you've specified.

To manage existing rules:

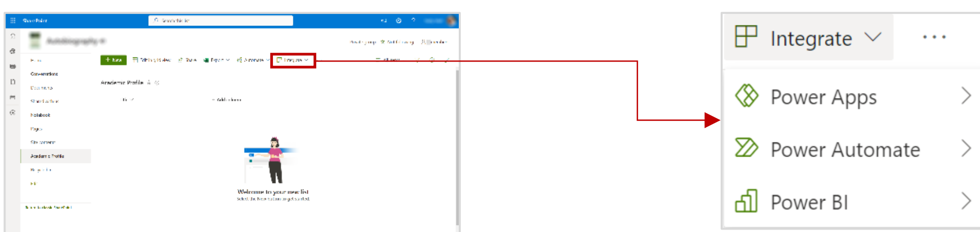
a. Click on "Manage rules" to review and edit rules that have been previously set up in your SharePoint environment. This option allows you to make changes to your existing rules as needed.



11. Integrate SharePoint list with Other Applications

Integrate your SharePoint list with other applications and services to improve data sharing and improve workflows. This allows for improve data exchange and enhanced productivity across different platforms.

1. Click on the "Integrate" option in the SharePoint list menu.
2. Explore the available integration options and select the one that best suits your needs.
3. Follow the prompts and configuration steps provided for the chosen integration method.
4. Test the integration to ensure data is exchanged correctly.
5. Save your settings and configurations.

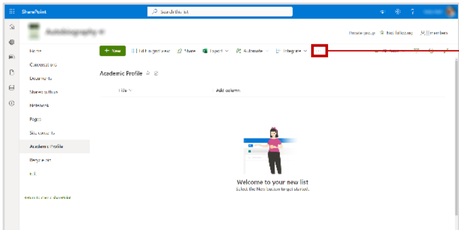


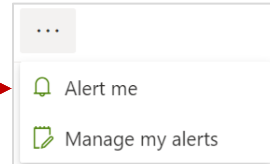
12. Alerts

When you click on the three dots icon (ellipses), it provides you with options to manage your alerts. Alerts in SharePoint are a way to receive notifications or updates when changes occur in lists. To set up or manage alerts, follow these steps:

1. Click on the three dots icon (ellipses) next to the item or list for which you want to create an alert.
2. In the dropdown menu, select "Alert me" to configure the alert settings. Specify when and how often you want to receive notifications for changes.

3. Additionally, you can access the "Manage my alerts" option directly from the three dots menu. This option allows you to review and manage all your alerts across your entire SharePoint site."



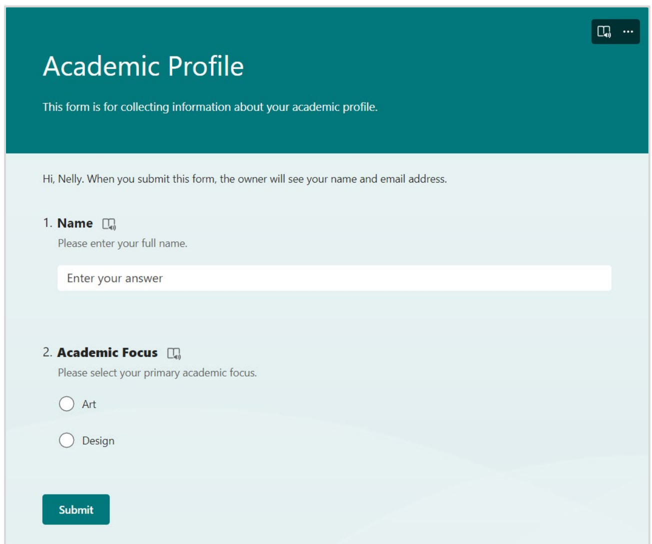


Power Automate

In this guide, we will walk through the process of leveraging Power Automate to transfer Microsoft Forms responses to SharePoint. This approach is designed to optimize your data management across various Microsoft services, ensuring efficiency and organization.

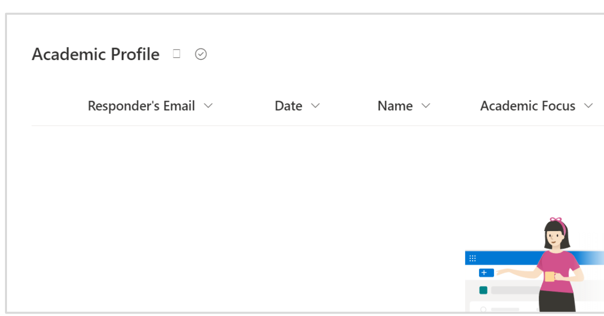
1. Create a Microsoft Form

Initiate the process by crafting a form in Microsoft Forms, as demonstrated in the accompanying screenshot. Incorporate a mix of "Text" and "Choice" questions. This form will serve as an example throughout the guide, capturing responses to be integrated into SharePoint.



2. Create a List in SharePoint

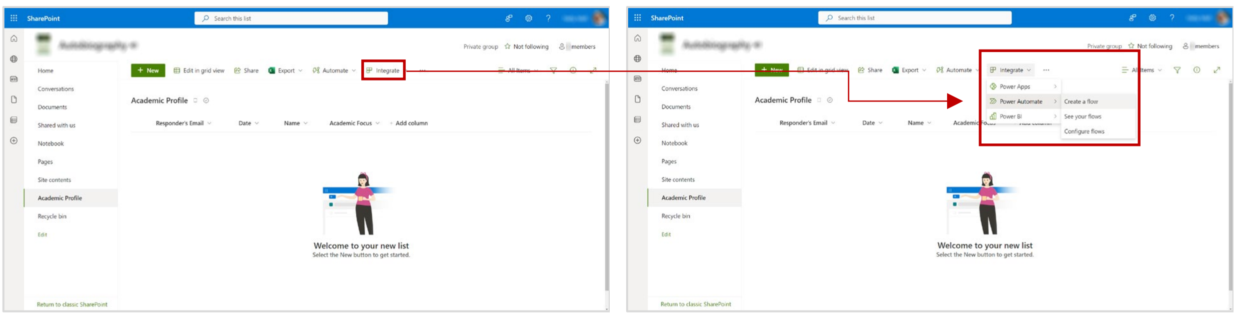
Establish a corresponding list in SharePoint, aligning column names with the questions in your form. The provided screenshot showcases the SharePoint list, encompassing columns such as "Responder's Email" and "Date," which can be automatically populated with responses from the form. Ensure alignment between columns like "Name" and "Academic Focus" and the form questions for reference in subsequent steps.



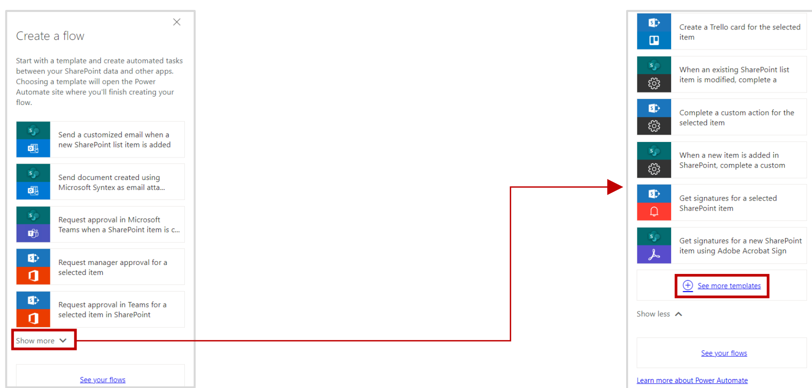
3. Integration with Power Automate

Initiate the process of transferring Microsoft Forms responses into SharePoint by following these steps:

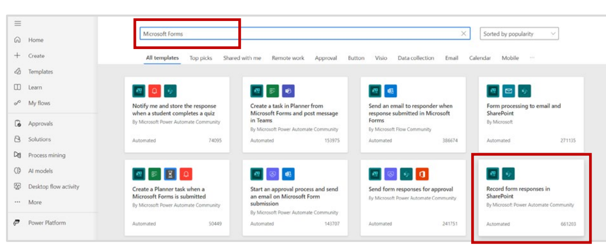
1. Start the process by clicking on "Integrate" on the SharePoint list you previously created to initiate the connection between Microsoft Forms and SharePoint.
2. From the available options, select Power Automate to configure the workflow for integration.
3. Initiate the creation of a flow by clicking on “Create a flow”.



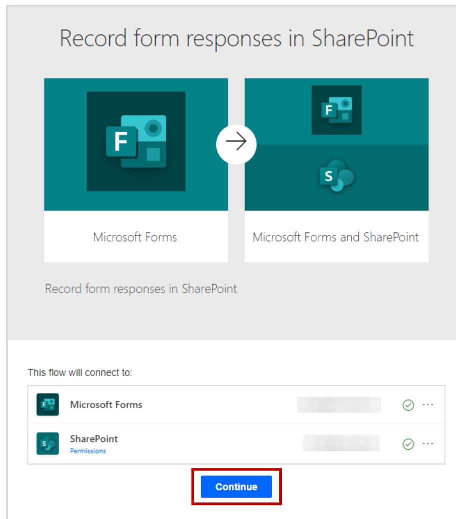
4. In the opened side pane, expand options by clicking on the “Show more” dropdown.
5. Scroll down and click on the hyperlink “See more templates.” This action redirects you to the Power Automate page in a new tab.



6. In the template search field, enter “Microsoft Forms” and locate the “Record form responses in SharePoint” template.

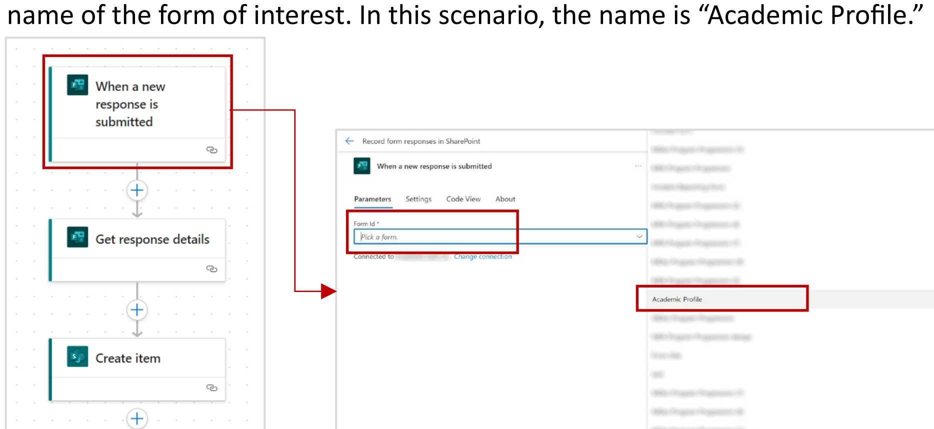


7. Proceed by clicking on “Continue.” This action takes you to the Power Automate “Flows” visual scripting working environment, where you will find the template specifically designed for recording Microsoft Forms responses in SharePoint.

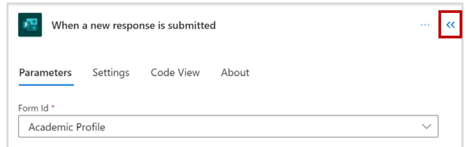


8. In Power Automate, personal forms are automatically linked to the creator's account, granting exclusive editing and access rights. They remain private and can only be accessed by the creator. On the other hand, group forms are associated with specific Office 365 groups, allowing all members to collaboratively view and edit them. To create flows, selecting a personal form is a simple task from a list, while for group forms, manual entry of the form ID is required.

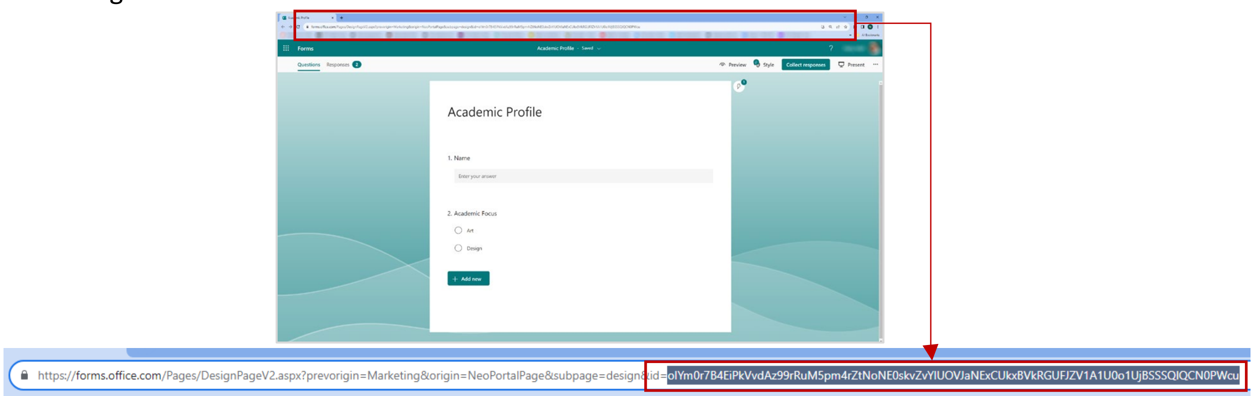
   Single Forms: Click on the first step of the flow, “When a new response is submitted.” This will open a new side pane that you must mention the Form Id of interest. Click on the “Form Id” and choose the name of the form of interest. In this scenario, the name is “Academic Profile.”



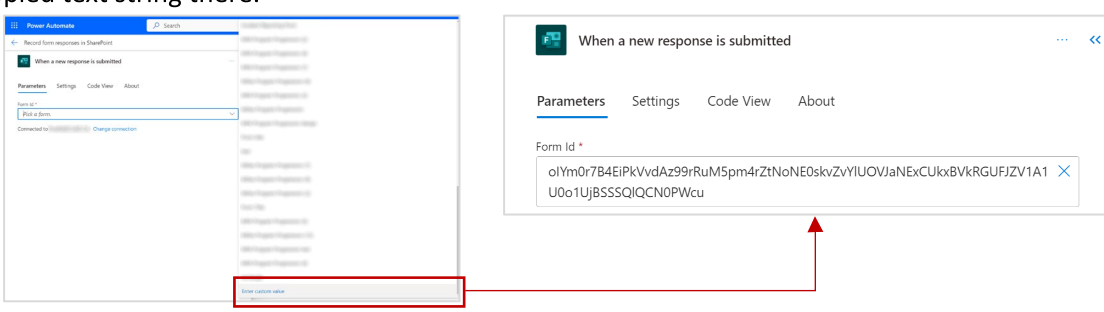
   Once chosen, click on “Collapse” to close the side pane. We will move on to the next steps of the flow.



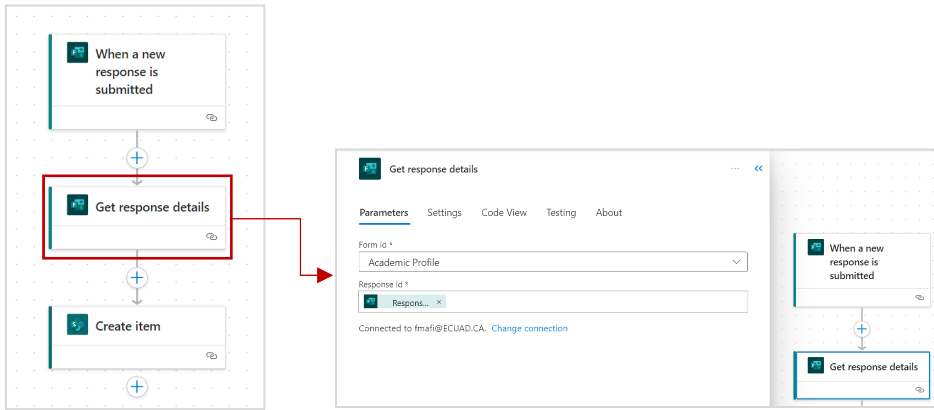
Group Forms: To find the form ID for a group form, begin by navigating to the group form in your web browser. Once on the form page, locate the URL from the browser's address bar. Within the URL, locate the text string that follows "id="—this is the unique identifier for the form. Copy this text string.



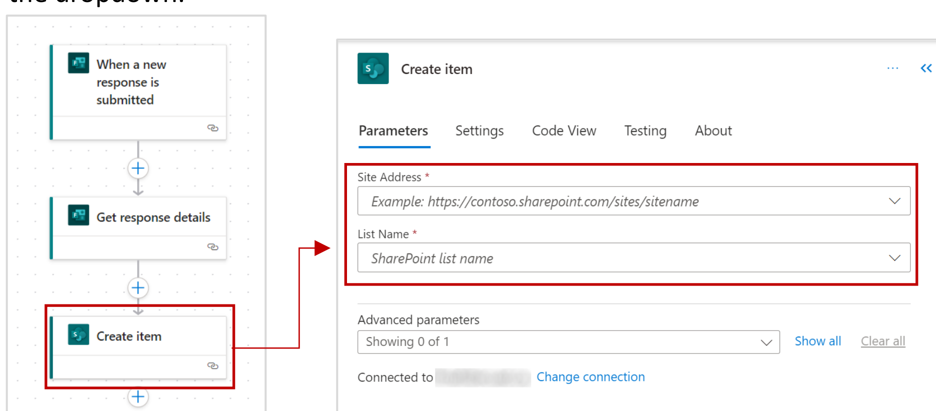
Now, click on the designated area labeled "Form ID" and click on "Enter custom value." Paste the copied text string there.



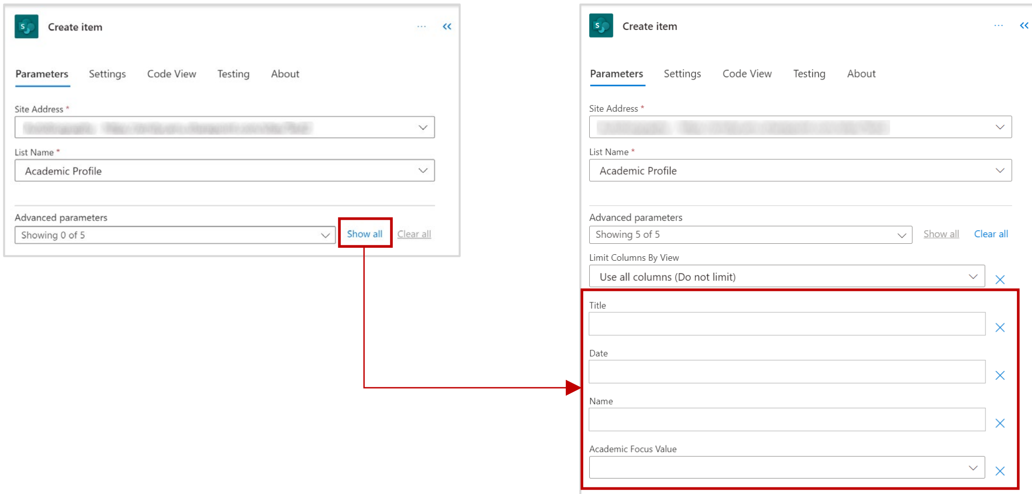
9. For the second step of the flow, “Get response details,” select or input the "Form ID" similar to the previous step. For single forms, choose a form from the list, and for group forms, manually enter the form ID from the form’s link. The “Response ID” should already be there by default as we are using this template.



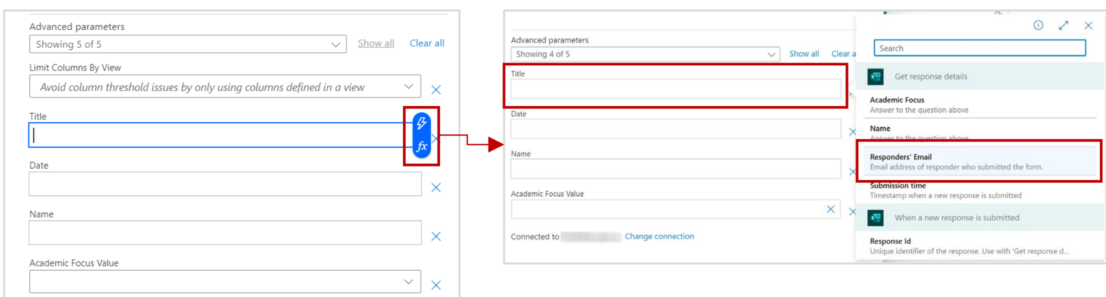
10. The third step of the flow is "Create item." Note that in the previous two steps of the flow, Power Automate was capturing data from Microsoft Forms, as indicated by the logos. This step will create items in the Microsoft SharePoint List. Therefore, there's no need to manually create items in SharePoint, as Power Automate will handle this task.
    Click on the third step, "Create item," and in the side pane, select the site address of interest in SharePoint. This should be the site on your SharePoint where you created the List. Input the List name from the dropdown.



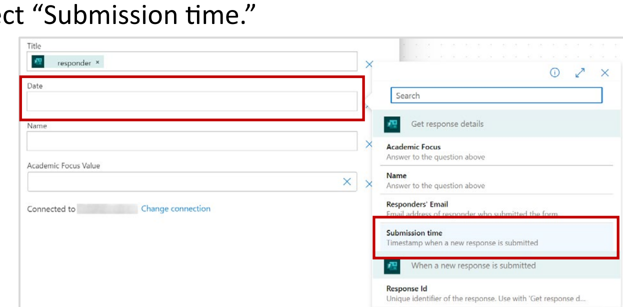
11. Upon choosing your List of interest, the Advanced parameters option will become available. Click on "Show all." You will observe that the columns created in the Lists previously are identified by Power Automate. This allows you to map the captured data from Microsoft Forms to the respective columns in your SharePoint List.



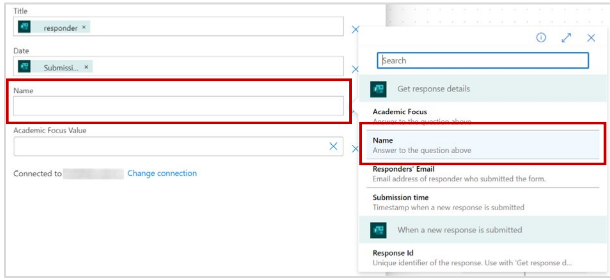
12. Click on the "Title" field, which is always the first column in your SharePoint Lists. Recall that we renamed this column to "Responder's email." You will see two features popping up: Enter the data (thunder icon) and Insert expression (fx function icon). These features are continuously available in the Power Automate visual scripting to assist you. Click on the thunder icon and select "Responder's email."



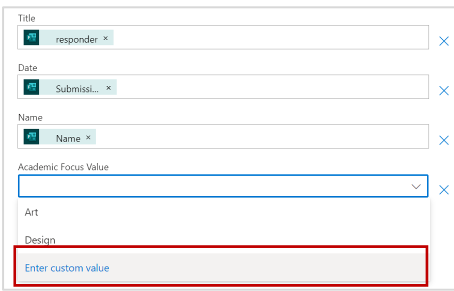
13. Click on "Date" and select "Submission time."

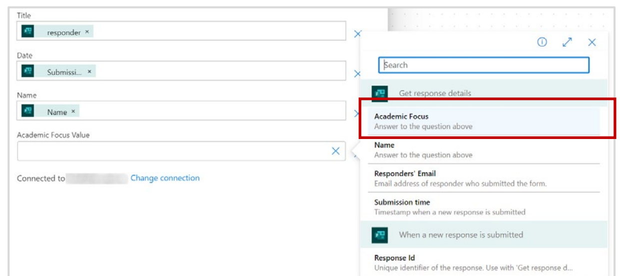


14. Click on "Name" and select "Name." This signifies that Power Automate will capture the Name inputted by users in the text question in the forms and place it in the Name column in SharePoint Lists.



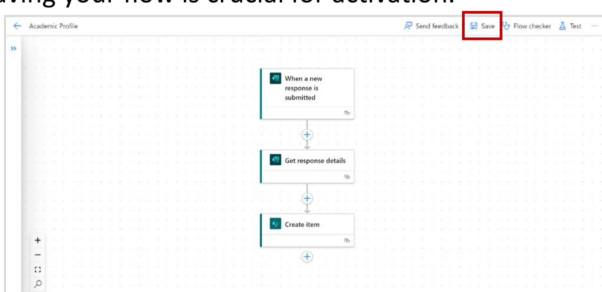
15. Click on "Academic Focus Value." You may notice that the icons do not appear as in previous selections. The reason is that Academic Focus was a choice in both the form and SharePoint list we created, and the dropdown is displaying those choices. To allow for automation from user responses, click on "Enter custom value." By doing this, the icons will reappear. Click on the thunder icon again and select "Academic Focus." This indicates that Power Automate will populate the associated column in Lists with the user response.



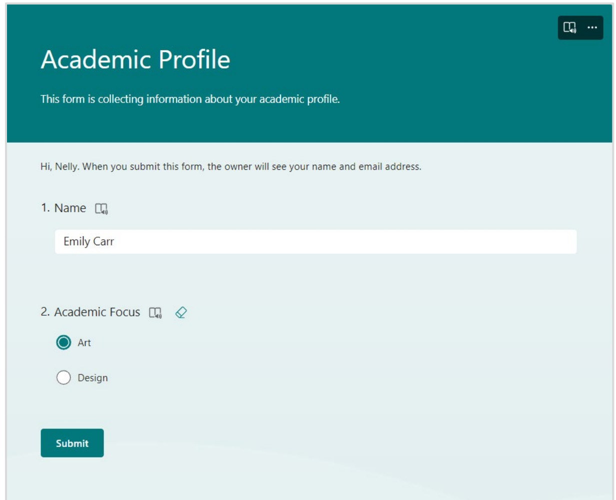


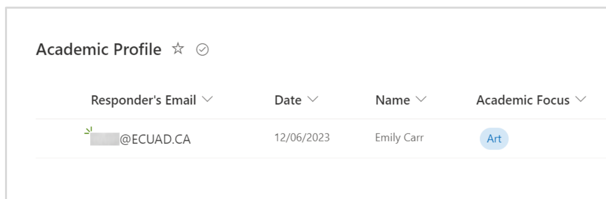
4. Save and Test the Flow

1. On the top left side of the editor, click on "Save." It is essential to save your progress before testing your automation. You can click on "Save" at any time to store your flows and resume working on them later. Remember, saving your flow is crucial for activation.

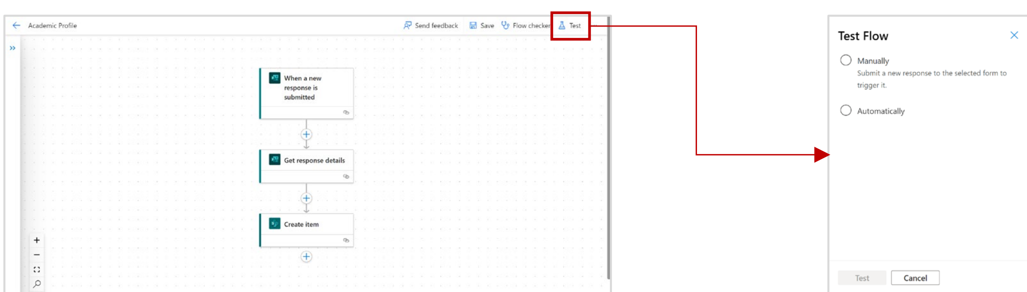


2. Before releasing the form to participants, always test your flow to ensure its functionality. To verify if the automation is functioning correctly (after saving), return to your Microsoft Forms. Click on "Preview," fill out the form, and submit it. After submission, navigate to the SharePoint Lists page to confirm that the response has been captured using the created flow.

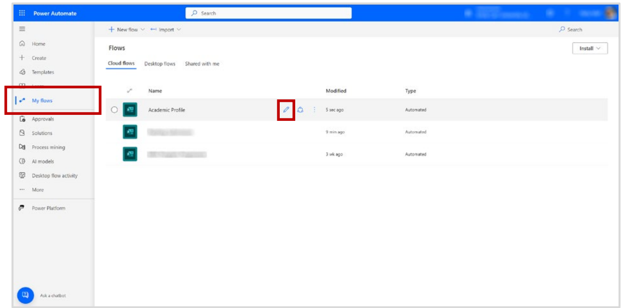




3. You can test the flow by clicking on the “Test” button located at the top of the screen. If you choose to test manually, submit a new response to the selected form to observe the results. Alternatively, if you opt for the "Automatically" option, you can assess the flow of the responses you submitted.



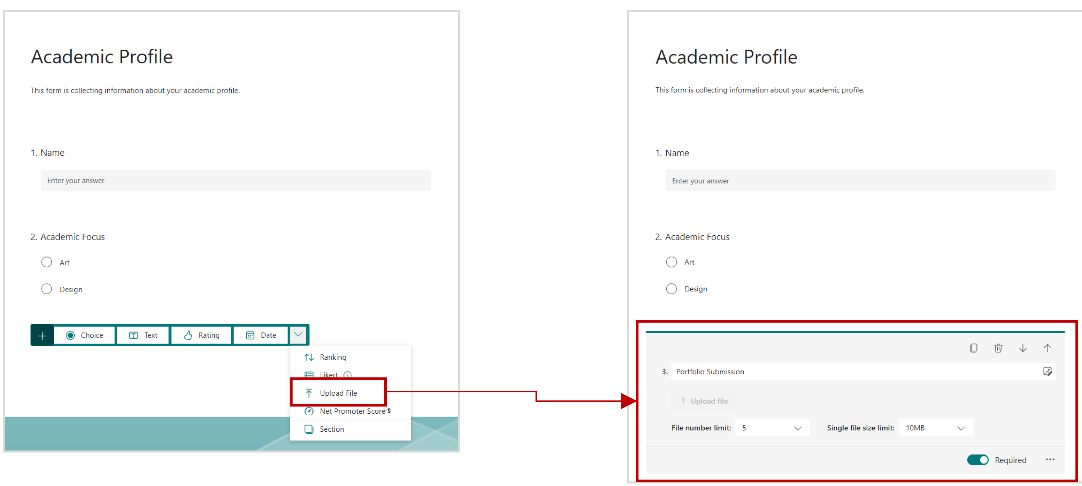
4. To review and edit your flows, return to Power Automate by navigating to https://powerautomate.microsoft.com/en-ca/ and sign in. On the left pane, click on “My flows” to find a list of all your flows. For editing a specific flow, hover over it and click on “Edit.” This allows you to make necessary adjustments and improvements to your automation.



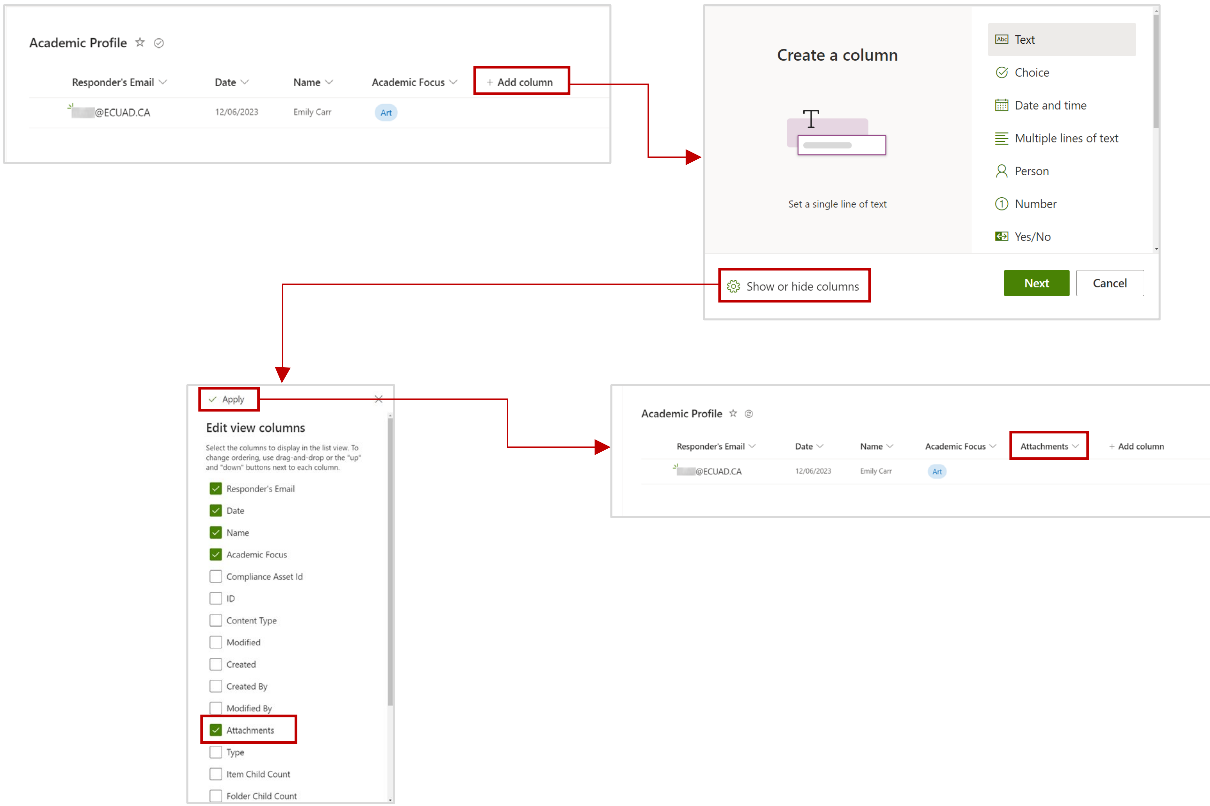
5. Form with Single Required File Upload

If your form includes a single mandatory (required) file upload question, follow these steps. **However, if the file upload question is optional or there are multiple file upload questions, additional instructions to the following steps are provided in section "6. Form with Single Optional File Upload" and "7. Form with Multiple File Upload" of this instruction document.**

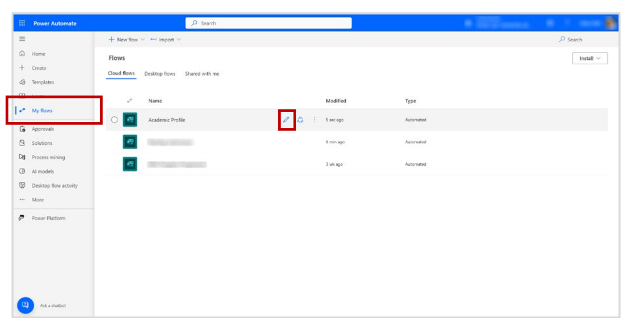
1. Begin by adding an "Upload File" question to your Microsoft Forms. In this guide, we've introduced a required question named "Portfolio Submission," forcing respondents to upload a file. If your form has a single mandatory file upload question, follow the outlined steps. However, if you have multiple file upload questions or if the file upload question is optional, refer to additional instructions in "6. Form with Single Optional File Upload" and "7. Form with Multiple File Upload" after completing the "5. Form with Single Required File Upload" section.



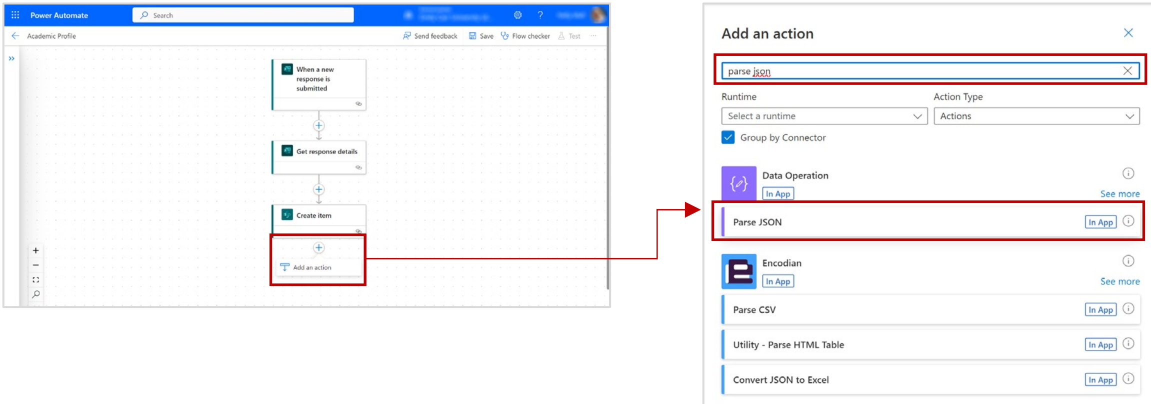
2. To synchronize the form question with the SharePoint list, activate the attachment column instead of establishing a new one. Enable attachments for your list, facilitating the direct addition of attachments to list items via the form. Follow these steps: Open the SharePoint list view, click on + Add column, select Show/hide columns, locate and check the Attachments checkbox. Finally, click on Apply, and observe the addition of the "Attachments" column to the list.



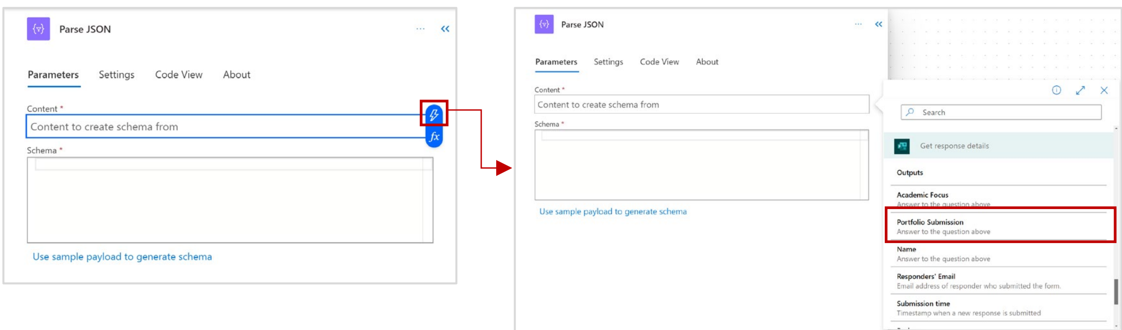
3. Return to Power Automate for flow management by visiting https://powerautomate.microsoft.com/en-ca/ and signing in. On the left pane, select "My flows," where you can find and edit your flows by hovering over the desired flow and clicking on "Edit."



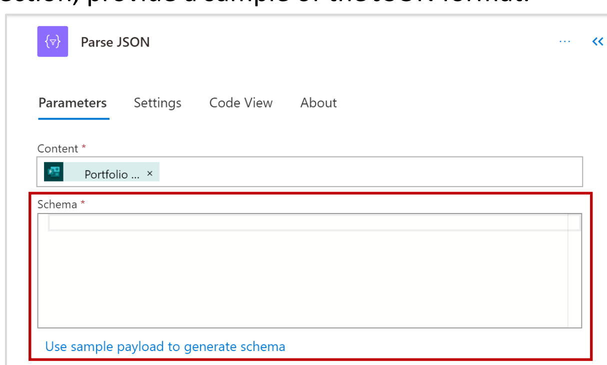
4. Proceed to extract the attachment from the "Upload File" question within the Microsoft Forms you've created. To save these files to SharePoint, utilize the "Parse JSON" feature in Power Automate, which allows you to extract the necessary information. JSON, a data organization method, facilitates computer understanding.
Click the plus button after the "Create item" action to add a new action, then select "Add an action." In the pop-up, search for "Parse JSON" under "Data Operation."



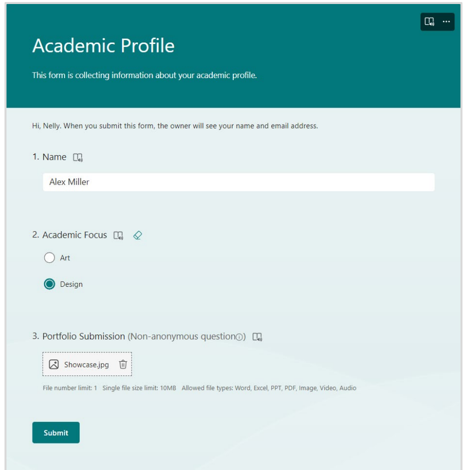
5. For the "Content" property, click the box to indicate the attachment fields; in this tutorial, it's the "Upload File" question, specifically "Portfolio Submission."



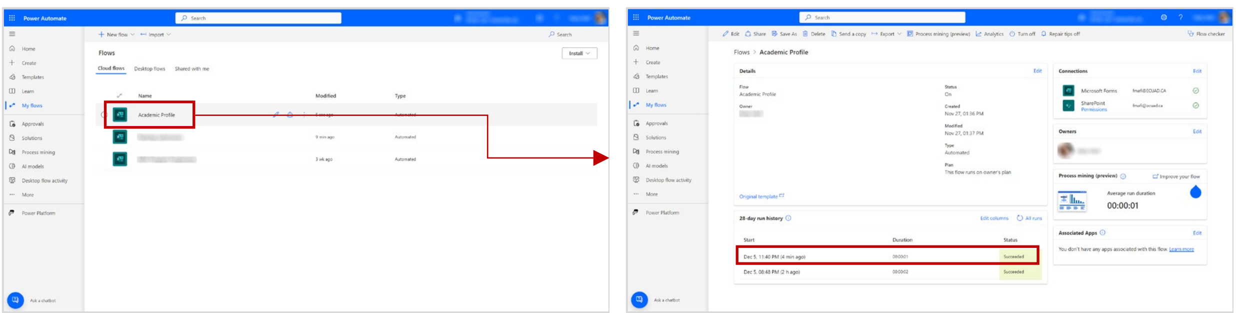
6. Next, in the "Schema" section, provide a sample of the JSON format.



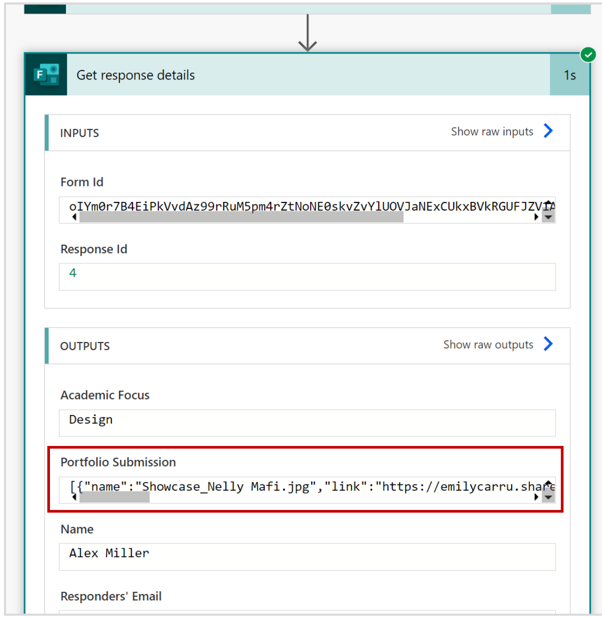
To determine the required format for extracting file names, submit a test item in the form by filling the form questions and upload a file.



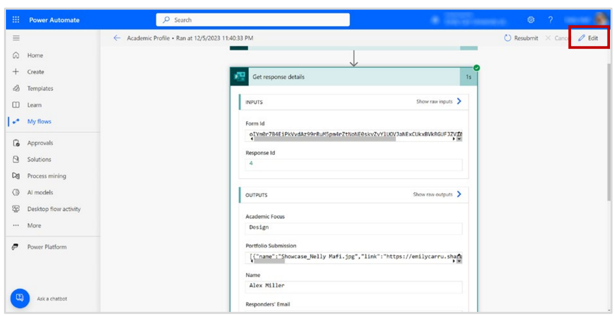
Return to Power Automate, inspect the run history, and click on the recent run.



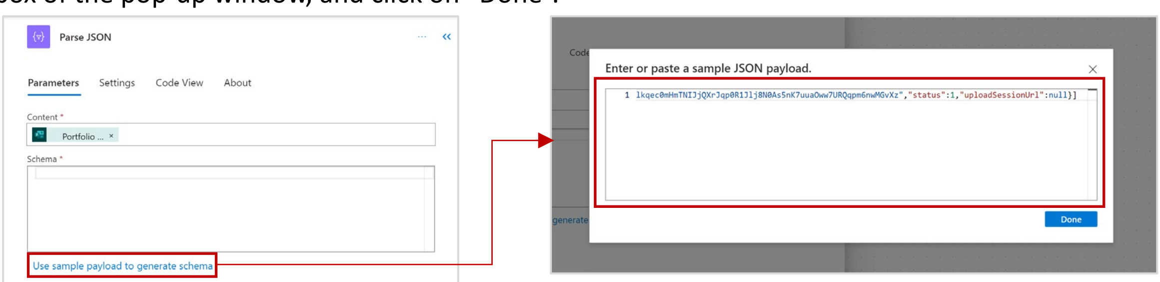
Expand the "Get response details" action to understand the format necessary for extracting the image's name, focusing on the "Portfolio Submission" section created through the "Upload File" question in the forms. The field property appears as a JSON block, containing properties like "name" with a corresponding value. Additionally, there are properties such as "link" indicating the file's storage location, along with ID, type, size, and reference ID.
It's crucial to note that the field is more than just the file content or name, necessitating a process called parsing JSON to extract only the required information, in this case, the file name. This underscores the importance of testing to reach this stage. Copy the content from the "Portfolio Submission" attachment field.



Click on "Edit" to return to the edit mode.



Now you can give a sample of what the JSON will look like. That is why we tested it. And we copied that. So, click on “Use sample payload to generate schema”, and paste what you copied in the text box of the pop-up window, and click on “Done”.



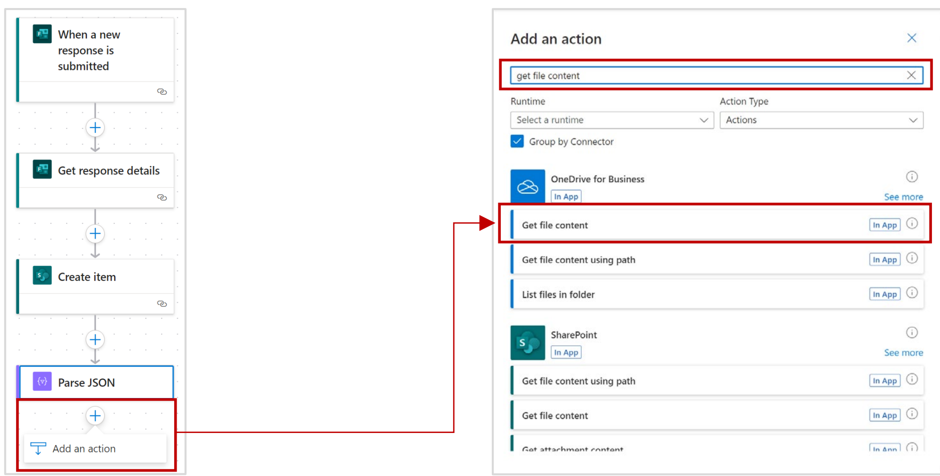
7. To access the contents of uploaded files in Microsoft Forms, you must identify their storage location. For single Microsoft Forms, attachments are stored in the OneDrive of the form's creator. On the other hand, if the form is configured as a group form or is relocated to a group, the uploaded files find their storage in the Documents library of the SharePoint site linked with the Office 365 group to which the form has been moved.

Single form:

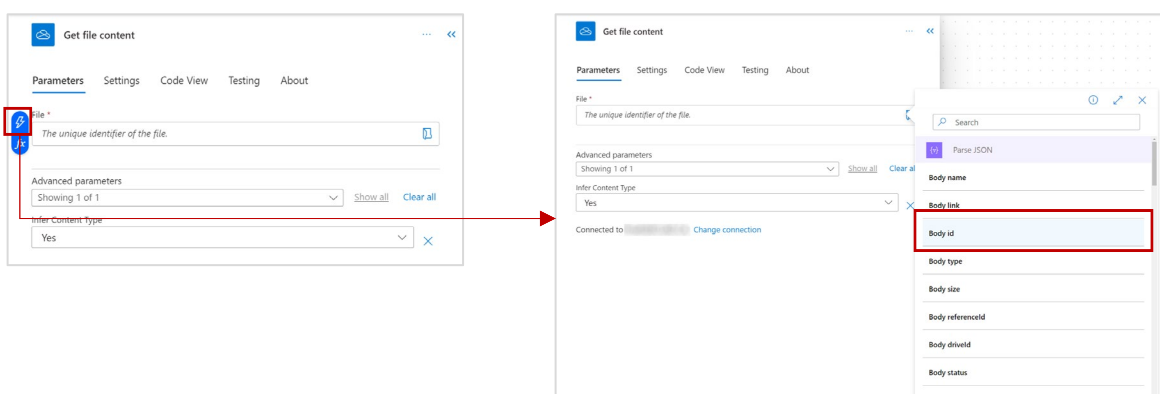
For single forms, locating the storage location of files requires understanding that an "Upload File" question in Microsoft Forms saves files in the OneDrive for Business account of the form's creator. To access uploaded files in Microsoft Forms through OneDrive, follow these steps:

- Sign in to your OneDrive for Business account.
- Select "Files" and navigate to the "Apps" folder.
- Locate and select the "Microsoft Forms" folder.
- Choose the file folder corresponding to your form's name.
- Select the folder containing the uploaded files for the specific question.
- Within that folder, you should be able to find the attachments you uploaded.

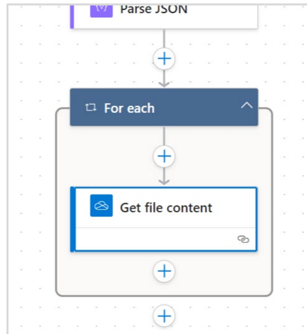
To transfer files from a single form stored in OneDrive using Power Automate, add a new action after the "Parse JSON" action. Search for "Get file content" from "OneDrive for Business."



Click on the "File" field, and click on "Enter data" (thunder icon). Under "Parse JSON" category, you can see the properties obtained from the JSON block. Click on "Body id" under "Parse JSON" to retrieve the ID of the files from the previous action.



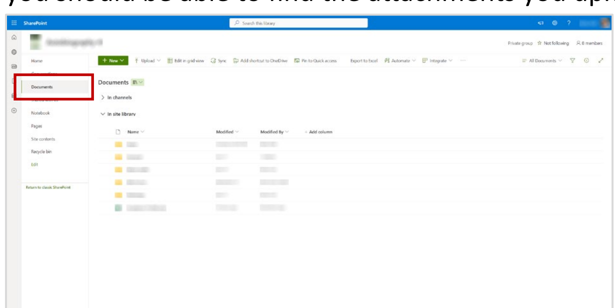
If you're using the "Get file content" action with a SharePoint trigger, the action might be nested inside a "For each" loop since the trigger is designed to return multiple files. In this case, the "For each" loop is used to iterate through each file and retrieve its content.



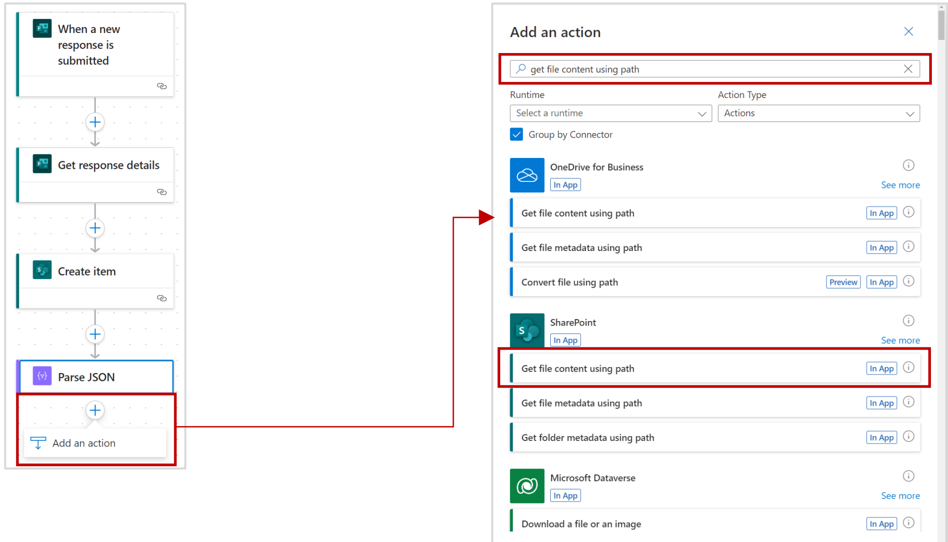
Group form:

For group forms, understanding the storage location of files involves recognizing that when you create an "Upload File" question in Microsoft Forms, the attachments are stored in a document library on the Office 365 group SharePoint site. Follow these steps to locate the attachments:

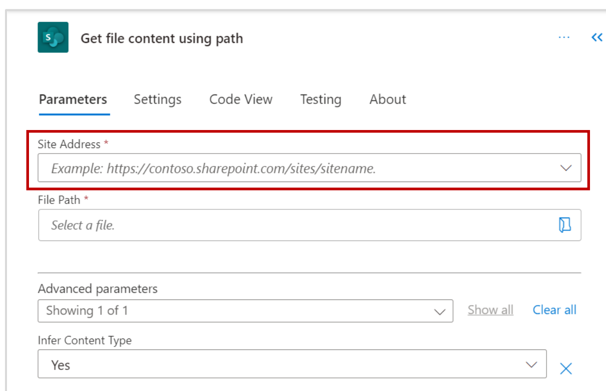
- Go to the SharePoint site associated with your Office 365 group.
- Click on the Document Library where the attachments are saved.
- Navigate to the "Apps" section.
- Look for the folder corresponding to the Microsoft Group Form you utilized.
- Within that folder, you should find the attachments you uploaded.
- Within that folder, you should be able to find the attachments you uploaded.



To transfer files from a group form stored in a SharePoint site using Power Automate, add a new action after the "Parse JSON" action. Search for "Get file content using path" from "SharePoint."

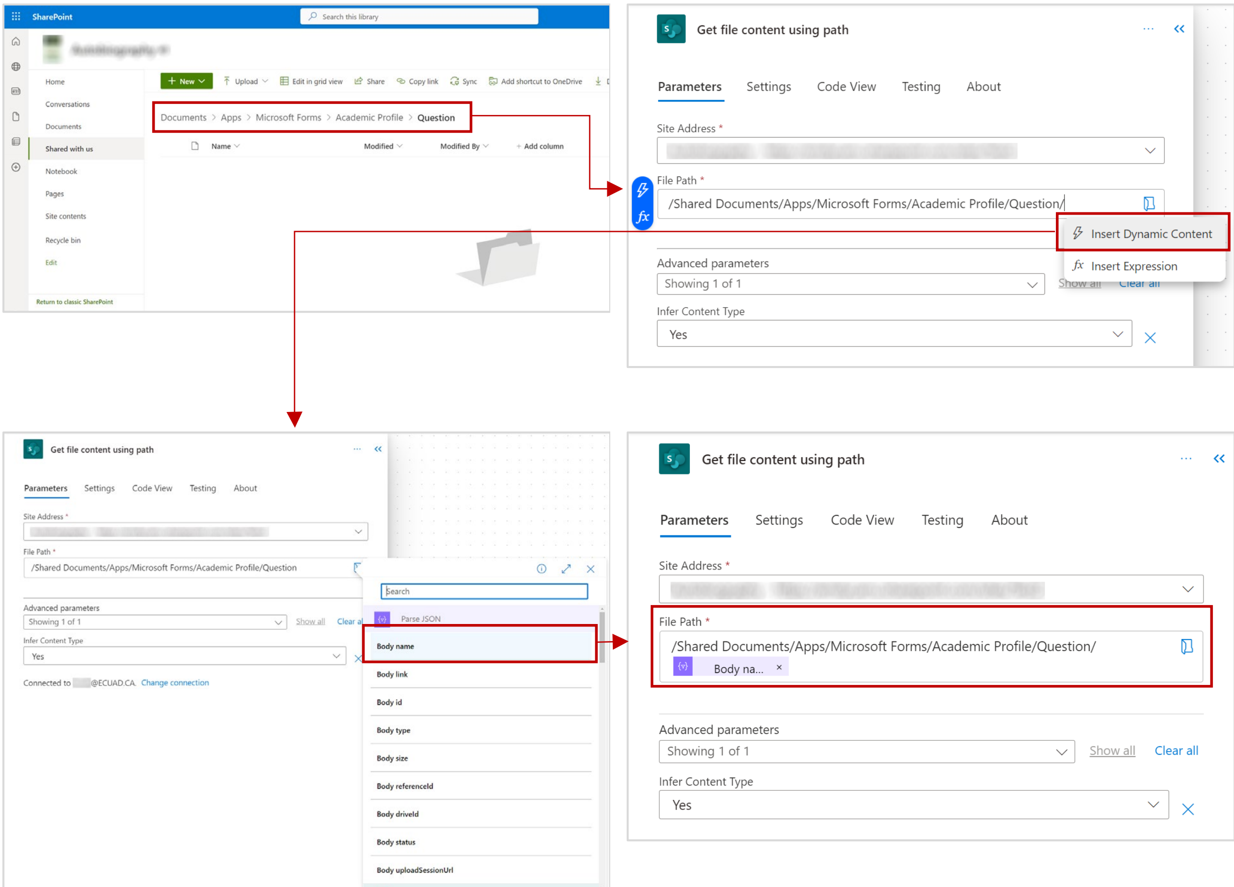


Choose the site address relevant to your SharePoint, where you created the list previously. Input the List name from the dropdown.

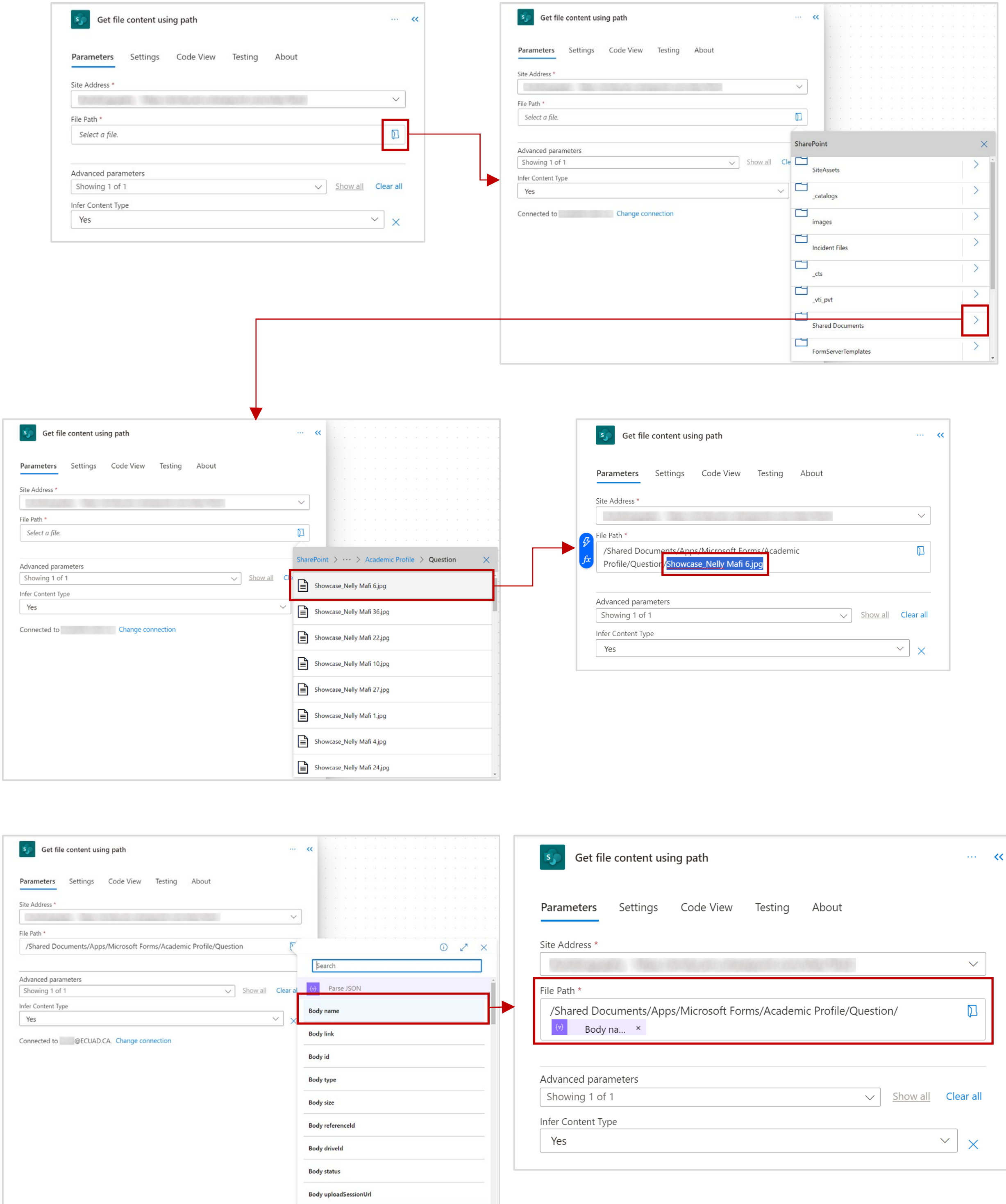


There are two approaches to inputting the file path for retrieving file content. Firstly, you can manually specify the folder path by reviewing the Document Library of the SharePoint site and entering it in the "File Path" field. Alternatively, you can utilize the “Open folder” button within the “File Path” field, which provides a list of existing documents in the selected SharePoint site.

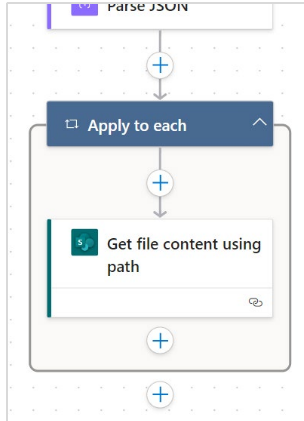
To manually input the file path, start with a forward slash. In our scenario, initiate with "Shared Documents," followed by another forward slash for the "Apps" folder, another for the "Microsoft Forms" folder, additional slashes for the form name, and the folder containing attachments. The last step is to include a forward slash for the file name. Utilize an expression for this by adding a forward slash and clicking "Insert Dynamic Content". Under the Parse JSON header, click on the "name" or "Body name" property, where the file name is stored.
Please be aware that after adding the property, the final forward slash before adding the expression may disappear. Ensure to re-add it if it is no longer present.



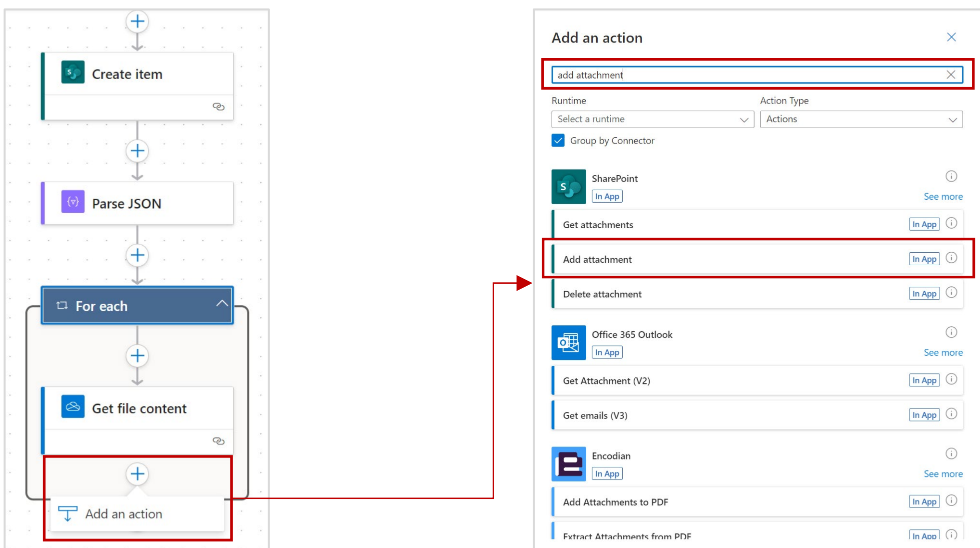
Alternatively, you can utilize the “Open folder” button to reveal the contents of the document library in the chosen SharePoint site. Navigate through folders by clicking arrow buttons, beginning with "Shared Documents," then "Apps," "Microsoft Forms," the form name, and the folder with attachments. For file path selection, locate a previously uploaded file, click on it, and replace the file name with an expression. For adding the expression for getting the file name, after the last forward slash, click "Insert Dynamic Content" under Parse JSON, choosing the "name" or "Body name" property where the file name is stored.
Please be aware that after adding the property, the final forward slash before adding the expression may disappear. Ensure to re-add it if it is no longer present.



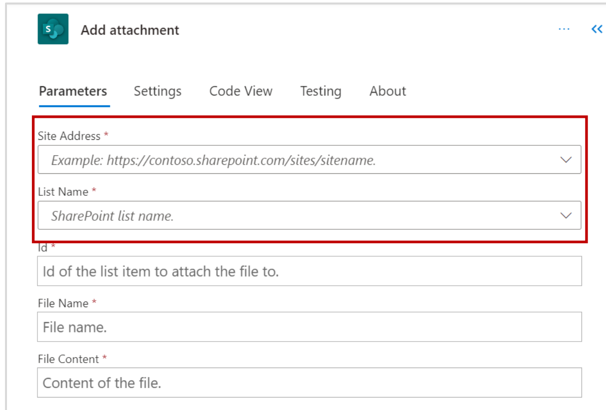
If you're using the "Get file content" action with a SharePoint trigger, the action might be nested inside a "For each" loop because the trigger is designed to return multiple files. In this case, the "For each" loop is used to iterate through each file and retrieve its content.



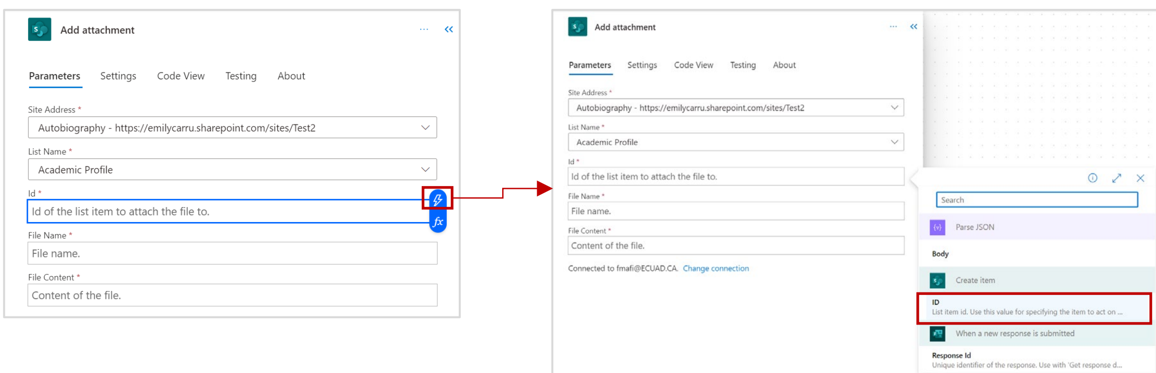
8. Whether you have a single or group form, the next steps are identical. Now, you need to add that attachment. Add a new action by clicking on the plus button after the "Get file content" action and then click on "Add an action." Search for "Add attachment" under "SharePoint."



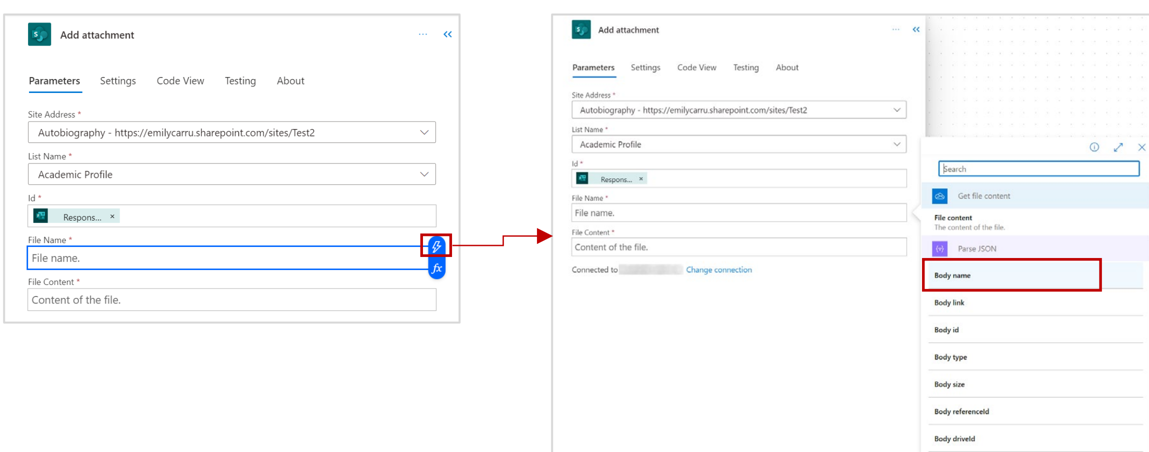
9. Choose the site address and list name again.



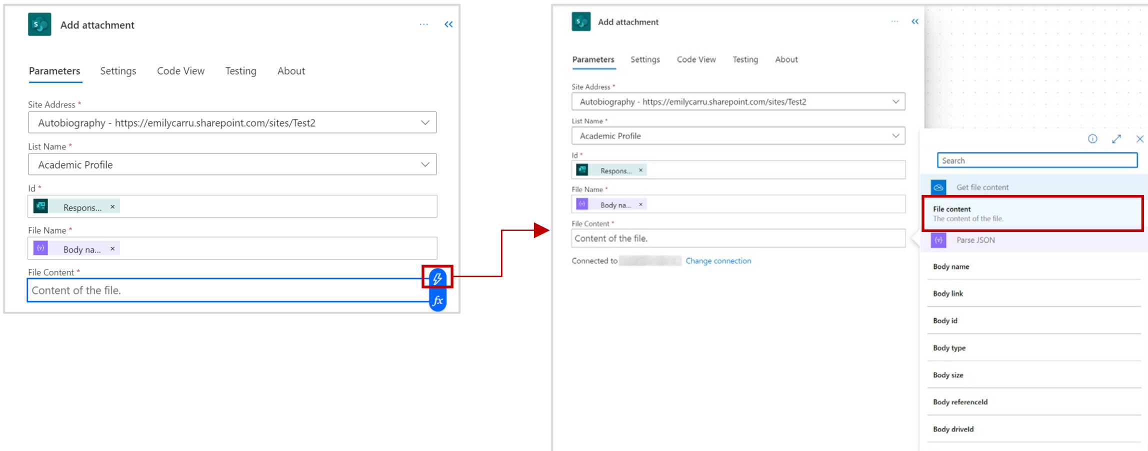
10. Click on the "Id" field, and you will see two features popping up: Enter the data (thunder icon) and Insert expression (fx function icon). Click on the thunder icon and choose "ID" under the "Create item."



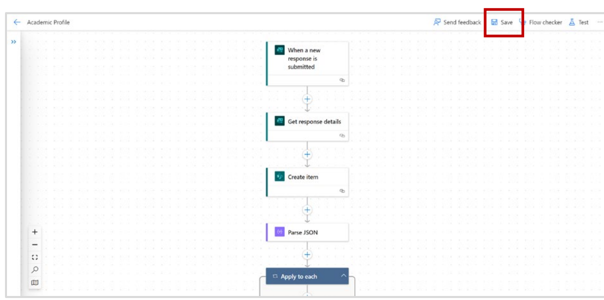
11. Click on "File Name," and again, you will see two features popping up: Enter the data (thunder icon) and Insert expression (fx function icon). Click on the thunder icon and choose "Body name."



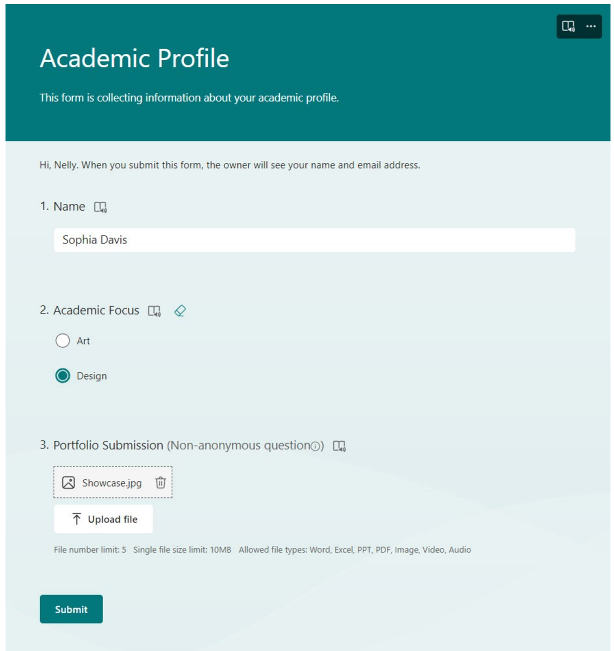
12. For the "File Content," click on the field and you will see two features popping up: Enter the data (thunder icon) and Insert expression (fx function icon). Click on the thunder icon and choose "File content" under "Get file content" to retrieve the content of the file from the previous step.

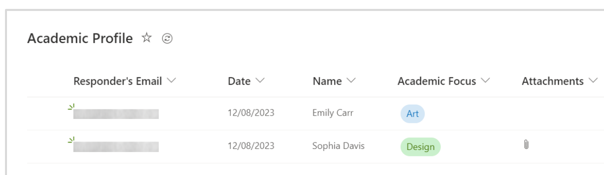


13. On the top left side of the editor, click on "Save." It's essential to save your progress before testing the automation. You can click on "Save" at any time to save your flows and continue working on them later. Saving the flow is a crucial step for activation. After saving, ensure to test your flow before releasing the form to participants.

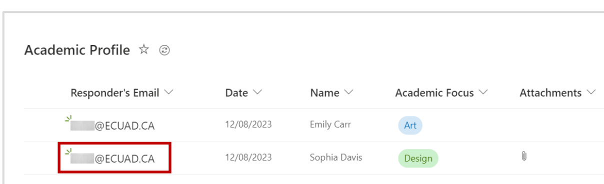


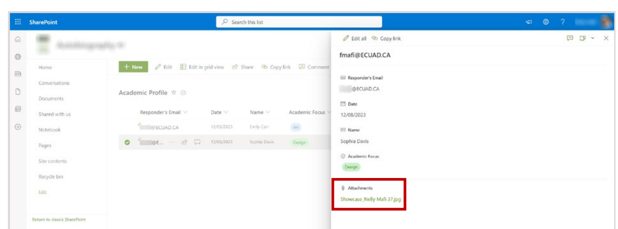
14. To test if the automation is working (after saving). Go back to your Microsoft Forms and click on "Preview" and fill the form yourself and submit. After submission, go the SharePoint Lists page and you will see that the response was captured with the flow that you created.



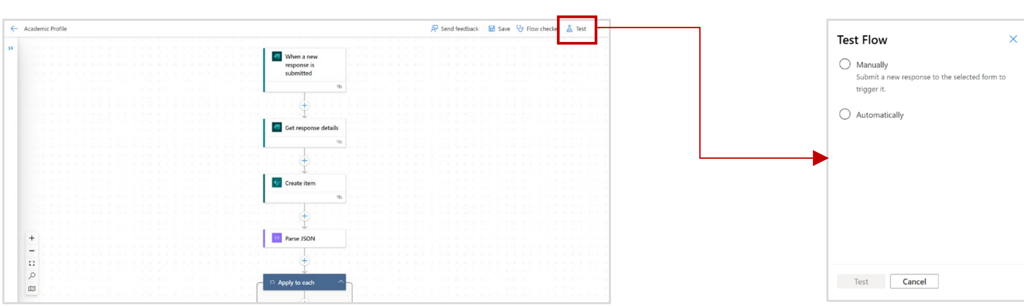


For viewing the attached file, click on the recent response and open the attachment.

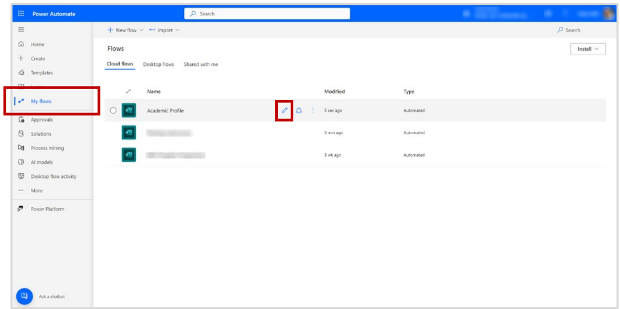




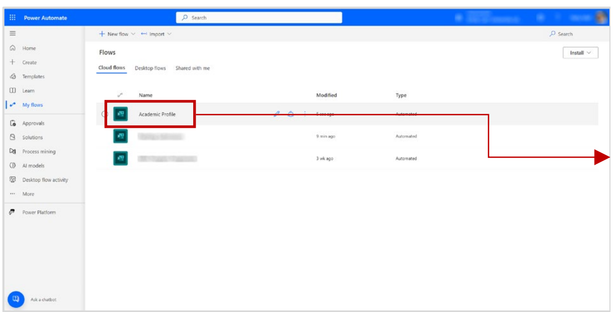
15. Test your flow by clicking on the "Test" button at the top of the screen. If you choose the manual option, you'll need to submit a new response to the selected form to view the results. Opting for "Automatic" allows you to test the flow with the responses you've submitted.

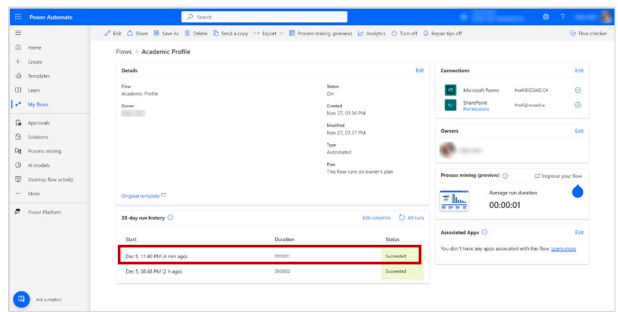


16. To review and manage your flows, return to Power Automate by navigating to https://powerautomate.microsoft.com/en-ca/ and signing in. In the left pane, click on "My flows" to access all your flows. For editing a specific flow, hover over it and click on "Edit."



17. In Power Automate, click on the flow, and inspect the run history. Click on the recent run to review the flow's execution, or, if there are errors, this is where you can identify and address any issues.



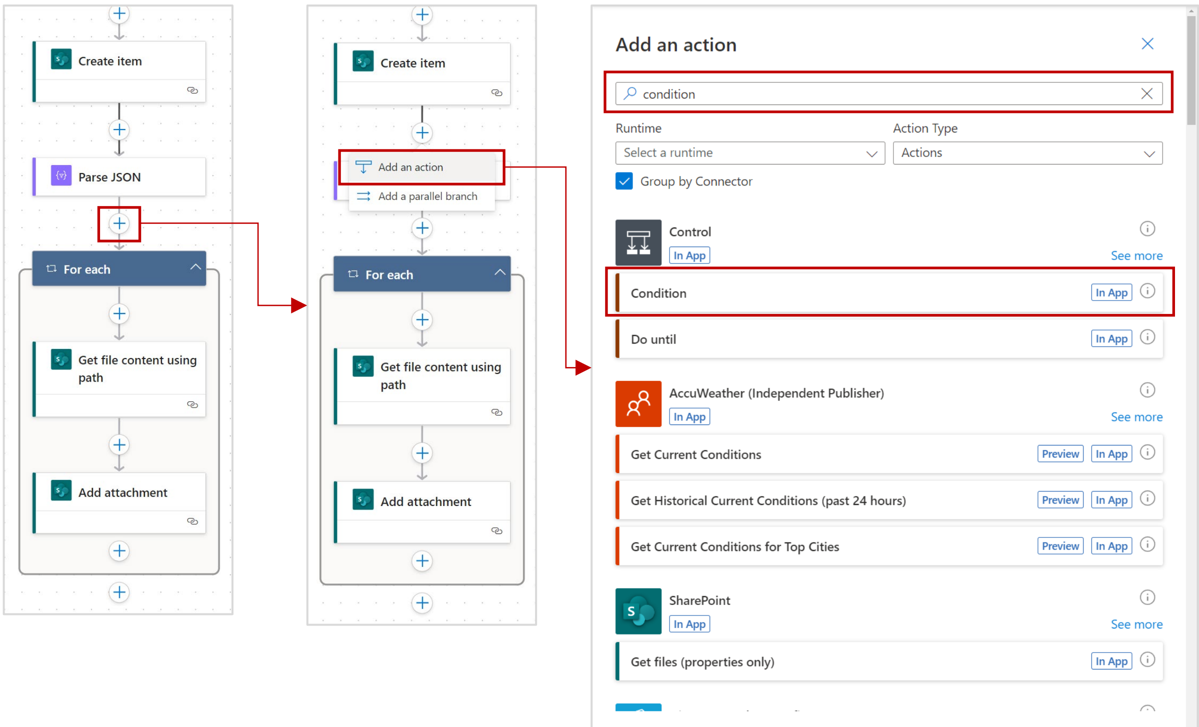


6. Form with Single Optional File Upload

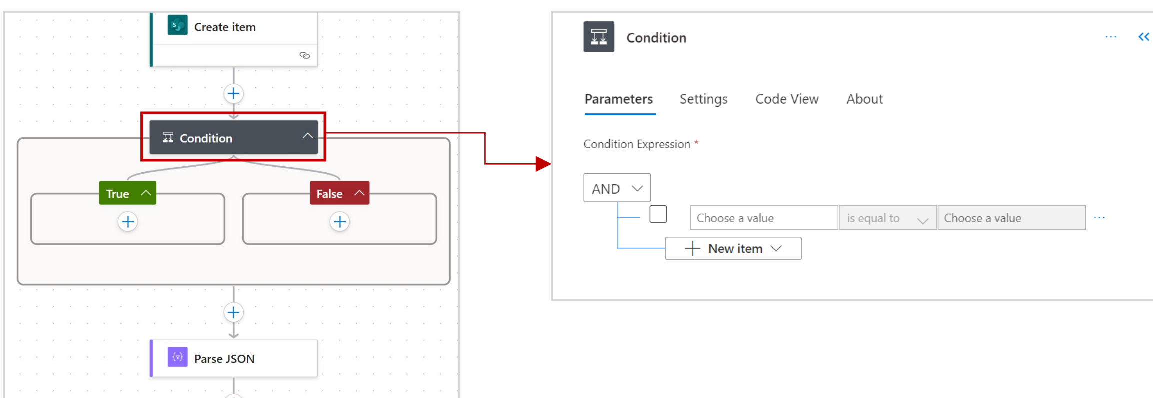
When completing a form with a single file upload question and submitting it without an attached file (even though it's not mandatory), the SharePoint item creation process functions correctly. However, Power Automate marks it as a failure due to the absence of a file for processing in the subsequent file-handling steps. To resolve this issue, it is recommended to insert a condition before the file action, checking for the presence of any files. If the condition is true, proceed with the "apply to each" operation. This conditional step is crucial for execution, especially considering your established workflow for managing attachments from OneDrive or a SharePoint list.

In Power Automate, a condition acts as a control mechanism, allowing you to selectively execute actions based on logical expressions. This proves valuable for executing actions contingent upon meeting predefined conditions, such as verifying if a file has been uploaded before advancing to the next step. Therefore, in our specific scenario, incorporating a condition before the file action to validate file presence is essential. If the condition holds true, proceed with the "apply to each" operation.

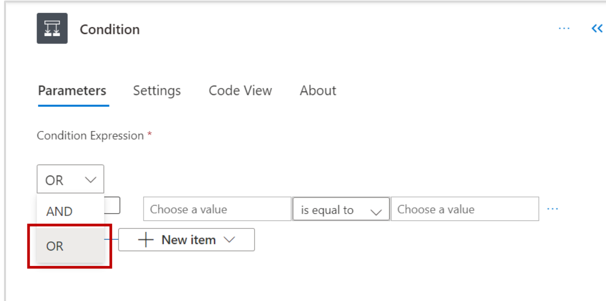
1. Start by clicking the plus icon following the "Create item" action, then select "Add an action." In the search bar, type "condition," and from the options, select "Condition" under the "Control" category.



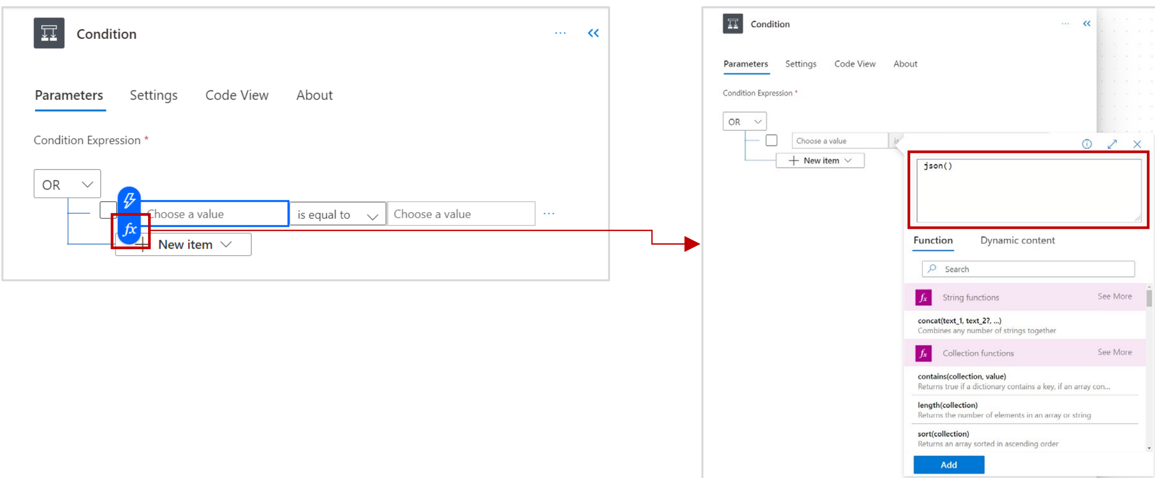
2. Select "Condition" to open it.



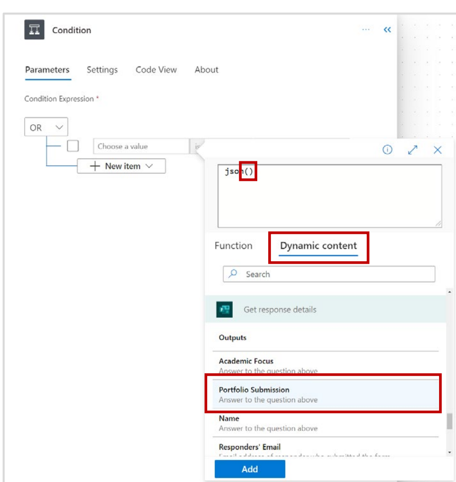
3. In our specific situation, it's advisable to employ the "OR" operator in your condition to align with our requirements. Choosing "AND" would result in the condition being true only if both specified conditions are met. On the other hand, opting for "OR" ensures that the condition is true if at least one of the conditions is satisfied. In our case, we aim to check whether a file is uploaded so that we can proceed with attaching files in SharePoint. The condition should be true in this scenario. However, we want to avoid attaching anything if no file is uploaded, emphasizing the importance of utilizing the "OR" operator for flexibility in meeting our conditions.

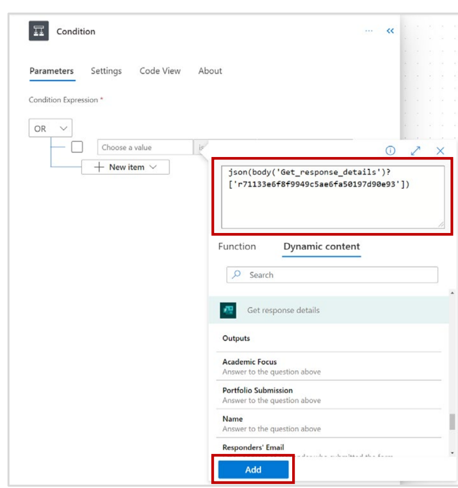


4. Within the condition, you want to select the data you intend to manipulate, which in our case is the upload file question. Click on the "Choose a value" field, and then, using the "Insert expression" (fx function icon), input "json()" in the text box.

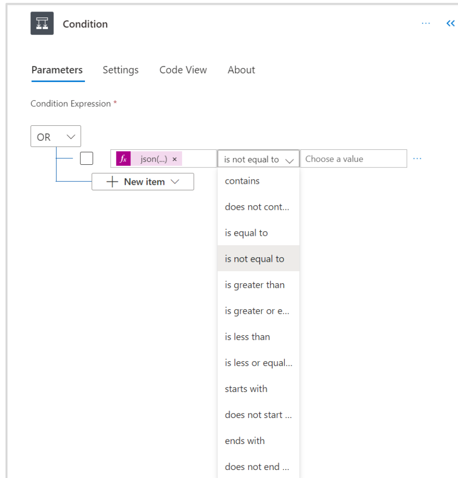


Inside the parentheses, you'll want to include the file upload question. Click within the parentheses, navigate to "Dynamic content," and from the available options, select the file upload question—named "Portfolio Submission" in this tutorial. Once the link is inserted, click the "Add" button to incorporate the expression.

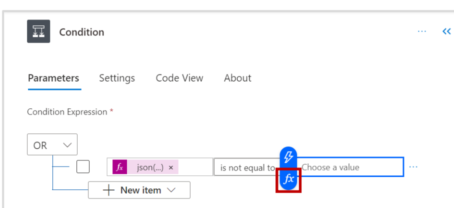


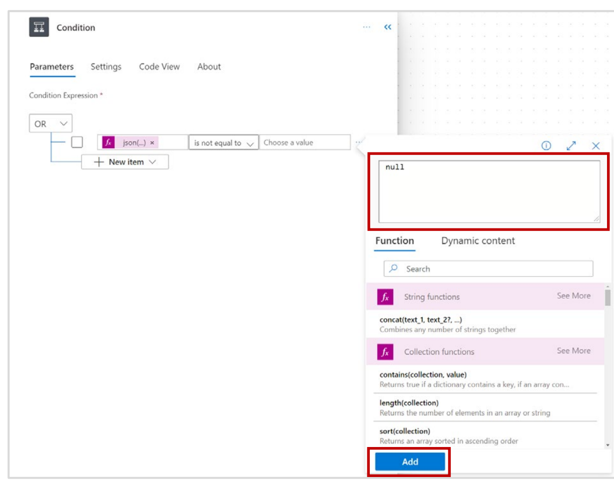


5. Is not equal to
   In Power Automate, `is equal to` and `is not equal to` are comparison operators used in conditions. The is equal to operator checks if two values are equal, while the not equal to operator checks if two values are not equal. We are going to use `is not equal to`.

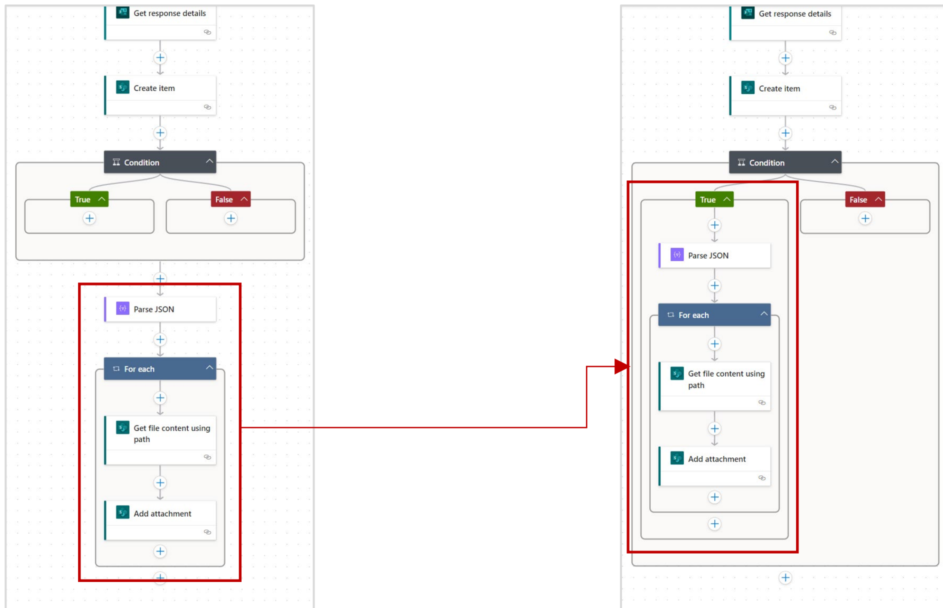


6. Null
   In Power Automate, `null` is a value that represents the absence of a value. It is used to indicate that a variable or field does not contain any data. In this case, if the json() of our file upload output is not equal to null, it means that the file has been uploaded and we need to process the uploaded file in the following steps.





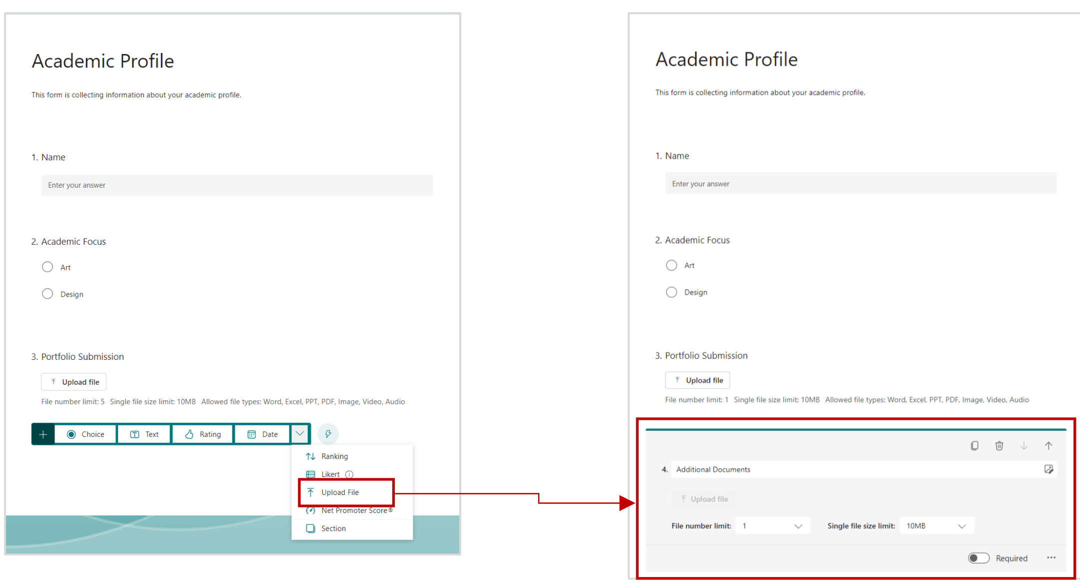
7. If the condition is true (file upload is not equal to null is true), proceed with the subsequent steps of obtaining and incorporating files. If no file is uploaded (false), the process will remain inactive. And power Automate will pass the condition section. To implement this, drag the Parse JSON action and its subsequent actions, such as "Get file content using path" for a group form or "Get file content" for a single form, along with the "Add attachment" section, and drop them into the "True" condition.



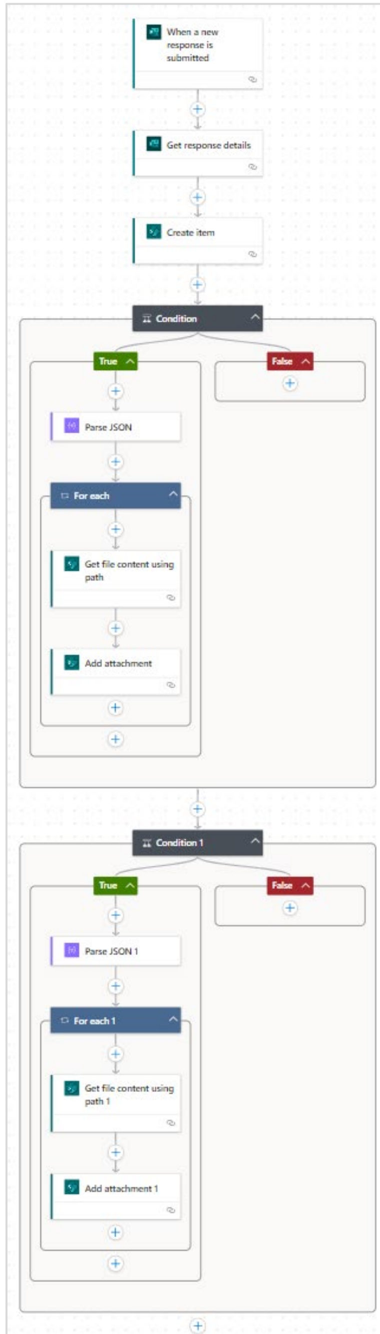
7. Form with Multiple File Upload

If your form includes multiple file upload questions, you'll need to follow additional steps. Given that you already have a workflow in place for adding attachments from OneDrive or a SharePoint list, as well as attaching files in SharePoint, and have introduced a conditional step to handle scenarios where file uploads are not mandatory, let's proceed to incorporate another question into the flow.

1. Start by integrating an additional 'Upload File' question into the Microsoft Forms you've created. In this guide, we've introduced a question labeled 'Additional Documents'.



2. Now, let's duplicate the steps we followed for the "Portfolio Submission" question for the "Additional Documents" question. Note that in Condition 1, you need to do the json() is not equal to null for the new file upload question. Subsequently, the parsing will happen on the new question from forms and the following steps will be focusing on the outputs of this new question.

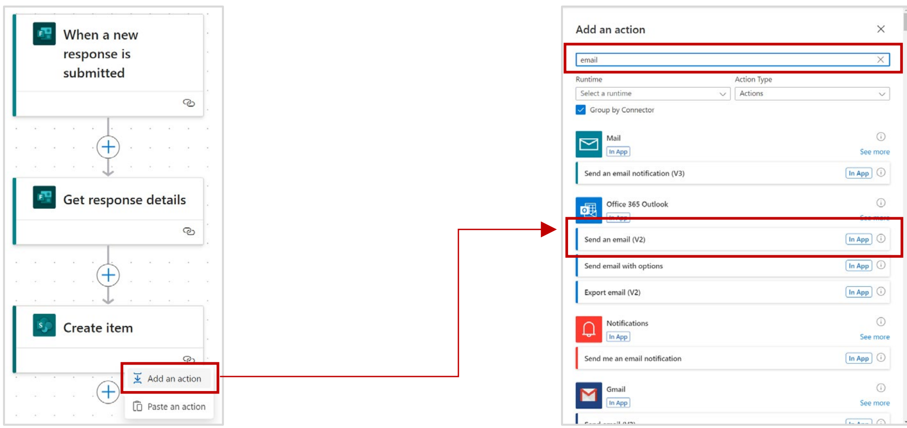


Outlook Email Notification

In this guide, we'll walk you through the process of configuring Outlook email notifications for Microsoft Forms submissions. Ensure timely updates on form submissions with essential details like form name, responder's name, and submission date. This system also provides quick access to response management in Microsoft Forms and SharePoint, optimizing your workflow for efficient form handling.

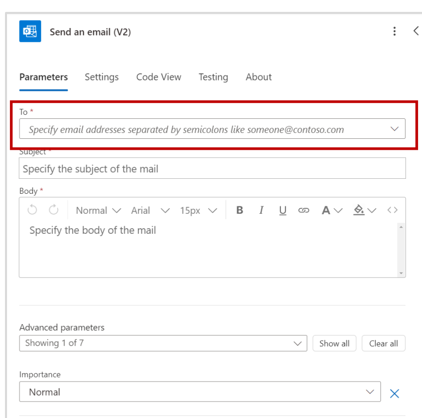
1. Adding Email Notification Operation

Start by adding a new step to your flow. Click on "+ New step" to expand your workflow. To incorporate an email notification, use the search bar and type "send an email." Under the "Actions" section, select "Send an email (V2)" specifically designed for Office 365 Outlook.



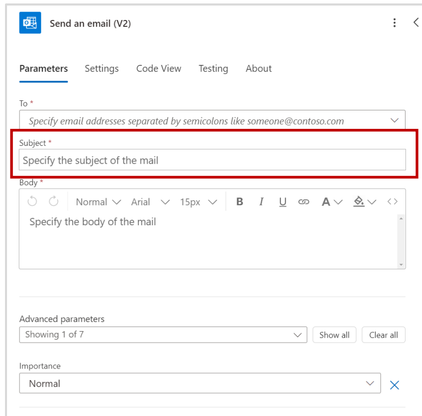
2. Email Recipient Setup

Start by filling the "To" field, by specifying the recipient's email address. If using ECU credentials, benefit from suggested people by typing names or email addresses. For initial testing, enter your own Outlook email address in the "To" field, ensuring effective verification of the notification setup.



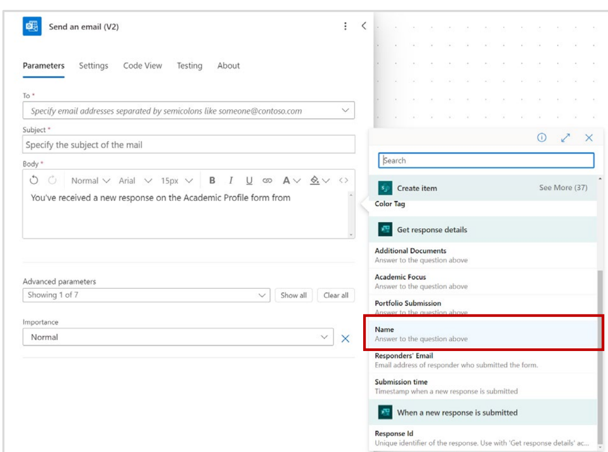
3. Define Email Subject

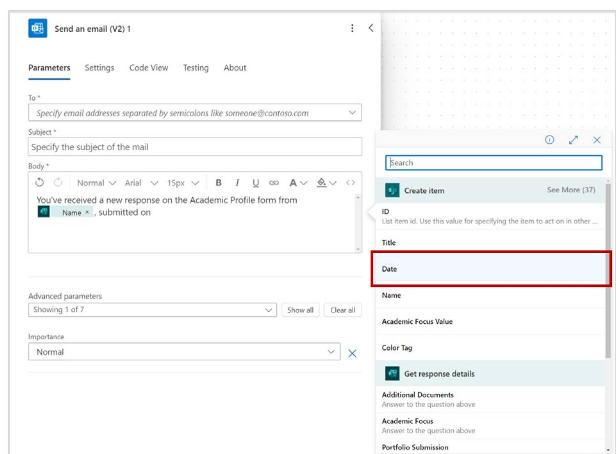
In the "Subject" field enter a clear and concise subject. We recommend including the form name in the subject for quick identification. This ensures recipients can easily discern the associated form just by glancing at the email subject, facilitating efficient organization.



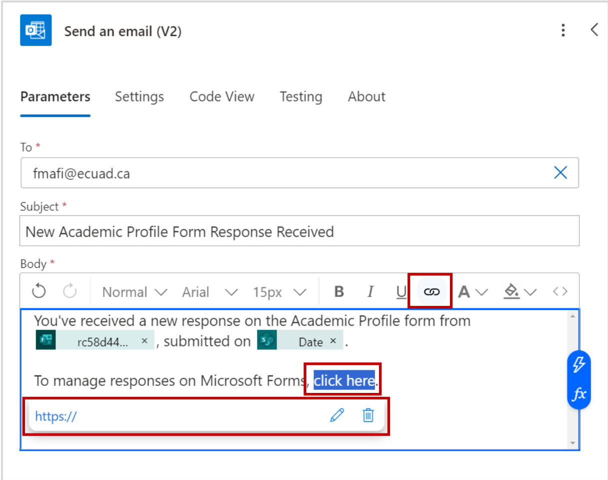
4. Specify the Email Content

In the body of the email, you can craft a message that informs the recipient about the new form submission. For example, you can include a sentence like: "You've received a new response on the Academic Profile form from [Responder Name], submitted on [Submission Date]." Here, "[Responder Name]" and "[Submission Date]" are placeholders that will be replaced with the actual responder's name and submission date when the email is sent. You can use dynamic content to insert these values automatically from the previous steps in your workflow.



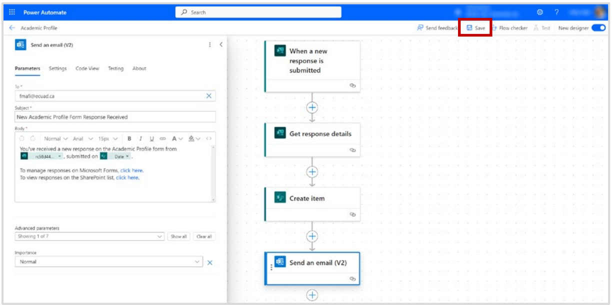


Additionally, you can enhance the email by providing links to manage responses on Microsoft Forms and view responses on the SharePoint list. For example, you can include text like: "To manage responses on Microsoft Forms, click [here](Microsoft Forms Link). To view responses on the SharePoint list, click [here](SharePoint List Link)." When recipients click on these links, they will be directed to the respective pages where they can manage or view the form responses. To add a link, select the text (e.g., "click here") and click on "Insert Link," then paste the link to the desired page.



5. Save Flow and Test Email Notification

Click "Save" to save your flow configuration.



Next, submit a form to trigger the workflow. Monitor your Outlook email, and you should receive the email notification with the customized content reflecting the form details.