Chapter 16

Collaborating with Forms and Notes

IN THIS CHAPTER

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» **Constructing a form to gather information**

» **Sending out a quiz or survey**

» **Creating notes that contain text, images, drawings, and more**

» **Collaborating with other people on forms and notes**

This chapter completes my tour of G Suite's extensive collaboration tools by taking a quick look at two more apps that enable you to work together with people both inside and outside your organization. The first app I investigate is called Forms and, as its name implies, you use it to construct forms that gather information from people. It might be a form that enables people to register for an event, order a product or service, give feedback about something, take a survey, or test their knowledge with a quiz. Whatever the content of the form, the Forms app gathers the responses automatically so that you can later analyze them.

The second app I discuss in this chapter is called Keep and, as its name doesn't imply, you use it to store relatively simple notes. These notes can include short text snippets, a list of check boxes (for, say, a to-do list), images, drawings, and more.

With both forms and notes, you can split the workload by having multiple people collaborate with you. This chapter tells you everything you need to know.

Gathering Info with Forms

One of the simplest, yet most useful, ways to collaborate with others is to ask them for information. For example, you might ask your customers for feedback about a product or service, or you might ask coworkers for feedback about an event you hosted. Want to know what people think about a topic? Send them a survey. Want to measure how much people know about a subject? Give them a quiz.

"Sounds great," I hear you thinking, but it also sounds like a ton of work. It certainly would be if you have to build the necessary forms with the sweat of your own brow. Fortunately, you can build forms sweat-free with Google Forms. Whether you modify an existing template or construct a form from scratch, Forms makes it easier than you might think to publish professional-looking feedback forms, registration forms, evaluations, surveys, quizzes, and much more.

Loading the Forms website

When you feel up to it, use either of the following techniques to get the Forms home page in sight:

>> Convince your web browser to take you to `https://forms.google.com`. (Note that you actually end up on `https://docs.google.com/forms`, but the first address is shorter to type.)

>> If you're in a G Suite app that has the Google Apps icon (such as Mail or Calendar), click Google Apps and then click Forms.

Touring the Forms home page

When you first get to Forms, you see the home page, which looks similar to the page shown in Figure 16-1.

Let's take a quick trip around the screen so that you know what's what here (refer to Figure 16-1, which points out the features in the list that follows):

- » **Main menu:** Click this icon to open the Main menu, which gives you access to other G Suite apps (such as Docs and Sheets), Settings, and Drive. To close the menu, click any empty space outside of the menu.

- » **Search:** Search Forms for the item you want.

- » **Google apps:** Display icons for all the Google apps.

- » **Google account:** Gain access to your Google account.

- » **Start a new form:** Display a few templates that you can use to start a new form. A *template* is a document that comes with predefined text, formatting, and (sometimes) images to get you off to a good start.

- » **Template gallery**: Click here to see the complete list of Forms templates.

- » **Recent forms:** These are the three forms you've worked on most recently.

- » **Open file picker:** Click this icon to open a file from Drive or upload a file from your computer.

Main menu   Search   See all the templates   Google apps   Google account

Forms you've worked with most recently

Open file picker
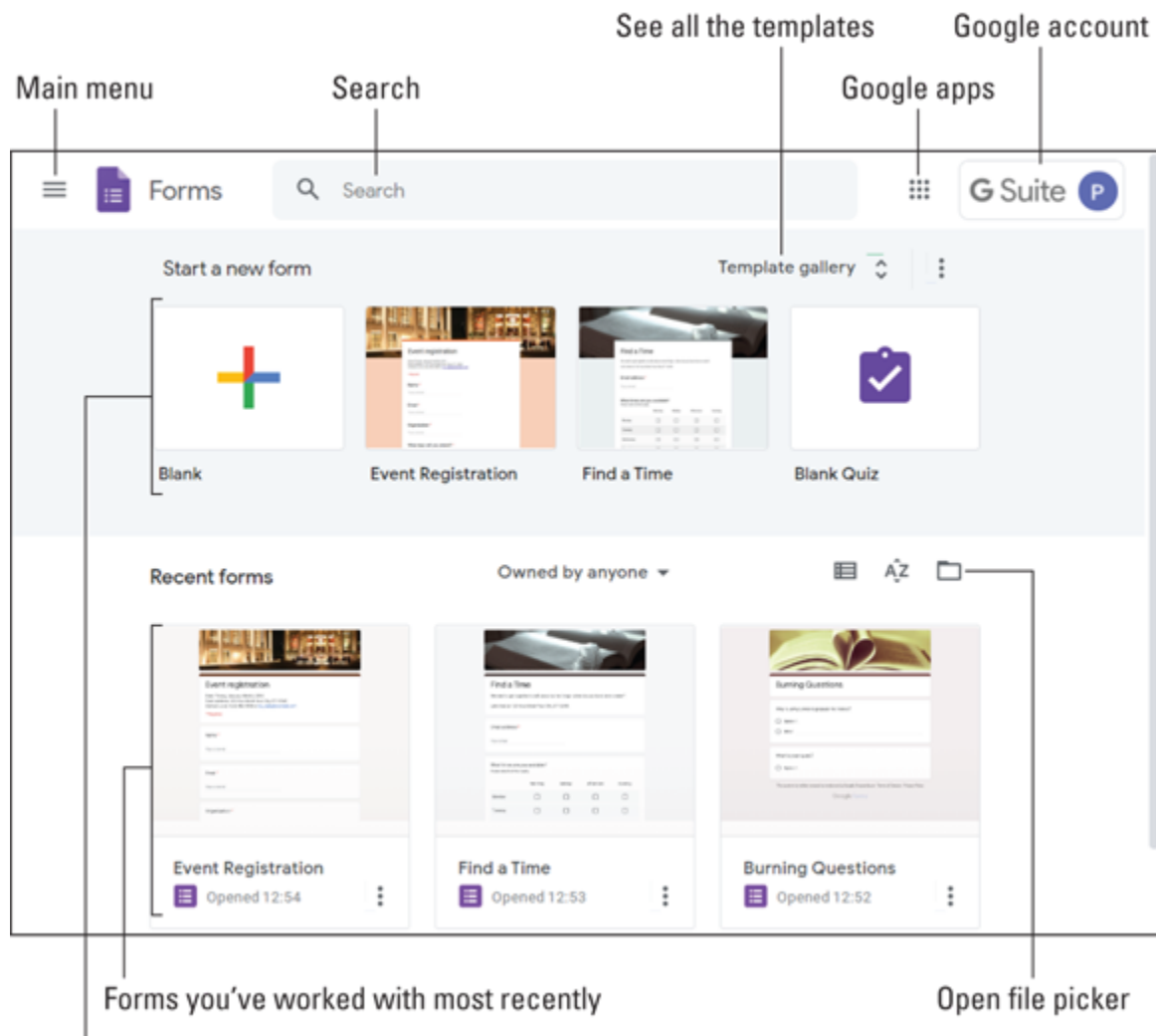
Some possible ways to launch a new form

FIGURE 16-1: The home page is your Forms jumping-off point.

Creating a new form

Once you land on the Forms home page, you'll want to create a new form. You have two ways to ask Forms to create a new document for you:

» **To open an empty form** (that is, a form with no predefined text or formatting), click Blank.

» **To open a form that has some ready-to-edit text and formatting,** either select one of the template tiles shown in the Start a New Form section or click the Template Gallery button and then choose a template from the long list of possibilities that Forms displays.
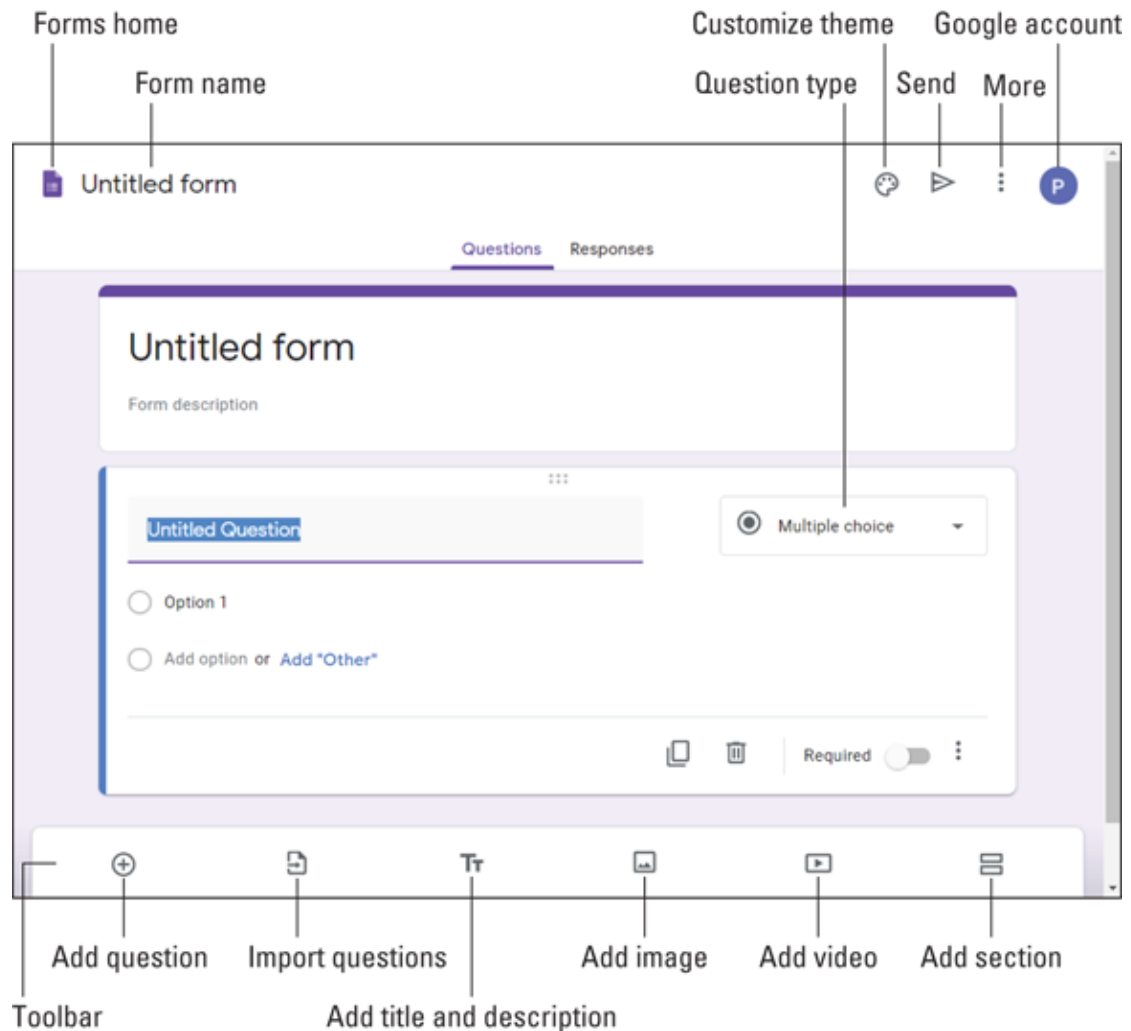
Touring the form screen

When you create a form from scratch, you end up at the Untitled Form screen, shown in <u>Figure 16-2</u>, which includes the following features:

» **Document area:** Where you add, edit, and format your document text.

» **Forms home:** Takes you back to the Forms home page.

» **Form name:** The name you've given the form. When you start a new form, the area says `Untitled form`.

» **Customize theme:** Enables you to modify the overall look of the form.

» **Send:** Ships out the form when you're done.

» **More:** Displays a menu of commands.

» **Google account:** Gives you access to your Google account.

» **Toolbar:** Offers quick access to some useful form features.

Fabricating a form

With your new form waiting for your input, here are the general steps to go through to build a working form:

1. **Enter a title for the form.**

2. **Enter a description for the form.**

Forms home

Form name

Customize theme   Google account

Question type   Send   More

Untitled form

Questions   Responses

Untitled form

Form description

Untitled Question

Multiple choice

○ Option 1

○ Add option or Add "Other"

Required

Add question   Import questions   Add image   Add video   Add section

Toolbar   Add title and description

FIGURE 16-2: A new form and the features that surround it.

3. **Replace the Untitled Question text with the question you want to ask.**

4. **Use the Question Type list (refer to Figure 16-2) to select the format of the question.**

   There are ten question formats in all, including Multiple Choice (respondents choose one out of a group of possible answers), Checkboxes (toggle answers on and off), Drop-down (choose an answer from a list), Short Answer, and Paragraph (a longer answer).

   The response controls you see depend on the question format. (For example, Multiple Choice uses radio buttons.)

If you want to reuse questions you added to a previous form, don't enter them from scratch. Instead, click Import Questions (refer to [Figure 16-2](#)), select the form that contains the questions, and then click Select.

5. **Enter the text for the first answer option, if required by the question format.**

6. **Add more options, as needed for the question.**

7. **Click the Add Question icon (pointed out in [Figure 16-2](#)).**

For longer forms, or forms that cover multiple subjects, it often helps to break up the form into multiple sections. To add a section to your form, click the Add Section icon (pointed out in [Figure 16-2](#)).

8. **Repeat Steps 3–6 for the new question.**

9. **Repeat Steps 7 and 8 until your form is complete.**

10. **Give your new form a trial run by clicking the More icon and choosing Preview from the menu that appears.**

Constructing a quiz

If you want your form to be a quiz, you need to make a couple of adjustments:

» Click the More icon, and then choose Settings from the menu that appears so that you can open the Settings dialog box. Select the Quizzes tab and then click the Make This a Quiz toggle. By default, Forms shows the user their score immediately after they submit the quiz. If you prefer to review the quiz first, click the Later, After Manual Review option. Click Save to convert your form to a quiz.

If you're starting your quiz from scratch, the easiest way to go is to select the Blank Quiz template in the Template Gallery.

» For each question, you now see an Answer Key link. Click Answer Key, set the number of points you want to assign to the question, choose which option is (or options are) the correct answer, and then click Done.

Adding form collaborators

Why build a form yourself when you can cajole other people in (and out) of your organization to chip in and help? I can't think of a reason! To bring one or more collaborators on board, click the More icon (pointed out in Figure 16-2) and then choose Add Collaborators from the menu that appears. In the Sharing Settings dialog box that drops by, you have two ways to entice people to work on your form:

» **Share a link:** Under Who Has Access, click Change to open the Link Sharing dialog box, select who you want to share the form with, and then click Save. Copy the address that appears in the Link to Share box, and then paste the address in an email, a text, a web page, or wherever.

» **Invite people via email:** Use the Invite People text box to enter the names or email addresses of the people you want to invite to collaborate. If you want to include a custom message in your email, click Add Message and then enter your message in the text box. Click Send to fire off the invitations.

Sending your form

When your form (or quiz) is complete and you've previewed it successfully, it's time to make the form available to its respondents. You have three ways to make a form available: email, link, and web page.
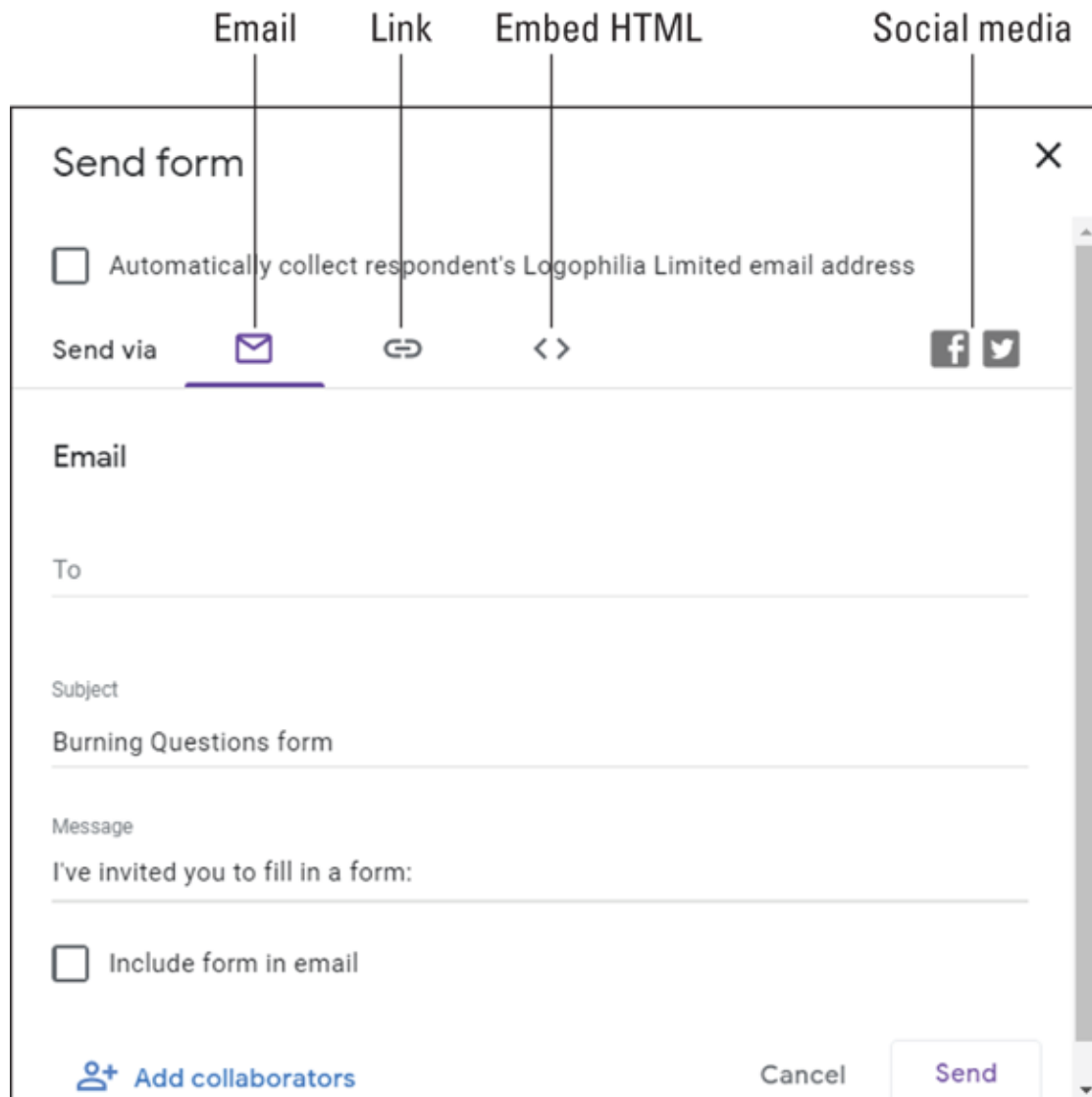
Actually, there's a fourth way to share your form: via social media. As pointed out in Figure 16-3 (see the following section), you can click either the Facebook icon or the Twitter icon to share a link to your form on those sites.

Emailing a form

If you want only select people in your organization to fill out the form, send the form via email by following these steps:

1. **Click Send (pointed out in Figure 16-2).**

2. **In the Send Via section, click the Email icon. (See Figure 16-3.)**

Email Link Embed HTML   Social media

Send form   ✕

☐ Automatically collect respondent's Logophilia Limited email address

Send via ✉   🔗   < >   f 𝕐

Email

To

Subject

Burning Questions form

Message

I've invited you to fill in a form:

☐ Include form in email

☺⁺ Add collaborators   Cancel Send

FIGURE 16-3: In the Send Form dialog box, use the Email interface to share your form via email.

3. **Use the To field to select each person in your organization that you want to fill out the form.**

4. **Edit the Subject line, if needed.**

5. **Edit the Message field, if you want to.**

6. **Click Send.**

Forms ships out the email, which includes a Fill Out Form button that users click to go to the form.

Sharing a link to a form

If you want to share your form not only via email but also via text, chat, or any other text medium, you need to get a link to the form and send the link to your peeps. Here's how it's done:

1. **Click Send (pointed out in Figure 16-2).**

2. **In the Send Via section, click the Link icon. (Refer to Figure 16-3.)**

   The Send Form dialog box shows the link to the form.

   TIP   Form addresses tend to be quite long. If you prefer to send a shorter version of the address, click the Shorten URL check box.

3. **Click Copy.**

   Forms copies the form address to your computer's Clipboard.

4. **Paste the link into whatever media you want to use to share the form.**

5. **Click Close (X).**

Embedding the form in a web page

If you want to make your form available to anyone who has access to a particular web page, and you know how (or know someone who knows how) to add HTML to the page, follow these steps to embed the form's HTML code in the page:

1. **Click Send (pointed out in Figure 16-2).**

2. **In the Send Via section, click the Embed HTML icon. (Refer to Figure 16-3.)**

   The Send Form dialog box shows the HTML code for the form.

3. **Use the Width and Height text box to specify the dimensions of the frame that holds the form.**

4. **Click the Copy button.**

Forms copies the form HTML to your computer's Clipboard.

5. **Paste the HTML into your web page code.**

6. **Click Close (X).**

Checking out the form responses

When your respondents complete your form and click Submit, the submitted forms start showing up on the form's Responses tab. Here you see a summary of the responses, question-by-question results, and user-by-user responses. You also get a Create Spreadsheet icon to load the responses into a Sheets file for data analysis. Sweet!

Sharing Notes

You can use the Keep app to create simple text documents for things such as to-do lists and meeting notes. A word processing app such as Docs is useful for creating complex and lengthy documents. However, this powerful tool feels like overkill when all you want to do is jot down a few notes. For these simpler text tasks, the Keep app that comes with G Suite is perfect because it offers a simple interface that keeps all your notes together.
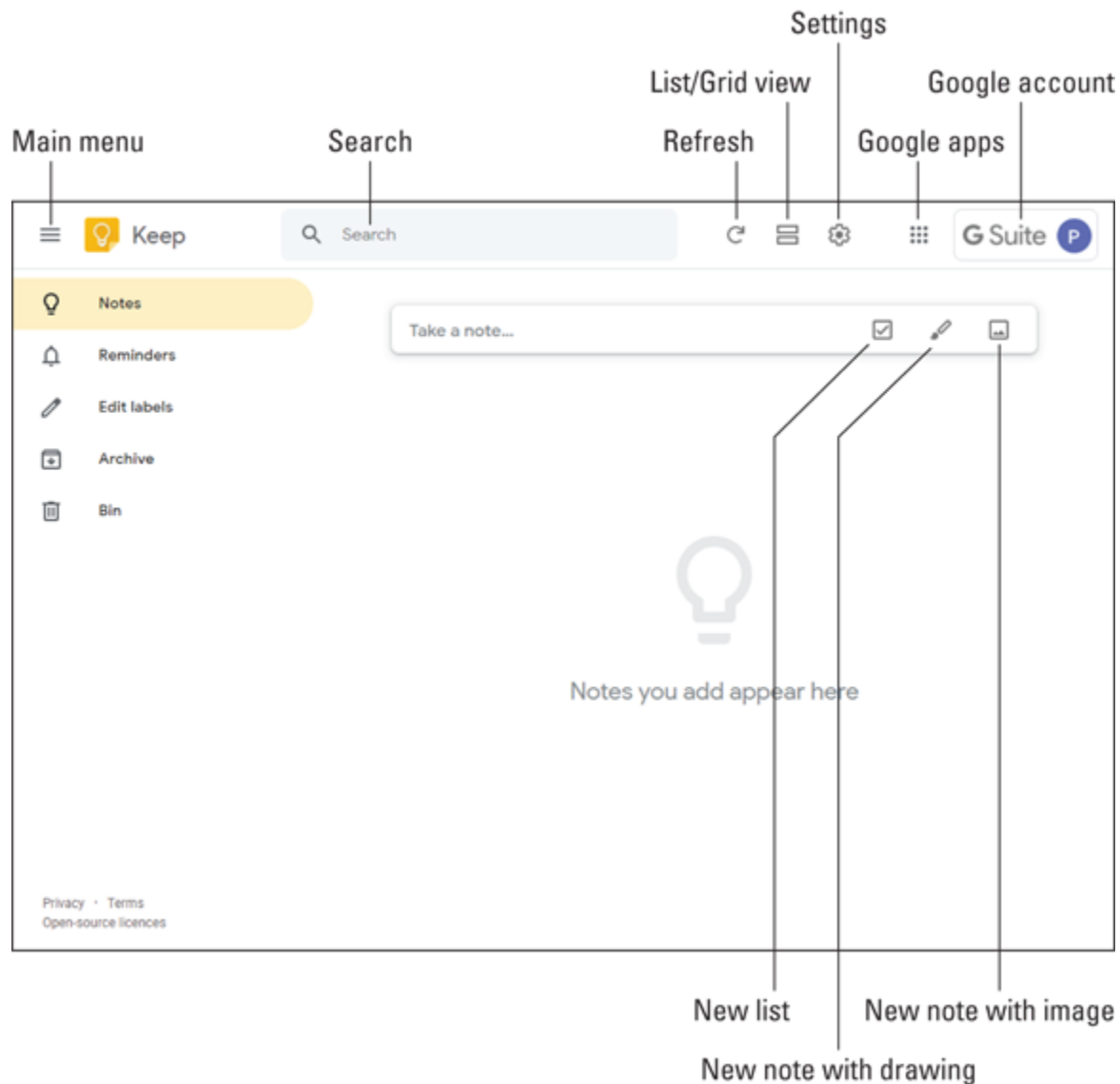
Checking out the Keep home page

Are you ready to see what Keep can do? That's the spirit. Accompanied by an optional fist pump, use either of these techniques to land safely on the Keep home page:

» Whisper the following address into your web browser's ear: https://keep.google.com.

» If you're in a G Suite app that has the Google Apps icon (such as Forms or Groups), click Google Apps and then click Keep.

The Keep home page that you see when you first arrive looks like the page shown in Figure 16-4. (Although, note that Figure 16-4 shows the Keep home page as it appears in the Google Chrome web browser. Other web browsers might not offer every feature you see here.)

FIGURE 16-4: The Keep home page.

Let's take a quick trip around the screen so that you know what's what here (refer to Figure 16-4, which points out the features in the list that follows):

» **Main menu:** Click this icon to toggle Keep's Main menu between icons only and icons with titles.

» **Search:** Search Keep for the note you want.

» **Refresh:** Ask Keep to check for new or changed notes.

» **List/Grid view:** Toggle the notes display between a list and a grid.

» **Settings:** Display a menu of Keep settings.

» **Google apps:** Display icons for all Google apps.

» **Google account:** Gain access to your Google account.

Creating a new note

As shown in <u>Figure 16-4</u>, the Keep home page includes a box with the text `Take a note` that's awfully tempting. When you can't take it any longer, follow these steps to create a note:

1. **Click inside the Take a Note text box.**

   Keep opens the new note for editing, as shown in <u>Figure 16-5</u>.
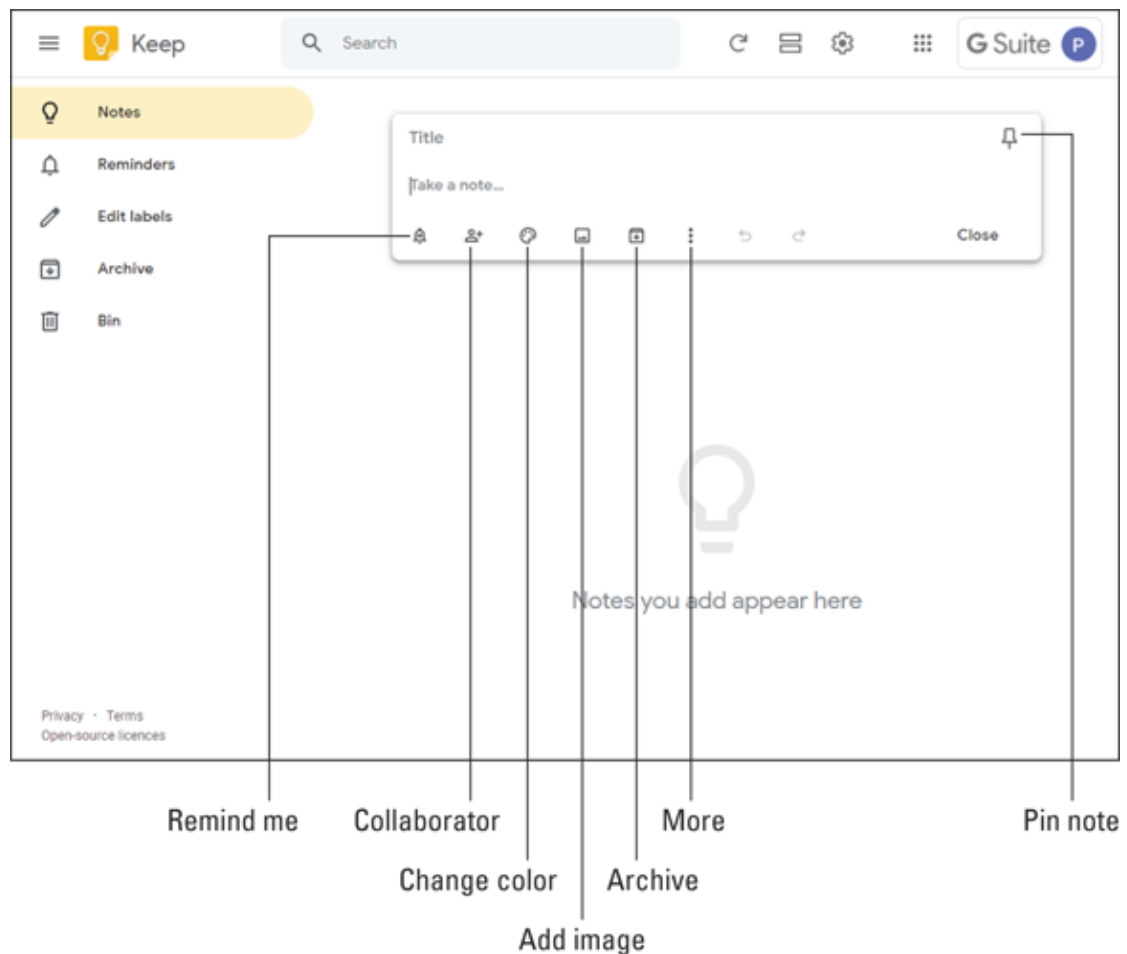
FIGURE 16-5: An empty note, yearning to be filled.

2. **Use the Title text box to enter a title for your note.**

3. **Use the Take a Note text box to enter your note text.**

   If all you want to do is create a basic note, you're pretty much done, so feel free to skip way down to step 10.

4. **If you want to be reminded about your note, click Remind Me and then select the time you want to be reminded.**

5. **To set the background color of the note, click the Change Color icon and then choose the color you prefer from the palette that appears.**

6. **To insert an image into the note, click Add Image, select the image file in the Open dialog box that appears, and then click Open.**

7. **To add a label to your note, click the More icon, choose Add Label from the menu that appears, enter your label name, and then press Enter.**

8. **To add a drawing to your note, click the More icon, choose Add Drawing from the menu that appears, create your drawing in the window that appears, and then click Back (the left-pointing arrow).**

9. **To add check boxes to the note, click the More icon and choose Show Tick Boxes from the menu that appears.**

10. **When you're done, click Close.**

    Keep saves your note.

REMEMBER If a note contains information you want to refer to often, or if you know you need to add info to a note frequently, you can keep the note handy by clicking the Pin Note icon. (Refer to Figure 16-5.) Keep creates a new Pinned section at the top of the window and adds the note to that section.

If you want to create a note that includes elements other than plain text, Keep gives you three slightly quicker methods to get the note off the

ground:

» To start a new note that has a list of check boxes, click the New List icon. (Refer to Figure 16-4.)

» To start a new note that has a drawing, click the New Note with Drawing icon. (Refer to Figure 16-4.)

» To start a new note that has an image, click the New Note with Image icon. (Refer to Figure 16-4.)

Adding note collaborators

Notes are such simple affairs that the idea of collaborating on a note might seem odd. However, consider these ideas:

» If you have no artistic skill whatsoever, but a colleague does, it would make sense to ask that colleague to add a drawing to a note.

» If a colleague has an image you need for a note, the easiest way to use that image would be to add that colleague as a collaborator.

» If you and some members of your team are brainstorming a topic, you can all record your ideas in a shared note.

I'm sure you can think of 1,001 uses for sharing notes, so here's how you actually do it:

1. **Select the note you want to share.**

2. **Click the Collaborator icon (pointed out in Figure 16-5).**
   Keep opens the Collaborators dialog box.

3. **Enter the name or email address of a person in your organization you want to collaborate on the note.**

4. **Click the Add Collaborator icon (the check mark).**

5. **Repeat Steps 3 and 4 until you've specified all the collaborators you want to work on your note.**

6. **Click Save.**

Keep shares the note with the people you specified. For people in your organization or people with a Google account, the note appears automatically in the person's Keep window.

TIP   If someone shares a note with you but you don't want to contribute to the note, you can take yourself off the list of collaborators. Select the note, click the More icon, choose Remove Myself from the menu that appears, and then, when Keep asks you to confirm, click Delete.