

# User Manual for



**Created By:**  
**Christopher Cook**  
**Yuen Lam Leung**  
**Caleb Talley**  
**Olivia Rockrohr**

# Table of Contents

|  |           |
|--|-----------|
| <b>1. Logging in</b>   | <b>2</b>  |
| <b>2. Introduction to Homepage</b>   | <b>4</b>  |
| <b>3. Creating a Survey</b>  | <b>4</b>  |
| 3.1 Create a Survey from scratch   | 5         |
| <b>3.2 Create a Survey from a template</b>   | <b>9</b>  |
| 3.3 Create a survey by copying previous survey   | 10        |
| 3.4 Creating a template from a survey (Optional)   | 11        |
| <b>4. Editing Survey Fields</b>  | <b>12</b> |
| <b>4.1 Submissions section features</b>  | <b>12</b> |
| <b>5. Exporting and Analyzing Data</b>   | <b>13</b> |
| 5.1 How to export data to excel  | 13        |
| 5.2 Visualize data   | 17        |
| <b>6. Using the App</b>  | <b>21</b> |
| 6.1 Introduction   | 21        |
| 6.2 Filling out surveys (Kiosk mode)   | 28        |
| You will now be able to fill out your survey and submit multiple times as it refreshes automatically. To exit kiosk mode, click the x icon | 31        |
| <b>6.3 Viewing Submissions</b>   | <b>32</b> |
| <b>7. Formatting Data in Excel Spreadsheet</b>   | <b>33</b> |

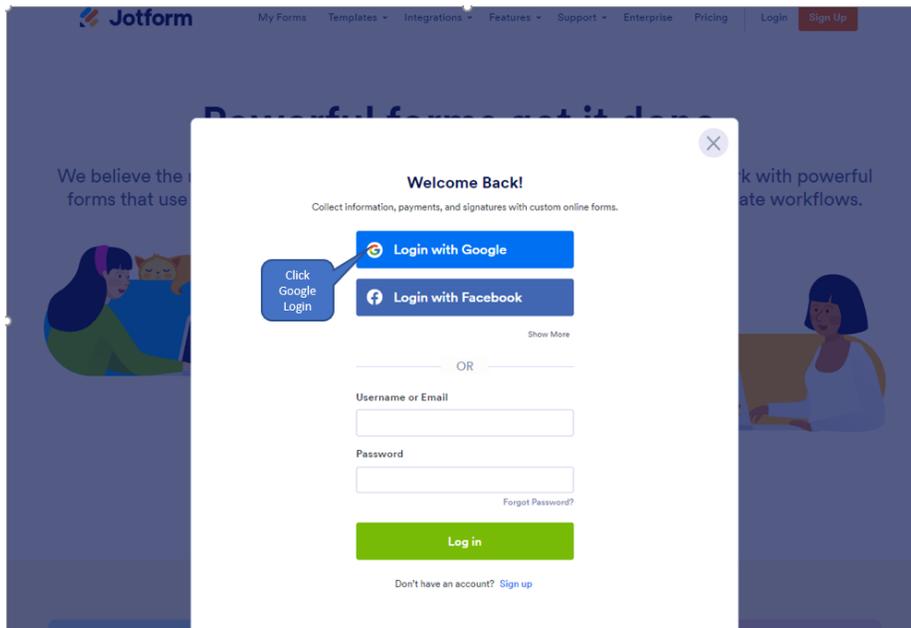
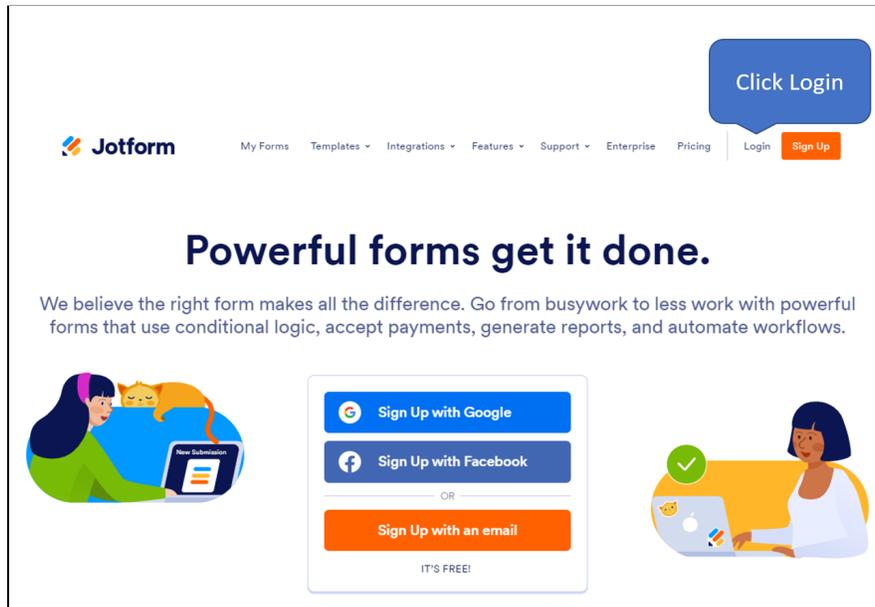
# 1. Logging in

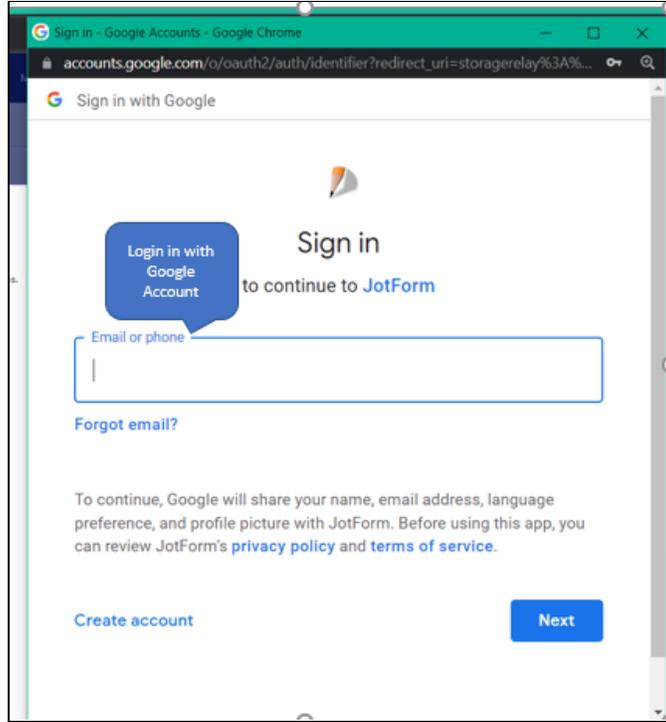
Follow the steps below to login

Go to **jotform.com** > Select **Login** > Enter your credentials

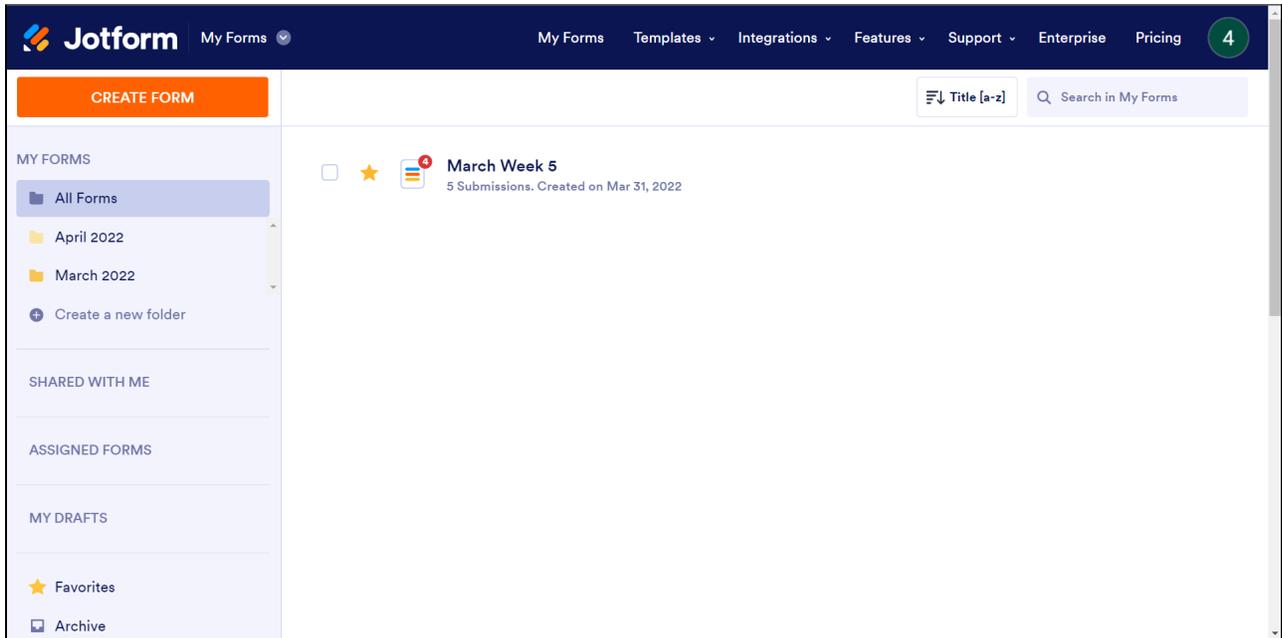
If you created an Jotform account using Google, you can login directly by:

Go to **jotform.com** > Select **Login** > Login with **Google Account**



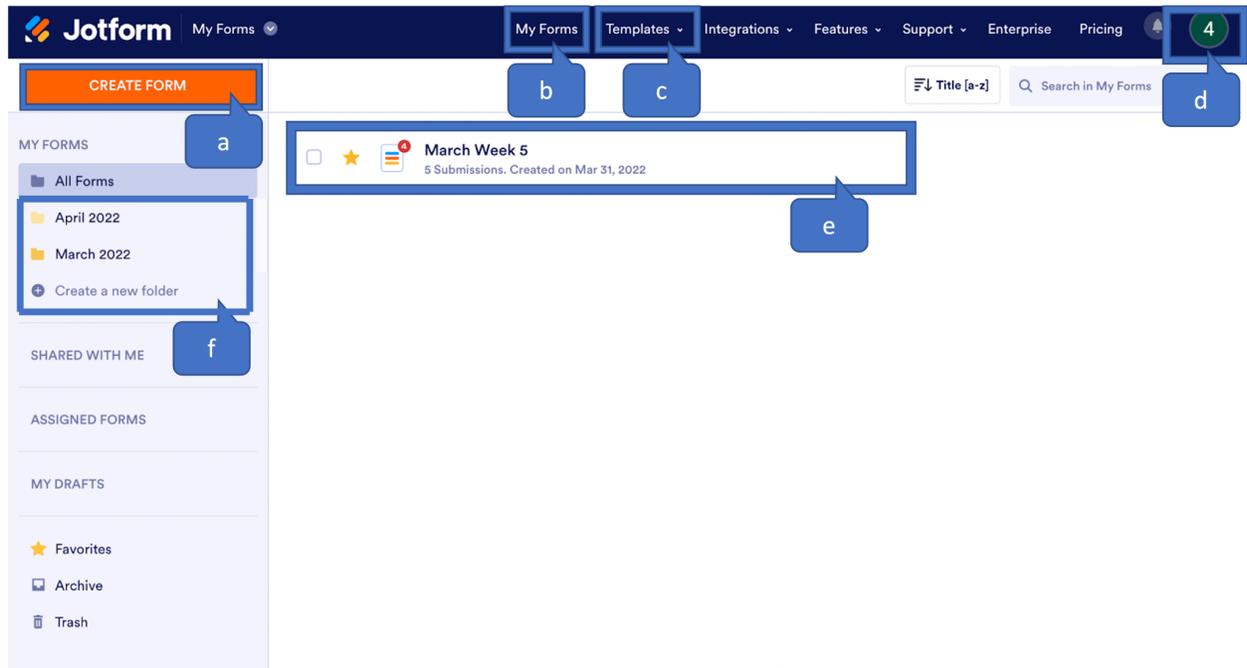


After logging in, you will see the default homepage.



## 2. Introduction to Homepage

Once you log in to your Jotform account, the default home page should look like this:



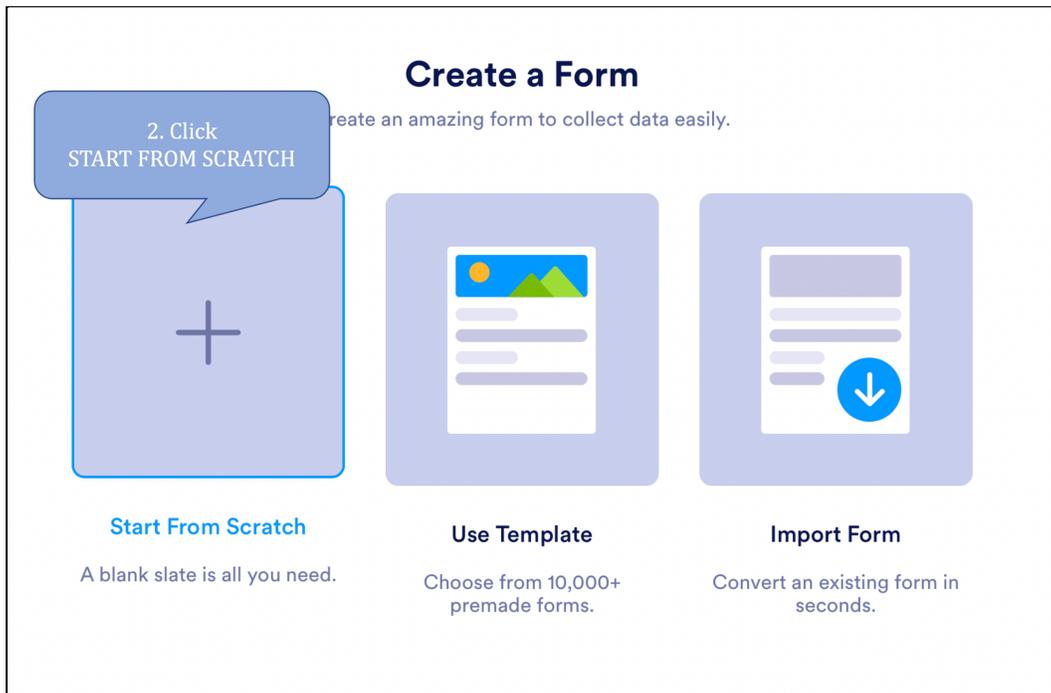
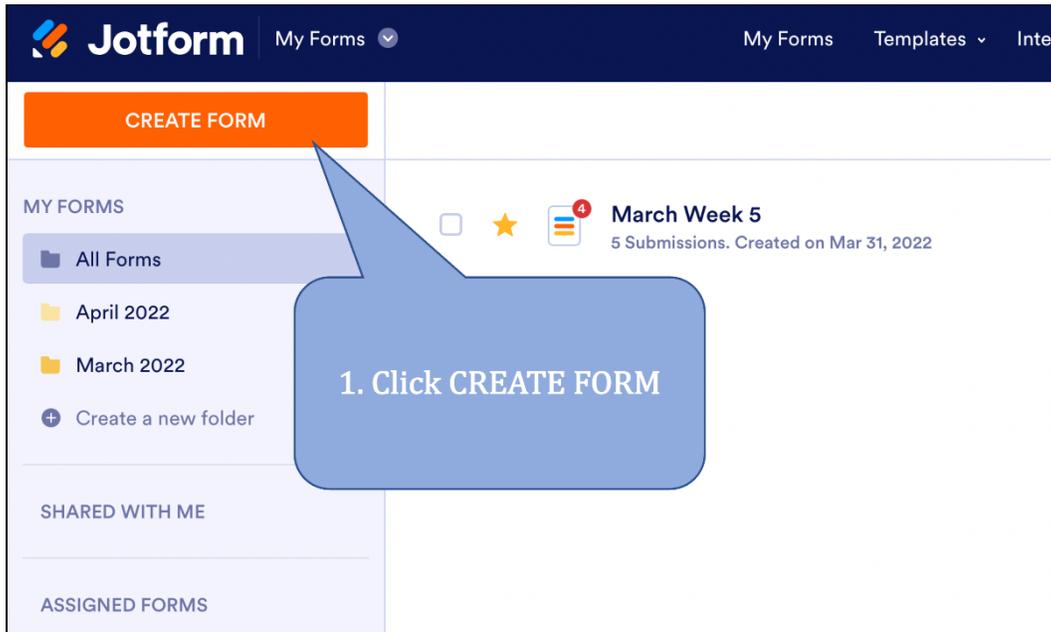
In the screenshot above, we have marked the following features:

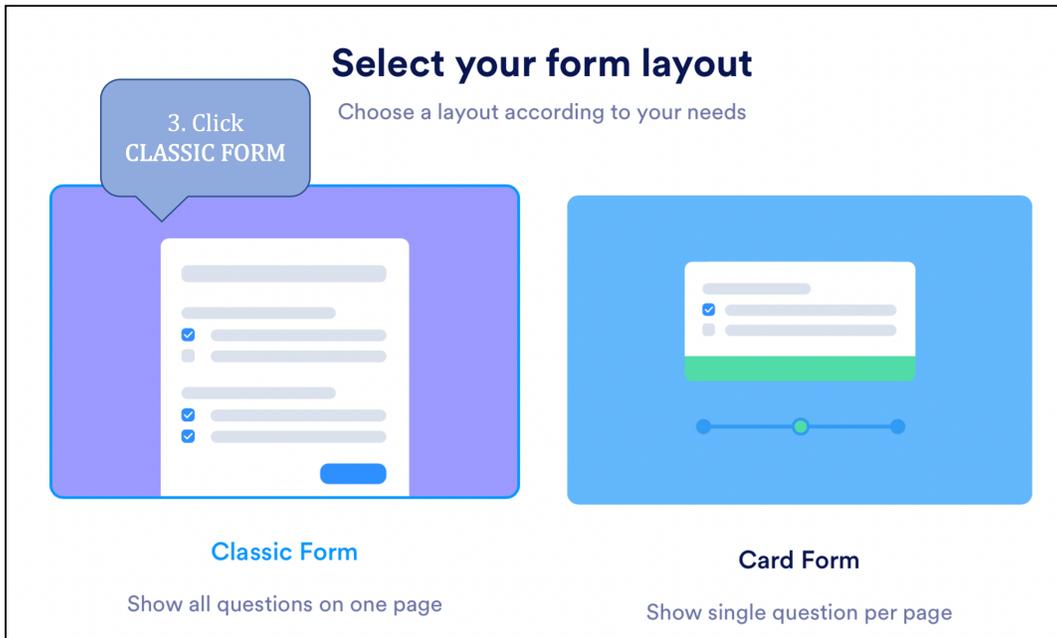
- a. Button to create a form
- b. Button to access your forms
- c. Button to access templates
- d. Button to access your account
- e. The forms you've created
- f. Folders storing different forms

### 3. Creating a Survey

#### 3.1 Create a Survey from scratch

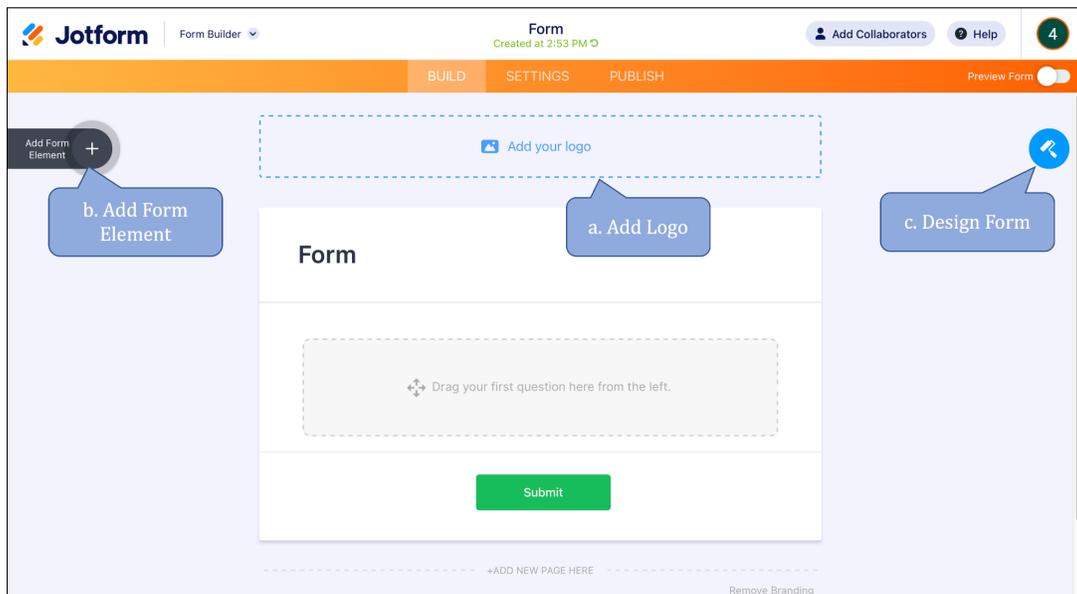
Go to **Home Page (My Forms)** > Step 1. Select **Create Form** > Step 2. Select **Start From Scratch** > Step 3. Select **Classic Form**



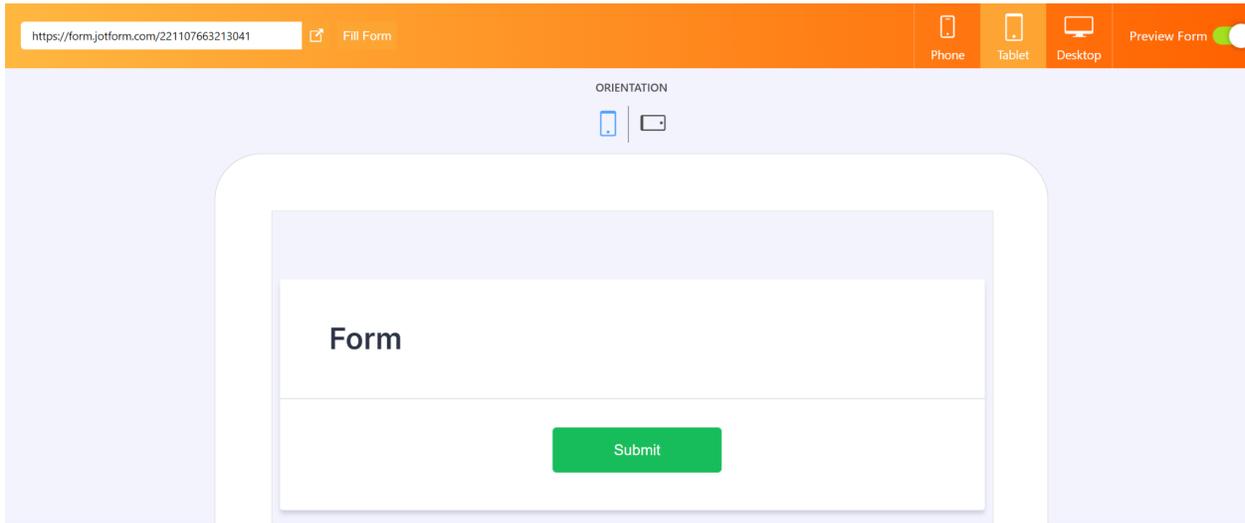


As you enter the **Form Builder**, you will see several options including:

- a. Adding a logo: You can add the EBS logo here by dragging and dropping an image file inside the dotted line, or uploading an image from your computer
- b. Adding form elements You can add form element such as multiple choice, drop down list, short text, etc
- c. Designing form: You can change font style, page color, theme of the form, etc.



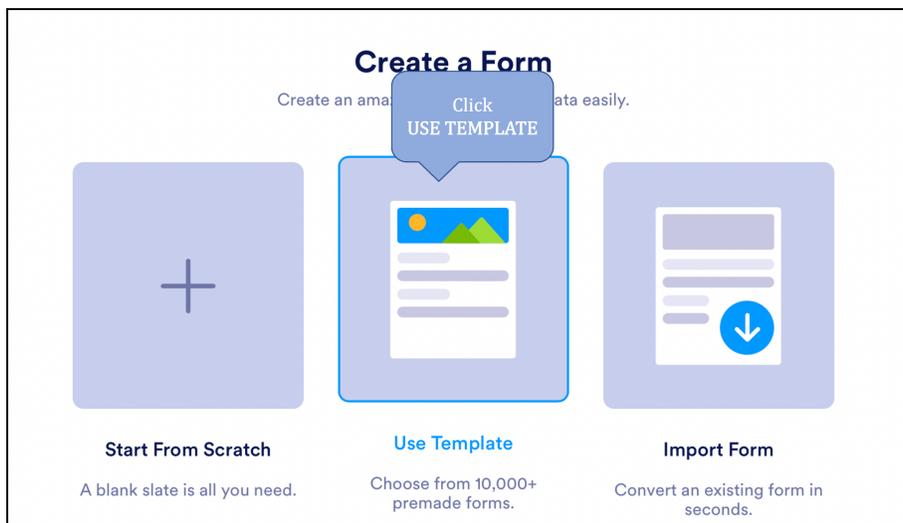
If you toggle the switch “Preview Form”, you will be able to see what your survey will look like on a phone, tablet or desktop.



### 3.2 Create a Survey from a template

You can create forms using one of the templates provided by Jotform. Available templates include order, registration, contact, RSVP forms, etc.

Go to **Home Page (My Forms)** > 1. Select **Create Form** > 2. Select **Use Template**



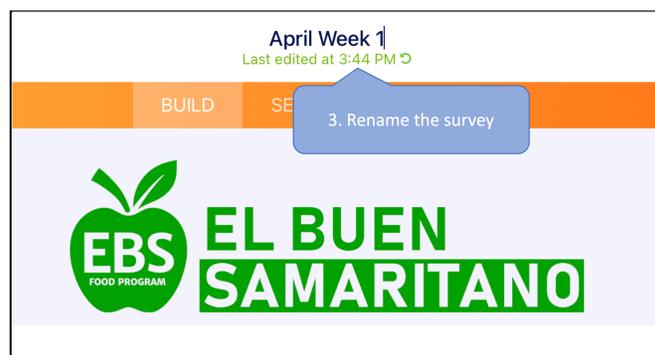
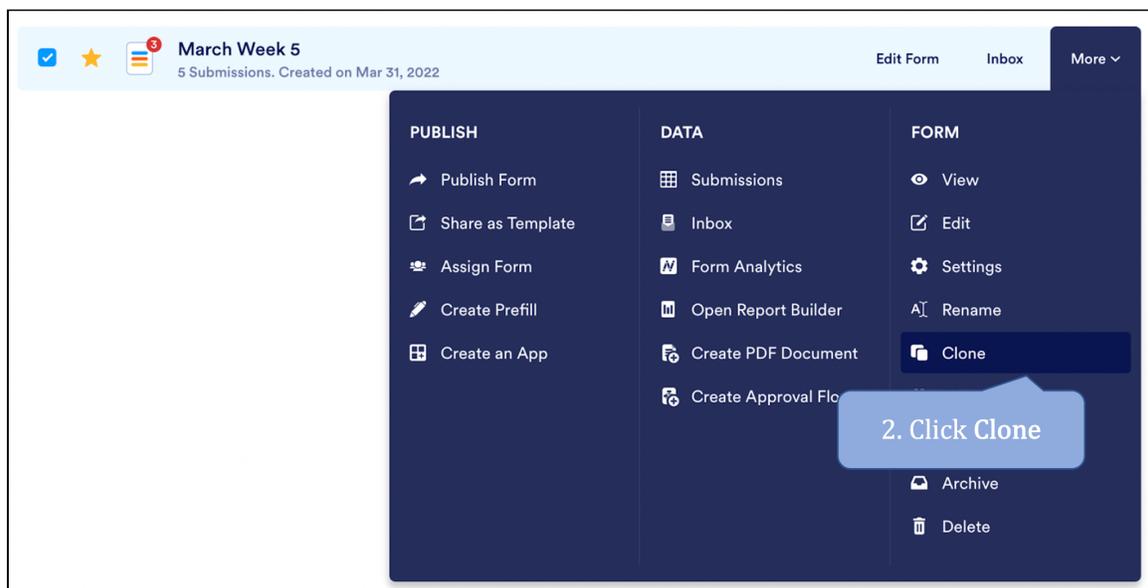
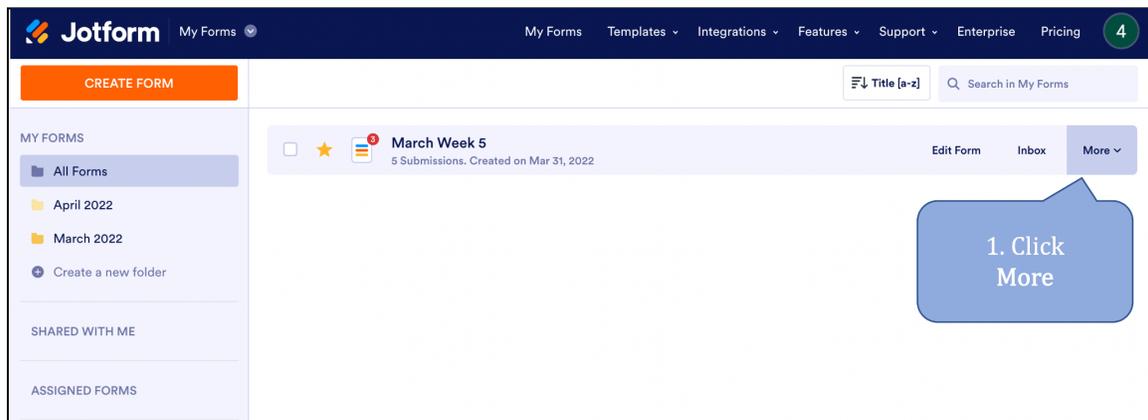
You will then see a variety of templates available, and you can look up templates with the search bar as well. Hover your mouse over the icon, and you can preview the template. Click **Use Template** to use the template.

The screenshot displays a web interface titled "Choose a template" with a subtitle "Select a template from the largest selection of free form templates available online." The interface includes a navigation menu on the left with categories like "Types", "Industries", and "Professions". A search bar is located at the top right. The main content area shows a grid of template preview cards, each with a title, a visual representation of the form, and a "Use Template" button. The visible templates are:

- Online Store**: A product catalog with items like "T-Shirt \$15.00", "Sweatshirt \$15.00", and "Shoes \$15.00".
- Student Registration Form**: A form for student registration with fields for "Student Name", "Birth Date", "Gender", and "Address".
- Customer Details**: A form for customer information with fields for "Full Name", "Address", and "City/State/Zip".
- Product Order Form**: A form for ordering products.
- Course Registration Form**: A form for registering for a course.
- New Customer Registration Form**: A form for new customer registration.
- Order Your Products**: A form for ordering products.
- Feedback Form**: A form for providing feedback.
- Customer Service Survey**: A survey for customer service.

### 3.3 Create a survey by copying previous survey

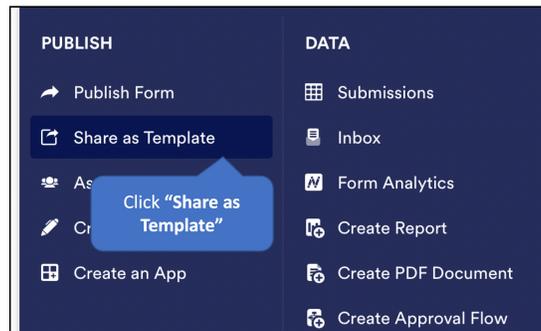
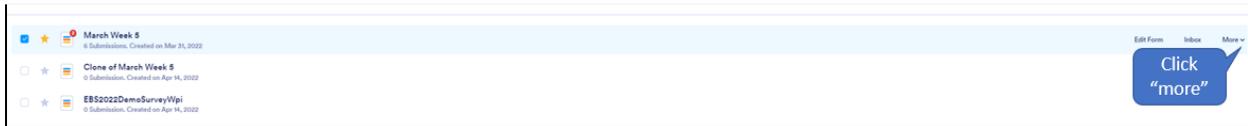
As EBS is mostly reusing the same form for collecting demographics data, we can simply clone the previous survey. Go to **Home Page (My Forms)** > 1. Select **More** on the form that you would like to clone > 2. Select **Clone**. You should see a cloned version of the survey named “Clone of ...” > 3. Select **Edit Form** to rename the survey



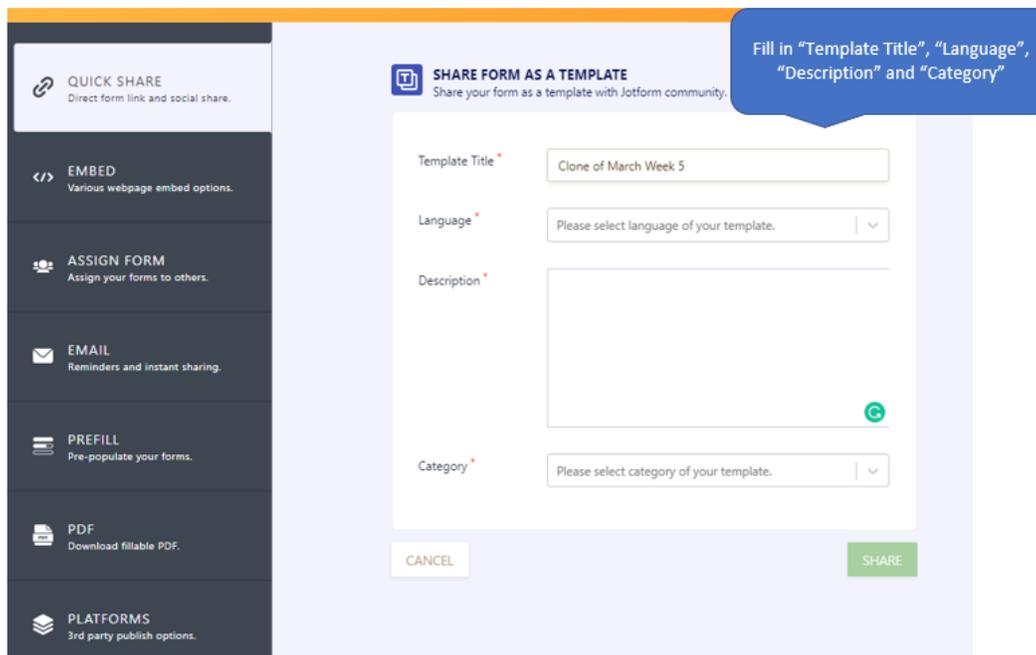
### 3.4 Creating a template from a survey (Optional)

In addition to creating your own survey, you can make it into a template so that you can use it in the future.

On the Home Page, click **More**, then click on “**Share as Template**”.



In the **Quick Share** form, fill in the **Template Title**, **Language**, **Description**, and **Category** fields. After that, hit the **Share** button.



**SHARE FORM AS A TEMPLATE**  
Share your form as a template with Jotform community.

Template Title \*

Language \* 

Description \* 

Category \* 

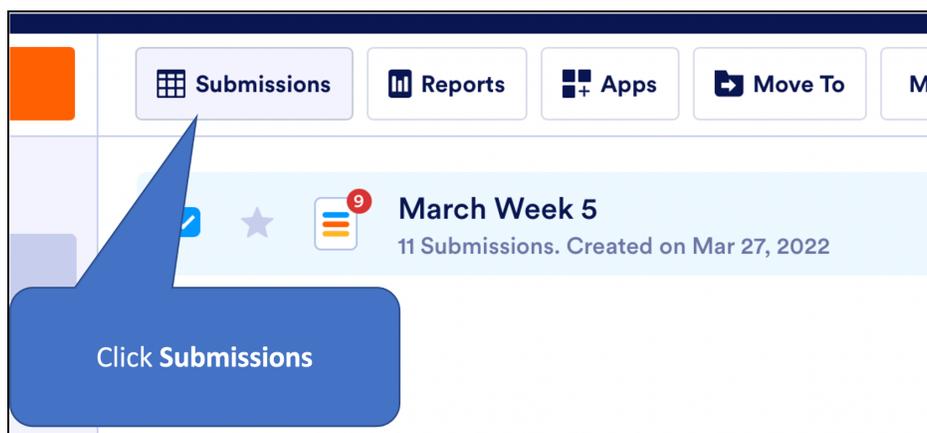
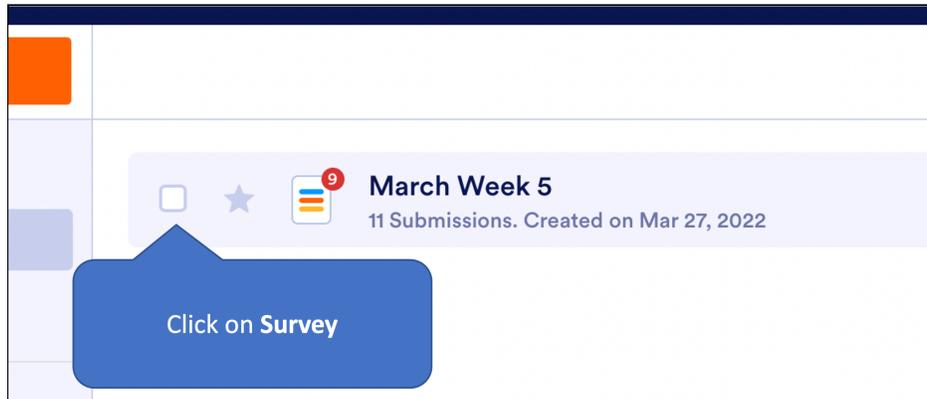
Click "Share"

After this is done, your template will be shared globally. Now simply follow the steps in 3.2 to find and use the template you made. To find your survey, type your survey's name in the search bar.

## 4. Editing Survey Fields

If you want to change the fields for one or more survey submissions, you can change the values on Jotform's native spreadsheet page.

Home Screen > Select All Forms > Click **Survey** > Click **Submissions**



### 4.1 Submissions section features

The Submissions Spreadsheet interface is similar to Excel

In the **Submissions**, you will be able to

- **Edit the fields of any individual survey**
- **Add another survey entry**

The screenshot shows the Jotform Submissions Spreadsheet interface. The table has the following columns: Submission Date, Zipcode, New to EB5?, Family Size?, 0-4?, 5-17?, 18-64?, 65+, Primary Household Income?, SNAP EBT, and WIC. The data rows show survey entries with various values for these fields.

|     | Submission Date | Zipcode | New to EB5? | Family Size? | 0-4? | 5-17? | 18-64? | 65+ | Primary Household Income? | SNAP EBT | WIC |
|-----|-----------------|---------|-------------|--------------|------|-------|--------|-----|---------------------------|----------|-----|
| 1   | Apr 8, 2022     | 01610   | No          | 5            | 0    | 3     | 2      | 0   | Employment                | No       | No  |
| 2   | Apr 8, 2022     | 01606   | Yes         | 2            | 0    | 1     | 1      | 0   | SS                        | Yes      | Yes |
| 3   | Apr 8, 2022     | 01607   | Yes         | 1            | 0    | 0     | 1      | 0   | Other                     | Yes      |     |
| 4   | Apr 8, 2022     | 01609   | No          | 4            | 0    | 3     | 1      | 0   | Unemployment              | Yes      | Yes |
| 5   | Apr 5, 2022     | 12334   | Yes         | 1            | 1    | 0     | 0      | 0   | Employment                | No       | No  |
| 6   | Apr 5, 2022     | de      | Yes         | 22           |      |       |        |     |                           |          |     |
| 7   | Apr 11, 2022    |         |             |              |      |       |        |     |                           |          |     |
| ADD |                 |         |             |              |      |       |        |     |                           |          |     |

## 5. Exporting and Analyzing Data

### 5.1 How to export data to excel

In Jotform, the responses of each survey can be exported in several formats, including excel and .csv file. The following steps show you how to export data as an excel file.

Go to **Home Page (My Forms)**

Step 1. Select **the survey you want to export**

Step 2. Select **Reports**

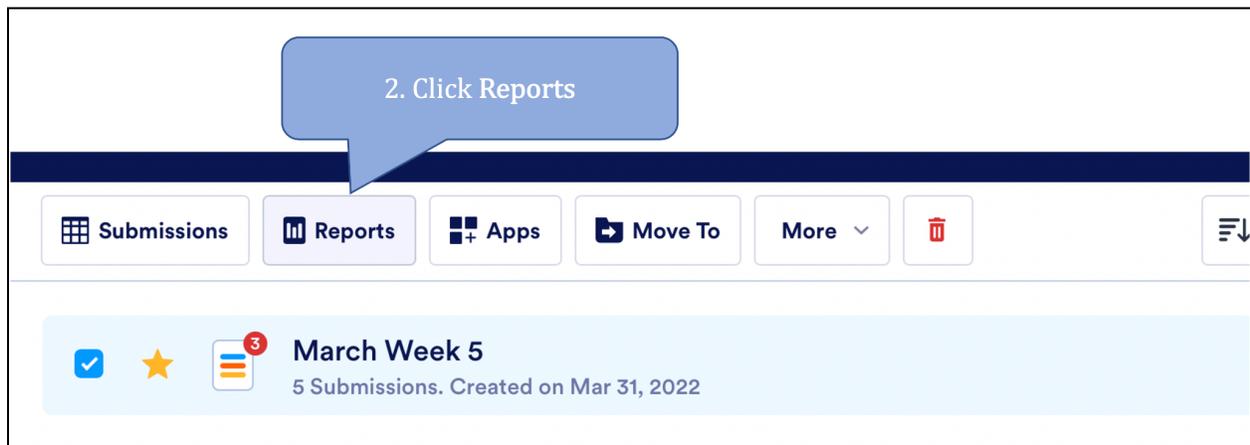
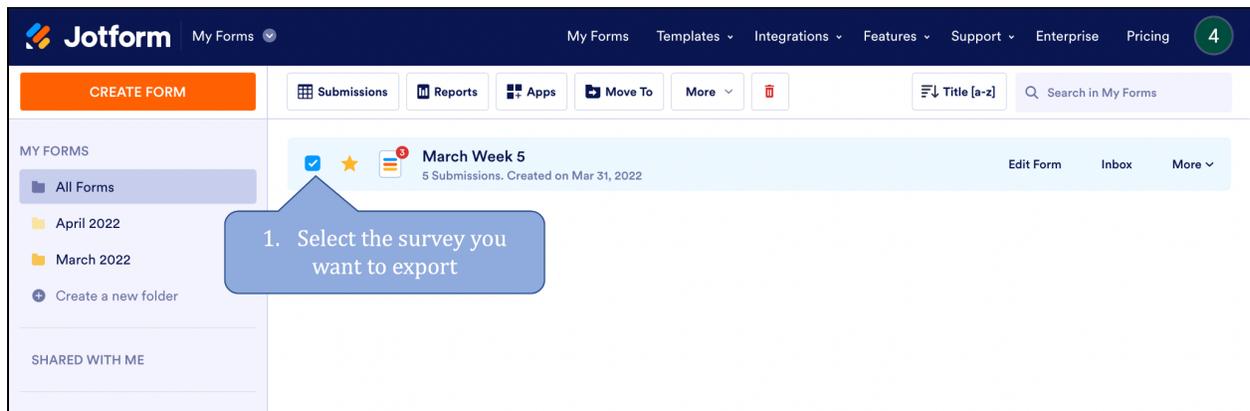
Step 3. Select **Add New Report**

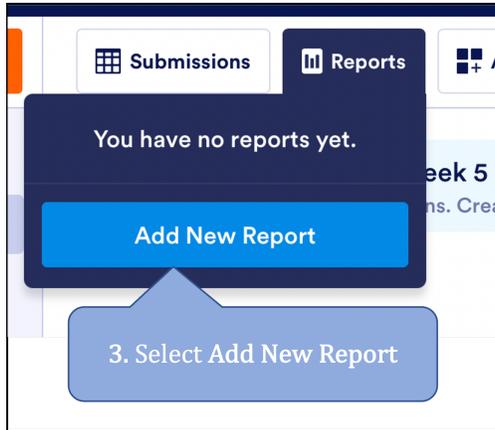
Step 4. You should now see several options to create a new report, select **Excel Report**

Step 5. Create an excel report, select **Create**

Step 6. Select **Download Report**

Step 7. Revisit generated report in the **My Report** section





### Create a new report

Select a report type and start building your report.

**Visual Report Builder**  
Create printable reports with charts and data grids.

**Excel Report**  
Create a printable Excel

**HTML Table Listing**  
Create an HTML data table to responses on your website.

**Grid Listing**

**CSV Report**

**RSS Listing**

4. Select Excel Report

You can now rename the report and select fields to include in your excel report. We recommend selecting every field except **Submission ID** and **Submission IP** to match with the excel template that we provided.

← BACK

### Excel Report

Select the fields to include in your report.

**REPORT NAME**

March Week 5 - Excel Report

**5. Check Fields to include in report**

**FIELDS**  Select All

|   |   |
|---|---|
| <input type="checkbox"/> Submission ID                        | <input checked="" type="checkbox"/> Submission Date |
| <input type="checkbox"/> Submission IP                        | <input checked="" type="checkbox"/> Zipcode         |
| <input checked="" type="checkbox"/> New to EBS?               | <input checked="" type="checkbox"/> Family Size?    |
| <input checked="" type="checkbox"/> 0-4?                      | <input checked="" type="checkbox"/> 5-17?           |
| <input checked="" type="checkbox"/> 18-64?                    | <input checked="" type="checkbox"/> 65+?            |
| <input checked="" type="checkbox"/> Primary Household Income? | <input checked="" type="checkbox"/> SNAP EBT        |

Create

Simply click **Download Report** to download the excel file.

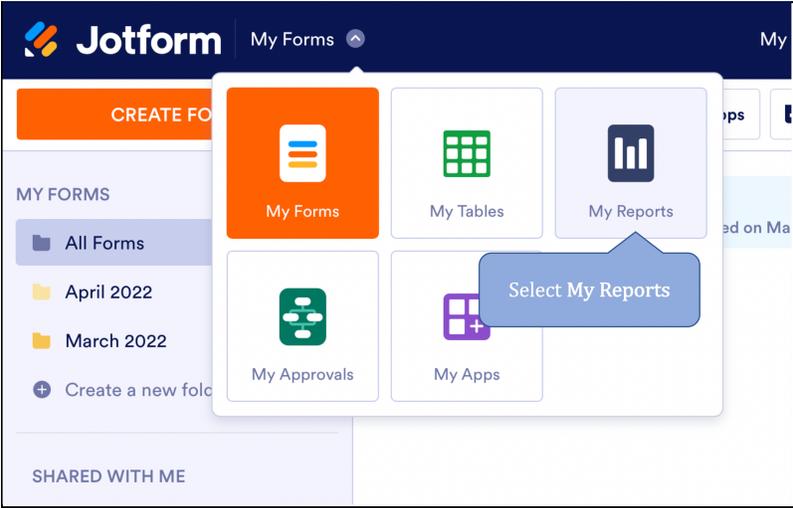
Your Report is ready.

REPORT LINK

<https://www.jotform.com/excel/221015139535044> COPY LINK

Download Report

You can revisit, edit, and download the form by going to **My Reports**, which shows all the reports you have created.



Select **Download** to download the report, and **Edit** to change setting of the report



## 5.2 Visualize data

Jotform provides colorful and clear data visualization. You can export the charts and graphs as a PowerPoint or take screenshots.

Follow the previous step in Section 5.1 to add a new report:

Go to **Home Page (My Forms)** \*The first three steps are the same as in section 5.1

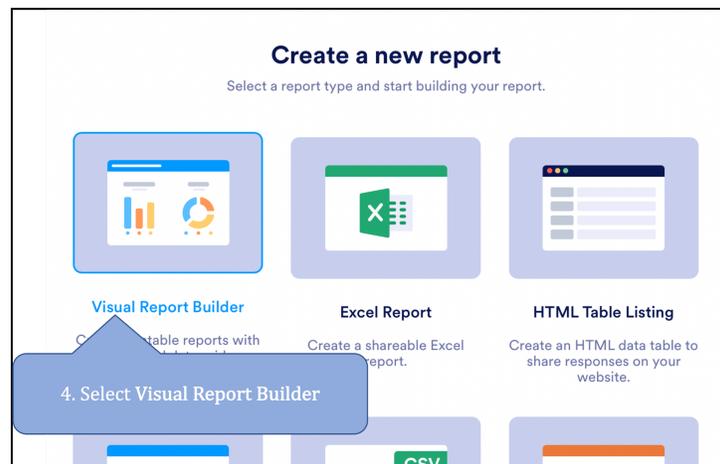
Step 1. Select **the survey you want to export**

Step 2. Select **Reports**

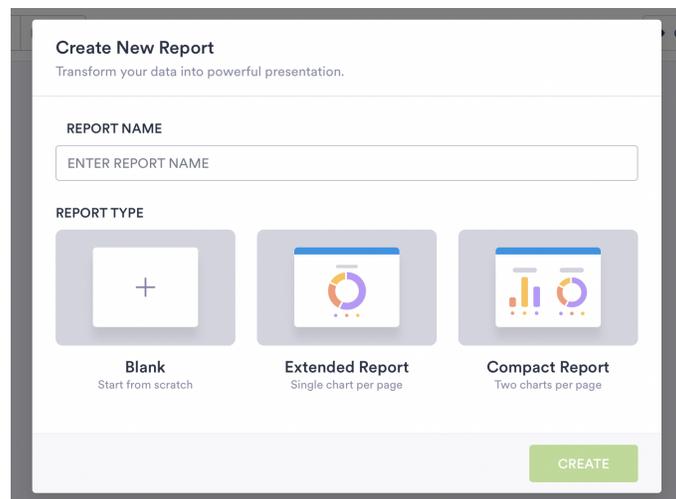
Step 3. Select **Add New Report**

Step 4. Select **Visual Report Builder**

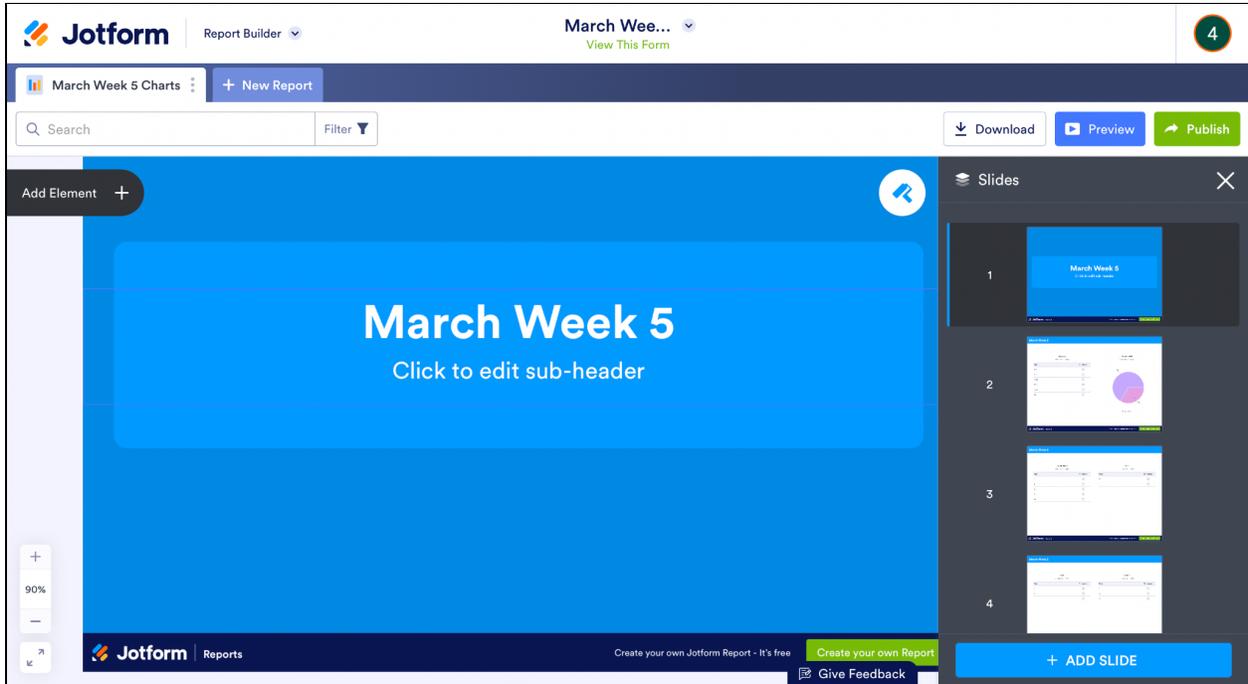
Step 5. Enter a report name, and click **Create**



Give the report a name and select the report type. An extended report contains one chart per slide, while a compact report contains two charts per slide.



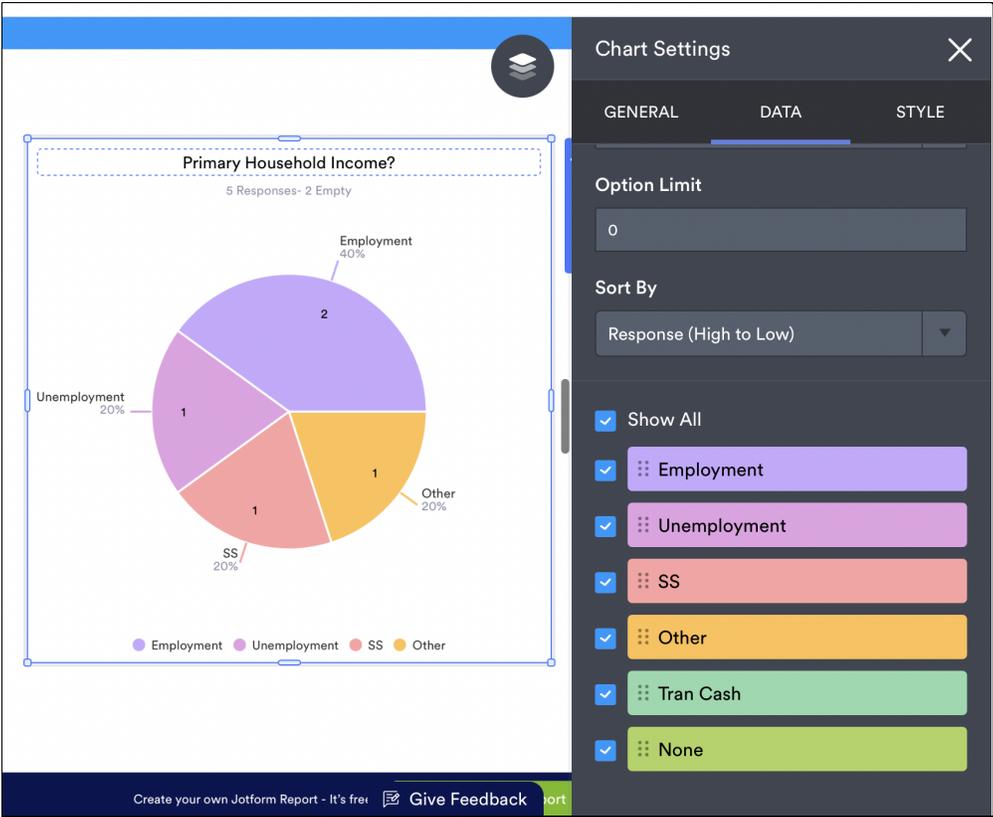
The screenshot shows the 'Create New Report' form with the subtitle 'Transform your data into powerful presentation.' It includes a text input field for 'REPORT NAME' with the placeholder 'ENTER REPORT NAME'. Below this, there are three report type options: 'Blank' (Start from scratch), 'Extended Report' (Single chart per page), and 'Compact Report' (Two charts per page). A green 'CREATE' button is located at the bottom right.



A slideshow containing charts and graphs will appear. You can rearrange the slide and add additional slides. The default chart type of each response varies, but you can easily change the chart type by hovering over the data element and selecting **Item Setting (Gear icon)**. A **Chart Settings** window should pop up on the right, allowing you to make changes.

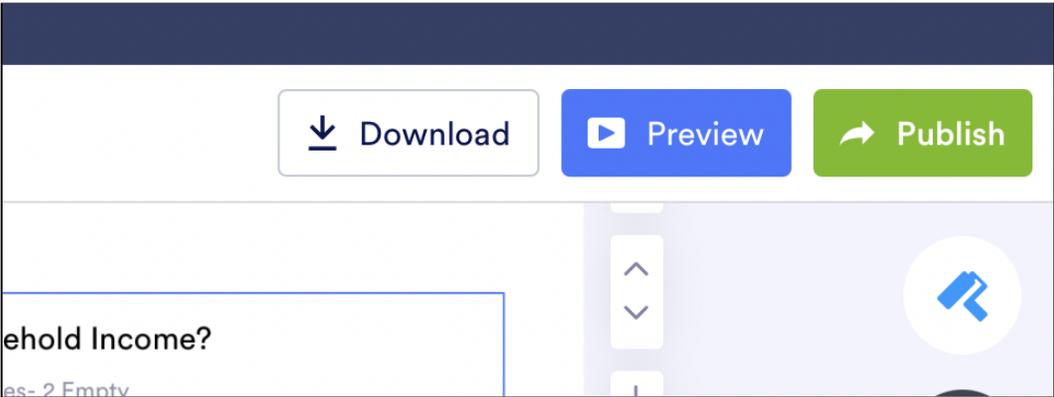


You can select colors for each sector, select fields to include in the chart, and customize how the chart looks.



Once you are done editing the charts, you can take screenshots of the charts or download the slides as a PDF:

- Download - Download slides as pdf
- Preview - Preview the slides in web browser
- Publish - Get a URL link to the published slides



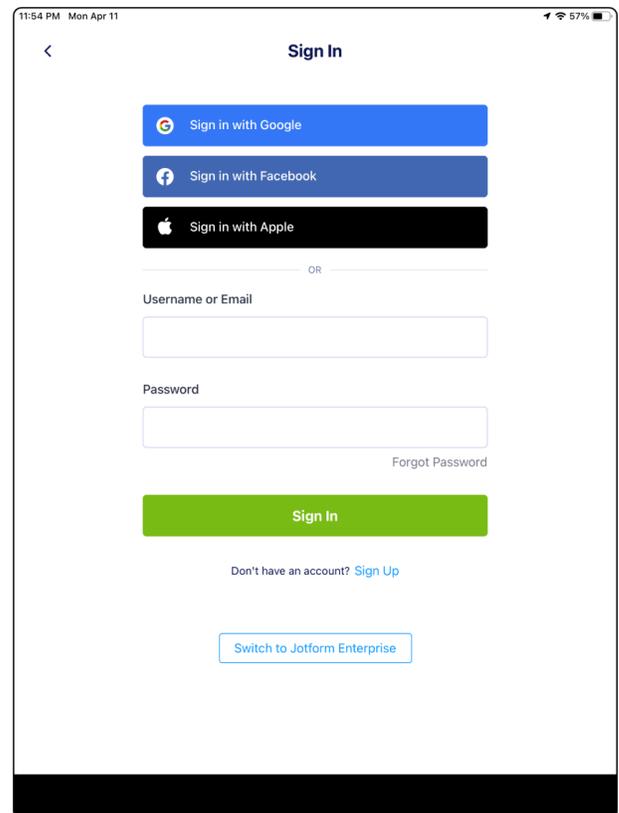
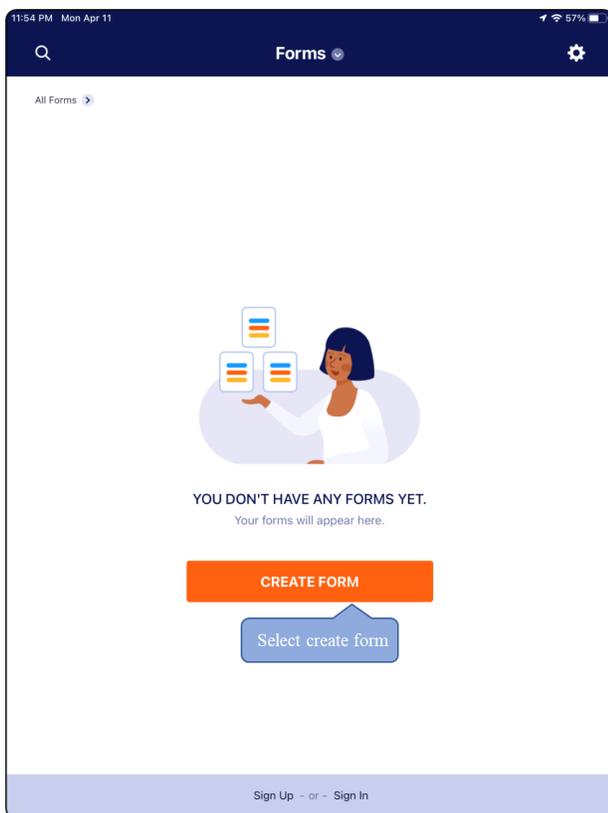
## 6. Using the App

### 6.1 Introduction

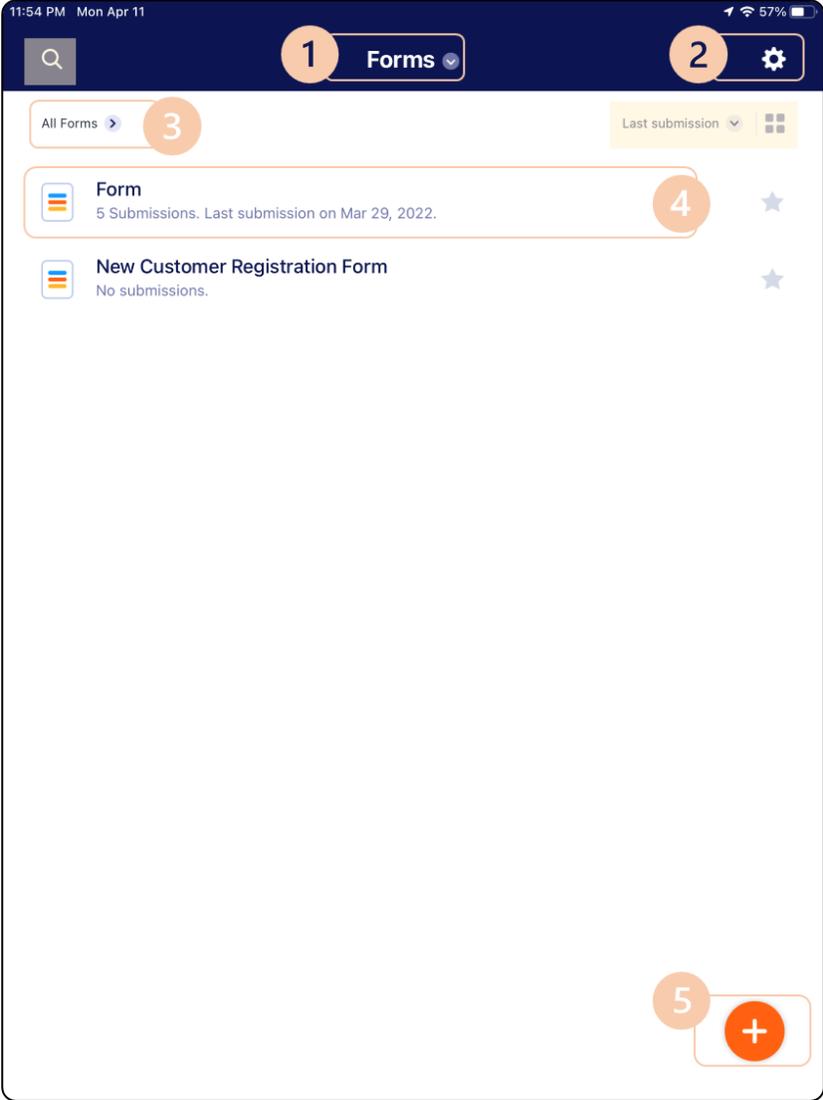
Jotform has its own app that is available on the Apple App Store or the Google Play Store. The app allows you to create, fill, and export surveys. We suggest that the app should mainly be used for filling and sharing survey data. Creating surveys is better in Jotform's web platform.

When you first download and install the Jotform app, you will need to sign into your Jotform account. This allows you to seamlessly work and share all information and data between different devices.

Open **Jotform App** > 1. Select **Create Form** > 2. Type Username/Password and select **Sign In**

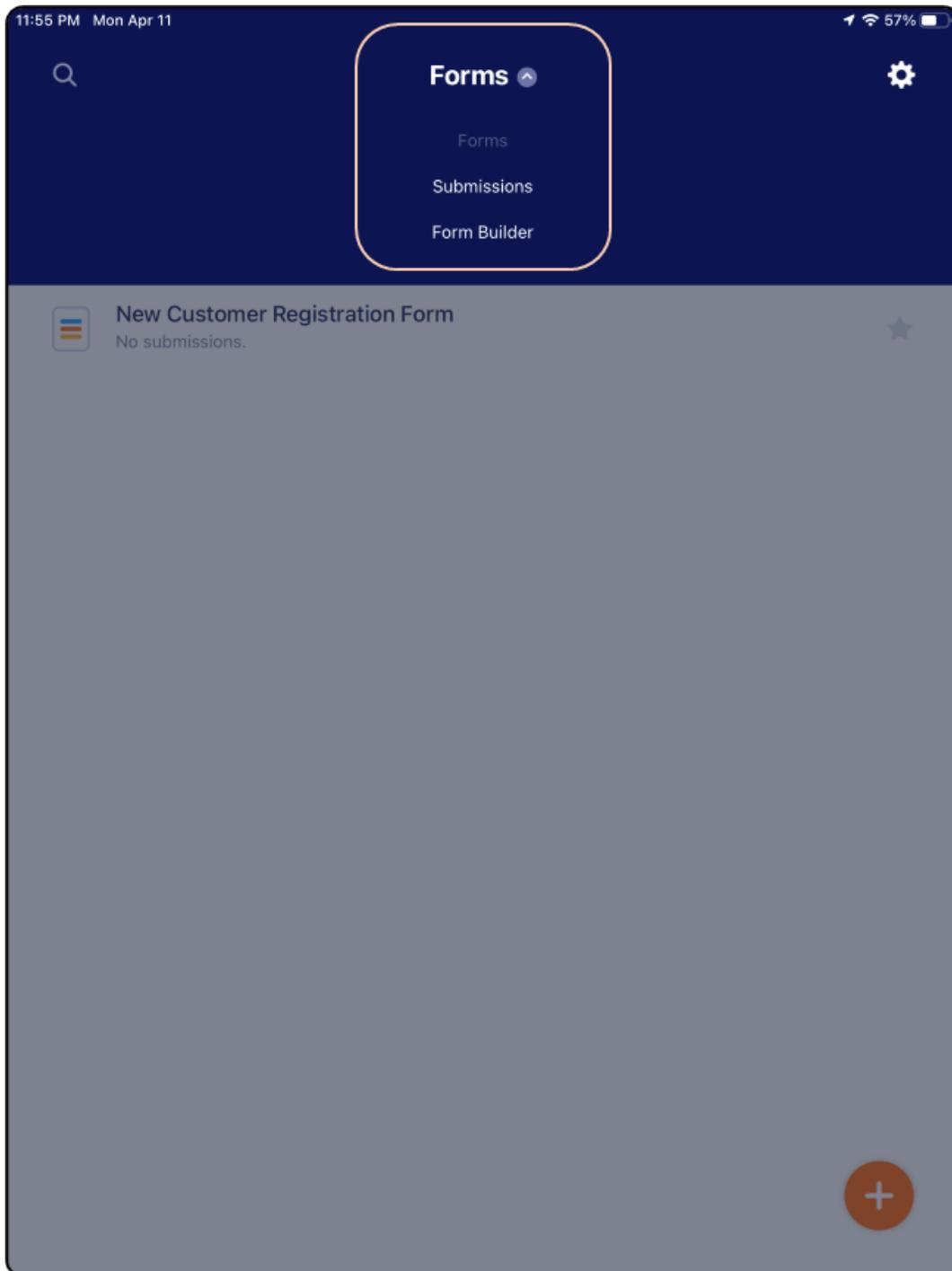


After logging in, you should now have access to all the surveys and data associated with your account. The app should now show you this.

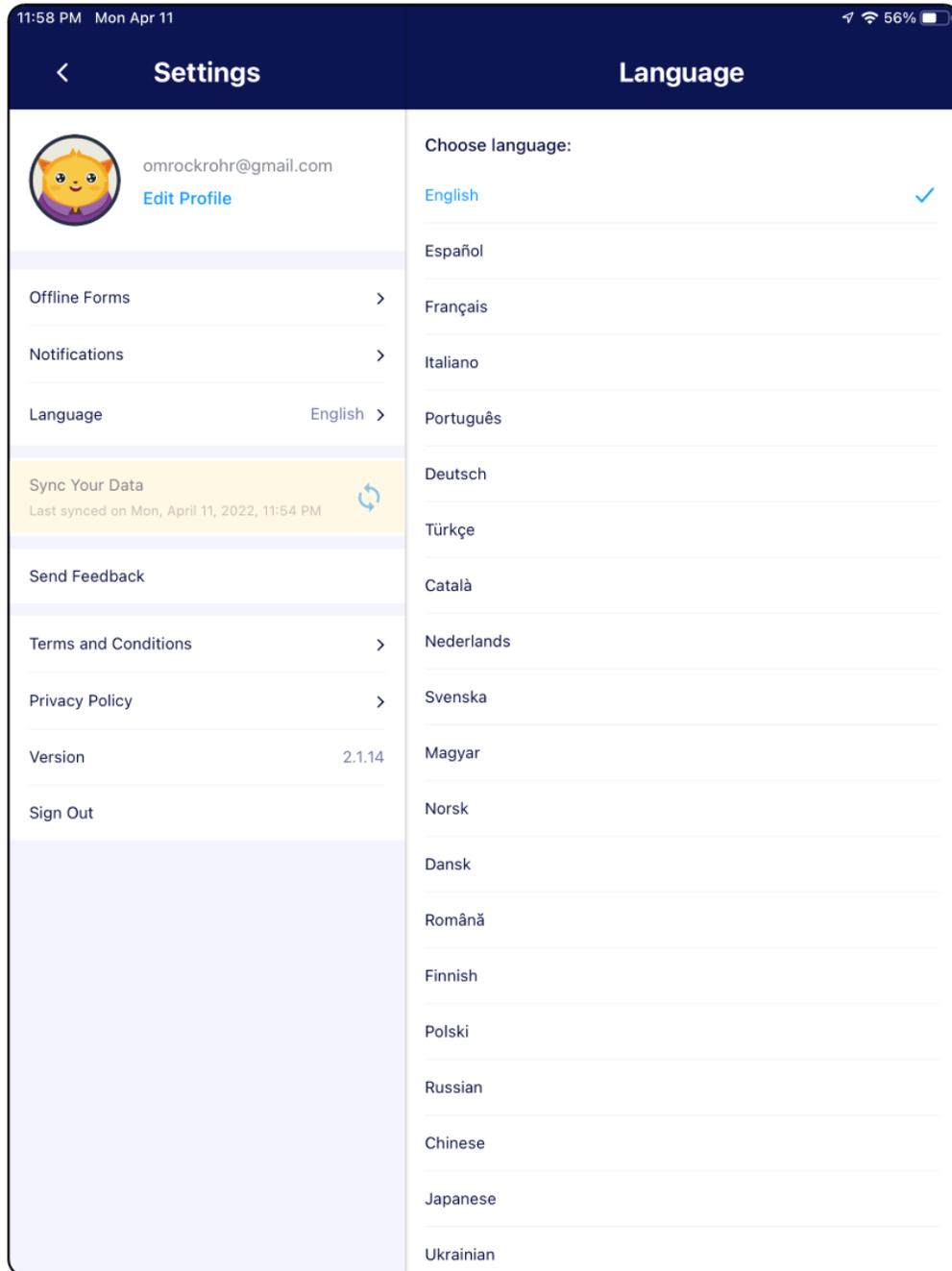


This is the homepage of the app. Indicated in the picture are various features that we will cover in this section. The things highlighted in yellow (late submission and search icon) are different ways to filter, view, search, and sort the forms homepage.

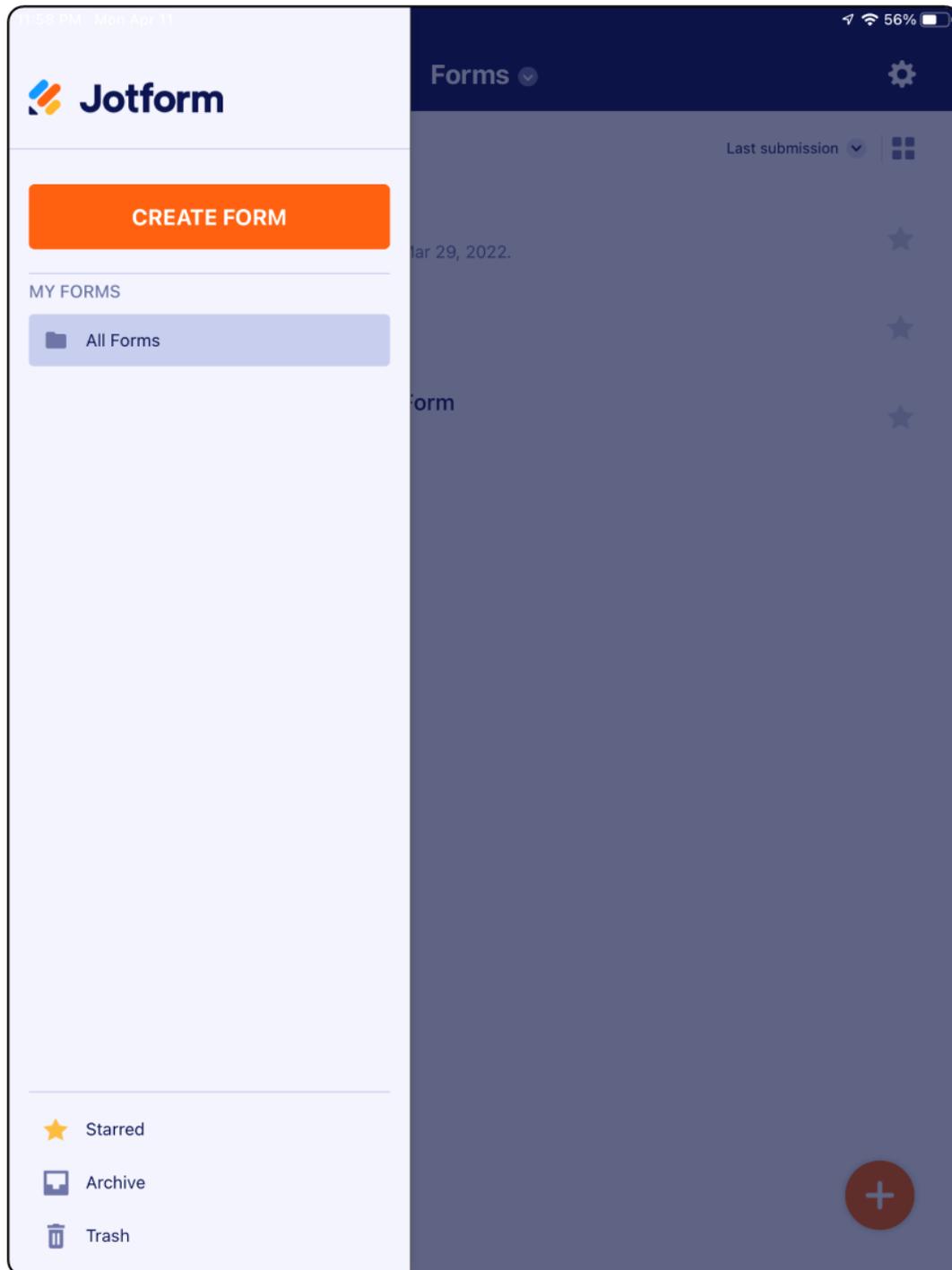
1. Mode Selection - Select **Forms** to select what mode you want. There are three modes: Forms, Submissions, and Form Builder. By default, you are in the Forms mode. We will go into more detail about Submissions and Form Builder in 6.2 and 6.3



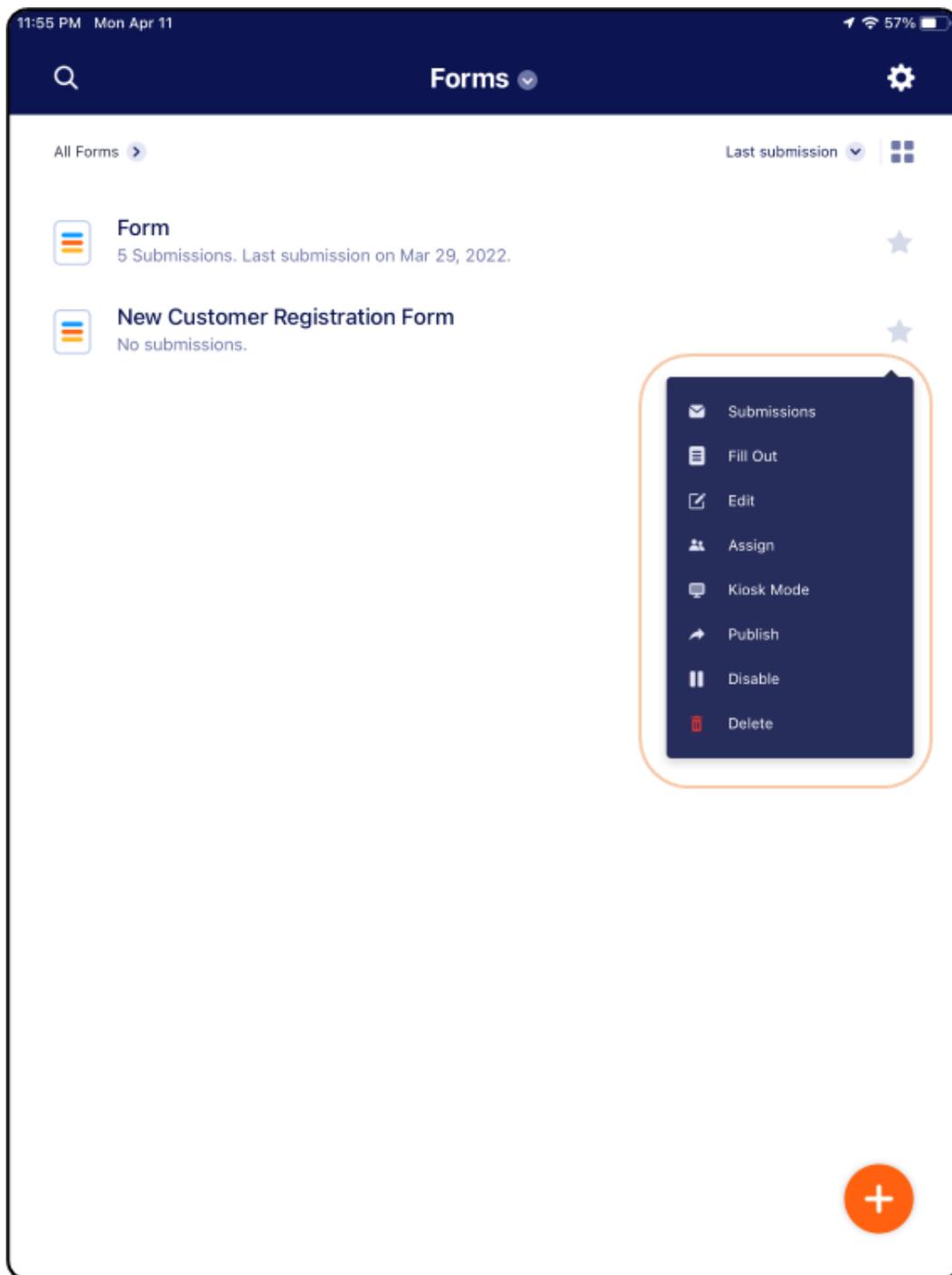
2. Profile and Settings - Select the **Gears Icon** to access your profile and app settings. Here you can control notifications, language, and offline forms. You will also find the terms and conditions and can sign out from this page. Sync Your Data, highlighted in yellow, is very important when filling forms offline. Once connected to the internet again, click this button to update and sync all your data so that you can access it on a desktop computer.



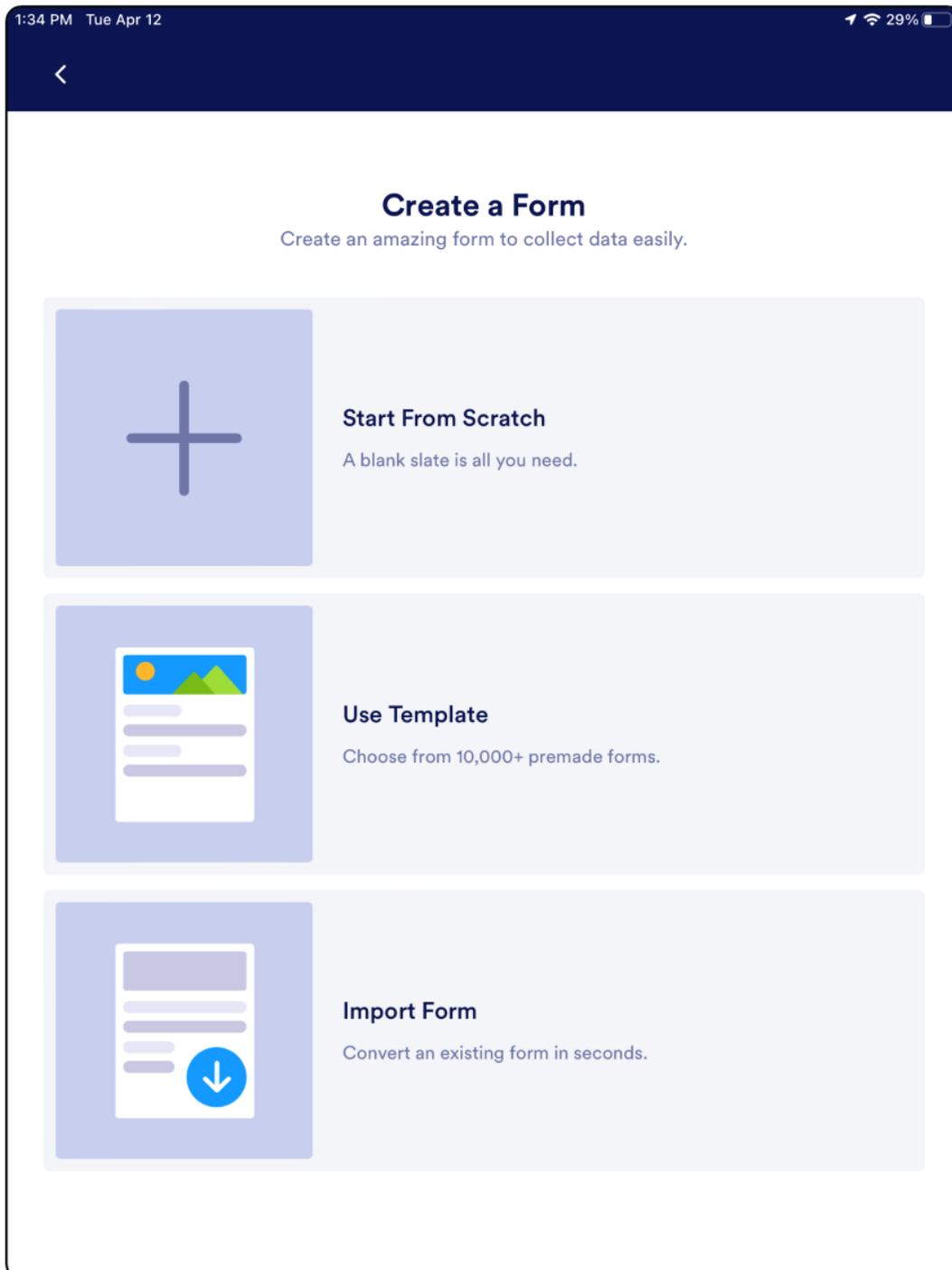
3. All Forms List - Select **All Forms** to see a list of all forms that you have created, starred, archived, and trashed. By default you will start with one folder called All Forms. You can make new folders to organize and sort the surveys that you create. Thus you will also see all the folders you have created and can navigate and sort your surveys with these folders.



4. Form Settings - Select **anywhere over the form name** to open a menu for that specific form. This menu allows you to see the submissions, fill out the form, edit, etc.



5. Create Form - Select the **Red plus Icon** to create a new form. This process is very similar to the web platform in section 3. You can also create a new survey by selecting form builder under forms or going to all forms list and selecting create new form. Once you see the menu for creating a form, follow the instructions in section 3.



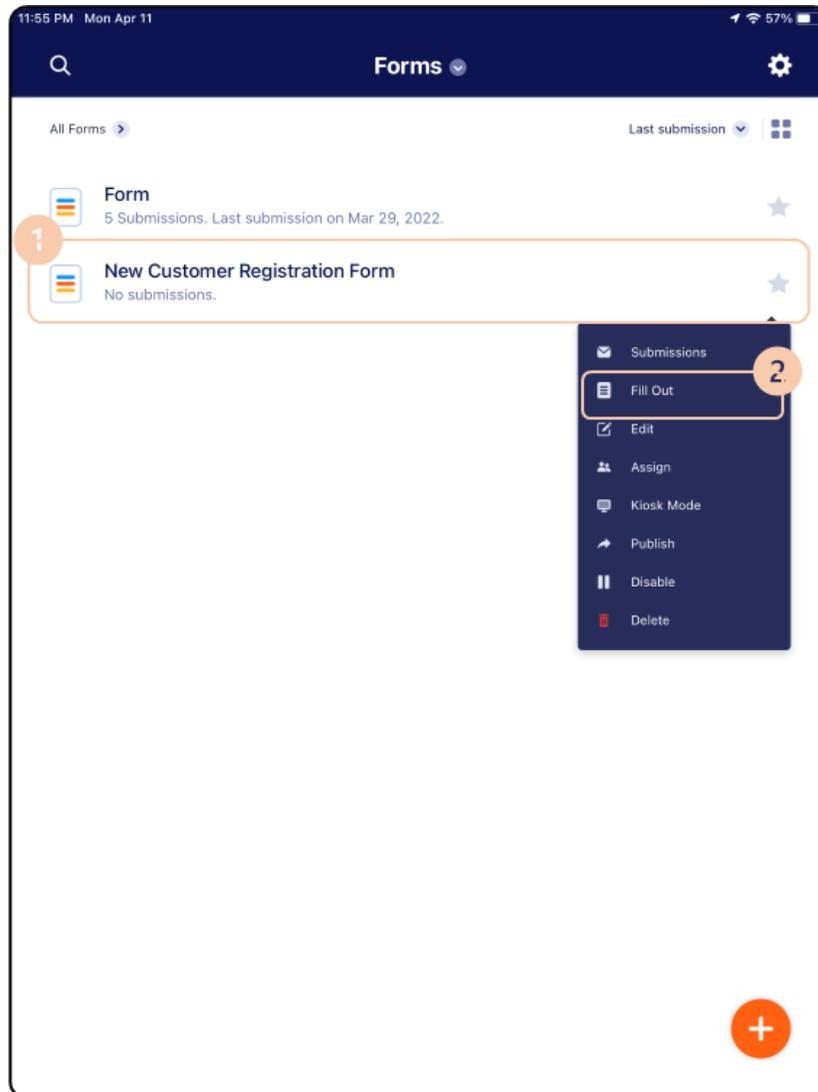
\*If filling surveys offline, without internet, the data will only be saved locally on the device. You must connect the device to the internet, once available to sync and upload that data to your account and have access to it across all your devices.

## 6.2 Filling out surveys (Kiosk mode)

This is the main feature that will be utilized the most from the Jotform app. You must have a survey created before being able to fill it out. Once you create a survey it should appear on the homepage as shown in section 6.1.

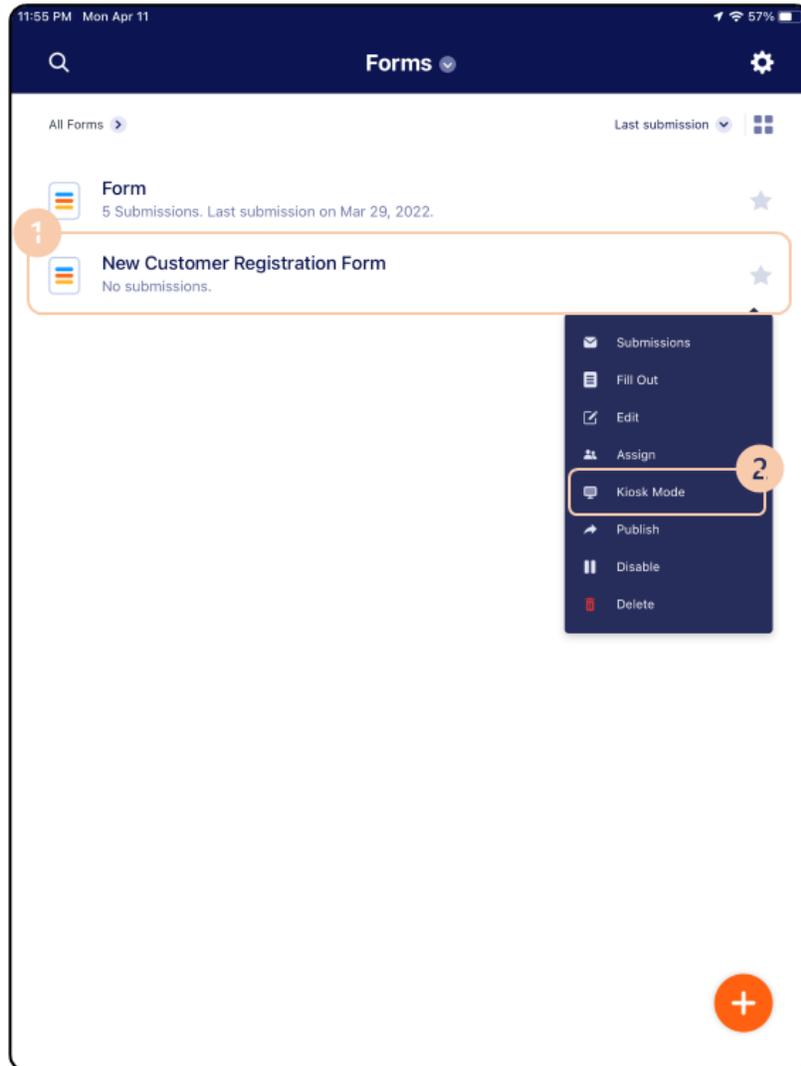
Fill Out, One Time Submission: only allows one submission for a survey per time

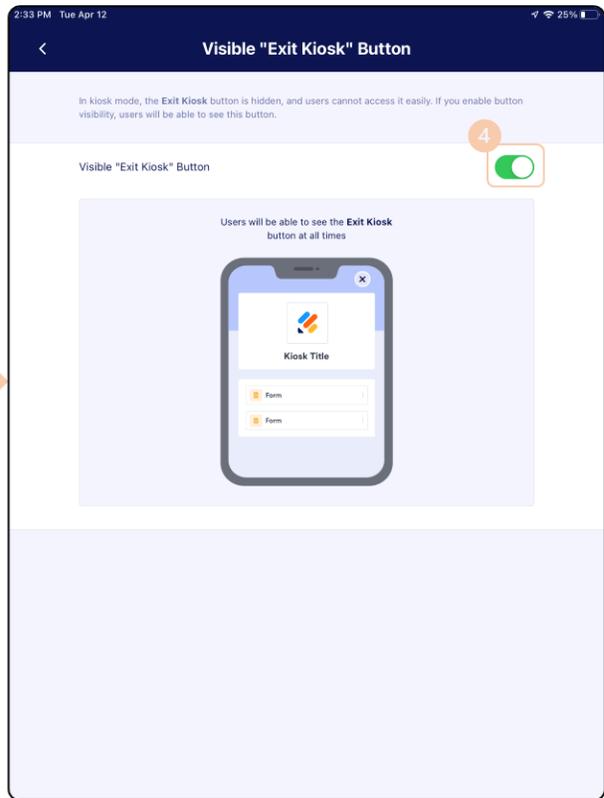
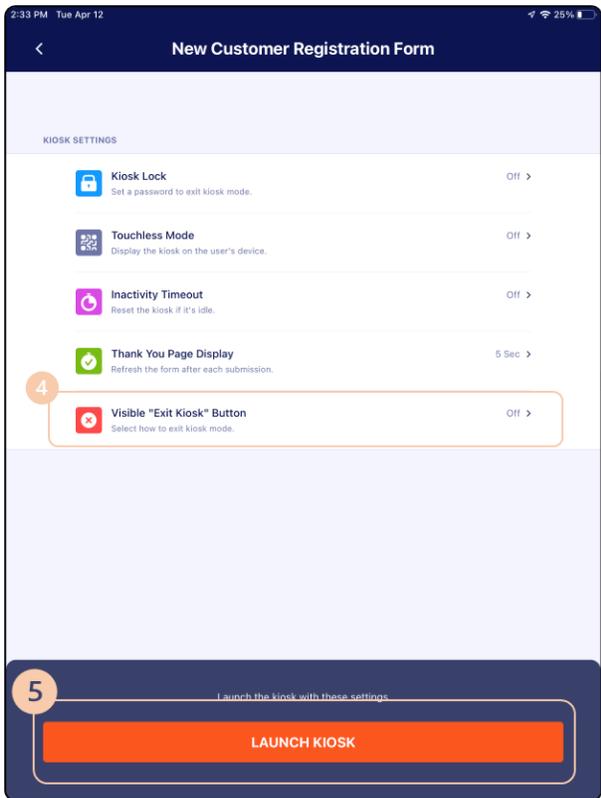
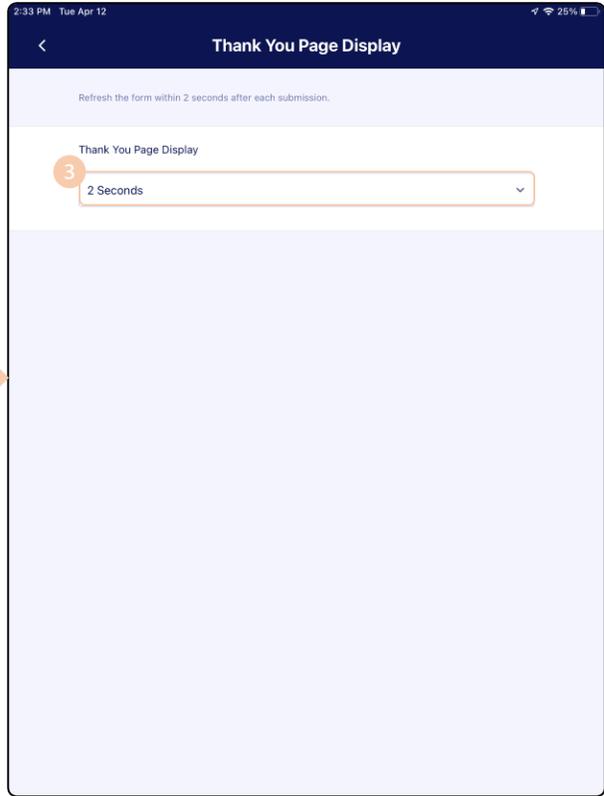
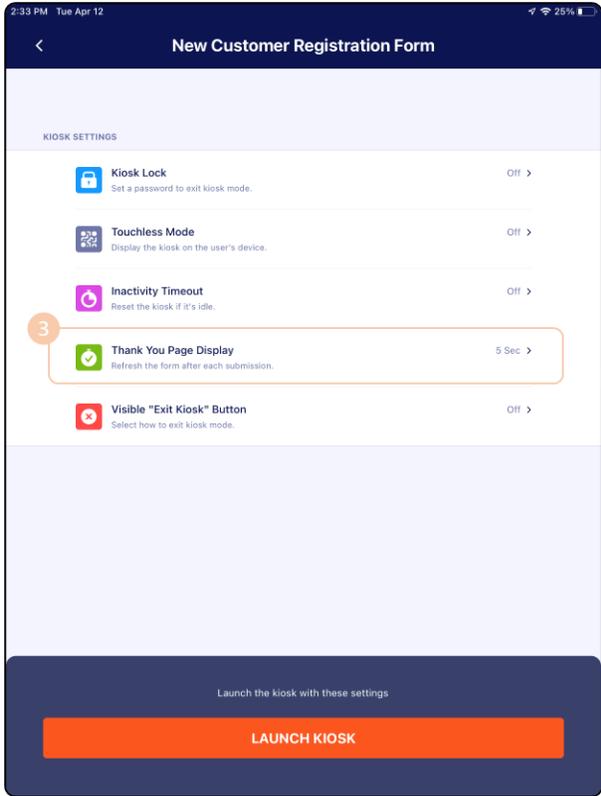
Go to **Home Page (Forms)** > 1. Select **Anywhere on the Survey name** > 2. Select **Fill Out**



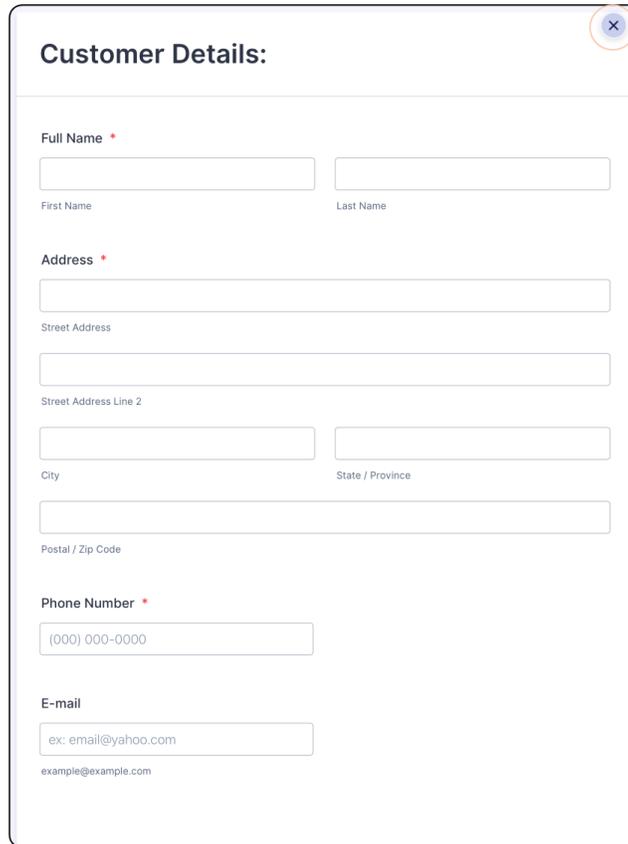
Kiosk Mode, multiple submissions: allows multiple submissions for a survey by refreshing automatically

Go to **Home Page (Forms)** > 1. Select **Anywhere on the Survey name** > 2. Select **Kiosk Mode** > 3. Select **Thank You Page Display** and set for 2 Seconds > 4. Click the back arrow and Select **Visible “Exit Kiosk” Button** and toggle it on > 5. Select **Launch Kiosk**





You will now be able to fill out your survey and submit multiple times as it refreshes automatically. To exit kiosk mode, click **the x icon**



The image shows a 'Customer Details' form with a close button (x icon) in the top right corner. The form contains the following fields:

- Full Name \***: Two input fields for 'First Name' and 'Last Name'.
- Address \***: Three input fields for 'Street Address', 'Street Address Line 2', and 'Postal / Zip Code'.
- City**: One input field.
- State / Province**: One input field.
- Phone Number \***: One input field with a placeholder '(000) 000-0000'.
- E-mail**: One input field with a placeholder 'ex: email@yahoo.com' and an example 'example@example.com' below it.

### 6.3 Viewing Submissions

After filling out a survey, you will be able to see the submissions for that survey. You can view submissions two ways:

Viewing all Submissions: This allows you to see all submissions for all surveys in a list view

Go to **Home Page (Forms)** > 1. Select **Forms** > 2. Select **Submissions**

Viewing Submissions for one Survey: This allows you to see only the submissions for the selected survey

Go to **Home Page (Forms)** > 1. Select **Anywhere on the Survey name** > 2. Select **Submissions**

You can select each individual submission to edit, delete, or share it.

## 7. Formatting Data in Excel Spreadsheet

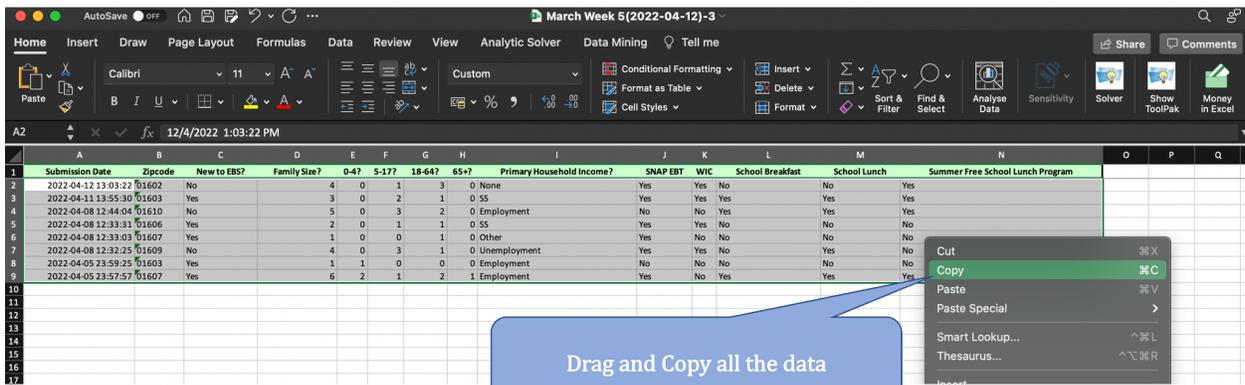
To put the exported data into the format of the WCFB portal:

**Important note: We recommend that you save an empty version of the template, and only duplicate the template when filling in data for a new month!**

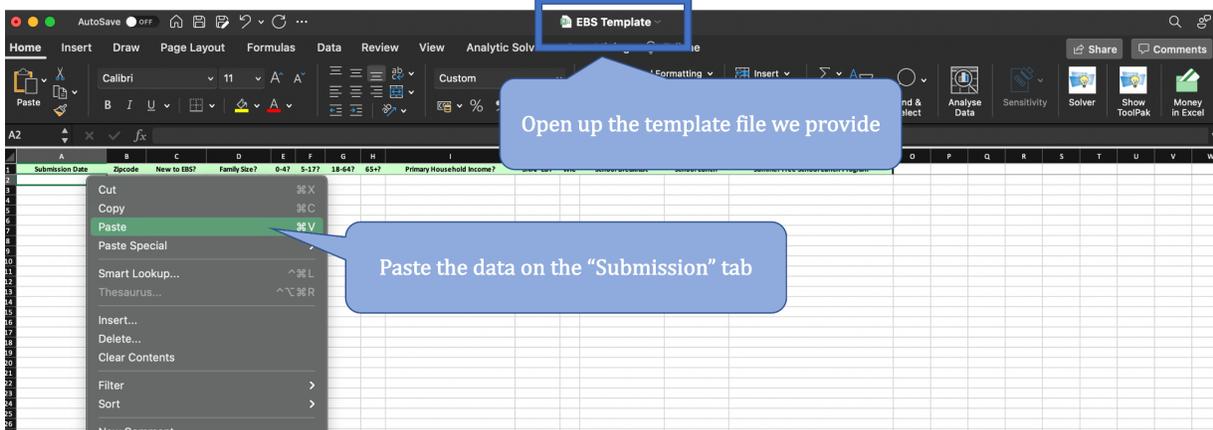
Have two files ready:

- (1) Excel file exported from Jotform
- (2) Template file that we provided, contains two tab: “Submission” and “Report”

1. Open the **downloaded excel file**, drag and copy all the data



2. Open the **template file** we provided, paste all the data onto the “Submission” tab



3. The **template file** should now look like this, with all the data from the survey

| Submission Date | Zipcode | New to EB5? | Family Size? | 0-4? | 5-17? | 18-64? | 65+? | Primary Household Income? | SNAP EBT     | WIC | School Breakfast | School Lunch | Summer Free School Lunch Program |     |
|-----------------|---------|-------------|--------------|------|-------|--------|------|---------------------------|--------------|-----|------------------|--------------|----------------------------------|-----|
| 12/4/2022 11:03 | 1602    | No          |              | 4    | 0     | 1      | 3    | 0                         | None         | Yes | Yes              | No           | No                               | Yes |
| 12/4/2022 11:55 | 1603    | Yes         |              | 3    | 0     | 2      | 1    | 0                         | SS           | Yes | Yes              | Yes          | Yes                              | Yes |
| 8/4/2022 12:44  | 1610    | No          |              | 5    | 0     | 3      | 2    | 0                         | Employment   | No  | No               | Yes          | Yes                              | Yes |
| 8/4/2022 12:33  | 1606    | Yes         |              | 2    | 0     | 1      | 1    | 0                         | SS           | Yes | Yes              | No           | No                               | No  |
| 8/4/2022 12:33  | 1607    | Yes         |              | 1    | 0     | 0      | 1    | 0                         | Other        | Yes | No               | No           | No                               | No  |
| 8/4/2022 12:32  | 1609    | No          |              | 4    | 0     | 3      | 1    | 0                         | Unemployment | Yes | Yes              | No           | Yes                              | No  |
| 5/4/2022 23:59  | 1603    | Yes         |              | 1    | 1     | 0      | 0    | 0                         | Employment   | No  | No               | No           | No                               | No  |
| 5/4/2022 23:57  | 1607    | Yes         |              | 6    | 2     | 1      | 2    | 1                         | Employment   | Yes | No               | Yes          | Yes                              | Yes |

4. Navigate to the “Report” tab on the **template file**, you should now see all the data formatted!

| DCS Report | Month: | Year: | Total HH | Total People | 0 to 4 | 5 to 17 | 18 to 64 | 65 & over | Emp | Unemp | SS | TANF | Other | None | SNAP | WIC | Breakfast | Lunch | SPSP |   |
|------------|--------|-------|----------|--------------|--------|---------|----------|-----------|-----|-------|----|------|-------|------|------|-----|-----------|-------|------|---|
| 01602      | 0      | 0     | 1        | 4            | 0      | 1       | 3        | 0         | 0   | 0     | 0  | 0    | 0     | 0    | 1    | 1   | 1         | 0     | 0    | 1 |
| 01603      | 2      | 4     | 2        | 4            | 1      | 2       | 1        | 0         | 1   | 0     | 0  | 0    | 0     | 0    | 1    | 1   | 1         | 1     | 1    | 1 |
| 01606      | 1      | 2     | 1        | 2            | 0      | 1       | 1        | 0         | 0   | 0     | 0  | 1    | 0     | 0    | 0    | 1   | 1         | 0     | 0    | 0 |
| 01607      | 2      | 7     | 2        | 7            | 2      | 1       | 3        | 1         | 1   | 0     | 0  | 0    | 0     | 1    | 0    | 2   | 0         | 1     | 1    | 1 |
| 01609      | 0      | 0     | 1        | 4            | 0      | 3       | 1        | 0         | 0   | 1     | 0  | 0    | 0     | 0    | 0    | 1   | 1         | 0     | 1    | 0 |
| 01610      | 0      | 0     | 1        | 5            | 0      | 3       | 2        | 0         | 1   | 0     | 0  | 0    | 0     | 0    | 0    | 0   | 0         | 1     | 1    | 1 |
| Summary    | 5      | 13    | 8        | 26           | 3      | 11      | 11       | 1         | 3   | 1     | 2  | 0    | 1     | 1    | 6    | 4   | 3         | 4     | 4    | 4 |

You can now fill out the Worcester County Food Bank according to this table.