



HOW TO EXPORT DATA FROM MICROSOFT FORMS INTO WORD

For Communication Briefs, 2024

This guide will walk you through the process of exporting data from a Microsoft Forms questionnaire into a Word document using the Mail Merge function. This is useful for creating communication briefs to share with designers or team members. Images have been referenced throughout the guide to assist you visually.

Table of contents

For quick reference, click on any section below to navigate directly to that page:

1. Accessing Microsoft Forms	1	6. Linking the Excel Data Source in Word	6
2. Sharing the Form with Respondents	2	7. Previewing Data	7
3. Viewing and Managing Responses	3	8. Exporting Individual Documents	7
4. Exporting Responses to Excel	4	9. Handling File Attachments	8
5. Preparing the Word Template for Mail Merge	5	10. Cleaning Up the Document for Designers	10
5.1 First-Time Users or Missing Data Source	5	11. Sending the Document to the Comms Team	10

1. Accessing Microsoft Forms

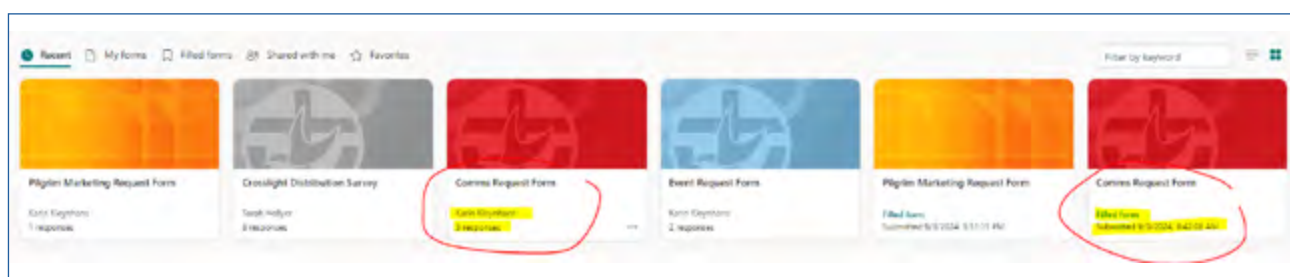
Step 1: Open your web browser and navigate to [Microsoft Forms](#).

Step 2: Sign in using your organisational account if prompted.

Step 3: On your dashboard, you may see two types of forms:

Owned Forms: These have your name and a response count (e.g., “John Doe - 5 responses”).

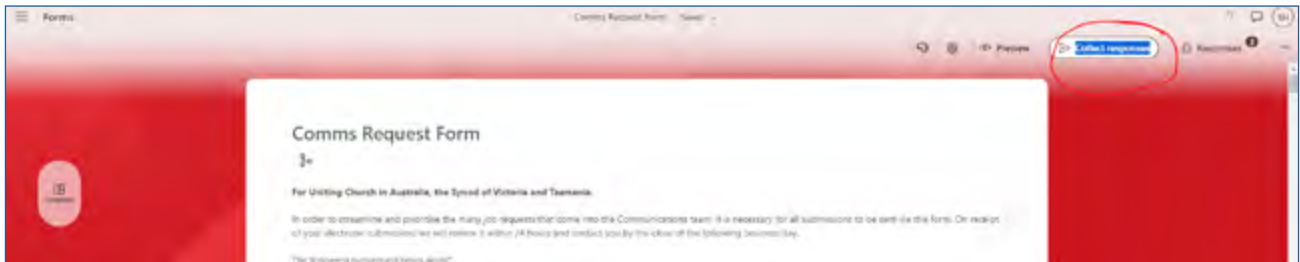
Submitted Forms: These show forms you’ve filled out.



2. Sharing the Form with Respondents

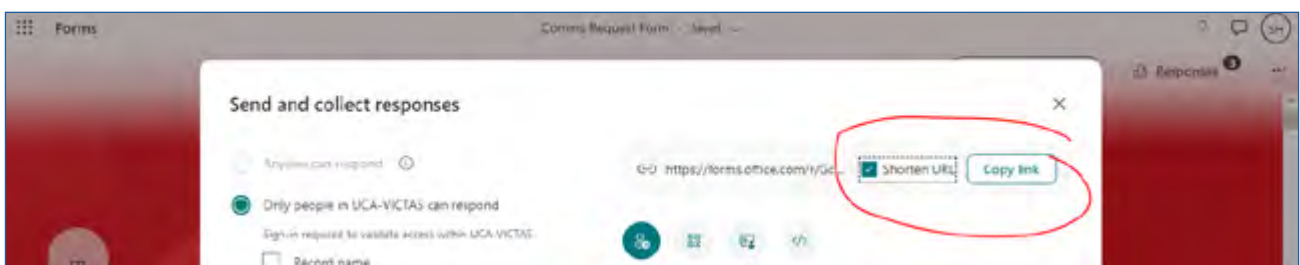
Step 1: Click on the form you wish to share.

Step 2: Click on the **“Collect Responses”** button.



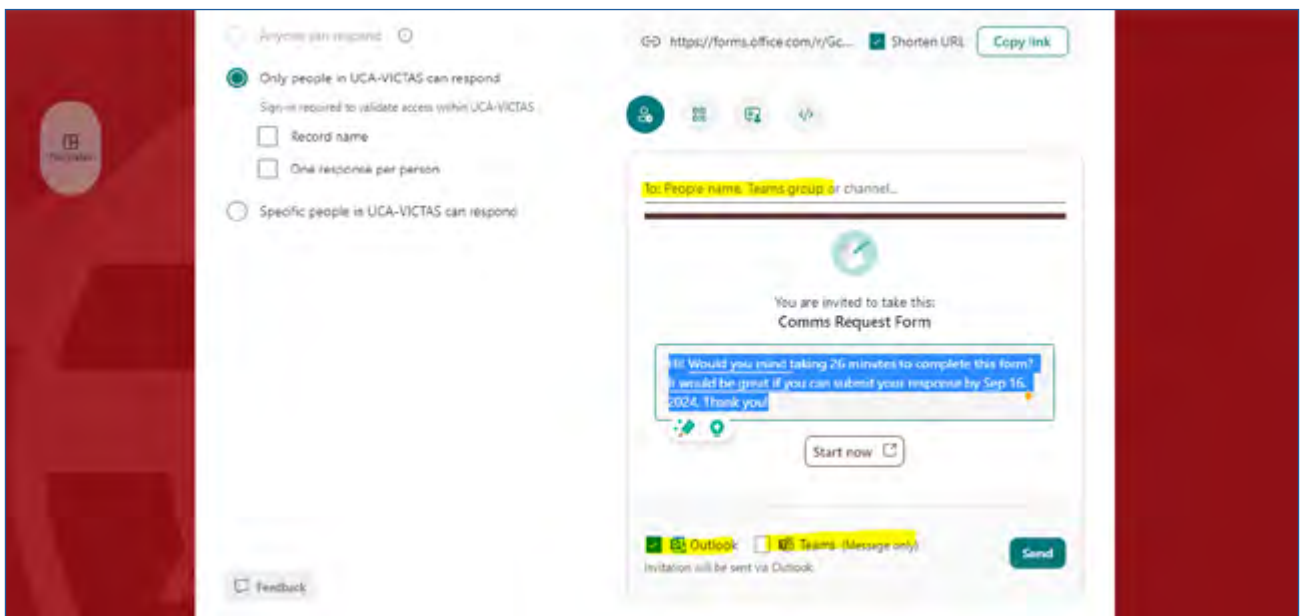
Step 3: In the sharing options click **“Copy”** to copy the link

Optionally: Check the **“Shorten URL”** box to create a shorter link.



Step 4: Paste this link into an email or messaging platform to send to your respondents.

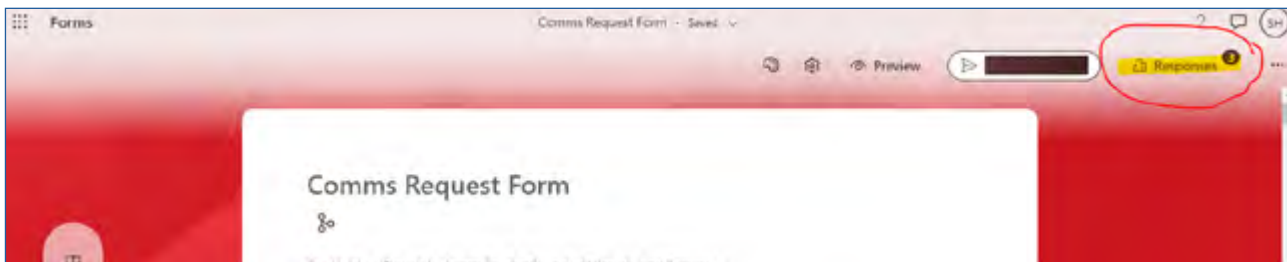
You can also share this link within the MS Forms **‘collect response’** window. Be sure to change the greeting message before sending.



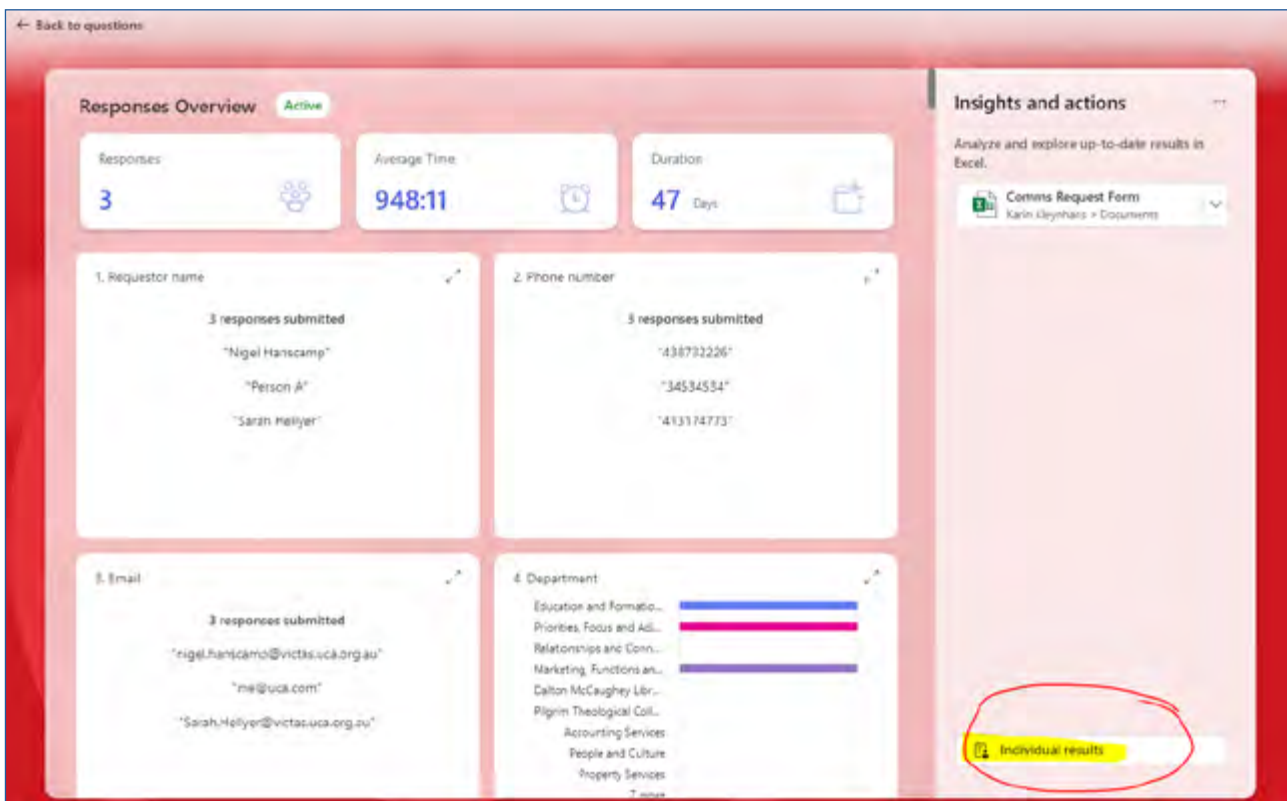
You can watch a [video tutorial here](#)

3. Viewing and Managing Responses

Step 1: To view responses, click on the “Responses” tab within your form.

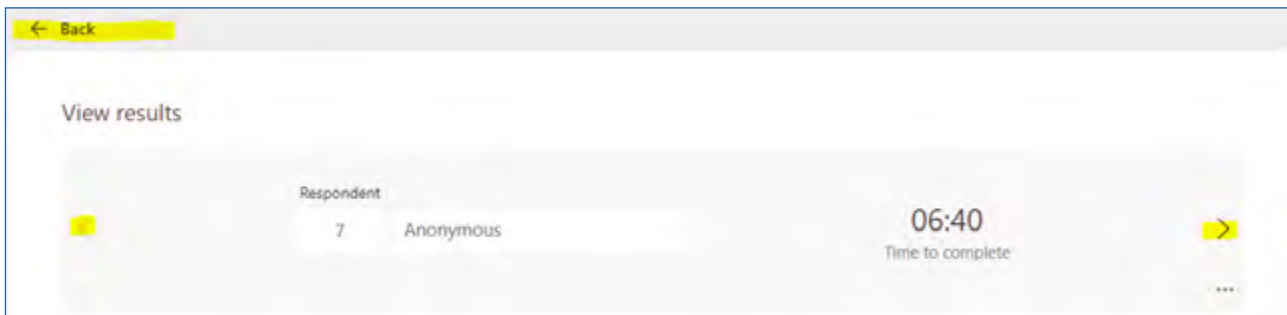


Step 2: You can view the summary data here. However, for a more detailed individual analysis, it's best to review responses by clicking the “Individual Results” button at the bottom right, as the summary data homepage is better suited for overall survey analysis.



Step 3: In this section, you can review each answer online by clicking the arrow buttons above.

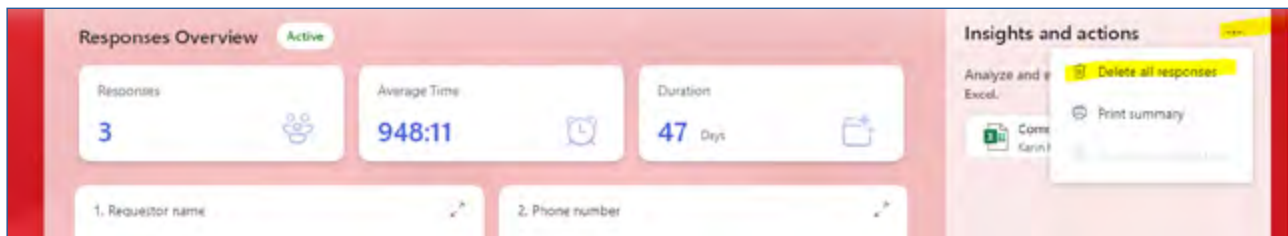
To go back to the response tab, click “back” at the top left of the webpage



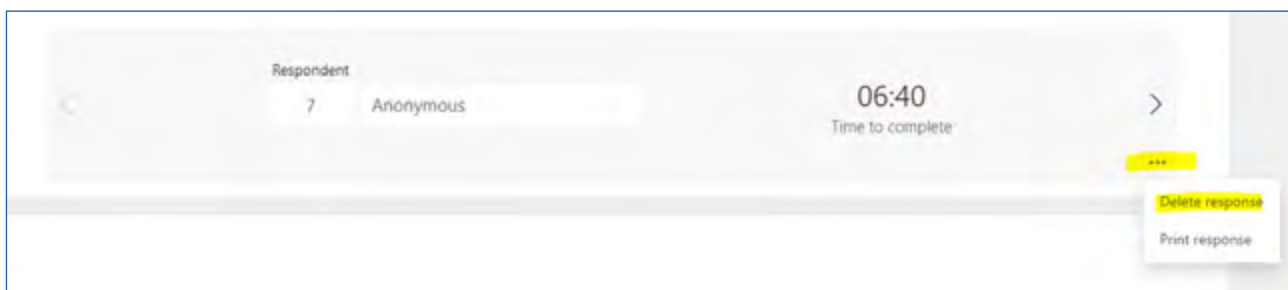
Note: To manage storage and keep things organised, consider deleting responses after processing them:

- Click on **“Responses”**.
- Click on the **“...”** (More options) button.
- Select **“Delete all responses”**.

Please note that this will remove **all responses** but not the file attachments so files will still be on your onedrive.



To delete an individual response from the form, go to the **“Individual Results”** tab, select the response you want to remove, and click the **“...”** (More options) button. Then, choose **“Delete response.”**



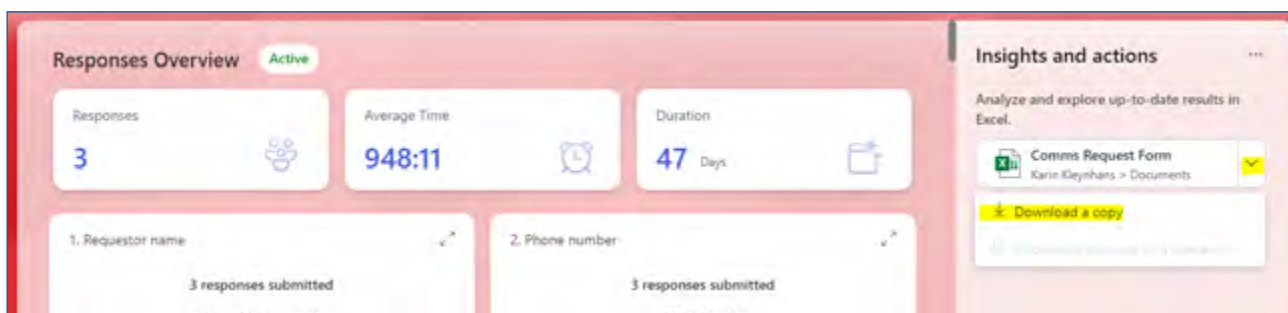
You can watch a [video tutorial here](#) (video pending)

4. Exporting Responses to Excel

To use the data for your communication brief, download the responses as an Excel file.

To download the file:

Step 1: In the **“Responses”** tab, click on the arrow next to Excel sheet icon, and select **“Download a copy”** from the dropdown menu.



Step 2: Save the Excel file to a **dedicated folder**. It's helpful to rename the file with the date for easy reference (e.g., “Responses_Sept6_2024.xlsx”).

Note: This action will download **all response** so if you have not remove reponses already gathered then you will need to keep an eye on any old response when processing the data.

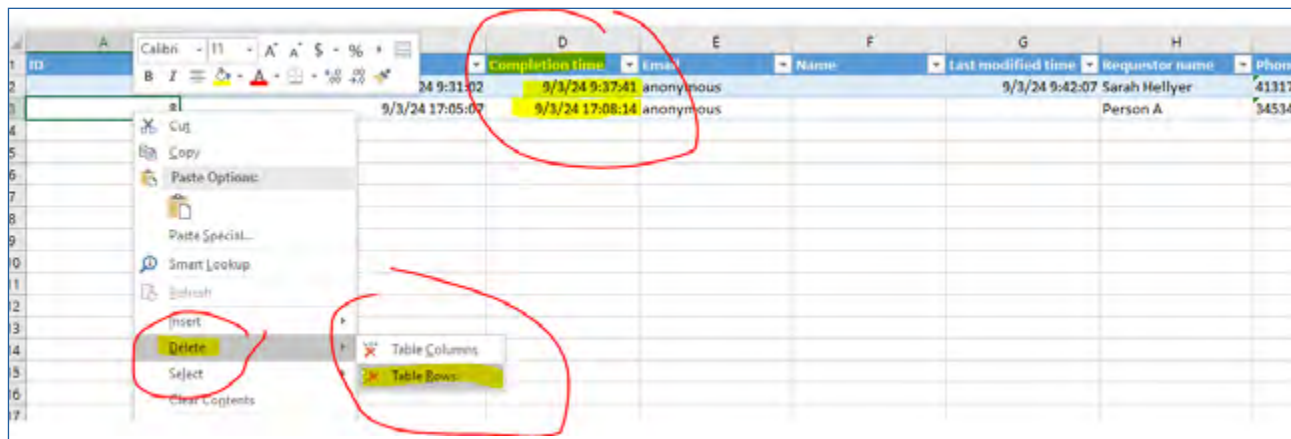
You can quickly review old responses in the excel sheet by:

“Open” the Excel file.

Review the responses completion column date to ensure they are new and haven't been processed before.

Right click on the row you wish to delete and choose **“Delete”**, then **“Table Rows”**

“Save” the excel sheet before moving to the next step.



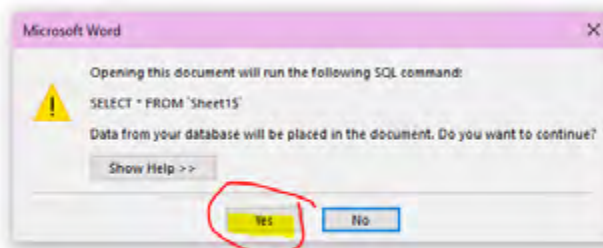
For first time users, please save your excel sheet in the same folder as the communication request form.

You can watch a [video tutorial here](#) (video pending)

5. Preparing the Word Template for Mail Merge

Step 1: Open the Word template provided. (e.g., Communication Brief 2024)

Note: Upon opening, you might see a message about running an SQL command. Click **“Yes”** to proceed.

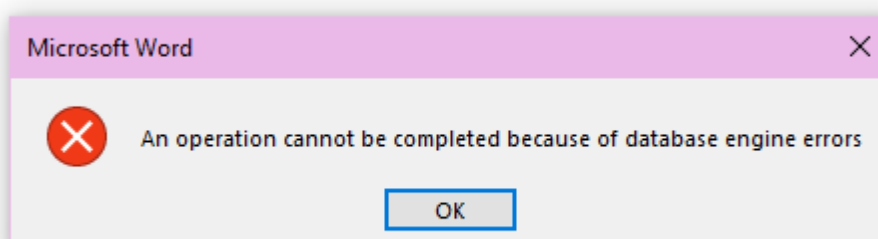


If an error pops up then please proceed to step 5.1

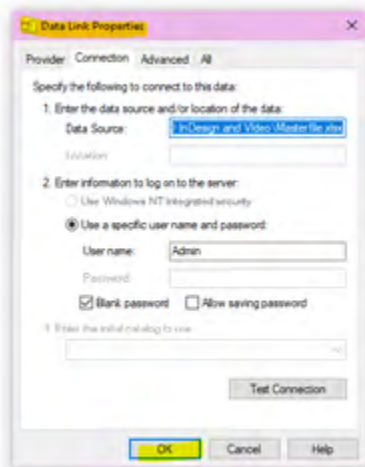
5.1 First-Time Users or Missing Data Source

If you receive errors about missing data sources, don't worry—we'll fix that in the next steps. This will only happen the first time using this file, so you won't need to do this every time.

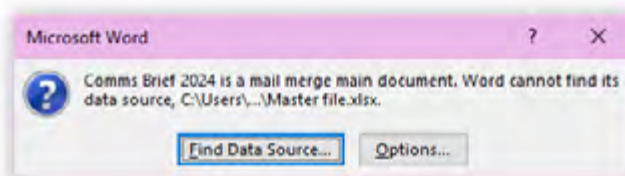
If Word cannot find the data source, you'll need to relink it. If this occurs a new window will come up with an operation cannot... to proceed click **“OK”**



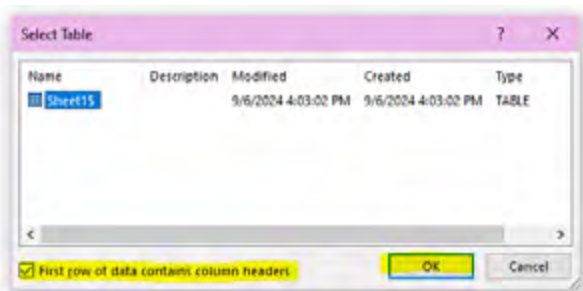
A new window will prompt up call **Data Link Properties**, click **“OK”** to proceed



When prompted, click **“Find Data Source”**.



This will now open your windows explorer. Navigate to the Excel file that you recently downloaded in **step 4**, and select **“Open”**. Once opened you will be prompted to select a table, Select **“OK”** with *first row of data contains columns headers* is ticked.



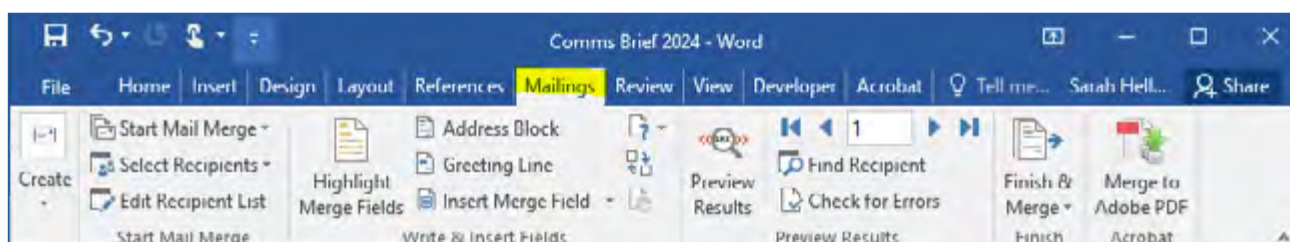
After completing these steps, please make sure to **save** the Communication Brief Word file and ensure that the linked Excel sheet is not deleted or moved to a different location on the computer to avoid having to repeat this process.

You can watch a [video tutorial here](#) (video pending)

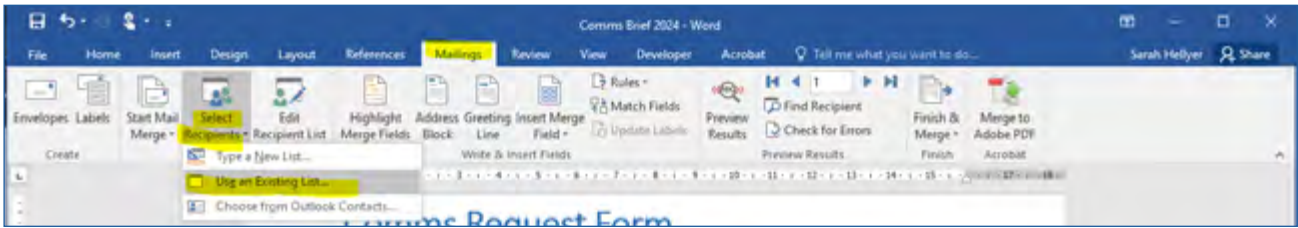
6. Linking the Excel Data Source in Word

You will use Mail Merge in Word to import the data from Excel into your communication brief template.

Step 1: In Word, go to the **“Mailings”** tab on the ribbon.

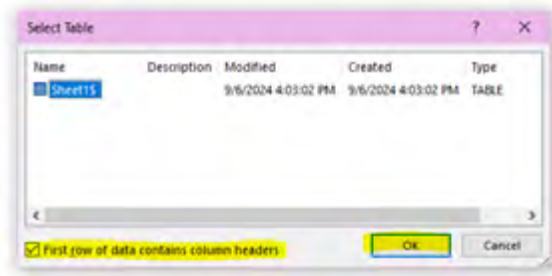


Step 2: Click on **“Select Recipients”** and choose **“Use an Existing List...”**.



Step 3: Navigate to the Excel file you saved earlier and select it.

Step 4: When prompted, select the appropriate table (usually “Sheet1\$”) and click **“OK”**.

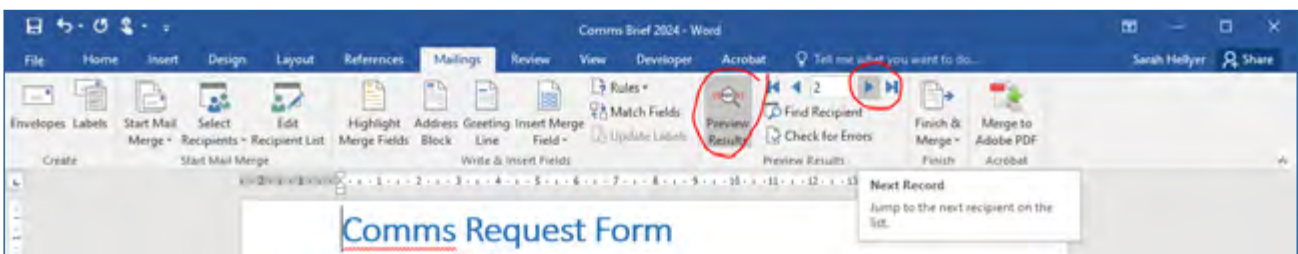


7. Previewing Data

To see how your data appears in the template:

Step 1: Still in the **“Mailings”** tab, click on **“Preview Results”** to see how the data merges into your document.

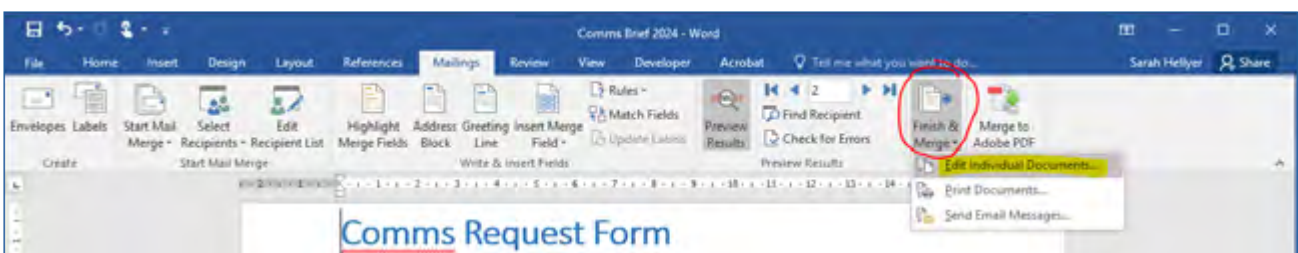
Step 2: Use the navigation arrows to cycle through different records if you have multiple responses.



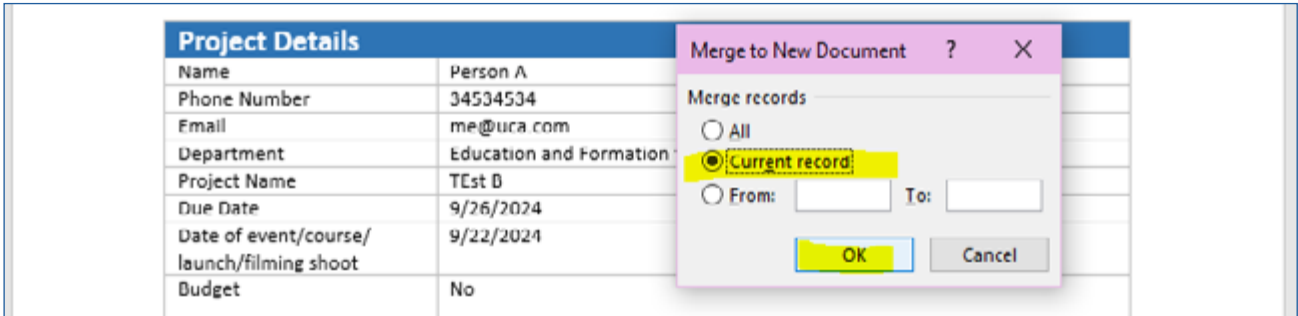
8. Exporting Individual Documents

To create individual documents for each response for the communication brief follow the following steps:

Step 1: With the desired record displayed, click on **“Finish & Merge”** in the Mailings tab and select **“Edit Individual Documents”**.



Step 2: In the dialog box, choose **“Current Record”** to export only the displayed response.



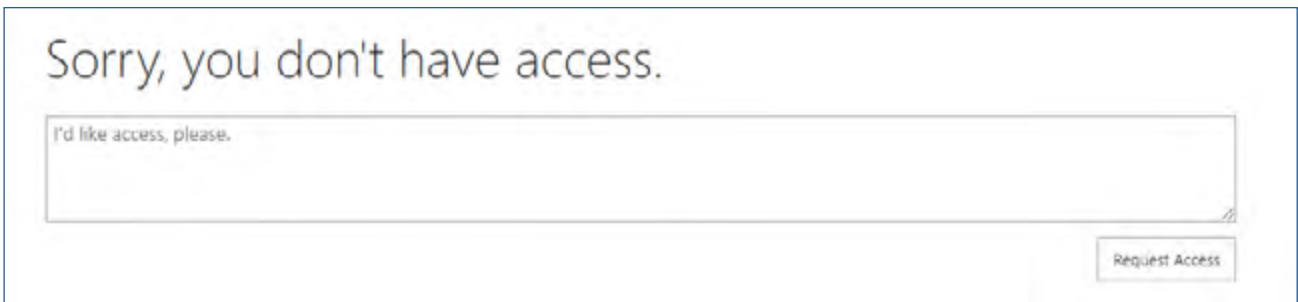
A new Word document will open containing the merged data for that specific response. This file will be called **Directory#**

Alternatively, you can select **“All”** to merge all records into one document if that makes editing easier for you.

Step 3: Save the new word file (**Directory#**) in the folder where you will keep all your project briefs. For quick reference it is recommended to save your file with the **date, requestor name and project name**.

9. Handling File Attachments

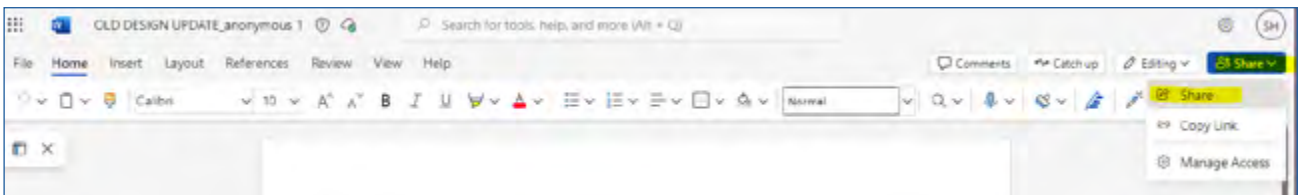
Respondents may have uploaded files through the form (e.g., images, PDFs, Word documents). These files are stored on your OneDrive and need to be properly shared with your design team. If you do not follow these steps then you will be emailed by the designer for access to the files via MS forms.



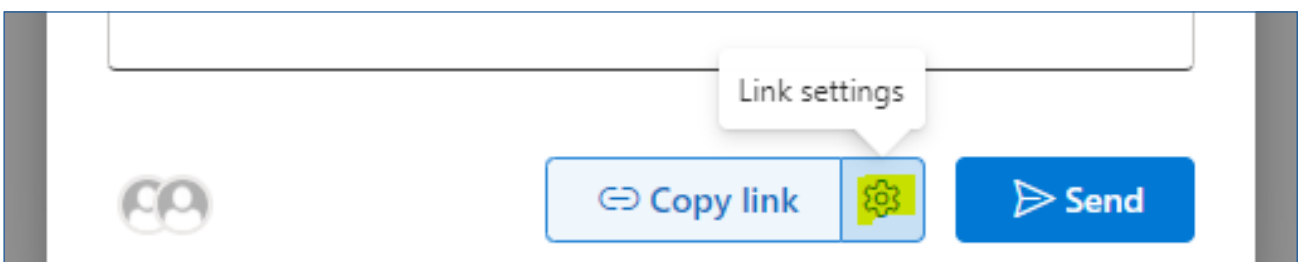
For Word Documents:

Step 1: Open the Word document link. This will open the Word file on Sharepoint.

Step 2: Click on **“Share”** in the top right corner.



Step 3: Click **“Link Settings”** which is indicated by a settings icon located next to the **“Copy link”** option.

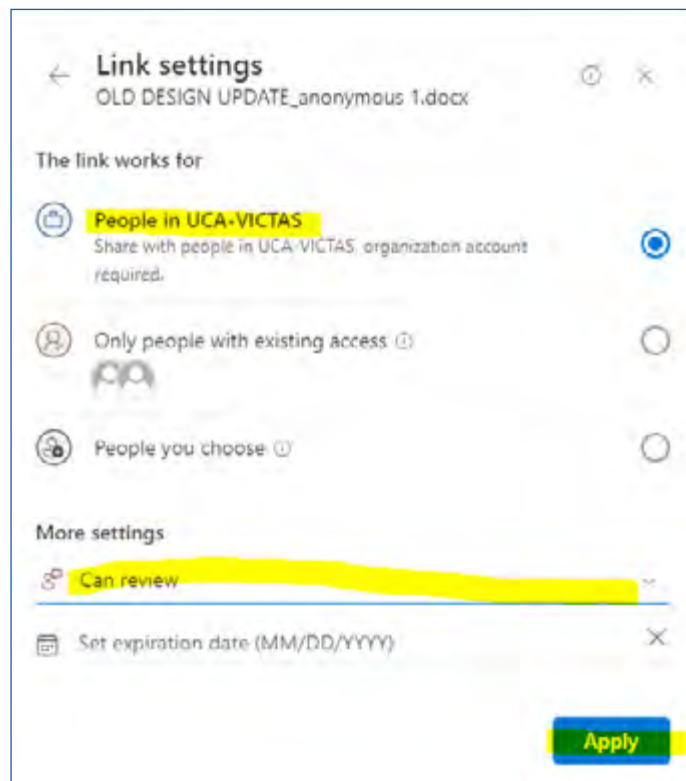


Step 4: In the sharing settings:

Click on **“People in UCA-VICTAS”**.

Ensure **“Can Review”** is checked in more settings.

Click **“Apply”**.



Step 5: Click **“Copy Link”** and paste this new link into your Word document, replacing the old one.

For PDFs and Images:

Option 1: Attach Files to the Email

Download the files from OneDrive.

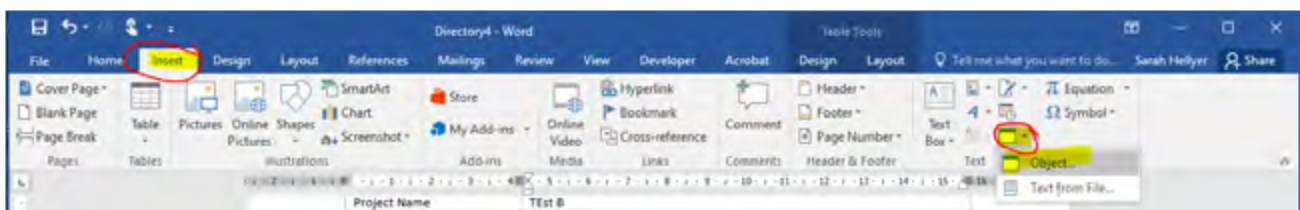
Attach them to the email when you send the Word document to the designer.

In the Word document, remove the link and add a note **“See attached file: filename.jpg”** so the designer will know which file is reference to.

Option 2: Insert Files into the Word Document

In Word, place your cursor where you want to insert the file.

Go to **“Insert”** > **“Object”** > **“Object...”**.



Select **“Create from File”** and click **“Browse...”**.

Locate the file you downloaded and click **“Insert”**, then **“OK”**.

Resize the object if necessary by clicking and dragging the corners.

You can watch a [video tutorial here](#) (video pending)

10. Cleaning Up the Document for Designers

Before sending the document to the designers, remove any unnecessary sections and ensure clarity.

Step 1: Delete any empty tables or sections that are not relevant to the specific request.

Select the unwanted table or row

Right-click and choose **“Delete”** or simply press the **“Delete”** key.

Step 2: Ensure all the links and attachments are correctly provided to avoid access issues.

11. Sending the Document to the Comms Team

With the document finalised:

Step 1: Save the finalised Word document.

Step 2: Attach any additional files to your email if you didn't insert/link them into the Word document.

Step 3: Send the email to the designer or the Content and Communications Manager, ensuring you include:

- The Word document
- Any attached files.
- Any additional instructions or notes.

Once the brief has been processed, you can remove the Microsoft Form responses.

To do this, review [page 4](#) of this guide.

Tips and Best Practices

- **Maintain a Master Excel File:** Keep a master Excel file linked to your Word template to minimise relinking issues.
- **Regularly Clean Responses:** Delete old responses from Microsoft Forms to keep your data manageable.
- **File Organisation:** Keep all related files (Excel, Word templates, downloaded attachments) in a dedicated folder for easy access.
- **Communication:** Provide clear notes for any files or sections that might be confusing to the recipient.

Troubleshooting

- **Missing Data Source Error:** If you encounter errors about a missing data source when opening the Word template, relink the Excel file as described in [Section 5.1](#).
- **Test Links:** Before sending, test all links to ensure the design team has access. If this is not done then the designer will need to request access via email.
- **Formatting Issues:** If the tables appear stretched, please ensure that all cell links are shortened or changed to hyperlink text. The stretched table is likely caused by links containing too many characters.