

SharePoint Surveys



SharePoint provides functionality to create one or more online surveys for your team or project. The survey and the responses are saved directly on your SharePoint site under a Surveys link. You control the format of the questions, survey permissions, and can view responses in several methods.

Create a New Survey

The Site Actions tab in your SharePoint portal is used to create new Surveys.

- Click the **Site Actions** button.
- Click **Create**.
- Under the Tracking section, Click **Survey**.

Name Your Survey and Choose Options

- Type in the name of your survey.
- Type in the description of your survey.

TIP: Users will see the description when they take the survey, so be informative.

- For the next option, it is a good idea to display the survey on the Quick Launch, so don't change the option.
- Select if you want to show users names in the survey results.
- Select if you want users to take the survey more than one time.
- Click **Next** to continue.

Entering Question Types



You are now ready to be entering the questions you wish to ask in your survey. Each question will be formatted differently depending on what type of format you need to use for the question.

- Type in the first question.

Types of Answer Details

There are several formats you can use to have the response formatted:

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Page Separator (inserts a page break into your survey)
- Business data

You may need to add specific additional choices if you use a particular option like YES/NO, Numbering, etc.

NOTE: There is a problem with the "Choice" function in the way it displays responses. It is suggested to use Rating Scale as a workaround.

Mandatory Responses

You can decide in the Additional Questions Settings section if you want the question's answer to be required, how many characters are allowed and if you want a default selected value, e.g., YES would automatically be selected.

Require a response to this question:

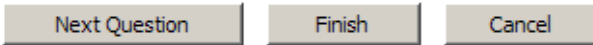
- Yes No

Maximum number of characters:

Default value:

- Text Calculated Value

Click either the **Next Question** button to create the next question or the **Finish** button if your survey is complete.



Take a Test Survey



After you have added all of your questions to your survey, it is a good idea to do a test survey so you can see how the end user will view and take your survey. Many mistakes in the survey or the formatting of the questions are caught in this process.

After you previously clicked Finish, SharePoint created a “Survey” link on the Quick Launch and added the survey to the list. However, you are not immediately looking at your welcome/main page at this point.



You are now viewing the *Survey Settings* section.

Questions	
A question stores information about each item in the survey. The following questions are currently available in this survey:	
Question	Type of answer
Would you want to be part of an ElementK User Group which meets periodically in the TSB Chapel to do self-study labs?	Choice
How long would you like the User Group gatherings to last?	Choice
What is the best time to meet?	Single line of text
If an ElementK Users Group were to be formed, what would you like to achieve from being a member?	Multiple lines of text
Would you like to see a Villanova SharePoint web portal created for ElementK users so the group can share calendars, document, tips and/or discussions?	Choice
<input type="checkbox"/> Add a question <input type="checkbox"/> Change the order of the questions	

Survey Settings



You can add more questions, rearrange the order, edit the survey name, description or questions, or assign permissions all from one location.

NOTE: You can access this area from the survey listing by clicking *Settings/Survey Settings*.

General Settings	Permissions and Management
<input type="checkbox"/> Title, description and navigation <input type="checkbox"/> Advanced settings <input type="checkbox"/> Audience targeting settings	<input type="checkbox"/> Delete this survey <input type="checkbox"/> Save survey as template <input type="checkbox"/> Permissions for this survey <input type="checkbox"/> Workflow settings <input type="checkbox"/> Information management policy settings

To Edit Existing Questions:

In the “Questions” section of the Survey Settings, all of the questions you created are listed in the order they were created.

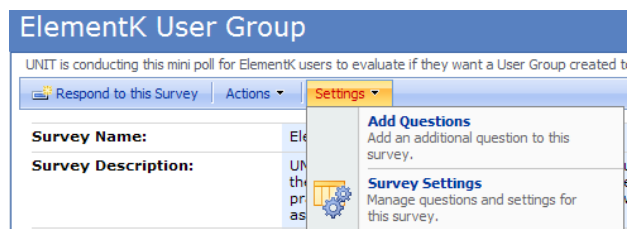
As you mouse over a question, it becomes underlined.

- Click the question name to access the original question and formatting.
- Make any edits and click **OK**.

To Add More Questions:

There are two methods to adding a new question:

1. From the Survey Settings:
 - Click the “**Add a question**” link at the bottom of the survey settings page.
 - Add the question and click **OK**.
2. From the menu bar on the questionnaire page:
 - Click the **Settings** button on the menu.
 - Click **Add Questions**.
 - Add the question and click either **Next Question** or **Finish**.



To Reorder Your Questions:

From the Survey Settings area:

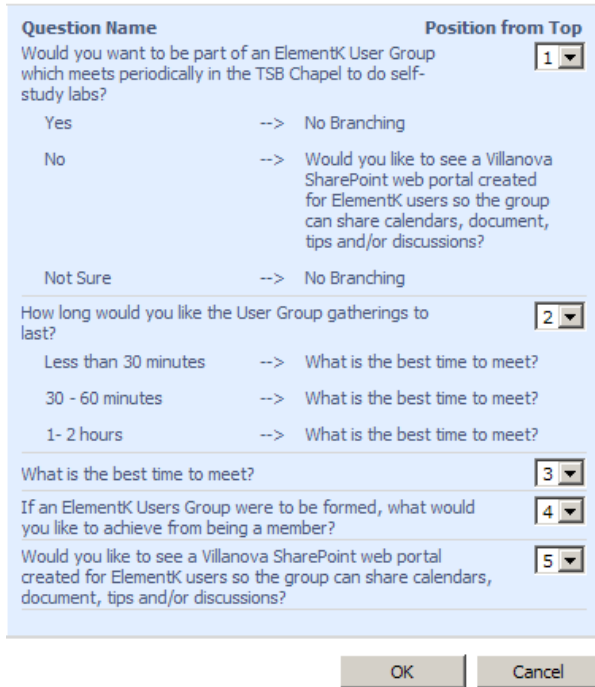


- Click the “**Change the order of the questions**” link at the bottom of the survey settings page.

➤ Renumber the questions by typing in the new number order at the end of each

question. If you change one of the numbers, all will auto renumber.

- When reordering is complete, click **OK**.



To Add Branching Logic to a Question:



SharePoint provides the ability to use branching to save the responder time depending on how they answer a particular question. It leads them down a path and avoids unnecessary

questions, depending on their response. For instance, if they choose a Yes response to a YES/NO question, they won't see the questions if they answered No.

Branching can be applied at the bottom of the question.

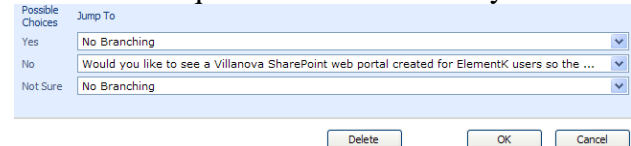
For each choice, add the option for branching to a particular next question from the drop down list.

To Delete Questions:



When you are editing a question, you will note that there is a "Delete" button at the bottom of the choices.

- Click the **Delete** button to delete the entire question from the survey.



To Edit the Title/Description/Navigation Settings:

From the Survey Settings area:
In the *General Settings* section:

- Click the **Title, description and navigation link**.

General Settings

- Title, description and navigation
- Advanced settings
- Audience targeting settings

- Edit each choice as needed.
- Click **SAVE** to save your edits.

To Edit Advanced Settings

From the Survey Settings area:
In the *General Settings* section:

- Click the **Advanced Settings link**.

General Settings

- Title, description and navigation
- Advanced settings
- Audience targeting settings

- Make the appropriate selections.

Read access: Specify which responses users can read

All responses
 Only their own

Edit access: Specify which responses users can edit

All responses
 Only their own
 None

Allow items from this survey to appear in search results?

Yes No

OK Cancel

- Click **OK** to save your selections.

To Grant Permissions to Survey Takers:



You need to assign permissions to the survey for the people who will be taking your survey. The “Contribute” permission will be assigned to the users or groups. **IMPORTANT:** Be mindful not to select all in the permissions list and then assign, because you may delete your own Admin rights to the survey.

- Click **Settings**.
- Click **Survey Settings**.
- Under “Permissions and Management”, Click **Permissions for this survey**.
- Click **Actions**.
- Click **Edit Permissions**.
- Click **OK**.
- (If you need to add users to the list, click **New** then **Add Users**.)
- Check off the names of the users or groups you wish to assign permission to.
- Click **Actions**.
- Click **Edit User Permissions**.
- Click the **Contribute** permission .
- Click **OK**.

Delete Your Test Answers/Responses



You will need to delete any test answers you created before

officially publishing your survey so the results don’t get misrepresented.

- Click the survey name from the list of surveys on the Quick Launch Bar.
- Click the **Show all responses** link.
- Click the drop down arrow next to each response and Click **Delete response**.
- Click **OK** to confirm the deletion.

Publish and Notify Survey Audience

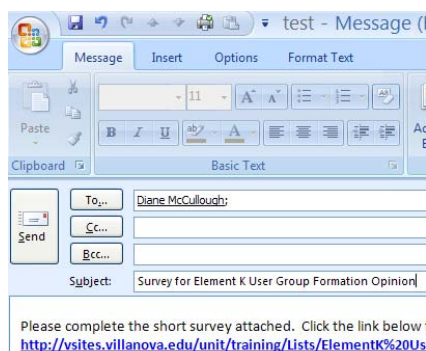


Your survey audience will receive an email with a link embedded to access your survey. However, once your survey is ready, it is a good idea to do a test on yourself first to make sure you get the email with the link and that the link works before sending your survey out to a group.

Create an email to be sent to your group. Type the subject, and body as you normally would.

To embed the link to your survey from SharePoint:

- Right click the name of your survey from the Quick Launch Bar.
- Click **Copy Shortcut**.
- Paste the shortcut into your email via the paste command.
- Press the **Enter** key and your link will become a hyperlink.
- Send the email with any instructions or other information necessary.



test - Message (1)

Message Insert Options Format Text

Clipboard Basic Text

To: Diane McCullough

From: [Redacted]

Bcc: [Redacted]

Subject: Survey for Element K User Group Formation Opinion

Please complete the short survey attached. Click the link below:
<http://vsites.villanova.edu/unit/training/Lists/ElementK%20Us>

Respond to a Survey



When your audience receives the email, they click the link you embedded in the email. When they enter SharePoint,

they see your survey.

They then click **Respond to Survey**.

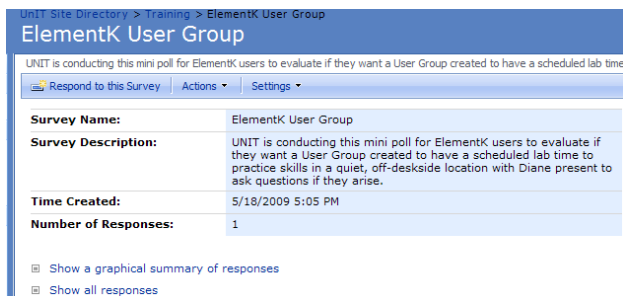
View Responses



You can review the results of the survey in two fashions: (1) show a list of graphical summary of responses or (2) show all individual responses.

- Open your survey from the Quick Launch bar by clicking the name of your survey.

The two options above appear at the bottom.



UnIT Site Directory > Training > ElementK User Group
ElementK User Group

UnIT is conducting this mini poll for ElementK users to evaluate if they want a User Group created to have a scheduled lab time

Respond to this Survey Actions Settings

Survey Name:	ElementK User Group
Survey Description:	UnIT is conducting this mini poll for ElementK users to evaluate if they want a User Group created to have a scheduled lab time to practice skills in a quiet, off-deskside location with Diane present to ask questions if they arise.
Time Created:	5/19/2009 5:05 PM
Number of Responses:	1


Show a graphical summary of responses
 Show all responses

If you select Show all responses:

- Click the drop down arrow next to each response.
- Click **View Response**.

Export to a Spreadsheet

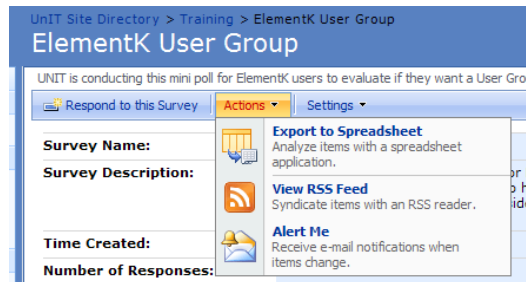
NOTE: Your Excel Macros must be *enabled* or you can't export from SharePoint.

- Click the **Microsoft Office Button** 
- Click **Excel Options**.
- Click **Trust Center**.
- Click **Trust Center Settings**.
- Click **Macro Settings**.

- Click **Enable All Macros**.

To export your results to Excel,

- Click the **Actions** drop down button from the menu bar.
- Click **Export to Spreadsheet**.



UnIT Site Directory > Training > ElementK User Group
ElementK User Group

UnIT is conducting this mini poll for ElementK users to evaluate if they want a User Gro

Respond to this Survey Actions Settings

Survey Name:	ElementK User Group
Survey Description:	UnIT is conducting this mini poll for ElementK users to evaluate if they want a User Gro
Time Created:	5/19/2009 5:05 PM
Number of Responses:	1

Show a graphical summary of responses
 Show all responses

Export to Spreadsheet
Analyze items with a spreadsheet application.

View RSS Feed
Syndicate items with an RSS reader.

Alert Me
Receive e-mail notifications when items change.

Select **Open** or **Save**.

If you choose Open, click **Enable** for the macros security warning and then wait for your spreadsheet to open in Excel.

Additional Resources

- Website used in training:
<http://vsites.villanova.edu/unit/training/>
- Element K Online Courses:
 - Getting Started with Windows SharePoint Services 3.0 (5465).
 - Creating and Managing Windows SharePoint Services 3.0 Site (5466).
 - Team Collaboration with Windows SharePoint Services 3.0 (5467).
 - Using Windows SharePoint Services 3.0 with Microsoft 2007 Office System Applications (5468).

