IITS Workshop

Creating Surveys using SharePoint
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Create a SharePoint Site

1. Go to: https://sharepoint.kings.edu
2. On the right, click on the image marked "Click here to begin setting up your SharePoint site."
3. On the new page, enter a Title for the site. This will appear at the top of your site pages.
4. Enter an optional Description.
5. Create a Web Site Address. Make sure your address is easy to remember and write it down, just in case.
   - For Instance: https://sharepoint.kings.edu/sites/sharepointdemo

6. Select a Site Template. The default is Team Site, but simple sites (surveys, forms) may be best in Blank.
   - Site templates CANNOT be changed after creation. Sites can be deleted and re-created in a new template, but no content will be preserved.
7. Click on Create.
8. Click OK to accept the default user settings temporarily.

***Write Down Website Address***
https://sharepoint.kings.edu/sites/___________________________

Enable Anonymous Access to your Site

1. At your main site, click on Site Actions and select Site Settings. Site settings on this site.
2. In the Users & Permissions column, select Advanced Permissions.
3. A list of site users/groups will display. On the toolbar, click Settings and choose Anonymous Access.
4. Access may be set to "Nothing." Select "Entire Web site."
5. Click OK to save your changes. Now users will be able to view your site without logging in. Permissions for web parts can be modified on an individual basis.
Create Your Survey

After you’ve created a site, you can create a survey to poll a group of people.

1. Click on **Site Actions** and select **Create**.
2. Select **Survey** under the Tracking section.
3. Enter a **Name** of the survey and an optional Description.
4. Choose whether you’d like to "Display the Survey on the Quick Launch." The Quick Launch is the bar on the left side of the site.
5. Select **No** to "Show user names on Survey Results" if you want to preserve anonymity.
6. Choose **No** to "Allow Multiple Responses" to ensure one response per user.
7. Click **Next** to begin adding questions...
8. Enter your first **Question** and select the **Type of Answer** to this question:
   - **Single line of text** - A one-line text box for short answers
   - **Multiple lines of text** - For open-ended, paragraph-sized answers
   - **Choice** - Multiple choice questions, from checkboxes, radio buttons, or dropdown lists
   - **Rating Scale** - For "On a scale of..." questions
   - **Number** - Only accepts number answers (good for age, zip, etc.)
   - **Date and Time** - Puts information in to Date/Time format
   - **Yes/No (check box)** - A variation on True/False, displays only Yes if box is checked
9. Choose whether to require a response to this question.
10. Your options will change on the remaining part of the screen depending upon the **Type of Answer** to this Question you selected.
11. Select **Next Question** to add another question or click **Finish** to complete your quiz creation. You can add questions later by accessing the Survey Settings area.

Add the Survey (Web Part) to your Homepage

1. Click on **Site Actions** and select **Edit Page**.
2. In the left portion, or wherever you desire, click **Add a Web Part** at the top of the column.
3. In the pop-up window, choose the Web Part you wish to add.
4. Check the box next to the item and hit the **Add** button.
5. The homepage will refresh with your added Web Part. Users will come to the site and click the "Respond to this survey" link under the survey title.

Survey Settings – **Add/Edit/Delete Questions, Re-order questions, Set Permissions, etc.**

1. **From the Homepage, Click on Survey Title** (the bar above the survey on the Homepage)
2. **Click on Settings and Select Survey Settings.**
Allow Anonymous Access to the Survey

After you've created a survey, you can enable anonymous access so any user on the web can participate.

1. Go to the Survey Settings page and select Advanced Settings in the General Settings column.
2. Set Read access to All responses and Edit access to Only their own.
   (This setting will be overridden in a few steps.)
3. Click OK to apply these changes.
4. Back on the Survey Settings page, click on Permissions for this survey in the Permissions and Management column.
5. A list of users will display. Click the Actions button and choose Edit Permissions.
6. A warning prompt will make you aware that you are breaking permissions from the parent site. This is what you want to do, so click OK.
7. The page will refresh with some changes, like the addition of a Settings button. Click on it and choose Anonymous Access.
8. Anonymous users are regular, un-authenticated users from the internet. By default they will have access to view items. Check boxes to grant them the ability to Add and Edit Items.
9. Click OK to apply these settings.
10. Once again, return to the Survey Settings screen and choose Advanced Settings.
11. Change Read access to Only their own.

Viewing Survey Results

1. As the administrator of the survey, go to your SharePoint site and click on the survey title (the bar above the survey on the homepage).
2. Click show a graphical summary of responses to view answers in a simple bar graph.
3. You can also click show all responses to open individual submissions.

Export Results to Microsoft Excel 2007

1. First, on your computer, launch Excel. Minimize it and go to your survey.
2. On the survey page, click Actions and choose Export to Spreadsheet.
3. A dynamic query will run and require communication with Excel. When prompted for what to do with the file owssvr.ify, choose Open.
4. Excel may prompt you too, about security measures. Click Enable to open the file.
5. Your results will display with filters on each column. Copy the information you want or save the file as a spreadsheet. Modify the information to create charts and graphs that suit your needs or use sorting features to weed out duplicates.
Example of Question Types:

Department *

[Input field]

Today's Date

11/17/2008

Which Microsoft Office Program do you use Most Often?

- Word
- Excel
- PowerPoint
- Specify your own value:
  [Input field]

What SharePoint training sessions have you attended?

- SharePoint Fundamentals
- Using SharePoint for the Classroom
- Collaboration
- Wikis and Blogs
- Specify your own value:
  [Input field]

How Likely are you to attend the following SharePoint Training sessions?

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<thead>
<tr>
<th></th>
<th>Likely 1</th>
<th>Somewhat Likely 2</th>
<th>Unlikely 3</th>
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<tbody>
<tr>
<td>SharePoint Fundamentals</td>
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<tr>
<td>Using SharePoint for the classroom</td>
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<td>Collaboration</td>
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<tr>
<td>Wikis and Blogs</td>
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</table>

Please list any other SharePoint training sessions you would like us to offer.

[Input field]