Surveys: Plan and Create Surveys

You can use surveys to ask people what they think about issues, how to improve your processes, and many other topics. You can collect the results by using several different types of questions, such as multiple choice, fill-in fields, and even ratings..

Plan a Survey:

A survey is a special kind of list that enables the owner to create questions, multiple people to respond to the questions, and the results to be summarized.

Before you create a survey, it is a good idea to map out the questions that you want to ask and the type of answers that you want to receive. For example, do you want someone to respond with their own words, enter a dollar amount, or choose from a list? You should also decide whether questions are required or optional.

In order for people to respond to the survey, they must have permission to contribute to the survey or to the site that contains the survey. If they don't have the necessary permissions, see the person who owns or manages your site.

As you develop questions, consider how you will want to analyze the data. For example, fill-in choices allow users to enter their own information. This enables more flexibility, if the user's answer doesn't fall exactly within the choices provided, but it can be more challenging to review and compile a diverse set of answers.

You can add branching logic to specific questions, so that the remaining questions in the survey are relevant to the respondent. For example, you can specify that questions about Internet topics appear only for people who say they regularly use the Internet. To specify branching logic, you first create the survey, and then specify the logic for the questions in the survey settings.

After you create a survey, you can add questions right away. As you add each question, you are prompted to specify the text for the question, the type of answer that you expect to receive, and any other settings needed for the question and answer type. If you need to revise your survey, you can add more questions or change existing questions later.

Types of survey questions and answers:

Single line of text: Use this type when you want people to type a word or a few words for their answer. You can specify a character limit and a default answer.

Multiple lines of text: You can specify the number of lines for the response, and whether the response is in plain text, formatted text, or formatted text that is also enhanced with pictures, tables, and hyperlinks.

Choice: This question type enables people to choose from a predefined list of choices. You can allow users to fill in their own text, in addition to the choices they are offered. The choices can appear as a drop-down menu, radio buttons, or check boxes. To enable users to select multiple options, use check boxes.

Rating scale: This question type provides a summary question with detailed questions and responses that are rated on a scale. You can define the range of the scale, such as 1 to 5 or 1 to 10, and provide text to explain the meaning of the scale.

Number: You can specify integers, decimals, or percentages, as well as a maximum and minimum range.

Currency: You can specify maximum and minimum values, the currency format, and other settings.

Date and time: You can specify that the answer is a date or both date and time. The answer displays a box with a calendar that helps people to choose a date.

Lookup: This type of question offers answers that are stored as a column in another list. With a lookup question, the choices offered are the same as the contents of the corresponding list.

Yes/no: This question appears as text followed by a single check box. A selected check box is considered Yes. The words Yes or No do not actually appear. If you want Yes or No to appear with your question, create a Choice question and then enter Yes and No as the choices.

Person or group: This option enables respondents to browse or search the directory service for values to use as answers. For example, if the answer to the question should be the name of a person in your organization, the respondent can select that person's name from your directory service.

Page separator: You can add a page break between questions by adding a page separator to your survey.

After you create the survey, people can see a **Respond to this Survey** button that they can click to launch the survey. You can let people know about the survey by sending out a link to it, adding an announcement about it, blogging about it, or linking to it from other sites. Once users start completing the survey, you can see their responses in a bar chart or as list items.
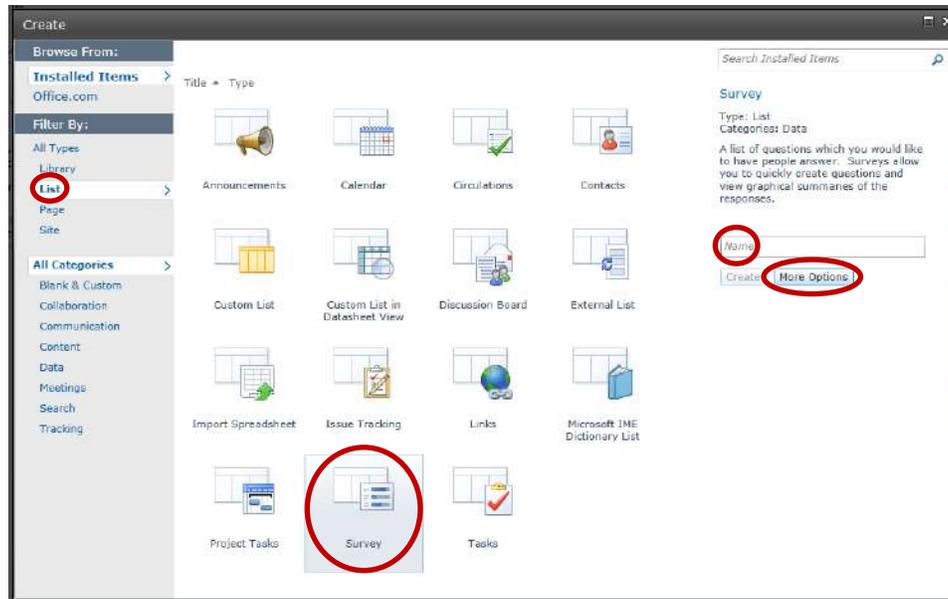
Create a Survey:

Navigate to the where you'd like to add a survey.

Click **Site Actions** and select **More Options**.

In the **Create** dialog box, select **List** on the left and click on **Survey**.

Give the survey a **Name** and click **More Options.**

Decide if you'd like the survey to show in the left **Quick Launch** navigation of the site.

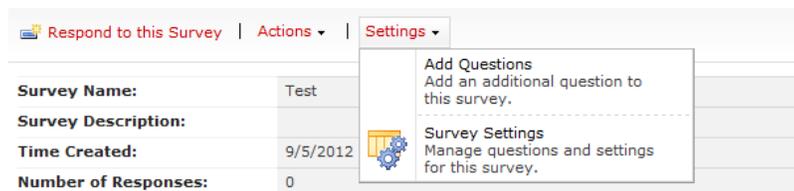Select whether to **Show user names in survey results** and/or if you will **Allow multiple responses**.

Click **Create**.

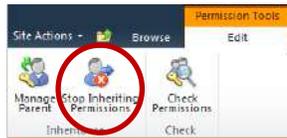Enter your questions. Once finished, click **Finish**.

Allow Permissions to Respond to Surveys:

Navigate to the **Survey**.

Under **Settings**, select **Survey Settings**.

Under **Permission and Management** click **Permissions for this survey**.
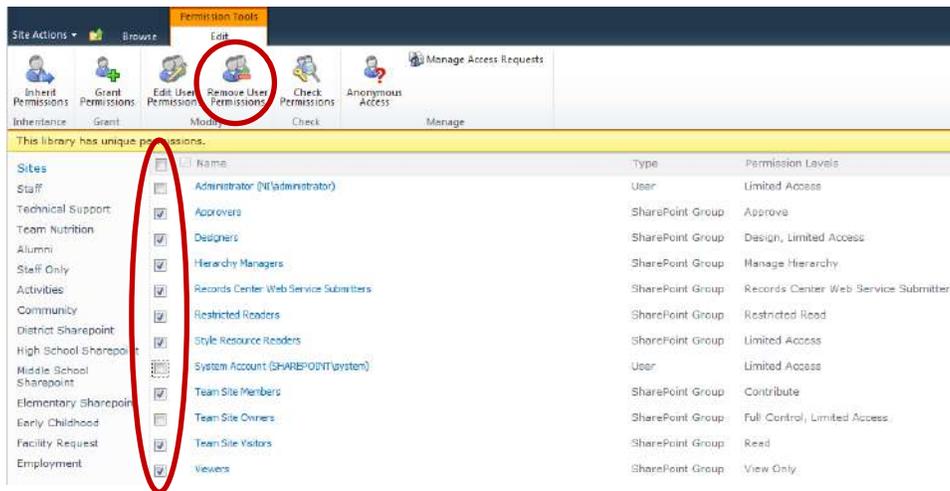Click **Stop Inheriting Permissions**. Click **OK**.

Select all users by clicking the top check box. Then **deselect** the following users, if available:

> Administrator
> Any SharePoint Group with "Owners" in the name, such as Y*our Name* Owners.
> System Account

With the rest selected click **Remove User Permissions**. Click **OK**.

Click **Grant Permissions**.

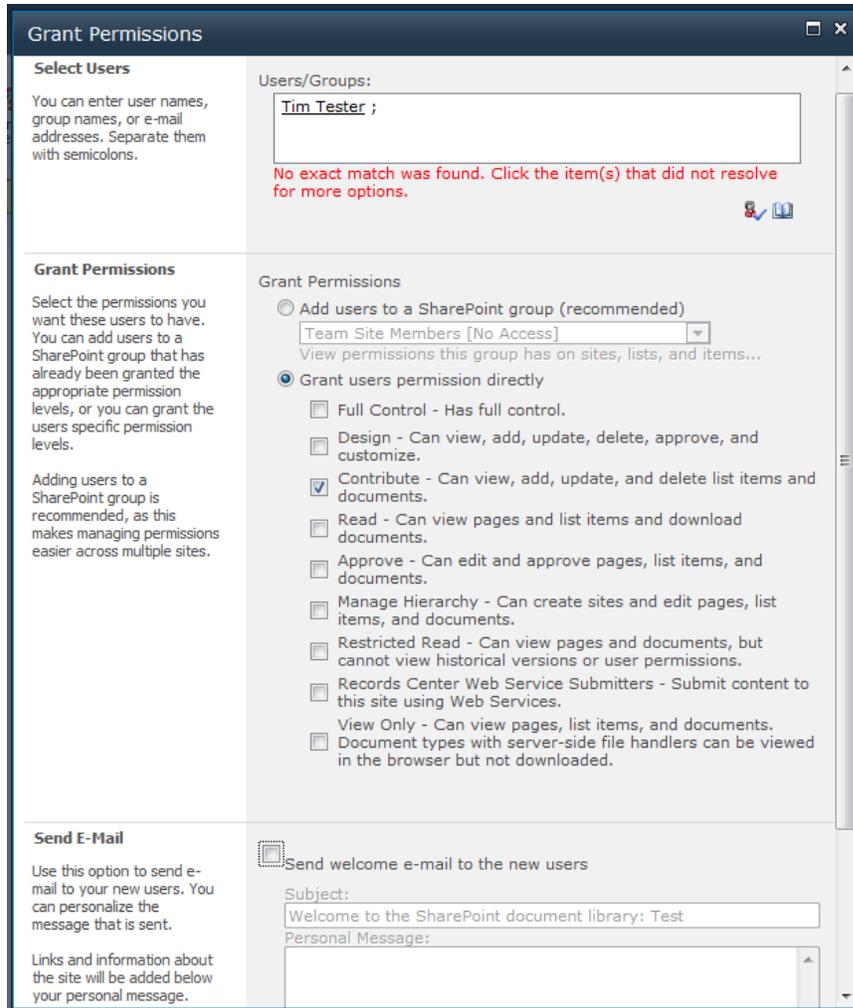In the **Grant Permissions** dialog complete the following:

> Add the users you'd like to have permissions to post to the discussions.
>> NOTE: Contact Tech Support if you'd like to add the all students group instead of individual users.
>
> Grant **Contribute** permissions directly.
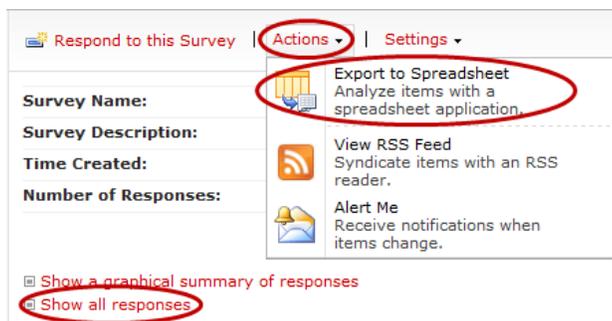> Uncheck the box to **Send welcome e-mail to new users**.
> Click **OK.**

The selected users will now have permissions to respond to the survey.

Additional Information/Options:
View Results:

View the results by clicking the **Show all responses** and opening each student's response

Export as an Excel sheet by clicking on **Actions**, and select **Export to Spreadsheet**.

Allow users to edit their responses:
> Go to the survey, click **Settings** and select **Survey Settings**.
>
> Under **General Settings**, click on **Advanced Settings**.

> For **Item-level Permissions**, allow users to **Read responses that were created by the user** and **Create responses and edit responses that were created by the user**.
>
> Users should then be able to click on **Show all responses** and see their own submission. From there, they can edit their response.

Allow users to finish survey at a later time:
> For users to be able to finish at a later time, follow the steps above to **Allow users to edit their responses**.
>
> Also, if you "required" things to be answered in order for the survey to be submitted, they will have to complete the required questions. So if you are allowing them to go back and edit things later, you may want to change any settings that "require" a question to be answered.