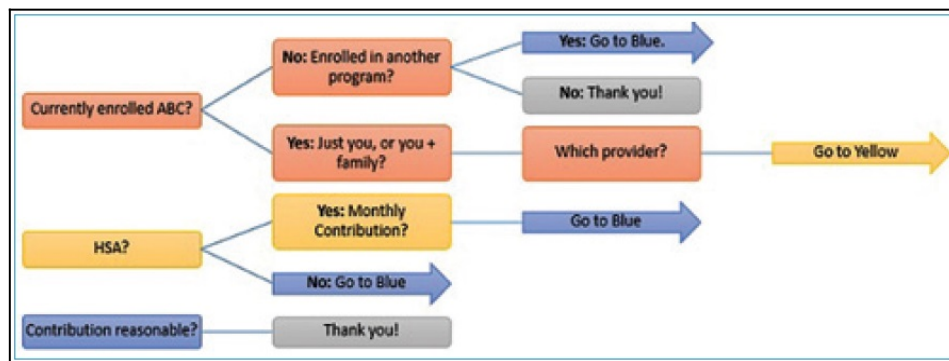


Setting up surveys in SharePoint

If your organization uses SharePoint 2010 or greater, you can create, fully featured, automated surveys without using an external app or software. And it's easier than you might think. In this article, we'll walk you through generating a seven question survey with only out-of-the-box tools in SharePoint 2013.

Let's create a survey about employee benefits with these seven questions:



1. Are you currently enrolled in the ABC Company employee benefits program?
2. Are you enrolled in another benefits program through your spouse or other family member?
3. Does the program in which you are enrolled cover just you, or you and your family?
4. Which health insurance provider did you choose?
5. Are you enrolled in the HSA program?
6. How much per month do you contribute to the HSA?
7. How reasonable is the cost of your program in the following areas: value, budget, options?

Some questions will require branching logic. Branching logic allows an answer to one question to determine what following questions are posed. In our example, the branching logic will look like this.

You can create a SharePoint list from the survey template or app. From 2010, click on the Site Actions button in the upper-left corner, and choose More Options. From SharePoint 2013, click the Settings wheel in the upper-right corner, and choose Add an app. Search for the word "survey" to find the Survey list template and choose it. From here, in 2010, you will be taken directly into the dialog box to start crafting your questionnaire. In 2013, you'll click into your survey and look for the Settings button. Choose Add Questions. After that, it's pretty much the same in both versions.

Type in the first question. In our example, it is a Yes/No question, so choose that option with the instructions in the question box to check if Yes. You'll need that instruction text for each Yes/No type question because it is not obvious in the end result. Continue to add questions by choosing Next question, selecting the appropriate type and defining its parameters. Choose whether an answer is required or not. Branching logic will be defined last.

The last question requires a rating scale for each area. Enter value, budget and options on separate lines in the subquestion area, and deselect the Show N/A option. It is not needed here. Indicate a 1 to 5 scale.

Now, you need the branching logic. It is possible to exit this survey having answered no to the first two questions. So add an “exit” question that just says thank you, is a Choice type column with only one choice, Done, and instructions to Click Finish.

Now edit each question in settings, specifying the branching logic represented in the page 1 diagram. You’ll want to test each possible path to take to make sure your branching logic works, deleting the previous survey each time.

Once you get your results, you can send to Excel to analyze.