The SharePoint Survey function can be used to take a traditional survey but it is also a useful tool for giving tests and examinations. This document will show you how to set up a SharePoint Survey and things to consider when doing so.

1. Open your SharePoint site and click on Site Actions on the Upper right. If you do not have a Site Actions button you do not have permissions to create a survey.
2. Click Create.
3. Select Survey under Tracking.
4. Put in a descriptive name for the Survey and a description of what it is in the description box.
5. Click Yes to display survey in the Quick Launch Bar. Only those whom you have authorized will see it but if you say No no one will see it.
6. Unless you have some good reason for doing so you should always say No to show users name in survey results. If you do not everyone will be able to see who has answered the survey and what their answers are.
7. Unless you want a person to take the survey more than once you should say No to Allow Multiple Responses.
8. Click the Next button.
9. Put in your first question in the box provided.
10. Select the type of question you are creating:

   | Single Line of text | Provides a box for the entry of 1 line of text.
   | Multiple Lines of Text | Provides a box for entry of multiple lines of text.
   | Choice | you key in a list of possible answers/choices and they select one.
   | Rating scale | a list of items they rate according to the scale you set up.
   | Number | answer must be a number.
   | Currency | answer must be currency.
   | Time Date | answer must be in time, date format
   | Lookup | allows user to look for the answer on the current SharePoint site.
   | Yes/No | User must choose yes or no (You can use choice for yes or no too)
   | Person or Group | user must choose a user or group from current site.
   | Page separator | puts a blank page in the survey.
   | Business Data | Not allowed on the SharePoint Server

Note: Once your survey is over you can change the security, removing permissions for everyone but the administrator for the survey. Then change the Show Names back to Yes and you will be able to see who responded and what their responses were. You will need to do this if you are using the survey for a test or examination.

8. Unless you want a person to take the survey more than once you should say No to Allow Multiple Responses.
11. Answer Yes or No to Require a Response to this question, whether the user must answer the question.

12. Depending on the type of question you chose you may be asked to provide additional information such as a list of possible answers if you chose Choice or a upper and lower limit if you chose number. You may also be given choices of how you want the answers to appear, again depending on the type of question you chose.

13. When you have completed your question you can either click on **Next Question** to add another question to your survey or click **Finish** if you do not wish to add any more questions.

**Setting up Branching Logic**

You can set you questions so that the next question the user gets depends on the answer they give to a question. For instance, if a question asked whether you were a homeowner or a renter I might want to ask the homeowners how long they have owned their homes and renters whether they planned on purchasing a home in the next five years. Branching logic allows you to do this. Only certain question types can be used for branching.

1. Set up all of your test questions including the questions you wish to branch to and click the Finish button.

2. Go back to your sites main page and click on the Survey you just created in the Navigation bar on the left.

3. Click on **Settings** and then on **Survey Settings**.

4. Scroll down until you see the list of questions.

5. Double click on the question you want to branch from

6. Scroll down until you see the branching logic boxes. Use the drop down arrow next to the box to select what question a given answer should branch to. The default is no branching.

7. When you are finished click the **OK** button.

8. Continue setting branching for other questions if you wish.

**Note:** Remember that if you use branching a user will not be asked to answer questions they do not branch to.
Setting Permissions for the Survey
Once you create your survey you will have to set permissions so that those you wish to participate in it can and those you wish to read it can. I usually exclude everyone else so they do not even see the survey but you can choose to allow whomever you wish.
1. Go to your sites main page and click on the Survey in the Navigation bar on the left.
2. Click on Settings and then on Survey Settings.
3. Select Permissions for this Survey from the 2nd column.
4. Select Actions and then Edit Permissions.
5. You will get a message telling you that you are about to create unique permissions. Click OK.
6. First check the box in front of all the People and groups you want to remove permissions for.
7. Click on Actions and then Delete Permissions and press OK.
8. Next click the box in front of all the users and groups whose permissions you wish to change.
9. Select Actions and then Edit User Permissions.
10. Set the permissions for the selected Users to what you want by clicking the box in front of the option. You can ignore the SLK options as they do not apply to us.
11. Click OK.

Caution!!
Never remove or change the permissions for the site Administrator. Never remove your own permissions. Doing so will cause the survey to become orphaned and unreachable.

Setting the Survey Advanced Options
1. Go to your sites main page and click on the Survey in the Navigation bar on the left.
2. Click on Settings and then on Survey Settings.
3. Click Advanced Settings in the first column.
4. Under Read Access select All Responses if you want responders to be able to read the responses from others or Only Their Own if you only want them to see their own responses.
5. Set Edit Access to Only Their Own as you do not want anyone to change someone else's answers.
6. Unless you want anyone who has a UF logon to be able to see the survey set Allow Items from this Survey to appear in Search Results to No.
7. Click OK.