

DocSurvey for SharePoint 2016 & 2013

Installation Guide

Version 3.5

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1 Intended Audience

This document is intended to be read and used by a SharePoint Farm Administrator who wishes to:

- Install and activate the DocSurvey functionality in a SharePoint 2013 or 2016 farm

2 Prerequisites

DocSurvey is a module of DocRead and it requires DocRead 2.1 or above to be installed on the SharePoint farm.

Before using this guide, please ensure your SharePoint Farm meets the minimum requirements as stated below:

2.1 Requirements for DocSurvey

2.1.1 Operating System

DocSurvey can be installed on all operating systems supported by SharePoint 2013 Foundation Edition (and above) and also all SharePoint 2016 editions.

2.1.2 Browser Client

The Browser Client requirements are the same as for Microsoft SharePoint 2013 & 2016 with the exception of Microsoft Internet Explorer 7.x. The only versions of Internet explorer supported by DocSurvey are version 8 or above.

2.1.3 Software

DocSurvey requires the following software to be installed and correctly configured:

1. Microsoft SharePoint Server 2013 Foundation (or above) or Microsoft SharePoint 2016 (all editions).
2. SQL Server 2005 or above (for the DocRead database)
3. .Net 4.0 is required on all Web Front Ends and Application servers.
4. DocRead 2.1 or above.

3 Installing DocSurvey

DocSurvey is a module of DocRead so the DocSurvey solution files are added to SharePoint by installing DocRead version 2.1 or above.

These instructions assume that you have DocRead 2.1 or above installed on your SharePoint farm.

3.1 Central Administration Settings

3.1.1 Install Licence key

You need to purchase a licence to use DocSurvey.

1. Got to the SharePoint Central Administration Site.
2. Navigate to 'Collaboris Settings > Licensing'.
3. Input your licence key in the box provided and click 'Add Key'. Details of the licence will appear in the 'Product Licence Details' section. Because DocSurvey is a module of DocRead you need to ensure that it is displayed under the modules section.



3.1.2 Deploy the DocSurvey files to your SharePoint Farm

Depending on how you installed or upgraded DocRead you may already have DocSurvey installed on your farm.

1. In Central Administration go to 'System Settings' and select 'Manage Farm Solutions'.

System Settings



Servers

[Manage servers in this farm](#) | [Manage services on server](#)



E-Mail and Text Messages (SMS)

[Configure outgoing e-mail settings](#) | [Configure incoming e-mail settings](#) | [Configure mobile account](#)



Farm Management

[Configure alternate access mappings](#) | [Manage farm features](#) | [Manage farm solutions](#) | [Manage user solutions](#) | [Configure privacy options](#) | [Configure cross-firewall access zone](#)



2. Check the status of the 'collaboris.sharepoint.quiz.solution2013.wsp' solution (this is the same even if you are using SharePoint 2016).

Name	Status	Deployed To
collaboris.readership.charting.solution2013.wsp	Not Deployed	None
collaboris.readership.solution2013.wsp	Deployed	Globally deployed.
collaboris.sharepoint.common.solution2013.wsp	Deployed	Globally deployed.
collaboris.sharepoint.quiz.solution2013.wsp	Deployed	Globally deployed.

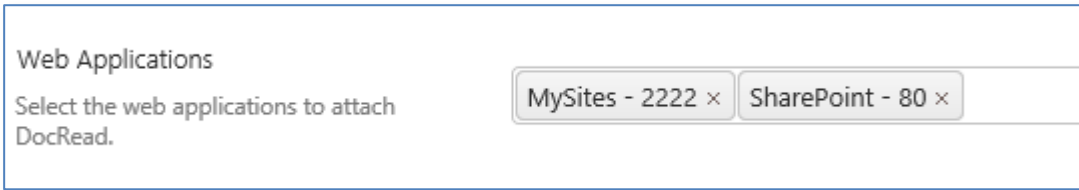
3. If the status is 'Deployed' then you do not need to perform any extra steps and can move to the next section of this installation manual.
4. If the status is 'Not Deployed' then select 'collaboris.sharepoint.quiz.solution2013.wsp' and select 'Deploy Solution' (again the .wsp name will state 2013 even if you are using SharePoint 2016).

Note: Selecting 'Deploy Solution to SharePoint' will cause IIS to restart on all web front ends which means that all your sites will be temporarily unavailable. We recommend that this is completed outside business hours to minimise disruption.

3.1.3 Deploy DocSurvey to a Web Application

DocSurvey depends on functionality provided by DocRead and, as such, it needs DocRead to be installed on the same Web Application. The following steps will cover how to install DocRead and DocSurvey on a Web Application.

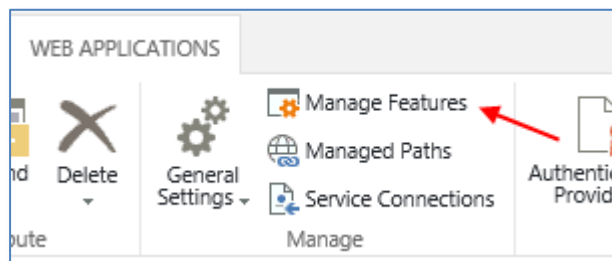
1. Select 'Collaboris Settings > Global Settings' page in Central Administration.
2. If the web application where you want to activate DocSurvey is already listed under the 'Web Application' section then you can proceed to step 4.



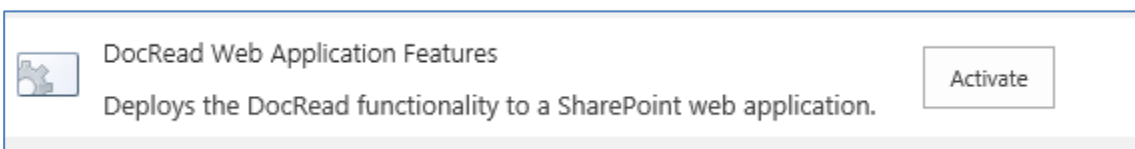
3. Click within the 'Web Application' box to view the available options and select the relevant web application(s) for your Farm. You can add multiple web applications by selecting them from the list provided.

Note: The other options within this page are only relevant for DocRead and are fully explained on the DocRead installation guide.

4. Press 'Ok' to save your changes and close the window.
5. Select 'Application Management > Manage Web Applications' in Central Administration
6. Select the relevant Web Application (this should be the same application that was chosen in step 2).
7. Under 'Web Applications' in the top menu bar, select 'Manage Features'.

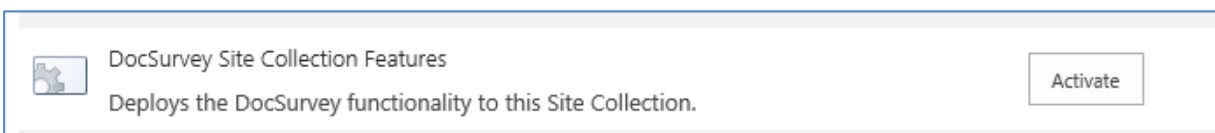


8. The 'Manage Web Application Features' page will be displayed.
9. Ensure that the 'DocSurvey Web Application Features' is active and click 'Activate' if not.





3.2 Site Collection Settings

1. At the site collection level from the 'Site Collection Administration' menu, select 'Site Collection Features'.
2. First activate 'DocSurvey Site Collection Features'.




3. If you also wish to use DocSurvey alongside your DocRead installation, activate the 'DocSurvey connector for DocRead' and the 'DocSurvey Form Requests Site Collection Features'.


	DocSurvey connector for DocRead Attaches the DocSurvey functionality to DocRead. Requires DocRead to be install on this site collection.
	DocSurvey Form Requests Site Collection Features Deploys the Collaboris DocSurvey Form Requests functionality to this site collection.

3.3 Site Settings

1. For each site where you wish to use DocSurvey, go to 'Site Actions' then 'Site Settings' and under the 'Site Actions' menu select 'Manage site features' then activate 'DocSurvey Site Features'.

	DocSurvey Site Features Deploys the Collaboris DocSurvey infrastructure to the SharePoint Web Application.	<input type="button" value="Activate"/>
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2. If you also wish to use DocSurvey alongside your DocRead installation then activate the "DocSurvey Form Requests Web Features".

	DocSurvey Form Requests Web Features Deploys the Collaboris DocSurvey Form Requests functionality to this site.	<input type="button" value="Activate"/>
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When this has been successfully completed the DocSurvey menu will appear on the 'Site Settings' page.

<p>DocSurvey</p> <p>Create new survey</p> <p>Manage surveys</p> <p>Site settings</p> <p>Reports</p> <p>Uninstall</p> <p>Manage Survey Requests</p>
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3. From this menu, go to 'Site Settings' and use the drop down arrow to select the group of users who will be able to view the DocSurvey reports.

<h2>DocSurvey Site Settings ⓘ</h2>	
<p>DocSurvey Site Administrators</p> <p>Please select the group of users that will have permission to view DocSurvey reports.</p>	<p>Site Group: <input type="text" value="Please Select"/> ▼</p> <p>The Site Group field is required.</p>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

4. Please remember to repeat the steps in section 3.3 for each site where you wish to use DocSurvey.

4 Support

We hope you have found this guide easy to follow and have successfully installed or upgraded DocSurvey on your servers.

If you require any further information please contact our support team by raising a ticket on our helpdesk system at <https://www.collaboris.com/support/> .