

DocSurvey for SharePoint 2013, 2016 & 2019

# User Guide

Version 5

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## 1 Intended Audience

This document is to be read and understood by SharePoint Site Owners who wish to create a Survey or Quiz using DocRead survey functionality:

## 2 Prerequisites

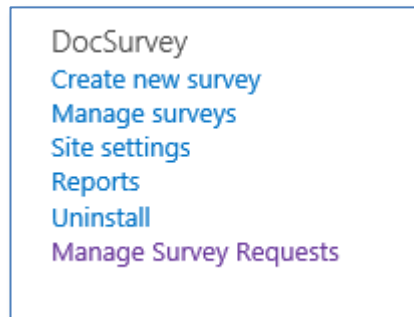
Before using this guide, please ensure the following conditions have been met:

- ✓ DocSurvey must have been installed and configured in your SharePoint Farm. For details on how to install DocSurvey please check the DocSurvey Installation Guide.
- ✓ The DocSurvey features are deployed and activated on your site. For more information on how to install DocSurvey on a SharePoint site please refer to the Installation Guide
- ✓ You are logging onto SharePoint as a user who has Site Owner who should have 'Full Control' over the site where you want to configure DocRead.

## 3 Introduction

This guide is intended to walk you through the process of creating a new survey, attach a survey to documents stored on SharePoint libraries and manage and viewing Survey reports.

Before using this guide, DocSurvey must have been installed in your SharePoint Farm and the initial Administration and Setup procedure completed to configure the system against the site where you want to use it. For information on how to deploy and configure DocSurvey on a SharePoint Web Application, Site Collection and Site please refer to the DocSurvey Installation guide.



## 4 Create a new Survey

### 4.1 Survey Settings

1. On the site settings page, under the DocSurvey Section select 'Create New Survey', this will take you to an initial screen where you can configure your survey.
2. Enter a name and description for your survey.

## Create New Survey or Quiz

Survey Name and Description  
Insert the name and description for the new survey

Survey Name

Description

3. Check the following boxes as required to select the relevant options.
4. Selecting 'Allow Multiple Responses' will allow a user to take the survey several times. If you intend to set a quiz with a pass rate and require the users to keep on taking the quiz until they achieve the minimum pass rate then it is essential that you check this box. If you are setting a feedback questionnaire and wish to restrict users by only allowing them to voice their opinions once then leave this box unchecked.
5. Select 'Show User Names in Survey Responses' if you want to show the name of the user responsible for each response on the view responses list. If you want to keep the responses anonymous then leave this checkbox empty.

Navigation  
Specify whether a link to this survey appears in the Quick Launch.

Display this survey on the Quick Launch

Allow Multiple Responses  
Specify if users should be allowed to submit more than one response.

Allow Multiple Responses

Show User Names in Survey Responses  
Specify if users' names should appear in survey results

Show User Names in Survey Responses

6. If you want to attach the Survey to documents stored in SharePoint or enable integration with DocRead then check 'Enable DocSurvey Functionality'.
7. Select 'Enable Scoring' if you want DocSurvey to calculate the response score and to enable scoring based questions.

8. Select 'Enable Survey Stats' if you want DocSurvey to collect statistical information about each response. This option needs to be enabled for the DocSurvey reports.

<b>Enable DocSurvey functionality</b> Allows you to enable or disable the DocSurvey functionality on this survey. You will not be able to attach this survey to a document if this option is disabled.	<input checked="" type="checkbox"/> Enable DocSurvey functionality
<b>Enable Scoring</b> Specify if you wish to enable scoring on the survey allowing you to set a pass rate and provide scoring based questions	<input checked="" type="checkbox"/> Enable Scoring
<b>Enable Survey Stats</b> Specify if you wish DocSurvey to track and provide reporting for the responses on this survey	<input checked="" type="checkbox"/> Enable Survey Stats



9. If you want to set a minimum pass rate input the required score as a percentage.
- a. If you want to use non-scoring questions (e.g. when asking for opinions etc.) then input 0.
  - b. If you are going to use a mixture of scoring and non-scoring questions then the final score will be calculated based on the results from the scoring questions only so please set the pass rate accordingly.

<b>Minimum Pass Score</b> Specify the minimum score required to successfully complete the quiz. Any responses below this score will be classified as failed.	<b>Minimum Pass Score (%)</b> <input type="text" value="50"/>
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10. Decide whether you want the users' answers and / or the correct answer to be included on the results notification and the users receipt by checking the relevant boxes.

<b>Display Answer Result</b> Check this box to display the result of each individual answer when displaying the response details	<input type="checkbox"/> Display Answer Result
<b>Display Response Score</b> Check this box to display the score value of the response	<input type="checkbox"/> Display Response Score
<b>Display Correct Answer</b> Check this box to display the correct answer when displaying the response details	<input type="checkbox"/> Display Correct Answer

11. Edit the pass / fail messages that will be displayed to users when they have completed the quiz. Default messages are included for convenience and can be easily amended here to reflect your circumstances.

<p><b>Success Message</b></p> <p>Specify the message to be displayed to users when their response score is above or equal the minimum pass score.</p>	 <p><b>Thank you for completing this Quiz.</b></p> <p>Congratulations you have successfully completed and passed this quiz.</p>
<p><b>Fail Message</b></p> <p>Specify the message to be displayed to users when their response score falls below the Minimum pass score</p>	 <p><b>Thank you for completing this Quiz.</b></p> <p>Unfortunately you have failed this quiz.</p>

## 4.2 Add questions

Your quiz or survey can contain as many questions as you need. You need to add them one by one on the next screen.

## Settings ▸ New Question ⓘ

### Question and Type

Type your question and select the type of answer.

Question:

Type your question here...

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Page Separator (inserts a page break into your survey)
- External Data
- DocSurvey : Multimedia quiz choice
- DocSurvey : Multimedia HTML (information only)
- Managed Metadata

The types of questions shown in the list reflect standard SharePoint options as well as special DocSurvey options. You will need to choose the correct type depending on the style of question you want to ask. In the section below we will explain the most commonly used SharePoint question types together with the types introduced by DocSurvey. For information on the remaining SharePoint question types please check the SharePoint documentation.

## 5 SharePoint question types

These options should be used when you simply want to gain a response or when there is no correct answer (e.g. for a survey, to ask for feedback etc.)

- **Single / multiple lines of text:** Use this option if you want the user to free type their answer in the box provided
- **Choice:** This allows you to provide a range of answers to the user, but the users answer is NOT checked for correctness or scored.

- **Rating Scale:** This can be used to gauge users opinions (e.g. on a scale of 1 to 10 where 1 is unlikely and 10 is very likely, would you consider using this product again?).
- **Page Separator:** Use this type of question when you want to introduce a page break on your survey

## 6 DocSurvey question types

- **Multimedia Quiz Choice:** when you want to present the user with a selection of answers, from which they must choose one correct answer. You can also state which option is the correct one so the quiz can be marked. It also allows you to add HTML and multimedia content just before the choices.

Question and Type

Type your question and select the type of answer.

Question:

What should you do if you hear the fire alarm?

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- External Data
- Page Separator (inserts a page break into your survey)
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- Managed Metadata



**Choices**

Type each choice on a separate line

Panic  
 Shout for help  
 Immediately leave the building by the closest accessible exit  
 Stay where you are and wait for help

**Correct Answer:**

Specify the index of the correct choice (starting from 1).

- **Multimedia HTML:** this option allows you to present the user with information only (e.g. watch a video clip or for a section header page) where you expect to present the questions to the user at a different stage.

**Html**

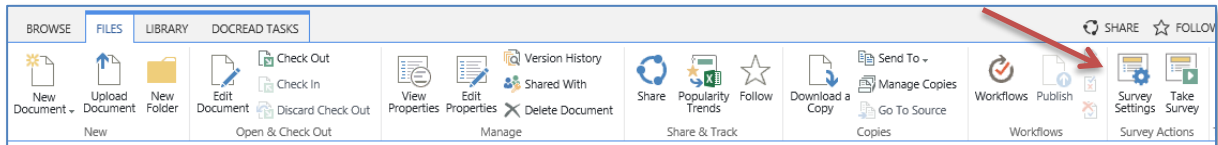
Design
 HTML
 Preview

Keep adding more questions until you have finished the quiz and then click 'finish'.

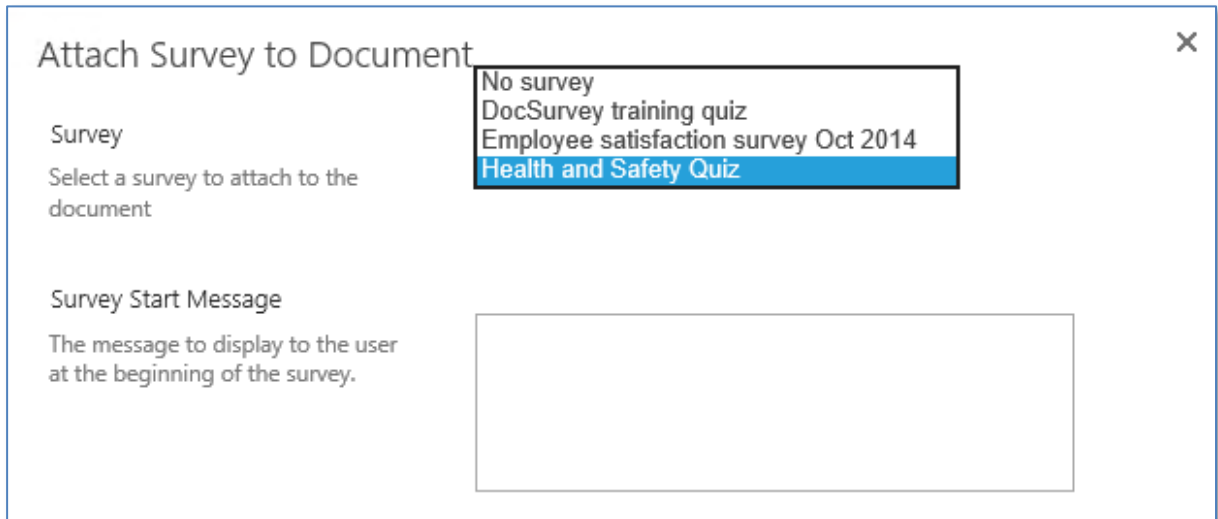
## 7 Attach a Survey to a document

DocSurvey allows you to attach a Survey to any existing document stored in SharePoint.

1. After creating your survey navigate to the document library containing the document that you want to attach the Survey to.
2. Select the relevant document by checking the box to the left of its name.
3. From the 'Library Tools' menu. Select 'Documents' and then 'Survey Settings'.



4. Use the drop down arrow to select the survey you wish to attach and add a message that will be displayed to the user at the beginning of the survey if required.

A screenshot of the 'Attach Survey to Document' dialog box. The dialog has a title bar with a close button (X). It contains two main sections: 'Survey' and 'Survey Start Message'. The 'Survey' section has a dropdown menu with four options: 'No survey', 'DocSurvey training quiz', 'Employee satisfaction survey Oct 2014', and 'Health and Safety Quiz'. The 'Survey Start Message' section has a text area for entering a message to display to the user at the beginning of the survey.

5. Click 'OK' to save the details.

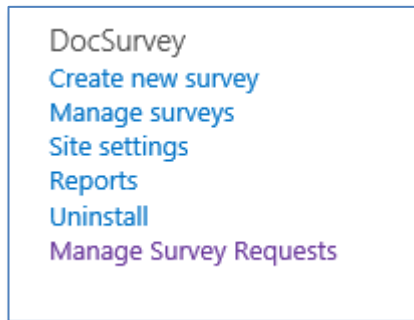
**Note:** You will only be able to attach Surveys that have the DocSurvey functionality enabled (see section 4.1 for more details).

**Note:** If the integration between DocSurvey and DocRead is enabled on your site attaching a survey to a document that is also attached to DocRead will cause users to be redirected to the survey when they try to complete the DocRead reading task.

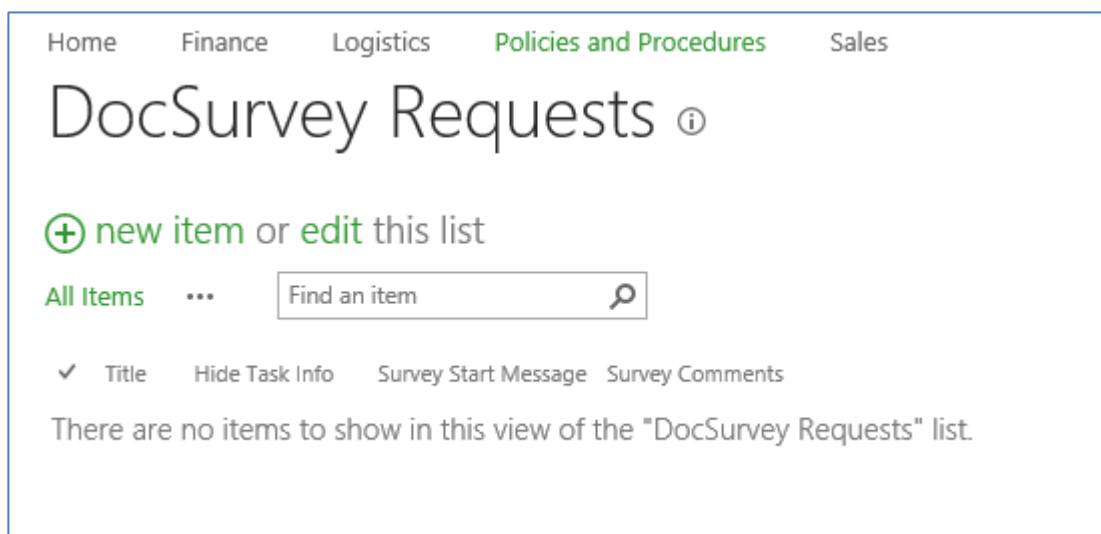
## 8 Survey Requests

A new survey request functionality was introduced in version 3.0. This new functionality allows you to request users to complete a Survey or Questionnaire without having to read a related document first.

1. From the Site Settings menu on the site that contains the survey you created with DocSurvey, click on the Manage Survey Requests option.



2. Click on new item.



3. Give your request a title / name and select the relevant survey from the drop down list.

Title *	<input type="text" value="Employee Satisfaction Survey"/>
Select Survey *	<input type="text" value="Employee satisfaction survey Oct 2014"/> ▼
Hide Task Info *	<input checked="" type="checkbox"/>

If you want the users to directly access the survey (as opposed to viewing the DocRead task pane first, also check the 'hide task info' box.

**Note:** Please be aware that the “Hide Task Info” functionality will only work if the “Enable Task Panel Hiding” option has been set on the DocRead WebParts.

4. Add a Survey start message and comment as appropriate

Survey Start Message	Your opinions are very important to use, please be as open and honest as possible.
Survey Comments	The results from this survey will be only be used for internal purposes

5. Select the correct group of people who need to complete the survey and set an appropriate response time in the acknowledgement period (days) box.

Required Audiences	<input type="text" value="All Users Group"/>	
	Acknowledgement Period (days) : <input type="text" value="7"/>	
Recommended Audiences	<input type="text"/>	
	Acknowledgement Period (days) : <input type="text" value="14"/>	

This uses basic DocRead functionality, for more information, please refer to the DocRead Publishers guide found in our documentation center here:

<https://www.collaboris.com/products/docread/documentation-center/>

**Note:** Each person will need to have a DocRead licence, if you experience a licensing error please contact [sales@collaboris.com](mailto:sales@collaboris.com) including a copy of any error message received

6. Save the data. DocRead will process and assign these Survey requests during the next scheduled task processing run.

## 9 Manage Surveys

To manage existing surveys and and survey statistics browse to 'Site Settings > DocSurvey > Manage Surveys'. This will load the Manage Surveys page which contains the following sections:

1. Search section – to be used to search for surveys with a specific name or attached to a specific document.

Survey Name	Linked Document Title	Show Archived	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Search"/>

2. Survey Name and Author

**DocSurvey training quiz : Helen Jones**

3. List of documents attached to the survey (there can be more than one document attached to the same survey).

<b>Standalone Survey</b>	0	10/9/2014 1:18:49 PM	False
<b>DocSurvey User Guide 2010 v2.2.pdf</b>	6	10/9/2014 1:28:50 PM	False

**Standalone Survey:** When a user completes a survey that is not attached to a document the statistical data associated with the response is stored under the "Standalone Survey" section.

### 9.1 View and Manage Survey statistics

#### 9.1.1 View Survey Statistics report for a specific document.

1. Navigate to the Manage Surveys page ('Site Settings > DocSurvey > Manage Surveys').
2. Click on the document name and select 'View Report'

Survey Name	Linked Document Title	Show Archived			
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Search"/>		
Linked Document	Responses	Created	Archived	Archive Title	
<b>DocSurvey training quiz : Helen Jones</b>					
Standalone Survey	0	10/9/2014 1:18:49 PM	False		
DocSurvey User Guide 2010 v2.2.pdf	6	10/9/2014 1:28:50 PM	False		
Employee Star	1	10/14/2014 1:44:54 PM	False		
<b>2014 : Helen Jones</b>					

### 9.1.2 Archive Survey Statistics

When creating a new version of a document the statistics associated with the previous version should be archived so that they can be compared with the statistics associated with the latest version. This will allow you to see if the level of comprehension has improved with the latest version.

To archive the statistics associated with a specific document follow these steps:

1. Navigate to the Manage Surveys page ('Site Settings > DocSurvey > Manage Surveys').
2. Click on the document name and select 'Archive Statistics'.

Survey Name	Linked Document Title	Show Archived			
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Search"/>		
Linked Document	Responses	Created	Archived	Archive Title	
<b>DocSurvey training quiz : Helen Jones</b>					
Standalone Survey	0	10/9/2014 1:18:49 PM	False		
DocSurvey User Guide 2010 v2.2.pdf	6	10/9/2014 1:28:50 PM	False		
Employee Star	1	10/14/2014 1:44:54 PM	False		
<b>2014 : Helen Jones</b>					

3. The system displays the 'Archive Survey Statistics' dialog box.

**Archive Survey Statistics** ×

You are about to archive the statistics for the survey attached to this document. This means that the current reports will be reset from this point. However, it is still possible to view archived statistics from the reports.

If you still wish to archive the statistics, please name the archive and click 'Ok' otherwise 'Cancel'.

Archive Title

4. Type a meaningful name for the archive and press 'Ok'.

## 10 Survey Reports

DocSurvey comes with two reports. We will be increasing the number of reports in future releases which will be made available for all customers with an active support plan.

### 10.1 Survey Dashboard Report

This is a high level statistics report that lists all the surveys on the current site together with the number of failed and successful responses. This report allows you to identify the documents that are most misunderstood so that you can do something about it.

1. Navigate to the Manage Surveys page ('Site Settings > DocSurvey > Reports').
2. Select 'Survey Dashboard' from the left menu.

### 10.2 Survey Details Report

This report shows the detailed statistical information associated with a specific survey and it can be used to identify critical areas (that are most misunderstood) within a specific document.

1. Navigate to the Manage Surveys page ('Site Settings > DocSurvey > Reports').
2. Select Survey Dashboard from the left menu or click on a specific survey listed on the 'Survey Dashboard' report.

## 11 Support

We hope you have found this guide easy to follow and have successfully created some useful surveys and quizzes for your organisation.

Please refer to the knowledgebase articles here <https://www.collaboris.com/knowledgebase/> in the first instance and if you still can't solve your problem, please raise a help request here <https://www.collaboris.com/support/> with your licence key and support package details and we will be happy to assist you.