# Using Surveys In Share Point for Training

-

AR Knowledge

# SharePoint Surveys to Support Training

As training and development professionals, we work very hard on creating and implementing programs to enhance the knowledge and skills of our employees. But how do we know how our programs are received? One of the best tools we have to find out this information is by survey. Summative evaluations, based off Kirkpatrick's Four Levels of Evaluation, are given after a training is provided and are used to determine the effectiveness of a course.

Objectively analyzing the effectiveness and impact of your training is essential so that you can make necessary improvements in the future. This step helps identify not only employee satisfaction, but also gives immediate feedback, measures the performance of your learning providers, courses, locations and learning methodologies, as well as helping to control costs and identify how to strategically spend your budget dollars.

The following white paper will identify a tool that provides all the capabilities to successfully employ level one of Kirkpatrick's Four Levels of Evaluation: Surveys.

## Survey Says

There are many ways to collect feedback — from printed surveys to personal interviews. As a training manager, it is important to find a tool that will give you the information you need in an easy to manage, straight forward way.

Did you know that you probably have the perfect survey tool right in your back pocket and didn't know it?

Over 80 percent of Fortune 500 companies use SharePoint but only a small percentage use even a portion of its capabilities. Using surveys in Microsoft SharePoint is a hidden gem that we will share more about with you in this paper.

## **Create a SharePoint Survey in Four Steps**

#### Step One: Ensure the 'Team Collaboration Lists' features is activated.

As an administrator, navigate to 'Site Settings' -> 'Site Features.' Scroll down the list and ensure that the 'team collaboration lists' feature says 'Active.' If it doesn't click 'Activate.'

#### Step Two: Create a new survey list from the 'create' menu

Now that the relevant feature is activated, you should now be able to add an application from the 'site contents' menu item. Once on the menu select 'Survey' and call the list 'Training Survey.'

#### Step Three: Add questions to your survey

It's time to add some questions about the employees training needs. You can obviously select your own questions and choose the relevant answer type (e.g., yes/no, text, number, radio list, etc.).

## ShareKnowledge

# SharePoint Surveys to Support Training

	tentumuu/marketing/saleskit/sk-usa/p 🖇	A constraint      Create a survey - SharePoint     Calorg		Amber Rasmussen - O	
iharePoint			Newsfeed SkyDrive Sites		
				Q SHARE ☆ FOLLOW	3
SHAREKnowledge"	Settings • New				
mber's Testing Site	Question and Type	Question:			
Home Documents Tasks	Type your question and select the type of answer.	The topics covered were relevant to me			
Calendar					
Recent:		The type of answer to this question is:			
Site Contents		O single line of text			
EDIT LINKS		Mutiple lines of text     Choice (menu to choose from)     Rating Scale (a matrix of choices or a Likert scale)     Number (1, 1.0, 100)     Currency (5, 4, 0)     Date and Time     Lookup (information already on this site)     Ves/No (check box)     Person or Group     Page Separator (inserts a page break into your survey)     External Data     Autocomplete Lookup Field     Managed Metadata			
	Additional Question Settings	Require a response to this question:			
	Specify detailed options for the type of arower you selected.	O Yes 💌 No			
	A rating scale question consists of a guestion and sub-questions that are				

#### Step Four: Configure your survey

As this stage you may be totally happy with the survey and it's ready to go. However, there may be a few things you want to do from here.

	smussen • Ø	Newsfeed SkyDrive Sites Amber Rasn			erkitrik unaris ,D = 🔒 🖒 👩 Sa		SharePoint			
SHAREKnowleder       Craining Survey , Settings         Amber's Testing Site       Lat Information         Home       Name:         Documents       Name:         Task       Mareine         Calendal       General Settings         Site Contents <ul> <li>Advanced Settings</li> <li>Advanced Settings</li> <li>Advanced Settings</li> <li>Site Contents</li> <li>Advanced Settings</li> <li>Advanced Settings</li> <li>Site Contents</li> <li>Si</li></ul>	ARE & FOLLOW									
Imperson       Security Se			HR 💌 Forum	g • FO • TechSupport •	SK DVR Marketing	Portal RF •	10			
Nome     Taining Survey       Nome     Taining Survey       Documents:     Note:       Taiks:     Description:       Calendar     Conmunications:       Recent     Eatrane, description and navigating       > Advanced settings     Permissions and Management       > Advanced settings     = Delete this survey:       > Advanced settings     = Delete this survey is template       > EDIT UNRS     = Advanced settings       > Advanced settings     = Generate file plan report       > Advanced settings     = Generate file plan report       > Advanced settings     = Generate file plan report       > Advanced settings     = Store survey sistemplate       > Advanced settings     = Generate file plan report       > Advanced settings     = Store survey sistemplate       > Enterprise Matdata and Keywords Settings     = Store survey sitemplate       > Form settings     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Generate file plan report     = Store survey sitemplate       > Gen				ettings	Survey • Set	Training	SHAREKnowledge"			
Note:       Web Address:       https://portal.competentum.u/warketing/taleski/t/sik-usa/project/amber/Uist/Training Survey/overview.aspx         Documents:       Description:         Tasks:       Permissions and Management       Communications         Calendar       entered       software       Permissions and Management       Communications         Recent       • Delete this survey       • Delete this survey       • RSS settings       • RSS settings         • Advanced settings       • Valdation settings       • Other this survey       • Reserve to this survey       • RSS settings         • Rubers trapped settings       • Save survey as template       • Reserve to this survey       • Reserve to this survey         • Rubers trapped settings       • Contraspect to this survey       • Reserve to this survey       • Reserve to this survey         • Rubers trapped settings       • Reserve to this survey       • Reserve to this survey       • Reserve to this survey         • Rubers trapped settings       • Reserve to this survey       • Reserve to this survey       • Reserve to this survey         • Rubers trapped settings       • Reserve to this survey       • Reserve to this survey       • Reserve to this survey         • Rubers trapped settings       • Reserve to this survey						List Information	Amber's Testing Site			
Decuments       Pecription:         Tails       General Settings       Permissions and Management       Communications         Recent <ul> <li>Lat name, description and nassattori</li> <li>Advanced settings</li> <li>Advanced settings</li> <li>Site Contents</li> <li>Advanced settings</li> <li>Site Contents</li> <li>Advanced settings</li> <li>Site Contents</li> <li>Advanced settings</li> <li>Site Contents</li> <li>Advanced settings</li> <li>Site Scription and nassattori</li> <li>Site Scription Site Scription Scription</li></ul>					Training Survey	Home				
Description:       Communications         Tasks:       Central Settings       Permissions and Management       Communications         Recent        Eat name, description and nassatter			nber/Lists/Training Survey/overview.aspx	tum.ru/marketing/saleskit/sk-usa/projects	https://portal.competentur	Web Address:	Documents			
Calendar     Cemeral Settings     Permissions and Management     Communications       Recent <ul> <li>List name, description and nansattion</li> <li>Advanced settings</li> <li>Advanced settings</li> <li>Advanced settings</li> <li>Validation settings</li> <li>Advanced settings</li> <li>Validation settings</li> <li>Rating settings</li></ul>		Description:								
Recent <ul> <li>Extrame, description and nanopation</li> <li>Site Contents</li> <li>Advanced settings</li> <li>Advanced settings</li> <li>Site Source is settings</li> </ul> <ul> <li>Advanced settings</li> <li>Advanced settings</li> <li>Site Source is settings</li> <li>Advanced settings</li> <li>Rating settings</li> <li>Rating settings</li> <li>Enterprise Metadata and Keywords Settings</li> <li>Form settings</li> <li>Enterprise Metadata and Keywords Settings</li> <li>Form settings</li> <li>Rating setings</li></ul>		mmunications	magement	Permissions and		General Settings				
Site Contents <ul> <li>Ist name, description and nanoation</li> <li>Reference strongs</li> </ul> <ul> <li>Site Contents</li> <li>Advanced settings</li> <li>Site contents</li> <li>Advanced settings</li> <li>Valation settings</li> <li>Site contents</li> <li>Advanced settings</li> <li>Rating settings</li> <li>Rating settings</li> <li>Rating settings</li> <li>Rating settings</li> <li>Rating settings</li> <li>Reprise Very Settings</li> <li>Reprintere</li></ul>						1				
Advanced settings     Advanced settings     Audion setings     Audion settings     Audion settings     Audion settings		SS settings		· Delete this surv	ion and navigation	= List name, descripto				
Addence targeting settings         Addence targeting settings         Rating settings         Rat			plate	= Save survey as			Site Contents			
Addence targeting settlings         Coversate Re plan report         Rating settlings         Coversate Re plan report         Transprise Metadata and Keywords Settlings         Torm settings         Coversate Replan report         Replane         R			s survey	· Permissions for			FOR UNKS			
Form settings     * Information management policy settings  Count on A questions A question stores information about each item in the survey. The following questions are currently available in this survey.  Count on     Type of answer     Required     The objectives of the training were clearly defined.  Participation and interaction were encouraged.  Vex/No			roport	= Generate file pl	Audience targeting settings		C LEVI LIVES			
Cuestions       A question stores information about each item in the survey. The following questions are currently available in this survey.       Required       Branching Logic         Caustion       Type of answer       Required       Branching Logic         The objectives of the training were clearly defined.       Yes/No       Yes/No			Enterprise Metadata and Keywords Settings		Rating settings					
A question stores information about each item in the survey. The following questions are currently available in this survey. Cluestion Type of answer Type of answer Required			rement policy settings	+ Information ma						
Calention     Type of answer     Repaired     Branching Logic       The objectives of the training were clearly defined     Yes/No     Yes/No       Participation and interaction were encouraged.     Yes/No						Questions				
The objectives of the training were clearly defined. Yes/No Participation and interaction were encouraged. Yes/No			le in this survey:	vey. The following questions are currently avai	rmation about each item in the survey	A question stores infor				
Participation and interaction were encouraged. Ves/No		Branching Logic	Required	Type of answer		Question				
				Yes/No	The objectives of the training were clearly defined.					
What did you like most about this training? Multiple lines of text				Yes/No	iteraction were encouraged.	Participation and in				
			~	Multiple lines of text	What did you like most about this training?					
The topics covered were relevant to me? Rating Scale				Rating Scale	The topics covered were relevant to me?					
Modified Date and Time				Date and Time	Modified					
Created Date and Time				Date and Time	Created					

Navigate to the survey settings page and let's deal with permissions and branching logic.

#### **Branching Logic**

Branching enables you to do some simple conditional testing of an answer. For example, if you ask "Were you pleased with the class location?" based on a "yes" answer you can take them straight to question 3 and skip the "What didn't you like about the location" question.

To setup branching select the question you want to branch from in the 'Survey settings' page. From there it's fairly straight-forward. Below is an example.

Image: Contention         Image: Contention </th <th></th> <th></th> <th></th> <th>1946</th>				1946
SHARE Knowledge Portal NP SK DVR Markening F0 TechSupport HR Forum			ft 7	k Ø
SHAREKnowledge      Settings      Edit Question       Amber's Testing Site      Amber's Testing Site      Amber's Testing Site      Amber's Testing Site      Additional Question and takes: this type of      Amber's Testing      Additional Question Settings      Sine Contents      Tor LINES      Additional Question Settings      Setup detailed oppose that the speed      Additional Question Settings      Setup detailed oppose that the speed      Additional Question Settings      Setup detailed oppose that the speed      Additional Question Settings      Setup detailed oppose that the speed      Setup detaile	SkyDrive Sites	Amber Rasmussen	. 0	?
Settings · Edit Question   Amber's Testing Site  Home  Por your question and type  Home  Documents  Tacks Calendar  Recent  Site Contents  · EDIT LINES  Additional Question Settings  perform statistic oppose to the type of  Documents  Docume		Q SHARE 🏠	FOLLOW	35
Home     Type your partition and salect the type of answer to this question is:       Documents     Tasks       Calendar     Image: Contents       Recent     The type of answer to this question is:       Site Contents     Single line of text       IDIT LINKS     Onumber (1, 15, 100)       Currency (5, 4, 6)       Previous Question Settings       Spendy detailed options that the type of				
Additional Question Settings Spendy detailed opports the trype of Processor of the type of answer to this question is: Site Contents IDIT LINES Additional Question Settings Spendy detailed opports the trype of Spendy detailed opports the trype of Spend				
Specify detailed options for the type of Vers.				
Branching Logic Specify if branching is enabled for this guestion. Branching can be used to skep to a specific guestion based on the user response. A page break is automatically inverted after a No What didn't you like about the location?				

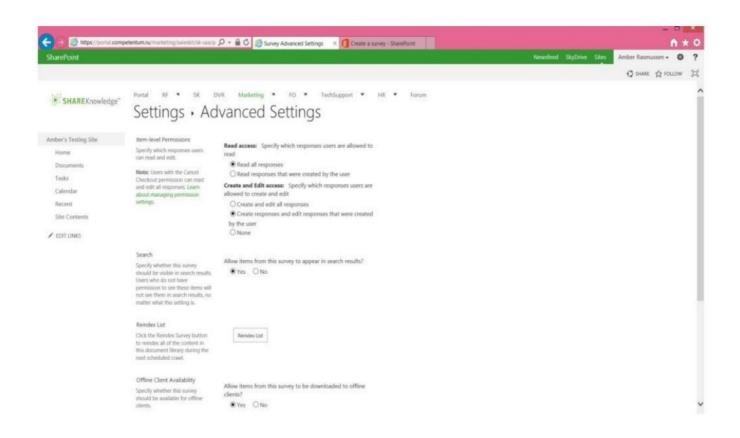
#### **Advanced Settings**

One final group of settings that you may want to make is around who can edit and view the answers when

they are input. This can be quite important if you do not want a user who has responded to be able to see all the other users' answers. The settings below illustrate this. You may also want to turn off search crawling if you don't want the answers to appear in search results.

## ShareKnowledge

# SharePoint Surveys to Support Training



Now that you've completed your survey, there are a variety of ways you can let people know about it from sending a link to adding an announcement about it, blogging, 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.

## Key Benets of using SharePoint Surveys

- Create customizable surveys to fit your needs
- Familiar interface for end users no need to learn a new application
- Ability to export survey results to Excel, view a an RSS feed, or get an email alert
- Several options for capturing survey responses
- Graphical display of responses
- Ability to save user data with the survey or capture the results as anonymous
- Allows individuals to submit multiple responses, or limit each user to a single response
- Longer surveys can be broken up over multiple pages
- Data are stored in your own environment and not linked out to an outside vendor

### ShareKnowledge

## Tips and Tricks for an Effective Survey

#### Developing a good survey

The key to obtaining good data through a survey is to develop a good survey questionnaire. Here are a few tips and examples to keep in mind:

- Tie your questions to the objectives of the training.
- Avoid creating a survey that is too long or too complicated.
- Determine which type of questions to use and when. Structured questions offer the respondent a closed set of responses from which to choose. Use when you have a thorough understanding of the responses so you can appropriately develop the answer choices and when you are NOT trying to capture new ideas or thoughts. E.g., do you feel the subject matter was relevant to the training course? Answer: True or False. Non structured questions are great to use when you're trying to capture new information. E.g., What did you like best about this training course?
- Use clear and concise language and start questions with who, what, why, when or where.
- Check for bias. Be sure you are not asking leading questions. An example would be "do you agree that additional training is necessary?"

Once you created your survey, consider these additional questions:

Who has permissions to take this survey? Are the results of individual answers visible for everyone?

You can tailor your survey to suit your individual needs. All of these types of issues can be adjusted by making edits in the survey settings section.

Tracking the performance of your training is crucial so that you can empower your employees to further increase their skills which will in turn help maintain a competitive advantage for your company. Knowing what is working and what is not plays an important part of a training manager's duties, which is why SharePoint surveys is the perfect solution to provide this information.

With the addition of ShareKnowledge learning management system - the LMS which works as a part of SharePoint - you can take your surveys one step further by incorporating them into a compound course. Once a person takes a course within the LMS, a survey will launch automatically in a given time after completion, making it as thorough and seamless as possible.

#### We hope you enjoyed this eBook and found the information we provided helpful. If you would like to learn

more about ShareKnowledge, please click on the link at the bottom of this page.

