Web Toolbox Guide for Creating Web Surveys

Main web tools page: http://www.webservices.uiuc.edu ←bookmark this site

1. Click the **"Login to the Toolbox"** link (requires Bluestem authentication = NET ID and password)
   Left menu bar has options:
   - "Event Calendar" is the place to create your event description
   - "RSS Manager" allows you to create RSS feeds for your events and news
   - "Form Builder" to create registration forms (workshops, seminars, retreats, etc)
   - **"Survey Builder"** to create a survey (evaluations, feedback, etc)

2. **Create a New Web Survey** *(FYI…"surveys" are almost identical to "forms"—use survey builder for surveys and form builder for registration forms)*
   - Go to "create/edit" under survey builder on the left hand menu
   - Click "create a new survey" at the top
     - Fill in he survey name, start date, and end date (can be edited later)
     - Select no-no-yes (viewer-user-line numbers) for the three options then hit save to begin the form & add questions
   - Go to "question" tab to add questions (including direction at top of form)
     - Click "add question" (or "insert question" after creating your first item)
     - Select tab for type of question you want (section header is for directions within form)
     - After entering Qs, hit save and view your form (note the form URL under "general" tab)
     - You can add, delete, and edit items (and change the order) later under the "question" tab
     - The "security" tab is where you designate who can access the survey (public, UI only, or subgroup within UI)
     - The "appearance" tab is where you set the overall look (skin) of the page (and also can tailor the specific message screens--thank you, workshop full, registration over…)
     - The "privilege" tab is where you set who (besides you) has access to viewing the survey results (or editing the form itself)
     - When done, you make the survey public by clicking on "activate the form" at the bottom of the "general" tab area
     - **WARNING**: Once active it is troublesome to close, edit, and reactivate the survey (make sure you have it all done before activating!)
     - Log out (left bottom of menu) when done and double-check the survey link to see if your survey is really active and ready to go

If you want some special fonts (bold, italics, embedded URLs, etc) you can use the html options in many fields (in both event descriptions as well as forms and surveys). Here are common HTML tags used in formatting:

<B>bold</B>
<I>italics</I>
<U>underline</U>
Insert a line break =

3. **View Completed Survey Forms (Results)**
    - Go to “create report” under survey builder
    - Under “results” section you should see all forms that you can run reports on (response summary)
    - Click “create report” next to the survey you want a summary of responses
    - Check off variables that you want summarized (usually all of them)
    - Select pdf or csv format (csv is for excel summary file, pdf is a print out of each individual form)
    - There is an option to get “single results” for a variable (uses one column in excel spreadsheet rather than a separate column for each answer)—this is usually the way to go
    - The “advanced features” tab is useful for labeling the excel columns and even the responses (1=TA, 2=faculty, 3=staff, etc)
    - When done setting up what you want a report on, hit the “generate report” tab on the top (takes you back to the main reporting page)
    - Go to “queue” to see if your report is out of the queue
    - Go to “reports” to see the final repot that was generated
    - Click “download” to download the report to Excel (you can edit the report inside Excel)*
    - You can delete or generate a new report at any time

*Extra download directions for some **Mac users**:
After downloading report you will be in Safari new window. Go to “EDIT” (menu in Safari), “SELECT ALL”, then “FILE” and “SAVE AS” (save as report.csv on your desktop). Close Safari and double-click the file you just saved on the desktop. It should open in Excel.

To analyze or print **open-ended comments** from a survey form, do the following:
1. Highlight Excel column and use FORMAT=>CELLS=>ALIGNMENT=>click “wrap text”
2. Copy & paste the Excel column into a word document
3. TABLE=>CONVERT=> “table to text” (make sure the cursor is inside the table)
4. Edit text as needed
5. Save and rename the Word document according to the open-ended Q title

To analyze **rated items** from a survey, do the following:
1. Delete the open-ended columns from the CSV “report” created with web tools
2. DK can usually be kept as DK or simply find/replace with a blank, blank cells (missing) can be left as is
3. Save as text file if needed (Stat View requires this, but most programs can import the CSV file directly)
4. Import file into stat software and make sure the stat program maintains data as continuous integers

***** WARNING ABOUT ACTIVATING SURVEYS *****

Before making a form or survey “active” double-check these options:

Maximum number of submissions allowed (often left blank for unlimited)?
Restrictions on access to form (public, bluestem, or bluestem sub-group)?
Maximum submissions allowed per respondent (usually 1)?
Start and end dates (default start at 12:01am and end on 11:59pm)?
Have all the screens in order (thank you, survey maxed out, survey ended, etc)?
Copied the survey URL and tested it?