SharePoint Survey Plus Web Part

Installation & User Guide
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Introduction

KWizCom SharePoint Survey Plus Web Part provides an enhanced survey interface, based on the standard SharePoint Survey list.


This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Product overview
- Installation guide
- Component activation
- Administrator guide
- FAQ
- Version release notes
Overview

Enhanced cross-site branched Surveys and Quizzes for SharePoint! Great-looking charts and fully customized questions/results interface.

You can use Survey Plus to easily deploy **Surveys** and **Quizzes**, including all types of question: Drop-downs, Radio Buttons, Checkboxes, rating scales and more.

The Survey Plus web part connects to a standard SharePoint Survey list, including remote surveys located in other sites – enabling you to easily implement cross-site surveys!
The surveys' results can be displayed in various types of great looking charts: Horizontal Bar, Vertical Bar, Line, Area, Pie, Spline, Bubble and Point.

Survey Plus enables you to divide a Survey/Quiz into several pages, and define which questions are displayed in every page (this is simply defined by using the standard SharePoint Survey list's separator column). Users can navigate between the pages using "Next" and "Back" links:
Survey Plus web part support also **Branching**, which allows you to implement **interactive questionnaires** - different questions are displayed according to users' answers.

The new Quiz mode allows users to save the questionnaire and later to pick up right where they left off:

Use the "Save" button to save the current questioner.
KWizCom Survey Plus is especially designed for customizations; Using the web part's CSS and XSL files you can fully customize the web part to support your specific business needs!

When the user returns to the questioner’s page he can continue from the question he left.
## Key Features & Benefits

<table>
<thead>
<tr>
<th>Feature</th>
<th>KWizCom Survey Plus web part</th>
<th>Standard SharePoint survey web part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supports both WSS 3.0 and MOSS 2007</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Full Support for IE7, IE6, Mozilla Firefox and Google Chrome</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Survey scope</td>
<td>Organization</td>
<td>Single site</td>
</tr>
<tr>
<td>Support multiple question surveys</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Two survey modes: Survey and Quiz</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Support anonymous voting, including Cookie checks for unique anonymous user submission</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Enable saving questionnaires before submission and enable users to continue from where they left.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Support SharePoint survey list branching</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Clean and sleek survey presentation</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Resizable chart display</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Colorful survey results display</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Eight different graph types</td>
<td>✓</td>
<td>Horizontal only</td>
</tr>
<tr>
<td>Fully customizable interface via CSS &amp; XSL.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Display available answer as a drop-down box, radio buttons or checkboxes (with multiple selections).</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>User redirection to a custom page after survey submission.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Confirmation message display option - inside the web part or in a different web page.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Customizable label displays – show the quantity of responses in fixed numbers or percentage form, inside the survey result chart’s labels, bars or both.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Support mandatory responses for the survey questions</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Multi-lingual (standard for all KWizCom components)</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Installation

Software prerequisites

Server Requirements

1. Microsoft Windows SharePoint Services 3.0
   or

Client PC Requirements

1. Microsoft Windows XP (SP2)/ Windows Vista
2. One of the following browsers: Microsoft Internet Explorer 6,
   Microsoft Internet Explorer 7, Mozilla Firefox or Google Chrome

Installation Procedure

1. Log in as local admin to our SharePoint server.
2. Unzip the KWizCom SharePoint Survey Plus zip file on your SharePoint server.
3. Double-click the .msi file in order to begin the web installation.
   • When the installation process is complete it will recycle all application pools automatically.
Post Installation

1. After completion of the installation, you will see a new KWizCom entry in Windows Start -> All Programs -> KWizCom containing the following programs:

   ![About SharePoint Survey Plus]
   Display General Information about the component.

   ![Activate SharePoint Survey Plus]
   This utility enables you (the SharePoint Administrator) to activate the downloaded evaluation version.

   ![SharePoint Survey Plus User Guide]
   Link to user-guide document (.PDF).

2. When you browse your SharePoint Portal / Windows SharePoint services site, a new Survey Plus Web Part will be available for you under "virtual Server Gallery".
Component Activation

KWizCom components are available for evaluation prior to purchase. This way you can try our components and verify that they indeed meet your needs. An evaluation version for each KWizCom component contains all features of the component's production version. The only difference is that an evaluation version is time-limited, and will operate for a period of one month.

Once you decide to order a KWizCom component, you will need to follow the following steps:

2. Send us the installed evaluation version's product Code (you will see the product Code on the "About" product page:

   Please use the Activation Request web form, on KWizCom web site to send us your product code.
3. Get the component activation key – this key will be sent to you by email once your order is processed.

4. Activate your installed evaluation version -
   click Start -> All Programs -> KWizCom -> SharePoint

   SurveyPlus Web Part -> 🔄 Activate SharePoint SurveyPlus web part
**Administrator Guide**

**Introduction**

When you browse your SharePoint Portal / Windows SharePoint services site, a new Survey Plus Web Part will be available for you under "virtual Server Gallery":

![Add Web Parts](image)

This section reviews Survey Plus web part's properties and configuration options.
Web Part Properties & Configuration Options

The web part's properties are grouped to 6 categories:

- Survey Data Source
- General Display Settings
- Survey Questions Settings
- Survey Results Settings
- Survey Submit Settings
- Survey Chart Settings
- Errors

The following sections provide details about each category.
Survey Data Source

This section defines the location (URL) of the SharePoint site that contains the standard SharePoint Survey List you wish to connect to the Survey plus web part.
Type this URL in the first textbox, titled "Survey List URL" and press the "Load" button.
At the drop down box (titled "List Name"), you should select the name of the list you wish to display.
General Display Settings

Use this section to setup general display settings:

- **CSS File** – Define an alternative CSS file to allow the customization of the graphic layout of the KWizCom SharePoint Survey Plus web part.

The Survey Plus web part uses the following SharePoint styles:

<table>
<thead>
<tr>
<th>SharePoint style name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ms-formtable</td>
<td>Styling for the main table that includes all other web part tables.</td>
</tr>
<tr>
<td>ms-summarystandardbody</td>
<td>Styling for the table of the Survey Questions Display</td>
</tr>
<tr>
<td>ms-announcementtitle</td>
<td>Styling for the Survey title</td>
</tr>
<tr>
<td>ms-titlearea</td>
<td>Styling for the Survey date</td>
</tr>
<tr>
<td>ms-</td>
<td>Styling for the messages that are</td>
</tr>
</tbody>
</table>
webpartpagedescription being presented to the users, inside the web part.

- ms-toolbar Styling for the buttons
- ms-formlabel Styling for the questions' text
- ms-radiotext Styling for the answers' text

After you create your own style sheet, you will need to place the new .CSS file in the following directory:

*C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\LAYOUTS*

To create your own .CSS file, please follow these steps:
1. Create a new .CSS file using your favorite text editor.
2. Inside the file, be sure to include the styles used by the Tagging Feature (those you wish to change).
3. And to replace the 'ms' prefix with your own.
For Example:

```
.[your_prefix]-formtable
{
    [Insert your own style configurations here]
}
```

- **Question XSL File** - Define a customized XSL Transform file that will be used to render the poll question segment.
The best way to create your own .XSLT file is to copy the default one and edit it. You can find the default file in the following folder:

*C:\Program Files\Common Files\Microsoft Shared\web server extensions\wpresources\KWizCom.SharePoint.WebParts.QuickPoll\...

- **Answers XSL File** – Define a customized XSL Transform file that will be used to render the poll answers segment.
The best way to create your own .XSLT file is to copy the default
one and edit it. You can find the default file in the following folder:

*C:\Program Files\Common Files\Microsoft Shared\web server extensions\wpresources\KWizCom.SharePoint.WebParts.QuickPoll\...

- **Default Display Mode** – Choose between Questions display or Results display (this is what the web part displays by default).

- **Show Already Responded Message** – Mark this check box if you wish to present the users with a message, inside the Survey Plus web part that informs them, that the survey response has already been submitted and therefore the user cannot respond again. (Only for single response per user surveys).

- **Poll Already Responded Message** – Allows you to customize the message that will be displayed to the users when a single response per user survey is chosen and the user has already submitted a response.

- **Poll Not Available Message** – Allows you to customize the message that will be displayed to users if the connected survey list is missing or if it is not available.

- **Poll Not Authorized Message** – Allows you to customize the message that will be displayed to users that have no permissions to answer the survey.

- **Display survey questions to users who did not vote** – This allows you to set a default view based on whether or not the user has voted the survey.
# Survey Questions Settings

In this section you can define how to present the survey questions.

<table>
<thead>
<tr>
<th>Survey Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Partial Answer Message</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>You already answered this quiz partially. What do you want to do next?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Continue Answer Message</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue from where I stopped</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Start New Quiz Message</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start new quiz</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delete Partial Answer Message</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete partial quiz and start a new one</td>
<td></td>
</tr>
</tbody>
</table>

- [ ] Display Survey Date
- [ ] Display Survey Title

**Survey Title**

**Survey Plus**

**"Submit" Button Caption**

Submit

**"Next" Button Caption**

Next

**"Back" Button Caption**

Back

**"Save" Button Caption**

Save

- [ ] Show "Clear" Button

**"Clear" Button Caption**

Clear
• **Survey Type** - Choose between **Survey** and **Quiz**, depending on your need- survey to display SharePoint polls or quiz to display questionnaires and assignment with the enhanced save quiz ability.

• **Partial Answer Message** - Define your own caption for the partially answered quiz options (which appear when the user returns to the page after saving the survey\quiz)

• **Continue Answer Message** – Define your own caption for the message offering the user to continue answering the survey/quiz from the place it was left.

• **Start New Quiz Message** – Define your own caption for the message offering the user to start a new quiz instead of the one he partially filled.

• **Delete Partial Answer Message** – Define your own caption for the message offering the user to delete the quiz that he partially filled.

• **Display Survey Date** - Select to show/hide the survey's date.

• **Display Survey Title** - Select to show/hide the survey's title.

• **Survey Title** - Define your own caption for the survey's title.

• **"Submit" Button Caption** - Define your own caption for the survey's "submit" button.

• **"Next" Button Caption** - Define your own caption for the survey's "Next" button.
• "Back" Button Caption - Define your own caption for the survey's "Back" button.

• "Save" Button Caption - Define your own caption for the survey's "Save" button (displayed in Quiz mode).

• Show "Clear" Button - Select to show/hide the "Clear" button which clears the filled answers.

• "Clear" Button Caption - Define your own caption for the survey's "Clear" button.

• Show "Results" Button - Select to show/hide the "Results" button which enables users see the poll summary chart.

• "Results" Button Caption - Define your own caption for the survey's "Results" button.

• Mandatory Fields Message - Customize the message that will be presented to the user when a mandatory question has not been
answered.

- **Questions Image File** - URL of an image file that can be displayed above the displayed questions.
Survey Results Settings

In this section you can define how the survey results are displayed:

- **Display Survey Date** - Select to show/hide the survey's date.

- **Display Survey Results Title** - Select to show/hide the survey's title.

- **Survey Results Title** - Define your own caption for the Survey Results display.

- **Always Show "Current Survey" Button** - Select to always show the "Current Survey" button to users. If the checkbox is unchecked then this button will **not** be displayed if the user has submitted the single allowed response, this is for single response per user surveys only.
• **Results Image Results** – URL of an image file that can be displayed above the displayed results chart.

• **Alt Text Title** – Define the Chart tooltip's title. The chart tooltip displays the voting results distribution.

## Survey Submit Settings

This section allows you to define the action that will be performed when a user submits a response to the survey.

![Submit Behavior](image)

You can select one of the following options in the "Submit Behavior" drop-down box:

• **Redirect_to_a_Different_Url** – Select this option if you wish to redirect to a chosen URL after the user submits a response. You can define the target site's URL in the "Redirect Url" textbox below.

• **Show_Results_Chart (default)** – This will open the Survey Plus Results Display, which will be updated with the current user's response details.

• **Show_a_Confirmation_Inside_Poll** – When selected, the web part will maintain the Questions Display but will present to the user...
a confirmation message below the survey's questions. You can customize the confirmation message text using the "Confirmation Text" textbox below.

- **Show_a_Confirmation_into_Confirmation_Page** – This will open a SharePoint page title "Confirmation" which displays a confirmation message to the users, when they submit their responses:
Survey Chart Settings

This section allows you to modify the appearance of the chart that is being used in the Poll Results Display.

You can modify the following properties:

- **Chart Width / Chart Height** – Define dimensions (in pixels) of the chart displayed in the survey’s results view.
- **Chart Type** - Select from eight different chart types:
  - Horizontal Bar.
  - Vertical Bar.
  - Line – direct lines between chart points.
  - Area – colorful fill under the chart line.
  - Pie – A circle divided according to the different responses.
  - Spline – A sleek looking line between the chart points.
  - Bubble – Each chart point looks like a nice big bubble.
  - Point – Simple points.
- **Display Quantity Type** - Select to present the quantity of the responses in fixed numbers or as percentage ratio.

- **Display Quantity Location** - Select to show the number of voters inside the chart bars, outside the chart (in chart labels), or both.

- **Legend Style** – numerical or by colors.

**Errors**

- Errors
- Show Errors

In this section you can choose to hide different errors from the users. Check this checkbox for debug purposes.
FAQ

What is the difference between the regular, out-of-the box WSS survey and Survey Plus?

Survey Plus provides many enhancements to provide an much easier survey interface. These enhancements include: resizable & customizable graphic interface and cross-site survey scoping.

Can I use Survey Plus for questionnaires/quizzes?

Yes. Version 2.1.00 includes a new "Quiz" mode that enables you to use this web part also for questionnaires.

What is the difference between "Survey" and "Quiz" modes?

"Quiz" mode enables users to save the current quiz state and later on continue working on it from the exact place they left it. Future versions will include the ability to Shuffle questions and provide marks.

Do I have to install anything on my company's client-PCs?

No. The KWizCom SharePoint Survey Plus Web Part is a server installation. Once installed on the server, it can be used from any client-PC connected to it.
Version Release Notes

<table>
<thead>
<tr>
<th>Primary Software</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>2.2.00</td>
</tr>
<tr>
<td>Base version</td>
<td>2.1.00</td>
</tr>
<tr>
<td>Release date</td>
<td>June-24-2009</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sub-Modules</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Module</td>
<td>Version</td>
</tr>
<tr>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Version History

<table>
<thead>
<tr>
<th>CR #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Version 2.2.00, June-24-2009</strong></td>
<td></td>
</tr>
<tr>
<td>141</td>
<td>Fixed Bug: Reader gets Access denied if survey list exists in another web site</td>
</tr>
<tr>
<td>146</td>
<td>Fixed Bug: an error when installing a version over a previous version</td>
</tr>
</tbody>
</table>

<p>| <strong>Version 2.1.00, April-12-2009</strong> | |
| 65   | Fixed Bug: No error message when typing wrong URL in the &quot;Survey List URL&quot; field or in &quot;Survey List Name&quot; field. |
| 103  | Support lookup field questions |
| 104  | Support branching |
| 108  | Support Firefox and Google Chrome |
| 110  | Added &quot;Quiz&quot; mode features: |
|      | 1. Enable breaking a survey into several pages by using page separator survey column. |
|      | 2. Add drop down property: |
|      |   a. “Survey type” - Survey/Quiz. |
|      |   b. Description for “Survey type” property. |
|      | 3. When selecting Quiz mode - added &quot;next/back/save and submit&quot; options on every page. |
|      | 4. Save option for logged-in and anonymous users that returns the user back to the last question upon return to the survey page. |
| 113  | Fixed Bug: Problem with transparent background in IE6 |
| 114  | Fixed Bug: Error rendering graph when amount of answers is more than 18 |
| 118  | Fixed Bug: Error submitting items when a survey is connected to a... |</p>
<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>126</td>
<td>Fixed Bug: Lookup question defined as mandatory is not validated as mandatory.</td>
</tr>
<tr>
<td>133</td>
<td>Fixed Bug: Problem return the web part in code using GetLimitedWebPartManager.</td>
</tr>
<tr>
<td>135</td>
<td>Fixed Bug: When submitting a survey with lookup field with multiple answers the WP fires an exception.</td>
</tr>
<tr>
<td>136</td>
<td>Show graph result as ALT text in graph image.</td>
</tr>
</tbody>
</table>

**Version 1.5.00, May-29-2008**

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>57</td>
<td>Fixed bug: Installation problem, if in the computer name there is special characters like '-' the setup fall.</td>
</tr>
<tr>
<td>97</td>
<td>Support textboxes and text areas.</td>
</tr>
<tr>
<td>98</td>
<td>Support Firefox.</td>
</tr>
<tr>
<td>99</td>
<td>Support rating scale field type.</td>
</tr>
<tr>
<td>100</td>
<td>Fixed bug: Cannot install the survey web part (WSS and MOSS), installation process is not completed.</td>
</tr>
<tr>
<td>101</td>
<td>Allow administrator to set a default view based on whether or not the user has voted the survey.</td>
</tr>
</tbody>
</table>

**Version 1.3.00, August-2007**

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Full support for IE6.</td>
</tr>
<tr>
<td>2</td>
<td>Added support for different types of answer selection displays (drop-down and checkboxes).</td>
</tr>
<tr>
<td>3</td>
<td>Added new chart types.</td>
</tr>
<tr>
<td>4</td>
<td>Added confirmation message, inside web part and on a different page.</td>
</tr>
<tr>
<td>5</td>
<td>Added support for URL redirection on submission.</td>
</tr>
<tr>
<td>6</td>
<td>Added support for customizable chart labels.</td>
</tr>
<tr>
<td>7</td>
<td>Added support for mandatory survey question responses.</td>
</tr>
<tr>
<td>8</td>
<td>Bug Fix: Chart scale is not in proportion to the number of submitted responses.</td>
</tr>
<tr>
<td>9</td>
<td>Bug Fix: In the charts, the labels are cut.</td>
</tr>
</tbody>
</table>
Technical Support

You can obtain technical support using any of the following methods:

The KWizCom Web site
The KWizCom website at www.KWizCom.com contains the most updated valuable information, including:

- Answers to frequently asked questions (FAQ's) about our products – usability and technical questions.
- Product updates, which provide you with bug fixes and new features.

The Web Form
For technical support through the Internet, please fill in our support web form on our web site