# How to create a WordPress survey

This set of instructions details one of WordPress's many forms: a survey. Follow the steps sequentially. Pay careful attention to Steps 4-6, as these steps are often difficult for users to locate on the dashboard. Alt text is available if needed.

#### Prerequisite Guide: Requesting a WordPress Plugin

- 1. Access WordPress dashboard.
- 2. Hover cursor over "Forms" (1) on left toolbar.
  - Click "New Form."



Figure 1

3. Type desired title of survey (2).

| Create a New Form                          | × |
|--|---|
| Form Title *<br>Survey<br>Form Description |   |
| This is a survey.                          |   |
|  |   |
| Create Form                                |   |
|  |   |



- 4. Access "Advanced Field" menu from toolbar on right side of dashboard.
  - Click "Survey" (3).

| Name             | Date            |
|------------------|-----------------|
| Time             | Phone           |
| Address          | Website         |
| Email            | File Upload     |
| CAPTCHA          | List            |
| Consent          | Chained Selects |
| Poll             | 3 Quiz          |
| Survey           | Nested Form     |
| Terms of Service | Unique ID       |

5. Click cursor over downward-facing arrow to right of "Survey: Field ID" title (4).

| ể Edit 🗘             | Settings 🔎        | ) Entries | OPrevie | w 🕙 Live | Preview | JE L |
|----------------------|-------------------|-----------|---------|----------|---------|------|
| rvey : Field ID 2    | 2                 |           |         | 1        | C       |      |
|                      |                   |           |         |          |         |      |
| ntitled Survey       | Field             |           |         |          |         |      |
| Strongly<br>disagree | Field<br>Disagree | Neu       | utral   | Agree    | Strong  | gly  |

Figure 4

• Click arrow to expand survey editing options. **Note:** The resulting menu will appear as follows:

| III] Events  | Survey : Field ID 2  | 2          |          |        | 22                |
|--|----------------------|------------|----------|--------|-------------------|
| 🖓 Media  | Untitled Survey      | Field      |          |        |                   |
| Forms  | Strongly<br>disagree | Disagree   | Neutral  | Agree  | Strongly<br>agree |
| Forms<br>New Form  | 0                    |            |          |        |                   |
| Entries  | General              | Appearance | Advanced | Perks  |                   |
| Perks<br>Email Users   | Description          | 0          |          |        |                   |
| Settings   |                      |            |          |        |                   |
| Import/Export  |                      |            |          |        |                   |
| System Status<br>Help  | Survey Ques          | tion ©     |          |        |                   |
| ∞ Workflow   | Untitled Su          | rvey Field |          |        |                   |
|  | Concern Field        | Tupe 🕀     |          |        |                   |
| Pages  | Survey Field         | the of     |          |        |                   |
| <ul><li>Pages</li><li>Comments</li></ul>   | Likert               | ~          |          |        |                   |
| <ul> <li>Pages</li> <li>Comments</li> <li>TablePress</li> </ul>                  | Likert<br>Columns @  | ~          |          | Enable | Scoring @         |
| <ul> <li>Pages</li> <li>Comments</li> <li>TablePress</li> <li>Genesis</li> </ul> | Likert<br>Columns @  | v disagree |          | Enable | Scoring @         |

Figure 5

- 6. Customize survey.
  - Type description of survey under "Description" section.

| General         | Appearance | Advanced | Perks |
|-----------------|------------|----------|-------|
| Description @   | )          |          |       |
| This is a surve | ey.        |          |       |
|                 |            |          |       |
|                 |            |          |       |

#### Figure 6

• Type first survey question under "Survey Question" section (5).





• Add another question by repeating step 4.

7. Save survey at any time during progress.

• Click "Post Fields" (6) on right side of main dashboard.

|  | 7              |   |
|--|----------------|---|
| Single Line Text   | Paragraph Text |   |
| Drop Down  | Multi Select   |   |
| Number   | Checkboxes     |   |
| Radio Buttons  | Hidden         |   |
| HTML   | Section        |   |
| Page   | 6              |   |
|  |                |   |
| Advanced Fields 🤅  | . / .          |   |
| Advanced Fields €<br>EWU Form Fields   |                |   |
| Advanced Fields @<br>EWU Form Fields<br>Post Fields @                                  |                | > |
| Advanced Fields ©<br>EWU Form Fields<br>Post Fields ©<br>Pricing Fields ©              |                | > |
| Advanced Fields<br>EWU Form Fields<br>Post Fields<br>Pricing Fields<br>Workflow Fields |                |   |

Figure 8

• Click blue "Update" button (7).

| Title             | Body       |   |
|-------------------|------------|---|
| Excerpt           | Tags       |   |
| Category          | Post Image |   |
| Custom Field      |            |   |
| Pricing Fields @  |            |   |
| Workflow Fields @ |            | 3 |
| GravityView ©     | .7         | - |
|                   |            |   |

Figure 9

### 8. Publish survey.

• Click "Create A View" (8).



Figure 10

• Click "Publish" (9).



The survey is now complete and published. Refer back to these instructions whenever necessary for creating surveys in the future.

## Alt Text Table: Creating a Survey in WordPress

| Figure Number | Alt Text Title               | Alt Text  |
|---------------|------------------------------|---|
| Figure 1      | Clicking "New Form"          | The left side of the dashboard<br>is shown, with the "Forms"<br>drop down menu open. The<br>"New Form" tab is<br>highlighted. |
| Figure 2      | Titling Survey               | The "Create a New Form" tab<br>is open, indicating that the<br>user should title their survey.                                |
| Figure 3      | Beginning Creation of Survey | The "Advanced Fields" menu<br>is shown, with the "Survey"<br>button highlighted.  |
| Figure 4      | Expanding Creation Options   | The survey field menu is<br>shown. To the right of<br>"Survey: Field I.D. 2," the<br>downward facing arrow is<br>highlighted. |
| Figure 5      | Survey Creation Menu         | The editing template for creating a survey is shown.  |
| Figure 6      | Describing Survey            | The general description text<br>input box is shown on screen,<br>indicating the user should<br>describe their survey.         |
| Figure 7      | Creating Survey Questions    | The "General" tab is open<br>under the survey creation<br>menu, with the "Survey<br>Question" text input box<br>highlighted.  |
| Figure 8      | Saving Progress: Action 1    | The right side of the main dashboard is shown, with the   |

|           |                             | "Post Fields" button<br>highlighted.  |
|-----------|-----------------------------|---|
| Figure 9  | Saving Progress: Action 2   | The blue "Update" button at<br>the bottom of the right side of<br>the main dashboard is<br>shown. |
| Figure 10 | Publishing Survey: Action 1 | The main survey dashboard<br>is shown, with the "Create a<br>View" button highlighted.            |
| Figure 11 | Publishing Survey: Action 2 | The "Publish" menu is shown,<br>with the "Publish" button<br>highlighted.                         |