

Create Class Surveys with Excel

By Lorrie Jackson

WHY A TECHTORIAL?

What will I learn today?

You'll learn how to create classroom or school surveys using Microsoft Excel.

What hardware and/or software does the techtorial apply to?

The techtorial applies to Microsoft Excel.

Which National Educational Technology Standards for Teachers does the techtorial address?

The techtorial will help teachers accomplish standard V.D. in particular.

The International Society for Technology in Education (ISTE) has developed a set of National Educational Technology Standards for Teachers. Standards or Performance Indicators are included for each techtorial to help teachers and administrators improve technology proficiency. For a complete description of the standards indicated, go to [NETS for Teachers](#).

CREATE CLASS SURVEYS USING EXCEL!

Let's say your school is starting a wellness campaign and you want to know how many hours a week students exercise. It's a short and simple survey and you don't want to use an online tool. You could type the questions and print them for parents or students to fill out. But, you get the responses back and, while a number of students have answered, "0 hours," what you actually see on paper are responses like:

- None
- Are you kidding me?
- Nada
- Zero, zilch, zip!

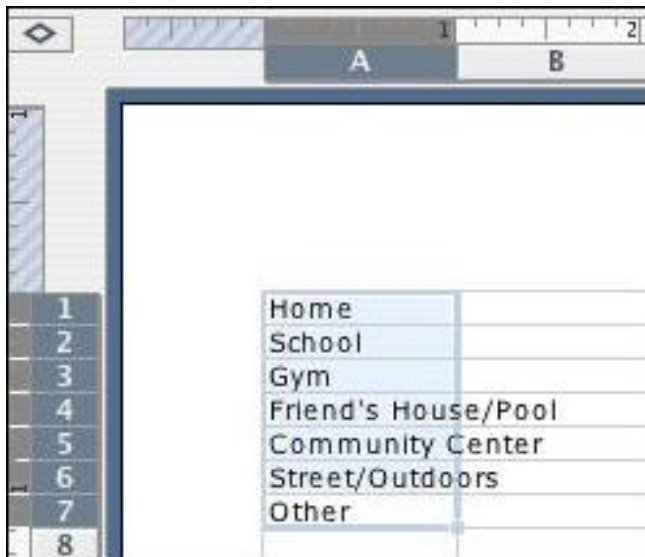
Next time, consider using Excel's Data Validation feature. Respondents receive instructions on how to select an answer; they choose from a set list of answers, and they get an error message if they try to stray from the list. Data Validation is not as scary as it sounds; you can create a survey in only three short steps!

Note: This techtorial assumes basic Excel skills. If you are new to Excel, check out the [Teaching Excel](#) techtorial as well as any others in the Excel section of the [TechtorialTableofContents](#) (scroll to the bottom of the article).

STEP ONE: CREATING THE ANSWER LIST

For the purposes of this tutorial, we'll create a survey about exercise habits, but you can choose another topic if you prefer. To begin your survey:

- Open Excel.
- At the bottom of the spreadsheet window, *right-click* the Sheet2 tab, and then click Rename. Rename the tab "Lists."
- *Right-click* the Sheet1 tab, click Rename, and rename the tab "Questions."
- Click the "Lists" tab (formerly Sheet2) and type the following possible answers into the corresponding cells:
 - A1 = Home
 - A2 = School
 - A3 = Gym
 - A4 = Friend's House/Pool
 - A5 = Community Center
 - A6 = Street/Outdoors
 - A7 = Other
- Highlight cells A1 to A7. (This is called a range).
- Click View>Formula Bar. In the blank to the left of the formula bar blank, type WhereList. This is the blank highlighted in blue in the screenshot below.



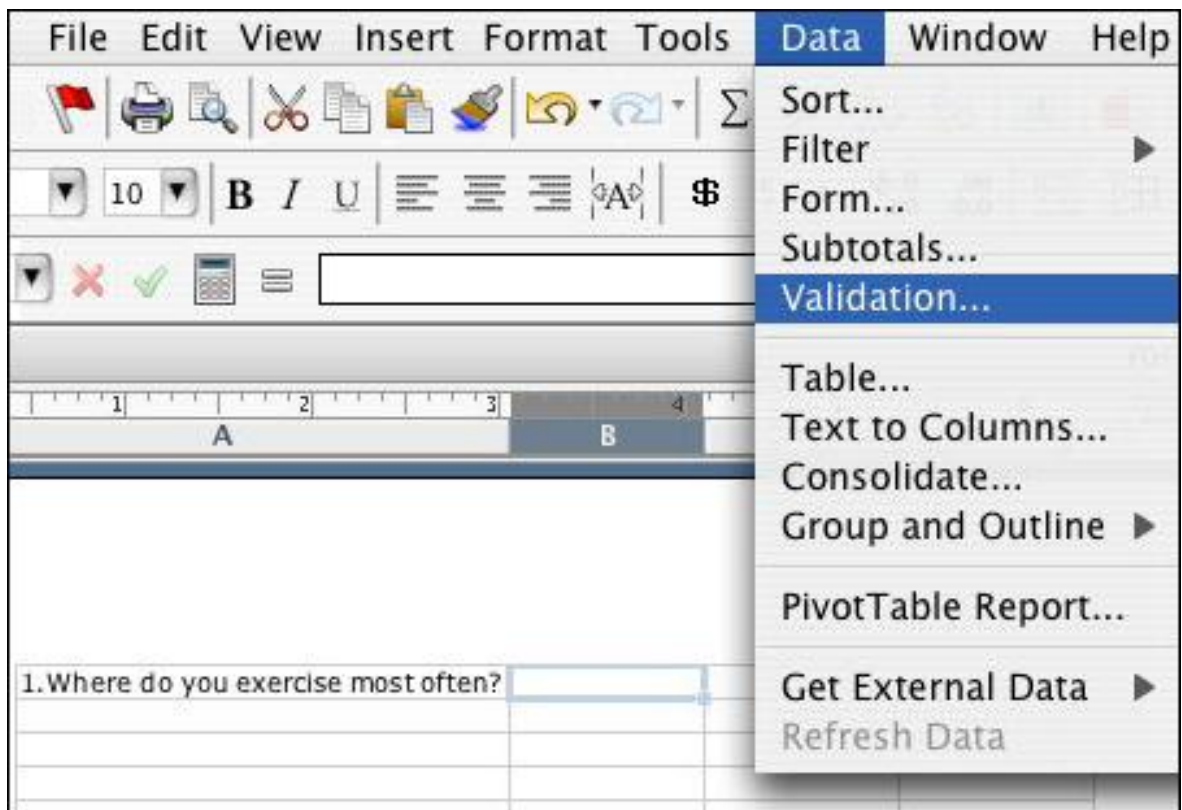
We've called this the Where List because it is a list of the possible places students might exercise.

Save your work.

STEP TWO: CREATING THE QUESTION AND DATA VALIDATION SETTINGS

Next, we need to create the survey question and validation criteria for the answers. To do that:

- Click the tab marked "Questions" (formerly Sheet1) at the bottom of the worksheet.
- In Cell A1, type the question, "Where do you exercise most often?"
- Increase the size of column A to fit the question. (Double-click the tiny line between the A and B column headers.)
- Click Cell B1, and then click Data>Validation.



- Click the Settings tab. That tells Excel what type of data you want in this cell -- in this case the list we typed above. So, choose "List" from the Allow menu and type "=WhereList" in the Source blank. (See the screenshot below.)

Data Validation

Settings | Input Message | Error Alert

Validation criteria

Allow: Ignore blank
 List In-cell dropdown

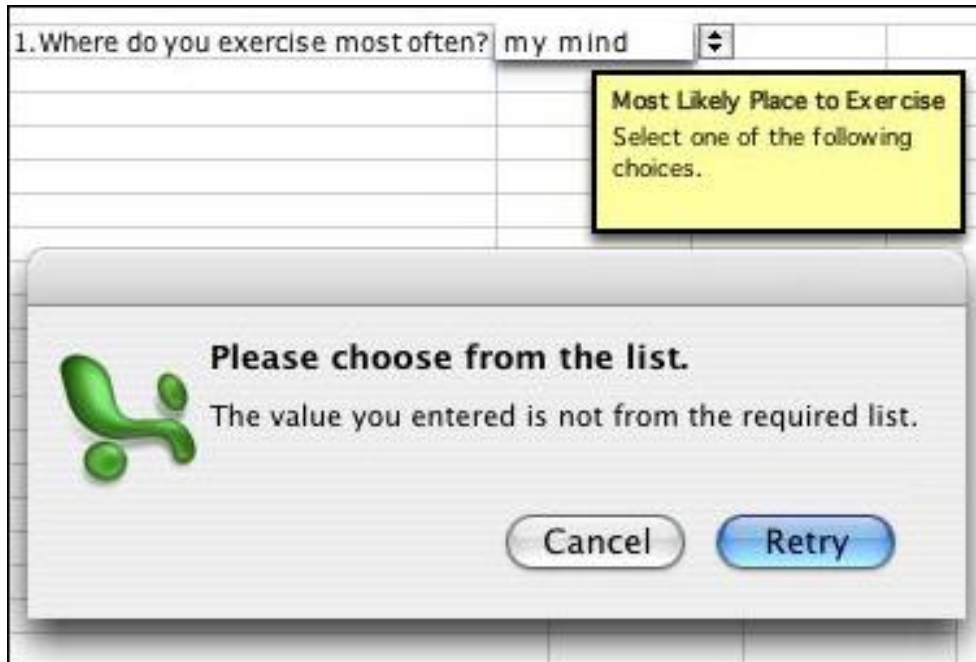
Data: between

Source: =WhereList

Apply these changes to all other cells with the same settings

Clear All Cancel OK

- Click the Input Message tab/button. That tells Excel what message you want to pop up when respondents get to the question, "Where do you exercise most often?" You can leave the area blank or enter a title (such as "Most Likely Place to Exercise") and an Input Message (such as "Please select one of the choices below."). If you don't think your respondents need a prompt, you can omit it.
- Click the Error Alert tab/button and type in the Title blank, "Please choose from the list." You can leave the text area blank if you want to.
- You now can see your input message, and up and down arrows to the right of cell B1. That is where respondents will find the list of possible answers. Click an arrow to see the list appear. (Try typing a wrong answer ("my mind," for example) to see the error alert pop up.



Repeat Steps 1 and 2 for each question on your survey. (Limit the survey to 5 questions or fewer.) Note that you can put lists anywhere on the Lists worksheet. They do not have to be next to each other, so spread them out.

Don't forget to save your work!

STEP 3: POLISHING AND PUBLISHING!

You might want to improve the look of your survey by adding a header (a title that appears above the first question). To do that, click View>Header and Footer>Customize Header, and then add whatever title you'd like. You also can do other formatting, such as font changes, inserting images and shapes, and so on. If you want the names of your survey respondents, you'll also need to add that question to your survey. (Although there's no need for a Data Validation step for that one!)

When you're finished editing your survey and are ready to administer it, click File>Save As, and change the file type (or format) option to Template. That will "lock" your original file so your lists or questions cannot be changed.

To administer the survey, you now can send it out via e-mail, save it on the server, or just load it onto school computers from disks. Respondents then can open the file, complete the survey, print the Questions worksheet or save it as a new file, and return it to you.

TELL ME MORE!

Where can I find more information?

For more ideas on using Excel in your classroom, see the Excel section of the Education World [Techtorial Table of Contents](#).