class apps

Select Survey .NET

v5

Basic Training

SelectSurvey.NET Basic Training

v.5.0 6/2019

In this course, students will learn all the basic functionality of SelectSurvey.NET including creating surveys, deploying surveys and viewing reports.

Contents

Getting Around the Application

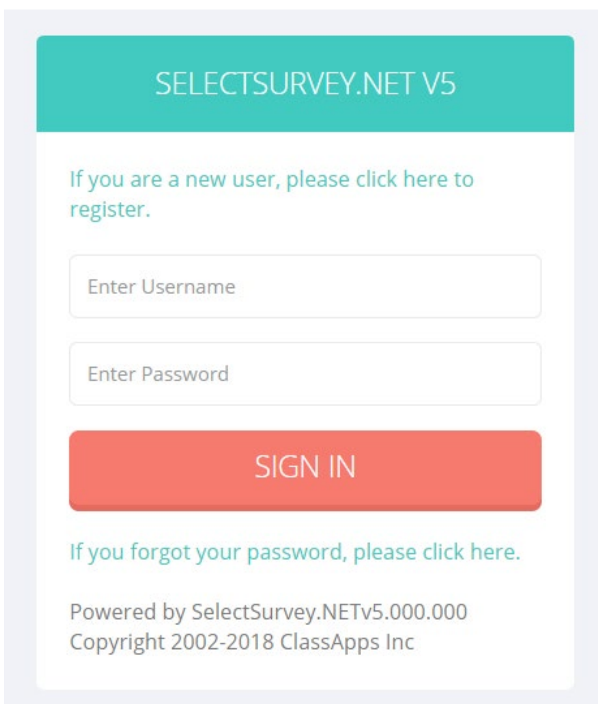
Login

Using an internet browser or mobile device, click on or enter the URL link provided by your company or organization to login. You should see a login page that looks like the image below.

The login page is 100% customizable so your login page may look different than this. The login page can be customized by an admin user via the admin tools. Normally this is configured during the initial installation or account setup. If you need help configuring the look and feel of the application, ClassApps has designers that can help you by designing the login page and survey look and feel templates to match your organization's branding. For more information, email sales@classapps.com or tech@classapps.com.

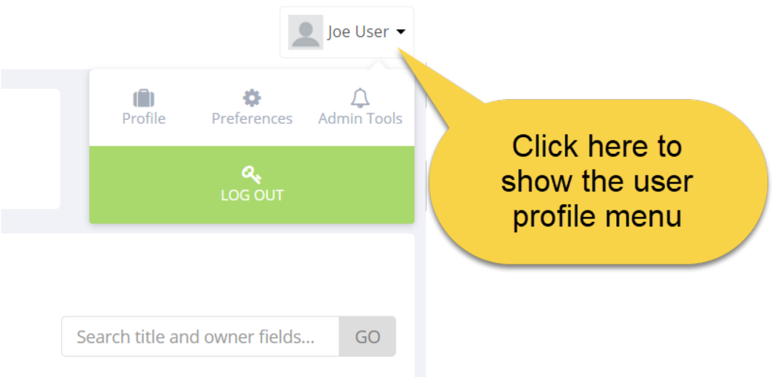
In addition to customizing the look and feel of the login page and other pages in the application, admin users can also customize the text that shows on the forms as well as the text in any pop up or on page validations that appears on the pages. Text can be edited from the admin tools – Globalization and Translation pages by an admin user.

Companies have the ability to hide the registration link and the forgot password link from admin tools > application wide settings.



Logout

Remember to click Logout when you are finished. Click your name in the upper right corner then click the green “Logout” button.



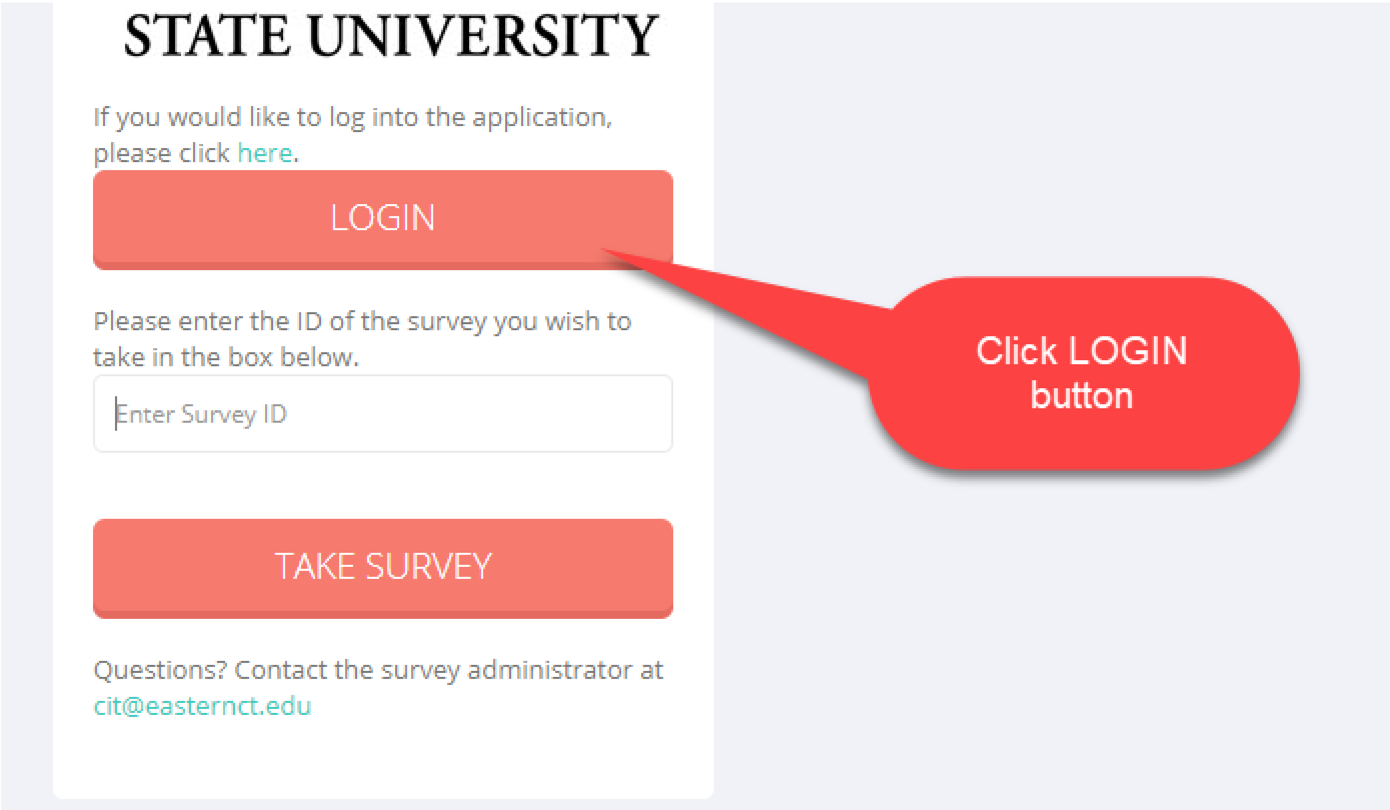
Changing your Password

Your password must be 8 or more characters long and contain at least one lowercase letter, one uppercase letter, AND one symbol OR number.

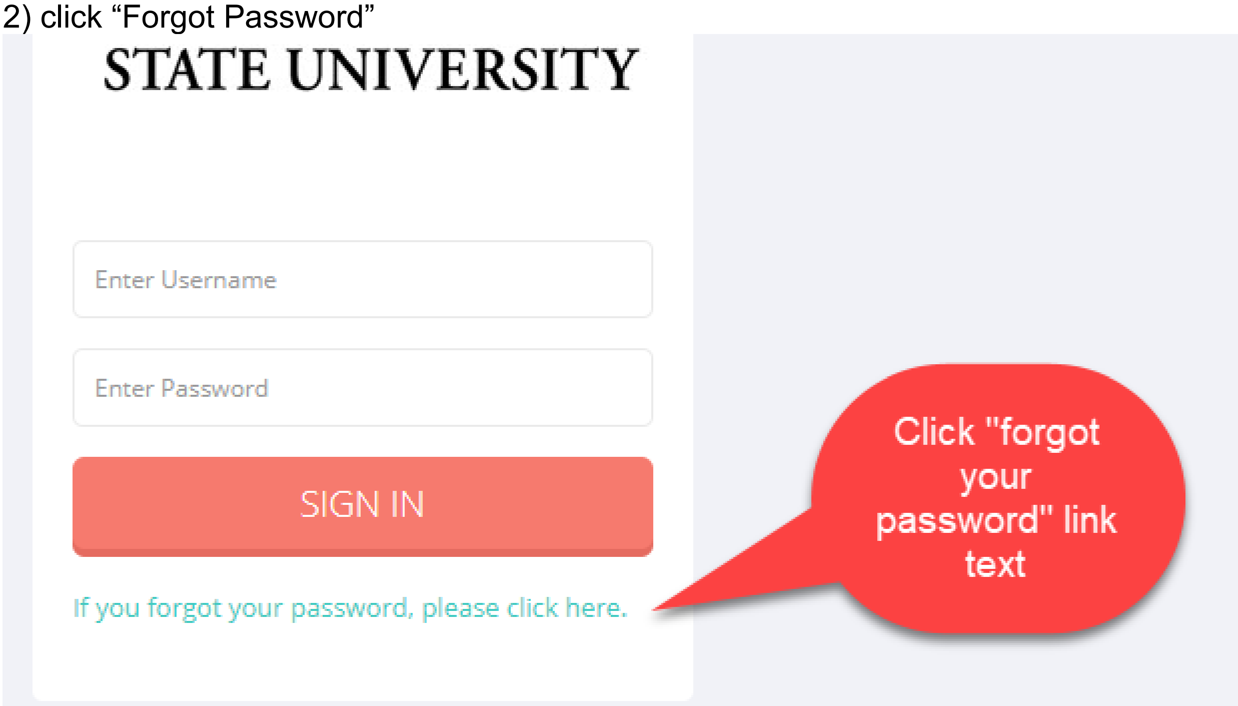
1) Check your email for the verification code and enter it in the box

Password Requirements:
1) must be 8 or more characters long
2) must contain at least one lowercase letter
3) must contain at least one uppercase letter,
4) must contain at least one symbol (!,@,#,$,%,^,&,*,?,_,~,-,£,(,)) OR number.
5) You cannot reset your password with your last/current password.

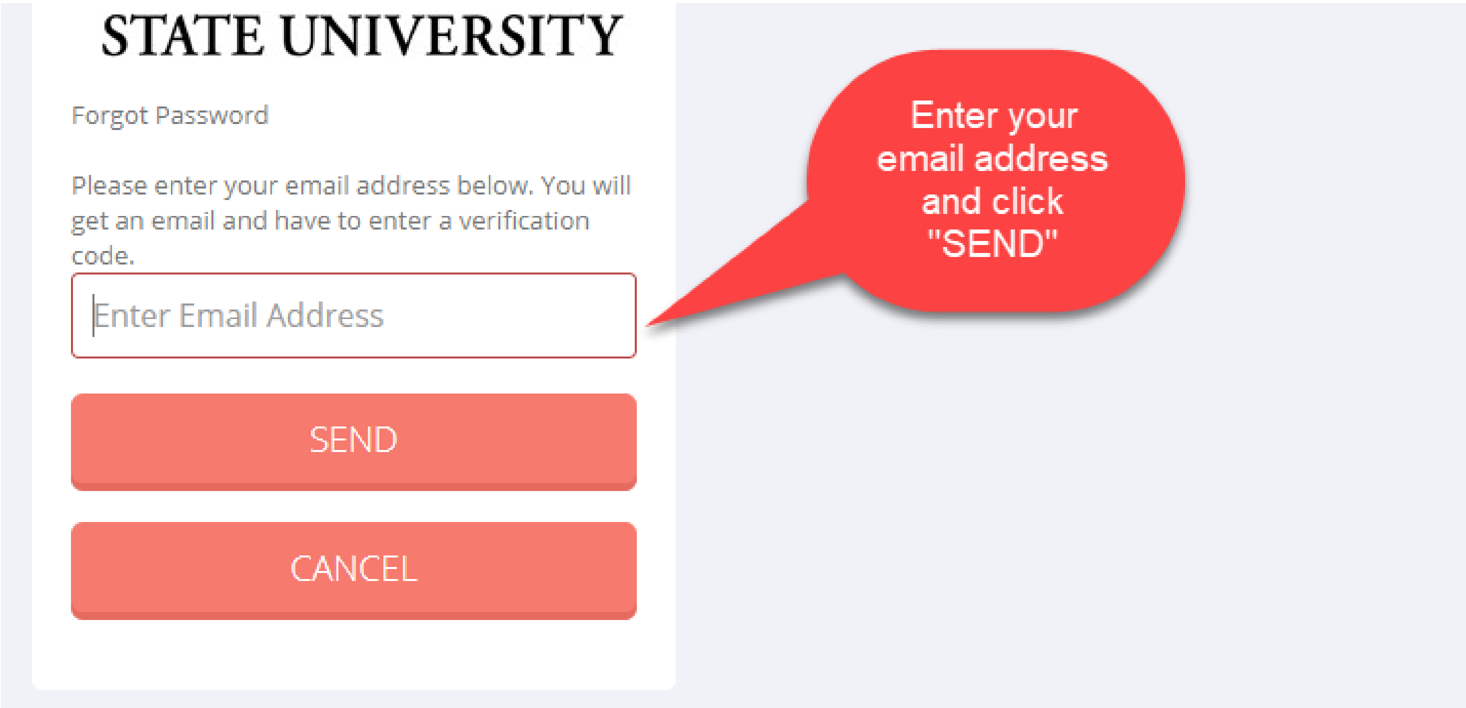
Steps with screenshots:
1) Click LOGIN button



2) click “Forgot Password”

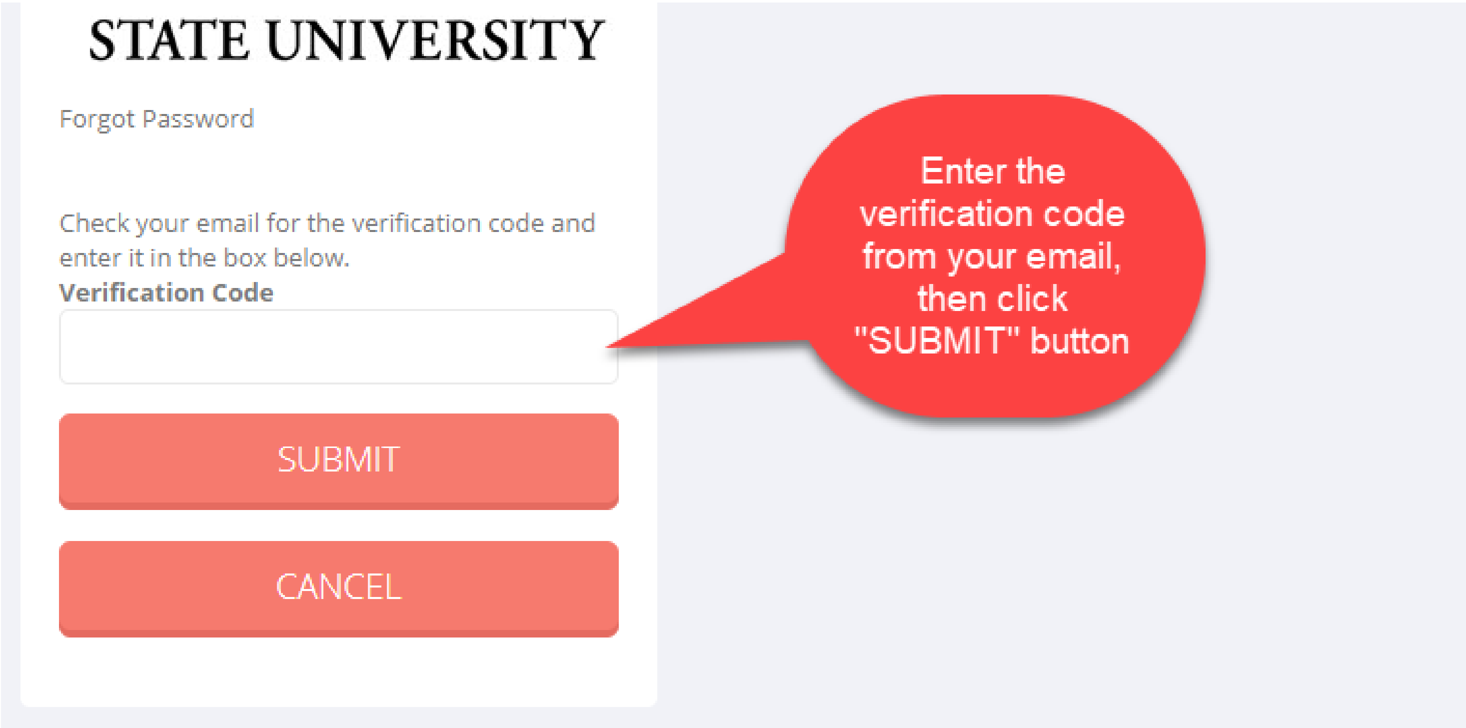


3) Enter your email address in the box and click “SEND”

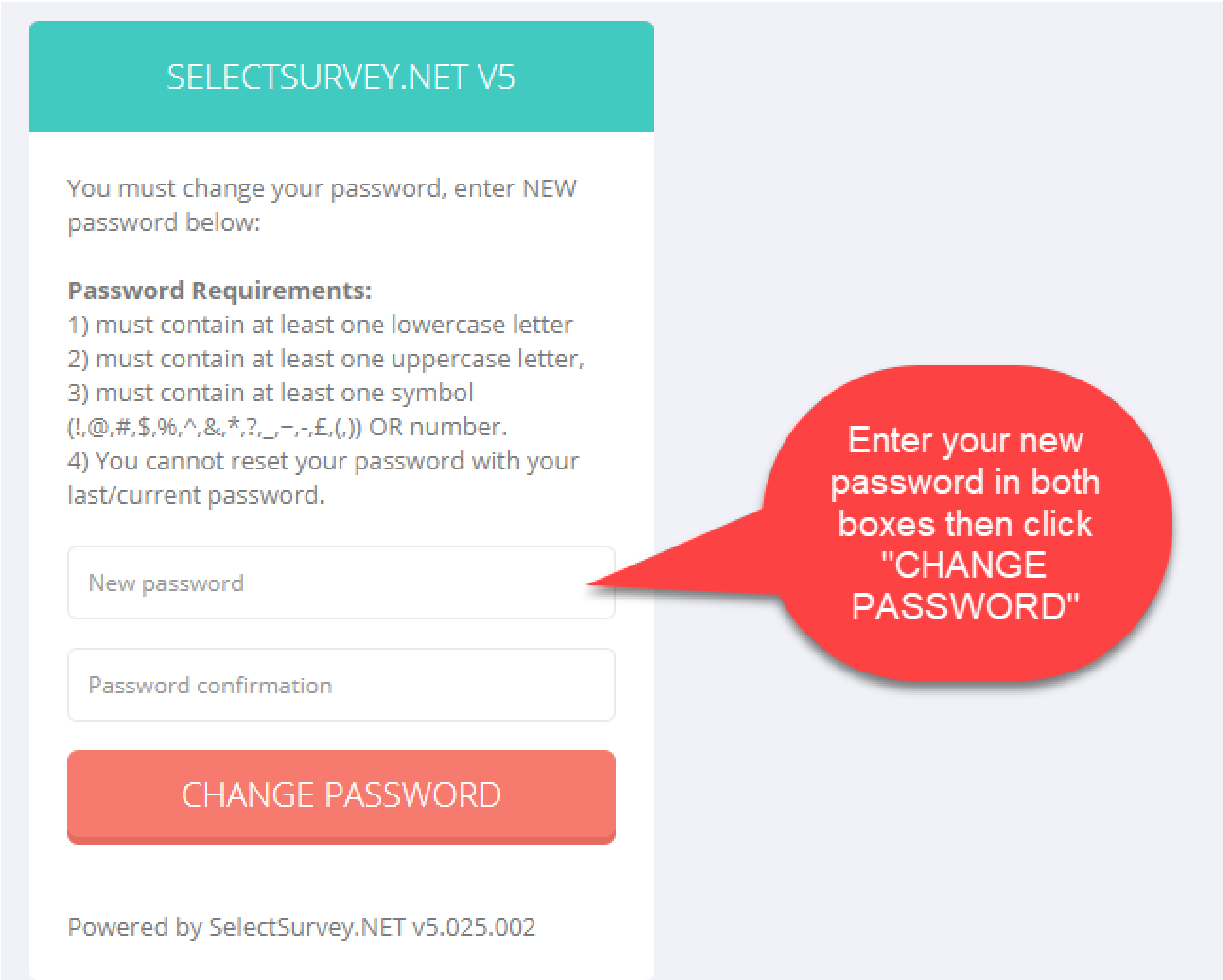


4) Open your email and copy the verification code that was sent to you.

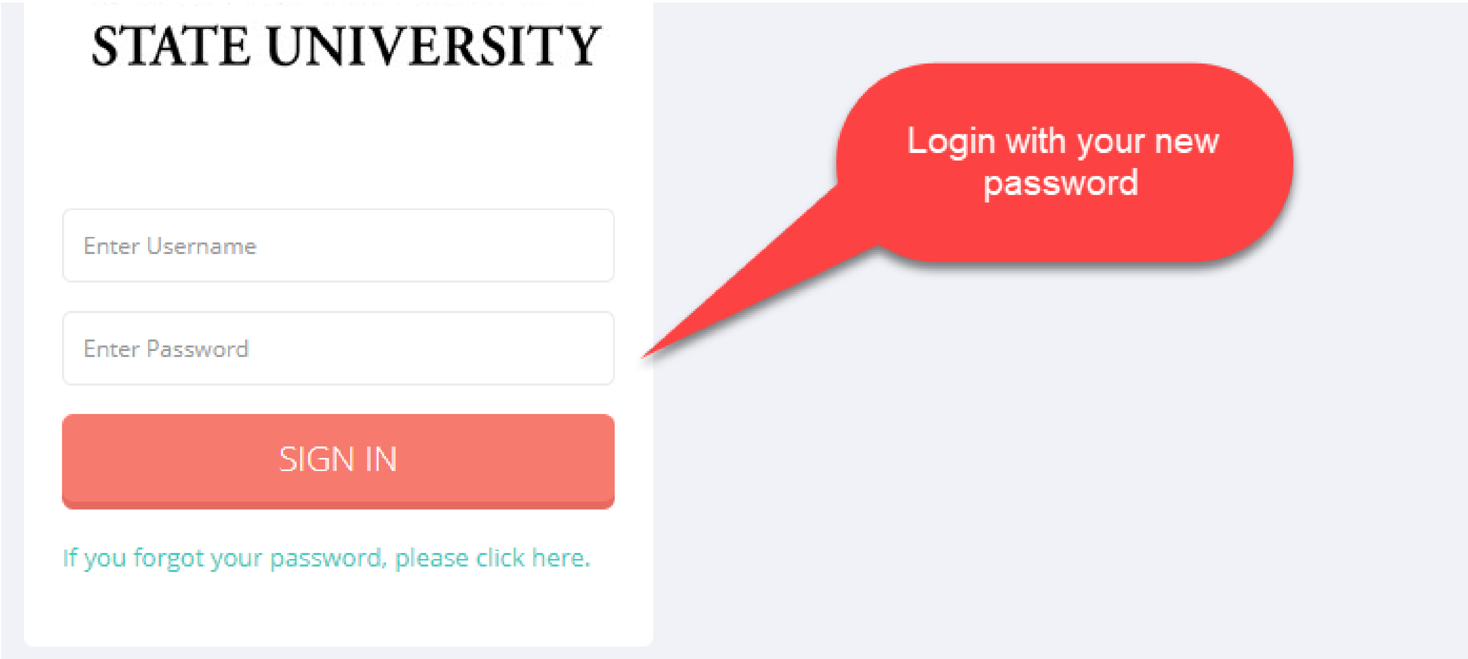
5) Right click in the box and paste in your verification code then click “SUBMIT”



5) Enter your new password in both boxes. Make sure it meets all of the password requirements, and cannot be your past password.



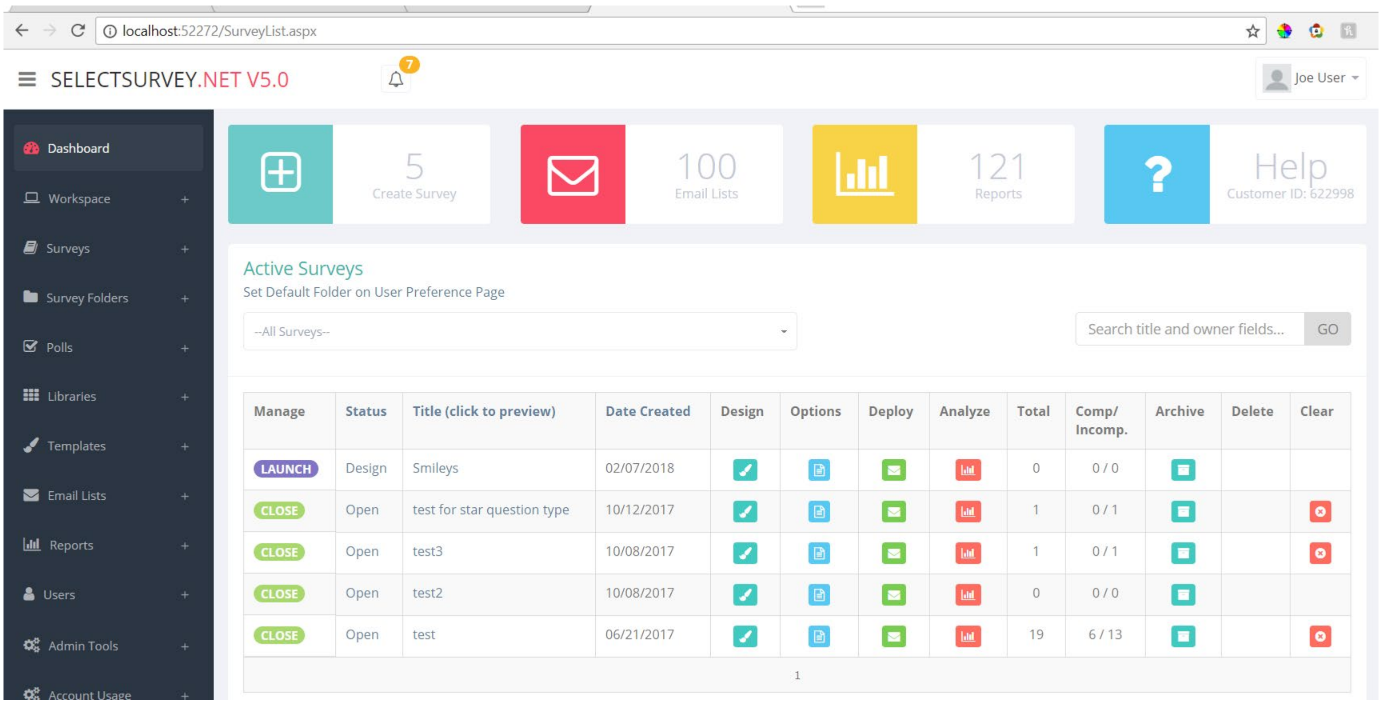
6) Login with your new password



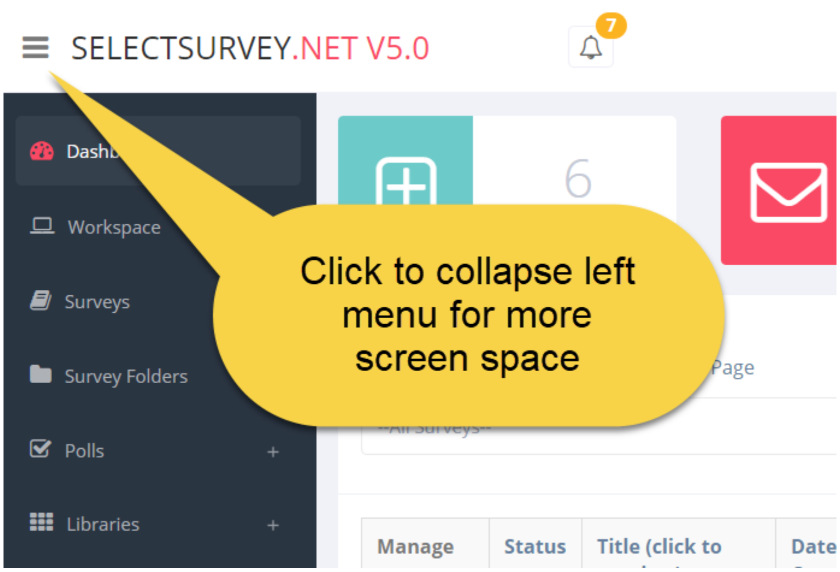
Dashboard

The below image is the Survey List Dashboard window that you will normally see right after logging in. Eventually you will see all of your surveys listed here.

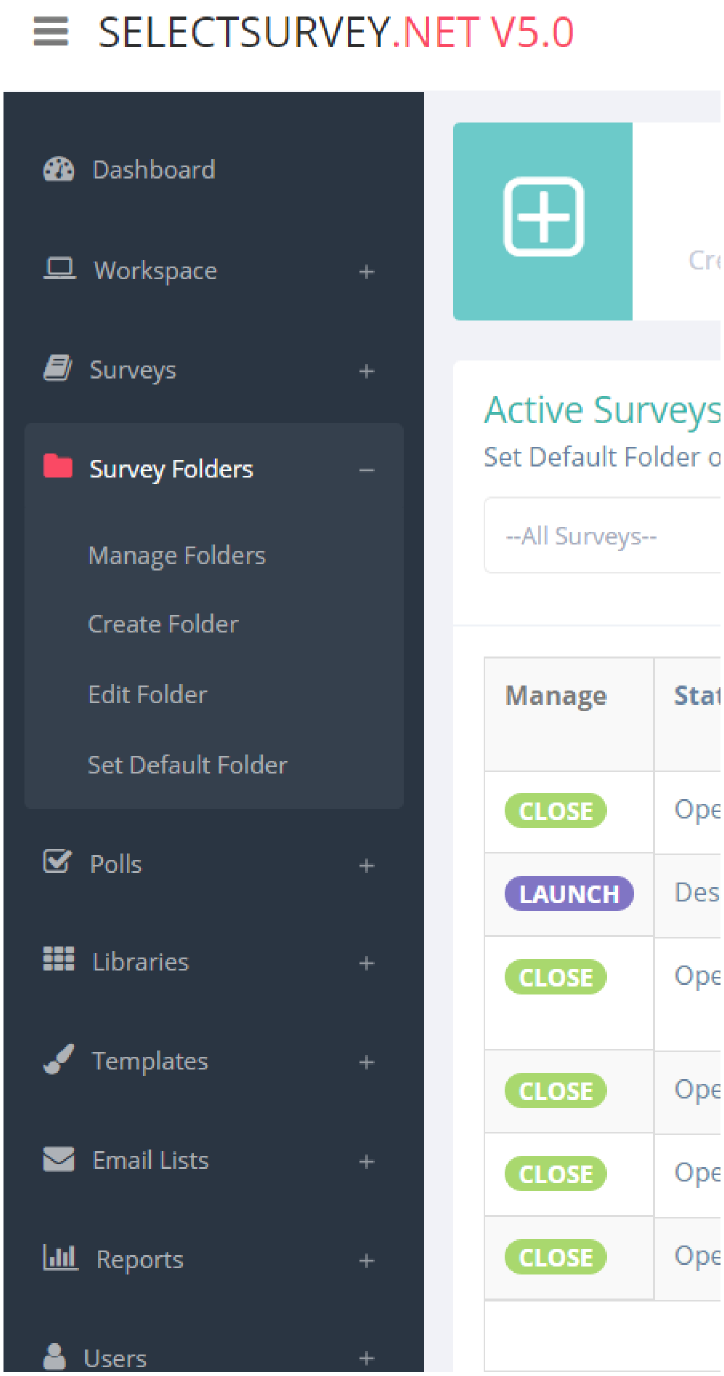
The large icons at the top of the page are clickable, click the large plus sign to start creating your first survey. Click the large question mark for help.



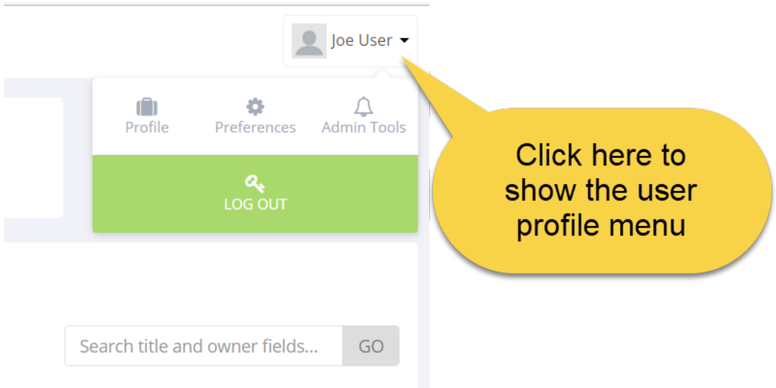
To collapse the left menu, click the menu icon as shown below:



To get to any page click the text links in the left menu. You can expand the folders in the left navigation as shown below by clicking on them.

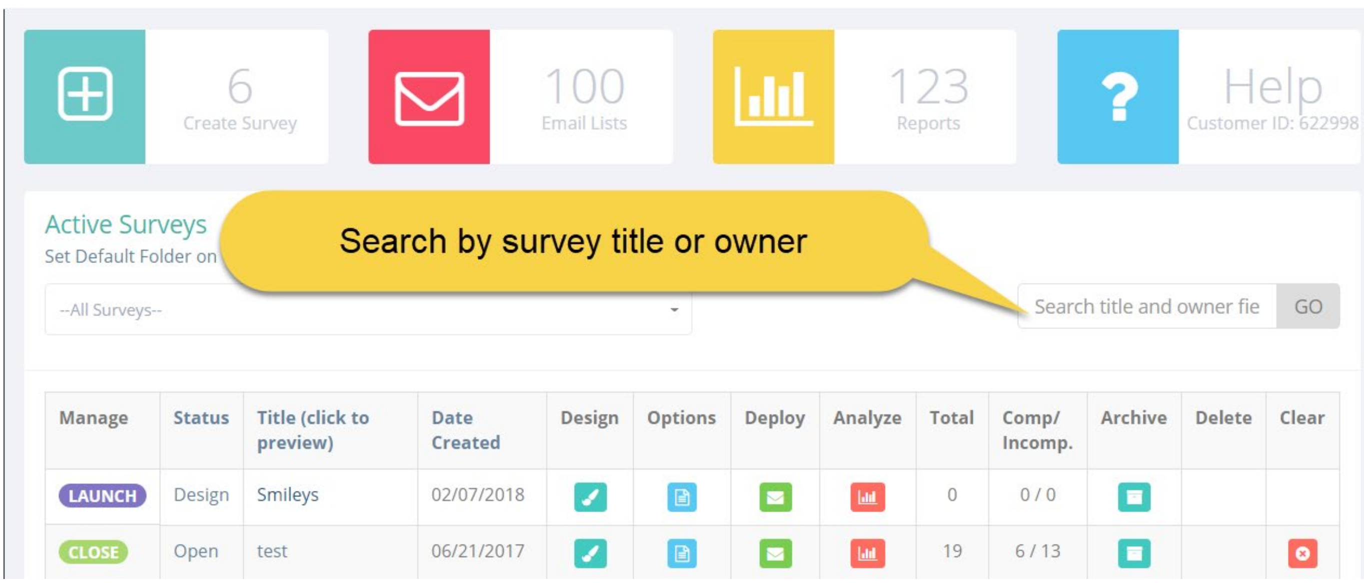


In the right hand corner you will see the name of the person logged in. If you click the dropdown next to your name, you will see a menu containing a link to edit your profile, user preferences and to logout. If you are an admin user you will also have access to the admin tools.



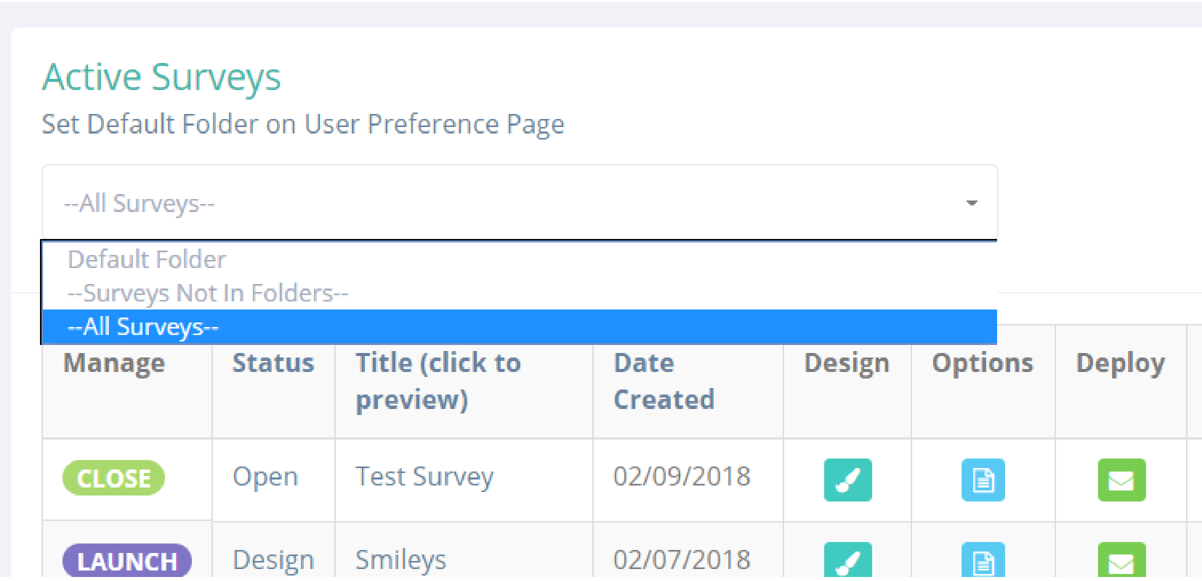
To search for a survey:

- From the **Manage Surveys** page type a survey's name or owner in the search bar and click **go**.



To access all surveys in a folder:

- From the **Manage Surveys** page click the dropdown arrow in the **Browse Survey Folders** field and select the folder
- Click **Go**



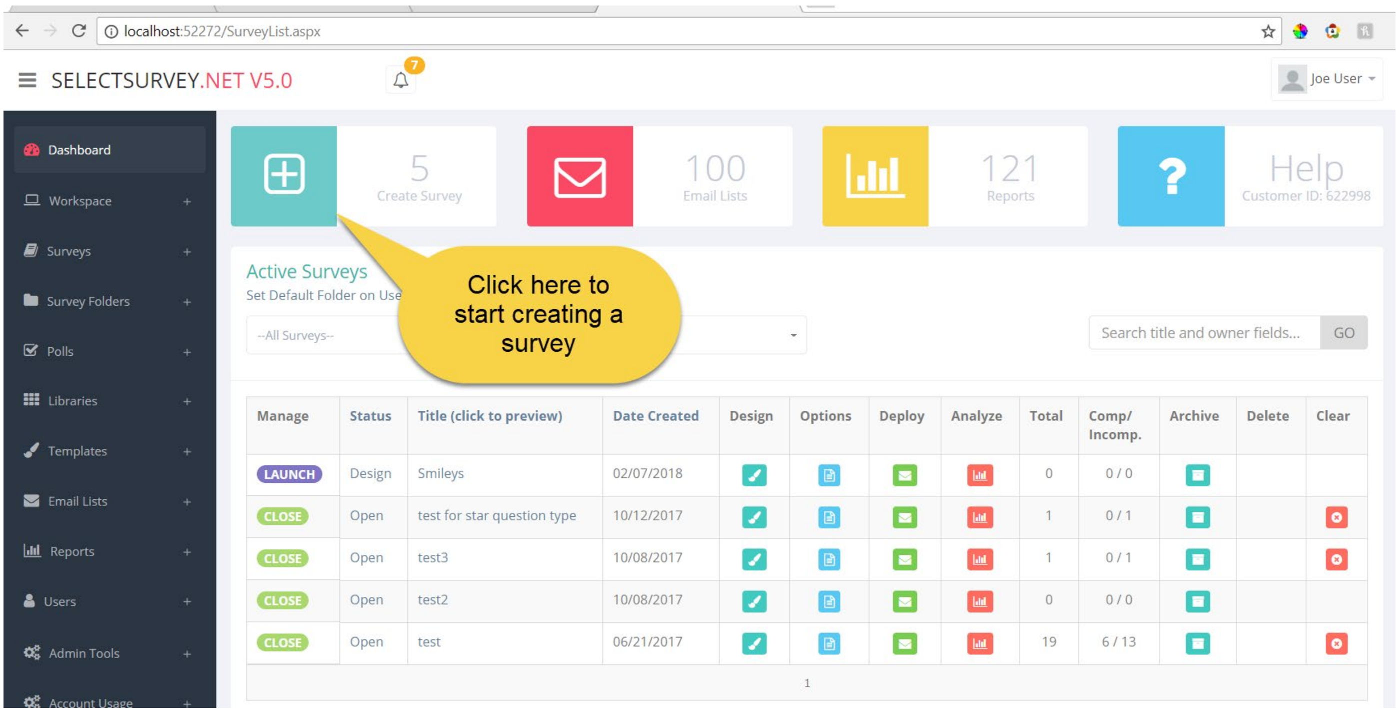
Creating Surveys

You can create surveys from scratch, or from copies of other surveys. When you create a survey from a copy of an existing survey, you can also copy the responses as well. Copying surveys with responses is a great way to backup a survey and save those responses, and to redeploy the original as an updateable 360 survey so the respondents can update their responses from the prior quarter, or year.

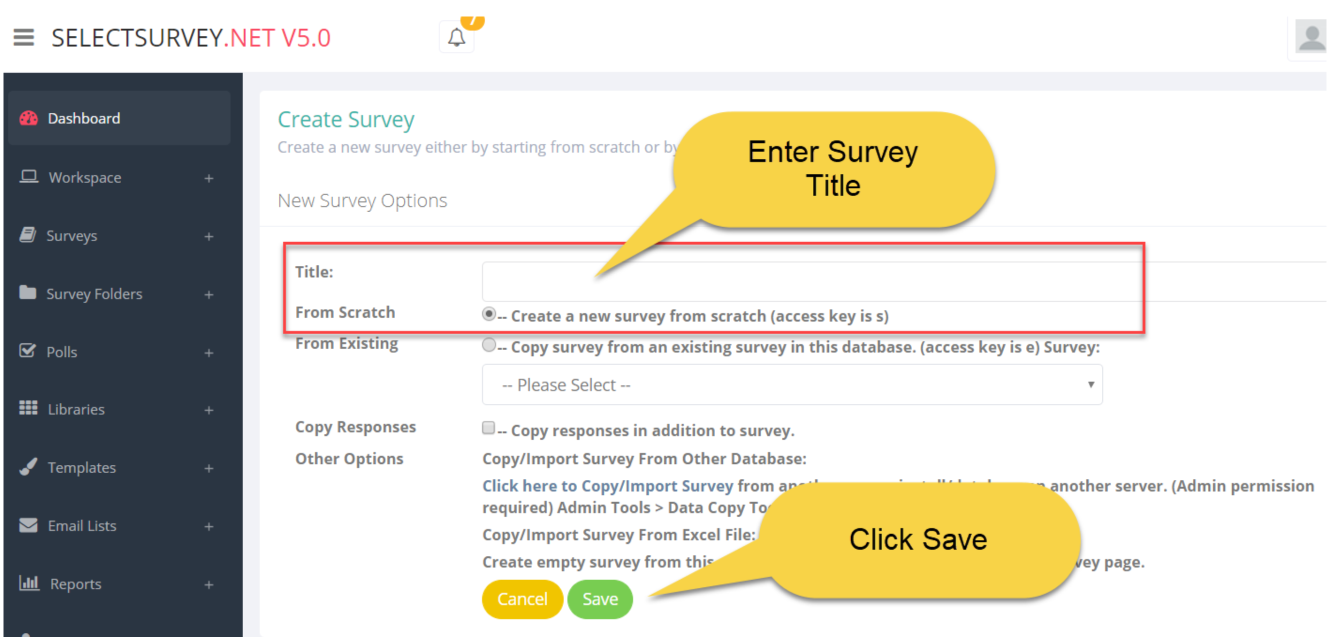
With only one click you can copy a survey and then launch it. There is an also an option to import questions from Excel into your new empty survey.

Create a Survey from Scratch

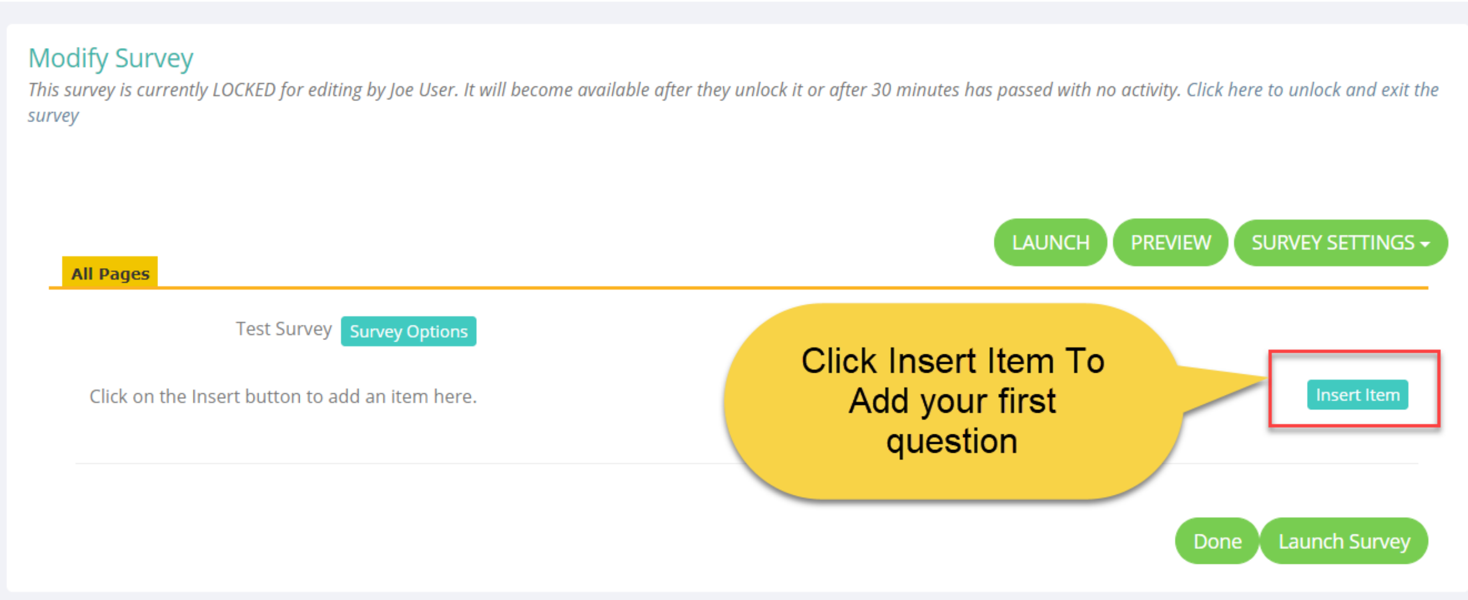
You will have to create your first survey from scratch. Once you have a survey created you can use it to create more surveys.



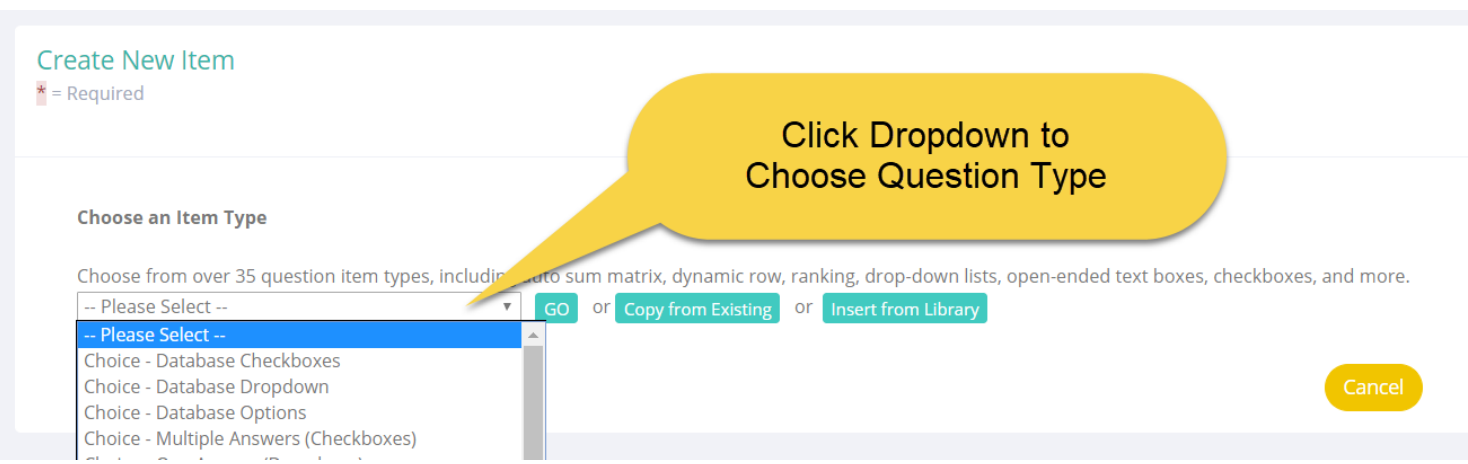
Enter the survey title, check “From Scratch” radio button, then click “Save”.



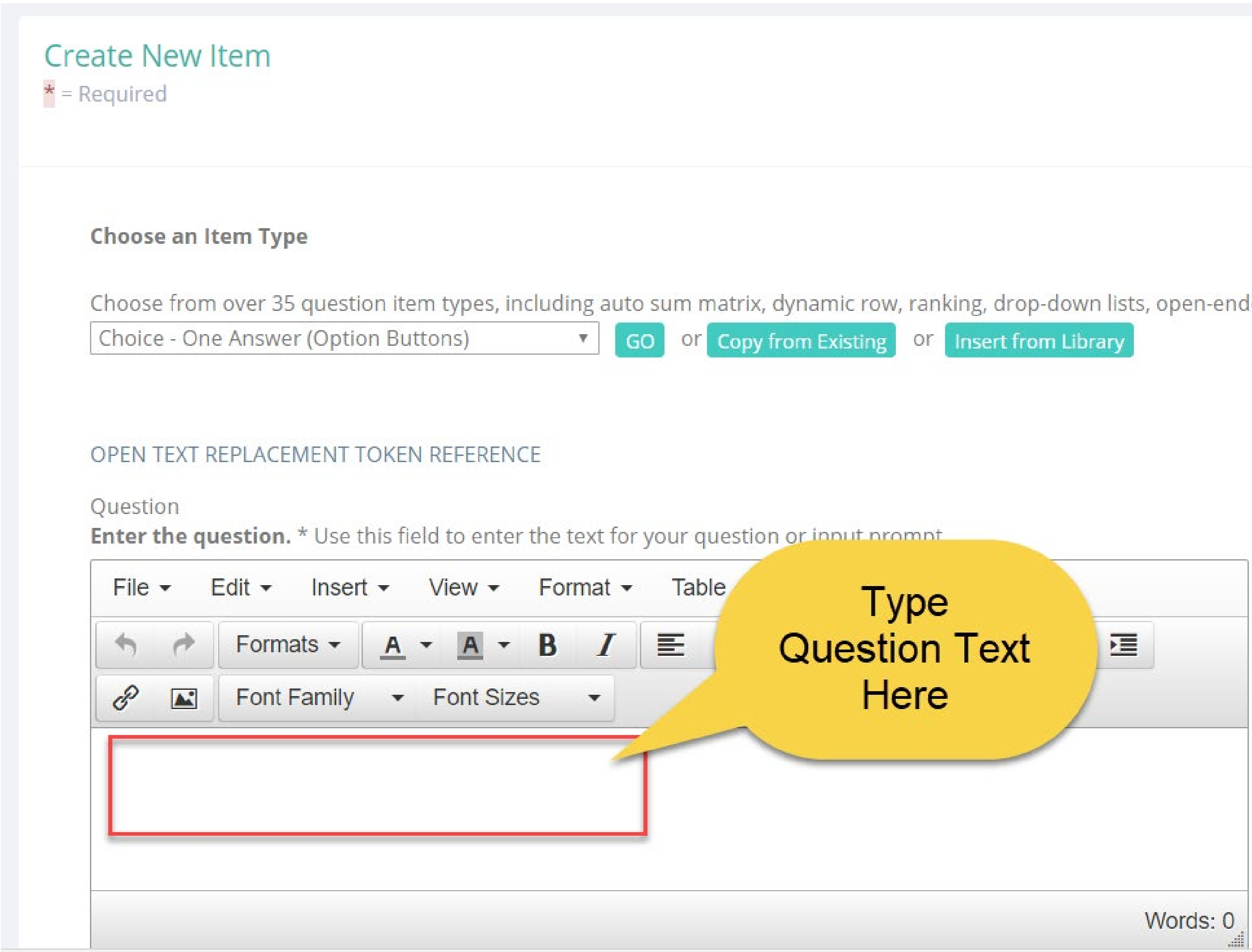
After you click “Save” you will see the “Modify Survey Page” shown below.
Click the “Insert Item” button to add your first question to the survey.

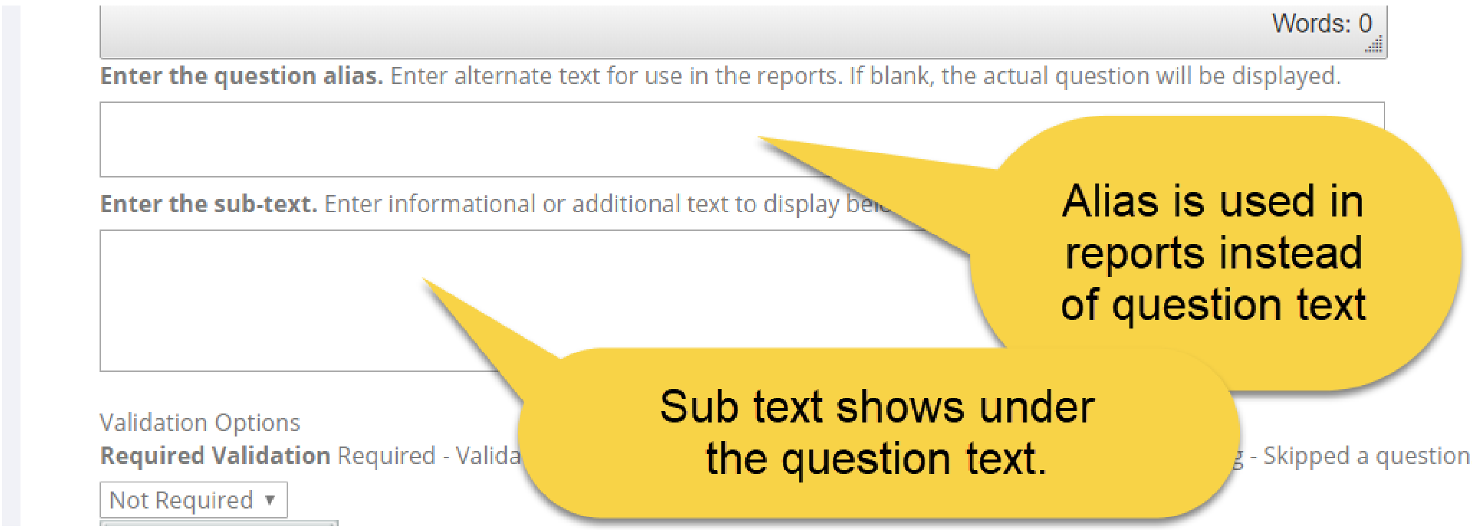


On the “Create New Item” page you first choose a question type from the dropdown.
The dropdown holds all of the different question types.
Note that each question type has multiple formatting options once you add it to the survey.
Selecting an item from the dropdown will display your options for adding that item.
You can also copy an item you already added, or choose an item from a library.

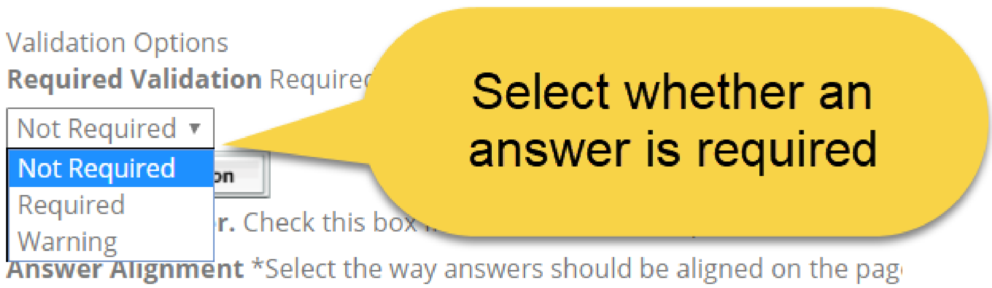


For instance, here we chose **One Answer (Option Buttons):**


Create New Item
* = Required
Choose an Item Type
Choose from over 35 question item types, including auto sum matrix, dynamic row, ranking, drop-down lists, open-ende
Choice - One Answer (Option Buttons)
GO
or
Copy from Existing
or
Insert from Library
OPEN TEXT REPLACEMENT TOKEN REFERENCE
Question
Enter the question. * Use this field to enter the text for your question or input prompt
File
Edit
Insert
View
Format
Table
Formats
Font Family
Font Sizes
Type Question Text Here
Words: 0



Select whether the answer is required or not from the drop down.



As you progress down the page – you will also see options for horizontal or vertical display.

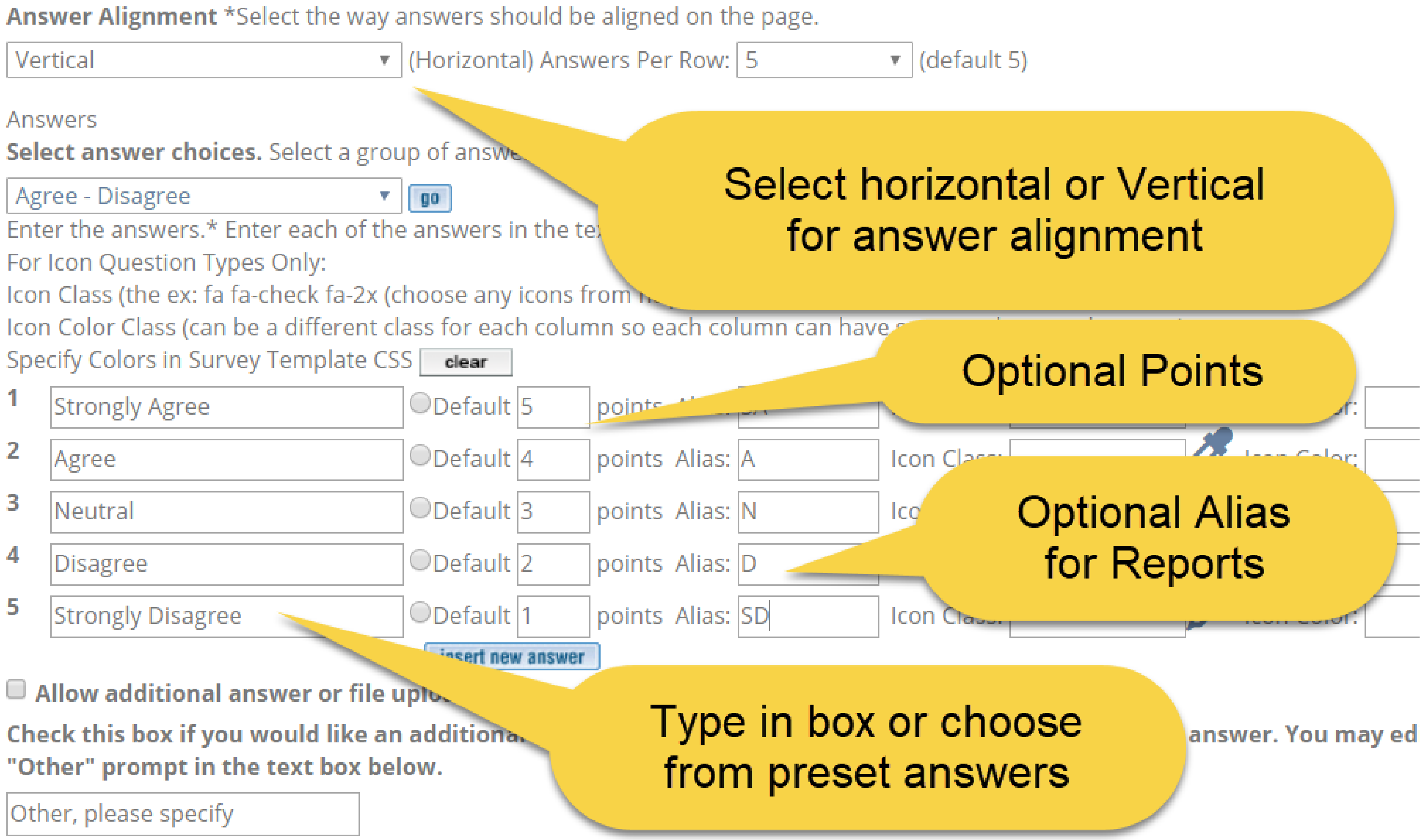
Next, there is a drop down for answer option groups. This is optional, when you select from the drop down it will populate the answers with the text for the group selected.

The “Default” radio button is to set a specific answer to be pre-selected as the default answer.

The “Points” box is for entering points that you would like calculated on the reports related to the answers chosen.

The “Alias” box is for an abbreviation of the answer text that will show on the reports such as the export.

Some question types also have option to include an “other, please specify” option – you can change the text in the box, or make it a file upload question or a comments box question. In addition, you can specify if you want this additional answer validated with or without the “required” validation.



Question Types

The basic question type categories are described below.

Open Ended Question Types:
Question types that allow the respondent to enter open ended text answers.

Choice Question Types:
Question types that allow respondents to select from predetermined answer options.

Matrix Question Types:
Question types that contain one or more columns and rows.

Presentation Question Types:
Question types that display or highlight information to the respondent.

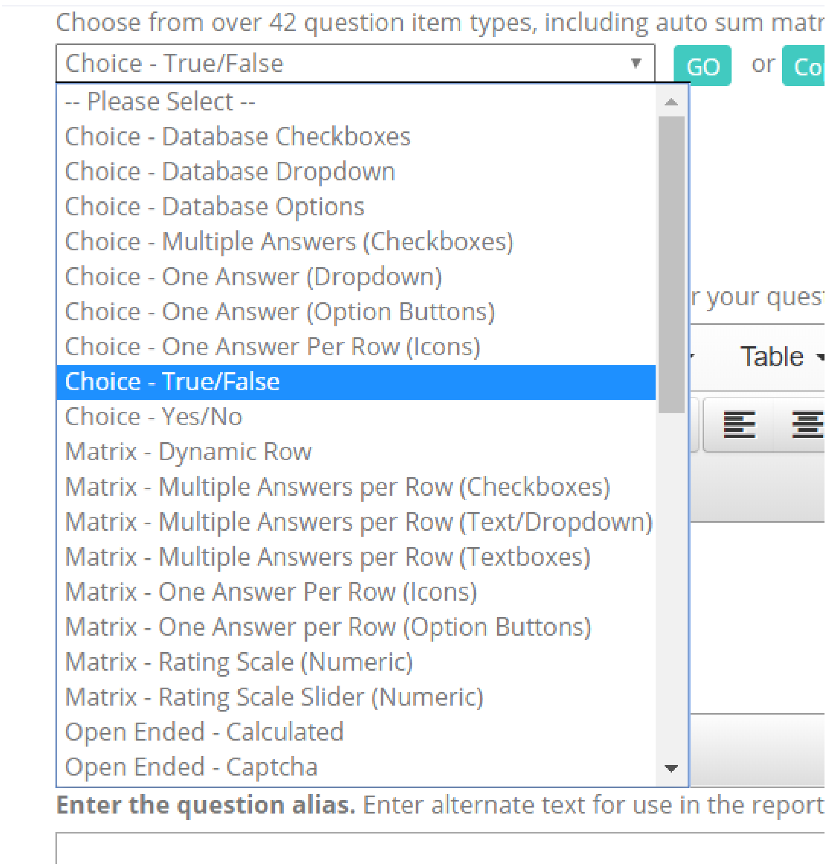
Database Query Question Types:
Question types that allow you to type in a database query to select the items that show up in the list of answer options.

Touch Question Types:
Question types that are specific to kiosk, ipad or touch screens. Note that all question types work on these devices, these are just specific to this presentation type.

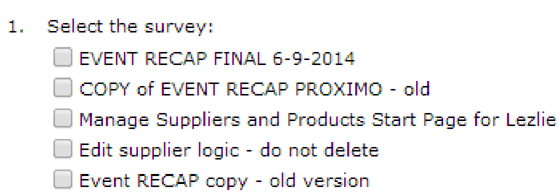
Random Question Types:
Question types that display a random image or a random message out of a group of images or group of messages that you have created. The random image or message that was shown is listed in the reports with the answers to that question.

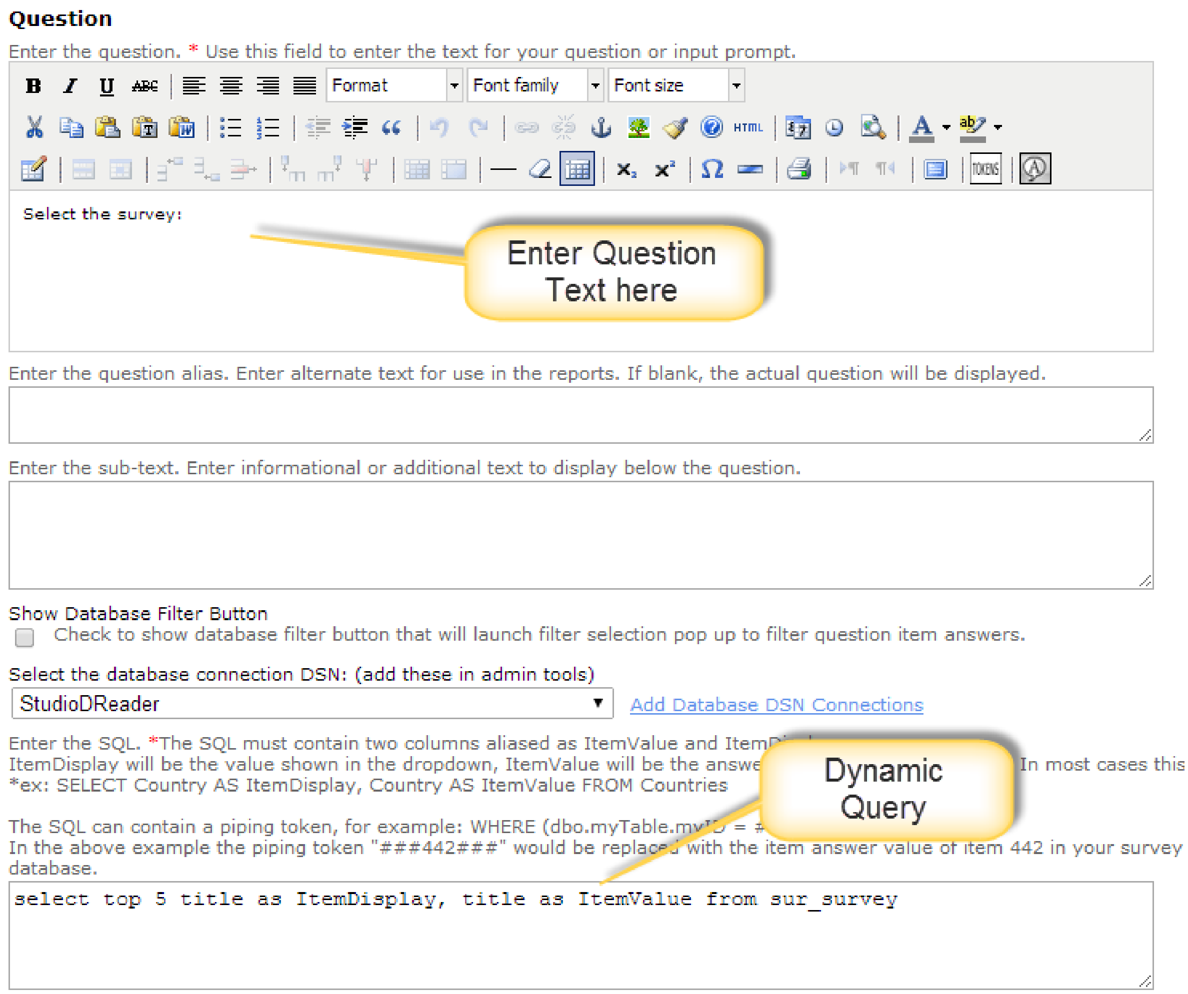
Choose Question Type

The steps that follow will vary based on the type of question you chose. There are 42 different question types, and each has multiple options. To pick a question click “Insert” on the modify survey page and you will see a drop down box similar to the below to pick a question type from:



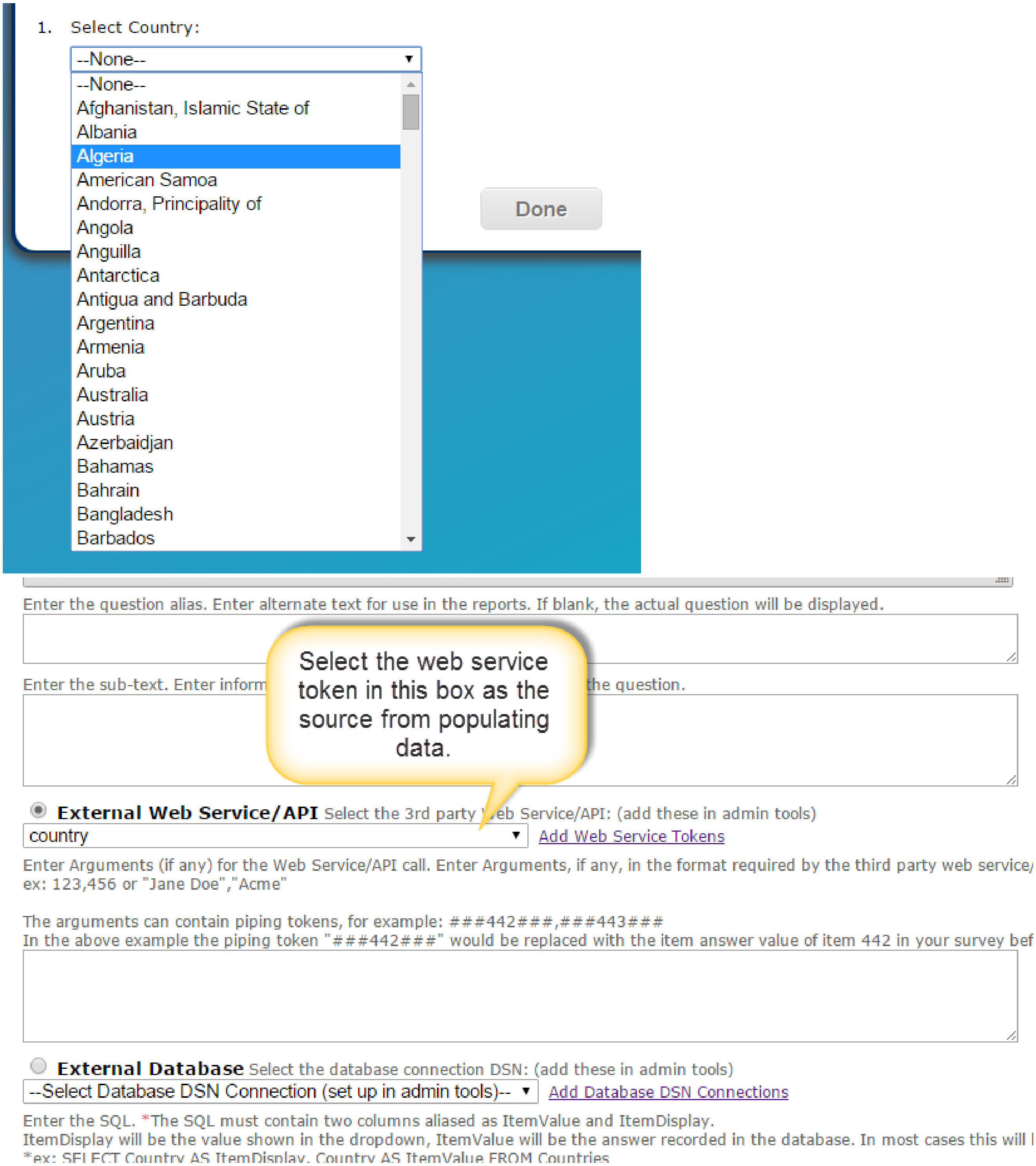
- **Choice - Database Checkboxes**
  Entering your dynamic database query returns rows for checkbox list.





- *Note: This is only for SQL database lookups, this is covered in the Power User Class.*

- **Choice - Database Dropdown (Populate from DB or Web service)**
  Entering your dynamic database query or web service returns rows for dropdown box.



- *Note: This is only for SQL database lookups, this is covered in the Power User Class.*

- **Choice – Database Options**

Entering your dynamic database query returns rows for radio buttons.

- *Note: This is only for SQL database lookups or populating from web service, this is covered in the Power User Class.*

- **Choice - Multiple Answers (Checkboxes)**
  Respondent can select multiple boxes, and optionally you can display an open ended textbox or comments box, or file upload for the "other" option. Points can be assigned to answer options.

1. Example of Choice - Multiple Answers (Checkboxes) Question Type.
   Please select each College Class that you took in 2013:
   ☐ English 1
   ☐ English 2
   ☐ English 3
   ☐ Composition
   ☐ Journalism
   ☐ Other, please specify

- **Choice - One Answer (Dropdown)**
  Respondent can only select one answer. Points can be assigned to answer options.

2. Example of Choice - One Answer (Dropdown) Question Type
   Please select how hard the last semester was for you:
   --None--

- **Choice - One Answer (Option Buttons)** ("Likert Scale")
  Respondent can only select one answer. Points can be assigned to answer options.

3. Example of "Choice - One Answer (Option Buttons) Question Type. This is typically used as a "LIKERT SCALE".
   ○ Strongly Agree ○ Agree ○ Neutral ○ Disagree ○ Strongly Disagree

4. Example of "Choice - One Answer (Option Buttons) Question Type. This is typically used as a "LIKERT SCALE".
   ○ Strongly Agree
   ○ Agree
   ○ Neutral
   ○ Disagree
   ○ Strongly Disagree

- **Choice –Icons**
  Respondent can only select one answer. Points can be assigned to answer options.

3. Pick your favorite car

Posrche
Corvette
Mercedes

- **Choice - True/False**
  Respondent can only select one answer. If you need points assigned, use the choice dropdown and enter “true” and “false” as the options instead of this question type.

5. Example of "Choice - True/False" Question Type.
   The sky is blue.
   Select whether you think this statement is true or false.
   --None--

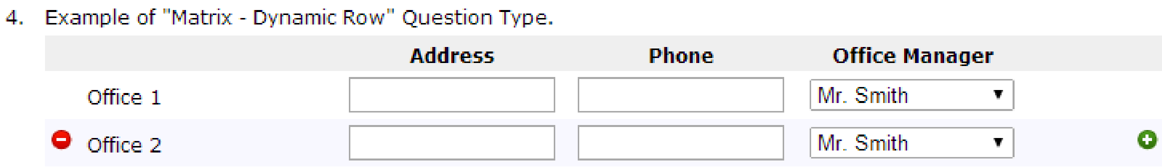
6. Example of "Choice - True/False" Question Type.
   The sky is blue.
   Select whether you think this statement is true or false.
   ○ True
   ○ False

- **Choice - Yes/No**
  Respondent can only select one answer. If you need points assigned, use the choice dropdown and enter “yes” and “no” as the options instead of this question type.

7. Example of "Choice - Yes/No" Question Type.
   Is the sky blue?
   --None--

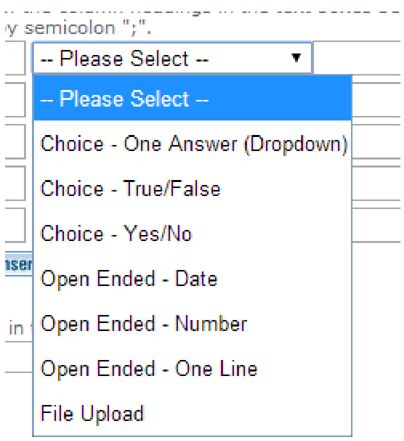
8. Example of "Choice - Yes/No" Question Type.
   Is the sky blue?
   ○ Yes ○ No

- **Matrix - Dynamic Row**
  By default only the first row shows. Respondent clicks the green plus icon to add additional rows, or the red minus icon to remove rows.

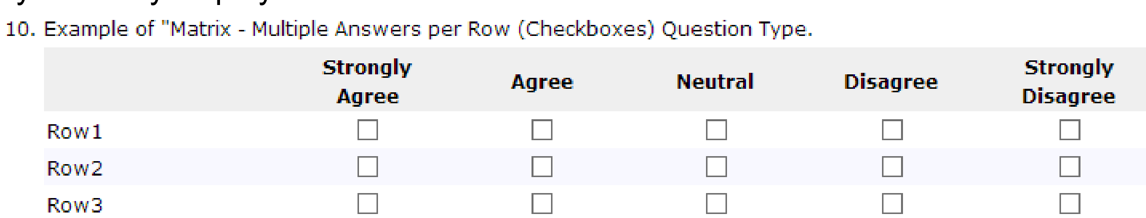

4. Example of "Matrix - Dynamic Row" Question Type.

	Address	Phone	Office Manager
Office 1			Mr. Smith
Office 2			Mr. Smith

Column types are: Choice – One Answer (Dropdown), Choice – True/False, Choice – Yes/No, Open Ended – Date, Open Ended – Number, Open Ended – One Line, File Upload.

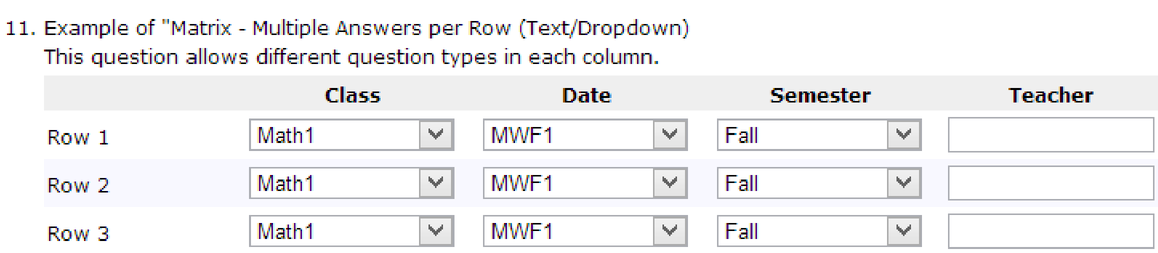


- **Matrix - Multiple Answers per Row (Checkboxes)**
  Respondent can select multiple boxes in each row and column. Row text can by dynamically displayed.


10. Example of "Matrix - Multiple Answers per Row (Checkboxes) Question Type.

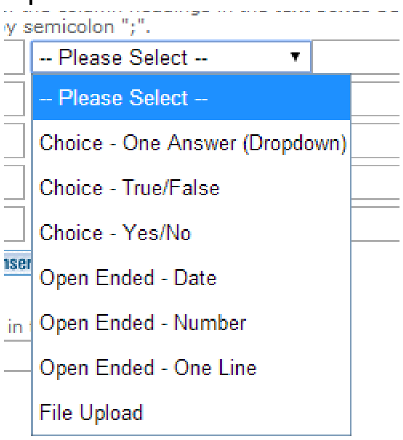
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Row1	☐	☐	☐	☐	☐
Row2	☐	☐	☐	☐	☐
Row3	☐	☐	☐	☐	☐

- **Matrix - Multiple Answers per Row (Text/Dropdown)**
  Multiple question types in each column. Row text can by dynamically displayed.

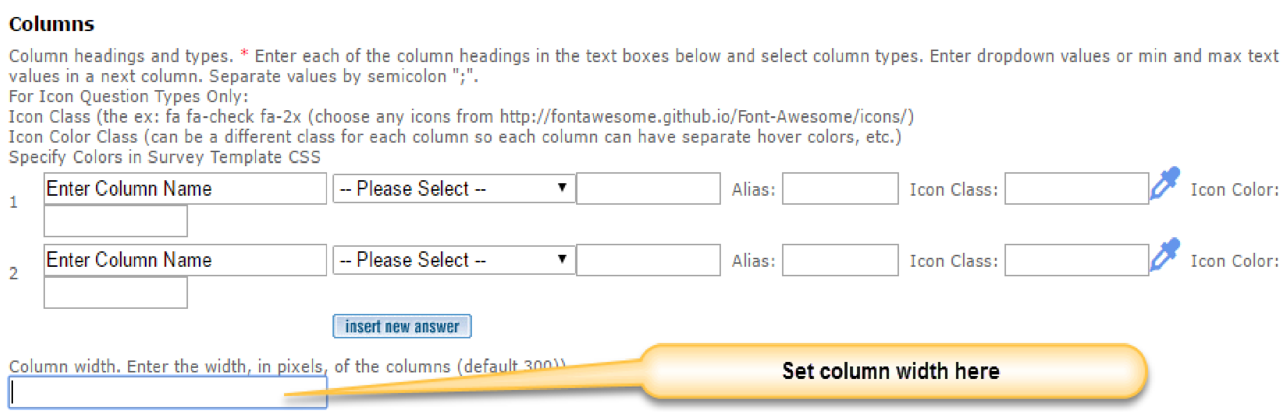

11. Example of "Matrix - Multiple Answers per Row (Text/Dropdown)
This question allows different question types in each column.

	Class	Date	Semester	Teacher
Row 1	Math1	MWF1	Fall	
Row 2	Math1	MWF1	Fall	
Row 3	Math1	MWF1	Fall	

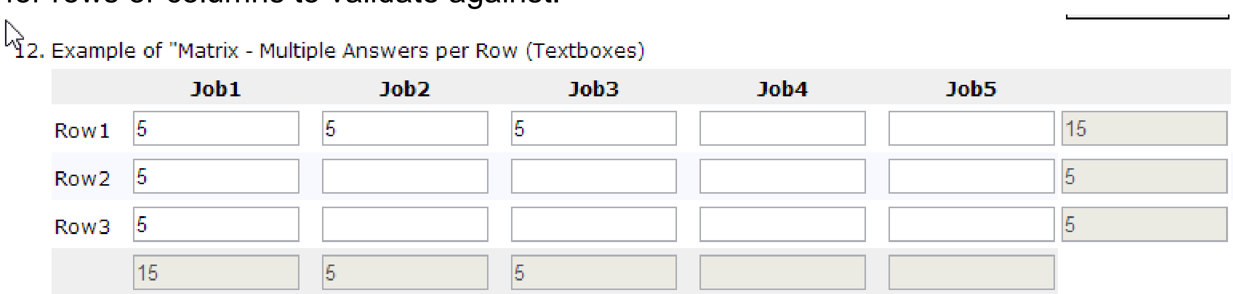
Column types are: Choice – One Answer (Dropdown), Choice – True/False, Choice – Yes/No, Open Ended – Date, Open Ended –Number, Open Ended – One Line, File Upload.



You can set the matrix column width for these column types as shown below.



- **Matrix - Multiple Answers per Row (Textboxes)**
  Optional to show row auto totals or column auto totals. Optionally can specify a total value for rows or columns to validate against.



- **Matrix - One Answer per Row (Icons)**
  Respondent can only select one radio button per row. Rows can by dynamically generated.

- **Matrix - One Answer per Row (Option Buttons)**
  Respondent can only select one radio button per row. Rows can by dynamically generated.

13. Example of "Matrix - One Answer per Row (Option Buttons)

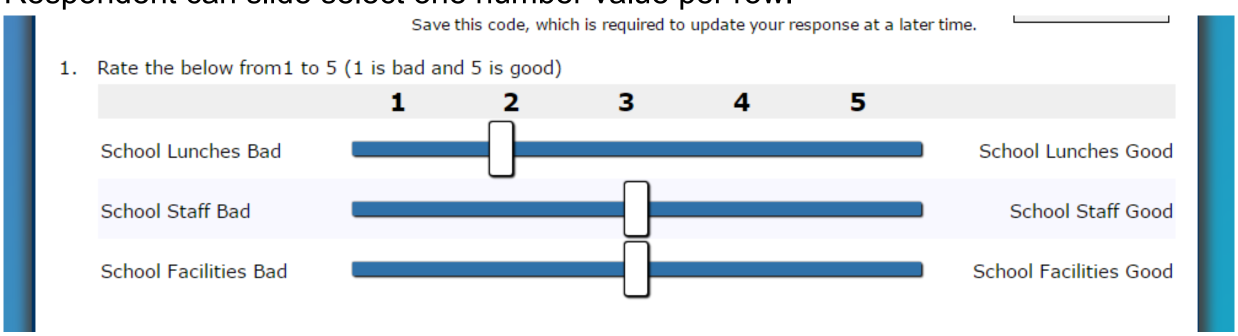
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Row1	○	○	○	○	○
Row2	○	○	○	○	○
Row3	○	○	○	○	○

- **Matrix - Rating Scale (Numeric)**
  Respondent can select only one radio button per row.

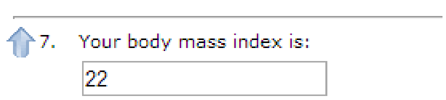
1[illegible]. Example of "Matrix - Rating scale"

	1	2	3	4	5
Row1	○	○	○	○	○
Row2	○	○	○	○	○
Row3	○	○	○	○	○

- **Matrix Rating Scale Slider (Numeric)**
  Respondent can slide select one number value per row.



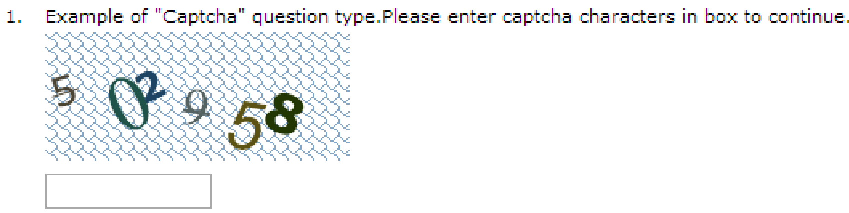
- **Open Ended – Calculated**
  This question display a dynamically calculated number calculated from piping tokens or formula that you type in, and displays it to the respondent.



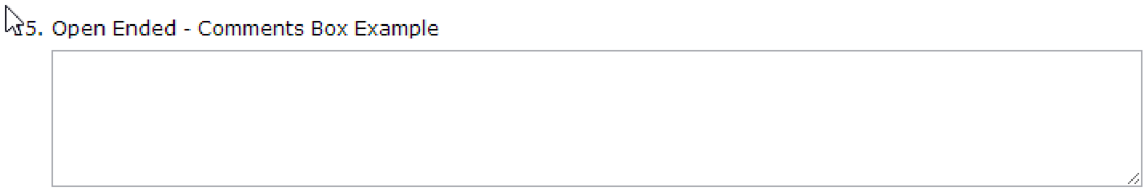
  - *Note: This is covered in the Power User Class.*

- **Open Ended – Captcha**

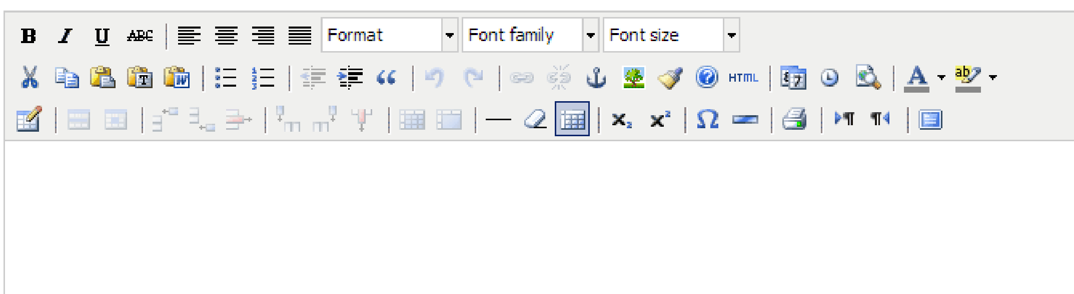
The captcha question type prevents “robots” or “bots” from taking your public facing surveys. By placing a captcha question on the first page, you can eliminate spam responses.



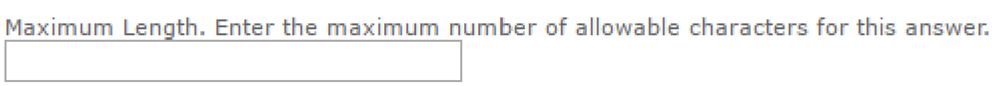
- **Open Ended - Comments Box**
  Respondent can enter or paste in unlimited text (specified by text data type in database only limited by disk space). Optionally you can choose to display a rich text box for the respondent instead of a plain text box.
  Respondent can fill this question type with bar code reader/scanner.
  Plain text view:



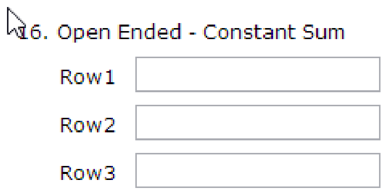
  Rich text view:



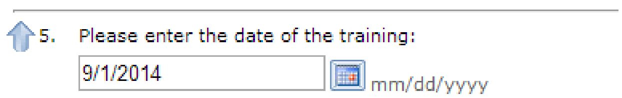
  You can add a max length to your comment box to limit the length of a response to a certain number of characters.



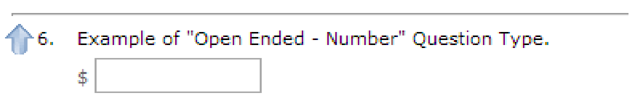
- **Open Ended - Constant Sum**
  A total is specified for the numbers on each row to add up to. If you need multiple columns, use the matrix – text boxes with auto sum feature question instead.



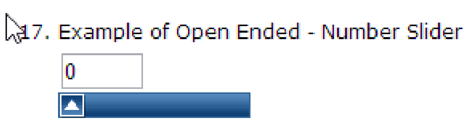
- **Open Ended – Date**
  Optionally displays current date. Respondent can use the date picker, or iphone/phone date selector (html5 is used depending on the browser/phone being used by respondent). If you need alternate entry formats, use the open ended one line question type instead.



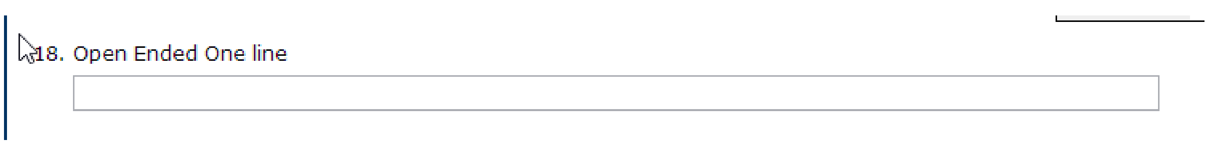
- **Open Ended – Number**
  For number entry of integers, decimals, currency, Euros. Select the number masking format from the options, or leave blank for the default for any number format. Respondent can fill this question type with bar code reader/scanner.



- **Open Ended - Number Slider**
  Specify minimum and maximum number for the slider range and default value.

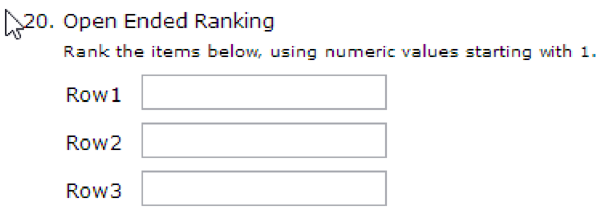


- **Open Ended - One Line**
  Specify default value (can use piping token from prior question to prepopulate). You can also specify the field width and the maximum characters allowed for respondent to enter. Respondent can fill this question type with bar code reader/scanner.

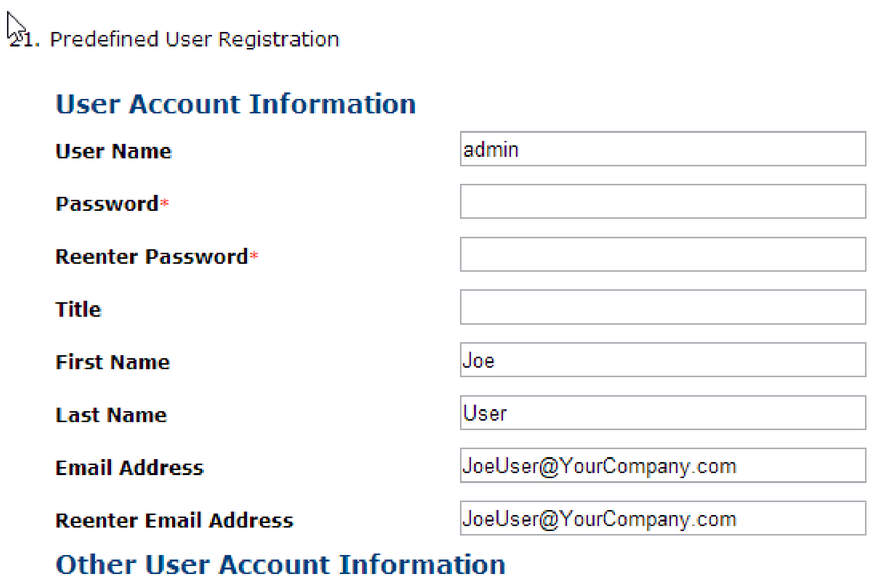


- **Open Ended - One or More Lines**
  Respondent can enter 255 characters per line. For longer text, use the comments box question type.

- **Open Ended – Ranking**
  Specify the starting and ending ranking numbers that the respondent must rank with.

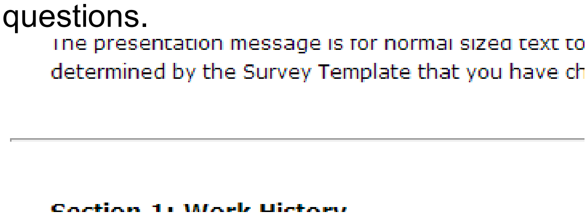


- **Predefined - User Registration**
  This question type actually creates a user in the survey system with a "user" role, which can only take surveys. Users can see surveys they are editing, or were invited to in the user workspace. Users can edit their contact information but cannot see any other admin pages besides taking surveys. If the user is already logged in, the question prepopulates with their information.

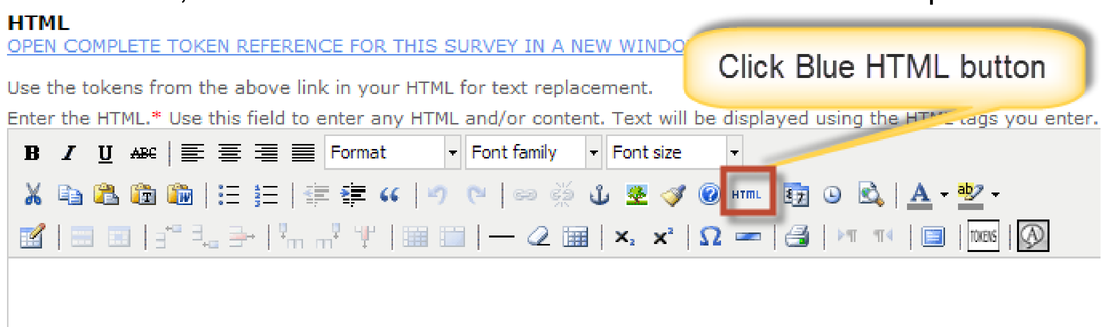


- **Presentation – Heading**
  The heading is used to separate or organize the look and feel of the survey. The style of the text is determined by the survey template that is specified on the survey options page.

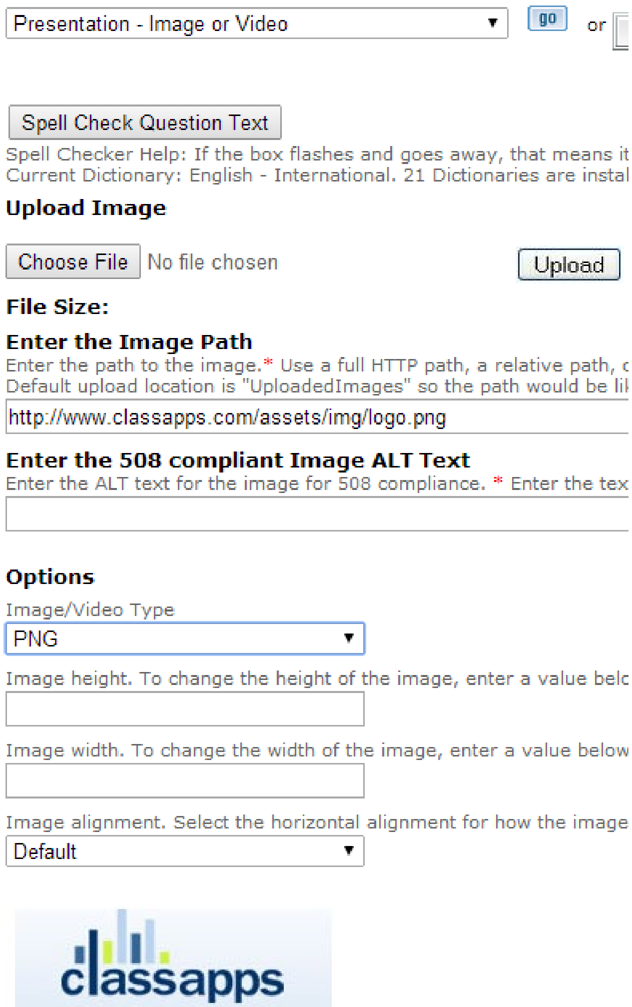
- **Presentation - Horizontal Rule (HR)**
  The horizontal rule is a thin line that goes across the page of the survey separating the questions.



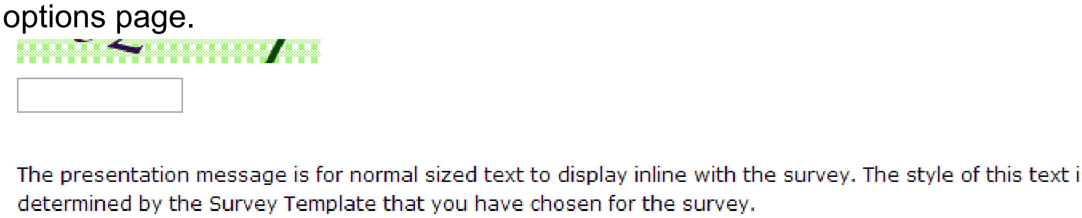
- **Presentation – HTML**
  This question type allows you to paste in any html to display to the respondent. For example, you can paste in PayPal donate button, purchasing buttons/links, maps for directions, youtube videos, dynamic content from other web sites, links to document downloads, videos, or music.
  To add HTML, click the blue “HTML” button in the rich text box to open the html editor.



- **Presentation - Image or Video**
  Specify the web ready URL of your image or video, or upload using the upload button. Specify the height and width of the image or video or leave blank to use the image/videos actual height and width. The 508 text will show with mouse over and is also used for the JAWS screen reader.



- **Presentation – Message**
  The presentation message is used to separate or organize the look and feel of the survey. The style of the text is determined by the survey template that is specified on the survey options page.



- **Presentation - Sound (Full)**
  This has all of the sound controls to replay the sound file.

- **Presentation - Sound (One Time)**
  This only plays the sound one time and hides all of the other controls.

- **Random Image**
  Random image is displayed to respondent from a group of images that are defined by the survey administrator.

  • When building a survey, “Random Image” is now a question type
  • When selected, this question type functions similarly to the standard question type of “Presentation Image”,
  but rather than uploading a single file it allows the programmer to select from the “Random Image Groups”
  that have been created
  • When a survey respondent is taken their survey and arrives at this question, the tool will randomly select 1
  image from the specified “Random Image Group” to display
  • That randomly selected image can then be held constant throughout that respondents survey using the
  “Pipe” functionality in subsequent questions; if the programmer intends to do so
  • When exporting survey results, the data file will display the file name of the image that respondent was
  shown

  You can upload a group of images that will be randomly shown on the survey.
  To manage the "groups" of random images, you can click the manage groups link after inserting the question type, or, go to admin tools > manage random groups

- **Random Message – Single Choice Options**
  Random message is displayed to respondent from a group of messages that are defined by the survey administrator.

  When building a survey, “Random Message; One Answer (Option Buttons)” is now a question type
  • When selected, this question type functions similarly to the previous custom question, but now utilizing the
  “Random Message Group” defined earlier

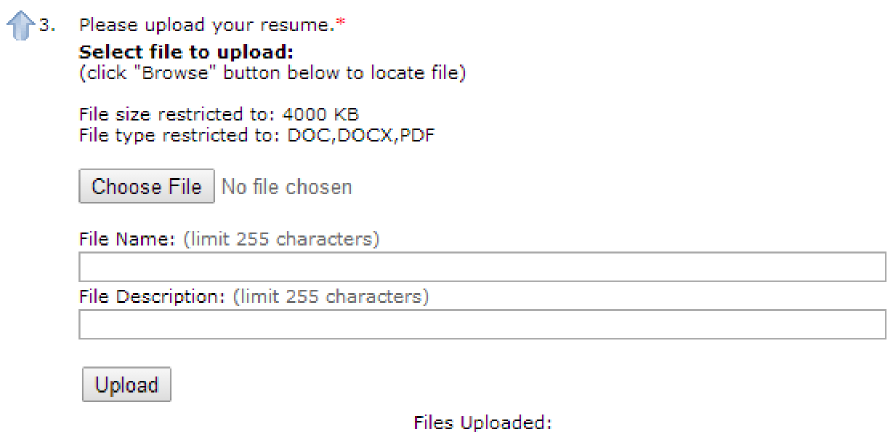
• When a survey respondent is taken their survey and arrives at this question, the tool will randomly select a predetermined
number of text-based messages from the Excel file associated with the “Random Message Group”
• These messages will appear as answer choices to a question, with an option button below each
• Respondents may only select a single answer choice
• Their single selection may then be pulled into a subsequent question using the “Pipe” functionality in subsequent
questions; if the programmer intends to do so
•When exporting survey results, the data file will display the actual text of the message that respondent selected;
including when piped forward to subsequent questions

You can upload a group of text messages that will randomly be shown on the survey.
To manage the "groups" of random images, you can click the manage groups link after inserting the question type, or, go to admin tools > manage random groups
With messages you import from excel file.

Each time this question type is used within a survey on a different page, different random messages (answer choices) will
be shown
• Randomly selected messages (answer choices) will only remain constant across multiple questions on the same page
• A respondents single selection of a messages (answer choice) may then be pulled into a subsequent question using the
“Pipe” functionality in subsequent questions; if the programmer intends to do so
• During a respondents single survey instance, the same message file will never be randomly selected more than once
(meaning that a respondent will never see the same random message twice unless specified by the survey programmer
using the “Pipe” functionality or by having multiple questions of this type on the same page)
• Across the course of a study, the survey tool will to the best of its ability ensure even distribution of all statements within
a Random Message Group Excel file across the total sample of respondents
•When exporting survey results, the data file will display the actual text of the message that respondent selected; including
when piped forward to subsequent questions

- **Respondent File Upload**

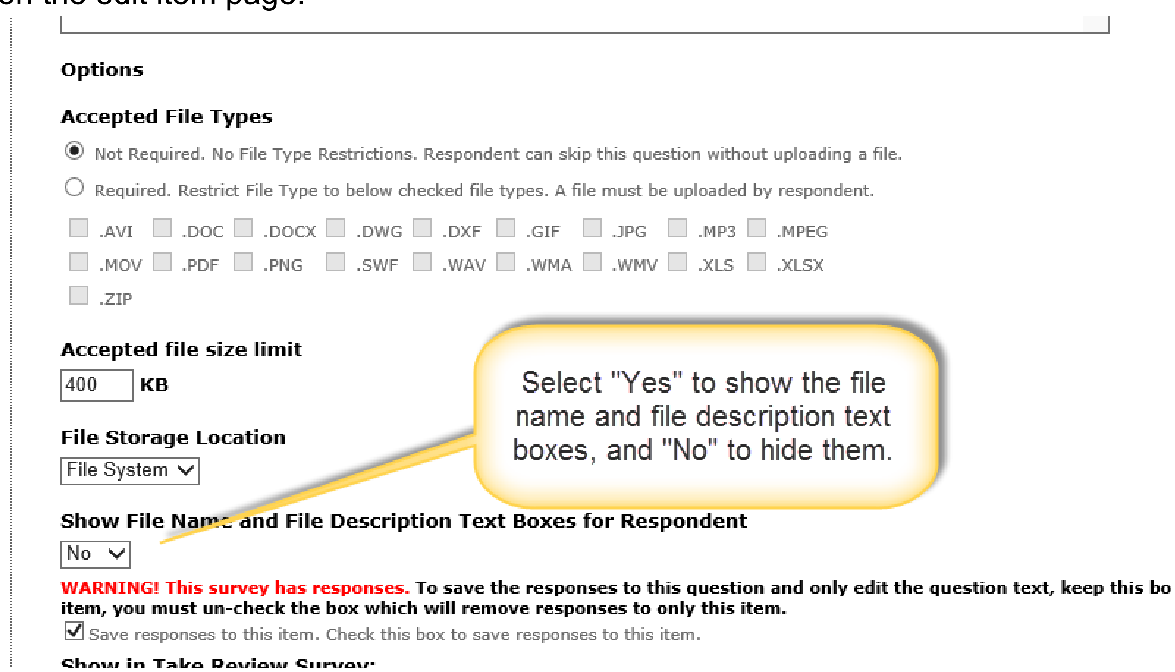
Respondent can upload one file at a time. For multiple files, use the matrix text/dropdown or dynamic row matrix with the file upload column type.



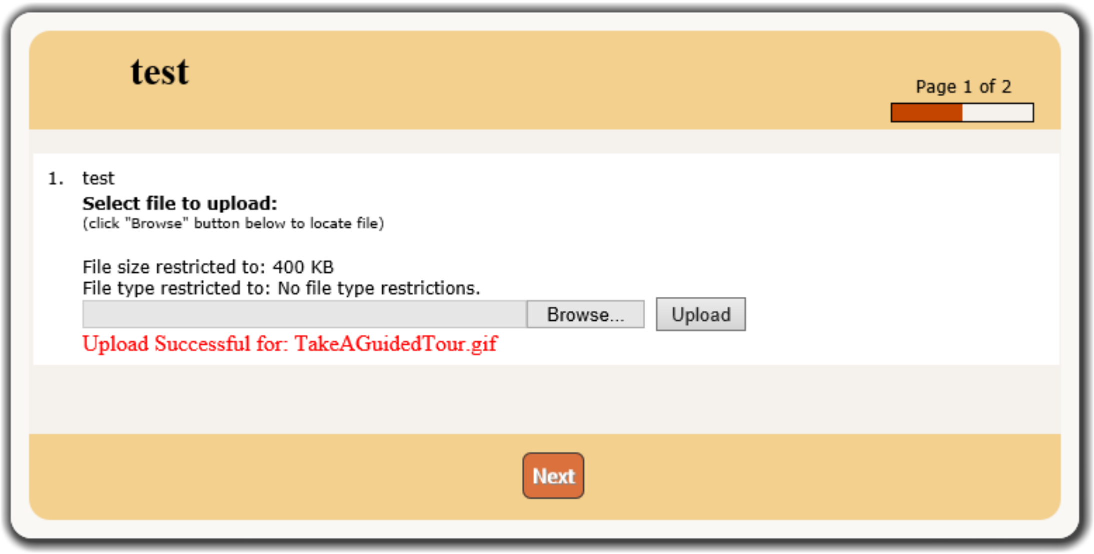
There are two display modes:

- Show “File Name” and “File Description” text boxes
- Hide “File Name” and “File Description” text boxes.

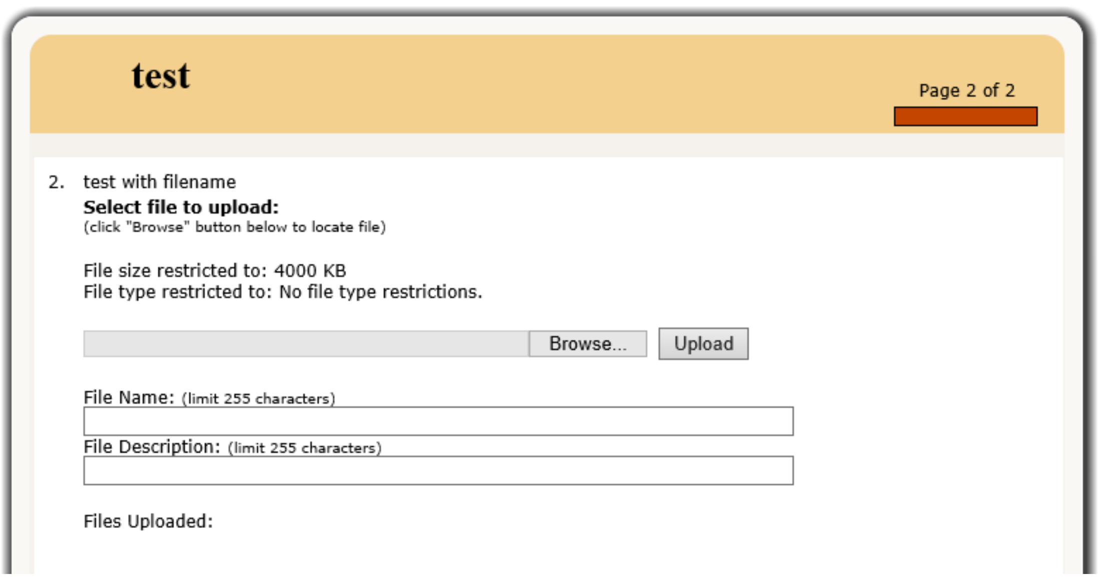
To change the setting choose “Yes” or “No” from the drop down box shown below on the edit item page:



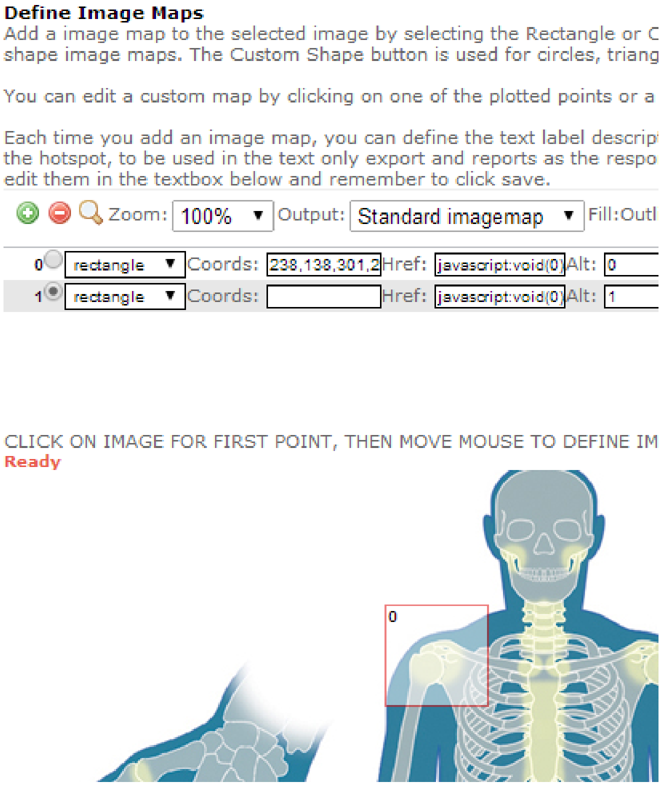
The question with the textboxes hidden looks like so:



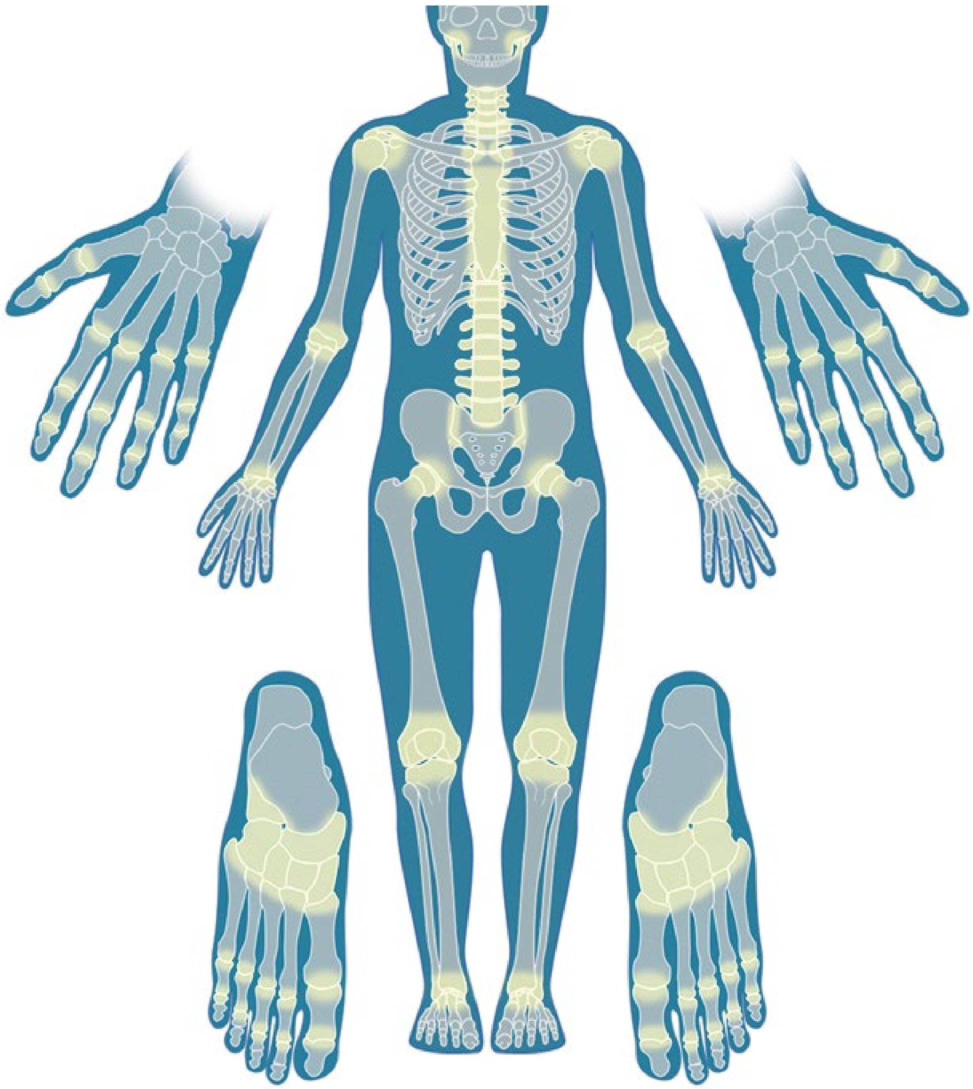
The question with the textboxes shown looks like so:



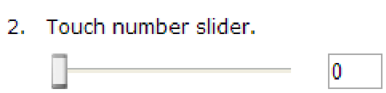
- **TOUCH - Clickable Image Maps**
  Specify an image and define your own click regions for use with kiosks and touch screens. The value from the click region is stored as the survey answer and displays in the box below the image.



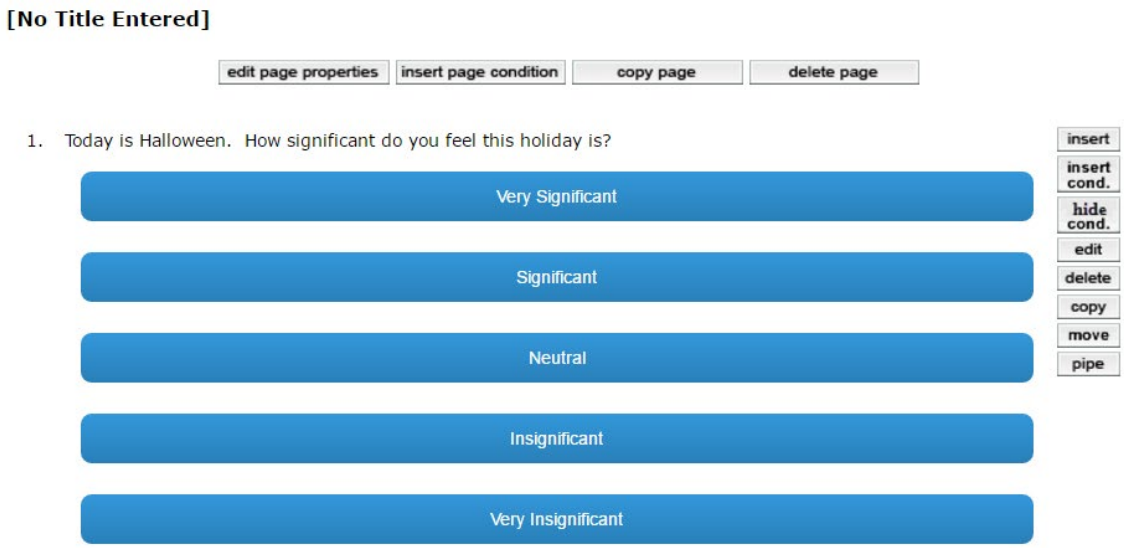
On the survey the boxes, circles or polygons are hidden, but if a respondent clicks there, the text associated with the area automaticaly populates the text box below.



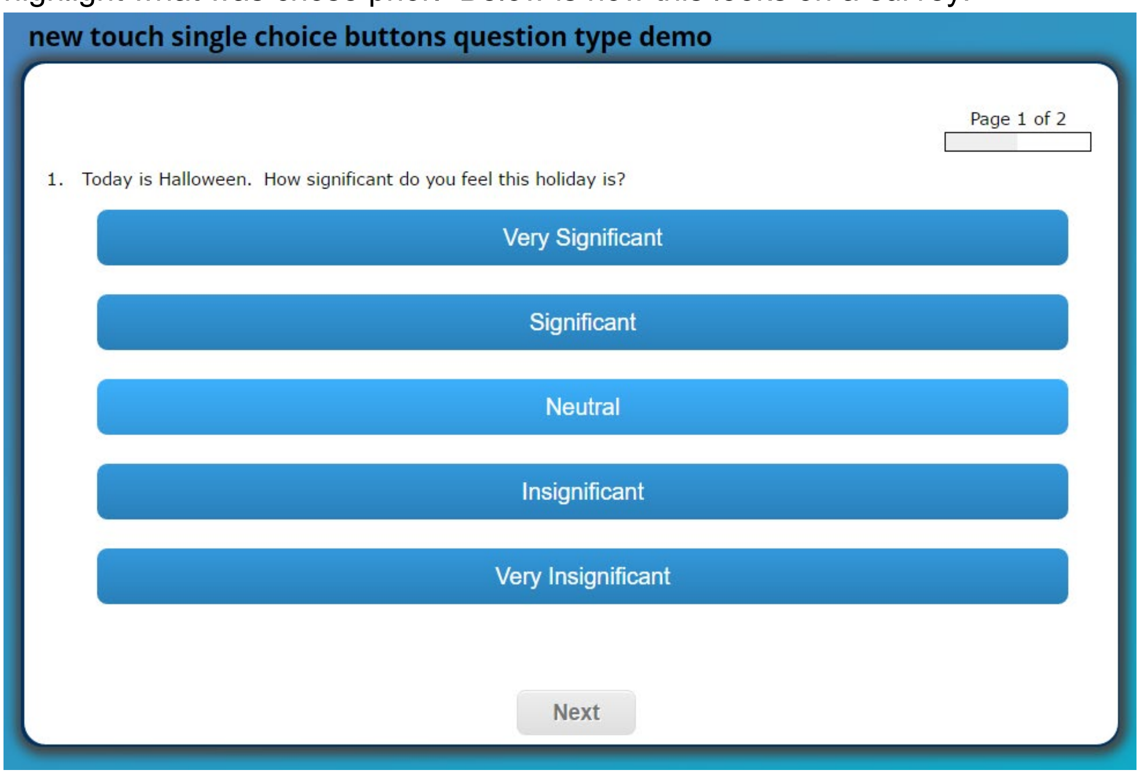
- **TOUCH - Number Slider**
  The number slider shows in html 5 if an iphone, kiosk, ipad or touchscreen is being used.



- **TOUCH – Single Choice Buttons**
  Specify answer text, and answer option text. The answer option text will appear on the buttons. This question type works in phones, kiosks, ipads, and works with touch enabled devices (finger touch, pen, cursor, or mouse)

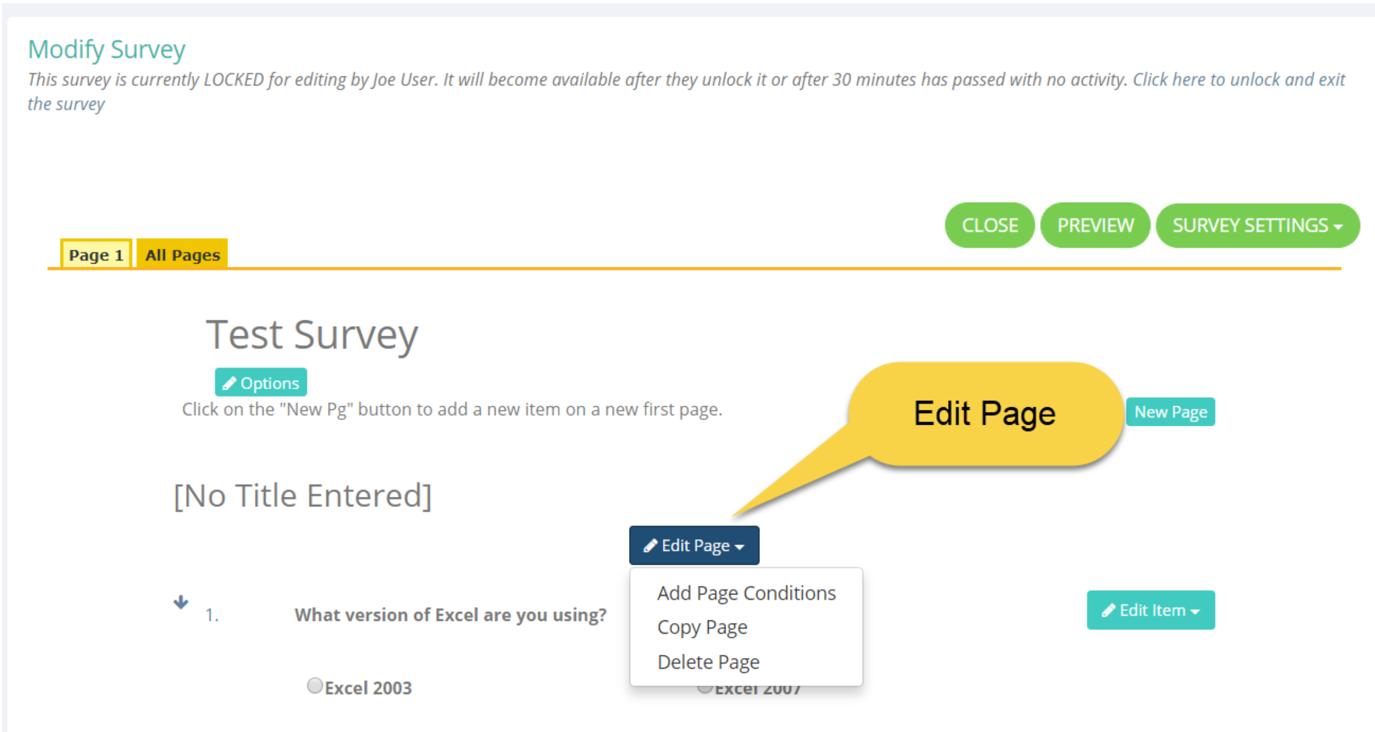


When an item is selected, the button highlights. Even when clicking the back button it will highlight what was chose prior. Below is how this looks on a survey:



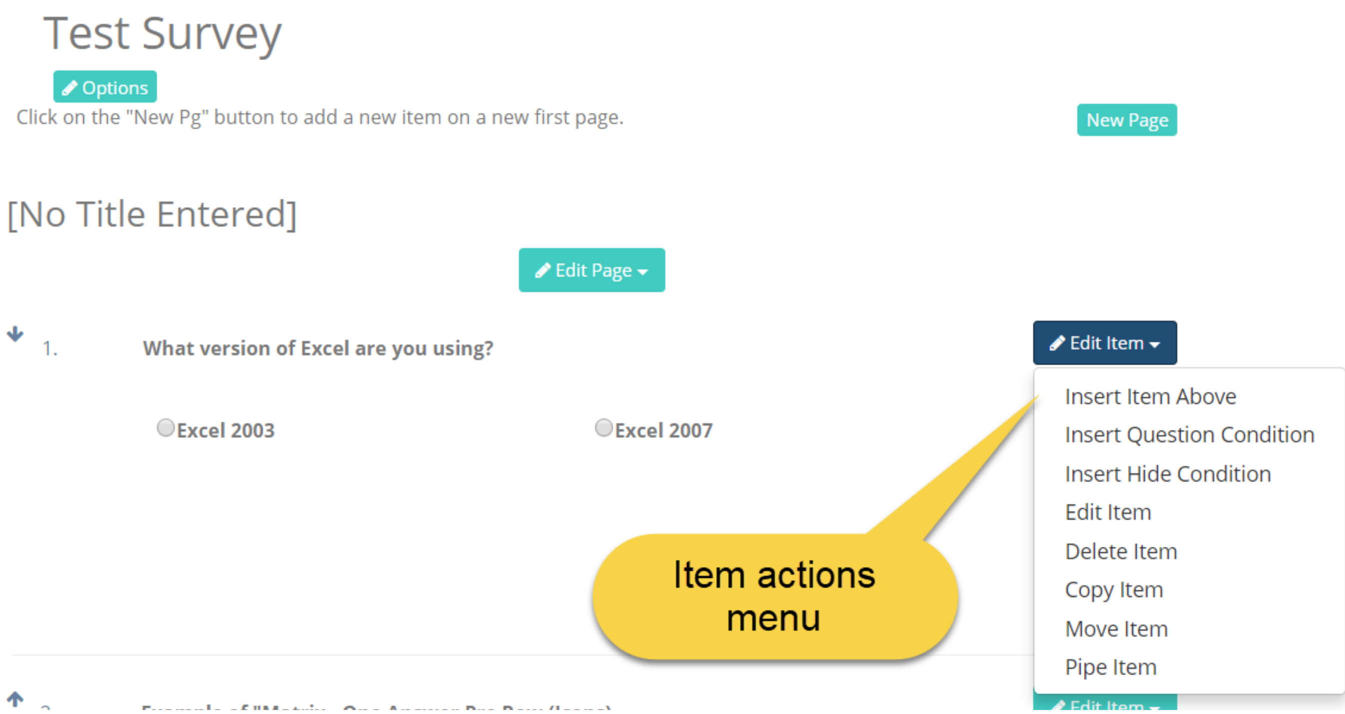
Modify Survey

The **Modify Survey** page is displayed with the survey title and the first question.



Insert a New Question on a New Page

Your survey can contain an unlimited number of questions distributed amongst any number of pages. You can also copy existing items and then edit them. Below shows the different item actions.



- Click **Edit** to edit an existing question.
- Click **Delete** if you decide that you don't want this question anymore.
- Click **Copy** to copy the question, then you can edit it to save time.
- Click **Move** to change the order of the question.
- Click **Pipe** if you'd like to display the question answer in the text of questions on subsequent pages

Add Page Conditions

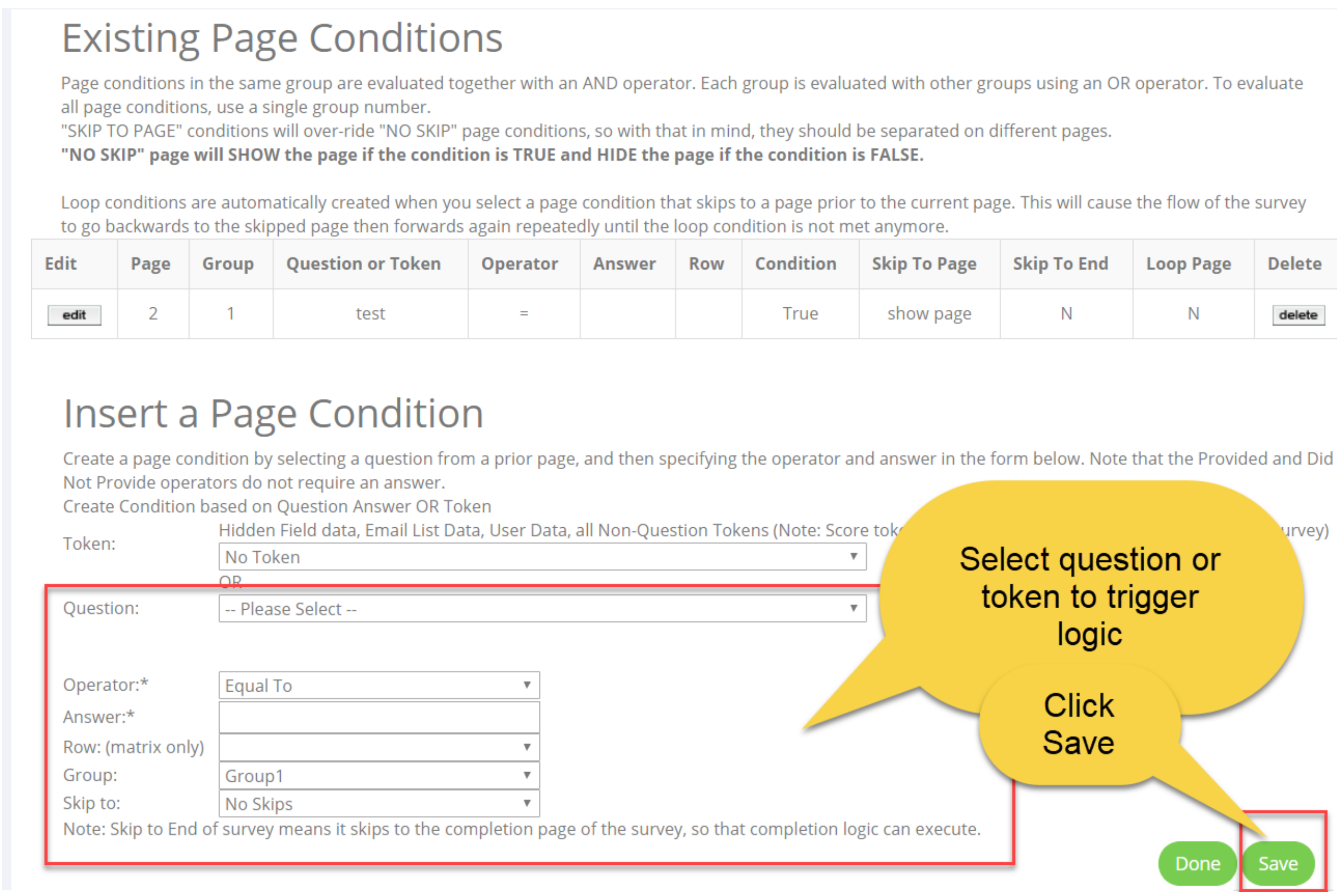
Before you begin...remember this:

- Plan ahead and insert all of your pages and questions first, deleting pages and questions will delete any page conditions associated with them.
- Insert page conditions on the page FOLLOWING the questions that will trigger them.

- Don’t overcomplicate – pages AUTOMATICALLY go from one page to the next and you don’t need to add page conditions to go forwards. Most of the time you only need one page condition to hide a page determined by a prior answer. Keep it simple.
- Multiple Page conditions – When you have multiple conditions they are evaluated with “AND” unless you change the “group” in which they are evaluated as “OR”.

Examples:
“AND” example: Hide page if Question 1 = yes OR question 2 = yes (this would have 2 different groups) By default all page conditions go under the same group number – which means each one has to evaluate to true in order for the page condition to trigger to hide the page.

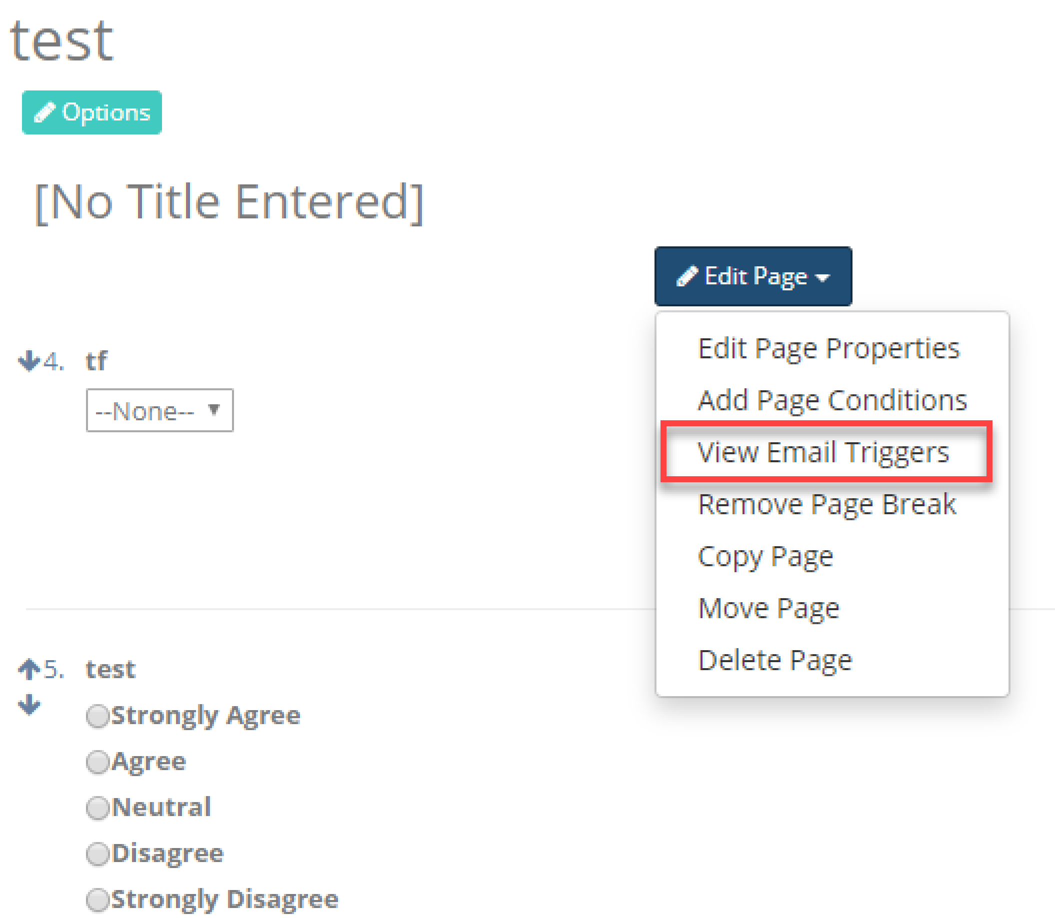
“OR” example: Hide page if Question 1 = yes OR question 2 = yes (this would have 2 different groups)



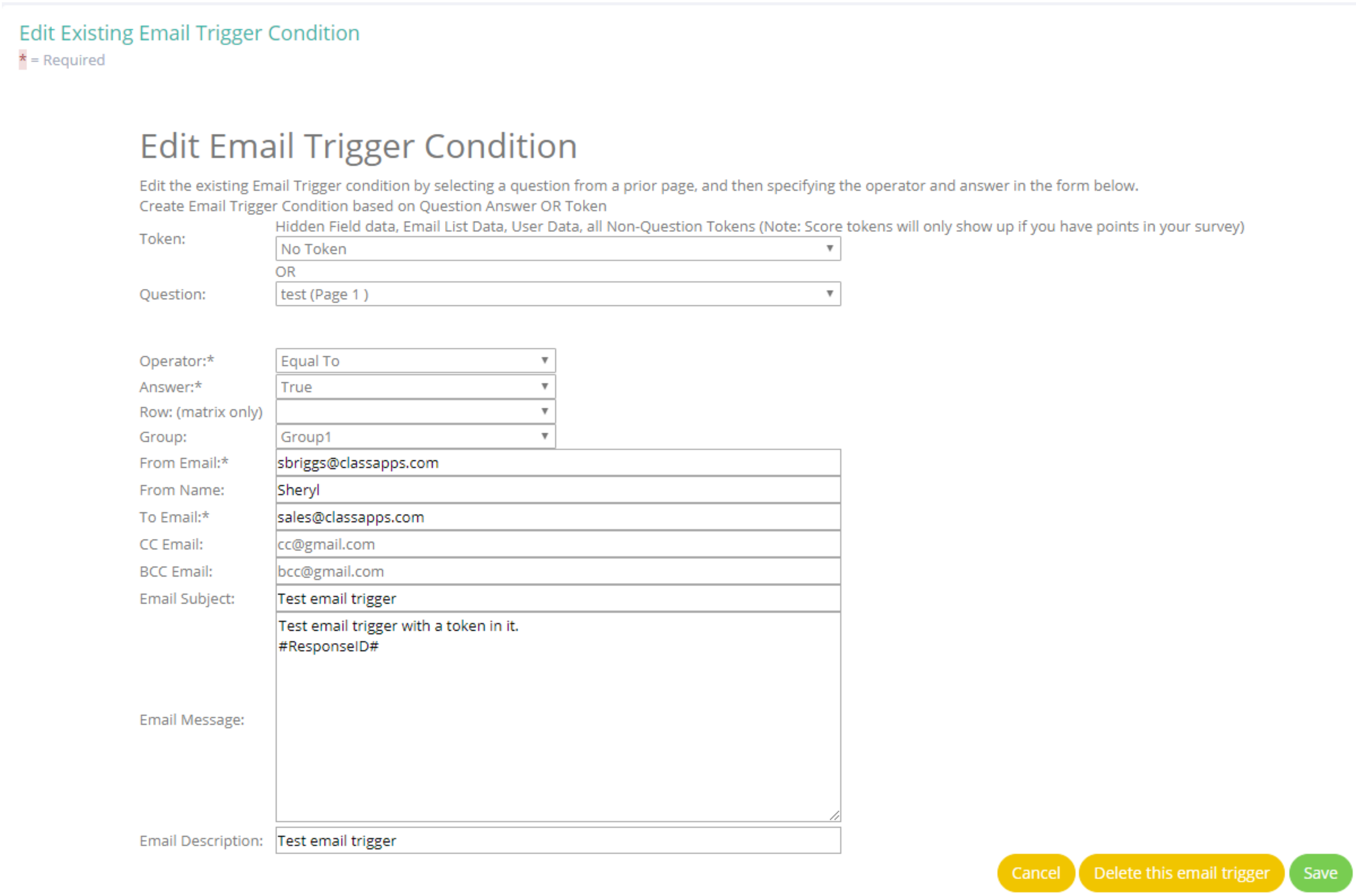
Email Trigger Page Conditions

Email trigger page conditions trigger the sending of an email when a certain question is answered a way that you specify. Email triggers are configured the same way page conditions are configured. Under the "Page" drop down, select "Add Email Trigger" or "View Email Triggers" to add or modify and email triggers for that page.

These emails are separate from the built in "Completion Email" that is configured on the "Survey Options" > "Completion" tab. These emails are also separate from the ActiveLogic workflow emails configured in ActiveLogic that are sent only on survey completion.



When you add an email trigger, you enter the email details as shown below:


Edit Existing Email Trigger Condition

* = Required

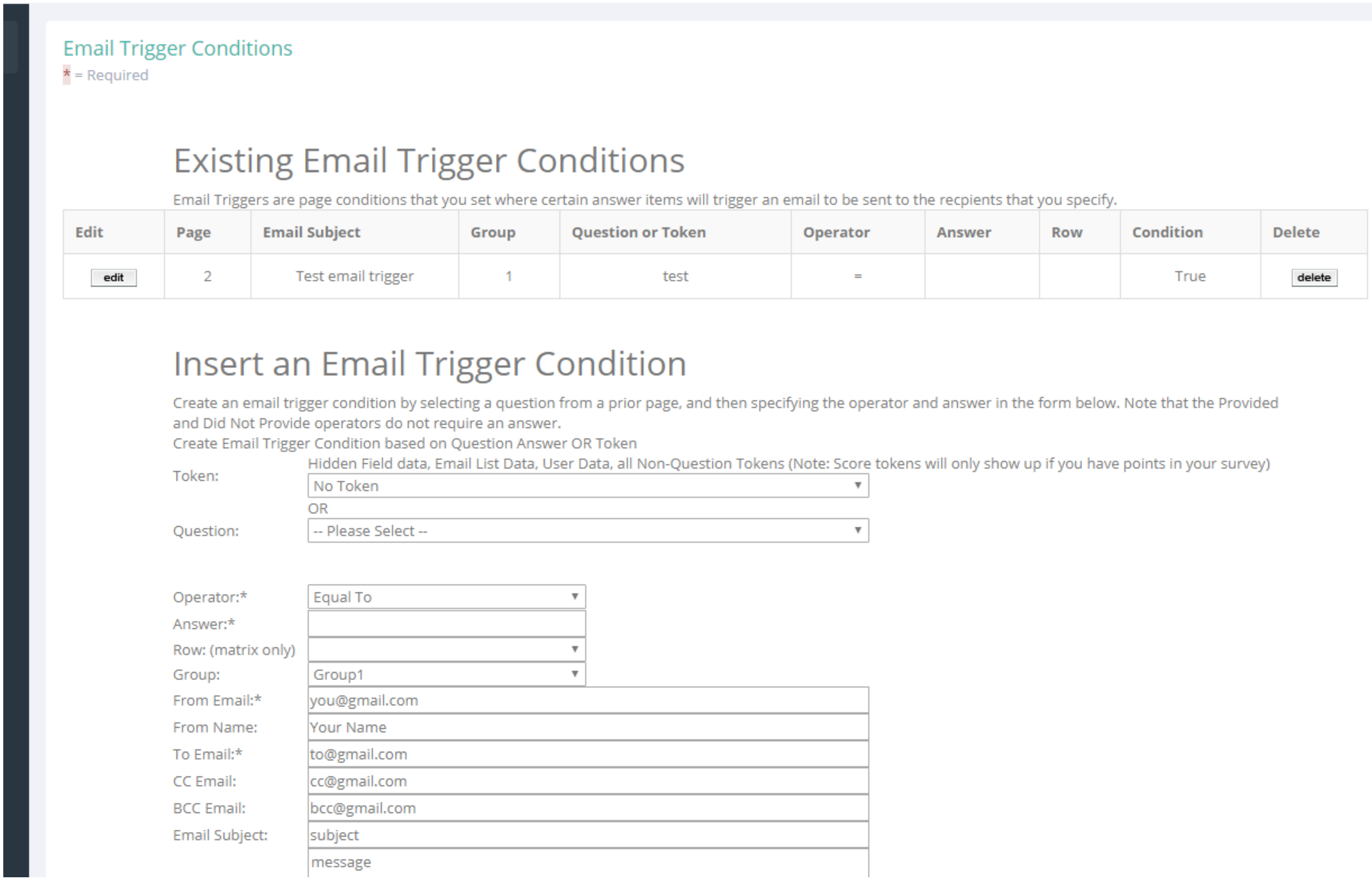
Edit Email Trigger Condition

Edit the existing Email Trigger condition by selecting a question from a prior page, and then specifying the operator and answer in the form below.
Create Email Trigger Condition based on Question Answer OR Token

Token:	Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token OR
Question:	test (Page 1)
Operator:*	Equal To
Answer:*	True
Row: (matrix only)	
Group:	Group1
From Email:*	sbriggs@classapps.com
From Name:	Sheryl
To Email:*	sales@classapps.com
CC Email:	cc@gmail.com
BCC Email:	bcc@gmail.com
Email Subject:	Test email trigger
Email Message:	Test email trigger with a token in it. #ResponseID#
Email Description:	Test email trigger

Cancel | Delete this email trigger | Save

After adding/editing an email trigger you can see a list of the trigger you added on the view email trigger page:

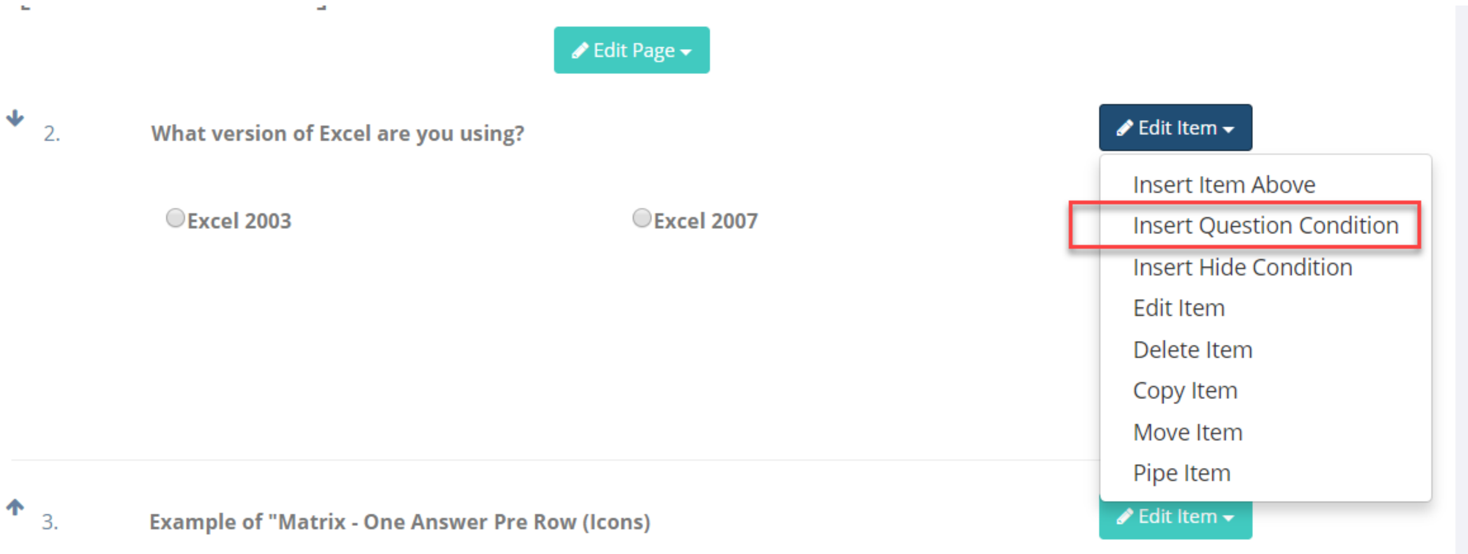


Question Conditions

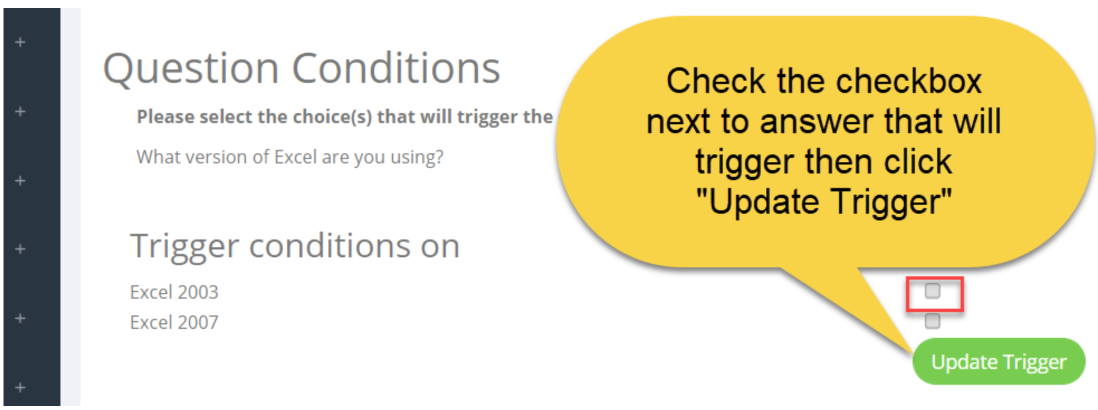
Question conditions hide or show one or more extra text box entries inside of a particular question.

The extra text boxes are triggered by a specific answer option being selected, that you choose.

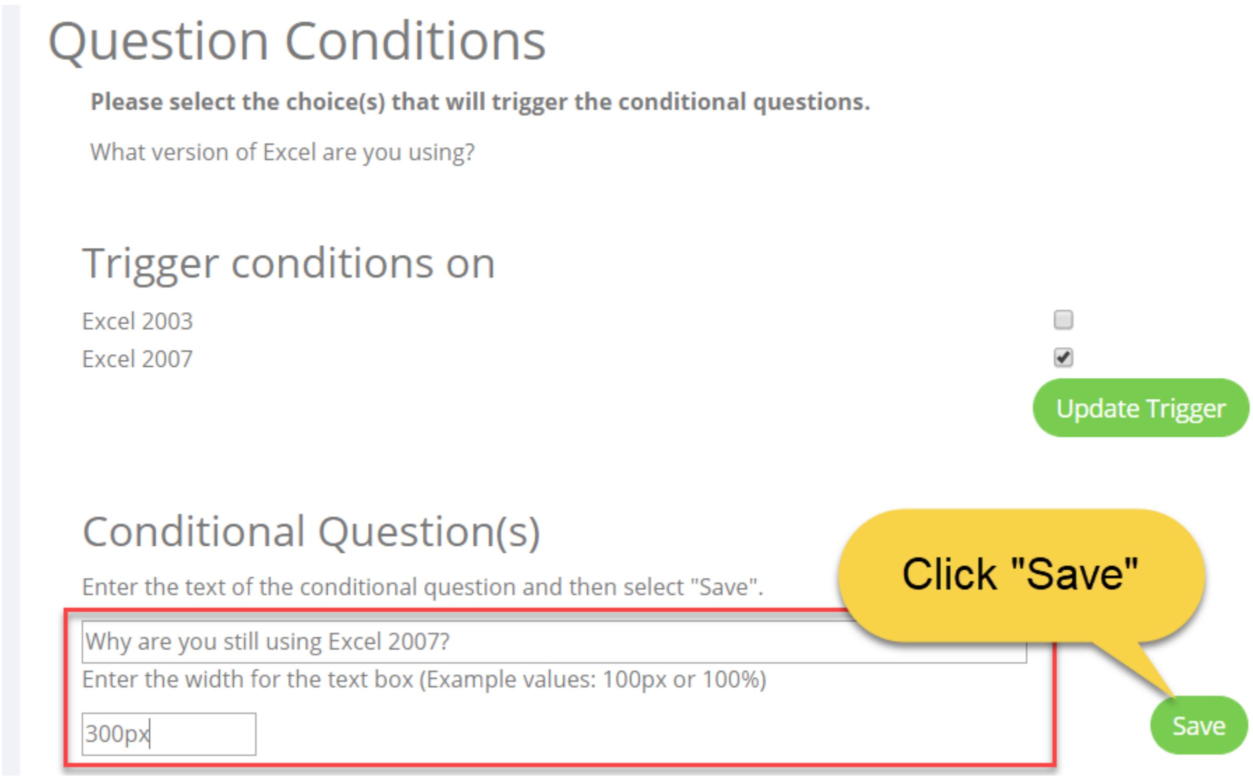
Click the “Insert Question Condition” button to the right of the question that you want to add conditional text boxes to.



Check the checkbox next to the answer option that will trigger the extra text box to show up as shown below.

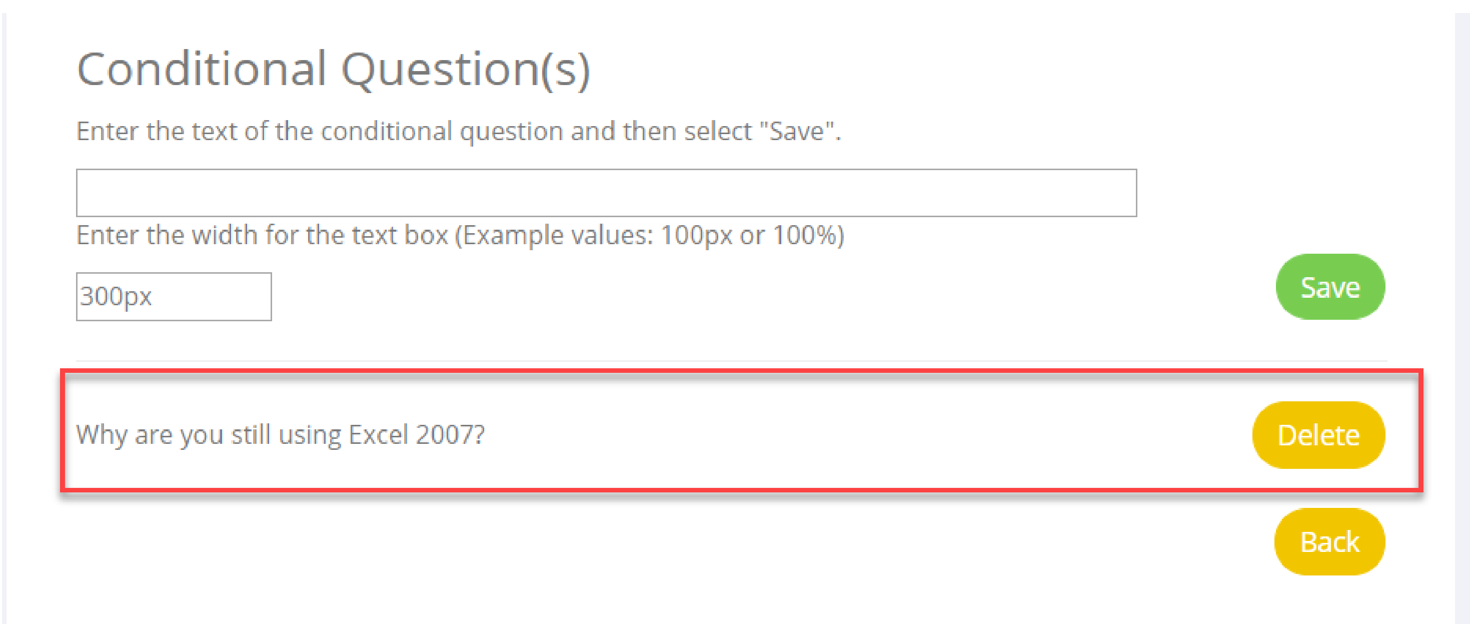


Then enter the text that will display next to the new text box, and set the width of the text box. Then click "Save" as shown below.

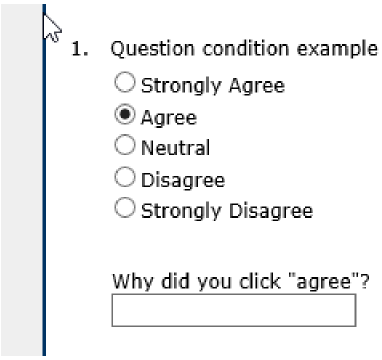


That's it.

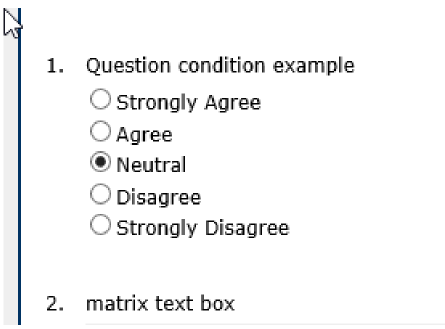
To update a question condition, click the "Update" button to the right of the condition. To delete a question condition, click the "Delete" button to the right of the condition as shown below:



On the survey, when the respondent clicks that answer, it will dynamically display the text box below the question.

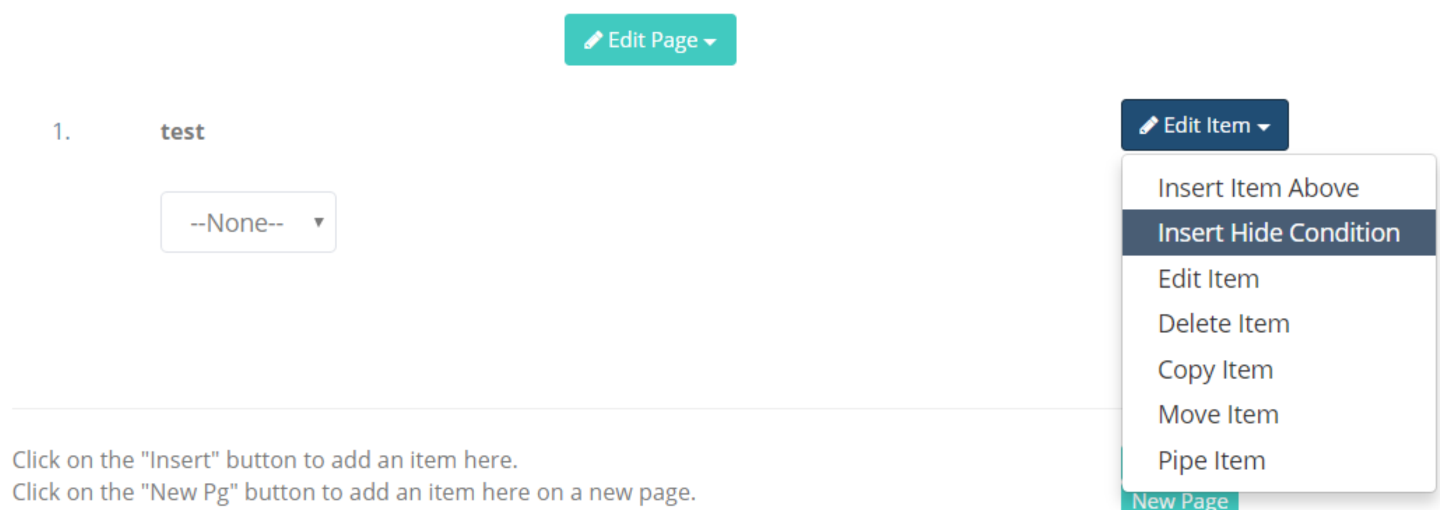


If the selection is not selected, the conditional text box does not appear:

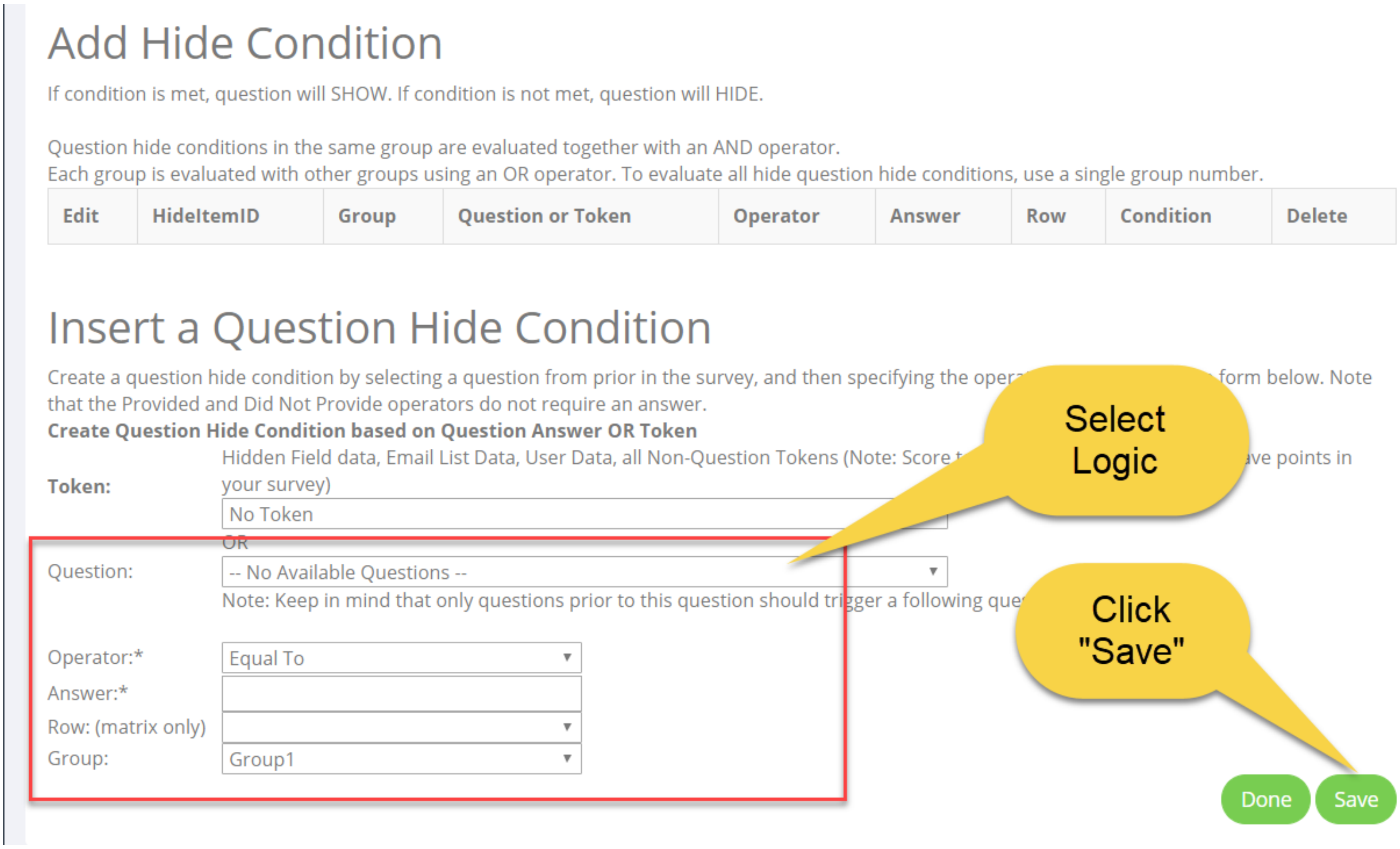


Hide/Show on Same Page Question Conditions

To hide or show a question in the same page with a triggering question, click to insert a hide/show question.



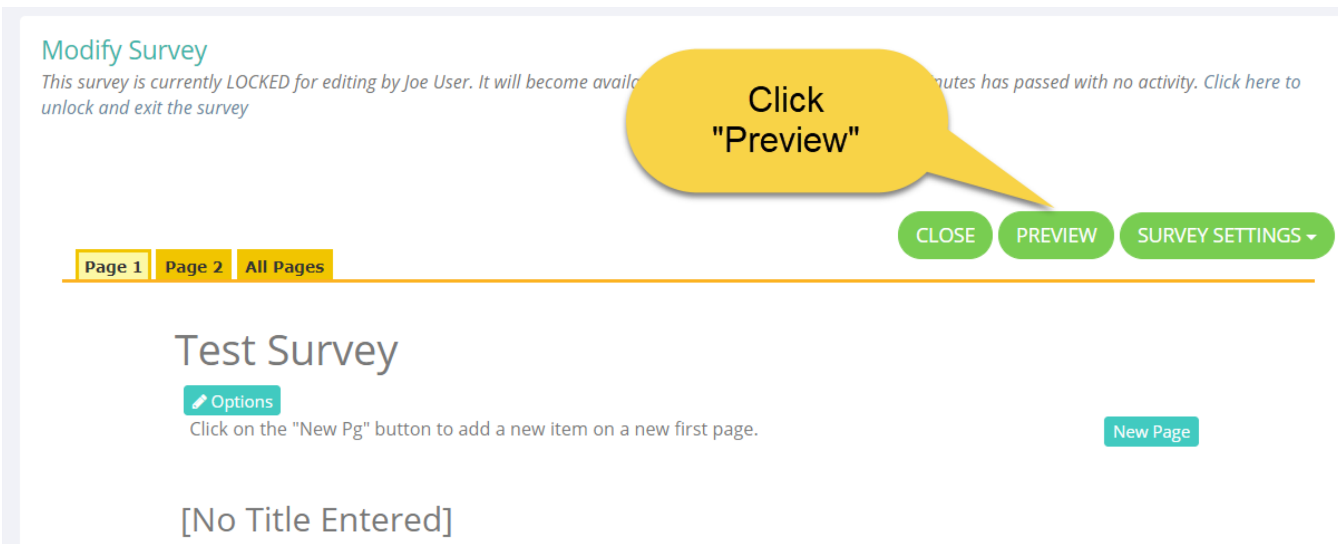
Then select the triggering question and answer that will cause this question to appear, or disappear dynamically on this page without a postback.



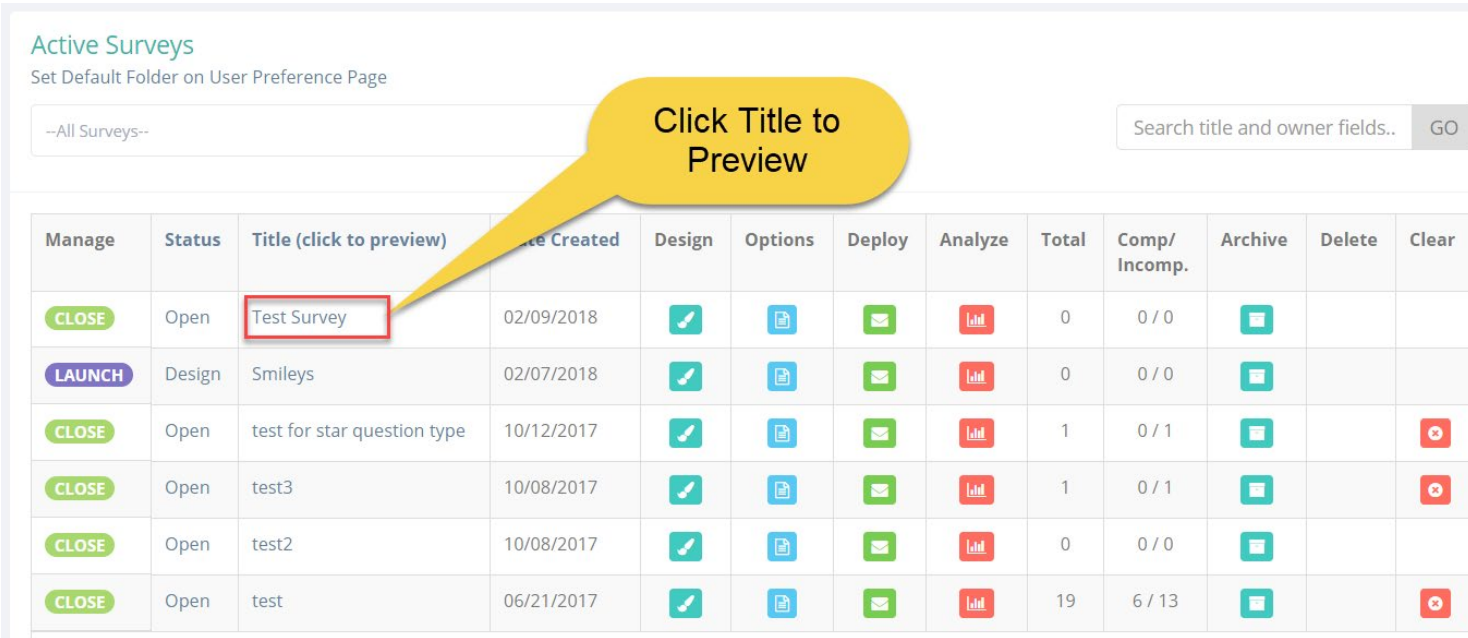
Preview Your Survey

Click **Preview** to see how the survey will actually appear to the users. There is also a link on the survey title in the survey list page where you can preview the survey. You must click the “launch” button to launch the survey before you can preview it.

On the survey options page you can set the survey start and end date or close the survey by clicking the close button. If the survey is closed, or if the survey start and end dates are over, then the respondent will see a “Survey Not Live” message when trying to preview.



Alternatively, click the link of the survey name in the survey list page.



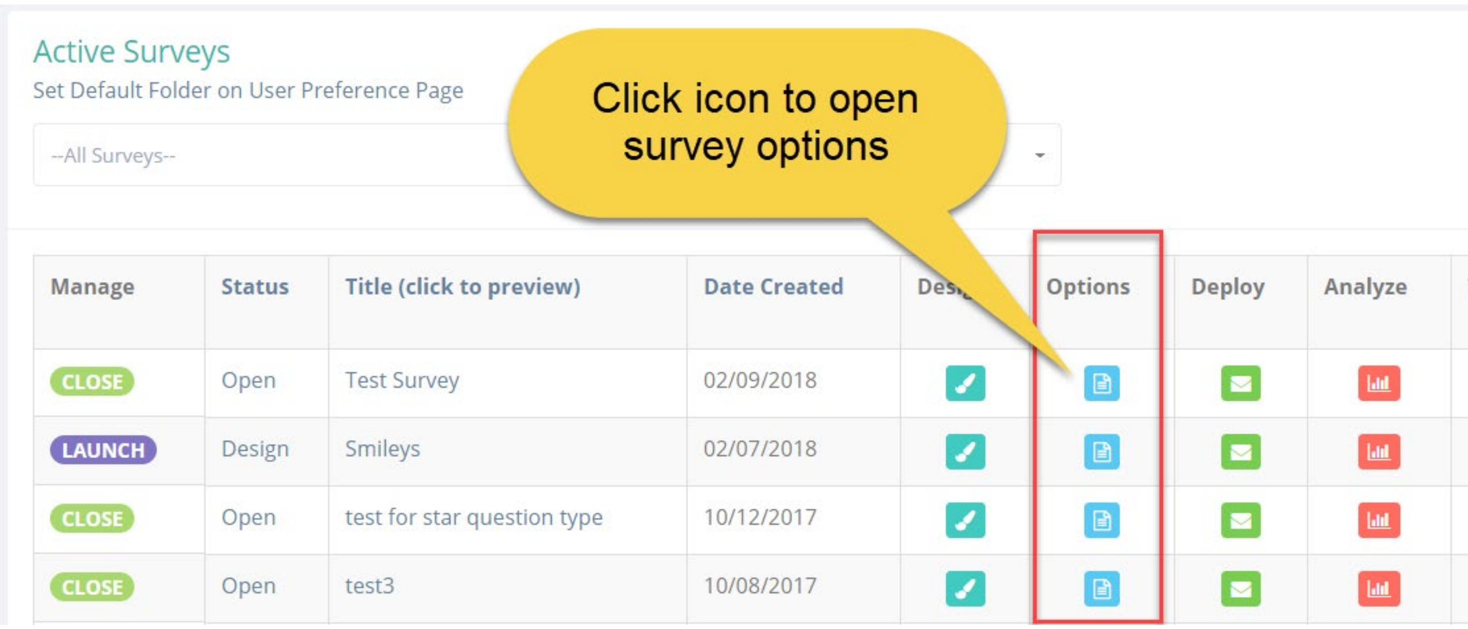
Manage	Status	Title (click to preview)	te Created	Design	Options	Deploy	Analyze	Total	Comp/ Incomp.	Archive	Delete	Clear
CLOSE	Open	Test Survey	02/09/2018					0	0 / 0			
LAUNCH	Design	Smileys	02/07/2018					0	0 / 0			
CLOSE	Open	test for star question type	10/12/2017					1	0 / 1			
CLOSE	Open	test3	10/08/2017					1	0 / 1			
CLOSE	Open	test2	10/08/2017					0	0 / 0			
CLOSE	Open	test	06/21/2017					19	6 / 13			

Set Survey Options

The survey options page contains all of the settings for this survey. To get to the survey options page you can click the “Options” button on the modify survey page.

Or, you can get to the Survey Options page by clicking the **Edit** button next to the survey title when you are in **Design mode**.

Or by clicking the **Options** button on the **Manage Surveys** page.



Before you deploy your survey you must select the **Survey Options.** The settings you should check should include:

General Tab:

- Change the **Status** from open to close
- Set the **Start/End Date**
- Indicate survey **Owners** *(If you make someone else an owner of your survey they can edit and delete it and view reports)*
- Security: Restricted to Owners or Public
- Language – select the language for the survey
- Admin Email for “From” emails for survey completion emails.

Display Tab:

- Choose Template for survey design layout
- Choose **Navigation** buttons
- **Numbering** options

Access Tab:

- Choose the **Respondent Access Level** - *Do you want to require that the respondent log in or do you want to allow anonymous access? Do you want the person to be able to respond only once or can they respond more than once? Do you want to allow someone to return to an incomplete survey so that they can finish it?*
- Choose whether to show this survey in the user workspace.
- Survey restrictions by user, group or IP address
- Max responses for all users/Max responses per user
- Timed surveys

Completion Tab:

- Set the **Completion Action** and **Completion Message/URL**
- Indicate who to send the **Responses** to

ActiveLogic Tab:

- Configure ActiveLogic completion workflow

Report Tab:

- **Report** format (bar/pie default)
- **Alias text** display option

Advanced Tab:

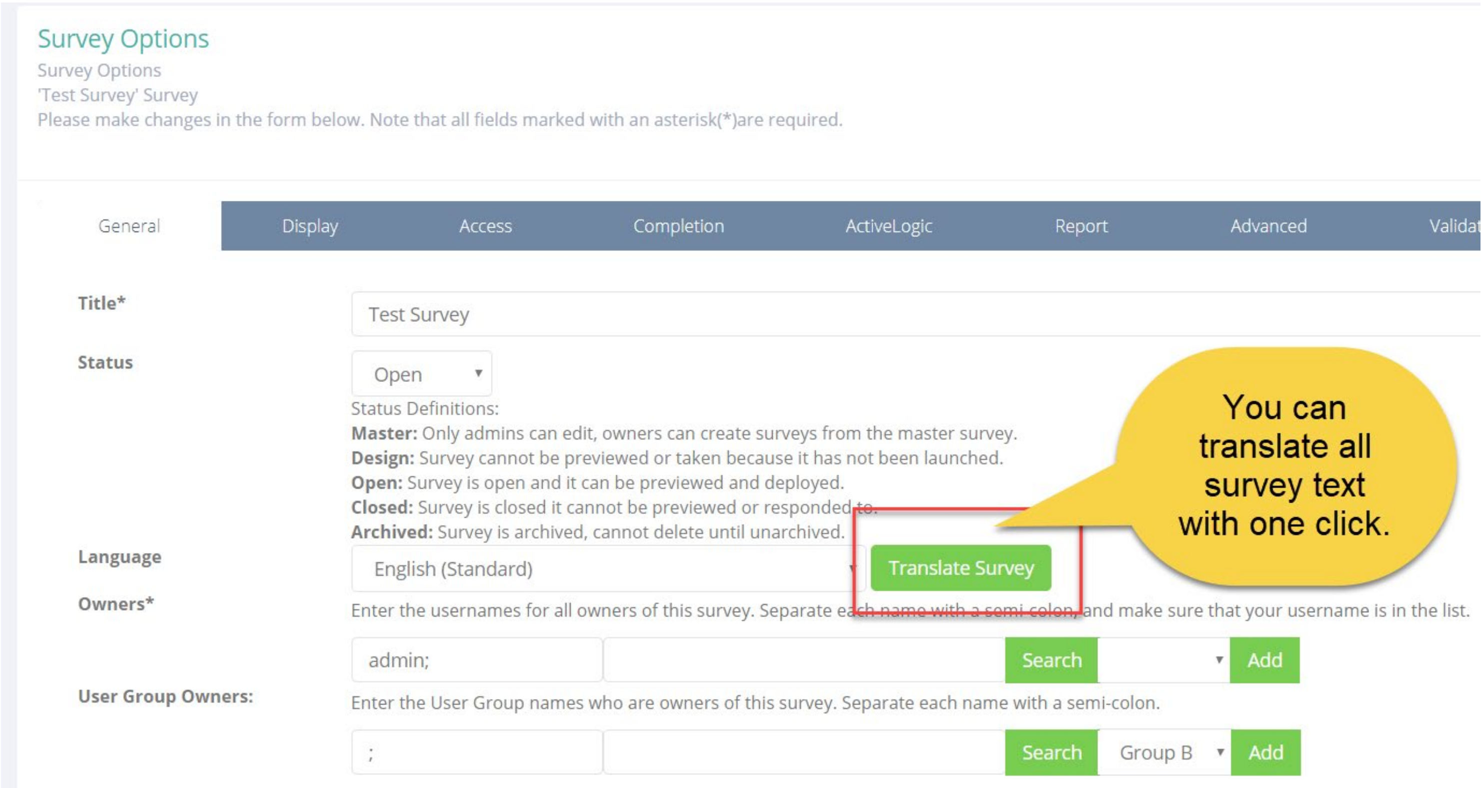
- Hidden Fields
- Dynamic Tokens
- Survey Review

Validation Tab:

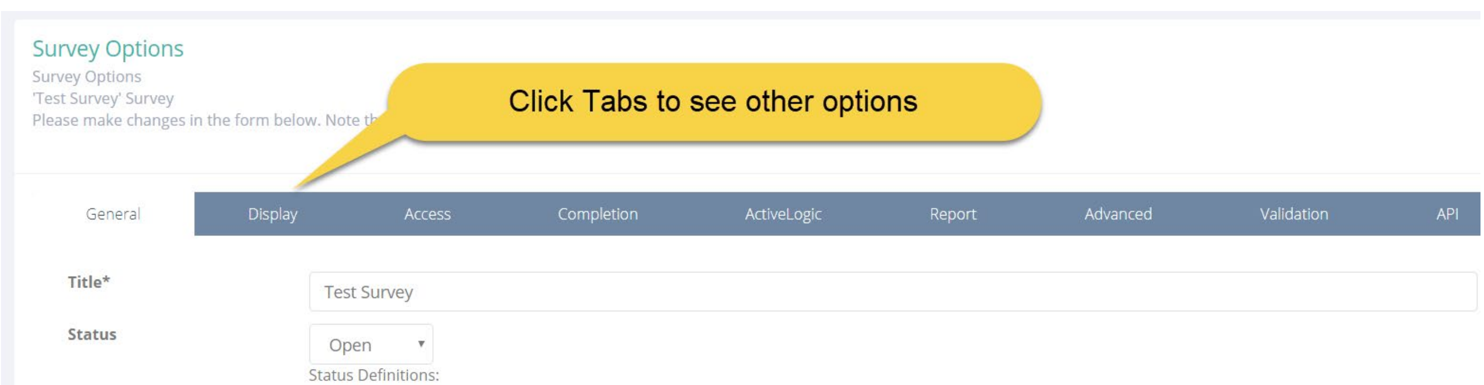
- Automatic test/fix for reporting issues
- Soft and Hard validation
  - Soft – warns user before continuing
  - Hard – Doesn't let user advance until completed

From the modify survey page you can click "OPTIONS" button to get to the survey options page.

The survey options page contains all of the settings for this survey.



To see the other options, click the tabs as shown below:



Deploy Your Survey

One way to send your survey to a group is to paste the URL in an email to them. If your survey is open to anyone, you can allow anonymous access (no log in required).

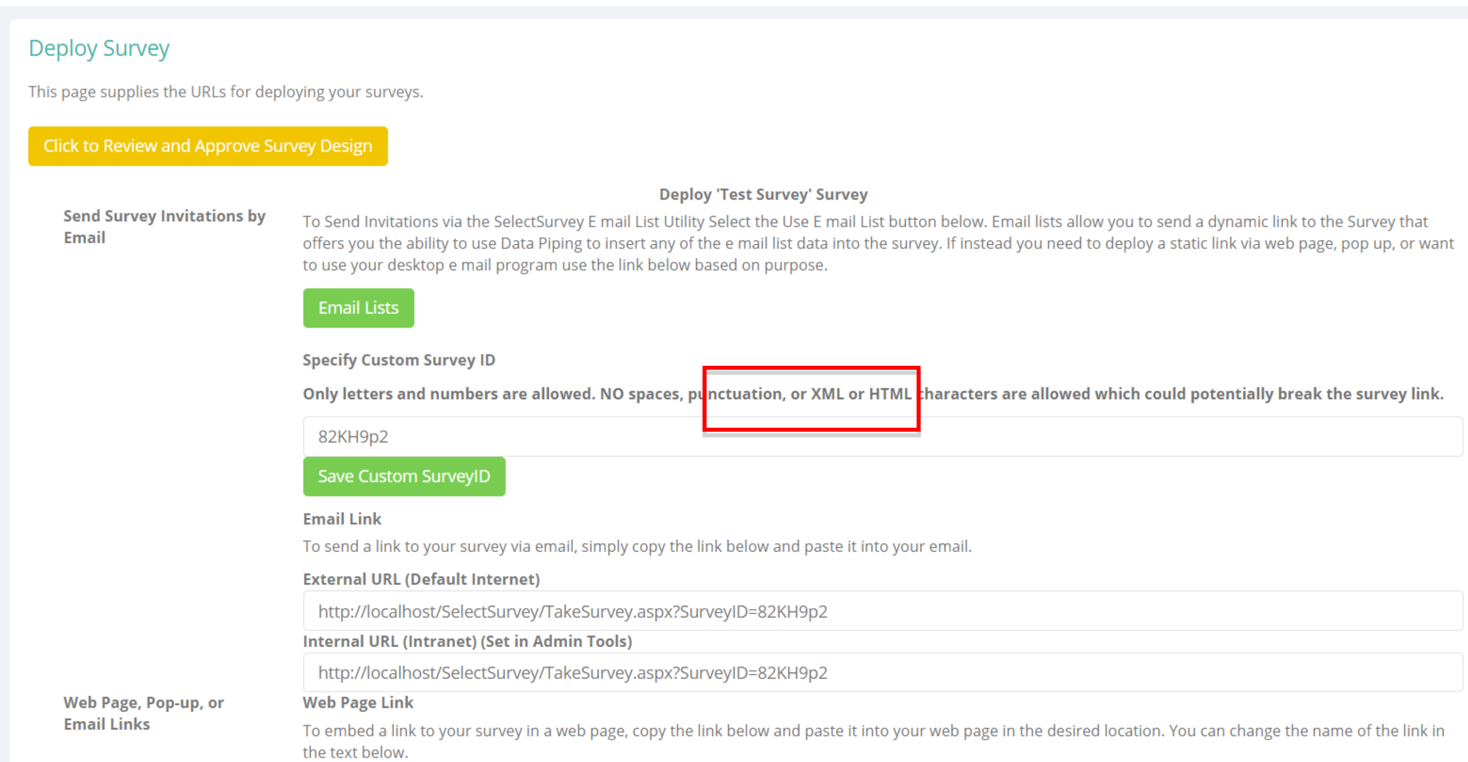
Click **Deploy** and copy the URL assigned to the survey (you'll notice the **Survey ID** within the URL)

You can also use import an email list and send through the system. If you would like to do this, after selecting **Deploy**, select **Email Lists** and you can import or create a list to deploy to. This function will also let you set options to track completions and edit the email message.

You can also use any 3rd party email system to deploy the survey via the Email Lists page.

You can also deploy by SMS Text to yourself, and forward to a SMS Text list from your phone.

Note: Email Lists/Email List deployment are covered in the "Power User Training"



Deploy Tiny URLs
There is also a URL Rewriter feature at the bottom of the deploy page, where you can specify a short/clean URL: (This is covered in the Power User Training)

URL REWRITER

Create a clean short URL.

Example:
http://localhost/SelectSurvey/ClientName
instead of:
http://localhost/SelectSurvey/TakeSurvey.aspx?SurveyID=123
Existing Custom URLs for this Survey:

Route Name	Route URL	Route Physical File	Route Survey ID	Delete

You do not currently have any URL routes.

URL Shortcut Path Text: No spaces, empty values or special characters allowed, this will be used in the URL path. Example:

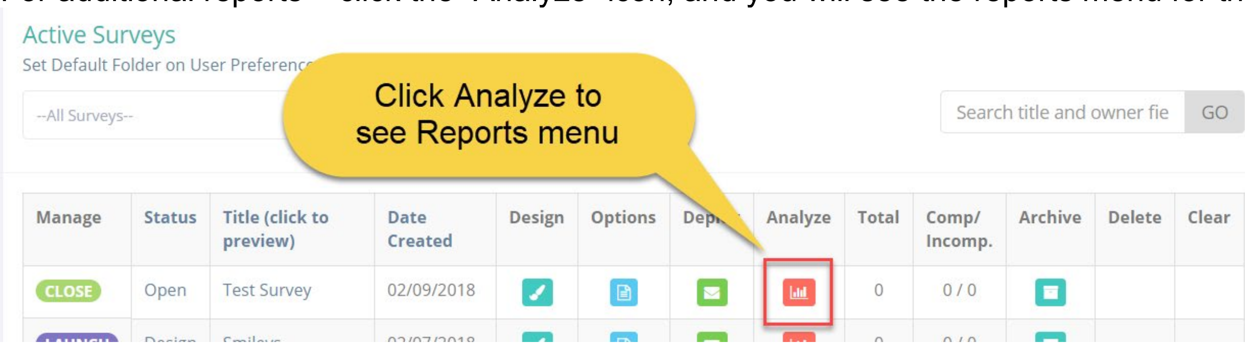
http://localhost/SelectSurvey/ClientName
http://localhost/SelectSurvey/

Add URL Route

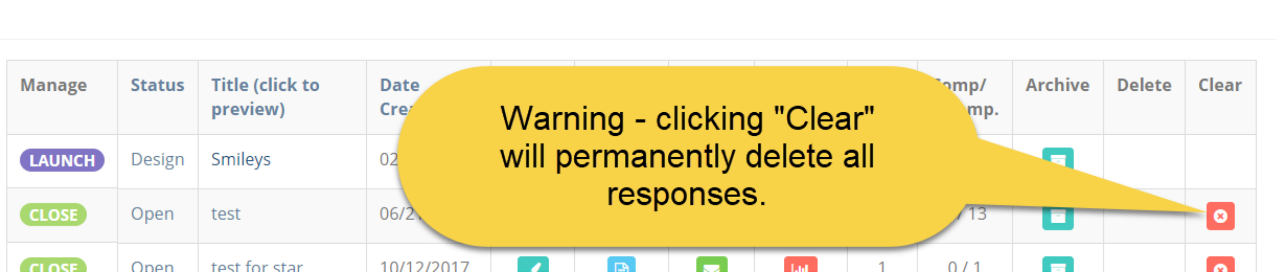
Monitor the Responses

You can see a quick summary of the response count for each survey on the **Manage Surveys** page under the Comp/Incomp. Column which lists the completed responses / incomplete response.

For additional reports – click the “Analyze” icon, and you will see the reports menu for that survey.



Warning - clicking the button below PERMANENTLY deletes all responses for the survey. Normally this is used after testing the survey, or when you want to clear all responses and redeploy. Most of the time you would save the responses and copy the survey to re-deploy instead.



Reports

SelectSurvey provides several report generators on the **Reports Menu**, giving you an ability to generate a number of standard and custom reports, including:

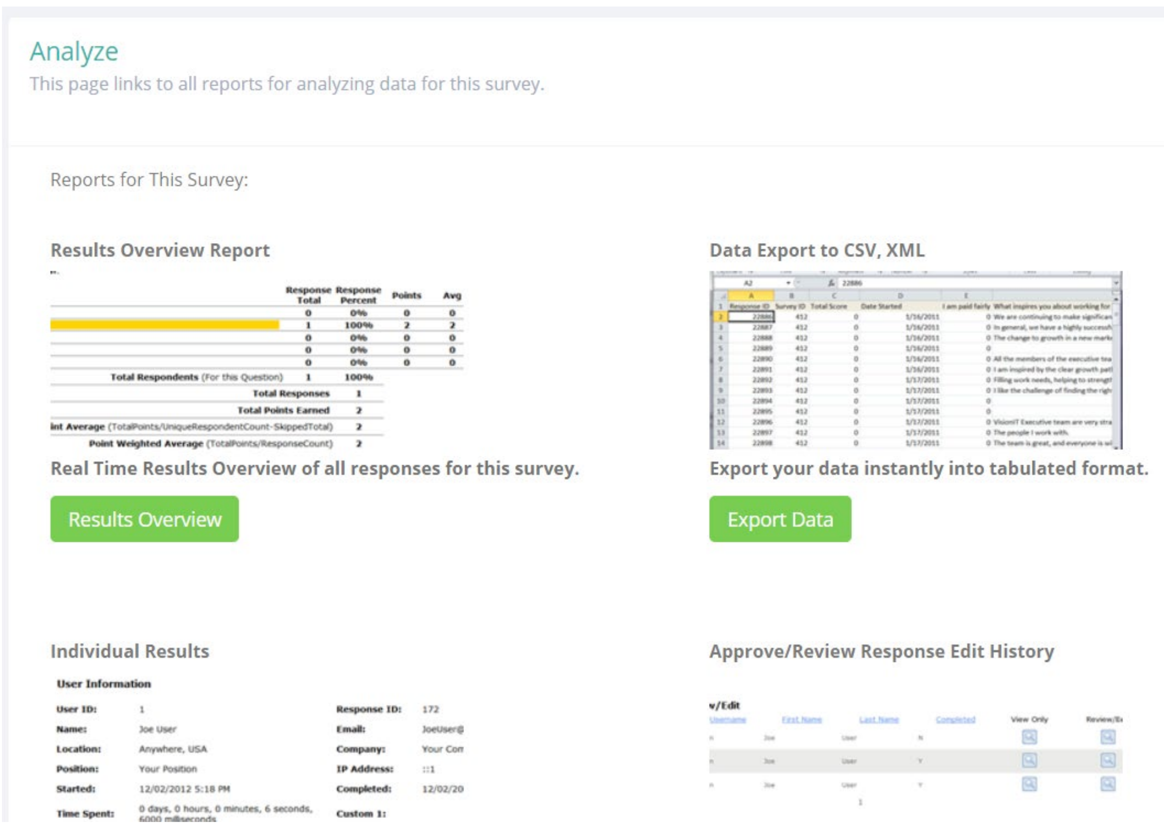
- all surveys taken by a particular user or response id
- summary of all responses for a survey
- the ability to:
  - **toggle** through **each response** to a survey
  - **select** which **questions** you want to display on the **report**
  - **analyze trends** by **comparing** two different **surveys**
  - **combine multiple surveys** for combined results on **one report**

- **create** your **own** custom **reports**
- **export** data to **CSV** or **XML** in several different export configuration formats
- **automatically populate an uploaded PDF with acro fields**

You can use a number of available options to create a report to suit your needs.

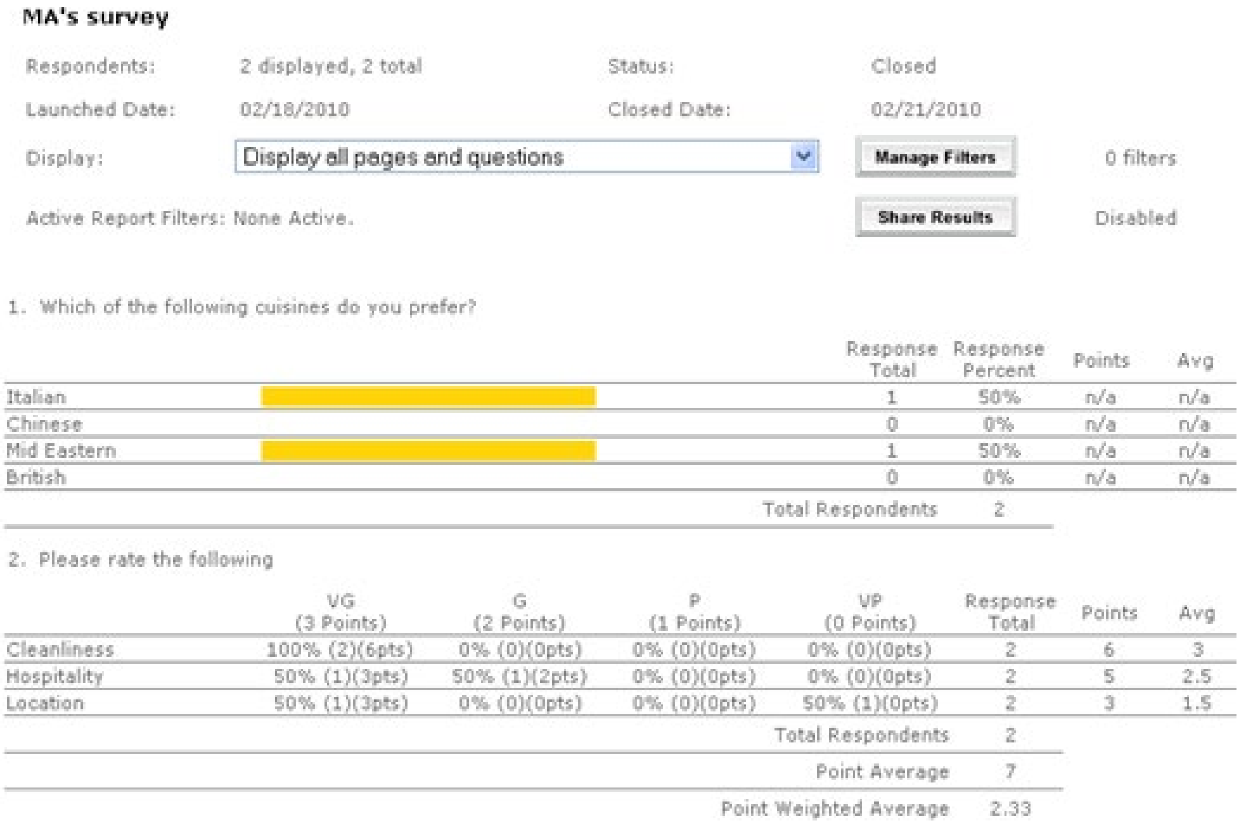
Click **Analyze** to see the reports menu for that survey. You will see the below report options:

- Results Overview
- Export Data
- Individual Responses
- Review Response
- Custom Reports
- Free Form Reports
- Report Shares



Results Overview

The Results Overview is a summary of all responses with totals of all responses for each question displayed. You can filter those responses by any question answer or token value by clicking the "Manage Filters" button.



MA's survey

Respondents:	2 displayed, 2 total	Status:	Closed
Launched Date:	02/18/2010	Closed Date:	02/21/2010
Display:	Display all pages and questions	Manage Filters	0 filters
Active Report Filters: None Active.		Share Results	Disabled

1. Which of the following cuisines do you prefer?

	Response Total	Response Percent	Points	Avg
Italian	1	50%	n/a	n/a
Chinese	0	0%	n/a	n/a
Mid Eastern	1	50%	n/a	n/a
British	0	0%	n/a	n/a
Total Respondents	2			

2. Please rate the following

	VG (3 Points)	G (2 Points)	P (1 Points)	VP (0 Points)	Response Total	Points	Avg
Cleanliness	100% (2)(6pts)	0% (0)(0pts)	0% (0)(0pts)	0% (0)(0pts)	2	6	3
Hospitality	50% (1)(3pts)	50% (1)(2pts)	0% (0)(0pts)	0% (0)(0pts)	2	5	2.5
Location	50% (1)(3pts)	0% (0)(0pts)	0% (0)(0pts)	50% (1)(0pts)	2	3	1.5
				Total Respondents	2		
				Point Average	7		
				Point Weighted Average	2.33		

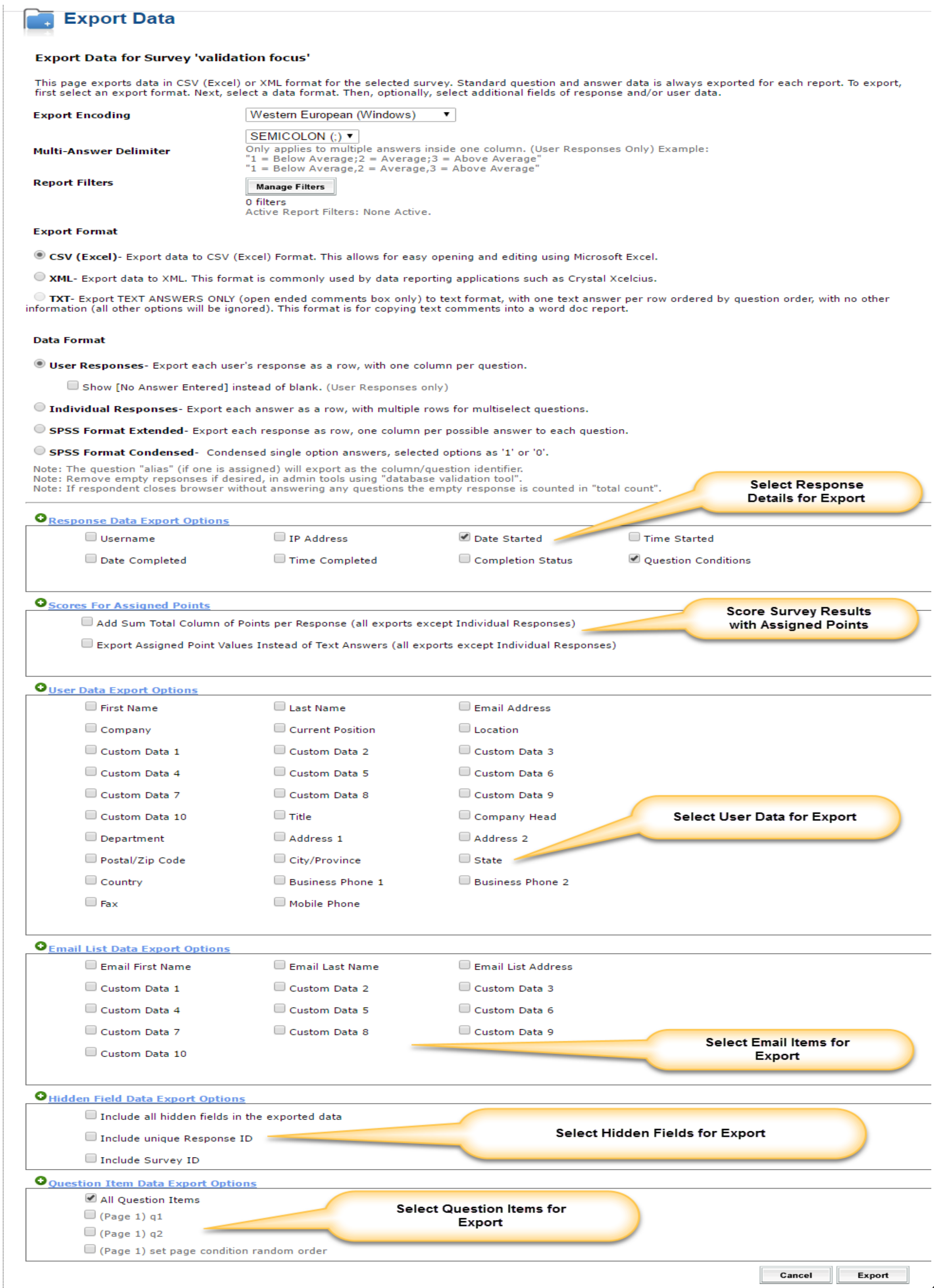
Print Reports

There are print buttons on all of the reports.   You can also print out a blank survey from the modify survey page print screen.

Export Data

Click **Export Data** to export the data to CSV (Excel) or XML format.

- Choose the **Export Format, Data Format and Response/User Data**
- If this is a “scored” survey you can include the sum and point values
- Click **Export**


Export Data
Export Data for Survey 'validation focus'
This page exports data in CSV (Excel) or XML format for the selected survey. Standard question and answer data is always exported for each report. To export, first select an export format. Next, select a data format. Then, optionally, select additional fields of response and/or user data.
Export Encoding
Western European (Windows)
Multi-Answer Delimiter
SEMICOLON (;)
Only applies to multiple answers inside one column. (User Responses Only) Example:
"1 = Below Average;2 = Average;3 = Above Average"
"1 = Below Average,2 = Average,3 = Above Average"
Report Filters
Manage Filters
0 filters
Active Report Filters: None Active.
Export Format
CSV (Excel)- Export data to CSV (Excel) Format. This allows for easy opening and editing using Microsoft Excel.
XML- Export data to XML. This format is commonly used by data reporting applications such as Crystal Xcelcius.
TXT- Export TEXT ANSWERS ONLY (open ended comments box only) to text format, with one text answer per row ordered by question order, with no other information (all other options will be ignored). This format is for copying text comments into a word doc report.
Data Format
User Responses- Export each user's response as a row, with one column per question.
Show [No Answer Entered] instead of blank. (User Responses only)
Individual Responses- Export each answer as a row, with multiple rows for multiselect questions.
SPSS Format Extended- Export each response as row, one column per possible answer to each question.
SPSS Format Condensed- Condensed single option answers, selected options as '1' or '0'.
Note: The question "alias" (if one is assigned) will export as the column/question identifier.
Note: Remove empty repsonses if desired, in admin tools using "database validation tool".
Note: If respondent closes browser without answering any questions the empty response is counted in "total count".
Select Response Details for Export
Response Data Export Options
Username
IP Address
Date Started
Time Started
Date Completed
Time Completed
Completion Status
Question Conditions
Scores For Assigned Points
Score Survey Results with Assigned Points
Add Sum Total Column of Points per Response (all exports except Individual Responses)
Export Assigned Point Values Instead of Text Answers (all exports except Individual Responses)
User Data Export Options
First Name
Last Name
Email Address
Company
Current Position
Location
Custom Data 1
Custom Data 2
Custom Data 3
Custom Data 4
Custom Data 5
Custom Data 6
Custom Data 7
Custom Data 8
Custom Data 9
Custom Data 10
Title
Company Head
Select User Data for Export
Department
Address 1
Address 2
Postal/Zip Code
City/Province
State
Country
Business Phone 1
Business Phone 2
Fax
Mobile Phone
Email List Data Export Options
Email First Name
Email Last Name
Email List Address
Custom Data 1
Custom Data 2
Custom Data 3
Custom Data 4
Custom Data 5
Custom Data 6
Custom Data 7
Custom Data 8
Custom Data 9
Custom Data 10
Select Email Items for Export
Hidden Field Data Export Options
Include all hidden fields in the exported data
Include unique Response ID
Select Hidden Fields for Export
Include Survey ID
Question Item Data Export Options
All Question Items
(Page 1) q1
Select Question Items for Export
(Page 1) q2
(Page 1) set page condition random order
Cancel
Export

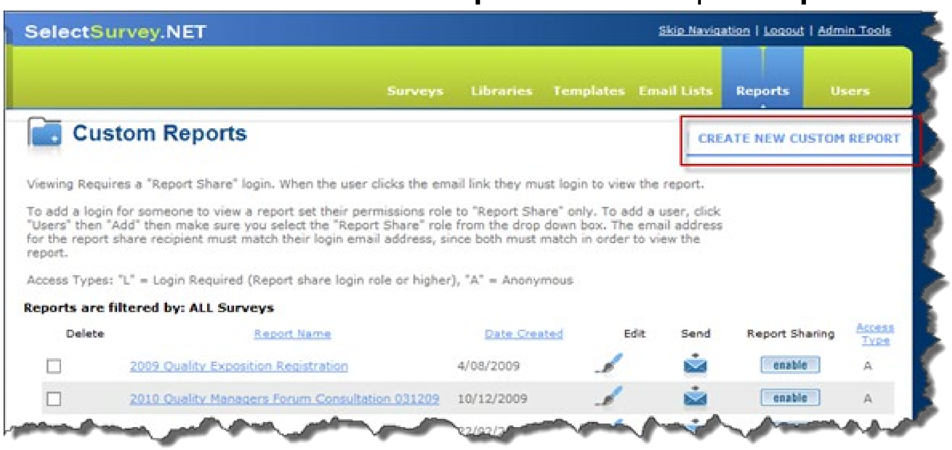
Custom Reports

Custom reports to create, save and email Custom Reports, limit reporting to specific questions and report filters and lets you specify graph type for each question. They also allow you to view all text responses on the same report, unlike the overview report summary, where you have to drill down to see text responses.

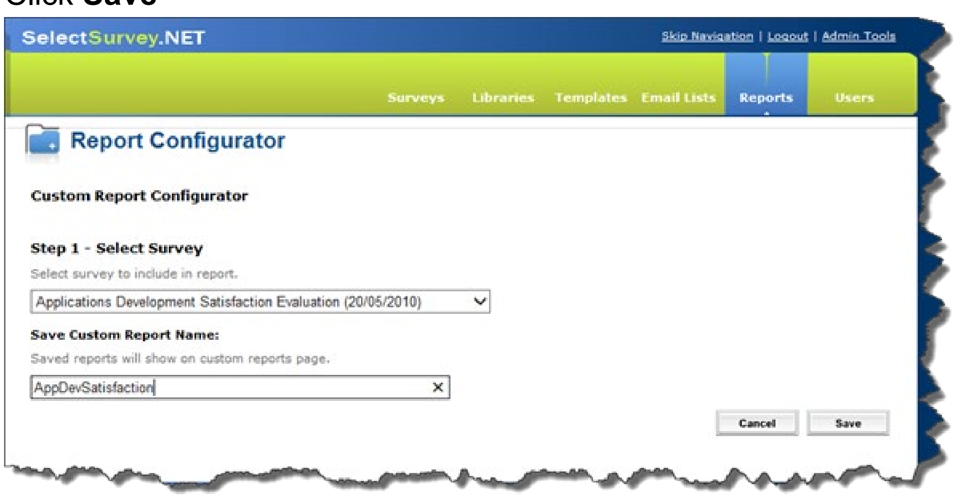
Custom reports also have html and PDF view/print options (2.0 .net framework or greater). You can save and edit custom report configurations and share the results with others. If you intend to share the results with others you must enable this feature first and then create a report share list.

Step 1 – Create the report

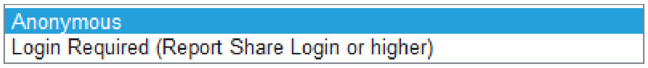
1. Click **Create New Custom Report** button to open **Report Configurator**



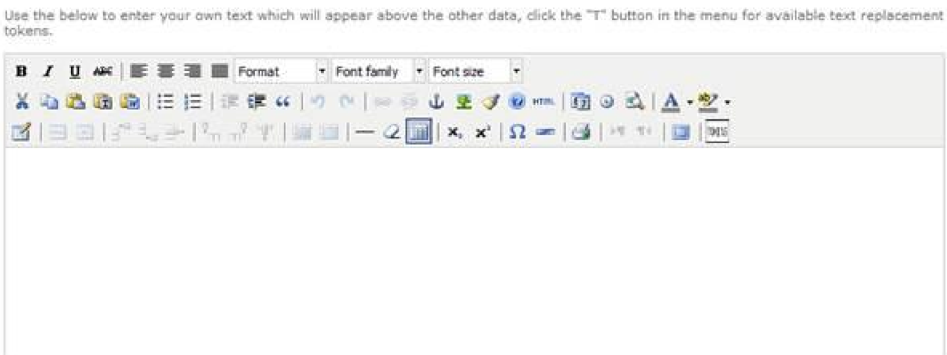
2. Select the survey from available surveys
3. Enter a name for the report (you can have multiple reports based on the same survey)
4. Click **Save**



5. Select ALL options from Custom Report Configurator for selected report
    - Access Type
    - Anonymous or Login

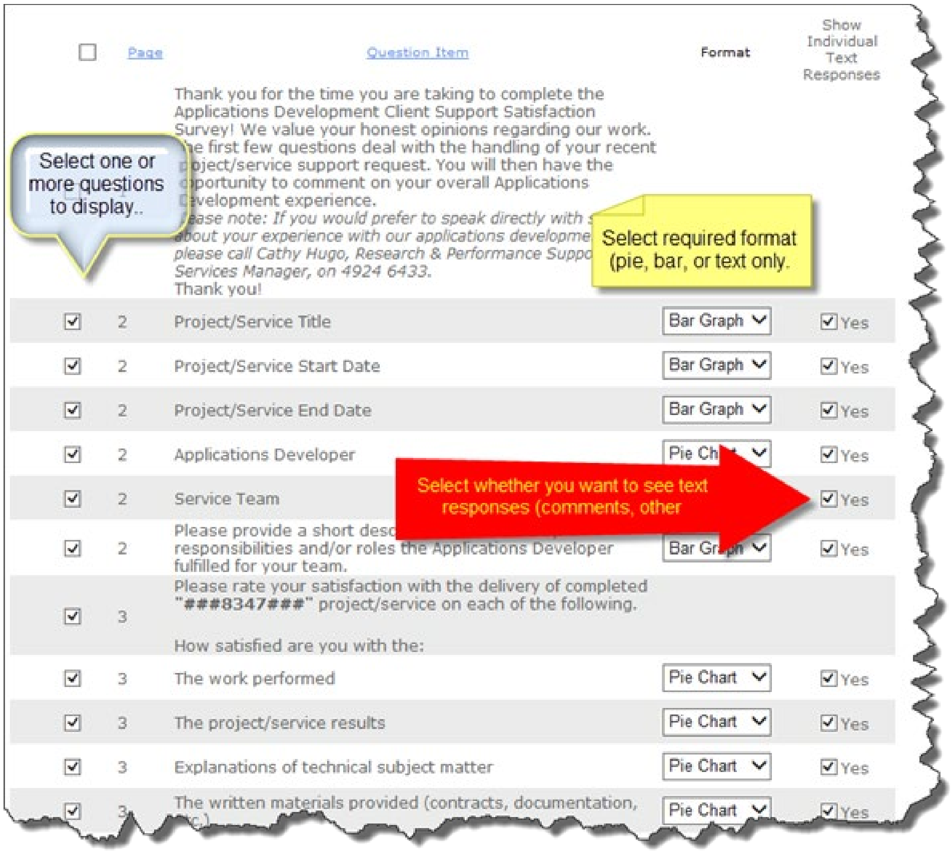


6. Add report Introduction (your own text which will appear above the other data)



Step 2 - Select and format question items to include in report

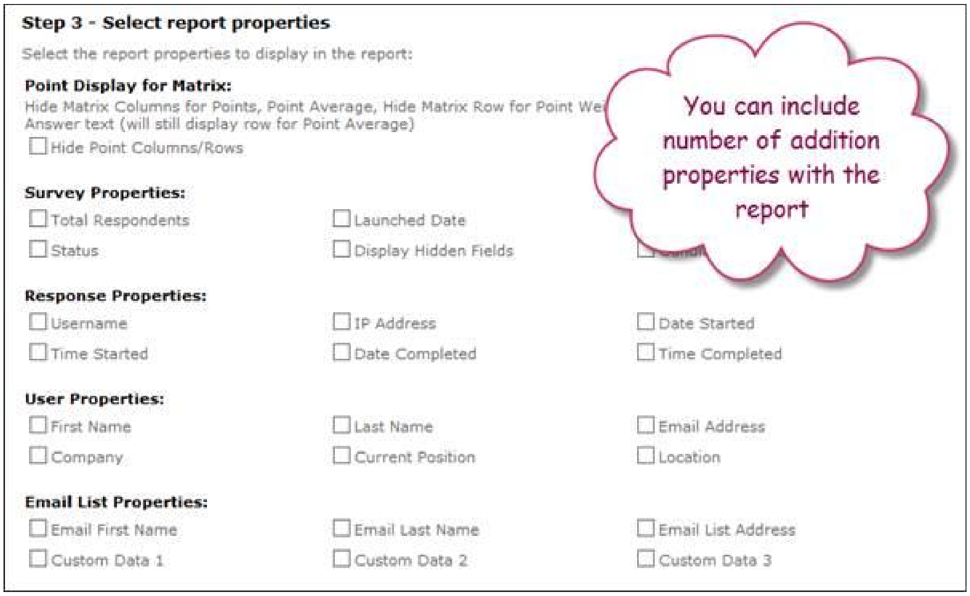
1. Select questions to display on your report (you can select one or more questions)
2. Set the format for each selected question.



*********In order to view the pie chart/bar graph reports you must set the Report Display type to Group Result format when creating the Custom Report.**

Step 3 - Select report properties

You can include number of addition properties with the report. Available information depends on survey set up. For example, you will not be able to view IP Address, Username, or Email Address if you ran the survey in forced Anonymous.



Step 4 - Save report

Click **Save** button to save report.

NOTE: When you first create a new report it will be disabled for view until you manually enable it. Make sure to click Enable button when you are ready to see and share results with others.

Step 5 - Run the report

Click on the name of the report you created under **Report Name** to see results (samples show below)

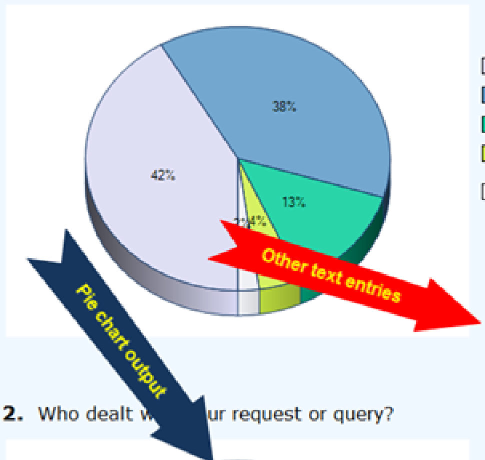
HNELHDSelectSurveyClientSatisfaction

Survey Title: HNELHD SelectSurvey Client Support Satisfaction Survey

Responses By Question Analysis:

NOTE: You can add your own text to custom reports which will appear above the other data.

1. When you needed support or information; did you usually?

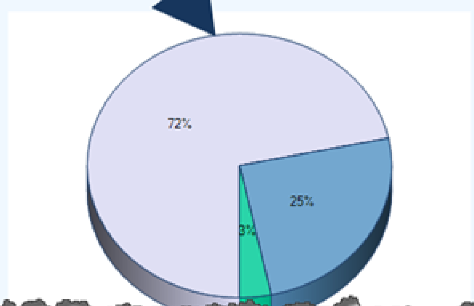


	Response Total	Response Percent
Email	37	73%
Phone	34	67%
Meet in person	12	24%
Use the website	4	8%
Other, please specify	2	4%
Total Respondents		51
(skipped this question)		33

use the help guide fo[illegible]vey select

Used the help manual extensively

2. Who dealt w[illegible]ur request or query?



	Response Total	Response Percent
John Fejsa	43	86%
Stephen Collard	15	30%
Other, please specify	2	4%
Total Respondents		50
(skipped this question)		34

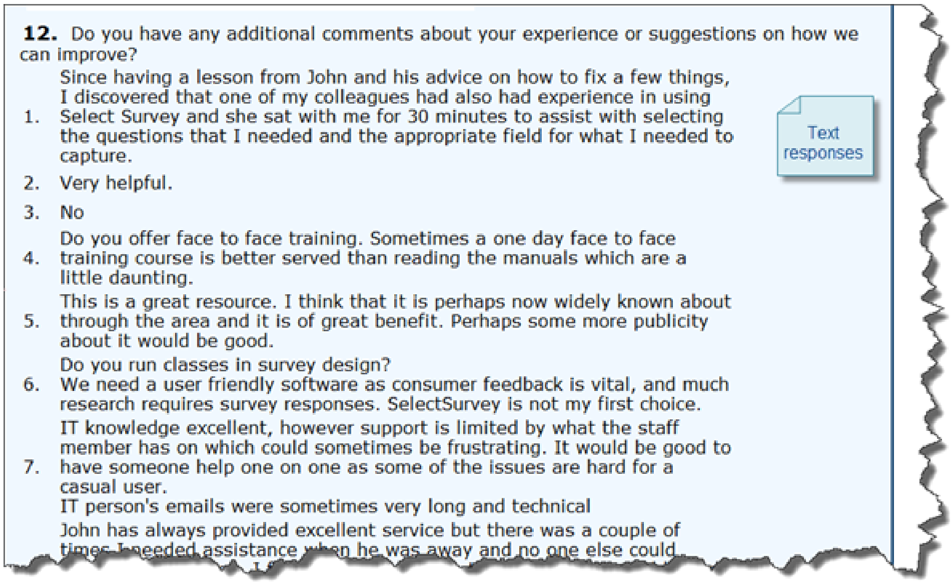
Stephen told me to call John.

unsure

3. You were satisfied with the courtesy of the IT staff member contacted

Bar chart options

	Response Total	Response Percent	Points	Avg
Strongly Agree	35	71%	n/a	n/a
Agree	14	29%	n/a	n/a
Disagree	0	0%	n/a	n/a
Strongly Disagree	0	0%	n/a	n/a
Total Respondents	49	100%		

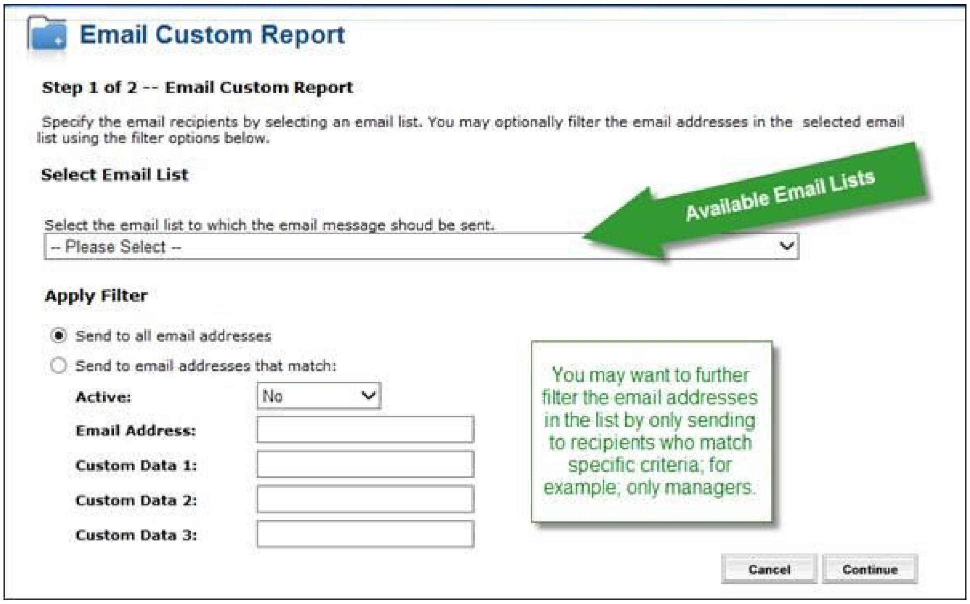


Step 6 – Share reports

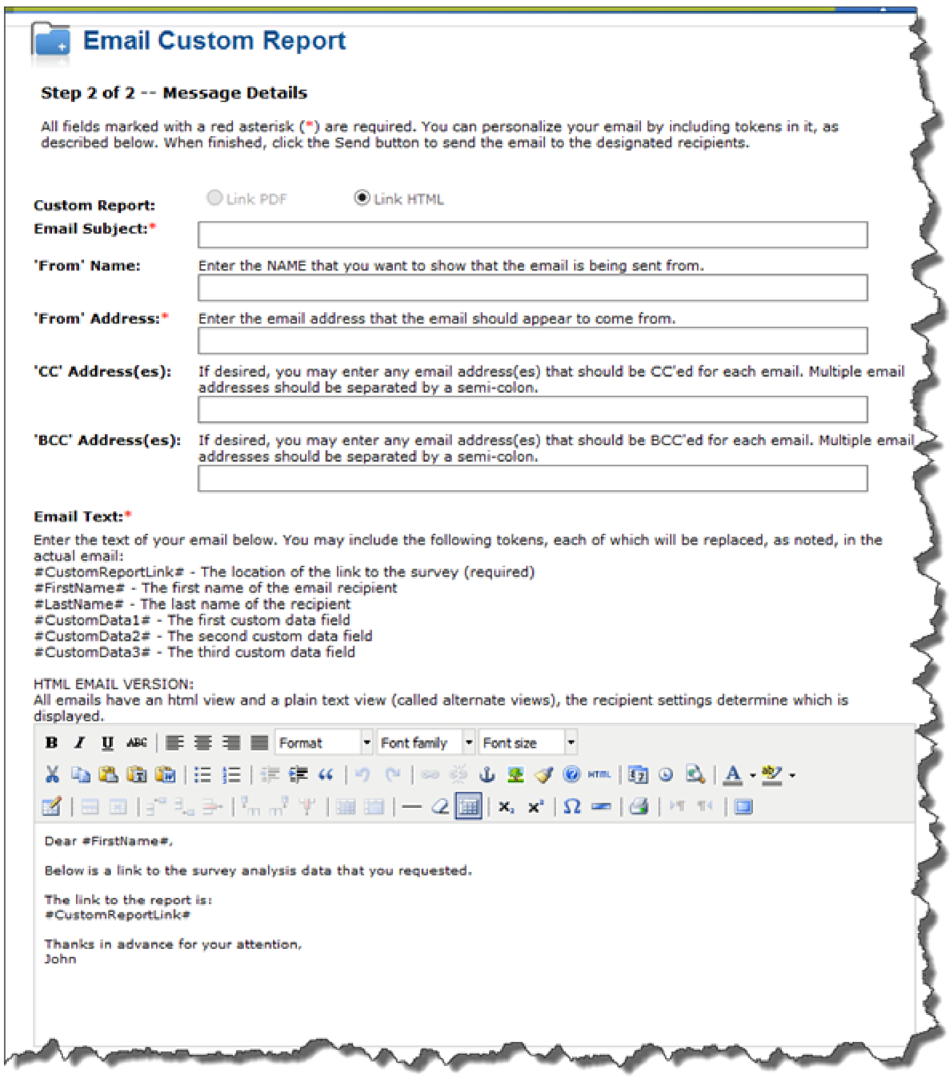
You can share produced reports with your colleagues by using saved email lists.

1. Click **Send** button in **Reports Menu** to set up and send the email with selected report

2. Select **Email List** and apply any required filters



3. Click **Continue** button
4. Set up **Message Details**



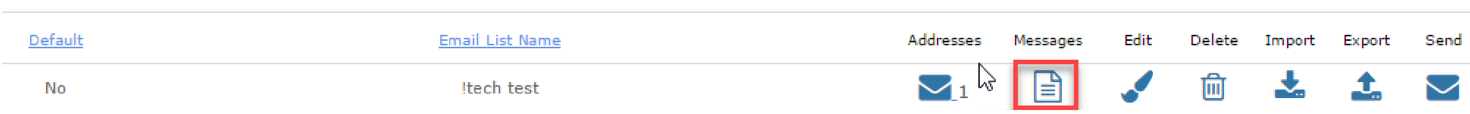
5. Click **Send** button to send the report to selected recipients.

Note. Both HTML and plain text versions of the email will be available to each recipient (called alternate views), the recipient computer will see the plain text version if HTML is disabled in their email program, which is sometimes the case with antivirus/spam programs.

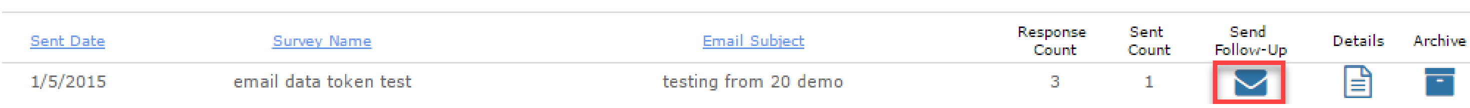
You can search for an email list by name using the search box shown below.

Once you have sent an email to an email list, you can send a follow up email to that email list.

From the manage email list page, click the messages icon to view sent messages.

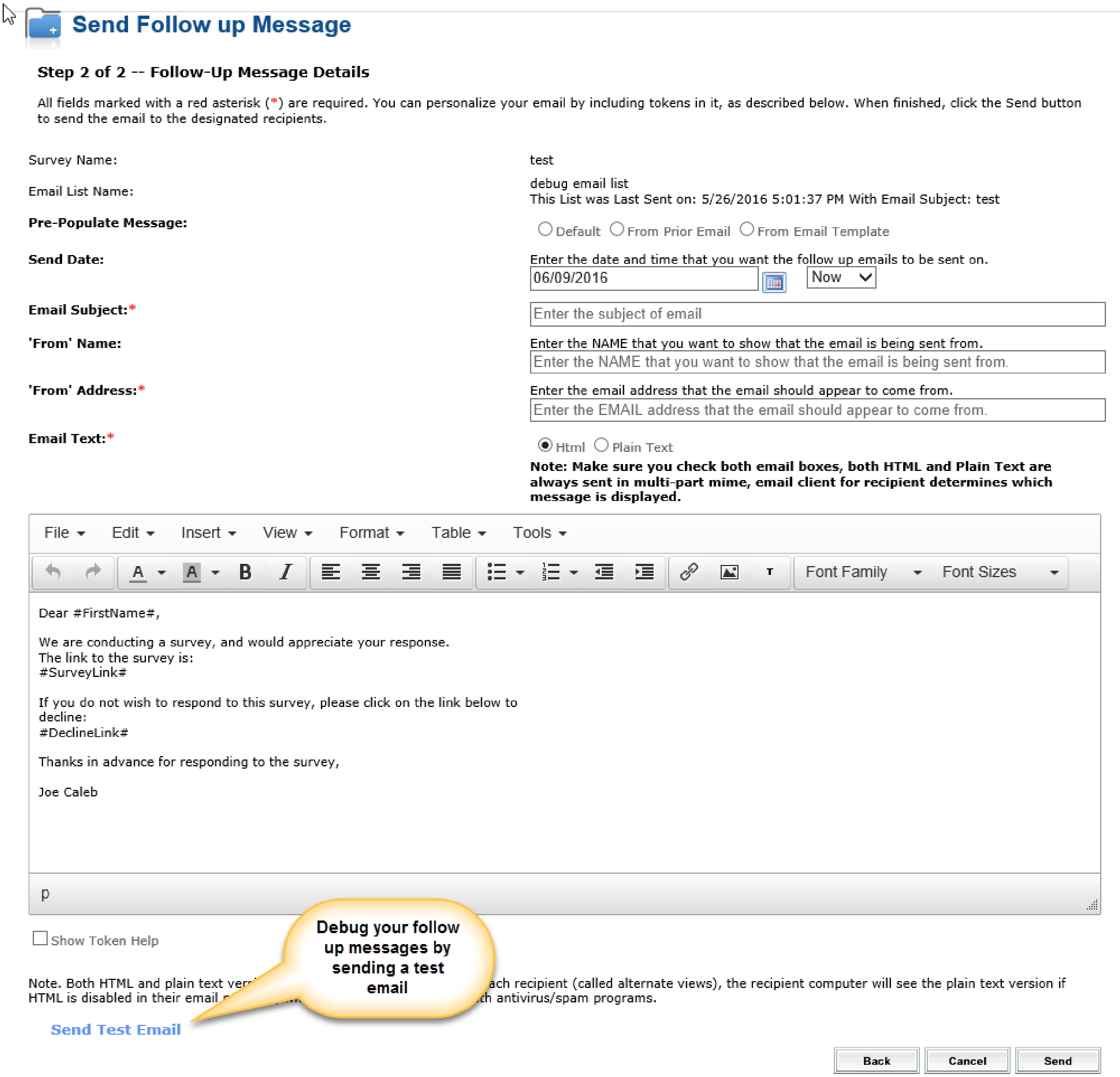


Then, from the Email Message List page, click the send follow up button.



This brings up options for sending a follow up message, as seen below.


SelectSurvey.NET
Skip Navigation | Logout | My Account | Admin Tools
Workspace
Surveys
Polls
Touch
Libraries
Templates
Email Lists
Reports
Users
Send Follow Up Message
Step 1 of 2 -- Select Statuses for Follow-Up Message
The subject of the original email message was 'testing from 20 demo'. Each recipient of the this email message has a status of No Response, Declined, or Responded. You can send a follow-up to the original recipients of this email message based on their current status. You must select at least one status from the list below.
Select Statuses
Select at least one status from the list below.
Write EID URLs to File - Does not send email, writes unique URLs to file. This will write the sent history to the table for tracking with the EID link from a third party email program.
No Response - Recipients who have not clicked on or responded to the original email message.
Responded - Recipients who have clicked on the link to the original email message.
Completed - Recipients who have completed the survey linked in the original email message.
Declined - Recipients who responded by declining to take the survey.
Exclude Opt-Outs - Exclude recipients who clicked to opt-out.
Exclude In-Active Emails - Exclude emails that were de-activated after the original email was sent.
Cancel
Continue



Free Form Reports

Free Form Reports are intended for 360 style aggregate score reporting. Typically an entire graphical report from Word or Excel is pasted into the textbox, then the scored/aggregate numbers are replaced by the "Survey Score and Sum Response Tokens", or the "360 Tokens" from the menu bar in the rich text box labelled "TOKENS". There are SCORE and SUM tokens for each cell of a matrix or question type that has points assigned to it, so that you can take a single column/row and aggregate those totals separately from the rest of the question. When the report is viewed, the tokens are replaced by the real time numeric calculated data from the responses.

To access the 360 Reporting tokens, click the "TOKENS" button in the rich text box on the report configuration page. Tokens available for question grouping and 360: Note that the 360 Question Categories, GAMP, ISO and Practice Levels must be set in the survey design for these tokens to work. The question category, practice level, GAMP and ISO can be set on the edit item page or the manage question categories page. See 360 Question Groups/Categories.

TOKEN	CHART TYPE
###RAD=SP###	Specific Practice Radar Chart
###GML=GP###	Generic Practice Final Levels Chart
###SML=SP###	Specific Practice Final Levels Chart
###PL=GP###	Generic Practice Response Breakdown Chart
###PL=SP###	Specific Practice Response Breakdown Chart
###SR=GAMP###	Response Breakdown Chart
###SR=ISO###	ISO Response Breakdown Chart

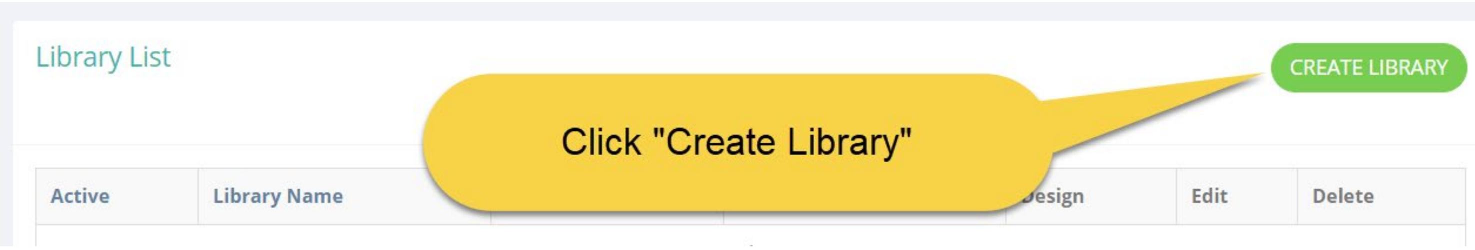
TOKEN	INDIVIDUAL VALUE DESCRIPTION
###SC=[see token menu]	Score Tokens
###SB=[see token menu]	Score Sub-Item Row Sum Tokens

###SL=[see token menu]	Score Column Sum Tokens
###SN=[see token menu]	Score Cell Tokens

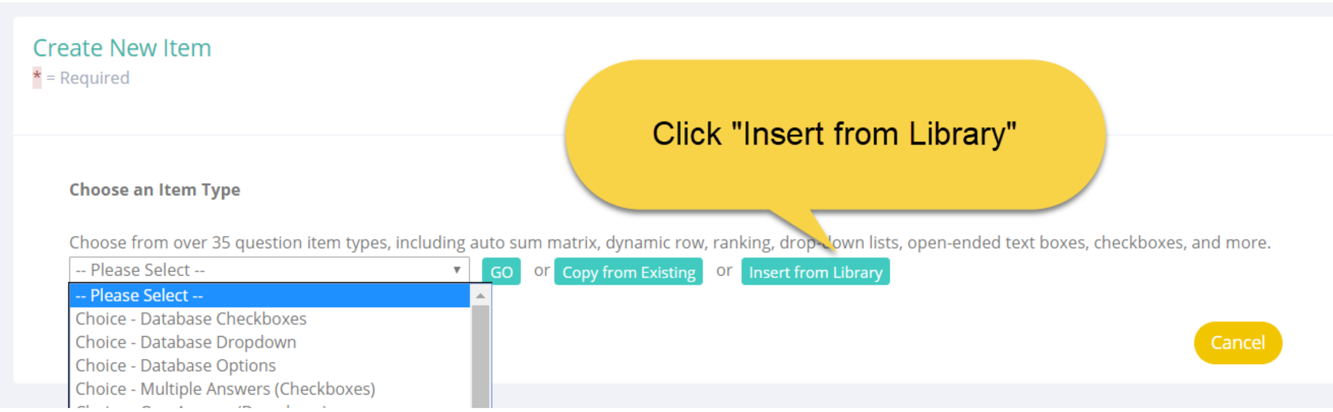
Question Library

You can create questions and keep them in a “Library” so that you can use them over and over again.

1. Click **Libraries**
2. Click **Create New Library**
3. Name the Library
4. Insert all of the questions that you’d like to include in this library



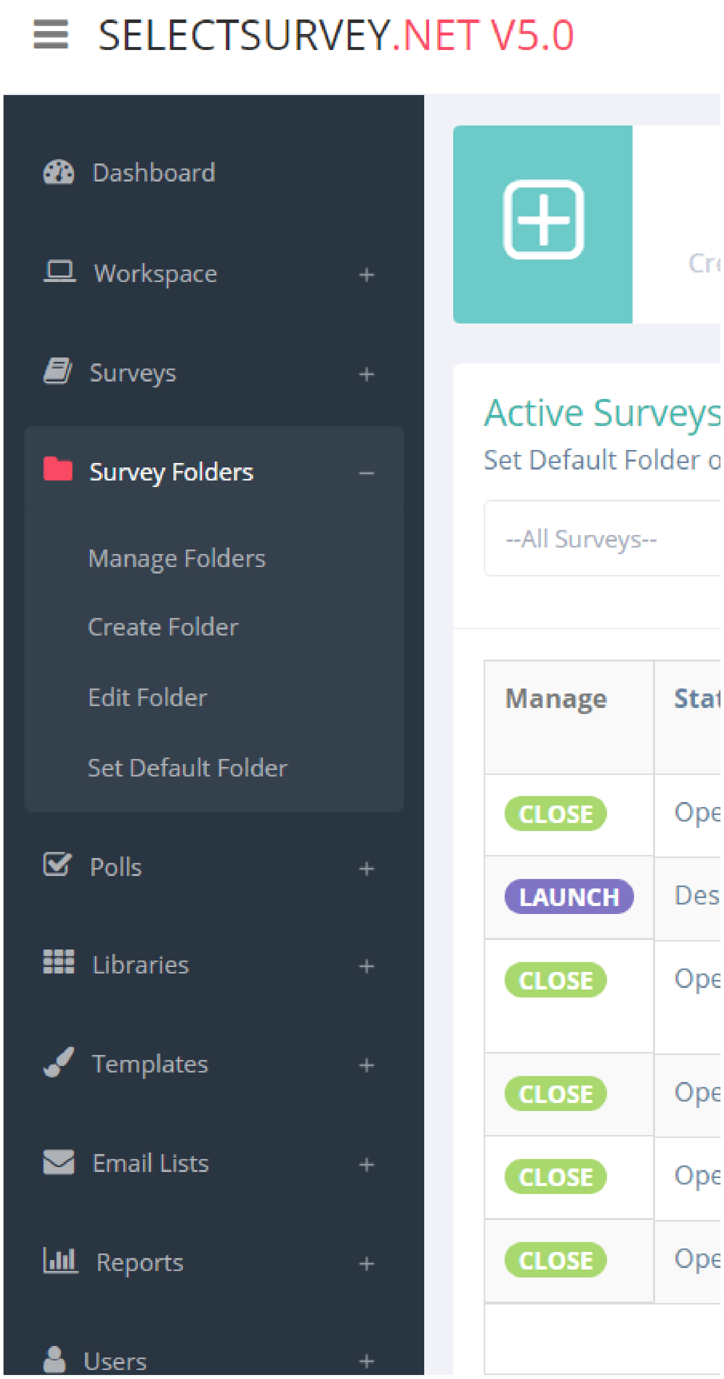
Now, when you are designing a survey click **Insert From Library** to select the question from the Library.



Organize Your Surveys into Folders

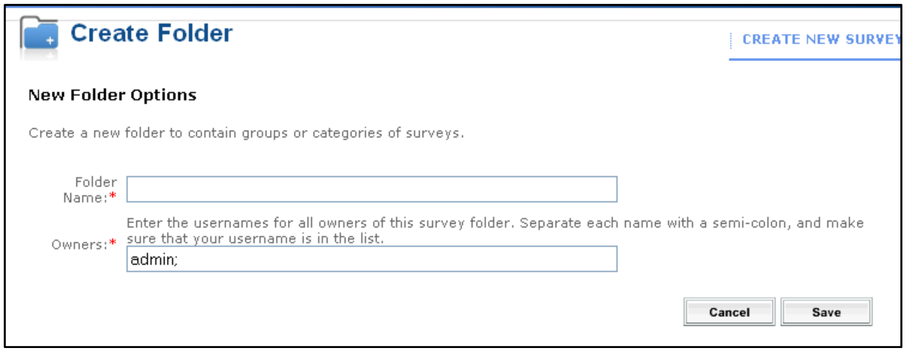
If you have a long list of surveys placing them into folders will help you stay organized.

From the Manage Surveys page click **Manage Folders**

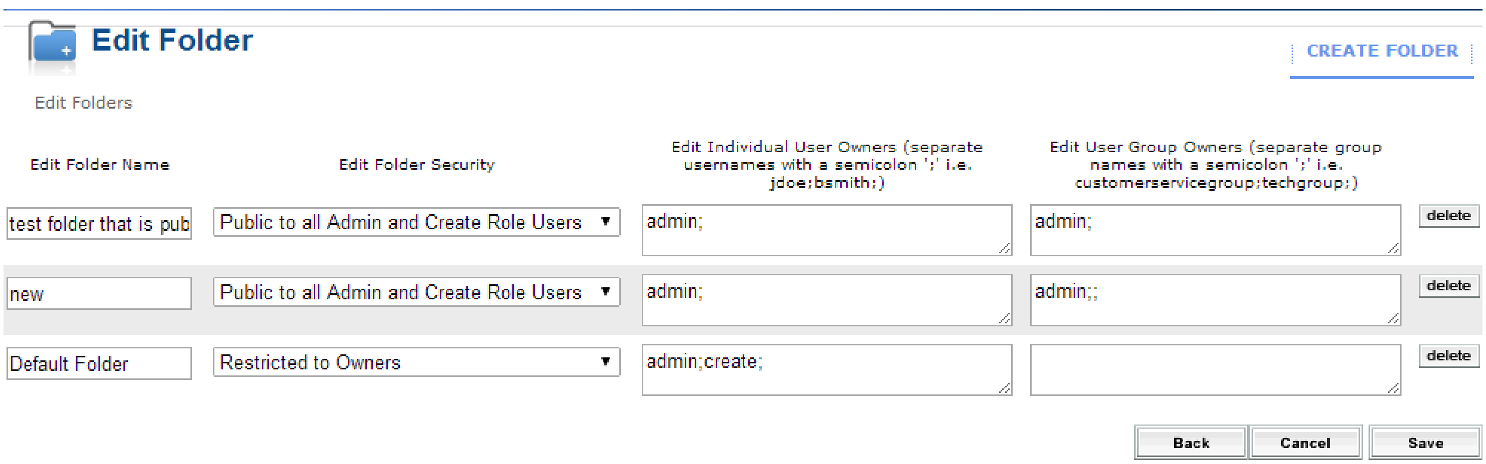


Click **Create New Folder**

1. Enter the **Folder Name**
2. Click **Save**

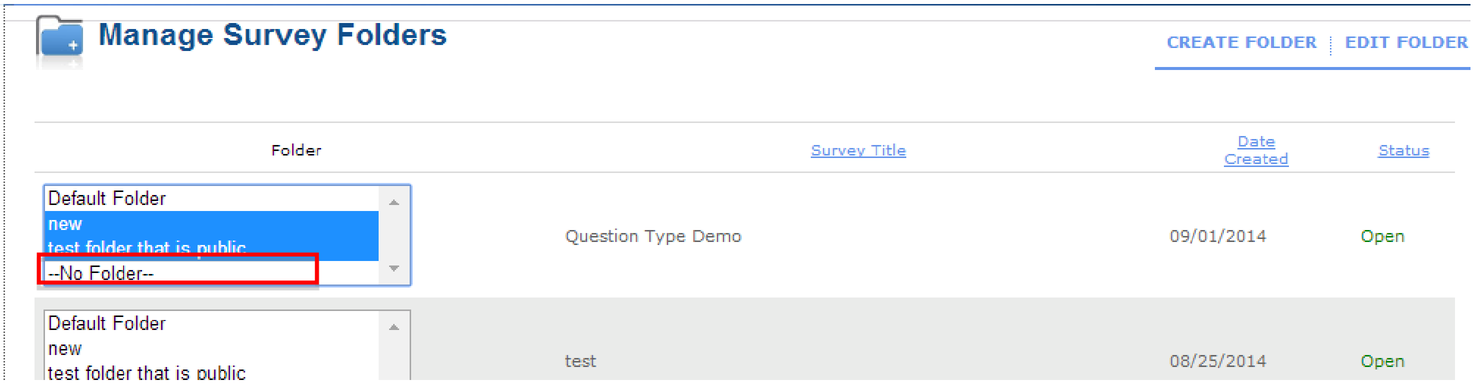


Click **Save** again.
Click “Edit Folder” to edit a folder:



To add surveys to your new folder:

- Click **Manage Folders**. You will see a list of your surveys.
- Click the dropdown arrow next to the survey and select the folder to store it in.


Manage Survey Folders
CREATE FOLDER
EDIT FOLDER
Folder
Survey Title
Date Created
Status
Default Folder
new
test folder that is public
--No Folder--
Question Type Demo
09/01/2014
Open
Default Folder
new
test folder that is public
test
08/25/2014
Open