



# Select Survey .NET

**v5**

Power User Training



## SelectSurvey.NET Power User Training

This course covers advanced features and should follow completion of the Basic Training for the SelectSurvey application.

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## Course Outline

- Advanced Survey Design:
  - Database Dropdown Question – Populated from Database
  - Database Dropdown Question – Populated from Web Service
  - Calculated Question Type
  - Adding HTML in question text
    - How to add images to question answer options
    - How to add tooltips to question text
  - Timed and Scored Survey Design
- Advanced Piping Tokens:
  - Pre-populating a survey with email list tokens
  - Pre-populating a survey with user tokens
- Deploying survey with Email List containing survey login/password
- Deploying a survey with 3<sup>rd</sup> party email deployment such as Constant Contact
- Hidden Fields
- Dynamic Tokens
- Advanced Reporting



- Application Wide Settings Options
- Admin Tools
- Kiosk Admin
- Obtaining Technical Support Resources

## Advanced Survey Design:

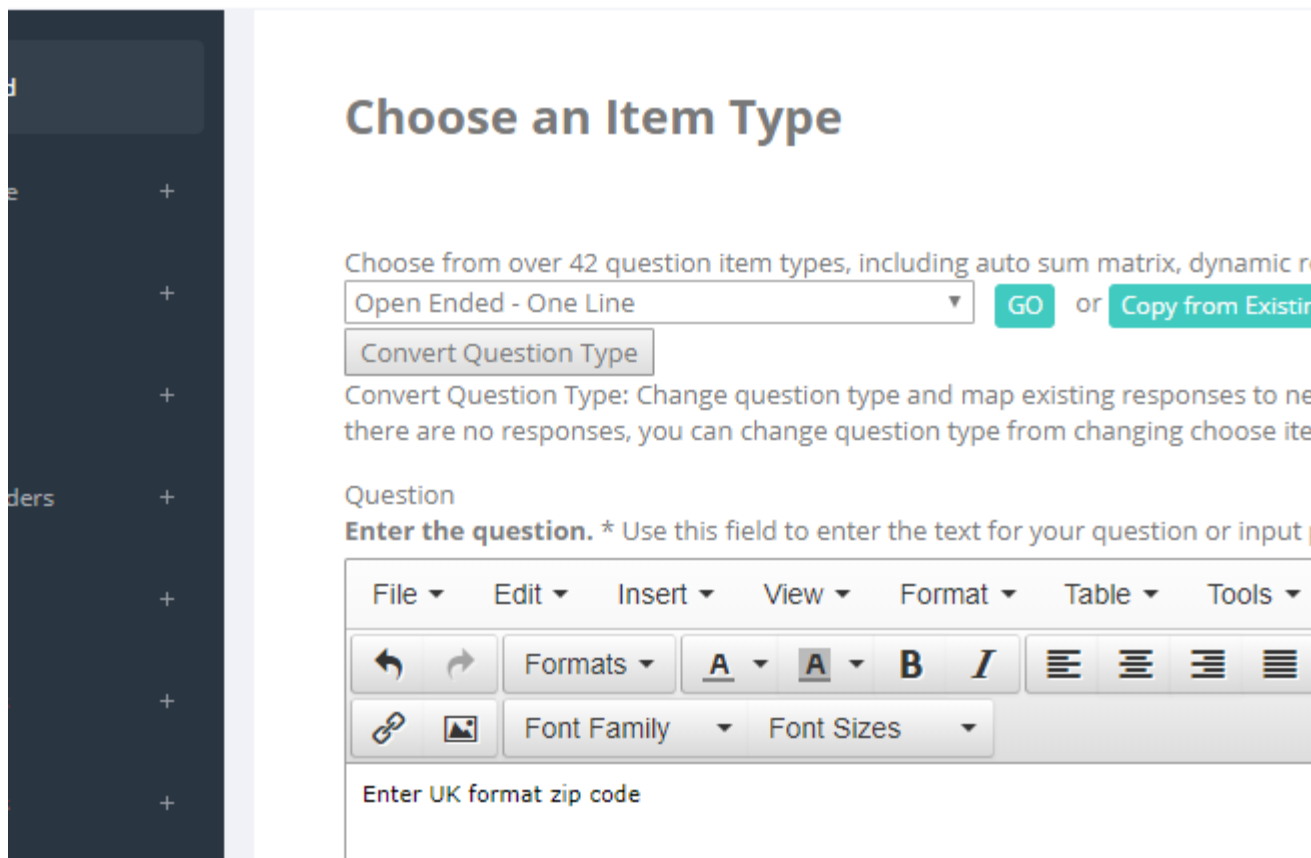
### *Primary Validation*

Using the open ended one line question type you can add custom validation such as regex to validation or match the inputted text to a specified format.

UK zip code validation:

1) Add an open ended one line question to the survey:

TSURVEY.NET V5.0



2) click "Advanced Validation"

Validation Options

**Required Validation**

Required=Question answer is required to conti

Not Required=Question answer not required to

Warning=Respondent will be warned that the c

Note: Matrix Option buttons validate that every

Not Required

**Advanced Validation**

Email Address. Check this box if the answ

Password Field. Check this box if the answ

3) Choose "CORE: Regular Expression Validation" then click "GO"

## Choose from Validation Library:

CORE: Regular Expression Validation

Go

4) Enter the regex per the example (use an online regex tester if you need to) Select the action from the drop down that you want to trigger the validation (when they click next in the survey (onsubmit), or when their mouse leaves the field (onblur), then click "ADD" to add the validation.

Enter the regular expression matching pattern using RegExp() constructor format.

Example 1: \d

Example 2: /d/ (see regex tester in left menu)

Example 3: ^[a-zA-Z0-9]+\$ (only letters and numbers)

`/^[a-zA-Z]{1,2}([0-9]{1,2} | [0-9][a-zA-Z])\s*[0-9][a-zA-Z]{2}$/`

Specify Alert Text:

Type in the text that you want to pop up when validation fails. Note: do not use apostrophes.

Please enter a valid UK Zip Code

Select Event which will trigger this Validation:

The event is what will kick off the javascript validation.

onBlur (The input focus was lost on item)

Add

5) Click "SAVE"

Item Validation Saved Successfully.



Example 3: `^[a-zA-Z0-9]+$` (only letters and numbers)

```
 /^[a-zA-Z]{1,2}([0-9]{1,2} | [0-9][a-zA-Z])\s*[0-9][a-zA-Z]{2}$/
```

Specify Alert Text:

Type in the text that you want to pop up when validation fails. Note: do not use apostrophes.

Please enter a valid UK Zip Code

Select Event which will trigger this Validation:

The event is what will kick off the javascript validation.

onBlur (The input focus was lost on item) Add

### Current Validations for this Item:

Top level item validation: (Note: alternatively, you can directly edit the javascript in this box and click save.)

Example (pasting this in the below box, then click save):

```
onblur="this.value = this.value.toUpperCase();"
```

The above will change all the text in the box to upper case after the input box loses focus.

```
onBlur="ValidateValueRegEx(document.forms[0].QID2395.value, /^[a-zA-Z]{1,2}([0-9]{1,2} | [0-9][a-zA-Z])\s*[0-9][a-zA-Z]{2}$/g, 'Please enter a valid UK Zip Code');"
```



Enter the regular expression matching pattern using RegExp() constructor format.

Example 1: \\d

Example 2: /\d/ (see regex tester in left menu)

Example 3: /^[a-zA-Z0-9]+\$ (only letters and numbers)

Specify Alert Text:

Type in the text that you want to pop up when validation fails. Note: do not use apostrophes.

Select Event which will trigger this Validation:

The event is what will kick off the javascript validation.

## Database Dropdown Question – Database Option

### Choice – Database Dropdown

The database dropdown question serves as a direct database query to a lookup table to fill a drop down box.

To add a database dropdown question you will need to format a T SQL Query that returns results that can populate the dropdown box.

The query needs to be formatted specifically with “ItemValue” and “ItemDisplay”.

The “ItemValue” is the value that gets stored in the database when the respondent chooses this answer, typically the ID or identifier of the display value. The “ItemDisplay” is the value that shows in the drop down box to the respondent.

You can use any token in the query as shown in the example, or no tokens at all.

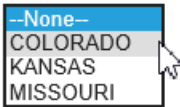
An example with a hidden field token is:

```
SELECT full_state AS ItemDisplay, state_abbr AS ItemValue FROM _state where full_state='###HD=LocationState###'
```

An example without a token is:

```
SELECT full_state AS ItemDisplay, state_abbr AS ItemValue FROM _state order by full_state
```

2. database dropdown question type.



	state_abbr	state_id	full_state
1	KS	1	KANSAS
2	MO	2	MISSOURI
3	CO	3	COLORADO

### Question

Enter the question. \* Use this field to enter the text for your question or input prompt.

Rich text editor toolbar with options: Bold, Italic, Underline, ABC, Bulleted List, Numbered List, Indent Left, Indent Right, Format, Font family, Font size. Icons for Undo, Redo, Copy, Paste, Link, Unlink, Image, Video, Audio, HTML, Table, Table of Contents, Tokens, and Refresh.

Select the survey:

**Enter Question Text here**

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

Text input field for question alias.

Enter the sub-text. Enter informational or additional text to display below the question.

Text input field for sub-text.

**Select Database Connection**

Show Database Filter Button

Check to show database filter button that will launch filter selection pop up to filter question item answers.

Select the database connection DSN: (add these in admin tools)

Dropdown menu showing "StudioDReader" and a link "Add Database DSN Connections".

Enter the SQL. \*The SQL must contain two columns aliased as ItemValue and ItemDisplay.

ItemDisplay will be the value shown in the dropdown, ItemValue will be the answer recorded in the database.  
\*ex: SELECT Country AS ItemDisplay, Country AS ItemValue FROM Countries

**Enter database query**

The SQL can contain a piping token, for example: WHERE (dbo.myTable.myID = ###442###)

In the above example the piping token "###442###" would be replaced with the item answer value of item 442 in your survey database.

Code editor showing SQL query: `select top 5 title as ItemDisplay, title as ItemValue from sur_survey`

## Database Dropdown Question – Web Service Option

### Choice – Database Dropdown

Below is an example of how to populate a “Database Dropdown” question type from a public or third party Soap 1.2 web service.

In order to populate a dropdown from web service you must first create a “Web Service Token” the same way you create a “Database Token”. Token creation pages can be accessed from “Admin Tools” or from the link “Manage Tokens” on the “Create/Edit Item” page in modify survey page.

Below is

## Tools and Utilities for Survey Administrators

### API and Web Service

[View Survey API Methods](#)

[View Survey Web Services](#)

API and Web Services for access and integration with 3rd party applications.

### General Configuration

[View General Configuration](#)

General configuration settings based on web.config file are displayed here for admin troubleshooting.

[Change Application Wide Settings](#)

Application wide settings that should only be modified by an administrative IT person. These settings will affect the entire application and cause serious malfunction of the application.

### Database and Web Service Utilities

[Database Tokens \(Nicknames\) used in Dynamic Tokens and Database Question Types](#)

Database tokens are nicknames stored in the database associated with various database connection strings used for dynamic token types. This feature allows admins to add connection strings, whereas the create user will only see the token nickname for the connection. The full connection information.

[Web Service/API Tokens used in Dynamic Tokens and Database Question Types](#)


Web Service tokens are nicknames stored in the database associated with third party web service ASMX URL, credentials and argument question types from a web service or API call to an external API.

Click the link "Web Service/API Tokens used in Dynamic Tokens and Database Question Types" as shown in the image above.



Click "Create Web Service Token" to create a new token.

Below is an example of a public Soap 1.2 web service that you can use to fill a "Country" drop down box with all of the available countries in it.

 **Web Service Token (Nickname) Assignment** WEB SERV

**Add Web Service/API Token (Nickname):**

**Web Service Token Nickname:** \*  
Token Nicknames must be unique. No special characters are allowed.  Example: country

**Web Service Name:** \*  
No special characters are allowed.  Example: country

**Web Service/API URL:** \*  
i.e. http://your.com/yourapi.asmx  Example: http://www.websvc.net/country.asmx

**Web Service/API Credentials Username:** \*  
Enter the username required to access the API.  Example: (leave blank)

**Web Service/API Credentials Password:** \*  
Enter the password required to access the API.  Example: (leave blank)

**Web Service/API Method:** \*  
Enter the method for this API ex: GetCountries() The arguments, if any, are specified on the edit item page.  Example: GetCountries

**Web Service/API Credentials Encryption Key:** \*  
Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.  Example: (leave blank)

With the settings above in the screenshot, you should be able to use this token to populate a Database Dropdown question.

On the edit item page access from the modify survey page, select the Country Token as the data source for this question. Select the radio button next to "External Web Service/API" and ignore everything under "External Database".

Your screen should look identical to the below:

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

Enter the sub-text. Enter information for the question.

Select the web service token in this box as the source from populating data.

**External Web Service/API** Select the 3rd party Web Service/API: (add these in admin tools)

country  [Add Web Service Tokens](#)

Enter Arguments (if any) for the Web Service/API call. Enter Arguments, if any, in the format required by the third party web service, ex: 123,456 or "Jane Doe","Acme"

The arguments can contain piping tokens, for example: ###442###,###443###

In the above example the piping token "###442###" would be replaced with the item answer value of item 442 in your survey before

**External Database** Select the database connection DSN: (add these in admin tools)

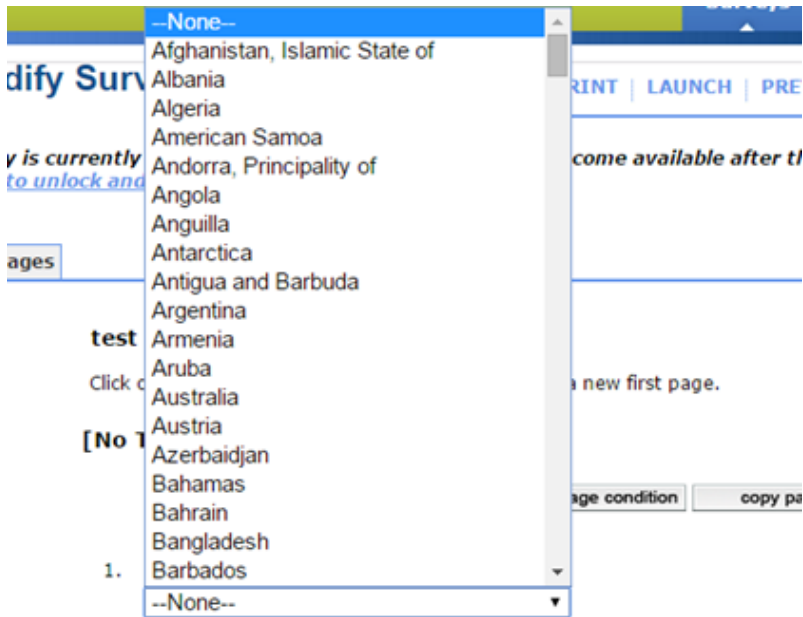
--Select Database DSN Connection (set up in admin tools)--  [Add Database DSN Connections](#)

Enter the SQL. \*The SQL must contain two columns aliased as ItemValue and ItemDisplay.

ItemDisplay will be the value shown in the dropdown, ItemValue will be the answer recorded in the database. In most cases this will be

\*ex: SFI FCT Country AS ItemDisplay. Country AS ItemValue FROM Countries

So the below dropdown question is now populating with countries:



Click on the "Insert" button to add an item here.

## Database Checkbox Question

Choice - Database Checkboxes

Entering your dynamic database query returns rows for checkbox list.

- Select the survey:
  - EVENT RECAP FINAL 6-9-2014
  - COPY of EVENT RECAP PROXIMO - old
  - Manage Suppliers and Products Start Page for Lezlie
  - Edit supplier logic - do not delete
  - Event RECAP copy - old version

## Database Options Question

Choice - Database Options

Entering your dynamic database query returns rows for radio buttons.



3. Select Survey:

- EVENT RECAP FINAL 6-9-2014
- COPY of EVENT RECAP PROXIMO - old
- Manage Suppliers and Products Start Page for Lezlie
- Edit supplier logic - do not delete
- Event RECAP copy - old version

## Matrix Database Query Capability

What if you want to prepopulate the matrix row text from prior answers or custom data or 3<sup>rd</sup> party database? You can! You can populate matrix row text the same way you can populate a "Database Dropdown" question type. You can type in a query that populates the matrix row text and only adds the exact number of matrix rows as returned by your custom query.

Applies To Only the Below Matrix Question Types:

- Matrix – Multiple Answers Per Row (Checkboxes)
- Matrix – Multiple Answers Per Row (Text/Dropdown)

### Choose an Item Type

Choose from over 35 question item types, including auto sum matr

Matrix - Multiple Answers per Row (Text/Dropdown ▼)  or

Then type in the query into the box per the example and screenshot below. Your query will be dependent on what data you are wanting to populate with. The example below populates the row text with the top 5 survey names in your survey table. Note that there are additional query examples if you click the "Help" link to view the in app help.

### Rows

Row names. \*Enter each row name on a separate line below. Example:

Row1

Row2

Row3

Advanced Option-

Format: left text|right text Alias can be specified after a semi-colon: left text|right text;alias;defaultcol1value|defaultcol2value

Advanced Option-

You can prepopulate a column answer for each row for that column.

Dynamic/Piping Tokens can be used in row and/or column text and/or default answers.

For example:

```
###DT=EMPLOYEES_1###;;###DT=EMPLOYEEENAME_1###|###DT=EMPLOYEEITITLE_1###
```

```
###DT=EMPLOYEES_2###;;###DT=EMPLOYEEENAME_2###|###DT=EMPLOYEEITITLE_2###
```

Advanced Option-

Custom Query for row names: Must start with "QUERY:" and return a variable named as "RESULTS" which contains the row names.

EXAMPLE: QUERY:select top 5 title AS RESULTS from sur\_survey

Click [HELP](#) link in left menu and click on pipe tokens for examples of how to populate from other question answers.

QUERY:select top 5 title AS RESULTS from sur\_survey

Enter your columns as you would normally.

### Columns

Column headings and types. \* Enter each of the column headings in the text boxes below and a next column. Separate values by semicolon ";".

For Icon Question Types Only:

Icon Class (the ex: fa fa-check fa-2x (choose any icons from <http://fontawesome.github.io/Font>

Icon Color Class (can be a different class for each column so each column can have separate h

Specify Colors in Survey Template CSS

1	<input type="text" value="Enter Your First Name"/>	Open Ended - One Line ▼	<input type="text"/>	A
2	<input type="text" value="Enter Your Last Name"/>	Open Ended - One Line ▼	<input type="text"/>	A
3	<input type="text" value="Select Your Location"/>	Choice - One Answer (Drc ▼	LocationA;Locati	A

When the survey is launched it will run the custom query in real time populating the matrix row text accordingly.

## matrix query example

Page 1 of 1

- This demonstrates dynamic query capability of the Matrix - Multiple Answer per Row (Text/Dropdown) question type. With this question type you can type in a query that populates the row text of the matrix. This query can be based on prior answers, or query a 3rd party database, or custom table in your database.

	Enter Your First Name	Enter Your Last Name	Select Your Location
decisionmaking in secondary prophylaxis of venous thromboembolism	<input type="text"/>	<input type="text"/>	-- Please Sel ▾
test	<input type="text"/>	<input type="text"/>	-- Please Sel ▾
date	<input type="text"/>	<input type="text"/>	-- Please Sel ▾
NPS monitor	<input type="text"/>	<input type="text"/>	-- Please Sel ▾
TestKamil	<input type="text"/>	<input type="text"/>	-- Please Sel ▾

Done

## Matrix Rating Scale Slider Question Type

Matrix - Rating Scale Slider (Numeric)

Html5 slider will show for all devices that support it, for older versions of IE browser, it will render a legacy html javascript slider.

- Random Order. Check this box if the answers to this question should be displayed in random order.
- Auto Check. Check this box if you would like the option to auto-check the same column is selected.

Beginning number. Enter the first number for the rating scale.  
 (Number Only)

Ending number. Enter the last number for the rating scale.  
 (Number Only)

Row heading width. Enter the width, in pixels, of the column for the row headings.

Text that goes on left and right of the slider is separated by the pipe "|" symbol (can be left blank for right hand side).

**Rows**

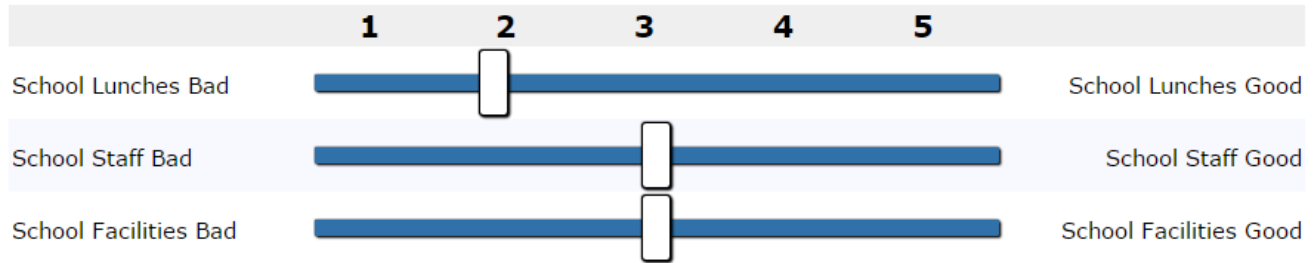
Row names.\* Enter each row name on a separate line below

School Lunches Bad|School Lunches Good  
 School Staff Bad|School Staff Good  
 School Facilities Bad|School Facilities Good

**Preview**

Save this code, which is required to update your response at a later time.

1. Rate the below from 1 to 5 (1 is bad and 5 is good)



*Choice – One Answer Per Row (Icons)*

For any of the "Icons" question types, you can specify font awesome icons instead of checkboxes or option buttons and you can set them to highlight on rollover with your survey stylesheet.

A reference for all of the icons that you can use is here: <http://fontawesome.github.io/Font-Awesome/icons/>

Random Order. Check this box if the answers to this question should be displayed in random order.

Answer Alignment \*Select the way answers should be aligned on the page.

Vertical (Horizontal) Answers Per Row: 5 (default 5)

### Answers

Select answer choices. Select a group of answers or a single answer.

Select answer group (optional)

Enter the answers. \*Enter each of the answers in the text boxes below.

For Icon Question Types Only:

Icon Class (the ex: fa fa-check fa-2x (choose any icons from <http://fontawesome.github.io/Font-Awesome/icons/>))

Icon Color Class (can be a different class for each column so each column can have separate hover colors, etc.)

Specify Colors in Survey Template CSS

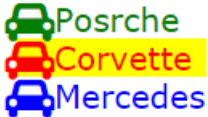
1	<input type="text" value="Porsche"/>	<input type="radio"/> Default	<input type="text"/>	points	Alias:	<input type="text"/>	Icon Class:	<input type="text" value="fa fa-car fa-lg"/>	Icon Color:	<input type="text" value="green"/>
2	<input type="text" value="Corvette"/>	<input type="radio"/> Default	<input type="text"/>	points	Alias:	<input type="text"/>	Icon Class:	<input type="text" value="fa fa-car fa-lg"/>	Icon Color:	<input type="text" value="red"/>
3	<input type="text" value="Mercedes"/>	<input type="radio"/> Default	<input type="text"/>	points	Alias:	<input type="text"/>	Icon Class:	<input type="text" value="fa fa-car fa-lg"/>	Icon Color:	<input type="text" value="blue"/>

Text that goes next to icon

Use icon-picker to select icon from list of available font-awesome icons.

color of icon (blank defaults to black)

3. Pick your favorite car



## Calculated Question Type

A Calculated Question type is a question that is calculated from another question, or from tokens, or from a combination of both.

For example, a question that calculates body mass index:

Weight divided by height times height \* 703.

`(###133###/(###145###*###145###))*703`

Click in the left blue panel "Token Reference" to see what the tokens are for the height and weight questions (or questions that you are using to calculate).

###12500### 1	1	Is this the state you are still located?
###12499### 1	2	database dropdown question type.
###12502### 2	3	Enter your weight in pounds
###12503### 2	4	Enter your height in inches
###12501### 3	5	The state you selected is: ###12499### The st ###12500###

Then use those values in your calculation:

Calculated Question Type Example

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

Enter the sub-text. Enter informational or additional text to display below the question.

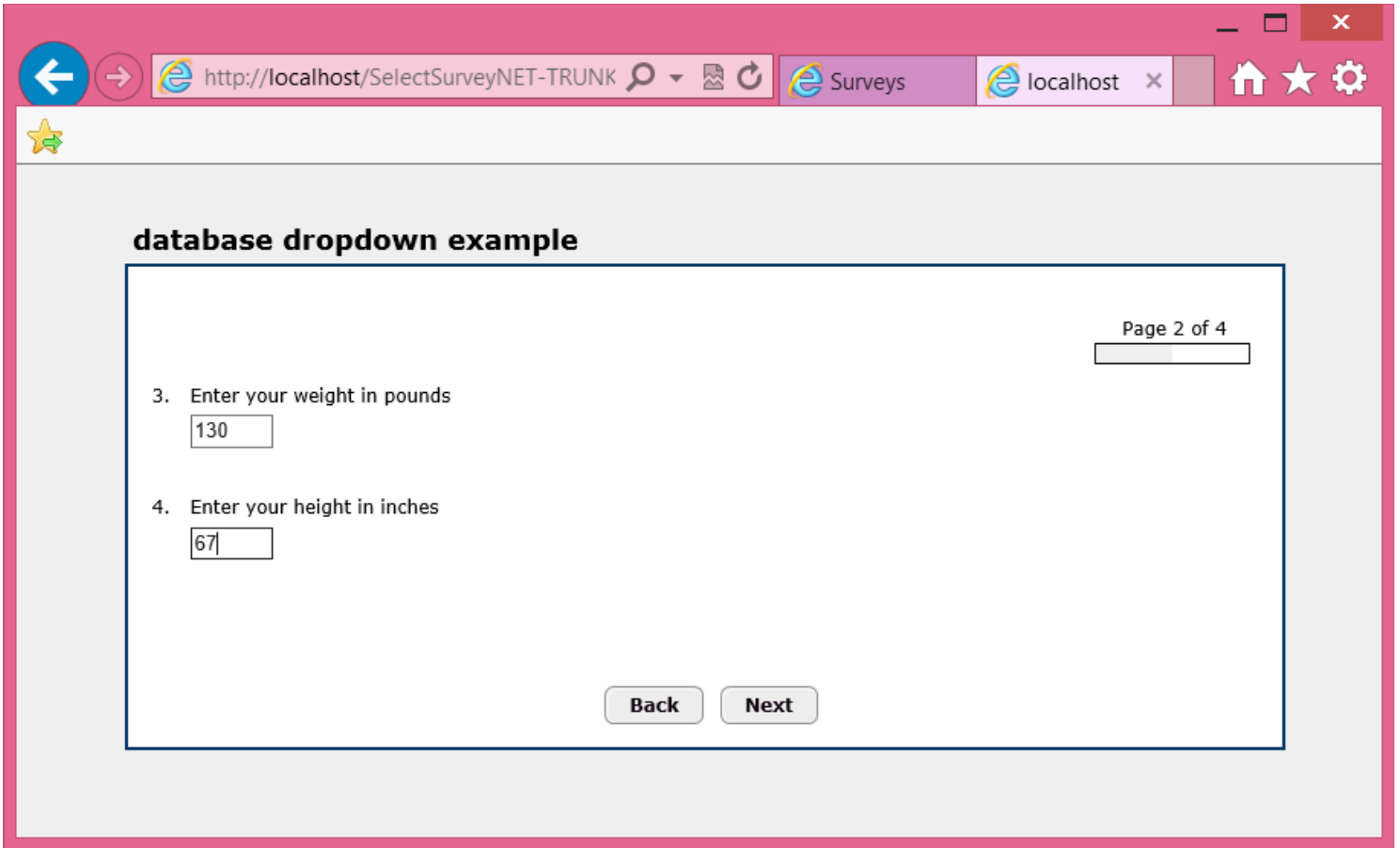
Options

Enable textbox. Check the box if you want the calculated answer textbox to be enabled. (If checked, respond

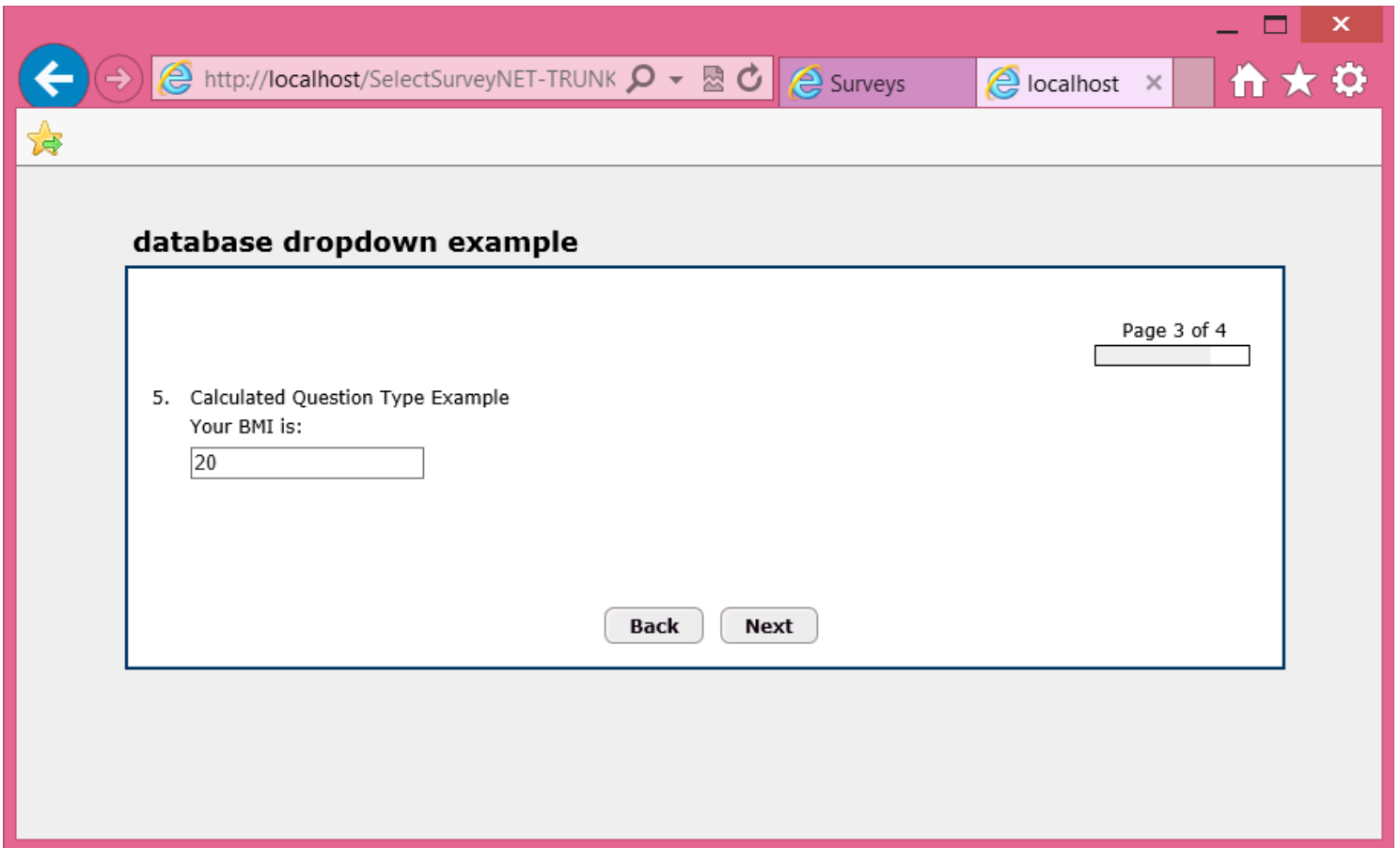
The calculated question type allows the survey to calculate values from previous numeric questions displaying the  
Enter the calculation using pipe tokens to represent the question item answer values.  
Example:(###133###/(###145###\*###146###))\*703  
Tokens must be questions that were on previously answered pages of the survey, otherwise the values will not be  
(###12502###/ (###12503###\*###12503###) ) \*703

Enable rounding decimal places. Ex: 0=1, 1=1.0, 2=1.00, 3=1.000, 4=1.0000

0 ▾



The calculation shows on the calculated question type from the prior question answers:



## Adding HTML in question text

### *How to add links to your question text*

You can add links which open new windows or open/download reference documents that you have uploaded via the upload file tool.



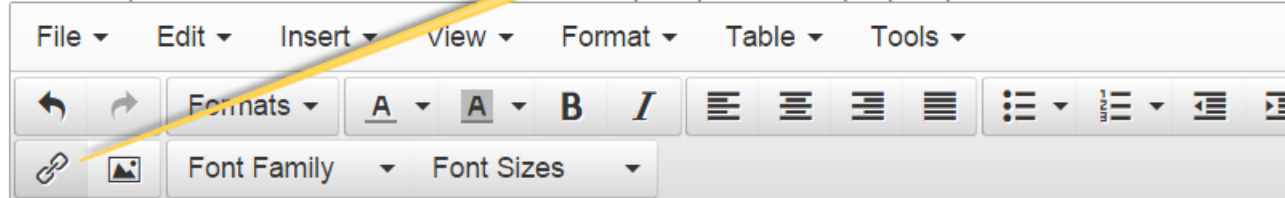
Convert Question Type: Change question type and map existing responses to new response answers. This option o responses, you can change question type from changing choose item type drop down box.

### [OPEN TEXT REPLACEMENT](#)

Click the "Insert/edit link" icon to insert a hyperlink into your

### Question

Enter the question. \* Use this field to enter the text for your question or input prompt.



Insert/edit link

method |

---

---

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

---

Enter the sub-text. Enter informational or additional text to display below the question.

---

---

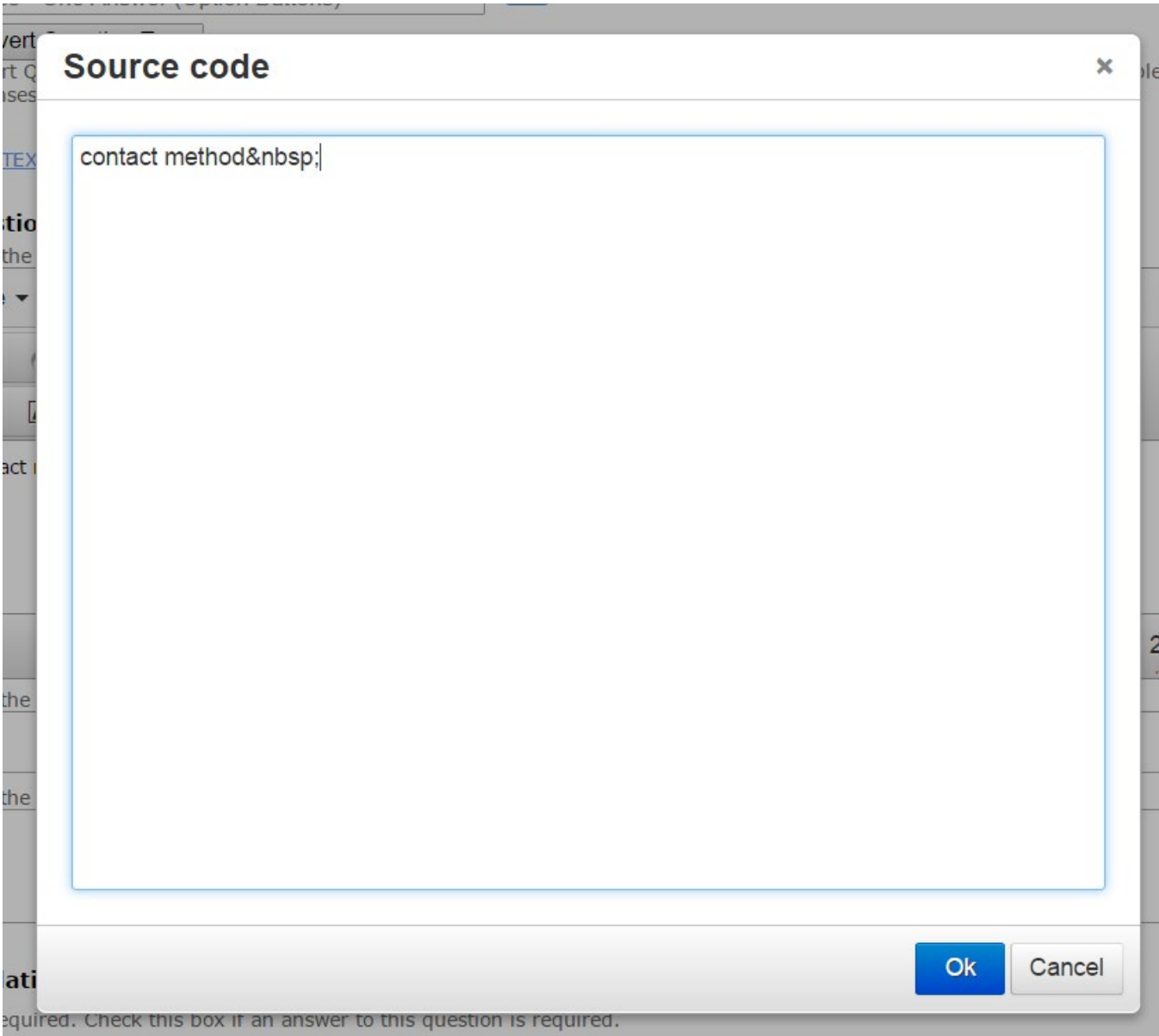
### Validation Options

#### *How to add html to your question text*

Click "Tools" > "Source Code" to view and edit the html source code.

Things you can do with this:

- Copy in video links from youtube or other sources to be viewed for answering a survey question.
- Adding paypal donate buttons/links
- Adding google maps code



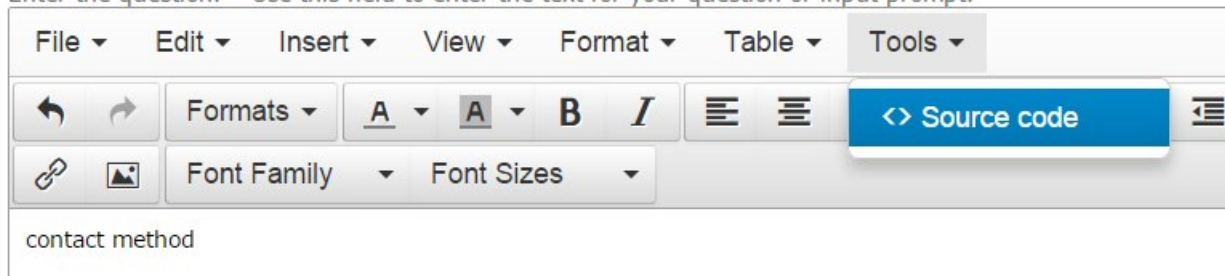
Source code

```
contact method |
```

Ok Cancel

### Question

Enter the question. \* Use this field to enter the text for your question or input prompt.



File Edit Insert View Format Table Tools

Undo Redo Formats A A B I List Bulleted List **<> Source code** Table

Link Image Font Family Font Sizes

contact method

## How to add images to question answer options

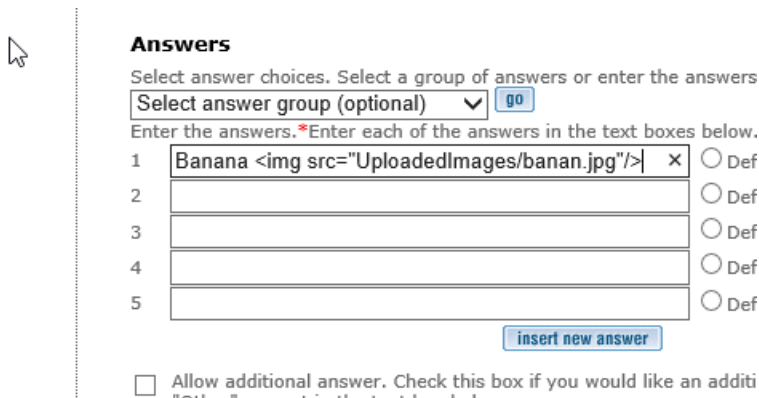
You can enter html into any question text or answer text boxes. For example if you want the text to be bold you can do:

```
<b>Your text</b>
```

If you want one word to be colored red you can do:

```
<span style="color:red">This is RED text</span> and this is not.
```

You can also include images in answer options by putting html image tags in the answer option text.

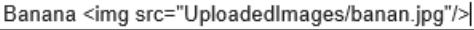


**Answers**

Select answer choices. Select a group of answers or enter the answers

Select answer group (optional)

Enter the answers. \*Enter each of the answers in the text boxes below.

1	Banana  <input type="button" value="x"/>	<input type="radio"/> Def
2		<input type="radio"/> Def
3		<input type="radio"/> Def
4		<input type="radio"/> Def
5		<input type="radio"/> Def

Allow additional answer. Check this box if you would like an additi

You can also add height and alignment to your html.

**database dropdown example**

6. Choice - One Answer (Option Buttons) Question Type

-  Banana
-  Blackberry
-  Strawberry
-  Kiwi

Answer Alignment \*Select the way answers should be aligned on the page  
 Vertical (Horizontal) Answers Per Row: [

**Answers**

Select answer choices. Select a group of answers or enter the answers below.

Select answer group (optional)

Enter the answers. \*Enter each of the answers in the text boxes below.

- 1   Default
- 3   Default
- 4

General	Display	Access	Completion	ActiveLogic	F
<b>Respondent Access Level</b> <a href="#">Response Level Help</a>					
<b>Authentication</b>	Anonymous				
<b>Responses</b>	Multiple Responses Not Updateable				
	Note: Resumable response types will resume to the page. Note: Login required survey links will redirect user to survey if they are not already logged in. Note: tools due to security.				
<b>IP Address Range:</b>	There are no IP address ranges configured for this "Configure" button to add IP address validation or				
<b>User Group Restrictions:</b>	There are no User Group restrictions configured for "Configure" button to add User Group validation or				
<b>AD User Group Restriction:</b>	There are no AD Group restrictions configured for "Configure" button to add AD User Group validation or Active Directory Authentication is not enabled				
<b>Max # Responses</b>	Enter the maximum number of responses for this responses. <input type="text"/>				
<b># responses per User</b>	Multiple Response surveys only, enter the maximum blank for unlimited responses. <input type="text"/>				
<b>Days for Update:</b>	Enter the number of days during which a respondent option applies to respondent access levels that are <input type="text"/>				
<b>Timed Survey</b>	<input type="radio"/> Not Timed <input checked="" type="radio"/> Timed <input type="text" value="15"/> x (minutes)				

On each page of the survey the top will show the time elapsed, total time, and time remaining.

When the time has been reached, the user is forwarded to the "Thank you for taking the survey" completion page.

**test**

Time Elapsed: 0 minutes  
 Time Remaining: 15 minutes  
 Total Time: 15 minutes

Page 1

1. [BalloonExample](#) tooltips example

## Scored Survey

You can add points to any question type that has a point field.

That includes most question types, all "choice" question types, and matrix question types.

### Answers

Select answer choices. Select a group of answers or enter the answers below.

Agree - Disagree

Enter the answers. \*Enter each of the answers in the text boxes below.

1	Strongly Agree	<input type="radio"/> Default	<input type="text" value="5"/>	points	Alias: <input type="text"/>
2	Agree	<input type="radio"/> Default	<input type="text" value="4"/>	points	Alias: <input type="text"/>
3	Neutral	<input type="radio"/> Default	<input type="text" value="3"/>	points	Alias: <input type="text"/>
4	Disagree	<input type="radio"/> Default	<input type="text" value="2"/>	points	Alias: <input type="text"/>
5	Strongly Disagree	<input type="radio"/> Default	<input type="text" value="1"/>	points	Alias: <input type="text"/>

Allow additional answer. Check this box if you would like an additional "Other" answer to allow survey takers to give a diff "Other" prompt in the text box below.

Other, please specify

The points are stored with the responses, and are calculated on the Results Overview Report, and other reports.

### 3. Example of points

	Response Total	Response Percent	Points	Avg
View responses to this question <input type="button" value="view"/>				
Strongly Agree (5 Points)	0	0%	0	0
Agree (4 Points)	1	100%	4	4
Neutral (3 Points)	0	0%	0	0
Disagree (2 Points)	0	0%	0	0
Strongly Disagree (1 Points)	0	0%	0	0
<b>Total Respondents (For this Question)</b>		<b>1</b>	<b>100%</b>	
<b>Total Responses</b>		<b>1</b>		
<b>Total Points Earned</b>		<b>4</b>		
<b>Point Average (TotalPoints/UniqueRespondentCount-SkippedTotal)</b>		<b>4</b>		
<b>Point Weighted Average (TotalPoints/ResponseCount)</b>		<b>4</b>		
		(skipped this question)	1	
View conditional responses (if applicable) <input type="button" value="view"/>				

You can display the points to the user using any of the points tokens available:

#### SCORE TOKENS:

TOKEN	SURVEY PAGE	ORDER	QUESTION TEXT
###SCORE###	SUM TOTAL FOR ALL PAGES		
###SC=12508###	1	3	Example of points
No tokens defined for selection.			
No tokens defined for selection.			
No tokens defined for selection.			

Presentation - Message  or

Convert Question Type: Change question type and map existing responses, you can change question type from changing choose ite

Spell Checker Help: If the box flashes and goes away, that means i  
Current Dictionary: English - International. 21 Dictionaries are instz

**Message**

Enter the message. \* Enter the text for the message.

You earned **###SC=12508###** points!

**test**

Time Elapsed: 0 minutes

Time Remaining: 15 minutes

Total Time: 15 minutes

You earned 4 points!

You can display a certificate of completion at the end of the survey by pasting in the certificate html/rich text into the survey options – completion message.

## Multiple Language Survey Design

### *Language selector survey*

To create a survey in multiple languages:

- 1) Create a survey with one page that contains a language selection drop down box (or any single select question type).
- 2) Create an ActiveLogic workflow with "Redirect" option for each language in the drop down. Each language would be a separate workflow with the "operator" of that question answer. Each workflow would have a "redirect" action which you would place in the survey deployment URL of the survey with that language. (see ActiveLogic guide for further instructions on how to use ActiveLogic workflows)

- 3) Create the English version of the survey. Make sure it is finished and exactly how you want it, for the exports to all match up, it is important not to add or remove questions after making the other language copies.
- 4) Create the other language surveys by clicking "Create survey" > "From Existing" then select the original English version of the survey. Copy as many times as needed, naming the survey with the language you want it to be.
- 5) Edit the other language surveys by going to "Survey Options" > "General" and selecting the language from the drop down box. Click "Translate" button to automatically translate all text in the survey to the other language.
- 6) If you need to customize any automatically translated text, check the survey text. To check the validation message translation, go to "admin tools" > "globalization/translations" for the languages that you are using. This text will show after you set the language on the survey and is used for any "rendered" text.
- 7) Exporting the data: Export each survey and check the checkbox next to "Response ID" and "Survey ID" so that you can combine the responses of all surveys into one spreadsheet. Make sure the export settings are the same for every export so all of the columns will line up.
- 8) Make sure the start and end date of all surveys are correct and the same.

## Advanced Piping Tokens:

### *Pre-populating a survey with email list tokens*

When deploying a survey to an email list through SelectSurvey.NET you have access to all of the email list data for each recipient. Each piece of data has a token that you can put as the default value or populate the survey with. Each recipient email link has a unique URL that identifies that recipient, so you can prepopulate any of the data related to that email list.

**EMAIL LIST TOKENS:** (from email list data stored in database)

TOKEN	EMAIL LIST ATTRIBUTE
###ED=EMAIL_ADDRESS###	Email Address
###ED=FIRST_NAME###	First Name
###ED=LAST_NAME###	Last Name
###ED=CUSTOM_DATA_1###	Custom Data 1
###ED=CUSTOM_DATA_2###	Custom Data 2
###ED=CUSTOM_DATA_3###	Custom Data 3

**HIDDEN DATA TOKENS:**



Example of email list token prepopulation

Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.

Enter the sub-text. Enter informational or additional text to display below the question.

### Validation Options

Required. Check this box if an answer to this question is required.

#### Advanced Validation

Email Address. Check this box if the answer must be a valid email address.

Password Field. Check this box if the answer should be masked with asterisks like a password.

Default Value. The value entered below will be displayed as the default answer value for this question.

Maximum Length. Enter the maximum number of allowable characters for this answer.

## *Pre-populating a survey with user tokens*

When deploying a survey with the access type "Login Required" on the survey options page, you have access to all of the user data for each recipient. Each piece of data has a token that you can put as the default value or populate the survey with. When the user logs in to take the survey the recipient is identified and that user data can prepopulate the survey.

**USER TOKENS:** (User data stored in database with user login, accessible from manage user pages in admin.)

TOKEN	USER ATTRIBUTE
###UD=FIRST_NAME###	First Name
###UD=LAST_NAME###	Last Name
###UD=EMAIL_ADDRESS###	Email Address
###UD=USERNAME###	Username
###UD=REGISTER_DATE###	Register Date
###UD=USER_PASSWORD###	User Password
###UD=PASSWORD_HINT###	Password Hint
###UD=CURRENT_POSITION###	Current Position
###UD=COMPANY###	Company
###UD=LOCATION###	Location
###UD=CUSTOM_DATA_1###	Custom Data 1
###UD=CUSTOM_DATA_2###	Custom Data 2
###UD=CUSTOM_DATA_3###	Custom Data 3
###UD=CUSTOM_DATA_4###	Custom Data 4
###UD=CUSTOM_DATA_5###	Custom Data 5
###UD=CUSTOM_DATA_6###	Custom Data 6
###UD=CUSTOM_DATA_7###	Custom Data 7
###UD=CUSTOM_DATA_8###	Custom Data 8
###UD=CUSTOM_DATA_9###	Custom Data 9
###UD=CUSTOM_DATA_10###	Custom Data 10
###UD=USER_TITLE###	User Title
###UD=COMPANY_HEAD###	Company Head
###UD=DEPARTMENT###	Department
###UD=ADDRESS_1###	Address 1
###UD=ADDRESS_2###	Address 2
###UD=ZIP_CODE###	Zip Code
###UD=CITY###	City
###UD=STATE###	State
###UD=COUNTRY###	Country
###UD=BUSINESS_PHONE_1###	Business Phone 1
###UD=BUSINESS_PHONE_2###	Business Phone 2
###UD=BUSINESS_FAX###	Business Fax
###UD=MOBILE_PHONE###	Mobile Phone
###UD=ACTIVE_UNTIL###	Active Until Date

## Template Design

We provide a default template called "Responsive Template" that automatically scales to the device you are using to take the survey. In addition you can copy, edit or create as many look and feel survey templates as you like. You can use the built in template edit menus, or paste in your own custom style sheet like the below example:



**test**

Time Elapsed: 0 minutes

Time Remaining: 15 minutes

Total Time: 15 minutes

Page 1 of 2

1. [BalloonExample](#) tooltips example
  
2. Is the sky blue?
  
3. Example of points
  - Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree

Stylesheet for the above template:

```

<style type="text/css">
/*
 * Survey Stylesheet
 */
/* CUSTOM CLASSES
----- */

#head-top {
    background: #373737;
    height: 40px;
    padding-left: 3000px;
    margin-left: -3000px;

```



```
padding-right: 3000px;
margin-right: -3000px;
position: absolute;
top: 0;
border-bottom: solid 4px #f5f2ed;
}
#head-main {
position: absolute;
top: 0;
left: 0;
display: table;
width: 760px;
height: 119px;
}
#head-main {
display: table-cell;
vertical-align: bottom;
margin-right: 0;
}
#head-main img {
border-style: none;
vertical-align: top;
float: left;
margin-left: 15px;
}
#head-main h1 {
color: #c34500;
font-family: 'EksjaExtremesRegular';
-webkit-font-smoothing: antialiased;
```





```
font-size: 20px;

font-weight: bold;

margin-left: 125px;

margin-right: 30px;

margin-top: 90px;

text-align: right;

}

#head-main .ir-top {

    position: absolute;

    height: 119px;

    width: 100%;

    float: left;

    z-index: -1;

    padding-bottom: 10px;

    background-color: rgba(245, 242, 237, .5);

    border: solid 1px #fff;

    /* Rounded Corners */

    -moz-border-radius: 15px;

    border-radius: 15px;

    /* Box Shadow */

    -moz-box-shadow: 1px 1px 10px 5px #444;

    -webkit-box-shadow: 1px 1px 10px 5px #444;

    box-shadow: 1px 1px 10px 5px #444;

}

#footer {

    padding-top: 20px;

    background: #373737;

    height: 30px;

    border-top: solid 4px #f5f2ed;
```





```
padding-left: 3000px;
margin-left: -3000px;
padding-right: 3000px;
margin-right: -3000px;
position: fixed;
bottom: 0;
}
#footer span {
color: #f5f2ed;
font-size: 13px;
width: 760px;
display: block;
text-align: center;
}
#push {
padding: 80px;
}
/* STANDARD CLASSES
----- */
.SurveyName /*style of survey name/title that is outside of outline border*/{
font-family:'EksjaExtremesRegular';
-webkit-font-smoothing: antialiased;
font-size: 28px;
font-weight: bold;
position: relative;
top: 193px;
left: 80px;
z-index:100;
}
```



```
.SurveyBodyStyle /*style on survey body tag*/{  
    margin: 0;  
    overflow-x: hidden;  
    font-family: 'Gudea', sans-serif;  
    -webkit-font-smoothing: antialiased;  
    background:url(/uploads/images/mushroom.jpg) fixed;  
}  
  
.SurveyAlignmentStyle /*outer alignment table style*/{  
    position: relative;  
    margin-top: 0;  
    border-spacing: 0;  
}  
  
.SurveyAlignmentRowStyle /*first row in outer alignment table*/{  
  
.SurveyLogoBlockStyle /*outer table that contains logo*/{  
  
.SurveyBorder,  
table[style$="#ffffff"] /*border width and style of box that goes around survey page*/{  
    position: relative;  
    top: 130px;  
    border: solid 1px #fff;  
    padding:10px;  
    margin-bottom: 80px;  
    height: 100%;  
    background-color: rgba(245, 242, 237, .5);  
    overflow-x: hidden;  
    /* Rounded Corners */  
    -moz-border-radius: 15px;  
    border-radius: 15px;  
    /* Box Shadow */  
    -moz-box-shadow: 1px 1px 10px 5px #444;
```

```

    -webkit-box-shadow: 1px 1px 10px 5px #444;

    box-shadow: 1px 1px 10px 5px #444;
}

table[style$="#ffffff"] {background:url(/uploads/images/mushroom.jpg);}

.SurveyColor /*color of background box of survey within the survey border*/{

    background: #f3d08e;

    overflow: hidden;

    -moz-border-radius: 15px;

    border-radius: 15px;
}

}

table[style$="#f5f2ed"] {

    overflow: hidden;

    border: solid #f5f2ed 1px;

    -moz-border-radius: 15px;

    -webkit-border-radius: 15px;

    border-radius: 15px;
}

}

table[style$="#f5f2ed"] span, table[style$="#f5f2ed"] p {

    font-family: 'Gudea', sans-serif;

    -webkit-font-smoothing: antialiased;

    font-size: 140%;
}

}

.SurveyOuterProgressBarTable /*table that contains progress bar*/{background: #f3d08e;}

.SurveyTimerTable /*table that contains survey timer feature*/{}

.SurveyProgressBarTextTable /*contains height and style of progress bar table*/{}

.PageNumberFontStyle /*the style of the text of page numbers in progress bar and elsewhere*/{}

.SurveyProgressBarTable {}

.ProgressFirstColor /*the color of the first progress bar color*/{background: #c34500;}

.ProgressSecondColor /*the color of the second progress bar color*/{background: #f5f2ed;}

```



```
.SurveyMatrixHeadingRowText {}

.SurveyPageTitleTable /*the style of text in page title text*/{display: none;}

.SurveyPageIntroTable /*the style of table width/size for page introduction text*/{
    position: absolute;
    top: 20px;
    left: -10px;
}

.SurveyPageIntroduction /*the style of text in page introduction text*/{display: block; text-align: left;}

.QuestionHolderTable /*height and width of table that contains the questions for the survey*/{
    background: #f5f2ed;
    width: 103%;
    margin-left: -10px;
    padding-top: 15px;
}

.QuestionHolderTable tbody {width: 100%;}

/*input[type="radio"] {position: relative; margin-top: 50px; margin-bottom: 20px;}*/

.Normal {
    /*position: absolute;
    left: 20px;
    z-index: 50;
    width: 400px;*/
}

.Required {}

.H1HeadingStyle {}

.PageNumberFontStyle {}

.InlineHelpSpanStyle {}

.SurveyPageTitle /*the survey page title that is inside the outline border*/{display: none;}

.SurveyNavigationLink A {}

.ConstantSum {}
```

```
.DatabaseDropdownTable {}  
.MatrixMultiselectCheckboxes {}  
.MatrixMultiselectCheckboxes th[id]{background: #a7c4c9;}  
.MatrixMultiselectCheckboxes th[width]{background: #a7c4c9;}  
.MatrixMultiselectCheckboxes th[bgcolor="#f5f2ed"]{background: #a7c4c9;}  
.MatrixMultiselectCheckboxes td[bgcolor="#f5f2ed"]{background: #a7c4c9;}  
.MatrixRatingScale {}  
.MatrixSingleSelectOptions {}  
.MatrixSingleSelectOptions th[id]{background: #a7c4c9;}  
.MatrixSingleSelectOptions th[width]{background: #a7c4c9;}  
.MatrixSingleSelectOptions td[bgcolor="#f5f2ed"]{background: #a7c4c9;}  
.MatrixSingleSelectOptions th[id="Not sure"]{background: #a7c4c9; width: 20%;}  
.MatrixSingleSelectOptions td[axis="Not sure"]{background: #f5f2ed;}  
.MatrixSingleSelectOptions td[align="right"]{background: #f5f2ed;}  
.MatrixTextboxes {}  
.MatrixTextDropdown {}  
.MultiSelectCheckboxesTable {}  
.OpenEndedNumberTable {}  
.OpenEndedCommentsBoxTable {}  
.OpenEndedDateTable {}  
.OpenEndedNumberTable {}  
.OpenEndedOneLineTable {}  
.OpenEndedOneOrMoreLinesTable {}  
.PresentationHeadingTable {}  
.PresentationHorizontalRuleTable {}  
.RankingTable {}  
.SingleSelectDropdownTable {}  
.SingleSelectOptionButtonsTable {}  
.TrueFalse {}
```

```
.YesNo {}

.tabNavigationDiv /*style used for the optional page tab navigation on top of surveys*/{}

.TouchNumberSliderTable {}

/* BUTTON STYLE
----- */

.button {

    background:-webkit-gradient( linear, left top, left bottom, color-stop(0.05, #db723d), color-stop(1, #c34400) );

    background:-moz-linear-gradient( center top, #db723d 5%, #c34400 100% );

    filter:progid:DXImageTransform.Microsoft.gradient(startColorstr='#db723d', endColorstr='#c34400');

    background-color:#db723d;

    -moz-border-radius:6px;

    -webkit-border-radius:6px;

    border-radius:6px;

    border:1px solid #373737;

    display:inline-block;

    color:#ffffff;

    font-family: 'Gudea', sans-serif;

    -webkit-font-smoothing: antialiased;

    font-size:15px;

    font-weight:bold;

    padding:6px 6px;

    text-decoration:none;

    text-shadow:1px 1px 0px #878787;

}.button:hover {

    background:-webkit-gradient( linear, left top, left bottom, color-stop(0.05, #c34400), color-stop(1, #db723d) );

    background:-moz-linear-gradient( center top, #c34400 5%, #db723d 100% );

    filter:progid:DXImageTransform.Microsoft.gradient(startColorstr='#c34400', endColorstr='#db723d');

    background-color:#c34400;

}.button:active {
```

```
        position:relative;

        top:1px;

    }

/* EKSJA FONT
----- */

@font-face{font-family:'EksjaExtremesRegular';

src:url(http://oregonstate.edu/osuhomepage/css/fonts/Eksja/Eksja-regular-webfont.eot);

src:local('?'),url(http://oregonstate.edu/osuhomepage/css/fonts/Eksja/Eksja-regular-webfont.woff)
format('woff'),url(http://oregonstate.edu/osuhomepage/css/fonts/Eksja/Eksja-regular-webfont.ttf)
format('truetype'),url(http://oregonstate.edu/osuhomepage/css/fonts/Eksja/Eksja-regular-webfont.svg#webfont) format('svg');font-
weight:normal;font-style:normal;

}

/* SURVEY-SPECIFIC FIELDS
----- */

/* Education Abroad */

th[id="I would like to learn this language"] {width: 30%;}

th[id="I have studied this language before"] {width: 30%;}

.icon-idea {

    display: block; height: 51px; padding-top: 35px; padding-left: 60px;

    background: url(/uploads/images/idea/globe.png) no-repeat left top;

}

/* Exit Survey */

.icon-exit {

    display: block; height: 51px; padding-top: 35px; padding-left: 60px;

    background: url(/uploads/images/exit/cap.png) no-repeat left top;

}

#Answer3371 element.style {height: 20px;}

</style>
```

"Save" Navigation	Save	choose	or	Save
"Close" Navigation	Close This Win	choose	or	Close
"View Reports"	View Reports	choose	or	View Reports
"Enter Next Response"	Enter Next Re	choose	or	Enter Next Response
"Print Response"	Print Respons	choose	or	Print Response
"Continue"	Continue	choose	or	Continue
"Logoff"	Logoff	choose	or	Logoff

### Stylesheet Link or Stylesheet Text

**Use Styled Buttons** Check this box if you want to use your stylesheet for input button styles (i.e. standard input buttons will be used with the "Link Text" as the button text). To use custom button images, do not check this box.

**Override Styles** **WARNING!** Override styles from selections above (over-rides alignment, border, progress bar, fonts, colors and ALL selections above). If this is not checked, both selections above and stylesheet will be referenced in the page. You will have to specify styles for the border and progress bar, etc if you want those to show up after clicking this checkbox to over-ride them. Reference the styles in the style reference below to correctly set them.

### Custom Stylesheet

Paste or type in your stylesheet link or inline stylesheet into the box below which will go in the page header.

```
padding-left: 3000px;
margin-left: -3000px;
padding-right: 3000px;
margin-right: -3000px;
position: absolute;
top: 0;
border-bottom: solid 4px #f5f2ed;
}

#head-main {
    position: absolute;
    top: 0;
    left: 0;
    display: table;
    width: 760px;
    height: 119px;
}

#head-main {
    display: table-cell;
    vertical-align: bottom;
```

**Style Class Reference:** Below are the class references that are present in survey question items, and surveys automatically. You can create your own style in the box above for any of the below:

**Template Name:\***

**Active:\***  Yes  No **Public Use:\***  Yes  No

**Owners:**  
Enter the usernames for all owners of this survey. Separate each name with a semi-colon, and make sure that your username is in the list.

**Logo Path :**  
Enter the path for the logo to display at the top of the surveys. If left blank, no logo will be displayed.

**Logo Alignment:**  Right  Left  Center **Survey Alignment:**  Right  Left  Center

**Borders and Colors**

**Matrix Header Color:**

**Matrix First Color:**

**Matrix Second Color:**

**Progress First Color:**

**Progress Second Color:**

**Survey Background Color :\***

**Page Background Color:\***

**Display Border:\***  Yes  No

**Border Width:**

**Border Color:**

**Font Styles**

	Font Color	Font Size	Font Weight*	Font Family*
Survey Name	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="18"/>	<input type="checkbox"/> Bold <input type="checkbox"/> Normal	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Page Title	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="14"/>	<input type="checkbox"/> Bold <input type="checkbox"/> Normal	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Page Number	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="12"/>	<input type="checkbox"/> Normal <input type="checkbox"/> Bold	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Question Text	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="12"/>	<input type="checkbox"/> Normal <input type="checkbox"/> Bold	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Question Sub-Text	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="10"/>	<input type="checkbox"/> Normal <input type="checkbox"/> Bold	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Navigation Links	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="14"/>	<input type="checkbox"/> Normal <input type="checkbox"/> Bold	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Matrix Header	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="12"/>	<input type="checkbox"/> Bold <input type="checkbox"/> Normal	<input type="text" value="Verdana"/> <input type="button" value="choose"/>
Page Introduction	<input type="text" value="#000000"/> <input type="checkbox"/> <input type="button" value="Color Picker"/>	<input type="text" value="12"/>	<input type="checkbox"/> Bold <input type="checkbox"/> Normal	<input type="text" value="Verdana"/> <input type="button" value="choose"/>

**id Footer**

## Deploying survey

### Short URL Rerouting

For a shortened URL there is a built in URL rewriter on the deploy survey page:

So a URL such as <http://yoururl.com/ClientName> would automatically be rerouted to your longer URL <http://yoururl.com/TakeSurvey.aspx?SurveyID=HHHHHH> so that it would look cleaner and shorter.

#### URL REWRITER

Create a clean short URL.

Example:

<http://yoururl.com/ClientName>

instead of:

<http://yoururl.com/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:

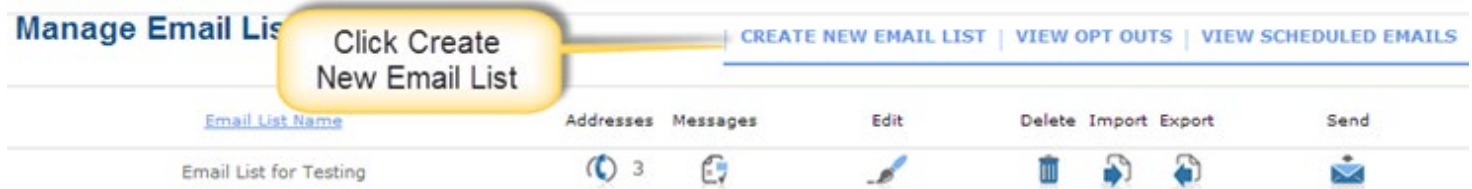
<http://yoururl.com/ClientName>

<http://yoururl.com/>

Add URL Route

### Email List

For regular email list deployment, click "Email Lists" and create a new email list.



Manage Email Lists

Click Create New Email List

CREATE NEW EMAIL LIST | VIEW OPT OUTS | VIEW SCHEDULED EMAILS

Email List Name	Addresses	Messages	Edit	Delete	Import	Export	Send
Email List for Testing	3						

Enter an email list name, then click "Save"

## Create Email List

### New Email List Options

Email List Name\*

From Scratch -- Create a new Email List from scratch

From Existing Email List -- Copy an existing Email List

Email List:

Copy all email addresses

Copy email addresses that match

Active:

Email Address:

Custom Data1:

Custom Data2:

Custom Data3:

From Registered Users -- Create an email address list from registered users

Copy all registered users

Copy registered users that match:

Active:

Email Address:

Position:

Company:

Location:

Custom Data 1:

Custom Data 2:

Custom Data 3:

Owners:

On the following page you have the option of importing from a file or copy/paste into the comments box provided in the format specified. After this step you can continue to add or remove email addresses from this list from the manage email list page at any time.



## Import Email Addresses

**Import Users From:** Comma Separated List ▼

### Import Format:

The import format for text pasting and file import can be changed from this list. Check or uncheck a field to include or exclude it. Required fields can not be unchecked, and they must contain values in the import data for the user import to succeed.

- Email Address
- Email First Name
- Email Last Name
- Email Custom Data 1
- Email Custom Data 2
- Email Custom Data 3
- Email Active

### Import Data:

Import users by pasting user information on each line. The acceptable format is determined by the Import Format control above.

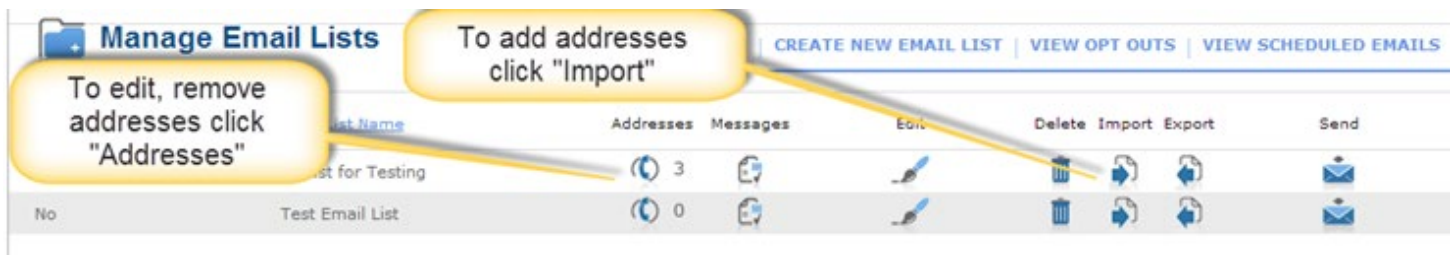
Separate each field by a comma, do not include commas in the actual data, and make sure that each entry is on its own line. If any intermediate, non-required fields, you must insert a comma as a placeholder. The examples below, which demonstrate correct removed when actually submitting Users.

Note: older database versions have 75 character limit on first name and last name fields. You can lengthen those in the database get latest database upgrade script to lengthen.

```
joe@Mycompany.com, Joe
fred@yourcompany.com
alice@hercompany.com,, Johnson
sam@hiscompany.com, Sam, Johnson, President
eric@ourcompany.com,,, CEO, $250K, 3 years
```

To add, edit or remove addresses click the icons in the manage email list page.

You can also export the email list to excel by clicking the "Export" icon.



The screenshot shows the 'Manage Email Lists' page with a table of email lists. Callouts point to specific icons: 'To edit, remove addresses click "Addresses"' points to the 'Addresses' icon, 'To add addresses click "Import"' points to the 'Import' icon, and 'To edit, remove addresses click "Addresses"' also points to the 'Addresses' icon. The table has columns for List Name, Addresses, Messages, Edit, Delete, Import, Export, and Send.

List Name	Addresses	Messages	Edit	Delete	Import	Export	Send
Test Email List	3		[Edit]	[Delete]	[Import]	[Export]	[Send]
No	0		[Edit]	[Delete]	[Import]	[Export]	[Send]

To view sent messages, click "Messages" icon in the manage email list page.

**Email Messages**

**Email Messages for 'Email List for Testing' Email List**  
\* Follow-Up Response Counts show on the original email message.

Sent Date	Survey Name	Email Subject	Response Count	Sent Count	Send Follow-Up	Details
5/27/2014	EVENT RECAP FINAL 6-9-2014	Event Recap 5-28-2014	0	3		
8/25/2014	EVENT RECAP FINAL 6-9-2014	(Follow Up Email)		3		
8/25/2014	EVENT RECAP FINAL 6-9-2014	(Follow Up Email)				
8/25/2014	EVENT RECAP FINAL 6-9-2014	(Follow Up Email) test				

*Note: Callouts in the image indicate: 'Click to send follow up' pointing to the 'Send Follow-Up' icon, and 'Click "Details" icon to view message details' pointing to the 'Details' icon.*

Below is an example of the message details page:

**Email Message Details**

---

**Message Details**

<b>Message Subject:</b>	Event Recap 5-28-2014	<b>Date Sent:</b>	5/27/2014 10:07 PM
<b>Email List:</b>	Email List for Testing	<b>Survey:</b>	EVENT RECAP FINAL 6-9-2014
<b>Message Text:</b>	Dear #FirstName#,  We are conducting a survey, and would appreciate your response. The link to the survey is: #SurveyLink#  Thanks in advance for responding to the survey, Scott		

**CC Emails:**  
**BCC Emails:**

<b>From Email:</b>	tech@classapps.com	<b>HTML:</b>	Yes
<b>Response Count:</b>	0	<b>Sent Count:</b>	3

**Emails Sent** Displaying 1 - 3 of 3

Filter by response type:

EmailAddress	First Name	Last Name	Response Date	Status	Response	Sent Date
<a href="mailto:briggs.sheryl@gmail.com">briggs.sheryl@gmail.com</a>	Sheryl	Briggs		No Response		5/27/2014 10:07 PM
<a href="mailto:sales@classapps.com">sales@classapps.com</a>	com	Sales		No Response		5/27/2014 10:07 PM
<a href="mailto:tech@classapps.com">tech@classapps.com</a>	Tech			No Response		5/27/2014 10:07 PM

25 sent emails per page

If you are using ResponseLogic, you can view scheduled emails to be sent at a future date and cancel scheduled emails.

Scheduled Date	Subject	Condition	Message Type	View Body	Delete
----------------	---------	-----------	--------------	-----------	--------

To schedule a message, simply select a send date in the future as shown below.

### Send Email Message

**Step 2 of 2 -- Message Details**

All fields marked with a red asterisk (\*) are required. You can personalize your email by including tokens in the fields described below. When finished, click the Send button to send the email to the designated recipients.

**Email List:** The email list selected on the last page. Click back to change the email list.  
**Email List for Testing**  
**This List was Last Sent on: 5/27/2014 10:07:11 PM With Email Subject: Event Recap 5-28-2014**

**Survey:\*** Select the survey to which the email will be sent.  
-- Please Select --

**Pre-Populate Message From Prior Email** optional  
Select email message from below list:  
-- Please Select --

Warning: You must remove or update any tokens that were survey specific. Tokens from a different survey will not work.

**Pre-Populate Message From Email Template**  
Select email template from below list:  
-- No Available Templates --

**Send Date:** Enter the date and time that you want the survey emails to be sent on.  
09/01/2014  Now

**Email Subject:\*** \_\_\_\_\_

**'From' Name:** Enter the NAME that you want to show that the email is being sent from.  
\_\_\_\_\_

**'From' Address:\*** Enter the EMAIL address that the email should appear to come from.  
\_\_\_\_\_

**Email Text:\***  
Enter the text of your email below. You may include the following tokens, each of which will be replaced, as noted, in the actual email:  
#SurveyLink# - The location of the link to the survey (required) (this is formatted with an anchor tag around it)  
#SurveyLinkInformatted# - No anchor tag around the link, so you can put it in an image or tag with your own click link text

If sent prior, time and date are shown to prevent sending twice

If future date is selected, this email will show in scheduled email list where it can be cancelled.

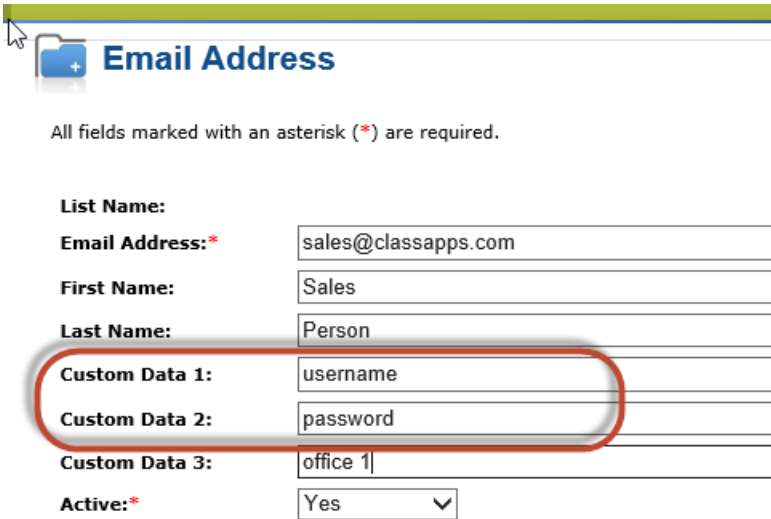
optional

Enter the date and time that you want the survey emails to be sent on.  
09/01/2014  Now

## Email List containing survey login/password

You can populate any of the email address custom fields with the survey username and login you pre-assign to the user and populate that in the survey deployment email.

You can pre-assign those in excel in bulk and import them along with the email addresses all at one time.



All fields marked with an asterisk (\*) are required.

<b>List Name:</b>	
<b>Email Address:*</b>	sales@classapps.com
<b>First Name:</b>	Sales
<b>Last Name:</b>	Person
<b>Custom Data 1:</b>	username
<b>Custom Data 2:</b>	password
<b>Custom Data 3:</b>	office 1
<b>Active:*</b>	Yes <input type="checkbox"/>

**Email Text:\***

Enter the text of your email below. You may include the following tokens, each of which

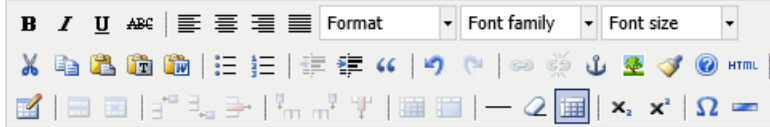
- #SurveyLink# - The location of the link to the survey (required) (this is formatted with #SurveyLinkUnformatted# - No anchor tags around the link, so you can put it in an image)
- #EIDToken# - Just the EID with nothing around it. Usage Example: yoururl/TakeSurvey starting marker.
- #QSEnd# - Survey Link query string add on values ending marker.

Example: #SurveyLink# #QSStart#&product=apple&office=#CustomData1#&country: The above example will automatically attached the extra query string values on to the

- #DeclineLink# - The location of the link a user can click to decline responding to the survey
- #DeclineLinkUnformatted# - No anchor tags around the link so you can put it in an image)
- #FirstName# - The first name of the email recipient
- #LastName# - The last name of the recipient
- #CustomData1# - The first custom data field
- #CustomData2# - The second custom data field
- #CustomData3# - The third custom data field
- #OptOutLink# - A link for the user to opt-out of further emails (this is just the link put "receive emails"...)

**HTML EMAIL VERSION:**

All emails have an html view and a plain text view (called alternate views), the recipient



We are conducting a survey, and would appreciate your response.

The link to the survey is:

#SurveyLink#

Login with Username:

#CustomData1#

Password:

#CustomData2#

If you do not wish to respond to this survey, please click on the link below to

### 3<sup>rd</sup> party email deployment such as Constant Contact

Generic Link: (no individual email list tracking)

If you are using a 3<sup>rd</sup> party email system, simply copy the survey deploy link from the deploy page and put that link in the email message in the 3<sup>rd</sup> party system.

Manage	Status	Title (click to preview)	Date Created	Design	Options	Deploy	Analyze	Total	Comp/ Incomp.	Archive	Delete	Clear
<a href="#">CLOSE</a>	Open	Test Survey	02/09/2018					0	0 / 0			
<a href="#">LAUNCH</a>	Design	Smileys	02/07/2018					0	0 / 0			
<a href="#">CLOSE</a>	Open	test for star question type	10/12/2017					1	0 / 1			

## Deploy Survey

### Deploy 'test' Survey

#### Send Survey Invitations by Email

To Send Invitations via the SelectSurvey E mail List Utility Select the Use E mail List button below. Email lists allow you to send a dynamic link to the Survey that offers you the ability to use Data Piping to insert any of the e mail list data into the survey. If instead you need to deploy a static link via web page, pop up, or want to use your desktop e mail program use the link below based on purpose.

Email Lists

[Did my survey ID change?](#)

#### Specify Custom Survey ID

Only letters and numbers are allowed. NO spaces, punctuation, or XML or HTML characters are allowed which could potentially break the survey link.

Save Custom SurveyID

#### Email Link

To send a link to your survey via email, simply copy the link below and paste it into your email.

<http://localhost/SelectSurveyNET-TRUNK/src/TakeSurvey.aspx?SurveyID=94L1976>

#### Web Page, Pop-up, or Email Links

Web Page Link

Unique Individual Link: (with email list tracking)

Alternatively if you want to use unique URLs for each recipient on the email list page choose "Export to Excel" option, then import that list into your 3<sup>rd</sup> party email program.

## Send Email Message

### Step 1 of 2 -- Email Recipients

Specify the email recipients by selecting an email list. You may optionally filter the email addresses in the selected email list using the filter o

#### Select Email List

Select the email list to which the email message should be sent.

Email List for Testing (3 email addresses)

#### Apply Filter

- Send to all email addresses.
- Send to all email addresses that have not opted out.
- 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.
- Send to email addresses that match:

Active:

Email Address:

Custom Data 1:

Custom Data 2:

Custom Data 3:

Select option to write EID unique URL's to Excel to import into 3rd party email system to maintain tracking between both systems.

Ca

## Email Message Formatting

When changing the default email message that appears in the box, make note of the below tokens which are updated when the email sends with their associated values from the email list.

The Default message looks like this:

Dear #FirstName#,

We are conducting a survey, and would appreciate your response.

The link to the survey is:

#SurveyLink#

If you do not wish to respond to this survey, please click on the link below to decline:

#DeclineLink#

Thanks in advance for responding to the survey,

Scott

Below are the tokens specific to email messages and opt outs:

#SurveyLink# - The location of the link to the survey (required) (this is formatted with an anchor tag around it)

#SurveyLinkUnformatted# - No anchor tags around the link, so you can put it in an image or tag with your own click link text.

#EIDToken# - Just the EID with nothing around it. Usage Example: yoururl/TakeSurvey.aspx?EID=#EIDToken# #QSStart# - Survey Link query string add on values starting marker.



#QSEnd# - Survey Link query string add on values ending marker.

Example: #SurveyLink##QSStart#&product=apple&office=#CustomData1#&country=US#QSEnd#

The above example will automatically attached the extra query string values on to the end of the #SurveyLink# URL anchor tag.

#DeclineLink# - The location of the link a user can click to decline responding to the survey

#DeclineLinkUnformatted# - No anchor tags around the link so you can put it in an image.

#FirstName# - The first name of the email recipient

#LastName# - The last name of the recipient

#CustomData1# - The first custom data field

#CustomData2# - The second custom data field

#CustomData3# - The third custom data field

#OptOutLink# - A link for the user to opt-out of further emails (this is just the link put your own text around it such as "click

#OptOutLink# if you no longer wish to receive emails"...)



# Hidden Fields

**Survey Options**  
 Survey Options  
 'Test Survey' Survey  
 Please make changes in the form below. Note that all fields marked with an asterisk(\*) are required.

General    Display    Access    Completion    ActiveLogic    Report    Advanced


**Hidden Fields**  
 There are no hidden fields configured for this survey. Click the "Configure" button to add fields or to learn more about hidden field to a survey that does not have any responses.

**Configured Dynamic Tokens**  
 There are no Dynamic Tokens configured for this survey. Click the "Configure" button to add dynamic token or to learn more.

**Survey Review**  
 The survey review feature allows review and edit of a response within a single survey page (instead of having to page through each response).

## Hidden Fields Survey

When a user responds to a survey, you may save data stored in session, cookies, or in the querystring, and have this data be associated with each individual response. The Type field is the source of the hidden data, the Key field is the key within the session, cookie, or querystring used to extract the data, and the Display Name field is how the data captured will be displayed in the reports.

#	Delete	Type	Key	Display Name
1		Querystring <input type="button" value="v"/>	<input type="text" value="test"/>	<input type="text" value="test"/> <input type="button" value="x"/>

To populate the response with the hidden field in the above case, you must add it to the query string deploy URL like so:

<http://localhost/SelectSurveyNET-TRUNK/src/TakeSurvey.aspx?SurveyID=94L1976&test=123>

Adding the "&test=123" will store "test" variable to equal "123" for the person that clicks this link.

## Dynamic Tokens

You can use dynamic tokens to insert custom data, delete custom data, retrieve custom data, retrieve single values, rows, or data sets, even XML or chart data directly from the database to display in a survey, email or custom report.

To add a dynamic token to a survey, click "Survey Options" then the "Advanced" tab:

### Survey Options

Survey Options  
"Test Survey" Survey  
Please make changes in the form below. Note that all fields marked with an asterisk(\*)are required.

General
Display
Access
Completion
ActiveLogic
Report
Advanced

Hidden Fields	<p>There are no hidden fields configured for this survey. Click the "Configure" button to add fields or to learn more about hidden field to a survey that does not have any responses.</p> <div style="text-align: center; margin-top: 10px;"> <span style="background-color: #76b82a; color: white; padding: 5px 15px; border-radius: 3px;">Configure Hidden Fields</span> </div>
Configured Dynamic Tokens	<p>There are no Dynamic Tokens configured for this survey. Click the "Configure" button to add dynamic token or to learn more.</p> <div style="text-align: center; margin-top: 10px;"> <span style="background-color: #76b82a; color: white; padding: 5px 15px; border-radius: 3px; border: 2px solid red;">Configure Dynamic Tokens</span> </div>
Survey Review	<p>The survey review feature allows review and edit of a response within a single survey page (instead of having to page through each</p> <div style="text-align: center; margin-top: 10px;"> <span style="background-color: #76b82a; color: white; padding: 5px 15px; border-radius: 3px;">Configure Survey Review</span> </div>

**TOTALYARDS**

**REPORT2**

page5

page11

page13

page15

page17

page19

page21

page23

###DT=TOTALYARDS\_1###

###DT=REPORT2\_1###

###DT=page5\_1###

###DT=page11\_1###

###DT=page13\_1###

###DT=page15\_1###

###DT=page17\_1###

###DT=page19\_1###

###DT=page21\_1###

###DT=page23\_1###

## Insert Dynamic token

### Create/Edit Dynamic Token

Enter the database connection string for the database that will be queried: (must be same database type as what the application already uses)

Server=ATOMIC7\SQLEXPRESS;Database=hawcpa2;UID=sa;PWD=ddh0sr;

Select Database Type: \* This can be separate database from your survey database, by specifying the connection parameters below.

SQLServer

Select Database Driver: \* Example: MS Access uses the OleDb driver. MS SQL can use SqlClient or OleDb driver.

SqlClient

**Select Query Dataset:** Place the piping token (i.e. ###123###) into the SQL query where token will be replaced with the answer that was provided by respondent to this question when taking the survey.

**NOTE: MUST USE "AS RESULTS" in the query for the dynamic token to get results.**

**Example: select title AS results from sur\_survey where survey\_id = ###100###**

**Insert With Query:** Example: insert into x (number\_col, text\_col) output INSERTED.number\_col AS results values (###100###, '###101###')

```
Select CAST(answer_text AS VARCHAR(MAX)) as [Company Name], ra.response_id as
[Response ID], '$'+convert(varchar(50),cast(round((isnull(ti.totalInvoiced,0)*.05-
(isnull(ts.totalSubtractions,0)*.05),2) as numeric(36,2)), -1) as [Stewardship
Assessment Due Care], isnull(ti.totalInvoiced,0) - (isnull(ts.totalSubtractions,0) as
[Sq. Yards]
from sur_response_answer ra
left outer join
(select sum(CAST((cast(answer_text as nvarchar(max))) as float)) as totalInvoiced,
response_id
from sur_response_answer where item_id in
```

Enter a name for this token which will identify it in the configure dynamic tokens page. Underscores are disallowed and will be removed.

###DT=REPORT\_1###

Each variable returned in order identified by ###DT=mytokenname\_1### through

###DT=mytokenname\_2###. The number of results returned by the query determine the numbers used by "\_1, \_2, \_3, ..."

Use these dynamic tokens in your question text or answers to "pipe" this data into your survey.

Cancel

Save

## DYNAMIC TOKEN PIPING QUERY EXAMPLES:

###DT=DynamicTokenID click the "configure dynamic tokens" button on the survey options page to add dynamic tokens, then type in or use the menu to place the token where ever you want the text replacement to occur. You can use dynamic tokens in insert custom data, delete custom data, retrieve custom data, retrieve single values, rows, or data sets, even XML or chart data directly from the database.

### Dynamic Token Query Example 1:

select title AS results from sur\_survey where survey\_id = ###100###

Just place the dynamic token in the survey by pasting the token that is generated in the application i.e.

###DT=yourtokenname### into the location in the survey, such as in the question text, subtext, or question itself. You can also place dynamic tokens in custom reports and emails and they will get replaced out with the resulting data when rendered. If the token returns no results and just updates, inserts or deletes data, then it will not display in the survey at all but will process when the question is rendered.

### Dynamic Token Query Example 2: (update data with a dynamic token in a survey)

IF EXISTS (SELECT \* FROM Acustom\_report2 where ResponseID = #ResponseID# and SurveyID = #SURVEYID# and ProductNum = 3) UPDATE Acustom\_report2 set ResponseID = #ResponseID#, SurveyID = #SURVEYID#, ResponseDate = GETDATE(), ProductNum = 3,[Product Sold] = '###445###', [Fiber Type] = '###446###', Backing = '###447###'

```
,[Square Yards Sold] =###449### ,[Square Yards Returned] =###450### ,[Exempt Assessment Adj] =###451###
,[Write off Assessment NC] =###452### ,[Write off Assessment Bankrupt] =###448### output " as results where
ResponseID = #ResponseID# and SurveyID = #SURVEYID# and ProductNum = 3 ELSE insert into Acustom_report2
(ResponseID, SurveyID, ResponseDate, [Product Sold],[Fiber Type],Backing,[Square Yards Sold],[Square Yards
Returned],[Exempt Assessment Adj],[Write off Assessment NC], [Write off Assessment Bankrupt],ProductNum) output "
as results values (#ResponseID#, #SURVEYID#, GETDATE(), isnull('###445###', 'none
selected'), isnull('###446###', 'none selected'), isnull('###447###', 'none
selected'), isnull(###449###, 0), isnull(###450###, 0), isnull(###451###, 0), isnull(###452###, 0), isnull(###448##
#, 0), 3)
```

**Dynamic Token Query Example 3:** (delete data with a dynamic token in a survey)  
delete from Acustom\_report2 output " as results where ResponseID NOT IN (select response\_id from sur\_response)

**Dynamic Token Query Example 4:** (generate a chart with a dynamic token in a custom report)

```
select [Product Sold], [Fiber Type], [Backing], SUM([Square Yards Sold]) AS [Square Yards Sold],
'$'+convert(varchar(50),cast(round(SUM([Square Yards Sold]*.05),2) as numeric(36,2)),-1) AS [Stewardship
Assessment Invoiced], SUM([Square Yards Returned]) AS [Square Yards Returned],
'$'+convert(varchar(50),cast(round(SUM([Square Yards Returned]*.05),2) as numeric(36,2)),-1) AS [Stewardship
Assessment Returned], SUM([Exempt Assessment Adj]) AS [Exempt Assessment Adjustment - Square Yards],
'$'+convert(varchar(50),cast(round(SUM([Exempt Assessment Adj]*.05),2) as numeric(36,2)),-1) AS [Exempt
Assessment Adjustment Amount], SUM([Write Off Assessment NC]) AS [Write Off Assessment Non Compliance - Square
Yards], '$'+convert(varchar(50),cast(round(SUM([Write Off Assessment NC]*.05),2) as numeric(36,2)),-1) AS [Write off
Assessment Non Compliance Amount], SUM([Write off Assessment Bankrupt]) AS [Write off Assessment Bankrupt -
Square Yards], '$'+convert(varchar(50),cast(round(SUM([Write off Assessment Bankrupt]*.05),2) as numeric(36,2)),-1)
AS [Write off Assessment Bankrupt Amount], SUM([Square Yards Sold])-(SUM([Square Yards Returned]) +
SUM([Exempt Assessment Adj]) + SUM([Write Off Assessment NC]) + SUM([Write off Assessment Bankrupt])) AS [Net
Sq Yds], '$'+convert(varchar(50),cast(round(SUM([Square Yards Sold]*.05) - (SUM([Square Yards Returned]) +
SUM([Exempt Assessment Adj]) + SUM([Write Off Assessment NC]) + SUM([Write off Assessment Bankrupt]))*.05,2) as
numeric(36,2)),-1) AS [Stewardship Assessment Due Care] from Acustom_report2 where SurveyID=134 group by
[Product Sold], [Fiber Type],[Backing]
```

**Dynamic Token Query Example 5:** (generate a chart for custom report)

```
Select round(sum(CAST((cast(answer_text as nvarchar(max))) as float))- (Select sum(CAST((cast(answer_text as
nvarchar(max))) as float)) from sur_response_answer where item_id in
(625,626,627,623,616,617,618,614,607,608,609,605,598,599,600,596,589,590,591,587,580,581,582,578,
571,572,573,569,562,563,564,560,553,554,555,551,544,545,546,542,535,536,537,533,526,527,528,524,517,518,519,
515,508,509,510,504)),2) as [Total Sq. Yards] from sur_response_answer where item_id in
(633,624,615,606,597,588,579,570,561,552,543,534,525,516,505)
```

## Advanced Reporting

The dynamic token above was used in a free form report:

Company Name	Response ID	Stewardship Assessment Due Care	Sq. Yards
Alexandria International, Inc.	2471	\$2814.74	56294.73
Alliance Textiles	2489	\$1568.08	31361.6
Atlas Carpet Mills, Inc.	2467	\$3689.15	73783
Beaulieu Group LLC	2485	\$89762.10	1795242.02
BELLBRIDGE, INC	2484	\$95.49	1909.72
Bloomsburg Carpet Industries, Inc.	2465	\$441.70	8834.02
Brintons U.S.Axminster, Inc.	2463	\$1151.06	23021.25
CAP Carpet, Inc.	2472	\$8.88	177.66
Catalina Home	2458	\$680.37	13607.31
CAVALIER CARPET INDUSTRIES	2438	\$2403.42	48068.36
Colin Campbell & Sons Ltd./Nature's Carpet	2462	\$26.38	527.65
COURISTAN, INC.	2482	\$1006.34	20126.87
COURISTAN, INC.	2483	\$94.17	1883.36
Crossley Axminster Inc.	2474	\$54.48	1089.5
Dalton Carpet Mart	2490	\$542.03	10840.51
DALTONIAN FLOORNG INC	2448	\$260.78	5215.66
Design Manufacturing International, LLC	2445	\$50.30	1005.97
Desso USA, Inc.	2469	\$27.21	544.18
DOBBS MILLS LLC	2486	\$34230.11	684602.11
Earth Weave Carpet Mills	2466	\$68.19	1363.89
Emerald Carpets	2481	\$3389.06	67781.29
Engineered Floors I I C	2456	\$34894.73	697894.59

## Manage Free-Form Reports

This page allows you to manage free-form reports.

Below you can add, edit or delete free-form Reports.

Viewing Requires a "Report Share" login. When the user clicks the email link they must login to view the report.

To add a login for someone to view a report set their permissions role to "Report Share" only. To add a user, click "Users" then "Add" then make sure you select the "Report Share" role from the drop down box. The email address for the report share recipient must match their login email address, since both must match in order to view the report.

Access Types: "L" = Login Required (Report share login role or higher), "A" = Anonymous

[CREATE FREE-FORM REPORT](#)

Free-Form Report Name	Date Created	Report Share URL	View	PDF	Edit	Delete	Enabled	Report Sharing	Send	Access Type

### Edit Free-Form Report

Select from the below questions to include in the report.

[Manage Filters](#)

Below you can design your own free-form report with the html editor using the tokens provided which will generate 360 style reports. This is a report of cumulative responses for calculating totals per question. This report is for individual response display.

**Access Type:**

Select the access level required to view the report. All report shares utilize unique URL link. Set report share

Anonymous

**Page Name:**

(this will show as the page title on the custom completion page)

Care Report 1 - 9/25/2013

**Custom Page Template:**

(you can select a survey template to maintain look and feel of survey)

Report Template

Use the below HTML editor to design your custom report. You can preview the page by clicking the preview button which will be replaced with the respondents specified attributes when the respondent views it.

**How to perform math functions on score token replacements:**

Example:[FUNC\_START](###SC=133###/(###SC=145###\*###SC=146###))\*703[FUNC\_END]

How to get priority colors based on scores: getPriorityColor(###SC=133###) will return green. getPriorityColor(###SC=145###) will return yellow. getPriorityColor(###SC=146###) will return red.

- 0-50 RED (High Priority)
- 51-75 YELLOW (Medium Priority)
- 76-100 GREEN (Low Priority)

**Instructions:**

Click the "T" button in the lower right row of the rich text menu below to show the tokens menu. Click on a



## Free Form Auto-PDF Population mapping into Acro Fields

Individual responses can be exported into PDF's where each answer is mapped to a PDF acro field. Just upload your PDF using the upload utility provided, then use the mapping menu to map each survey question to the PDF Acro field. When the responses come in, each response will have a PDF link, clicking the PDF link will populate the PDF with that response.

First click "Create Free Form Report",

## Manage Free-Form Reports

This page allows you to manage free-form reports.

Below you can add, edit or delete free-form Reports.

Viewing Requires a "Report Share" login. When the user clicks the email link they must login to view the report.

To add a login for someone to view a report set their permissions role to "Report Share" only. To add a user, click "Users" then "Add" then make sure you select the "Report Share" role from the drop down box. The email address for the report share recipient must match their login email address, since both must match in order to view the report.

Access Types: "L" = Login Required (Report share login role or higher), "A" = Anonymous

CREATE FREE-FORM REPORT

Free-Form Report Name	Date Created	Report Share URL	View	PDF	Edit	Delete	Enabled	Report Sharing	Send	Access Type
-----------------------	--------------	------------------	------	-----	------	--------	---------	----------------	------	-------------

Select or upload the pre-existing PDF into SelectSurvey.NET using the upload button, or select from prior uploaded PDF's in the drop down box.

## Report Configurator

### Free-Form Report Configurator

#### Step 1 - Select Survey

Select survey to include in report.

test (08/10/2014) ▼

#### Save Free-Form Report Name:

Saved reports will show on free-form reports page.

Auto Fill PDF

Upload or select PDF

#### Select Auto Fill PDF (optional):

This will allow you to populate PDF autofill fields with mapped survey response answers.

StudioDEventRecap-6-9-2014.pdf ▼ [Upload PDF](#)



## Free-Form Reports

MANAGE FREE-FORM REPORTS

### Edit Free-Form Report

Select from the below questions to include in the report.

Manage Filters

Below you can design your own free-form report with the html editor using the tokens provided which will provide text replacement for cumulative 360 style reports. This is a report of cumulative responses for calculating totals per question. This report is not intended for use with the Custom Report for individual response display.

#### Access Type:

Select the access level required to view the report. All report shares utilize unique URL links.

Anonymous

#### Report Name

Final Event Recap PDF report 6-9-2014

#### Current PDF Template:

(that will be autofilled by the individual results)

StudioDEventRecap-6-9-2014.pdf

View PDF

Rescan PDF Update Fields

If you update the PDF, click "Rescan"

Click "Edit" for the acro field mapping menu to map questions to acrobat fields

PDF Field Key	PDF Field Type Name	Question Answer Mapping	Column	Row	Col Ans	EDIT
Brand	TextField	104	-1	-1	0	<a href="#">Edit</a>
Address	TextField	235	-1	-1	0	<a href="#">Edit</a>
Account	TextField	426	-1	-1	0	<a href="#">Edit</a>
Start Time	TextField	380	510	-1	0	<a href="#">Edit</a>
End Time	TextField	379	416	-1	0	<a href="#">Edit</a>
Duration	TextField	236	-1	-1	0	<a href="#">Edit</a>

To view individual responses populated into each PDF, click the "View" or "PDF" icons below.

## Free-Form Reports

CREATE NEW FREE-FORM REPORT

### Manage Free Form Reports

Below you can add, edit or delete free-form Reports.

Viewing Requires a "Report Share" login. When the user clicks the email link they must login to view the report.

To add a login for someone to view a report set their permissions to "Report Share" role from the drop down box. The email address for the user must be the same as the login email address, since both must match in order to view the report.

Access Types: "L" = Login Required (Report share login role or higher)

Reports are filtered by: ALL Surveys

Free-Form Report Name	Date Created	Report Share URL	View	PDF	Edit	Delete	Report Sharing	Access Type
test	08/11/2014	http://16.selectsurvey.net/studioD/FormReport.aspx?RID=123K3					Y <input type="button" value="disable"/>	A
Final Event Recap PDF report 6-9-2014	06/09/2014	http://16.selectsurvey.net/studioD/FormReport.aspx?RID=123K3					<input type="button" value="enable"/>	A

Click "View" or "PDF" to view populated individual responses.



## Reports

Response Review List for Free Form Auto Fill PDF Re

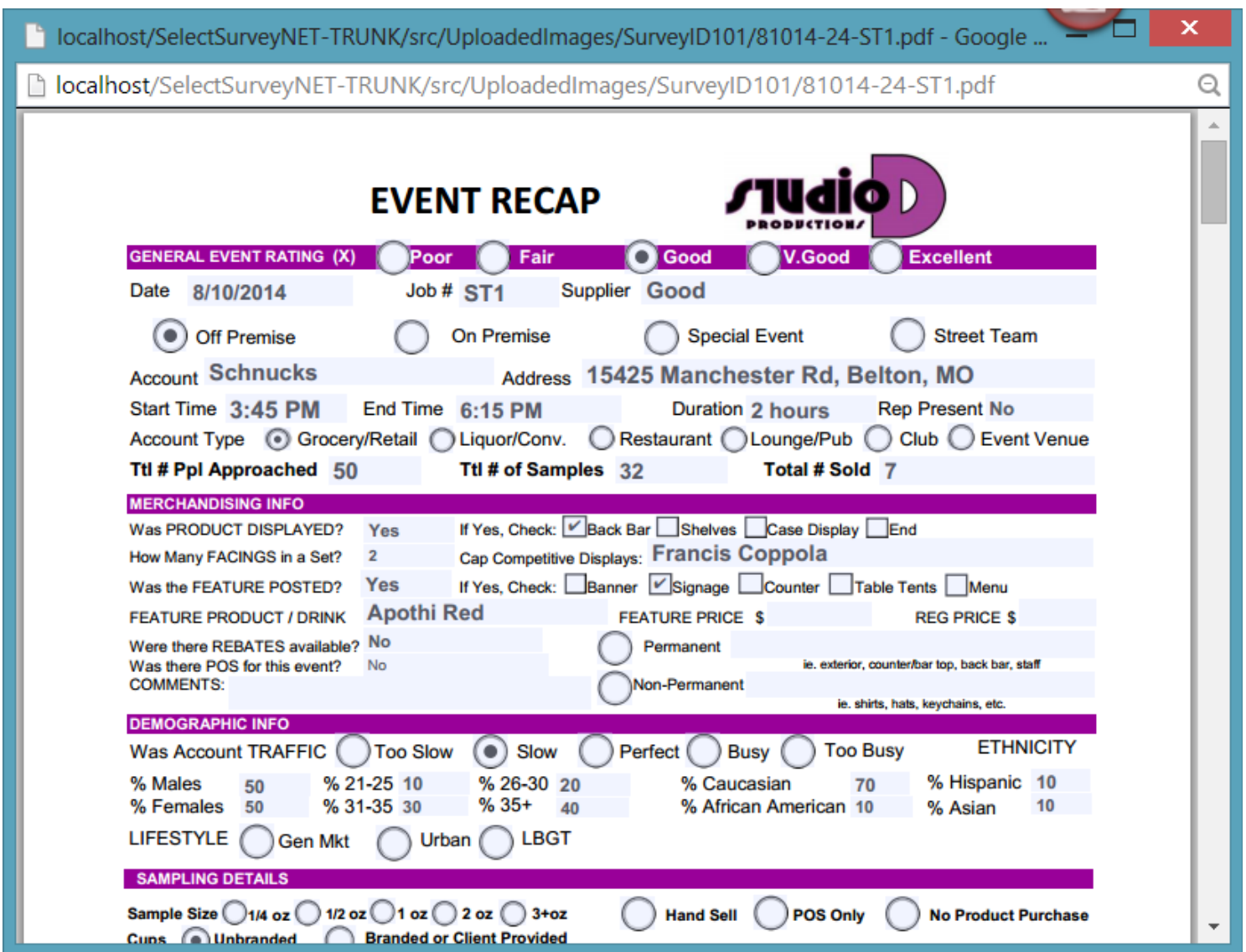
Click "Edit" to edit the individual response.


Click "PDF" to view PDF that is populated with answers.

### List of Responses for Review/Edit

Date	Time	Response ID	Username	First Name	Last Name	Completed	Edit	PDF
8/10/2014	7:45 PM	320	admin	Scott	Zinn	Y		

After clicking "PDF", the individual response is populated into the PDF form, similar to the below example:



**EVENT RECAP** 

**GENERAL EVENT RATING (X)**  Poor  Fair  Good  V.Good  Excellent

Date **8/10/2014** Job # **ST1** Supplier **Good**

Off Premise  On Premise  Special Event  Street Team

Account **Schnucks** Address **15425 Manchester Rd, Belton, MO**

Start Time **3:45 PM** End Time **6:15 PM** Duration **2 hours** Rep Present No

Account Type  Grocery/Retail  Liquor/Conv.  Restaurant  Lounge/Pub  Club  Event Venue

Ttl # Ppl Approached **50** Ttl # of Samples **32** Total # Sold **7**

**MERCHANDISING INFO**

Was PRODUCT DISPLAYED? Yes If Yes, Check:  Back Bar  Shelves  Case Display  End

How Many FACINGS in a Set? **2** Cap Competitive Displays: **Francis Coppola**

Was the FEATURE POSTED? Yes If Yes, Check:  Banner  Signage  Counter  Table Tents  Menu

FEATURE PRODUCT / DRINK **Apothi Red** FEATURE PRICE \$ REG PRICE \$

Were there REBATES available? No  Permanent  Non-Permanent  
ie. exterior, counter/bar top, back bar, staff  
ie. shirts, hats, keychains, etc.

Was there POS for this event? No

**DEMOGRAPHIC INFO**

Was Account TRAFFIC  Too Slow  Slow  Perfect  Busy  Too Busy ETHNICITY

% Males	<b>50</b>	% 21-25	<b>10</b>	% 26-30	<b>20</b>	% Caucasian	<b>70</b>	% Hispanic	<b>10</b>
% Females	<b>50</b>	% 31-35	<b>30</b>	% 35+	<b>40</b>	% African American	<b>10</b>	% Asian	<b>10</b>

LIFESTYLE  Gen Mkt  Urban  LBGT

**SAMPLING DETAILS**

Sample Size  1/4 oz  1/2 oz  1 oz  2 oz  3+oz  Hand Sell  POS Only  No Product Purchase

Cups  Unbranded  Branded or Client Provided

Images and digital signature question types in survey are mapped to acro text boxes:

localhost/SelectSurveyNET-TRUNK/src/UploadedImages/SurveyID101/81014-24-ST1.pdf - Google ...

localhost/SelectSurveyNET-TRUNK/src/UploadedImages/SurveyID101/81014-24-ST1.pdf

**MILEAGE**


Start	End	Total Miles	Driver
10	20		
10	20	10	Stacey Smith

this is for personal tracking puposes; mileage is only chargeable for approved events more than 30 miles outside the metropolitan area

**RECEIPTS**

\*all receipts must be included; expenses unaccounted for with receipts will be the liability of the vendor.

Receipt 1



Receipt 2

## Application Wide Settings Options

Click "Admin Tools" link in upper right corner, then "Application Wide Settings" link. Here you will find the application wide settings such as "Default Survey Template", "Default Days Survey is Open", which when set are the defaults for all new surveys created from scratch.

## Application-Wide Settings

The items on this page should only be changed by an ADMIN IT person that is responsible for installing the application. If you are unsure on the settings email tech@classapps.com or refer to the installation manual.

### Note on date formats:

.NET Globalization settings are in IIS, which is where you will select your Encoding and Culture which is used by the Export, and for datetime formatting. If you are having trouble with your datetime formatting, check the web site IIS .NET Globalization settings. For example Encoding should be set to Windows-1252 if you need time format in hh:mm.

# 1. URL Settings

Application Support Email Address

**Default is "sales@classapps.com". This should be your support email address at your company.**

Application Root URL (Default External URL)

**Default is "http://www.classapps.com/Demos/SelectSurveyNET". This should be the production URL where you installed the survey application.**

Application Intranet (Internal URL) - Optional

**Optional - the internal intranet where you installed the survey application which is only**

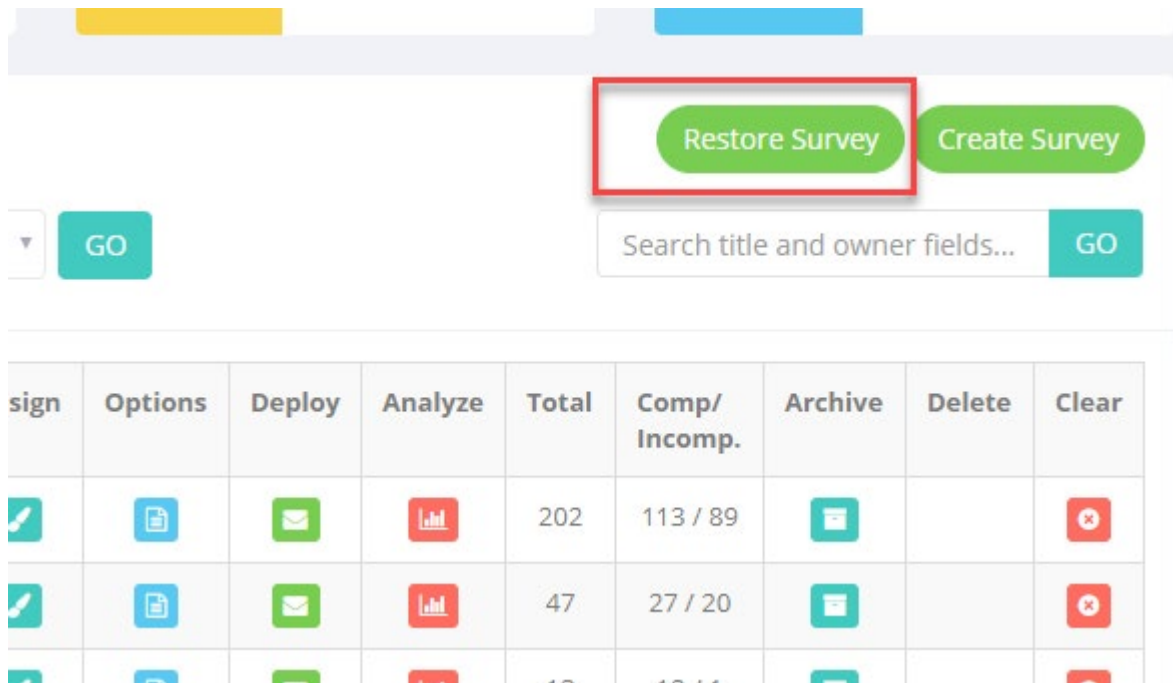
## Archiving and Restoring Surveys from Archive Database

A new feature with 5 is that the archive database is completely separate from the production database. This enables the application to run faster, so you can offload legacy surveys and responses for better performance. If you have ten years of surveys and responses, the application will begin to bog down if you are not updating your memory and hardware to compensate for the extra space, and your database could grow to well over 100 gig.

To remedy this situation, a new “archive and restore” feature is available for all users from the survey list page.

When you click “archive” to the right of a survey name, it will copy that survey into the separate “archive” database and remove it from your production database entirely. The survey will not longer show in the survey list.

In order to “restore” the survey at a later date, you would click “restore survey” button at the top right of the survey list page as shown in the screenshot below:



After you click the button, it will take you to a restore survey page, where you can select the name of the survey you wish to restore from a drop down box as shown in the screenshot below:

## Restore a Survey

Restore Survey from Archive Database to Production Database

This page is for survey owners to unarchive and copy a survey from the archive database to the production database.

If you do not have an archive database or need help



Select Survey name  
you want to restore

Restore Survey Responses Along with Survey

Click below button to start the restore:

(This may take a few moments, especially if copying large amounts of responses. Only click once and wait for completion message below)

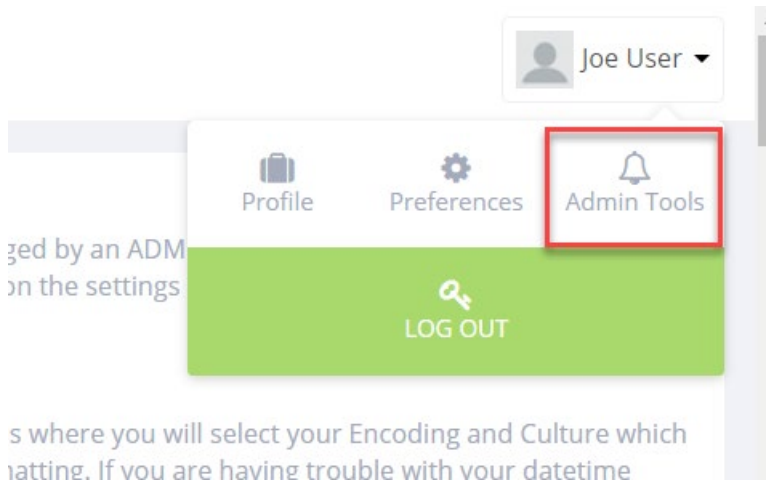
Completion Message:

After you select the survey name from the drop down box, then click "Restore Survey" button. A message will show in red text when it is completed. After it is completed restoring, the survey name will show up in the survey list page again.

## Admin Tools

First, login using and admin account.

Second, click "Admin Tools" link from the user profile menu as shown below.



Below are the various tools you will have access to:

- Account Usage
- General Configuration
- Application Wide Settings
- Database Tokens (Nicknames) used in Dynamic Tokens and Database Question Types
- Web Service/ API Tokens used in Dynamic Tokens and Database Question Types
- Debug Database Connection
- Database Version
- View Logs, Clear Logs
- Database Validation Tool for Surveys
- Database Validation Tool for Libraries
- Data Copy Utility
- User Data Copy Utility
- Delete Report Filters
- Debug Install SMTP Settings – Send Test Email
- Decrypt EID Link or SurveyID
- Specify Company Logo and Copyright Text

- Globalization and Custom Text
- Translate / Edit Global Text
- Translate / Edit Admin Area Text
- Debug International Date Formats
- Unlock Surveys
- Kiosk Admin
- XML Generator Admin
- View Uploaded Images/ Files – Upload Image/File
- Activate / De-Activate Question Types
- Active Directory User Field Synchronization Mapping

## Kiosk Admin

Kiosk Mode is a mode which activates a Kiosk page, which is mostly useful in a kiosk/touchscreen – such as a computer/laptop/touchscreen located in a public place, or used by a sales person in a convention. In this situation, there typically would be a full screen survey page with a button to take the survey. When the respondent walks up to the kiosk they click the button – to start the survey. If configured for a sales person – the sales person can enter the users info, or look up the users info and click a button to login as them and answer the questions as the respondent. In this case you would activate the user lookup/registration feature to display on the Kiosk Home page so the sales person could look up/add respondent information. Alternatively this functionality can be hidden and just have a single anonymous take survey button for each survey activated.

Kiosk Mode is activated on a “per survey” basis, where each survey must be added to the kiosk from the “admin tools” (for security).

To activate Kiosk Admin Home Page, go to “admin tools” > (scroll down to) “Kiosk Admin” > then you will be on the Kiosk Admin page.



## Survey Utilities

### [Unlock Surveys](#)

If a user has locked a survey for editing (on the modify survey page a message stating that the survey is locked for editing unlock it, you can force an unlock on this page. 30 minutes of inactivity by the person that has locked the survey should a need it unlocked immediately use this page to clear the lock.

### [Kiosk Admin](#)

Configure or activate Kiosk Home Page (for exhibitions or kiosk type applications)

### [XML Generator Admin](#)

Configure survey for XML generation and data replacement for Crystal XCelsius Dashboard reporting tool.

### [View Uploaded Images/Files](#) [Upload Image/File](#)

Management of files uploaded by survey respondents if the "upload file" question type was used on a survey.

### [Activate / De-Activate Question Types](#)

De-activating a question type will prevent it from displaying in the drop down box to add it to a survey.

### [ActiveDirectory User Field Synchronization Mapping](#)

From the Kiosk Admin Page, follow the below steps to activate and setup a survey to show on the Kiosk Home page:

1. Copy the Kiosk home page URL for your reference where it says "Activate Kiosk Home Page at:"
2. Click the "Activate Kiosk Home page" checkbox
3. Change the Logo path to your logo on the Kiosk Admin page.
4. Select the survey from the drop down box "Kiosk Surveys"
5. Click the button "add survey to kiosk"
6. Click "save" at bottom of page.
7. Test the URL that you copied from #1 above.



Activate Kiosk Home Page at: <http://26.selectsurvey.net/Demo-EN/KioskHome.aspx>

Activate Kiosk Home Page:



this is the URL you will open full screen on KIOSK

**Kiosk Configuration Settings:**

**Kiosk Logo Path:**

Please enter http path to logo that will display in Kiosk Home Page. (ex: <http://www.yourdomain.com/images/yourlogo.gif>)

Resources/images/KioskLogo.gif

**Kiosk Surveys:**

Add or remove surveys that will be available on the Kiosk Home page.

Demo 3-14-2017

Add Survey to Kiosk

Remove from Kiosk

Survey Title



[Demo 3-14-2017](#)

Remove From Kiosk

**Display User Registration:**

Enter the survey deployment url of the survey you have created that contains the user registration question type. Copy the survey deployment link from the deploy page for the registration survey.

Display User Registration On Kiosk Home Page

**User Registration Survey Deploy URL:**

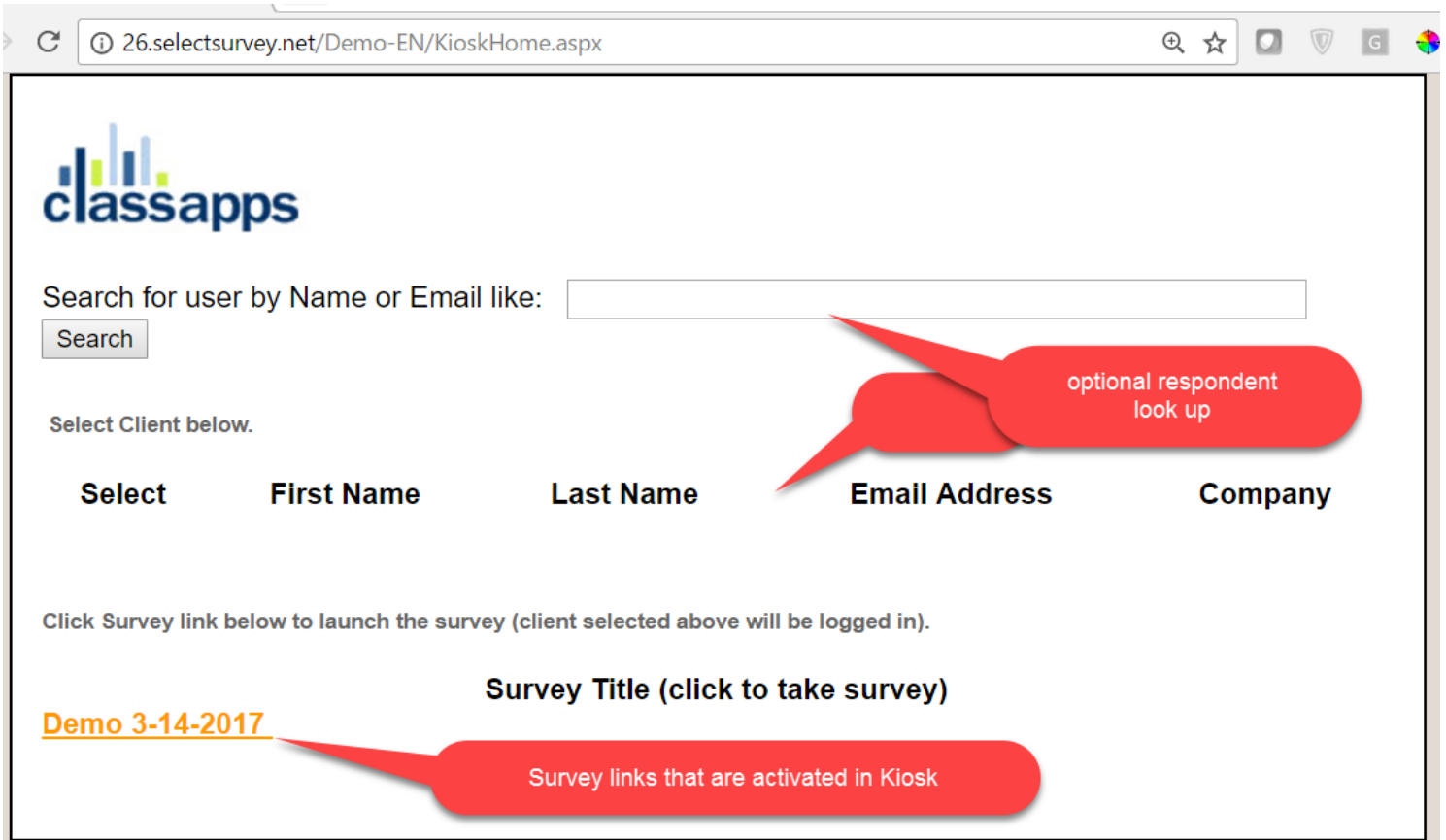
Enter the survey deployment url of the survey you have created that contains the user registration question type. Copy the survey deployment link from the deploy page for the registration survey.

<http://26.selectsurvey.net/Demo-EN/TakeSurvey.aspx?SurveyID=76KH5I8>

Cancel

Save

After you configure the Kiosk home page you go to the URL – make the browser full screen, such as below:



You can change the logo, and look and feel of the page. The search portion will not display if you have not activated the "Display User Registration" box.

When checking the "Display User Registration" box, you must create your desired user registration survey using the "user registration" question type, and copy the deploy URL into the box on the Kiosk Admin page.

## User Reviewers for User Workspace and Approve/Review

Reviewer to User Mapping

Apply to:

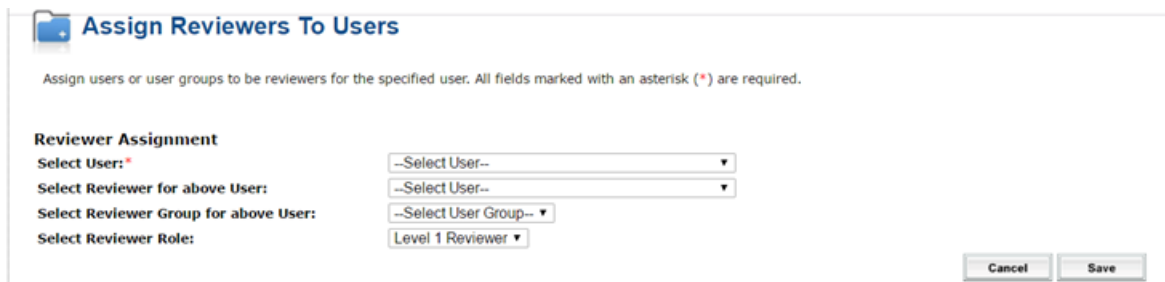
- User Workspace
- Analyze > Approve/Review

Users can be mapped into roles of reviewers for the review/approval process features built into the User Workspace of SelectSurvey.NET. Once a user is set as a reviewer, they can approve or reject survey responses in the user workspace for those they review for, and can approve/review via the analysis pages as well and submit comments below each question on the survey that can only be hidden for admin, or comments back to the respondent for further response updates.

Click “Users” > “Reviewer Map” to view the list of existing user reviewers.

Then click “Create User to Reviewer Mapping” to map a user or user group to a reviewer role.

Below is the screen to map a reviewer to a user. That means the reviewer has permission to see, comment on and approve/reject any response for that user in the user workspace, or in the approve/review screens.



The built in review levels for a three tier review are below:

- Level 1 Reviewer
- Level 2 Reviewer
- Level 3 - Legal Reviewer

Level 2 and 3 are not required. You can use a single review tier for simplicity.

After you add a reviewer they will show in the list:



Delete	User Name	Reviewer Name	Reviewer User Group Name	Edit
		Jane Doe		

## User Workspace

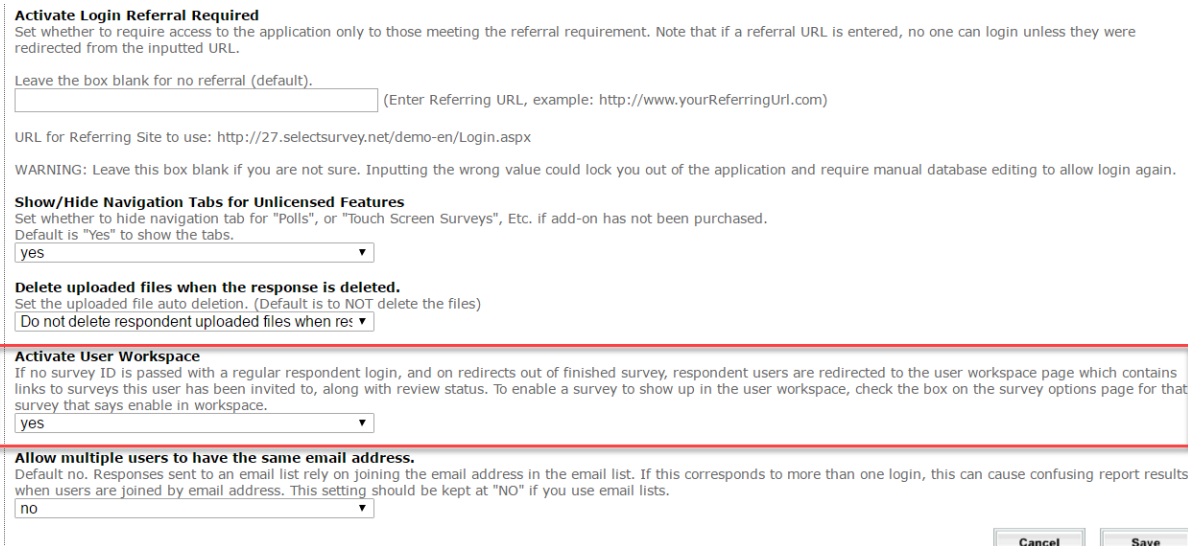
The user workspace is a portal for respondents, that shows a list of surveys that the user has been “invited” to take.

Reviewers are NOT required for the user workspace, but if reviewers are set up, they will see the user's survey list for those users that they are mapped to "review" for.

### How to Enable the User Workspace Feature:

If you do not see the user workspace tab in the SelectSurvey.NET interface, then you need to enable the feature in admin tools by following the below steps:

- Login as an admin user
- Go to "Admin Tools" > "Application Wide Settings"
- Scroll down to "Feature Defaults" section > "Activate User Workspace" > change drop down to yes, click save:



**Activate Login Referral Required**  
Set whether to require access to the application only to those meeting the referral requirement. Note that if a referral URL is entered, no one can login unless they were redirected from the inputted URL.

Leave the box blank for no referral (default).  
 (Enter Referring URL, example: http://www.yourReferringUrl.com)

URL for Referring Site to use: http://27.selectsurvey.net/demo-en/Login.aspx

WARNING: Leave this box blank if you are not sure. Inputting the wrong value could lock you out of the application and require manual database editing to allow login again.

**Show/Hide Navigation Tabs for Unlicensed Features**  
Set whether to hide navigation tab for "Polls", or "Touch Screen Surveys", Etc. if add-on has not been purchased.  
Default is "Yes" to show the tabs.  
yes

**Delete uploaded files when the response is deleted.**  
Set the uploaded file auto deletion. (Default is to NOT delete the files)  
Do not delete respondent uploaded files when res: ▼

**Activate User Workspace**  
If no survey ID is passed with a regular respondent login, and on redirects out of finished survey, respondent users are redirected to the user workspace page which contains links to surveys this user has been invited to, along with review status. To enable a survey to show up in the user workspace, check the box on the survey options page for that survey that says enable in workspace.  
yes

**Allow multiple users to have the same email address.**  
Default no. Responses sent to an email list rely on joining the email address in the email list. If this corresponds to more than one login, this can cause confusing report results when users are joined by email address. This setting should be kept at "NO" if you use email lists.  
no

Cancel Save

### How to Enable a survey to show in the User Workspace:

On the survey options page for the survey, click the checkbox that says "Show in User Workspace" as shown in the screen below:

General Display **Access** Completion ActiveLogic Report Advanced Validation

**Respondent Access Level** [Response Level Help](#)

**Authentication** Anonymous

**Responses** Multiple Responses Not Updateable

Note: Resumable response types will resume to the LAST page edited, not the following page.  
 Note: Login required survey links will redirect user to login page, then automatically back to survey if they are not already logged in. Note: Kiosk option must be enabled in admin tools due to security

**User Workspace:** When checked, this survey will show in the user workspace (based on the access defined here on this page). The user workspace always requires a login. Note: User workspace must be activated in admin tools to use this feature.  
 Show in User Workspace

**IP Address Range:** There are no IP address ranges configured for this survey. Click the "Configure" button to add IP address validation or to learn more. [Configure](#)

**User Group Restrictions:** Only the below user groups can take the survey. There are no User Group restrictions configured for this survey. Click the "Configure" button to add User Group validation or to learn more. [Configure](#)

**AD User Group Restriction:** Only the below AD user groups can take the survey. There are no AD Group restrictions configured for this survey. Click the "Configure" button to add AD User Group validation or to learn more. Active Directory Authentication is not enabled. [Configure](#)

### How to Enable a specific user or user group to see a survey in their User Workspace:

By default, if a survey is enabled for user workspace, all users with a login will see it in their user workspace. If the survey has a user group restriction, then only the users in the user group will see the survey in the user workspace.


On the survey options > Access tab, add specific users to the user group restrictions, or AD user group restrictions for the survey.

**User Group Restrictions:** Only the below user groups can take the survey. There are no User Group restrictions configured for this survey. Click the "Configure" button to add User Group validation or to learn more.

**AD User Group Restriction:** Only the below AD user groups can take the survey.

### What the User Sees:

Welcome Joe User (Logout) [Account](#)



- User: Joe User
- Your Position
- Group:

Survey	Status	Date Assigned	Actions
test single response in workspace	Under Review	9/26/2016 7:08:09 PM	
Test Hover Text	Not Started	9/7/2016 8:29:51 AM	<a href="#">Go To Survey</a>
testIDate	Not Started	9/8/2016 1:05:08 PM	<a href="#">Go To Survey</a>
new touch single choice buttons question type demo	Not Started	10/31/2016 1:55:05 PM	<a href="#">Go To Survey</a>

Records per page: 100 Records: 1 - 4 of 4 - Pages: [<<](#) [1](#) [>>](#)

- Last Updated: 4/28/2014
- By: Joe User
- Contact

## How to White Label/Brand the User Workspace:

You can change the look and feel of the User Workspace page that respondents see.

To customize the look and feel of the page follow the below steps:

- Login as an admin user
- Click "admin tools" > "White Label Branding" > "Specify Company Logo, Footer Text, Login Stylesheet, User Workspace Template"

**USER WORKSPACE WHITE LABEL / BRANDING**

Check to Display Account Link in User Workspace Show/Hide Edit Account Link in user workspace

Specify the template to use for the User Workspace page. The User Workspace page (userworkspace.aspx) is shown to the respondent user if they are "invited" to surveys and shows a list of their surveys they have responded to, and their review status.  
 Select the template with the style sheet and html that you want to be used to outline the user workspace survey list.

Enter the path to your company logo for the User Workspace page. The width is 250px and located above the left navigation on the UserWorkspace.aspx page.  
 Default value: Resources/Images/classapps\_logo\_wider.jpg  
 If you uploaded logo to server the path is: UploadedImages/yourimage.jpg  
 Custom Logo

Enter the text/html for the user workspace left navigation.

Default Text:  
 User: ###UD=FIRST\_NAME### ##UD=LAST\_NAME###  
 ###UD=CURRENT\_POSITION###  
 Group: ##UD=DEPARTMENT###

You can enter user data tokens or whatever text you want to display in the left margin of the user workspace.

File Edit Insert View Format Table Tools

Font Family Font Sizes

- o User: ###UD=FIRST\_NAME### ##UD=LAST\_NAME###
- o ##UD=CURRENT\_POSITION###
- o Group: ##UD=DEPARTMENT###

- o Last Updated: 4/28/2014
- o By: ##UD=FIRST\_NAME### ##UD=LAST\_NAME###

- [Contact](#)

This text shows in the left margin of the User Workspace. You can use tokens here, or you can delete them.

## 3<sup>rd</sup> Party API Integration:

### *Workfront Project API – Push Survey Data into new Project Issues*

When someone completes a survey, it can automatically push the survey answer data into Workfront Project creating a new “Issue” in an existing “Project” in Workfront Project.

You can accomplish this with the built in interface inside SelectSurvey with no programming!

Below are the steps and screenshots to accomplish a data push of survey data to Workfront.

The first step is to setup a Web Service Token in “admin tools” that contains the URL, username and password to access the web service or 3<sup>rd</sup> party API.

#### **Add web service token:**

Click “Admin Tools” > “Web Service/API Tokens used in Dynamic Tokens and Database Question Types”.



Click “Create Web Service Token” as shown in above screenshot.

Enter the username, password and URL in the screen shown below, then click “Save”.

## Web Service Token (Nickname) Assignment

[WEB SERVICE TOKEN LIST](#)

### Add Web Service/API Token (Nickname):

**Web Service Token Nickname:** \*

Token Nicknames must be unique. No special characters are allowed.

 Example: country

**Web Service Name (SOAP) or Web Service Contract (WCF):** \*

No special characters are allowed.

SOAP Example: country  
WCF Example: IAdministration

**Web Service/API URL (SOAP) or Web Service Endpoint (WCF):** \*

i.e. http://your.com/yourapi.asmx

SOAP Example: http://www.websvcex.net/country.asmx  
WCF Example: http://webservices.com/webservices/Administration.svc

**Web Service/API Method:** \*

Enter the method for this API ex: GetCountries() The arguments, if any, are specified on the edit item page.

 Example: GetCountries

### Optional Additional Configuration:

**Web Service/API Credentials Username:** \*

Enter the username required to access the API.

 Example: (leave blank)

**Web Service/API Credentials Password:** \*

Enter the password required to access the API.

 Example: (leave blank)

**Web Service/API Credentials Encryption Key:** \*

Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.

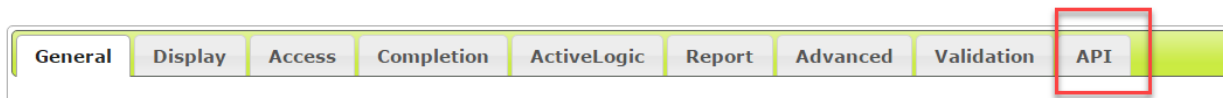
 Example: (leave blank)


## Now you can setup the Workfront Project Mapping Integration:

- 1) On the Survey List page, click "Survey Options" icon next to the survey that you want to push data to Workfront Project:

Manage	Status	Title (click to preview)	Date Created	Design	Options	Deploy	Analyze	Total	Comp/Incomp.	Archive	Delete	Clear
<a href="#">CLOSE</a>	Open	Test Survey	02/09/2018					0	0 / 0			
<a href="#">LAUNCH</a>	Design	Smileys	02/07/2018					0	0 / 0			
<a href="#">CLOSE</a>	Open	test for star question type	10/12/2017					1	0 / 1			

- 2) Click the "API" tab on the Survey Options page.



- 3) Click the "Workfront Project API Configuration" link



General | Display | Access | Completion | ActiveLogic | Report | Advanced | Validation | **API**

**API Integrations - Push / Pull Data from Survey to 3rd party API.**

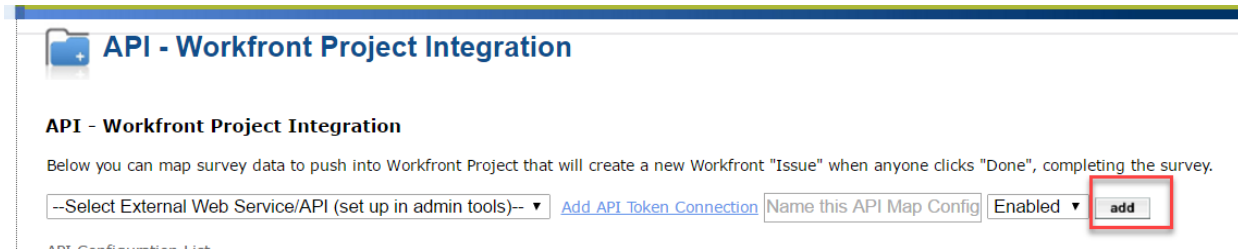
Note that an account may be required with the 3rd party service for the below API integrations.

**Workfront Project API**  
[Workfront Project API Configuration](#)

**SalesForce API**  
[SalesForce API Configuration](#)

**SugarCRM API**  
[SugarCRM API Configuration](#)

- Click "Add" after selecting the Workfront Project API from the drop down box, entering a name for the mapping, and select whether it is enabled or disabled.



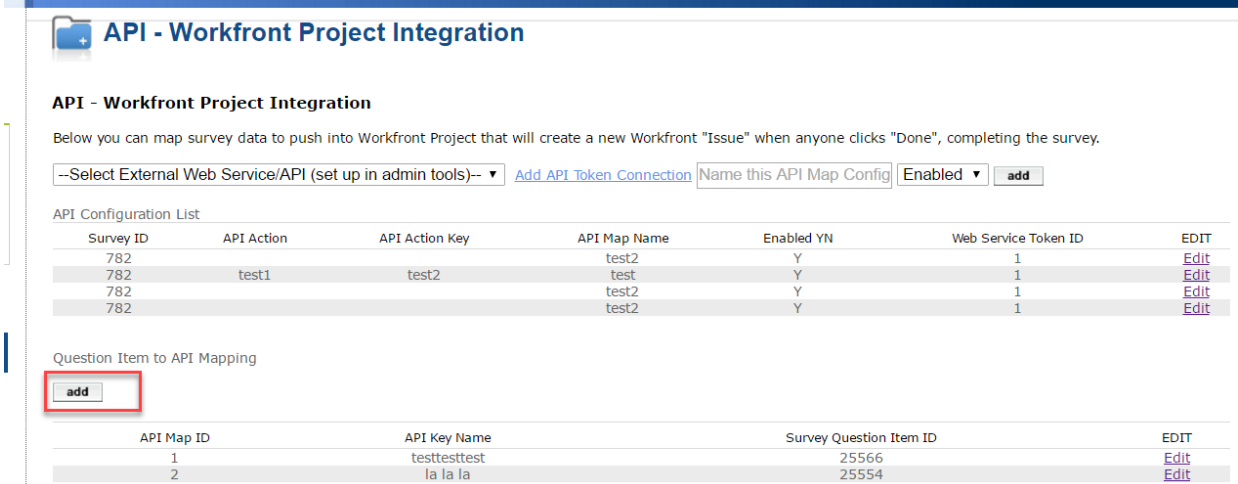
**API - Workfront Project Integration**

**API - Workfront Project Integration**

Below you can map survey data to push into Workfront Project that will create a new Workfront "Issue" when anyone clicks "Done", completing the survey.

--Select External Web Service/API (set up in admin tools)-- [Add API Token Connection](#) Name this API Map Config Enabled

- Click "Add" to select survey questions to map to workfront project issue custom fields:



**API - Workfront Project Integration**

**API - Workfront Project Integration**

Below you can map survey data to push into Workfront Project that will create a new Workfront "Issue" when anyone clicks "Done", completing the survey.

--Select External Web Service/API (set up in admin tools)-- [Add API Token Connection](#) Name this API Map Config Enabled

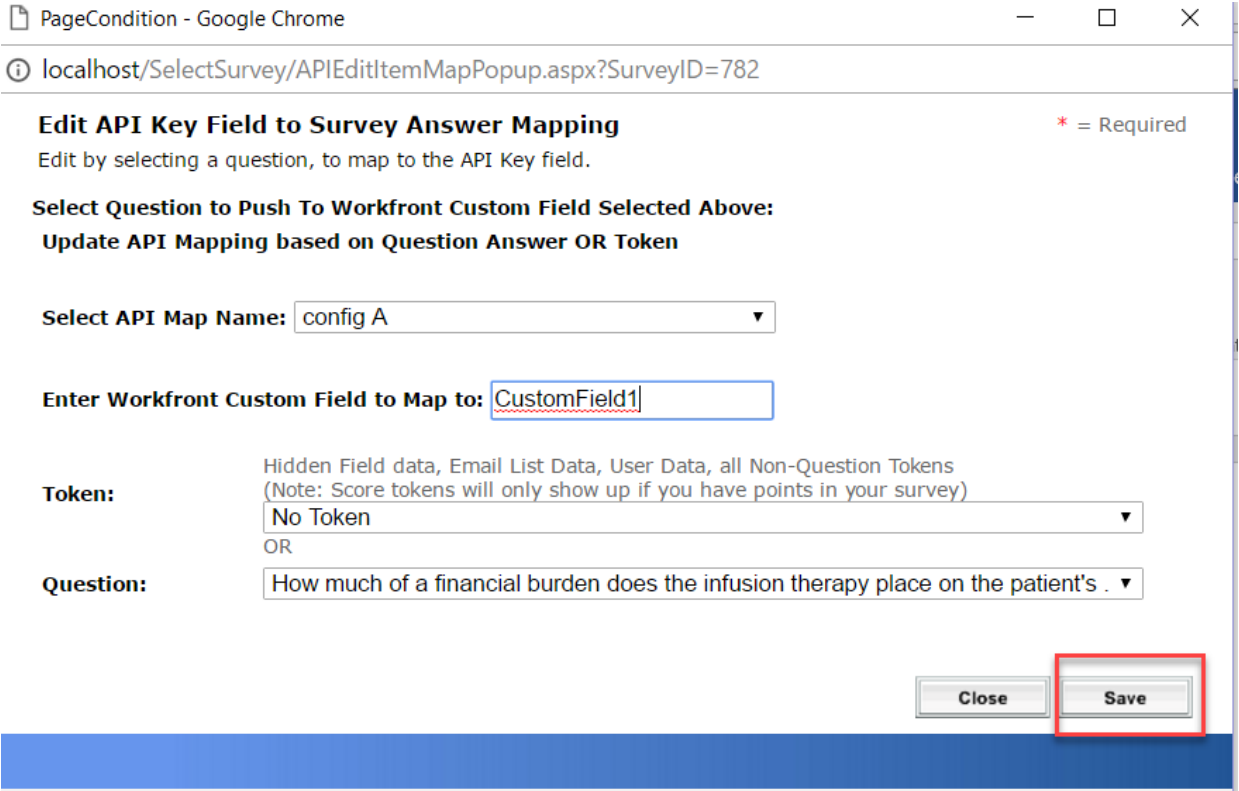
API Configuration List

Survey ID	API Action	API Action Key	API Map Name	Enabled YN	Web Service Token ID	EDIT
782			test2	Y	1	<a href="#">Edit</a>
782	test1	test2	test	Y	1	<a href="#">Edit</a>
782			test2	Y	1	<a href="#">Edit</a>
782			test2	Y	1	<a href="#">Edit</a>

Question Item to API Mapping

API Map ID	API Key Name	Survey Question Item ID	EDIT
1	testtesttest	25566	<a href="#">Edit</a>
2	la la la	25554	<a href="#">Edit</a>

6) Click "Save" on the pop up after selecting the question and entering the custom field into the



PageCondition - Google Chrome  
localhost/SelectSurvey/APIEditItemMapPopup.aspx?SurveyID=782

**Edit API Key Field to Survey Answer Mapping** \* = Required  
Edit by selecting a question, to map to the API Key field.

**Select Question to Push To Workfront Custom Field Selected Above:  
Update API Mapping based on Question Answer OR Token**

Select API Map Name: config A

Enter Workfront Custom Field to Map to: CustomField1

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: How much of a financial burden does the infusion therapy place on the patient's

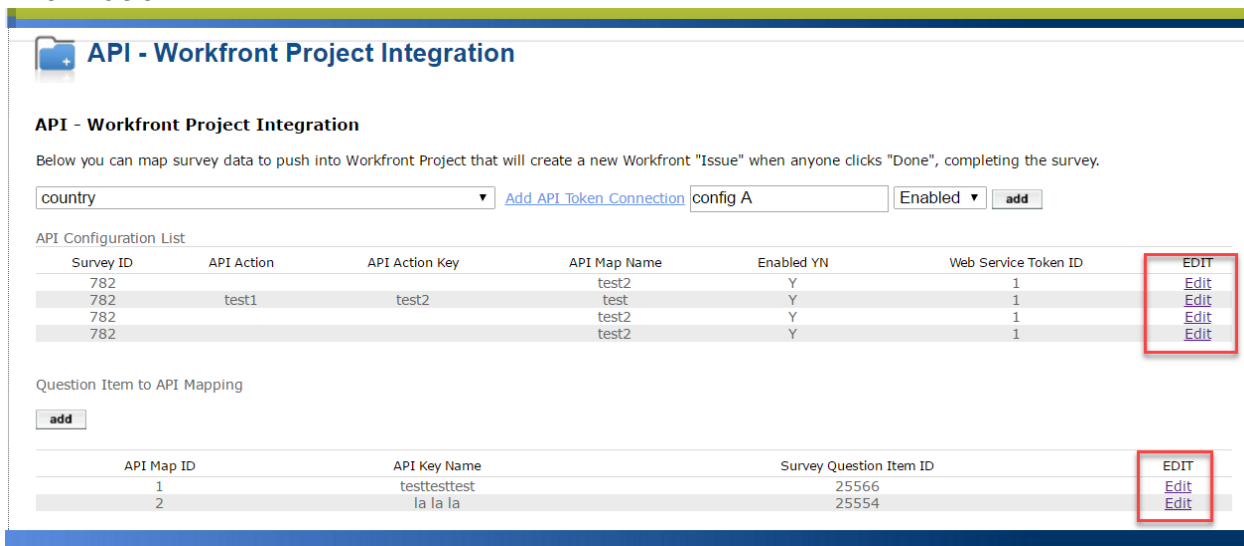
Close Save

text box

7) Test the mapping.

To Edit the mapping:

1) Click the "Edit" button to the right of the mapping and a pop up will display to edit that rows information.



**API - Workfront Project Integration**

API - Workfront Project Integration

Below you can map survey data to push into Workfront Project that will create a new Workfront "Issue" when anyone clicks "Done", completing the survey.

country Add API Token Connection config A Enabled add

API Configuration List

Survey ID	API Action	API Action Key	API Map Name	Enabled YN	Web Service Token ID	EDIT
782			test2	Y	1	Edit
782	test1	test2	test	Y	1	Edit
782			test2	Y	1	Edit
782			test2	Y	1	Edit

Question Item to API Mapping

add

API Map ID	API Key Name	Survey Question Item ID	EDIT
1	testtesttest	25566	Edit
2	la la la	25554	Edit



### *SalesForce API*

SalesForce API Integration is coming soon.

### *SugarCRM API*

SugarCRM API Integration is coming soon.





## Obtaining Technical Support Resources

### *General Technical Support Requests*

General Technical Support can be obtained by any of the below methods:

- By Email to [tech@classapps.com](mailto:tech@classapps.com)
- By filling in a Trouble Ticket: <http://www.classapps.com/SupportTicket.asp>
- By calling 800-774-4876 (Press 2 to go directly to technical support). Note that if all tech support people are on the phone, that your voice mail will be transcribed and emailed to all tech support staff, and can be answered while they are on other calls, so please leave a message for the fastest response. Also note that only "Level 2" support includes phone support. All other levels include email support only.

When contacting technical support, you will need to provide the below:

- **Customer ID Number (Login):** \_ \_ \_ \_ \_

The customer ID number and password is assigned and emailed to client upon purchase. The customer ID and password above is used to access product updates, product downloads, renew support, print receipts, print estimates, access to license keys.

Other information on the technical support ticket might include:

- **SelectSurvey.NET Version Number:** v\_ . \_ \_ \_ . \_ \_ \_

The database version number is found in the footer of every page in SelectSurvey.NET application.

- **Database Type:** \_ \_ \_ \_ \_

Supported database types are MS SQL (2005 or later), Oracle (10 or later), or MySQL (6 or later).

- **IIS Version:** \_ \_

Supported IIS Versions are iis 6, iis 7, iis 7.5 or greater.

### *Installation Service/Upgrade Service/Consulting Request*

To obtain an estimate for installation service, upgrade service or consulting by the hour for survey design, custom reports or programming custom features, contact [sales@classapps.com](mailto:sales@classapps.com) or call 800-774-4876 (press 1 for sales).





Installation Service and Upgrade Service are available for a per instance fee. Currently that fee is \$150 USD. That covers a technical support person that would RDP into the server to update the files in IIS, set permissions on survey folder, and run a database script. The installation service only covers installing the application, and does not include DNS setup, MS SQL install, IIS install or general server setup or network setup.

Consulting is available by the hour, programming and survey design consulting is available, as well as anything above and beyond a normal installation/upgrade service.

### *Support Knowledgebase*

SelectSurvey.NET has a public helpdesk that you can search for common issues. You can access the knowledgebase from here: <http://www.classapps.com/helpdesk/categorized.asp> Click "Search" to search for a keyword.

### *Support Documentation/Videos*

All documentation is linked from the ClassApps.com website as well as included in the product download zip file in the "documentation" folder.

<http://www.classapps.com/SelectSurveyDocumentation.asp>

Videos demonstrating features and installation are located here:

<http://www.classapps.com/Videos.asp>

The general support page that links all support related links is located here:

<http://www.classapps.com/Support.asp>

### *Product Updates / Critical Security Warnings*

Product updates occur each month due to new features, and updates required from new browser releases, or new mobile device releases. Some updates are also required due to security issues that might arise due to vulnerabilities in windows servers, browsers, or other related technology issues.

It is very important to stay aware of any critical security issues or product updates. The way to do this is to sign up for the SelectSurvey.NET RSS feed, or follow the SelectSurvey Twitter or Facebook page. All of these 3 communication channels update automatically any time we make a release. The release summary is posted to each of these sites simultaneously. The full release notes are included in the product download zip, and critical security concerns are only visible from the client login area after logging in. If there is a critical security issue, we post that there is a





critical security issue, and the details of the risk and instructions will be posted in the client login area to minimize risks to client installs.

Product updates can be obtained from any of the following methods:

- RSS Feed: (<http://classapps.com/rss/SelectSurveyupdates.asp>) to add the RSS feed click the RSS Feed button here: <http://www.classapps.com/Support.asp>
- Twitter: <http://twitter.com/SelectSurveyNET>
- Facebook: <http://www.facebook.com/SelectSurvey.NET>

