



# Select Survey .NET

Basic Training **v5**

# SelectSurvey.NET Basic Training

v.5.0 6/2019

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

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# Getting Around the Application

## Login

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

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

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

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

SELECTSURVEY.NET V5

If you are a new user, please click here to register.

Enter Username

Enter Password

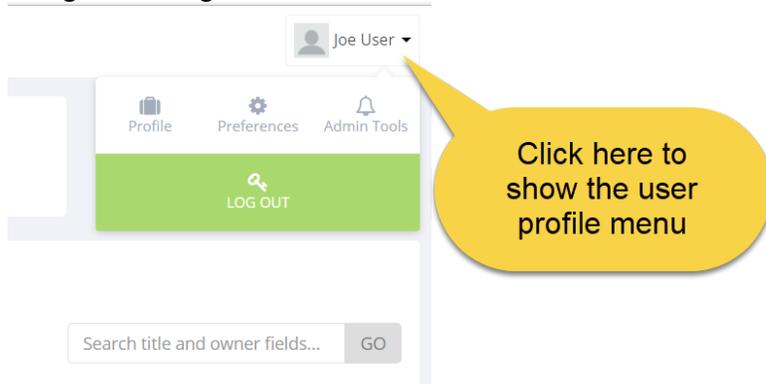
SIGN IN

If you forgot your password, please click here.

Powered by SelectSurvey.NETv5.000.000  
Copyright 2002-2018 ClassApps Inc

## Logout

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



## Changing your Password

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

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

Password Requirements:

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

Steps with screenshots:

- 1) Click LOGIN button

# STATE UNIVERSITY

If you would like to log into the application, please click [here](#).

LOGIN

Please enter the ID of the survey you wish to take in the box below.

Enter Survey ID

TAKE SURVEY

Questions? Contact the survey administrator at [cit@easternct.edu](mailto:cit@easternct.edu)

Click LOGIN button

2) click "Forgot Password"

# STATE UNIVERSITY

Enter Username

Enter Password

SIGN IN

If you forgot your password, please click [here](#).

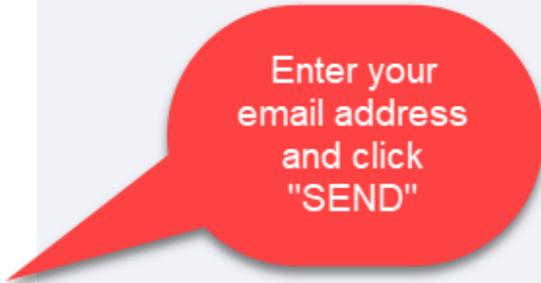
Click "forgot your password" link text

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

# STATE UNIVERSITY

## Forgot Password

Please enter your email address below. You will get an email and have to enter a verification code.



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

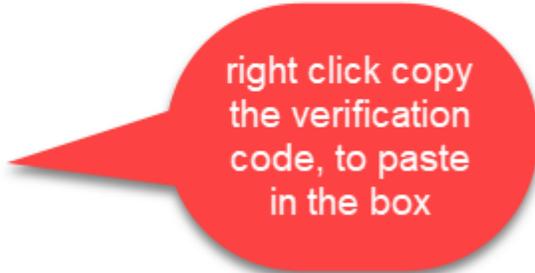


## Verification Code for SelectSurvey.NET Inbox x



[Redacted] .edu via sendgrid.net  
to me ▾

Verification Code: [Redacted]Gk6rqip0kUhtFg



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

# STATE UNIVERSITY

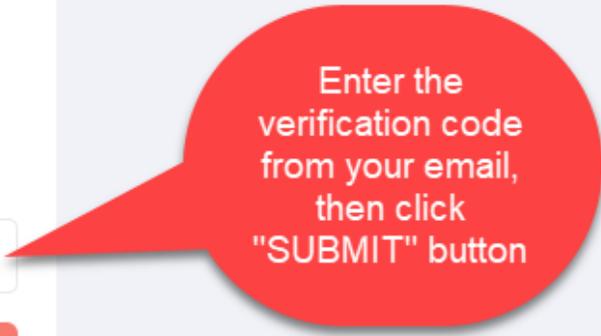
Forgot Password

Check your email for the verification code and enter it in the box below.

**Verification Code**

SUBMIT

CANCEL

A red speech bubble callout with a white border and a drop shadow, pointing to the verification code input field. It contains white text.

Enter the verification code from your email, then click "SUBMIT" button

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

## SELECTSURVEY.NET V5

You must change your password, enter NEW password below:

**Password Requirements:**

- 1) must contain at least one lowercase letter
- 2) must contain at least one uppercase letter,
- 3) must contain at least one symbol  
(!,@,#,\$,%^,&,\*?\_~,-,.,,)) OR number.
- 4) You cannot reset your password with your last/current password.

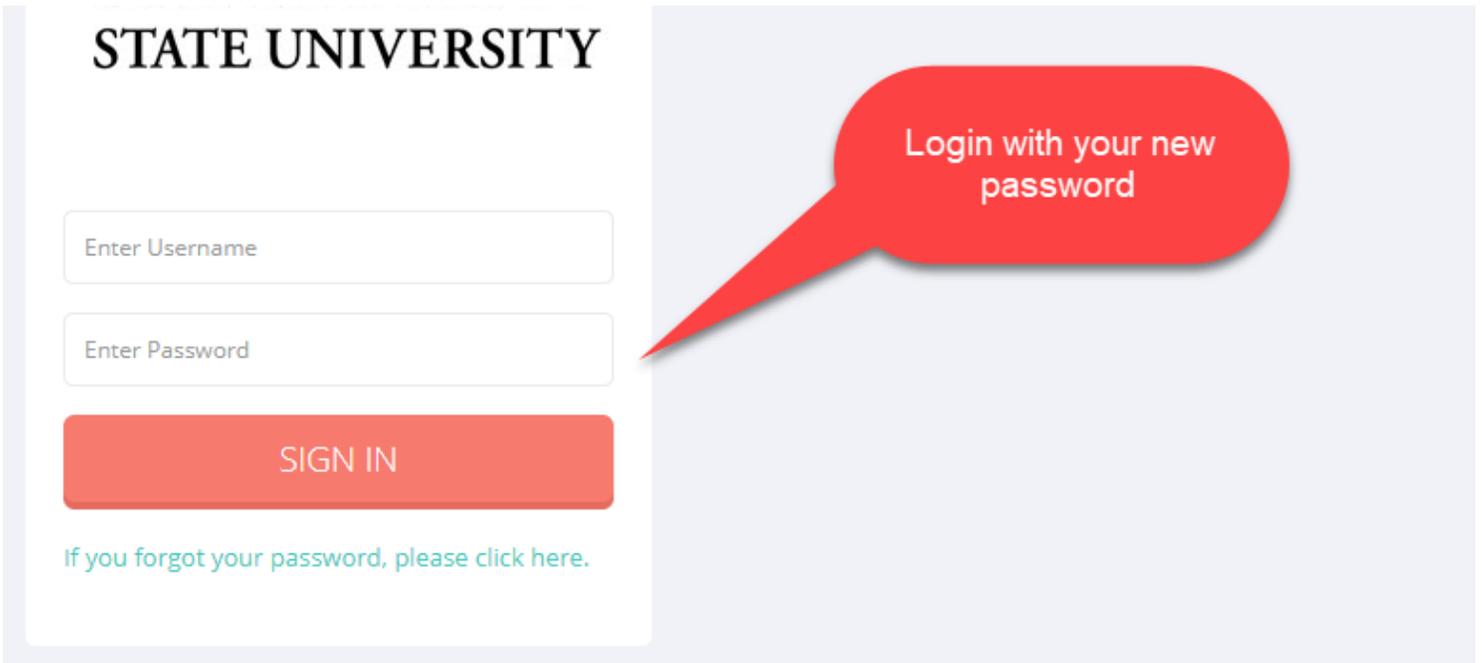
CHANGE PASSWORD

Powered by SelectSurvey.NET v5.025.002



Enter your new password in both boxes then click "CHANGE PASSWORD"

6) Login with your new password



## Dashboard

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

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

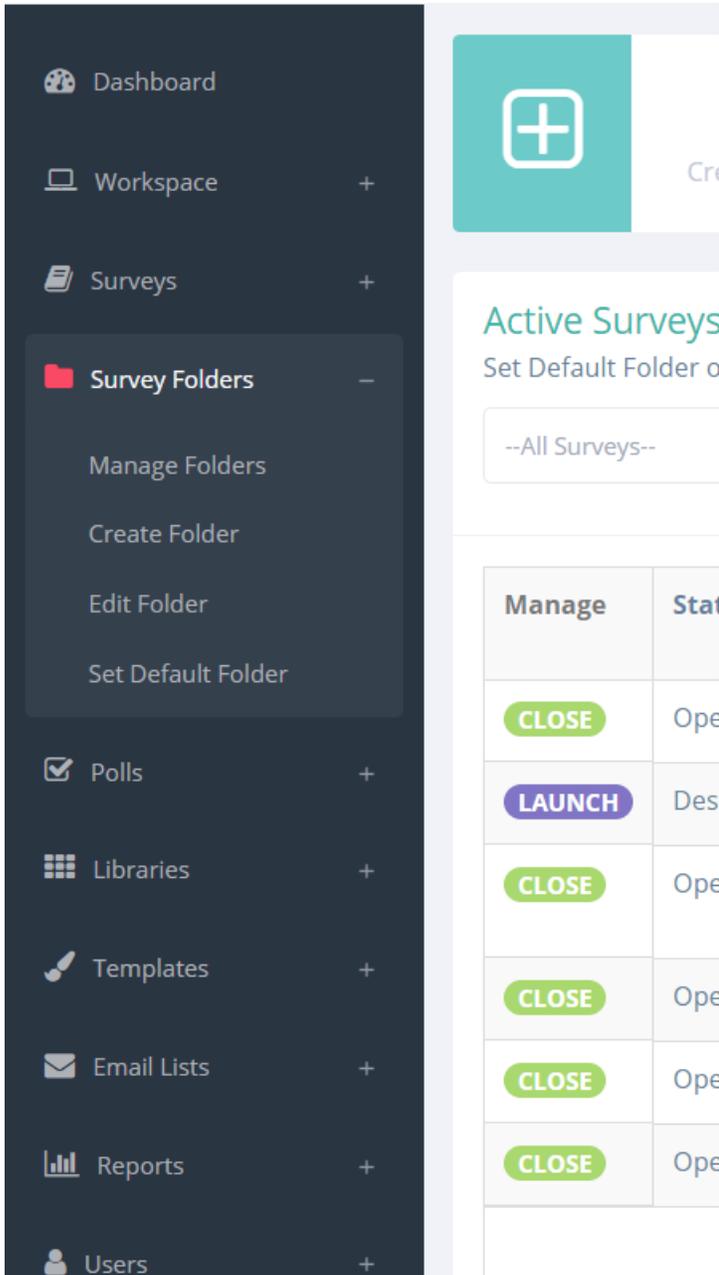
The screenshot shows the SELECTSURVEY.NET V5.0 dashboard. The top navigation bar includes a hamburger menu icon, the text "SELECTSURVEY.NET V5.0", a notification bell with a "7" badge, and a user profile for "Joe User". The dashboard features four main statistics cards: "Create Survey" (5), "Email Lists" (100), "Reports" (121), and "Help" (Customer ID: 622998). Below these is the "Active Surveys" section, which includes a dropdown menu set to "--All Surveys--" and a search bar. The main content is a table of active surveys.

| Manage | Status | Title (click to preview)    | Date Created | Design | Options | Deploy | Analyze | Total | Comp/Incomp. | Archive | Delete | Clear |
|--------|--------|-----------------------------|--------------|--------|---------|--------|---------|-------|--------------|---------|--------|-------|
| LAUNCH | Design | Smileys                     | 02/07/2018   | ✓      | 📄       | 📧      | 📊       | 0     | 0 / 0        | 🗳️      |        |       |
| CLOSE  | Open   | test for star question type | 10/12/2017   | ✓      | 📄       | 📧      | 📊       | 1     | 0 / 1        | 🗳️      |        | 🗑️    |
| CLOSE  | Open   | test3                       | 10/08/2017   | ✓      | 📄       | 📧      | 📊       | 1     | 0 / 1        | 🗳️      |        | 🗑️    |
| CLOSE  | Open   | test2                       | 10/08/2017   | ✓      | 📄       | 📧      | 📊       | 0     | 0 / 0        | 🗳️      |        |       |
| CLOSE  | Open   | test                        | 06/21/2017   | ✓      | 📄       | 📧      | 📊       | 19    | 6 / 13       | 🗳️      |        | 🗑️    |

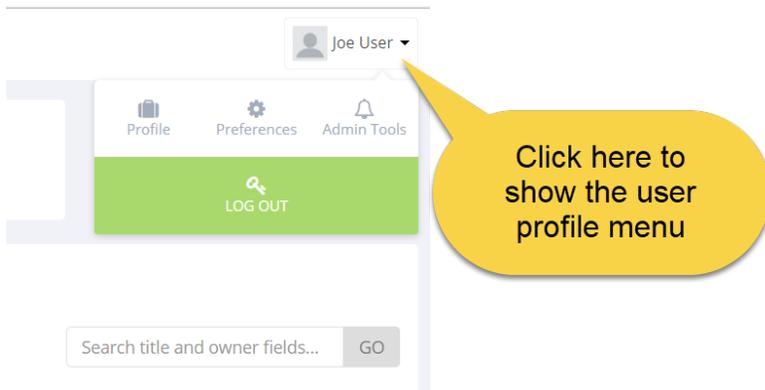
To collapse the left menu, click the menu icon as shown below:

This screenshot shows the same dashboard as above, but with a yellow callout bubble pointing to the hamburger menu icon in the top left corner. The text inside the bubble reads: "Click to collapse left menu for more screen space". The left sidebar menu is partially visible, showing items like "Dashboard", "Workspace", "Surveys", "Survey Folders", "Polls", and "Libraries".

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



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



**To search for a survey:**

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

| Manage        | Status | Title (click to preview) | Date Created | Design | Options | Deploy | Analyze | Total | Comp/ Incomp. | Archive | Delete | Clear |
|---------------|--------|--------------------------|--------------|--------|---------|--------|---------|-------|---------------|---------|--------|-------|
| <b>LAUNCH</b> | Design | Smileys                  | 02/07/2018   |        |         |        |         | 0     | 0 / 0         |         |        |       |
| <b>CLOSE</b>  | Open   | test                     | 06/21/2017   |        |         |        |         | 19    | 6 / 13        |         |        |       |

**To access all surveys in a folder:**

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

## Active Surveys

Set Default Folder on User Preference Page

| Manage        | Status | Title (click to preview) | Date Created | Design  | Options   | Deploy  |
|---------------|--------|--------------------------|--------------|---|---|---|
| <b>CLOSE</b>  | Open   | Test Survey              | 02/09/2018   |  |  |  |
| <b>LAUNCH</b> | Design | Smileys                  | 02/07/2018   |  |  |  |

## Creating Surveys

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

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

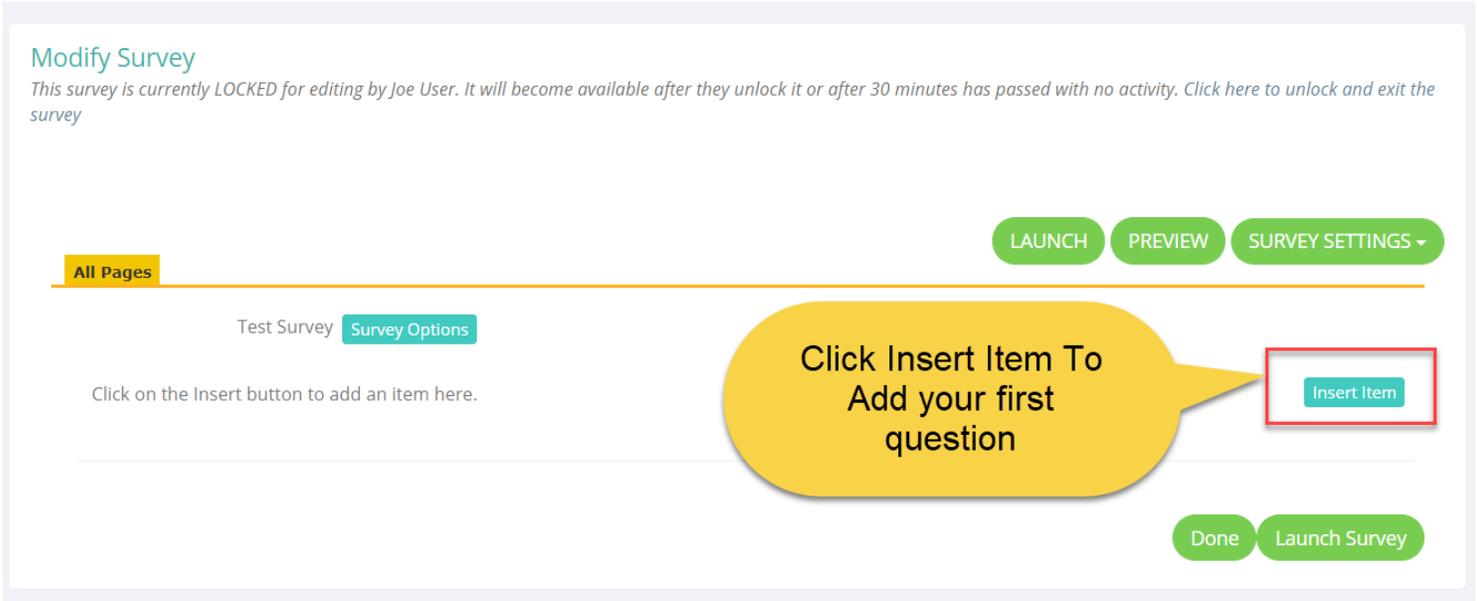
## Create a Survey from Scratch

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

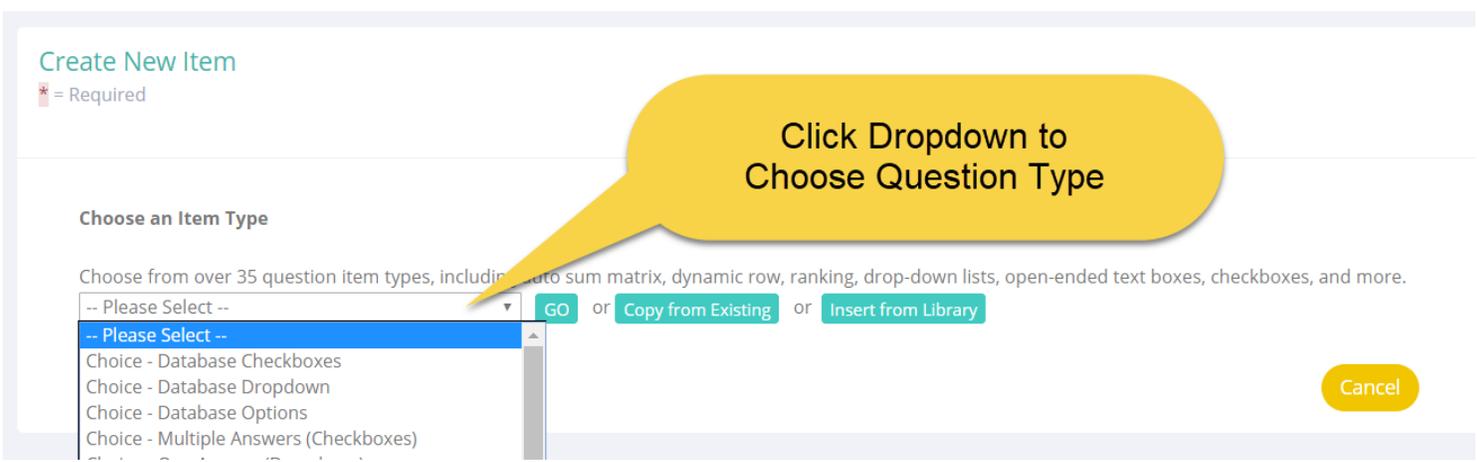
| Manage                 | Status | Title (click to preview)    | Date Created | Design                              | Options                  | Deploy                   | Analyze                  | Total | Comp/Incomp. | Archive                  | Delete | Clear                    |
|------------------------|--------|-----------------------------|--------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------|--------------|--------------------------|--------|--------------------------|
| <a href="#">LAUNCH</a> | Design | Smileys                     | 02/07/2018   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0     | 0 / 0        | <input type="checkbox"/> |        |                          |
| <a href="#">CLOSE</a>  | Open   | test for star question type | 10/12/2017   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1     | 0 / 1        | <input type="checkbox"/> |        | <input type="checkbox"/> |
| <a href="#">CLOSE</a>  | Open   | test3                       | 10/08/2017   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 1     | 0 / 1        | <input type="checkbox"/> |        | <input type="checkbox"/> |
| <a href="#">CLOSE</a>  | Open   | test2                       | 10/08/2017   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0     | 0 / 0        | <input type="checkbox"/> |        | <input type="checkbox"/> |
| <a href="#">CLOSE</a>  | Open   | test                        | 06/21/2017   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 19    | 6 / 13       | <input type="checkbox"/> |        | <input type="checkbox"/> |

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

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



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



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

## Create New Item

\* = Required

### Choose an Item Type

Choose from over 35 question item types, including auto sum matrix, dynamic row, ranking, drop-down lists, open-ended

Choice - One Answer (Option Buttons) ▼

GO

or

Copy from Existing

or

Insert from Library

OPEN TEXT REPLACEMENT TOKEN REFERENCE

Question

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

|          |        |               |              |          |          |          |   |
|----------|--------|---------------|--------------|----------|----------|----------|---|
| File ▼   | Edit ▼ | Insert ▼      | View ▼       | Format ▼ | Table    |          |   |
| ↶        | ↷      | Formats ▼     | <u>A</u> ▼   | A ▼      | <b>B</b> | <i>I</i> | ☰ |
| 🔗        | 🖼️     | Font Family ▼ | Font Sizes ▼ |          |          |          | ☰ |
|          |        |               |              |          |          |          |   |
| Words: 0 |        |               |              |          |          |          |   |

Type  
Question Text  
Here

Words: 0

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 Validation** Required - Validation - Skipped a question.

Not Required ▾

Alias is used in reports instead of question text

Sub text shows under the question text.

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

Validation Options  
**Required Validation** Required - Validation - Skipped a question.

Not Required ▾  
 Not Required  
 Required  
 Warning

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

Select whether an answer is required

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

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

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

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

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

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

**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.

Agree - Disagree go

Enter the answers.\* Enter each of the answers in the text box.

For Icon Question Types Only:

Icon Class (the ex: fa fa-check fa-2x (choose any icons from font awesome))

Icon Color Class (can be a different class for each column so each column can have a different color)

Specify Colors in Survey Template CSS clear

|   |                   |                               |   |        |        |    |             |  |             |  |
|---|-------------------|-------------------------------|---|--------|--------|----|-------------|--|-------------|--|
| 1 | Strongly Agree    | <input type="radio"/> Default | 5 | points | Alias: |    | Icon Class: |  | Icon Color: |  |
| 2 | Agree             | <input type="radio"/> Default | 4 | points | Alias: | A  | Icon Class: |  | Icon Color: |  |
| 3 | Neutral           | <input type="radio"/> Default | 3 | points | Alias: | N  | Icon Class: |  | Icon Color: |  |
| 4 | Disagree          | <input type="radio"/> Default | 2 | points | Alias: | D  | Icon Class: |  | Icon Color: |  |
| 5 | Strongly Disagree | <input type="radio"/> Default | 1 | points | Alias: | SD | Icon Class: |  | Icon Color: |  |

Allow additional answer or file upload

Check this box if you would like an additional "Other" prompt in the text box below.

Other, please specify

Select horizontal or Vertical for answer alignment

Optional Points

Optional Alias for Reports

Type in box or choose from preset answers

## Question Types

The basic question type categories are described below.

### Open Ended Question Types:

Question types that allow the respondent to enter open ended text answers.

### Choice Question Types:

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

### Matrix Question Types:

Question types that contain one or more columns and rows.

### Presentation Question Types:

Question types that display or highlight information to the respondent.

**Database Query Question Types:**

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

**Touch Question Types:**

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

**Random Question Types:**

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

## Choose Question Type

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

Choose from over 42 question item types, including auto sum matr

Choice - True/False GO or Co

- Please Select --
- Choice - Database Checkboxes
- Choice - Database Dropdown
- Choice - Database Options
- Choice - Multiple Answers (Checkboxes)
- Choice - One Answer (Dropdown)
- Choice - One Answer (Option Buttons)
- Choice - One Answer Per Row (Icons)
- Choice - True/False**
- Choice - Yes/No
- Matrix - Dynamic Row
- Matrix - Multiple Answers per Row (Checkboxes)
- Matrix - Multiple Answers per Row (Text/Dropdown)
- Matrix - Multiple Answers per Row (Textboxes)
- Matrix - One Answer Per Row (Icons)
- Matrix - One Answer per Row (Option Buttons)
- Matrix - Rating Scale (Numeric)
- Matrix - Rating Scale Slider (Numeric)
- Open Ended - Calculated
- Open Ended - Captcha

**Enter the question alias.** Enter alternate text for use in the report

- **Choice - Database Checkboxes**

Entering your dynamic database query returns rows for checkbox list.

1. 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

## Question

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

Rich text editor toolbar with options: Bold (B), Italic (I), Underline (U), ABC, Format, Font family, Font size. Icons for Undo, Redo, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, Audio, HTML, Source, Print, Spell Check, 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.

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

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)

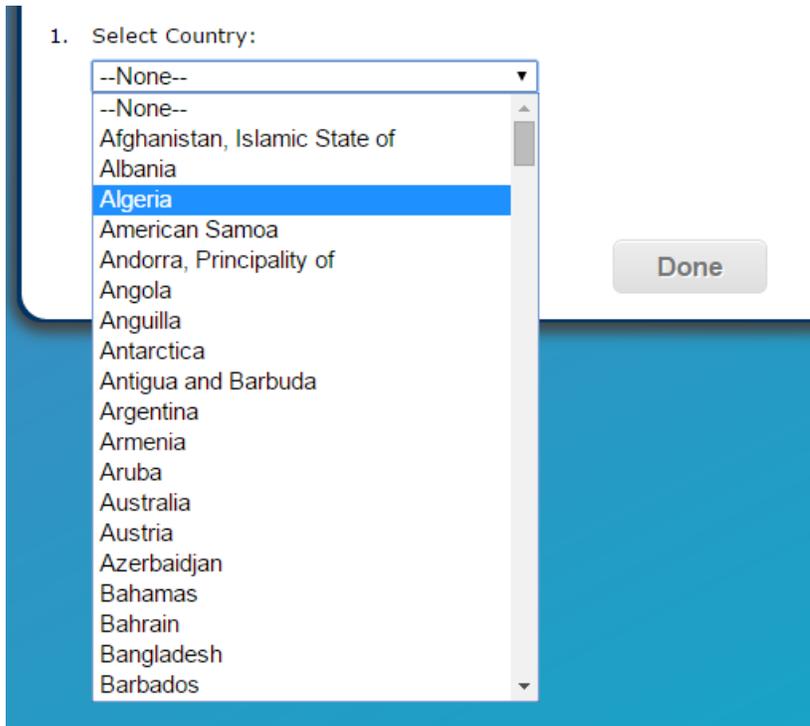
StudioDReader [Add Database DSN Connections](#)

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 value. In most cases this \*ex: SELECT Country AS ItemDisplay, Country AS ItemValue FROM Countries

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.

```
select top 5 title as ItemDisplay, title as ItemValue from sur_survey
```

- *Note: This is only for SQL database lookups, this is covered in the Power User Class.*
- **Choice - Database Dropdown (Populate from DB or Web service)**  
Entering your dynamic database query or web service returns rows for dropdown box.



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 to be displayed below 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

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

- **Choice – Database Options**

Entering your dynamic database query returns rows for radio buttons.

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

- **Choice - Multiple Answers (Checkboxes)**

Respondent can select multiple boxes, and optionally you can display an open ended textbox or comments box, or file upload for the “other” option. Points can be assigned to answer options.

1. Example of Choice - Multiple Answers (Checkboxes) Question Type.  
Please select each College Class that you took in 2013:

- English 1
- English 2
- English 3
- Composition
- Journalism
- Other, please specify

- **Choice - One Answer (Dropdown)**

Respondent can only select one answer. Points can be assigned to answer options.

2. Example of Choice - One Answer (Dropdown) Question Type  
Please select how hard the last semester was for you:

- **Choice - One Answer (Option Buttons) (“Likert Scale”)**

Respondent can only select one answer. Points can be assigned to answer options.

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

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

- **Choice –Icons**

Respondent can only select one answer. Points can be assigned to answer options.

3. Pick your favorite car



- **Choice - True/False**

Respondent can only select one answer. If you need points assigned, use the choice dropdown and enter "true" and "false" as the options instead of this question type.

5. Example of "Choice - True/False" Question Type.

The sky is blue.

Select whether you think this statement is true or false.

6. Example of "Choice - True/False" Question Type.

The sky is blue.

Select whether you think this statement is true or false.

True

False

- **Choice - Yes/No**

Respondent can only select one answer. If you need points assigned, use the choice dropdown and enter "yes" and "no" as the options instead of this question type.

7. Example of "Choice - Yes/No" Question Type.

Is the sky blue?

8. Example of "Choice - Yes/No" Question Type.

Is the sky blue?

Yes  No

- **Matrix - Dynamic Row**

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

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

|          | Address              | Phone                | Office Manager |
|----------|----------------------|----------------------|----------------|
| Office 1 | <input type="text"/> | <input type="text"/> | Mr. Smith ▼    |
| Office 2 | <input type="text"/> | <input type="text"/> | Mr. Smith ▼    |

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

- **Matrix - Multiple Answers per Row (Checkboxes)**

Respondent can select multiple boxes in each row and column. Row text can be dynamically displayed.

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

|      | Strongly Agree           | Agree                    | Neutral                  | Disagree                 | Strongly Disagree        |
|------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Row1 | <input type="checkbox"/> |
| Row2 | <input type="checkbox"/> |
| Row3 | <input type="checkbox"/> |

- **Matrix - Multiple Answers per Row (Text/Dropdown)**

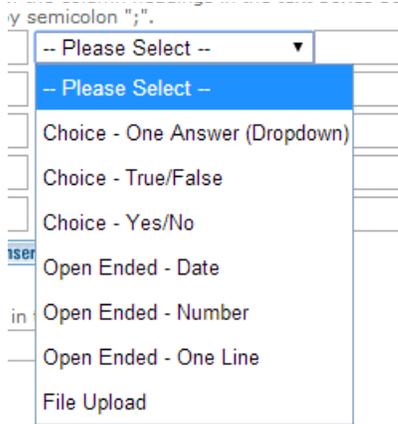
Multiple question types in each column. Row text can be dynamically displayed.

11. Example of "Matrix - Multiple Answers per Row (Text/Dropdown)

This question allows different question types in each column.

|       | Class   | Date   | Semester | Teacher              |
|-------|---------|--------|----------|----------------------|
| Row 1 | Math1 ▼ | MWF1 ▼ | Fall ▼   | <input type="text"/> |
| Row 2 | Math1 ▼ | MWF1 ▼ | Fall ▼   | <input type="text"/> |
| Row 3 | Math1 ▼ | MWF1 ▼ | Fall ▼   | <input type="text"/> |

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



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

**Columns**

Column headings and types. \* Enter each of the column headings in the text boxes below and select column types. Enter dropdown values or min and max text values in 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-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 Enter Column Name -- Please Select -- Alias: Icon Class: Icon Color:

2 Enter Column Name -- Please Select -- Alias: Icon Class: Icon Color:

insert new answer

Column width. Enter the width, in pixels, of the columns (default 300)

Set column width here

- Matrix - Multiple Answers per Row (Textboxes)**

Optional to show row auto totals or column auto totals. Optionally can specify a total value for rows or columns to validate against.

12. Example of "Matrix - Multiple Answers per Row (Textboxes)

|      | Job1 | Job2 | Job3 | Job4 | Job5 |    |
|------|------|------|------|------|------|----|
| Row1 | 5    | 5    | 5    |      |      | 15 |
| Row2 | 5    |      |      |      |      | 5  |
| Row3 | 5    |      |      |      |      | 5  |
|      | 15   | 5    | 5    |      |      |    |

- Matrix - One Answer per Row (Icons)**

Respondent can only select one radio button per row. Rows can be dynamically generated.

- **Matrix - One Answer per Row (Option Buttons)**

Respondent can only select one radio button per row. Rows can be dynamically generated.

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

|      | Strongly Agree        | Agree                 | Neutral               | Disagree              | Strongly Disagree     |
|------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Row1 | <input type="radio"/> |
| Row2 | <input type="radio"/> |
| Row3 | <input type="radio"/> |

- **Matrix - Rating Scale (Numeric)**

Respondent can select only one radio button per row.

14. Example of "Matrix - Rating scale"

|      | 1                     | 2                     | 3                     | 4                     | 5                     |
|------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Row1 | <input type="radio"/> |
| Row2 | <input type="radio"/> |
| Row3 | <input type="radio"/> |

- **Matrix Rating Scale Slider (Numeric)**

Respondent can slide select one number value per row.

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)

|                       | 1 | 2 | 3 | 4 | 5 |                        |
|-----------------------|---|---|---|---|---|------------------------|
| School Lunches Bad    |   |   |   |   |   | School Lunches Good    |
| School Staff Bad      |   |   |   |   |   | School Staff Good      |
| School Facilities Bad |   |   |   |   |   | School Facilities Good |

- **Open Ended – Calculated**

This question displays a dynamically calculated number calculated from piping tokens or formula that you type in, and displays it to the respondent.

7. Your body mass index is:

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

- **Open Ended – Captcha**



16. Open Ended - Constant Sum

Row1

Row2

Row3

- **Open Ended – Date**

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

5. Please enter the date of the training:

9/1/2014  mm/dd/yyyy

- **Open Ended – Number**

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

6. Example of "Open Ended - Number" Question Type.

\$

- **Open Ended - Number Slider**

Specify minimum and maximum number for the slider range and default value.

17. Example of Open Ended - Number Slider



- **Open Ended - One Line**

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

18. Open Ended One line

- **Open Ended - One or More Lines**

Respondent can enter 255 characters per line. For longer text, use the comments box question type.

19. Open Ended One or more Lines

Row1

Row2

Row3

- **Open Ended – Ranking**

Specify the starting and ending ranking numbers that the respondent must rank with.

20. Open Ended Ranking

Rank the items below, using numeric values starting with 1.

Row1

Row2

Row3

- **Predefined - User Registration**

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

21. Predefined User Registration

**User Account Information**

|                              |  |
|------------------------------|--|
| <b>User Name</b>             | <input type="text" value="admin"/>                   |
| <b>Password*</b>             | <input type="text"/>                                 |
| <b>Reenter Password*</b>     | <input type="text"/>                                 |
| <b>Title</b>                 | <input type="text"/>                                 |
| <b>First Name</b>            | <input type="text" value="Joe"/>                     |
| <b>Last Name</b>             | <input type="text" value="User"/>                    |
| <b>Email Address</b>         | <input type="text" value="JoeUser@YourCompany.com"/> |
| <b>Reenter Email Address</b> | <input type="text" value="JoeUser@YourCompany.com"/> |

**Other User Account Information**

- **Presentation – Heading**

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

## Section 1: Work History

- **Presentation - Horizontal Rule (HR)**

The horizontal rule is a thin line that goes across the page of the survey separating the questions.

The presentation message is for normal sized text to determined by the Survey Template that you have ch



## Section 1: Work History

- **Presentation – HTML**

This question type allows you to paste in any html to display to the respondent. For example, you can paste in PayPal donate button, purchasing buttons/links, maps for directions, youtube videos, dynamic content from other web sites, links to document downloads, videos, or music.

To add HTML, click the blue “HTML” button in the rich text box to open the html editor.

### HTML

[OPEN COMPLETE TOKEN REFERENCE FOR THIS SURVEY IN A NEW WINDOW](#)

Use the tokens from the above link in your HTML for text replacement.

Enter the HTML.\* Use this field to enter any HTML and/or content. Text will be displayed using the HTML tags you enter.



- **Presentation - Image or Video**

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

Presentation - Image or Video  or

Spell Check Question Text

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

### Upload Image

Choose File No file chosen

Upload

### File Size:

#### Enter the Image Path

Enter the path to the image.\* Use a full HTTP path, a relative path, c  
Default upload location is "UploadedImages" so the path would be lil

#### Enter the 508 compliant Image ALT Text

Enter the ALT text for the image for 508 compliance. \* Enter the tex

### Options

Image/Video Type

Image height. To change the height of the image, enter a value belc

Image width. To change the width of the image, enter a value below

Image alignment. Select the horizontal alignment for how the image



- **Presentation – Message**

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



The presentation message is for normal sized text to display inline with the survey. The style of this text is determined by the Survey Template that you have chosen for the survey.

- **Presentation - Sound (Full)**

This has all of the sound controls to replay the sound file.



- **Presentation - Sound (One Time)**

This only plays the sound one time and hides all of the other controls.



- **Random Image**

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

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

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

- **Random Message – Single Choice Options**

Random message is displayed to respondent from a group of messages that are defined by the survey administrator.

When building a survey, “Random Message; One Answer (Option Buttons)” is now a question type

- When selected, this question type functions similarly to the previous custom question, but now utilizing the “Random Message Group” defined earlier

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

You can upload a group of text messages that will randomly be shown on the survey.

To manage the "groups" of random images, you can click the manage groups link after inserting the question type, or, go to admin tools > manage random groups With messages you import from excel file.

Each time this question type is used within a survey on a different page, different random messages (answer choices) will be shown

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

- **Respondent File Upload**

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

3. Please upload your resume.\*  
**Select file to upload:**  
(click "Browse" button below to locate file)

File size restricted to: 4000 KB  
File type restricted to: DOC,DOCX,PDF

No file chosen

File Name: (limit 255 characters)

File Description: (limit 255 characters)

Files Uploaded:

There are two display modes:

- Show "File Name" and "File Description" text boxes
- Hide "File Name" and "File Description" text boxes.

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

Options

**Accepted File Types**

Not Required. No File Type Restrictions. Respondent can skip this question without uploading a file.  
 Required. Restrict File Type to below checked file types. A file must be uploaded by respondent.

.AVI  .DOC  .DOCX  .DWG  .DXF  .GIF  .JPG  .MP3  .MPEG  
 .MOV  .PDF  .PNG  .SWF  .WAV  .WMA  .WMV  .XLS  .XLSX  
 .ZIP

**Accepted file size limit**  
 KB

**File Storage Location**

**Show File Name and File Description Text Boxes for Respondent**

**WARNING! This survey has responses.** To save the responses to this question and only edit the question text, keep this box checked. To remove responses to this item, un-check this box.

Save responses to this item. Check this box to save responses to this item.

Show in Take Review Survey

Select "Yes" to show the file name and file description text boxes, and "No" to hide them.

The question with the textboxes hidden looks like so:

**test** Page 1 of 2

---

1. test

**Select file to upload:**  
(click "Browse" button below to locate file)

File size restricted to: 400 KB  
 File type restricted to: No file type restrictions.

Upload Successful for: TakeAGuidedTour.gif

The question with the textboxes shown looks like so:

**test** Page 2 of 2

---

2. test with filename

**Select file to upload:**  
(click "Browse" button below to locate file)

File size restricted to: 4000 KB  
 File type restricted to: No file type restrictions.

File Name: (limit 255 characters)

File Description: (limit 255 characters)

Files Uploaded:

- **TOUCH - Clickable Image Maps**

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

### Define Image Maps

Add a image map to the selected image by selecting the Rectangle or C shape image maps. The Custom Shape button is used for circles, triang

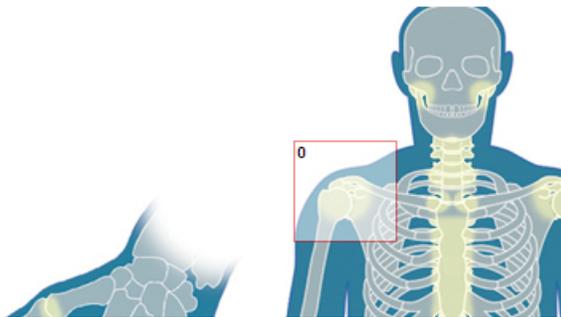
You can edit a custom map by clicking on one of the plotted points or a

Each time you add an image map, you can define the text label descrip the hotspot, to be used in the text only export and reports as the respo edit them in the textbox below and remember to click save.

 Zoom:  Output:  Fill:Outl

|                                  |           |  |   |                                     |
|----------------------------------|-----------|--|---|-------------------------------------|
| <input type="radio"/>            | rectangle | Coords: <input type="text" value="238,138,301,2"/> | Href: <input type="text" value="javascript:void(0)"/> | Alt: <input type="text" value="0"/> |
| <input checked="" type="radio"/> | rectangle | Coords: <input type="text"/>                       | Href: <input type="text" value="javascript:void(0)"/> | Alt: <input type="text" value="1"/> |

CLICK ON IMAGE FOR FIRST POINT, THEN MOVE MOUSE TO DEFINE IM  
**Ready**



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



Left Shoulder,|

- **TOUCH - Number Slider**

The number slider shows in html 5 if an iphone, kiosk, ipad or touchscreen is being used.

2. Touch number slider.



- **TOUCH – Single Choice Buttons**

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

[No Title Entered]

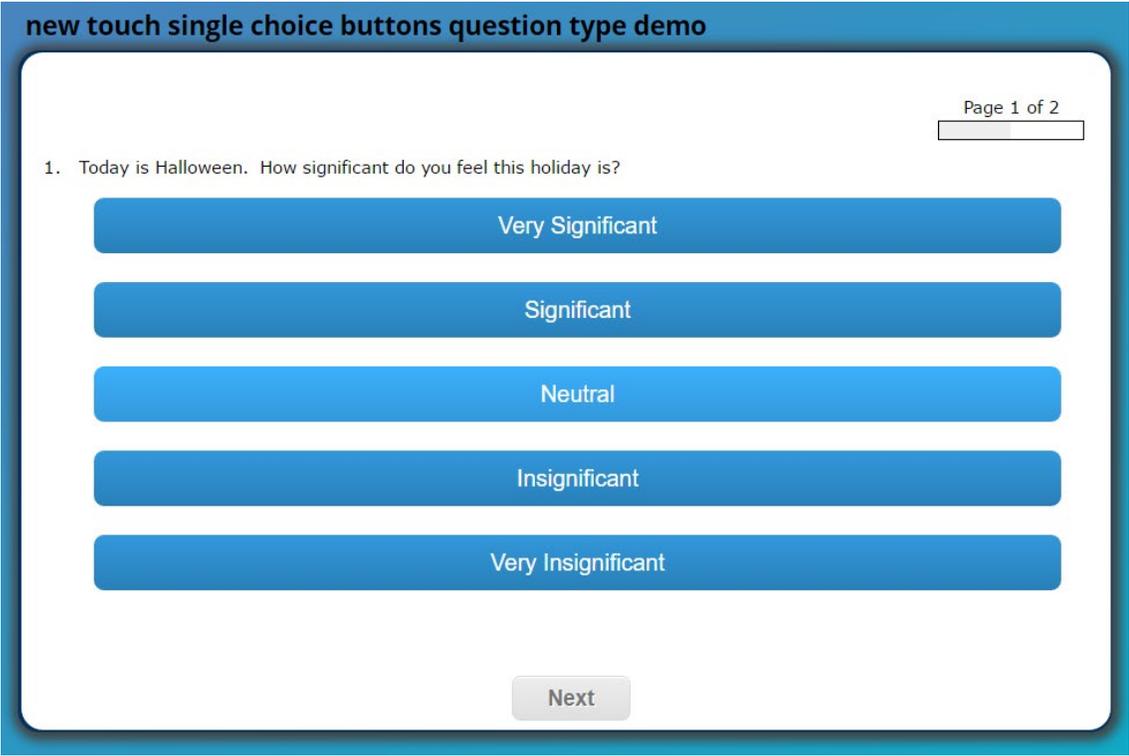
- edit page properties
- insert page condition
- copy page
- delete page

1. Today is Halloween. How significant do you feel this holiday is?

- Very Significant
- Significant
- Neutral
- Insignificant
- Very Insignificant

- insert
- insert cond.
- hide cond.
- edit
- delete
- copy
- move
- pipe

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



# Modify Survey

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

The screenshot shows the 'Modify Survey' interface for a survey titled 'Test Survey'. At the top, there is a status message: 'Modify Survey' followed by 'This survey is currently LOCKED for editing by Joe User. It will become available after they unlock it or after 30 minutes has passed with no activity. Click here to unlock and exit the survey'. Below this, there are navigation tabs for 'Page 1' (selected) and 'All Pages'. On the right side, there are three buttons: 'CLOSE', 'PREVIEW', and 'SURVEY SETTINGS'. The main content area displays the survey title 'Test Survey' with an 'Options' button. Below the title, there is a note: 'Click on the "New Pg" button to add a new item on a new first page.' The survey content shows '[No Title Entered]' followed by a question: '1. What version of Excel are you using?'. There are two radio button options: 'Excel 2003' (selected) and 'Excel 2007'. A yellow callout bubble labeled 'Edit Page' points to a dark blue 'Edit Page' button with a pencil icon. A dropdown menu is open from this button, listing 'Add Page Conditions', 'Copy Page', and 'Delete Page'. To the right of the question, there is a 'New Page' button and an 'Edit Item' button with a pencil icon.

## Insert a New Question on a New Page

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

The screenshot shows a survey editor interface. At the top, there is a title "Test Survey" and a button labeled "Options". Below the title, there is a text instruction: "Click on the 'New Pg' button to add a new item on a new first page." and a button labeled "New Page". The main content area shows a question titled "[No Title Entered]" with a sub-question "1. What version of Excel are you using?". There are two radio button options: "Excel 2003" and "Excel 2007". Above the question, there is a button labeled "Edit Page". To the right of the question, there is a button labeled "Edit Item" which has a dropdown menu open. The dropdown menu contains the following options: "Insert Item Above", "Insert Question Condition", "Insert Hide Condition", "Edit Item", "Delete Item", "Copy Item", "Move Item", and "Pipe Item". A yellow callout bubble points to the "Edit Item" button and is labeled "Item actions menu".

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

## Add Page Conditions

**Before you begin...remember this:**

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

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

**Examples:**

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

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

### Existing Page Conditions

Page conditions in the same group are evaluated together with an AND operator. Each group is evaluated with other groups using an OR operator. To evaluate all page conditions, use a single group number.

“SKIP TO PAGE” conditions will over-ride “NO SKIP” page conditions, so with that in mind, they should be separated on different pages.

**“NO SKIP” page will SHOW the page if the condition is TRUE and HIDE the page if the condition is FALSE.**

Loop conditions are automatically created when you select a page condition that skips to a page prior to the current page. This will cause the flow of the survey to go backwards to the skipped page then forwards again repeatedly until the loop condition is not met anymore.

| Edit                                | Page | Group | Question or Token | Operator | Answer | Row | Condition | Skip To Page | Skip To End | Loop Page | Delete                                |
|-------------------------------------|------|-------|-------------------|----------|--------|-----|-----------|--------------|-------------|-----------|---------------------------------------|
| <input type="button" value="edit"/> | 2    | 1     | test              | =        |        |     | True      | show page    | N           | N         | <input type="button" value="delete"/> |

### Insert a Page Condition

Create a page condition by selecting a question from a prior page, and then specifying the operator and answer in the form below. Note that the Provided and Did Not Provide operators do not require an answer.

Create Condition based on Question Answer OR Token

Token:

OR

Question:

Operator:\*

Answer:\*

Row: (matrix only)

Group:

Skip to:

Note: Skip to End of survey means it skips to the completion page of the survey, so that completion logic can execute.

Select question or token to trigger logic

Click Save

## Email Trigger Page Conditions

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

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

test

 Options

[No Title Entered]

↓4. tf

--None-- ▾

 Edit Page ▾

Edit Page Properties

Add Page Conditions

**View Email Triggers**

Remove Page Break

Copy Page

Move Page

Delete Page

↑5. test

- ↓
- Strongly Agree
  - Agree
  - Neutral
  - Disagree
  - Strongly Disagree

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

## Edit Existing Email Trigger Condition

 = Required

### Edit Email Trigger Condition

Edit the existing Email Trigger condition by selecting a question from a prior page, and then specifying the operator and answer in the form below.

Create Email Trigger Condition based on Question Answer OR Token

Token: Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey)

Token:

OR

Question:

Operator:\*

Answer:\*

Row: (matrix only)

Group:

From Email:\*

From Name:

To Email:\*

CC Email:

BCC Email:

Email Subject:

Email Message:

Email Description:

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

## Email Trigger Conditions

 = Required

### Existing Email Trigger Conditions

Email Triggers are page conditions that you set where certain answer items will trigger an email to be sent to the recipients that you specify.

| Edit                                | Page | Email Subject      | Group | Question or Token | Operator | Answer | Row | Condition | Delete                                |
|-------------------------------------|------|--------------------|-------|-------------------|----------|--------|-----|-----------|---------------------------------------|
| <input type="button" value="edit"/> | 2    | Test email trigger | 1     | test              | =        |        |     | True      | <input type="button" value="delete"/> |

### Insert an Email Trigger Condition

Create an email trigger condition by selecting a question from a prior page, and then specifying the operator and answer in the form below. Note that the Provided and Did Not Provide operators do not require an answer.

Create Email Trigger Condition based on Question Answer OR 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)

Token:    
OR  
Question:

Operator:\*    
Answer:\*   
Row: (matrix only)    
Group:

From Email:\*   
From Name:   
To Email:\*   
CC Email:   
BCC Email:   
Email Subject:

## Question Conditions

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

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

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

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

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

# Question Conditions

Please select the choice(s) that will trigger the conditional questions.

What version of Excel are you using?

## Trigger conditions on

Excel 2003

Excel 2007

Update Trigger

## Conditional Question(s)

Enter the text of the conditional question and then select "Save".

Why are you still using Excel 2007?

Enter the width for the text box (Example values: 100px or 100%)

300px

Click "Save"

Save

That's it.

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

## Conditional Question(s)

Enter the text of the conditional question and then select "Save".

Enter the width for the text box (Example values: 100px or 100%)

300px

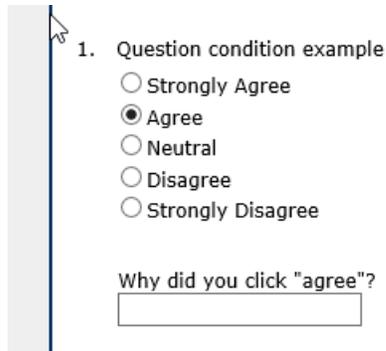
Save

Why are you still using Excel 2007?

Delete

Back

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

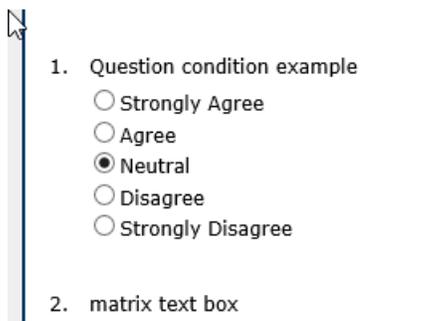


1. Question condition example

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

Why did you click "agree"?

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



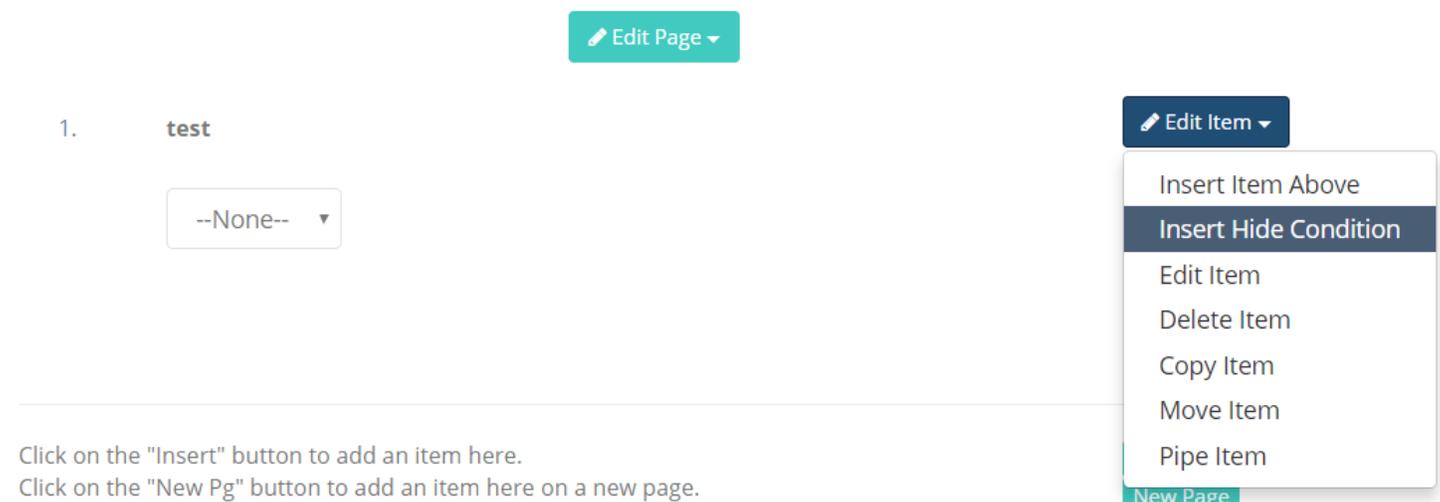
1. Question condition example

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly Disagree

2. matrix text box

## Hide/Show on Same Page Question Conditions

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



1. test

--None-- ▾

Edit Page ▾

Edit Item ▾

- Insert Item Above
- Insert Hide Condition**
- Edit Item
- Delete Item
- Copy Item
- Move Item
- Pipe Item

New Page

Click on the "Insert" button to add an item here.  
Click on the "New Pg" button to add an item here on a new page.

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

## Add Hide Condition

If condition is met, question will SHOW. If condition is not met, question will HIDE.

Question hide conditions in the same group are evaluated together with an AND operator.

Each group is evaluated with other groups using an OR operator. To evaluate all hide question hide conditions, use a single group number.

| Edit | HideItemID | Group | Question or Token | Operator | Answer | Row | Condition | Delete |
|------|------------|-------|-------------------|----------|--------|-----|-----------|--------|
|------|------------|-------|-------------------|----------|--------|-----|-----------|--------|

## Insert a Question Hide Condition

Create a question hide condition by selecting a question from prior in the survey, and then specifying the operator and answer in the form below. Note that the Provided and Did Not Provide operators do not require an answer.

### Create Question Hide Condition based on Question Answer OR Token

Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens do not have points in your survey)

Token:

No Token

OR

Question:

-- No Available Questions --

Note: Keep in mind that only questions prior to this question should trigger a following question

Operator:\*

Equal To

Answer:\*

Row: (matrix only)

Group:

Group1

Select Logic

Click "Save"

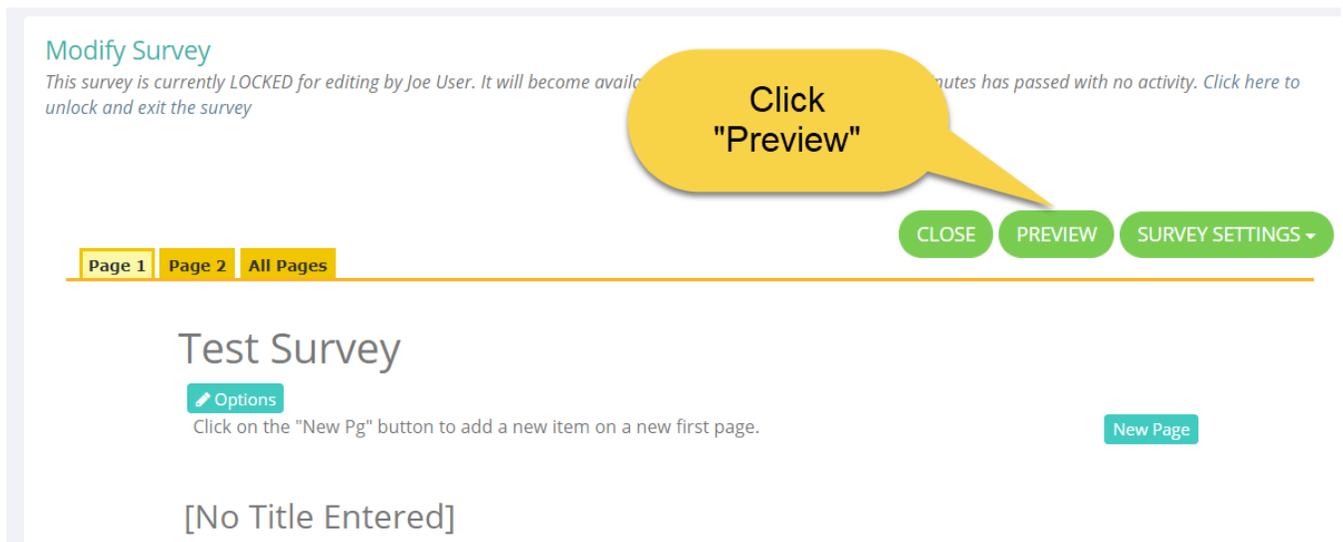
Done

Save

## Preview Your Survey

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

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



The screenshot shows a survey editing interface. At the top left, there is a link for "Modify Survey" and a status message: "This survey is currently LOCKED for editing by Joe User. It will become available again in 15 minutes has passed with no activity. Click here to unlock and exit the survey". Below this is a navigation bar with three tabs: "Page 1", "Page 2", and "All Pages". To the right of the tabs are three buttons: "CLOSE", "PREVIEW", and "SURVEY SETTINGS" with a dropdown arrow. A yellow callout bubble points to the "PREVIEW" button with the text "Click 'Preview'". Below the navigation bar, the main content area is titled "Test Survey" and includes an "Options" button. Below the title, there is a "New Page" button and the text "[No Title Entered]".

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

## Active Surveys

Set Default Folder on User Preference Page

--All Surveys-- Search title and owner fields..

Click Title to Preview

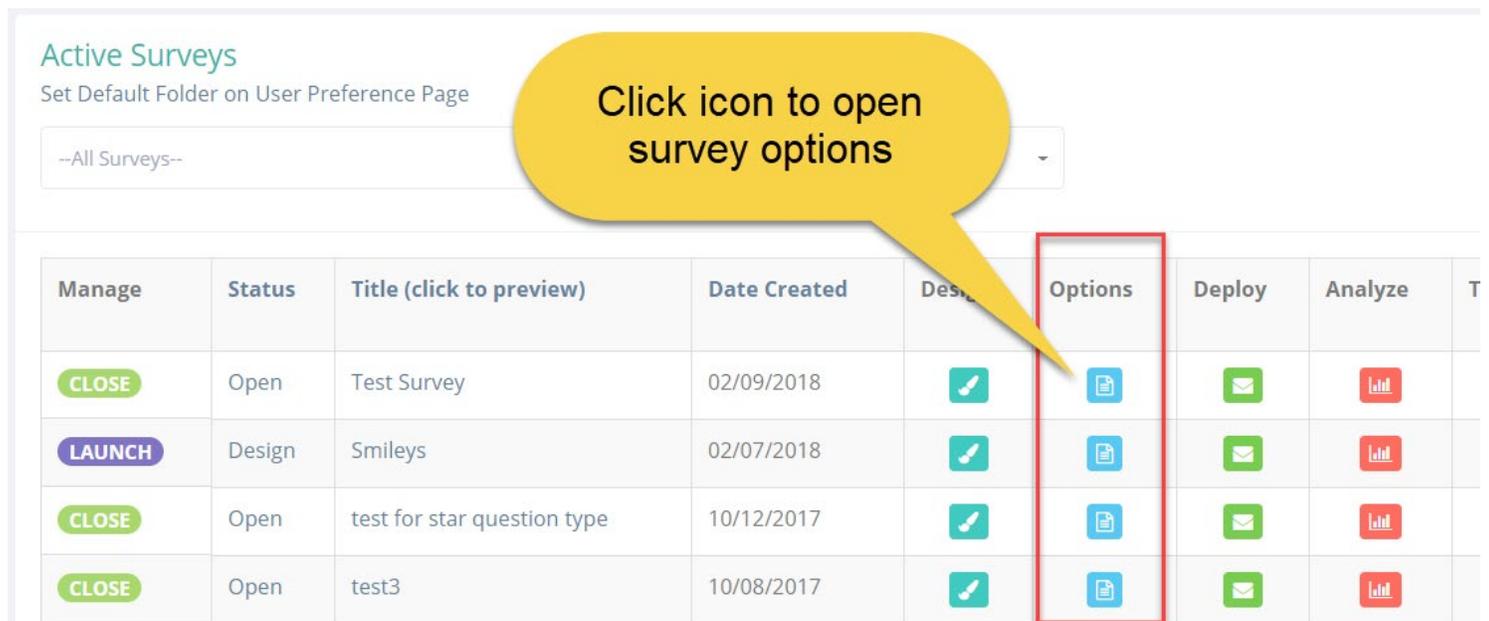
| Manage                 | Status | Title (click to preview)    | Date Created | Design | Options | Deploy | Analyze | Total | Comp/Incomp. | Archive | Delete | Clear |
|------------------------|--------|-----------------------------|--------------|--------|---------|--------|---------|-------|--------------|---------|--------|-------|
| <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        |         |        |       |
| <a href="#">CLOSE</a>  | Open   | test3                       | 10/08/2017   |        |         |        |         | 1     | 0 / 1        |         |        |       |
| <a href="#">CLOSE</a>  | Open   | test2                       | 10/08/2017   |        |         |        |         | 0     | 0 / 0        |         |        |       |
| <a href="#">CLOSE</a>  | Open   | test                        | 06/21/2017   |        |         |        |         | 19    | 6 / 13       |         |        |       |

## Set Survey Options

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

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

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



Active Surveys  
Set Default Folder on User Preference Page

--All Surveys--

| Manage        | Status | Title (click to preview)    | Date Created | Design | Options | Deploy | Analyze | T |
|---------------|--------|-----------------------------|--------------|--------|---------|--------|---------|---|
| <b>CLOSE</b>  | Open   | Test Survey                 | 02/09/2018   |        |         |        |         |   |
| <b>LAUNCH</b> | Design | Smileys                     | 02/07/2018   |        |         |        |         |   |
| <b>CLOSE</b>  | Open   | test for star question type | 10/12/2017   |        |         |        |         |   |
| <b>CLOSE</b>  | Open   | test3                       | 10/08/2017   |        |         |        |         |   |

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

### General Tab:

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

### Display Tab:

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

**Access Tab:**

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

**Completion Tab:**

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

**ActiveLogic Tab:**

- Configure ActiveLogic completion workflow

**Report Tab:**

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

**Advanced Tab:**

- Hidden Fields
- Dynamic Tokens
- Survey Review

**Validation Tab:**

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

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

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

## 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 | Validation |
|---------------------------|---|--------|------------|-------------|--------|----------|------------|
| <b>Title*</b>             | <input type="text" value="Test Survey"/>  |        |            |             |        |          |            |
| <b>Status</b>             | <input type="text" value="Open"/>   |        |            |             |        |          |            |
|                           | <p>Status Definitions:<br/><b>Master:</b> Only admins can edit, owners can create surveys from the master survey.<br/><b>Design:</b> Survey cannot be previewed or taken because it has not been launched.<br/><b>Open:</b> Survey is open and it can be previewed and deployed.<br/><b>Closed:</b> Survey is closed it cannot be previewed or responded to.<br/><b>Archived:</b> Survey is archived, cannot delete until unarchived.</p> |        |            |             |        |          |            |
| <b>Language</b>           | <input type="text" value="English (Standard)"/> <input type="button" value="Translate Survey"/>   |        |            |             |        |          |            |
| <b>Owners*</b>            | <p>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.</p> <input type="text" value="admin;"/> <input type="button" value="Search"/> <input type="button" value="Add"/>   |        |            |             |        |          |            |
| <b>User Group Owners:</b> | <p>Enter the User Group names who are owners of this survey. Separate each name with a semi-colon.</p> <input type="text" value=";"/> <input type="button" value="Search"/> <input type="button" value="Group B"/> <input type="button" value="Add"/>   |        |            |             |        |          |            |

You can translate all survey text with one click.

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

## Survey Options

Survey Options

'Test Survey' Survey

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

Click Tabs to see other options

| General       | Display                                  | Access | Completion | ActiveLogic | Report | Advanced | Validation | API |
|---------------|--|--------|------------|-------------|--------|----------|------------|-----|
| <b>Title*</b> | <input type="text" value="Test Survey"/> |        |            |             |        |          |            |     |
| <b>Status</b> | <input type="text" value="Open"/>        |        |            |             |        |          |            |     |
|               | <p>Status Definitions:</p>               |        |            |             |        |          |            |     |

## Deploy Your Survey

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

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

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

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

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

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

### Deploy Survey

This page supplies the URLs for deploying your surveys.

[Click to Review and Approve Survey Design](#)

#### Send Survey Invitations by Email

**Deploy 'Test Survey' Survey**

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](#)

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.

**External URL (Default Internet)**

**Internal URL (Intranet) (Set in Admin Tools)**

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

**Web Page Link**

To embed a link to your survey in a web page, copy the link below and paste it into your web page in the desired location. You can change the name of the link in the text below.

## Deploy Tiny URLs

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

## URL REWRITER

Create a clean short URL.

Example:

`http://localhost/SelectSurvey/ClientName`

instead of:

`http://localhost/SelectSurvey/TakeSurvey.aspx?SurveyID=123`

Existing Custom URLs for this Survey:

| Route Name | Route URL | Route Physical File | Route Survey ID | Delete |
|------------|-----------|---------------------|-----------------|--------|
|------------|-----------|---------------------|-----------------|--------|

You do not currently have any URL routes.

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

`http://localhost/SelectSurvey/ClientName`

`http://localhost/SelectSurvey/`

Add URL Route

## Monitor the Responses

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

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

Active Surveys  
Set Default Folder on User Preference

--All Surveys--

Search title and owner file GO

| Manage | Status | Title (click to preview) | Date Created | Design | Options | Dep. | Analyze | Total | Comp/ Incomp. | Archive | Delete | Clear |
|--------|--------|--------------------------|--------------|--------|---------|------|---------|-------|---------------|---------|--------|-------|
| CLOSE  | Open   | Test Survey              | 02/09/2018   |        |         |      |         | 0     | 0 / 0         |         |        |       |
| LAUNCH | Design | Smileys                  | 02/07/2018   |        |         |      |         | 0     | 0 / 0         |         |        |       |

Click Analyze to see Reports menu

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

| Manage | Status | Title (click to preview) | Date Created | Design | Options | Dep. | Analyze | Total | Comp/ Incomp. | Archive | Delete | Clear |
|--------|--------|--------------------------|--------------|--------|---------|------|---------|-------|---------------|---------|--------|-------|
| LAUNCH | Design | Smileys                  | 02/07/2018   |        |         |      |         | 0     | 0 / 0         |         |        |       |
| CLOSE  | Open   | test                     | 06/20/2017   |        |         |      |         | 13    | 0 / 13        |         |        |       |
| CLOSE  | Open   | test for star            | 10/12/2017   |        |         |      |         | 1     | 0 / 1         |         |        |       |

Warning - clicking "Clear" will permanently delete all responses.

## Reports

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

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

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

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

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

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

## Analyze

This page links to all reports for analyzing data for this survey.

---

Reports for This Survey:

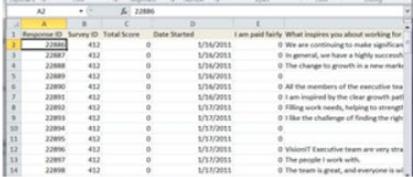
### Results Overview Report

| Response ID  | Response Total | Response Percent | Points      | Avg |
|--|----------------|------------------|-------------|-----|
| 1  | 1              | 100%             | 2           | 2   |
| 2  | 0              | 0%               | 0           | 0   |
| 3  | 0              | 0%               | 0           | 0   |
| 4  | 0              | 0%               | 0           | 0   |
| 5  | 0              | 0%               | 0           | 0   |
| 6  | 0              | 0%               | 0           | 0   |
| 7  | 0              | 0%               | 0           | 0   |
| 8  | 0              | 0%               | 0           | 0   |
| 9  | 0              | 0%               | 0           | 0   |
| 10   | 0              | 0%               | 0           | 0   |
| 11   | 0              | 0%               | 0           | 0   |
| 12   | 0              | 0%               | 0           | 0   |
| 13   | 0              | 0%               | 0           | 0   |
| 14   | 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>2</b>         |             |     |
| <b>Init Average (TotalPoints/UniqueRespondentCount-SkippedTotal)</b> |                | <b>2</b>         |             |     |
| <b>Point Weighted Average (TotalPoints/ResponseCount)</b>            |                | <b>2</b>         |             |     |

Real Time Results Overview of all responses for this survey.

[Results Overview](#)

### Data Export to CSV, XML



Export your data instantly into tabulated format.

[Export Data](#)

### Individual Results

**User Information**

|   |                            |
|---|----------------------------|
| <b>User ID:</b> 1   | <b>Response ID:</b> 172    |
| <b>Names:</b> Joe User  | <b>Email:</b> JoeUser@     |
| <b>Location:</b> Anywhere, USA  | <b>Company:</b> Your Cor   |
| <b>Position:</b> Your Position  | <b>IP Address:</b> ::1     |
| <b>Started:</b> 12/02/2012 5:18 PM  | <b>Completed:</b> 12/02/20 |
| <b>Time Spent:</b> 0 days, 0 hours, 0 minutes, 6 seconds, 6000 milliseconds | <b>Custom 1:</b>           |

### Approve/Review Response Edit History

| v/Edt | First Name | Last Name | Completed | View Only                | Review/Tr                |
|-------|------------|-----------|-----------|--------------------------|--------------------------|
| Y     | Joe        | User      | Y         | <input type="checkbox"/> | <input type="checkbox"/> |
| Y     | Joe        | User      | Y         | <input type="checkbox"/> | <input type="checkbox"/> |
| Y     | Joe        | User      | Y         | <input type="checkbox"/> | <input type="checkbox"/> |

## Results Overview

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

## MA's survey

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

1. Which of the following cuisines do you prefer?

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

2. Please rate the following

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

## Print Reports

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

## Export Data

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

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

## Export Data

### Export Data for Survey 'validation focus'

This page exports data in CSV (Excel) or XML format for the selected survey. Standard question and answer data is always exported for each report. To export, first select an export format. Next, select a data format. Then, optionally, select additional fields of response and/or user data.

#### Export Encoding

Western European (Windows)

#### Multi-Answer Delimiter

SEMICOLON (;)

Only applies to multiple answers inside one column. (User Responses Only) Example:  
"1 = Below Average;2 = Average;3 = Above Average"  
"1 = Below Average,2 = Average,3 = Above Average"

#### Report Filters

Manage Filters

0 filters

Active Report Filters: None Active.

#### Export Format

- CSV (Excel)**- Export data to CSV (Excel) Format. This allows for easy opening and editing using Microsoft Excel.
- XML**- Export data to XML. This format is commonly used by data reporting applications such as Crystal Xcelcius.
- TXT**- Export TEXT ANSWERS ONLY (open ended comments box only) to text format, with one text answer per row ordered by question order, with no other information (all other options will be ignored). This format is for copying text comments into a word doc report.

#### Data Format

- User Responses**- Export each user's response as a row, with one column per question.
  - Show [No Answer Entered] instead of blank. (User Responses only)
- Individual Responses**- Export each answer as a row, with multiple rows for multiselect questions.
- SPSS Format Extended**- Export each response as row, one column per possible answer to each question.
- SPSS Format Condensed**- Condensed single option answers, selected options as '1' or '0'.

Note: The question "alias" (if one is assigned) will export as the column/question identifier.  
Note: Remove empty responses if desired, in admin tools using "database validation tool".  
Note: If respondent closes browser without answering any questions the empty response is counted in "total count".

Select Response  
Details for Export

#### Response Data Export Options

- |   |   |  |   |
|---|---|--|---|
| <input type="checkbox"/> Username       | <input type="checkbox"/> IP Address     | <input checked="" type="checkbox"/> Date Started | <input type="checkbox"/> Time Started                   |
| <input type="checkbox"/> Date Completed | <input type="checkbox"/> Time Completed | <input type="checkbox"/> Completion Status       | <input checked="" type="checkbox"/> Question Conditions |

Score Survey Results  
with Assigned Points

#### Scores For Assigned Points

- Add Sum Total Column of Points per Response (all exports except Individual Responses)
- Export Assigned Point Values Instead of Text Answers (all exports except Individual Responses)

Select User Data for Export

#### User Data Export Options

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> First Name      | <input type="checkbox"/> Last Name        | <input type="checkbox"/> Email Address    |
| <input type="checkbox"/> Company         | <input type="checkbox"/> Current Position | <input type="checkbox"/> Location         |
| <input type="checkbox"/> Custom Data 1   | <input type="checkbox"/> Custom Data 2    | <input type="checkbox"/> Custom Data 3    |
| <input type="checkbox"/> Custom Data 4   | <input type="checkbox"/> Custom Data 5    | <input type="checkbox"/> Custom Data 6    |
| <input type="checkbox"/> Custom Data 7   | <input type="checkbox"/> Custom Data 8    | <input type="checkbox"/> Custom Data 9    |
| <input type="checkbox"/> Custom Data 10  | <input type="checkbox"/> Title            | <input type="checkbox"/> Company Head     |
| <input type="checkbox"/> Department      | <input type="checkbox"/> Address 1        | <input type="checkbox"/> Address 2        |
| <input type="checkbox"/> Postal/Zip Code | <input type="checkbox"/> City/Province    | <input type="checkbox"/> State            |
| <input type="checkbox"/> Country         | <input type="checkbox"/> Business Phone 1 | <input type="checkbox"/> Business Phone 2 |
| <input type="checkbox"/> Fax             | <input type="checkbox"/> Mobile Phone     |   |

Select Email Items for  
Export

#### Email List Data Export Options

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Email First Name | <input type="checkbox"/> Email Last Name | <input type="checkbox"/> Email List Address |
| <input type="checkbox"/> Custom Data 1    | <input type="checkbox"/> Custom Data 2   | <input type="checkbox"/> Custom Data 3      |
| <input type="checkbox"/> Custom Data 4    | <input type="checkbox"/> Custom Data 5   | <input type="checkbox"/> Custom Data 6      |
| <input type="checkbox"/> Custom Data 7    | <input type="checkbox"/> Custom Data 8   | <input type="checkbox"/> Custom Data 9      |
| <input type="checkbox"/> Custom Data 10   |  |   |

Select Hidden Fields for Export

#### Hidden Field Data Export Options

- Include all hidden fields in the exported data
- Include unique Response ID
- Include Survey ID

Select Question Items for  
Export

#### Question Item Data Export Options

- All Question Items
- (Page 1) q1
- (Page 1) q2
- (Page 1) set page condition random order

Cancel

Export

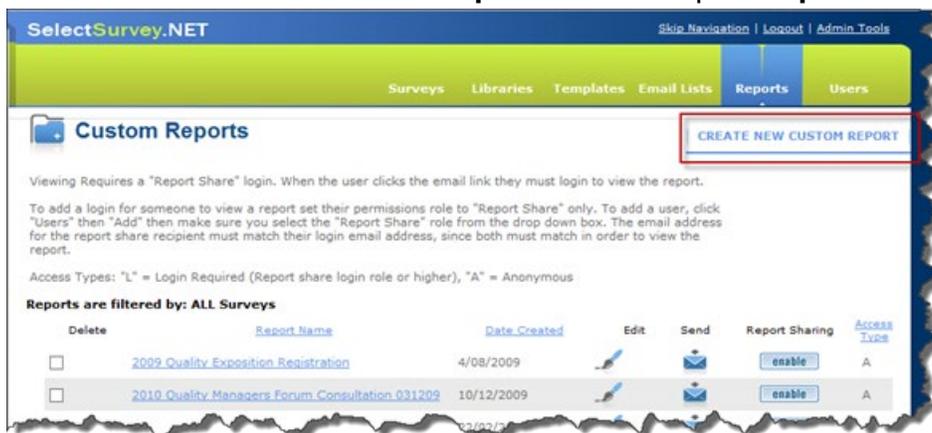
## Custom Reports

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

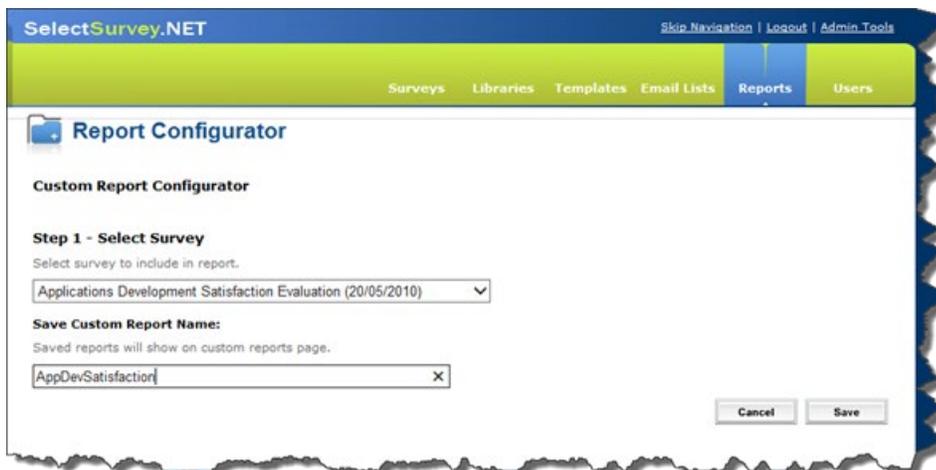
Custom reports also have html and PDF view/print options (2.0 .net framework or greater). You can save and edit custom report configurations and share the results with others. If you intend to share the results with others you must enable this feature first and then create a report share list.

### Step 1 – Create the report

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



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

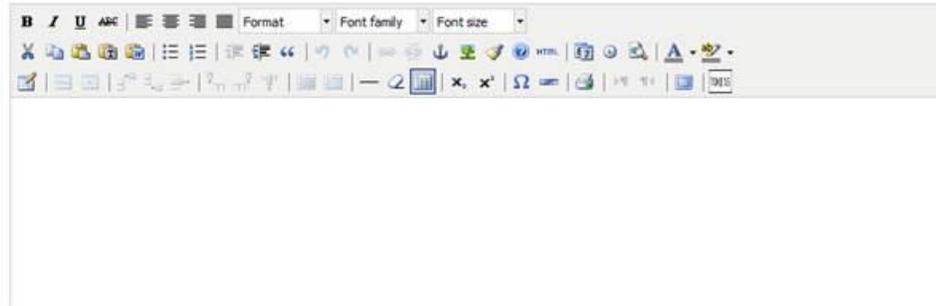


5. Select ALL options from Custom Report Configurator for selected report
  - Access Type
  - Anonymous or Login

|   |
|---|
| Anonymous                                     |
| Login Required (Report Share Login or higher) |

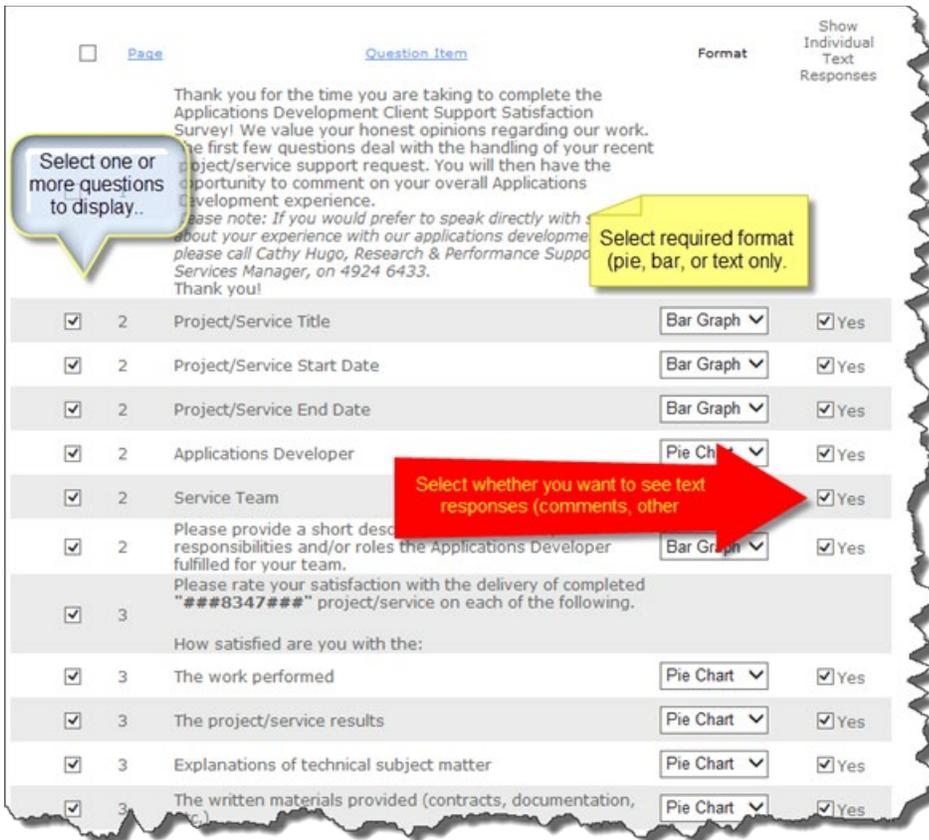
6. Add report Introduction (your own text which will appear above the other data)

Use the below to enter your own text which will appear above the other data, click the "T" button in the menu for available text replacement tokens.



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

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



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

### *Step 3 - Select report properties*

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

**Step 3 - Select report properties**

Select the report properties to display in the report:

**Point Display for Matrix:**  
 Hide Matrix Columns for Points, Point Average, Hide Matrix Row for Point We Answer text (will still display row for Point Average)  
 Hide Point Columns/Rows

**Survey Properties:**  
 Total Respondents       Launched Date  
 Status       Display Hidden Fields       Launch Date

**Response Properties:**  
 Username       IP Address       Date Started  
 Time Started       Date Completed       Time Completed

**User Properties:**  
 First Name       Last Name       Email Address  
 Company       Current Position       Location

**Email List Properties:**  
 Email First Name       Email Last Name       Email List Address  
 Custom Data 1       Custom Data 2       Custom Data 3

You can include number of addition properties with the report

### Step 4 - Save report

Click **Save** button to save report.

Reports are filtered by: ALL Surveys

| Delete                   | Report Name   | Date Created | Edit | Send | Report Sharing                        | Access Type |
|--------------------------|---|--------------|------|------|---------------------------------------|-------------|
| <input type="checkbox"/> | <a href="#">2009 Quality Exposition Registration</a>            | 4/08/2009    |      |      | <input type="button" value="enable"/> | A           |
| <input type="checkbox"/> | <a href="#">2010 Quality Managers Forum Consultation 031209</a> | 10/12/2009   |      |      | <input type="button" value="enable"/> | A           |
| <input type="checkbox"/> | <a href="#">AMF July</a>  | 24/08/2009   |      |      | <input type="button" value="enable"/> | A           |
| <input type="checkbox"/> | <a href="#">Analysis of 2011 QSP</a>                            | 29/09/2011   |      |      | <input type="button" value="enable"/> | A           |
| <input type="checkbox"/> | <a href="#">AppDevSatisfaction</a>                              | 12/11/2013   |      |      | <input type="button" value="enable"/> | A           |
| <input type="checkbox"/> | <a href="#">Auswell's trial</a>                                 | 15/07/2010   |      |      | <input type="button" value="enable"/> | A           |

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

### Step 5 - Run the report

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

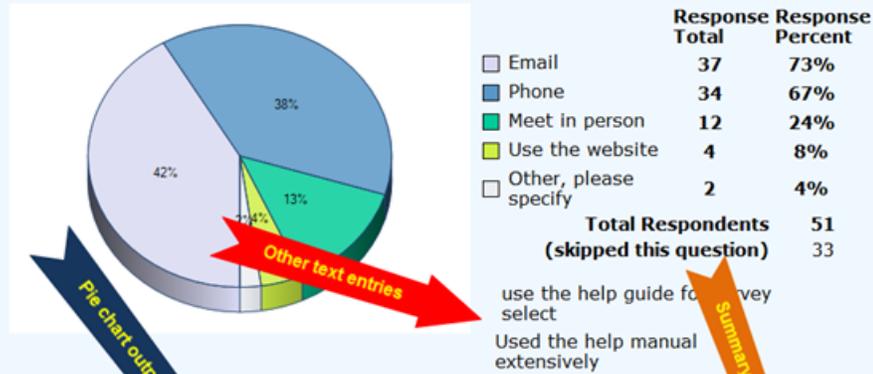
## HNELHDSelectSurveyClientSatisfaction

**Survey Title:** HNELHD SelectSurvey Client Support Satisfaction Survey

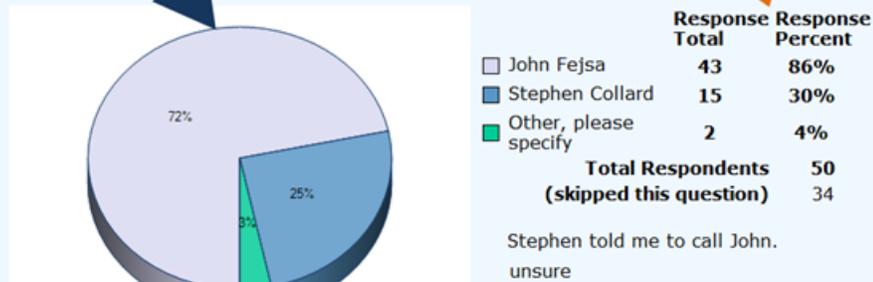
### Responses By Question Analysis:

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

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



2. Who dealt with your request or query?



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



**12.** Do you have any additional comments about your experience or suggestions on how we can improve?

Since having a lesson from John and his advice on how to fix a few things, I discovered that one of my colleagues had also had experience in using

- Select Survey and she sat with me for 30 minutes to assist with selecting the questions that I needed and the appropriate field for what I needed to capture.
- Very helpful.
- No
- Do you offer face to face training. Sometimes a one day face to face training course is better served than reading the manuals which are a little daunting.  
This is a great resource. I think that it is perhaps now widely known about through the area and it is of great benefit. Perhaps some more publicity about it would be good.
- Do you run classes in survey design?
- We need a user friendly software as consumer feedback is vital, and much research requires survey responses. SelectSurvey is not my first choice.  
IT knowledge excellent, however support is limited by what the staff member has on which could sometimes be frustrating. It would be good to have someone help one on one as some of the issues are hard for a casual user.  
IT person's emails were sometimes very long and technical  
John has always provided excellent service but there was a couple of times I needed assistance when he was away and no one else could
- 

Text responses

## Step 6 – Share reports

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

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

Reports are filtered by: ALL Surveys

| Delete                   | Report Name   | Date Created | Edit | Send | Report Sharing          | Access Type |
|--------------------------|---|--------------|------|------|-------------------------|-------------|
| <input type="checkbox"/> | <a href="#">HNE/LHD Select Survey Client Satisfaction</a> | 12/11/2013   |      | Y    | <a href="#">disable</a> | A           |
| <input type="checkbox"/> | <a href="#">AppDev Satisfaction</a>                       | 12/11/2013   |      | Y    | <a href="#">disable</a> | A           |
| <input type="checkbox"/> | <a href="#">Allied Health Form 2013</a>                   | 12/11/2013   |      | Y    | <a href="#">disable</a> | A           |

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

**Email Custom Report**

**Step 1 of 2 -- Email Custom Report**

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

**Select Email List**

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

-- Please Select --

**Apply Filter**

Send to all email addresses

Send to email addresses that match:

**Active:** No

**Email Address:**

**Custom Data 1:**

**Custom Data 2:**

**Custom Data 3:**

You may want to further filter the email addresses in the list by only sending to recipients who match specific criteria; for example, only managers.

Cancel Continue

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





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

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

| <a href="#">Default</a> | <a href="#">Email List Name</a> | <a href="#">Addresses</a>  | <a href="#">Messages</a>  | <a href="#">Edit</a>  | <a href="#">Delete</a>  | <a href="#">Import</a>  | <a href="#">Export</a>  | <a href="#">Send</a>  |
|-------------------------|---------------------------------|--|---|---|---|---|---|---|
| No                      | itech test                      |  1 |  |  |  |  |  |  |

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

| <a href="#">Sent Date</a> | <a href="#">Survey Name</a> | <a href="#">Email Subject</a> | <a href="#">Response Count</a> | <a href="#">Sent Count</a> | <a href="#">Send Follow-Up</a>  | <a href="#">Details</a>   | <a href="#">Archive</a>   |
|---------------------------|-----------------------------|-------------------------------|--------------------------------|----------------------------|---|---|---|
| 1/5/2015                  | email data token test       | testing from 20 demo          | 3                              | 1                          |  |  |  |

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

 **Send Follow Up Message****Step 1 of 2 -- Select Statuses for Follow-Up Message**

The subject of the original email message was 'testing from 20 demo'. Each recipient of the this email message has a status of No Response, Declined, or Responded. You can send a follow-up to the original recipients of this email message based on their current status. You must select at least one status from the list below.

**Select Statuses**

Select at least one status from the list below.

- Write EID URLs to File** - Does not send email, writes unique URLs to file. This will write the sent history to the table for tracking with the EID link from a third party email program.
- No Response** - Recipients who have not clicked on or responded to the original email message.
- Responded** - Recipients who have clicked on the link to the original email message.
- Completed** - Recipients who have completed the survey linked in the original email message.
- Declined** - Recipients who responded by declining to take the survey.
- Exclude Opt-Outs** - Exclude recipients who clicked to opt-out.
- Exclude In-Active Emails** - Exclude emails that were de-activated after the original email was sent.

## Send Follow up Message

### Step 2 of 2 -- Follow-Up Message Details

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

|                              |   |
|------------------------------|---|
| Survey Name:                 | test  |
| Email List Name:             | debug email list<br>This List was Last Sent on: 5/26/2016 5:01:37 PM With Email Subject: test   |
| <b>Pre-Populate Message:</b> | <input type="radio"/> Default <input type="radio"/> From Prior Email <input type="radio"/> From Email Template  |
| <b>Send Date:</b>            | Enter the date and time that you want the follow up emails to be sent on.<br>06/09/2016 <input type="button" value="Calendar"/> Now <input type="button" value="v"/>  |
| <b>Email Subject:*</b>       | <input type="text" value="Enter the subject of email"/>   |
| <b>'From' Name:</b>          | Enter the NAME that you want to show that the email is being sent from.<br><input type="text" value="Enter the NAME that you want to show that the email is being sent from."/>   |
| <b>'From' Address:*</b>      | Enter the email address that the email should appear to come from.<br><input type="text" value="Enter the EMAIL address that the email should appear to come from."/>   |
| <b>Email Text:*</b>          | <input checked="" type="radio"/> HTML <input type="radio"/> Plain Text<br><b>Note: Make sure you check both email boxes, both HTML and Plain Text are always sent in multi-part mime, email client for recipient determines which message is displayed.</b> |

File Edit Insert View Format Table Tools

Undo Redo Bold Italic Text Color Background Color Bulleted List Numbered List Decrease Indent Increase Indent Link Image Text Color Font Family Font Sizes

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,

Joe Caleb

p

Show Token Help

Note. Both HTML and plain text versions are sent to each recipient (called alternate views), the recipient computer will see the plain text version if HTML is disabled in their email client or blocked by their antivirus/spam programs.

[Send Test Email](#)

Back

Cancel

Send

## Free Form Reports

Free Form Reports are intended for 360 style aggregate score reporting. Typically an entire graphical report from Word or Excel is pasted into the textbox, then the scored/aggregate numbers are replaced

by the "Survey Score and Sum Response Tokens", or the "360 Tokens" from the menu bar in the rich text box labelled "TOKENS". There are SCORE and SUM tokens for each cell of a matrix or question type that has points assigned to it, so that you can take a single column/row and aggregate those totals separately from the rest of the question. When the report is viewed, the tokens are replaced by the real time numeric calculated data from the responses.

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

| TOKEN                | CHART TYPE                                 |
|----------------------|--|
| <b>###RAD=SP###</b>  | Specific Practice Radar Chart              |
| <b>###GML=GP###</b>  | Generic Practice Final Levels Chart        |
| <b>###SML=SP###</b>  | Specific Practice Final Levels Chart       |
| <b>###PL=GP###</b>   | Generic Practice Response Breakdown Chart  |
| <b>###PL=SP###</b>   | Specific Practice Response Breakdown Chart |
| <b>###SR=GAMP###</b> | Response Breakdown Chart                   |
| <b>###SR=ISO###</b>  | ISO Response Breakdown Chart               |

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

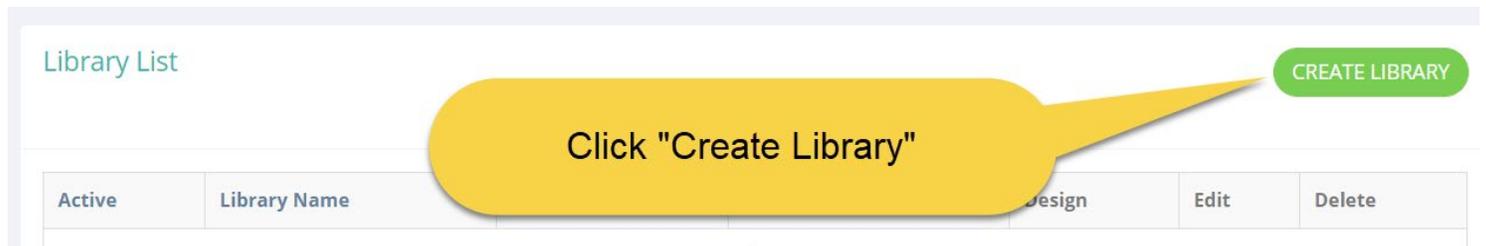
|                               |                         |
|-------------------------------|-------------------------|
| <b>###SL=[see token menu]</b> | Score Column Sum Tokens |
|-------------------------------|-------------------------|

|                               |                   |
|-------------------------------|-------------------|
| <b>###SN=[see token menu]</b> | Score Cell Tokens |
|-------------------------------|-------------------|

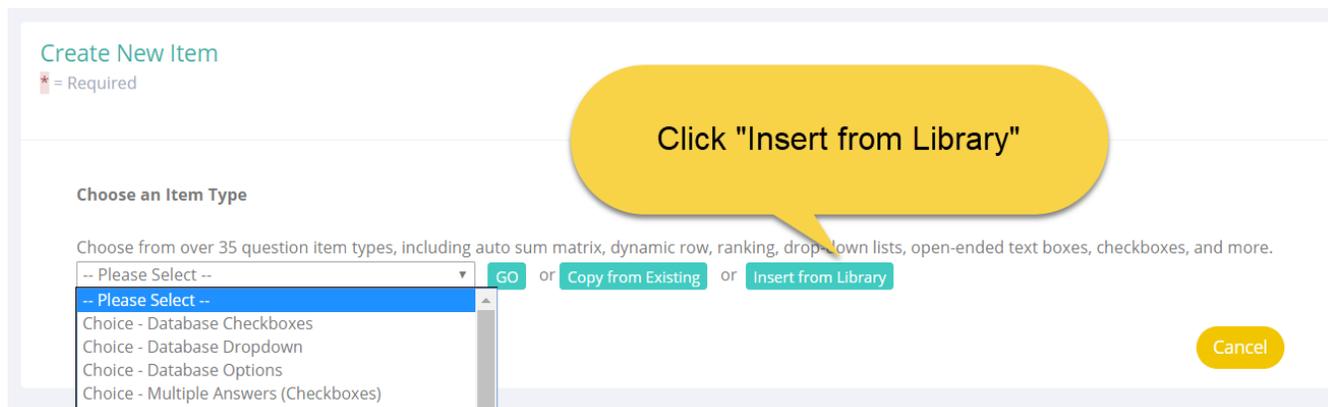
## Question Library

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

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



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



# Organize Your Surveys into Folders

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

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

☰ SELECTSURVEY.NET V5.0

The screenshot shows the SELECTSURVEY.NET V5.0 interface. On the left is a dark sidebar with navigation items: Dashboard, Workspace (+), Surveys (+), Survey Folders (-), Polls (+), Libraries (+), Templates (+), Email Lists (+), Reports (+), and Users (+). The 'Survey Folders' menu is expanded, showing options: Manage Folders, Create Folder, Edit Folder, and Set Default Folder. The main content area on the right features a teal '+ Create' button, a section for 'Active Surveys' with a dropdown menu set to '--All Surveys--', and a table with columns 'Manage' and 'Stat'.

| Manage | Stat |
|--------|------|
| CLOSE  | Ope  |
| LAUNCH | Des  |
| CLOSE  | Ope  |

Click **Create New Folder**

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

**Create Folder** [CREATE NEW SURVEY](#)

**New Folder Options**

Create a new folder to contain groups or categories of surveys.

Folder Name:

Owners:

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

Click **Save** again.

Click “Edit Folder” to edit a folder:

**Edit Folder** [CREATE FOLDER](#)

Edit Folders

| Edit Folder Name        | Edit Folder Security                      | Edit Individual User Owners (separate usernames with a semicolon \';' i.e. jdoe;bsmith;) | Edit User Group Owners (separate group names with a semicolon \';' i.e. customerservicegroup;techgroup;) |                                       |
|-------------------------|---|--|--|---------------------------------------|
| test folder that is pub | Public to all Admin and Create Role Users | admin;   | admin;   | <input type="button" value="delete"/> |
| new                     | Public to all Admin and Create Role Users | admin;   | admin;;  | <input type="button" value="delete"/> |
| Default Folder          | Restricted to Owners                      | admin;create;  |  | <input type="button" value="delete"/> |

**To add surveys to your new folder:**

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



## Manage Survey Folders

[CREATE FOLDER](#) | [EDIT FOLDER](#)

| Folder  | Survey Title       | Date Created | Status |
|---|--------------------|--------------|--------|
| <div data-bbox="116 415 493 525"><p>Default Folder<br/>new<br/>test folder that is public<br/>--No Folder--</p></div> | Question Type Demo | 09/01/2014   | Open   |
| <div data-bbox="116 533 493 617"><p>Default Folder<br/>new<br/>test folder that is public</p></div>                   | test               | 08/25/2014   | Open   |