SelectSurvey.NET Basic Training Class 1

3 Hour Course

Updated for v.4.154.03 10/2016

SelectSurvey.NET Basic Training

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

Contents

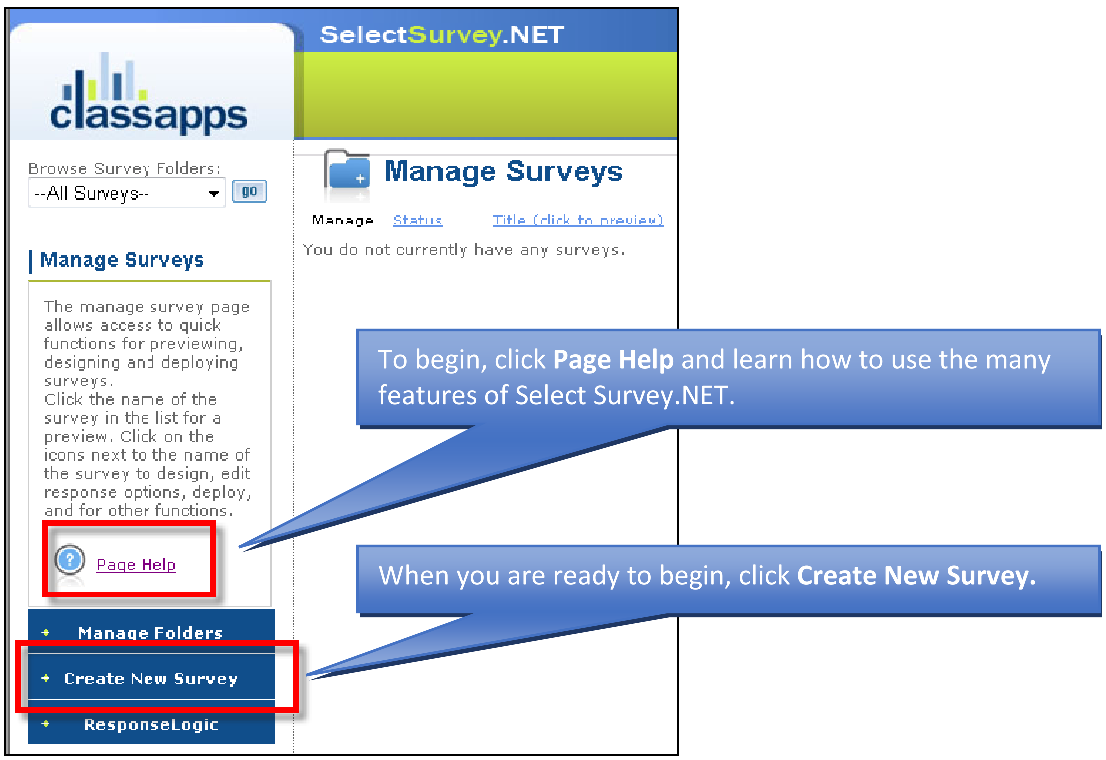
Course Outline

- Create a Survey from Scratch
- Choose Question Type
- Modify Survey
- Insert a New Question on a New Page
- Add Page Conditions
- Add Question Condition
- Preview Your Survey
- Set Survey Options
- Deploy Your Survey
- Monitor the Responses
- Print or Export Data
- Reports
- Share the Results with Others
- Keep a Library of Questions
- Organize Your Surveys into Folders
- Logout

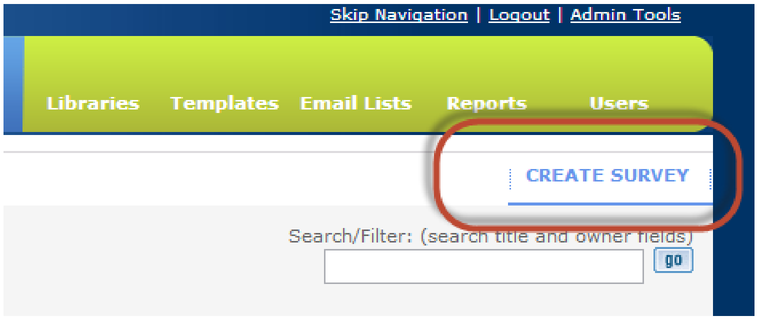
Create a Survey from Scratch

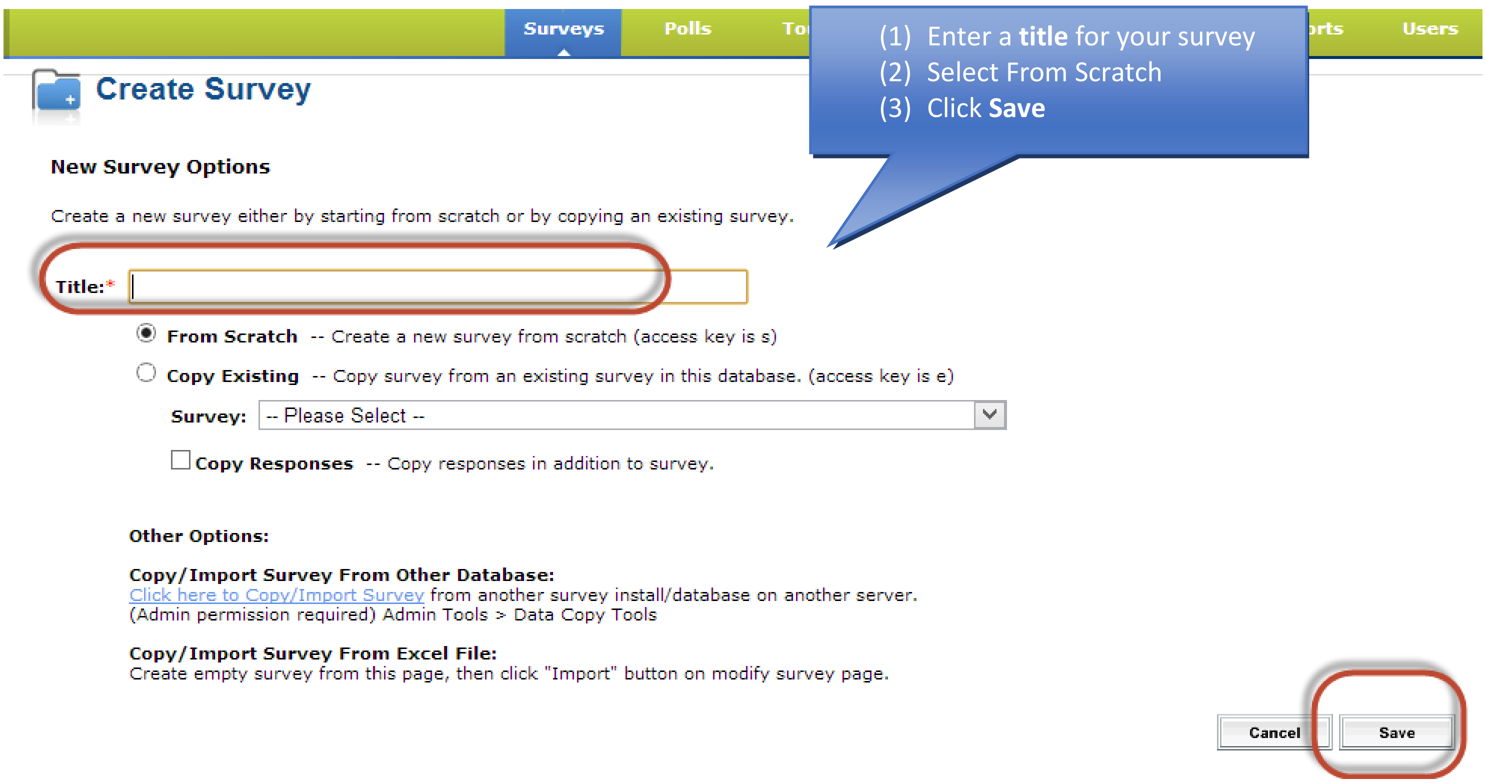
You will have to create your first survey from scratch. Once you have a survey created you can use it to create more surveys. Go to the link provided by your company or organization to login. You should see a page that looks similar to the image below.

This is the Manage Surveys window. Eventually you will see all of your surveys listed here.



You can also see there is a “CREATE SURVEY” link in the upper right corner on the modify survey page.


Skip Navigation | Logout | Admin Tools
Libraries
Templates
Email Lists
Reports
Users
CREATE SURVEY
Search/Filter: (search title and owner fields)
go


Surveys
Polls
Users
(1) Enter a **title** for your survey
(2) Select From Scratch
(3) Click **Save**
Create Survey
New Survey Options
Create a new survey either by starting from scratch or by copying an existing survey.
Title:*
From Scratch -- Create a new survey from scratch (access key is s)
Copy Existing -- Copy survey from an existing survey in this database. (access key is e)
Survey: -- Please Select --
Copy Responses -- Copy responses in addition to survey.
Other Options:
Copy/Import Survey From Other Database:
Click here to Copy/Import Survey from another survey install/database on another server.
(Admin permission required) Admin Tools > Data Copy Tools
Copy/Import Survey From Excel File:
Create empty survey from this page, then click "Import" button on modify survey page.
Cancel
Save

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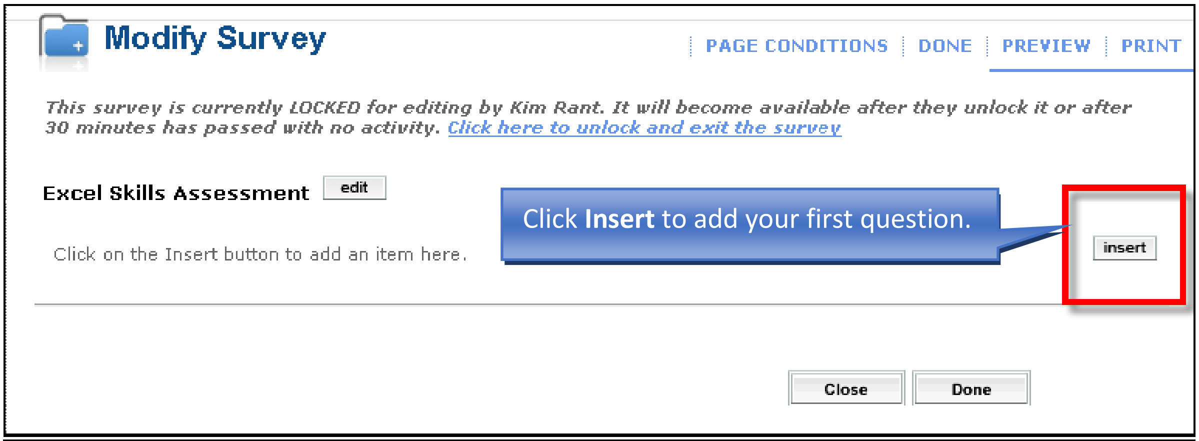
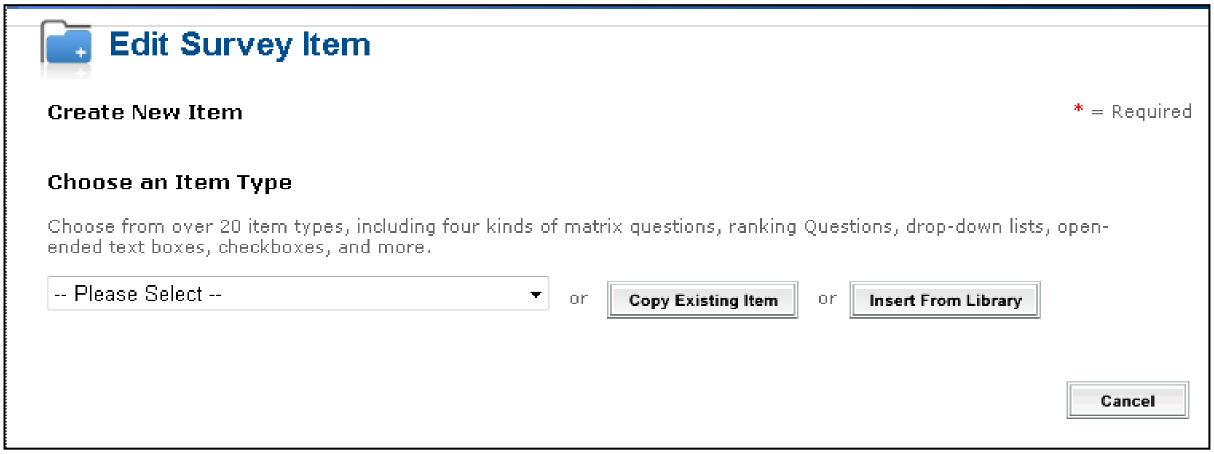
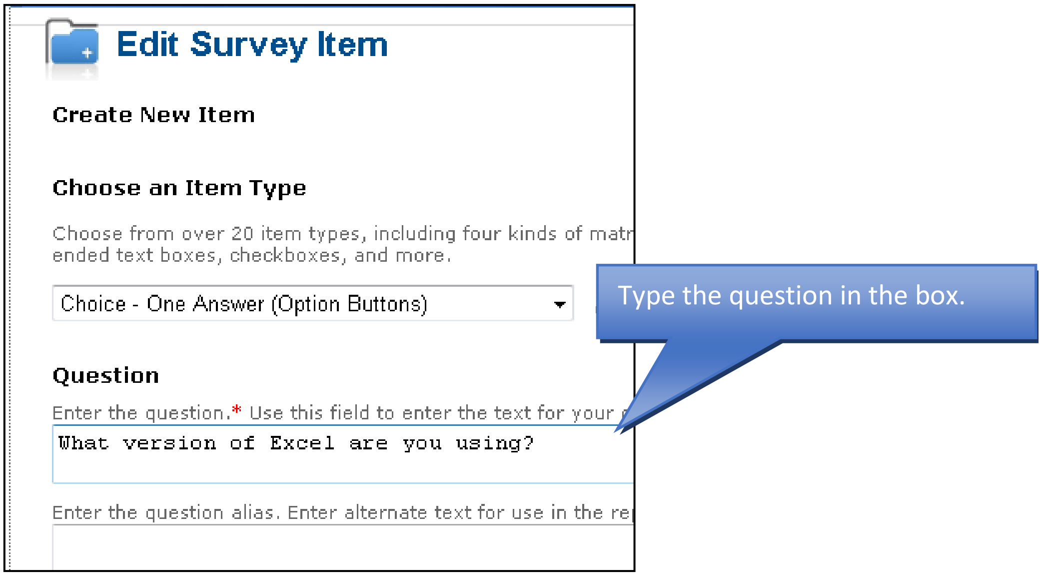


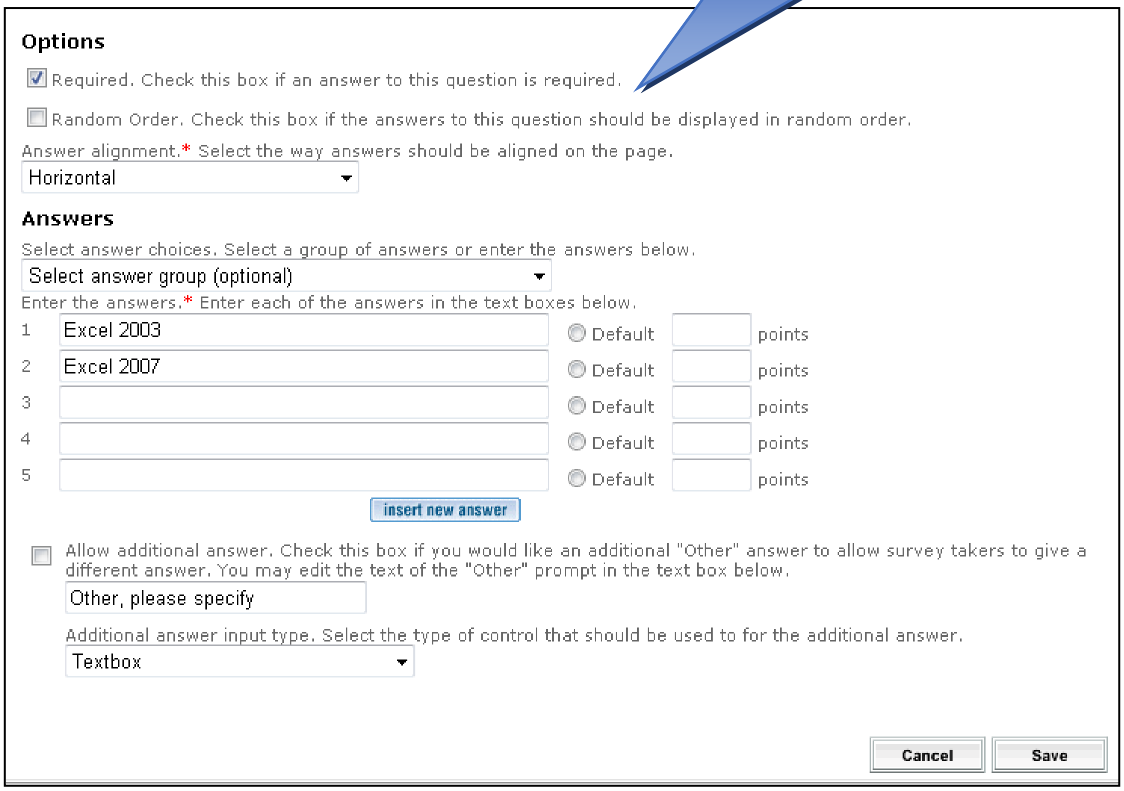


For instance, here we chose **One Answer (Option Buttons):**



Select whether an answer is **Required**.

Select **Horizontal** or **Vertical Alignment** of the answer choices.



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.

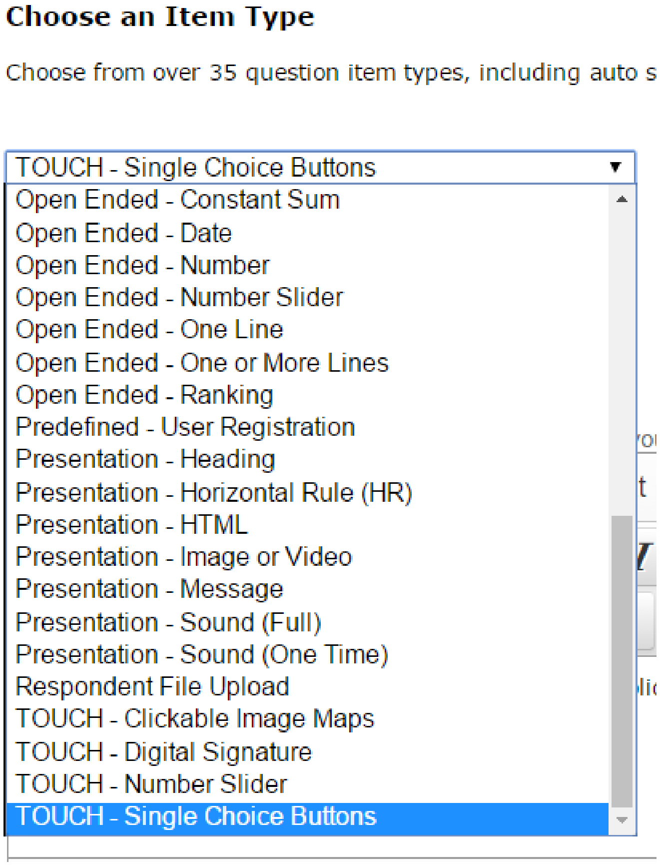
Presentation Question Types:
Question types that display or highlight information to the respondent.

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.

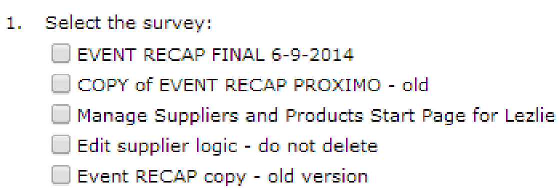
Touch Question Types:
Question types that are specific to kiosk, ipad or touch screens. Note that all question types work on these devices, these are just specific to this presentation type.

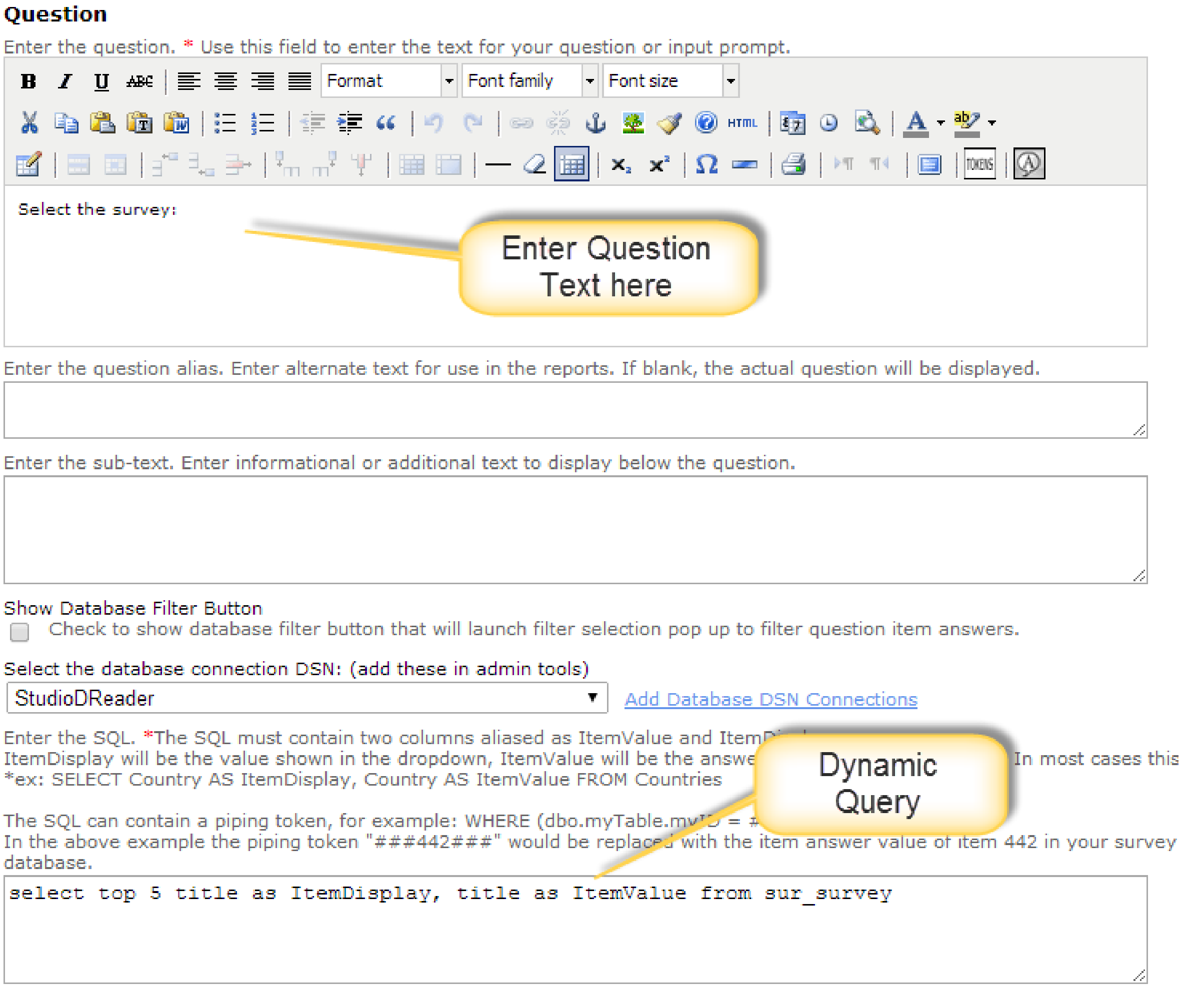
Choose Question Type

The steps that follow will vary based on the type of question you chose. There are 36 different question types, and each has multiple options. To pick a question click “Insert” on the modify survey page and you will see a drop down box similar to the below to pick a question type from:



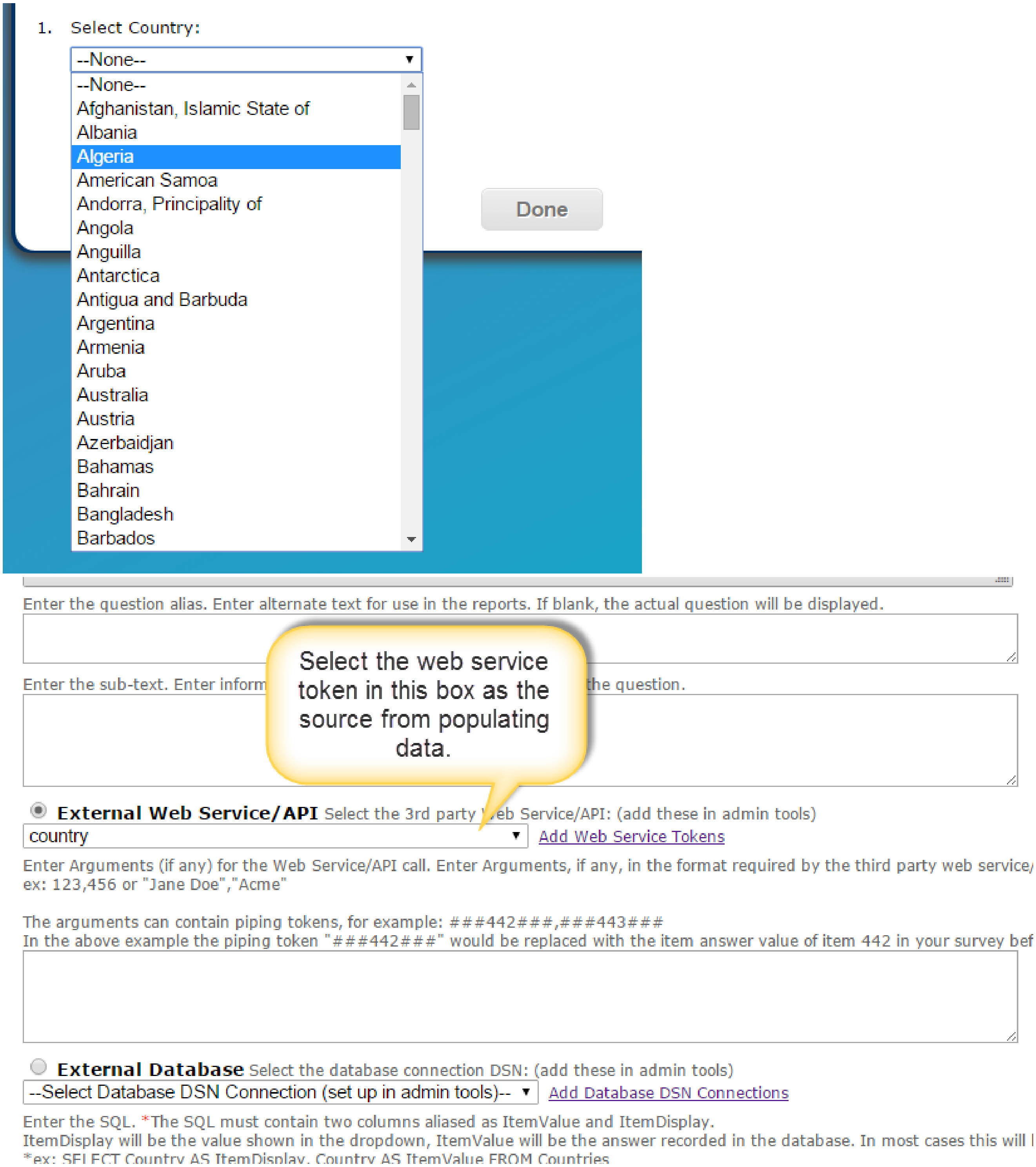
- **Choice - Database Checkboxes**
  Entering your dynamic database query returns rows for checkbox list.





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

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



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

- **Choice – Database Options**

Entering your dynamic database query returns rows for radio buttons.

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

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

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

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

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

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

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

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

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

3. Pick your favorite car

Posrche
Corvette
Mercedes

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

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

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

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

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

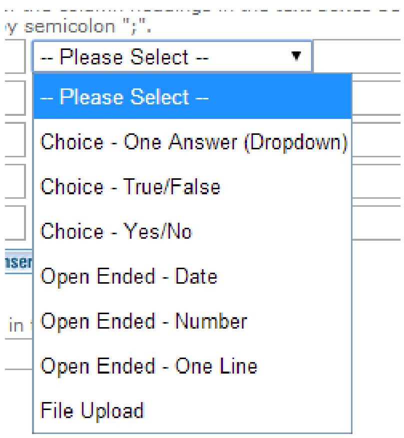
8. Example of "Choice - Yes/No" Question Type.
   Is the sky blue?
   ○ Yes ○ No

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

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

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

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



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

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

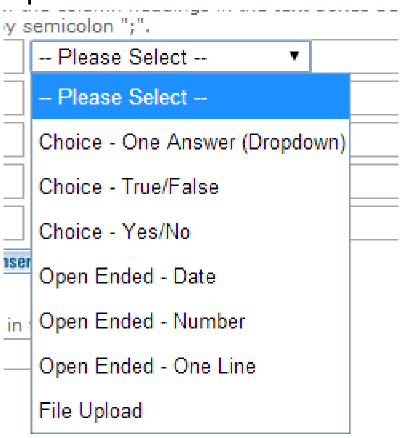
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Row1	☐	☐	☐	☐	☐
Row2	☐	☐	☐	☐	☐
Row3	☐	☐	☐	☐	☐

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

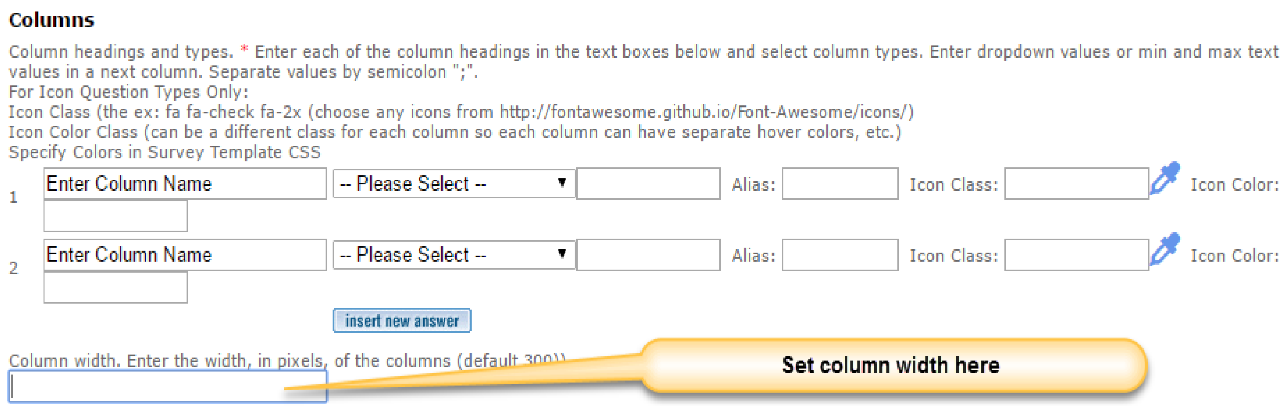
11. Example of "Matrix - Multiple Answers per Row (Text/Dropdown)
This question allows different question types in each column.

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

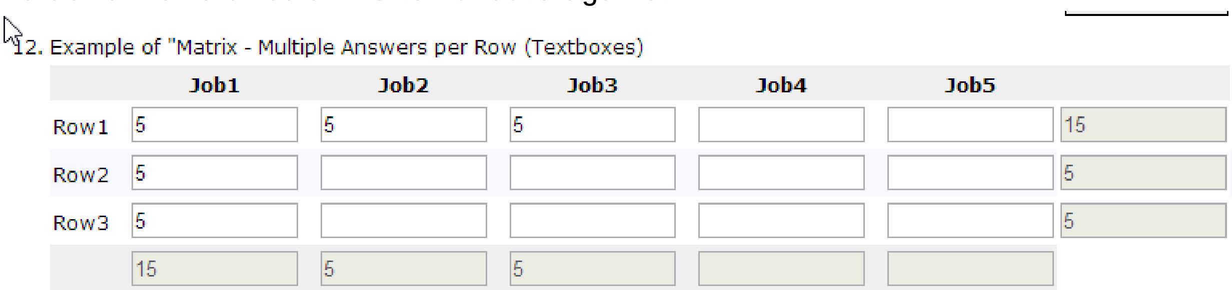
Column types are: Choice – One Answer (Dropdown), Choice – True/False, Choice – Yes/No, Open Ended – Date, Open Ended –Number, Open Ended – One Line, File Upload.



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



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



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

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

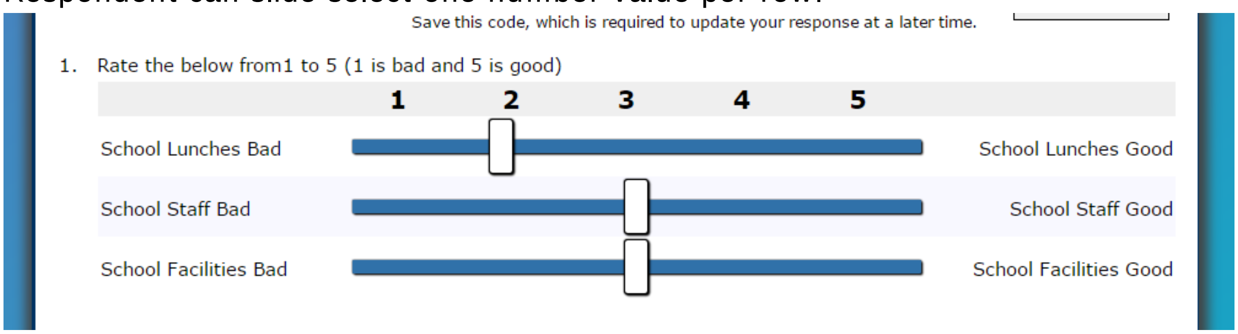
	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Row1	◯	◯	◯	◯	◯
Row2	◯	◯	◯	◯	◯
Row3	◯	◯	◯	◯	◯

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

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

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

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



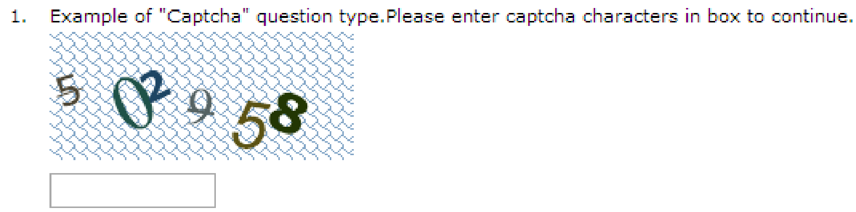
- **Open Ended – Calculated**
  This question display a dynamically calculated number calculated from piping tokens or formula that you type in, and displays it to the respondent.

7. Your body mass index is:

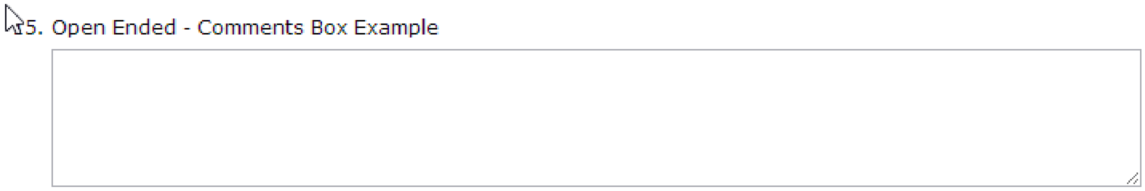
22

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

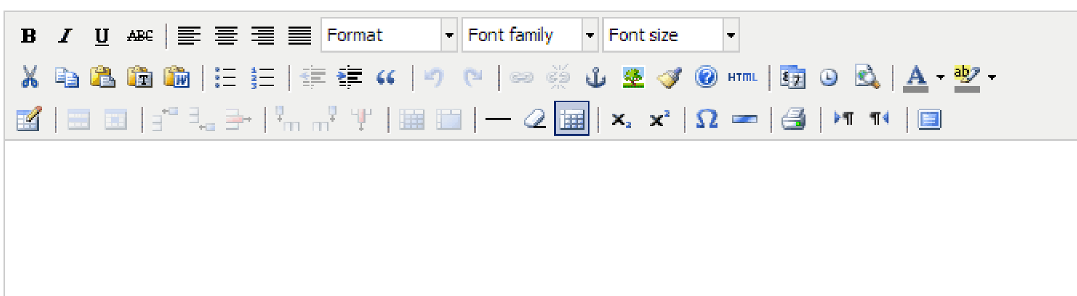
- **Open Ended – Captcha**
  The captcha question type prevents "robots" or "bots" from taking your public facing surveys. By placing a captcha question on the first page, you can eliminate spam responses.



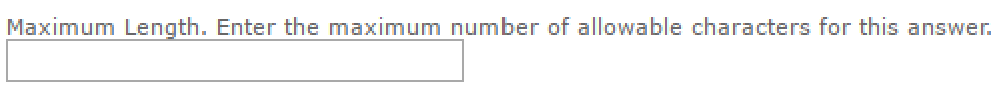
- **Open Ended - Comments Box**
  Respondent can enter or paste in unlimited text (specified by text data type in database only limited by disk space). Optionally you can choose to display a rich text box for the respondent instead of a plain text box.
  Respondent can fill this question type with bar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



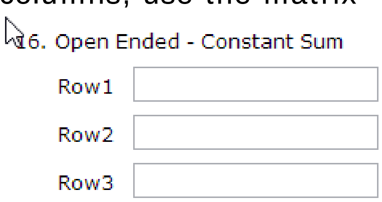
Rich text view:



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

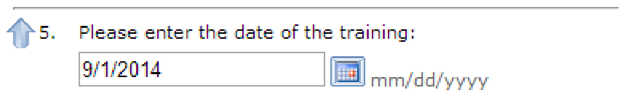


- **Open Ended - Constant Sum**
  A total is specified for the numbers on each row to add up to. If you need multiple columns, use the matrix – text boxes with auto sum feature question instead.

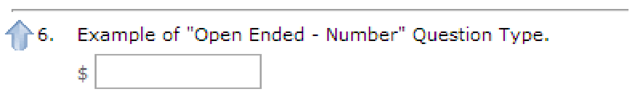


- **Open Ended – Date**

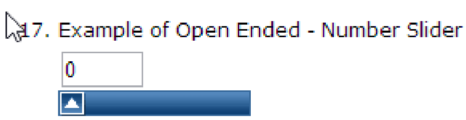
Optionally displays current date. Respondent can use the date picker, or iphone/phone date selector (html5 is used depending on the browser/phone being used by respondent). If you need alternate entry formats, use the open ended one line question type instead.



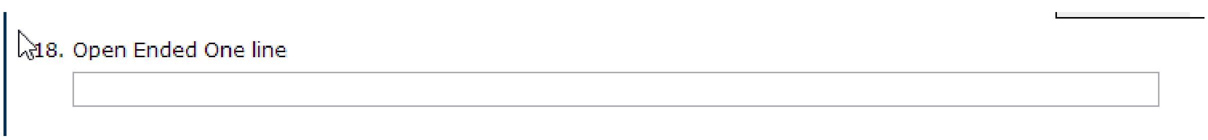
- **Open Ended – Number**
  For number entry of integers, decimals, currency, Euros. Select the number masking format from the options, or leave blank for the default for any number format.
  Respondent can fill this question type with bar code reader/scanner.



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

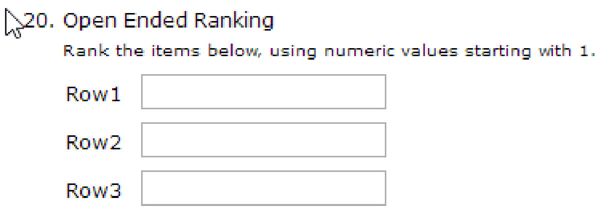


- **Open Ended - One Line**
  Specify default value (can use piping token from prior question to prepopulate). You can also specify the field width and the maximum characters allowed for respondent to enter.
  Respondent can fill this question type with bar code reader/scanner.

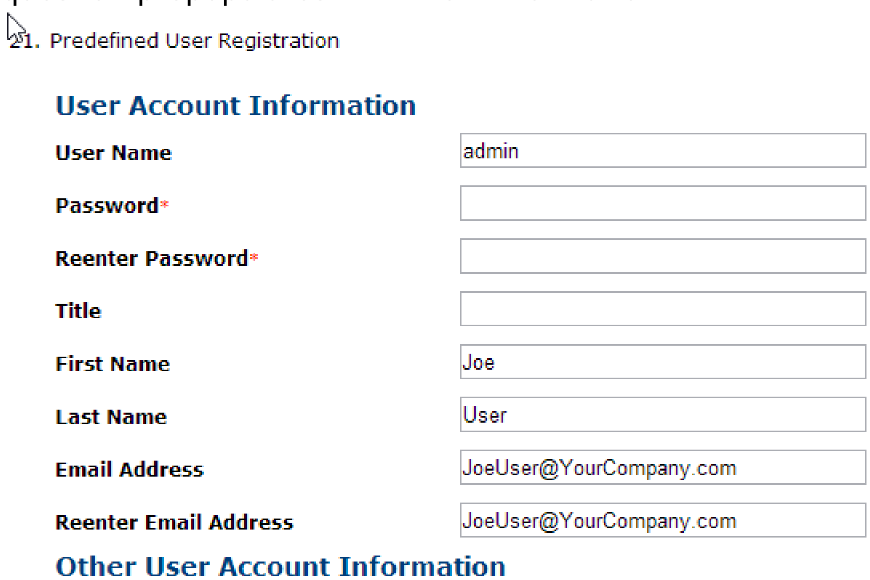


- **Open Ended - One or More Lines**
  Respondent can enter 255 characters per line. For longer text, use the comments box question type.

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



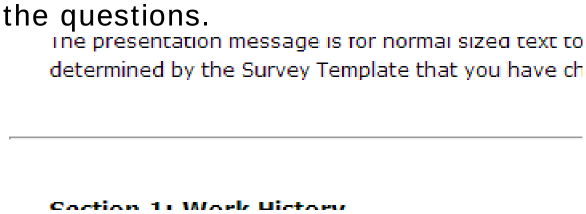
- **Predefined - User Registration**
  This question type actually creates a user in the survey system with a "user" role, which can only take surveys. Users can see surveys they are editing, or were invited to in the user workspace. Users can edit their contact information but cannot see any other admin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



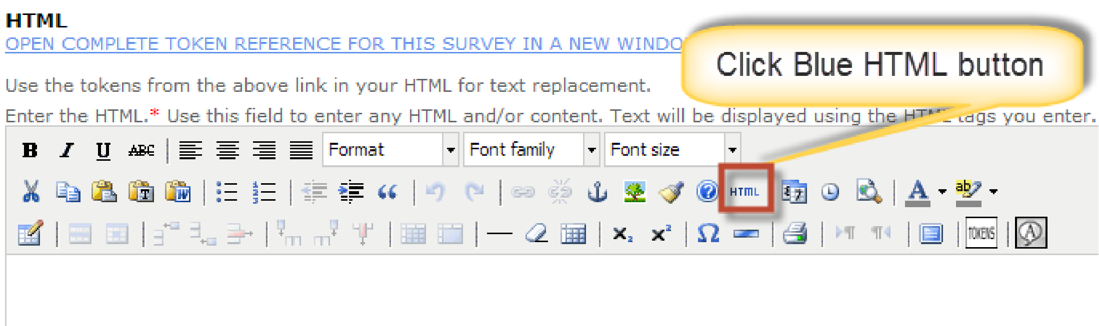
- **Presentation – Heading**
  The heading is used to separate or organize the look and feel of the survey. The style of the text is determined by the survey template that is specified on the survey options page.

Section 1: Work History

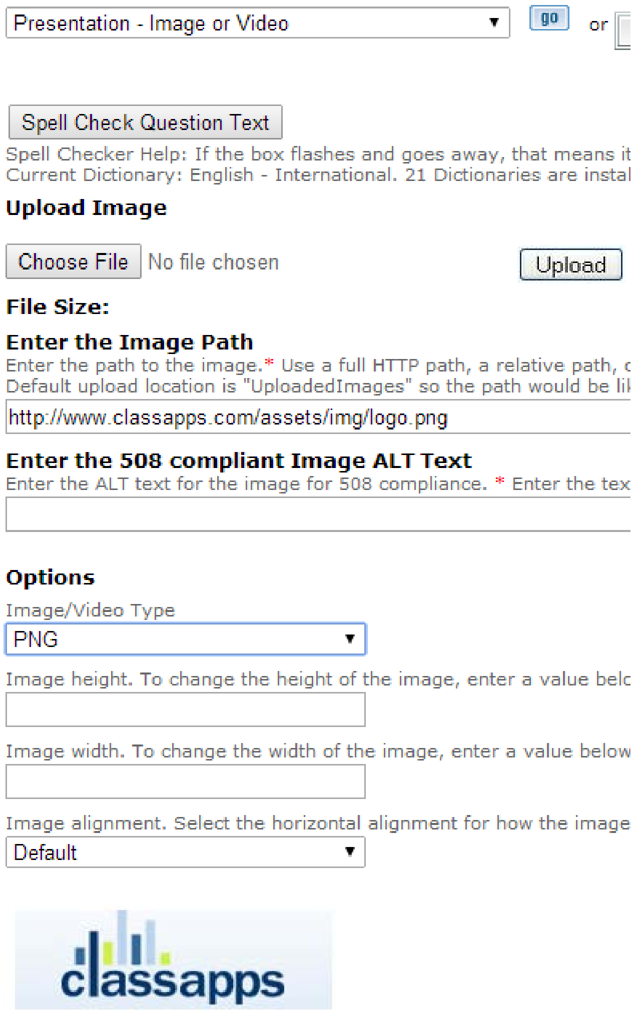
- **Presentation - Horizontal Rule (HR)**
  The horizontal rule is a thin line that goes across the page of the survey separating the questions.



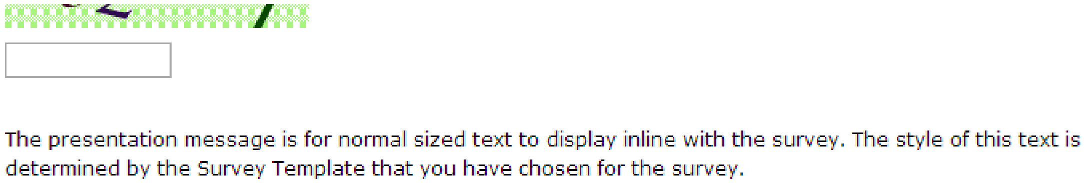
- **Presentation – HTML**
  This question type allows you to paste in any html to display to the respondent. For example, you can paste in PayPal donate button, purchasing buttons/links, maps for directions, youtube videos, dynamic content from other web sites, links to document downloads, videos, or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



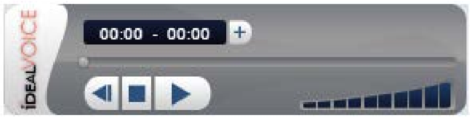
- **Presentation - Image or Video**
  Specify the web ready URL of your image or video, or upload using the upload button. Specify the height and width of the image or video or leave blank to use the image/videos actual height and width. The 508 text will show with mouse over and is also used for the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



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

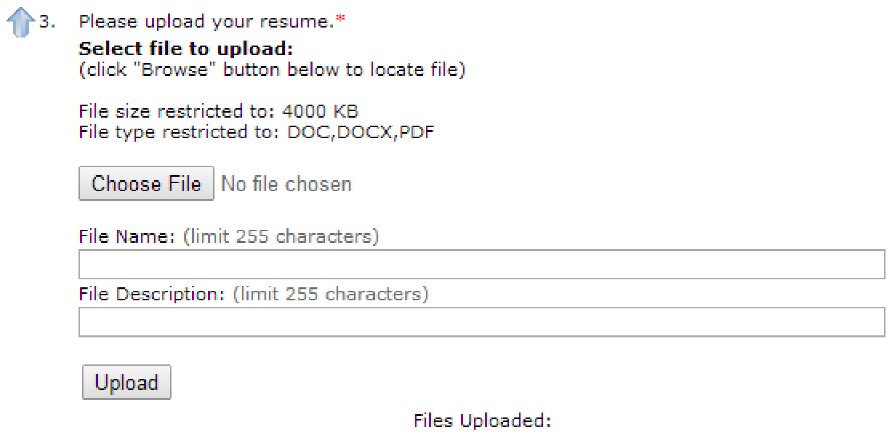


- **Presentation - Sound (Full)**
  This has all of the sound controls to replay the sound file.



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

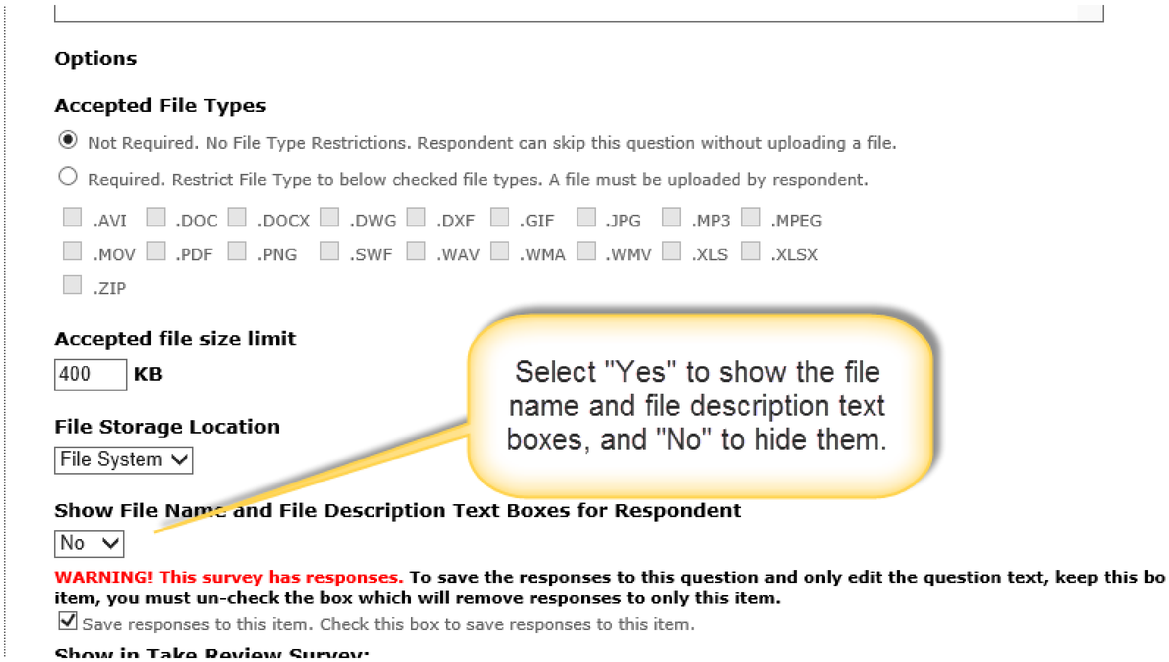
- **Respondent File Upload**
  Respondent can upload one file at a time. For multiple files, use the matrix text/dropdown or dynamic row matrix with the file upload column type.



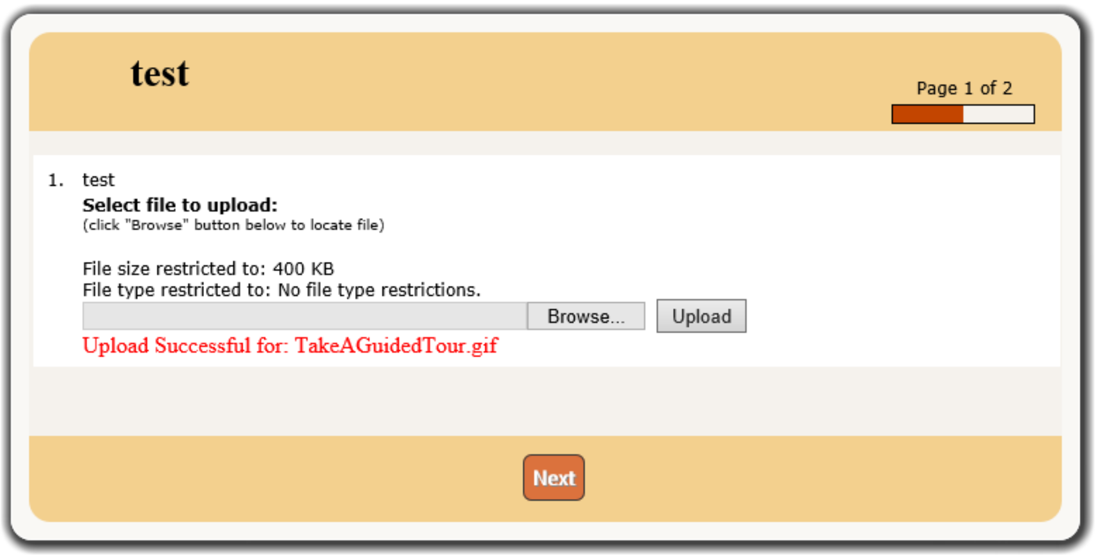
There are two display modes:

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

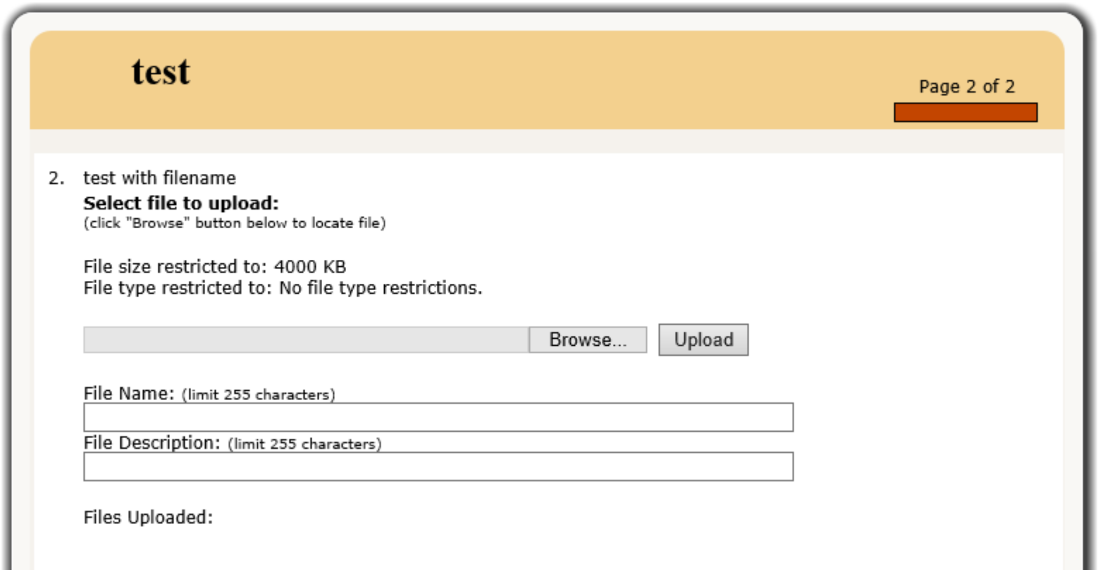
To change the setting choose “Yes” or “No” from the drop down box shown below on the edit item page:



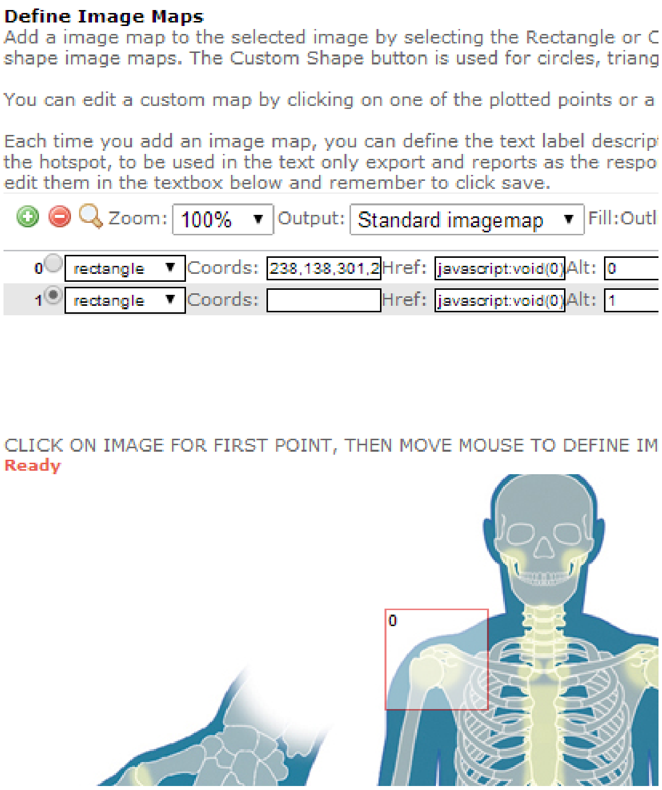
The question with the textboxes hidden looks like so:



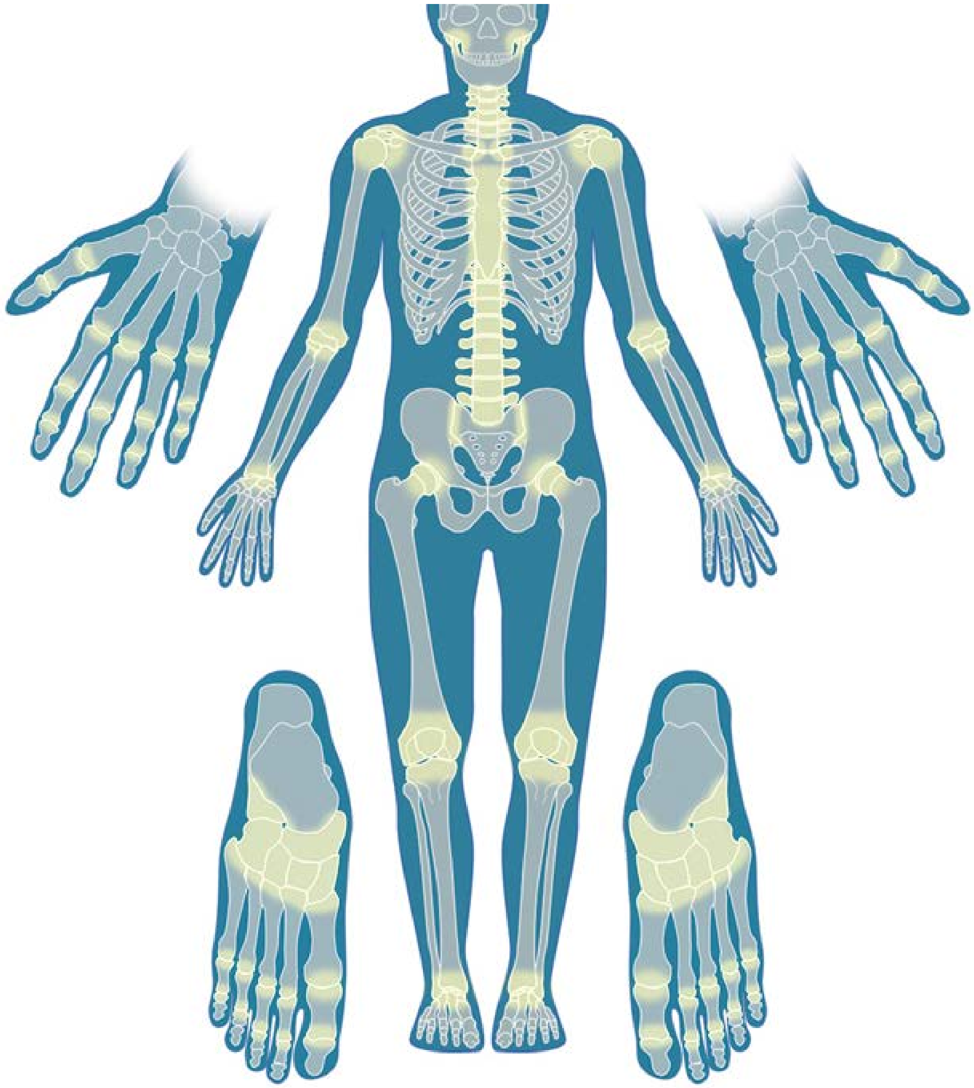
The question with the textboxes shown looks like so:



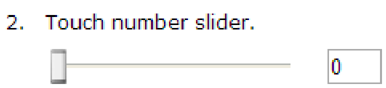
- **TOUCH - Clickable Image Maps**
  Specify an image and define your own click regions for use with kiosks and touch screens. The value from the click region is stored as the survey answer and displays in the box below the image.



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

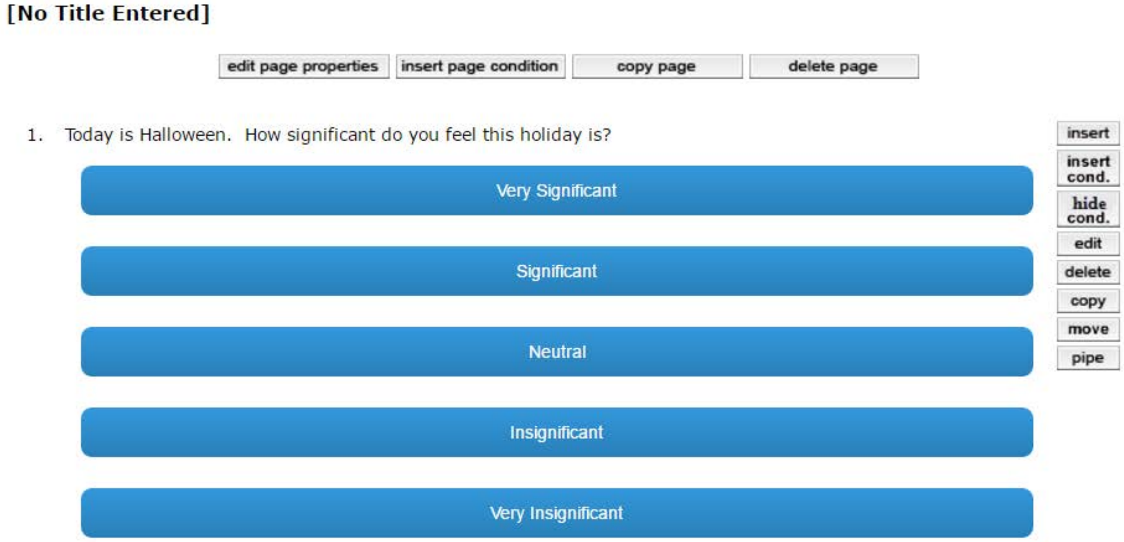


- **TOUCH - Number Slider**
  The number slider shows in html 5 if an iphone, kiosk, ipad or touchscreen is being used.

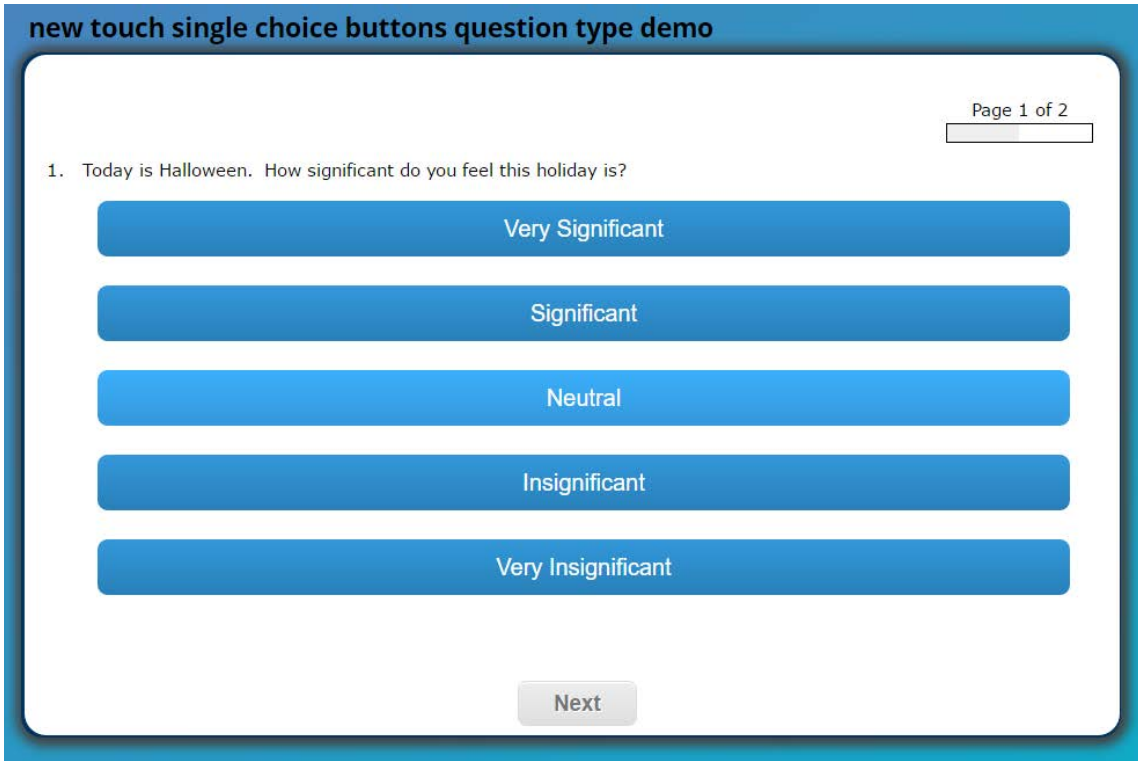


- **TOUCH – Single Choice Buttons**

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

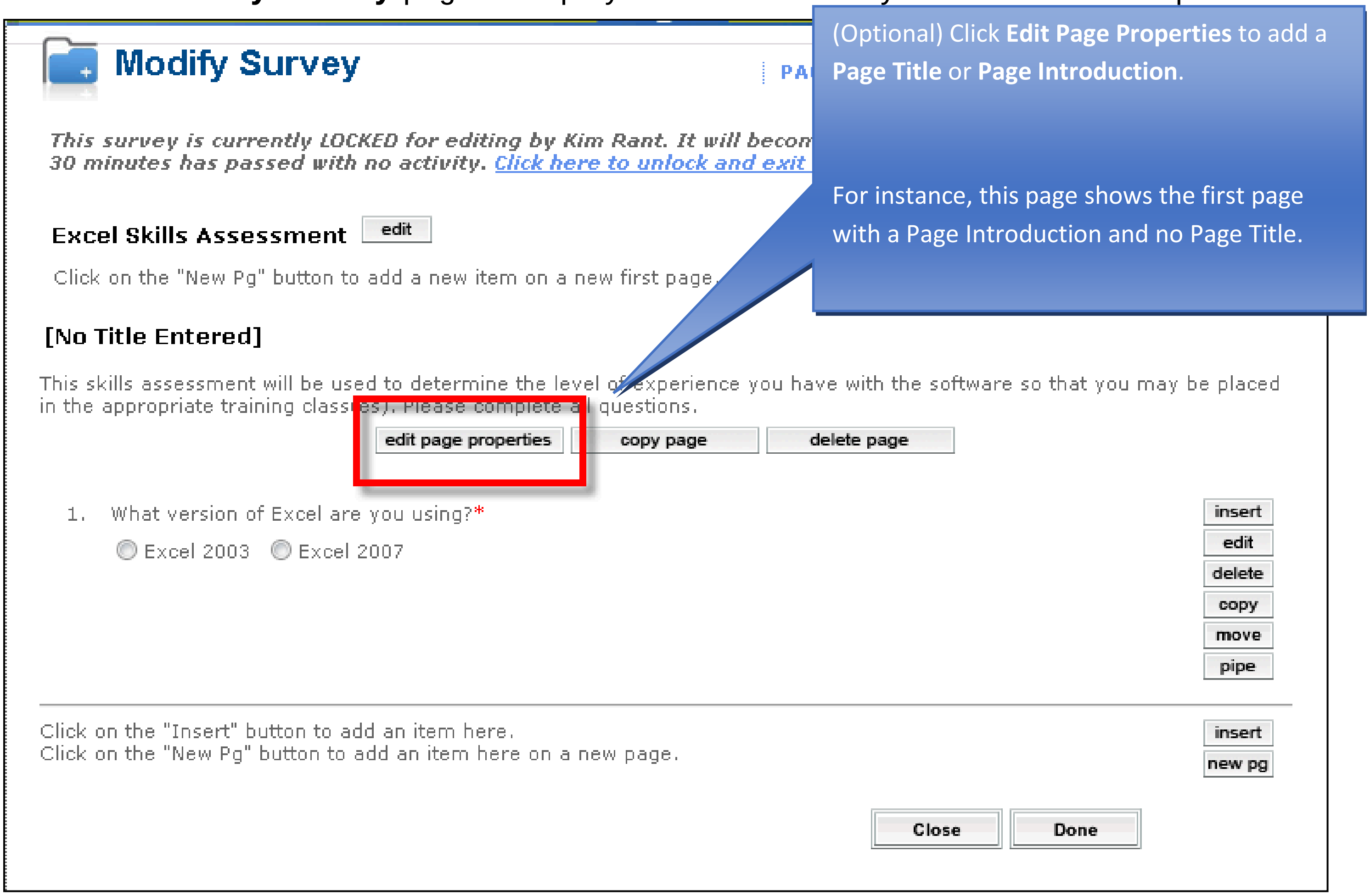


When an item is selected, the button highlights. Even when clicking the back button it will highlight what was chose prior. Below is how this looks on a survey:



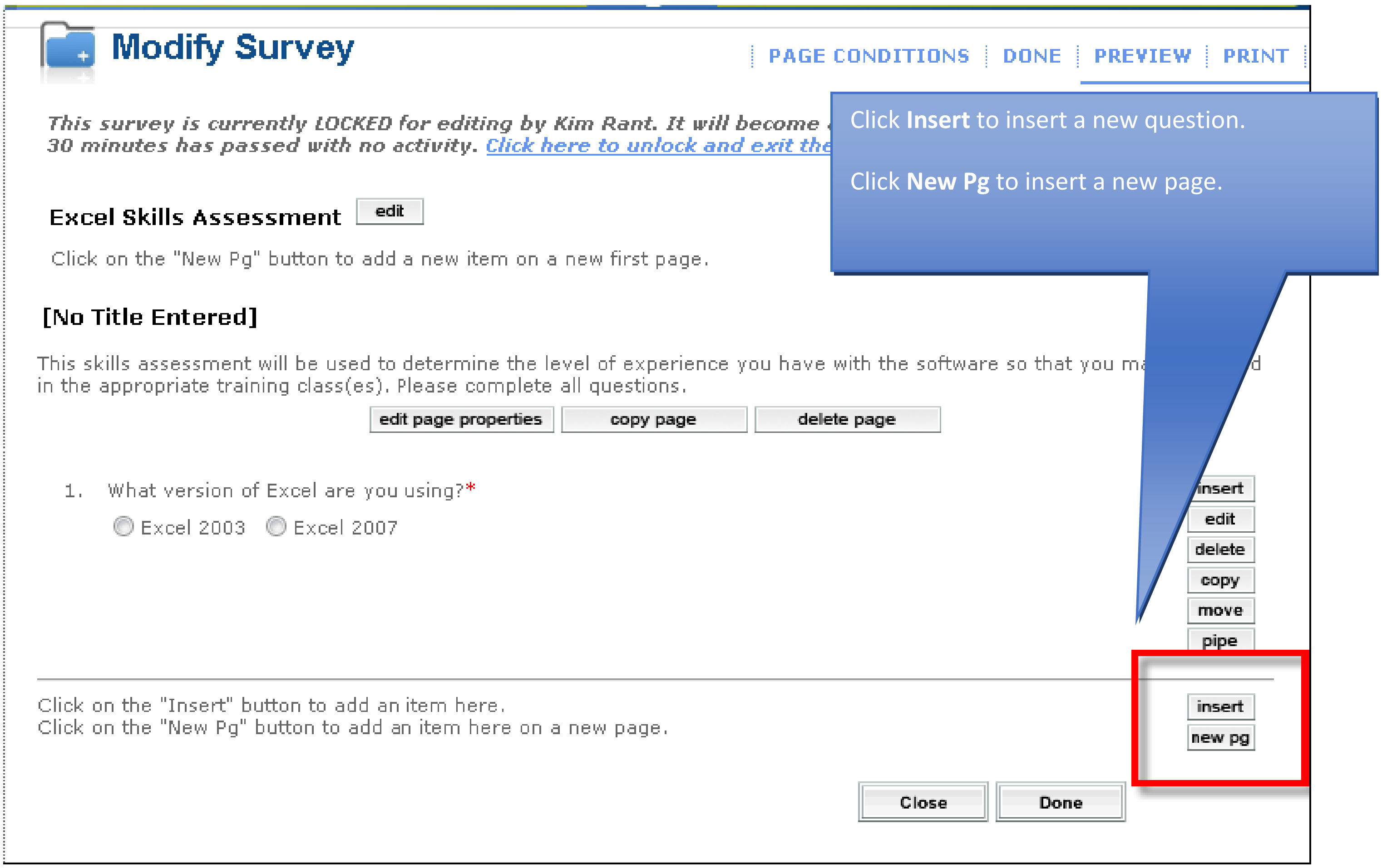
Modify Survey

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



Insert a New Question on a New Page

Your survey can contain an unlimited number of questions distributed amongst any number of pages. You can also copy existing items and then edit them.



- 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

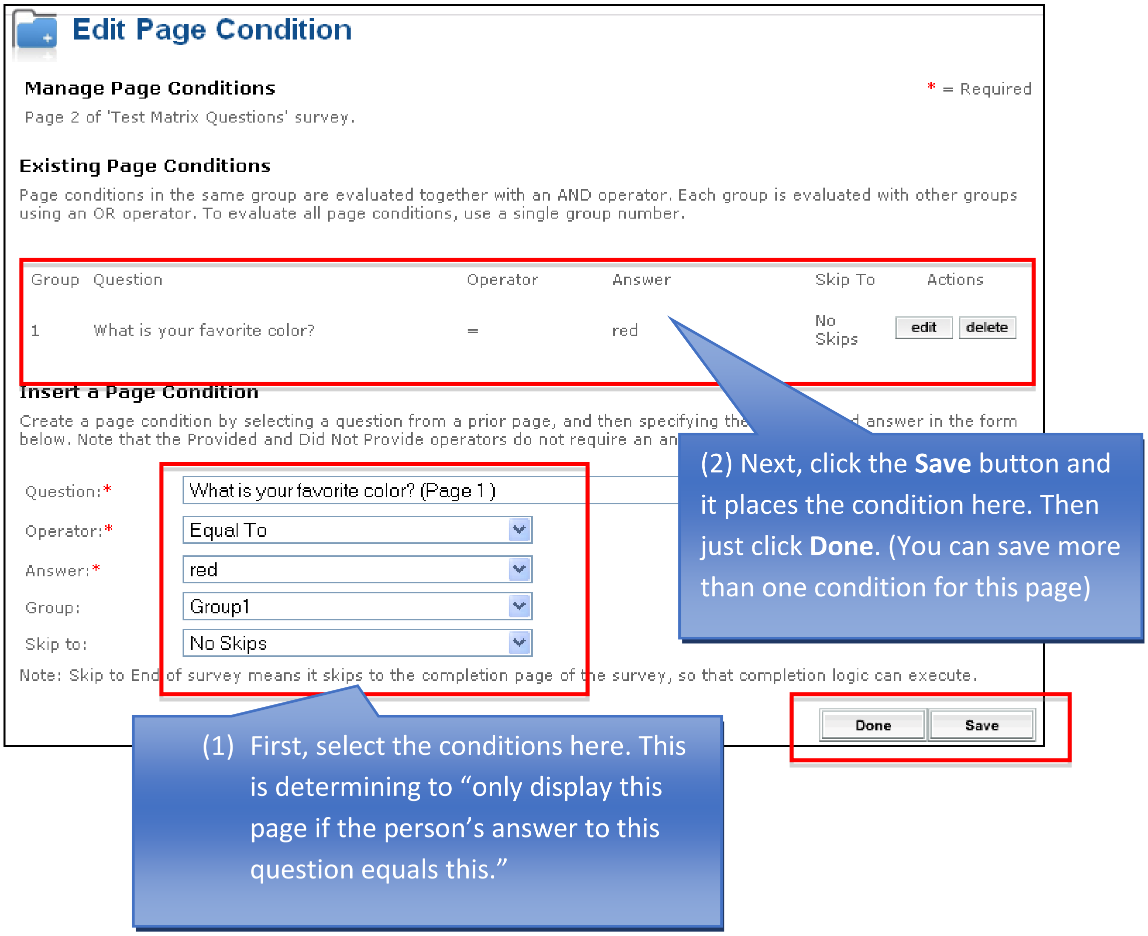
Before you begin...remember this:

- Plan ahead and insert all of your pages and questions first
- Page conditions cannot be set for **Page 1**
- There's a **Page Conditions** button for each page that you insert after Page 1
- You are setting the page conditions on the page that you want displayed. Essentially you are saying "only display this page if the following conditions are met".

In the following example the scenario is this:

- On **page 1** there's a question "**What is your favorite color**?"
- On **page 2** are the questions for people who answered **Red**
- On **page 3** are the questions for people who answered **Yellow**
- On **page 4** are more questions for everyone
- The end of the survey is just the page that says "Thank you for completing this survey...."

Click the **Page Conditions** button for **page 2 (Red):**



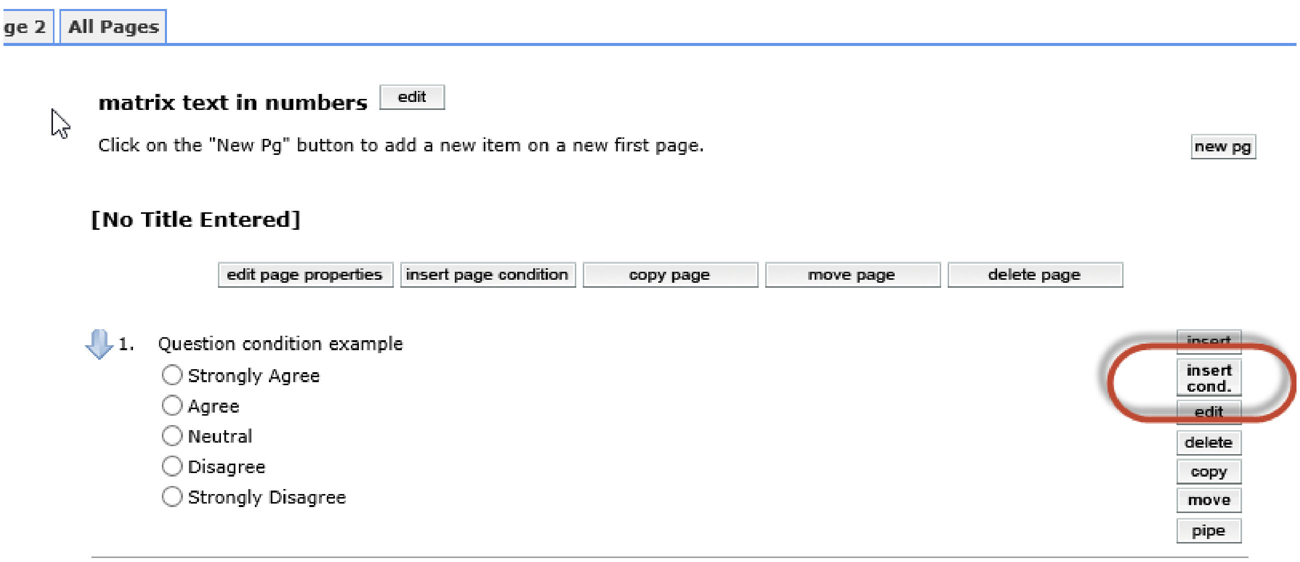
You can repeat the same process for Page 3, by selecting **Page Conditions** and editing and saving like Page 2 in the example above. If those are all of the answers that need conditions, then don't set any Page Conditions for Page 4 so everyone will automatically be taken to that page.

Question Conditions

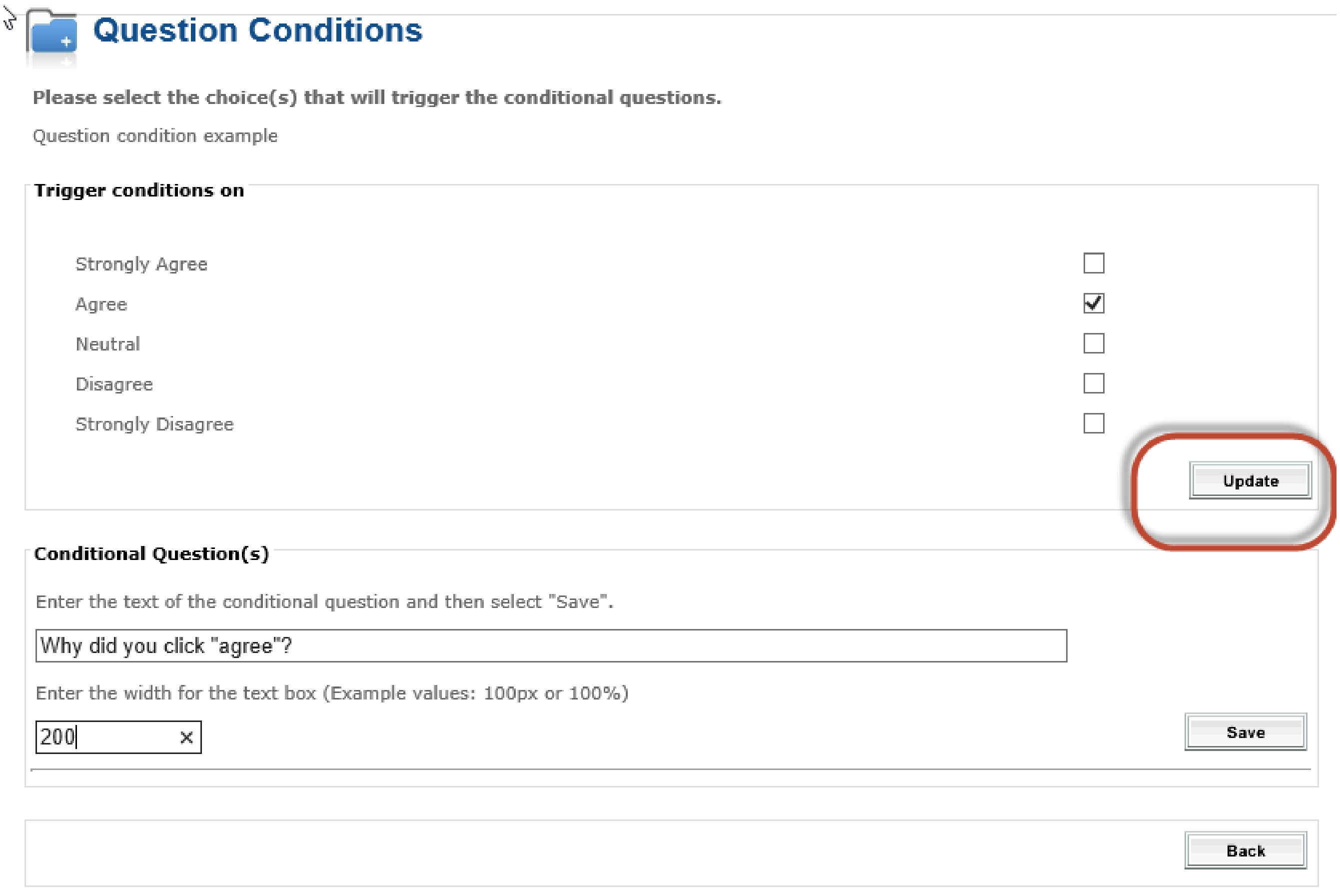
Question conditions hide or show one or more extra text box entries inside of a particular question.

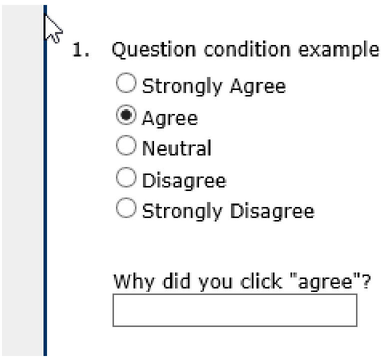
The extra text boxes are triggered by a specific answer option being selected, that you choose.

Click the “insert cond.” button to the right of the question that you want to add conditional text boxes to.

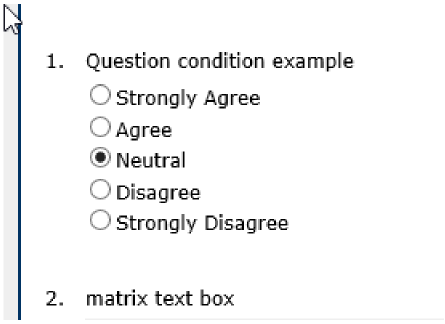


You can add multiple question conditions to a single question.





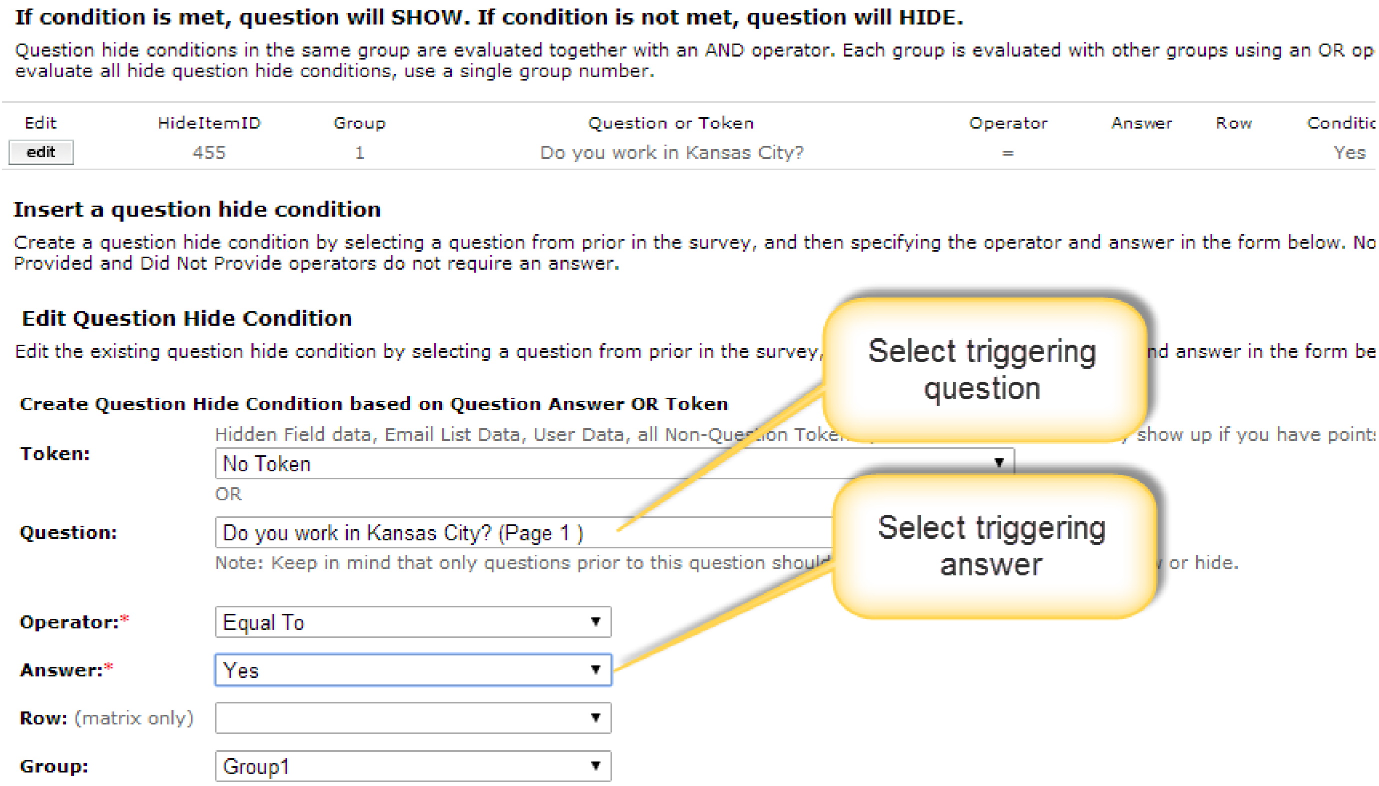
If the selection is not selected, the conditional text box does not appear:



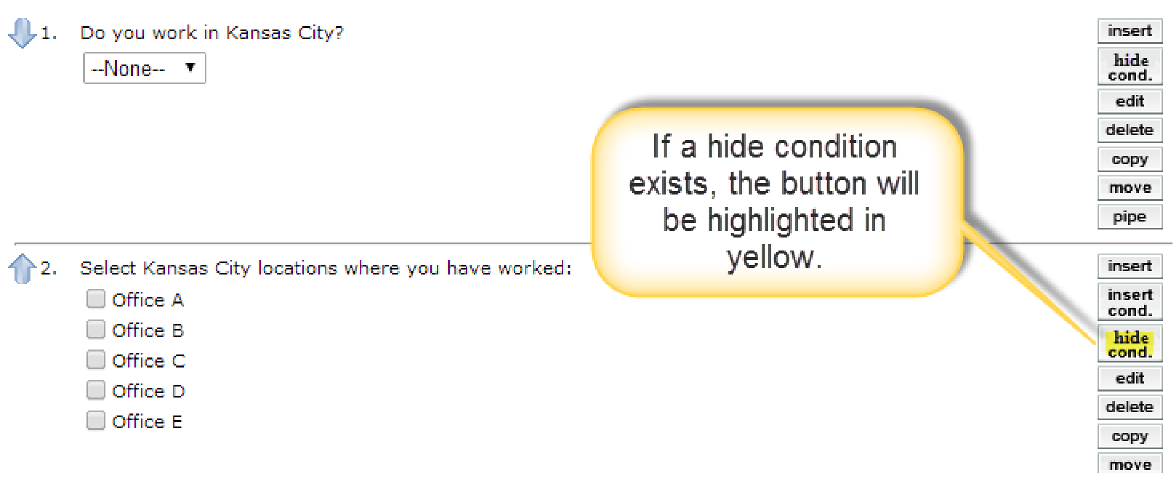
Hide/Show on Same Page Question Conditions

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

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

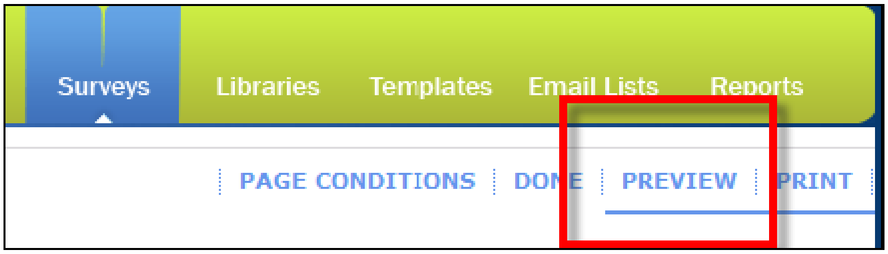


If a hide condition exists for a question on the survey, in design mode the button will be highlighted in yellow as shown below.

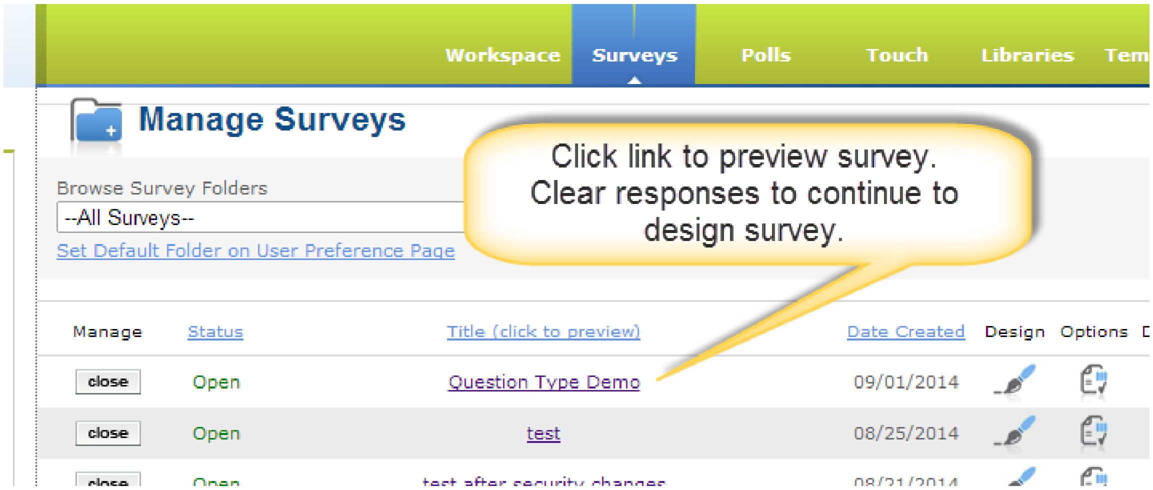


Preview Your Survey

Click **Preview** to see how the survey will actually appear to the users.



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



Set Survey Options

Before you deploy your survey you must select the **Survey Options.** These 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)*
- Security: Restricted to Owners or Public
- Language
- 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:

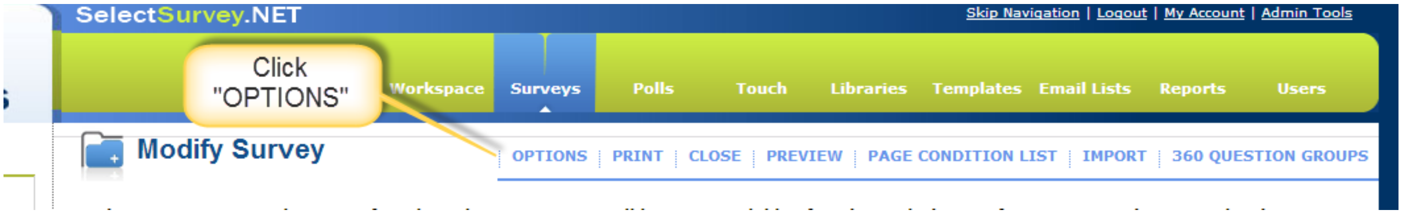
- Hidden Fields
- Dynamic Tokens
- Survey Review

Validation Tab:

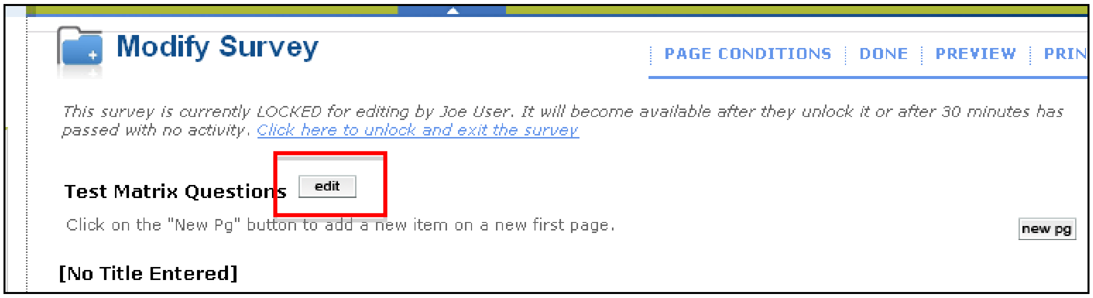
- Automatic test/fix for reporting issues

- Soft and Hard validation
    - o Soft – warns user before continuing
    - o Hard – Doesn't let user advance until completed

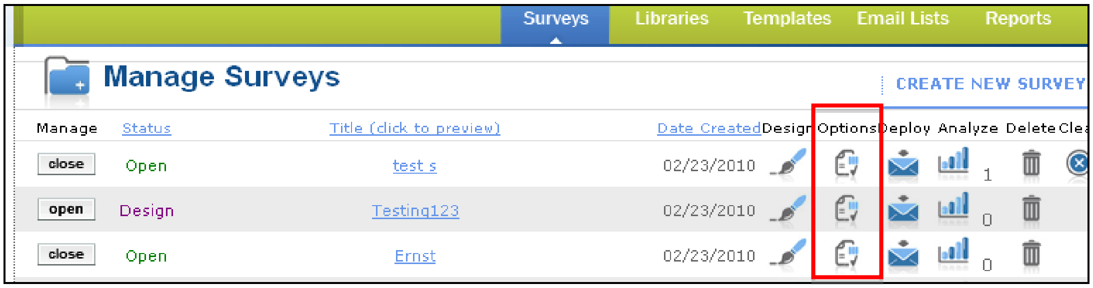
From the modify survey page you can click "OPTIONS" button to get to the survey options page.



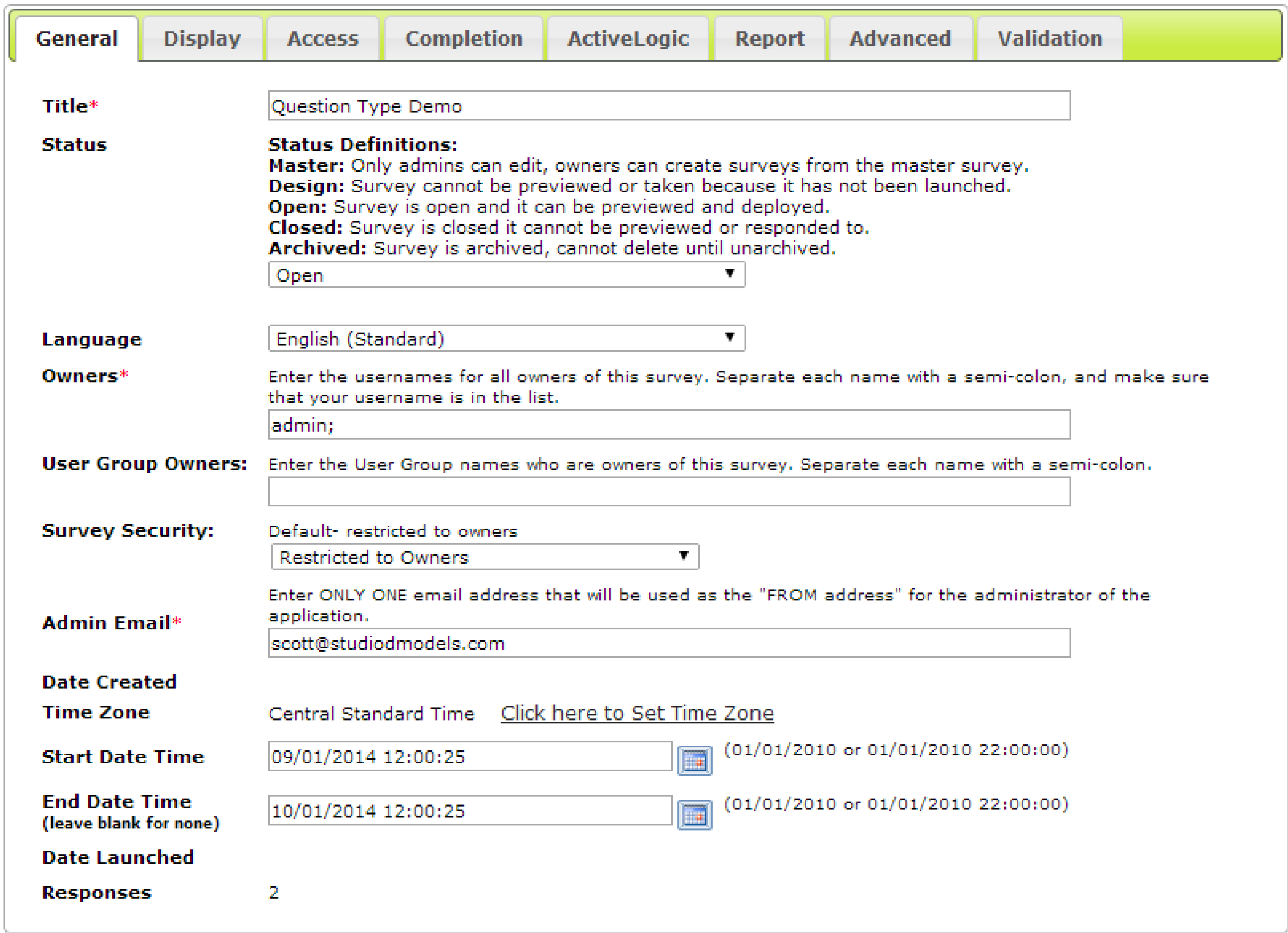
Or, you can get to the Survey Options page by clicking the **Edit** button next to the survey title when you are in **Design mode**.



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



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


General
Display
Access
Completion
ActiveLogic
Report
Advanced
Validation
Title*
Question Type Demo
Status
Status Definitions:
Master: Only admins can edit, owners can create surveys from the master survey.
Design: Survey cannot be previewed or taken because it has not been launched.
Open: Survey is open and it can be previewed and deployed.
Closed: Survey is closed it cannot be previewed or responded to.
Archived: Survey is archived, cannot delete until unarchived.
Open
Language
English (Standard)
Owners*
Enter the usernames for all owners of this survey. Separate each name with a semi-colon, and make sure that your username is in the list.
admin;
User Group Owners:
Enter the User Group names who are owners of this survey. Separate each name with a semi-colon.
Survey Security:
Default- restricted to owners
Restricted to Owners
Admin Email*
Enter ONLY ONE email address that will be used as the "FROM address" for the administrator of the application.
scott@studiodmodels.com
Date Created
Time Zone
Central Standard Time
Click here to Set Time Zone
Start Date Time
09/01/2014 12:00:25
(01/01/2010 or 01/01/2010 22:00:00)
End Date Time
(leave blank for none)
10/01/2014 12:00:25
(01/01/2010 or 01/01/2010 22:00:00)
Date Launched
Responses
2

Deploy Your Survey

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

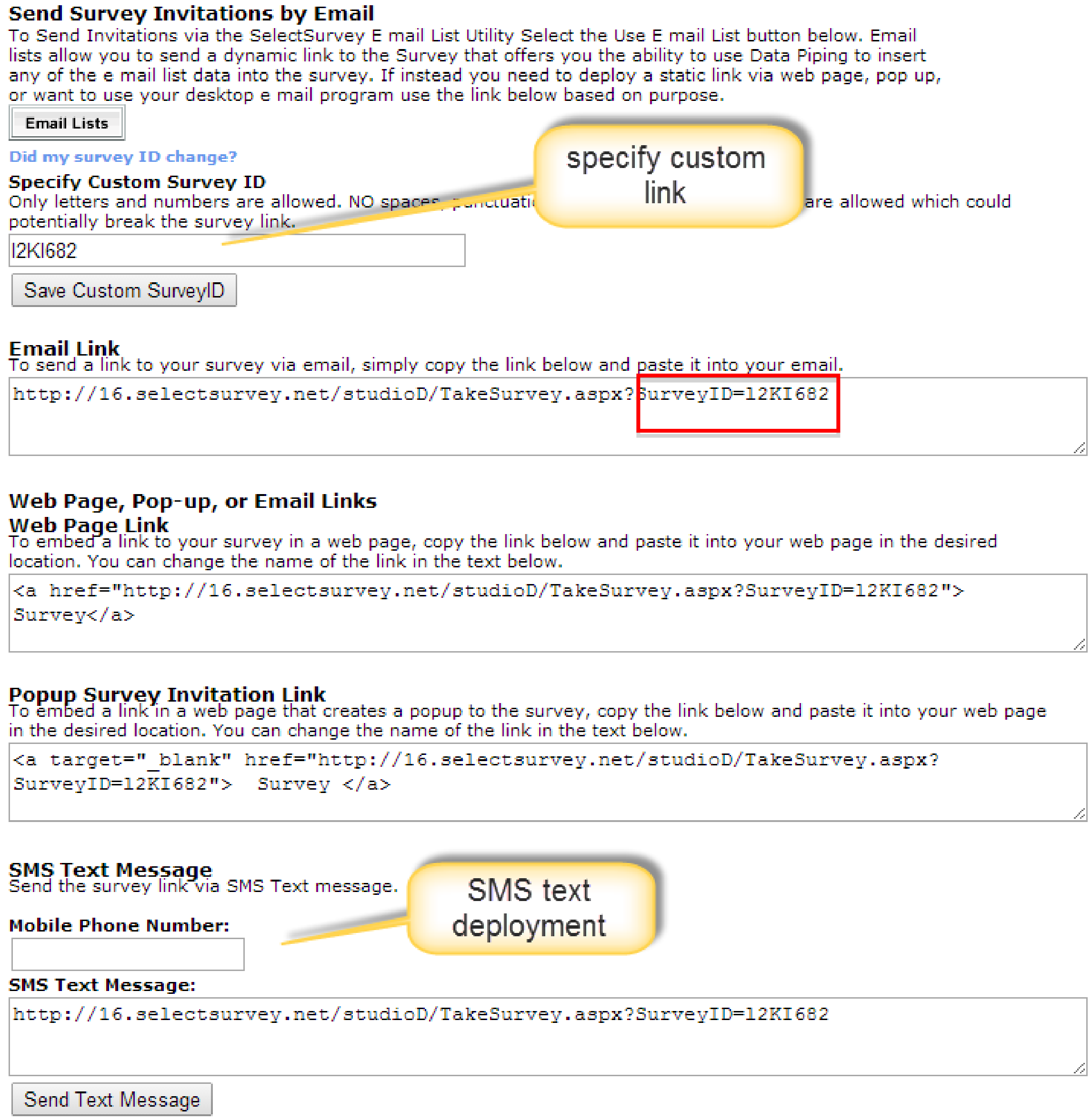
Click **Deploy** and copy the URL assigned to the survey (you'll notice the **Survey ID** within the URL)

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

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

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

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



Deploy Tiny URLs

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

URL REWRITER
Create a clean short URL.
Example:
http://yoururl.com/ClientName
instead of:
http://yoururl.com/TakeSurvey.aspx?SurveyID=123
Existing Custom URLs for this Survey:

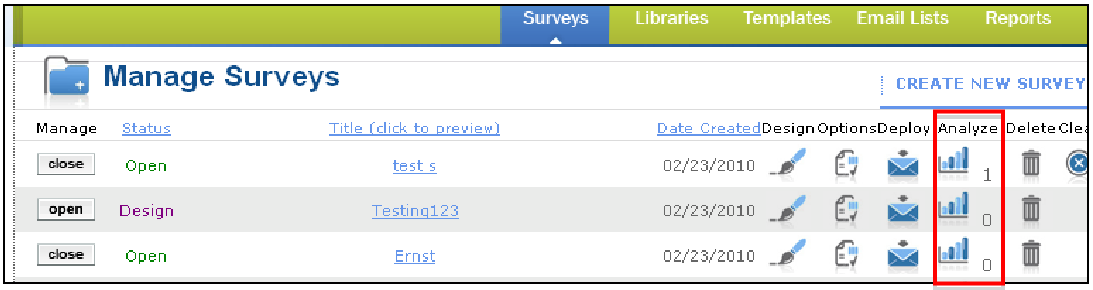
Route Name	Route URL	Route Physical File	Route Survey ID	Delete

You do not currently have any URL routes.

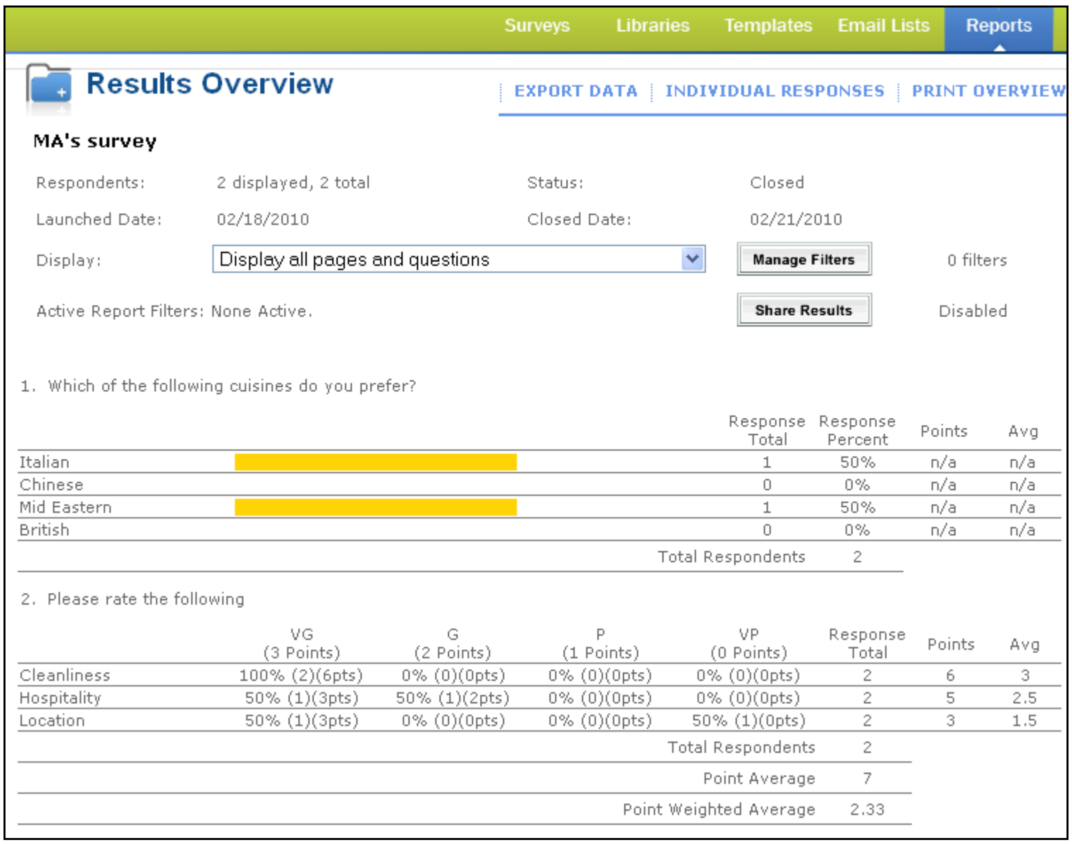
URL Shortcut Path Text:
No spaces, empty values or special characters allowed, this will be used in the URL path. Example:
http://yoururl.com/ClientName
http://yoururl.com/ [ ] Add URL Route

Monitor the Responses

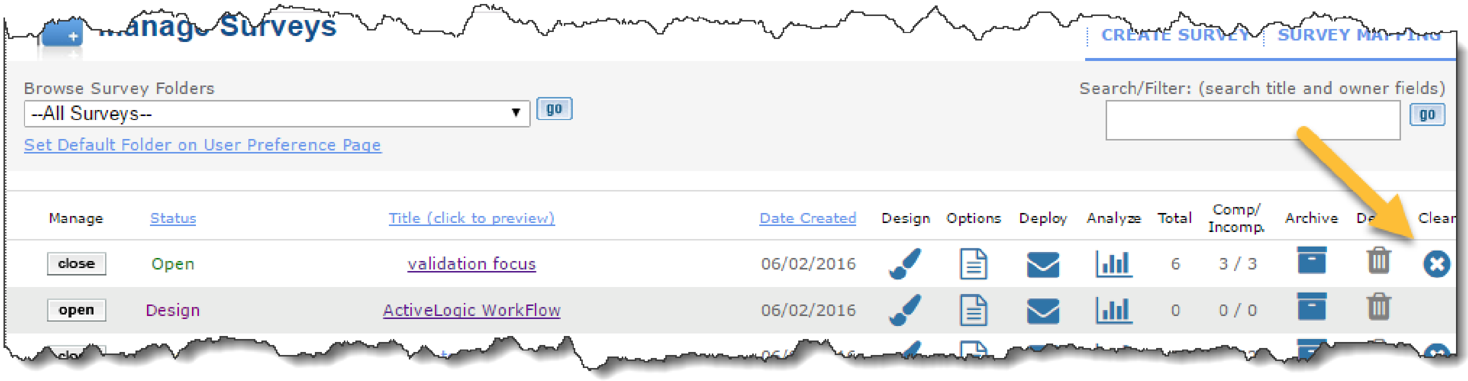
You can see the amount of responses on the **Manage Surveys** page.



Click **Analyze** at any time to see an overview of the results:



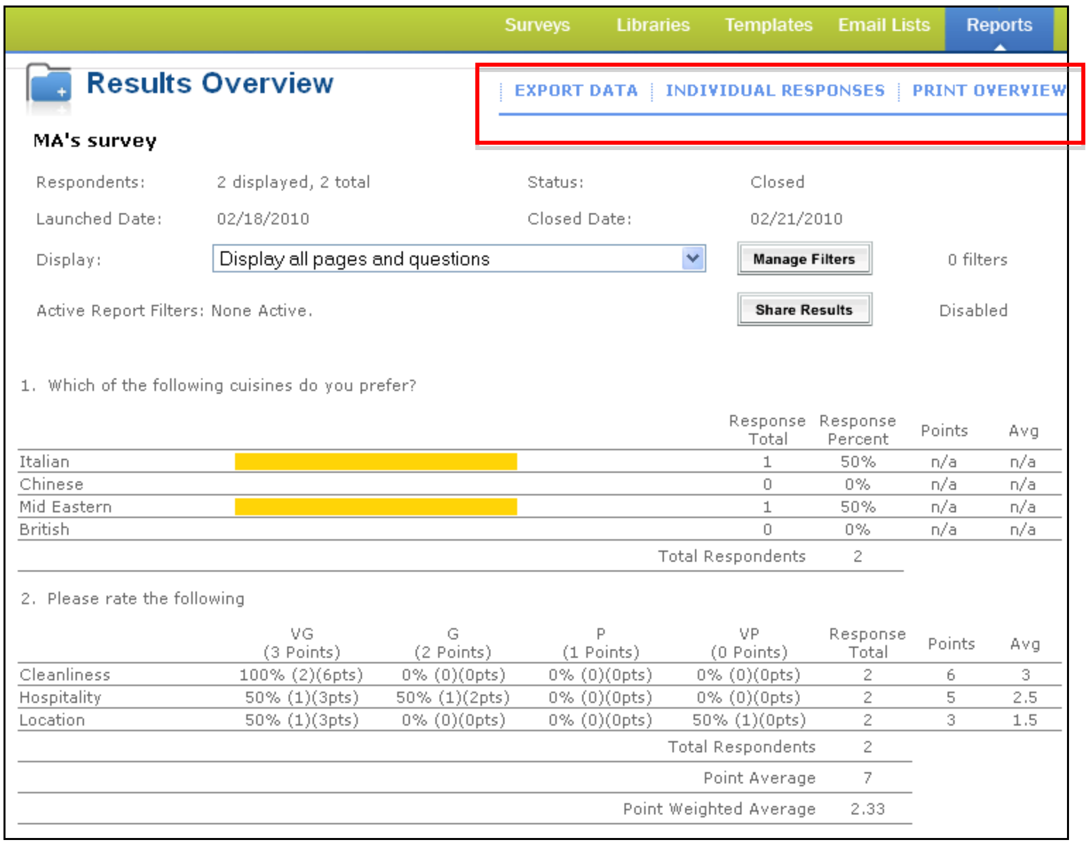
Clicking the button below PERMANENTLY deletes all responses for the survey.



Print or Export Data

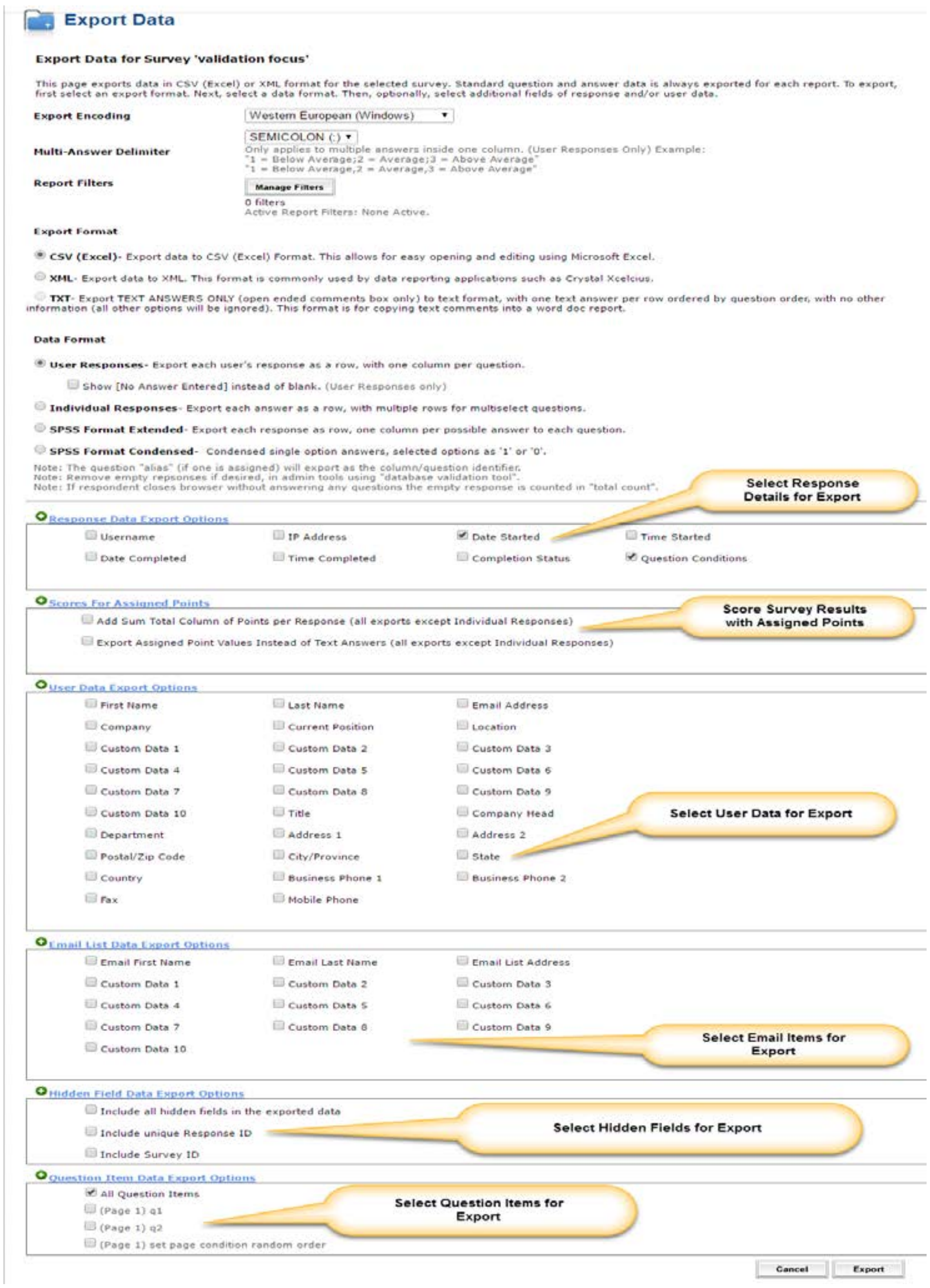
Click **Print Overview** to print the Results overview.

Click **Individual Responses** to scroll through each individual response. You can also print individual responses.



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**



Reports

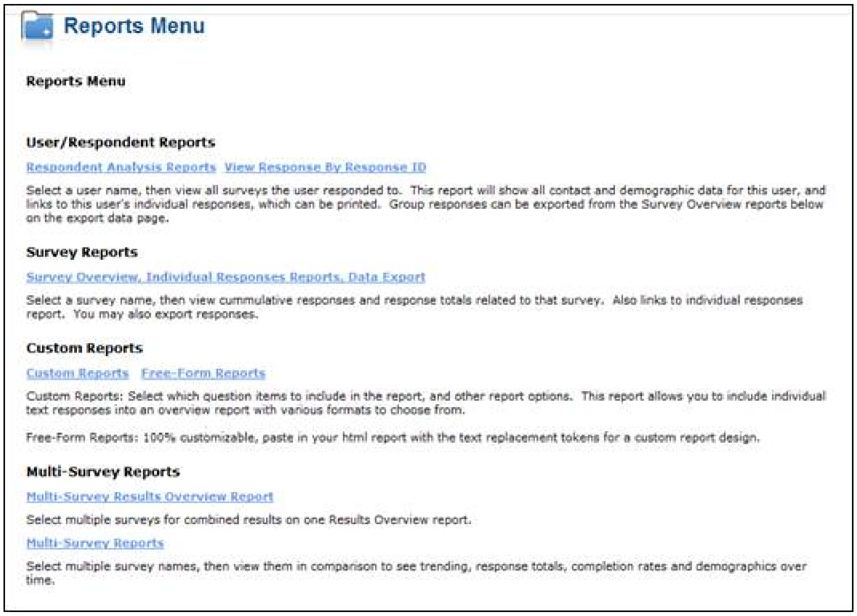
SelectSurvey provides several report generators on the **Reports Menu**, giving you an ability to generate a number of standard and custom reports, including:

- 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.

Getting to Reports Menu

• Click **Reports** (access from any page)



- Reports Menu opens listing the following options:

- User/Respondent Reports
    - Respondent Analysis Reports
    - View Response By Response ID
- Survey Reports
    - Survey Overview
    - Individual Responses Reports
    - Data Export
- Custom Reports
    - Custom Reports
    - Free-Form Reports
- Multi-Survey Reports
- Multi-Survey Results
- Overview Report

- Select required option and follow prompts.

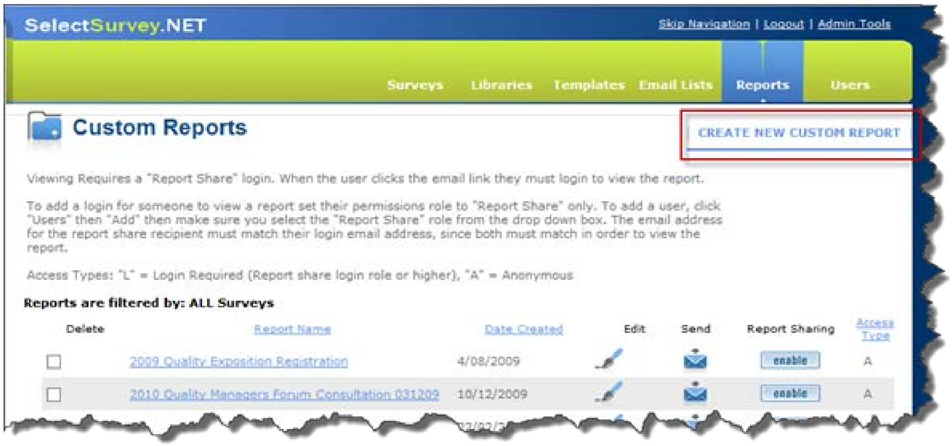
Custom Reports

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

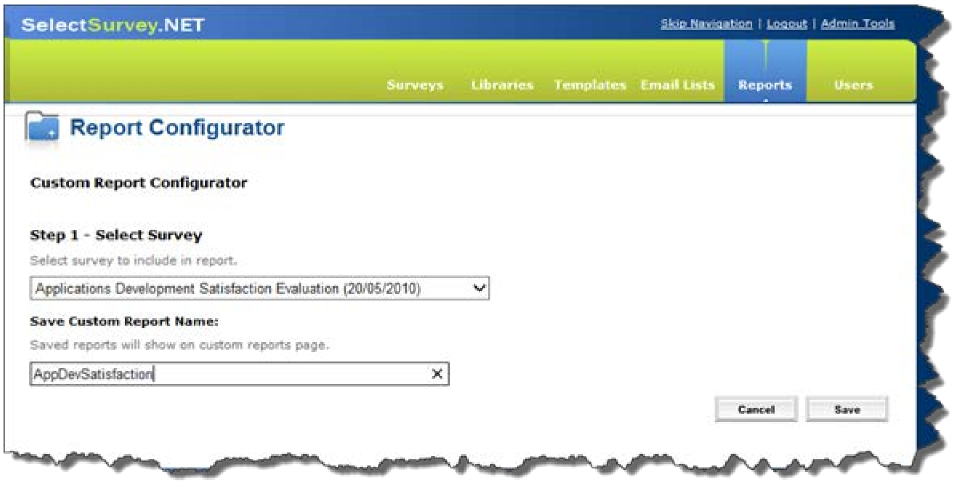
Custom reports also have html and PDF view/print options (2.0 .net framework or greater). You can save and edit custom report configurations and share the results with others. If you intend to share the results with others you must enable this feature first and then create a report share list.

Step 1 – Create the report

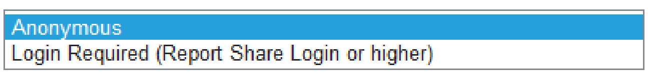
1. Click **Create New Custom Report** button to open **Report Configurator**



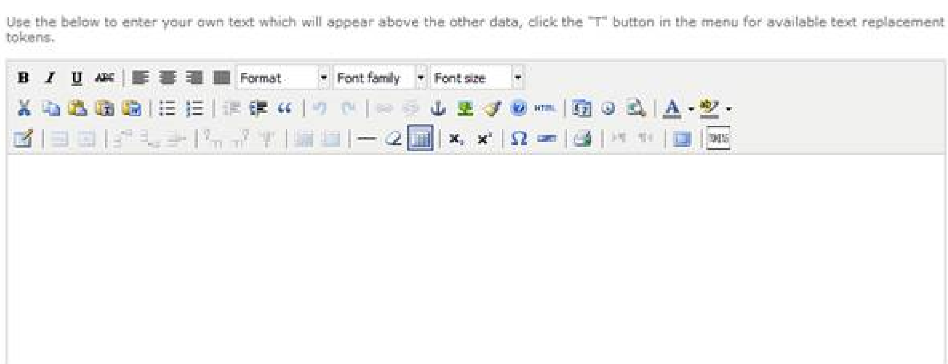
2. Select the survey from available surveys
3. Enter a name for the report (you can have multiple reports based on the same survey)
4. Click **Save**



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

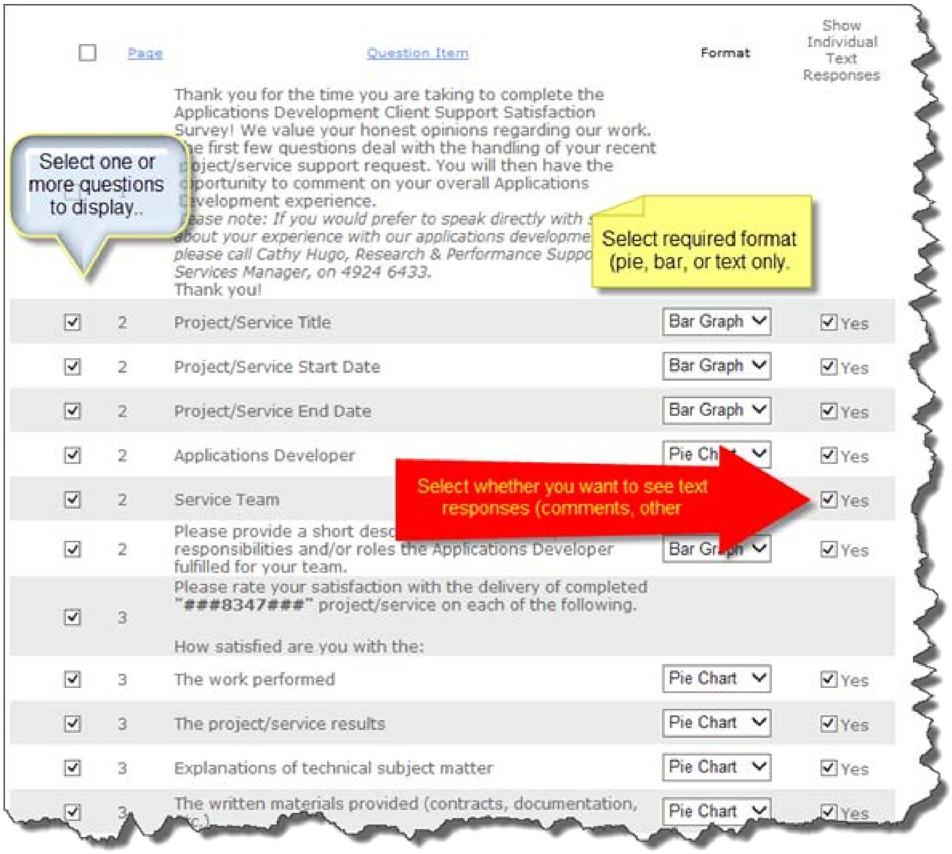


6. Add report Introduction (your own text which will appear above the other data)



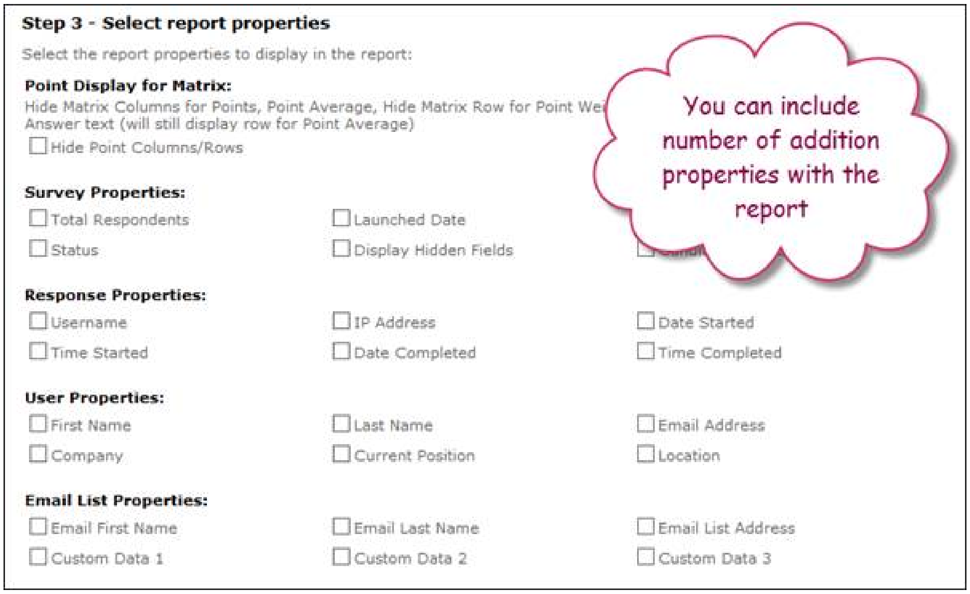
Step 2 - Select and format question items to include in report

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



Step 3 - Select report properties

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



Step 4 - Save report

Click **Save** button to save report.

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

Step 5 - Run the report

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

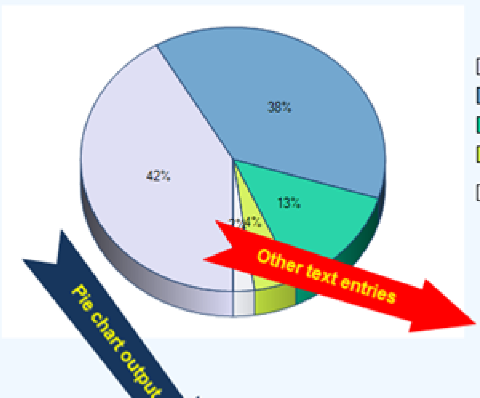
HNELHDSelectSurveyClientSatisfaction

Survey Title: HNELHD SelectSurvey Client Support Satisfaction Survey

Responses By Question Analysis:

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

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



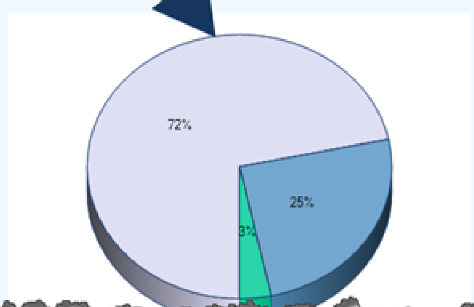
	Response Total	Response Percent
Email	37	73%
Phone	34	67%
Meet in person	12	24%
Use the website	4	8%
Other, please specify	2	4%
Total Respondents	**51**	
(skipped this question)	33	

use the help guide fo[...]vey select

Used the help manual extensively

Summary

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



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

Stephen told me to call John.

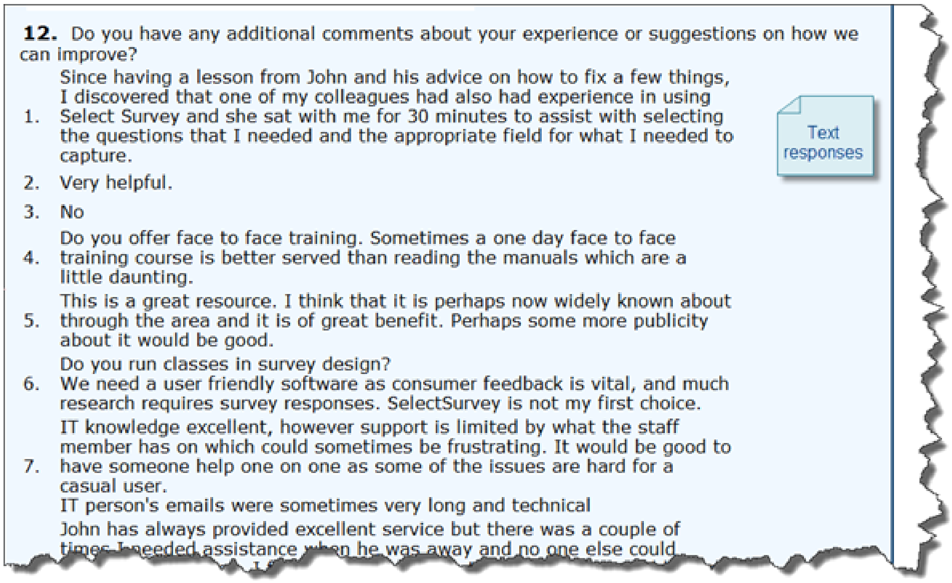
unsure

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

Bar chart options

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

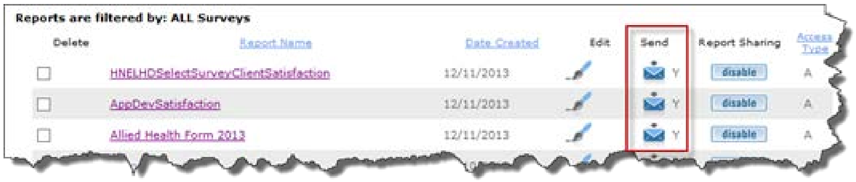
12. Do you have any additional comments about your experience or suggestions on how we can improve?


1. 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.
2. Very helpful.
3. No
4. 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.
5. 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.
6. 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.
7. 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

Step 6 – Share reports

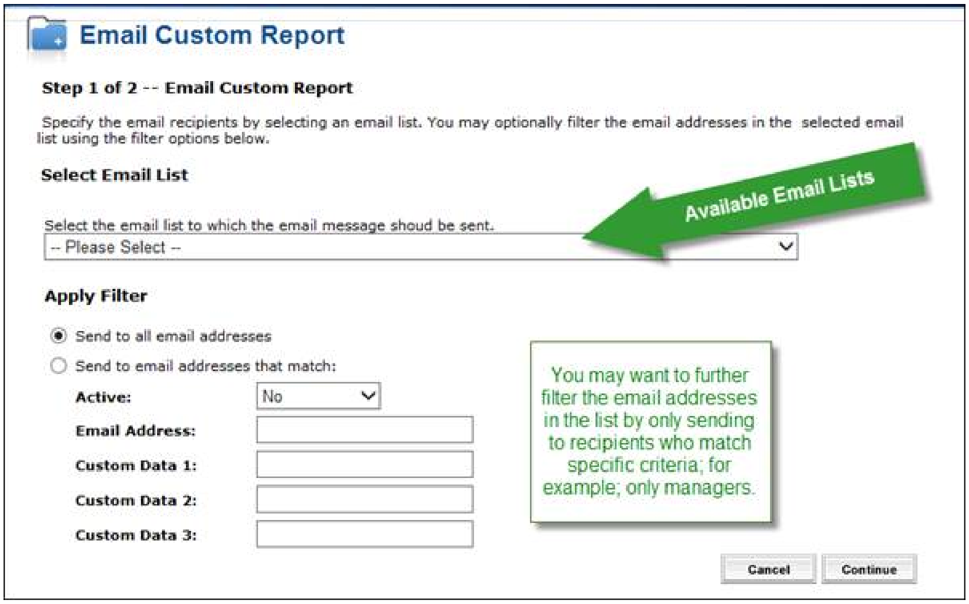
You can share produced reports with your colleagues by using saved email lists.

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

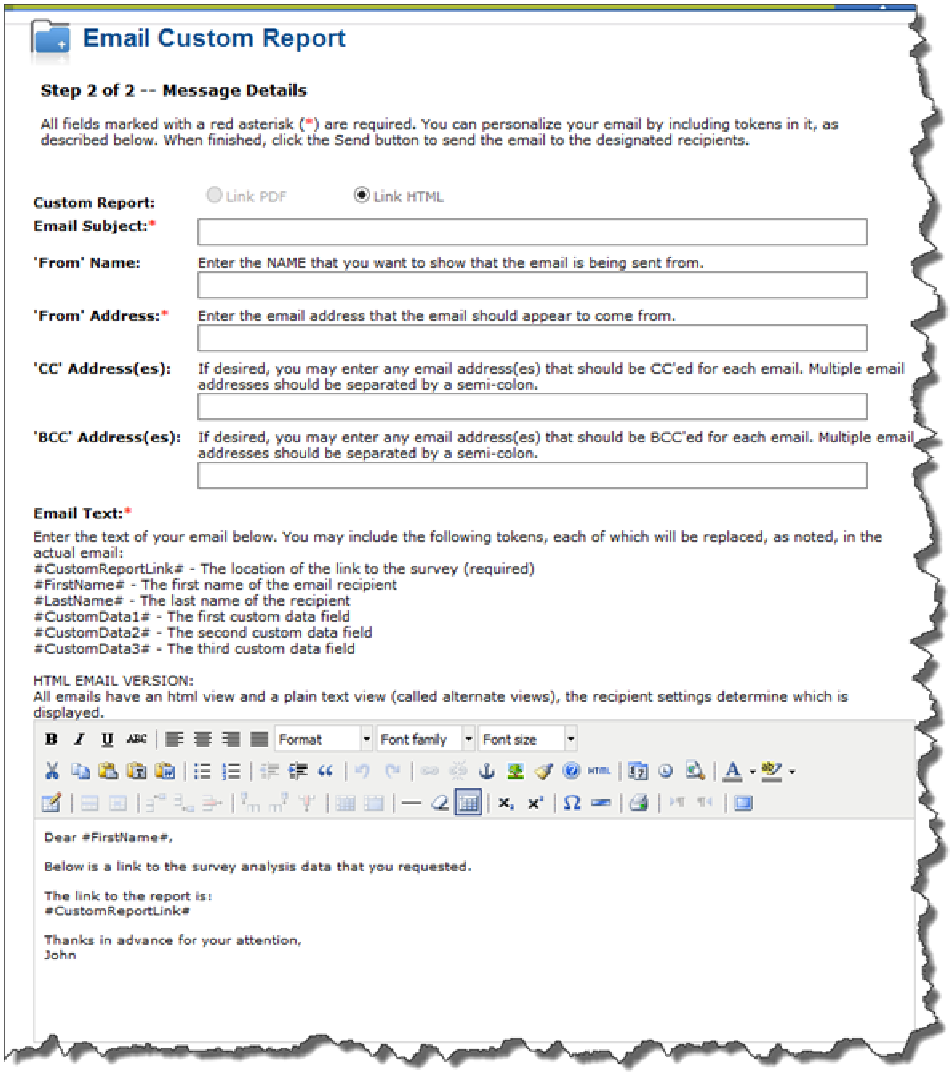

Reports are filtered by: ALL Surveys

Delete	Report Name	Date Created	Edit	Send	Report Sharing	Access Type
☐	HNELHDSelectSurveyClientSatisfaction	12/11/2013		Y	disable	A
☐	AppDevSatisfaction	12/11/2013		Y	disable	A
☐	Allied Health Form 2013	12/11/2013		Y	disable	A

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



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



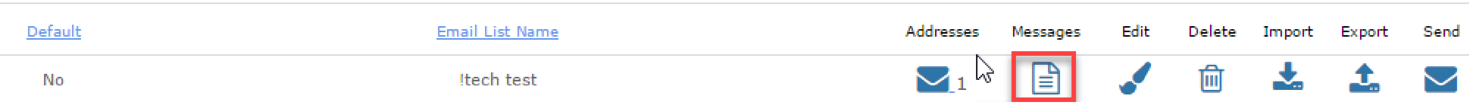
5. Click **Send** button to send the report to selected recipients.

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

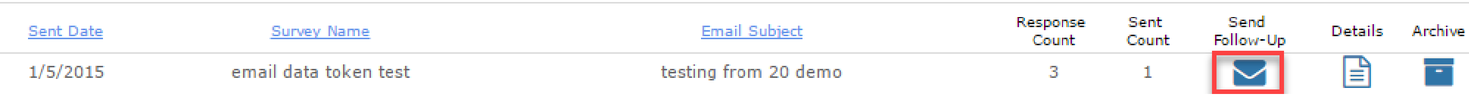
You can search for an email list by name using the search box shown below.

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

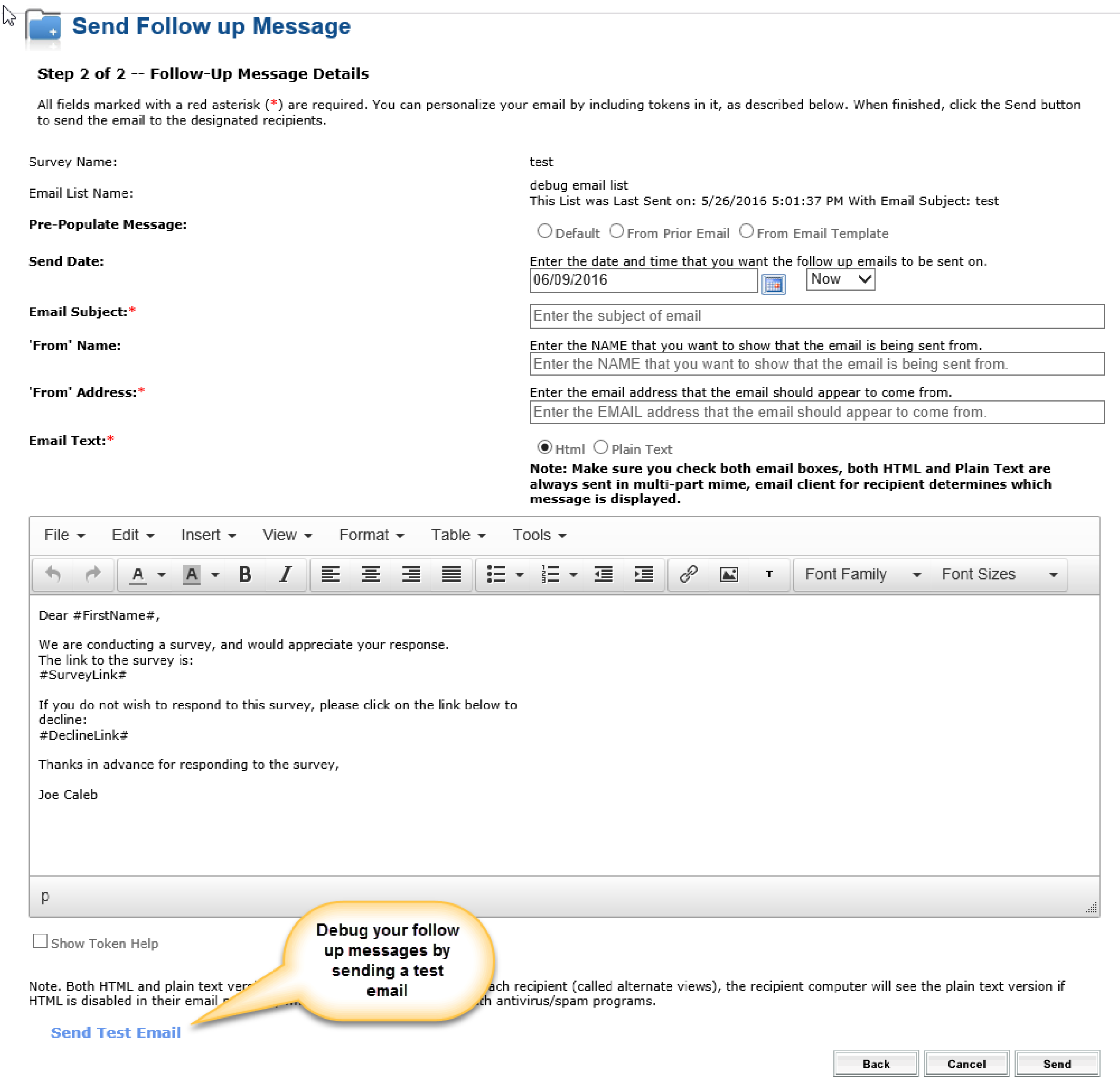
From the manage email list page, click the messages icon to view sent messages.



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



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



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 This List was Last Sent on: 5/26/2016 5:01:37 PM With Email Subject: test
Pre-Populate Message:	○ Default ○ From Prior Email ○ From Email Template
Send Date:	Enter the date and time that you want the follow up emails to be sent on. 06/09/2016 Now
Email Subject:*	Enter the subject of email
'From' Name:	Enter the NAME that you want to show that the email is being sent from. Enter the NAME that you want to show that the email is being sent from.
'From' Address:*	Enter the email address that the email should appear to come from. Enter the EMAIL address that the email should appear to come from.
Email Text:*	◉ Html ○ Plain Text **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.**

File Edit Insert View Format Table Tools

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 ver… ach recipient (called alternate views), the recipient computer will see the plain text version if HTML is disabled in their email … th 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
###RAD=SP###	Specific Practice Radar Chart
###GML=GP###	Generic Practice Final Levels Chart
###SML=SP###	Specific Practice Final Levels Chart
###PL=GP###	Generic Practice Response Breakdown Chart
###PL=SP###	Specific Practice Response Breakdown Chart
###SR=GAMP###	Response Breakdown Chart
###SR=ISO###	ISO Response Breakdown Chart

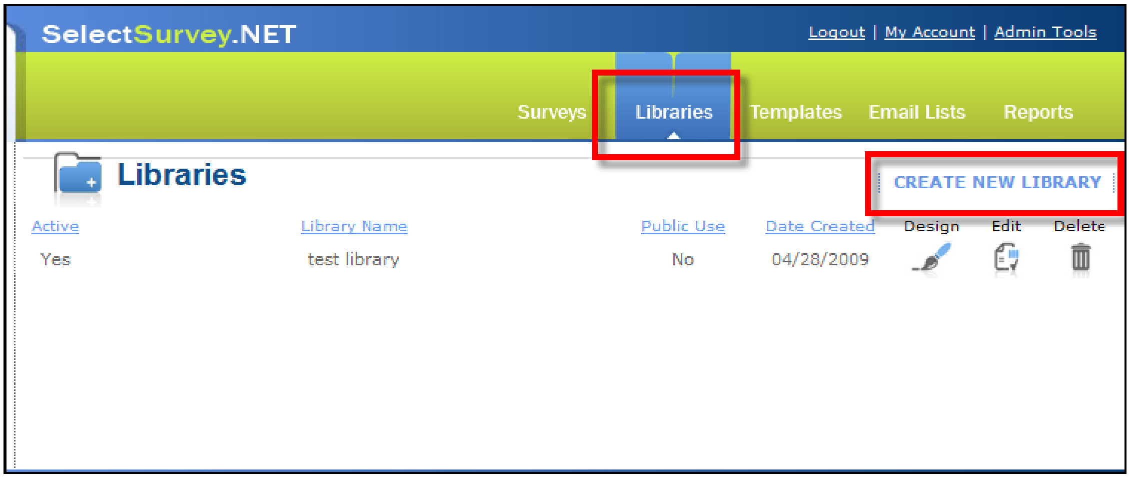
TOKEN	INDIVIDUAL VALUE DESCRIPTION
###SC=[see token menu]	Score Tokens
###SB=[see token menu]	Score Sub-Item Row Sum Tokens

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

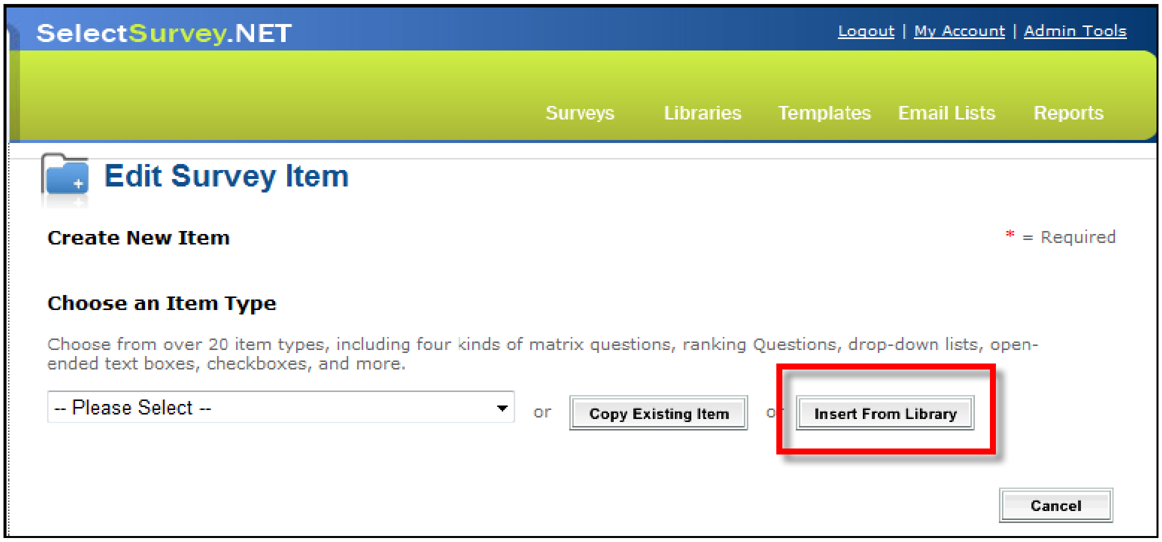
Keep a Library of Questions

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

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



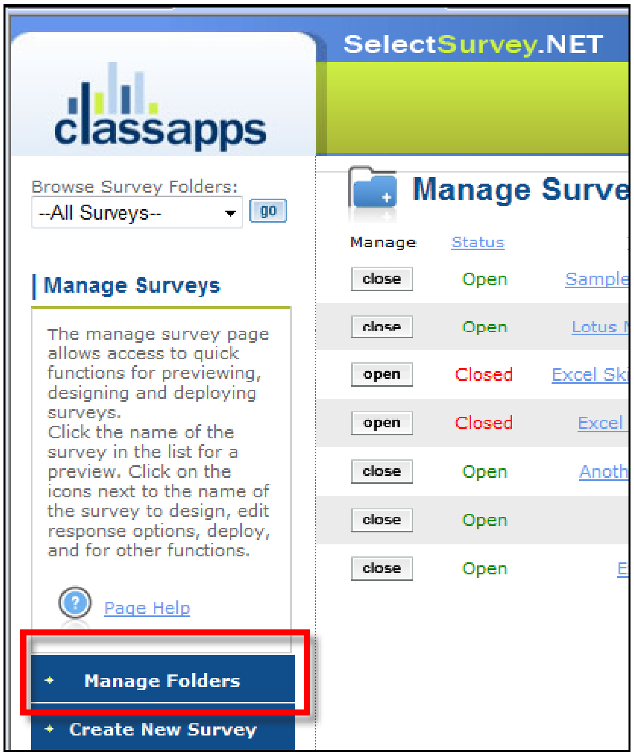
Now, when you are designing a survey click **Insert From Library** to select the question from the Library.



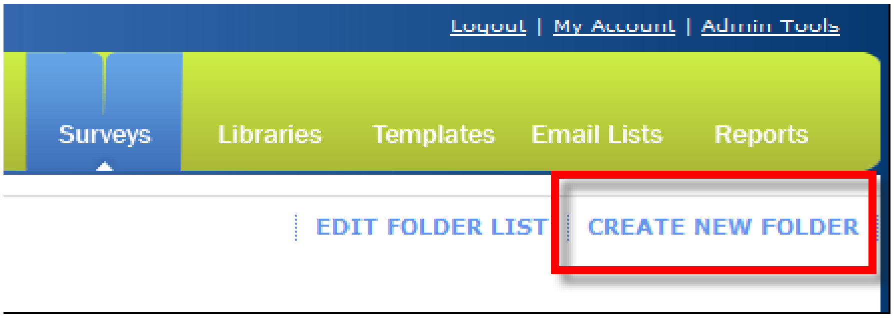
Organize Your Surveys into Folders

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

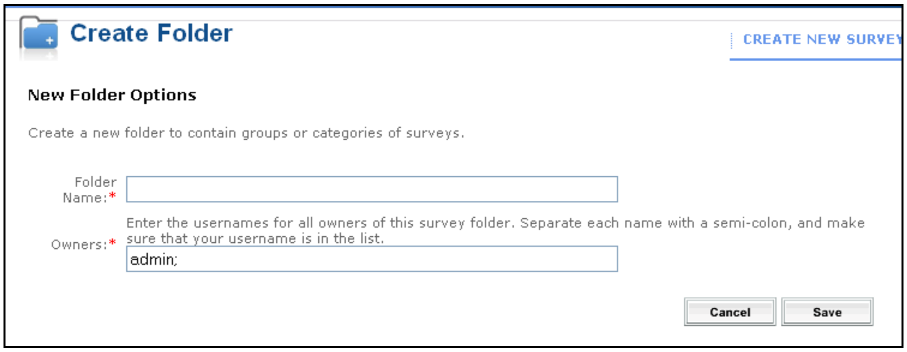
From the Manage Surveys page click **Manage Folders**



Click **Create New Folder**

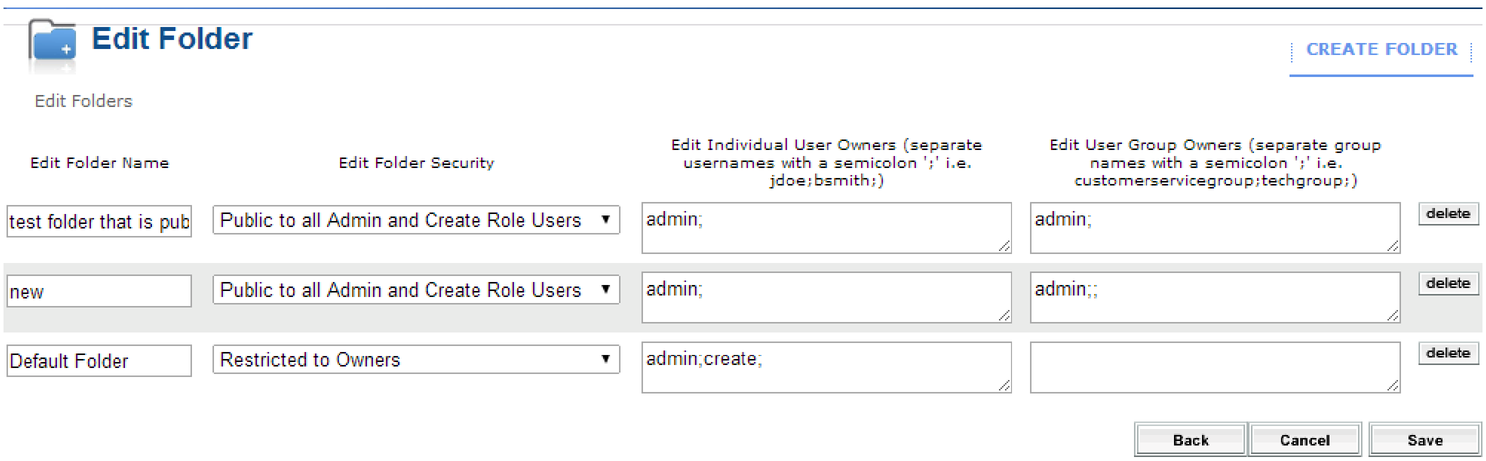


1. Enter the **Folder Name**
2. Click **Save**



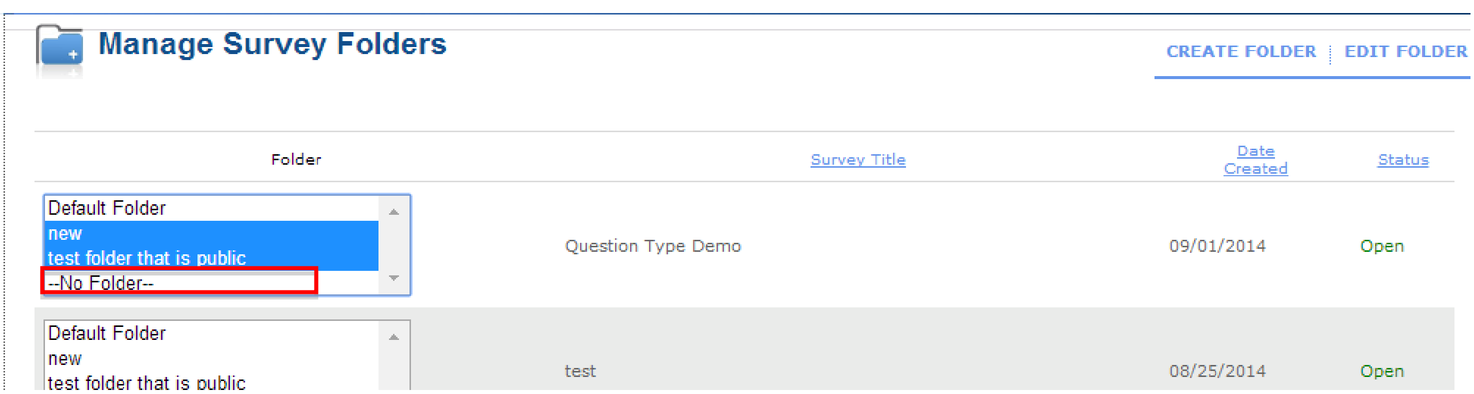
Click **Save** again.

Click “Edit Folder” to edit a folder:



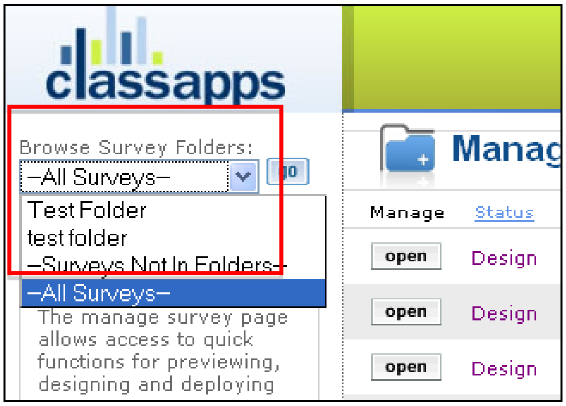
To add surveys to your new folder:

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



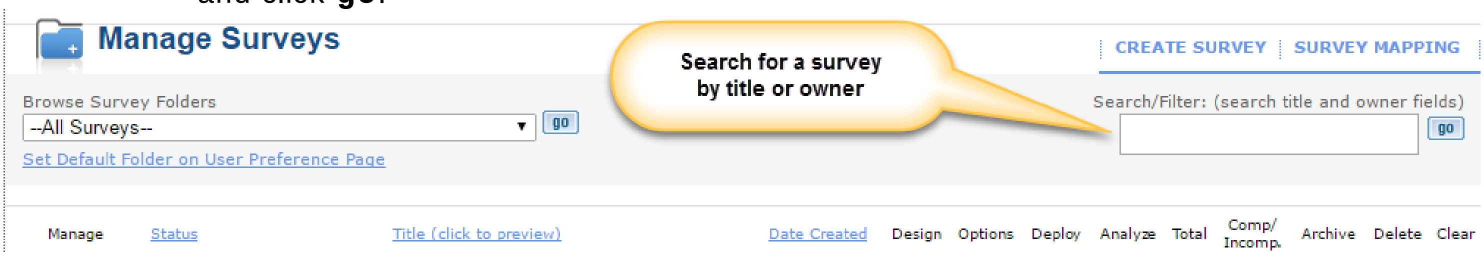
To access all surveys in a folder:

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



To search for a survey:

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



Logout

Remember to click Logout when you are finished.