



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.

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Course Outline

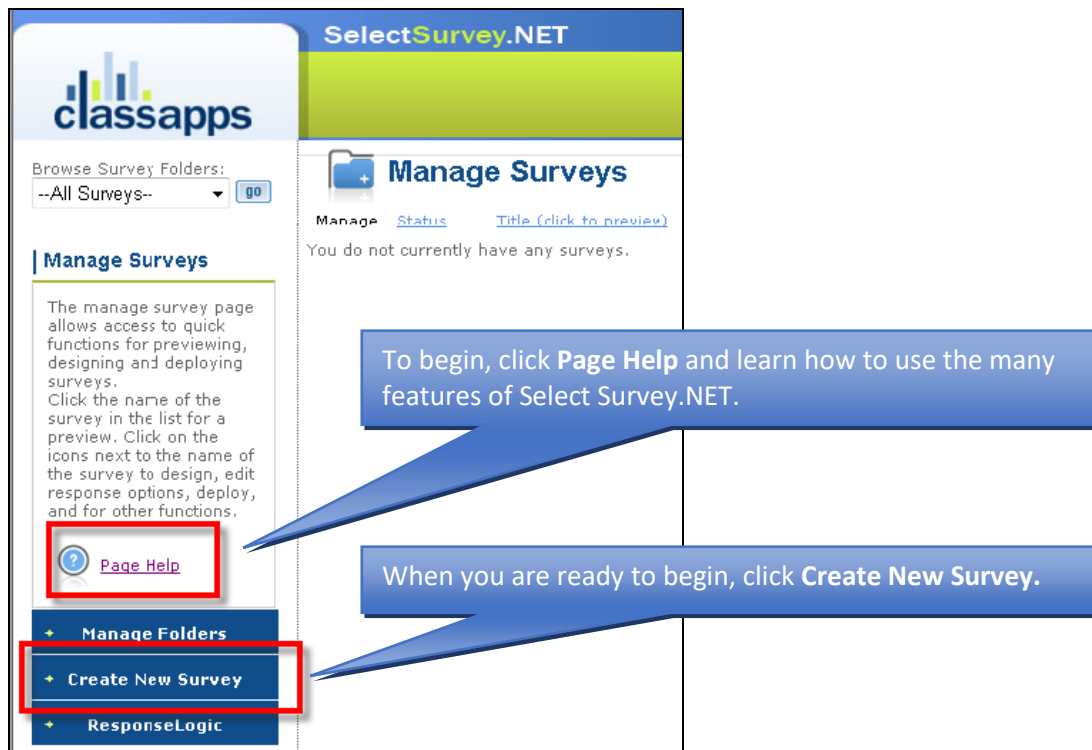
- Create a Survey from Scratch
- Choose Question Type
- Modify Survey
- Insert a New Question on a New Page
- Add Page Conditions
- Add Question Condition
- Preview Your Survey
- Set Survey Options
- Deploy Your Survey
- Monitor the Responses
- Print or Export Data
- Reports
- Share the Results with 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.



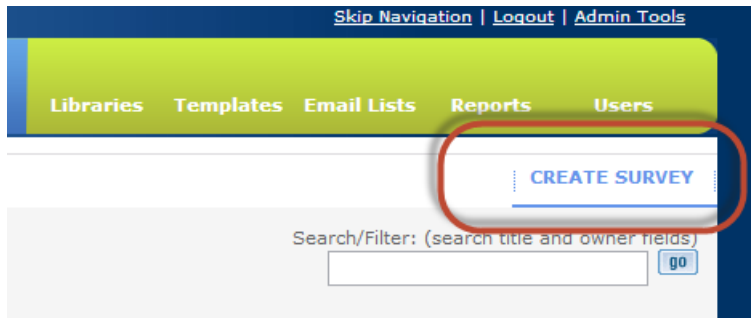
This is the Manage Surveys window. Eventually you will see all of your surveys listed here.



To begin, click **Page Help** and learn how to use the many features of Select Survey.NET.

When you are ready to begin, click **Create New Survey**.

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



- (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.



Modify Survey | PAGE CONDITIONS | DONE | PREVIEW | PRINT

This survey is currently LOCKED for editing by Kim Rant. 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](#)

Excel Skills Assessment

Click on the Insert button to add an item here.

Edit Survey Item

Create New Item * = Required

Choose an Item Type

Choose from over 20 item types, including four kinds of matrix questions, ranking Questions, drop-down lists, open-ended text boxes, checkboxes, and more.

-- Please Select -- or or

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

Edit Survey Item

Create New Item

Choose an Item Type

Choice - One Answer (Option Buttons)

Question

Enter the question.* Use this field to enter the text for your question.

What version of Excel are you using?

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

Type the question in the box.

Select whether an answer is Required.
Select **Horizontal** or **Vertical Alignment** of the answer choices.

Options

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

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

Answer alignment.* Select the way answers should be aligned on the page.
Horizontal

Answers

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

Select answer group (optional)

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

1	Excel 2003	<input type="radio"/> Default	<input type="text"/>	points
2	Excel 2007	<input type="radio"/> Default	<input type="text"/>	points
3		<input type="radio"/> Default	<input type="text"/>	points
4		<input type="radio"/> Default	<input type="text"/>	points
5		<input type="radio"/> Default	<input type="text"/>	points

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

Other, please specify

Additional answer input type. Select the type of control that should be used to for the additional answer.
Textbox

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:

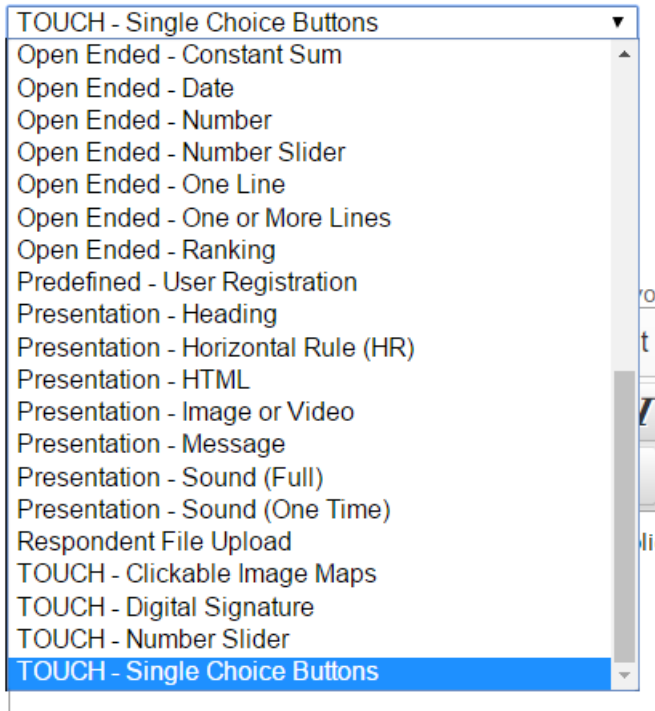
Question types that are specific to kiosk, ipad or touch screens. Note that all question types work on these devices, these are just specific to this presentation type.

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:

Choose an Item Type

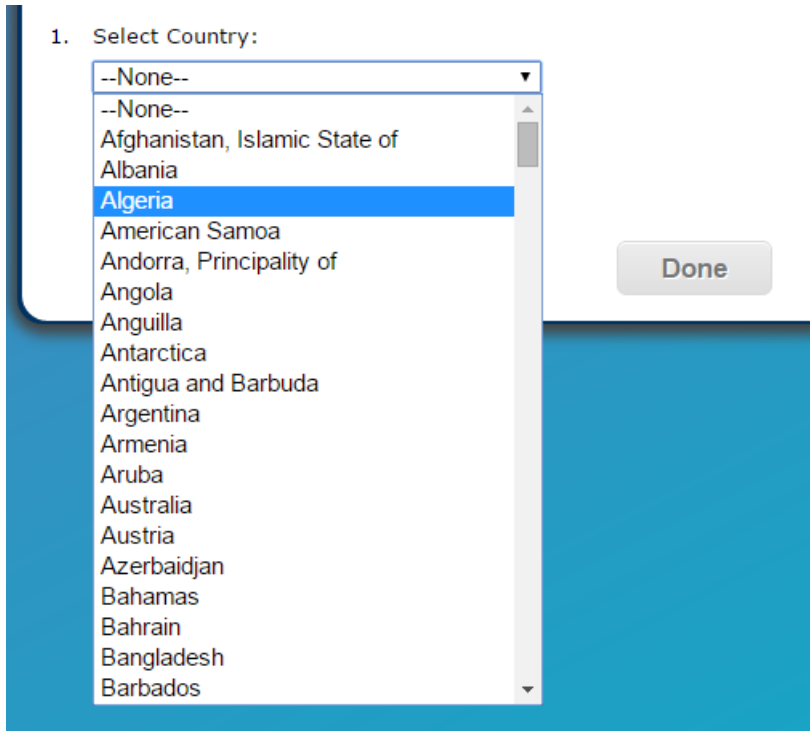
Choose from over 35 question item types, including auto s



- **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



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

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

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

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

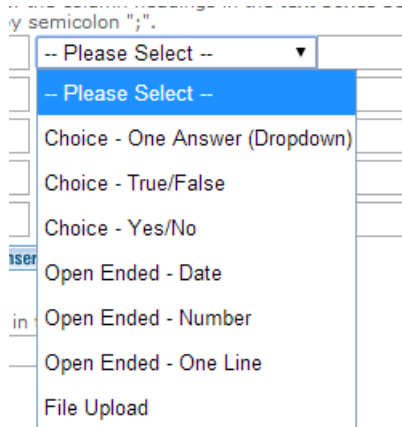
- **Matrix - Dynamic Row**

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
Row 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Row 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Row 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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.

by semicolon ";".

-- Please Select --

-- Please Select --

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 (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"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Matrix - Rating Scale (Numeric)**

Respondent can select only one radio button per row.

Example of "Matrix - Rating scale"

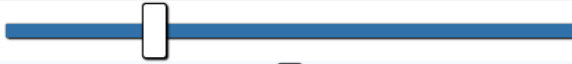


	1	2	3	4	5
Row1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Row3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>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

- 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.

1. Example of "Captcha" question type. Please enter captcha characters in box to continue.



- **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.

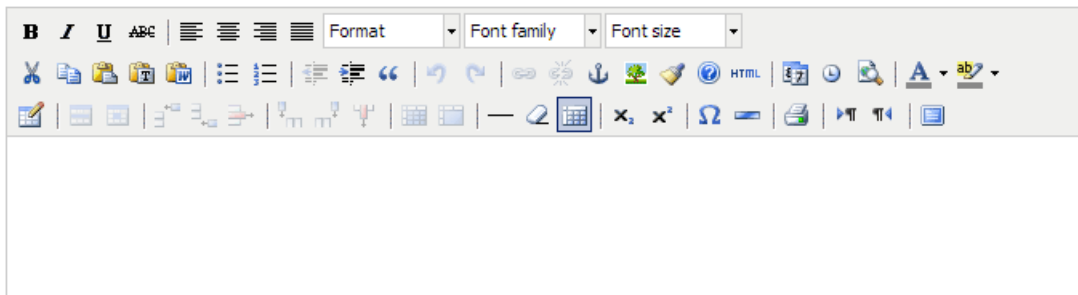
Respondent can fill this question type with bar code reader/scanner.

Plain text view:

5. Open Ended - Comments Box Example



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.

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



- **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.

6. 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.

7. 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

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

No file chosen

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.



- **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

400 KB

File Storage Location

File System

Show File Name and File Description Text Boxes for Respondent

No

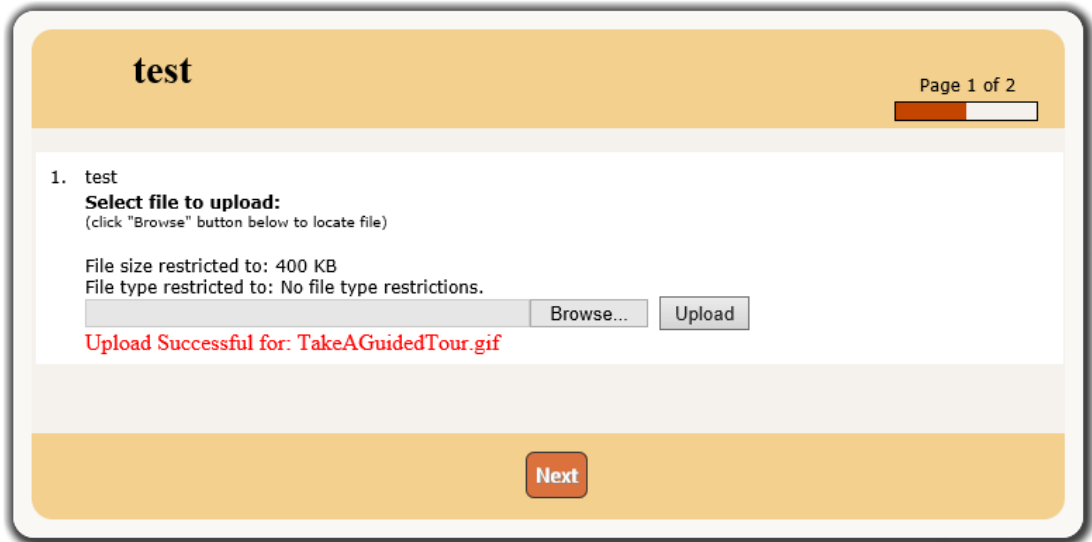
Select "Yes" to show the file name and file description text boxes, and "No" to hide them.

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

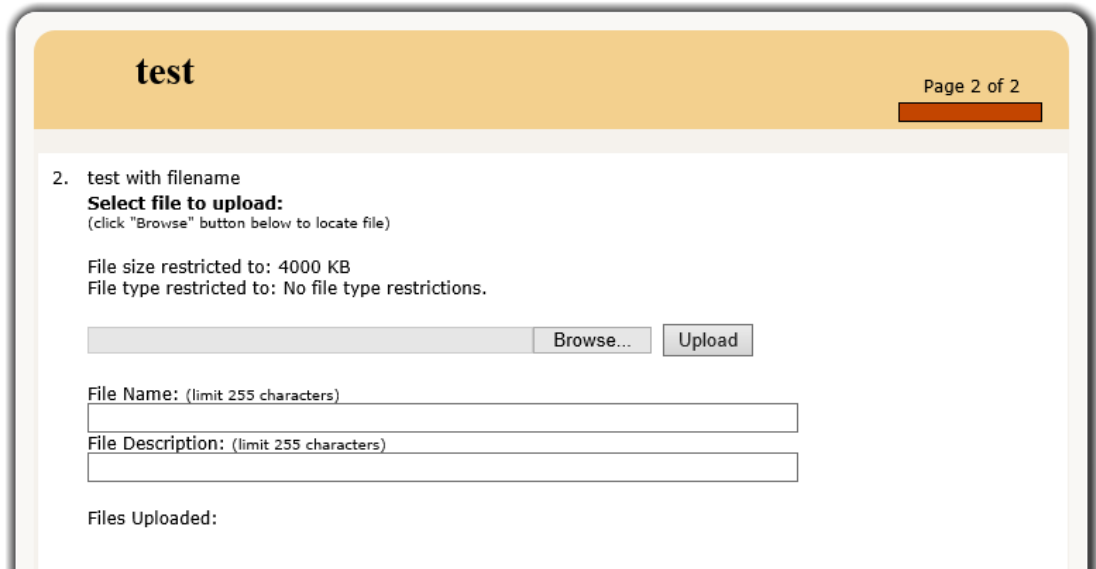
Save responses to this item. Check this box to save responses to this item.

Show in Take Review Survey

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.

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

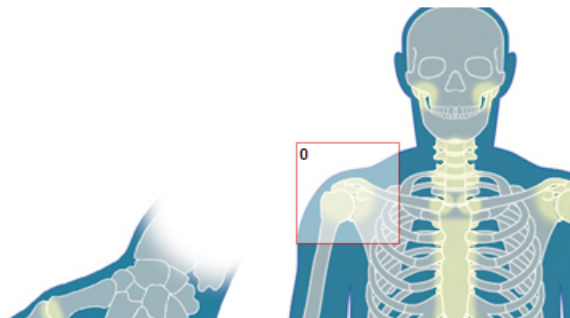
You can edit a custom map by clicking on one of the plotted points or a

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.

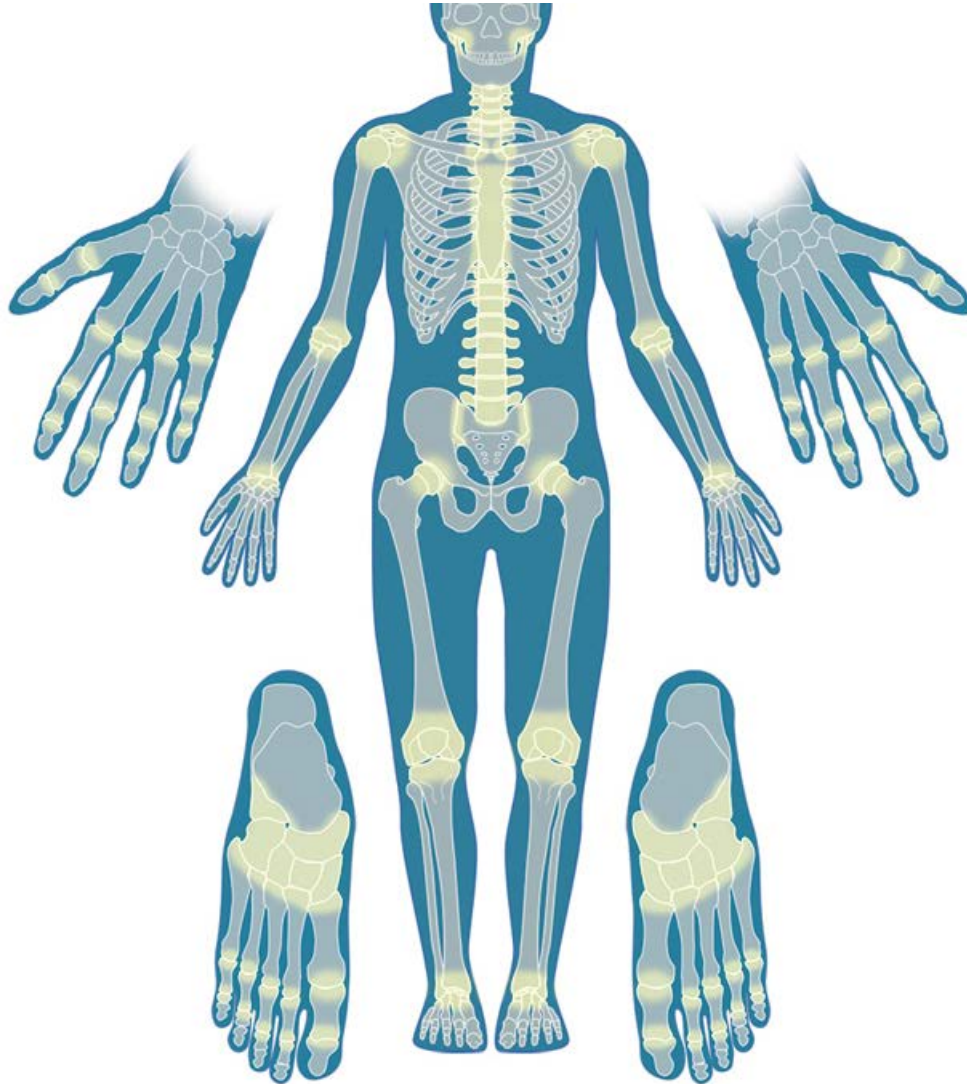
Zoom: 100% Output: Standard imagemap Fill:Outl

0	rectangle	Coords: 238,138,301,2	Href: javascript:void(0)	Alt: 0
1	rectangle	Coords:	Href: javascript:void(0)	Alt: 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:

new touch single choice buttons question type demo

Page 1 of 2

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

Very Significant

Significant

Neutral

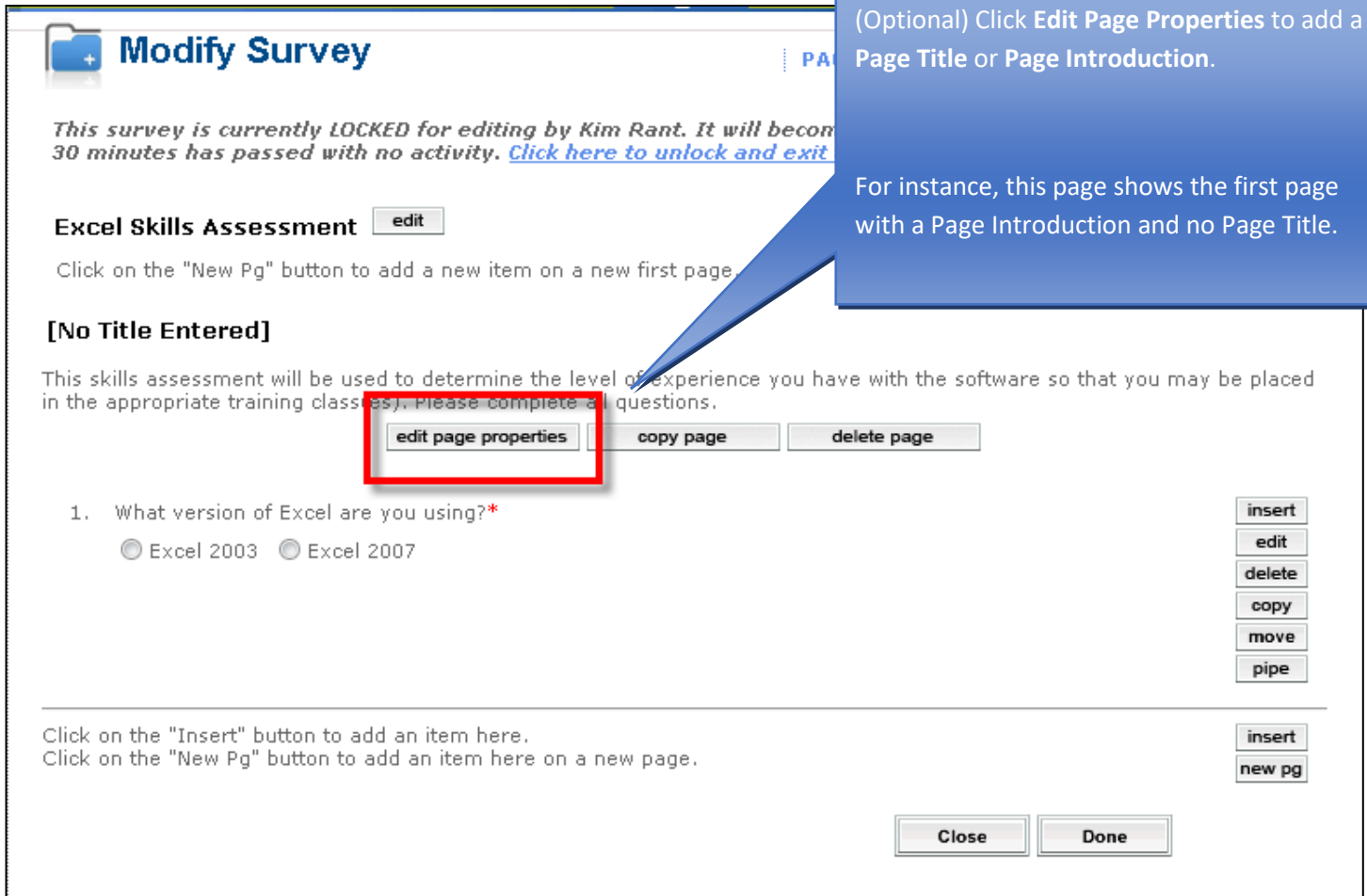
Insignificant

Very Insignificant

Next

Modify Survey

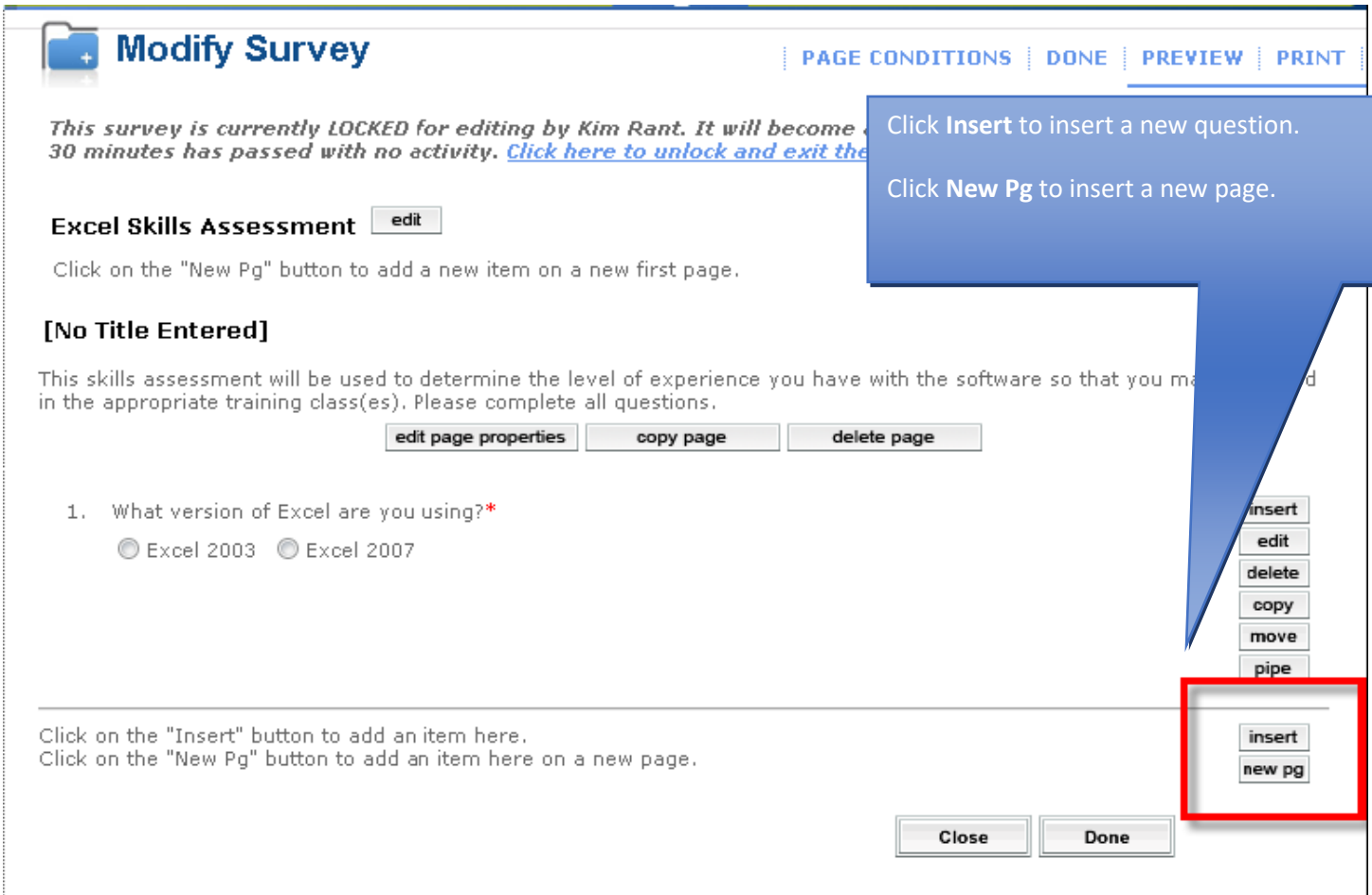
The **Modify Survey** page is displayed with the survey title and the first question.



The screenshot shows the 'Modify Survey' interface. At the top, there is a header with a folder icon and the title 'Modify Survey'. Below this, a message states: 'This survey is currently LOCKED for editing by Kim Rant. It will become available again in 30 minutes has passed with no activity. [Click here to unlock and exit](#).' The main content area is titled 'Excel Skills Assessment' with an 'edit' button. A note says: 'Click on the "New Pg" button to add a new item on a new first page.' Below this is a section '[No Title Entered]' with a description: 'This skills assessment will be used to determine the level of experience you have with the software so that you may be placed in the appropriate training class(es). Please complete all questions.' Three buttons are visible: 'edit page properties' (highlighted with a red box), 'copy page', and 'delete page'. A question is listed: '1. What version of Excel are you using?*' with radio buttons for 'Excel 2003' and 'Excel 2007'. On the right side, there is a vertical stack of buttons: 'insert', 'edit', 'delete', 'copy', 'move', and 'pipe'. At the bottom, there are instructions: 'Click on the "Insert" button to add an item here.' and 'Click on the "New Pg" button to add an item here on a new page.' with 'insert' and 'new pg' buttons. At the very bottom, there are 'Close' and 'Done' buttons. A blue callout box on the right contains the text: '(Optional) Click Edit Page Properties to add a Page Title or Page Introduction. For instance, this page shows the first page with a Page Introduction and no Page Title.'

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.



Modify Survey | PAGE CONDITIONS | DONE | PREVIEW | PRINT

This survey is currently LOCKED for editing by Kim Rant. It will become available again in 30 minutes has passed with no activity. [Click here to unlock and exit the survey.](#)

Excel Skills Assessment

Click on the "New Pg" button to add a new item on a new first page.

[No Title Entered]

This skills assessment will be used to determine the level of experience you have with the software so that you may be placed in the appropriate training class(es). Please complete all questions.

1. What version of Excel are you using?*

Excel 2003 Excel 2007

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.

Click Insert to insert a new question.

Click New Pg to insert a new page.

- 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

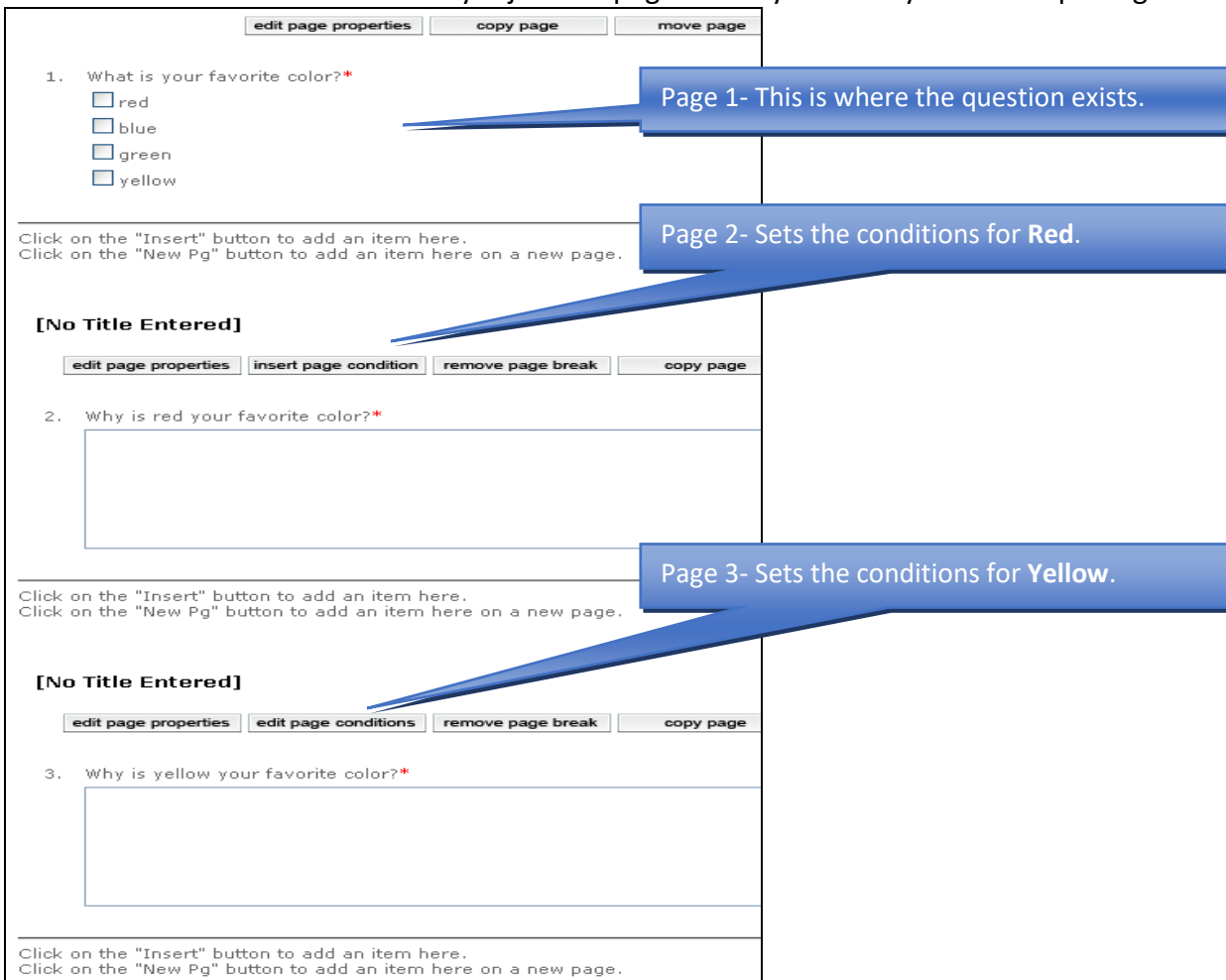
Add Page Conditions

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...."



The screenshot shows a sequence of three pages in a survey editor. Each page has a title bar with buttons: 'edit page properties', 'copy page', and 'move page'.

- Page 1:** Contains the question "1. What is your favorite color?*" with radio button options for red, blue, green, and yellow. A callout box points to this page with the text: "Page 1- This is where the question exists."
- Page 2:** Contains the question "2. Why is red your favorite color?*" with a text input field. The title bar includes an 'insert page condition' button. A callout box points to this page with the text: "Page 2- Sets the conditions for Red."
- Page 3:** Contains the question "3. Why is yellow your favorite color?*" with a text input field. The title bar includes an 'edit page conditions' button. A callout box points to this page with the text: "Page 3- Sets the conditions for Yellow."

Below each question is a footer with the text: "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."

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

Edit Page Condition

Manage Page Conditions * = Required

Page 2 of 'Test Matrix Questions' survey.

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.

Group	Question	Operator	Answer	Skip To	Actions
1	What is your favorite color?	=	red	No Skips	<input type="button" value="edit"/> <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 answer in the form below. Note that the Provided and Did Not Provide operators do not require an answer.

Question:*

Operator:*

Answer:*

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.

(1) First, select the conditions here. This is determining to "only display this page if the person's answer to this question equals this."

(2) Next, click the **Save** button and it places the condition here. Then just click **Done**. (You can save more than one condition for this page)

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.

ge 2 All Pages

matrix text in numbers edit

Click on the "New Pg" button to add a new item on a new first page. new pg

[No Title Entered]

edit page properties insert page condition copy page move page delete page

1. Question condition example

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

insert
insert cond.
edit
delete
copy
move
pipe

You can add multiple question conditions to a single question.

Question Conditions

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

Question condition example

Trigger conditions on

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

Update

Conditional Question(s)

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

Why did you click "agree"?

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

200 x

Save

Back

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.



The screenshot shows a form with two questions. Question 1 is "Do you work in Kansas City?" with a dropdown menu currently set to "--None--". Question 2 is "Select Kansas City locations where you have worked:" with five checkboxes labeled Office A through Office E. To the right of each question is a vertical menu of action buttons: insert, hide cond., edit, delete, copy, move, and pipe. A yellow callout box with the text "Click 'hide cond.' button" has a line pointing to the "hide cond." button in the second menu, which is also highlighted with a red box.

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

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 condition hide conditions, use a single group number.

Edit	HideItemID	Group	Question or Token	Operator	Answer	Row	Condition
edit	455	1	Do you work in Kansas City?	=			Yes

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. No Provided and Did Not Provide operators do not require an answer.

Edit Question Hide Condition

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

Create Question Hide Condition based on Question Answer OR Token

Hidden Field data, Email List Data, User Data, all Non-Question Tokens, and all other data items will show up if you have points for this question.

Token: OR

Question:
Note: Keep in mind that only questions prior to this question should be selected.

Operator:*

Answer:*

Row: (matrix only)

Group:

Select triggering question

Select triggering answer

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

1. Do you work in Kansas City?

2. Select Kansas City locations where you have worked:

- Office A
- Office B
- Office C
- Office D
- Office E

insert

hide cond. **hide cond.**

edit

delete

copy

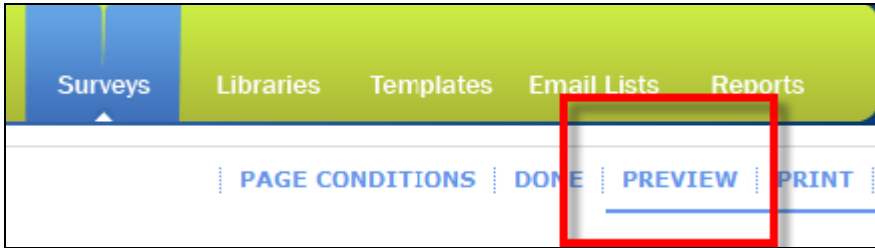
move

pipe

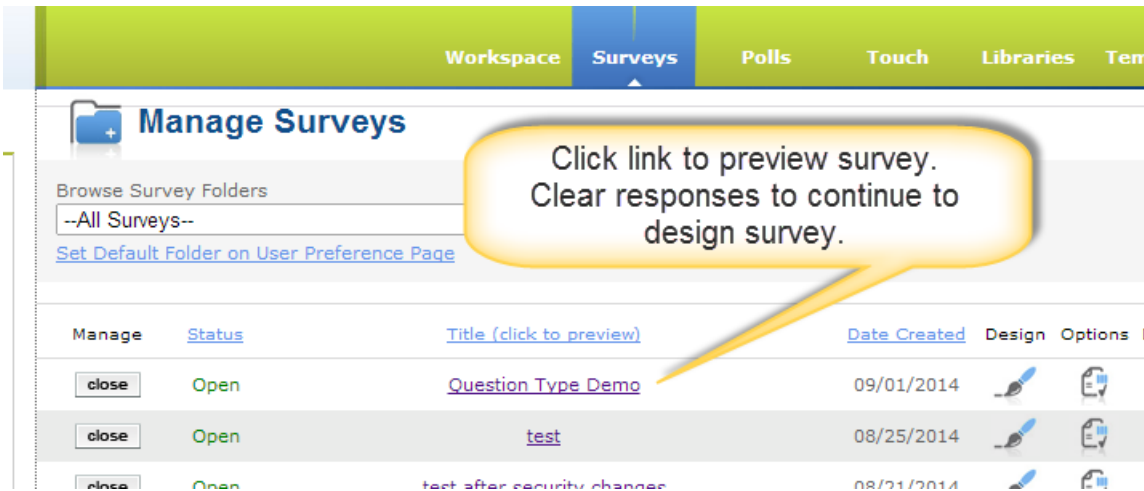
If a hide condition exists, the button will be highlighted in yellow.

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:

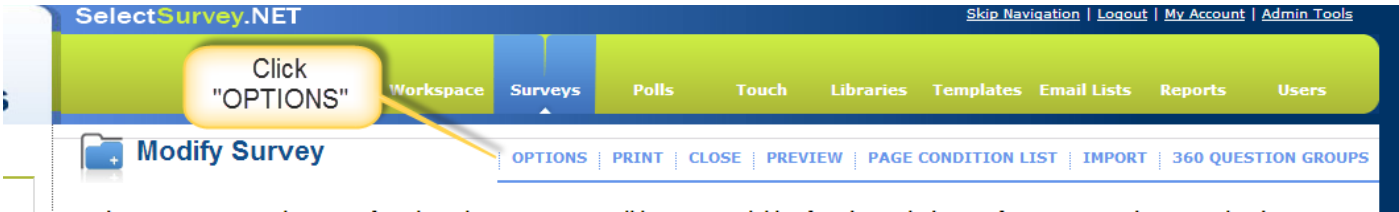
- Hidden Fields
- Dynamic Tokens
- Survey Review

Validation Tab:

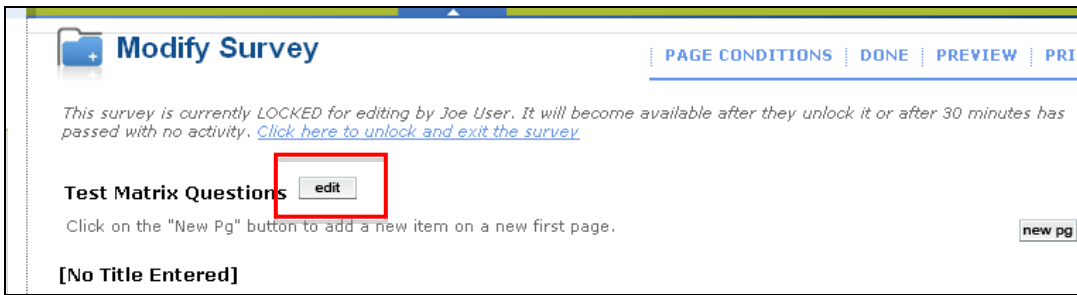
- Automatic test/fix for reporting issues

- Soft and Hard validation
 - 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.





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*	<input type="text" value="Question Type Demo"/>						
Status	<p>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.</p>						
	<input type="text" value="Open"/>						
Language	<input type="text" value="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.						
	<input type="text" value="admin;"/>						
User Group Owners:	Enter the User Group names who are owners of this survey. Separate each name with a semi-colon.						
	<input type="text"/>						
Survey Security:	Default- restricted to owners						
	<input type="text" value="Restricted to Owners"/>						
Admin Email*	Enter ONLY ONE email address that will be used as the "FROM address" for the administrator of the application.						
	<input type="text" value="scott@studiodmodels.com"/>						
Date Created							
Time Zone	Central Standard Time Click here to Set Time Zone						
Start Date Time	<input type="text" value="09/01/2014 12:00:25"/>  (01/01/2010 or 01/01/2010 22:00:00)						
End Date Time (leave blank for none)	<input type="text" value="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"

Send Survey Invitations by Email

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

Email Lists

Did my survey ID change?

Specify Custom Survey ID

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

12KI682

Save Custom SurveyID

specify custom link

Email Link

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

<http://16.selectsurvey.net/studioD/TakeSurvey.aspx?SurveyID=12KI682>

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.

```
<a href="http://16.selectsurvey.net/studioD/TakeSurvey.aspx?SurveyID=12KI682">
Survey</a>
```

Popup Survey Invitation Link

To embed a link in a web page that creates a popup to the survey, 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.

```
<a target="_blank" href="http://16.selectsurvey.net/studioD/TakeSurvey.aspx?
SurveyID=12KI682"> Survey </a>
```

SMS Text Message

Send the survey link via SMS Text message.

Mobile Phone Number:

SMS Text Message:

<http://16.selectsurvey.net/studioD/TakeSurvey.aspx?SurveyID=12KI682>

Send Text Message

SMS text deployment

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

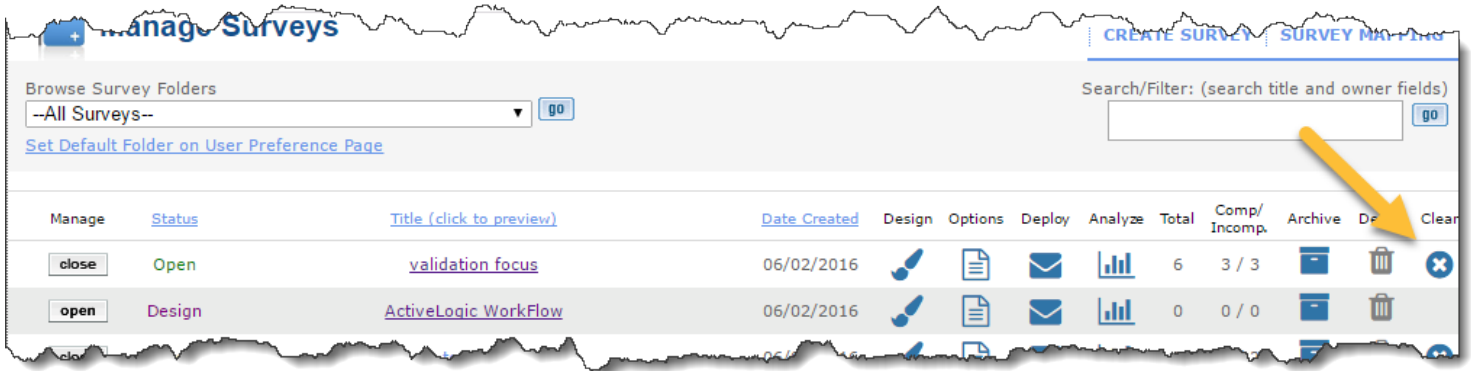
You can see the amount of responses on the **Manage Surveys** page.

Surveys Libraries Templates Email Lists Reports									
Manage Surveys									
Manage	Status	Title (click to preview)	Date Created	Design	Options	Deploy	Analyze	Delete	Clear
close	Open	test s	02/23/2010				1		
open	Design	Testing123	02/23/2010				0		
close	Open	Ernst	02/23/2010				0		

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

Surveys Libraries Templates Email Lists Reports									
Results Overview									
EXPORT DATA INDIVIDUAL RESPONSES PRINT OVERVIEW									
MA's survey									
Respondents:	2 displayed, 2 total			Status:	Closed				
Launched Date:	02/18/2010			Closed Date:	02/21/2010				
Display:	Display all pages and questions			Manage Filters	0 filters				
Active Report Filters:	None Active.			Share Results	Disabled				
1. Which of the following cuisines do you prefer?									
				Response Total	Response Percent	Points	Avg		
Italian				1	50%	n/a	n/a		
Chinese				0	0%	n/a	n/a		
Mid Eastern				1	50%	n/a	n/a		
British				0	0%	n/a	n/a		
Total Respondents				2					
2. Please rate the following									
	VG (3 Points)	G (2 Points)	P (1 Points)	VP (0 Points)	Response Total	Points	Avg		
Cleanliness	100% (2)(6pts)	0% (0)(0pts)	0% (0)(0pts)	0% (0)(0pts)	2	6	3		
Hospitality	50% (1)(3pts)	50% (1)(2pts)	0% (0)(0pts)	0% (0)(0pts)	2	5	2.5		
Location	50% (1)(3pts)	0% (0)(0pts)	0% (0)(0pts)	50% (1)(0pts)	2	3	1.5		
Total Respondents				2					
Point Average				7					
Point Weighted Average				2.33					

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.

Surveys Libraries Templates Email Lists Reports

Results Overview

[EXPORT DATA](#) | [INDIVIDUAL RESPONSES](#) | [PRINT OVERVIEW](#)

MA's survey

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

1. Which of the following cuisines do you prefer?

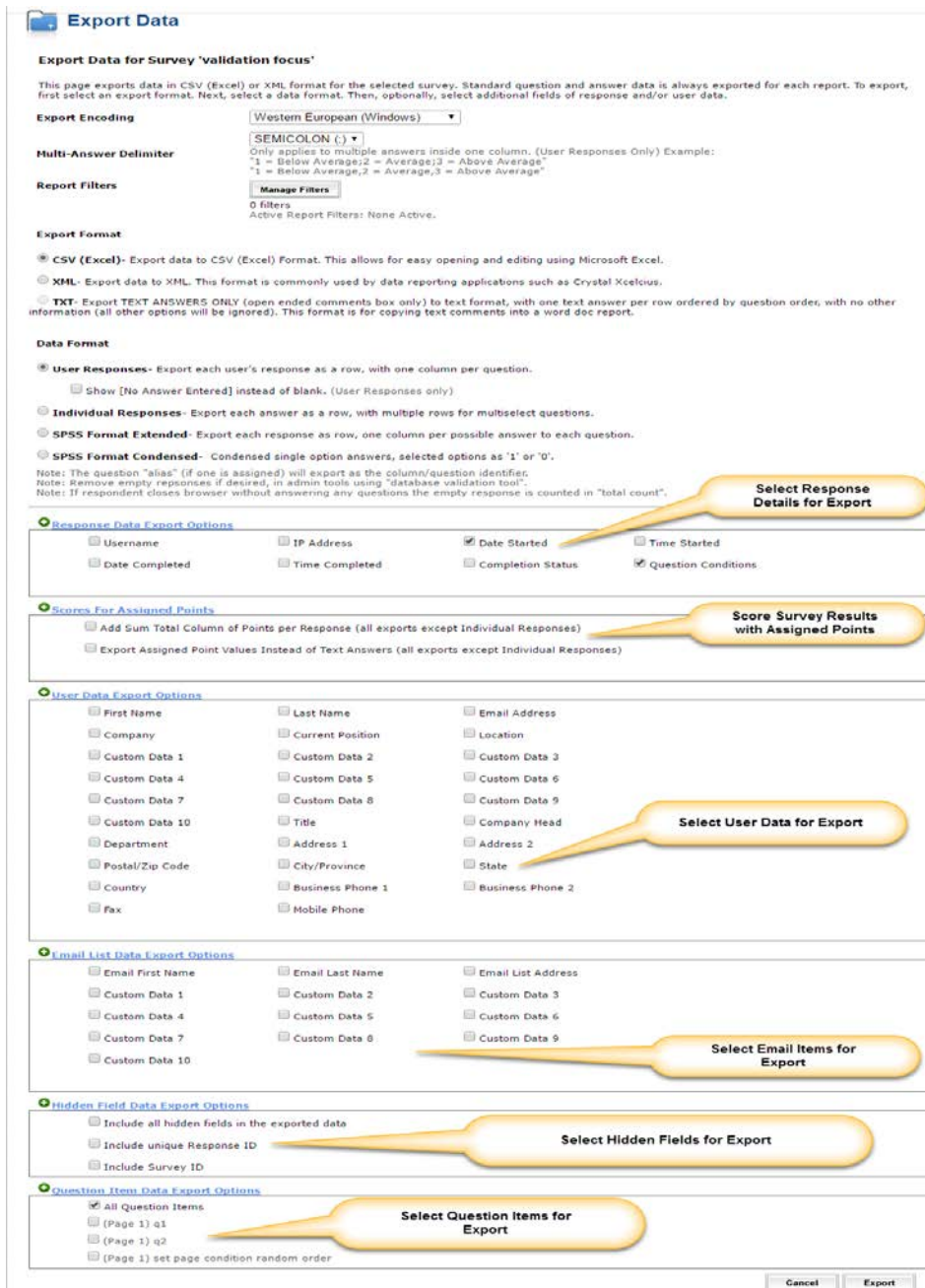
	Response Total	Response Percent	Points	Avg
Italian	1	50%	n/a	n/a
Chinese	0	0%	n/a	n/a
Mid Eastern	1	50%	n/a	n/a
British	0	0%	n/a	n/a
Total Respondents		2		

2. Please rate the following

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

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

Multi-Answer Delimiter 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 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 Xcelsius.
- TEXT**- 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".

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

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)

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	

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		

Hidden Field Data Export Options

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

Question Item Data Export Options

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

Reports

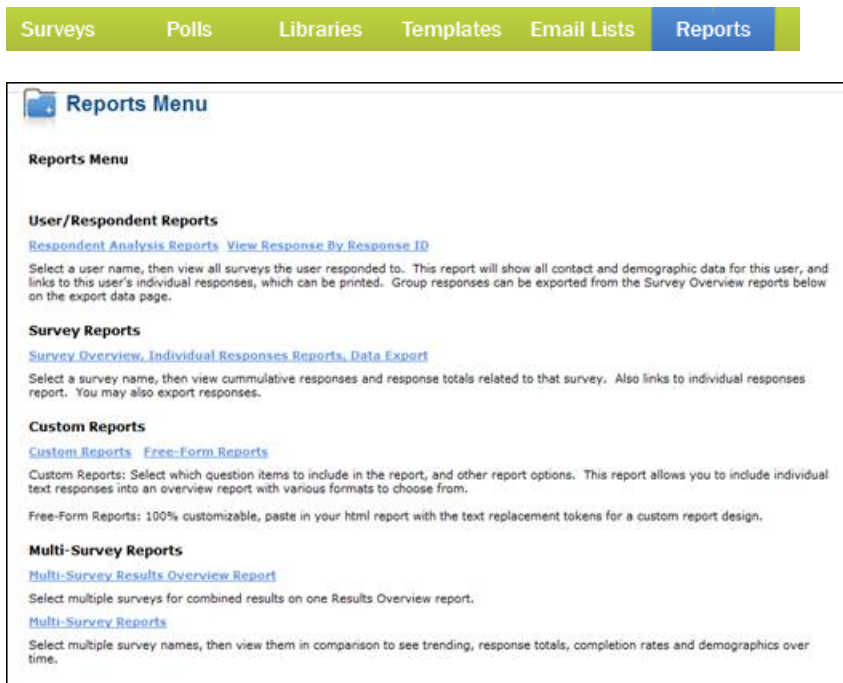
SelectSurvey provides several report generators on the **Reports Menu**, giving you an ability to generate a number of standard and custom reports, including:

- 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.

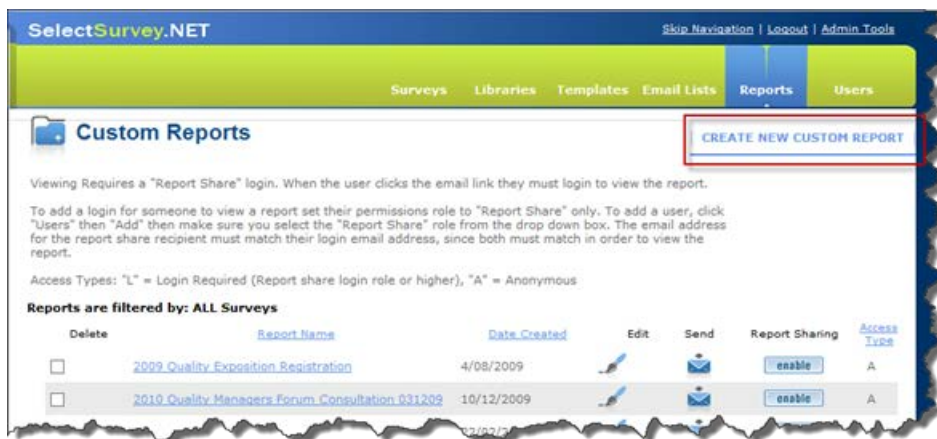
Custom Reports

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.

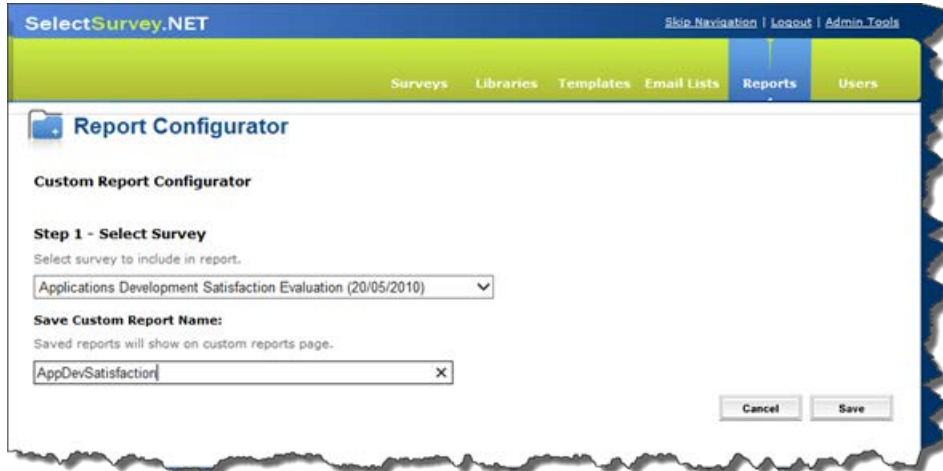
Custom reports also have html and PDF view/print options (2.0 .net framework or greater). You can save and edit custom report configurations and share the results with others. If you intend to share the results with others you must enable this feature first and then create a report share list.

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**

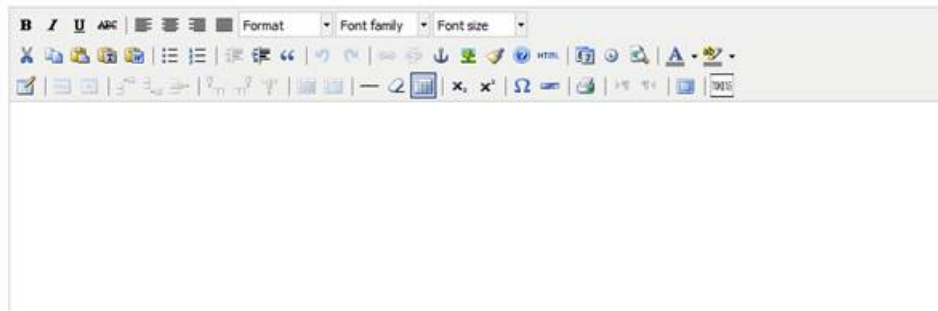


5. Select ALL options from Custom Report Configurator for selected report
 - Access Type
 - Anonymous or Login



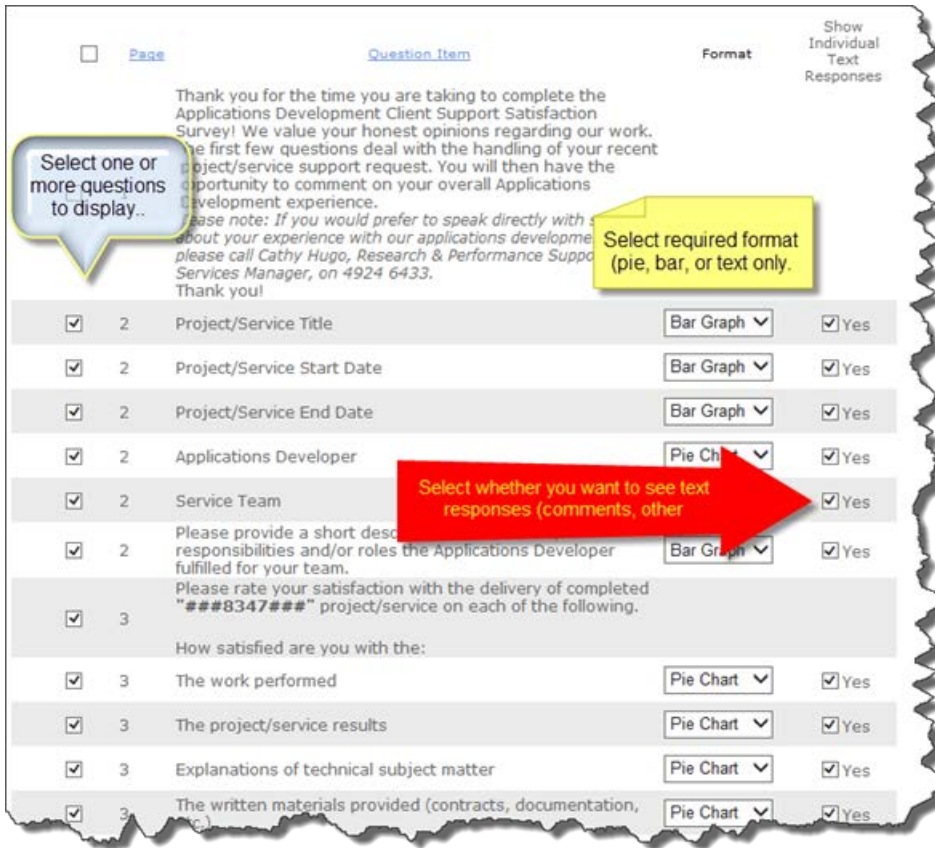
6. Add report Introduction (your own text which will appear above the other data)

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.



The screenshot shows a survey configuration table with the following columns: Page, Question Item, Format, and Show Individual Text Responses. The table contains several rows of survey questions. Callouts provide instructions: a blue callout points to the 'Page' column, a yellow callout points to the 'Format' column, and a red callout points to the 'Show Individual Text Responses' column.

<input type="checkbox"/>	Page	Question Item	Format	Show Individual Text Responses
<input checked="" type="checkbox"/>	2	Project/Service Title	Bar Graph	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	2	Project/Service Start Date	Bar Graph	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	2	Project/Service End Date	Bar Graph	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	2	Applications Developer	Pie Chart	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	2	Service Team	Bar Graph	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	2	Please provide a short description of the responsibilities and/or roles the Applications Developer fulfilled for your team.	Bar Graph	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	3	Please rate your satisfaction with the delivery of completed "###8347###" project/service on each of the following.		
		How satisfied are you with the:		
<input checked="" type="checkbox"/>	3	The work performed	Pie Chart	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	3	The project/service results	Pie Chart	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	3	Explanations of technical subject matter	Pie Chart	<input checked="" type="checkbox"/> Yes
<input checked="" type="checkbox"/>	3	The written materials provided (contracts, documentation, etc.)	Pie Chart	<input checked="" type="checkbox"/> Yes

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 Email

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"/>	2009 Quality Exposition Registration	4/08/2009			enable	A
<input type="checkbox"/>	2010 Quality Managers Forum Consultation 031209	10/12/2009			enable	A
<input type="checkbox"/>	AMF July	24/08/2009			enable	A
<input type="checkbox"/>	Analysis of 2011 QSP	29/09/2011			enable	A
<input type="checkbox"/>	AppDevSatisfaction	12/11/2013			enable	A
<input type="checkbox"/>	Auswell's trial	15/07/2010			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)

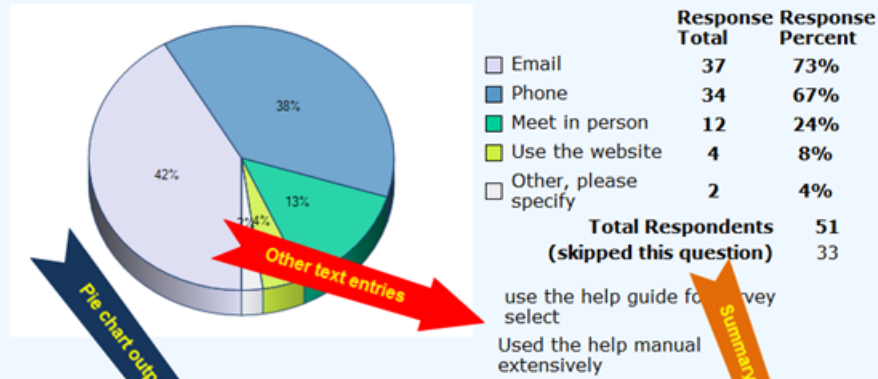
HNELHDSelectSurveyClientSatisfaction

Survey Title: HNELHD SelectSurvey Client Support Satisfaction Survey

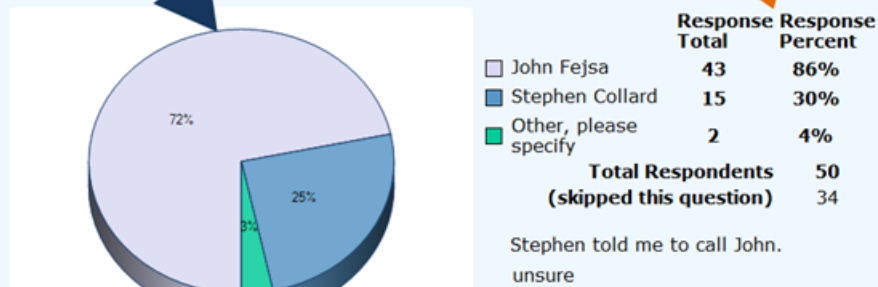
Responses By Question Analysis:

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

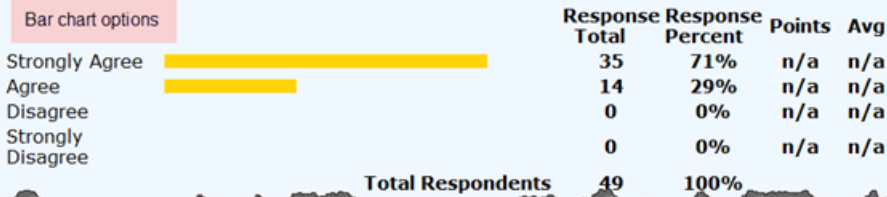
1. When you needed support or information; did you usually?



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

1. 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. IT knowledge excellent, however support is limited by what the staff member has on which could sometimes be frustrating. It would be good to
7. 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
<input type="checkbox"/>	HNEIHDSelectSurveyClientSatisfaction	12/11/2013		Y	disable	A
<input type="checkbox"/>	AppDevSatisfaction	12/11/2013		Y	disable	A
<input type="checkbox"/>	Allied_Health_Form_2013	12/11/2013		Y	disable	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**

Email Custom Report

Step 2 of 2 -- 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.

Link PDF Link HTML

Custom Report:

Email Subject:*

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

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

'CC' Address(es): If desired, you may enter any email address(es) that should be CC'ed for each email. Multiple email addresses should be separated by a semi-colon.

'BCC' Address(es): If desired, you may enter any email address(es) that should be BCC'ed for each email. Multiple email addresses should be separated by a semi-colon.

Email Text:*

Enter the text of your email below. You may include the following tokens, each of which will be replaced, as noted, in the actual email:
 #CustomReportLink# - The location of the link to the survey (required)
 #FirstName# - The first name of the email recipient
 #LastName# - The last name of the recipient
 #CustomData1# - The first custom data field
 #CustomData2# - The second custom data field
 #CustomData3# - The third custom data field

HTML EMAIL VERSION:
 All emails have an html view and a plain text view (called alternate views), the recipient settings determine which is displayed.

B I U ABC Format Font family Font size

Dear #FirstName#,

Below is a link to the survey analysis data that you requested.

The link to the report is:
#CustomReportLink#

Thanks in advance for your attention,
John

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.

Default	Email List Name	Addresses	Messages	Edit	Delete	Import	Export	Send
No	itech test							

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

Sent Date	Survey Name	Email Subject	Response Count	Sent Count	Send Follow-Up	Details	Archive
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 This List was Last Sent on: 5/26/2016 5:01:37 PM With Email Subject: test
Pre-Populate Message:	<input type="radio"/> Default <input type="radio"/> From Prior Email <input type="radio"/> From Email Template
Send Date:	Enter the date and time that you want the follow up emails to be sent on. 06/09/2016 <input type="text"/> <input type="button" value="Calendar"/> <input type="button" value="Now"/> <input type="button" value="v"/>
Email Subject:*	<input type="text" value="Enter the subject of email"/>
'From' Name:	Enter the NAME that you want to show that the email is being sent from. <input type="text" value="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. <input type="text" value="Enter the EMAIL address that the email should appear to come from."/>
Email Text:*	<input checked="" type="radio"/> HTML <input type="radio"/> 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 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 if they are using an antivirus/spam program.

[Send Test Email](#)



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

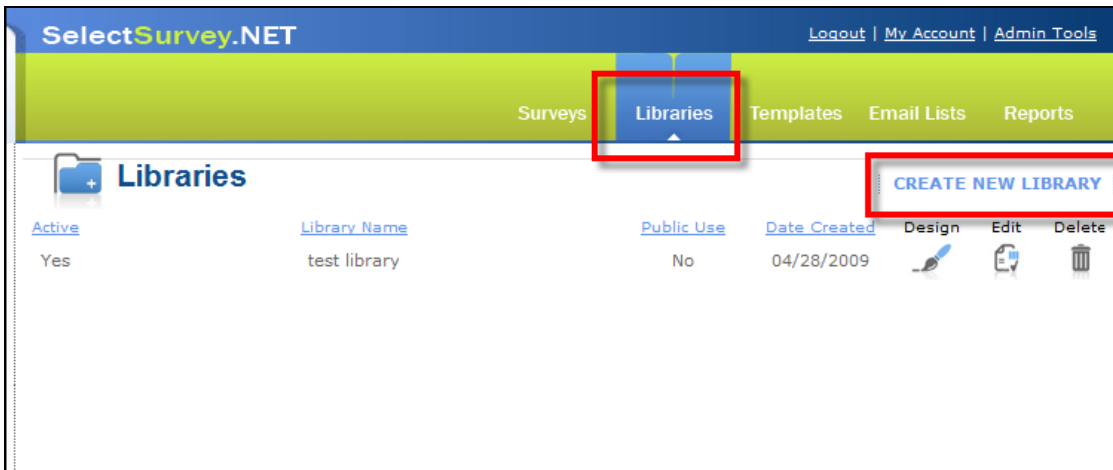
###SL=[see token menu]	Score Column Sum Tokens
-------------------------------	-------------------------

###SN=[see token menu]	Score Cell Tokens
-------------------------------	-------------------

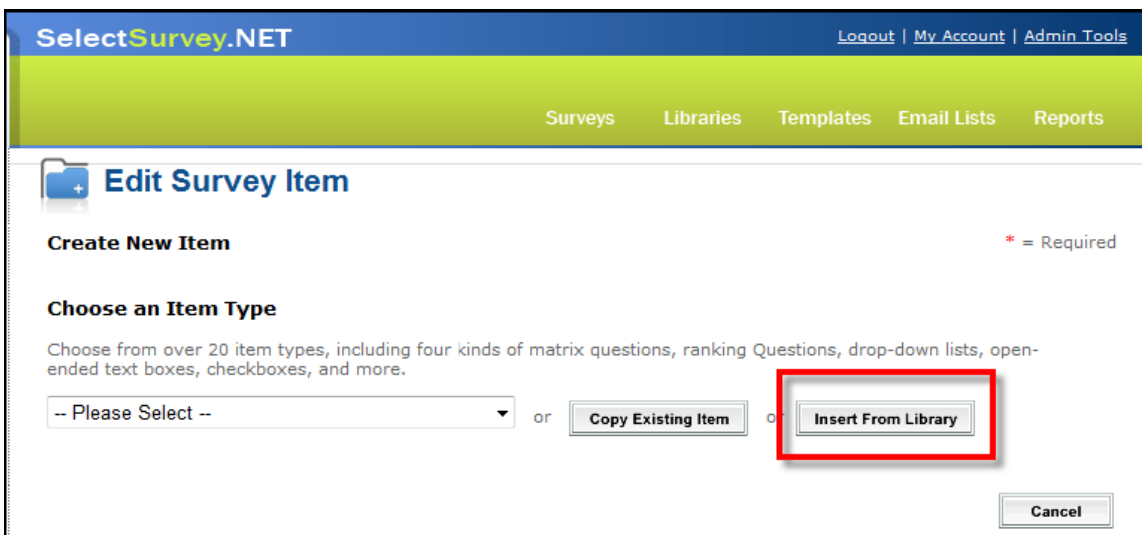
Keep a Library of Questions

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



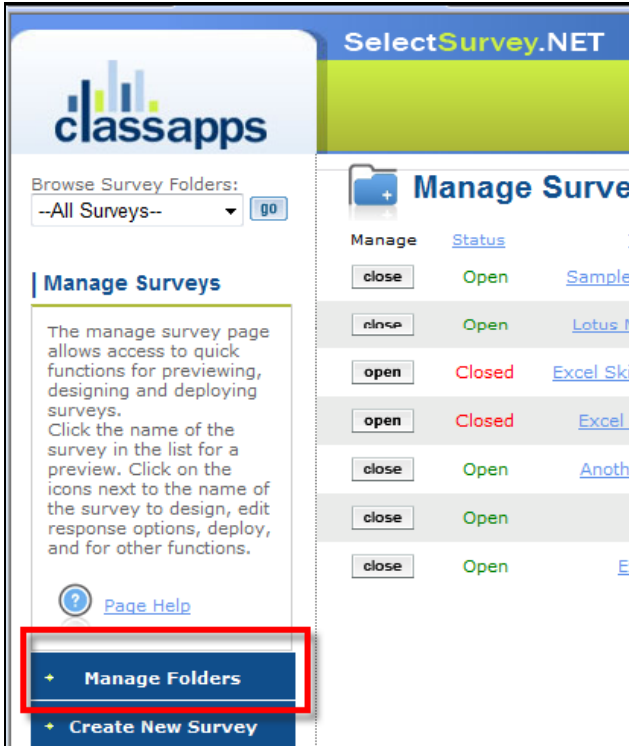
Now, when you are designing a survey click **Insert From Library** to select the question from the Library.



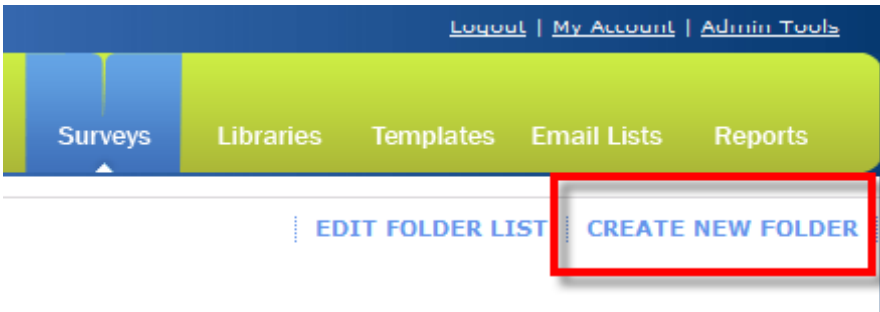
Organize Your Surveys into Folders

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**

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;)	
<input type="text" value="test folder that is pub"/>	Public to all Admin and Create Role Users ▼	<input type="text" value="admin;"/>	<input type="text" value="admin;"/>	<input type="button" value="delete"/>
<input type="text" value="new"/>	Public to all Admin and Create Role Users ▼	<input type="text" value="admin;"/>	<input type="text" value="admin;"/>	<input type="button" value="delete"/>
Default Folder	Restricted to Owners ▼	<input type="text" value="admin;create;"/>	<input type="text"/>	<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.

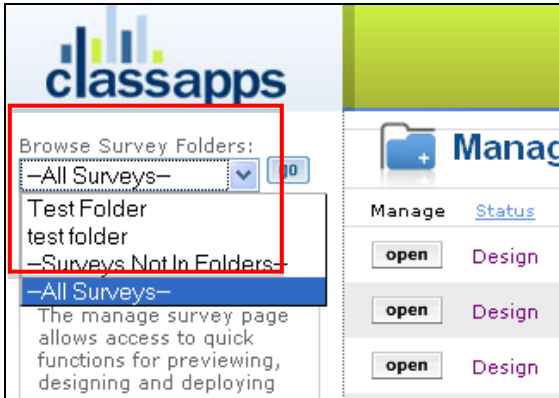
Manage Survey Folders

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

Folder	Survey Title	Date Created	Status
<input type="text" value="Default Folder"/> <input type="text" value="new"/> <input type="text" value="test folder that is public"/> <input style="border: 2px solid red;" type="text" value="--No Folder--"/>	Question Type Demo	09/01/2014	Open
<input type="text" value="Default Folder"/> <input type="text" value="new"/> <input type="text" value="test folder that is public"/>	test	08/25/2014	Open

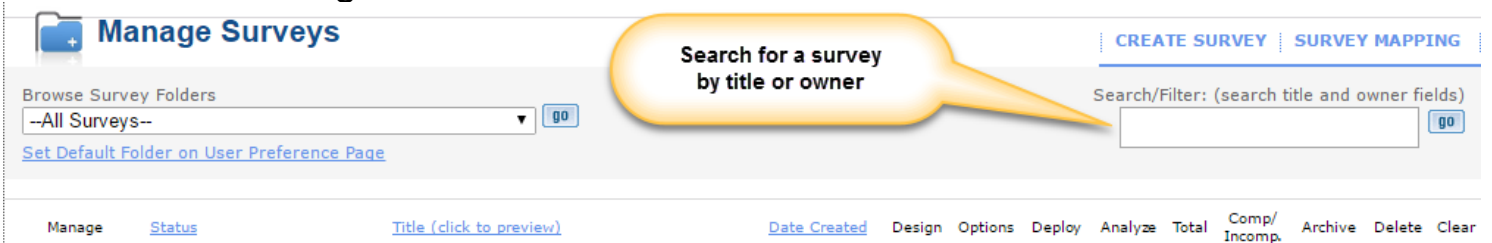
To access all surveys in a folder:

- 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.

