SelectSurvey.NET Basic Training Class 1

3 Hour Course

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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
For instance, here we chose **One Answer (Option Buttons):**
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
2. Excel 2007
3.
4.
5.

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 PROXINO - old
   - [ ] Manage Suppliers and Products Start Page for Leslie
   - [ ] Edit supplier logic - do not delete
   - [ ] Event RECAP copy - old version
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.
• Choice – Database Options

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

- Porsche
- 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.
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.

- **Matrix - Multiple Answers per Row (Text/Dropdown)**
  Multiple question types in each column. Row text can be dynamically displayed.
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.
• **Matrix - Rating Scale (Numeric)**
  Respondent can select only one radio button per row.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Row 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Row 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

   - School Lunches Bad
   - School Staff Bad
   - School Facilities Bad

   School Lunches Good
   School Staff Good
   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:
   
   22

   o **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.

  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.

• **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 trainings:
   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
   0

- **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.

8. 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.
• **Open Ended – Ranking**
  Specify the starting and ending ranking numbers that the respondent must rank with.
  Rank the items below using numeric values starting with 1.

<table>
<thead>
<tr>
<th>Row1</th>
<th>Row2</th>
<th>Row3</th>
</tr>
</thead>
</table>

• **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.

**User Account Information**

- **User Name**: admin
- **Password**: 
- **Reenter Password**: 
- **Title**: 
- **First Name**: Joe
- **Last Name**: User
- **Email Address**: JoeUser@YourCompany.com
- **Reenter Email Address**: 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.

- **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.

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.

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:

1. test

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

   [click "Browse" button below to locate file]

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

   Browse...  Upload

   Upload Successful for: TakeAGuidedTour.gif

   Next

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

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 describe the hotspot, to be used in the text only export and reports as the text edit them in the textbox below and remember to click save.

---

**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.

- **TOUCH - Number Slider**
  The number slider shows in html 5 if an iphone, kiosk, ipad or touchscreen is being used.
  2. Touch number slider.
      
      ![Number Slider](image)

- **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:

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.

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. Please complete all questions.

1. What version of Excel are you using?*
   - Excel 2003
   - Excel 2007

(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.

- Click **Edit** to edit an existing question.
- Click **Delete** if you decide that you don’t want this question anymore.
- Click **Copy** if you decide that you don’t want this question anymore.
- 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...."

Page 1 - This is where the question exists.
Page 2 - Sets the conditions for Red.
Page 3 - Sets the conditions for Yellow.
Click the **Page Conditions** button for page 2 (Red):

(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.

You can add multiple question conditions to a single question.
If the selection is not selected, the conditional text box does not appear:
1. Question condition example
   - Strongly Agree
   - Agree
   - Neutral
   - Disagree
   - Strongly Disagree

2. Matrix text box

---

**Hide/Show on Same Page Question Conditions**

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

1. Do you work in Kansas City?
   - None

2. Select Kansas City locations where you have worked:
   - Office A
   - Office B
   - Office C
   - Office D
   - Office E

---

Click "hide cond." button

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
  - 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.
Deploy Your Survey

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

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

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

You can also use any 3\(^{rd}\) 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:

Existing Custom URLs for this Survey:

<table>
<thead>
<tr>
<th>Route Name</th>
<th>Route URL</th>
<th>Route Physical File</th>
<th>Route Survey ID</th>
<th>Delete</th>
</tr>
</thead>
</table>

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**

---

### 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**

- [W3C/ISO/ITU] (select format for this section)
- [UTF-8] (select format for this section)

**Hello Answer Definitions**

- [Example: “Average” = Average] (select format for this section)
- [Example: “Average” = Average w/ Average] (select format for this section)

**Data Filters**

- [Filter] (select format for this section)
- [Exclude] (select format for this section)

**Export Format**

- [CSV (Excel): Export data to CSV (Excel) Format] (select format for this section)
- [XML: Export data to XML] (select format for this section)

**User Information**

- [Include User Information] (select format for this section)
- [Exclude User Information] (select format for this section)

**Question Response Details for Export**

- [Select Question Details for Export] (select format for this section)

**Scored Survey Results with Assigned Points**

- [Select Scored Survey Results] (select format for this section)

**New Data Export Options**

- [Select New Data Export Options] (select format for this section)

**Export User Data Export Options**

- [Select Export User Data] (select format for this section)

**Export Email Item Export Options**

- [Select Export Email Item] (select format for this section)

**Hidden Field Data Export Options**

- [Select Hidden Field Data Export Options] (select format for this section)

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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**

- User/Respondent Reports
  - Respondent Analysis Reports
    - View Response By Respondent ID
      - Select a user name, then view all surveys the user responded to. The report will show all content and demographic data for the user, and links to the user's individual responses, which can be printed. Group responses can be exported from the Survey Overview reports below on the export data page.
  - Survey Reports
    - Survey Overview, Individual Responses Reports, Data Expert
      - Select a survey name, then view cumulative responses and response totals related to that survey. Also links to individual responses report. You may also export responses.
  - Custom Reports
    - Custom Reports, Free Form Reports
      - Custom Reports: Select which question items to include in the report, and other report options. This report allows you to include individual text responses into an overview report with various formats to choose from.
      - Free Form Reports: 10% customizable, paste in your html report with the text replacement tokens for a custom report design.
  - Multi-Survey Reports
    - Multi-Survey Results Overview Report
      - Select multiple surveys for combined results on one Results Overview report.
    - Multi-Survey Reports
      - Select multiple survey names, then view them in comparison to see trending, response totals, completion rates and demographics over time.

- Reports Menu opens listing the following options:
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**

![Report Configurator](image)

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)

   ![Text Editor](image)

**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)
HNELHD Select Survey Client Satisfaction

Survey Title: HNELHD Select Survey 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?

<table>
<thead>
<tr>
<th>Option</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>37</td>
<td>73%</td>
</tr>
<tr>
<td>Phone</td>
<td>34</td>
<td>67%</td>
</tr>
<tr>
<td>Meet in person</td>
<td>12</td>
<td>24%</td>
</tr>
<tr>
<td>Use the website</td>
<td>4</td>
<td>8%</td>
</tr>
<tr>
<td>Other, please specify</td>
<td>2</td>
<td>4%</td>
</tr>
</tbody>
</table>

Total Respondents (skipped this question) 51

Other text entries:

- use the help guide for survey select
- Used the help manual extensively

2. Who dealt with your request or query?

<table>
<thead>
<tr>
<th>Option</th>
<th>Total</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Felsa</td>
<td>43</td>
<td>86%</td>
</tr>
<tr>
<td>Stephen Collard</td>
<td>15</td>
<td>30%</td>
</tr>
<tr>
<td>Other, please specify</td>
<td>2</td>
<td>4%</td>
</tr>
</tbody>
</table>

Total Respondents (skipped this question) 50

Stephen told me to call John. unsure

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

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Total</th>
<th>Percent</th>
<th>Points</th>
<th>Avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>35</td>
<td>71%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Agree</td>
<td>14</td>
<td>29%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Disagree</td>
<td>0</td>
<td>0%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>0</td>
<td>0%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

Total Respondents 49 100%
Step 6 – Share reports

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

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

2. Select **Email List** and apply any required filters
3. Click **Continue** button
4. Set up **Message Details**
5. Click **Send** button to send the report to selected recipients.

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

You can search for an email list by name using the search box shown below.
Once you have sent an email to an email list, you can send a follow up email to that email list.

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

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

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

<table>
<thead>
<tr>
<th>TOKEN</th>
<th>CHART TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>###RAD=SP###</td>
<td>Specific Practice Radar Chart</td>
</tr>
<tr>
<td>###GML=GP###</td>
<td>Generic Practice Final Levels Chart</td>
</tr>
<tr>
<td>###SML=SP###</td>
<td>Specific Practice Final Levels Chart</td>
</tr>
<tr>
<td>###PL=GP###</td>
<td>Generic Practice Response Breakdown Chart</td>
</tr>
<tr>
<td>###PL=SP###</td>
<td>Specific Practice Response Breakdown Chart</td>
</tr>
<tr>
<td>###SR=GAMP###</td>
<td>Response Breakdown Chart</td>
</tr>
<tr>
<td>###SR=ISO###</td>
<td>ISO Response Breakdown Chart</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOKEN</th>
<th>INDIVIDUAL VALUE DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>###SC=[see token menu]</td>
<td>Score Tokens</td>
</tr>
<tr>
<td>###SB=[see token menu]</td>
<td>Score Sub-Item Row Sum Tokens</td>
</tr>
<tr>
<td>SL</td>
<td>Score Column Sum Tokens</td>
</tr>
<tr>
<td>-----</td>
<td>-------------------------</td>
</tr>
<tr>
<td>SN</td>
<td>Score Cell Tokens</td>
</tr>
</tbody>
</table>
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**

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.