

SelectSurvey.NET IT Power User Training

3 hour course

Updated for V4.162.000 3/2017





SelectSurvey.NET IT Power User Training Agenda

In this video course, students will learn all of the important information related to maintaining the SelectSurvey application.

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Course Outline

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

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Obtaining Technical Support Resources





Advanced Survey Design:

Database Dropdown Question – Database Option

Choice – Database Dropdown

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

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

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

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

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

An example with a hidden field token is:

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

An example without a token is:

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





🛄 R	esults 📑 Messa	ges	
	state_abbr	state_id	full_state
1	KS	1	KANSAS
2	MO	2	MISSOURI
3	CO	3	COLORADO





Question

Enter the question. * Use this field to enter the text for your question or input prompt.	
B I U AB€ ≡ ≡ ≡ Format • Font family • Font size •	
🔏 🗈 🛍 🛍 🗄 🚝 🏥 🛱 🗰 🤊 🗮 🖉 🔘 📖 🛐 🕒 🕵	<u>A</u> + <u>ab</u> / -
📓 🗃 🗷 ∃ ⁻⁰ ∃ ₋₀ ∋+ ² m m ² 1 1 1 1 1 1 1 1 1 − 2 🛄 ×. ×' Ω 🖛 ④ ⊨ π	
Select the survey: Enter Question Text here	
Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question wi	ll be displayed.
Enter the sub-text. Enter informational or additional text to display below the question.	Select Database Connection
Check to show database filter button that will launch filter selection pop up to filter question it	em answers.
Select the database connection DSN: (add these in admin tools)	
StudioDReader	15
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 ir *ex: SELECT Country AS ItemDisplay, Country AS ItemValue FROM Countries	Enter database query
The SQL can contain a piping token, for example: WHERE (dbo.myTable.myID = ###442###) In the above example the piping token "###442###" would be replaced with the item answer val database. select top 5 title as ItemDisplay, title as ItemValue from sur_survey	lue o tem 442 in your survey

Database Dropdown Question – Web Service Option

Choice – Database Dropdown

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

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

Below is



ClassAp	ops.com	S	urveys	Libraries	Templates	Email Lists
	Admin Tools					
	Tools and Utilities for Survey Administrators					
	General Configuration <u>View General Configuration</u> General configuration settings based on web.config file are displays <u>Change Application Wide Settings</u> Application wide settings that should only be modified by a cadminist serious malfunction of the application. Database and Web Service Utilities	Web Servic Database created in	ce Toke Tokens Admin ⁻	ns and s are Tools.	entire applicat	ion, and if set inco
Database Tokens (Nicknames) used in Dynamic Tokens and Database Question Types Database tokens are nicknames stored in the database associated with various database connection strings used for dynamic tokens, or feature allows admins to add connection strings, whereas the create user will only see the token nickname for the connection string an information. Web Service/API Tokens used in Dynamic Tokens and Database Question Types Web Service tokens are nicknames stored in the database associated with third party web service ASMX URL, credentials and argument types from a web service or API call to an external API. Debug Database Connection						
Click	If you are getting an error on login after configuring the web.config the link "Web Service/API Tokens used in Dy	file, this will help. You namic Tokens	s and D	in the databas Database	e connection ar Question	nd database type a Types" as

shown in the image above.
ectSurveyNET-TRUNK/src/WebServiceTokens.aspx

1	SelectSurvey.NET Skip Na					<u>Navigation Logout My Account Admin Tools</u>				
					Surveys	Libraries	Templates	Email Lists	Reports	Users
	— W	eb S	ervice Token (Nickname) Ass	signment			C	REATE WEE	SERVICE TOKEN
		Delete	API Token Nickname	Web Service Name	Web Ser	vice URL		Web Serv	ce Method	Edit
			country	country	http://www.webservio	ex.net/count	ry.asmx	GetCo	untries	
					1					
	Click	here to s	elect or deselect all web	service tokens.						Delete Checked

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

Q ☆



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

New tab T-TRUNK/src/WebServiceToken.asp	x?State=Edit					
SelectSurvey.NET				<u>Skip I</u>	<u>Navigation</u> <u>Log</u>	out <u>My Accou</u>
		Surveys	Libraries	remplates	Email Lists	Reports
Given (Nice Token (Nice Token (Nice))	ckname) Assignment					WEB SERV
Add Web Service/API Token (Nickname):						
Web Service Token Nickname:* Token Nicknames must be unique. No special characters are allowed.	country		Example:	country		
Web Service Name:* No special characters are allowed.	country		Example:	country		
Web Service/API URL: * i.e. http://your.com/yourapi.asmx	http://www.webservicex.net/country	asmx	Example:	http://www.we	ebservicex.net/	country.asmx
Web Service/API Credentials Username: * Enter the username required to access the API.			Example:	(leave blank)		
Web Service/API Credentials Password:* Enter the password required to access the API.			Example:	(leave blank)		
Web Service/API Method: * Enter the method for ths API ex: GetCountries() The arguments, if any, are specified on the edit item page.	GetCountries		Example:	GetCountries		
Web Service/API Credentials Encryption Key:* Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.			Example:	(leave blank)		

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

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

Your screen should look identical to the below:



Enter the question alias. Enter alt	Select the web service token in this box as the source from populating data.	lank, the actual question will be displayed.
External Web Service/	API Select the 3rd party teb Servic	e/API: (add these in admin tools) d 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 bef

External Database Select the database connection DSN: (add these in admin tools)
 --Select Database DSN Connection (set up in admin tools)--
 Add Database DSN Connections

Enter the SQL. *The SQL must contain two columns aliased as ItemValue and ItemDisplay. ItemDisplay will be the value shown in the dropdown, ItemValue will be the answer recorded in the database. In most cases this will l *ex: SELECT Country AS ItemDisplay. Country AS ItemValue FROM Countries

So the below dropdown question is now populating with countries:



	None	*	Surveys
dify Surv	Afghanistan, Islamic State of Albania Algeria American Samoa Andorra, Principality of		RINT LAUNCH PRE
ages	Angola Anguilla Antarctica Antigua and Barbuda Argentina		
test Click o	Armenia Aruba Australia		ı new first page.
[No 1	Austria Azerbaidjan Babamaa		
1.	Bahrain Bahrain Bangladesh Barbados	Ŧ	age condition copy pa

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

Database Checkbox Question

Choice - Database Checkboxes

Entering your dynamic database query returns rows for checkbox list.

- 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

Database Options Question

Choice – Database Options Entering your dynamic database query returns rows for radio buttons.





13. Select Survey:

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

Matrix Database Query Capability

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

Applies To Only the Below Matrix Question Types:

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



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





Rows Row names. *Enter each row name on a separate line below. Example: Row1 Row2 Row3 Advanced Option- Format: left text right text Alias can be specified after a semi-colon: left text right text;alias;defaultcol1value defaultcol2value
Advanced Option- You can prepopulate a column answer for each row for that column. Dynamic/Piping Tokens can be used in row and/or column text and/or default answers. For example: ###DT=EMPLOYEES_1###;;###DT=EMPLOYEENAME_1#####DT=EMPLOYEETITLE_1### ###DT=EMPLOYEES_2###;;###DT=EMPLOYEENAME_2######DT=EMPLOYEETITLE_2###
Advanced Option- Custom Query for row names: Must start with "QUERY:" and return a variable named as "RESULTS" which contains the row names EXAMPLE: QUERY:select top 5 title AS RESULTS from sur_survey Click HELP Link in left menu and click on pipe tokens for examples of how to populate from other question answers. QUERY:select top 5 title AS RESULTS from sur_survey

Enter your columns as you would normally.

Columns

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

For Icon Question Types Only:

Icon Class (the ex: fa fa-check fa-2x (choose any icons from http://fontawesome.github.io/Fon Icon Color Class (can be a different class for each column so each column can have separate h Specify Colors in Survey Template CSS

1	Enter Your First Name	Open Ended - One Line 🔻	Α
2	Enter Your Last Name	Open Ended - One Line 🔻	Α
3	Select Your Location	Choice - One Answer (Dr ▼ LocationA;Loca	ti A

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





matrix query example

Page 1 of 1

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

	Enter Your First Name	Enter Your Last Name	Select Your Location
decisionmaking in secondary prophylaxis of venous thromboembolism			Please Sel V
test			Please Sel v
date			Please Sel ▼
NPS monitor			Please Sel V
TestKamil			Please Sel V
		Done	

Matrix Rating Scale Slider Question Type

Matrix - Rating Scale Slider (Numeric)

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



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





Choice – One Answer Per Row (Icons)

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

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



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

Ans	wer Alignment *Select the way answe	ers should be aligned	d on the page.				
Ve	tical 🔹	(Horizontal) Answer	s Per Row: 5	 (default 5) 			
Ans Sele Sel Ente For Icor Spe	Swers tct answer choices. Select a group of a lect answer group (optional) • er the answers.* Enter each of the an Icon Question Types Only: Class (the ex: fa fa-check fa-2x (cho Color Class (can be a different class cify Colors in Survey Template CSS	answers of goes ic swers in the coo oose ap icons from for ach column so	tt that next to con xes berow. http://fontawesome. each column can ha	github.io/Font-Awesome, ve separate hover colors	Use icon-pic select icon list of avail font-awest icons.	ker to from able ome	color of icon (blank defaults to black)
1	Posrche	Default	points Alias:	Icon Class:	fa fa-car fa-lg	Icon Color:	green
2	Corvette	Default	points Alias:	Icon Class:	fa fa-car fa-lg	/ Icon Color:	red
3	Mercedes	Default	points Alias:	Icon Class:	fa fa-car fa-lg	🥟 Icon Color:	blue
		insert new answer					

3. Pick your favorite car



Calculated Question Type

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

For example, a question that calculates body mass index:

Weight divided by height times height * 703.

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

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

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classapps	
Edit Survey Item	Crea
This page allows you to edit a survey item.	Сһос
Page Help	Choos
508 Accessibility Tip: To select from the item type drop down box without a mouse, hold down the "CTRL" key while clicking the down arrow to choose without causing an automatic post back.	Oper Cor Conve respoi Spe Spell Currei
+ Survey List	OPEN
+ Token Reference	Que
	Enter B
N	
k}###12500### 1	1 Is this the state you are still located?
###12499### 1	2 database dropdown question type.
###12502### 2	3 Enter your weight in pounds 4 Enter your beight in inches
###12501### 3	The state you selected is: ###12499### The st ###12500###

Then use those values in your calculation:



 Image: Second state of the second s

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

Options

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

The calculated question type allows the survey to calculate values from previous numeric questions displaying the Enter the calculation using pipe tokens to represent the question item answer values. Example:(###133###/(###145###*##146###))*703

Tokens must be questions that were on previously answered pages of the survey, otherwise the values will not be (###12502###/(###12503###*###12503###))*703

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



			_ 🗆 🗙
(←) ⊖	http://localhost/SelectSurveyNET-TRUNK 🔎 👻 🖄 🧟 Surveys	<i>e</i> localhost 🛛 🗙	11 ★ ✿
☆			
	database dropdown example		
		Page 2 d	of 4
	3. Enter your weight in pounds 130 130		
	 Enter your height in inches 67 		
	Back Next		

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



			_ 🗆 🗙
(Http://localhost/SelectSurveyNET-TRUNK ♀ ▼ ☆ C Surveys Surveys	<i>i</i> localhost 🛛 🕹	↑ ★ ₽
☆			
	database dropdown example		
		Page 3	of 4
	5. Calculated Question Type Example Your BMI is: 20		
	Back		

Adding HTML in question text

How to add links to your question text

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



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

OPEN TEXT REPLACEMEN	Click the "Inse link" icon to ir hyperlink inte	ert/edit nsert a o your	,, ,		
Question					
Enter the question. * Use	this field to enter the	text for your ques	tion or input p	prompt.	
File - Edit - In	isert 🔻 View 👻	Format 👻 T	able - To	ools -	
S 🔿 Fermats	• <u>A</u> • <u>A</u> •	BII≣	E 3		
P 💽 Font Fan	nily 👻 Font Size	es 🔻			
Insert/edit linknethod					
Enter the question alias. E	nter alternate text for	use in the reports	s. If blank, the	e actual question v	will be displayed.
Enter the sub-text. Enter i	nformational or additi	ional text to displa	y below the qu	lestion.	

Validation Options

How to add html to your question text

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

Things you can do with this:

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





Source code	×
contact method	
L	

Question

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



contact method



How to add images to question answer options

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

Your text

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

This is RED text and this is not.

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

	Answers
20	Select answer choices. Select a group of answers or enter the answers Select answer group (optional)
	Enter the answers.*Enter each of the answers in the text boxes below.
	1 Banana × O Def
	2 O Def
	3 O Def
	4 O Def
	5 O Def
	insert new answer
	Allow additional answer. Check this box if you would like an additi

You can also add height and alignment to your html.



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5	data	abase dropdown example
	6.	Choice - One Answer (Option BUttons) Question Type Banana Blackberry Strawberry Kiwi
	Ans	wer Alignment *Select the way answers should be aligned on the pac tical (Horizontal) Answers Per Row:
	Ans Sele Sele Ente	swers st answer choices. Select a group of answers or enter the answers b ect answer group (optional) v r the answers.*Enter each of the answers in the text boxes below. Banana <img beig]="" opefau<="" src="UnloadedImages/banana ing" th=""/>
	2	Blackberry <img <="" src="InloadedImages/blackberry ing" td=""/>
	2	src=" lploaded mages/strawberry.ppg" Defau
	2	Kiwi <ima beight="</th></tr><tr><th></th><th>-+</th><th>insert new answer</th></tr><tr><th></th><td></td><td>Allow additional answer. Check this box if you would like an addition
" below.<br="" box="" in="" other"="" prompt="" src="UnloadedImages/kiwifruit ing" text="" the="">Other please specify</ima>

Timed and Scored Survey Design

Timed Survey

Click "Survey Options" then click "Access" then click "Timed" and enter the maximum time for taking the survey.



General	Display	Access	Completion	ActiveLogic				
Respondent Access Level Response Level Help								
Authentica	ition	Anonyr	nous					
Responses		Multiple	e Responses Not U	pdateable				
		Note: R page. Note: Lo to surve tools du	Note: Resumable response types will resume to the page. Note: Login required survey links will redirect use to survey if they are not already logged in. Note: tools due to security.					
IP Address Range: There are no IP address ranges configured for "Configure" button to add IP address validation								
User Grou	p Restriction	s: There a "Configu	There are no User Group restrictions configured fo "Configure" button to add User Group validation o					
AD User G	roup Restrict	ion: There a "Configu Active D	 There are no AD Group restrictions configured for "Configure" button to add AD User Group validatic Active Directory Authentication is not enabled 					
Max # Res	ponses	Enter th respons	Enter the maximum number of responses for this responses.					
# responses per User Multiple Response surveys only, enter the ma blank for unlimited responses.								
Days for U	pdate:	Enter th option a	Enter the number of days during which a respond option applies to respondent access levels that are					
Timed Sur	vey	○ Not ● Time	Timed ed 15	× (minutes)				

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

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

test	
1. <u>BalloonExample</u> tooltips example	Time Elapsed: 0 minutes Time Remaining: 15 minutes Total Time: 15 minutes

Scored Survey

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

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



Answers

Sele	Select answer choices. Select a group of answers or enter the answers below.							
Agr	Agree - Disagree 🗸 😰							
Ente	Enter the answers.*Enter each of the answers in the text boxes below.							
1	Strongly Agree		Default 5	points	Alias	:		
2	Agree		Default 4	points	Alias	:		
3	Neutral		Default 3	points	Alias	:		
4	Disagree		Default 2	points	Alias	:		
5	Strongly Disagree		Default 1	points	A ias			
	insert new answer							
	 Allow additional answer. Check this box if you would like an additional "Other" answer to allow survey takers to give a diff "Other" prompt in the text box below. Other, please specify 							
	A 100 T 1 1 1 1 1 A 1 1 0 T 1 1 0 T 1 1 0							

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

3. Example of points					
		Response Total	Response Percent	Points	Avg
		\ \	/iew responses	to this questi	n view
Strongly Agree (5 Points)		0	0%	0	0
Agree (4 Points)		1	100%	4	4
Neutral (3 Points)		0	0%	0	0
Disagree (2 Points)		0	0%	0	0
Strongly Disagree (1 Points)		0	0%	0	0
	Total Respondents (For this Question)	1	100%		
	Total	Responses	1		
	Total Poi	nts Earned	4		
Point Average (TotalPoints/UniqueRespondentCount-SkippedTotal)) 4			
	Point Weighted Average TotalPoints/Res	oonseCount) 4		
	(skipped th	is question)	1		
		View condi	tional respons	es (if applicabl	e) view

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

5		SCORE TOKENS:			
2		TOKEN ###SCORE###	SURVEY PAGE	ORDER	QUESTION TEXT
0		###SC=12508###	1	3	Example of points
	T	No tokens defined fo	r selection.		
		No tokens defined fo	r selection.		
		No tokens defined fo	r selection.		

classapps

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2	
	Presentation - Message 🗸 💿 or
	Convert Question Type Convert Question Type: Change question type and map existing res responses, you can change question type from changing choose ite Spell Check Question Text Spell Checker Help: If the box flashes and goes away, that means i Current Dictionary: English - International. 21 Dictionaries are insta
	Message Enter the message.* Enter the text for the message. You earned ###SC=12508### points!
3	test
	Time Elapsed: 0 minutes Time Remaining: 15 minutes Total Time: 15 minutes
	Back Done

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

Multiple Language Survey Design

Language selector survey

To create a survey in multiple languages:

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





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

Advanced Piping Tokens:

Pre-populating a survey with email list tokens

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

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

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

HIDDEN DATA TOUCHE.



2

Example of email list token prepopulation	
Enter the question alias. Enter alternate text for use in the reports. If blank, the actual question will be displayed.	
	0
Enter the sub-text. Enter informational or additional text to display below the question.	v
	~
	~
Validation Options	
□ Required. Check this box if an answer to this question is required.	
Advanced Validation	
Email Address. Check this box if the answer must be a valid email address.	
Password Field. Check this box if the answer should be masked with asterisks like a password.	
Default Value. The value entered below will be displayed as the default answer value for this question. ###ED=EMAIL_ADD	RESS###
Maximum Length. Enter the maximum number of llowable characters for this answer.	

Pre-populating a survey with user tokens

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



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

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

Template Design

You can create as many look and feel survey templates as you like. You can use the built in template edit menus, or paste in your own custom style sheet like the below example:



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2

test	Time Elapsed: 0 minutes Page 1 of Time Remaining: 15 minutes Total Time: 15 minutes
BalloonExample tooltips example	
None V 3. Example of points O Strongly Agree O Agree	
 Neutral Disagree Strongly Disagree 	
	Next

Stylesheet for the above template:

```
<style type="text/css">
```

```
/*
```

* Survey Stylesheet

```
*/
```

```
/* CUSTOM CLASSES
```

*/

#head-top {

background: #373737;

height: 40px;

padding-left: 3000px;

margin-left: -3000px;

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padding-right: 3000px;

margin-right: -3000px;

position: absolute;

top: 0;

border-bottom: solid 4px #f5f2ed;

}

#head-main {

position: absolute;

top: 0;

left: 0;

display: table;

width: 760px;

height: 119px;

}

#head-main {

display: table-cell;

vertical-align: bottom;

margin-right: 0;

}

#head-main img {

border-style: none;

vertical-align: top;

float: left;

margin-left: 15px;

}

#head-main h1 {

color: #c34500;

font-family: 'EksjaExtremesRegular';

-webkit-font-smoothing: antialiased;



- font-size: 20px;
- font-weight: bold;
- margin-left: 125px;
- margin-right: 30px;
- margin-top: 90px;
- text-align: right;

}

#head-main .ir-top {

position: absolute;

height: 119px;

width: 100%;

float: left;

z-index: -1;

padding-bottom: 10px;

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

border: solid 1px #fff;

/* Rounded Corners */

-moz-border-radius: 15px;

border-radius: 15px;

/* Box Shadow */

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

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

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

}

#footer {

classapps

padding-top: 20px; background: #373737; height: 30px;

border-top: solid 4px #f5f2ed;



padding-left: 3000px;

margin-left: -3000px;

padding-right: 3000px;

margin-right: -3000px;

position: fixed;

bottom: 0;

}

#footer span {

color: #f5f2ed;

font-size: 13px;

width: 760px;

display: block;

text-align: center;

}

#push {

padding: 80px;

}

/* STANDARD CLASSES

*/

.SurveyName /*style of survey name/title that is outside of outline border*/{

font-family: 'EksjaExtremesRegular';

-webkit-font-smoothing: antialiased;

font-size: 28px;

font-weight: bold;

position: relative;

top: 193px;

left: 80px;

z-index:100;

}

classapps

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```
.SurveyBodyStyle /*style on survey body tag*/{
        margin: 0;
        overflow-x: hidden;
        font-family: 'Gudea', sans-serif;
        -webkit-font-smoothing: antialiased;
        background:url(/uploads/images/mushroom.jpg) fixed;
.SurveyAlignmentStyle /*outer alignment table style*/{
        position: relative;
        margin-top: 0;
```

border-spacing: 0;

}

}

.SurveyAlignmentRowStyle /*first row in outer alignment table*/{}

```
.SurveyLogoBlockStyle /*outer table that contains logo*/{}
```

.SurveyBorder,

table[style\$="#ffffff"] /*border width and style of box that goes around survey page*/{

position: relative; top: 130px; border: solid 1px #fff; padding:10px; margin-bottom: 80px; height: 100%; background-color: rgba(245, 242, 237, .5); overflow-x: hidden; /* Rounded Corners */ -moz-border-radius: 15px; border-radius: 15px; /* Box Shadow */ -moz-box-shadow: 1px 1px 10px 5px #444;



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

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

}

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

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

background: #f3d08e;

overflow: hidden;

-moz-border-radius: 15px;

border-radius: 15px;

}

```
table[style$="#f5f2ed"] {
```

overflow: hidden;

border: solid #f5f2ed 1px;

-moz-border-radius: 15px;

-webkit-border-radius: 15px;

border-radius: 15px;

}

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

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

-webkit-font-smoothing: antialiased;

font-size: 140%;

}

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

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

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

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

.SurveyProgressBarTable { }

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

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



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.SurveyMatrixHeadingRowText {}

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

.SurveyPageIntroTable /*the style of table width/size for page introduction text*/{

position: absolute;

top: 20px;

left: -10px;

}

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

.QuestionHolderTable /*height and width of table that contains the questions for the survey*/{

```
background: #f5f2ed;
width: 103%;
```

margin-left: -10px;

padding-top: 15px;

}

.QuestionHolderTable tbody {width: 100%;}

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

.Normal {

/*position: absolute;

left: 20px;

z-index: 50;

width: 400px;*/

}

.Required { }

.H1HeadingStyle { }

.PageNumberFontStyle { }

.InlineHelpSpanStyle { }

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

.SurveyNavigationLink A { }

.ConstantSum { }

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

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.YesNo {}

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

.TouchNumberSliderTable { }

/* BUTTON STYLE

*/

.button {

background: -webkit-gradient(linear, left top, left bottom, color-stop(0.05, #db723d), color-stop(1, #c34400)); background: -moz-linear-gradient(center top, #db723d 5%, #c34400 100%); filter: progid: DXImageTransform.Microsoft.gradient(startColorstr='#db723d', endColorstr='#c34400'); background-color:#db723d;

-moz-border-radius:6px;

-webkit-border-radius:6px;

border-radius:6px;

border:1px solid #373737;

display: inline-block;

color:#ffffff;

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

-webkit-font-smoothing: antialiased;

font-size:15px;

font-weight: bold;

padding:6px 6px;

text-decoration:none;

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

}.button:hover {

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

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

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

background-color: #c34400;

}.button:active {

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position:relative;

top:1px;

}

/* EKSJA FONT

*/

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

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

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

}

/* SURVEY-SPECIFIC FIELDS

*/

/* Education Abroad */

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

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

.icon-idea {

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

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

}

```
/* Exit Survey */
```

.icon-exit {

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

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

}

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

</style>

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

Stylesheet Link or Stylesheet Text

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

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

Custom Stylesheet

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

```
margin-left: -3000px;
        padding-right: 3000px;
       margin-right: -3000px;
       position: absolute;
        top: 0;
       border-bottom: solid 4px #f5f2ed;
}
#head-main {
       position: absolute;
       top: 0;
        left: 0;
       display: table;
        width: 760px;
       height: 119px;
#head-main {
        display: table-cell;
        vertical-align: bottom;
```

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



6

Template Name:*		Layhna	Template							
Active:*		Yes	~	Public Use:*		Yes	~			
Owners:		Enter the semi-col	nter the usernames for all owners of this survey. Separate each name with a emi-colon, and make sure that your username is in the list.							
Logo Path :		Enter the will be di	e path for the lo splayed.	go to display at the	top of the surveys.	If left blank, no	logo			
						odd				
Logo Alignment:		Right	~	Survey Align	ment:	Center	~			
Borders and Cold	ors									
Matrix Header Color	r:	#EFEFE	F 🔲 🔳	Survey Back	ground Color :*	#FFFFFF				
Matrix First Color:		#FFFFF	F 🔽 🖭	Page Backgr	ound Color:*	#EFEFEF				
Matrix Second Color	r:	#F8F8FF		Display Bord	er:*	Yes	~			
Progress First Color	r:	#EFEFE	FEFEF 🗾 🔠 Border Width:		1:	2				
Progress Second Co	lor:	#FFFFF	F 🕅 🕅	Border Color	:	#003363				
Font Styles										
		Font Co	lor	Font Size	Font Weight*	Font Fam	ily*			
Survey Name	#000000)	**	18	Bold 🗸	Verdana	choos			
Page Title	#000000)		14	Bold 🗸	Verdana	choos			
Page Number	#000000)	**	12	Normal 🗸	Verdana	choos			
Question Text	#000000)	**	12	Normal 🗸	Verdana	choos			
Question Sub-Text	#000000)		10	Normal 🗸	Verdana	choos			
Navigation Links	#000000)		14	Normal 🗸	Verdana	choos			
Matrix Header	#000000)	**	12	Bold 🗸	Verdana	choos			
Page Introduction	#000000)	***	12	Bold 🗸	Verdana	choos			

d Footer





Deploying survey

Short URL Rerouting

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

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

URL REWRITER Create a clean short URL. Example: http://yoururl.com/ClientNar instead of: http://yoururl.com/TakeSurv Existing Custom URLs for thi	ne ey.aspx?SurveyID=123 s Survey:			
Route Name	Route URL	Route Physical File	Route Survey ID	Delete
You do not currently have a URL Shortcut Path Text: No spaces, empty values or s http://yoururl.com/ClientNar http://yoururl.com/	ny URL routes. pecial characters allowed, ne	, this will be used in the URL path. E dd URL Route	xample:	

Email List

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

ctSurvey.NET						<u>Skip Navig</u>	ation Lo	g <u>out</u> <u>My Acc</u>	<u>count</u> <u>Admin Tools</u>
	Workspace	Surveys	Polls	Touch	Libraries	Templates	Email Lis	ts Repor	ts Users
Manage Email Lis	Click Cr New Ema	reate ail List	\vdash	CRE	ATE NEW EMAIL	LIST VIEW	OPT OUT:	5 VIEW S	CHEDULED EMAILS
Email List	Name		Addresses	Messages	Edit	Delete	Import I	Export	Send
Email List for Testing			🄇 з	E,	-8	Ŵ	Ð		

Enter an email list name, then click "Save"





Create Email List

New Email List Options

Email List Name* Test Em	ailliet		
From Scratch	h Create a new Em	ail List from scratch	
From Existin	ig Email List Copy a	an existing Email List	
Email List:	Please Select		•
۲	Copy all email addre	sses	
õ	Copy email addresse	s that match	
	Active:	All 🔻	
	Email Address:		
	Custom Data1:		
	Custom Data2:		
	Custom Data3:		
From Register	ered Users Create a	n email address list from register	red users
۲	Copy all registered u	isers	
0	Copy registered use	rs that match:	
	Active:	All 🔻	
	Email Address:		
	Position:		
	Company:		
	Location:		
	Custom Data 1:		
	Custom Data 2:		
	Custom Data 3:		
	Owners:	admin;	

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





Import Users From:	Comma Separated List	۲
--------------------	----------------------	---

Import Format:

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

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

Import Data:

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

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

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

joe@Mycompany.com,Joe	
fred@yourcompany.com	
alice@hercompany.com,,Johnson	
sam@hiscompany.com,Sam,Johnson,President	
eric@ourcompany.com,,,CEO,\$250K,3 years	
	-11

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

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

	Wor	kspace Surveys Polls	Touch	Libraries Te	mplates Email Li	sts Reports	Users
To edit, remove		To add addresses click "Import"	CREA	TE NEW EMAIL LIS	5 VIEW SCHEDULED EMAILS		
addresses click	List Name	Addresses	Messages	Eari	Delete Import	Export	Send
"Addresses"	st for Testin	g 🗘 3	Ē		1	A	`
No	Test Email List	(() 0			🔟 🌓	A	Ž



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

📑 En	nail Messages						Clie	ik to ooi	ad fallow	
Email Me * Follow-Up	ssages for 'Email List for Response Counts show on th	or Testing' Er	nail List				Cild	K LO SEI		up
Sent Date	Survey N	ame		<u>Email Subj</u>	ect	Res	ponse Count	Sent Count	Send Follow-Up	Details
5/27/2014	EVENT RECAP FI	NAL 6-9-2014		Event Recap 5-2	28-2014		0	3	· ·	£,
8/25/2014	EVENT RECAP FI	NAL 6-9-2014		(Follow Up En	nail)		*	3		E,
8/25/2014	EVENT RECAP FI	NAL 6-9-2014		(Follow Up En	nail)	Click "De	etails" view			Ē,
8/25/2014	EVENT RECAP FI	NAL 6-9-2014		(Follow Up Ema	ail) test	message	details			- 0
- / / · ·				/= ·· ·· -		Ū		-		6
Below is	an example of th	ne messa	ge details p	age:						
Email I	Message Details	;								
ssage Deta	ils									
	Massaga Subject	Event De	oon E 28 2014	Data	Font	E/27/2014 10	07 DM			
	Email List:	Event Re Email Lis	t for Testing	Surve	sent: :y:	EVENT RECAP	FINAL 6-	9-2014		
	Message Text:	Dear #Fi	rstName#,							
		We are c The link t #Survey	onducting a surve to the survey is: Link#	y, and would appr	eciate your i	response.				
		Thanks ir Scott	advance for resp	oonding to the surv	/ey,					
	CC Emails:									
	BCC Emails:									
	From Email: Response Count:	tech@cla:	ssapps.com	HTML	: Count:	Yes				
	Kesponse count.	0		Sent	count.	5				
	Emails Sent						Displayin	g 1 - 3 of 3	3	
	Filter by response type:	All	▼ go							
	<u>EmailAddress</u>	<u>First Name</u>	<u>e Last Name</u> <u>F</u>	Response Date	<u>Status</u>	Response	<u>Se</u>	<u>nt Date</u>		
	briggs.sheryl@gmail.com	Sheryl	Briggs		No Respon	se	5/27/20)14 10:07 F	РМ	
	sales@classapps	com	Sales		No Respon	se	5/27/20)14 10:07 F	M	
	tech@classapps.com	Tech			No Respon	se	5/27/20)14 10:07 F	PM	

w 25 ▼ sent emails per page

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

		Workspace	Surveys	Polls	Touch	Libraries	Templates	Email Lists	Reports	Users
Cla	assApps.com									
1	ResponseLogic \$	Scheduled	Messag	jes						
	Condition Legend: A = No Response, E	= Responded, C	= Declined							
	Message Type: S = Standard Message, F	= Follow Up Mes	sage							
	Scheduled Date	Subject	C	Condition		Message Typ	е	View Bo	ody	Delete

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

<u> </u>	
Step 2 of 2 Message Det	If sent prior, time and date are shown to prevent sending twice
All fields marked with a red asteri button to send the email to the de	sk (*) are required. You can personalize your email by including tokens in sedescribed below. When finished, click the Send signated recipients.
Email List:	The email list selected on the last page. Click back to change the email list. Email List for Testing This List was Last Sent on: 5/27/2014 10:07:11 PM With Email Subject: Event Recap 5-28-2014
Survev:*	Select the survey to which the email will be sent.
2	Please Select
Pre-Populate Message From Prior Email Optional Pre-Populate Message From Email Template	Select email message from below list: Please Select Populate Email Warning: You must remove or update any tokens that were survey s Tokens from a different survey will not work. Select email template from below list: Select email temp
	No Available Templates Populate Email
Send Date:	Enter the date and time that you want the suvey emails to be cent on. 09/01/2014 Image: Now
Email Subject:*	
'From' Name:	Enter the NAME that you want to show that the email is being sent from.
'From' Address:*	Enter the EMAIL address that the email should appear to come from.

Email Text:*

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

Email List containing survey login/password

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

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

\sim			
	Email	Address	
+	Eman	Address	

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

List Name:	
Email Address:*	sales@classapps.com
First Name:	Sales
Last Name:	Person
Custom Data 1:	username
Custom Data 2:	password
Custom Data 3:	office 1
Active:*	Yes 🗸

Email Text:*

Enter the text of your email below. You may include the following tokens, each of whid #SurveyLink# - The location of the link to the survey (required) (this is formatted with #SurveyLinkUnformatted# - No anchor tags around the link, so you can put it in an im #EIDToken# - Just the EID with nothing around it. Usage Example: yoururl/TakeSurve starting marker.

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

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

#DeclineLink# - The location of the link a user can click to decline responding to the su #DeclineLinkUnformatted# - No anchor tags around the link so you can put it in an im; #FirstName# - The first name of the email recipient

#LastName# - The last name of the recipient

#CustomData1# - The first custom data field

#CustomData2# - The second custom data field

#CustomData3# - The third custom data field

#OptOutLink# - A link for the user to opt-out of further emails (this is just the link put receive emails"...)

HTML EMAIL VERSION:

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



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



3rd party email deployment such as Constant Contact

Generic Link: (no individual email list tracking)

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

Title (click to preview)	Date Created	Design	Options	Deploy	Analyze	Total	Comp/ Incomp.	Archive	Delete	Clear
test	11/15/2013		Ē,			4	1/3	н	Ŵ	8
tabase dropdown example	11/14/2013		E,	÷	<u></u>	1	0/1	Η	Û	\otimes

Deploy Survey

ploy 'test' Survey

Send Survey Invitations by Email To Send Invitations via the SelectSurvey E mail List Utility Select the Use E mail List button below. Email lists allow you to send a dynamic link to the Survey that offers you the ability to use Data Piping to insert any of the e mail list data into the survey. If instead you need to deploy a static link via web page, pop up, or want to use your desktop e mail program use the link below based on purpose. Email Lists Did my survey ID change? Specify Custom Survey ID Only letters and numbers are allowed. NO spaces, punctuation, or XML or HTML characters are allowed which could potent break the survey link. 94L1976 Save Custom SurveyID
Email Link To send a link to your survey via email, simply copy the link below and paste it into your email. http://localhost/SelectSurveyNET-TRUNK/src/TakeSurvey.aspx?SurveyID=94L1976

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

Unique Individual Link: (with email list tracking)

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



Step 1 of 2 -- Email Recipients

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

Select Email List				
Select the email list to v Email List for Testing (which the email message (3 email addresses)	should be sent.	Select option to write EID unique URL's to	
Apply Filter) Send to all email addre	sses.	party email system to maintain tracking	
Ő) Send to all email addre	sses that have not opted ou	between both systems.	/
۲	Write EID URLs to File. Does not send email, w link from a third party of	rites unique URLs to file. Thi email program.	is will write the sent history to the table for	tracking with the EID
C) Send to email addresse	es that match:		
	Active:	No 🔻		
	Email Address:			
	Custom Data 1:			
	Custom Data 2:			
	Custom Data 3:			
				C

Email Message Formatting

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

The Default message looks like this:

Dear #FirstName#,

We are conducting a survey, and would appreciate your response. The link to the survey is: #SurveyLink#

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

Thanks in advance for responding to the survey, Scott

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

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







#QSEnd# - Survey Link query strign add on values ending marker. Example: #SurveyLink##QSStart#&product=apple&office=#CustomData1#&country=US#QSEnd# The above example will automatically attached the extra query string values on to the end of the #SurveyLink# URL anchor tag.

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

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

#FirstName# - The first name of the email recipient

#LastName# - The last name of the recipient

#CustomData1# - The first custom data field

#CustomData2# - The second custom data field

#CustomData3# - The third custom data field

#OptOutLink# - A link for the user to opt-out of further emails (this is just the link put your own text around it such as "click #OptOutLink# if you no longer wish to receive emails"...)





Hidden Fields

3								
General	Display	Access	Completion	ActiveLogic	Report	Advanced	Validation	
Hidden Fie	elds:		There are n button to ac only be add	o hidden fields conf dd fields or to learn ed to a survey that	igured for this more about h does not have	survey. Click the idden fields. Hide any responses.	e "Configure" den finds can	Configure
Configured Dynamic T	d Dynamic To Tokens:	okensConfigu	red There are n "Configure"	o Dynamic Tokens o button to add dyna	configured for mic token or f	this survey. Clicl to learn more.	k the	Configure
Hidden Fi	elds Survey	,						

Hidden Fields Survey

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

# Delete	Туре	Кеу	Display Name		
1 🕅 Q	uerystring 🗸	test	test	×	
					\square
			Back	Insert Hidden Fie	ld Save

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

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

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



Dynamic Tokens

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

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

3								
General	Display	Access	Completion	ActiveLogic	Report	Advanced	Validation	
Hidden Fields:			There are no hidd button to add fiel only be added to	len fields configure ds or to learn more a survey that does	d for this surv about hidden not have any	ey. Click the "Cor fields. Hidden fie responses.	nfigure" Configure	
Configure	d Dynamic		Dynamic	token name	Text	Replacement 1	Token Configure	
TokensCo Tokens:	nfigured Dyn	amic	REPORT		##	#DT=REPORT_1	###	
l'oncentra i			GRANDTOTAL		###D	_1###	_	
			TOTALYARDS		###D	T=TOTALYARDS	_1###	
			REPORT2		###	###		
			page5		# #	##		
			page11		##	#DT=page11_1#	###	
			page13		##	#DT=page13_1	###	
			page15		##	#DT=page15_1	###	
			page17		##	#DT=page17_1	###	
			page19		##	#DT=page19_1#	###	
			page21		##	#DT=page21_1	###	
			page23		##	#DT=page23_1	###	



Insert Dynamic token
Create/Edit Dynamic Token
Enter the database connection string for the database that will be queried: (must be same database type as what the application already uses)
Server=ATOMIC7\SQLEXPRESS;Database=hawcpa2;UID=sa;PWD=ddh0sr;
Select Database Type:* This can be separate database from your survey database, by specifying the connection parameters below.
Select Database Driver:* Example: MS Access uses the OleDb driver. MS SQL can use SqlClient or Oledb driver. SqlClient ✓
<pre>Select Query Dataset: Place the piping token (i.e. ###123###) into the SQL query where token will be replaced with the answer that was provided by respondent to this question when taking the survey. NOTE: MUST USE "AS RESULTS" in the query for the dynamic token to get results. Example: select title AS results from sur_survey where survey_id = ###100### Insert With Query: Example: insert into x (number_col, text_col) output INSERTED.number_col AS results values (###100###, '###101###') Select CAST (answer_text AS VARCHAR (MAX)) as [Company Name], ra.response_id as [Response ID], '\$'+convert(varchar(50), cast(round((isnull(ti.totalInvoiced,0)*.05- (isnull(ts.totalSubtractions,0))*.05), 2) as numeric(36,2)), -1) as [Stewardship</pre>
Assessment Due Care], isnull(ti.totalInvoiced,0)- (isnull(ts.totalSubtractions,0)) as
from sur response answer ra
left outer join
(Select sum(CAST((cast(answer text as nvarchar(max))) as float)) as totalInvoiced.
response id
from sur response answer where item id in
Ther a name for this token which will identify it on the configure dynamic tokens page. Underscores are disallowed and will removed. ###DT=REPORT

DYNAMIC TOKEN PIPING QUERY EXAMPLES:

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

Dynamic Token Query Example 1:

select title AS results from sur_survey where survey_id = ###100###

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

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

IF EXISTS (SELECT * FROM Acustom_report2 where ResponseID = #ResponseID# and SurveyID = #SURVEYID# and ProductNum = 3) UPDATE Acustom_report2 set ResponseID = #ResponseID#, SurveyID = #SURVEYID#, ResponseDate = GETDATE(), ProductNum = 3,[Product Sold] = '###445###',[FIber Type] = '###446###',Backing = '###447###'





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

Dynamic Token Query Example 3: (delete data with a dynamic token in a survey) delete from Acustom_report2 output " as results where ResponseID NOT IN (select response_id from sur_response)

Dynamic Token Query Example 4: (generate a chart with a dynamic token in a custom report) select [Product Sold], [Fiber Type], [Backing], SUM([Square Yards Sold]) AS [Square Yards Sold], '\$'+convert(varchar(50),cast(round(SUM([Square Yards Sold]*.05),2) as numeric(36,2)),-1) AS [Stewardship Assessment Invoiced], SUM([Square Yards Returned]) AS [Square Yards Returned], '\$'+convert(varchar(50),cast(round(SUM([Square Yards Returned]*.05),2) as numeric(36,2)),-1) AS [Stewardship Assessment Returned], SUM([Exempt Assessment Adj]) AS [Exempt Assessment Adjustment - Square Yards], '\$'+convert(varchar(50),cast(round(SUM([Exempt Assessment Adj]*.05),2) as numeric(36,2)),-1) AS [Exempt Assessment Adjustment Amount], SUM([Write Off Assessment NC]) AS [Write Off Assessment Non Compliance - Square Yards], '\$'+convert(varchar(50),cast(round(SUM([Write Off Assessment NC]*.05),2) as numeric(36,2)),-1) AS [Write off Assessment Non Compliance Amount], SUM([Write off Assessment Bankrupt]) AS [Write off Assessment Bankrupt -Square Yards], '\$'+convert(varchar(50),cast(round(SUM([Write off Assessment Bankrupt]*.05),2) as numeric(36,2)),-1) AS [Write off Assessment Bankrupt Amount], SUM([Square Yards Sold])-(SUM([Square Yards Returned]) + SUM([Exempt Assessment Adj]) + SUM([Write Off Assessment NC]) + SUM([Write off Assessment Bankrupt])) AS [Net Sq Yds], '\$'+convert(varchar(50),cast(round(SUM([Square Yards Sold]*.05) - (SUM([Square Yards Returned]) + SUM([Exempt Assessment Adj]) + SUM([Write Off Assessment NC]) + SUM([Write off Assessment Bankrupt]))*.05,2) as numeric(36,2)),-1) AS [Stewardship Assessment Due Care] from Acustom_report2 where SurveyID=134 group by [Product Sold], [Fiber Type], [Backing]

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

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

Advanced Reporting

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



Company Name	Response ID	Stewardship Assessment Due Care	Sq. Yards
Alexandria International, Inc.	2471	\$2814.74	56294.73
Alliance Textiles	2489	\$1568.08	31361.6
Atlas Carpet Mills, Inc.	2467	\$3689.15	73783
Beaulieu Group LLC	2485	\$89762.10	1795242.02
BELLBRIDGE, INC	2484	\$95.49	1909.72
Bloomsburg Carpet Industries, Inc.	2465	\$441.70	8834.02
Brintons U.S.Axminster, Inc.	2463	\$1151.06	23021.25
CAP Carpet, Inc.	2472	\$8.88	177.66
Catalina Home	2458	\$680.37	13607.31
CAVALIER CARPET INDUSTRIES	2438	\$2403.42	48068.36
Colin Campbell & Sons Ltd./Nature's Carpet	2462	\$26.38	527.65
COURISTAN, INC.	2482	\$1006.34	20126.87
COURISTAN, INC.	2483	\$94.17	1883.36
Crossley Axminster Inc.	2474	\$54.48	1089.5
Dalton Carpet Mart	2490	\$542.03	10840.51
DALTONIAN FLOORNG INC	2448	\$260.78	5215.66
Design Manufacturing International, LLC	2445	\$50.30	1005.97
Desso USA, Inc.	2469	\$27.21	544.18
DOBBS MILLS LLC	2486	\$34230.11	684602.11
Earth Weave Carpet Mills	2466	\$68.19	1363.89
Emerald Carpets	2481	\$3389.06	67781.29
Engineered Floors 11 C	2456	\$34894 73	697894 59

D,		Surveys	Polls	Touch	Libraries	Templates	Email Lists	Reports	Users
	Free-Form Reports						CREAT	E NEW FREE	-FORM REPORT
	Manage Free Form Reports								
	Below you can add, edit or delete free-form Reports.								

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

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

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

Reports are filtered by: ALL Surveys

Free-Form Report Name	Date Created	Report Share URL		PDF	Edit	Delete	Report Sharing	Access Type
Care Report 2 - 9/25/2013	10/24/2013	http://14.selectsurvey.net/hawcpa/	<u></u>	Ē,		Û	Y disable	А
Care Report 1 - 9/25/2013	10/24/2013	http://14.selectsurvey.net/hawcpa/	<u></u>	Ē		Ī	Y disable	А
Care Report 2 - 9/25/2013	09/25/2013	http://14.selectsurvey.net/hawcpa/		Ē,		Ì	Y disable	А
Care Report 1 - 9/25/2013	09/24/2013	http://14.selectsurvey.net/hawcpa/		Ē	_0	Ī	Y disable	А

Page 56 of 78







Edit Free-Form Report

Select from the below questions to include in the report.



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

Access Type:

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

Page Name:	
(this will show as the page title on the custom completion page)	
Care Report 1 - 9/25/2013	

Custom Page Template:

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

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

How to perform math functions on score token replacements:

Example:[FUNC_START](###SC=133###/(###SC=145###*##SC=146###))*703[FUNC_END]

How to get priority colors based on scores: getPriorityColor(###SC=133###) will return green. getPriority score range.

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

Instructions:

Free Form Auto-PDF Population mapping into Acro Fields

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

First click "Create Free Form Report",

SelectSurvey.NEI

Sciectour rey. NET	
Company Logo Workspace Surveys Polls	Touch Libraries Templates Email Lists Reports Users
Free-Form Reports	Click "Create Free- Form Report"
Manage Free Form Reports	

3

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

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

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

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

Reports are filtered by: ALL Surveys

Free-Form Report Name	Date Created	Report Share URL	View	PDF	Edit	Delete	Report Sharing	Access Type
test	08/11/2014	http://16.selectsurvey.net/studioD/Fo rmReport.aspx?RID=123K3	<u>) </u>	Ē,		T Y	disable	А
Final Event Recap PDF report 6-9-2014	06/09/2014	http://16.selectsurvey.net/studioD/Fo rmReport.aspx?RID=122K3	<u>1</u>	£,	-8	Ŵ	enable	А

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





skip Navigation | Logout | My Account | Admin Tools

Free-Form Reports

Select from the below questions to include in the report.

MANAGE FREE-FORM REPORTS

Edit Free-Form Report

Manage Filters			_	_	_	
Below you can design your own free-form report v cummulative 360 style reports. This is a report of use the Custom Report for individual response disp	vith the html editor using the tokens p cummulative responses for calculating play.	provided which will provide text repla g totals per question. This report is n	Click "E acro fie	dit" fo Id ma	or the pping	ises,
Access Type: Select the access level required to view the report	. All report shares utilize unique URL	link. s If you update s in t	menu	to m	ap	
Anonymous	•	the PDF,	ques	tions	10	
Report Name		click	acrob	oat fie	lds	
Final Event Recap PDF report 6-9-2014		"Rescan"				
Current PDF Template: (that will be autofilled by the individual results)						
StudioDEventRecap-6-9-2014.pdf		View PDF Rescan PDF Update Field	ds			
PDF Field Key	PDF Field Type Name	Question Answer Mapping	Column	Row	Col Ans	EDIT
Brand	TextField	104	-1	-1	0	Edit
Address	TextField	235	-1	-1	0	Edit
Account	TextField	426	-1	-1	0	Edit
Start Time	TextField	380	510	-1	0	Edit
End Time	TextField	379	416	-1	0	Edit
Duration	TextField	236	-1	-1	0	Edit

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

Free-Form Reports

CREATE NEW FREE-FORM REPORT

anage Free Form Reports

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

ewing Requires a "Report Share" login. When the user clicks the e	mail link that must loain to view the room	rt.						
> add a login for someone to view a report set their permissions r leport Share" role from the drop down box. The email address fo ew the report.	Click "View" or "PDF" to view populated individual	ck Io	: "Users gin em	s" then ail add	"Add" th ress, sind	ien make sure y ce both must ma	ou se atch ir	lect the n order to
ccess Types: "L" = Login Required (Report share login role or hig.	responses.	J						
ports are filtered by: ALL Surveys								
-Form Report Name Date Created Rep	ort Share URL	ew	PDF	Edit	Delete	Report Shari	ng	Access Type

-Form Report Name	Date Created	Report Share URL	View	PDF	Edit	Delete	Report Sharing	Access Type
test	08/11/2014	http://16.selectsurvey.net/studioD/Fo rmReport.aspx?RID=123K3	<u>1</u>	Ē,	-0	T Y	disable	А
al Event Recap PDF	06/09/2014	http://16.selectsurvey.net/studioD/Fo	1	Đ		Î	enable	А



Repor	ts		Click "Eo	dit" to edit		Click "PDF" that is pop	to view PDF ulated with	
esponse Rev	iew List for Fr	ee Form Auto Fill PD	F Re resp	onse.		ansv	vers.	
ist of Respon	ses for Reviev	v/Edit						-
Date	Time	Response ID	Username	First Name	Last N	ame <u>Com</u>	pleted Edit	PDF
/10/2014	7:45 PM	320	admin	Scott	Zinn	Υ		<u>a</u>

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

localhost/SelectSurveyNET-TRUNK/src/UploadedImages/SurveyID101/81014-24-ST1.pdf - Google	×
localhost/SelectSurveyNET-TRUNK/src/UploadedImages/SurveyID101/81014-24-ST1.pdf	Q
	Î
GENERAL EVENT RATING (X) Poor Fair O Good V.Good Excellent	
Date 8/10/2014 Job # ST1 Supplier Good	
Off Premise On Premise On Premise Special Event Ostreet Team	
Account Schnucks Address 15425 Manchester Rd, Belton, MO	
Start Time 3:45 PM End Time 6:15 PM Duration 2 hours Rep Present No	
Account Type 💿 Grocery/Retail 🔘 Liquor/Conv. 🔘 Restaurant 🔵 Lounge/Pub 🔘 Club 🔘 Event Venue	
Ttl # Ppl Approached 50 Ttl # of Samples 32 Total # Sold 7	
MERCHANDISING INFO Was PRODUCT DISPLAYED? Yes If Yes, Check: Back Bar Shelves Case Display End How Many FACINGS in a Set? 2 Cap Competitive Displays: Francis Coppola Was the FEATURE POSTED? Yes If Yes, Check: Banner Signage Counter Table Tents Menu FEATURE PRODUCT / DRINK Apothi Red FEATURE PRICE \$ REG PRICE \$ Were there REBATES available? No Permanent ie. exterior, counter/bar top, back bar, staff COMMENTS: No Permanent ie. exterior, counter/bar top, back bar, staff DEMOGRAPHIC INFO Was Account TRAFFIC Too Slow Slow Perfect Busy Too Busy ETHNICITY % Males 50 % 21-25 10 % 26-30 20 % Caucasian 70 % Hispanic 10 % Females 50 % 31-35 30 % 35+ 40 % African American 10 % Asian 10 LIFESTYLE Gen Mkt Urban LBGT SAMPLING DETALLS Males 50 % 31-35 LBGT Males 50 % Asian	
Sample Size 1/4 oz 1/2 oz 1 oz 2 oz 3+oz Cups Unbranded Branded or Client Provided	-

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





Application Wide Settings Options

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



	Surveys	TONS	rouch	LID
General Configuration				
Application-Wide Settings the items on this page should only be changed by an ADM ech@classapps.com or refer to the installation manual.	IIN IT person th	at is responsib	le for installing	g the a
lote on date formats: NET Globalization settings are in IIS, which is where you rouble with your datetime formatting, check the web site h:mm.	will select your I IIS .NET Globali	Encoding and (zation setting	Culture which i s. For example	s usec Encoc
Default is "1". This determines how dates are displayed in 1 USA (mm/dd/yyyy)	the Admin inter	face, despite H	now they are s	tored i
Gerver Date Format Default is "1". This determines how dates are stored in the 1 USA (mm/dd/yyyy)	e server databas	e, despite hov	v they are dsip	layed
Date Delimiter Default is "/". Select the date delimiter that will be used for "	or display in the	admin area. T	his value must	: matcl
ilobalization Language Code befault is "en". Select the primary language of the admin ave the language that you select on the survey options p en English	area that will be age that over-ri	used as the h des this langu	tml language s age on the tak	setting e surv
ilobalization LCID Default is "1033". Select the locale for the admin area whi	ch is also used f	or the datetim	e settings for	schedı

Admin Tools

First, login using and admin account.

Second, click "Admin Tools" link.

					-		×
						☆	≡
			<u>Skip Naviq</u> i	ation Locout	<u>Admin Tools</u>		^
h	Libraries	Templates	Email Lists	Reports	Users		
				CRE	ATE SURVEY		
			Search/Filter: ((search title an	d owner fields)		

Below are the various tools you will have access to:





- Account Usage
- General Configuration
- Application Wide Settings
- Database Tokens (Nicknames) used in Dynamic Tokens and Database Question Types
- Web Service/ API Tokens used in Dynamic Tokens and Database Question Types
- Debug Database Connection
- Database Version
- View Logs, Clear Logs
- Database Validation Tool for Surveys
- Database Validation Tool for Libraries
- Data Copy Utility
- User Data Copy Utility
- Delete Report Filters
- Debug Install SMTP Settings Send Test Email
- Decrypt EID Link or SurveyID
- Specify Company Logo and Copyright Text
- Globalization and Custom Text
- Translate / Edit Global Text
- Translate / Edit Admin Area Text
- Debug International Date Formats
- Unlock Surveys
- Kiosk Admin
- XML Generator Admin
- View Uploaded Images/ Files Upload Image/File





- Activate / De-Activate Question Types
- Active Directory User Field Synchronization Mapping

Kiosk Admin

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

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

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

 Survey Utilities

 Unlock Surveys

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

 Kiosk Admin

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

 XML Generator Admin

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

 View Uploaded Images/Files Upload Image/File

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

 Activate / De-Activate Question Types

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

 ActiveDirectory User Field Synchronization Mapping

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







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

Activate Klosk Home Page at: <u>http://26.selectsurvey.r</u>	net/Demo-EN/KioskHome.aspx			
Activate Kiosk Home 🛛 🖉 🖉				
Kiosk Configuration Settings:	this is the URL open full scre KIOSK	you will en on		
Kiosk Logo Path: Please enter http path to logo that will display in Kiosk Home Pag	ge. (ex: <u>http://www.yourdomain.com/images/yc</u>	urlogo.gif)		
Resources/images/KioskLogo.gif				
Kiosk Surveys: Add or remove surveys that will be available on the Kiosk Home Demo 3-14-2017	Add Survey to Kiosk			
Remove from Kiosk	Survey Title			
Demo 3-14-2017 Remove From Kiosk				
Display User Registration: Enter the survey deployment url of the survey you have created for the registration survey. Display User Registration On Kiosk Home Page	that contains the user registration question type.	Copy the survey	y deployment link from the deploy	page
User Registration Survey Deploy URL: Enter the survey deployment url of the survey you have created for the registration survey.	that contains the user registration question type.	Copy the survey	y deployment link from the deploy	page
http://26.selectsurvey.net/Demo-EN/TakeSurvey.aspx?Surve	eyID=76KH518			

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



Save

Cancel





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

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

User Reviewers for User Workspace and Approve/Review

Reviewer to User Mapping

Apply to:

- User Workspace
- Analyze > Approve/Review



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

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

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

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

	Workspace	Surveys	Polls	Touch	Libraries	Templates	Email Lists	Reports	Users
📑 Assign Reviewers	To Users								
Assign users or user groups to be review	vers for the speci	ified user. All fi	elds marked	with an asteri	sk (*) are requ	ired.			
Reviewer Assignment									
Reviewer Assignment Select User:*	5	Select User			T				
Reviewer Assignment Select User:* Select Reviewer for above User:	5	Select User Select User			T				
Reviewer Assignment Select User:* Select Reviewer for above User: Select Reviewer Group for above Use		Select User Select User Select User Gro	up v		Y				
Reviewer Assignment Select User:* Select Reviewer for above User: Select Reviewer Group for above Use Select Reviewer Role:	r:	Select User Select User Select User Gro evel 1 Reviewel	up ▼		¥ ¥				

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

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

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

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

	Workspace	Surveys	Polls	Touch	Libraries	Templates	Email Lists	Reports	Users
Reviewer to				CREATE US	ER TO REVIE	WER MAPPING			
Delete	<u>User Name</u>	Reviewer	Name		Review	er User Group Na	ame	Edi	it
		Jane [Doe						





User Workspace

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

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

How to Enable the User Workspace Feature:

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

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



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

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



General	Display	Access	Completion	ActiveLogic	Report	Advanced	Validation			
Respondent Access Level Response Level Help										
Authentic	Authentication Anonymous									
Response	Responses Multiple Responses Not Updateable									
	Note: Resumable response types will resume to the LAST page edited, not the following page. Note: Login required survey links will redirect user to login page, then automatically back to survey if they are not already logged in Note: Kiosk option must be enabled in admin tools due to security									
User Worl	Workspace: When checked, this survey will show in the user workspace (based on the access defined here on this page). The user workpace always requires a login. Note: User workspace must be activated in admin tools to use this feature. Image: Show in User Workspace									
IP Addres	s kange:	ange: I nere are no IP address ranges configured for this survey. Click the "Configure" button to add IP address validation or to learn more.							Configure	
User Grou	p Restrictions	Conly the There ar "Configu	Only the below user groups can take the survey. There are no User Group restrictions configured for this survey. Click the "Configure" button to add User Group validation or to learn more.						Configure	
AD User Group Restriction: Only the below AD user groups can take the survey. There are no AD Group restrictions configured for this survey. Click the "Configure" button to add AD User Group validation or to learn more. Active Directory Authentication is not enabled							Configure			

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

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

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



What the User Sees:

15	Survey	Status	٢	Date Assigned	Actions	
lassapps	test single response in workspace	📋 Under Review	9/26/	2016 7:08:09 PM		
	Test Hover Text	1 Not Started	9/7/2	016 8:29:51 AM	Go To Survey	
	testDate	Not Started	9/8/2	016 1:05:08 PM	Go To Surve	
Jser: Joe User /our Position	new touch single choice buttons question type demo	🚺 Not Started	10/3 1	I/2016 1:55:05 PM	Go To Surve	
Your Position Group:	Records per page: 100			Records:	1-4 of 4 - Pages: 🔍 1	

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



How to White Label/Brand the User Workspace:

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

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

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







3rd Party API Integration:

Workfront Project API – Push Survey Data into new Project Issues

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

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

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

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

Add web service token:

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



Click "Create Web Service Token" as shown in above screenshot.

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



ssapps

Web Service Token (Nic	kname) Assignment	WEB SERVICE TOKEN LIST
Add Web Service/API Token (Nickname):		
Web Service Token Nickname:* Token Nicknames must be unique. No special characters are allowed.	Example: country	
Web Service Name (SOAP) or Web Service Contract (WCF)* No special characters are allowed.	SOAP Example: country WCF Example: IAdministration	
Web Service/API URL (SOAP) or Web Service Endpoint (WCF): * i.e. http://your.com/yourapi.asmx	SOAP Example: http://www.webservicex.net/country.asmx WCF Example: http://webservices.com/webservices/Administration.svc	
Web Service/API Method: * Enter the method for ths API ex: GetCountries() The arguments, if any, are specified on the edit item page.	Example: GetCountries	
Optional Additional Configuration:		
Web Service/API Credentials Username: * Enter the username required to access the API.	Example: (leave blank)	
Web Service/API Credentials Password:* Enter the password required to access the API.	Example: (leave blank)	
Web Service/API Credentials Encryption Key:* Must be over 8 characters long, or left empty. Enter the encryption key used by the API to encrypt/decrypt login credentials.	Example: (leave blank)	
		Cancel Save

Now you can setup the Workfront Project Mapping Integration:

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

			<u>Date C</u>	<u>reated</u> DesigrO	ptions Dep	loyAnalyze	e Total	Incomp.	Arc			
	<u>s AU Login F</u>	Required	02/27	/2017 🧹			1	1/0				
2)	Click the	"API" ta	b on th	e Survey (Options	page.						_
	General	Display	Access	Completion	ActiveLo	ogic Re	port	Advanc	ed	Validation	API	
									_	1		

3) Click the "Workfront Project API Configuration" link




General	Display	Access	Completion	ActiveLogic	Report	Advanced	Validation	API
API Integ Note that ar	rations - Pus account may b	h / Pull Data e required with	a from Survey to the 3rd party service	3rd party API. For the below API int	egrations.			
Workfront Workfron	Project API t Project AP	I Configura	i <u>tion</u>					
SalesForc	e API							
<u>SalesFor</u>	e API Confi	guration						
SugarCRM <u>SugarCRI</u>	API API Config	uration						

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

API - Workfront Project Integ	ration
NPI - Workfront Project Integration	
elow you can map survey data to push into Workfront Proj	ject that will create a new Workfront "Issue" when anyone clicks "Done", completing the survey.
Select External Web Service/API (set up in admin tool	Is)▼ Add API Token Connection Name this API Map Config Enabled ▼ add
DI Carfiguration List	

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

API - Workfron	nt Project Integra	ation				
Below you can map	survey data to push i	nto Workfront Project that will	create a new Workfront "I	ssue" when anyone clicks "[Done", completing the survey.	
Select External	Web Service/API (se	et up in admin tools) 🔻 🛛 🗚	d API Token Connection	me this API Map Config	Enabled V add	
API Configuration I	ist					
Survey ID	API Action	API Action Key	API Map Name	Enabled YN	Web Service Token ID	ED
782			test2	Y	1	Ec
782	test1	test2	test	Y	1	Ec
782			test2	Y	1	Ec
782			test2	Y	1	<u>Ec</u>
luestion Item to Al	PI Mapping					
add						
API Ma	p ID	API Key Name		Survey Ouestion It	em ID	EDIT
		testtesttest		25566		Edit
1						





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

Iocalhost/Selection	ctSurvey/APIEditItemMapPopup.aspx?SurveyID=782			
Edit API Key	Field to Survey Answer Mapping	3	* = Requi	ired
Edit by selecting	a question, to map to the API Key field.			
Select Question	to Push To Workfront Custom Field Selected Above:			
Update API Ma	apping based on Question Answer OR Token			
Select API Map	p Name: config A 🔹			
Enter Workfroi	nt Custom Field to Map to: CustomField1			
Enter Workfroi	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens			
Enter Workfroi Token:	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token		•	
Enter Workfror Token:	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token OR		Ţ	
Enter Workfroi Token: Question:	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token OR How much of a financial burden does the infusion therapy place on the statement of	the patie	▼ nt's.▼	
Enter Workfron Token: Question:	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token OR How much of a financial burden does the infusion therapy place on t	the patie	▼ nťs.▼	
Enter Workfroi Token: Question:	nt Custom Field to Map to: CustomField1 Hidden Field data, Email List Data, User Data, all Non-Question Tokens (Note: Score tokens will only show up if you have points in your survey) No Token OR How much of a financial burden does the infusion therapy place on t	the patie	▼ nt's . ▼	

text box

7) Test the mapping.

To Edit the mapping:

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

💽 API - W	orkfront Pro	oject Integration				
API - Workfron	t Project Integra	ntion				
elow you can map country	survey data to push i	nto Workfront Project that will • Add	create a new Workfront "I	ssue" when anyone clicks nfig A	"Done", completing the survey. Enabled v add	
PI Configuration Li	ist					
Survey ID	API Action	API Action Key	API Map Name	Enabled YN	Web Service Token ID	EDIT
782			test2	Y	1	Edit
782	test1	test2	test	Y	1	Edit
782			test2	Y	1	Edit
782			test2	Y	1	Edit
uestion Item to AP add	PI Mapping					
API Maj	p ID	API Key Name		Survey Question	Item ID	EDIT
1 2		testtesttest la la la		25566 25554		Edit Edit





SalesForce API

SalesForce API Integration is coming soon.

SugarCRM API

SugarCRM API Integration is coming soon.



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Obtaining Technical Support Resources

General Technical Support Requests

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

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

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

Customer ID Number (Login): _____

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

Other information on the technical support ticket might include:

SelectSurvey.NET Version Number: v_.___

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

Database Type: _____

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

• IIS Version: __

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

Installation Service/Upgrade Service/Consulting Request

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





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

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

Support Knowledgebase

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

Support Documentation/Videos

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

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

Videos demonstrating features and installation are located here:

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

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

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

Product Updates / Critical Security Warnings

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

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



classapps

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

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

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

