



## Why would I use a survey?

**Demographic information** can be captured using an entrance survey for any curriculum either directly in the application or via a link sent in a notification.  
**Satisfaction or Feedback Information** can be captured using a completion survey for any curriculum either directly in the application or via a link sent in a notification.

# 1. Create Survey

Go to step 4 to edit existing survey

### A. Enter Title

Use a title to identify survey content for future recall

### B. From Scratch

Creates a new survey

### or B. From Existing

Copies questions, options and end page conditions  
Select existing survey

**Create Survey** Help | Manage Survey Folders + Add Survey

**New Survey Options**

Create a new survey either by starting from scratch or by copying an existing survey.

Title:\*

From Scratch -- Create a new survey from scratch (access key is s)

From Existing -- Copy questions, options, and page conditions from an existing survey (access key is e)

Survey: -- Please Select --

Cancel Save

# 2. Insert Questions

Click the **Insert** button from the Modify Survey screen to launch the Edit Survey Item screen.

Each survey can contain unlimited questions distributed amongst a number of pages.

**Edit Survey Item** Help | Survey List | Token Reference

**Create New Item** \* = Required

**Choose an Item Type**

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

Choice - Yes/No  or  or

OPEN TEXT REPLACEMENT TOKEN REFERENCE

**Question**

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

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

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

**Validation Options**

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

Default value. This value will be selected as the default for this question.

-- None --

Display type.\* Select the format for the response to the Yes/No question.

Drop Down

## Most Common Question Types

Other question types are described in the user manual

### Choice – Multiple Answers (Checkboxes)

Allows multiple selections, can be set as required and set a default value.

### Choice – One answer (option buttons)

Allows respondents to enter open ended text responses. Question can be set as required if necessary.

### Choice – True/False

Allows respondents to choose true or false answer in horizontal or vertical layout. Default value can be set and question can be set as required.

### Matrix – Rating Scale

Allows for rating in multiple columns and rows (such as Likert).

### Open Ended – Comments Box

Allows respondents to enter unlimited text characters. Default value can be set and question can be set as required.

\* Question – this text will display to the user as the survey question

Question Alias – do not use

Sub Text – displays underneath the question in the survey

### Validation options

Required – the user will be required to answer this question before continuing with the survey

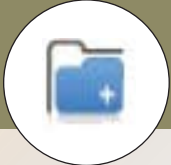
Default Value – allows for a default answer to be defined

\* Display Type – choices on the display of the answer selections

Drop Down – Places a drop down box below the question

Radio Buttons Horizontal – radio buttons next to each other horizontally

Radio Buttons Vertical – radio buttons, one on top of the other



## 3. Insert New Page

Enter multiple questions on a single page or click the **New PG** button to add multiple pages.

More than two questions per page may frustrate users who have to scroll too far down the page.

You may enter a page title and introduction for each page, or leave blank.

Page conditions can be inserted or updated by clicking the **Edit Page Properties** buttons that appear at the top of each page.

## 4. Open Survey

After adding all of your questions, return to the Manage Survey screen to turn the survey on.

Click the **Open** button on the line of your survey to change the status from Design to Open to make the survey ready to use.

| Manage                | Status | Title (click to preview)                 | Date Created | Design | Options | Deploy | Analyze | Archive | Delete | Clear |
|-----------------------|--------|--|--------------|--------|---------|--------|---------|---------|--------|-------|
| <a href="#">open</a>  | Design | What do expect to learn                  | 07/07/2011   |        |         |        |         | 0       |        |       |
| <a href="#">close</a> | Open   | Simple Survey to test start and end date | 07/05/2011   |        |         |        |         | 0       |        |       |
| <a href="#">open</a>  | Design | jim survey                               | 07/05/2011   |        |         |        |         | 0       |        |       |

## 5. Assign to Folder

Next, select the **Manage Survey Folders** link to define how you want to use the survey:

**Course** – This survey will be viewable on the Course Management page as an entrance or completion survey

**Generic** – This survey can be emailed to users but cannot be attached to a curriculum

**Learning Path** – This survey will be viewable on the Learning Path Management page as an entrance or completion survey

**Training Session** – This survey will be viewable on the Training Session Management page as an entrance or completion survey

| Folder           | Survey Title                                 | Date Created | Status |
|------------------|--|--------------|--------|
| --No Folder--    | What do expect to learn                      | 07/07/2011   | Open   |
| Course           | Simple Survey to test start and end date     | 07/05/2011   | Open   |
| Generic          | jim survey                                   | 07/05/2011   | Design |
| Learning Path    | New Hire Orientation - What Have You Learned | 06/27/2011   | Open   |
| Training Session | jim33  | 05/23/2011   | Open   |
| --No Folder--    | survey 22                                    | 05/23/2011   | Design |
| Course           | Course Survey by Greg                        | 05/18/2011   | Open   |
| Training Session | PreCooking Survey                            | 04/21/2011   | Open   |

Buttons: Back, Cancel, Save

## Additional Options

**Select the icon above** from the Survey List Screen to view and edit additional options.

**Start and End Time** - controls when the course will be available to be answered. The default is a start day of the day it is created and an end day of 12/31/9999. If the end date is passed, the user is not be able to complete the survey or any curriculum the survey is assigned to.

We recommend keeping the defaults for all other options.