vovici™

Feedback that drives vision.™

EFM Continuum

EFM Feedback User Guide

June 2007

For technical support please call: 1-800-787-8755

Or visit: www.Vovici.com

Printed in the United States of America
April 2007

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Table of Contents

Welcome to EFM Feedback

Vovici is pleased to announce the release of **EFM Feedback**.

With this new release, we have introduced many new features and you will notice major changes to the User Interface. This new design has been created to enhance the ease of use of the application as well as present a product environment that is easy to comprehend.

This EFM Feedback User Guide provides you details on all of the features of the EFM Feedback product. It also includes a Table of Contents, Glossary and Index for easy navigation to find what you need quickly.

Note: The current most up-to-date documentation source will always be the Online Help that accompanies the EFM Feedback Application as it is updated often.

The User Guide is broken down by tab section separators as well as chapters within those tabs. The main tabs (with chapter designations are listed below).

- **Getting Started**
  - Overview
  - System Requirements
  - Product Overview
  - Navigating in the New User Interface
- **Feedback**
  - Chapter One Feedback Home Page
  - Chapter Two Creating a Survey
  - Chapter Three Options Once You Create Your Survey
  - Chapter Four How to Add questions to Your Survey
  - Chapter Five Survey Question Types
  - Chapter Six Survey Question Editing
  - Chapter Seven Publishing Your Survey
- **Mailing Lists/Campaigns**
  - Chapter Eight Mailing List Home Page
  - Chapter Nine Invite People to Take Your Survey (Campaigns)
- **Survey Management**
  - Chapter Ten Survey Management
- **Survey Editing**
  - Chapter Eleven Survey Editing Properties
  - Chapter Twelve Survey Editing Actions
- **Analyzing/Reporting Your Results**
  - Chapter Thirteen Analyzing and Reporting Your Results
- **My Account**
  - Chapter Fourteen My Account Home Page
- **Administration**
  - Chapter Fifteen Administration Home Page
- **Polls**
  - Chapter Sixteen Polls
- Chapter Seventeen How Do I Login
- **Frequently Asked Questions**
- **Glossary/Index**

Getting Started Overview

We've created **Flash tutorials** to help you get started quickly and easily. Click the links to begin each video while in the Online Help System.

FLASH TUTORIALS

Four Phases of Survey Creation Tutorial
Survey Creation Tutorial
Mailing Lists/Campaigns Tutorial
Analysis Tutorial
Administration Tutorial

This section will help you get started using the **Vovici EFM Feedback** application quickly and easily. It contains information on the steps needed to get your survey up and running.

The primary steps to getting started are:

1. **Create your survey**
2. **Edit your survey**
3. **Publish your survey**
4. **Send invitations to users**
5. **Analyze your results**
6. **Report on your results**

Create your survey

The first time you view your survey workspace, chances are that the workspace is empty. If you have an empty workspace, then you will begin by clicking the Create New Survey button. You'll be presented with a selection page containing the following options:

Start with a blank survey
Build your survey by adding questions and response options. Questions can be manually added or selected and inserted from a question library.
Open a sample survey (not publishable)
Peruse our powerful analysis and reporting tools using the sample data provided.
Copy a survey
You can duplicate a survey that already exists in your account.
Create a survey from a template
You can select a survey template to use from our library, and then make edits as necessary.
Build a survey from a MS Word (.doc) file/Upload a WebSurveyor Desktop (.wsx) file
You can import a Word document as the basis for your survey, or upload a WebSurveyor Desktop file to work with.

There are various types of questions that can be used in your survey. To learn more about these question types, see the **Standard Question Types** topic.

Add questions to your survey by clicking on the **New Question** button when you select **Edit Survey**. You can also quickly create questions by using the Question Library feature.

After you have entered your questions you will want to confirm that your survey **Properties** information is correct. The **Title, Text & Limits** option contains fields for text that can be included in your survey as well as security settings that can be applied to control access to your survey. You can **Preview** your survey and try changing the **Presentation** options to enhance the display. Once you are satisfied with the look and feel of your survey, you're ready to publish it and start collecting results.

Publish Your Survey

The process of **publishing** your survey generates the survey link that will be provided to your end users. You provide this link to your survey recipients when you send them an invitation to take your survey.

Send Invitations to Users

Once your survey is published, you'll need to let your users know how to access and take your survey so you can begin collecting results. You can send invitations to users through our **Mailing Lists** feature, which allows you to send the survey to all your recipients at once and track status of your invitations. You'll see actual counts covering base number of recipients, number sent, number bounced, how many recipients clicked the URL and how many recipients submitted your survey.

Analyze Your Results

Once your survey is published and people have submitted the survey, you can begin to analyze the results. You can view your data in a variety of ways. You'll be able to create a variety of reports to view within the application or online (public report). You can filter your data and work with a subset of results, and you can view the raw data as well. For more detailed explanations, please view the **Analysis** section of Help.

The Survey Process

For a better understanding of the life cycle of a typical survey please see the **Product Overview**.

Additional Information for New Users

If you are new to Vovici, please visit the FAQ section.

System Requirements

HTML

All HTML code shall conform to **HTML 4.01 guidelines**.

Note!
All survey HTML generated by EFM Feedback conforms to HTML 4.01 guidelines and is Section 508 compliant. (However, this may not include HTML that a survey author adds or customizes.)

Survey Creation

Internet Explorer version 6.0 and higher
Firefox version 1.5 and higher

Survey Taking

Internet Explorer version 5.0 and higher
Firefox version 1.0 and higher
Safari version 2.0 and higher

Intranet Server Solution

Windows 2000 Server and Advanced Server (32-bit) is supported
Windows 2003 Server (32-bit only) is supported

Intranet Server System Requirements

Standard web browser
32-bit version of Windows 2000 or 2003 server platforms
Microsoft MSDE or SQL Server 2000
Microsoft IIS with ASP scripting enabled
Public IP Address
1GB system memory (2GB recommended)
Minimum of 150MB free disk space
Internet Connection
Server License Key (provided by Vovici)
Microsoft .NET Framework 2.0

Product Overview

In this topic we discuss the Survey Life Cycle process for Vovici EFM Feedback and Reporting. Our goal is to help you gain a better understanding of the product's inner workings.

We also want you to understand how each step of the process is important in helping you gather the information you need from your employees, clients and partners, which in turn will help you make well-informed decisions based on your survey results.

The Survey Life Cycle

There are typically five basic stages in the life cycle of a survey. For more information on each process, see the topics below.

1. **Edit Survey** - Edit and review your survey questions and properties.
2. **Publish Survey** - Create the link to make the survey available to users on the internet.
3. **Invite Respondents** - Create a Campaign and invite people to take your survey.
4. **Analyze Data** - Analyze and export your survey data.
5. **Create Basic Report** - Create, modify and make public your survey results. Create basic and advanced reports.

A survey begins when you create a new survey. When a new survey is created, it is stored in the **List Pane** of your **Feedback Page**. Once this survey has been finalized and tested and you are ready for people to take your survey, you **"publish"** it. Publishing a survey creates a copy of your survey in the **Published Area**, and creates the URL (link) that you send out to people in your invitation message campaign.

Note!
Any changes you make to your working version will not appear in the public version until you "republish" the survey.

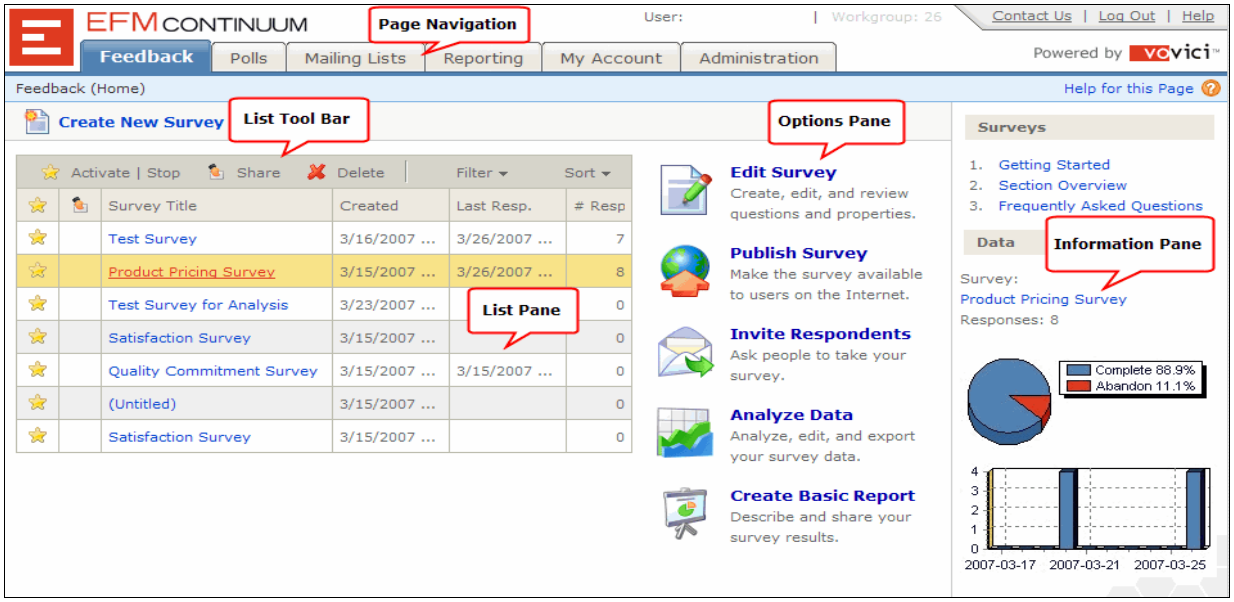
Once the survey has been published the response collection period begins. As soon as the survey starts collecting responses, you can begin **analyzing the results**.

See related topics: **View/Edit the Data**, **Reset Results**

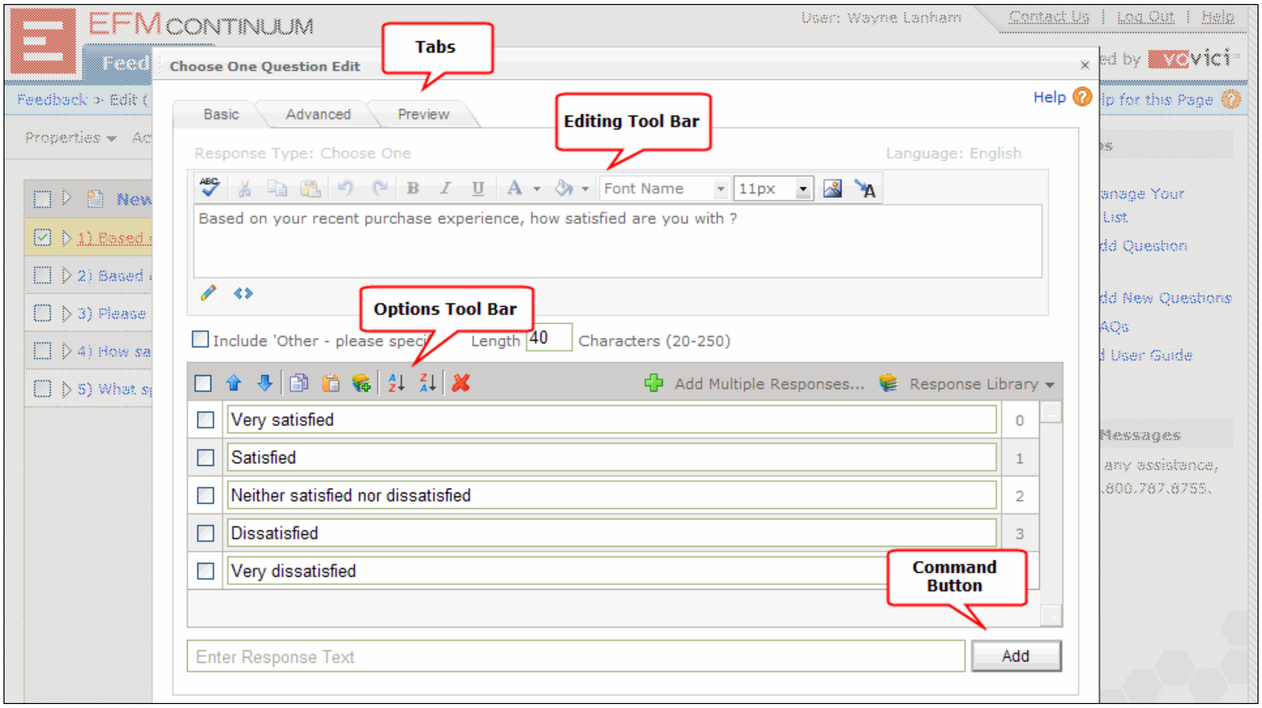
Navigating in the New User Interface

Naming Conventions and the New User Interface

Provided below is a screen shot of the New User Interface along with the Naming Conventions that have been applied for each section. Become familiar with this terminology as it will aid you in getting started quickly and navigating to where you want to be. These terms are used throughout the Help System.



Feedback Page



Question Editor Dialog

Navigating in the Online Help System

About Context Sensitive Help

With the release of EFM Feedback, Vovici has introduced a new Context-Sensitive Help System. The term “Context-Sensitive” Help means that help is available from within the Application itself. You can get help quickly anytime by accessing help through links and icons on your screen throughout the application.

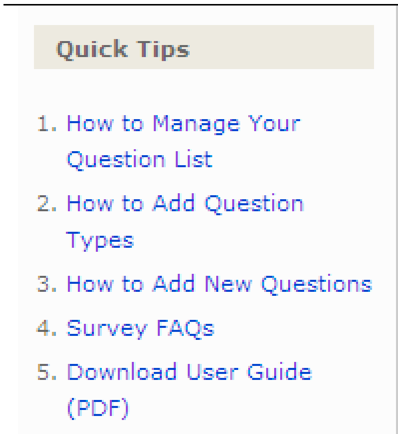
Help Link	Description
Help	Displays the complete help system
Help with this Page	Displays a context-sensitive help topic relevant to your current task
	Displays a context-sensitive help topic relevant to your current task
	Quick tips are available throughout the application and they are relevant to where you currently are in the application. Click the tip title and that topic will display in a separate window. You also have Frequently Asked Questions (FAQs) available. Click this link and a list of FAQs is displayed relevant to where you are in the application. The complete User Guide (PDF) can be downloaded to a location of your choice. Click this link and you are asked if you want to save or open the file.

Table of Help Links

The EFM Feedback Help system covers all of the main functional areas of **Feedback, Polls, Mailing Lists, My Account and Administration**. It is then broken down into individual concise topics to provide comprehensive coverage of all of the features of the application.

The Help system is displayed in a Tripane format environment. There is a Navigation Bar along the top that houses the Contents, Index, Glossary and Search buttons. The Contents button is selected by default when the help opens, therefore, the table of **contents** displays in the left Navigation Pane. The right pane is the **Topic Information Pane** and displays the topic details of the current topic that you have selected from the Contents within the Navigation Pane.

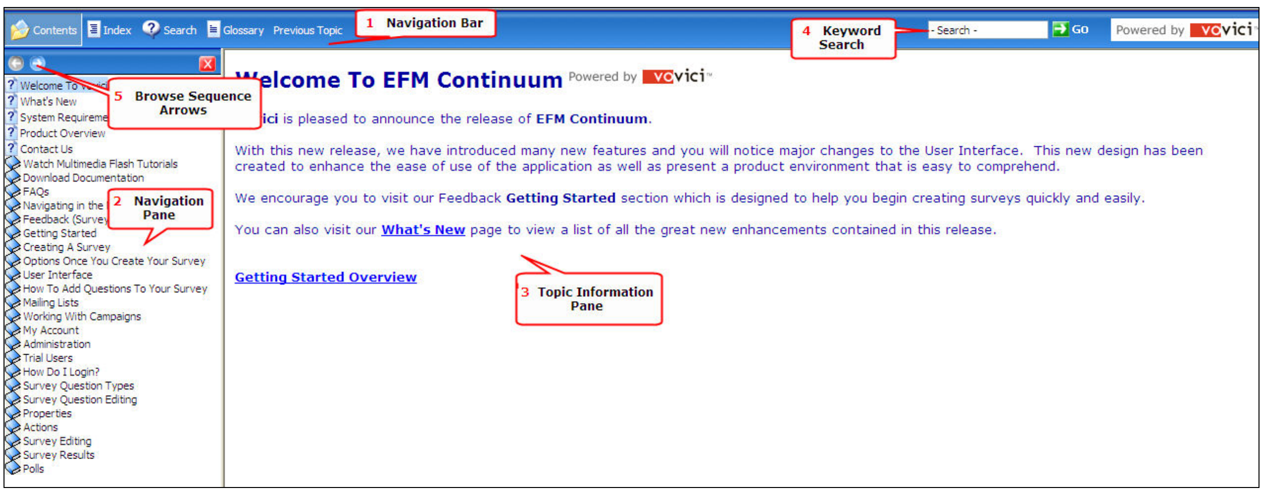
The Table of Contents format is broken down into 'books' with related topics under each book. You simply click a book to view topics within that book structure and click a topic and it is displayed in the Topic Information Pane on the right.

Within each topic there are links to other related topics to the current subject matter. You click the link to go directly to that topic and click the “Previous Topic” button in the Navigation Bar to return to your original topic. **Note:** You can also right click in the Information Pane and select back to return to your original topic.

There is a 'welcome' page that guides the user to 'Getting Started' and 'What's New' topics. From within these topics the user is linked to other related topics if they feel they need additional information.

Screenshots are included in most topics to give the user a visual reference. The system also has “Show Me” links. “Show Me” links are simply links to a screen shot that pops up for quick reference and closes once you click out of the popup area. They provide the user a quick look at what the documentation text is referencing.

Tripane Window Environment and Help Details



EFM Feedback Help System

The Tripane Window Environment includes

1. A Navigation Bar
2. A Navigation Pane
3. A Topic Information Pane
4. Keyword Search
5. Browse Sequence Arrows

1. Navigation Bar

Button	Description
Contents	The help system opens with the Table of **Contents** showing in the Navigation Pane. This is the default. The Table of Contents provides you navigation throughout all of the help topics. Click on any topic in the **Contents** and that topic is displayed in the Topic Information Pane.
Index	Select the Index button if you want to see a full index of all of the topic keywords contained in the help system in alphabetical order. Once the Index button is selected the index displays in the Navigation Pane. You can click on any word in the Index and you will be taken to the topic that contains that index word.
Search	Select the **Search button**, if you want to conduct a keyword search in the help system. Click Search and the search text box opens. Type in the word(s) you want to search for in the text box and click the Go button. You will be presented with a list of topics where your search word was found. Click any topic and that topic will be displayed in the Topic Information Pane.
Glossary	Select the Glossary button if you want to see a Glossary of terms along with their definitions that are used throughout the Help System.
Previous Topic	The **Previous Topic** button takes you back to the topic you viewed previous to the one you are currently in. There is no limit as to how many times you can click this button (except when you get back to your original topic and there are no other topics in your back history) For example, if you clicked around in the navigation pane on several different topics and you wanted to get back to your original topic you clicked first, you just click the **Previous Topic** button until you get back to where you want to be. You can also use the Table of **Contents** to take you back, simply click on the topic in the Navigation Pane and that topic is displayed.

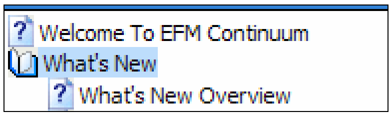
Navigation Bar Table

2. Navigation Pane

The **Navigation Pane** contains specific information depending on what button is selected in the **Navigation Bar**. The choices are Contents, Index, Search, and Glossary. These buttons are explained in the Navigation Bar table above.

When the Navigation Pane displays the table of contents, you simply click the topic that you want to see and it is displayed in the Topic Information Pane.

There are ? icons that represent a topic and book icons that represent a folder that contains topics. If you click a topic that has the ? icon, that topic displays in the Topic Information Pane. When you click the book icon it displays all of the topics contained in that book. Then you select a topic and it displays in the Topic Information Pane.



Topic and Book Icons

3. Topic Information Pane

The **Topic Information Pane** is used to display topics. You use this area to read the current topic and link to other related topics from within this area as well.

Throughout the help topics you will come across "See Also" links. These are links to other topics that are related to the topic you are currently in. Click the topic subject and that topic will display.

4. Keyword Search

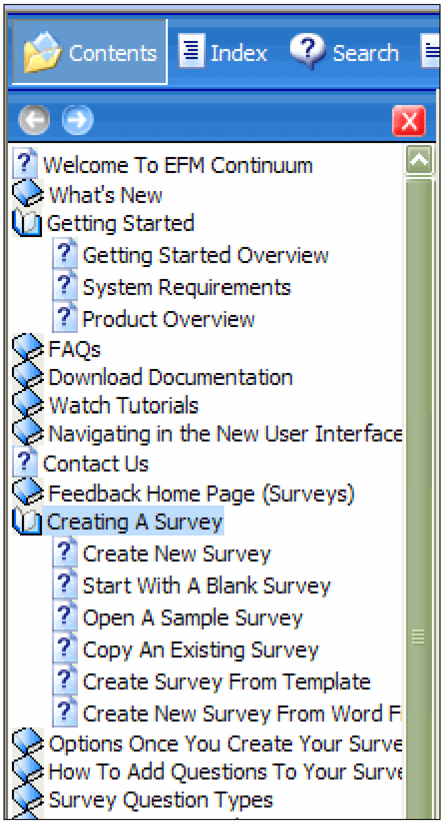
Keyword search is used to search for key terms within the Help system. There are two ways to start a search. You click inside the Keyword Search text box, type your word(s) and select Go. Or you click the "Search" button on the Navigation Bar and the search text box opens in the Navigation Pane and you type your word(s) and select Go.

You will be presented with a list of topics where your search word was found. Click any topic and that topic will be displayed in the Topic Information Pane.

5. Browse Sequence Arrows

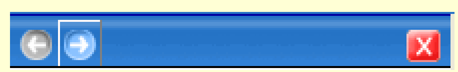
Browse Sequence Arrows

The arrows located in the screen shot above are your Browse Sequence Arrows. When you click a topic in the Navigation Pane, that topic displays. If you click on a topic that is under a book icon, that topic displays, and you have the option to use the Browse "Sequence Arrows" to browse to the next topic in the book sequence. Simply click the arrows back and forth to navigate through the book of topics. The left arrow takes you back a topic and the right arrow takes you to the next topic in the sequence.



Book and ? Icons

Tips:

You can close the navigation pane by selecting the  **red X. You can reopen by clicking the contents button on the navigation bar.**

You can also resize the Navigation Pane by placing your mouse on the vertical line that separates the Navigation Pane from the Topic Information Pane. When you see the double arrows appear, left click and drag the line to the left or right depending on if you want to make it smaller or larger respectively.

Chapter One

Surveys/Feedback Overview

Discussed in this Chapter

- Main Surveys Page
- List Pane
- Options Pane
- Info Pane

Feedback Home Page (Surveys)

Feedback Page (Surveys)

Use: The **Feedback Page** is the default landing page that displays when you login to your account. A list of your surveys is shown and there are various actions that can be taken for a survey.

There are **navigation tabs** across the top of the page to take you to other major functions of the application.

The tabs are as follows:

- Feedback
- Polls
- Mailing Lists
- Reporting
- My Account
- Administration

Navigation Tabs

Directly under the **Navigation Tabs** is the **Create New Survey** button.

To create a new survey, make a copy of an existing survey, or open a sample survey, click the **Create New Survey** button. For more information, please go to Getting Started.

The **Feedback Page** is broken up into panes, each giving you access to information about your account and your surveys.

The **Feedback Page** contains:

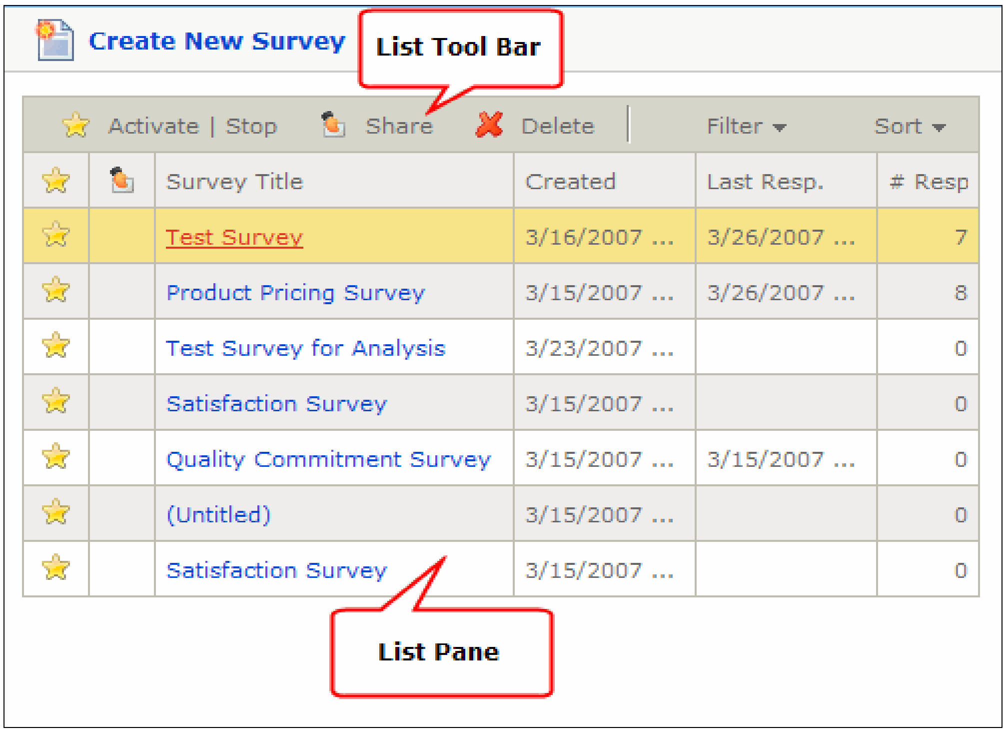
- **List Pane**
- **Options Pane**
- **Info Pane**

Visit the topics above for more information.

List Pane

The **List Pane** is located on the left side of the **Feedback Page**. The **List Pane** displays a list of your current surveys and their status.

The **List Tool Bar** controls actions that can be taken against your survey, as well as additional information on each survey including the survey title, the date it was created, the date of the last response received and the number of responses. Icons displayed to the left of the survey name show its status.



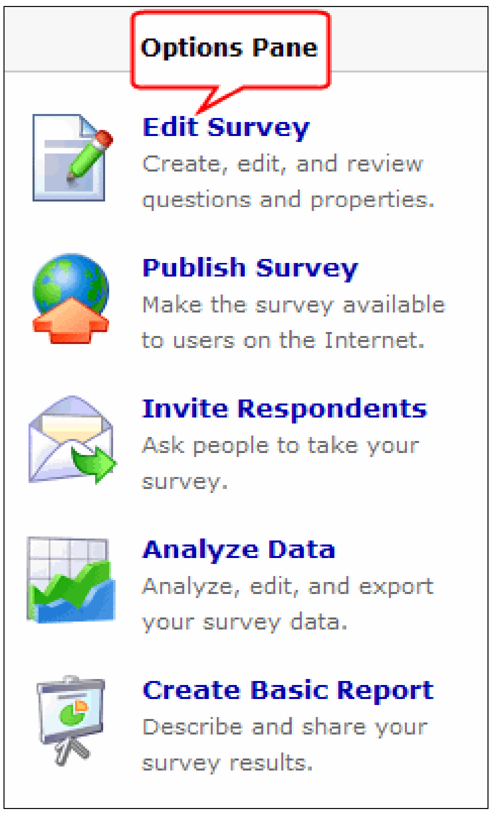
Feedback List Pane

Options Pane

The **Options Pane** is located in the center of the main **Feedback Page** and contains links to the five options that are available to you once you create a survey. Visit the topics below for more information.

- **Edit Survey**
- **Publish Survey**
- **Invite Respondents**
- **Analyze Data**
- **Create Basic Report**

The options will be available according to the current stage of your survey.

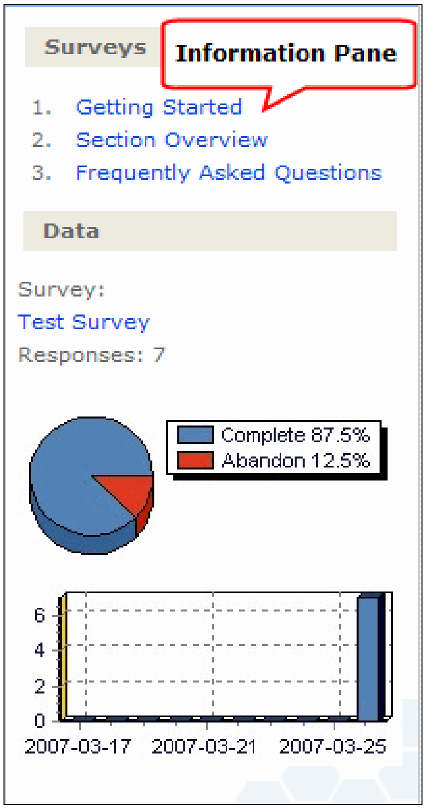


Feedback Options Pane

Information Pane

The **Info Pane** is located on the far right of the main **Feedback Page** and displays a graphical representation of the survey that you have currently selected in the **List Pane**. An example is shown below.

The survey name will be shown and the number of total responses received. The graph will show when responses were received, and provide percentages for completion and abandonment of the survey.



Feedback Info Pane

Chapter Two

Creating a Survey

Creating a Survey

Create New Survey

From the **Feedback Home Page**, click the **Create New Survey** button, and then create your survey by selecting one of the following options from the Create Survey Wizard dialog:

Start with A Blank Survey
Begin to build your survey by adding questions and response options. Questions can be manually added or selected from a question library.

Open a Sample Survey (Not Publishable)
View our powerful analysis and reporting tools using the sample data provided.

Sample surveys can be edited but cannot be published. If you want to base your survey off the sample, you must first copy the sample survey. The copy will be treated as a new survey and editing/publishing access will be available as normal.

Note!
Remember that you must first add the Sample Survey to your account through 'Create New Survey' before you can copy it.

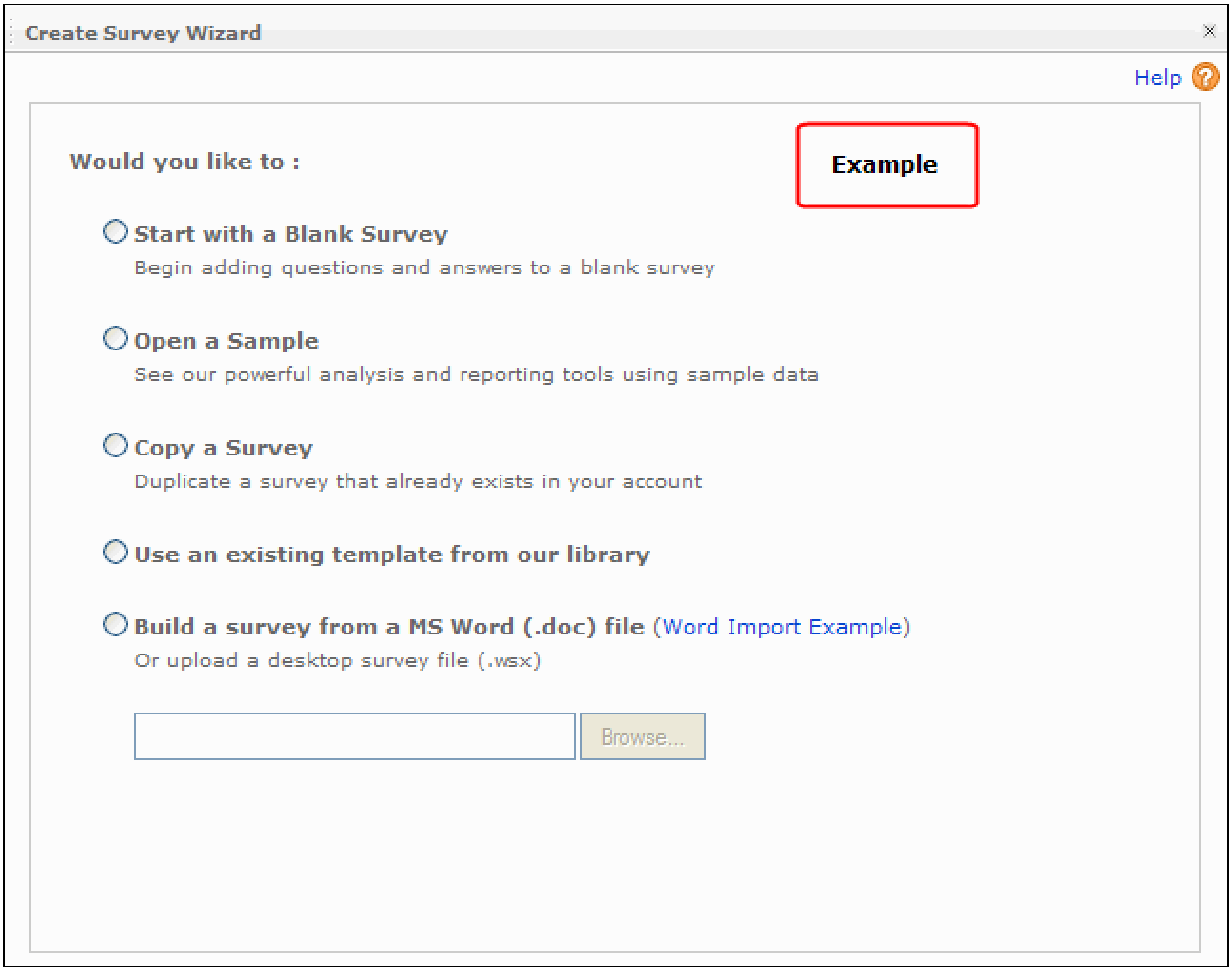
Copy a Survey
You can duplicate a survey that already exists in your account. A new, unpublished survey will be created.

Note!
The responses that were included with the original survey will not be carried over to the new survey.

Create a survey from a template
You can select a survey template from our library and make any edits you desire.

Build a survey from a MS Word (.doc) file / Upload a WebSurveyor Desktop (.wsx) file
You can import a Word document as the basis for your survey, or upload a WebSurveyor Desktop survey file to work with.

Use the **Browse** button to locate the Word file you want to use.



Create Survey Wizard

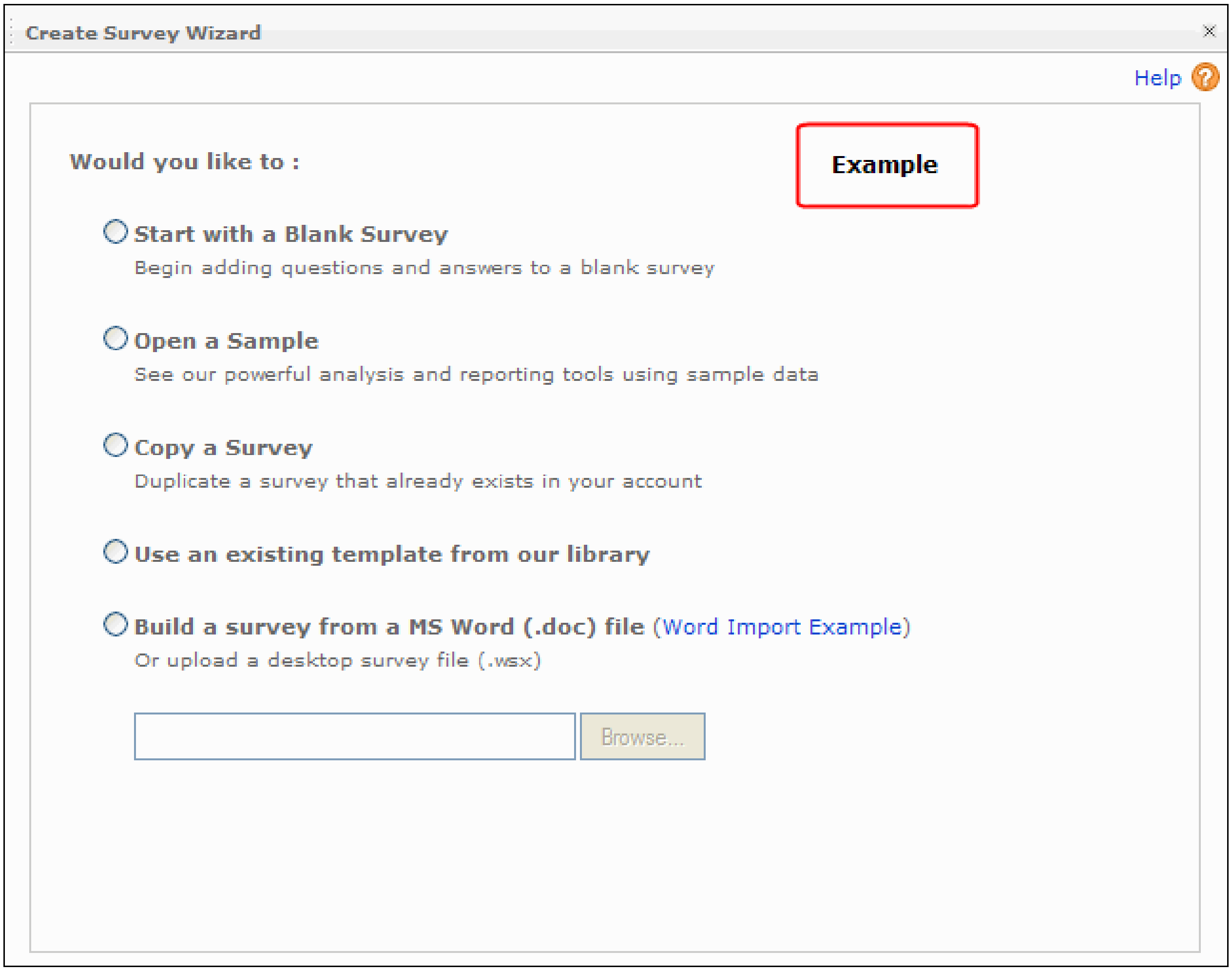
Start with a Blank Survey

You can build your survey by adding questions and response options. Your questions can be manually added or selected from a question library.

Steps

1. From the main **Feedback Page**, click **Create New Survey**.
2. From the Create Survey Wizard dialog, select **Start with a Blank Survey**.
3. Click **OK**.
4. A dialog to ***Enter the survey details*** is displayed.
5. Fill in your **Survey Title**.
6. Enter an **Introductory message**. This is the text that will be displayed at the beginning of your survey. Example: Please take my survey.
7. Enter a **Closing message**. This is the text that will be displayed at the end of your survey. Example: Thank you for taking my survey.
8. You can enter descriptive comments for your own use in the **Comment** text box.
9. Click **Finish**.
10. Click **New Question** to start adding questions to your survey.

Note!
Entering your survey title, introductory or closing message is optional at this point. You can enter them here, or they can be entered through the Title, Text & Limits option under Properties when you select Edit Survey.



Create Survey Wizard

Open a Sample Survey

Your sample surveys are completed surveys that include sample results. They provide valuable information that helps you build your own surveys.

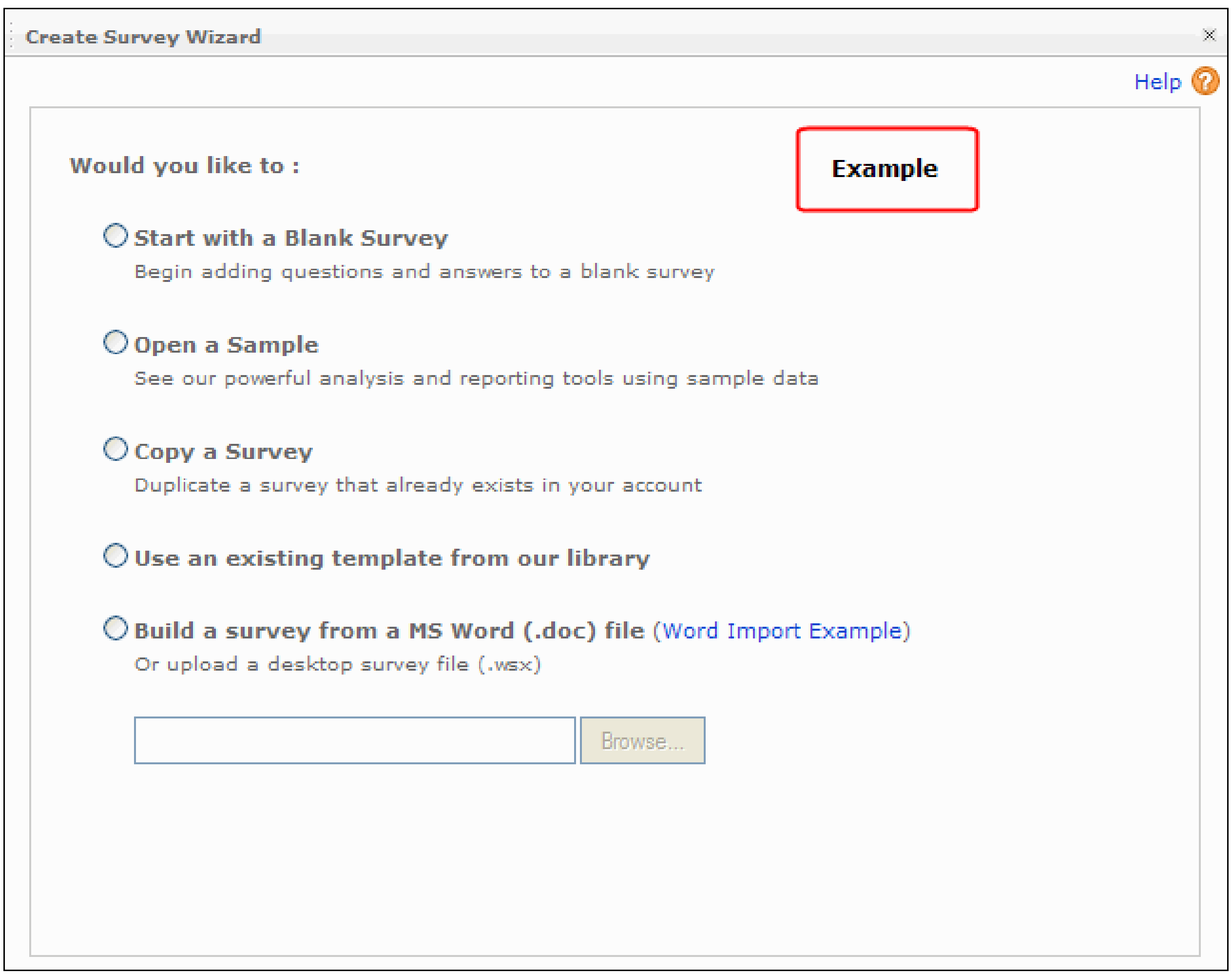
Sample surveys also help you test the functionality of the tool, and experience the capabilities of the Analysis and Reporting options.

You can copy and edit sample surveys.

Note!
A sample survey cannot be published.

Steps

1. From the main **Feedback Page**, click **Create New Survey**.
2. From the Create Survey Wizard dialog, select **Open a Sample**.
3. Click **OK**.
4. Select the sample survey to be added to your account.
5. Click **Open Sample**.



Create Survey Wizard

Copy an Existing Survey

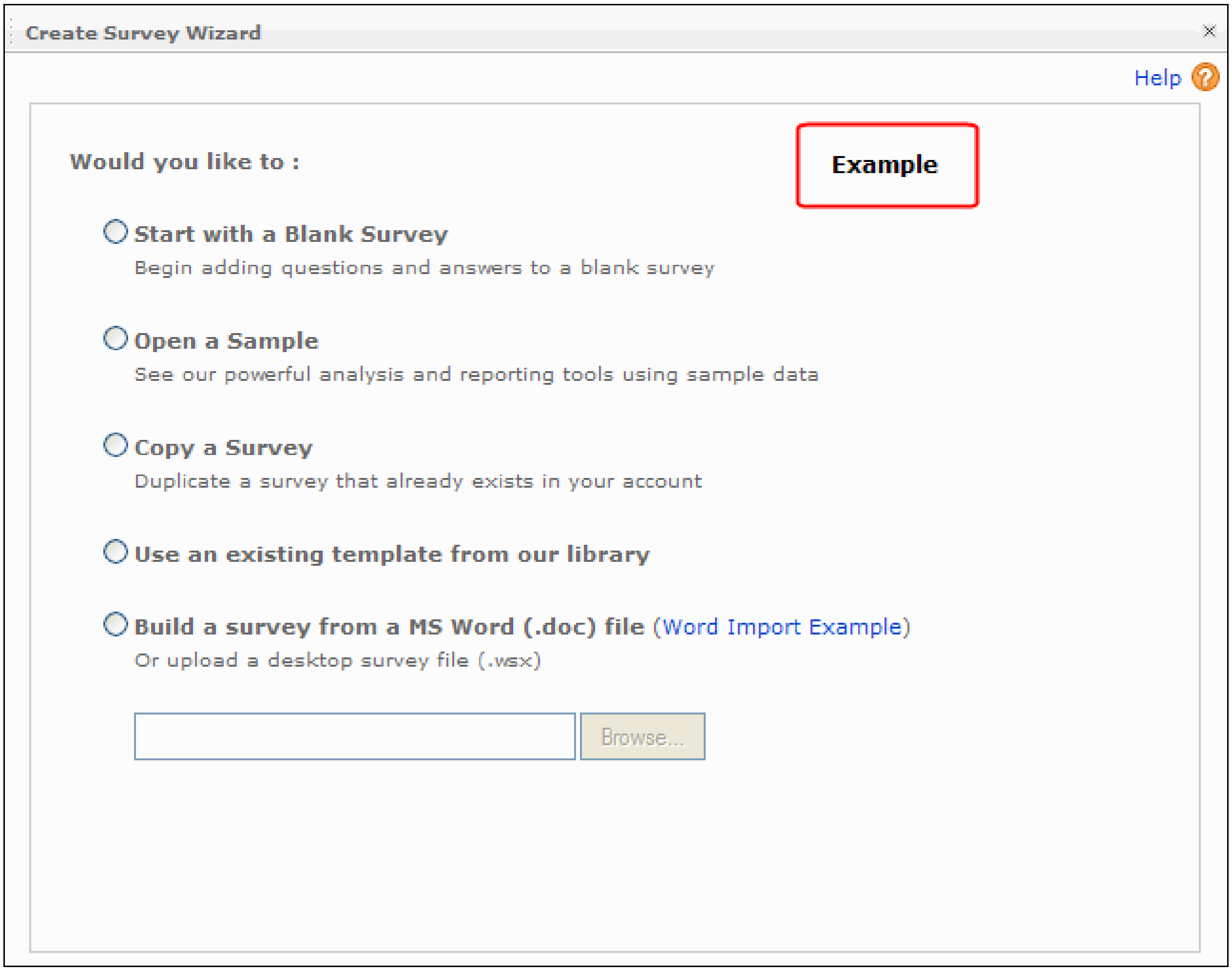
You can use the **Copy a Survey** option to duplicate an existing survey in your account.

To copy an existing survey

1. While in the main **Feedback Page**, click the **Create New Survey** button.
2. From the Create Survey Wizard dialog, select **Copy a Survey**.
3. Click **OK**.
4. A dialog box displays with a list of your current surveys. Select the survey you wish to copy from the list.
5. Click **Next**.
6. A dialog to ***Enter the survey details*** is displayed.
7. Fill in your **Survey Title**.
8. Enter an **Introductory message**. This is the text that will be displayed at the beginning of your survey. Example: Please take my survey.
9. Enter a **Closing message**. This is the text that will be displayed at the end of your survey. Example: Thank you for taking my survey.
10. You can enter descriptive comments for your own use in the **Comment** text box.
11. Click **Finish**.
12. You are now taken to the **Question List Pane** where you can begin editing your survey.

Note!
If you decide not to enter a title for your survey and the survey was previously published, the name will show in the survey list as (Untitled)(##.htm), where '##.htm' represents the last node in the survey URL.

If you decide not to enter a title for your survey and the survey has never been published, it will show in the list as (Untitled).



Create Survey Wizard

Create a Survey from a Template

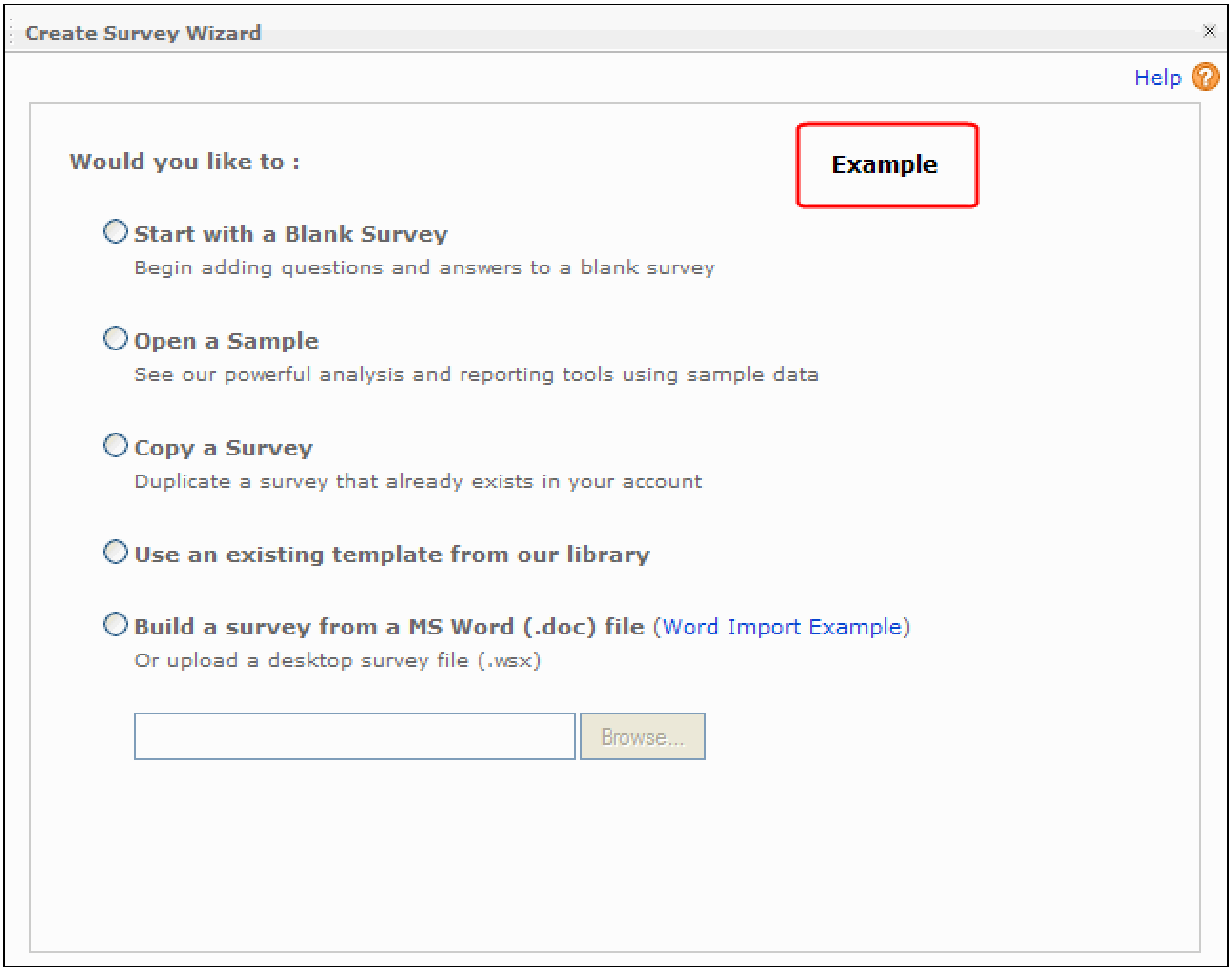
You can create your survey by using one of the existing predefined templates from our library.

When a survey is selected from within a category, a brief description of what it contains is displayed.

Steps

1. From the main **Feedback Page**, click **Create New Survey**.
2. From the Create Survey Wizard dialog, select **Use an existing template from our library**.
3. Click **OK**.
4. Select a template **category**, click **Next**.
5. A dialog box displays with the surveys that are available.
6. Select one of the survey templates within that category, click **Next**.
7. Enter text for ***Survey specific parameters***, click **Next**.
8. Select a template for your survey from the ***Survey presentation*** dialog box. Once you select a template, a preview of that template is displayed in the box to the right.
9. Click **Next**.
10. Fill in your **Survey Title**.
11. Enter an **Introductory message**. This is the text that will be displayed at the beginning of your survey. Example: Please take my survey.
12. Enter a **Closing message**. This is the text that will be displayed at the end of your survey. Example: Thank you for taking my survey.
13. You can enter descriptive comments for your own use in the **Comment** text box.
14. Click **Finish**.

Note!
Entering your company name, survey title, introductory or closing message is optional at this point. You can enter them here, or they can be entered through the Title, Text & Limits option under Properties when you select Edit Survey.



Create Survey Wizard

Create a New Survey from a MS Word File

You can create a survey in your account from a **MS Word** file.

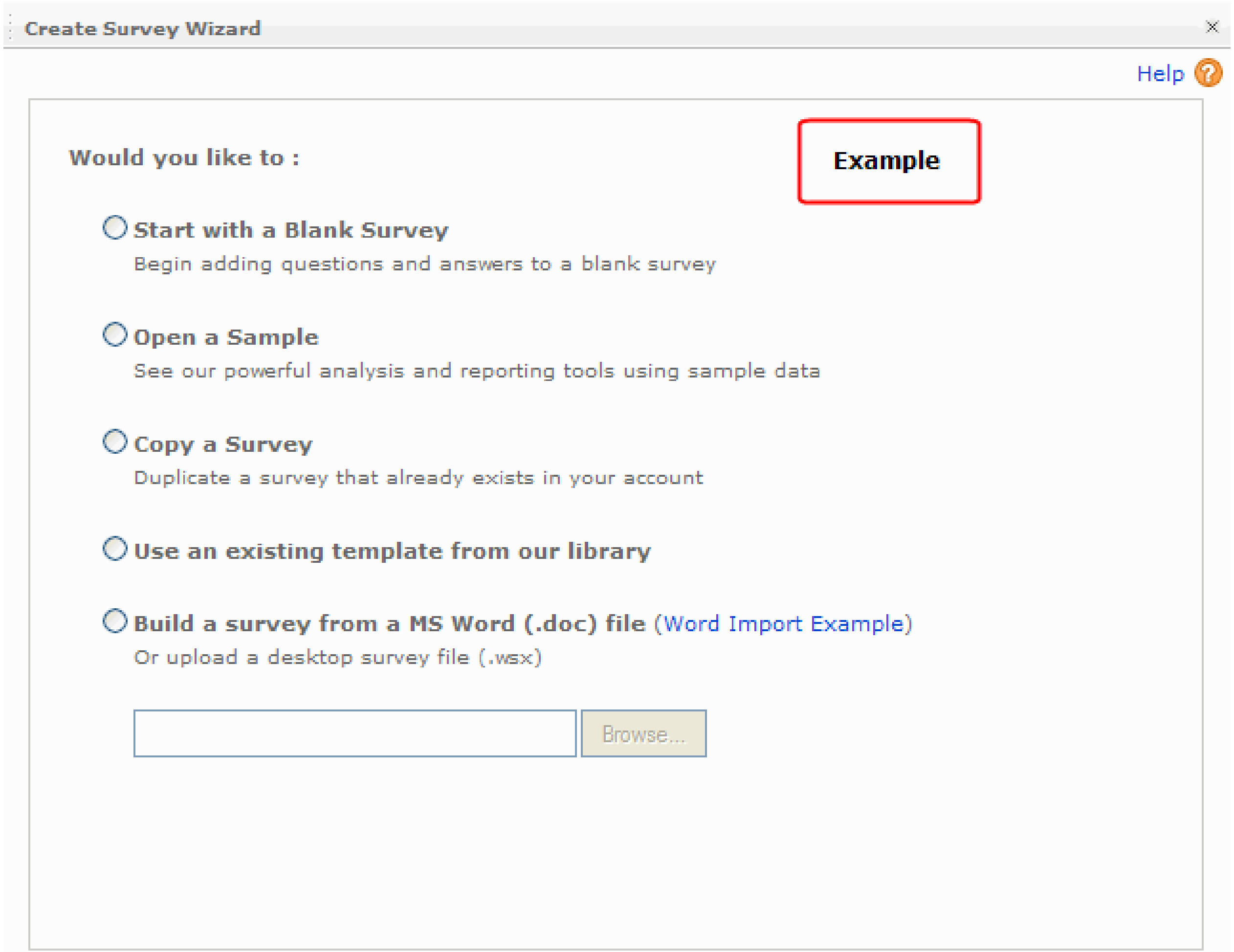
Note!
Your MS Word document must be properly formatted in order for survey questions to import correctly.

See related topics: **Importing a Survey from a Word Document**, **Creating Survey Questions Using MS Word**

Steps

1. From the main **Feedback Page**, click **Create New Survey**.
2. From the Create Survey Wizard dialog, select **Build a survey from a MS Word (.doc) file**.
3. Click **Browse** to navigate to the **MS Word** file you want to use.
4. Click **OK** to import the **MS Word** file into the application.
5. You will be placed in the **question list** where you can begin to edit the survey.

Note!
You can also upload a WebSurveyor Desktop survey file (.wsx) using this same procedure.



Create Survey Wizard

Importing a Survey from a Word Document Overview

You can create a survey by importing a properly formatted **MS Word** document into EFM Feedback. Basic formatting requirements for your MS Word document are described below. For detailed information about properly formatting your questions and responses in MS Word refer to the '**Creating Survey Questions Using MS Word**' topic.

See related topics: **Create New Survey from Word File**, **Creating Survey Questions Using MS Word**

Note!
EFM Feedback is compatible with MS Word versions 97 through 2003.
For the best results in survey creation, Vovici recommends you use the EFM Feedback tool to create your surveys.

If you choose to design surveys in MS Word, check the following default options in MS Word to ensure proper survey formatting.

In MS Word, select **Tools | AutoCorrect Options** from the menu bar.

- On the **AutoCorrect** tab, clear the check box for 'Capitalize first letter of sentences.'
- On the **AutoFormat As You Type** tab, clear the check boxes for 'Automatic bulleted lists,' 'Automatic numbered lists' and 'Border lines.'

Formatting Requirements

Formatting	Description
Page break	To add a page break to the survey, simply add a page break in MS Word. Either **Ctrl+Enter** or **Insert | Break**, **Page Break**.
S. or **s.** (Section)	A section is used to separate areas within a page. A section begins with **S.** or **s.** Text imports as an HTML snippet. ****Note:** Space should be manually added after the section header by coding a hard return (** **) in MS Word, or by enclosing your section text inside HTML paragraph tags (** *section text here* **). You can also add hard returns (hit **Enter** key) when editing the HTML Snippet in EFM Feedback.
Text formatting	We currently support **Bold** *Italic* Underline Subscript Superscript **Color** and Highlight. Additional formatting properties may easily be added within EFM Feedback. We also support Unicode.

Basic Formatting Requirements

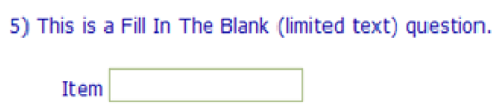
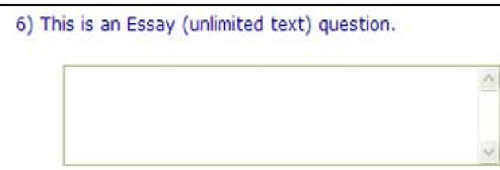
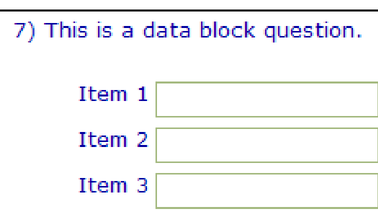
Creating Survey Questions Using MS Word

What You Will Enter in MS Word	What You Will See in EFM Feedback	Notes
Question Headings		
1. This is my question text. **2)** This is my question text.	1) This is my question text. 2) This is my question text.	Each question must start with a **question heading**. A **question heading is designated by a number** and must be followed by a period or by a right parenthesis. In the question heading example please note that it does not matter if you use a period or right parenthesis in MS Word, they both invoke the same output in EFM Feedback which is a numbered question with a parenthesis as this is the default setting.
Alert! **Questions must have response options defined or they will be displayed as HTML snippets in EFM Feedback even when a question heading is used.** **The auto-numbering feature in MS Word cannot be used to set up the survey questions.**		
HTML Snippet		
This is an HTML snippet.	This is an HTML snippet.	Any text that is not related to a question heading will be imported as an HTML Snippet (plain text).

What You Will Enter in MS Word	What You Will See in EFM Feedback	Notes
	Question Examples	
Choose One (show all) Question		
m Choice 1 m Choice 2 m Choice 3 m Other __________ OR () Choice 1 () Choice 2 () Choice 3 () Other __________	○ Choice 1 ○ Choice 2 ○ Choice 3 ○ Other (please specify) If you selected other, please specify:	This is a **Choose One (show all)** question. An "Other" may be included by adding a series of underscores to a choice. Only a single "Other" is supported, so more than one will be ignored
Choose One (horizontal display) Question		
m Choice 1 **<tab>** m Choice 2 **<tab>** m Choice 3 OR () Choice 1 **<tab>** () Choice 2 **<tab>** () Choice 3	○ Choice 1 ○ Choice 2 ○ Choice 3	This is a **Choose One (horizontal display)**. **Alert!** **Use <u>tabs</u> to separate the response options in MS Word to ensure that they will display correctly when imported into EFM Feedback.**

Tip!
The layout for response options for Choose One questions can also be changed in the question editor within EFM Feedback to display the response options in a *horizontal*, *vertical* or a *drop-down list* format. The change is made on the <u>Advanced tab</u> when editing the question.

Choose All That Apply Question		
q Choice 1 q Choice 2 q Choice 3 q Other __________ OR [] Choice 1 [] Choice 2 [] Choice 3 [] Other __________	☐ Choice 1 ☐ Choice 2 ☐ Choice 3 ☐ Other (please specify) If you selected other, please specify:	This is a **Choose All That Apply** question. An "Other" may be included by adding a series of underscores to a choice. Only a single "Other" is supported, so more than one will be ignored.

What You Will Enter in MS Word	What You Will See in EFM Feedback	Notes
Choose All That Apply (horizontal display) Question		
q Choice 1 **<tab>** q Choice 2 **<tab>** q Choice 3 OR [] Choice 1 **<tab>** [] Choice 2 **<tab>** [] Choice 3		This is a **Choose All That Apply (horizontal display)** question. **Alert!** **Use <u>tabs</u> to separate the response options in MS Word to ensure that they will display correctly when imported into EFM Feedback.**
Tip! **The layout for response options for Choose All That Apply questions can be changed in the question editor within EFM Feedback to display in a *horizontal* or *vertical* layout. The change is made on the <u>Advanced tab</u> when editing the question.**		
Fill In The Blank (limited text) Question		
5. This is a **Fill In The Blank (limited text)** question. Item ________________		This is a **Fill In The Blank (limited text)** question. The number of underscores you enter determines the length of the text.
Essay (unlimited text) Question		
6. This is an **Essay (unlimited text)** question. __________________		Please note that the line representing the text input area is entered with no text preceding it.
Data Block Question		
7. This is a **data block** question. Item 1 ______________ Item 2 ______________ Item 3 ______________		This is a **data block** question. The number of underscores you enter determines the length of the text. All the items are created and defined as **Text**.

Matrix Questions

To define a **matrix** question in MS Word, you will need to set up the question categories and the response/rating options in a **table**. In MS Word, go to the **Table** menu at the top of your screen and click on **Insert Table**. Designate the number of columns and rows as needed - generally, one (1) row and two (2) columns for standard matrix questions. A side-by-side matrix question will require additional columns and/or rows depending on the parameters of the question.

Choose One Matrix Question

What You Will Enter in MS Word

8. This is a **Choose One Matrix** question.

This software That software Other software	m Very Poor m Poor m Average m Good m Very Good

Note!
The column on the left represents the matrix categories.
The column on the right represents the rating choices that will be applied to the categories.
In a Choose One Matrix question, the choices may be defined using *m* or *()*.

What You Will See in EFM Feedback

8) This is a **Choose One Matrix** question.

	Poor	Very Poor	Average	Good	Very Good
This software	○	○	○	○	○
That software	○	○	○	○	○
Other software	○	○	○	○	○

Choose All That Apply Matrix Question

What You Will Enter in MS Word

9. This is a **Choose All That Apply Matrix** question.

This software That software Other software	q Choice One q Choice Two q Choice Three q Choice Four q Choice Five

Note!
The column on the left represents the matrix <u>categories</u>.
The column on the right represents the <u>rating choices</u> that will be applied to the categories.
In a Choose All That Apply Matrix question, the choices may be defined using *q* or *[]*.

What You Will See in EFM Feedback

9) This is a **Choose All That Apply Matrix** question.

	One	Two	Three	Four	Five
This software	☐	☐	☐	☐	☐
That software	☐	☐	☐	☐	☐
Other software	☐	☐	☐	☐	☐

Chapter Three

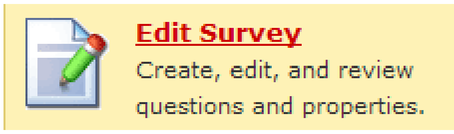
Options Once You Create Your Survey

Discussed in this Chapter

- Edit Questionnaire
- Publish Survey
- Send invitations
- Analyze & Export
- Reports

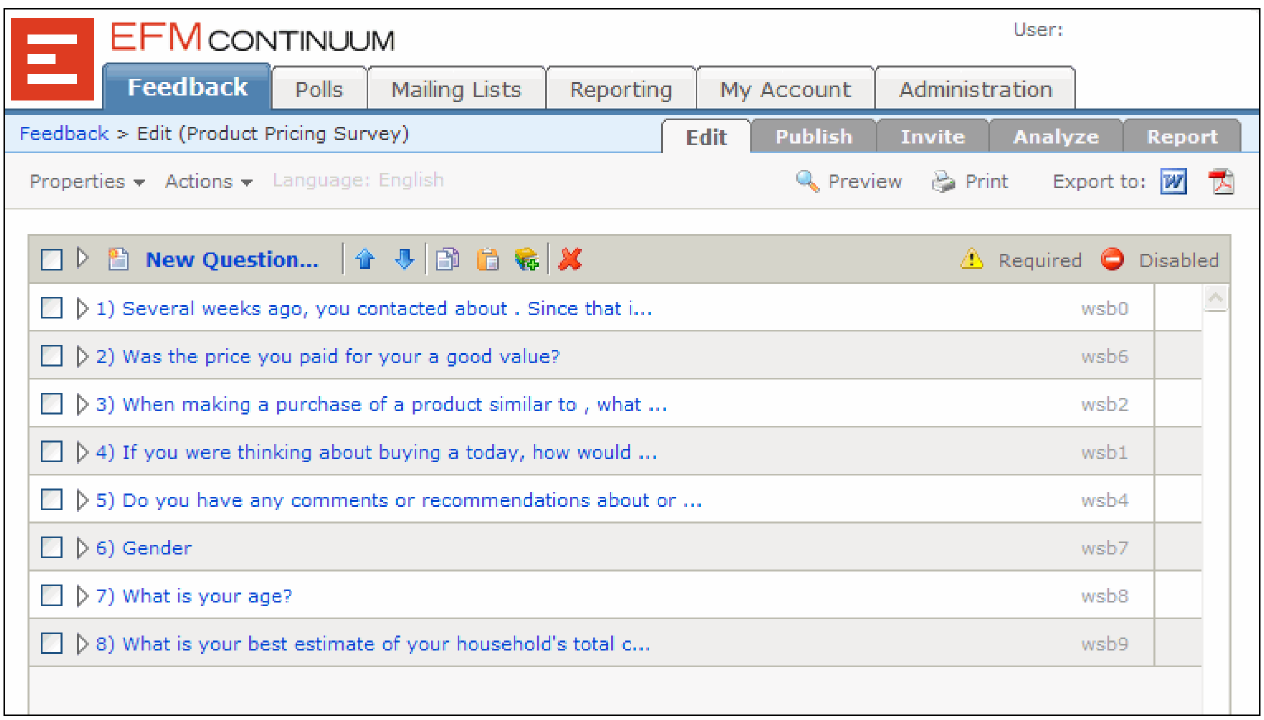
Options Once You Create Your Survey

Edit Survey



Edit Survey contains all of the editing functions that you use when you create and build your survey, or need to edit one that already exists. When you select Create New Survey, or select an existing survey to edit, you are placed in the **Question List Pane**, which is the main working area for creating your survey questions, editing them, and setting up their specific properties.

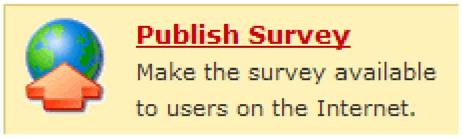
From this area, you can add new questions, manipulate existing questions, preview your survey to see how it will look to your users, Print your survey, and even export your work to a MS Word or an Adobe PDF file.



Question List Pane

For more information, you can check the **Managing the Question List** and **Standard Question Types** topics in the Help system.

Publish Survey



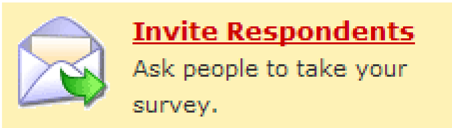
Once your survey has been finalized you will need to **publish** it to make it available to your users. The publishing process produces the link to be used to access the survey.

Steps

1. Go to the **Feedback Page**.
2. Select the survey you want to publish from the **Feedback List Pane**.
3. With the survey highlighted, select **Publish Survey** from the **Options Pane**.
4. Click the **Publish** button in the upper left corner of the tool bar.

For more detailed information on the publishing process, see **Publishing / Republishing Your Survey**.

Invite Respondents



Once your survey has been published, you can use the **Invite Respondents** feature to invite users to take the survey.

There are four methods that can be used to invite users to participate in your survey. Click on **Hyperlink**, **Popup Invitation** or **Popup Survey** to expand these options and see more details. The four methods are:

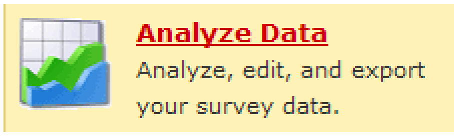
1. **Email List** - Use the **Mailing Lists** tool to send out an E-mail invitation and track user statistics such as the date the invitation is sent, who clicked on the survey link, who completed the survey and which E-mail addresses are not valid. Vovici strongly recommends this option to send invitations to your survey audience.

2. **Hyperlink (HTML)** - Use this snippet of code wherever HTML is supported, such as a web page, when you want people to **click on a link** to open the survey. This method WILL work with popup blockers.

3. **Popup Invitation (HTML)** - Use this snippet of code wherever HTML and JavaScript are supported, such as a web page, when you want to display a **popup dialog box** asking someone to take your survey. Please note that popup blockers may prevent this method from working as expected.

4. **Popup Survey (HTML)** - Use this snippet of code wherever HTML and JavaScript are supported, such as a web page, when you want to **open a new window** to your actual survey. Please note that popup blockers may prevent this method from working as expected.

Analyze Data



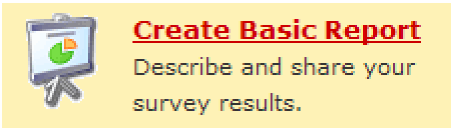
Once your survey has started to collect responses, you can use the **Analyze Data** option to analyze your data in a variety of ways.

The **Analyze Tab** contains various options for viewing your data within the application. Results are graphed for individual questions. You can set up the chart type and properties to tailor the display. Results can be updated through this tab and you can work with the raw data as well.

If you prefer to analyze your data outside of the application, you can **export the results** into a CSV (Comma Separated Values) file which can then be saved as an Excel spreadsheet. Data can also be exported to a file compatible for analysis in SPSS.

Note!
SPSS (Statistical Package for the Social Sciences) is a statistical and data management software package for analysts and researchers.

Create Basic Report



You can **generate a report** based on your survey results. The report option allows you to choose the questions to be included, and to set up specific parameters for what other information you want included in the report such as text responses provided by your users, executive summary text or user analysis comments that you enter.

The information that is contained in the report is determined by selections you make on the **Report Tab** in conjunction with selections that are made on the **Analyze Tab**.

Reports can be generated in a standard basic report format as well as a **cluster report** or **public report**, and can be run as many times as necessary. A report can also be exported to a MS Word file, an Adobe PDF file, or a MS PowerPoint file.

Chapter Four

How to Add Questions to Your Survey

Discussed in this Chapter

- Question Library
- New Question

How to Add Questions to Your Survey

Question Library

Using the **Question Library** to add questions to your survey can be very efficient, and reduce the time and effort needed to create your survey. Once the questions have been inserted into your survey, they can be edited as desired.

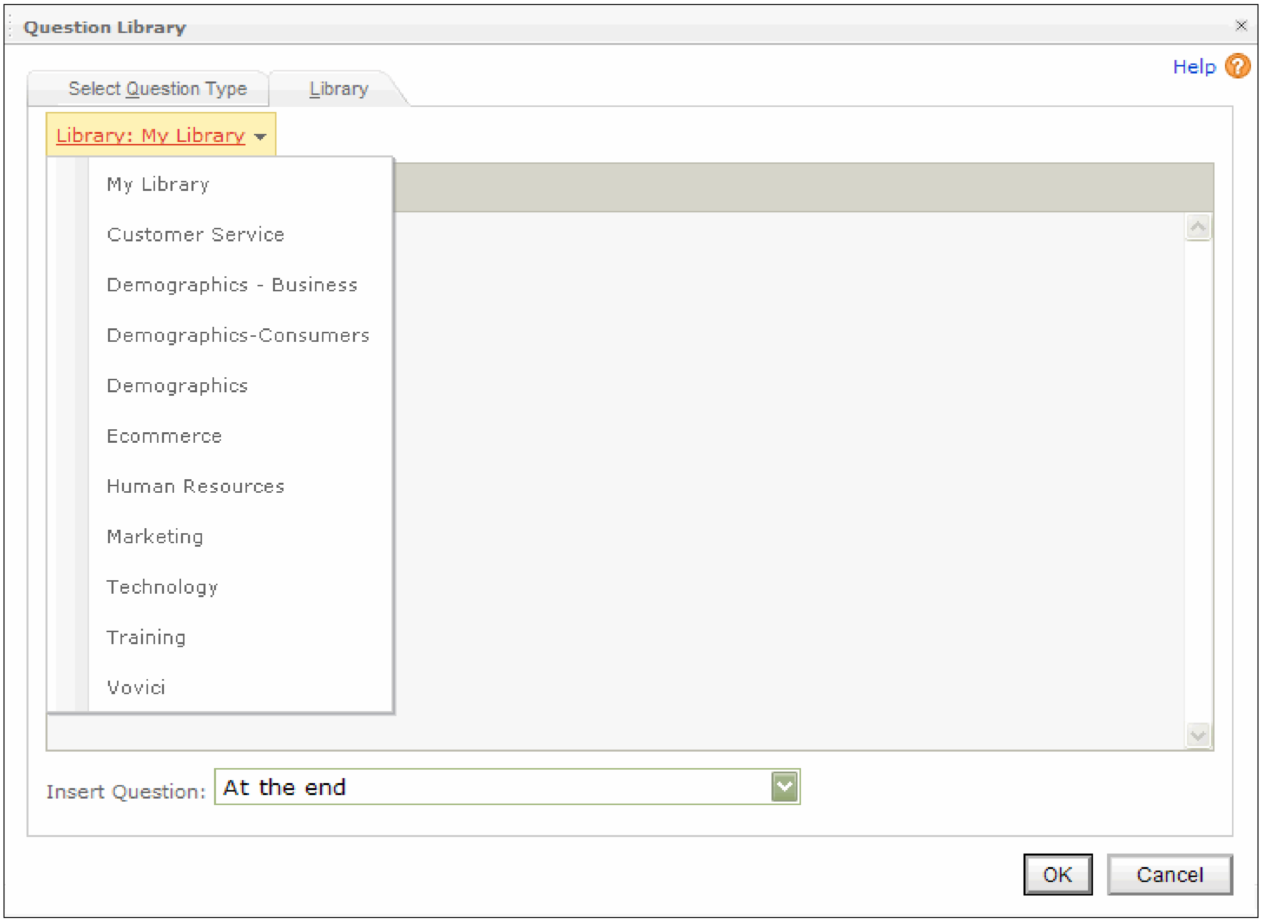
The **Library** drop-down menu contains various categories of predefined questions to choose from. Simply select the desired category from the menu to view the questions and make your selections.

Adding a Question from The Question Library

1. Click the **New Question** button in the Editing Tool Bar.
2. Click the **Library** tab to begin the process.
3. Select the appropriate question category from the **Library** drop-down menu, or from **My Library** (your personal libraries).
4. Click the check box next to the question(s) you want to add to your survey.
5. Use the **Insert Question** drop-down list to position the question(s) in your survey.
6. Click **OK**.

Note!
You can add multiple questions at the same time by selecting the check boxes next to all your desired selections. Then, use the Insert Question drop-down list to position the question(s) in your survey, click OK.

Tip!
You can select <u>all</u> of the questions from the current library by selecting the check box at the top left corner of the dialog. Clicking the check box again will remove the selections.



Adding a Question from the Question Library

Adding Existing Questions to Your Library

To add a particular question to your personal library:

1. Select the check box next to the question you want to add.
2. Click the **Add To Library** icon in the Editing Tool Bar.
3. Click **OK**.

Adding a Question to your Personal Library

This action adds the selected question(s) to your personal library. The question(s) can now be selected from your personal library for use in other surveys you create.

.

New Question

To begin building your survey, your first step will be to **add questions**. If you are creating a new survey, you are automatically placed in the **Edit Survey** option once you create your survey. If you are adding questions to a survey that already exists, you will click your survey title and select the **Edit Survey** option.

There are two ways to begin adding questions to your survey. When you click **New Question** you can choose a question style from the **Select Question Type** tab shown and build it yourself, or you can choose a question from a predefined Question Library under the **Library** tab.

Adding a Question from Select Question Type

1. Click the **New Question** button.
2. Select a question type to create from the **Question Type** box on the left. When a question type is highlighted, a sample version of that question type will display in the **Sample** dialog box on the right. This will serve as a visual guide to show how the question will be displayed in your survey.
3. Use the **Insert Question** drop-down list to position the question in your survey. Questions can be placed at the beginning, after a particular question already in your survey (all of your current questions display), or at the end.
4. Click **OK**.
5. You are now placed in the **Question Edit** dialog, where you will enter question text and/or response options for your questions.

See related topics in the online Help system: **Managing the Question List**, **Standard Question Types.**

Chapter Five

Survey Question Types

Discussed in this Chapter

- Standard Question Types
- Choose One (Show All)
- Choose One (Horizontal Layout)
- Choose One (Pull Down Menu)
- Choose All That Apply
- Fill In the Blank (Limited Text)
- Essay (Unlimited Text)
- Numeric Value
- Date Value
- Choose One Matrix
- Choose All That Apply Matrix
- Side-By-Side Matrix
- Data Block
- Rank Order
- HTML Snippet
- Hidden Field
- Page Break / Conditional Logic

Survey Question Types

Standard Question Types

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

There are various question types that can be utilized in your survey, as well as different attributes that can be set for those questions. You can get more information on each of the different question types by visiting the sections below:

Choose One (Show All)
Choose One (Horizontal Layout)
Choose One (Pull Down Menu)
Choose All That Apply
Fill In The Blank (Limited Text)
Essay (Unlimited Text)
Numeric Value
Date Value
Choose One Matrix
Choose All That Apply Matrix
Side-By-Side Matrix
Data Block
Rank Order
HTML Snippet
Hidden Field
Page Break/Conditional Logic

Internal IDs

Each question and response option in your survey has a unique **wsb number** (Internal ID number). This value appears to the right of the question and will show as '**wsbXX'** where '**XX**' is a number assigned by the application. These ID numbers are used to uniquely identify and help map data to the proper question/response in your survey.

Choose One

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

A **Choose One** question allows the respondent to choose only one response from the available response options for that question. The responses can be displayed in three different ways:

- vertical
- horizontal
- drop-down menu

Sample Choose One Question (vertical)

To Create a Choose One Question

1. Click the **New Question** button.
2. Select **Choose One** as the Question Type. You can choose any of the three response layout styles from the Question Type list. The response layout can be changed if necessary on the **Advanced Tab**.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Response Type

The **Response Type** drop-down menu allows you to change the response type. It is located directly above the **Editing Tool Bar**.

The response type drop-down menu options are:

- Single Select
- Multiple Select

Note!
Once the survey has been published, the option to change the response types is no longer available.

If the question is added to a survey that has been previously published, the option to change the response types is not available.

Add the response items in the text box at the bottom. You can add the response items one at a time, or use the **Add Multiple Responses** feature to add them all at the same time.

Advanced Tab

The options on this tab are:

Disable: Select the check box to disable the question in the survey without deleting it.
Required: Select the check box to require the user to answer the question.
Randomize: Select the check box to have the response options appear in a random order each time the survey is accessed.
Include a 'Comments' Field: Select the check box to include a 'Comments' field with this question.
Response Layout: You can select a horizontal, vertical or pull-down display for your response options.

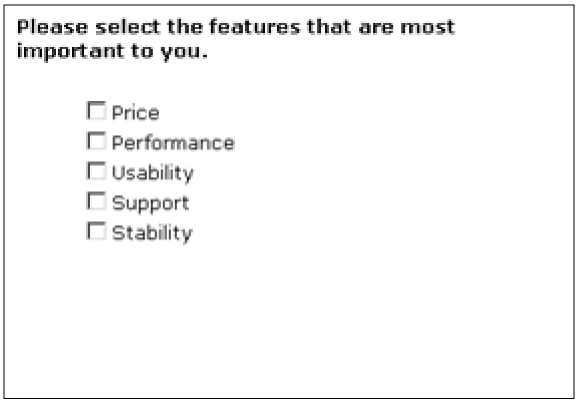
Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Choose All That Apply

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

A **Choose All That Apply** question allows the respondent to choose multiple responses from the available response options for that question.



Sample Choose All That Apply Question

To Create a Choose All That Apply Question

1. Click the **New Question** button.
2. Select **Choose All That Apply** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Response Type
The **Response Type** drop-down menu allows you to change the response type. It is located directly above the **Editing Tool Bar**.

The response type drop-down menu options are:

- Single Select
- Multiple Select

Note!
Once the survey has been published, the option to change the response types is no longer available.

If the question is added to a survey that has been previously published, the option to change the response types is not available.

Add the response items in the text box at the bottom. You can add the response items one at a time, or use the **Add Multiple Responses** feature to add them all at the same time.

Advanced Tab

The options on this tab are:

Disable: Select the check box to disable the question in the survey without deleting it.
Required: Select the check box to require the user to answer the question. Use the drop-down lists to further specify the conditions of the response.
Randomize: Select the check box to have the response options appear in a random order each time the survey is accessed.
Include a 'Comments' Field: Select the check box to include a 'Comments' field with this question.
Response Layout: You can select a horizontal or vertical display for your response options. For a vertical layout, you can use the drop-down list to specify how many columns to use for the display.

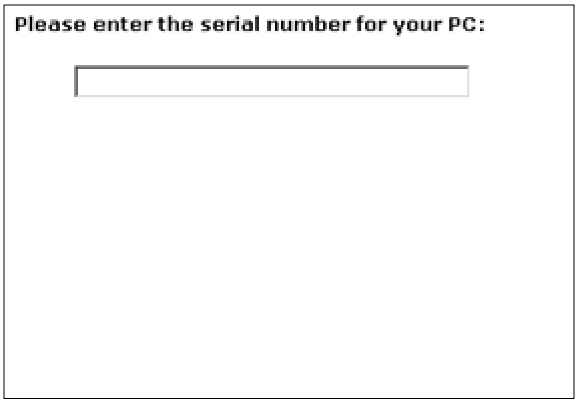
Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Fill in the Blank (Limited Text)

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Fill In The Blank (Limited Text)** question provides a text box for respondents to fill in requested information.



Sample Open Ended Text Limited Question

To Create a Fill In The Blank (Limited Text) Question

1. Click the **New Question** button.
2. Select **Fill In The Blank (Limited Text)** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Select **Fill In The Blank (Limited Text)** to define the question as limited. Enter a value in the **Limit text to** box to define the **length** of the acceptable answer (1-250 alphanumeric characters). The default is usually 40 characters and is set under My Preferences.

A **text mask** can be defined to ensure that all answers are in the same format. The mask is stringent and will determine the type of characters that are acceptable as well as the length of the answer.

Example:
If you set a mask of 99999, this mask will require an entry of all numbers, and will require five (5) digits as shown. If the entry is less than five (5) digits, a validation script will show as follows:

Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

Advanced Tab

Disable Question
Select the check box to disable the question in the survey without deleting it.

Required Question
Select the check box to require the user to answer the question.

Preview Tab

Click the Preview tab to see how the question will appear in your survey.

See related topic: Essay (Unlimited Text)

Essay (Unlimited Text)

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Essay (Unlimited Text)** question provides a text box for respondents to fill in requested information.

Sample Open Ended Text Unlimited Question

To Create an Essay (Unlimited Text) Question

1. Click the **New Question** button.
2. Select **Essay (Unlimited Text)** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Select **Essay (Unlimited Text)** to define the question as unlimited. Do not enter a value in the **Limit text to** box.

A **text mask** can be defined to ensure that all answers are in the same format. The mask is stringent and will determine the type of characters that are acceptable as well as the length of the answer.

Example:
If you set a mask of 99999, this mask will require an entry of all numbers, and will require five (5) digits as shown. If the entry is less than five (5) digits, a validation script will show as follows:

Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

Advanced Tab

Disable Question
Select the check box to disable the question in the survey without deleting it.

Required Question
Select the check box to require the user to answer the question.

Preview Tab

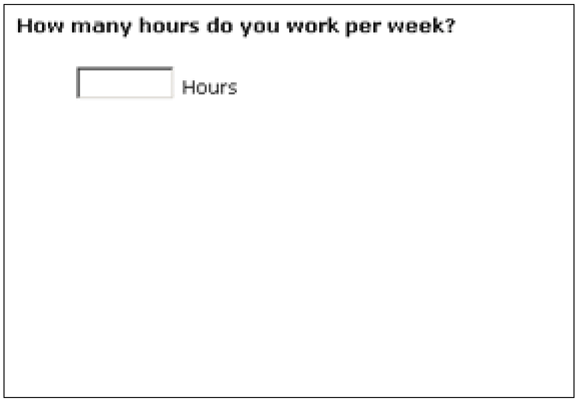
Click the Preview tab to see how the question will appear in your survey.

See related topic: Fill In the Blank (Limited Text)

Numeric Value

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

A **Numeric Value** question requires the respondent to enter a response in numeric format within a specified range.



Sample Numeric Value Question

To Create a Numeric Value Question

1. Click the **New Question** button.
2. Select **Numeric Value** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

When the question is defined, **minimum** and **maximum** values are required to create the range of acceptable values for this question.

Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Numeric Question - Basic Tab Options

Alert!
The numeric range setting is not displayed in the survey unless it is entered as part of the question, or as Pre-Field or Post-Field text.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

Advanced Tab

Disable Question

Select the check box to disable the question in the survey without deleting it.

Required Question

Select the check box to require the user to answer the question.

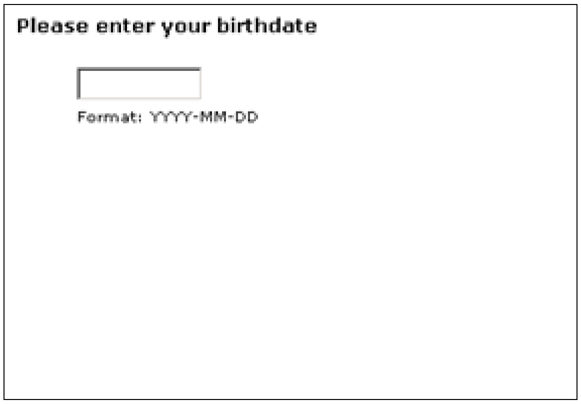
Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Date Value

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Date Value** question type requires the respondent to enter a specific date. Respondents will be asked to enter the date in YYYY-MM-DD format which conforms with **ISO 8601:1988 format standard**.



Sample Date Value Question

To create a Date Value question

1. Click the **New Question** button.
2. Select **Date Value** as the question type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Specify the acceptable type of date for the question from the **Date Range** drop-down list:

- Accept any date
- Date is on or before
- Date is on or after

Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Alert!
The Date Range setting is not displayed in the survey unless it is entered as part of the question, or as Pre-Field or Post-Field text.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

Advanced Tab

Disable Question

Select the check box to disable the question in the survey without deleting it.

Required Question

Select the check box to require the user to answer the question.

Note!
You can also require the question by selecting the check box for that question in the Question List Pane then clicking the "Required" button.

Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Choose One Matrix

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Choose One Matrix** question presents a compact way to ask the respondent for feedback on a range of **categories**. Each **row** of the matrix question contains a **category** to be evaluated, and each **column** of the matrix question contains a **response option** used for evaluating the categories.

In a **Choose One Matrix** question, only one response option per category can be selected.

In the **Question Edit** dialog, the **Choose Only One Matrix** will have tabs for **Basic**, **Advanced** and **Preview**.

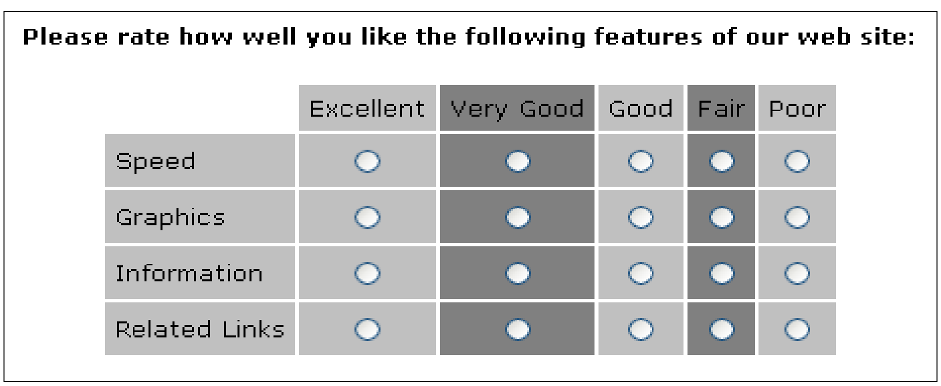
Example

In the **Choose One Matrix** question below, the **categories** are:

Speed
Graphics
Information
Related Links

The **response options** are:

Excellent
Very Good
Good
Fair
Poor



Choose One Matrix Question

Tip!
It is recommended that question text, categories and response options be kept as short as possible as the length of these fields will affect the display of the graphs in Analysis and column headers when you Export Data. Question/response text will not wrap on the graphs or legend. Matrix categories and response options have the option to define Analysis or Export Versions as desired.

Tip!
If your matrix question text is lengthy, try putting the text into an HTML snippet question. Then, set up a matrix question without question text, and define the categories and response options as normal.

To Create a Select Only One Matrix Question

1. Click the **New Question** button.
2. Select **Choose One Matrix** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Under the **Basic Tab**, enter the question text in the text box.
5. **Categories** are listed in the left section below the question text box. Type your categories in the text box at the bottom one at a time, clicking the **Add** button after each one. You can also use the **Add Multiple Categories...** button to add all your categories at once.
6. **Responses** are listed in the right section below the question text box. Type your categories in the text box one at a time, clicking the **Add** button after each one. You can also add responses from a **Response Library** or use the **Add Multiple Responses** feature to add all your responses at once.
7. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Response Type

The **Response Type** drop-down menu allows you to change the response type. It is located directly above the **Editing Tool Bar**.

The response type drop-down menu options are:

- Single Select
- Multiple Select

Note!
Once the survey has been published, the option to change the response types is no longer available.

If the question is added to a survey that has been previously published, the option to change the response types is not available.

Include a 'Comments' Field: Select the check box to include a 'Comments' field with this question.

Add the categories in the text box at the bottom left.

Add the responses in the text box at the bottom right. You can add the response items one at a time, or use the **Add Multiple Responses** feature to add them all at the same time.

Advanced Tab

The options on this tab are:

Disable: Select the check box to disable the question in the survey without deleting it.
Suppress Question Numbers: Select the check box to suppress question numbers on the categories.
Randomize: Select the check box to have the categories appear in a random order each time the survey is accessed.
Set Fixed Column Width: You can set the width of categories or rows so that they display uniformly.
Response Layout: You can select a horizontal or vertical display for your response options.
Colors: You can set the colors for your question display by clicking the color palette icon and selecting a color. Colors can be applied to rows or columns. If you know the HTML hexadecimal value for the color you want, you can type it in.

Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Choose All That Apply Matrix

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Choose All That Apply Matrix** question presents a compact way to ask the respondent for feedback on a range of **categories**. Each **row** of the matrix question contains a **category** to be evaluated, and each **column** of the matrix question contains a **response option** used for evaluating the categories.

In a **Choose All That Apply Matrix** question, multiple response options for each category can be selected.

In the **Question Edit** dialog, the **Choose All That Apply Matrix** will have tabs for **Basic**, **Advanced** and **Preview**.

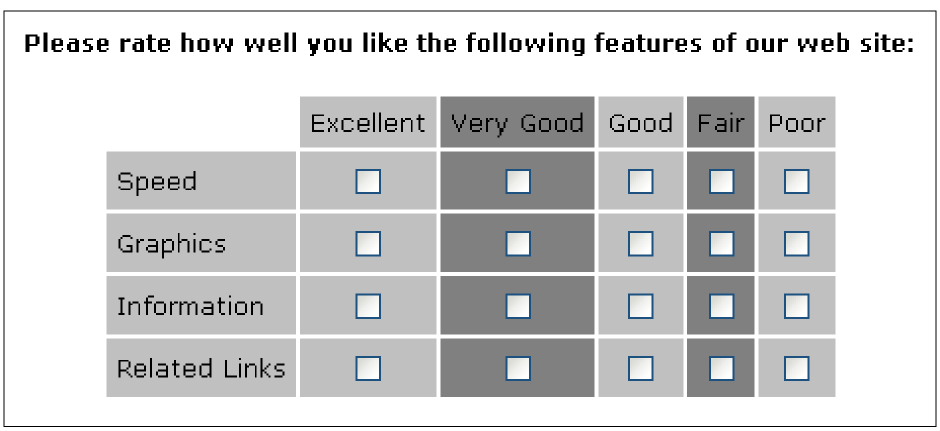
Example

In the **Choose All That Apply Matrix** question below, the **categories** are:

Speed
Graphics
Information
Related Links

The **response options** are:

Excellent
Very Good
Good
Fair
Poor



Choose All That Apply Matrix Question

Tip!
It is recommended that question text, categories and response options be kept as short as possible as the length of these fields will affect the display of the graphs in Analysis and column headers when you Export Data. Question/response text will not wrap on the graphs or legend. Matrix categories and response options have the option to define Analysis or Export Versions as desired.

Tip!
If your matrix question text is lengthy, try putting the text into an HTML snippet question. Then, set up a matrix question without question text immediately after the snippet and define the categories and response options as normal.

To Create a Choose All That Apply Matrix Question

1. Click the **New Question** button.
2. Select **Choose All That Apply Matrix** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Under the **Basic Tab**, enter the question text in the text box.
5. **Categories** are listed in the left section below the question text box. Type your categories in the text box at the bottom one at a time, clicking the **Add** button after each one. You can also use the **Add Multiple Categories...** button to add all your categories at once.
6. **Responses** are listed in the right section below the question text box. Type your categories in the text box one at a time, clicking the **Add** button after each one. You can also add responses from a **Response Library** or use the **Add Multiple Responses** feature to add all your responses at once.
7. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Response Type

The **Response Type** drop-down menu allows you to change the response type. It is located directly above the **Editing Tool Bar**.

The response type drop-down menu options are:

- Single Select
- Multiple Select

Note!
Once the survey has been published, the option to change the response types is no longer available.

If the question is added to a survey that has been previously published, the option to change the response types is not available.

Include a 'Comments' Field: Select the check box to include a 'Comments' field with this question.

Add the categories in the text box at the bottom left.

Add the responses in the text box at the bottom right. You can add the response items one at a time, or use the **Add Multiple Responses** feature to add them all at the same time.

Advanced Tab

The options on this tab are:

Disable: Select the check box to disable the question in the survey without deleting it.
Suppress Question Numbers: Select the check box to suppress question numbers on the categories.
Randomize: Select the check box to have the categories appear in a random order each time the survey is accessed.
Set Fixed Column Width: You can set the width of categories or rows so that they display uniformly.
Colors: You can set the colors for your question display by clicking the color palette icon and selecting a color. Colors can be applied to rows or columns. If you know the HTML hexadecimal value for the color you want, you can type it in.
Required: Select the check boxes for any categories that you want to require the respondent to answer.

Preview Tab

Click the Preview tab to see how the question will appear in your survey.

Side-By-Side Matrix

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Side-By-Side Matrix** question presents a compact way to ask the respondent for feedback on a range of **categories**. Each **row** of the matrix question contains a **category** to be evaluated, and each **column** of the matrix question contains a **response option** used for evaluating the categories.

An added feature is that response types can be mixed in a side-by-side matrix, e.g., one '**side**' can be defined as **choose one** while another 'side' is defined as **choose all that apply**. Sides that are defined as **choose one** can use either a **horizontal** layout or a **drop-down list** for the **response options**.

Categories are only added once for the entire question and will display on the left next to the first '**side**'. Additional '**sides**' will be displayed adjacent to each other with the **response options** for that **side** along the top as column headers. The title of the **side** spans the top of the columns above the **response options**.

Note!
The example below utilizes Choose All That Apply for Side One, Choose One horizontal for Side Two, and Choose One drop-down list for Side Three.

Side-By-Side Matrix Question

How to Create A Side-By-Side Matrix Question

1. Click the **New Question** button.
2. Choose **Side-By-Side Matrix** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Enter overall question text in text box.

5. **Categories** are created in the lower left section. Enter your categories one at a time in the bottom left text box. Click **Add**. You can also use the **Add Multiple Categories...** button to add all your categories at once.
6. **Sides** are created in the lower right section. To add a **Side**, choose the response type from the drop-down list at the bottom right (**choose one** or **choose all that apply**). Click **Add Side**.
7. On the **Sides Tab**, enter the text to be used for the title heading in the text box at top.
8. Enter **response options** in the box at bottom, click **Add**. As with other question types, you can also add responses using the **Response Library** option, or **Add Multiple Responses**. You can change the **Response Type** by using the Response Type drop-down list at the top of the **Sides Tab**.
9. Click **OK**.

Sides Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Response Type

The **Response Type** drop-down menu allows you to change the response type. It is located directly above the **Editing Tool Bar**.

The response type drop-down menu options are:

- Single Select
- Multiple Select

Note!
Once the survey has been published, the option to change the response types is no longer available.

If the question is added to a survey that has been previously published, the option to change the response types is not available.

Add the response items in the text box at the bottom. You can add the response items one at a time, or add them using the **Add Multiple Responses** or **Response Library** options.

Advanced Tab

This tab contains settings to be applied to the specific **side** you are editing.

Include a 'Comments' Field

You can include a Comments field which will be added to the bottom of the selected **side**.

Colors

You can use the color palette icon to select colors to be applied to the selected **side**. You can also enter the HTML hexadecimal value for the color you want in the text box. Colors can be applied to alternating rows or columns.

Question Numbers

Select the check box to suppress question numbers on the categories.

Response Layout

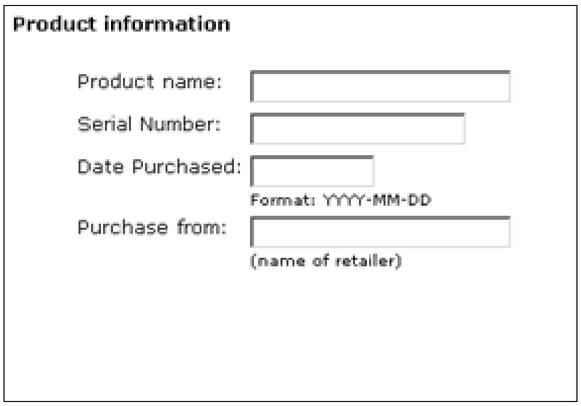
This option is present only on **single select** sides. You can select **horizontal** or **pull down** to display the response options.

Data Block Question

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

Data block questions are used to present a data entry area for respondents to fill in requested information.

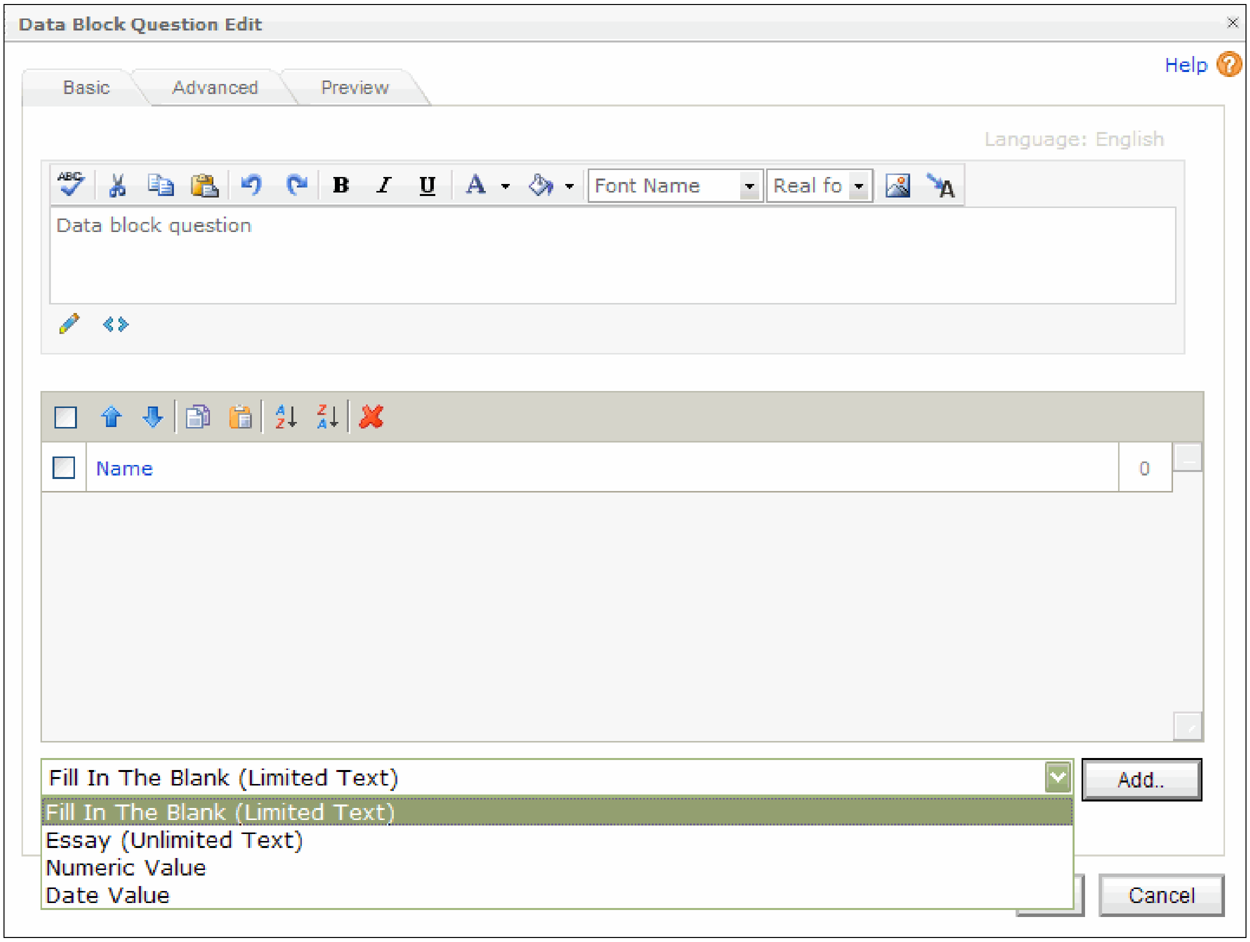
A **data block** question consists of the question text and the response fields which are labeled text box fields where the information is entered. The **data block** is presented in a tabular format in your survey rather than as individual questions.



Sample Data Block Question

The response fields in a data block question can be defined as:

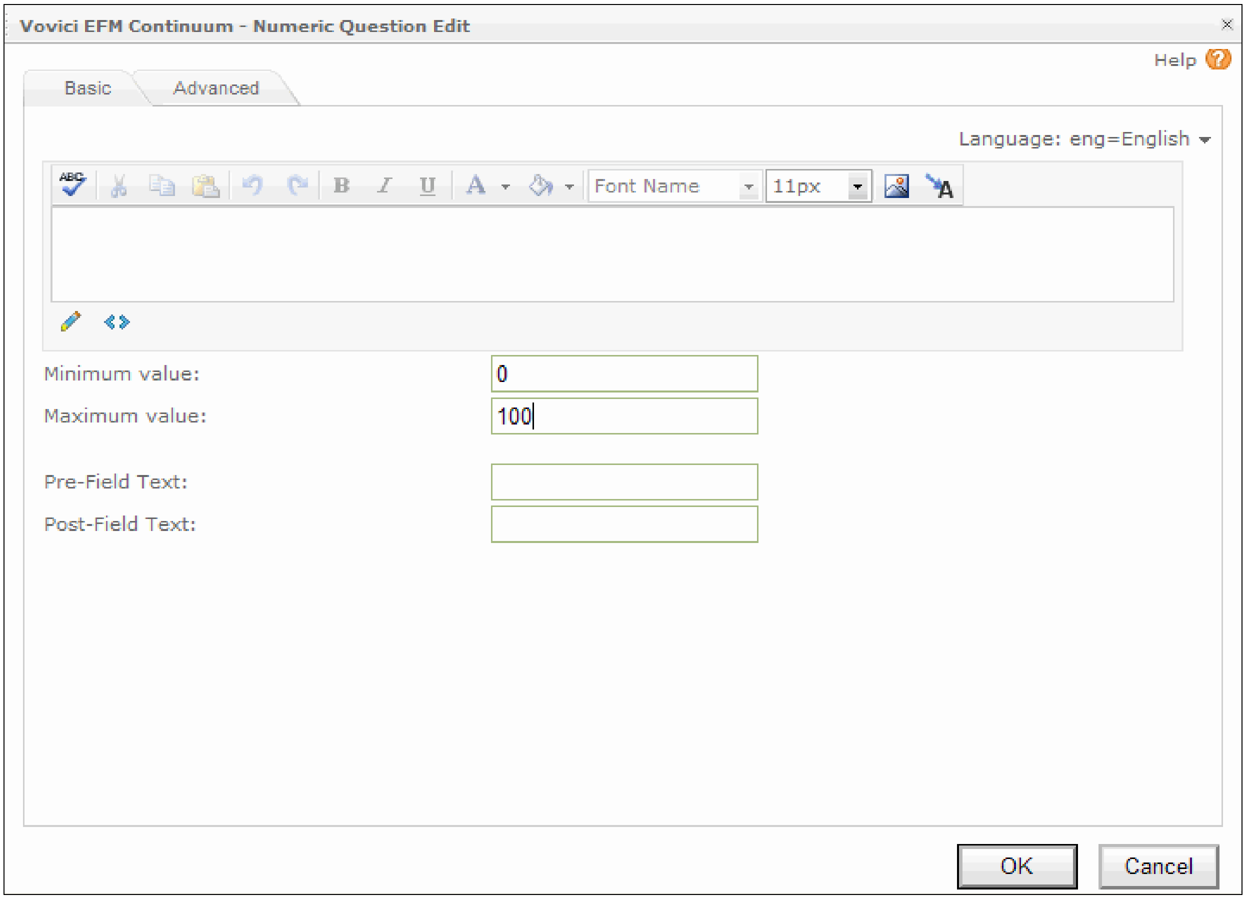
- **Fill In The Blank (Limited Text)** (up to a maximum of 250 characters)
- **Essay (Unlimited Text)**
- **Numeric Value**
- **Date Value**



Data Block Question Edit

Note!
By default Numeric Value defined response fields will require you to enter a range using minimum and maximum values. Any number entered in the response field by a respondent must be within the defined range. If it is not, a script validation alert will show when you click Next Page or Submit.

Numeric Range Validation Alert



Numeric Value and Pre-Field / Post Field Text

Create a Data Block Question

A typical data block question contains the title text and several response fields where information is entered by the respondent.

Steps

1. Click the **New Question** button, select **Data Block** as the Question Type.
2. Use the **Insert Question** drop-down list to position the question in your survey.
3. Enter the question text on the **Basic Tab** of the **Data Block Question Edit** dialog.
4. Select the type of **Response Field** to add from the drop-down list at the bottom of the dialog.
5. Click **Add**.
6. The **Question Edit** dialog will display. Enter the name of the **response field**. Define any appropriate parameters as shown such as a character limit, text mask, pre-field text or post-field text.
7. Click **OK**.

Text mask is a user-defined format that requires responses for that field to be in the designated format.
Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

Advanced Tab of Response Field

Disable option turns off this question in the survey.

- You can disable the question from the **Question List Tool Bar** by selecting the question then clicking the **Disabled** button.
- You can also disable the question by selecting the check box under the **Advanced Tab** of the **Data Block Question Edit** dialog.

Required means user (recipient of your survey) must answer this response item.

- You can require the question from the **Question List Tool Bar** by selecting the question then clicking the **Required** button.
- You can require specific response fields by selecting the check box for '**Require this question to be answered in the survey'** on the **Question Edit** dialog.

Data Block Sum-To

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

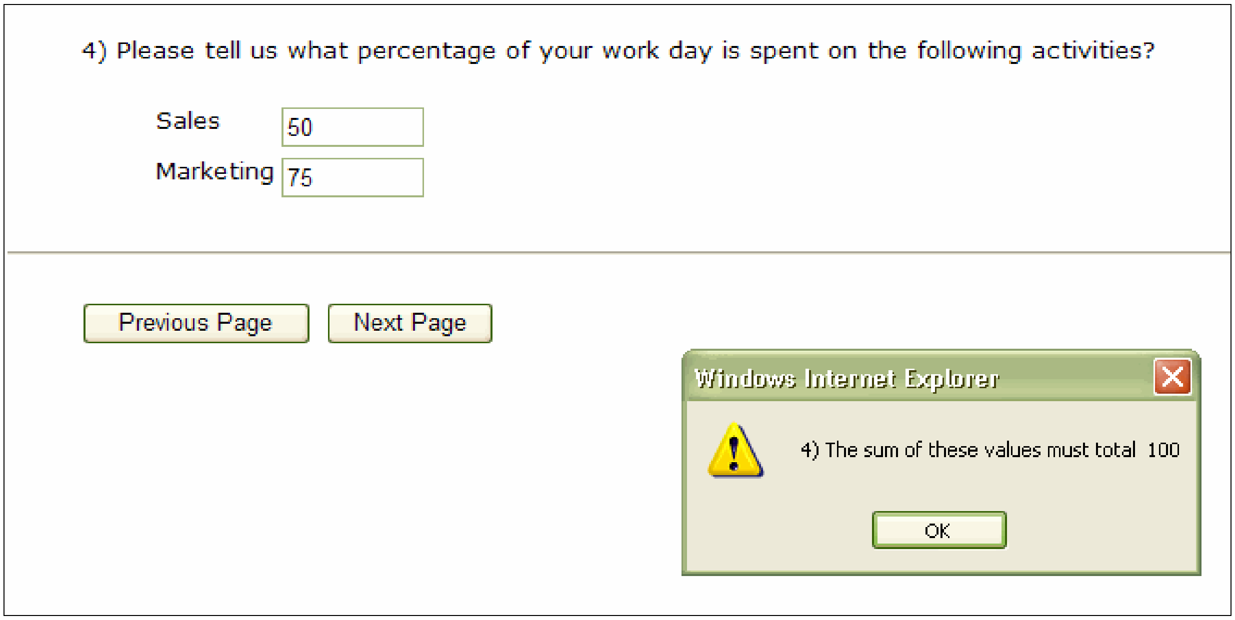
Create a Sum-To Data Block Question

You can set up a **sum-to data block** where a set of **numeric** entries is required to add up to a certain total. This is typically used in a percentage scenario where the respondent's entries have to total to a certain number, usually 100%.

Steps

1. Click the **New Question** button, select **Data Block** as the Question Type.
2. Use the **Insert Question** drop-down list to position the question in your survey.
3. Select **Numeric** as the item type to be added, click **Add**.
4. When all numeric response fields have been created, go to **Advanced Tab**.
5. Select the checkbox for **Enable "sum to,"** with another box beneath it that reads **'Sum of all responses must equal'** where you will specify the required total.
6. Click **OK**.

Note!
Validation on a sum-to data block question requires the user to enter values and requires that they add up correctly. If they do not, a script validation alert as shown below will display when you click Next Page or Submit.



Example of a Sum-To Data Block Question with Validation Alert

Text mask is a user-defined format that requires responses for that field to be in the designated format.
Pre-Field Text is user-defined text that will display before the text box in the item.
Post-Field Text is user-defined text that will display after the text box in the item.

Tip!
When specifying Pre-Field or Post-Field text, use * * (nonbreaking space) before or after your text to separate it from the text box.

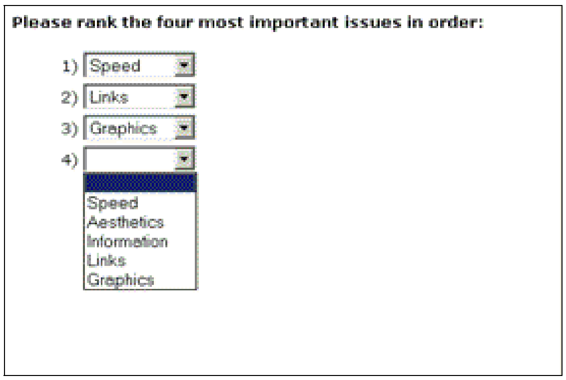
Disable option turns off this question in the survey.

- You can disable the question from the **Question List Tool Bar** by selecting the question then clicking the **Disabled** button.

Rank Order

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **Rank Order** question is used to display a series of items you would like the respondent to rank in a particular order. The **Rank Order** question renders in a survey as a series of drop-down lists, one for each of the ranks you would like the user to choose. Each drop-down list contains all of the response options and the ranks will be selected from the entire list.



Sample Rank Order Question

Tip!
The most effective ranking questions contain 3-5 items to rank. Ten (10) items is the maximum you should ask a user to rank. While you can have a large number of response options to choose from, the number of ranks available should be relatively low.

Note!
Validation script for the Rank Order question requires that options that are ranked be unique. If the user has selected an option for more than one rank, the last item that is redundantly selected will not be applied and a warning dialog will be presented (below) prompting the user to choose another selection.

Rank Order Validation Alert

To Create a Rank Order Question

1. Click the **New Question** button.
2. Select **Rank Order** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The question text is entered in the text box and can be formatted using the **Editing Tool Bar**.

Add the response items to be ranked in the text box at the bottom. You can add the response items one at a time, or use the **Add Multiple Responses** feature to add them all at the same time.

Advanced Tab

The options on this tab are:

Disable: Select the check box to disable the question in the survey without deleting it.
Required: Select the check box to require the user to answer the question.
Randomize: Select the check box to have the response options appear in a random order each time the survey is accessed.
Number of Ranks Available: Select the number of ranks you want from the drop-down list. The total number of ranks possible corresponds to the total number of response options.

Preview Tab

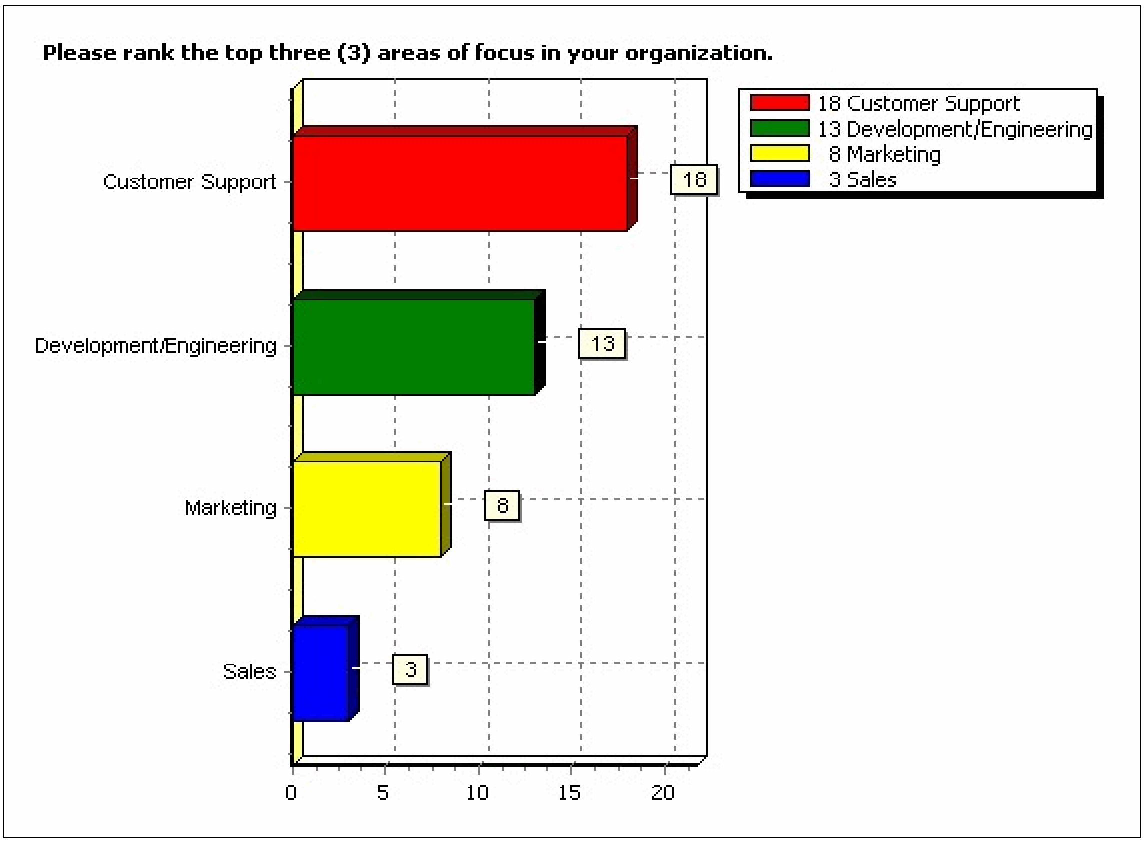
Click the Preview tab to see how the question will appear in your survey.

Analysis for Rank Order Question

When analyzing a **Rank Order** question, each of the ranks selected is assigned a point value. This point value is based on the **number of ranks** and the order in which an item is selected.

In the example below, the question uses six (6) response options while the number of ranks is set to three (3). The maximum number of points for a number one rank selection is the number of ranks that are available. Therefore, selecting an item **first** results in **3 points** being applied to that item, selecting an item **second** results in **2 points** applied to that item, and the **third** item selected would be assigned **1 point**. If there are more selections than there are ranks, then the items not selected will be assigned 0 points.

The best chart type for rank order analysis is the **horizontal bar** chart. Since percentages have no real impact on the results, simple **value** counts should be used to determine the ranking order. See Chart Properties for more information.
The display legend shows the total number of points that each selection received.



The **response options** to be ranked were:

Marketing
Sales
Development/Engineering
Customer Support
MIS/Information Technology
Finance

There were a total of seven (7) responses submitted to the survey. Since this question asked people to rank the top three (3) items out of six (6) possible selections, the points will be awarded in this manner:

Rank #1 = 3 points
Rank #2 = 2 points
Rank #3 = 1 point

After exporting the data for this question to MS Excel (*see CSV representation in the table below*), you can see that four (4) of the seven (7) people who completed the survey ranked "Customer Support" **first**, and three (3) of the seven (7) people ranked "Customer Support" **second**. So, 12 points come from the four (4) people who ranked "Customer Support" **first** (4 * 3 = 12 points), and 6 points come from the three (3) people who ranked "Customer Support" **second** (3 * 2 = 6 points).

12 + 6 = 18

Rank 1 - (3 points)	Rank 2 - (2 points)	Rank 3 - (1 point)
Customer Support	Marketing	Development/Engineering
Customer Support	Marketing	Development/Engineering
Customer Support	Marketing	Development/Engineering
Customer Support	Marketing	Development/Engineering
Development/Engineering	Customer Support	Sales
Development/Engineering	Customer Support	Sales
Development/Engineering	Customer Support	Sales

Customer Support received a total of 18 points and that point value is displayed in the legend of the bar chart.

HTML Snippet

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

The **HTML Snippet** question type can be used to insert HTML-formatted text between questions in your survey. It is a good way to place section headings into a survey and format them so they stand out, or to add explanatory text before a question or section.

To add an HTML Snippet:

1. Click the **New Question** button.
2. Select **HTML Snippet** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.

Basic Tab

The **Basic** tab is where you add the text to be displayed. You can use the **Editing Tool Bar** above the question text box to insert the desired formatting, or you can code the HTML yourself.

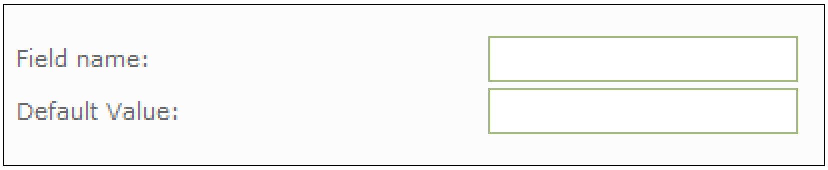
Advanced Tab

Disable - Select the check box to disable the question in the survey without deleting it.

Hidden Field

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

You can incorporate data into your survey or results without requiring the user to enter any values by using a **hidden field**. The hidden field is a variable in your survey that will be populated with a specific value. You must first add the **hidden field question** to your survey, then it is populated when the user takes the survey.



Sample Hidden Field Question Edit

To Add A Hidden Field to Your Survey

1. Click the **New Question** button.
2. Select **Hidden Field** as the question type.
3. Use the **Insert Question** drop-down list to position the hidden field question **at the beginning** of your survey.
4. Click **OK**.
5. Enter a **Field Name** for the hidden field. A **Default Value** can be entered also but is not required.
6. Click **OK**.

Note!
Default Value is displayed when there is no corresponding value for the hidden field in your mailing list for a particular respondent. If no default value is defined, the hidden field will be blank in the survey results for that entry.

Tip!
Hidden fields should always be placed at the top of your question list so they are easy to locate for analysis and to reference for troubleshooting. Doing so will also place them up front in your actual data immediately following the normal system fields.

Passing Data

There are two methods for passing data into your survey through a **hidden field**.

Method One

The most common method is to use a **Mailing List** to send out your survey invitations where the list contains all the data values to be passed. The **hidden field** will be represented in your survey results with its own column the same as any other question. When a value is passed from a list to populate the hidden field it will display in your survey results without the user having to enter it. The **field mapping** step used when sending out a campaign is what synchronizes the hidden field in the survey with the data in the list.

Example:
If you have a column in your Mailing List for ***Department*** and you want to see those values in your actual results, you can add a **hidden field** to your survey named ***Department***. This will create a column in your Actual Data called ***Department***. When the user takes the survey, their value for ***Department*** will be pulled from the mailing list and populated in this column in the **survey results**.

Method Two

You can use a hidden field to pass data manually by appending the hidden field values onto the end of your survey URL using the **wsb number**. The value will show in the hidden field column in your survey results. If you don't use the **Mailing List** option, you have to pass values manually, which means that each user will have their own URL (base survey URL plus their appended values).

Note!
WSB numbers are unique internal id numbers assigned by the application to each question and/or response option. They are displayed in the Question List to the right of each question, and are always visible unless you select the option to hide them under My Preferences.

Example:
Begin with the base survey URL that the application produces when you publish your survey.

Assume that your survey contains a hidden field named ***Department*** and that it has a **wsb number of 1** (**wsb1**). The hidden field will show in the **survey results** as a column named ***Department***.

A delimiter (**?**) must be used to indicate to the server that additional parameters are being passed in. Our syntax requires that the **wsb number** of the hidden field be used instead of the field name to pass the value.

You have to append the **hidden field wsb number and its value** onto the end of the survey URL as follows:

http://*surveyURL***?wsb1=Sales**

The example above would populate the hidden field *Department* with a value of *Sales*.

Alert!
It is important that the <u>exact wsb number</u> of the hidden field(s) in your survey be used in the URL syntax. Your wsb values may differ from those used in the example.

If you have more than one hidden field in your survey, you can append multiple values to the base URL by using another delimiter (**&**) between the wsb values.

Example:
If you have two hidden fields, ***Department (wsb1)*** and ***CodeNumber (wsb2)***, your appended URL would look like this:

http://*surveyURL*?**wsb1=Sales&wsb2=3333**

Once these values have been captured, they can be used the same as other responses when analyzing your data.

Page Break / Conditional Logic

From the **Feedback** tab, select a survey from the **List Pane**. Next click **Edit Survey** from the **Options Pane** and the **Edit** tab is displayed. Click the **New Question** button and then choose the **Select Question Type** tab.

You can insert **page breaks** into your survey to help keep it more manageable and decrease scrolling for your respondents.

The page break is implemented by **adding a new question** in your survey and selecting **Page Break / Conditional Logic** as the question type. A page break can be implemented as a **simple page break** or a **conditional page break**.

The page break will be viewed in the Question List as a regular question and can be edited the same as any other question. In the survey, the page break will be represented by the **Next Page** button.

To Create a Simple Page Break

This type of page break is added to create sections in the survey.

1. Click the **New Question** button.
2. Select **Page Break / Conditional Logic** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.
5. Select **Simple** as the type of page break to be created from the **Page Break Type** drop-down list.
6. Select the action that will be associated with the page break (see explanations below).
7. Click **OK**.

Perform The Following Action
There are four actions associated with the **simple page break**:

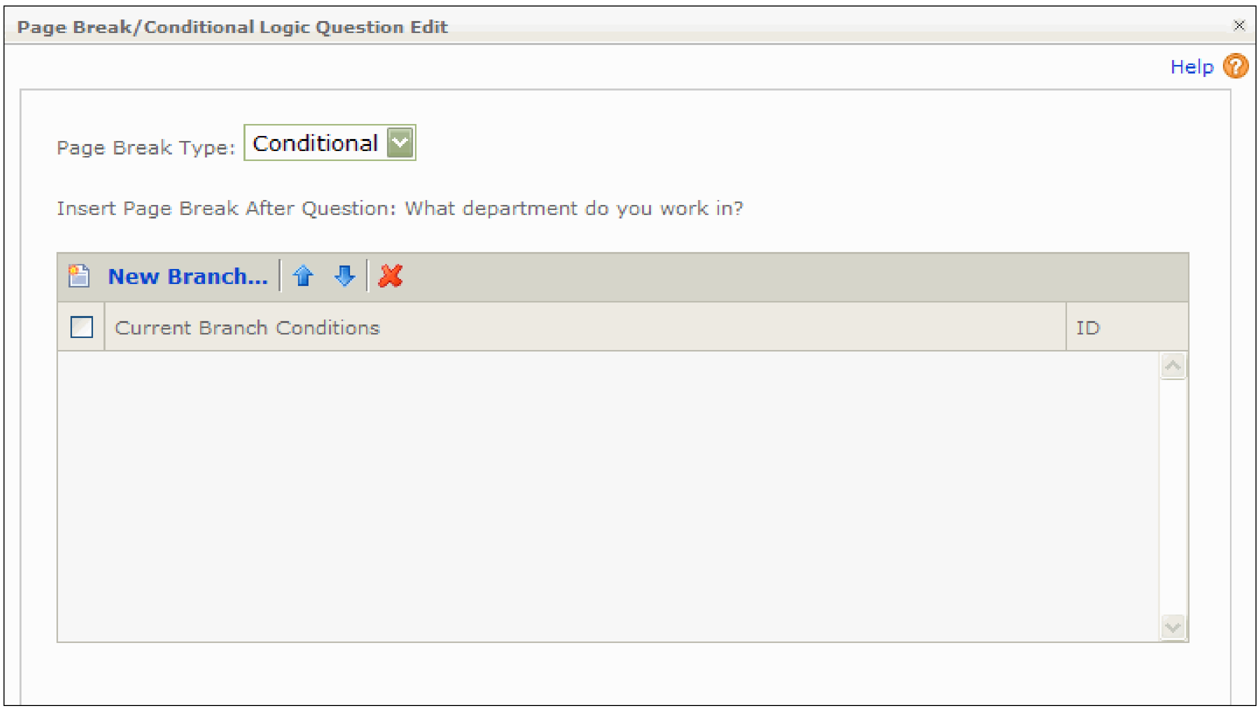
- **Jump to the next question**
- **Jump to a specific question** (drop-down list displays to select question to jump to)
- **Jump to a web address** (text box displays for you to enter web address)
- **Submit survey now**

Note!
Using "Jump to a web address" or "Submit survey now" will take the respondent out of the survey.

To Create a Conditional Page Break

A conditional page break allows you to branch the user through your survey, having them answer only the questions that you want them to see. Break conditions or branches are set up in the page break that send the user to a forward location in the survey based on an answer or answers in any question before the page break. **Multiple branches can be set up within the same conditional break.**

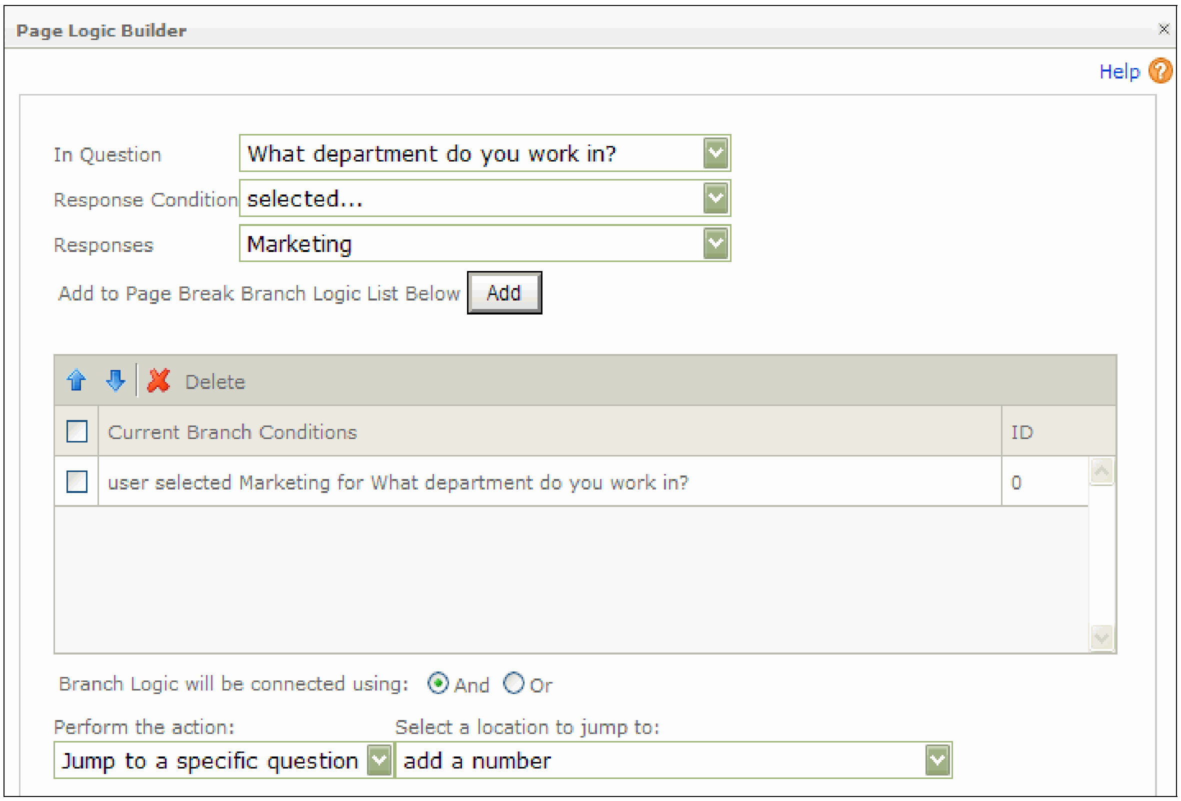
Note!
You should never have back-to-back page breaks in your survey. Branching can only be done forward in the survey. You cannot branch backward to a previous question or perform looping.



Create a Conditional Page Break

1. Click the **New Question** button.
2. Select **Page Break/Conditional Logic** as the Question Type.
3. Use the **Insert Question** drop-down list to position the question in your survey.
4. Click **OK**.
5. Select **Conditional** as the type of page break to be created from the **Page Break Type** drop-down list.
6. The **Current Branch Conditions** list box will be displayed where you will create your conditional branches.
7. Click the **New Branch** button.

8. From the **In Question** drop-down list, select the question you want to base your branch on. When a question is selected, the **Response Condition** and **Responses** drop-down lists will change to match the selected question. (see example below).
9. Under **Response Condition**, choose the appropriate option from the drop-down list.
10. Under **Responses**, choose the response that you want to test against.
11. Click **Add** to create the branch and display it in the **Current Branch Logic** list.
12. Select an action from the **Perform the action** drop-down list.
13. Click **OK**.



Create Conditional Branch

In Question

Select the question you want to test against. The drop-down list will show all available questions to branch against. These questions will all be **prior** to your page break in the survey.

Response Condition

Choose a condition (selected, did not select, greater than, less than, contains, etc.).

Responses

These are the responses for the question you chose to test against. If you chose a text fill-in question or hidden field to test against, you have to type in the value to test for.

Add To Page Break Logic List Below

Click **Add** to enter your conditional branch in the list.

Branch Logic Will Be Connected Using

The **And / Or** operator is used when you are building a complex condition that checks against more than one response. This could mean more than one response from the same question, or from multiple questions.

Perform the Action

There are four actions associated with the **conditional page break**:

- **Jump to next question**
- **Jump to specific question (drop-down list to select question)**
- **Jump to web address (text box to enter Web address)**
- **Submit survey now**

Select A Location To Jump To

This option will only be used when you select **jump to a specific question** or **jump to a web address**. You will select the specific question to jump to from the drop-down list, or enter the Web address in the text box.

Chapter Six

Survey Question Editing

Survey Question Editing

Response Library

You can use the **Response Library** button to add predefined response options to your question. A drop-down menu displays the various categories of response options that are available.

Response option categories are:

- My Library
- Demographics
- Job Related
- Miscellaneous
- Monetary
- Rating
- Technology
- Time Based
- Days Of Week
- Yes or No

To Add Responses from a Response Library

1. Click the **Response Library** button on the **List Edit Tool Bar**.
2. Select a category of responses from the menu.
3. When clicked, the responses from that category are added to your survey question.
4. Click **OK**.

Create Your Own Response Library

You can also create your own Response Libraries which can be stored and used for future surveys. These libraries will display under the **My Library** category above.

Steps

1. In your survey question, select the response options to be added to the library by clicking the check box next to them, or click the check box on the left side of the **List Edit Tool Bar** to **select all check boxes**.
2. Click the **Add To Library** icon in the **List Edit Tool Bar**. You will be prompted to give the library a name. (see below)
3. Click **OK**.

Name Your Response Library

To Add Responses from My Library

1. Click the **Response Library** button.
2. Select **My Library**.
3. Select the saved library that you want and those responses will be added to your question.

Add Multiple Responses

You can add multiple response options to your questions by using the **Add Multiple Responses** button on the **List Edit Tool Bar**.

To Add Multiple Responses

1. Click the **Add Multiple Responses** button on the **List Edit Tool Bar**.
2. Type or copy/paste your response options into the text box provided, with one response option per line.
3. Click the **Add Responses** button.

Data Piping

You can take data entered or selected as a response and pass it forward to be displayed at another location in the survey with the **Data Piping** feature. It is recommended that you have all your survey questions created first.

Note!
You cannot pipe data from matrix, side-by-side matrix, or HTML snippet question types.

Note!
You must have a Page Break before the receiving question in your question list for the data to be piped in.

To pipe data, a **special syntax** is required to pass the piped field and display it. Piping syntax is inserted into the **receiving** question. The syntax uses the wsb number (ID number) of the question as follows:

%q0lbl%

- **'q0' in the syntax example above represents the question in your survey you are piping from with an ID number of 0 (wsb0 in your question list)**
- **'lbl' enables the actual response text to display**

Note!
If the piping syntax does not contain the 'lbl' designator, the ID number of the selected response will be displayed instead of the response text.

If you cannot see your wsb numbers, check My Preferences to make sure they are not set to be hidden from view. Navigate to this option by clicking the **My Account** tab and selecting the **My Preferences** tab.

How to Set Up Data Piping

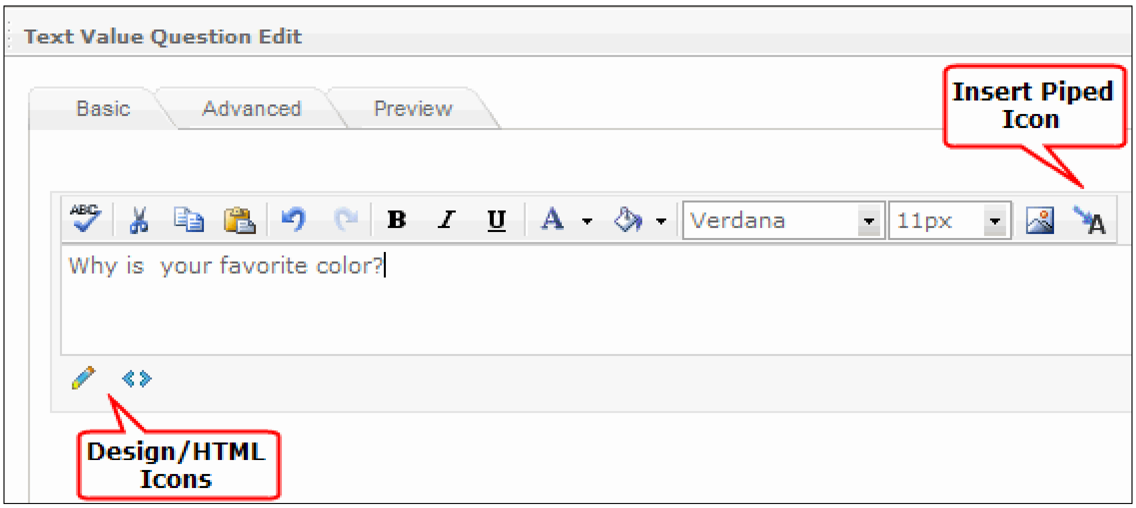
Piping syntax can be inserted in your **receiving** question using the **Insert Piped** icon (see image below) on **Editing Tool Bar**, or you can type it in **manually**.

Method One (auto)

1. Click on your **receiving** question to edit it. You will leave space in the question text where the piped value will be displayed.
2. With you cursor in the location where the piped data is to be displayed, click the **Insert Piped** button.
3. A dialog is displayed with a drop-down list of the available questions to pipe from.
4. Select the data to be piped from the drop-down list.
5. Click **OK** to close the piping dialog.
6. The piping syntax is now inserted into your question text in the **Question Edit** dialog.
7. Click **OK** to close the **Question Edit** dialog.

Method Two (manual)

1. Click on your **receiving** question to edit it. You will leave space in the question text where the piped value will be displayed.
2. With your cursor in the location where the piped data is to be displayed, click the **HTML** icon.
3. The question is changed to HTML edit mode.
4. Type in the **piping syntax** in the appropriate location in the question text.
5. Clicking the **Design** icon will return the question view to normal.
6. The **piping syntax** is now inserted into your question text in the **Question Edit** dialog.
7. Click **OK**.



Data Piping Setup

Example:
Assume you have a Choose One question:

What is your favorite color?

- red
- yellow
- green
- blue

This question has an ID number of **wsb0**.

-----SIMPLE PAGE BREAK-----

Your receiving question will look like this:

Why is **%q0lbl%** your favorite color?

When the survey is taken, the syntax in the receiving question (**%q0lbl%**) will be replaced by whatever response the user selected in the first question.

Required Questions

You can set your question to be **required** so that respondents must answer the question before moving to another page of the survey or submitting the survey.

If a required question is not answered and the respondent attempts to navigate to another page or submit the survey, a popup message alert will display advising the respondent that an answer is required. Different question types have different **messages** in the alert box. The alert messages can be edited by navigating to **Properties/Languages & Messages/Validation Message** from the **Question List Pane**.

There are two methods for requiring questions:

- within the individual question
- from the **Question List Pane**

Set required from within the question

You can make the following question types required by going to the **Advanced** tab of the **question** while in editing mode and selecting the check box for **'Require this question to be answered in the survey '**:

- Choose One
- Choose All That Apply
- Fill In The Blank
- Essay
- Numeric Value
- Date Value
- Rank Order

You can make the following question type required by selecting the **Advanced** tab of the **response field** while in editing mode and selecting the check box for **'Require this question to be answered in the survey '**:

- Data Block
  All response fields or only particular ones can be required.

You can make the following question types required by selecting the **Advanced** tab when in editing mode, and then selecting the check box for each category in the **Required** box at the bottom left of the dialog:

- Choose One Matrix
- Choose All That Apply Matrix
- Side-By-Side Matrix (select a **side** then select the **Advanced** tab)
  All categories or only particular ones can be required.

Set required from the Question List Pane

Questions can be required from the **Question List Tool Bar**.

1. Select the check box of the question you want to require.
2. Click the **Required** button on the right side of the tool bar.
3. The question will have the **required** icon placed in the far right column.

Note!
You can require all of your questions at once by selecting the check box on the far left side of the Question List Tool Bar and then clicking the Required button.

You can remove the required status by selecting the check boxes then clicking the Required button.

Disable / Enable a Question

Disabling a question **turns off** the question without deleting it so that it is not visible in your survey.

Disable a Question from the Advanced Tab

1. Select the question to be disabled in the **Question List Pane**.
2. Select the **Advanced Tab**.
3. Select the check box that reads '**Disable this question in the survey**.'
4. Click **OK**.

Note!
For Side-By-Side Matrix questions, the disable function is located on the Basic tab just under the question text box.

Disable a Question from the Question List Pane

1. Select the check box to the left of the question to be disabled.
2. Click the **Disabled** button on the right side of the **List Edit Tool Bar**.
3. The question is disabled and the disabled status icon is placed in the far right column.

Enable a Question from the Advanced Tab

Enabling a question **turns on** a question that has been disabled so that it is again visible in your survey.

1. Select the question to be enabled by clicking on the question text in the **Question List Pane**.
2. Select the **Advanced Tab**.
3. Clear the check box that reads '**Disable this question in the survey**.'
4. Click **OK**.

Enable a Question from the Question List Pane

1. Select the check box to the left of the question to be disabled.
2. Click the **Disabled** button on the right side of the **List Edit Tool Bar**.
3. The icon is cleared and the question is enabled.

Chapter Seven

Publishing Your Survey

Discussed in this Chapter

Publishing / Republishing Your Survey

Publishing Your Survey

Publishing Your Survey

Once your survey has been finalized you will need to **publish** it to make it available to your respondents. The publishing process produces the link (URL) your respondents will use to access the survey.

Steps

1. Go to the main **Feedback Page**.
2. Select the survey you want to publish from the **Survey List Pane**.
3. With the survey highlighted, select **Publish Survey** from the **Options Pane**.
4. Click the **Publish** button in the tool bar.

Ensure survey is accessible through SSL

You can publish your survey as a Secure Survey, which is protected by 128-bit SSL encryption. You can enable the Secure Survey feature **(SSL)** from the **Publish Tab** by selecting the check box to **'Ensure survey is accessible through SSL.'**

Republishing

Once you have published a survey, you may decide to make cosmetic changes to it. Initially your changes are contained in a working version of the survey. In order for changes to take effect in the published version, you have to **republish** the survey.

To **republish** a survey, select **Publish Survey** from the **Options Pane**. The survey URL will be displayed and the button on the Publish Tab will now read '**Republish**.' Click the **Republish** button to update the survey.

Warning!
Use great caution when editing a survey that has already been published and has collected data. Each question and response option has a unique wsb number (internal ID number) that was assigned when it was created. If you delete a question or response option, then add it back into the survey, the wsb number changes. Any data that had been collected against the original wsb number will be orphaned and you won't be able to view it.

If you have to make changes to questions or response options in a live survey, edit only the text label portion without deleting the entire item.

Republishing will **permanently** apply the changes.

Chapter Eight

Mailing Lists

Discussed in this Chapter

Mailing Lists Home Page

Mailing Lists Overview

Use: The **Mailing Lists** feature is used to create an invitation for recipients to take your survey, and then send it to all the recipients in your mailing list.

Go to the Mailing Lists **Getting Started** section for more details.

There are four main components in the Mailing Lists Options Pane:

- **Edit Mailing List**
- **Manage E-mail Campaigns**
- **Gateway Surveys**
- **Edit Recipient Filters**

Edit Mailing List

The **Mailing List** is the list of recipients that will be invited to take your survey. It will contain the E-mail addresses of the recipients as well as any other information that may be passed into the survey results. This option is where you will create, edit and review your mailing lists.

Manage Campaigns

A **campaign** is the message you will send via E-mail inviting recipients to take your survey. The message can be in standard text format and also supports HTML formatting, and contains the link to your survey. This option is where you will create the message to be sent and set parameters for the campaign.

Gateway Surveys

Using the **gateway** feature, you can restrict access to your survey and require that respondents log in to access your survey. You can select a '**UserID**' field to require login for the survey, or you can select a '**Password**' field which would require both login and password for the survey.

Edit Recipient Filters

You can set up filters for your mailing list and send the campaign (your E-mail invitation) to a specific set of people on your list.

Mailing Lists Getting Started

The main steps in setting up a mailing list and sending an invitation to take your survey are:

- **Create a Mailing List**
- **Create a Campaign**
- **Field Mapping**

Other features that can be utilized are:

- **Setting up a Gateway Page**
- **Scheduling a Campaign**
- **Setting up a Recipient Filter**
- **Sending Reminder, Follow-up and Thank You jobs**

Create a Mailing List

You must first **create a list** which will contain all the recipients to be invited to take your survey. The list will contain the E-mail address of each recipient as well as any other information you want to include such as First Name, Last Name, etc.

When you first create your list structure, you are placed in the List Edit mode and the list column headers are displayed. The list has predefined columns for **Unique ID** and **E-mail** as well as 20 additional columns that can be used to hold other information such as Name, Last Name, etc. These columns can be renamed (recommended) so that the **column headers** are meaningful and relate to the data that will be stored there. Renaming these columns will also simplify the field mapping step if you import your data from a CSV file into the list.

Once your list structure has been created, the next step is to add the data to your list. The most common method of adding data to a mailing list is to **import** the data from a **CSV** (comma separated values) file. Data can also be added to a list **manually** or through the **Add Multiple E-Mails** feature.

Note!
Survey results also have predefined columns for UniqueID and Email. These columns are empty unless values are forced into them. Using the field mapping process when you create your campaign, you can have designated values from your mailing list display in these columns in your survey results. This is useful when it is necessary to identify who responded to your survey.

Create a Campaign

When you have created your **mailing list**, you then have to **create a campaign** which is the message to be sent to your mailing list recipients inviting them to take your survey. The campaign is linked to the mailing list through the **Field Mapping** tab. Field mapping connects the appropriate data columns in the mailing list to values that may be used in your message.

Field Mapping

Field mapping in your mailing list is used to connect specific fields in your **CSV file** (usually viewed in Excel) to data columns in your **mailing list**.

Field mapping a campaign is used to associate your **survey** with your **mailing list**. The field mapping process may also include linking **hidden fields** used in your survey to the appropriate data columns in your mailing list to capture data from your recipients without requesting them to enter it. The values are pulled from the **mailing list** and populated in your survey results.

Tip!
If you want to track who responded to your survey, and you do not have any hidden fields in your survey, you can map the E-Mail field from your mailing list to UniqueID when you set up your campaign. This will populate the UniqueID column in your survey results with the respondent's E-mail address from the list.

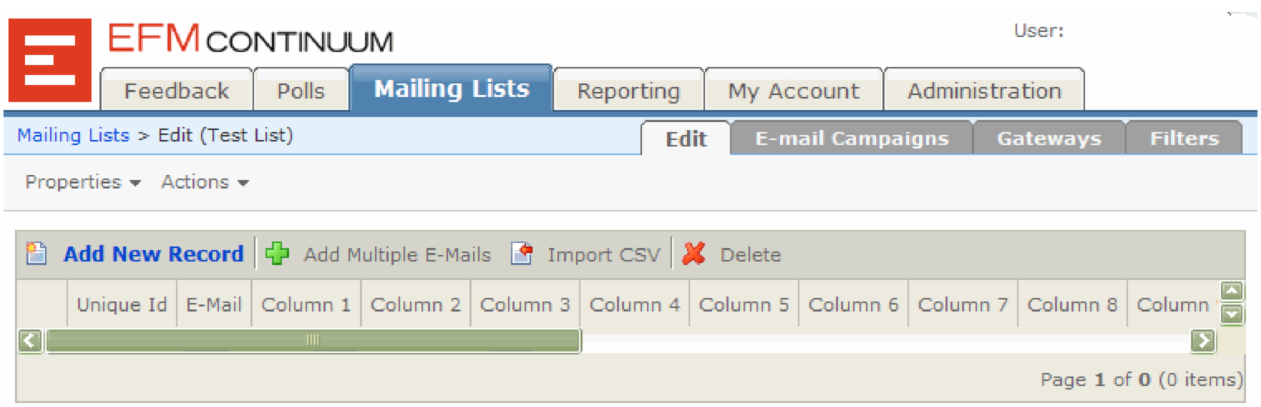
How to Create a Mailing List

Creating a mailing list involves two main steps. You have to create the **list structure** and give it a name, and you have to populate the list with the recipient data.

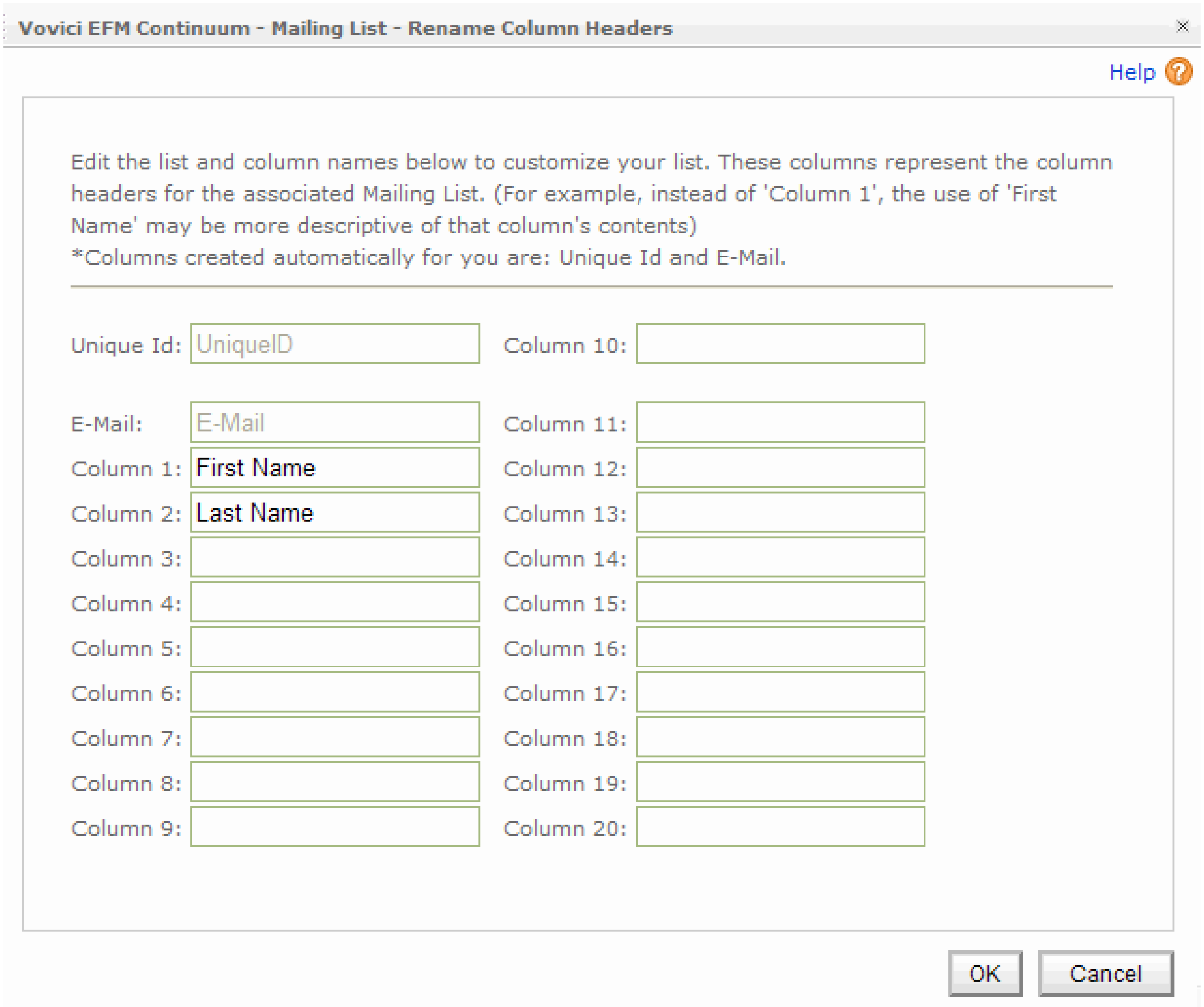
Create the List Structure (List Properties)

1. From the Mailing Lists Home Page, click the **Create Mailing List** button and a Create New List dialog is displayed.
2. Provide a **List Name** in the text box and select the check box for the Vovici Anti-Spam policy.
3. Click **OK**.
4. You will be placed in **Edit** mode to create your list (see example below). Columns are predefined for **UniqueID** and **Email** address. The additional 20 columns can be used to hold any other data that you want in your list. Examples are First Name, Last Name, etc.
5. To rename the Column Headings, click the down arrow next to the **Properties** drop-down menu and select the **Column Headers** option. The Rename Column Headers dialog displays (see example below).
6. Enter column names in the text boxes provided for each column you want to rename.
7. Click **OK**. The list display is updated to show the Column Headers you added (see example below). You are now ready to add data to your list.

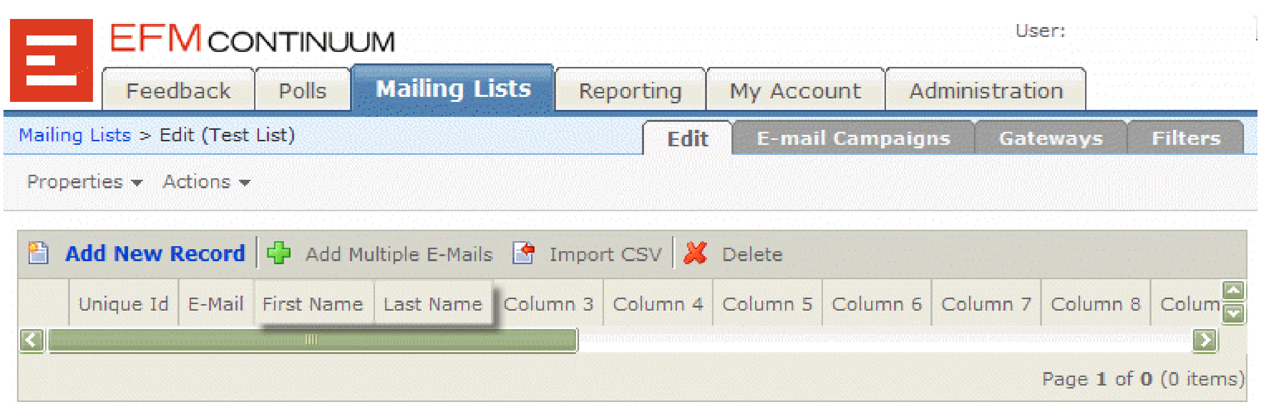
Tip!
You can change your list name (if necessary) by selecting List Name from the Properties drop-down menu while in Edit mode and entering the new list name.



Mailing Lists - Edit Mode



Mailing Lists - Rename Column Headers



Mailing Lists - Column Headers Applied

Gateway

Using the **gateway** feature, you can restrict access to your survey and require that respondents log in to be able to access your survey. You can select a '**UserID**' field to require a login ID for the survey, or you can select a '**Password**' field which would require both a login ID and a password for the survey.

Add Your List Data

Note the **Actions** drop-down menu just above the List Pane containing these options:

- **Add Multiple E-Mails** - You can use this method to quickly enter a list of simple E-mail addresses.
- **Import CSV List** - You can use this method to import your data from a CSV file.
- **Export List** - You can export your list to a CSV or XML file.
- **Unsubscribe Recipient(s)** - You can include a link in your campaign to allow users to unsubscribe. Clicking the unsubscribe link will delete their record from your mailing list.

You can also populate your mailing list by adding new records manually.

Alert!
When adding data to your list, the E-mail addresses <u>must</u> be in the predefined E-Mail column in order for the invitations to be sent.

Add New Record Manually

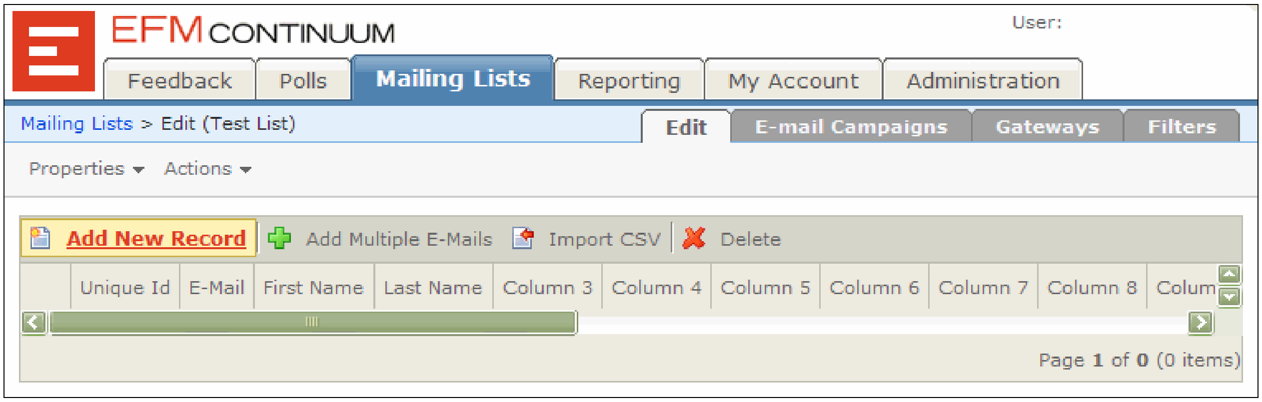
You can add records to your mailing list manually. This method is best suited for situations where the survey audience is small, and the amount of data to be entered in the list is minimal.

Steps

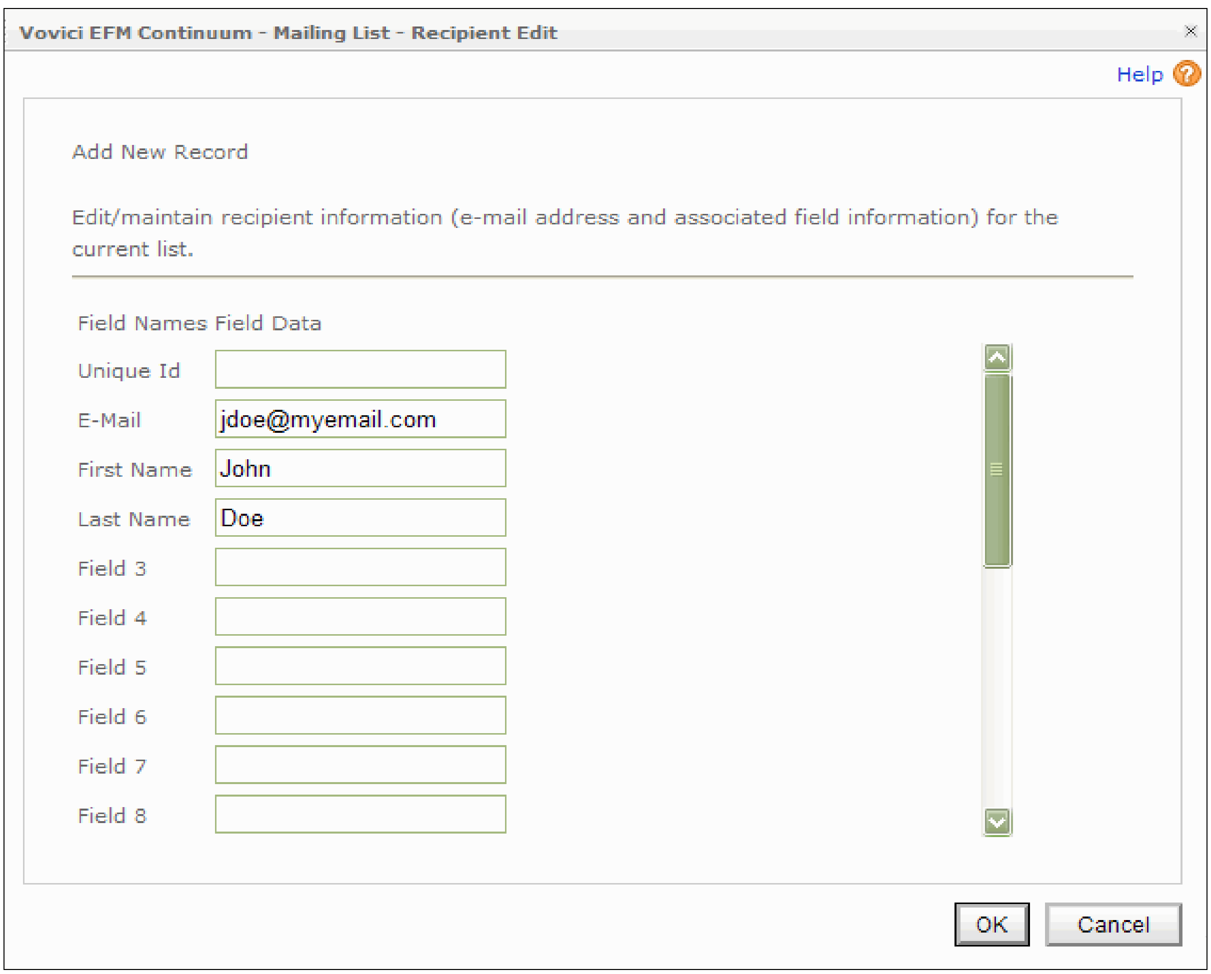
1. From the Mailing Lists Home Page, click the list name to be edited and select **Edit Mailing List** from the Options Pane.
2. Click the **Add New Record** button (see example below).
3. Enter appropriate data in fields as needed (see example below).
4. Click **OK**.

To edit a record that already exists

1. Select the list to be edited and click **Edit Mailing List**.
2. Click the **E-mail** address of the record to be edited.
3. Edit the fields as needed, click **OK**.



Mailing Lists - Add New Record Manually



Mailing Lists - Add Record Data Manually

Add Multiple E-Mails

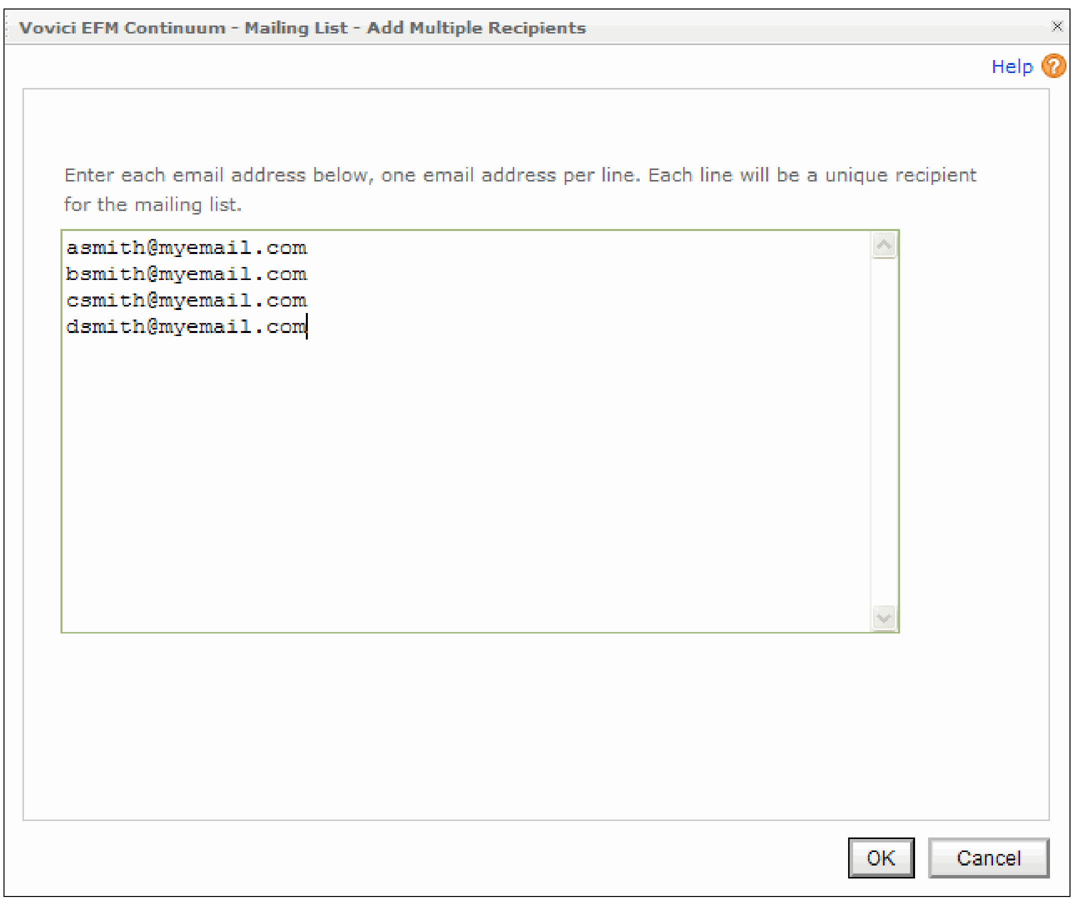
To navigate to the **Add Multiple E-Mails** option, go to the Mailing Lists Home Page and select a mailing list from the List Pane. Click **Edit Mailing List** and you are placed in the Edit Tab.

The **Add Multiple E-Mails** option is located under the **Actions** drop-down menu.

This option is used when you want to add a list of simple **E-mail addresses**. All the E-mail addresses will be inserted into your mailing list at the same time.

Steps

1. From the Mailing Lists Home Page, click on the name of your mailing list then select **Edit Mailing List** from the Options Pane.
2. From the **Actions** drop-down menu, select **Add Multiple E-Mails**.
3. A page displays with a text box where you enter your E-mail addresses, one per line. E-mail addresses can be typed in or copied and pasted from another application. Each E-mail address will be a separate record in your mailing list (see example below).
4. Click **OK**.



Mailing Lists - Add Multiple E-mails

Import CSV List

To navigate to the **Import CSV List** option, go to the Mailing Lists Home Page and select a mailing list from the List Pane. Click **Edit Mailing List** and you are placed in the Edit Tab.

The **Import CSV List** option is located under the **Actions** drop-down menu.

It is recommended that you use Excel to work with your **CSV (Comma Separated Values)** file. The file should be created with the first row containing column headers and must be saved in CSV format to facilitate proper importing.

Steps to create your CSV file

1. To create a **CSV file**, open an Excel spreadsheet.
2. Create column headings in the first row of the CSV file.
3. Enter the appropriate data in the columns.
4. Save the file as a **CSV file.** (In the “Save as Type” text box, select the down arrow and choose CSV from the list file types).

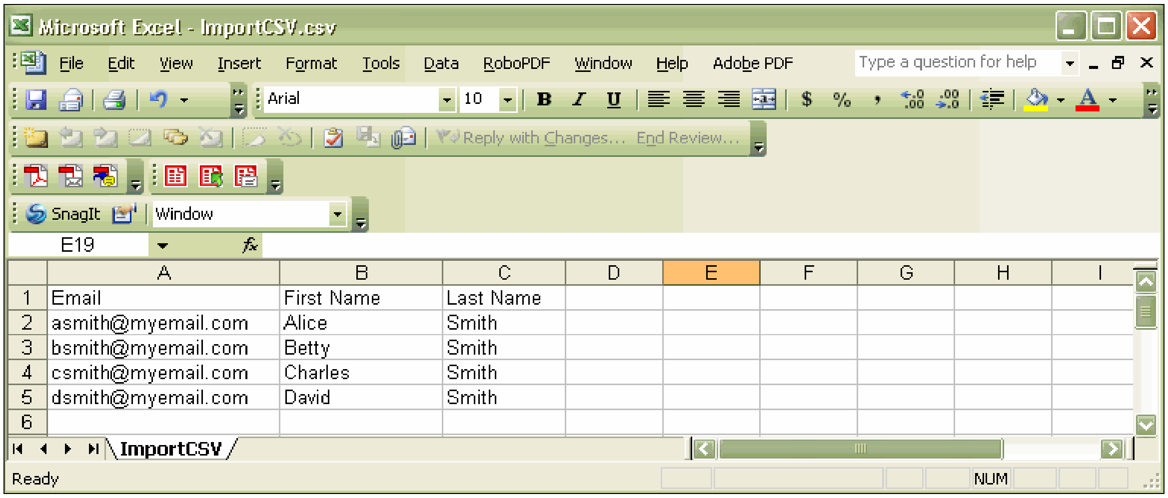
Steps to Import your CSV file

1. Go back to your EFM Feedback application and while in **Edit mode (edit tab)**, select **Import CSV List** from the **Actions** drop-down menu.
2. On the **CSV Import** page, select **Append**. This will add your data to the mailing list. Selecting **Replace** will overwrite data in an existing list with the information contained in the CSV file.
3. Select **'Update existing records that match'** if you want to update only those existing records that match a certain field selected from the drop-down list.
4. Click **Browse** to navigate to your CSV file.
5. Select the check box for **'The first row in the CSV file contains the column headings.'**
6. Click **Next**.
7. Click **OK**.
8. On the **Choose field mapping** screen, you will use the drop-down lists to link the data from your CSV file to the correct column in your mailing list. The names in the left columns represent your **mailing list**, and the names in the **drop-down lists** represent your **CSV file**.
9. Match the name on the left with the corresponding name in the drop-down list on the right. The field for **Unique ID** is optional. You can leave it blank if you do not have a unique ID.
10. Click **Finish**.

Alert!
The Email drop-down menu MUST be mapped for your campaign to be sent.

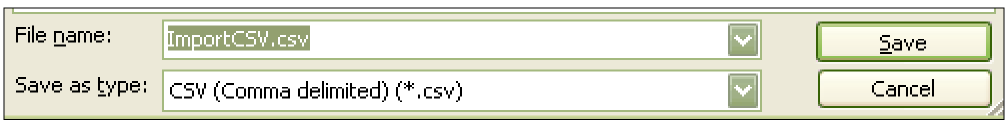
The CSV data is imported into your mailing list and you are again placed in the **Edit mode** of the mailing list.

If you need to edit a record after you have imported the data, you can do so by clicking on the E-Mail address of the record. The Edit Record dialog will display and you can make any necessary changes.

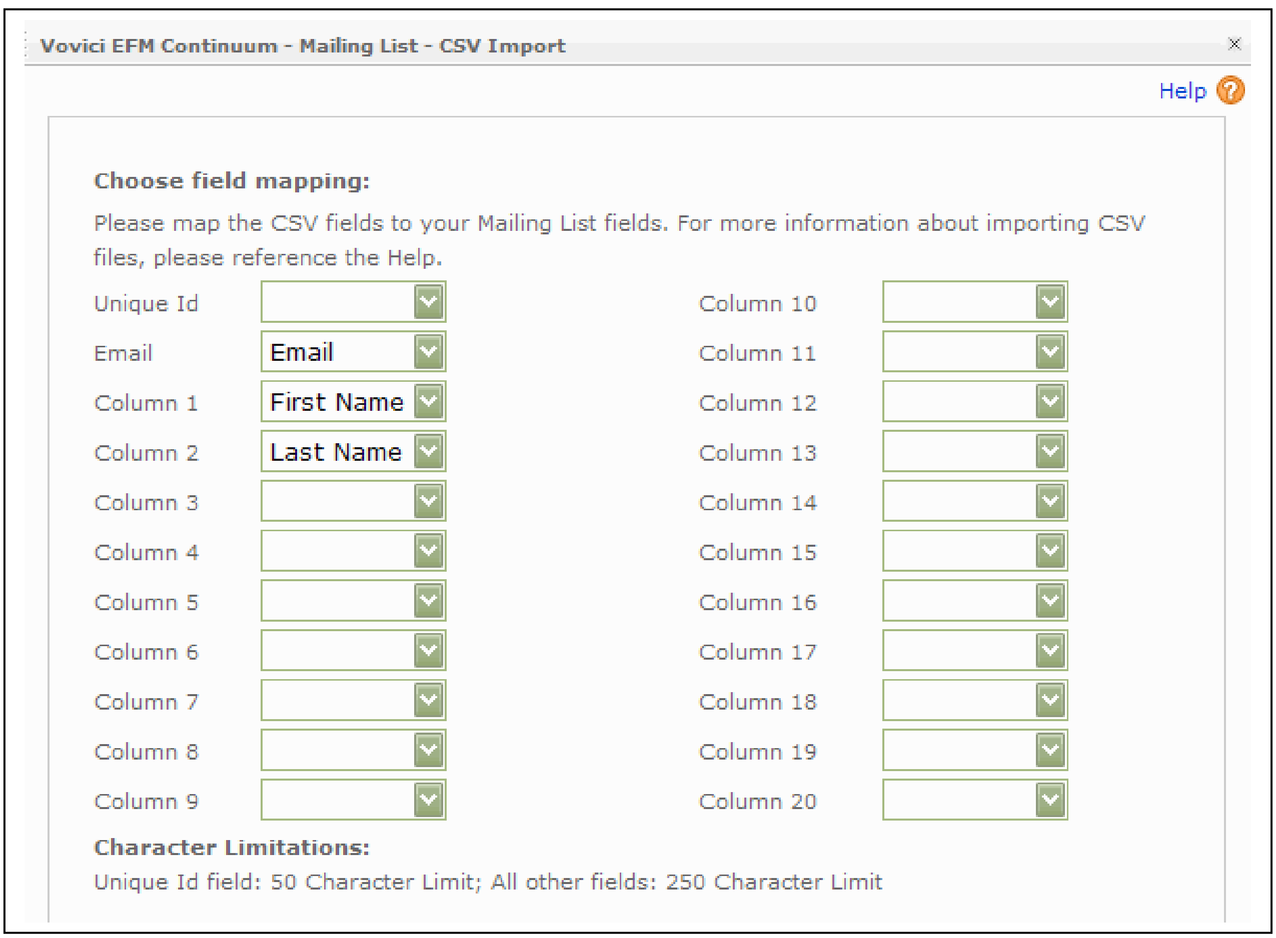


CSV File in MS Excel

When the file is saved, select CSV as the **Save as Type** and save in the folder of your choice.



CSV Save as Type



CSV Import – Choose field mapping

Example:
UDF fields (User Defined Fields) are often used in a campaign to personalize the invitation that is being sent to recipients. These UDF fields in your campaign get their names from the **Column Headers** in your mailing list.

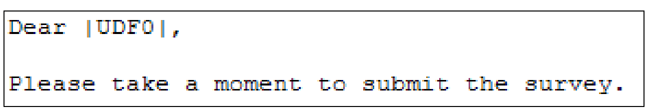
Assume your mailing list has a column of data for the **First Name** of your recipients.

- Under **Properties/Column Headers**, enter 'First Name' in the **Column 1** text box.
- Click **OK**.

When you create a campaign and type your campaign message, the Column names will be listed to the right of the message text in the **Available Fields** box.

Available Fields

- Click **First Name** in the **Available Fields** box and that UDF field is inserted into your message. UDF fields are placed at the **bottom** of the message by default.
- Use 'cut' (**Ctl-x)** to remove the field from the bottom of the message. Place your cursor in the desired location in the message then 'paste' **(Ctl-v)** the UDF field. The UDF field is linked to your mailing list and is used to insert the data from the **First Name** column in your list into your campaign message as shown below:



UDF Field Usage in a Campaign Message

When the message is sent to the recipient, their first name will replace the UDF value in the message and the greeting will be personalized.

Export List

To navigate to the **Export List** option, go to the Mailing Lists Home Page and select a mailing list from the List Pane. Click **Edit Mailing List** and you are placed in the Edit Tab.

The **Export List** option is located under the **Actions** drop-down menu.

You can export your mailing list to a CSV file (Comma Separated Values) or to an XML file (Extensible Markup Language).

Alert!
If you are exporting a very large list to a CSV file, file size limitations in Excel could prevent you from being able to export the entire list.

Steps

1. Select **Export List** from the **Actions** drop-down menu on the Mailing Lists Edit Tab.
2. Select **CSV** (Comma Separated Values) or **XML** (Extensible Markup Language).
3. Click **Export**.
4. Select **Open** or **Save**. If you **save** the file to your computer, navigate to the location where you want to save the file and click **Save**.

Note!
You can rename the file or save it with the default name provided.

Unsubscribe Recipient(s)

To navigate to the **Unsubscribe Recipient(s)** option, go to the Mailing Lists Home Page and select a mailing list from the List Pane. Click **Edit Mailing List** and you are placed in the Edit Tab.

The **Unsubscribe Recipient(s)** option is located under the **Actions** drop-down menu.

Use this option to remove unwanted E-mail addresses from your mailing list.

First create a text file with all of the E-mail addresses you want to remove from your mailing list.

Note: Copy and paste the E-mail addresses to the text file or simply type them. You should have only one address per line.

Example:
asmith@myemail.com
bsmith@myemail.com
csmith@myemail.com

Save the text file and follow the steps below to delete the E-mails you compiled in your text file from your selected mailing list.

Steps

1. Select a mailing list by clicking on its title from the Mailing Lists Home Page.
2. Click **Edit Mailing List**.
3. In the **Actions** drop-down menu, select **Unsubscribe Recipient(s)**.
4. Use the **Browse** button to navigate to the text file containing the unsubscribe addresses.
5. Click **Unsubscribe**.
6. The E-Mail addresses are removed from your mailing list.

Tip!
You can also remove recipients from your mailing list by adding the 'Unsubscribe URL' to your invitation message from the Available Fields box on the Campaigns Message Edit Tab. If one of your recipients desires to be removed from your mailing list, they simply click the 'Unsubscribe' URL and they are automatically deleted from your list.

Field Mapping a Mailing List

When you import a mailing list from a CSV file (usually viewed in Excel), it is necessary to **choose field mapping** to ensure that data from your **CSV file** is imported into the proper columns in your **mailing list**. There are two columns of drop-down lists displayed on the **Choose field mapping** page.

There are predefined column names for **Unique ID** and **Email** on the left side. There are 20 additional fields that can be used to hold data that you may want to pass into your survey results. You should **rename these fields** to match field names in your CSV file. Your CSV file should be saved with the **first row containing the column header names**.

Note!
A mailing list has predefined columns for Unique ID and Email which do not have to be renamed. Data values for Unique ID are not required but may be helpful. A Unique ID could be something as simple as a chronological number (i.e., 1,2,3)

Alert!
The Email drop-down text box MUST be mapped for your campaign to be sent. In your mailing list, the E-mail addresses must be in the predefined E-Mail column. Map E-mail in your mailing list to Email in your drop-down text box. This will ensure that all of your E-mail addresses are placed in the proper column in your mailing list to be used in sending your campaign.

Steps

1. To navigate to the Edit Tab, from the Mailing Lists Home Page select a mailing list from the List Pane and click Edit Mailing List.
2. Select **Import CSV List** from the **Actions** drop-down menu, or select it from the Editing Tool Bar.
3. On the **CSV File to Import** page, select **Append** if this is a new list or you are adding to another list. Select **Replace** to overwrite an existing list.
4. Select **'update existing record that match'** if you want to update only those existing records that match a certain field selected from the drop-down list.
5. Click **Browse** to navigate to your CSV file.
6. Select the check box for **'The first row in the CSV file contains the column headings.'**
7. Click **Next**.
8. On the **Choose field mapping** screen, you will use the drop-down lists to link the data from your CSV file to the correct column in your mailing list. The names in the **left columns** represent your **mailing list**, and the names in the **drop-down lists** represent your **CSV file**.
9. Match the name on the left with the corresponding name in the drop-down list on the right. The field for **Unique ID** is optional. You can leave it blank if you do not have a unique ID.
10. Click **Finish**.

You can also perform field mapping when setting up your campaign to enable tracking of your survey respondents or to pass information from the mailing list into your survey results.

Mailing Lists Properties Menu

Mailing Lists Properties Overview

The **Properties** drop-down menu is accessed when you select **Edit Mailing List**. To navigate to this location, from the Mailing Lists Home Page, select a mailing list from the List Pane and click Edit Mailing List.

There are three options on the **Properties** menu:

- **Column Headers**
- **Gateway**
- **List Name**

Column Headers

When you create a mailing list structure, there are columns that are predefined for **UniqueID** and **Email** address. There are 20 additional available columns that can be used to hold other data that you may need to have in your list. They are referred to as **UDF (user defined fields)**. Each one has a default name of 'Column #' followed by a text box.

You can name these columns to match data columns in your CSV file.

To rename columns:

1. Enter your column name in the text box.
2. Click **OK**.

Gateway

If you want to restrict access to your survey, you can set it up with a Gateway Page which requires the respondent to login to take your survey.

The login values are set through the **Gateway** option under the **Properties** drop-down menu when the **list structure is created**. If the login values are not specified in this option when the list is created, they can be specified from the **Basic Tab** under the **Create New Gateway** option.

A gateway page can be set up using one login value for a **User ID** field, or two login values can be used to require the respondent to enter a **User ID** and **Password**.

If you wish to change the login values to be used, you can do so through the **Gateway** option under the **Properties** drop-down menu when you **Edit** your mailing list. You can also change login values by editing the gateway field mapping on the **Gateways Tab** under **Mailing Lists**.

List Name

When you create a mailing list the first thing that is required is that you name the list. You simply provide a list name in the text box and click **OK**.

If you need to change the list name at a later time, you can do so by selecting the **List Name** option under the **Properties** drop-down menu when you select **Edit Mailing List**.

Mailing Lists Actions Menu

Mailing Lists Actions Overview

The **Actions** drop-down menu is accessed when you select **Edit Mailing List**. To navigate to this location, from the Mailing Lists Home Page, select a mailing list from the List Pane and click Edit Mailing List.

There are four options on this menu:

- **Add Multiple Emails**
- **Import CSV List**
- **Export List**
- **Unsubscribe Recipients**

Add Multiple Emails

This option is best suited for mailing lists that will contain only Email addresses.

You can enter your email addresses in the text box provided, one E-mail address per line, and add them all into your mailing list at the same time. Punctuation is not necessary.

Import CSV List

This option is the most frequently used method for adding data to your mailing list. The CSV (Comma Separated Values) file will contain all your list data. Each column of data will have a **column header** which will be utilized in the field mapping process during the import to help associate the data in your CSV file with the proper column in your mailing list.

Note!
To properly import your list, it must be in CSV format. If you create the list yourself, you can create it in Excel and save it as a CSV file. Simply select the CSV file type from the drop-down list when you save the file.

Export List

With this option you can export your mailing list out of the application into either a CSV (Comma Separated Values) file or to an XML (Extensible Markup Language) file.

Alert!
If you are exporting a very large list to a CSV file, file size limitations in Excel could prevent you from being able to export the entire list.

Unsubscribe Recipients

You can use this option to remove email addresses from your mailing list if recipients no want to receive invitations. The addresses are saved in a text file with one address per line. When the **unsubscribe option** is applied, the addresses in the text file are deleted from your mailing list.

Working with Gateway Pages

Create New Gateway

You can limit the people who have access to your survey by enabling a gateway page which will require them to log in using values from your **Mailing List**. The login values on the gateway page are verified against the values in your mailing list.

The **Create New Gateway** feature can be accessed by selecting **Mailing Lists** from the Page Navigation tabs at the top of the page, selecting a mailing list from the **List Pane** and then selecting **Gateway Surveys** from the **Options Pane**.

A gateway page can be setup using one login value for a **UserID** field, or two login values can be used to require the user to enter a **UserID** and **Password**. The login values are set through the **Gateway** option under the **Properties** drop-down menu when the list structure is created. If the login values are not specified when the list is created, they can be specified from the **Basic Tab** under the **Create New Gateway** option.

If you wish to change the login values to be used, you can do so through the **Gateway** option under the **Properties** drop-down menu when you select **Edit Mailing List**. You can also change login values by editing the gateway field mapping on the **Gateways Tab** under **Mailing Lists**.

Note!
Once the gateway login fields have been defined for a particular mailing list, that gateway can be attached to other surveys. However, all surveys using that gateway will have the same login fields. Login fields cannot be changed for different surveys using the same gateway.

Steps

1. From the **Mailing Lists Page**, select a mailing list name then click **Gateway Surveys** in the **Options Pane**.
2. Click **Create New Gateway**.
3. Select the survey you want to use from the drop-down list.
4. Click **Add Survey Gateway**.
5. On the **Basic Tab**, if you want to restrict survey access to one submission per user, select the check box to '**Allow only one response per authenticated user**.'
6. Select the login fields to be used for **UserID** and/or **Password** from the drop-down lists. The values in the drop-down lists correspond to fields in your Mailing List. The names of the fields that are selected will be the text for the login boxes on the gateway page.
7. If you want to track your respondents or collect information from them through hidden fields, you have to set up the field mapping using the bottom set of drop-down lists. The values on the left represent fields in your **survey** and the values in the drop-down lists represent fields in your **Mailing List**.
8. On the **Template Tab**, you can modify the display of the **Gateway Page**. Click here for more information on **editing your gateway template**.
9. Click **OK**.

Alert!
When using a survey gateway, persistence is associated with the user rather than the machine.

Example:
Sue begins a multi-page survey (with a gateway) on her home computer, and part of the way through the survey she closes the survey and goes to work. Once at work, Sue will be able to continue the survey on her work computer from the first question on the last page she visited. This is applicable to a multi-page survey only because the selected/entered answers are not stored until the user clicks to the next page.

Editing Your Gateway Template

You can edit your gateway template to alter the display of the standard gateway page. This option is located on the **Template Tab** when you select **Create New Gateway**.

A text editing area is provided where you can make code changes to the standard gateway page that normally displays.

You can also enter your own **Authentication Error Message** to be displayed if the login information on the gateway page is incorrect.

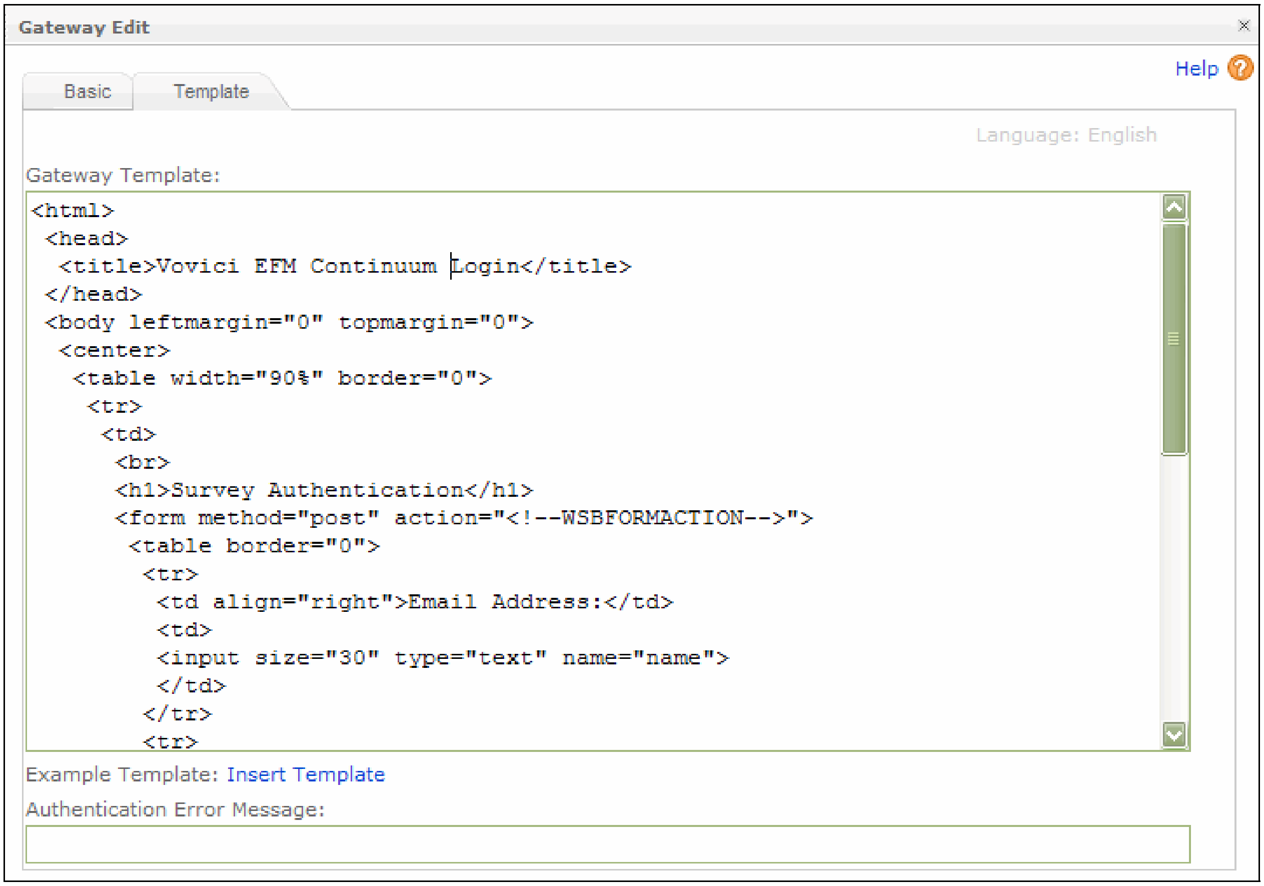
There is a default template example that can be displayed and used as a guide for making your changes. Click the **Insert Template** link under the text box to display the code.

Another method to get the HTML code of the standard gateway page is to click the URL of the survey so that the standard gateway page is displayed. You can then right-click on this page, select **View Source**, then Select All the code and copy it. It can be pasted into the text editing area and modified as necessary.

Click **OK** when your editing is completed.

Note!
Modifying gateway template code requires that you have a good understanding of HTML.

Alert!
Do not remove the tags <!--WSBFORMACTION--> and <!--WSBGATEWAYERROR--> from the gateway page HTML code.



Gateway Edit Page - Default HTML Code

Field Mapping a Gateway Page

When you create a gateway page for your survey, you can track your respondents by collecting their E-mail address or a Unique ID, and you can also collect data for them through **hidden fields** in your survey.

Collecting these data values is accomplished through **field mapping**. Field mapping links your **survey fields** to the corresponding fields in your **mailing list**. When the survey is submitted, the data value from your mailing list is displayed in the corresponding field in your survey results.

Field mapping for a gateway page is done on the **Basic Tab** when you create the gateway page. This tab contains fields with drop-down text boxes in the top portion that define the **login fields** for the gateway page itself and the mapping fields and their drop-down text boxes are in the bottom portion of the tab. These login fields can also be defined through the **Gateway** option under the **Properties** drop-down menu when you **Edit** your mailing list.

Selecting the check box to '**Allow only one response per authenticated user**' will ensure that respondents cannot submit the survey multiple times.
The fields listed on the left side of the **Basic Tab** represent columns in your **survey** results.
The fields listed in the drop-down text boxes represent columns in your **mailing list**.

Note!
Unique ID is a constant column in surveys and mailing lists. It is only populated through field mapping a campaign or field mapping a gateway page.

If your survey has no hidden fields, Unique ID is the only field that will display in the mapping dialog.

Steps

1. From the Mailing Lists Home Page, select your mailing list then click **Gateway Surveys** in the **Options Pane**.
2. Select an existing gateway page to edit, or click on **Create New Gateway**. Field mapping is done on the **Basic Tab** when you are in Gateway Edit Mode.
3. Mapping a value to be displayed in the **Unique ID** field in the survey results is optional. However, it is recommended that you map **Email** to **Unique ID**. This will capture the respondent's E-mail address and display it in your survey results in the Unique ID column.
4. If your **survey** contains hidden fields, those hidden field names and their corresponding ID numbers will be displayed under the Unique ID field. Use the drop-down text boxes to map the corresponding **mailing list** value to these fields.
5. Click **OK**.

Recipient Filters

Filtering Your Mailing List

You can **create a filter** for your mailing list and send your E-mail campaign to a subset of your mailing list based on specified criteria.

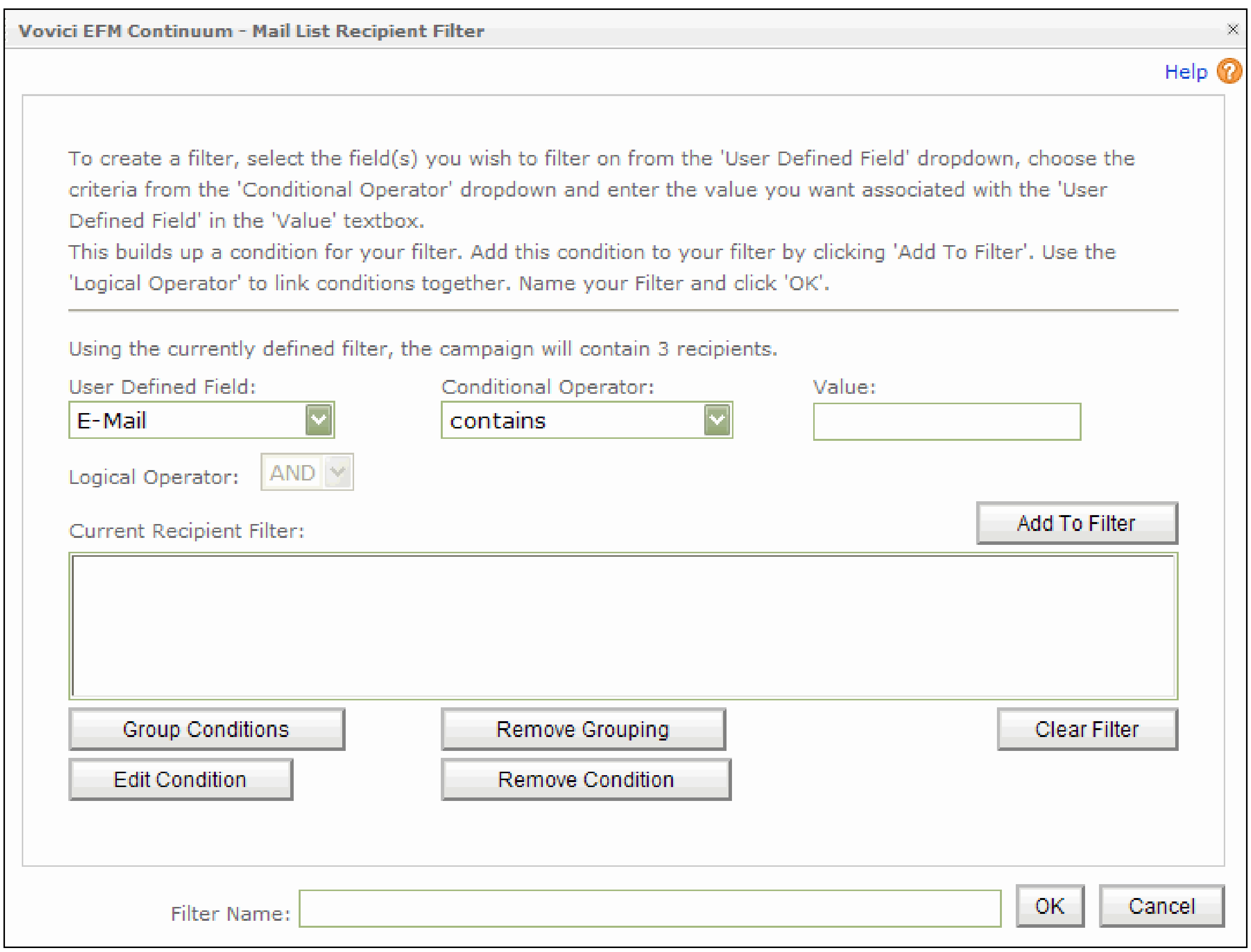
Mailing list **recipient filters** give you the ability to have one central mailing list and define filters on that list to help you better manage who your campaign is sent to.

The option is accessed from the **Mailing Lists Home Page** when you select **Edit Recipient Filters.**

Filter conditions can be grouped using a logical operator (AND/OR). Conditions can be further grouped using the **Group Conditions** option. These groupings can be removed using the **Remove Grouping** option.

Conditions can be **edited** or **removed** using the respective buttons provided.

Once your filter is created, you will provide a Filter Name and **save** it. The filter can then be associated with the message when creating your campaign.



Create New List Filter

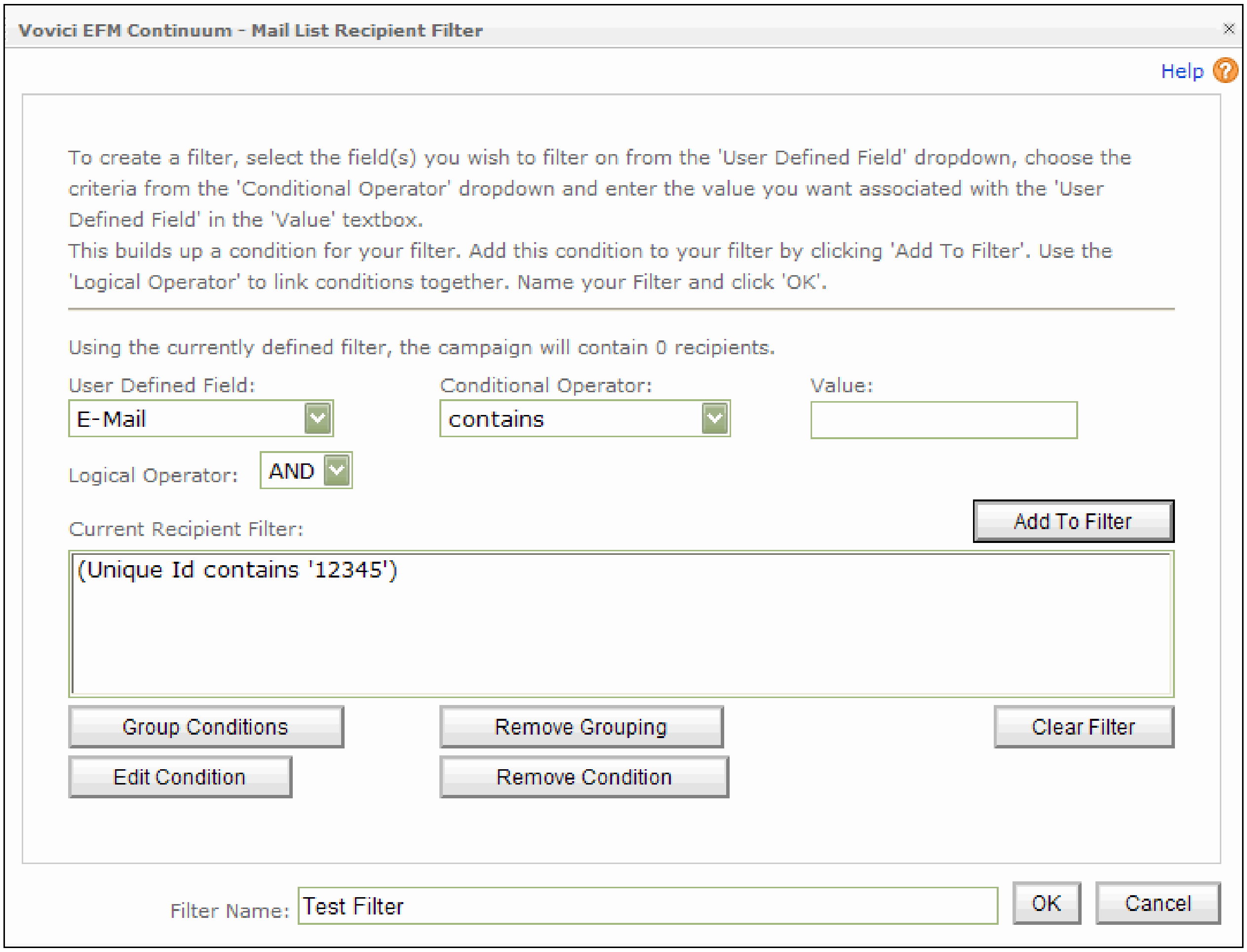
Filtering your mailing list gives you the flexibility to send your campaign to a specified portion of the list. You can create a simple filter containing only one condition or a complex filter that is based on more than one **Value**.

Steps

1. Select your mailing list from the **Mailing Lists Home Page** and choose **Edit Recipient Filters**.
2. Click **Create New Filter**.
3. Select the field you wish to base the filter on from the **User Defined Field** drop-down list.
4. Choose the appropriate **Conditional Operator** from the drop-down list.
5. Enter the value to filter on in the **Value** text box.
6. Click **Add To Filter**. Your filter statement is displayed in the **Current Recipient Filter** text box.
7. Enter a name for your filter in the **Filter Name** text box at the bottom.
8. Click **OK** to save the filter so it can be referenced when you send your campaign.

There are buttons at the bottom of the dialog for the following functions:

- **Group Conditions** - Places parentheses around selected conditions to group them together. Using parentheses will override the default order of evaluation and the conditions in the parentheses will be evaluated first.
- **Remove Grouping** - Removes the parentheses from selected conditions.
- **Edit Condition** - Edit the selected condition.
- **Remove Condition** - Removes the selected condition.
- **Clear Filter** - Clears any filter conditions in the **Current Recipient Filter** text box.



Mailing List Recipient Filter

Chapter Nine

Invite People to Take Your Survey (Campaigns)

Invite People to Take Your Survey (Campaigns)

What is a Campaign?

A **campaign** is the mechanism that associates your survey with your mailing list. It is where you create the message text that will be sent to the recipients in your mailing list inviting them to take part in your survey.

To get started, you will **create a new campaign**.

When you click **Create New Campaign**, the **Message Tab** will be displayed. **Fields** that will be included in your message are:

From Name	The name of the person sending the campaign.
From Address	The confirmed E-mail address of the person sending the campaign.
New...	This link is used to confirm additional E-mail addresses to be used in sending your campaigns.
Reply To Address	The E-mail address recipients can send a reply to.
Associated Survey	The title of the survey you are inviting recipients to submit.
Subject	The subject line of the E-mail message you are sending to recipients.
Message	The text of the invitation you are sending to recipients.
Survey Link (|LINK1|)	The link to your survey that will be included in your message text.

By default, the invitation message that is sent is a text message. However, you can include HTML formatting in your messages by selecting the check box for '**HTML formatting included in message.**'

When creating an **HTML** message, you may also customize the embedded survey link. If you place a trailing asterisk after **LINK1**, the E-mail system will not create the HTML anchor tags. You will then be able to define your own anchor tag and pass additional parameters into the survey or customize the text portion of the link in the message. The basic syntax is as follows:

```
<a href="|LINK1*|">Click Here to take my survey</a>
```

Sampling Rate: You can choose to have the campaign sent to a random sampling of your list. The sampling is expressed as a percentage and is selected from the drop-down list provided. Normally, you will select **100%** to send to the entire mailing list.

Once you create your campaign message and send it out to your mailing list recipients, the Vovici EFM Feedback application will begin to track the following information.

- **Base count:** The number of recipients in your mailing list.
- **Success count:** The number of E-mails that are successfully delivered from the E-mail server to the people in your mailing list.
- **Bounce:** The number of E-mails that were not successfully delivered to recipients.

- **Click:** The number of recipients who clicked your survey URL.
- **Submit:** The number of recipients who completed your survey.

Note!
Tracking counts may not immediately update until processing has completed. You can refresh your browser screen to see updates in counts.

You will also be able to see these **parameters**:

- **Message Subject:** The subject line you entered for the campaign.
- **Type:** The type of campaign being sent (New, Reminder, Follow Up, Thank You).
- **Start Date:** The date and time the campaign was started.
- **Completed Date:** The date and time the campaign completed.
- **Status:** If the campaign is running or has completed.

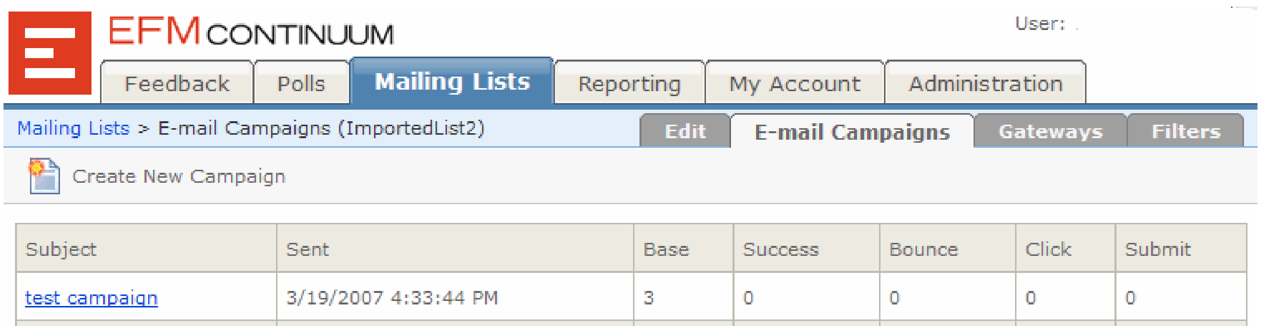
Note!
Once you send your invitation, you are instantly taken to the E-Mail Campaigns tab where this information is tracked.

Create New Campaign Overview

The **Create New Campaign** option is accessed from the **E-Mail Campaigns Tab**. To navigate to this location select the **Mailing Lists Home Page** and select a Mailing List from the **List Pane**. Now click **Manage E-Mail Campaigns** and you are placed in the **E-Mail Campaigns Tab**.

See related topics: **What is a Campaign?, Create Your Campaign Message Options**

Any campaigns that have already been created will be listed on the **E-mail Campaigns Tab** with their status and **counts**.



Campaign Status - Tracking Counts

When you create a campaign, there are four functional tabs that are utilized:

Message	Enter your message details here (From Name, From/Reply To Addresses, Associated Survey, Subject, Message Text, Sampling Rate). There is default message text displayed in the Message box that can be used as a guideline for your message entry.
Piped Fields	This tab is used for **field mapping** through which you can track respondents by a Unique ID or E-mail address. You can also populate hidden field columns in your survey results through this field mapping.
Message Filters	You can choose options here to filter your list using a filter you have defined.
Send Preview	Send a test message to the E-mail address you specify before sending the campaign to the entire mailing list.

Setting Up Your Campaign

Create Your Campaign Message Options

When you click the **Create New Campaign** button, by default you are placed on the **Message Tab**. This tab is where you enter all of the details of the e-mail invitation message to be sent to your recipients.

Fields that will be included in your message are:

From Name	The name of the person sending the campaign message.
From Address	The e-mail address of the person sending the campaign message. Click the down arrow and select the e-mail address from the list. To add e-mail addresses to this list select the "New..." link.
New...	This link is used to add additional e-mail addresses to your "From Address" drop-down list that can be used in sending out your campaign messages. • Click **New...**, enter the e-mail address you want to add, click **Next**. • A confirmation message is sent to this e-mail address which contains a link that you must click to confirm that you want to add this new e-mail address. Once Vovici receives this confirmation message back, the email address is ready for use and added to your **From Address** and **Reply To address** drop down lists. **Note: Refresh your screen to view the new addresses. Right click in the message area and select refresh.**
Reply To Address	Select the e-mail address from the drop-down list of where you want your survey responses delivered.
Associated Survey	Select the title of the survey you are inviting recipients to take. This list contains your published surveys.
Subject	Type in anything you like at this location as you would for any e-mail message. This is the "subject" of your survey e-mail message and will be displayed to your survey audience.
Message	The Message box will initially contain an example message and survey link. Click inside the box and **Replace** the example message text and survey link with your own personal message and survey link.
Survey Link (|LINK1|)	This is the link to your survey that will be included in your message text. The survey link is placed in the message by clicking **Survey Link** from the **Available Fields** box.

Sampling Rate	Normally, you will select **100%** to send your survey and message to your entire mailing list. You can also choose to have the campaign sent to a random sampling of your mailing list. The sampling is expressed as a percentage and is selected from the drop-down list provided. For example, if you select 25%, then your e-mail message and survey link will only be sent to 25% of the people on your mailing list.
Send Message	The check box for '**Schedule message to be sent in 10 minutes**' will schedule your campaign e-mail message to be sent automatically when checked. You also have the option to **schedule the campaign** to be sent using the calendar icon to specify the date and time. **Want more details?**

Note!
E-mail addresses used in 'From Address' and 'Reply To Address' must be previously confirmed. Only confirmed E-mail addresses will display in the drop-down lists.

HTML formatting included in message check box

By default, the invitation message that is sent is a text message. However, you can include HTML formatting in your messages by selecting the check box for '**HTML formatting included in message.**'

When creating an **HTML** message, you may also customize the embedded survey link. If you place a trailing asterisk after **LINK1**, the E-mail system will not create the HTML anchor tags. You will then be able to define your own anchor tag and pass additional parameters into the survey or customize the text portion of the link in the message. The basic syntax is as follows:

```
<a href="|LINK1*|">Click Here to take my survey</a>
```

See related topics: **Create New Campaign Overview**, Steps to Create a New Campaign, **Available Fields**

Steps to Create a New Campaign

To Create a New Campaign

1. Navigate to the **Mailing Lists Home Page** and select a mailing list from the **List Pane**. Click on **Manage E-Mail Campaigns** in the **Options Pane**.
2. From the **E-mail Campaigns** tab, click **Create New Campaign**.
3. On the **Message Tab**, enter values in the text boxes as specified.

> **Note!**
> **On the Message Tab all fields are required except *Associated Survey*; however, omitting this field will prevent you from properly including the survey link in your message.**

4. Type your invitation message text in the **Message** box, replacing the example text that is shown.
5. To get your survey link into your message, from the **Available Fields** box to the right, select **Insert into: Message** and click the first item - **Survey Link (|LINK1|)**. This will place '|LINK1|' in your message at the bottom. You can cut (**Ctl-x**) and paste (**Ctl-v**) to move it to the desired location in the message.
6. Choose a **Sampling Rate** from the drop-down list. In most cases, you will choose '100% (No sampling)' to ensure that the entire mailing list is included.
7. On the **Message Tab**, there is a check box for '**Schedule message to be sent in 10 minutes**' that will schedule your campaign to be sent. You can select this box to schedule your campaign, or you can **schedule the campaign** using the calendar to specify the date and time it is to be sent. See the 'Scheduling a Campaign' section below for the details.
8. On the **Piped Fields Tab**, perform your **field mapping** to associate your **survey** fields (displayed on the left) with your **mailing list** fields (displayed in the drop-down lists). It is recommended that you map **E-mail** from the mailing list to **Unique ID**. This will capture the respondent's E-mail address in your survey results. If you have hidden fields in your survey, they will be displayed below Unique ID. Match these fields with those from your mailing list as well.
9. On the **Message Filters Tab**, choose a filter status (None or a User Defined Filter).
10. Choose the appropriate status from **Include/Exclude Recipients from previous message**. Include or Exclude are used when a filter is applied.

> **Note!**
> **When Include or Exclude is chosen and a message(s) selected, 'Include' or 'Exclude' will be displayed in the Sent Message Filter column on the Campaign Messages tab as a link. When you click the link, the E-mail addresses of the recipients being included/excluded are displayed along with Date Sent, Message ID and the Message Subject.**

10. It is recommended that you send a **Preview message** to verify the accuracy of your campaign message and parameters. On the **Send Preview Tab**, enter the E-mail address of the recipient and click **Send**.
11. When options are selected, click **OK**.

Available Fields

When setting up your campaign message options, a box containing **Available Fields** is displayed to the right of the **Message** box.

Survey Link (LINK1) is the direct link to your survey. Including this link in your message is essential. The other fields are optional, but can be used to add personalized information from your mailing list into your e-mail campaign message.

Steps to include your Survey Link

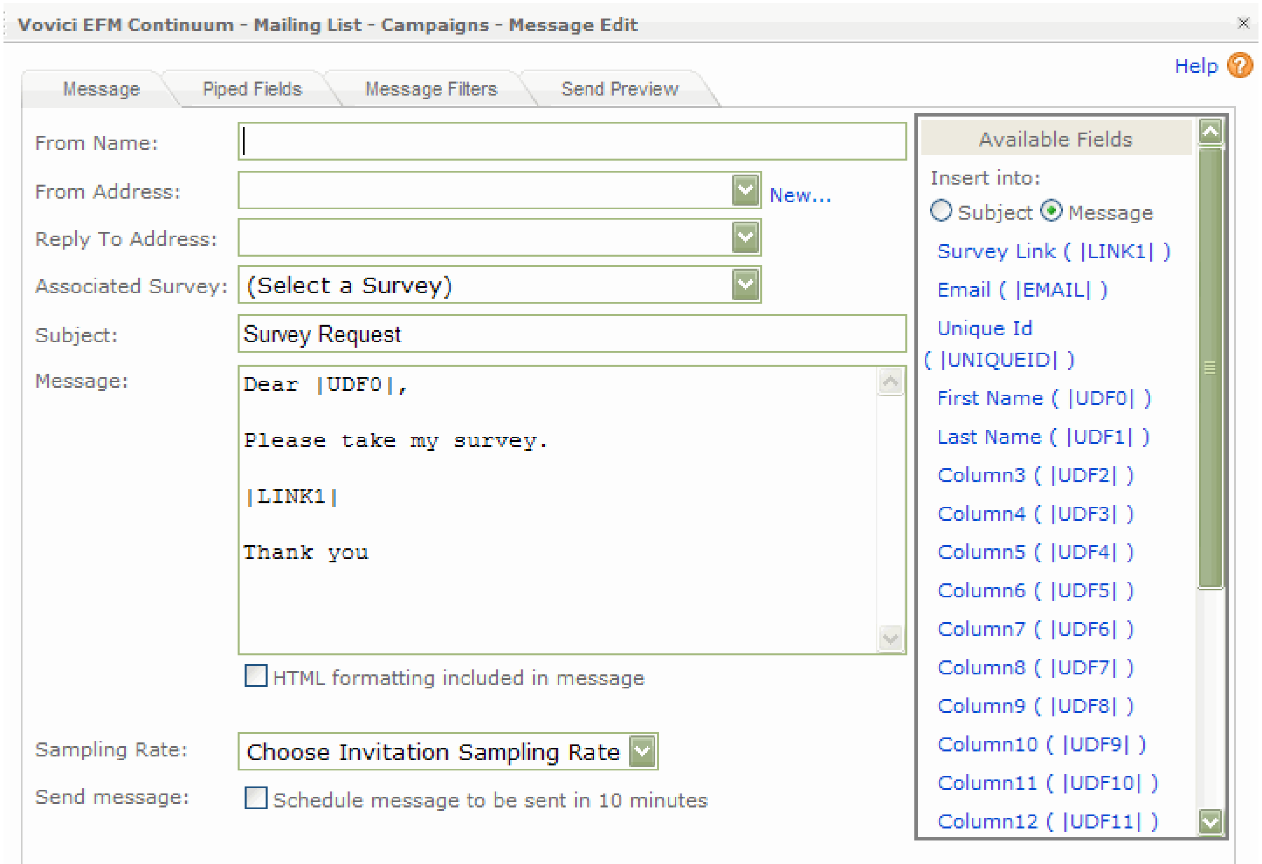
1. First remove the sample text that is included in the message area. Highlight it and hit your delete button, it is simple as that.
2. Now, click the "Survey Link (LINK1)" text in the **Available Fields** box and (LINK1) displays in your message area.

Note: This is the link to the survey that you selected from the Associated Survey drop-down list directly above the message area.
Your survey link will show in your message text as |LINK1|. This variable will be resolved by the application and displayed as an encrypted survey link when the message is sent.

How to include a personalized message using Available Fields

Now add any other text you want to the message area. Type your personal message to your survey recipients as you would any other e-mail you would send out to your clients. See the sample text in the **Example** below.

The example below shows a simple invitation message containing a UDF representing First Name (|UDF0|) and the survey link (|LINK1|).



Example Campaign Message Text with Available Fields

Any of the Available Fields can be inserted into the **Subject** line of the message or into the **message** itself by selecting the appropriate option from **Insert into:** area at the top of the Available Fields box. The most common method is to insert the fields into your **message**.

When a field is clicked from **Available Fields**, it is displayed in your message as one of the values shown in parentheses (UDF0, UDF1, etc.). In this case UDFO1 is First Name. The title of the UDF field correlates with the column header name from your Mailing List.

Alert!
Be aware that by default, User Defined Fields are inserted into your message at the bottom after any existing text.

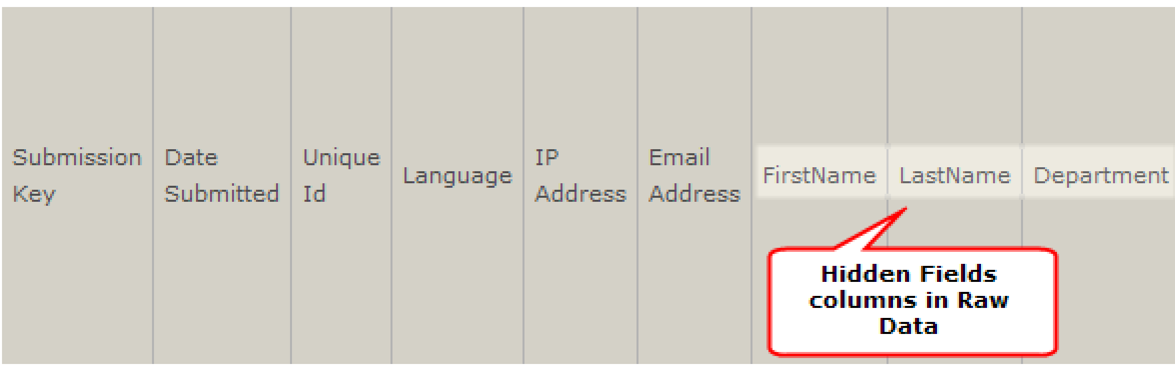
Once a User Defined Field is inserted into your message, you can use your normal cut and paste features to move the text to where you want it (Cut (**Ctl-x**) and Paste (**Ctl-v**) to place the UDF where you desire).

Associate Your Survey with a Campaign

When you **create a campaign**, you are required to choose a survey to be associated with a mailing list. This means that you are choosing what survey link you want to send out to your mailing list recipients.

In the campaign creation process, a **field mapping** process may be necessary. Field mapping is not required unless you want to **track your recipients** to know who has responded to your survey, or you are passing data values from your list that you want to see in your survey results.

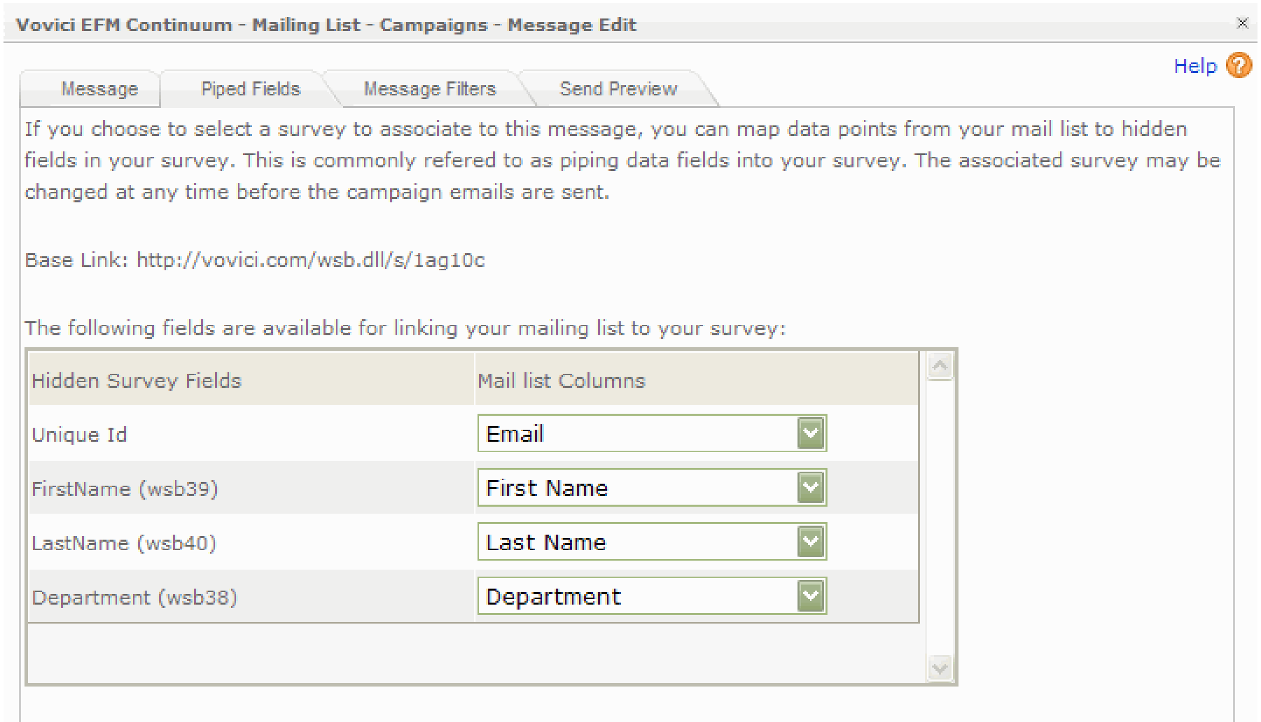
Passing data values into your survey results is done through the use of **hidden fields** in your survey so that your respondents will not be required to enter the data. Each hidden field will display as a column in your survey results.



Hidden Fields In Survey Results

Field mapping is done on the **Piped Fields Tab** that is displayed when you create your campaign. Field names will be listed on the left with drop-down lists on the right. The names on the left represent fields in your **survey** and the fields in the drop-down lists are data columns in your **mailing list**.

In the mapping step, you simply match up the appropriate fields on the left with those in the drop-down lists on the right.



Campaigns - Field Mapping with Hidden Fields

By default, there will always be a field for **Unique ID**. If you do not have a Unique ID value in your **mailing list**, it is recommended that you map **Email** to **Unique ID**. This will populate the Unique ID column in your survey results with the respondent's Email address from your mailing list and enable you to track submissions without your respondents having to enter information.

Note!
If you do not have hidden fields in your survey, Unique ID is the only field name that will display on the Piped Fields Tab. You can map any available field to Unique ID for tracking; however, mapping is not required for Unique ID.

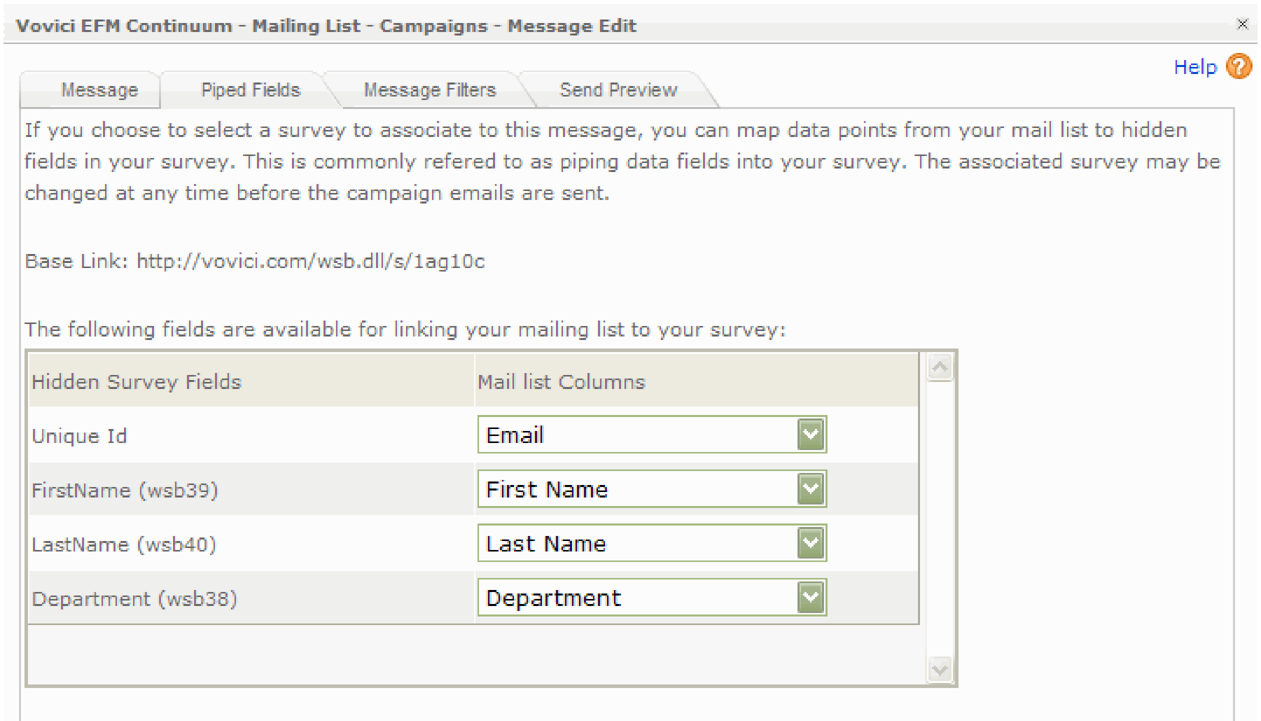
Hidden fields <u>must</u> be mapped in order for those columns to be populated in your survey results.

Example

Assume your **mailing list** has data values for **First Name**, **Last Name** and **Department** and you want to view these values for your respondents in your survey results, as well as their E-mail addresses.

1. Your published survey will need to contain hidden field questions at the top for First Name, Last Name and Department. Assume the names and ID numbers of these hidden fields are **FirstName (wsb39)**, **LastName (wsb40)** and **Department (wsb38)**.
2. On the **Piped Fields Tab**, you will see Unique ID in the left column. Directly below Unique ID, you will see **FirstName (wsb39)**, **LastName (wsb40)** and **Department (wsb38)**. The right column will have drop-down lists for each field name.

3. To collect the E-mail address of the respondent, select **Email** in the drop-down list next to **Unique ID**.
4. Map FirstName, LastName and Department to their corresponding values in the drop-down lists.
5. Click **OK**.



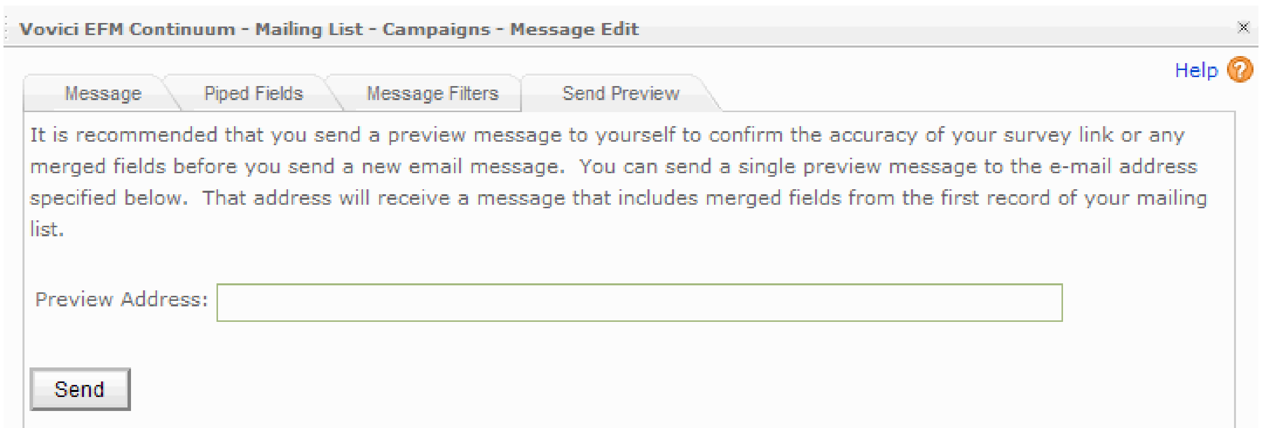
Campaigns - Field Mapping with Hidden Fields

Preview Your Campaign

When you **create a campaign**, it is recommended that you send a preview message to a specified E-mail address before sending the campaign out to the entire mailing list.

Preview messages can be sent to anyone and can be sent as often as necessary.

On the **Send Preview Tab**, enter the E-mail address of the recipient and click **Send**. In most cases, you will send the preview to yourself. The **Send Preview** option can also be accessed through an existing campaign by clicking on the **Message Subject** name to edit the campaign.



Mailing List Campaign - Send Preview

Scheduling a Campaign

After a campaign is created and all the options are specified, the campaign must be **scheduled** to send it to all the recipients in your mailing list.

See related topic: **Create New Campaign Message**

On the **Message Tab** when you Create New Campaign, there is a check box at the bottom for '**Schedule message to be sent in 10 minutes**' that will schedule your campaign to be sent. You can select this box to schedule your campaign, or you can **schedule the campaign** (see steps below) using the calendar to specify the date and time it is to be sent.

The campaign will be shown in the **Campaign List Pane** along with any other campaigns you have created. There will be status columns for:

- **Subject** - the subject line entered for your message
- **Sent** - the date and time the campaign was sent (blank if not yet scheduled)
- **Base count** - the number of recipients in your mailing list
- **Success count** - the number of Emails that are successfully delivered to recipients from the Email server
- **Bounce** - the number of Emails that were not successfully delivered to recipients
- **Click** - the number of recipients who clicked the survey URL
- **Submit** - the number of recipients who submitted the survey

To Schedule a Campaign

1. Navigate to the **Mailing Lists Home Page** and select a mailing list from the **List Pane** and select Manage E-mail Campaigns.
2. From the **E-mail Campaigns** tab click on the Subject of your campaign from the **List Pane** and the campaign message dialog will display.
3. Click the **Calendar** icon in the far right column.
4. You can type in the date/time in the text box to schedule the campaign, or use the **Calendar/Clock** icons to select a date and one of the predetermined times from the list displayed. Times in this list are specified in 30 minute increments.
5. Click **OK**.
6. You will be returned to the **Campaign Messages Tab** which now displays updated statuses in the columns. The scheduled date/time is now displayed in the **Start Date** column. There is also a **Stop** icon in the far right column that can be used to cancel or stop a campaign if necessary.
7. When the scheduled time is reached, the campaign will begin running automatically.

Campaign Messages Tab

This tab displays the status of your campaign. Fields displayed are:

- **Basic Message Statistics** - counts that provide status on E-mail delivery and survey access (see descriptions above).
- **Survey link** - the URL of your survey
- **Message Subject** - the subject entered for your message
- **Type** - the type of campaign
- **Start Date** - the date and time the campaign will be sent

- **Completed Date** - the date and time the campaign completed processing
- **Status** - current status of the campaign (Unscheduled, Running, Completed)
- **Calendar** - use this icon to specify the date and time the campaign is to be sent

Message Recipient List Tab

This tab shows a status summary of your campaign recipients and displays information for each one in the fields described below:

- **Email** - Email address of the recipient
- **Sent** - whether or not the invitation was sent to that recipient
- **Clicked** - whether or not the recipient clicked the survey link
- **Submitted** - whether or not the recipient submitted the survey
- **Bounced** - whether or not the invitation to that particular Email addressed was not delivered
- **Error** - error code and text description if an error occurred during the delivery attempt

Sending Reminder, Follow-Up, Thank You Jobs

In addition to sending your initial campaign, you can send **Reminder**, **Follow Up**, or **Thank You** campaigns.

Reminder campaigns are only sent to the people that received your invitation but **did not actually submit the survey** you referenced in your message.

Thank You campaigns are sent only to the people on your mailing list that **did actually submit** the survey.

Follow Up campaigns are sent to **every person on your mailing list** that received the mailing, regardless of whether or not they actually took the survey.

See related topic: **Creating a Campaign**

Steps

1. From the **Mailing Lists Home Page**, select the name of your original mailing list then select **Manage E-mail Campaigns**.
2. Click on the Subject of the original campaign from the List Pane.
3. Click **New Message**.
4. Select the type of campaign you want to send.
5. Click **OK**.
6. When you select one of the campaign options above, you are directed to the **Message Tab**. The fields for **From Name**, **From Address**, **Reply To Address** and **Associated Survey** are prepopulated based on the **original campaign**.
7. Enter a **Subject** line for the campaign.
8. Enter your **Message** text.
9. The **Piped Fields** tab will not display drop-down menus for field mapping as the settings for the **original campaign** will carry over.
10. On the **Message Filters Tab**, you can select the check box to **Exclude messages to addresses that bounced**.
11. Click **OK**.
12. The new campaign will now display on the **Campaign Messages Tab** and the **Type** column will reflect the campaign type (Reminder, Follow Up, Thank You).
13. Schedule and send the campaign as normal.

See related topic: **Scheduling a Campaign**

Chapter Ten

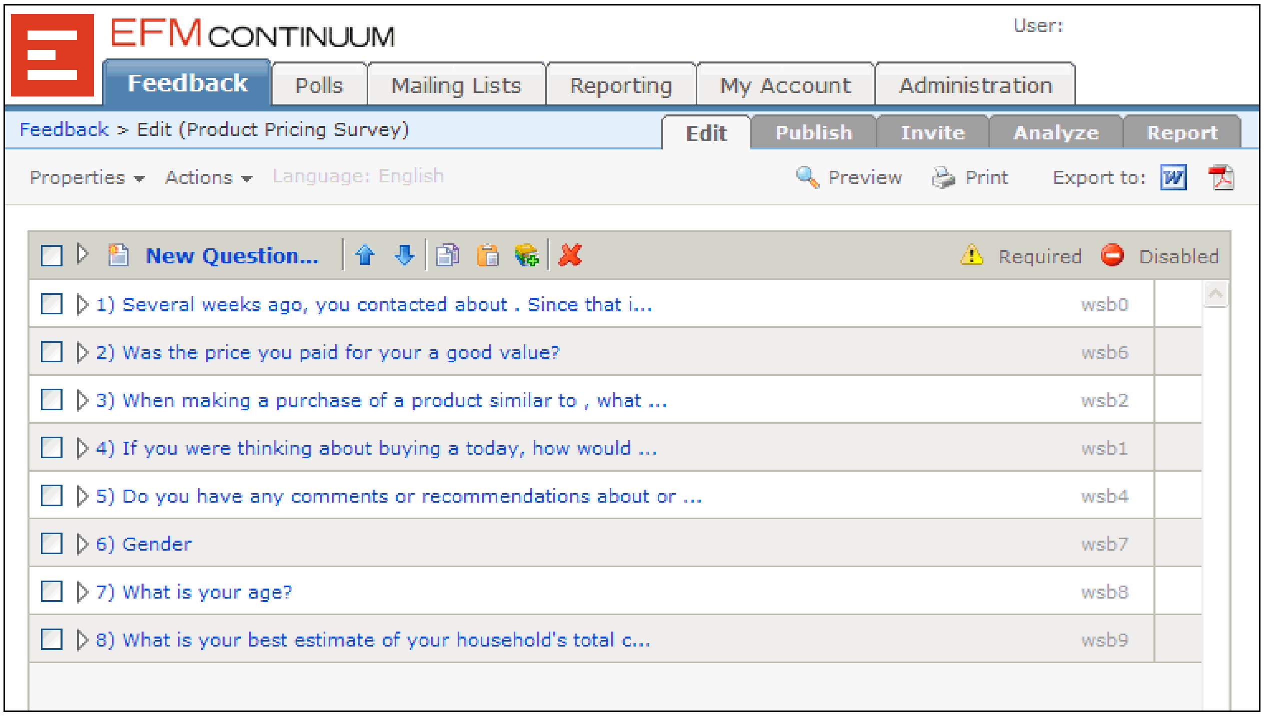
Survey Management

Discussed in this Chapter

Survey Management

Managing the Question List

The **Question List Pane** is the area where you add, edit, or manipulate your survey questions. The primary controls for managing the **questions** in your survey appear in the **Question List Tool Bar**.



Question List Pane

The survey questions are initially displayed in the order in which they were created in the **Question List Pane**. Information such as the **survey name** and the **language** used for this survey are also displayed.

Icons/buttons contained in the **Question List Tool Bar** are shown in the table below.

	Select All Questions		Paste
New Question...	Add New Question		Add To Library
	Move Up		Delete
	Move Down	Required	Required
	Copy	Disabled	Disabled

Question List Tool Bar Icons

The questions can be selected for certain actions by using the **check box** to the left of the question number. There is also an **expansion arrow** next to this check box that will allow you to compress the question form and see only the question text, or expand it to see the question type and response options.

Edit a Question

Click the question text to be placed in the **Question List Edit Pane**. Question options and formatting can be set within this pane.

Delete a Question

Select the check box next to the question then click the Delete icon on the **Question List Tool Bar**. The Delete confirmation dialog will display.

Move a Question

Select the check box next to the question, then move up or down using the Arrow icons on the Question List Tool Bar.

Copy a Question

Select the check box next to the question then click the Copy icon on the **Question List Tool Bar**.

To paste the copied question in another location, click the check box next to the question where you want to paste your entry, and then click the Paste icon (clipboard) on the tool bar. The copied question will be pasted **after** the selected question.

Add To Question Library

Select the check box next to the question you want to add to your **Question Library**, and then click the **Add To Library** icon (book) on the **List Tool Bar**.

Require / Disable A Question

There is a column at the far right of the list indicating whether a question is **Required** or **Disabled**. An example is shown below.

Required / Disabled Questions Respectively

Note!
Icons only display in this column if you have a question set to Required or Disabled. To clear these actions, select the question then click the Required or Disabled button in the Question List Tool Bar.

Internal IDs

Each question and response option in your survey has a unique **wsb number** (Internal ID). This value appears to the right of the question and will show as **'wsbXX'** where **'XX'** is a number assigned by the application. These ID values are used to uniquely identify and help map data to the proper question/response in your survey.

Multi-Language Surveys

You can create your survey in multiple languages and make it available to an audience of international respondents. In order to begin the process of setting up a multi-language survey, click the **Languages & Messages** option in the **Properties** drop-down menu when you select **Edit Survey**.

A set of related tabs will now be available that pertain to various functions and messages that are normally included in your survey. The tabs are:

Languages Tab Bar

Add New Language

By default your surveys will be single language surveys. A default language of English (with the **Culture Code** of "eng" and **Description** of "English") is created. If you would like your survey to be available to display in other languages, the appropriate information for each additional language must be input through the Add New Language tab.

Note!
Translation of the survey text and labels is done by the survey author. There is no automatic translation tool at this time.

Message Translation

These are messages and text used for buttons and question options that are commonly displayed in your survey. You can access these messages and edit them through the **Message Translation** tab. In a multi-language survey, these boxes will be blank and you will need to enter the translated text for those items that you will be using in your survey. The most commonly used items are the **Next Page**, **Previous Page**, and **Submit** buttons. If your survey does not utilize a particular button or message, you do not have to translate it.

Validation Messages

These messages pertain to various question types and their settings. You can access these messages and edit them through the **Validation Messages** tab. They are displayed in a popup alert format and will be shown if a respondent's answer to a specific question does not meet the specified criteria of the question.

Resume Request

The **Resume Request** tab contains the basic code for the default page that displays when a survey with **persistence** enabled has been only partially completed. If the respondent does not complete the survey in one sitting, then clicks on the link to return to the survey to complete it, this page will display. The text of the links and their descriptions can be altered, however, the links cannot be removed.

Language Request

This tab provides the interface to edit the standard **Language Request** page that displays for a multi-language survey. A text box is provided if you wish to customize the page display by coding your own HTML. An example template will display in the text box when you click **Insert Template**. This example code can be used as a guideline when customizing this page.

Persistence in Surveys

Persistence in surveys is a feature whereby respondents can exit the survey at predefined points and return to it later, picking up on the page where they left off.

Persistence becomes 'active' when a page break is inserted between two questions in your survey. Once the respondent clicks Next Page, their responses up to that point are stored. **Persistence** is enabled by default, but can be disabled by selecting the check box to **'Disable persistence for this survey'** under **Presentation** on the **General** tab.

When the respondent clicks on the survey link again, the **Resume Request Page** is displayed with the following options:

Resume
Resume an existing survey submission at the last unanswered question.

Resume From First Page
Resume an existing survey submission at the first page with the ability to review existing
answers.

Delete
Delete your existing survey submission.

This option deletes answers you have entered previously. You will be presented with the message **'You have no uncompleted surveys.'** You will have to exit out of this window and take the survey from the beginning.

Tip!
Adding page breaks after every screen full of questions is a great way to make your survey more usable.

Previewing Your Survey

You can **preview** your survey easily to see exactly how it will appear to your respondents when it is published. It is a great way to review your layout and to test functionality such as **conditional page breaks**.

To preview your survey, you must be in the Edit Survey option and have a survey open to the Question List. Click the **Preview** button above the Question List.

Your survey will be displayed as a respondent would see it, and you can navigate through it, answering questions just as a respondent would.

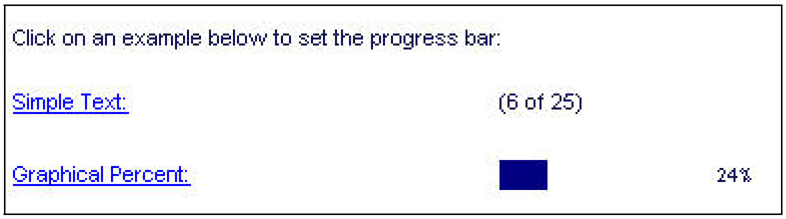
Note!
Answers to questions and submitting the survey from Preview do not post real results to the survey.

Tip!
If your survey has required questions or numeric defined questions, you can check the box to Suppress Validation. This will allow you to navigate through your survey without being required to answer the questions.

Progress Bar

You can include a **progress bar** in your survey. The progress bar gives the respondent a real-time status of their progress through your survey. The Progress Bar selection is located under **Presentation/General Tab** on the **Properties** drop-down menu.

You can select the style of the Progress Bar to be used. Currently, there are two styles to choose from: **Simple Text** and **Graphical Percent**.



The **Simple Text** progress bar is a page number version that will show the current page the respondent is on out of the total number of pages in the survey.

The **Graphical Percent** progress bar is a percentage bar graph version that will show what percent of the survey has been completed.

Clicking on either of the styles listed in the Progress Bar editor will update the Progress Bar HTML field to contain the necessary HTML for the progress bar selected. Once you've selected a style, click the **OK** button to save the changes to your survey.

Steps

1. Click on **Presentation** under **Properties.**
2. Select the check box to **'Include progress bar.'**
3. Click on '**Customize the progress bar'** to select which progress bar to use.
4. Click **OK** to verify the selection.
5. Click **OK** to return to the Question List.

Note!
The default progress bar is the Simple Text (page number) version.

Note!
If you have a customized Display Template, make sure you have the code included that inserts a progress bar into the survey. Please be sure to insert the code for the Progress Bar below the code for the submit button. These codes must be enclosed within the <FORM> tags in your survey template.

For example:

```
<!--WSBSUBMITBUTTON--><br>
<!--WSBPROGRESSBAR-->
```

This tag must be included in your display template for the progress bar to render in your survey.

Secure Surveys and SSL

You can publish your surveys with **SSL** enabled to provide an extra level of data security.

To publish your survey using **SSL**, select the check box to '**Ensure survey is accessible through SSL**' on the **Publish Tab**, then click the **Publish** button.

What is SSL?

SSL is an acronym for Secure Sockets Layer. SSL is a network protocol that encrypts data between the server (the Vovici Hosting Service) and the client application (a respondent's browser). Since the Internet is a public network with many routing points, most data flows through a number of computers and can potentially be viewed by technical people with the right hardware and software. SSL uses public and private key encryption techniques as well as certificates to determine that the server is who they claim to be. Most browsers support SSL as a means of encrypting data; most Web-based purchases are handled through SSL connections.

Why should I use SSL?

By securing your survey and connection to the Vovici hosting service, your respondents can feel confident that the data they provide will only be viewable by you and not someone else on the Internet. While the raw data that Vovici transfers is almost completely unreadable outside of the Vovici application, the data streams may contain names, E-mail addresses and phone numbers that someone could view.

You can use SSL for two purposes:

1. Securing the connection between the Vovici application and the Vovici server.
2. Enabling data transferred from surveys to the server to be secured.

Securing the connection between the Vovici application and Vovici.COM

The Vovici application communicates with the Vovici.COM servers for the following purposes:

- Checking account information
- Publishing surveys
- Managing Account Information
- Retrieving the Survey Results

In order to secure each of these points of communication through SSL the server that hosts the Vovici application will need to have an SSL certificate installed for that Web site. If you are using the Vovici Hosting Service, rather than hosting the Vovici application on your own server, then all you will need to do to secure communication between the Vovici application and the server is to modify the URL of the application to include "**https://**" rather than "**http://**".

During the survey publishing process, all image references within the survey will be converted to relative paths, meaning the images from your display template will reference the image directory on Vovici.COM.

Note!
This may cause problems if you are referencing images from somewhere other than the Vovici.COM servers. If this is the case, your users may get a message that indicates the survey contains both secure and non-secure items. If so, to clear out these notices, you have to make all references the same - either 'http' or 'https' which may mean just resaving your images.

Once a survey is flagged as secure it can be accessed either through SSL or standard HTTP. As an example, if you normally access a survey through the following:

http://*SurveyURL*

You can now reference it as:

https://*SurveyURL*

Note that the only difference between the two links is the **HTTPS** reference at the **HTTP** portion of the survey URL. If you have a respondent that has problems accessing your survey through **SSL/HTTPS**, they can still access the survey through the **HTTP** version.

Delete a Survey

To navigate to this option, click the **Feedback** tab and select the survey to be deleted from the **List Pane**.

Deleting a survey requires a three-step confirmation process. You will be presented with options to delete as appropriate for the particular survey selected:

- Delete the survey and all of its responses
- Delete the working copy of the survey
- Delete both the survey and the working copy of the survey

Note!
When you edit a survey, you are in the working copy and edits do not become permanent until the survey is published / republished.

Steps

1. Navigate to the **Feedback Home Page**.
2. Select the survey to be deleted from the **List Pane**.
3. Click the **Delete** button in the List Tool Bar.
4. Select the appropriate delete method by clicking the radio button next to it.
5. Type the word 'Delete' in the text box exactly as shown (no quotes necessary).
6. Click the **Delete Now** button.

Chapter Eleven

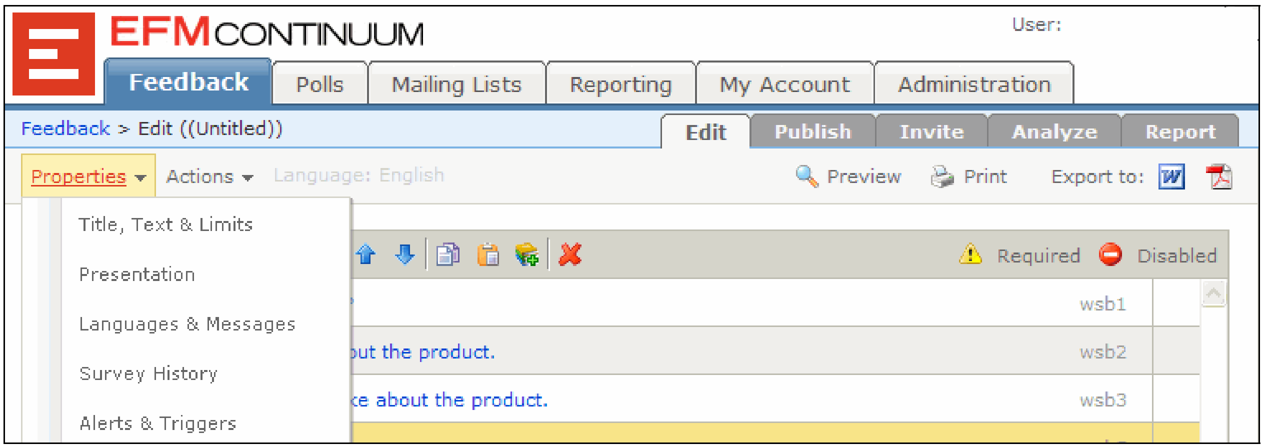
Survey Editing Properties

Survey Editing Properties

Properties Overview

The **Properties** drop-down menu is located on the **Question List Pane** and is available once you create your survey and select **Edit Survey**. It includes the following options:

- **Title, Text, & Limits**
- **Presentation**
- **Languages & Messages**
- **Survey History**
- **Alerts & Triggers**



Properties Drop-down Menu

Survey History

The **Survey History** option is located under the **Properties** drop-down menu when you select **Edit Survey**.

The **Survey History** dialog displays a list of actions that have been taken against the selected survey. It is primarily used as a diagnostic tool to help determine what has happened to a survey in the event a problem occurs.

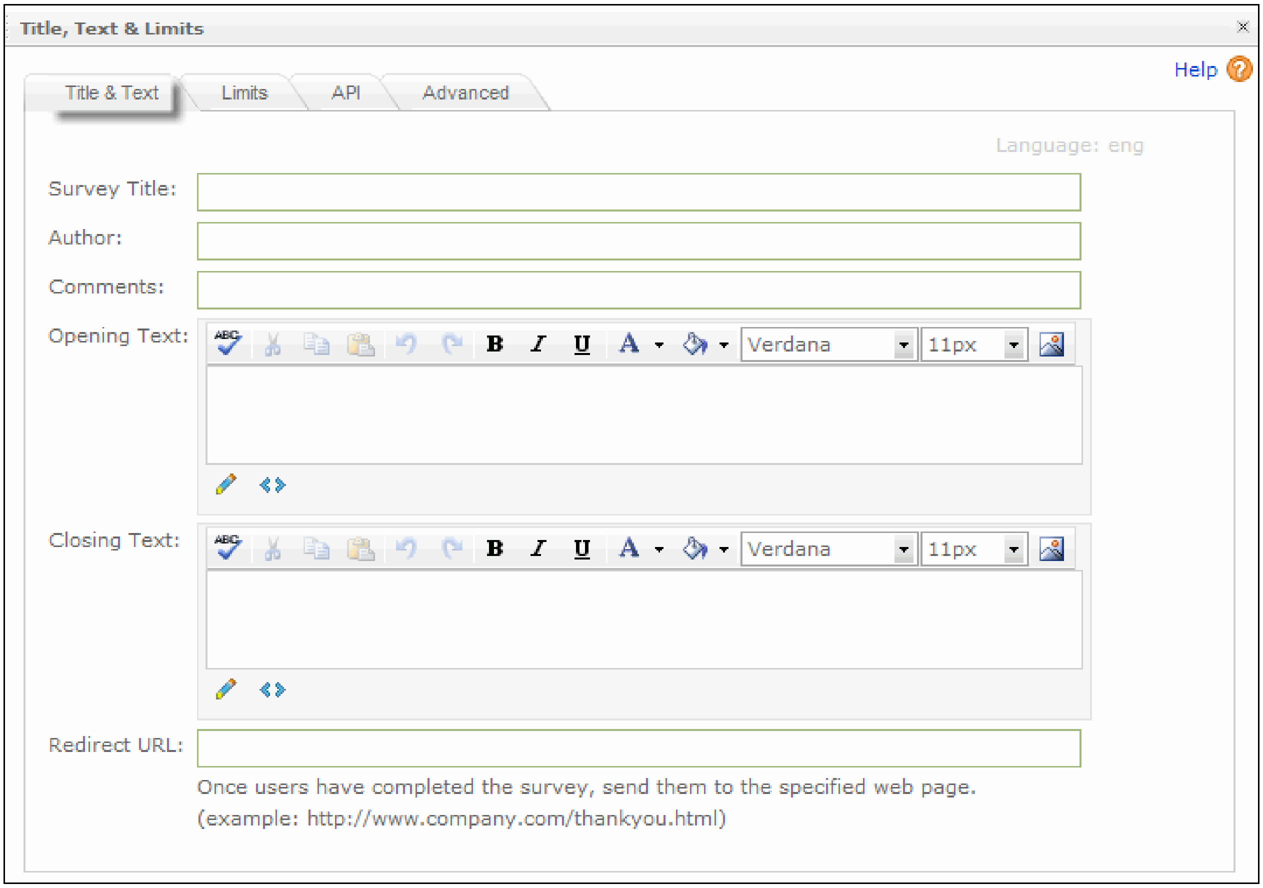
The information contained in the **Survey History** is organized by date and time. Information presented includes when the survey was created, updating or resetting of results, publishing or republishing the survey and whether or not results were kept or purged.

Note!
The only action that can be taken in this option is to Clear History. However, it is recommended that you do not clear history unless the survey is a test survey.

Title Text & Limits

Title & Text Tab

The **Title & Text** tab is located under the **Title, Text & Limits** option, and can be accessed under the **Properties** drop-down menu when you select **Edit Survey**.



Title & Text Tab

This tab contains basic information for your survey such as:

- **Survey Title:** Enter the title of your survey here. The title will appear at the top of each survey page and is inserted through the display template using the <!--WSBTITLE--> tag.
- **Author:** You can enter a name for survey author. The name of the author is embedded into the survey HTM file and becomes a field that can be displayed on any reports that you generate. The author name is inserted into your report using the <!--WSBSURVEYAUTHOR--> tag in the report template.
- **Comments:** You can add comments about the survey.
- **Opening Text:** This is introductory text that will be included at the beginning of your survey. It is generally used to introduce the purpose of the survey to your respondents, and offer other explanatory text or requirements as necessary. This field supports HTML coding.

- **Closing Text:** This text is displayed at the end of the survey before the **Submit** button and is generally used to thank respondents for taking the survey. This field supports HTML coding.
- **Redirect URL:** If you would like survey respondents to go to a specific web page after they submit their responses, enter the complete URL (**including http://**) into this space.

Warning!
If the address you enter into this field is not valid, your survey respondents will receive a "Page cannot be displayed" error.

Although respondents receive this error, their responses ARE collected. The error refers to the redirect page. To correct an invalid redirect URL, you will need to enter the correct version of the URL, and then republish your survey.

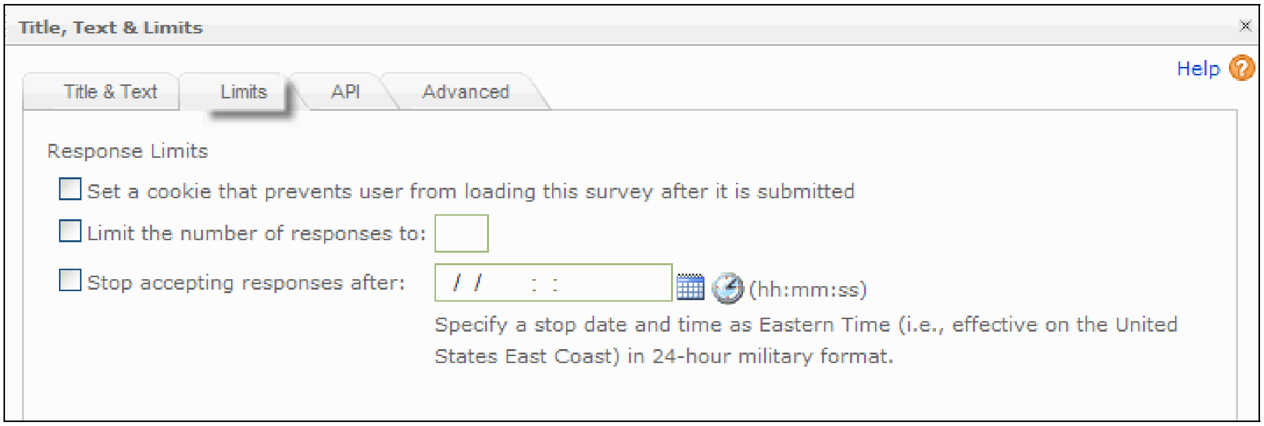
Note!
Changes made to any of these fields need to be applied by clicking OK and the survey republished to become permanent.

Other tab options from this dialog box include **Limits**, **API** and **Advanced**.

- **Limits:** Security settings that can be applied to your survey.
- **API:** You can set up a call to a web service so that function calls can be made utilizing our API feature.
- **Advanced:** This area is used to enter codes provided by our technical support team for advanced features or for testing purposes. Please contact our technical support team for assistance.

Limits Tab (Security Settings)

The **Limits** tab is located under the **Title, Text, & Limits** option, and can be accessed under the **Properties** drop-down menu when you select **Edit Survey**. The **Limits** tab contains options for **Response Limits** that can be enabled to control access to your survey.



Limits Tab

Response Limits

Under **Response Limits** the following options are available:

Set a cookie that prevents user from loading this survey after it is submitted
Setting this option will place a cookie on the workstation of the person taking the survey. If they attempt to load the same survey again a message will display indicating that the survey has already been submitted from that workstation.

Note!
This option can be overridden if a survey respondent has disabled the cookies feature on their web browser.

Limit the number of responses to
This allows you to limit the total number of responses a survey will receive. Once that threshold has been reached the survey will be deactivated and any attempts by respondents to take the survey will result in a warning that the survey has received the required number of responses.

Stop accepting responses after
You can set a date and time that the survey will stop accepting responses. You can use the calendar and time picker provided to set your parameters, or you can enter the values. If you enter the date/time yourself, specify a stop date and time as Eastern Time (i.e., effective on the United States East Coast) in 24-hour military format.

API Call-back Usage

The Vovici Server API can call a Web service on an initial survey request and/or after a final survey submission. In addition to having the survey submission data available to an application immediately, both of these call-backs also give an external application the ability to modify or input data into the survey submission either **before the first page is rendered** or **after the last page is submitted**.

To enable either call-back, you must **implement a Web service**. Any language offering Web services support should be acceptable.

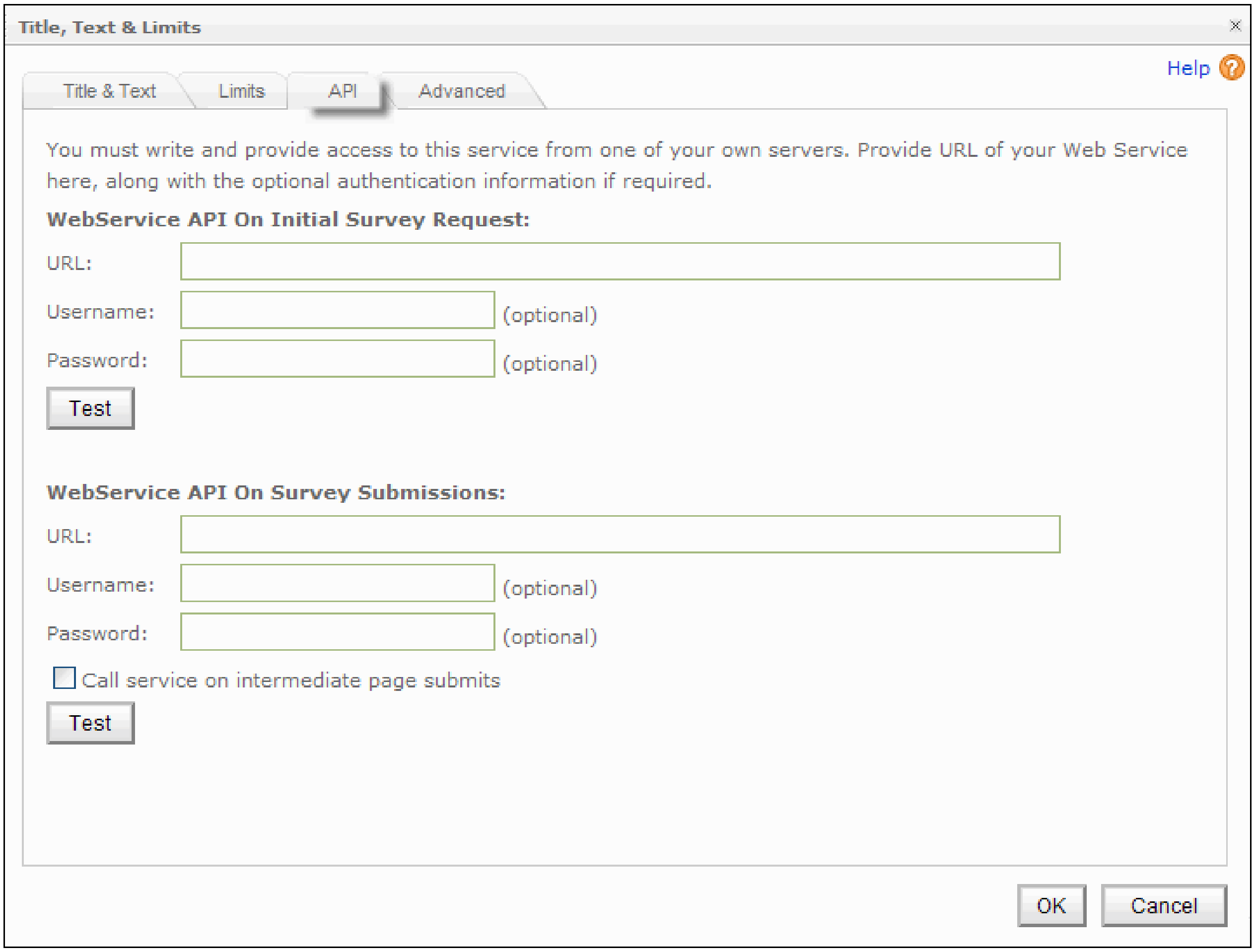
Note!
When implementing a Web service for Vovici Server in MS .NET, you must use the namespace "http://desktop.websurveyor.net/WSWebTopSvc". The service filename can be named anything you want, but the namespace must be defined as stated above. If it is not, the Web service will not be able to find the appropriate interface function calls. This may not be required in other environments.

Required Web Service Interfaces

Specific Web service interfaces that would need to be included for this would be a survey request, and a survey submission interface.

The survey request is called **BEFORE** the first page of the survey is presented to the respondent. Upon the **initial survey request**, Vovici will call this Web service if defined, providing any submission data passed into the survey and the Web service can optionally return data to prepopulate the survey submission.

The survey submission is called **AFTER** the final page of the survey is submitted by the respondent. After the **final survey submission**, Vovici can call a Web service and provide all of the available survey submission data. Although the submission data can be modified, there is no interaction with the respondent. This call-back is processed after the survey Thank You page is rendered to the respondent.



API Callback Tab

Presentation

Presentation Overview

The **Presentation** option is located on the **Properties** drop-down menu and is available once you create your survey and select **Edit Survey**. It includes the following tabs:

- **General**
- **Display Template**
- **Logo**

General Tab

This tab contains general display options to control the look of your survey. The default font is specified for the overall survey text.

Other options are:

- **Suppress question numbers**
- **Bold question text**
- **Insert 'Select One' into first item of pull-down lists**
- **Disable persistence for this survey**
- **Include progress bar**

Display Template Tab

Select a display template for your survey from the **Display template** drop-down list. A preview of each template is provided in the **Display Template Preview** window. You can also customize a display template by clicking on **'Customize the Display Template'** and editing the HTML code. Custom templates can be saved for future use.

Logo Tab

You can insert a logo at the top of your survey by selecting the logo from the **Company Logo** drop-down list. You can control the placement of the logo in your survey by using the **Alignment** drop-down list. Logos are aligned to the **left** by default if no selection is made from this list.

When a logo is selected, a preview of the logo is shown below the drop-down lists.

See related topic: **Insert/Upload a Logo**

General Display Options

The **General** tab contains several options that help control the overall look and feel of your survey and how it will appear to your survey respondents.

Default Font Tag. This is the default font used for your survey text.

Suppress question numbers. This option prevents the question numbers from displaying in your survey.

Bold question text. This selection makes your question text bold.

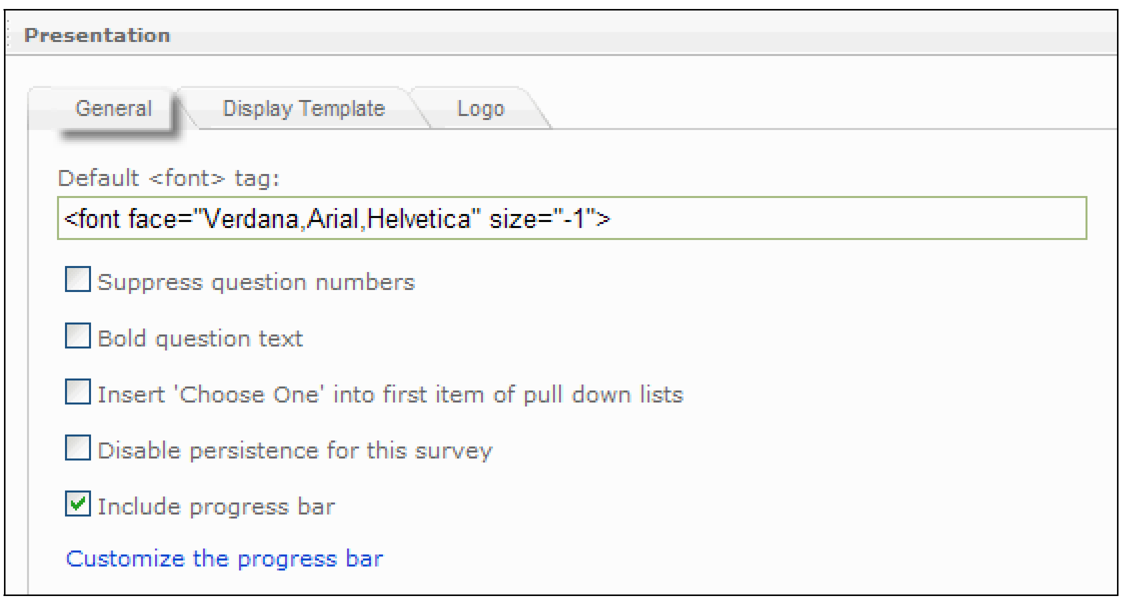
Insert 'Select One' into first item of pull down lists. This option will display 'Select One' as the default text that appears in all drop-down lists.

Disable persistence for this survey. This option turns off the persistence feature.

Warning!
If persistence is disabled, answers will not be kept if a respondent does not complete the survey in one sitting.

Include progress bar. A progress bar is added at the bottom of each survey page showing the respondent how much of the survey has been completed. You can select one of two styles for your progress bar display by clicking **'Customize the progress bar.'**

Click **OK** when selections are completed.



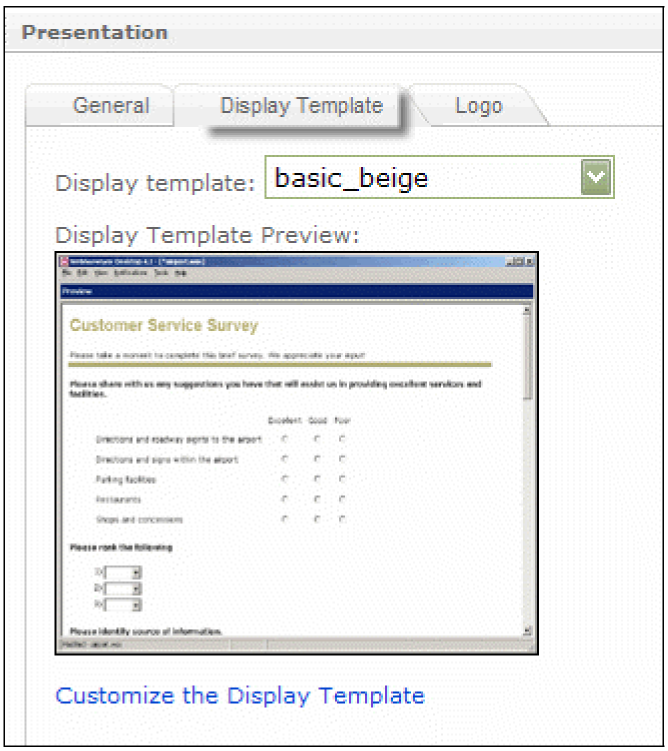
General Display Options

Display Template Tab

Publishing a survey requires you to select a display template. The display template helps determine the way your survey will appear to the user. Templates are selected through the **Presentation** option, which is located in the drop-down menu under **Properties** when you edit your survey.

Steps

1. Select the Display Template tab.
2. The **Display template** drop-down list contains all the predefined display templates available. When a template is selected, a sample version of that template is displayed in the **Display Template Preview** window.
3. Click **OK**.



Presentation - Display Template Tab

Note!
You can customize a display template and save it for future use by selecting the 'Customize the Display Template' link directly under the Display Template Preview window.

Customize the Display Template

To customize your display template, click **Customize the Display Template** under the **Display Template Preview** window and you are placed in an editor where you can work with the HTML code to manipulate the display.

Warning!
Manually modifying a display template requires that you have a good understanding of HTML.

You can **save your customized template** to be used again if you wish. Once editing is completed, you can click on the **Custom Templates** drop-down menu at the upper right corner of the editor. Click on **Save Template**, provide a name in the text box when prompted, then click **OK**. The name of your display template in the **Display template** drop-down menu will now read **'Custom.'**

Your saved template is now available under the **Customize your display template** option. Click this link, then click the **Custom Templates** button and select your saved template from the list. Click **OK** at the bottom. When you **Preview** your survey, it will show with the customized template.

Standard Fields

The following fields (inserted as HTML comments) are placed in a display template. These fields will be replaced by the application with the appropriate items when the survey HTM file is generated.

Warning!
Do not remove <u>any</u> of the fields listed below which are <u>Required</u>. Doing so will generate numerous errors in the application, and will likely prevent you from being able to collect and analyze survey data.

HTML TAG	HTML TAG STATUS	HTML TAG FUNCTION
<!--WSBTEMPLATELOGO-->	Optional	Placement of the Company Logo in your survey when defined in Presentation.
<!--WSBTITLE-->	Optional	Inserts the Title of your survey.
<!--WSBFORMACTION-->	**Required**	Where the survey will be published to - <form method="post" action="<!--WSBFORMACTION-->">
<!--WSBINTRO-->	Optional	Inserts the Introduction to Survey Respondents.
<!--WSBQUESTIONS-->	**Required**	Inserts the items from the Question List.
<!--WSBCLOSE-->	Optional	Inserts the Closing Comments to respondents.
<!--WSBEMAILADDRESS-->	**Required**	Enables the E-mail Security feature.
<!--WSBSUBMITBUTTON-->	**Required**	Inserts the Submit Button.
<!--WSBPREVIOUSBUTTON-->	**Required**	Inserts the Previous Button for multiple page surveys.
<!--WSBPROGRESSBAR-->	Optional	This is where the progress bar will be rendered when included in the presentation.
<!--WSBPAGENUMBER-->	Optional	Inserts the current page number for multiple page surveys.
<!--WSBTOTALPAGES-->	Optional	Inserts the total number of pages for multiple page surveys.
<!--WSBPERCENTCOMPLETE-->	Optional	Inserts the percentage complete for multiple page surveys.
<!--WSBPERCENTTOGO-->	Optional	Inserts the percentage left for multiple page surveys.

Insert/Upload a Logo

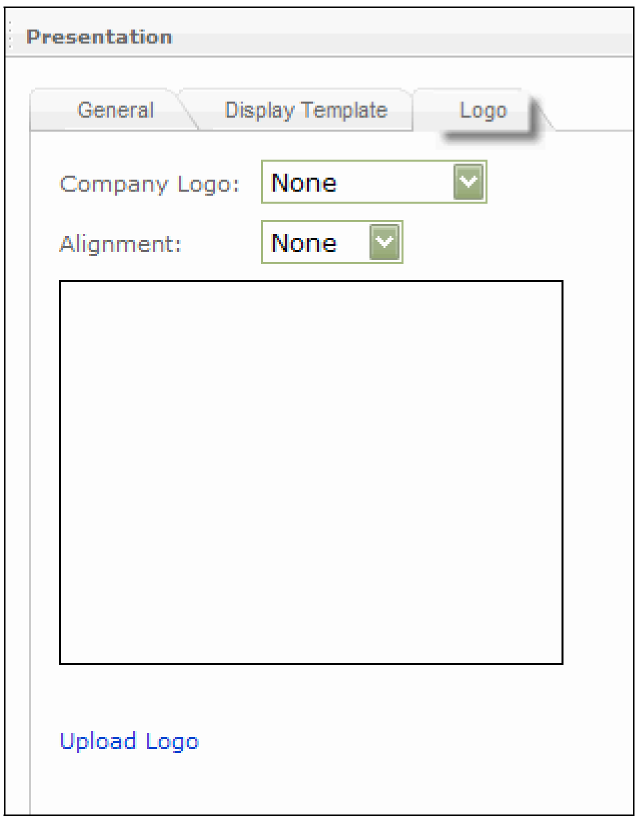
You can insert a logo into your survey that will display at the top of each survey page. To utilize this feature, the logo first needs to be uploaded into your account.

If the logo is already in your account, you select it from the **Company Logo** drop-down menu as shown.

You can control placement of the logo in the survey by using the **Alignment** drop-down menu. Available options are None, Left, Center and Right. If **Alignment** is set to None, the logo will display in the upper **left** corner of each survey page.

Once selected, the logo will display in the preview window.
Click **OK**.

The logo is inserted into the survey through the <!--WSBTEMPLATELOGO--> tag in the survey display template. The tag is already positioned properly in the template code.



Insert/Upload A Logo

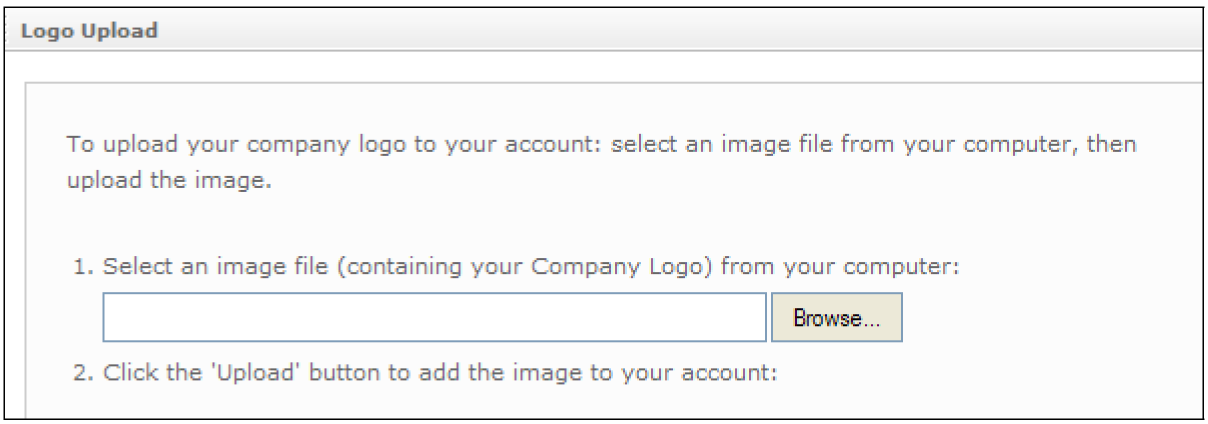
Tip!
We recommend using a small image as your company logo to preserve the layout of your display template.

If you select a logo from the Company Logo dropdown, a preview will display below the 'Alignment' drop-down menu. You can right-click on it, select Properties and find the size of the image in pixels.

Uploading a Logo

Use this option to upload a logo into your account.

1. Click **Upload Logo** from the **Logo** tab (see above).
2. Click **Browse...** to navigate to the image file you want to upload.
3. Click on the image filename, then click **Open** to populate the upload text box.
4. Click **Upload** button.



Logo Upload

Languages

Add New Language

If you have a multi-language survey, you will need to add a Culture Code for each additional language so that your survey will properly display. There are also tabs available on this screen for **Message Translation**, **Validation Messages**, **Resume Request**, and **Language Request**.

Add New Language Tab

This tab allows you to choose a Culture Code that is already available within the application, or to add one of your own by clicking **Add Language** if the desired language is not already defined.

When you add a new language, the following attributes are used:

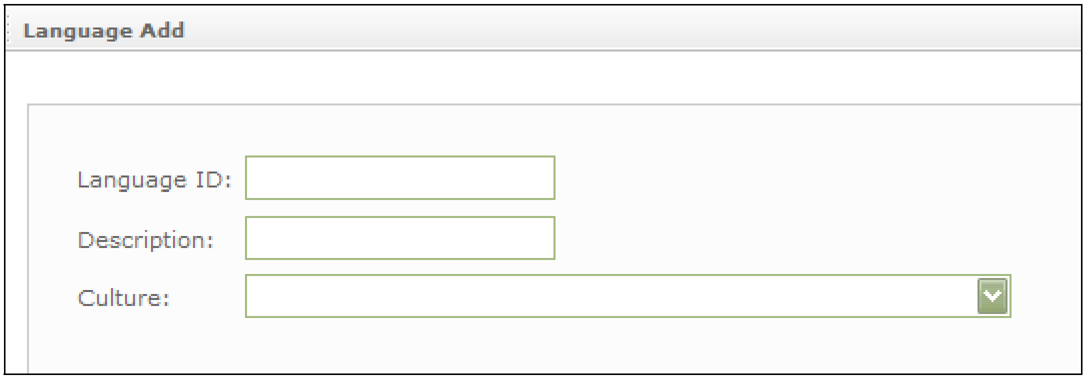
Language ID
This is the ID that will appear on addresses if you want to send users to a specific language page. This should be a short text only word without spaces or punctuation. For example: eng, fre, span, etc.

Description
The Description is the version of the text that appears in the menu for your users. The Description is usually the name of the language. For example: English, French, Spanish, etc.

Culture
This is the encoding for the language you specify. The Culture Code defines how the characters in your survey will render in a Web browser. Each language has a specific Culture Code associated with it.

To add a new Language/Culture Code

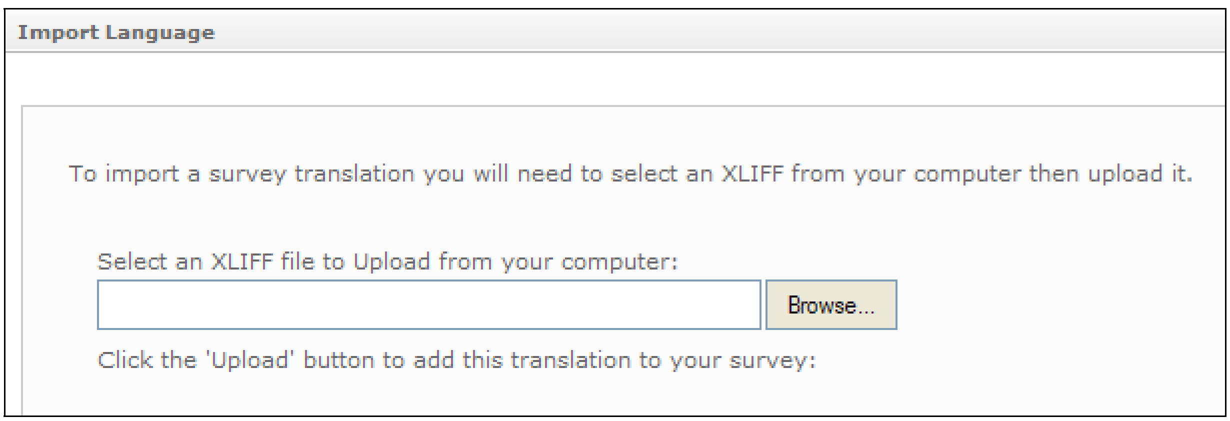
1. Under the **Properties** drop-down menu, select **Languages & Messages**.
2. Select the **Add New Language** tab.
3. Click the **Add Language** button and the Add New Language dialog is displayed.
4. Enter the Language ID (eng, fre, span, etc.).
5. Enter the language Description (English, French, Spanish, etc.).
6. Enter the **Culture Code** designation from the drop-down menu.
7. Click **OK**.



Add New Language

Import

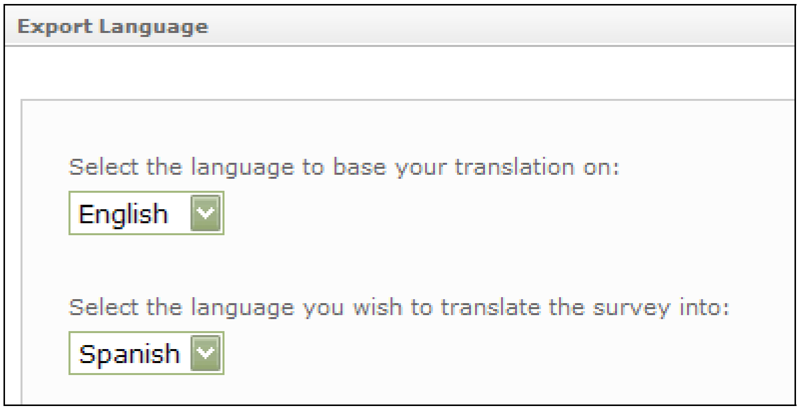
You can use the **Import** option to import previously translated text. The file required is an XLIFF (XML Localization Interchange File Format). XLIFF is an XML-based standard format that is used for exchanging localization data.



Import Language

Export

You can use the **Export** option to export a survey to be translated. You will select the language to base the translation on and the language you wish to translate the survey to. The file produced is an XLIFF file.



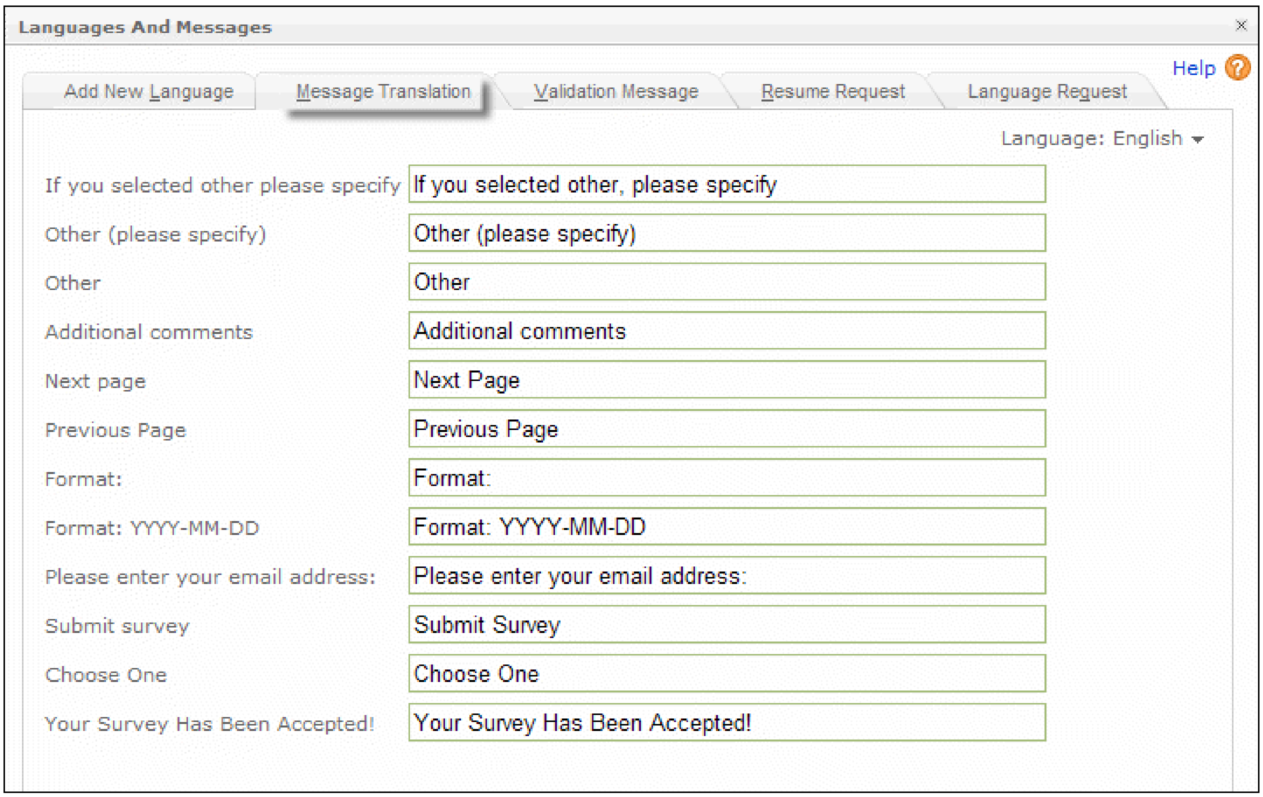
Export Language

Message Translation

This tab contains default text labels that pertain to specific question settings, or commonly used buttons in your survey. Each of these labels can be edited to read as you wish, and are applied globally throughout the survey. They cannot be changed on a single page basis.

Note!
In multi-language surveys, these messages will not be prepopulated in the additional languages. You will have to enter text for the labels/buttons for each additional language you will be using in your survey.

The most commonly used items will be **Next Page**, **Previous Page**, and **Submit**. If your survey does not utilize a particular button or message, you do not have to translate it.



Message Translation Tab

Validation Messages

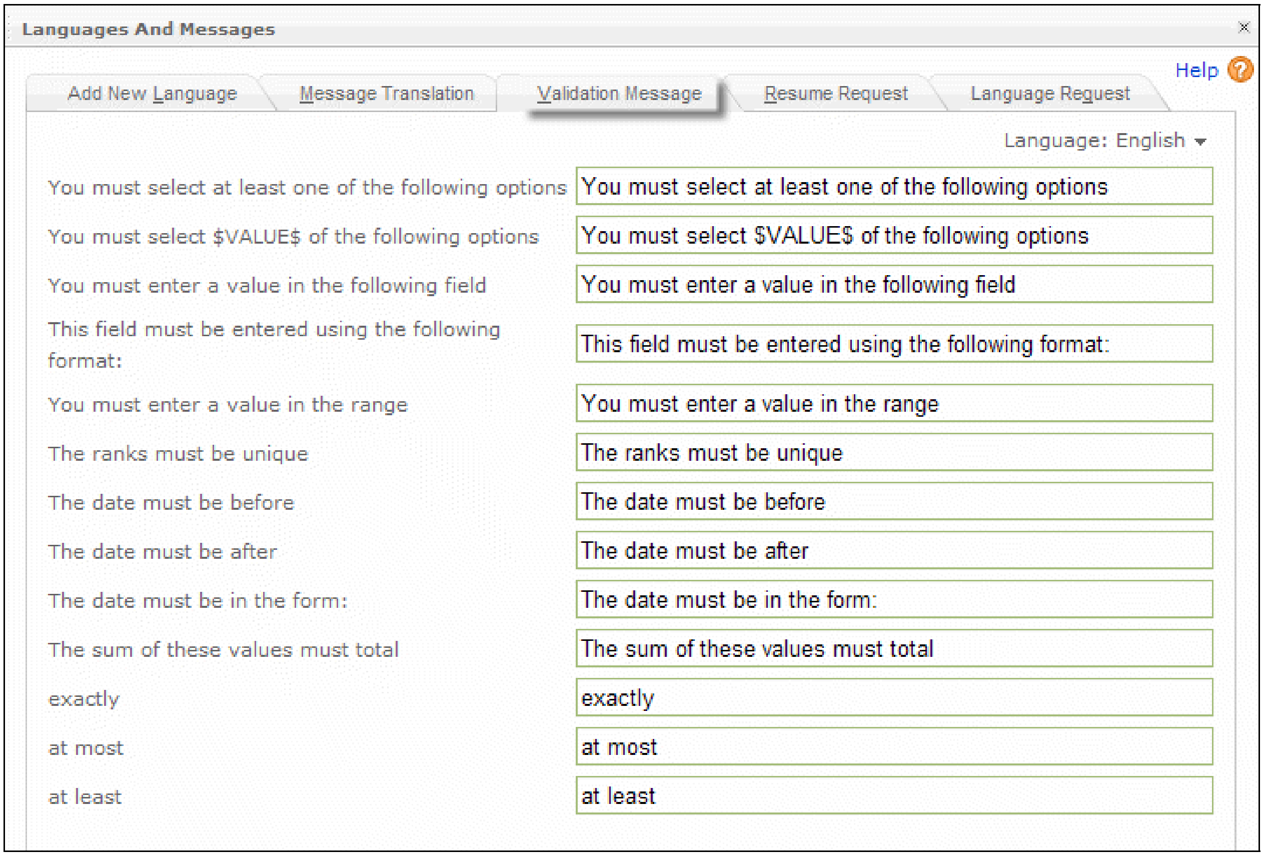
The text fields that are shown under this tab are related to the questions in your survey, and are based on the question type and their settings. These warning messages will be displayed in the form of popup alert messages to a survey respondent.

Example:
If you have a **Choose One** question that is set up to be a required question (meaning the survey respondent must answer this question), and the respondent does not answer that question and tries to go to a subsequent page or submit the survey, the following message will display:

Required Question Alert

Each of the following messages can be edited to read as you wish, and apply to the survey globally.

Warning!
In the second message below, the variable $VALUE$ cannot be removed.



Validation Message Tab

Resume Request

The **Resume Request Page** displays when a survey with **persistence** enabled has been only partially completed. This tab defines what will display on the **Resume Request Page**.

If the respondent completes the survey beyond the first page then exits the survey, they can return to the survey at a later time to complete it. When the link is clicked, the **Resume Request Page** will display with the message **'You have uncompleted surveys that you may take some action on.'** The three default options as described below will appear on the page.

The options are:

> **Resume**
> Resume an existing survey submission at the last unanswered question.
>
> **Resume From First Page**
> Resume an existing survey submission at the first page with the ability to review existing
> answers.
>
> **Delete**
> Delete your existing survey submission.
>
> This option deletes your existing answers. You will be presented with the message **'You have no uncompleted surveys.'** You will have to exit out of this window and take the survey from the beginning.

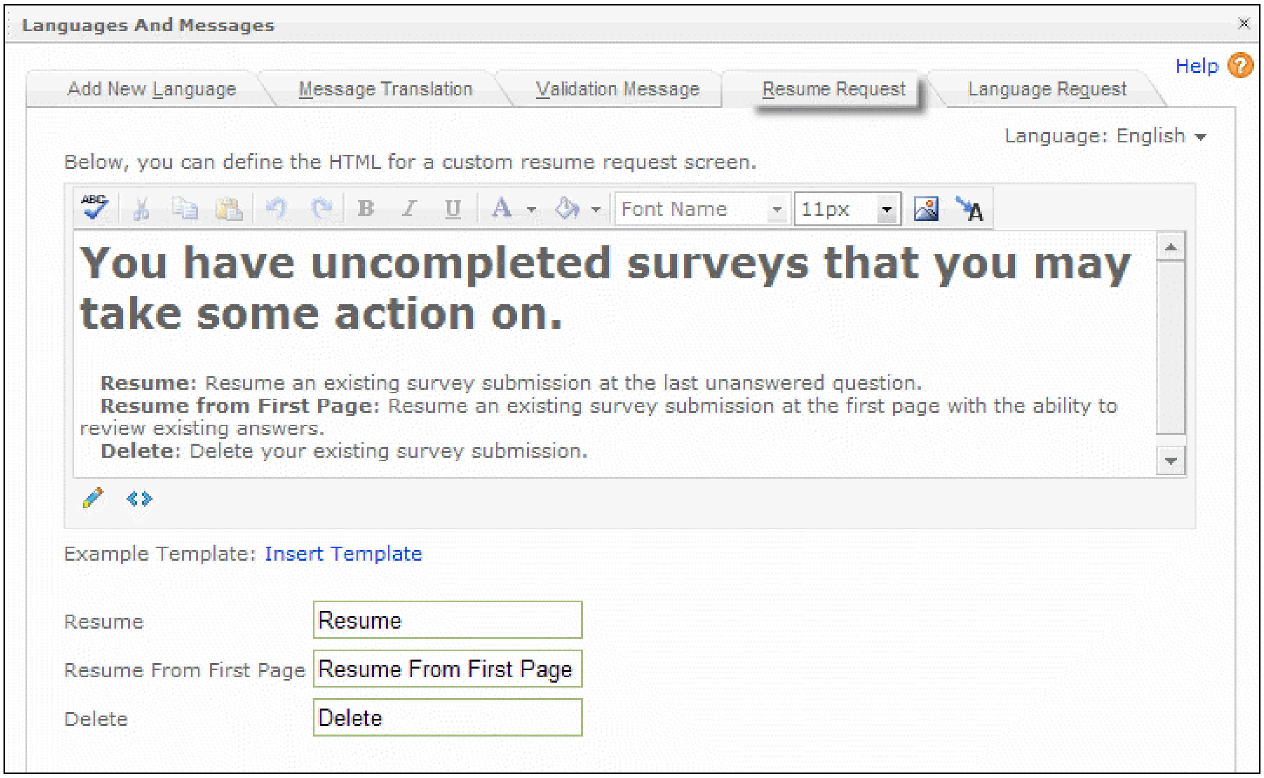
The text of the links and their descriptions can be altered; however, the links cannot be removed.

Note!
Familiarity with HTML is helpful if you plan on editing this page so that necessary tags are not deleted.

Steps

1. Under the **Properties** drop-down menu, click **Languages & Messages**.
2. Select the **Resume Request** tab.
3. Click the **HTML** icon (**< >**) under the display window to edit the HTML code. Click the **Design** icon next to (**< >**) to return to the display view.
4. Click **OK**.

Note!
The 'Insert Template' link below the display window will insert the default Resume Request Page shown below should it need to be restored.



Resume Request Tab

Language Request

You can edit the appearance of the **Survey Language Selection Page** by using the text editor box provided under the **Language Request** tab.

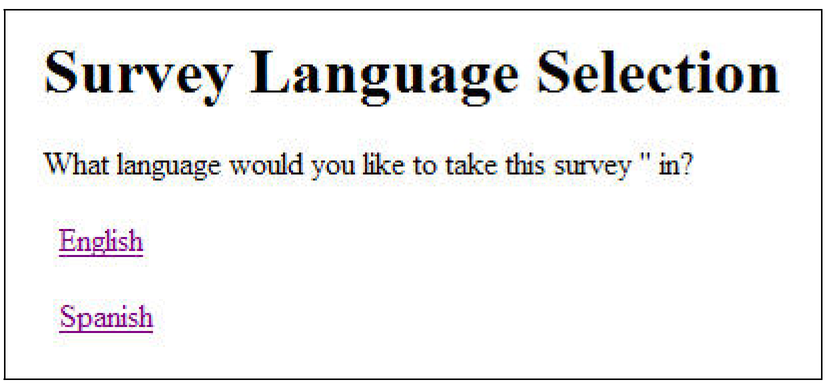
Note!
It is recommended that you have a good understanding of HTML before attempting to edit this page.

Survey Language Selection Page

When a respondent clicks the URL of a survey that has more than one language defined, the **Survey Language Selection Page** is displayed containing links for the different languages available for that survey. The respondent will then choose their preferred language for the survey.

The example below shows the default language selection page for a survey that contains two languages, English and Spanish.

Note!
The survey title will be inserted into the question on the Survey Language Selection Page.



Survey Language Selection Page

Editing the HTML

You can use the **Insert Template** link at the bottom of the tab to insert an example HTML template for the default **Survey Language Selection Page** which can be used as a guide for your page, or you can edit this code with your survey URL and language designators.

Your survey language choices on the **Survey Language Selection Page** will be expressed in your template code as shown in the box below:

```
<a href="%survey_url%renderlang=eng">English</a><br>
<a href="%survey_url%renderlang=span">Español</a>.<br>
```

Tip!
As the default Survey Language Selection Page is displayed automatically for a multi-language survey, it may be easier to copy the source code of this page, then edit it, rather than editing from scratch.

To copy source

1. Click on the **survey link** to see the default language selection page.
2. Right click on the page, select **View Source** to see the HTML.
3. Copy this source code, then paste it in the text editor box under **Language Request.**
4. Make your changes, click **OK**, republish the survey.

Bypass Language Selection Page

You can send respondents directly to a specific language instance of your survey by providing them with an appended survey URL. A delimiter is used and a parameter is added to the end of the survey URL to specify which language version they will access. The delimiter is a **'?'** and the parameter takes the form of a Name-Value pair.

Example:

?renderlang=sp

Using the English/Spanish example above, directing users to the Spanish version of the survey would result in the URL appearing as such:

http://*surveyURL***?renderlang=sp**

Respondents who click on this URL, or copy/paste it into their browsers, will go directly to the Spanish version of the survey. This eliminates the step where they have to choose a preferred language.

Alerts and Triggers

Alerts & Triggers Overview

The **Alerts & Triggers** option is located under the **Properties** drop-down menu when you select **Edit Survey**.

With this option you can set up a trigger based on a certain condition in your survey so that when that condition is satisfied and the survey is submitted, an E-mail notification will be sent to you.

When you first select the Alerts & Triggers option, your List Pane will not have any triggers displayed and you will have to create a **New Trigger**.

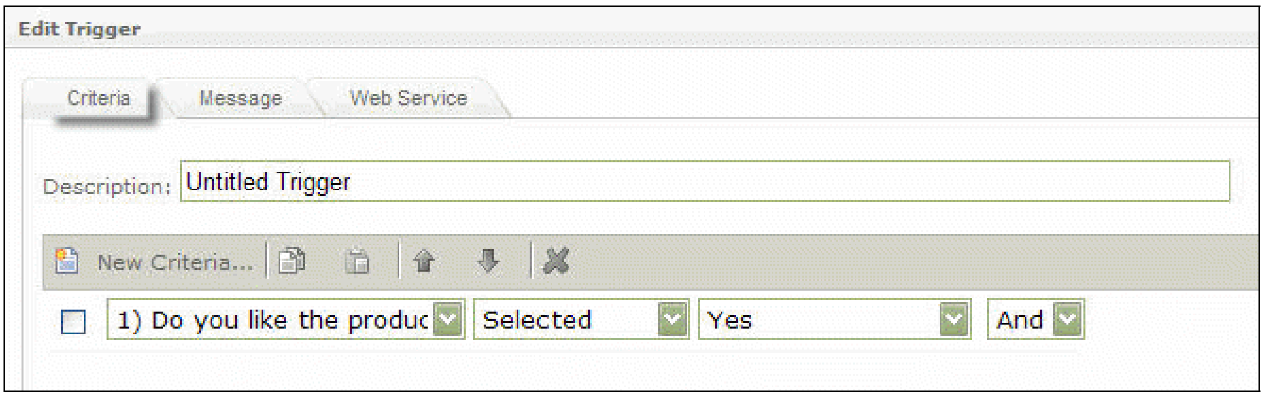
When you begin the process of creating a trigger, three tabs are displayed:

- **Criteria** - Define the parameters of the trigger.
- **Message** - Compose the message to be sent via email.
- **Web Service** - You can specify a Web service to be used to enable proper execution of the trigger functionality.

Criteria

The **Criteria Tab** is where the conditions of your trigger will be specified. You will enter a description or name for the trigger in the text box at the top. There are drop-down lists below the tool bar that are used to specify the parameters of the trigger.

The **first** drop-down list contains all the **questions** in your survey.
The **second** drop-down list contains **conditions** that are used to test against a response to that question.
The **third** drop-down list contains the **response options** to the selected question.
The **fourth** drop-down list is the **And / Or operator** that is used to build compound conditions when you want to check against multiple questions.



Edit Trigger - Criteria Tab

Steps

1. Select **Alerts & Triggers** from the **Properties** drop-down menu.
2. Click **New Trigger**.
3. On the **Criteria Tab**, provide a description or name for the trigger.
4. From the **first** drop-down list, select the **question** to be used for the trigger.
5. From the **second** drop-down list, select the **condition** to be used.
6. From the **third** drop-down list, select the **response option** you want to check for. If the question is a hidden field or text question, type in the response value you want to check for.
7. For a **compound condition**, select a value for the **And / Or operator**.
8. Click **New Criteria** and a new line of drop-down lists will display to make selections from.
9. When selections are completed, click **OK**.

Copy / Paste Conditions

Existing trigger conditions can also be copied and pasted to create new conditions.

Steps

1. Select the check box of the condition to be copied.
2. Click the **Copy** icon just to the right of the **New Criteria** button.
3. Click the **Paste** icon next to the **Copy** icon.
4. The condition is duplicated and displayed below the original selected condition. The new condition can now be edited as necessary.
5. Click **OK**.

Message

The **Message Tab** is where you create the E-mail message to be sent to the addressee that you specify. The message will be sent when the specified **Criteria** are met when a survey is submitted.

The information fields that can be specified are:

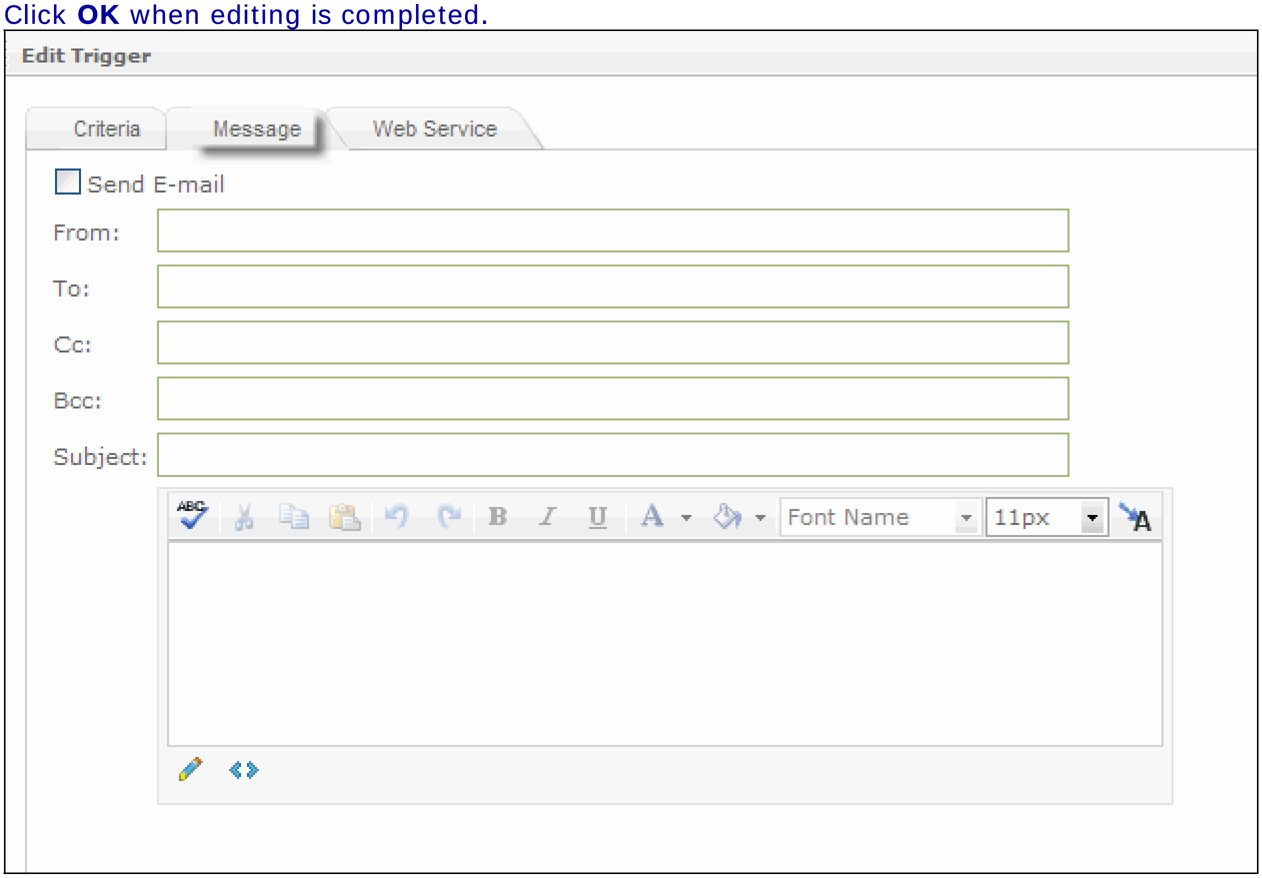
- **Send E-mail check box** - Select this option to send the message in E-mail.
- **From Address** - Specify the E-mail address the message will be sent from.
- **To Address** - Specify the E-mail address the message will be sent to.
- **Cc Address** - Specify additional addresses to send a copy of the message to.
- **Bcc Address** - Specify additional addresses to send a blind copy of the message to.
- **Subject** - Specify a subject line for the message.

The message text will be entered in the main text box at the bottom. You can use the **Editing Tool Bar** to included standard formatting in the message display.

You can also insert a piped value in your message using the **Insert Piped** icon to the far right of the **Editing Tool Bar**.

HTML coding is supported in the message. You can edit the message in **HTML** format by selecting the icon (**< >**) below the message text box. Click the **Design** icon next to (**< >**) to return to the display view.

Click **OK** when editing is completed.



Edit Trigger - Message Tab

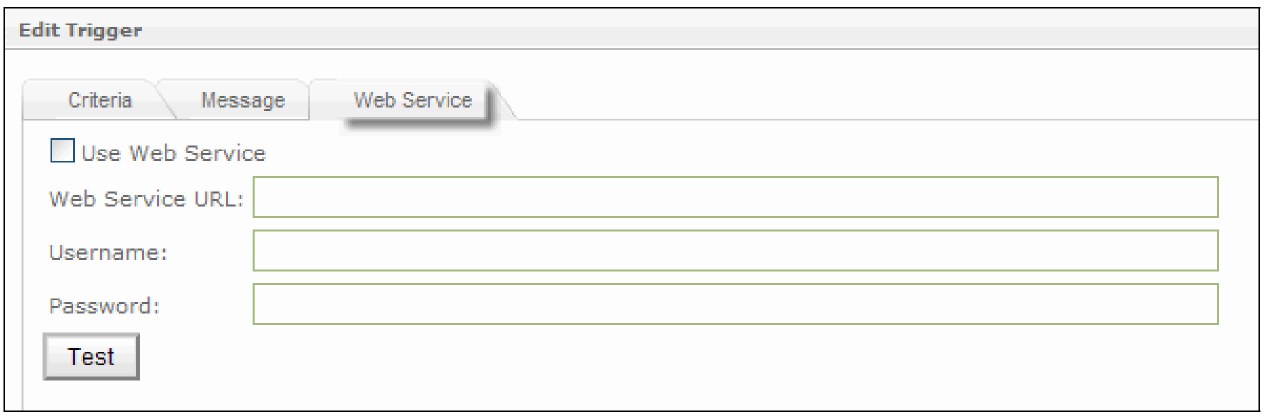
Web Service

Web services allow different applications from different sources to communicate with each other without time-consuming custom coding. Web services share business logic, data and processes through a programmatic interface across a network. Developers can then add the Web service to a user interface such as a Web page or an executable program to offer specific functionality to users.

You can use the **Web Service Tab** to specify that a particular Web service be utilized to facilitate trigger functionality and message delivery.

Fields on this tab are:

- **Use Web Service** - Select this check box to use the particular Web Service specified.
- **Web Service URL** - Specify the URL of the particular Web Service to be used.
- **Username** - Specify the username to access the Web Service.
- **Password** - Specify the password to access the Web Service.
- **Test** - Clicking the **Test** button will test the URL and credentials that have been provided.



Edit Trigger - Web Service Tab

Chapter Twelve

Survey Editing Actions

Discussed in this Chapter

- Actions Overview
- Page Break Wizard
- Spell Check
- Find and Replace
- Survey Detail Report
- Download WSX
- Translating a Survey
- Sharing Your Survey

Survey Editing Actions

Actions Overview

The **Actions** drop-down menu is located on the **Question List Pane** and is available once you create your survey and select **Edit Survey**. It includes the following options:

- **Page Break Wizard**
- **Spell Check**
- **Find & Replace**
- **Survey Detail Report**
- **Download WSX**
- **Translate**
- **Shared**

Page Break Wizard: Use this tool to create regularly spaced page breaks throughout your survey.

Spell Check: Use this tool to spell check the entire survey.

Find & Replace: Use this tool to Find & Replace text in your survey.

Survey Detail Report: Select this option to see a report containing the specifications of your survey setup.

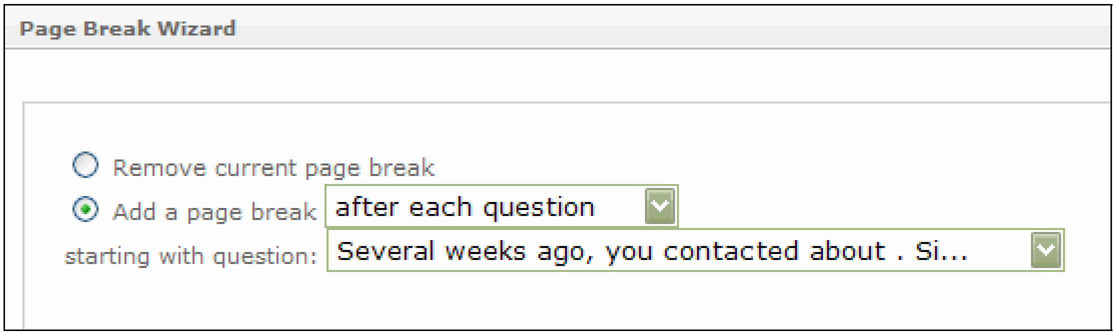
Download WSX: Use this tool to download the actual survey file (wsx).

Translate: Select this option to translate your survey and message text for multi-language surveys.

Shared: Use this tool to share your survey with other users.

Page Break Wizard

The **Page Break Wizard** option is located under the **Actions** drop-down menu when you select **Edit Survey**.



Page Break Wizard

The **Page Break Wizard** will place a simple page break in your survey incrementally based on your selection from the **Add a page break** drop-down menu. The increments are:

- after each question
- after each # questions

Note!
The '#' represents an incremental number in relation to the number of questions you have in your survey. The maximum number will be the number of questions in your survey.

You also designate where to begin placing the page breaks in your survey using the **starting with question** drop-down menu.

Add a Page Break

1. Select **Page Break Wizard** from the **Actions** drop-down menu.
2. Select the page break increment from the **Add a page break** drop-down list.
3. Select the point in your survey where page breaks will be inserted from the **starting with question** drop-down list.

Remove Page Breaks

You can also use the **Page Break Wizard** to **remove all** page breaks in your survey.

1. Select **Remove current '#' page breaks**.
2. Click **OK**.

Spell Check

The **Spell Check** option is located under the **Actions** drop-down menu when you select **Edit Survey**.

Steps

1. Select **Spell Check** from the **Actions** drop-down menu.
2. Click the **Check Spelling** button.
3. The Spell Check window will open and terms that require action will be displayed in the **Not in Dictionary** text box. Alternative **Suggestions** are displayed in a text box directly under the **Not In Dictionary** text box.
4. Select an action button for each term to clear or change it. Buttons are **Ignore**, **Ignore All**, **Change** and **Change All**.
5. There are buttons at the bottom to **Close** the window or **Undo** an action.
6. When spell check is completed, a popup alert is displayed.
7. Click **OK** to clear the alert and the **Spell Check** option automatically closes.

Find & Replace

The **Find & Replace** option is located under the **Actions** drop-down menu when you select **Edit Survey**.

Find Term

1. Enter the text to find in the text box labeled **Text to find**.
2. You can select the check box to **Match Case** to find exactly what you typed.
3. You can search for the **Text to find** value in Question Text, Response Text, and Title, Text & Limits. Select the check boxes for the sections to be included in the Find.
4. Click **Find**.

The Results List

When the **Find** is completed, a page will be displayed listing each item that matched your criteria. The usage of the term is shown on the left with a check box. The actual **Question number** or **section** of the survey where the term is used is shown on the right. The **Question number** listing is a hyperlink that will take you to that question where you can make edits.

Replace Term

1. To **replace** an occurrence of a term, select the check box of that list item. To **replace all occurrences** of a term that was found, select the check box in the left corner of the list bar just above the questions.
2. Type in the new term you want to **replace** with in the text box at bottom.
3. Click **Replace**.

Survey Detail Report

The **Survey Detail Report** option is found under the **Actions** drop-down menu when you select **Edit Survey**.

The **Survey Detail Report** is a summary report of the settings and parameters contained in your survey and can be a useful tool to aid in troubleshooting issues that may arise with your survey setup.

Information provided includes:

- Survey ID (used for technical support and troubleshooting)
- Editable Survey ID
- Survey title
- Identifying comments
- Presentation options for survey display
- Languages the survey in which the survey is written
- Title, Text & Limits settings (title, author, opening text, closing text, result URL)
- Survey Questions and Responses (question type and parameters, actual question text, question ID numbers).

Download WSX

The **Download WSX** option is located under the **Actions** drop-down menu when you select **Edit Survey**. This option is provided for our legacy desktop version users.

The desktop version of the application is required to open and work with these files.

Note!
The desktop version of the application is a legacy version and does not contain all the functionality in the web version.

To Download a WSX File

1. From the **Actions** drop-down menu, click on **Download WSX**.
2. Select the **Published** or the **Working** version of the survey file to be downloaded. The **Published** version will contain all edits up to the time the survey was last published. The **Working** version may contain edits that have not yet been published.
3. Click **Download**.
4. Select **Open** or **Save**.
5. If you **Save**, a default name is given to the file. You can rename and navigate to the folder of your choice to save the file.

Translating a Survey

The **Translate** option is located under the **Actions** drop-down menu when you select **Edit Survey.**

EFM Feedback currently does not automatically translate the survey for you.

After a new language has been defined, you can begin the process of translating your questions to the new language. When you select a language to display the survey in from the **Language** drop-down list, the application is placed in a language "Mode" which is global and covers the **Question List**, **Title & Text**, **Languages**, **Presentation** and **Analysis**. All text that has not been translated to the new language will be displayed in **red** in the Question List.

Tabs are shown under the **Translate** option as follows:

- **Survey** - This tab contains all your survey questions and response options.
- **Title & Text** - This tab contains Survey Title, Opening Text, Closing Text and Redirect URL.
- **Messages** - This tab contains standard messages related to your survey questions.
- **Validation Messages** - This tab contains messages that are used in validation popup alerts and are related to various question types.
- **Resume Request** - This tab contains the Resume Request Page that displays when **persistence** is enabled on your survey.

There are drop-down lists for **Base Language** and **Translate Language** on each of tabs listed above. For each item that is not yet translated, a yellow text box is displayed. When translated text is entered for an item, the yellow highlighting disappears, indicating the question has been translated. If an item is not used in your survey, translation is not necessary.

Steps

1. In the **Actions** drop-down menu, select **Translate**.
2. On the **Survey Tab**, enter your translated text for the survey questions and response options in the text boxes provided.
3. On the **Title & Text Tab**, enter your translated text for the appropriate items in the text boxes provided.
4. On the **Messages Tab**, enter your translated text for the appropriate items in the text boxes provided.
5. On the **Validation Messages Tab**, enter your translated text for the appropriate items in the text boxes provided.
6. On the **Resume Request Tab**, enter your translated text for the appropriate items in the text boxes provided.
7. Click **OK**.

Note: Remember that any items that you want to use in your survey and wish to view in the additional language need to be translated. This includes fields under Title & Text, Message Translation, Validation Messages, Resume Request and Language Request.

Sharing Your Survey

Sharing Your Survey Overview

The **Shared** option is located under the **Actions** drop-down menu when you select **Edit Survey.**

A survey can be shared with those users who are assigned seats within your workgroup on the **Group Users** tab under **Administration**.

A user can be granted **full access** or **share for analysis** access for a particular survey. **Full access** provides the user full editing and publishing rights to the shared survey. **Share for analysis** provides the user access to analysis and reporting features. Sharing a survey is useful for colleague review, giving another user the ability to view up-to-date results, and for collaborated survey creation.

It is important to note that the **level of share access** available (**full access** or **share for analysis**) is dependent upon the type of account you have. This table shows each account type and share access.

Account Type	Share for Analysis	Share for Full Access
Hosted • **TRIAL** • **NOW** • **Standard** • **Professional** • **Professional Developer** • **Team** • **Team Developer**	✓	
Private Hosted • **Enterprise**	✓	✓
Server (Installed) • **Server** • **Server Developer**	✓	✓

Share Access Based on Account Type

Alert!
A survey shared to a user within your workgroup cannot be reshared by that user.
A survey shared to a user within your workgroup cannot be downloaded.
A shared survey cannot be published.

How to Share a Survey

Steps

1. In the **Actions** drop-down menu, select **Shared**.
2. Associated **Users** will be listed in the box on the left. The right side will display boxes for **Full Access** and **Share For Analysis**.
3. Click the user name to highlight it.
4. Click the right arrow button for the appropriate level of sharing you wish to grant to the selected user. Their user name will be placed in the box to the right.
5. Click **OK**.
6. A page will be displayed confirming the survey has been shared and an E-mail will be sent to that person with the confirmation message.
7. Click **OK**.

The user who shared the survey will now see the **Share** icon displayed next to that survey in the **Surveys List Pane**.

The user who the survey was shared to will see the survey displayed in their **Surveys List Pane** with the **Share** icon grayed out next to it.

Note!
If the original survey is altered after it has been shared, those changes will not appear in the shared version(s). For the users with shared versions to have the most up-to-date information the survey would have to be shared again with those users.

Alert!
If you choose to share the same survey with a user that you had previously shared this survey with (reshare the same survey), any edits made by that user to their version of this shared survey will be overwritten.

Additional Sharing Options

Editing a Shared Survey

A shared survey can be edited the same as any other survey. However; if the original owner reshares this survey with you, you will lose your edits. **A shared survey cannot be downloaded or published.**

You can copy a shared survey and save it as a new survey; however, the data will not transfer to the new survey.

Viewing the published survey

If a survey is shared during creation, then edits are made and the survey **published**, the shared version will not include any edits that are in the published version made by the original owner. The user the survey was shared to will only see the **unpublished** version.

Tip!
It is recommended that you complete all edits and publish your survey prior to sharing it to another user.

Remove a survey that has been shared to you

If a survey has been shared to you and you would like it removed from your Surveys List, the survey owner will have to remove the share for you.

Remove Share Status

1. In the **Actions** drop-down menu, select **Shared**.
2. Click the user name in the **Full Access** box or **Share For Analysis** box to highlight it.
3. Click the left arrow button and their user name will be placed in the **Users** box to the left.
4. Click **OK**.
5. The **Share** icon is removed from the selected survey in the list.

Chapter Thirteen

Analyzing and Reporting Your Results

Discussed in this Chapter

Analyzing and Reporting Your Results

Analyzing Your Results

Use: The **Analyze** tab provides the user with information and options that allow them to analyze and manipulate their survey results.

The **Analyze Page** is accessed by selecting the **Feedback** navigation tab and selecting a survey from the List Pane. Next, click **Analyze Data** from the Options Pane and you are placed on the **Analyze** tab.

Note!
In order for the 'Analyze Data' option to be available from the Feedback Page, your survey must be published.

The **List Pane** on the Analyze tab contains the **Question List** from your survey as well as the question type. The **Options Pane** is where charts will display for the questions. It contains buttons for **Analysis Text**, **Properties** and **Notes**, as well as a drop-down menu for **Chart Type**.

The **Info Pane** contains **Quick Tips** links and **Account Messages**.

In the Options tool bar, there are drop-down menus for **Properties**, **Actions** and **Languages**. There are also buttons to **Update Results**, view the **Raw Data** and **Export Chart**.

Properties Drop-Down Menu

Notes - The Notes field is used to add summary text for a question which will be included in your report. The text is placed directly under the graph for that question.
Survey History - The survey history is a list of actions that have been taken against your selected survey. Information presented includes when the survey was created, updating or resetting of results, publishing or republishing the survey and whether or not results were kept or purged.

Actions Drop-Down Menu

Filter Data - You can set a filter to display a subset of the results. A basic filter is based on a particular response option to one of your questions, or it can be based on any of five (5) system fields. Compound filters can also be created to include response options from more than one question at a time. Only those results that meet the criteria of the filter will be displayed. (Show Me)
Crosstab Wizard - Allows you to manage your crosstab analysis settings across applicable questions in your survey. If crosstabs are already set, the wizard can be used to clear them.
Export Data - Export all or part of your survey results to a CSV file or to a file compatible with SPSS.
Reset Results - Clears your local view of the data and sets your results count to 0.

Response History - Allows you to look at survey results grouped by the date each response was received using the following groupings:

- Daily
- Monthly
- Annually

Purge Results - Use this option to delete **all** of your survey data.

Language

If your survey is in multiple languages, you can choose another language to display here. The menu item is disabled (shown in light gray) if the survey uses only one language.

Update Results

Update Results will download any new results from the server that have been received since the last time you updated your results. If this is the first time you've updated results, you'll get all the data received for that survey. The **Update Results** button will display in **red** when there are new results that have not yet been downloaded.

Raw Data

You can use this option to **view and edit the raw data** collected by the survey.

Export Chart

You can save your question chart to a file through this option. You can adjust your chart size by changing the width and height then clicking **Set Chart Size**. To save the chart to your computer, right-click on the chart and choose 'Save Picture As,' then provide a name for the file and navigate to the folder where you want to save the file.

Question List

This pane is a scrollable list of all the questions contained in your survey. When a question is highlighted in the list, the chart for that question is displayed based on your **Properties** and **Analysis** tab settings.

Analysis Text

You can create an abbreviated version of your question and responses text to be displayed on the graph or in the exported data file. Lengthy text will be truncated on graphs and in exports.

Properties Button

This pane displays your chart according to specified parameters selected under the available sections for that question type. The major properties areas are **Style**, **Background**, **Advanced**, and **Statistics**. The properties areas that are available are dependent on the question type.

Notes

You can add summary text for a question which will be included in your report directly under the graph for that question. You can also access this option under the **Properties** drop-down menu on the **Analyze** tab.

View

This option is used to specify the view for the selected question. You can view the **Chart**, responses entered for those questions that are set up with a **'Comments'** field or an **'Other'** field. The drop-down menu will only show those options that are enabled for the selected question.

- **Chart** - view the graph for the selected question.
- **Comments** - view the text entered for questions with the **'Comments'** option enabled.
- **Other** - view text entered for questions with the **'Other, please specify'** option enabled.

Chart Type

There are seven different chart types available:

- Pie
- Bar
- Horizontal Bar
- Area
- Line
- Scatter
- Text Only

Note!
The charts available in the drop-down list are dependent on the particular question type.

Information that is displayed along the bottom of the Analyze screen:
Last Updated - date/time the survey was last updated.
Analyzed - number of responses being analyzed at a given time.
Received - number of responses that have been received.
Filter - whether or not there is a filter set against the data (active/inactive).

Note!
Remember that having a filter set will affect the response counts and what is shown on the graphs.

Analysis Text / Export Version Text

To navigate to this location, click the Feedback tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed.

Analysis version text and **export version** text boxes are both available under the 'Analysis Text' button. Both of these options are useful when you have lengthy text for a question or response. You can use these options to define an abbreviated version of your regular question and/or response text. Lengthy text will not wrap on the graph in Analysis and will truncate.

Note!
When data is exported, the question and response options become column headers in the CSV file and similar truncation could occur.

Question Tab

Analysis version of the question: You can type in a shortened version of the question text that displays on the graph.
Export version of the question: You can type in a shortened version of the question text that displays when you export the survey data to a CSV file.
Export values for 'other': You can designate a value to be used if you have the 'Other, please specify' option enabled and would like the column header to display a different value than 'Other' when you export the data to a CSV file.

1. Select the question in the List Pane.
2. Click the **Analysis** button.
3. Enter **Analysis version** and/or **Export** values.
4. Click **OK**.

Responses Tab

The Response options for the selected question are displayed on this tab. You can edit a response option here to alter its display in Analysis as well as in your exported data.

Response: This column displays the normal text of your response options.
Analysis Text: You can type in a shortened version of the response text that displays on the graph.
Export Text: You can type in a shortened version of the response text that displays when you export the survey data to a CSV file.
Score: Score values are used in weighting and averaging your response options. You can assign a score value that will be attributed to that response option during Analysis. By default, score values are assigned by the application beginning with '1'.
Color: You can change the color of the response option display on the graph. You can choose the color from the palette using the icon or type in the HTML hexadecimal number of the color.

1. Select the question in the List Pane.
2. Click the **Analysis** button.
3. Select the **Responses Tab**.
4. To change or add values, click **Edit** in far right column.
5. Enter **Analysis text**, **Export text**, **Score** and **Color** values.
6. Click **OK** to apply changes.
7. Click **OK** to close window and return to **Analyze Tab**.

Chart Display

To navigate to this location, click the **Feedbac**k tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed.

The center **Options Pane** under the **Analyze** tab is where your charts will display. There are various parameters that can be enabled that control the display of the chart. The options are:

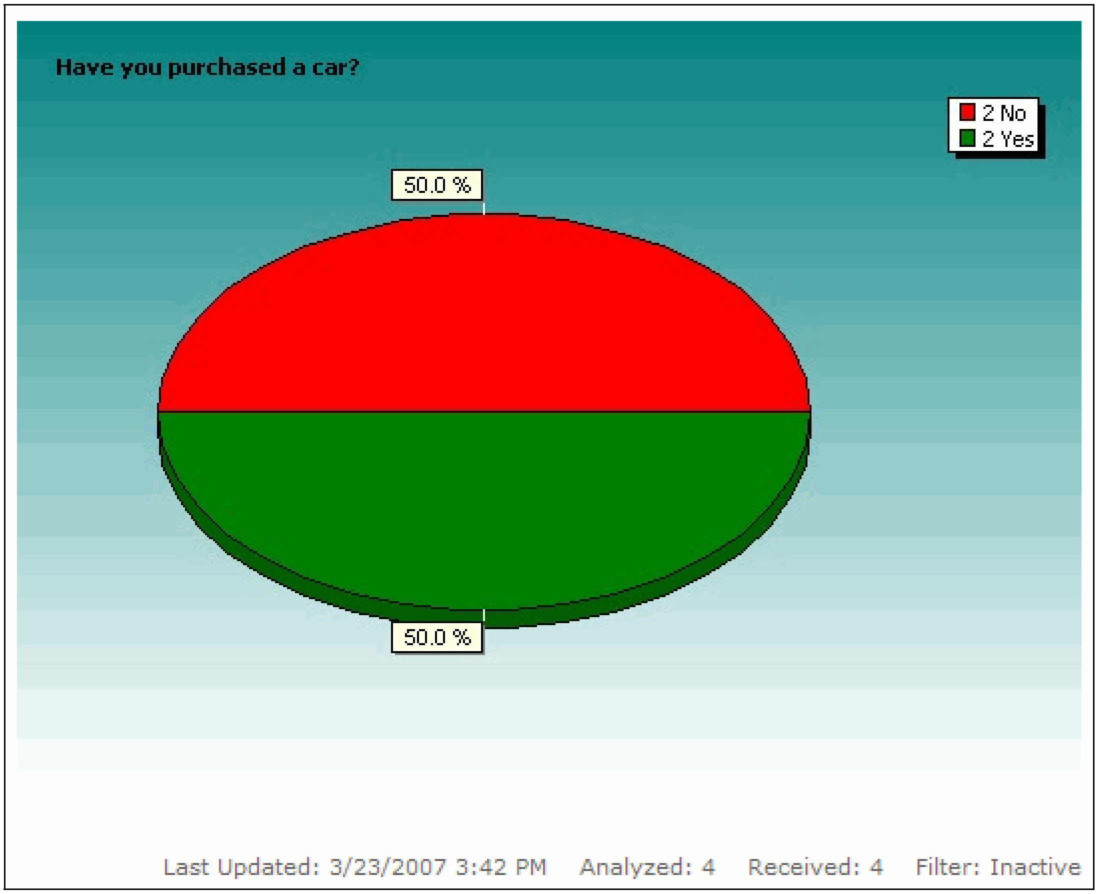
> **Analysis Text**: Use this option to manipulate your question and response option text that will be displayed on the graph.
>
> **Properties**: Set up parameters that control the Style of the graphical display, the Background color(s) of the graph, include Statistical calculations and set Advanced options for response display.
>
> **Notes**: Enter notes and comments that will be displayed under the graph when a report is generated.
>
> **View**: This option is used to specify views for the selected question. The **View** drop-down menu is only visible if you have set up the selected question with a **'Comments'** field or an **'Other'** field. The View options are **Chart**, **Comments** and/or **Other**.

Note!
In addition to the Chart, the View drop-down menu will only show those options that are enabled for the selected question. For example, if you have only enabled 'Comments' you will see View and Comments.

> **Chart Type**: You can set the **Chart Type** using the drop-down menu above the chart display. The chart types available for a selected question depend on the question type.

The chart displayed is specific to the question that is currently selected. You will normally see the **question text** at the top of the chart, and the **legend** in the upper right corner containing the **response options** and **number of responses** for that option.

The graph will be presented with labels that correspond to the response options in the legend.



Analysis - Chart Display

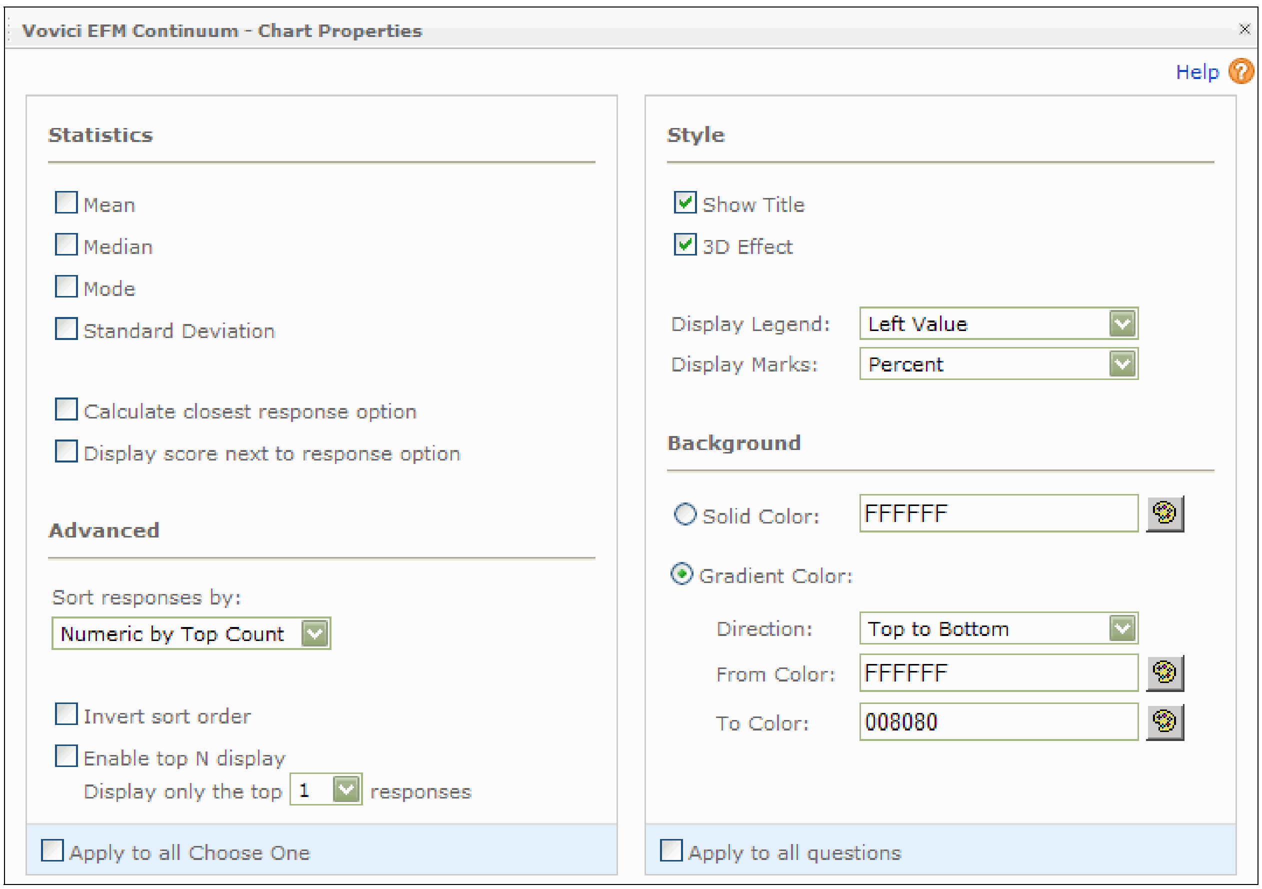
Chart Properties

The **Properties** button on the **Analysis** tab is used to set up most of the display parameters for your charts. The available options and Chart Type are dependent on the question type.

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the **Properties** button to display the Chart Properties dialog below.

Display options can be set for all questions that are of the **same question type** by selecting the check box for 'Apply to all *QuestionType*' on the Chart Properties dialog once you click the **Properties** button. All questions will have **Style** and **Background** options but other available options depend on the question type.

Display options for **Style** and **Background** can be **applied to all questions** by selecting the check box for 'Apply to all questions' on the Chart Properties dialog once you click the **Properties** button.



Properties - Chart Properties Dialog

Style

Select **Show Title** if you want the question to show on the graph.
Select **3D Effect** if you want to see the graph displayed with more definition.
Use the drop-down menus for **Display Legend** and **Display Marks** to control the appearance of the legend or labels on your overall chart.

Statistics

Check the appropriate boxes for **Mean, Mode, Median, Standard Deviation, Calculate closest response option** and **Display score next to response options**. See the chart below for a more detailed explanation of statistical values.

Note!
The statistical options are not available for all question types.

When a **Score** value is added to a **Response Option**, it is this value that is used for the statistical calculation. If no values are entered, the **Score** is set to 1 for the first response option, 2 for the second, etc.

MEAN	The mean is the average value. The mean is calculated by the sum of the values divided by the total number of values.
MEDIAN	The median is the middle value. The median is the number in the middle of a set of numbers; that is, half the numbers have values that are greater than the median, and half have values that are less.
MODE	The mode is the most frequently occurring value.
STANDARD DEVIATION	The standard deviation is a measure of how widely values are dispersed from the average value (the mean). The standard deviation is the square root of the sum of the squares of the difference in each value from the mean divided by the total number of responses.

Statistical Explanations

An example of Standard Deviation:
EFM Feedback computes the **sample standard deviation** (using N-1). The statistic is computed by counting the number of non-'other' responses that are submitted for a specific question.

Example: Consider a survey for which 10 total submissions were received. On question #1, responses received were 1, 2, 1, 3, 4, no answer, 1, other, 1, 3. N-1 for this question is 7 ('no answer' and 'other' are not counted). On question #2, we received responses 1, 2, 3, 1, 2, 3, 1, 2, 3, 1. N-1 for this question is 9.

For more detailed examples of standard deviation calculations see:

http://en.wikipedia.org/wiki/Standard_deviation

Background

This section controls the background color on the graphical display. It can be set as a solid color or as a gradient. Use the color palettes to select the colors you want to use, or enter the HTML color number.

Advanced

You can use **Enable Top N Display** to display only the desired number of responses (top 3, top 5, etc.). Using the **Sort Responses by** drop-down menu, you can sort responses according to Numeric by Top Count, Original Order, or Alphabetically. You can also **Invert Sort Order**.

Tip!
If you have a number of questions that have the same set of response options, using the Chart Properties to Sort Responses by their Original Order will help maintain consistency of the colors used to represent each response option throughout your charts.

Number

The Number option is displayed if your question is a **numeric** value style question. It contains the **Step Value** that your responses will be grouped by. **Step Value** normally defaults to 10. You may change the Step Value to whatever you wish to apply against the question. If you have a large numeric range, it is recommended that you increase the **Step Value**.

Warning!
The Step Value plots each point within the numeric range that is defined for the question. As an example, if you have a numeric range of 1 to 10,000 and you set the Step Value to 1, 10,001 individual points will be plotted on your chart. This may give you the impression that the application has frozen, when, in fact, it is actually trying to sort and plot the values.

Export Chart

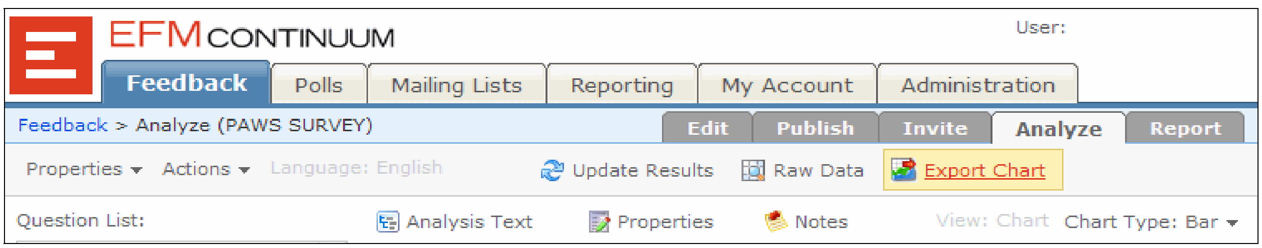
To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed.

The **Export Chart** button is located on the **Analyze** tab above the **Options Pane**.

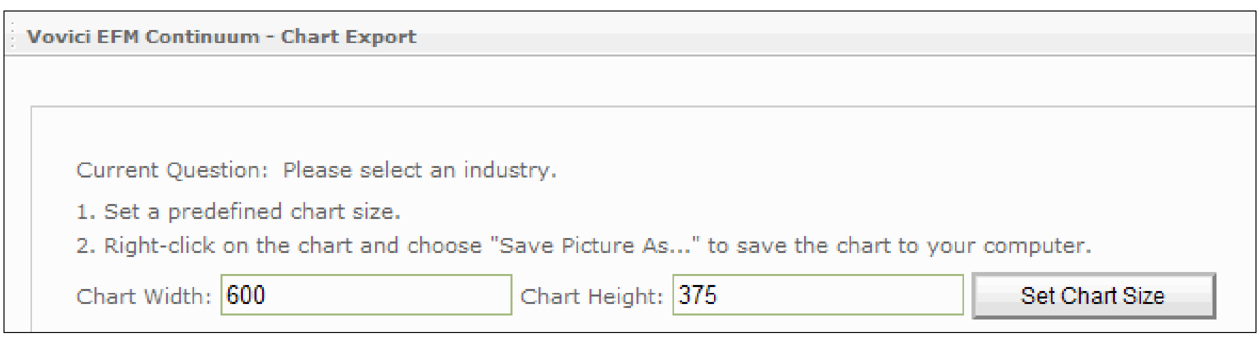
You can save the chart for the selected question to a file using this option.

Steps

1. From the **Analyze** tab, click the **Export Chart** button.
2. Specify a chart size in pixels by entering a number for Chart Width and Chart Height.
3. Click **Set Chart Size**.
4. With your cursor over the chart, right-click and choose '**Save Picture As...**' from the menu.
5. Navigate to the location you want to save the file to.
6. Provide a file name or use the default file name the application provides.
7. Click **Save**.



Analyze Tab - Export Chart



Export Chart Option

Cross Tabulation Analysis

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Crosstab Wizard**.

Cross Tabulation gives you the ability to compare two questions to each other and evaluate relationships between the responses of those questions. You can review the frequency and assess the statistical significance in that relationship. Cross tabulation is particularly useful when you want to assess whether there is a relationship between how your entire respondent base, or a specific subset of respondents, answered two questions.

Crosstabs can be set **manually** through a particular question, or by using the **Crosstab Wizard**.

You can perform a Crosstab analysis by selecting a ***chart type of Text Only on Choose One*** questions. ***A Crosstab cannot be set to or from any other question types***.

Crosstab Wizard

Crosstabs can also be set by using the **Crosstab Wizard** found under the **Actions** dropdown on the main **Analysis** screen. To set crosstabs In the wizard:

1. Select **Crosstab Wizard** from the **Actions** drop-down menu.
2. Choose the question to base the cross tab on from the available questions in the **Cross tabulate with question** drop-down menu.
3. Check the boxes to select other available questions to be included in the cross tabulation. You can click on **Select All** to include all the available questions. Choosing **Select None** will remove the questions from cross tabulation.
4. Click **OK.**

The crosstab analysis is displayed in a chart showing the **Base Question** the crosstab is set from with its response options down the left column, and columns for the response options for the related question across the top of the chart. The data will be presented in percentages and counts, with a row of Total Counts along the bottom.

Setting a Crosstab Manually

1. Select the question that you want to base the **Crosstab** from.
2. In the **Chart Type** drop-down list select **Text Only** as the type.
3. Click **Properties.**
4. Select **Enable cross tabulation**.
5. Select the related question to crosstab with from the **Cross tabulate with question**.
6. Click **OK.**

Purge Survey Results

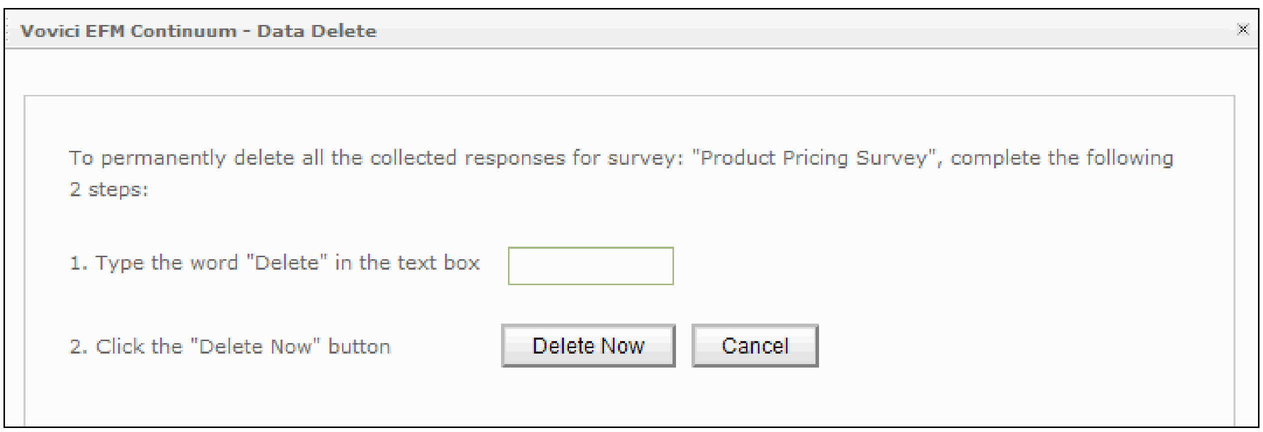
To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Purge Results**.

In most cases, purging survey results should only be done when **clearing out test results** before the survey goes out to your live audience.

Warning!
This process purges all survey results!

Steps

1. Click the **Actions** drop-down menu.
2. Select **Purge Results**.
3. Type the word **'Delete'** in the text box as shown (initial caps).
4. Click the **Delete Now** button.



Analysis - Purge Results

Exporting Your Results

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Export Data**.

Survey data can be exported to a CSV (Comma Separated Values) file or to a file to be used in SPSS (Statistical Package for the Social Sciences) which is a statistical and data management software package for analysts and researchers.

Export to CSV

When data is exported to a CSV file each survey response generates a line in the file. The column headers contain the questions of your survey. Multiple part questions such as a **Choose All That Apply Matrix** will show the question text followed by a particular answer option in the column headers. The exported file will contain **Yes** or **No** in the answer column by default with **Yes** meaning that answer option was chosen and **No** meaning it was not.

Steps

1. From the **Actions** drop-down menu, select **Export Data/CSV**.
2. **Select the questions you would like included in this export.** To select only certain questions, hold down the **Control (Ctrl)** key and click the desired questions with your mouse. To select all the questions, click the first question, hold down the **Shift** key, and then click on the last question.
3. **Export Format Options**. Select a date format from the drop-down list. The **alphanumeric** representation of the date is recommended so that date values display properly in the exported file.
4. You can change the values for **replacing commas in text responses** and the default answer displays for multiple choice questions if necessary.
5. Under **Multiple Language Options** select a character set to be used. Unicode is recommended.
6. Select the file format to export to (default is **CSV**). You can export to a **Tab Delimited Text File** as well.
7. Click **Export**.
8. A dialog will display where you can **Open** or **Save** the export file.
9. If you **Save**, a default name is given to the file. You can rename and save to the folder of your choice.

Note!
A Comma Separated Values (CSV) file is the most common format. This file type can be used with the widest range of database and spreadsheet applications.

A tab delimited text file is another option for the file format. Rather than using commas, the tab character (ASCII #9) delimits each data point.

Export to SPSS

Survey data can also be exported to be used in SPSS (Statistical Package for the Social Sciences) for analysis.

Steps

1. From the **Actions** drop-down menu, select **Export Data / SPSS**.
2. A dialog is displayed with an option to **Get the latest results before export?**
3. Click **Export**.
4. A dialog will display where you can **Open** or **Save** the export file.
5. If you **Save**, a default name is given to the file. You can rename and save to the folder of your choice.

Filter Data

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Filter Data**.

With filtering you can view and analyze a particular subset of your data and report on that data as well. There are two tabs under the **Filter Data** option:

- **Filter Data**
- **Analysis Limits**

Filter Data Tab

This tab is where you specify the parameters of the filter to be applied to your survey data. The filter is based on the response or responses to a particular question in your survey, or on any of five SYSTEM fields listed with your survey questions. You can also build **compound filters** using the **and/or** Operator to combine multiple parameters.

Steps

1. From the **Actions** drop-down menu, select **Filter Data**.
2. Select the **Question** or **SYSTEM field** you want to base the filter on from the drop-down list. When the question is selected, its **response options** will be displayed beneath the question text. You will have to choose an action (selected, did not select).
3. If your filter question is a text question or hidden field, a text box is provided for you to enter the value to base the filter on. You will also have to choose a condition (contains, does not contain, begins with, ends with).
4. Click **Add To Filter**. The filter statement is displayed in the **Current Filter** text box.
5. If it is necessary to remove a filter, you will click **Clear Filter**.
6. Click **OK**.

Tip!
If you are comfortable with query languages such as SQL you can manually modify the Current Filter text. To manually edit your filter text, select Advanced View from the drop-down list to the right. The most common reason to manually modify the filter is to add parenthetical operators to improve the logic of your filter. Example: (this and that) or (blue or green).

Tip!
If you are filtering on a date value always assume the date has an associated time of midnight, 00:00:00. This means a filter of "(DateRcvd > '20060101')" includes any survey submission received after midnight January 1st 2006 and beyond. So if you want to only show surveys submitted after January 1st 2006 your filter needs to be "(DateRcvd >= '20060102')".

Analysis Limits Tab

Analysis Limits are options that can be selected to filter your data in various ways. These settings take effect when you **Update Results**. To have these limits apply to all of your existing analysis data, you will have to **Reset Results** first.

Allow only one response for each E-mail address

Selecting this check box option inserts a question at the end of your survey prompting respondents to enter their E-mail address. ***An entry is required for this question.*** Multiple responses can be submitted from the same E-mail address entered. However, when the responses are downloaded for analysis, only the first submission will be visible. Removing the setting will remove the E-mail question from the survey (if republished) and all submissions will then be viewable.

Allow one response per UniqueID

You can pass a Unique ID into your survey. By passing an ID parameter, any value passed in will automatically be inserted into the UNIQUE ID column in the survey responses. Multiple responses can be submitted from the same unique ID. However, when the responses are downloaded for analysis, only the first submission will be visible. Removing the setting and republishing will allow all responses to be viewable.

Allow only one response for each IP address

The IP address is one of the standard captured SYSTEM fields that show in your actual data. Using this setting will only allow one response for a particular IP address to come through.

Warning!
Since many ISPs pool their IP addresses, using this feature may eliminate people from your response set even though they had only taken the survey one time.

Respondent IP addresses must contain one of the following

Use this option if you know the range of IP addresses of your survey respondents, and would like to limit submissions to only those users with IP addresses in this range. Selecting this option causes the screen to expand and another entry box to appear where you input the IP information.

Example: 206.152.90 will only allow respondents with an IP address from 206.152.90.0 through 206.152.90.255 to submit the survey. Any surveys submitted from IP addresses that do not fall within the specified range will be discarded.

Notes

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Properties** drop-down menu and select **Notes**.

You can also use the **Notes** button located directly above the chart display window.

The **Notes** option provides a text box where you can enter comments that will be displayed in your **report** directly under the graph of the selected question.

1. Select **Notes** from the **Properties** drop-down menu or click the **Notes** button above the chart display window.
2. Enter your comments in the text box.
3. Click **OK**.

Reset Results

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Reset Results**.

When you analyze your survey data, you are working with a local copy of the data rather than accessing the database on the server directly. Selecting **Reset Results** clears your local copy of the data and sets your results count to zero (0). Selecting **Update Results** will then download a copy of your survey data in its entirety.

Note!
Results are not deleted when you Reset Results.

Warning!
If you have manually edited your survey results in any way, these edits are temporary because they are made in your local copy of the data and not in the actual server database. If you wish to save these edits, it is suggested that you export your data before resetting your results.

Be aware that **republishing your survey** can also reset your results if you have edited your survey in such a way that ID numbers of the questions or response options changed.

Example: If you delete a question or response option, the application would then reset your results during republishing and you would have to **Update Results** to see your data again.

View/Edit the Data

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed.

You can view and/or edit the actual survey results by clicking the **Raw Data** button located on the **Options Tool Bar**.

The responses will be displayed horizontally in spreadsheet format. The column headings are comprised of six built-in system fields, followed by the survey questions/response options.

The system fields are:

- **Submission Key:** Each request for the survey (the survey URL is clicked) is assigned an identifier by the server for recording responses properly to the results database. The Submission Key indicates the request number of the respondent's submitted survey.
- **Date Submitted:** The date and time a survey submission was received by the server.
- **Unique ID:** If a value is passed into the Unique ID field, the data will appear in this column.
- **Language:** The language selected by the respondent when the survey was taken is displayed in this column.
- **IP Address:** The IP address the response was submitted through.
- **Email Address:** If the **Analysis Limit** is selected to **'Allow only one response for each E-mail address,'** the text the respondent entered is listed in this column.

You can **view** your survey data in a format that more closely resembles that of the survey itself by clicking on the **Submission Key**. The data will be displayed in a vertical format with the system fields at the top followed by the questions and responses. Response can be edited from this page.

Alert!
Manual edits to your responses are temporary because you are editing your 'local view' of the data. Data cannot be edited on the server.

If you have made manual changes to the results and then Reset Results your changes will be lost.

If you have changed the survey by adding or removing questions or responses and then republish the survey your changes will be lost.

Resetting local results or republishing because the survey was changed has the effect of zeroing out your local view of the results. You then have to Update Results which downloads a fresh copy of all the data in its original state from the server.

Response History

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Analyze Data** from the **Options Pane** and the **Analyze** tab is displayed. Click the arrow next to the **Actions** drop-down menu and select **Response History**.

Survey results are grouped by the date each response was received using the following groupings:

- Daily
- Monthly
- Annually

Selecting one of these options will display a chart that represents when the actual responses were received by the server.

Analysis - View Responses

Reports

Generating Reports

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

The **Report Tab** is displayed by default when you select **Create Basic Report**. Most of the parameters to be included in your report are specified on this tab.

The **Properties** drop-down menu contains:

- **Executive Summary** - Comments and/or summary text about the contents of your report.

The **Actions** drop-down menu contains:

- **Cluster Report** - Generates a report based on a specific question/response in your survey.
- **Public Report** - Generates a report URL that can be used by others to view your report.

To generate a report:

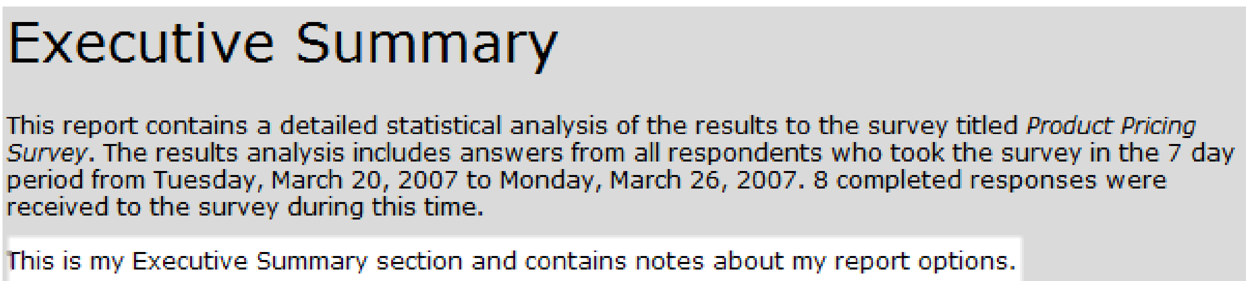
1. On the **Report Tab** specify the questions to be included in the report by selecting the appropriate check boxes in the List Pane. To include **all** of the survey questions select the check box in the List Pane next to '**Questions to Include in the Report.'**
2. Choose **Content Options** by selecting the appropriate check boxes in the Options Pane to include **Text Responses**, **Include Page Breaks between charts**, **Include Notes/Executive Summary**, or **Include question numbers**.
3. Select an option for **Chart sizes when printing** (also located in the Options Pane). The default is **Use window size**. You can designate a specific size for your charts by selecting **Use specific size** and entering numbers for width and height of the graphs. These numbers designate the chart size in pixels.
4. Select a **Report Template** from the drop-down list (also located in the Options Pane) under the title '**Report Template**.' You have the option of **customizing a report template** and saving it for future use.
5. Click **Apply**.
6. Click the **Generate Report** button.

Executive Summary

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

The **Executive Summary** option is located under the **Properties** drop-down menu. The **Executive Summary** option provides a text box where you can write your executive summary which will be displayed directly after the Executive Summary section at the beginning of your report.

1. Select **Executive Summary** from the **Properties** drop-down menu.
2. Enter your comments in the text box.
3. Click **Apply**.


Executive Summary

This report contains a detailed statistical analysis of the results to the survey titled *Product Pricing Survey*. The results analysis includes answers from all respondents who took the survey in the 7 day period from Tuesday, March 20, 2007 to Monday, March 26, 2007. 8 completed responses were received to the survey during this time.

This is my Executive Summary section and contains notes about my report options.

Executive Summary Included in Report

Cluster Report

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

The **Cluster Report** option is located under the **Actions** drop-down menu.

This option uses a specific question in your survey to base the report on and then sets a filter for every unique response option for that question in your data.

When you select the **Cluster Report** option, you will be presented with a list of the available questions to base the report on. Select the desired question and click **Next**. Reports will be produced for each individual response option (***Department*** in our example) and each will be shown as a hyperlink. When you select a response link, the report for that response option will be displayed.

Steps

1. Select normal report options on the **Report Tab**.
2. Click **Apply**.
3. On the **Reports** drop-down menu at top, select **Cluster Report**.
4. Select the question to use for the report from the list displayed in the text box.
5. Click **Next**.
6. The reports are generated and displayed as links. Click the links to see the reports.

Example:

Assume you have a question requiring you to select a **Department**. Response options for that question are:

- Sales
- Marketing
- Research

Set your basic report parameters on the **Report Tab**.
Select **Cluster Report** from the **Reports** drop-down menu.
Choose the question for the report and click **Next**.
There will be reports generated for **Sales**, **Marketing**, and **Research**. Each of these reports will be displayed as links.
Click on the links to see the report.

Customizing Your Report Template

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

When you select the parameters to be included in your report from the **Report Tab**, you have to select a Report Template to use to display the survey. There are various standard report templates included in the application and these are available to select from the drop-down menu under **Report Template**.

Your Report Template can be customized in the same manner as your survey display template. Selecting the option to **Customize HTML** under **Report Template** will place you in the Report Template Edit dialog. It is a simple text editor which can be used to modify the HTML code of the Report Template to produce customized templates that can be saved for future use.

Warning!
Manually modifying a Report Template requires that you have a solid understanding of HTML.

Steps

1. From the **Report Tab**, select **Customize HTML…** under the **Report Template** option.
2. Edit the HTML code as necessary. You can use the **Format HTML** drop-down list to help apply specific formatting in your code.
3. When editing is complete, click **Save Template** and you will be prompted to give the template a name.
4. Click **OK**.
5. The saved template is now available in the **Custom Templates** drop-down list. It can also be selected from there, or selected from the Report Template drop-down list on the **Report Tab**.
6. If you want to **delete** a customized template, you can do this from **My Account / My Library / My Report Templates**.

Standard Fields

The following fields (inserted as HTML comments) are placed in a **Report Template**. These fields will be replaced by the application with the appropriate items when the survey HTM file is generated.

Warning!
Do not remove any of the fields listed below which are Required. Doing so will generate errors in the application and may prevent you from being able to analyze your survey data.

<!--WSBSURVEYNAME-->	Optional	The title of the survey will be placed here.
<!--WSBSURVEYAUTHOR-->	Optional	The author of the survey will be placed here.
<!--WSBRESPONSECOUNT-->	Optional	This will display the number of responses the survey received taking into account any filter you may have set.
<!--WSBVERBOSEFILTER-->	Optional	This will show any filter you may have set limiting your data.
<!--QUESTIONLIST-->	**Required**	This is where the actual report will be displayed in the template.
<!--GENERATETIME-->	Optional	This will display the time the report was generated.
<!--WSBDATE-->	Optional	The current date in a formal, presentation style format. Example: Monday, November 28, 2005.
<!--WSBFIRSTRESPONSEDATE-->	Optional	The date of the first response to the survey, in a formal, presentation style format. Example: Wednesday, November 23, 2005.
<!--WSBLASTRESPONSEDATE-->	Optional	The date of the last response to the survey, in a formal, presentation style format. Example: Wednesday, November 23, 2005.
<!--WSBSURVEYDURATION-->	Optional	The number of days from first survey response to the last survey response.
<!--WSBEXECSUMMARY-->	Optional	You can enter your own executive summary in the Analysis portion of the WebSurveyor interface, and it will be placed at this location. This will be done only if you have selected "Include user analysis" in the Report Options page.
<!--WSBTEMPLATELOGO-->	Optional	Placement of the Company Logo in your report when defined in Presentation.

Public Report

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

The **Public Report** option is located under the **Actions** drop-down menu. This option creates your report and produces a URL to access the report. You can optionally require authentication to access the report.

Password

Entering a value in the **Password** text box will require everyone to first enter the password before accessing the Public Report.

Automatically Update Results

The Public Report will be generated with updated results, giving the report "live" data. The data will be updated each time the Public Report is accessed. If this option is not selected your Public Report will be generated with data from the last time you performed 'Update Results.'

Steps

1. Select all your report options on the **Report Tab**.
2. Click **Apply**.
3. On the **Actions** drop-down menu, select **Public Report**.
4. Select the check box to **Allow Public Report**. The public report URL is then displayed.
5. Select **Automatically Update Results** if you want results to be updated each time the link is accessed.
6. Enter a **Password** if you want to require authentication to access the public report.
7. Click **OK**.

Exporting Your Report

To navigate to this location, click the **Feedback** tab and select a survey from the **List Pane**. Next click **Create Basic Report** from the **Options Pane** and the **Report** tab is displayed.

Once you have created your report, you can export it and save it as a file in any of three different applications:

- MS Word
- Adobe PDF
- MS PowerPoint

Icons for each of these file formats are located on the **Report Tab**.

Steps

1. On the **Report Tab** set up the parameters for your report and click **Apply**.
2. Click the icon for the application you wish to export your report to.
3. A dialog displays and provides **Open** or **Save** options.
4. When you select **Save** you can rename the file and save it to the folder of your choice.

Chapter Fourteen

My Account

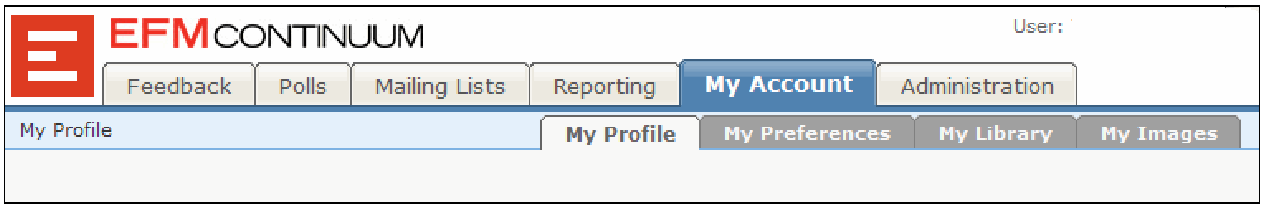
Discussed in this Chapter

My Account Home Page

My Account Overview

Use: The **My Account Page** provides the user with information specific to their account including their personal user profile, question preferences, question and template libraries, and images that are uploaded to their account.

My Account is one of the main tabs that is displayed when you login to EFM Feedback. You simply click the **My Account** tab and the **My Account Page** displays and defaults to the **My Profile** tab.



My Account Tab

There are four tabs under **My Account**:

- **My Profile**: You can update your user profile information or password here.
- **My Preferences**: Specify preferred default settings for your questions and your survey.
- **My Library**: View and manage your personal libraries.
- **My Images**: Manage images in your account.

My Profile

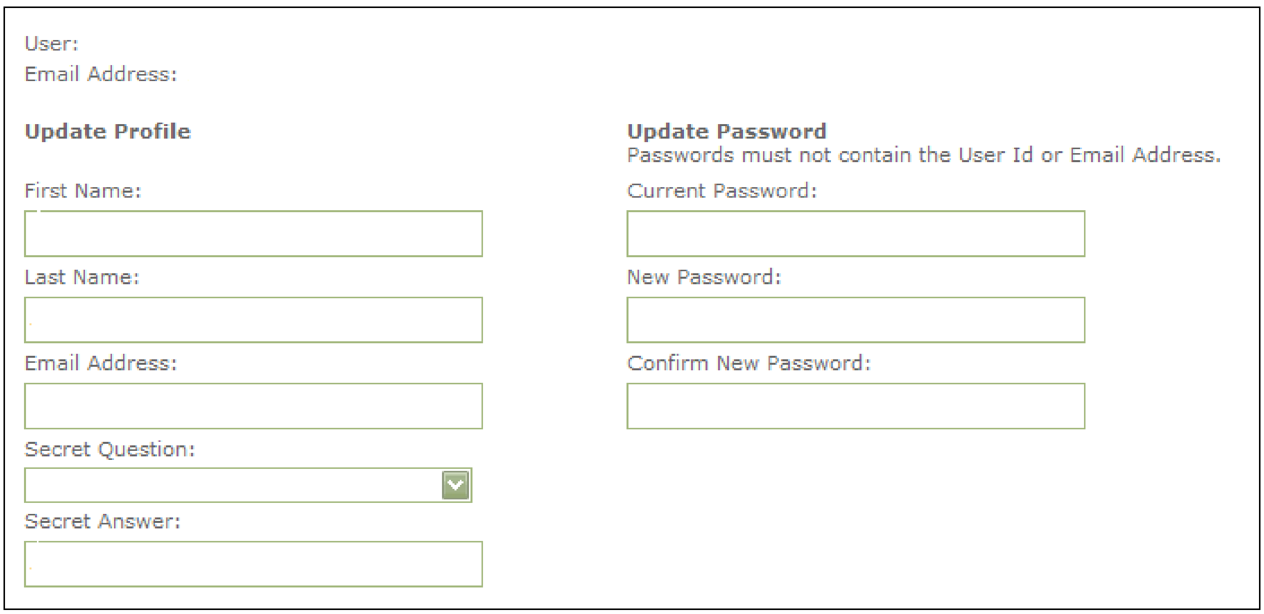
The **My Profile** tab contains current profile information such as your username, E-mail address and point-of-contact information. Under this tab, you have the option to update your user profile or password information as necessary.

Update Profile: Allows you to update your first and last names, your E-mail address and your secret question and answer.

Update Password: Allows you to create a new account password.

Note!
Passwords cannot contain the User ID or email address.

Click **OK** when finished editing.



My Profile Tab

See related topics: My Preferences, My Library, My Images

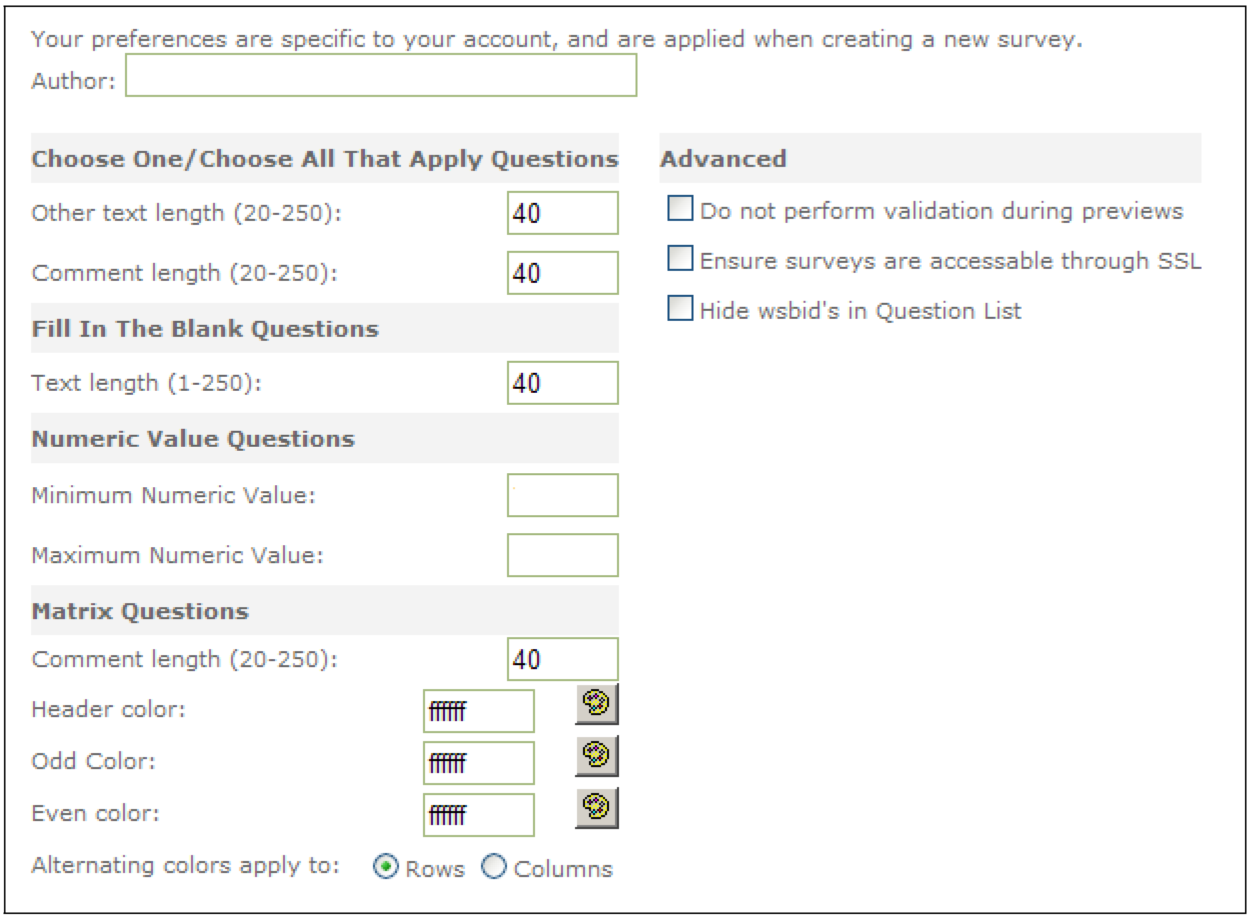
My Preferences

The **My Preferences** tab is located under **My Account** and consists of five main sections, **Choose One and Choose All That Apply Questions**, **Fill In The Blank Questions**, **Numeric Value Questions**, **Matrix Questions**, and **Advanced**. The first four sections are the settings used for particular types of questions when adding new questions to a survey.

Advanced covers default behaviors for previewing, publishing and editing a survey.

When all options are set, click **Apply** at the bottom.

Note!
Existing questions in a survey will not be affected by changes in the Preferences settings. Question Preferences will apply only when a new question is added to a survey, or a new survey is created.



My Preferences Tab

Choose One and Choose All That Apply Questions

The settings for "Other text length" and "Comment length" will set the default length in characters for Other and Comments fields. Users will only be able to type in as many characters as you specify here when providing **Other** responses or **Comments**.

Fill In the Blank Questions

These settings determine the default length for text entry, and min/max values allowed in a response to a numeric question.

Numeric Value Questions

Specify the default minimum and maximum values for Numeric Value questions.

Matrix Questions

You can set the default length of the Comments field (in characters). You can also set the default colors to be displayed when new matrix questions are created. Clicking on the icon will bring up a color palette to choose from, or you can type in the HTML hexadecimal value. Color selections will apply to rows or columns as designated.

Advanced

Do not perform validation during previews will initially suppress the validation option when previewing your survey. This will allow you to scroll through your survey in Preview mode without having to answer the questions.

Ensure surveys are accessible through SSL will initially set the "Ensure survey is accessible through SSL" option when Publishing a survey. SSL is an acronym for Secure Sockets Layer. Surveys can be published with **SSL** enabled to provide an extra level of data security. Your survey URL will begin with **'https'** instead of **'http'**.

Hide wsbid's in Question List will cause the internal id numbers (wsb numbers) of the questions to not show in the Question List.

My Library

The **My Library** tab is located under **My Account**. The **My Library** tab lists any **personal** libraries you have saved in the following categories:

- **Question Library**: You can add questions to your survey from a Question Library.
- **Response Library:** You can add responses to your survey from a Response Library.
- **Display Template Library:** You can customize your survey display template and save it in this library to use for future surveys.
- **Report Template Library:** You can customize your report display template and save it in this library to use for future reports.

You can click on each of these library options and see a listing of libraries you have created. The only action that can be taken against the libraries from this tab is to **delete** them.

To delete a library, select the check box of the library you want to remove, then click the delete icon on the **List Tool Bar**.

My Images

The **My Images** tab is located under **My Account**. You can use the **My Images** tab to manage the images in your account. You can upload, preview and delete images from this tab.

The tab is divided into two panes. The left pane lists all images that are uploaded to your account. The filename of the image, the size of the image and a **Preview** link are provided. The **Preview** pane at right shows you the selected image when you click **Preview**.

Delete an Image

Images can be deleted from your account by selecting the check box of the image in the left pane, then clicking the delete icon in the tool bar just above the image list.

Preview an Image

An image can be previewed by clicking the **Preview** link that follows the image size in the left pane. The image is then shown in the **Preview** pane on the right.

Upload an Image

1. Use the **Browse** button at the bottom of the tab to navigate to the image file that you want to upload.
2. Click on the image title to place it in the **Browse** text box.
3. Click **Upload**.

Chapter Fifteen

Administration

Discussed in this Chapter

Administration Home Page

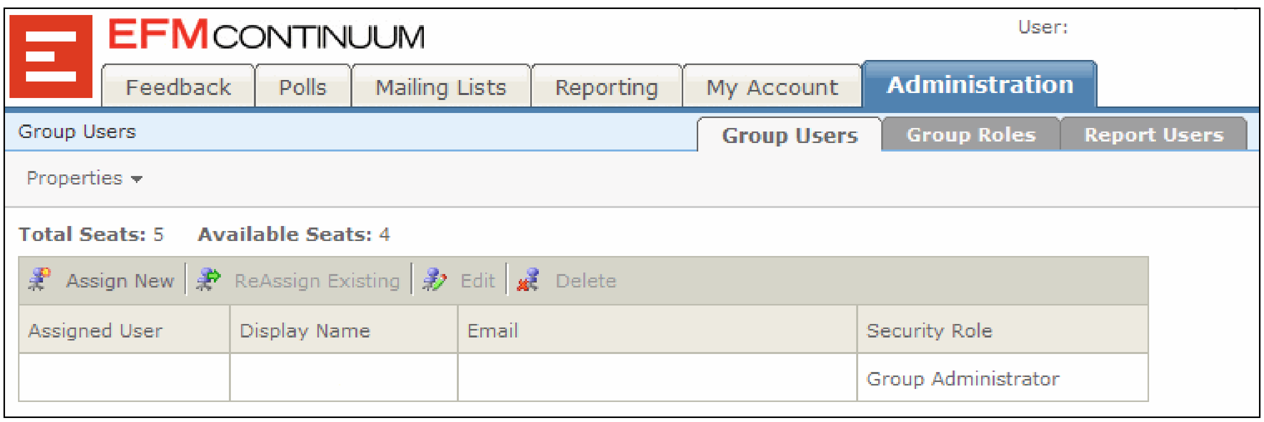
Administration Overview

The **Administration Pane** is broken down into three main tabs:

- **Group Users**
- **Group Roles**
- **Report Users**

You can manage the seats attached to the account through these options, and the specific permissions or roles the users have within the account. Group Administrator level access is required to be able to create roles and assign permissions.

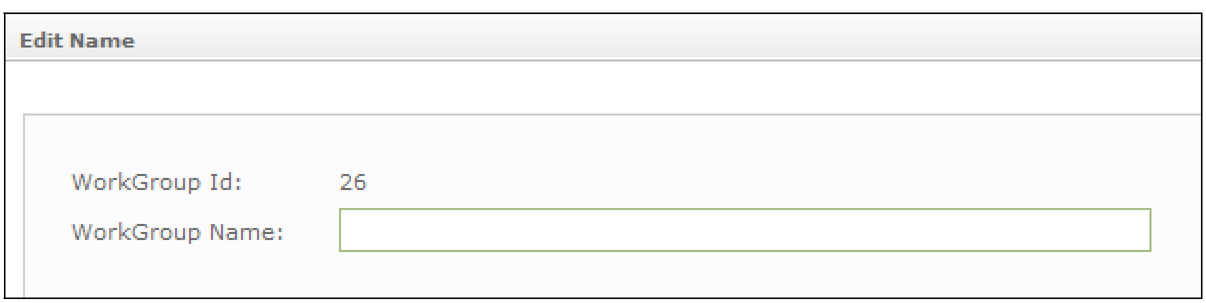
The default screen is the **Group Users** view.



Group Users Tab

The **Properties** drop-down list contains:

- **Name Edit** - This dialog displays your WorkGroup ID number and presents a text box where you can change your WorkGroup Name.



Properties - Edit Name

The number of **Total Seats** is displayed as well as the number of **Available Seats**.

Actions that can be performed against any seat are:

- **Assign New Seat**
- **Reassign Existing Seat**
- **Edit**
- **Delete**

Columns are displayed that show:

- **Assigned User**
- **Display Name**
- **Email**
- **Security Role**

See related topics: Roles Description, Report Users

Report Users

The **Report Users Tab** is located under the main **Administration** page.

This option displays a report listing of your total seats and available seats.

Actions that can be performed against any seat are:

- **Assign New Seat**
- **Reassign Existing Seat**
- **Edit**
- **Delete**

Columns are displayed that show:

- **Assigned User**
- **Display Name**
- **Email**
- **Security Role**

Group Users

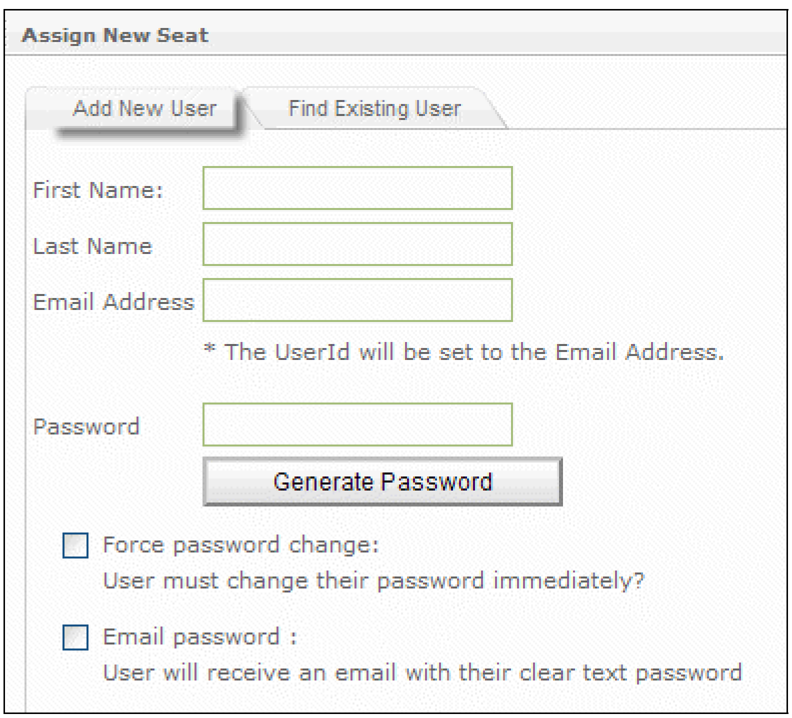
Assign New Seat

If you have available seats on your account, you can assign a seat to a new user easily.

From the **Administration** tab, click the **Group Users** tab at the top of the screen. Your seats and their assigned users will be displayed.

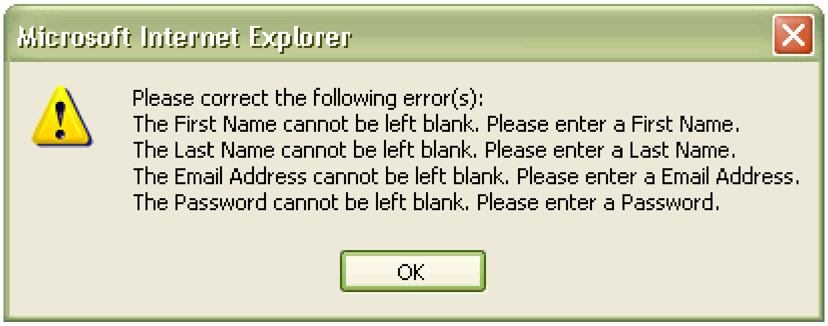
Steps

1. Click the **Assign New** button.
2. Click the **Add New User** tab.
3. Enter the **First Name**, **Last Name** and **E-mail Address** of the user. The **E-mail address** will become the User ID.
4. Enter a **password** of your own choosing, or click **Generate Password** and the application will generate one for you.
5. You can **force a password change**, which will cause the user to have to change the password immediately upon logging in, and/or you can select **E-mail password** which will forward the password to the user in email.
6. Click **OK**.

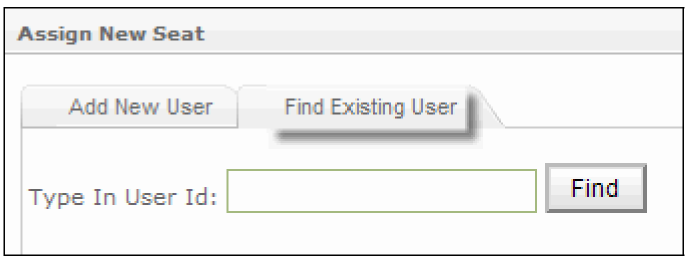


Assign New Seat - Add New User Tab

If the information for the text box fields is not properly filled in on the **Add New User** tab, an alert will be shown as follows:



The **Find Existing User** tab contains a simple email check to see if a user is validated. Upon clicking **OK**, a confirmation or rejection message should be displayed.



Assign New Seat - Find Existing User Tab

If the User ID field is left blank on the **Find Existing User** tab and you click **OK**, an alert will be shown as follows:

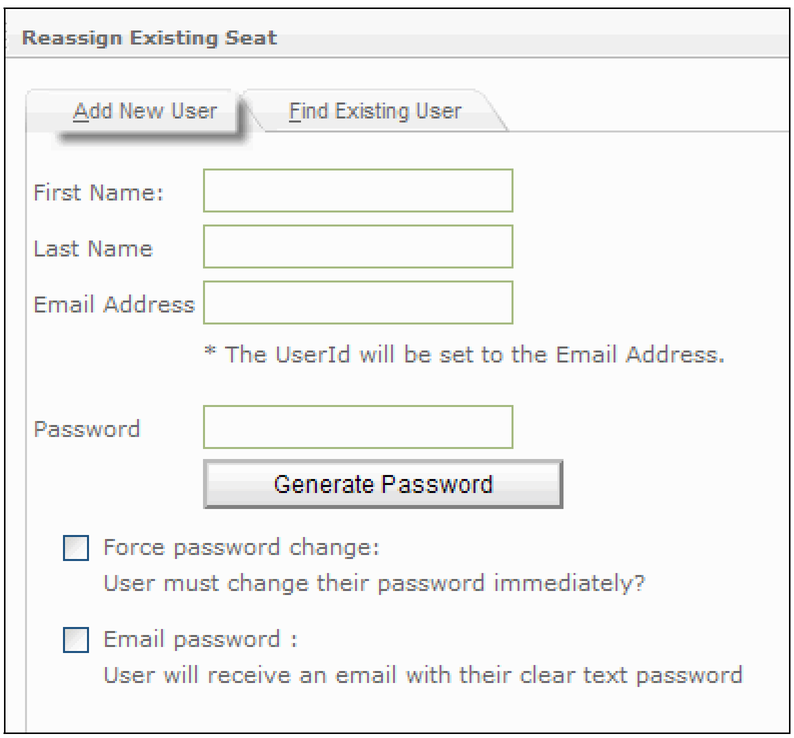
Reassign Existing Seat

If you need to reassign an existing seat on your account to another user, follow the steps below.

From the **Administration** tab, click on the **Group Users** tab at the top of the screen and your seats and their assigned users will be displayed.

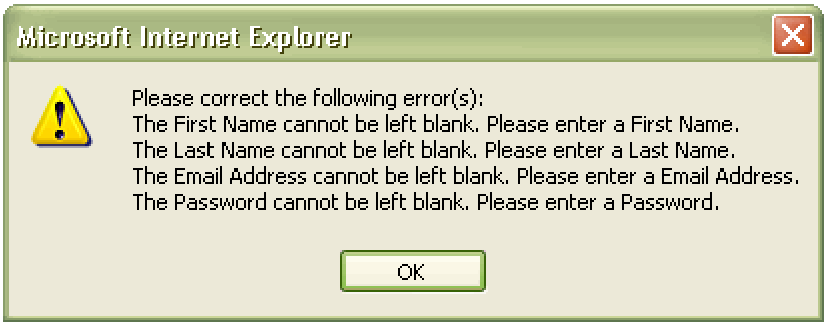
Steps

1. Click the **Reassign Existing** button.
2. Click the **Add New User** tab.
3. Enter the **First Name**, **Last Name** and **E-mail Address** of the user. The **E-mail address** will become the User ID.
4. Enter a **password** of your own choosing, or click **Generate Password** and the application will generate one for you.
5. You can **Force password change**, which will cause the user to have to change the password immediately upon logging in, or you can select **E-mail password** which will forward the password to the user in email.
6. Click **OK**.

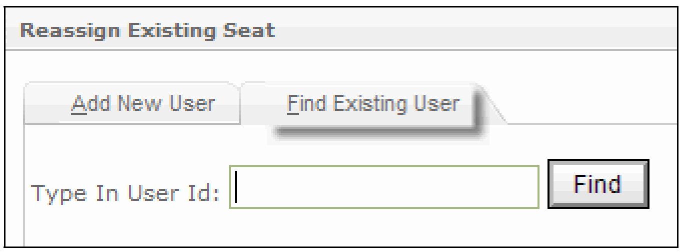


Reassign Existing Seat - Add New User Tab

If the information for the text box fields is not properly filled in on the **Add New User** tab, an alert will be shown as follows:



The **Find Existing User** tab contains a simple email check to see if a user is validated. Upon clicking **OK**, a confirmation or rejection message should be displayed.



Reassign Existing Seat - Find Existing User Tab

If the User ID field is left blank on the **Find Existing User** tab and you click **OK**, an alert will be shown as follows:

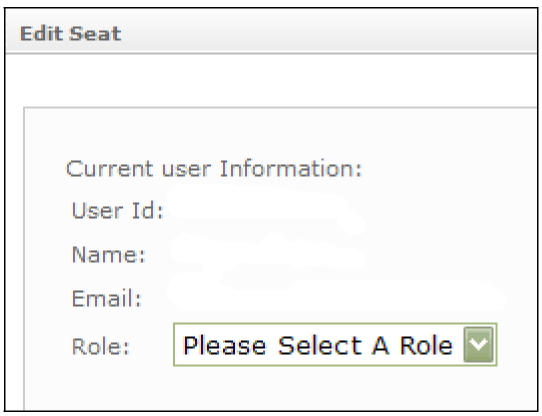
Edit Seat

Use this option to change the role assigned to the currently selected seat on your account.

Steps

From the **Administration** tab, click the **Group Users** tab at the top of the screen. Your seats and their assigned users will be displayed.

1. Click the **Edit** button on the Editing Tool Bar.
2. **Current User Information** will be displayed for the selected seat including User ID, Name and E-mail.
3. A drop-down list for **Role** is displayed.
4. Choose the appropriate role for this user from the list. See a brief description of these roles under the **Group Roles** tab, or see **Roles Description** for more information.
5. Click **OK**.



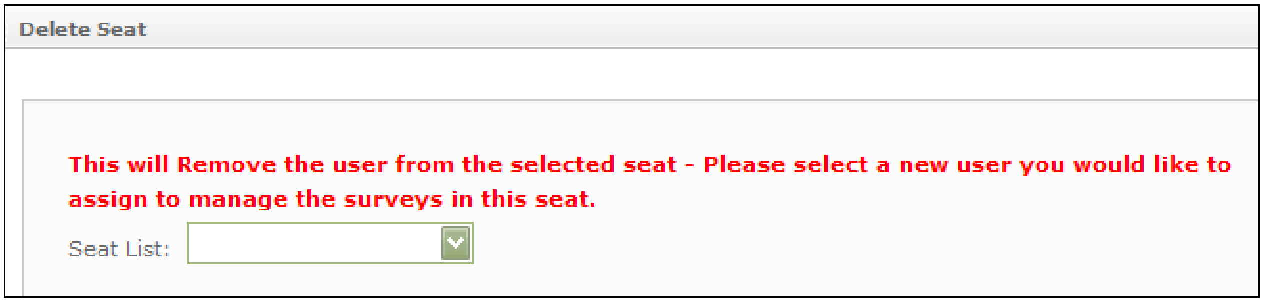
Edit Seat Dialog

Delete Seat

You can remove a user from the selected seat through this option. You are asked to select a new user to assign to this seat.

From the **Administration** tab, click on the **Group Users** tab at the top of the screen and your seats and their assigned users will be displayed.

1. Click **Delete** on the toolbar.
2. Select a user from the **Seat List** drop-down menu.
3. Click **OK**.

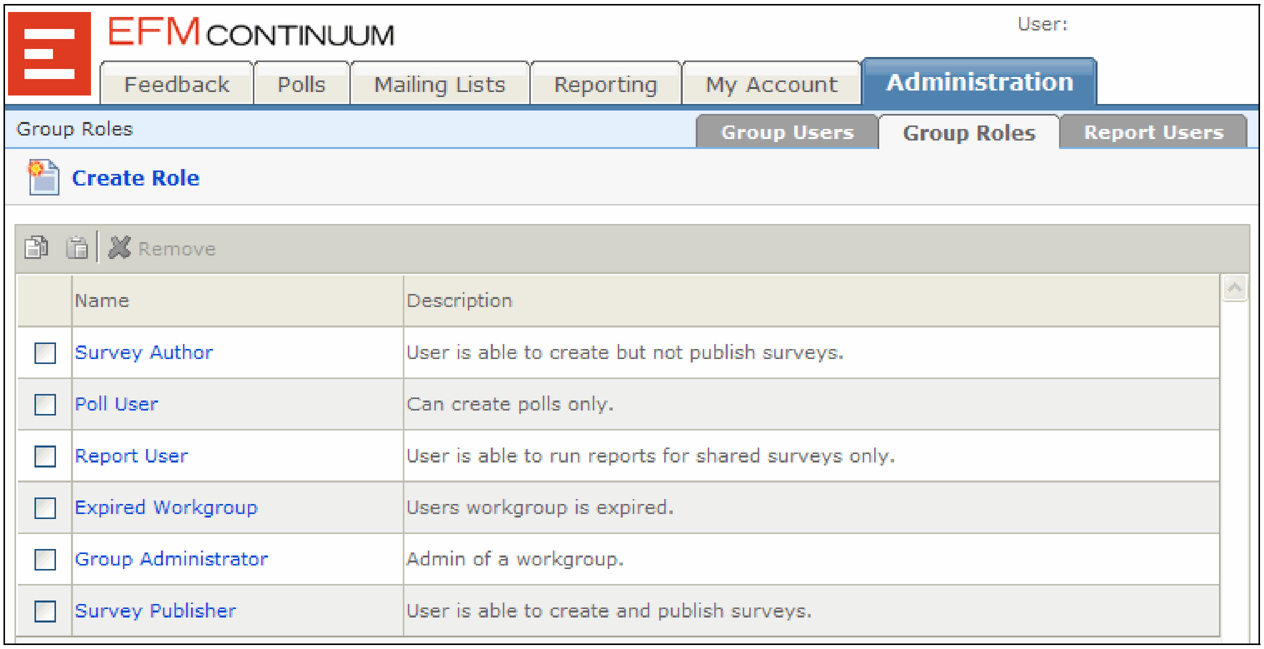


Delete Seat Dialog

Group Roles

Roles Description

Roles determine what actions a particular user can perform with the application. Roles are accessed by selecting the **Administration** tab at the top of the page then selecting the **Group Roles** tab.

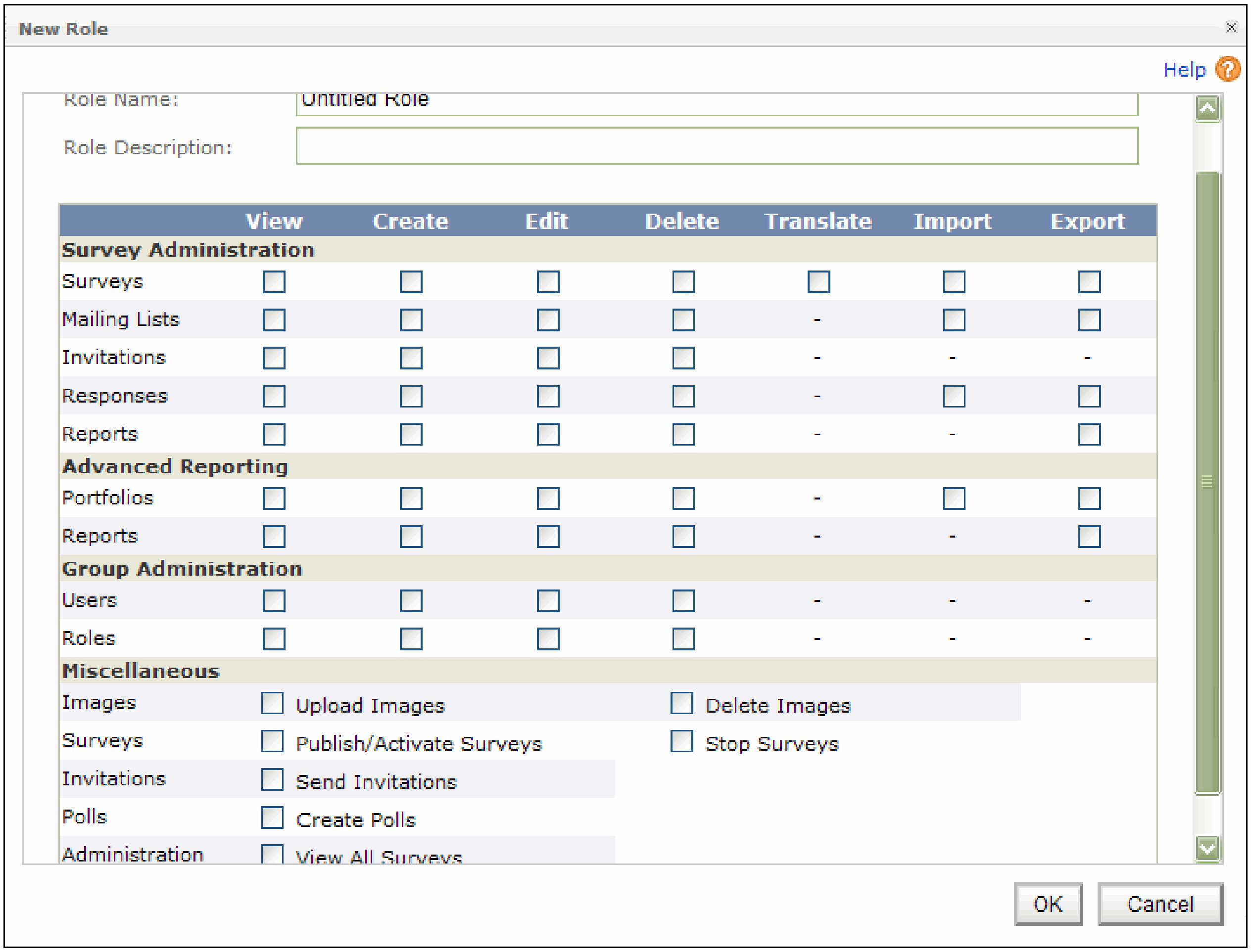


Group Roles Tab - Roles Description

There are predefined default roles for Survey Author, Poll User, Report User, Expired Workgroup, Group Administrator and Survey Publisher and the permissions associated with these roles cannot be changed. The specific settings of the default roles can be viewed by clicking on the Name of the role.

Create a New Role

1. Click on the **Create Role** button.
2. Enter a Role Name and Role Description in the text boxes provided.
3. Select the check boxes for the desired **permissions**
4. Click **OK**.



New Role Dialog - Setting Role Permissions

Copy an Existing Role

1. Select the role to be copied by clicking the check box.
2. Click the **Copy** icon in the upper left corner of the tool bar.
3. Click the **Paste** icon.
4. The new role is inserted in your list, labeled as 'Copy of *OriginalRole*'.

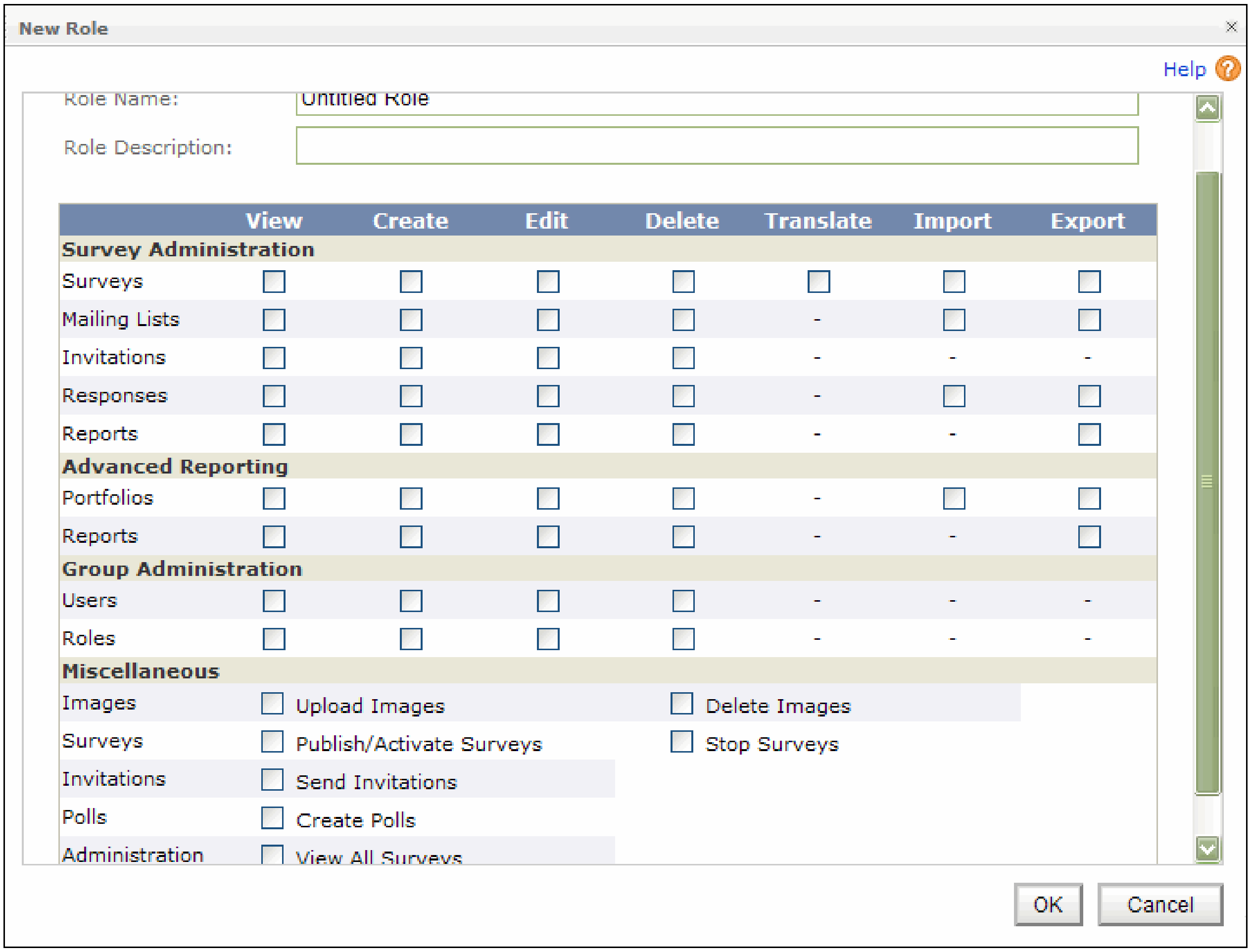
Remove a Role

1. Select the role to be deleted by clicking the check box.
2. Click the **Remove** button.

Permissions

Permissions for a specified user role are set in this dialog when a role is created. Editing of permissions is done in the same dialog by selecting or clearing the check boxes.

The **Role Name** and **Role Description** are entered and displayed in text boxes at the top of the dialog.



	View	Create	Edit	Delete	Translate	Import	Export
Survey Administration							
Surveys	☐	☐	☐	☐	☐	☐	☐
Mailing Lists	☐	☐	☐	☐	-	☐	☐
Invitations	☐	☐	☐	☐	-	-	-
Responses	☐	☐	☐	☐	-	☐	☐
Reports	☐	☐	☐	☐	-	-	☐
Advanced Reporting							
Portfolios	☐	☐	☐	☐	-	☐	☐
Reports	☐	☐	☐	☐	-	-	☐
Group Administration							
Users	☐	☐	☐	☐	-	-	-
Roles	☐	☐	☐	☐	-	-	-
Miscellaneous							
Images	☐ Upload Images			☐ Delete Images			
Surveys	☐ Publish/Activate Surveys			☐ Stop Surveys			
Invitations	☐ Send Invitations						
Polls	☐ Create Polls						
Administration	☐ View All Surveys						

New Role Dialog - Setting Role Permissions

Actions

The **Actions** are shown as column headers at the top of the window. The options are:

- **View:** Controls the ability to view the specified item.
- **Create:** Controls the ability to create the new item.
- **Edit:** Controls the ability to modify the item.
- **Delete:** Controls the ability to delete the item.
- **Translate:** Controls the ability to perform a translation of the item.
- **Import:** Controls the ability to import data into the item.
- **Export:** Controls the ability to save the specified item remotely.

Note!
Some actions cannot be performed on certain features. If this is the case these items do not have a check box.

Survey Administration

- **Surveys:** Controls the permissions for actions related to Surveys.
- **Mailing Lists:** Controls the permissions for actions related to Mailing Lists.
- **Invitations:** Controls the permissions for actions related to Invitations.
- **Responses:** Controls the permissions for actions related to Responses.
- **Reports:** Controls the permissions for actions related to Reports.

Advanced Reporting

- **Portfolios:** Controls the permissions for actions related to Portfolios.
- **Reports:** Controls the permissions for actions related to Reports.

Group Administration

- **Users:** Controls the permissions for actions related to Manage Seats.
- **Roles:** Controls the permissions for actions related to Roles.

Miscellaneous

- **Images:** Controls the ability to upload images and delete images.
- **Surveys:** Controls the ability to open surveys and close surveys.
- **Invitations:** Controls the ability to send invitations.
- **Administration:** Controls the ability to view all surveys.

Chapter Sixteen

Polls

Discussed in this Chapter

Polls

Polls Overview

Use: The **Polls** option is used to create and work with your polls. It is accessed by selecting the **Polls** tab from the **navigation tabs** at the top of the page.

A **poll** is a quick and easy tool to enable people visiting your website to place a vote, or answer a single question, as well as see the results of the poll, allowing you to gain feedback from your visitors instantly.

Go to the Polls **Getting Started** section for more information.

The first time you view your poll workspace, it will be empty and you will be presented with the following options to choose from:

- **Create New Poll** - You can define your own question and responses, as well as customize the presentation of the poll and results.
- **Select A Shared Poll** - You can select from a list of predefined polls (the question and responses have already been created) and customize the presentation of that poll and results for your Web site. The Shared Poll combines votes from your Web site with votes from other Web sites that are using the same Shared Poll, giving you a larger base of votes no matter how much traffic your Web site receives.

The **Polls List Tool Bar** contains options to Delete, Filter and Sort, as well as additional information on each poll including the Poll Title, the date it was updated and the number of responses.

Using the **Filter** and **Sort** drop-down menus, you can control the display of your polls in the **Polls List**.

The **Filter** drop-down menu contains the following categories to view your polls:

- All
- Shared
- User
- With Responses
- Without Responses

The **Sort** drop-down menu contains these options to sort your polls:

- Title
- Response Count
- Last Updated

For each Poll you are able to perform the following actions:

- **Edit Poll** - Edit that poll's content or style options.
- **Delete Poll** - For both **Regular Polls** and **Shared Polls**, this action removes the poll from your **Polls List**. For the user who created the poll this action permanently deletes the poll.
- **Preview Poll** - Displays your Poll as it will appear to respondents.
- **View HTML** - Provides the HTML code snippet of your poll to be inserted into your Web site.

Requirements

To include a poll into your Web page the following requirement must be met:

Page edit rights - You must have rights to edit the Web page where you are placing the poll.

JavaScript enabled - JavaScript is used to handle the poll vote submission, as well as poll/results display. Browsers that do not support JavaScript will receive the following message ***"Your browser does not support JavaScript, therefore the poll cannot be rendered."***

Cookies enabled - Cookies are used to track voting. When you vote, a persistent cookie is created on your machine. This controls what you see once you have taken the poll. If you have voted for a specific poll, then the results are displayed, otherwise the poll is displayed.

Multiple polls can be placed on the same Web page and will act independently of each other. Each poll has its own cookie value. By default, one vote per respondent per poll is allowed.

If you enable the **View Results** feature on the poll display, a cookie is created when they click **View Results**. The results will then be displayed, but they will not be able to vote again until that cookie has expired.

Polls Getting Started

A **poll** is a quick and easy tool to enable people visiting your website to place a vote, or answer a single question, as well as see the results of the poll, allowing you to gain feedback from your visitors instantly.

You can **Create A New Poll** or **Select A Shared Poll**.

The primary steps to getting started are:

- **Creating/Editing a Poll**
- **Adding your poll to a Web page**
- **Tracking your poll's results**

The first time you view your poll workspace, it will be empty and you will be presented with the following options to choose from:

- **Create New Poll** - You can define your own question and responses, as well as customize the presentation of the poll and results.
- **Select A Shared Poll** - You can select from a list of predefined polls (the question and responses have already been created) and customize the presentation of that poll and results for your Web site. The Shared Poll combines votes from your Web site with votes from other Web sites that are using the same Shared Poll, giving you a larger base of votes no matter how much traffic your Web site receives.

The **Polls List Tool Bar** contains options to Delete, Filter and Sort, as well as additional information on each poll including the Poll Title, the date it was updated and the number of responses.

Using the **Filter** and **Sort** drop-down menus, you can control the display of your polls in the **Polls List**.

The **Filter** drop-down menu contains the following categories to view your polls:

- All
- Shared
- User
- With Responses
- Without Responses

The **Sort** drop-down menu contains these options to sort your polls:

- Title
- Response Count
- Last Updated

For each Poll you are able to perform the following actions:

- **Edit Poll** - Edit that poll's content or style options.
- **Delete Poll** - For both **Regular Polls** and **Shared Polls**, this action removes the poll from your **Polls List**. For the user who created the poll this action permanently deletes the poll.
- **Preview Poll** - Displays your Poll as it will appear to respondents.
- **View HTML** - Provides the HTML code snippet of your poll to be inserted into your Web site.

Note!
When you remove or delete a poll from your account, be sure to remove the HTML snippet from any Web page(s) where you have included the poll. If you do not remove the HTML snippet, users will see the error message: *"WSPoll exception: Invalid Poll Display ID:"*

If you vote from the preview window, the vote will be stored and the results will then be displayed.

Requirements

To include a poll into your Web page the following requirement must be met:

Page edit rights - You must have rights to edit the Web page where you are placing the poll.

JavaScript enabled - JavaScript is used to handle the poll vote submission, as well as poll/results display. Browsers that do not support JavaScript will receive the following message ***"Your browser does not support JavaScript, therefore the poll cannot be rendered."***

Cookies enabled - Cookies are used to track voting. When you vote, a persistent cookie is created on your machine. This controls what you see once you have taken the poll. If you have voted for a specific poll, then the results are displayed, otherwise the poll is displayed.

Multiple polls can be placed on the same Web page and will act independently of each other. Each poll has its own cookie value. By default, one vote per respondent per poll is allowed.

If you enable the **View Results** feature on the poll display, a cookie is created when they click **View Results**. The results will then be displayed, but they will not be able to vote again until that cookie has expired.

Create New Poll

You can **Create a New Poll** quickly and easily by following the steps below.

Define Your Core Poll Information

1. Click the **Create New Poll** button.
2. The first **Create/Edit Poll** dialog is displayed where you will define your core poll information.
3. Enter the poll question.
4. Enter the answer options for the poll question. There are Count values next to the answer options with default values of zero (0). You can change these Count values if you want your poll to appear initially with data counts rather than zeroes.
5. **Vote Button Text** and **View Result Button Text** control what text shows for these buttons, and can be edited to suit your needs.
6. Select the **Style of Poll**. A poll can be **"Choose One"** or **"Choose All That Apply."**
7. You can set a closing date for the poll at the bottom of the dialog by selecting the check box and entering the date on which you wish the voting to close.
8. Click **Next**.

Select Style Options

1. Select the **Font** and **Size** of the text to be used in your poll from the drop-down menus.
2. Select the **Font Color**. You can type in a basic color name or use the color palette icon to select a color.
3. Select the **Background Color**. You can type in a basic color name or use the color palette icon to select a color. A predefined background color can also be selected from the drop-down menu at the top of the dialog.
4. Select the **Result Bar Color**. You can type in a basic color name or use the color palette icon to select a color.
5. Select the **Border Color**. You can type in a basic color name or use the color palette icon to select a color.
6. Select a **Border Style** and **Width** from the drop-down menus if you want your poll to have a border.
7. You can define the size of your **Poll/Chart Width** in pixels.
8. Select an option to display your results as **percentages**, **counts** or **both**.
9. To see the total results count on the **Results** view of the poll, select the check box for **'Include total response count in chart.'**
10. To include a View Results link on the poll, select the check box to **'Include option to jump directly to results.'**
11. Click **Finish** to create the poll.

Tip!
If you desire a color that is not shown, you can enter the HTML hexadecimal value of the color in the text box. A selection labeled 'custom' will be added to the drop-down of defined colors at the top of the dialog.

Note!
Including a link to jump directly to the results from the poll page allows respondents to skip directly to the results without casting a vote. Respondents who click this link will continue to see the results until the poll is closed, or their cookie for that poll is deleted.

The poll is now created and shown in the **Polls List Pane**. You have the options to **Edit** the poll, **Preview** the poll, or go the Poll **HTML**.

You must now **add the poll to your Web page** for voters to have access to it.

Select a Shared Poll

A **shared poll** is a predefined poll that includes votes taken from your Web site, as well as votes from other Web sites that are using that **shared poll**, giving you a larger base of respondents for your results no matter how much traffic your Web site receives.

Steps

1. Click the **Select a Shared Poll** button.
2. Select a predefined poll from the list.
3. Click **Next**.
4. Customize the poll display options as needed.

Poll HTML

HTML to include in your Web page

This is the HTML code you insert into your Web page that enables your poll to display. You can copy it to your clipboard, then switch to your HTML editor for your Web site and paste this code into the appropriate location.

```
<script language="javascript" type="text/javascript"
src="http://desktop.vovici.net/wspoll.aspx?wsp_pollid=108"></script><noscript>Your
browser does not support JavaScript, therefore the poll can not be
rendered.</noscript><a target="_blank" id="WSPID_108"
href="http://www.vovici.com/efmpolls"><font size="-2">Vovici Online Survey
Software</font></a>
```

Note!
If you do not copy the entire HTML code snippet, or if you edit the HTML code snippet, your poll may not perform as desired.

Alert!
It is strongly suggested that you do not edit the HTML snippet for a poll though we realize that you may need to change the formatting of the HTML to a degree. Please keep in mind that if you do edit the HTML snippet for a poll, each poll's script tag (<script>) must have an associated anchor tag (<a>) with an ID attribute matching the poll's id. The text 'Vovici Online Survey Software' must also be included as part of the anchor. If any of these required items are omitted, the voters will not be able to submit their votes.

If you experience any problems with your poll functioning incorrectly, we suggest that you copy the HTML snippet "as is" from the Polls HTML page, and paste it into your web page. This usually solves any issues of the poll working incorrectly.

Adding a Poll to a Web Page

When a poll is created, the application produces HTML code that must be added to your Web page to display your poll.

Steps

1. From the main **Polls Page**, select the specific poll you wish to add to your Web page.
2. Click the **HTML** option to the right of the polls list.
3. The **HTML** code snippet for your poll will be shown in the text box.
4. In the text box, click and drag (or use **Ctl-a**) to **select all** of the script code.
5. With ALL of the code selected, right-click and **copy** (or use **Ctl-c**) the HTML script snippet.
6. Open the HTML page where you would like the poll to appear and paste the code snippet in the desired location.

Once you have copied your poll into your Web page, it is ready to collect votes. You can track the results in the main **Polls Page**. When you wish to end your poll, simply remove the poll HTML snippet code from your Web page.

Note!
Once you have added your poll to your Web page, you can alter your poll (change the display style, add / remove options, etc.) without having to add the HTML code snippet into your Web page again as long as it is the same poll (i.e., the poll was never deleted).

Tracking the Poll Results

Once your poll is active and you begin collecting responses, you can check your results from the main **Polls Page**.

The **Current Poll Statistics** will be displayed for the currently selected poll in the **Info Pane** to the far right of the page.

You can view the total number of responses and the percentage breakdown of each response option for that poll.

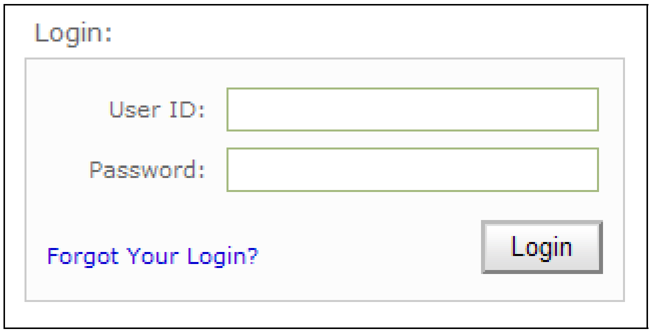
Chapter Seventeen

How Do I Login?

How Do I Login?

Account Login

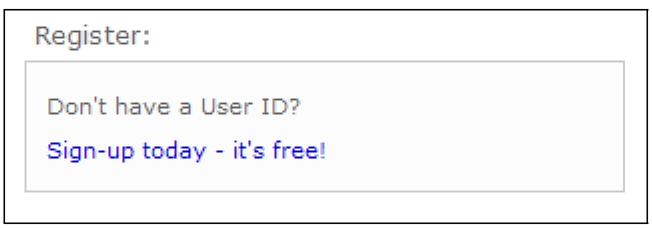
To gain access to your account, you must enter your **User ID** and **Password**. ***Both of these fields are case sensitive!*** Click **Login** once information is entered.



Login Dialog

Access to the account is allowed from one workstation at a time. Accounts should not be shared by users and logins should be unique to an individual. If the account has **multiple seats**, the account holder should **reassign the seats** to individual users.

If you cannot remember your **User ID** and/or **Password**, you can click the Forgot Your Login? link and the system will prompt you for information and will guide you through the reset process through email.



Register For An Account Dialog

If you don't have a User ID and would like to register for an account select the link to **Sign-up today - it's free!**

Forgot Your Login?

If you have forgotten your **User ID** and/or **Password**, the system can provide your **User ID** to you through E-mail along with a request to reset your password.

Steps

1. Click **Forgot Your Login?**
2. Enter your ***E-mail Address*** in the text box.
3. Click **Submit**. You are redirected back to the application Login Page. An E-mail will be sent to you containing your **User ID** and a link is provided along with instructions about how to reset your password.
4. Enter your ***User ID*** and click **Submit**. Your new password is generated by the system and sent to you in an E-mail.
5. Copy (Ctl-C) the new password from the E-mail and then click the link provided in the E-mail to get back to the **Login** page.
6. Login with your User ID and paste (Ctl-V) or type in your new temporary password, click **Submit**.
7. A **Password Expired** screen will be displayed. Enter the information as required. For **Current Password**, use the password the system just generated for you.
8. In the text boxes below the **Current Password**, you will assign a new password and confirm it.

Note!
Passwords are case sensitive and must be at least 6 characters in length.
Passwords cannot contain the User ID or E-mail address.

Chapter Eighteen

Frequently Asked Questions (FAQs)

Discussed in this Chapter

FAQs

Frequently Asked Questions (FAQ) Overview

Welcome to our **Frequently Asked Questions (FAQ)** section. The FAQs are listed according to major functional areas. You can view the questions for the specified areas by visiting the topics below:

- **Surveys FAQs**
- **Polls FAQs**
- **Mailing Lists FAQs**
- **My Account FAQs**
- **Administration FAQs**

Surveys FAQs

What is a required question? A required question is a question in your survey that must be answered before the respondent can leave the current page or submit the survey. The question can be set to **Required** from the Question List Pane Tool Bar or from within the question itself when editing.

How do I change my survey display template? You can change your display template under the Presentation option on the Display Template tab. Navigate to the Feedback Home Page and select a survey title in the List Pane. Now select **Edit Survey** from the Options Pane. Click the down arrow next to **Properties** and select Presentation. Click the **Display Template** tab and select a template to use for your display from the drop-down list.

How do I preview a specific page in my survey? While in the Edit Survey option (Edit tab under Feedback), you can click **Preview** to see how your survey will appear to your respondents. Once in **Preview**, you can navigate to a specific page by using the **Preview Specific Page** drop-down list in the right corner just above the survey display.

How do I restrict access to my survey? There are two main methods to restrict access to your survey. One method is through the Title, Text & Limits option on the **Limits Tab**. Navigate to Feedback/Edit Survey (Edit Tab)/Properties drop-down menu/Title, Text & Limits/Limits Tab. Another method is to add a gateway to your survey.

Can I use conditional logic in my survey? You can implement conditional logic that directs your respondents to specific parts of your survey based on their answers to a particular question(s). See the **Page Break/Conditional Logic** topic for more details.

How do I test my conditional logic question? You can test your conditional logic by **Previewing** your survey and answering the questions where the conditional logic is used. To navigate to a specific page, use the **Preview Specific Page** drop-down list. Select the page where the question is located and that page will display. This will eliminate scrolling through the entire survey.

How do I require a matrix question in a survey? You can require the entire matrix question by selecting the check box next to the specific matrix question in the Question List and clicking the **Required** button in the Editing Tool Bar. You also have the ability to **Require** only certain categories when you edit the question by going to the **Advanced Tab** and selecting the check box for the category you want to **Require**.

How can I get a printed copy of my survey questions? There are two ways you can print your survey questions. From the Feedback/Edit tab, while editing your survey, you can click the **Print** icon, or you can export your survey to MS Word or Adobe PDF and print from those files. **Note:** Exporting to Word and PDF are available from this same screen.

How do I export my survey to MS Word or Adobe PDF? From the Feedback/Edit tab, click the icon (Word or PDF) for the file type you desire. A dialog is displayed with options to Open or Save the file. When saving the file, name the file as necessary and browse to the directory of your choice.

Once I finalize my survey, how do I publish it? The **Publish Tab** is located under Feedback/Publish when you select **Edit Survey**. Once you navigate to this location, simply select the 'Publish' button. You can also access Publish from Feedback/Publish Survey. Click the **Publish** button in the upper left corner.

How do I invite people to take my survey? The most common method (which is also highly recommended by Vovici) is to use the **Mailing Lists** feature and send a campaign. You can also set up different methods through your Web page that will take people directly to your survey, or display a popup asking them if they would like to take the survey.

How do I change my chart display in Analysis? The chart type is changed by using the **Chart Type** drop-down list on the **Analysis Tab**. Navigate to Feedback/Analyze and select the down arrow next to **Chart Type**. **Note:** The chart types available for each question are dependent on the type of question.

How do I create a filter in Analysis? Filters are created in Analysis using the **Filter Data** option located under the **Actions** drop-down menu. You will specify the parameters of the filter and when implemented, only those results that meet the filter criteria will be displayed.

How do I export my data to Excel? Navigate to the Feedback/Analyze tab and from the **Actions** drop-down menu, select **Export Data/CSV** and **select the questions you want included in this export**. To select only certain questions, hold down the **Control (Ctrl)** key and click the desired questions with your mouse. To select all the questions, click the first question, hold down the **Shift** key, and then click on the last question. See the **Exporting Your Results** topic for more information.

How do I generate a report? Reports are generated from the **Report Tab** when you select Edit Survey from the Feedback Home Page. The report includes options that are set on the **Analysis Tab** as well as those set on the **Report Tab**. Select the report type to generate from the **Actions** drop-down menu.

Is EFM Feedback 508 Compliant? Yes, but when creating surveys with Vovici's EFM Feedback application you must ensure that any graphic contained in the survey uses an **Alt Tag** description of the graphic. In addition, some users of screen reader applications have difficulty with table-oriented structures such as those used in a matrix question. Technically, while the matrix questions are still 508 compliant, Vovici recommends that you do not use this type of question if you need to adhere to a strict usage of 508 compliance. The Vovici interface itself has not been reviewed for technical 508 compliance.

How do I add an Alt Tag Description? When a logo is inserted through the display template to show at the top of each page, an **alt tag** which reads '**Logo**' is automatically inserted. If an image is inserted elsewhere in the survey, i.e., in a question, the **alt tag** must be manually inserted in the **HTML** code of the question.

Steps to insert Alt Tag manually

1. Click the question text to edit it.
2. Click the **<>** icon in the lower left corner directly beneath the question text box. This displays the question in **HTML** format.
3. The **alt label** is inserted in the code describing the image.
   Look for **<img alt=""**......
   Insert your **alt label text** inside the quotation marks.
   Click OK.
   Example: <img alt="**ccb logo**" src="/images/users/16828/ccb_logo.gif">

How do I move my survey from Survey Solutions into EFM Feedback? First export your survey from Survey Solutions to a MS Word file.

To export
1. Select the survey from the Survey Pane.
2. From the Actions menu, select Export Questionnaire.
3. Choose MS Word as the format.
4. Save the MS Word file to the desired location on your computer.

Next format the questions and responses in MS Word according to the requirements described in the topic **Creating Survey Questions Using MS Word**. Once this is completed the survey can then be imported into EFM Feedback from MS Word.

Will my survey data transfer from Survey Solutions into EFM Feedback? If your survey has collected responses in Survey Solutions, the data will not transfer to the EFM Feedback application automatically. However, it is possible for our Services Department to perform this operation for you. Please **contact Services** for further details.

Polls FAQs

How do I create a poll? Navigate to the Polls Page by selecting the Polls tab. Your options are 'Create a New Poll' or 'Select a Shared Poll.'

How do I change the colors of my poll? Poll colors are specified when you create or edit your poll. For example: Navigate to the Polls Page, select a Poll from the Polls List Pane and select Edit Poll. The Create/Edit Poll dialog displays and you select your core information. Once you select 'Next' another dialog appears that contains a drop-down menu labeled 'Select a Style.' Click this arrow and your color options display.

How many response options can I have for my poll question? The response options are specified when you define your core poll information. You can specify up to ten (10) response options for your **poll**.

Can a respondent select more than one answer when answering my poll? A poll can be set up as either **Select Only One** or **Select All That Apply**. This option is specified on the first dialog under **Create New Poll**.

How are my poll results displayed? **Poll results** are displayed on the poll itself and are also displayed on the main **Polls Tab** for the particular poll that is selected. Results can be shown as a Percentage, Count, or both.

Can I change the display size of my poll? You can specify the size of your poll by width on the second dialog during the create/edit process where Style options are set. Width is specified in pixels and defaults to 150.

Can I preview my poll before it goes 'live'? You can preview your poll by selecting it from your Polls List Pane and selecting the **Preview Poll** option.

Can I have more than one poll on my web page? Multiple polls can be placed on the same Web page and will act independently of each other.

How do I remove a poll from my web page? You will select the Poll from your Polls List Pane and click the **Delete** icon. A verification dialog will be displayed before the poll is deleted. You also have to remove the HTML code of the poll from any Web pages that were displaying the poll.

Mailing Lists FAQs

What is a Mailing List? A **Mailing List** is the list of recipients that will be invited to take your survey. It will contain the E-mail addresses of the recipients as well as any other information that may be passed into the survey results.

How do I create a Mailing List? Creating a mailing list involves two main steps. You create the **list structure** and give it a name, and then you add data to the list. See the **How To Create A Mailing List** topic for more information.

How do I add data to my Mailing List? Data can be added to your mailing list manually or by importing data from an external CSV (Comma Separated Values) file, usually viewed in Excel. There is also an option to **Add Multiple E-Mails** which can be used to easily add E-mail addresses to your list.

What is a campaign? A **campaign** is the mechanism that associates your survey with your mailing list. It is where you create the message text that will be sent to the recipients in your mailing list inviting them to take part in your survey.

How do I create a campaign? Navigate to the Mailing List Page and select your Mailing List from the List Pane. Next select the **Manage E-mail Campaigns** option and click **Create New Campaign** to set up the parameters and text for your message.

What is a gateway survey? A gateway survey page allows you to place limits on who has access to your survey by requiring them to log in before taking your survey. The login values on the gateway page are verified against the values in your mailing list. See the **Create New Gateway** topic for more information.

How do I create a gateway survey? From the Mailing List Home Page, select a mailing list from the List Pane and select the **Gateway Surveys** option from the Options Pane. From the **Gateways Tab** you select **Create New Gateway** to begin the process of building a login page for your survey.

How do I track the respondents who submit my survey? You can capture an E-mail address or specific information from a column in your mailing list through the **campaign field mapping** process. If you are using a gateway page, tracking is done through **field mapping during the gateway page setup**.

Can I send a test message before I send the campaign to my entire mailing list? It is recommended that you send a test message before scheduling your campaign. Select the **Send Preview** tab to send a test message to the E-mail address you specify.

How do I send my campaign? There are two ways to send your campaign. One way is to select the check box next to "Schedule message to be sent in 10 minutes" on the Campaigns Message Edit dialog, which will send your message out ten minutes from the time you click **OK**. Or you can schedule it for a later day and time by using the calendar icon on the Campaign Messages dialog. To access the scheduling dialog for your campaign, navigate to the E-mail Campaigns tab and click the title of the campaign that you want to schedule. It is located in the List Pane (under the Subject column). The Campaign Message dialog displays. Under the schedule column, select the calendar icon and choose the date and time you want to send out your invitation.

Why hasn't anyone received my invitation? E-mail addresses **must** be in the predefined **E-Mail** column for the invitation to be sent. To check this, select your list from the List Pane on the Mailing Lists Home Page and click **Edit Mailing List**. When your mailing list opens, verify that the E-Mail addresses are in the E-Mail column. You can also check the **campaign** by selecting your list from the Mailing Lists Home Page and clicking **Manage E-Mail Campaigns**. On the E-Mail Campaigns tab, select your campaign (from the Subject column) then click on the Message Recipient List tab. Status counts for the invitations will be displayed that track whether invitations were sent successfully or if an error occurred. Error messages will be displayed on this tab.

How do the Reminder, Follow Up and Thank You features work? A **Reminder** campaign sends a message to everyone in the mailing list that has **not yet submitted** the survey. A **Follow Up** campaign sends a message to **everyone in the mailing list**. A Follow Up campaign might be sent to recipients to provide additional information or make a correction to the original campaign message. A **Thank You** campaign sends a message to everyone who has **submitted** the survey.

How do I check the status of my invitation? There are a series of counts that track status of different aspects of your campaign delivery. The counts are **Base**, **Success**, **Bounce**, **Click** and **Submit**. These counts are displayed for the selected list when you choose **Manage E-mail Campaigns**. They are also displayed on the Campaign Messages dialog when you select a specific campaign to view.

How do I use hidden fields with my Mailing List? Hidden fields can be used to pass data from your mailing list into your survey results. The **hidden fields** must be contained in your published survey. They are added as questions at the top of your survey. The **field mapping in the campaign** then associates the survey with the mailing list. When the survey is submitted, the respondent's values are retrieved from the mailing list to populate the hidden fields. The data values will then be displayed in your **survey results**.

My Account FAQs

How do I change my profile information? Your profile information is located on the **My Profile** tab under the **My Account Home Page**. You can change personal account information for first and last names, your E-mail address and your secret question and answer.

How do I change my password? You can reset your account password on the **My Profile** tab under the **My Account Home Page**. Enter your current password, then specify and confirm the new password.

How do I change my question Preferences? Question preferences are specified on the **My Preferences** tab under the **My Account Home Page**. These default settings are applied when you create a new survey. They do not apply to existing surveys.

How do I change the default colors for my matrix questions? Default colors for matrix questions are specified under **My Preferences**. You can change the header color, odd column color and even column color. Use the color palette icon to choose your colors or type in the HTML hexadecimal value for the color if you know it.

Can I change the fixed length of text responses or comments? The default length for comments and text questions is specified under **My Preferences**. Specify the desired length in characters up to a maximum of 250.

Can I suppress question ID numbers from displaying in my Question List? Each question and response option has a unique internal ID number (**wsb number**) associated with it. You can suppress the display of these ID numbers under **My Preferences** by selecting the check box to **'Hide wsbid's in Question List.'**

How do I view and manage my personal libraries? Personal libraries are listed on the **My Library** tab under the **My Account Home Page**. They are divided into four categories: **My Questions**, **My Responses**, **My Survey Templates** and **My Report Templates**. You can view any saved personal libraries in these categories and delete them from the **My Library** tab if necessary.

How do I upload a logo into my account? You can upload a logo into your account using the **My Images** tab under the **My Account Home Page**. Images can be previewed and deleted from this tab as well.

How do I preview a logo in my account? Click on the **My Images** tab from the **My AccountHome Page** to see a list of logos that are uploaded into your account. Each logo will have its name, size, and a **Preview** link displayed. Click the **Preview** link to display the logo.

Administration FAQs

How do I assign a new user to an available seat? You can a**ssign a new user** to an available seat on the **Group Users** tab under the **Administration Home Page**. Click on the **Assign New** button and enter the requested information.

How do I remove a user from an assigned seat? You can remove a user from an assigned seat on the **Group Users** tab under the **Administration Home Page** by selecting **Reassign Existing** or **Delete**.

How do I change the role assigned to a particular user? Navigate to the **Administration Home Page** and select the Group Roles tab. If the role is not a default role, you can click on the Role Name and edit the **permissions** of the role. Default roles cannot be edited.

How do I create a new role? On the **Group Roles** tab under the **Administration Home Page**, click **Create Role**. You'll enter a name, description and select the desired permissions for the role.

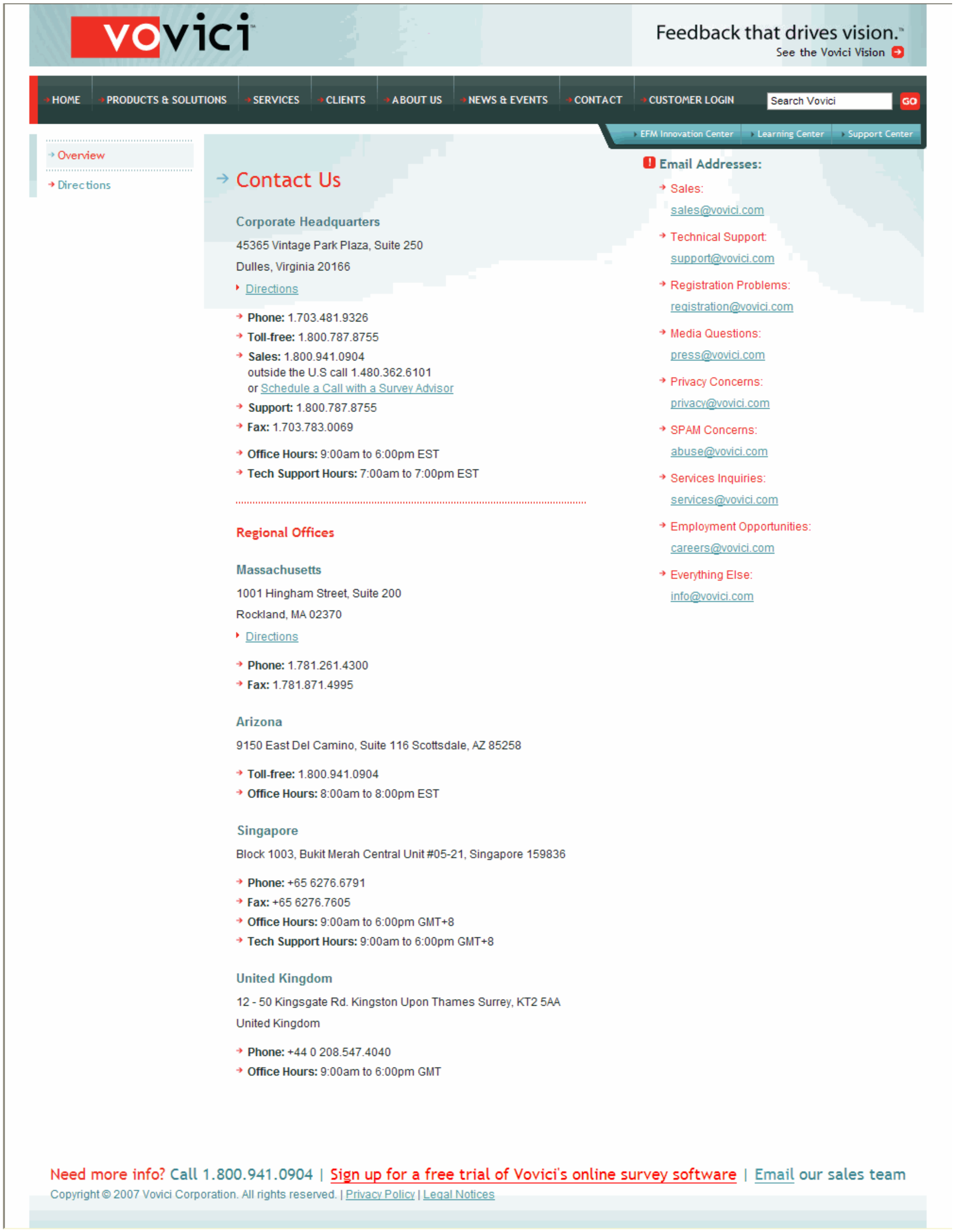
How do I set up permissions for a new role? Permissions for a new role are specified when you create a new role. Select **Create Role** from the Group Roles tab and simply select the check boxes for the desired permissions.

Can I edit permissions on a role that is already created? You can edit the permissions on an existing role if it is not a default role.

How do I remove a role? All the roles are listed on the **Group Roles** tab. Select the check box of the role you want to remove and click the **Remove** icon.

How do I see a listing of all my users and their assigned roles? Go to the **Report Users** tab under the **Administration Home Page** to see a list of all your users and their assigned roles.

Contact Us


vovici
Feedback that drives vision.™
See the Vovici Vision
HOME
PRODUCTS & SOLUTIONS
SERVICES
CLIENTS
ABOUT US
NEWS & EVENTS
CONTACT
CUSTOMER LOGIN
Search Vovici
GO
EFM Innovation Center
Learning Center
Support Center
Overview
Directions
Contact Us
Corporate Headquarters
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Phone: 1.703.481.9326
Toll-free: 1.800.787.8755
Sales: 1.800.941.0904
outside the U.S call 1.480.362.6101
or Schedule a Call with a Survey Advisor
Support: 1.800.787.8755
Fax: 1.703.783.0069
Office Hours: 9:00am to 6:00pm EST
Tech Support Hours: 7:00am to 7:00pm EST
Regional Offices
Massachusetts
1001 Hingham Street, Suite 200
Rockland, MA 02370
Directions
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Glossary

A

Analysis text: An abbreviated version of the question text to enable complete display on an analysis graph without truncating.

API: Application Programming Interface

B

Base count: The total number of recipients in your mailing list.

Bounce count: The number of E-mails that were not successfully delivered to recipients in your mailing list.

C

Campaign: The mechanism that associates your survey with your mailing list. It is where you create the message text that will be sent to the recipients in your mailing list inviting them to take part in your survey.

Click count: The number of recipients who clicked on the survey URL.

Closing text: Text that shows at the end of your survey just above the Submit button. Generally used to thank respondents for taking the survey.

Cluster report: Uses a specific question in your survey to base the report on and then sets a filter for every unique response option for that question in your data. Reports for each response option are produced as links.

Conditional logic: Logic is set up through a page break. The user is branched forward in the survey to a particular location based on the answer(s) to previous question(s).

Conditional page break: The mechanism used for defining conditional logic. This is a question type that is first added to your survey then your branching logic is added.

Cross tabulation: In Analysis, this is the ability to compare two questions to each other and evaluate relationships between the responses of those questions.

CSV file: Comma Separated Values file used to import data into a mailing list. Usually created and saved from Excel application.

D

Data piping: Passing the value of a response to a survey question forward in the survey to be displayed in another location.

Display template: Predefined HTML template that controls the display of your survey.

E

Executive summary: Comments or summary text that can be entered in Analysis to be displayed in your report.

Export data: Download the survey data from the application into a CSV (Comma Separated Values) file or a file compatible with SPSS (Statistical Package for the Social Sciences).

Export text: An abbreviated text version of a question or response option that is used in the export data process to avoid truncation of lengthy text.

F

Field mapping: A method to associate values in a mailing list and campaign. In a mailing list, field mapping ensures the data is imported into the proper columns. In a campaign, data in the mailing list is associated with certain fields in the survey to ensure values from the mailing list will be displayed in the survey results.

Filter data: Set a conditional filter against your survey results so that you view a specified subset of your data.

Follow Up campaign: A campaign that sends a message to everyone in your mailing list. This might be used to provide additional information or corrections after the initial campaign has been sent.

G

Gateway survey: A gateway survey has a login page so that you can restrict access to your survey. Login values are validated against the data in your mailing list.

H

Hidden field: A question type that is added at the top of your survey. The hidden field is a variable that is used to collect data values from your mailing list so that respondents do not have to enter those values in the survey.

HTML: (HyperText Markup Language) Programming code that is used to markup pages for display on the Web.

Hyperlink: Any standard HTML link that you click on to view an image or a Web site.

I

Image Manager: An icon on the Question Editing Tool Bar that enables you to browse, select or upload images into your survey.

M

Mailing list: The list that contains all the recipients E-mail addresses and other related information that is used to send your survey invitations out.

Mean: A statistical calculation that is the average value. It is the sum of the values divided by the total number of values.

Median: A statistical calculation that is the middle value. The median is the number in the middle of a set of numbers; that is, half the numbers have values that are greater than the median, and half have values that are less.

Mode: A statistical calculation - the mode is the most frequently occurring value.

O

Opening text: Introductory text that is displayed at the beginning of your survey. It is usually used to welcome respondents and provide instructions or information about the survey.

P

Page Break Wizard: A tool that enables you to automatically insert simple page breaks at equal intervals throughout your survey.

Permissions: Settings for actions or abilities that are specified by an Administrator that control what accesses you have in the application.

Persistence: The ability to resume a survey on the page where you left off and have your previous responses stored in the event that you could not complete the survey in one sitting.

Piped field: A response value that is passed through a variable from one survey question to be displayed at another location in the survey.

Poll: A tool that allows you to post a single question with up to 10 response options on your Web site. It is best used for quick simple queries when you need immediate feedback.

Post-Field text: User-defined text that will display after the text box in the item.

Pre-Field text: User-defined text that will display before the text box in the item.

Preview: The ability to view an individual question or an entire survey to see how it will be displayed before it is deployed to your survey audience.

Progress bar: A real-time status bar in your survey that provides information to the user on how much of the survey has been completed. It can be expressed as 'page x of x' or as a percentage complete.

Public report: A report option in the application that creates your report and produces a URL to access the report for users outside the application.

Publish survey: Publishing your survey permanently saves your changes and produces the URL to be used to access the survey that you will provide to your survey respondents.

Purge results: The act of deleting your survey data. This option deletes ALL survey results.

Q

Question library: Contains predefined questions with response options in various categories that can be selected and imported into your survey.

R

Raw data: The actual responses submitted by your survey respondents. Raw data can be viewed and temporarily edited.

Recipient filter: A user-defined filter on your mailing list so that only a specified portion of the list receives E-mail invitations to take your survey.

Redirect URL: A web address that can be entered under Title, Text & Limits that will send the user to the specified address when they submit your survey.

Reminder campaign: A campaign that sends a message to everyone in your mailing list that has not yet submitted your survey.

Report template: Predefined HTML template that controls the display of your report.

Republish: Republishing updates your published survey with any changes you have made since the last publish. Changes are initially contained in a working version of the survey until it is republished.

Reset results: When you analyze your survey data, you are working with a local copy of the data rather than accessing the database on the server directly. Selecting Reset Results clears your local copy of the data and sets your results count to zero (0).

Response library: Contains predefined response options in various categories that can be selected and imported into your survey question.

Response option: A possible answer option that is defined for a particular question in your survey.

Role: Roles determine what actions a particular user can perform with the application. For example, if your role is Survey Author, you can create but not publish surveys. Roles are managed by a Group Administrator.

S

Sampling rate: Sampling is used in campaigns to enable you to send to your entire mailing list (100% sampling), or to a random percentage sampling of your list. Example: If you select a sampling rate of 25%, the application will send the campaign invitation to a random 25% of your mailing list.

Seat: A slot (subaccount) under an account that entitles the user to access the account. A seat is assigned a specific role and permissions within the account.

Shared poll: A shared poll is a predefined poll that includes votes taken from your Web site, as well as votes from other Web sites that are using that shared poll, giving you a larger base of respondents for your results.

Simple page break: A question type that is added to your survey to create a new page (screen). A simple page break has a specified action but is not based on a specific answer to a previous question.

SSL: SSL is an acronym for Secure Sockets Layer. Publishing your survey with SSL enabled provides additional security and data encryption.

Standard deviation: The standard deviation is a measure of how widely values are dispersed from the average value (the mean). The standard deviation is the square root of the sum of the squares of the difference in each value from the mean divided by the total number of responses.

Step value: Step value is accessed through the Number option on numeric value defined questions. The Step Value plots each response point within the numeric range that is defined for the question. A larger step value can be assigned for questions with a larger numeric range to make analysis more efficient.

Subaccount: Synonymous with "Seat".

Submit count: The number of recipients in your mailing list that submitted your survey.

Success count: The number of addresses in your mailing list that were successfully delivered.

Survey Detail Report: A summary report of the settings and parameters contained in your survey.

Survey history: A archived list of actions that have been taken against the selected survey.

Survey URL: (Uniform Resource Locator) This is the link to your survey that is produced by the application through the publish process.

T

Text mask: A user-defined format that requires responses for that field to be in the designated format.

Thank You campaign: A campaign that sends a message to everyone who has submitted your survey.

U

UDF field: User Defined Field that is utilized in an E-mail campaign to pass in data values from your mailing list to personalize your message.

Unsubscribe recipients: This option applies a text file containing E-mail addresses that you want to remove from your mailing list and deletes the E-mail addresses from your mailing list.

Update results: Downloads results from the server into the application for analysis. The option will download any new responses that have been received since the last Update Results.

W

WSB number: Vovici Internal ID Number (Question/Response Options).

WSX file: The actual survey file (.wsx) produced from the legacy desktop version of the application.

Index

About Vovici

Vovici is the leading provider of Enterprise Feedback Management (EFM) solutions, online survey software and research services to decision makers in the enterprise, research and government markets. As a leader and visionary in the EFM space, the company offers innovative solutions and a clear consistent path to EFM adoption. Organizations worldwide rely on Vovici to help them better identify employee, customer and partner needs and act on that information in order to create long-term relationships, increase profitability and facilitate time-critical actions that drive business results. Vovici has been named to the Inc. 500, Software Magazine's Software 500, Deloitte Fast 500 and Deloitte Fast 50. The company operates in five countries, with a customer base that includes more than half of the Fortune 500. Visit http://www.vovici.com for more information.

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