SelectSurvey.NET Training Manual

This document is intended to be a simple visual guide for non-technical users to help with basic survey creation, management and deployment.

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ClassApps.com
Getting Started with SelectSurvey

The first part of this document outlines many of the different features included in SelectSurvey.NET.

Basic Survey Administration Features:

- Robust administrative console for managing surveys
- Ability to create surveys by copying existing surveys
- Ability to copy entire individual pages within a survey
- Ability to create questions by copying existing questions from the same survey
- Ability to create questions by copying questions from any survey owned by the current user
- Specify title for each survey
- Ability to add titles to each page in a survey
- Ability to add introductions to each page in a survey
- Specify start and end dates
- Unlimited number of questions per survey
- Unlimited number of answers per question
- Option for single-page or multiple-page surveys
- Ability to close and open surveys anytime
- Ability to organize surveys into folders with ownership

- Ability to group users into User Groups
- Ability to restrict respondents by User Group
- Text Replacement Tokens for anywhere in survey
- Ability to specify logo path in admin interface

Advanced Survey Administration Features:

- Unlimited question libraries for reusable questions
- Optionally display page numbers at the top of each page
- Ability to move items to any other location within a survey
- Ability to move entire pages to any other location within a survey
- Display progress using a customizable progress bar
- Display progress in terms of total page (e.g. Page 3 of 4)

Survey Look and Feel Features:

- Easily updateable look and feel for entire application
- Ability to specify HTML for header and footer
- Create unlimited, advanced look and feel templates
- Ability to add logos to any survey
- Ability to specify font family, weight, size, and color for all survey text
- Ability to specify all colors displayed on any survey
- Ability to optionally display a border on each survey
- Ability to set buttons or text for survey navigation
- Ability to specify survey alignment within browser

Survey Completion Action Features:

- Specify any action or message when a user completes a survey
- Display a custom message upon survey completion
- Redirect to any URL upon survey completion

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Reporting Features:

- Ability to filter report results based on date ranges
- Robust functionality for sharing results via email to any number of email addresses
- Ability to filter report results based on answers to questions
- Ability to filter report results based on user attributes
- CSV/Excel data export in raw data format
- CSV/Excel data export with individual user responses on each row
- CSV/Excel data export in an SPSS compliant format
- Scored surveys
- Email list information is displayed on detail report for responses to email messages
- All hidden field data is displayed on detail report
- Optionally highlight a user's own responses on the overview report
- Role-based security for viewing reports
- Owners can modify any response
- Questions can be given aliases for more concise reporting
- Graphical reporting with bar graphs
- Ability to filter reports to display entire survey, a single page, or a single question
- Reports display the number of respondents that skipped each question
- Summary report of all responses

Security Features:

- Ability to grant survey ownership to other users
- 7 distinct security levels
- Ability for administrators to manually enter unlimited survey responses
- Ability to limit respondents to specific IP address ranges
- Specify whether or not each response is updateable
- Optionally allow anonymous users to take a survey
- Option for single or multiple responses per user
- Require login before taking survey
- 3 levels of report security
- Option for each survey to make results public
- Option for each survey to make results semi-private
- Option for each survey to limit reports to survey owner(s)
- SQL injection protection
- Ability to encrypt connection string in web.config
- Ability to restrict login to only authenticated users
- Active Directory (AD) / LDAP integration (optional)
• Option for UPN login with Active Directory email address
• Ability to use AD and still gather anonymous responses
• Application uses forms authentication

Questions Features:
• 14 standard question types
• 7 advanced question types (including matrix, constant sum, ranking, and more)
• 3 hidden field question types (querystring, session, and cookie)
• Answer piping (including prior answers in the text of a question)
• Ability to optionally display answers in random order
• Optionally require an answer for any question
• Ability to specify a default value for any question
• Ability to specify minimum and maximum answer values
• Require valid email address format for text questions
• Ability to set the maximum number of characters that can be entered for each question
• Ability to select from predefined sets of answers for many question types
• Ability to specify column widths and layout for matrix questions
• Answer piping into matrix columns and rows

Question Types:
• Matrix - One Answer per Row (Option Buttons)
• Matrix - Multiple Answers per Row (Checkboxes)
• Matrix - Multiple Answers per Row (Textboxes)
• Matrix - Rating Scale (Numeric)
• Constant Sum
• Ranking
• Open Ended - One or More Lines
• Date
• Heading
• Horizontal Rule - HR
• HTML
• Image
• Message

• Multiple Answers - Checkboxes
• Number
• One Answer - Drop Down
• One Answer - Option Buttons
• Open Ended - Comments Box
• Open Ended - Comments Box with Rich Text Editor
• Open Ended - One Line
• True/False
• Yes/No
• Registration Question
• Calculated Question (calculates value from other question answers)
• Matrix Combo Flex (drop down)
• Respondent File Upload
• Dynamic SQL token
• Movie, Audio

Page Conditions:
• Ability to set page conditions on each page
• Assign multiple conditions per page
• Ten distinct logical operators for creating page conditions
• Group conditions to create powerful AND/OR logic
• Unlimited number of page condition groups
• Skip to Page Condition
• Skip to End Page Condition

Page Condition Operators:
• Greater Than
• Less Than
• Greater Than or Equal To
• Less Than or Equal To
• Equals
• Not Equal
• Contains
• Does Not Contain
• Provided an Answer
• Did Not Provide an Answer

User Management:
• Robust user management console for administrators
• Bulk upload of users
• 3 custom data fields per user
• Ability to create unlimited users
• Ability to create, modify, and delete users
• Ability to set security levels for all users
• Ability for each user to modify their account information
• Ability to automatically synch user data with Active Directory
• Ability to group users into User Groups
• Ability to restrict surveys to User Groups
• Import users from another database

• Support for sending emails via the .NET email library
• Support for sending automatic email to respondent when survey is completed.
• Respondent can print their survey responses after survey completion.
• Option for respondent to return to survey and complete unfinished pages at a later date.
• Kiosk Mode that contains list of surveys perfect for a convention or exhibition.

Survey Deployment:
• Standard functionality for sending email invitations
• Advanced, robust functionality for sending email invitations
• Create and manage unlimited email lists
• Advanced email address list management
• Ability to send email messages to both email lists and registered users
• Ability to send follow-up emails to recipients of an email message based on response status
• Ability to export email lists
• Ability to view and track response history to all sent email messages
• Ability to send email messages to a filtered subset of any email list
• Ability for users to click on a link to decline a survey invitation
• Ability to send email invitations in standard text format

• Ability to send email invitations in HTML format
• Easily create an email link for any survey
• Cut and paste option for web page links for any survey

• Cut and paste option for popup survey link for any survey
• Support for sending emails
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1. Create a Survey from Scratch

You will have to create your first survey from scratch. Once you have a survey created you can use it to create more surveys. Go to the link provided by your company or organization to login. You should see a page that looks similar to the image below.

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

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

When you are ready to begin, click Create New Survey.
(1) Enter a title for your survey
(2) Select From Scratch
(3) Click Save

Click Insert to add your first question.

Select the type of question.
2. Choose Question Type

The steps that follow will vary based on the type of question you chose. There are 21 different question types. For instance, here we chose One Answer (Option Buttons):

- Type the question in the box.
- Select whether an answer is Required.
- Select Horizontal or Vertical Alignment of the answer choices.
- Enter the Answers here.
- Select a Default, if desired.
- For scored surveys, select a Point Value.
- Do you want to allow the user to enter an additional answer?
- Click Save.
3. Modify Survey

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

Optional) Click Edit Page Properties to add a Page Title or Page Introduction.

For instance, this page shows the first page with a Page Introduction and no Page Title.

Excel Skills Assessment [edit]

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

[No Title Entered]

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

1. What version of Excel are you using?*

   - Excel 2003
   - Excel 2007

Click on the "Insert" button to add an item here.
Click on the "New Pg" button to add an item here on a new page.
4. **Insert a New Question or a New Page**

Your survey can contain an unlimited number of questions distributed amongst any number of pages. You can also copy existing items and then edit them.

- **Click Insert** to insert a new question.
- **Click New Pg** to insert a new page.

[Excel Skills Assessment][edit]

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

[No Title Entered]

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

- **edit**
- **page**
- **properties**
- **copy**
- **page**
- **delete**

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

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

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

- **Click Edit** to edit an existing question.
- **Click Delete** if you decide that you don’t want this question anymore.
- **Click Copy** to copy the question, then you can edit it to save time.
- **Click Move** to change the order of the question.
- **Click Pipe** if you’d like to display the question answer in the text of questions on subsequent pages.
5. Add Page Conditions

Before you begin...remember this:
- Plan ahead and insert all of your pages and questions first
- Page conditions cannot be set for Page 1
- There's a Page Conditions button for each page that you insert after Page 1
- You are setting the page conditions on the page that you want displayed. Essentially you are saying "only display this page if the following conditions are met".

In the following example the scenario is this:
- On page 1 there's a question "What is your favorite color?"
- On page 2 are the questions for people who answered Red
- On page 3 are the questions for people who answered Yellow
- On page 4 are more questions for everyone
- The end of the survey is just the page that says "Thank you for completing this survey...."
Click the **Page Conditions** button for page 2 (Red):

1. First, select the conditions here. This is determining to “only display this page if the person’s answer to this question equals this.”

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

You can repeat the same process for Page 3, by selecting **Page Conditions** and editing and saving like Page 2 in the example above. If those are all of the answers that need conditions, then don’t set any Page Conditions for Page 4 so everyone will automatically be taken to that page.
6. **Preview Your Survey**
   
   Click *Preview* to see how the survey will actually appear to the users.

7. **Set Survey Options**
   
   Before you deploy your survey you must select the *Survey Options*. These include:
   
   - Change the *Status* from open to close
   - Set the *Start/End Date*
   - Choose the *Respondent Access Level* - Do you want to require that the respondent log in or do you want to allow anonymous access? Do you want the person to be able to respond only once or can they respond more than once? Do you want to allow someone to return to an incomplete survey so that they can finish it?
   - Set the *Completion Action* and *Completion Message/URL*
   - Show *progress*
   - Indicate who to send the *Responses* to
   - Choose *Navigation* buttons
   - *Numbering* options
   - *Report* format
   - Indicate survey *Owners* *(If you make someone else an owner of your survey they can edit and delete it)*
You can get to the Survey Options page by clicking the **Edit** button next to the survey title when you are in **Design mode**.

Or by clicking the **Options** button on the **Manage Surveys** page.
8. Deploy Your Survey

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

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

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

```
Deploy 'Test Matrix Questions' Survey

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

| Email Lists |
| Did my survey ID change? |

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


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

**Web Page Link**
To embed a link to your survey in a web page, copy the link below and paste it into your web page in the desired location. You can change the name of the link in the text below.


**Popup Survey Invitation Link**
To embed a link in a web page that creates a popup to the survey, copy the link below and paste it into your web page in the desired location. You can change the name of the link in the text below.

9. Monitor the Responses

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

Click **Analyze** at any time to see an overview of the results:
10. **Print or Export Data**

Click **Print Overview** to print the Results overview.

Click **Individual Responses** to scroll through each individual response. You can also print individual responses.
Click **Export Data** to export the data to CSV (Excel) or XML format.

- **Choose the Export Format, Data Format and Response/User Data**
- If this is a “scored” survey you can include the sum and point values
- **Click Export**

### Export Data for Survey 'MA's survey'

This page exports data in CSV (Excel) or XML format for the selected survey. Standard question and answer data is always exported for each report. To export, first select an export format. Next, select a data format. Then, optionally, select additional fields of response and/or user data.

#### Export Encoding
- Western European (Windows)

#### Export Format
- **CSV (Excel)**: Export data to CSV (Excel) Format. This allows for easy opening and editing using Microsoft Excel.
- **XML**: Export data to XML. This format is commonly used by data reporting applications such as Crystal Reports.

#### Data Format
- **User Responses**: Export each user's response as a row, with one column per question.
  - **Show (No Answer Entered)** instead of blank: (User Responses only)
- **Individual Responses**: Export each answer as a row, with multiple rows for multiselect questions.
- **SPSS Format Extended**: Export each response as rows, one column per possible answer to each question.
- **SPSS Format Condensed**: Condensed single option answers, selected options as '1' or '0'.

**Note:** The question 'alias' (if one is assigned) will export as the column/question identifier.

**Note:** Remove empty responses if desired, in admin tools using the 'database validation tool'.

**Note:** If respondent does browser without answering any questions the entire response is counted in "total count".

### Response Data
- **Username**
- **IP Address**
- **Date Started**
- **Time Started**
- **Date Completed**
- **Time Completed**
- **Completion Status**

### Scores for Assigned Points
- **Add Sum Total Column of Points per Response** (all exports except Individual Responses)
- **Export Assigned Point Values Instead of Text Answers** (all exports except Individual Responses)

### User Data
- **First Name**
- **Last Name**
- **Email Address**
11. Reports

The **Reports Menu** includes User/Respondent Reports, Survey Reports and Multi-Survey Reports. You can also create your own **Custom Reports**.

Click **Create New Custom Report**
1. Select the survey
2. Enter a name for the report
3. Click **Save**

![Custom Report Configurator](image)

Click the Report name to view the report in your browser

![Custom Reports](image)
12. **Share the Results with Others**

If you intend to share the results with others you must enable this feature first and then create a report share list.

Click **Analyze** on the Manage Surveys page

Click **Share Results**

Click **Enable**

Click **Create New Report Share**
• Enter the **email addresses** of the people that you’d like to share the results with
• Choose whether you want to share just the **Overview** or the **Overview and Individual Responses**
• Select the other options that you’d like to give them
• Click **Save**

Click the **Send** button
Complete the message details
Click Send
13. **Keep a Library of Questions**

You can create questions and keep them in a “Library” so that you can use them over and over again.

1. Click **Libraries**
2. Click **Create New Library**
3. Name the Library
4. Insert all of the questions that you’d like to include in this library

Now, when you are designing a survey click **Insert From Library** to select the question from the Library.
14. **Organize Your Surveys into Folders**

If you have a long list of surveys placing them into folders will help you stay organized.

From the Manage Surveys page click **Manage Folders**

Click **Create New Folder**

![Create New Folder](image-url)
1. Enter the **Folder Name**
2. Click **Save**

Click **Save** again.

**To add surveys to your new folder:**
- Click **Manage Folders**. You will see a list of your surveys.
- Click the dropdown arrow next to the survey and select the folder to store it in.
To access all surveys in a folder:

- From the Manage Surveys page click the dropdown arrow in the Browse Survey Folders field and select the folder
- Click Go

15. Logout

Remember to click Logout when you are finished.