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I - INTRODUCTION

Key Survey Solutions software is built for business, interfaced for the user and engineered for IT; it delivers a powerful, easy-to-deploy system for data gathering, evaluation and presentation that enables users, workgroups and even remote divisions to create accounts and collaborate on projects in a user-friendly, controlled and secure environment.

Key Survey features a user-friendly interface to serve the needs of everyone in your company. There’s no software to install or download – all you need to use Key Survey is access to a browser.

You have total control over collected results. You can create and customize reports in real-time using any browser, display results in both text or graphic format - even export data to Excel, Powerpoint, SPSS, or other programs.

Key Survey software is built to scale. It can handle any number of users. Any volume of emails. Any quantity of surveys. Use it to make any kind of form, application, or online test for training or assessment purposes. It’s designed to meet your survey demands today, and grow with your company.

Key Survey may be hosted on our secure servers or yours as an Enterprise Solution, or delivered fully configured and pre-loaded on a standalone server. Data is completely safe whether stored on your server or ours. Key Survey offers the option of using secure SSL encryption. Administrative controls allow you to define and restrict employee access rights.

Key Survey puts the administrator in complete control of all survey and form creation and deployment. The master administrator can create unlimited sub accounts and define access levels for all users.

Moving data across your enterprise is no problem for Key Survey Enterprise. It gives you the flexibility to pre-populate surveys, employ an API, and export data to other major applications like Excel, Powerpoint, or SPSS, or as a CSV file. It also prints to PDF for hard copy purposes.
How this Manual is Organized

The manual is divided into 9 sections (in addition to the Introduction). These sections follow a logical sequence – creating a survey, distributing a survey, how to generate and use survey reports for both regular and 360 surveys. In the last section you will learn how to setup additional options such as Contact Manager and how to manage users if your account is a multi-user licensed account.

Section II – Creating a Survey
• This section walks you through creating a survey, from start to finish, using our easy six-step process. Included are designing a survey from scratch, designing a survey from a survey template, designing a survey by editing an existing survey and designing a common-password survey.
• Additionally, you will learn how to customize your survey, add and edit survey rules and questions, optional question features and advanced editing options.
• Lastly, you are provided with instructions on how to add logical transitions to your survey questions, application tags and many more advanced survey features.

Section III – Distributing a Survey
• This section walks you through launching your survey, emailing your survey, advanced launch features and provides you with information regarding our Education Package.

Section IV – Survey Reports
• This section of the document provides you with details regarding our powerful reporting tools and how to best utilize them.

Section V – Creating 360 Survey
• This section provides you with the step by step instructions for creating a 360 survey, its questions, adding subjects and participants. Most of the customizations are similar to the regular surveys, that is why you will be redirected to other sections of this manual if feature is already described.

Section VI – Distributing 360 Survey
• 360 survey distribution has its peculiarities and differs from the regular survey distribution. You will learn how to create email campaigns, campaign reminders and other distribution features.

Section VII – 360 Survey Reports
• 360 survey reports consist of two main parts: Participation Reports and 360 Survey Reports. From this section you will learn how to utilize both of them, how to create subjects and participants tables for analyzing collected data.

Section VIII – Account Setup
• This section walks you through the setup of Contact Manager and Portal.

Section IX – Administration
• Intended for accounts with a multi-user licence. Here you will learn how to manage your users and give out rights or assign restrictions.
II – CREATING A SURVEY

When creating a new survey, there are five options. You can select to design a survey by copying an existing survey, using survey templates, design a new survey by importing a file, create a survey from scratch (customizing all your questions and answer types) or design a pre-populated overlay survey. You can also create a survey fully compatible with WorldAPP Offline solution which.

Designing a Survey from scratch

Designing your survey is easy and straightforward; the Key Survey application walks you through a simple six-step process.

- Select Survey
- Survey Name
- Survey Questions
- Select Layout
- Survey Settings
- Test Survey

Step 1 – Selecting your Survey

1. Once logged in to the Key Survey, click the New button.

2. Click the ‘Survey’ option.

   ![Survey Selection](image)
3. Create a Survey Name that best describes your survey.

4. Create a Survey Title, which will appear at the top of the survey on each page. If the field is empty the survey name will be used instead.

5. Write a short Survey Introduction, which appears beneath the survey’s name, providing additional information about your survey.

6. To check for spelling errors in the text just entered, click Spell Check.

7. Once done, click Save.
Creating a Survey

All surveys you create are found on the **Surveys Home Page**:

- The Folders pane in the left keep your surveys structured by folders.
- The Surveys pane in the center lists all available surveys in the selected folder.
- The Survey Information pane in the right contains information and controls for the selected survey.

**Step 2 – Creating and Selecting your Survey Questions**

1. Click Edit button on the Survey Information pane and click **Insert** or **New Question** to begin adding questions to your survey.
2. By using the Insert button menu you can create a New Question, a section header, copy a question from an existing survey or from the Question Library. A reference on how to use the Question Library will be available further.

3. To create intuitive text section headings for your survey, choose Text for section heading and type your header text, comments or instructions in the ‘Write your question below’ text box.

4. Click the Preview button to view your survey as it is:

5. Once you have created a section header, begin adding questions. To copy questions from the Survey Library click Insert and select Copy from another survey on the dropdown menu.
6. Select the existing survey to copy questions from or use the 'Frequently asked questions' list within the Survey Library.

7. Click Copy to add questions.

8. Depending on the question type selected, the system prompts you with a screen to edit the existing question format and/or data or, you can save the question exactly as it is.
9. If you are editing, you can change the question text and labels to meet your needs, update the field formats, or create a custom format (custom formats are described further). Click **Save** when done.
10. Continue to add questions and section headings where appropriate. There are many Question Types to choose from. Use the **Example** link for clarification of any question type. Be sure to click **Save** after each question is added!

11. As you continue, you will see a summary of all the questions you have previously added:
12. Click the **Preview** button at any time to see what your survey looks like:
Step 3 – Selecting the Layout of your Survey

Once you have added your questions, you can further customize your survey by selecting the layout design elements.

1. Click the Layout button on the ribbon toolbar.

2. Click the Edit link beneath the Customized Layout thumbnail.

3. You can customize any survey element. Select a survey element from the left pane and apply any custom font style, weight, color, background color and other design properties.

See the Customizing your Survey Design section of this manual for further details and instructions.
4. You can customize the survey buttons by uploading your own, saved locally on your computer. Expand the **Buttons** area, use **Choose File** to locate your button image, double-click the file to select and click **Upload**.

5. Use the **CSS** Styles Layout option to apply further customization, using Cascading Style Sheets.
Step 4 – Designing your Survey Settings

Once you have customized your survey, you can define the settings that help drive your survey.

1. Click **Settings** button from the ribbon toolbar at the top.
2. Define what will happen if the respondent attempts to take the survey a second time.
3. Indicate whether to show the respondent the survey results once the survey is complete.
4. Supply a URL to redirect your respondents to another web page upon submitting the survey if necessary.
5. Select the language in which alert messages will display.
6. Choose whether you would like the respondents to see the Save and the Back button.
7. Specify if you would like to provide an automated transition to the next page when a radio button is selected.
8. Lastly, define whether question number should be shown in a survey.
Step 5 – Testing your Survey

The last step to creating a survey is testing the survey, testing the survey report and printing a report summary.

1. Click the arrow next to the Preview button on the ribbon toolbar at the top. Click Test Survey to take and submit your survey, exactly as your respondents will.

2. Fill out the survey with your test data and click Submit.

3. When prompted with the alert message, click OK. Close the browser window.


5. The Summary Report (which opens a new browser window) displays your survey results and response statistics, in a graphical format. Click the View button next to any label, to view the individual results for that field.

6. Click the Response Total number link, to view all the responses for that question.

7. Use the Export Graph link to export graphical results into a Power Point slide for presenting the findings.

8. When done reviewing the Summary Report, close the browser window.

The survey testing option will be described with greater detail in the further section of this manual.
Using a Question Library

The Question Library is your local storage of pre-defined questions. You can use this Library during survey creation as a method of adding questions. To access the Question Library follow the steps below:

1. Once logged in to the Key Survey, click the **New Survey** button or **Edit** button for any survey.
2. Click the **Insert** dropdown or an arrow next to the **New Question** button on the ribbon toolbar and select **Question form Question Library** option.

The Question Library consists of three panes – tree of categories on a left, list of questions in a middle and selected questions on a right. The tree has a number of categories created by default and you can easily create your own custom categories with questions for later use. To create a custom category click the **Add button** (1) on the left, name it (2) and click **OK** (3).

Once you have created custom category you can rename it (4), delete it (5) or create another one (1) clicking respective buttons on the top left.

Now you can start adding questions in this new category by creating them one by one or copying existing ones.
Creating a Survey

To copy question(s) from existing survey click on the arrow next to the New Question button and select From existing survey.

Select needed survey and check all the questions you would like to add. Once all questions are checked, click on Copy button on the bottom.

To create questions from scratch click on the New Question button in the middle pane or click on the Arrow next to this button and select From Scratch; proceed with usual question creation interface.

Questions you have created under custom categories could be added to your survey, previewed, edited or deleted. Questions under default categories could be only previewed and added to a survey.

To add questions from the middle pane to a survey you can use one of the four ways below:

- Click on the needed question and hit the green + sign on the right to the question text;
- Click on the needed question and then click the >> button between the middle and right panes;
- Drag and drop selected question to the right pane;
- Double-click on the needed question.

When all the question you would like to add to your survey are on the right pane you can preview or delete them altogether. To add them all click on the Add Selected Questions button on the bottom left.

NOTE: Custom categories you create cannot have the same names.
Designing a Survey by Copying an Existing one

1. Once logged in to the Key Survey, click the **New Survey** button.

2. Click the **Copy Existing Survey/Form** option.

3. When prompted to select an existing survey or form, select the appropriate one and click **Next**.
4. Use the steps outlined in the *Designing a Survey from Scratch* section to complete your survey, edit the questions or do further design customization.

Survey can also be copied using Copy button.

1. Once logged in to the Key Survey, click on the name of a survey you would like to copy.

2. Click the **Copy** button on the middle top.

3. You can now indicate whether you would like to copy reports or responses along with selected survey and change destination folder.

4. Use the steps outlined in the *Designing a Survey from Scratch* section to complete your survey, edit the questions or do further design customization.
Creating a Survey

Designing a Survey Using a Survey Template

1. Once logged in to the Key Survey, click the **New Survey** button.

2. Select the ‘**Use a Template**’ option.

3. Select a **Survey Category** and a template from within that category.

4. Click **Preview** to see the survey template questions or click **Next** to continue.

Use the steps outlined in the [Designing a Survey from Scratch](#) section to complete your survey, edit the questions or do further design customization.
Designing a Common-password Survey

Also called the Teacher/Student survey, this advanced feature allows you to create a teacher Profile Survey that is linked (through a shared, unique Profile Code) to multiple student surveys (Profile Records).

With this type of survey, only those respondents (students), who have the proper Profile Code (password), can take the survey.

This feature is only available if your subscription plan includes the Profile option.

Design a Profile Survey

When using a common-password survey, the first thing you need to do is to design a profile survey. This profile survey can then be linked to any other survey in your account.

1. Once logged in to the Key Survey, click the **New Survey** button.
2. Select the **Common-password Survey** option.

3. Name your survey and add a question that asks for profile information. Common-Password surveys may contain all question types except for 3D Matrix.
4. Continue with a standard design survey procedure.
Add Profile Records

Once created, the profile survey appears on your survey Home Page. You can now begin adding profile records.

There are two ways to add profile records to your survey:

- You can launch your survey in the standard way, and have respondents submit their information.
- You can add profile records manually.

To add profile records manually:

1. Select the profile survey from the Home page.
2. Click the Add profile records link from the Survey Information pane in the right. Fill in the Profile Information.

3. Click Submit.

Customize the automatically generated profile code if desired. This is the code respondents use to access the shared survey. Please note that profile code is case sensitive.

4. Click Save to save your changed profile code.
5. Click Cancel to use the default profile code.
Creating a Survey

When you have added profile records, you can manage them on the Common-Password Survey page:

1. Select the Show Details option to see details of profile records. If the option is not selected, you will see only the list of profile codes.
2. The Profile code column contains a unique combination of characters, which are used to link other surveys on your account, to this profile site. Click the profile code number to edit the code.
3. Click e to edit corresponding profile record.
4. Click X to delete corresponding profile record.

To link your profile survey to an existing survey on your account, navigate to the desired survey and go to the Edit Survey page:

1. Click the P icon.
2. Select a profile survey to link it with the current survey.
3. Create a question that prompts your respondents for the profile code when they click the survey link. Each time a respondent enters the correct profile code, a new profile record is added to the appropriate survey report.
4. Use the Hide option to designate which, if any, fields to hide from the respondents’ view.
NOTE: Certain fields, if not hidden, will allow respondents to see the question text of the profile survey and the data entered for the fields.

5. Click **Save** to save your settings and return to the **Edit Survey** page.

6. Click **Back** to go back to the **Edit Survey** page without saving your changes.
Creating a Survey

Customizing your Survey Design

Once you have created a survey, our survey design tools allow you to customize it.

Advanced design tools include:

- Using Media Library
- Adding and Previewing a Survey Logo
- Current Layout
- Styles
- Adding Custom Image Buttons
- CSS (Cascading Style Sheet) Editor
- Theme Library
Using a Media Library

Media Library is your local storage of files of any type. It was designed to make it easier for you to upload, save, access and use stored pictures any time needed.

Media Library can be opened in multiple ways. Each time when you are trying to upload image as a Logo for a survey, Add image for an answer option or click on Insert image on WYSIWYG editor Media Library would pop-up. Also, there is a general access to it under the My Account -> Media Library.

To upload file in the library click on the Upload button in the middle section (1), select needed file on your computer and click Open.

Once the file is uploaded, you can see its properties appearing on the information pane on a right (2) along with a file direct link (3). You can edit the file name there (4) or delete the whole file by clicking on the Delete button on the middle top (5).

In order to categorize files in the library you can create custom folders and group them in different folders by certain criteria. Use New, Rename and Delete button for respective actions with folders in a tree.

You are not limited in number of files that can be stored in Media library. Basically, the only limitation is Library size and size of a file that can be uploaded at once. You can find you Library parameters on the bottom left part of the screen (6).

**NOTE:** You cannot delete an image from Media library if it is used in any of your surveys.
Adding and Previewing a Survey Logo

Branding with your corporate logo gives your survey a professional feel. On the Edit Survey page click Add Logo.

1. Click Select Image (1) to locate the image file within your Media Library, click the image file and hit Ok to select it. If the image you would like to use is not in your Media Library yet, click Select Image, then Upload, locate the file on your computer, click Open and Ok.

2. Specify additional logo options such as mouse-over text (2), URL to redirect respondents to if they click the logo (3) etc.

3. You don’t need to use any external programs to resize the logo, but you can do it right here. Click on the right low logo corner and drag it to resize the image. You can also specify certain width and height so the image fits your survey perfectly.

4. Click Preview to see your survey color scheme with the attached logo.

5. Click Back to return to the Edit Survey page.

NOTE: you can use only .png, .jpg, .gif, .bmp images in RGB color mode.
**Current Layout**

Click **Layout** button from the ribbon toolbar on the **Edit Survey** page.

The survey **Layout** section contains **Categories** pane in the left and **Themes** pane in the right.

**Current Layout** is a quick and easy way to apply custom look and feel to your survey. All layout customizations will be applied to current survey only and will not be available from within another surveys of your account.

1. To edit current survey layout click the **Layout** link from the **Current Layout** category and click **Edit** (1) beneath the quick preview icon (thumbnail) from the **Layout** pane.

2. Customize **Styles**, **Buttons** and **CSS** of your survey. These options will be described in the next sub-sections.
Creating a Survey

**Styles**

You can set the format and colors for most survey elements using the color palette, font and alignment controls.

1. Select the element from the left and apply custom color, font or alignment from the right.
2. Click **Preview** to see how the real survey looks.
3. Click the **Apply** button to apply changes.
4. Click **Finish** to close the window or click **Next** to proceed with the survey buttons customization.
5. Click **Default** if you would like to discard customization made to the survey layout.
Buttons

To make your survey fully meet certain design specifications, you can upload custom survey navigation buttons.

- **Image buttons** are default survey buttons. They can be replaced with your own buttons instead.
- **HTML buttons** are commonly used if you want to customize default buttons text. For example, use the 'Finish' wording instead of 'Submit'.

To upload your own buttons:

1. Click the **Upload your own buttons** link to roll over the upload dialog.
2. Browse for the button files. You can upload .gif and .png files only.
3. Click the **Apply** button to save changes.
4. Click **Finish** to close the window or click **Next** to proceed to the CSS editor.
5. Click **Default** if you would like to discard customization made to the survey layout.
CSS Editor

CSS Editor allows you to edit survey CSS (Cascading Style Sheets) code. This requires additional knowledge of CSS, but allows you to perform advanced survey design customization.

1. Input new parameters into the **Layout format** field. You can edit the existing scheme using standard CSS parameters and/or add your own CSS style sheet directly into this editor.

   **NOTE:** For more information, please consult the **CSS Parameters** table following this sub-section.

2. Click the **Apply** button to save changes.

3. Click **Finish** to close the window or click **Next** to proceed to the CSS editor.

4. Click **Default** if you would like to discard customization made to the survey layout.
### CSS (Cascading Style Sheets) Parameters

Use your own Cascading Style Sheets (CSS) to apply a customized layout scheme and style to many elements of your survey. Styles define how to display HTML elements. Below you can find the parameters used in our application.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TABLEBKG</td>
<td>Table background</td>
</tr>
<tr>
<td>BACKGROUND</td>
<td>Button background</td>
</tr>
<tr>
<td>UPTABLE</td>
<td>Row of survey name - 'tr' parameter</td>
</tr>
<tr>
<td>H1</td>
<td>Survey name parameters - 'td' parameter</td>
</tr>
<tr>
<td>H10</td>
<td>Survey text description</td>
</tr>
<tr>
<td>H2</td>
<td>Question text parameters</td>
</tr>
<tr>
<td>H22</td>
<td>Text only (introduction and headings) parameters</td>
</tr>
<tr>
<td>H3</td>
<td>Answer text parameters</td>
</tr>
<tr>
<td>INPUT</td>
<td>Style of radio buttons and check boxes</td>
</tr>
<tr>
<td>H4</td>
<td>Answer text parameters for rank scale question type</td>
</tr>
<tr>
<td>H5</td>
<td>Answer text parameters for left column of ‘Compare One Against Another’ question type</td>
</tr>
<tr>
<td>H11</td>
<td>Word ‘or’ between left and right columns of ‘Compare One Against Another’ question type</td>
</tr>
<tr>
<td>H6</td>
<td>Answer text parameters for right column of ‘Compare One Against Another’ question type</td>
</tr>
<tr>
<td>ODD</td>
<td>Background of odd lines of answer text parameters</td>
</tr>
<tr>
<td>EVEN</td>
<td>Background of even lines of answer text parameters</td>
</tr>
<tr>
<td>ODD_BAR</td>
<td>Color of completed part of the survey progress bar</td>
</tr>
<tr>
<td>EVEN_BAR</td>
<td>Color of not completed part of the survey progress bar</td>
</tr>
<tr>
<td>HAND</td>
<td>Cursor parameters. <strong>Example:</strong> Hand {cursor: hand; border-style: none}</td>
</tr>
<tr>
<td>H23</td>
<td>Text ‘Page x of y’ parameters</td>
</tr>
<tr>
<td>H24</td>
<td>Print Preview Mode: respondent text parameters</td>
</tr>
<tr>
<td>H25</td>
<td>Total column in numeric allocation</td>
</tr>
</tbody>
</table>
**Theme Library**

A theme is comprised of a set of graphics and cascading style sheets (CSS) that control the styles, font, and other elements. Using ‘Theme Library’ feature you can create your own themes, organize them into categories or apply ready-made themes available for your account.

- **Standard Themes** and **New Themes** – these categories contain ready-made themes that can be applied to the survey. They already have colors, logo and other design elements applied. Just select the sub-category and click on the theme to apply it to the survey.

- **Custom Themes** category is a storage for custom themes you create yourself. Thus you can create your own templates and apply them to other surveys within your account or a workgroup.
Creating a Survey

To add new sub-categories to the **Custom Themes**:

1. Click on the **Custom Themes**->**All** list from the **Categories** pane.
2. Click the **New** button at the top.
3. Give a name to the new sub-category and confirm your changes.

Now you can move existing custom themes to this sub-category or create new themes within.

To create new custom theme follow these steps:

1. Click the **New Theme** button from the **Layout** pane.
2. Name new custom theme.
3. Select a sub-category to store new theme within the Custom Themes category. If none of the existing sub-categories meet your requirements, you can create new one right from here. Click the Add Category button for that.

4. Upload thumbnail image for new theme if necessary. This is commonly used to create small theme preview in the Layout pane. If no thumbnail is uploaded, default survey reduction will be used.

5. Click Next to proceed with theme creation.

6. Modify survey styles and colors by selecting element in the left and customizing its properties from the right tools pane.

7. Click Next to proceed.

8. Upload new navigation buttons so they correspond to the survey design.
9. Click **Next** to proceed to the CSS Editor and perform advanced design modifications using CSS.

10. Click the **Apply** button to save changes.

11. Click **Finish** to close the window and create new custom theme.

   ![Image showing CSS editor and theme settings]

   Click on the preview icon in the top right corner to preview the theme.

   ![Employee Review Survey preview]

   **NOTE:** If you apply a template theme or a custom theme to your survey, design modifications are applied to the current survey layout within the **Current Layout** category. If you want to slightly modify the survey look and feel without affecting existing themes, customize your survey layout from there.
Survey Settings Descriptions

Survey settings define the survey's behaviour when respondents open it: whether the respondents will be allowed to take a survey more than once, whether the respondents will be able to navigate back and forth within the survey and other properties.

Navigate to the survey Settings page from the ribbon toolbar:
1. Use this section to set the rules for respondents attempting to take the survey a second time.

- **Do not allow respondent back into survey** – Once a respondent submits the survey, this respondent would not be allowed to come back to this survey to change any responses. A returning respondent will receive a message thanking him for his participation in the survey.

- **Respondent may return and modify their response** – The respondent would not be allowed to come back to the survey and make changes to responses. The old responses will be deleted and replaced with the new ones.

- **Allow multiple responses** – only applies to Master URL. The number of respondents who can submit their surveys using the same link from the same computer is not limited.

**NOTE:** When responding to a survey from the same computer, your respondents must close the browser window after each time they have submitted a survey.

2. Use the **Survey progress indicator** section to select how you want respondents to see the progress they are making during the survey process. The progress is estimated according to the quantity of questions answered by respondent.

**NOTE:** This option is available only for surveys that contain more than one page.

3. Next you can indicate whether to show your respondents the results of the survey when the survey has been filled out. Check the **Show results to respondents** option so on submitting the survey respondents are shown the Report Summary.

4. The **Redirect Page** option redirects respondents to your website or any other page on the Web after they submit the survey. This is an optional feature. Enter your URL in the ‘Redirect Page’ text box. You can only use this option if you choose to not show the Report Summary to respondents.

5. Use the **Display alert messages in** section if your subscription plan includes the **Language** option. You can use this dropdown box to select the language displayed in the pop-up alerts.

6. Check the **Show save button** option to enable the **Save** button. The **Save** button allows your respondents to save their intermediate results and complete the rest of the survey later. This button is shown in a survey by default.

7. Check the **Show back button** option to enable the **Back** button. The **Back** button allows your respondents to return to previous pages and change their responses during survey completion. This button is shown in a survey by default.

**NOTE:** This option is available only for surveys that contain more than one page.

Do not check the ‘**Show back button**’ option if you do not want your survey takers to go back to previous pages.

Do not check the ‘**Show back button**’ option if you use logical transitions in your survey to make sure respondents do not mess their results.

8. Check the **Show question numbers in survey** box if you would like respective number to be shown next to each question in your survey.

9. **Survey Metadata** option is used for internal purposes only. It allows adding metadata to your survey such as survey administrators, etc. Survey metadata is displayed internally when viewing 360 Survey Statistics and Participation Reports for your 360 surveys. Consult further chapters for more details.
10. **Response Label** Specify Single-Line field in your form using Qx.Ay.Cz format to add a certain response data as submission markers for each response. This feature allows you to have additional classification of responses. For example, when multiple responses are submitted for the same form on Participant Portal, respondent would be able to see this markers within responses statistics and manage data much more effective.

11. Click **Save** to apply the changes made.

12. Click **Cancel** to discard edited parameters.

**ADDITIONAL NOTES:**

- If your survey has not been distributed via our email system, and either 'Do not allow respondent back into survey' or 'Respondent may return and modify their response' have been set, partially completed responses can be saved and included in reports.

- If your survey has not been distributed via our email system, and 'Allow multiple responses' has been set, partially completed responses (In Progress) can also be saved and included in the report.

- If your survey has been distributed via our email system, and one of the three rules has been set, partially completed responses can be saved and included in the report.

- While accessing the survey via Master URL, cookies are used to identify the respondents.

- While accessing the survey via Master URL – respondents must take 10-second pauses if submit:
  1. from the same computer;
  2. using Internet Explorer;
  3. several times in a row.
Creating a Survey

Editing Survey Questions

From the *Edit Survey* page of the survey you can add new questions, edit existing questions, move them, hide temporarily or delete them completely. You can also add or edit your *Thank You* page, *Internal Notes*, and/or a *Survey Header and Footer*. You can set any Multi-Lingual options or apply advanced features to your survey questions such as logic, randomization and many others.

1. Each regular survey can be linked with the Profile survey. This knot is used for giving access to the survey for particular respondents groups and then recognize each group. Click the *P* button next to the *Search* field to link this survey to a *Profile Survey* on your account. This adds a new question to the survey, asking respondents to enter a Profile Code. See the *Common-Password Survey* sub-section of this manual for further details and complete instructions on utilizing this feature.

2. The search option allows you to search for certain text throughout the survey as well as replace the text. Please refer to the *Search* sub-section.

3. You can add logo to your survey, click the *Add Logo* button at the top of the questions list for that. This can be your company logo or any other image.

4. Click *Insert* to add a new question to your survey, using quick menu.

5. You can split the survey into multiple pages. This is commonly used for surveys with a big number of questions and makes survey submitting process easier for respondents. Click *New Page* next to the certain question to insert the page break. If any survey data is moved automatically to the next page as a result of the logic transition applied, this check box will be activated and dimmed.
6. Pagination tab allows you to split questions list into several pages during editing survey. This feature will be described in further section.

7. The question number field indicates the number of the question within a survey. This field is editable. It allows you to change the order of your questions by entering the ordinal number in this field. Click the **Save Question Position** pop-up link to confirm changes and change question position.

8. Click **Preview** to preview a specific question.

9. Click **Edit** to make changes to a question or to responses. If you already have responses to this survey, then you should only edit the question or answers in order to make them clearer or if there is a typographical error, otherwise you will invalidate your results. If you have not launched your survey, or there are no responses yet, you can edit question and answers in any way you want.

10. In order to preview the complete list of answer options to a question which contains more than 10 you should click the **Show All** link.

11. Click the **Logic** button to apply logic transitions to any question. See the **Skip Logic**, **Branch Logic**, **Branch on Range** and **Advanced Logic** sections of this manual for further details and complete instructions on utilizing these features.

   **NOTE:** Logical transitions and email alerts are graphically depicted next to the questions or responses they are set to.
   - Click the ‘number’ to get to the question setup with the logic.
   - An envelope denotes an **Email Alert** to the survey owner is set and an envelope with a clip means that an Email Alert to the respondent is applied.

12. You can alert survey respondents, yourself or any third party with the notification email if certain answer or set of answers were chosen by respondent. Click the Actions button to compose such notifications. See the **Email Alert** section of this manual for further details and complete instructions on utilizing these features.

13. Click **Add Image** to add an image to your question. This option will be described later in this section.

14. Click **Copy** to copy a specific question within a survey. Just indicate question position within a survey and click **Save**.
Creating a Survey

15. Click X to delete a specific question from the survey. If there are some responses to a question, you are not allowed to delete it. Please use the Hide option for that.

16. Select the following options to set a question mandatory or otherwise:

- Must Answer – Makes the question mandatory to answer and does not allow respondents to move forward or submit the survey until they answer that question.
- Allow to skip – Respondents can skip such questions without any notifications or warnings.
- Skip with alert – Respondents will be prompted with an alert but still will be able to skip the question.
- Conditional Must Answer – This option allows you to make question mandatory depending on the answers given to the previous questions. Use the Qx.Ay notation to create a condition, where x is a question number and y is answer choice number within a question. For example: Q2.A3 means that respondent will not be able to skip the following question if third answer choice in question two has been chosen.
- Mandatory answer options – Makes only certain answer choices within a question mandatory to answer. You can apply this option to the following types of question: Rate Different Items, 3D Matrix, Single Line Text.
- Must answer all fields – is used to make all items within the 3D Matrix type of question mandatory to answer.

17. Select the Hide option to hide a specific question from respondent’s view. Hidden questions are commonly used to pre-populate some data for each respondent and then use it for internal purposes.

18. Click the Randomize option on the ribbon toolbar if you want the questions to be displayed in random order. Use these options to set the order of the questions:

- Select ‘Randomize All Questions’ if you want the order of all questions to be random.

  NOTE: The questions marked as ‘Must answer’ and ‘Section Header’ question types are not randomized. They are placed at the beginning of the survey and their order is the same as in your question list.

- Select ‘Randomize for pop-up show N questions each time’ if you want to display a certain number of questions, randomly chosen from your list.

  NOTE: The questions marked as ‘Must answer’ and ‘Section Header’ question types are not displayed in any case. They are placed at the beginning of the survey and their order is the same as in your question list.

You can also randomize questions and question sections by means of Key Survey Plugins. Please refer to the Plugins User Manual available from the online Help file.
Under the **Messages** section on the ribbon toolbar you can find the following options:

1. **Internal Notes** are used to comment on the survey results (of respondents) if necessary. For more information, see the **Internal Notes** section of this manual.

2. **Thank You** page thanks respondents and is displayed upon submitting the survey. For more information, see the **Thank You Page** section of this manual.

3. Click **Welcome Back** page button to customize 'Welcome Back' message when respondents come back to their surveys for the second time.

4. You can add **Header** and **Footer** to the survey. They will be displayed on each survey page. Click the **Survey Header and Footer** button on the ribbon toolbar to work on these sections.

5. It is possible to insert custom Javascript coding into your survey to add some special functionality and interactivity. If you have Javascript code already composed, click on the **Scripts** button on the ribbon toolbar and either paste the program body to the bottom box or type a link to it into the top field. **Note** if this option is not visible in your surveys or forms, your account probably does not have JavaScript option activated. In this case, please contact your account representative or our Support team to request it enabled for you.

6. Click the **Multi-Lingual** button to launch the same survey in different languages. For more information, see the **Multilingual Survey** section of this manual.

7. Click **Preview** to see your progress and to test the functionality of your survey.

8. **Print** button allows you to save the survey in either color or black and white PDF on your computer for printing.

9. **Layout**, **Settings** and **Launch** buttons provide an access to respective features that will be described further in this manual.
Survey Question Types

Key Survey allows you to use the following question types:

- Section Header (text only)
- Pick One or ‘Other’
- Pick One with ‘Comment’
- Check All That Apply
- Dropdown Box
- List Box
- Single Line Text with Pre-Format Options
- Multi-line Text Response – Often used for comments
- Rate Different Items Along the Scale of Your Choice
- Compare One Against Another
- 3D Matrix
- Numeric Allocation
- Object Lookup
- Multiple Object Lookup
- File Upload
Section Header (text only)

Divide your survey into intuitive sections, write an introduction or give additional descriptions and instructions using this text only feature.

This question type allows you to identify the most important sections in your survey for the respondents.

1. Use the 'Please select a question type' dropdown box to select Section header (text only).
2. Click Example to see examples of this question.
3. Type your section header text, comments or instructions in the 'Write your question below' text box.
4. Click Spell Check to check the spelling.
5. Click Preview to see what your question looks like.
6. Click Save to save your changes and go to the Edit Survey page.
7. Click Cancel to go back to the Edit Survey page, without saving changes.

Pick One or ‘Other’
Provide respondents with the ability to select one from a few answer choices, including the option to provide an ‘Other’ text field, where respondents can type their answer in. Questions of this type are good for yes/no answers, as well as selecting a favorite or rating something between ‘Good’, ‘OK’ and ‘Bad’.

1. Use the ‘Please select a question type’ dropdown box to select Pick one or ‘other’.
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box.

4. **Answers input modes** will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices up and down the list.

6. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

7. Select the Other option to create a new line for users to enter their own answers.

8. Click New Line to add a new answer line if needed.

9. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).

10. Use the ‘Select answer layout’ radio buttons to show the answers horizontally (‘Across’) or vertically (‘Down’).

11. Click **Spell Check** to check the spelling.

12. Click **Preview** to see what your question looks like.

13. Click **Save** to save your changes and go to the *Edit Survey* page.

‘Pick one or ‘other’’ question type preview:
Pick One with ‘Comment’

Provide respondents with the ability to select one from a few answer choices. Additionally, there is a text field option, allowing the respondent to type in an answer or comments manually.

Questions of this type are often used to have respondents choose one item, and then provide additional comments on the choice made.

1. Use the ‘Please select a question type’ option to select Pick one with ‘comment’ question.

2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box.

4. **Answers input modes** will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices within the list.

6. Specify the text asking for respondents’ comments (if needed).

7. Click the X button to remove an answer option from the answer list in Standard mode. If the button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

8. Click New Line to add a new answer line if needed.

9. Click Spell Check to check the spelling.

10. Click Preview to see what your question looks like.

11. Click **Save** to save your changes and go to the Edit Survey page.

‘Pick one with ‘comment’ question type preview:

![Select 'Yes' or 'No' and add a comment]

**Was the goal met? Please comment your choice.**

- [ ] Yes
- [ ] No

[Blank text box for comments]
Check All That Apply

Provide respondents with the ability to select one or more options from a list of checkboxes. You can set parameters that require the respondent to make a certain number of selections. Additionally, there is a text field option, allowing the respondent to manually type in an answer or comments.

Questions of this type are used in situations where a person needs to select more than one response, and possibly have to type in a unique response as well.
1. Use the ‘Please select a question type’ dropdown box (1) to select Check all that apply.

2. Click Example to see examples of this question.

3. Type your question text in the ‘Write your question below’ text box (2).

4. Answers input modes will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices within the list.

6. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

7. Select the Other option to create a new line for users to enter their own answer.

8. Click New Line to add a new answer line if needed.

9. Select the Respondent must check option and indicate appropriate values to require the respondent to make a certain number of selections.

10. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).

11. Use the ‘Select answer layout’ option to show the answers horizontally (‘Across’) or vertically (‘Down’).

   NOTE: If you select the ‘Across’ option, you can set spacing (from very small to huge) between answer choices using the dropdown box.

12. Click the Spell Check button to check the spelling.

13. Click Preview to see what your question looks like.

14. Click Save to save your changes and go to the Edit Survey page.

‘Check All That Apply’ question type preview:
Dropdown Box

Provide respondents with the ability to select one from a dropdown list of many answer choices. This question type is extremely useful when the list of answer choices is long (such as country, language, etc.).

1. Use the ‘Please select a question type’ option (1) to select ‘Dropdown Box’ type.
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box (2).

4. Use the ‘Select from these answers or write your own below’ dropdown box (3) to select a list of pre-defined answer options or skip this step.

5. Enter custom answer choices in the ‘Write answer choices below’ text fields (4). Input each choice in a different text field.

6. **Answers input modes** will be described in the further section of this manual.

7. Use up and down arrow buttons to move your answer choices within the list.

8. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

9. Click **New Line** to add a new answer line if needed.

10. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).

11. Click **Spell Check** to check the spelling.

12. Click **Preview** to see what your question looks like.

13. Click **Save** to save your changes and go to the Edit Survey page.

‘Dropdown Box’ question type preview:
List Box

Provide respondents with the ability to select one or more options from a few answer choices. This question type is useful for short lists of choices and for selecting more than one response.
Creating a Survey

1. Use the ‘Please select a question type’ dropdown box to select List Box.
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box (2).
4. **Answers input modes** will be described in the further section of this manual.
5. Use up and down arrow buttons to move your answer choices within the list.
6. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.
7. Click New Line to add a new answer line if needed.
8. Select the Respondent Must Check option to require respondents to make a certain number of selections.
9. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).
10. Click **Spell Check** to check the spelling.
11. Click **Preview** to see what your question looks like.
12. Click **Save** to save your changes and go to the Edit Survey page.

‘List Box’ question type preview:
**Single Line Text with Pre-Format Options**

Provides the ability to enter several individual lines of text and create custom formatting rules that require your respondents to type an answer that meets certain requirements.

This question type is useful for making sure data entry is a number, number of decimal place, number within a range, email address, date, etc.
1. Use ‘Please select a question type’ dropdown box to select ‘Single line text with pre-format options’ type.

2. Click **Example** to see examples of this type of question.

3. Type your question text in the ‘Write your question below’ (2) text box.

4. **Answers input modes** will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices within the list.

6. Click the **X** button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

7. Select the Format answers option and select the format for each answer line (using the corresponding ‘Format’ dropdown boxes).

8. If none of the predefined formats meet your requirements, click Customize to create your own format types. For more information, see the Customize Formats section of this manual.

9. Click **New Line** to add a new answer line if needed.

10. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).

11. Use the ‘Select answer layout’ option to display the answers horizontally (‘Across’) or vertically (‘Down’).

12. Click **Spell Check** to check the spelling.

13. Click **Preview** to see what your question looks like.

14. Click **Save** to save your changes and go to the **Edit Survey** page.

‘Single line text with pre-format options’ question type preview:

<table>
<thead>
<tr>
<th>Can you please provide us with your contact details?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Last Name</td>
</tr>
<tr>
<td>Your First Name</td>
</tr>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Company</td>
</tr>
<tr>
<td>Email adress</td>
</tr>
<tr>
<td>Home phone number</td>
</tr>
<tr>
<td>Work phone number</td>
</tr>
<tr>
<td>Street address</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Zip code</td>
</tr>
<tr>
<td>Skype</td>
</tr>
</tbody>
</table>
Multi-line text response – often used for comments

Provide respondents with the ability to type unlimited free-form text, allowing to comment on something in their own words.

This question type is useful for gathering additional information or user comments.

1. Use the ‘Please select a question type’ option (1) to select Multi-Line type.
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box (2).
4. Set the size of the text field respondents will use for their answer. The default size is 50 symbols of width and 5 of height. Field size does not limit number of symbols respondents can input.
5. Click Spell Check to check the spelling.
6. Click Preview to see what your question looks like.
7. Click Save to save your changes and go to the Edit Survey page.

‘Multi-line text response — often used for comments’ question type preview:
Rate Different Items Along the Scale of Your Choice

Obtain respondent feedback on various statements or evaluate various products or services by selecting a preset scale from our library or by designing your own.

1. Use ‘Please select a question type’ dropdown box (1) to select Rate different items along the scale of your choice.

Please evaluate how well you have met each of the following during the review period:

Question Analysis Code ___ Question Identifier ___

Choose any scale below

23. Exceptional - Exceeds requirements - Meets requirements

☐ Hide scale headings

Exceptional ○ Exceeds requirements ○ Meets requirements

Write answer choices below Or import choices from CSV

- Achieves set objectives.
- Demonstrates required job skills / knowledge.
- Demonstrates effective management and leadership skills.
- Completes all assigned responsibilities.
- Takes responsibility for actions.
- Recognizes potential problems and develops solutions.

☐ Answer any rows ○ Must answer all rows ○ Must answer ___ rows

☐ Absolute rank

Select answer order

☐ Do not change order

Toggle WYG!WYG editor
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box.
4. Select a rating scale using the ‘Choose your scale below’ dropdown box.
5. Click Customize to create a scale of your own. For more information, see the Customize Scale section of this manual.
6. Select the Hide scale headings option to hide the headers of the selected scale.
7. Enter the objects to be rated in the ‘List the products, features or services that you want rated along a scale’ single line text fields. If you want rated objects on both the left and the right sides of the scale, separate rated objects (within the same text field) with three vertical bars. For example: Men|||Women, Boys|||Girls, etc.
8. Answers input modes will be described in the further section of this manual.
9. Use the up and down arrow buttons to move your answer choices up and down the list.
10. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.
11. Click New Line to add a new answer line if needed.
12. Use the ‘answer option’ radio buttons to specify how the respondent must answer.
13. Select the Absolute rank option to allow respondents to rate items using each rating only once.
14. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).
15. Click Spell Check to check the spelling.
16. Click Preview to see what your question looks like.
17. Click Save to save your changes and go to the Edit Survey page.

‘Rate different items along the scale of your choice’ question type preview:
The 'Rate different items along the scale of your choice' question type with the application for the Star Rating Plugin preview:

<table>
<thead>
<tr>
<th>Achieves set objectives.</th>
<th>★★★★★ ★ ★★★★</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demonstrates Required Job Skills / Knowledge</td>
<td>★★★★★ ★★★★★</td>
</tr>
<tr>
<td>Demonstrates Effective Management and Leadership Skills</td>
<td>★★★★★ ★★★★★</td>
</tr>
<tr>
<td>Completes all assigned Responsibilities</td>
<td>★★★★★ ★★★★★</td>
</tr>
<tr>
<td>Takes Responsibility For Actions</td>
<td>★★★★★ ★★★★★</td>
</tr>
<tr>
<td>Recognizes Potential Problems And Develops Solutions</td>
<td>★★★★★ ★★★★★</td>
</tr>
</tbody>
</table>
Creating a Survey

Compare one against another

Ask respondents to choose between items to indicate which is most preferred. This feature is available if your subscription plan includes the Most preferred matrix option.

This question type allows you to obtain preference from your respondent by providing a list of compared items that narrows down partiality, even when the respondent is unsure of preference.

1. Use the ‘Please select a question type’ dropdown box to select Compare one against another.

![Image of Compare one against another question type](image.png)
2. Click **Example** to see examples of this question.

3. Type your question text in the ‘Write your question below’ text box (2).

4. **Answers input modes** will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices within the list.

6. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

7. Click **New Line** to add a new answer line if needed.

8. Use the ‘Select answer order’ dropdown box to modify your answer order (randomize, alphabetize, etc).

9. Click **Spell Check** to check the spelling.

10. Click **Preview** to see what your question looks like.

11. Click **Save** to save your changes and go to the **Edit Survey** page.

‘Compare one against another’ question type preview:

<table>
<thead>
<tr>
<th>Compare the following statements:</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>management does a good job communicating about changes or discussions that affect employees.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I am able to contact Senior Management when needed.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I have enough information to do my job well.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Managers communicate a clear sense of direction of my organization.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>managers do a good job communicating about changes or discussions that affect employees.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I am able to contact Senior Management when needed.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I have enough information to do my job well.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Managers communicate a clear sense of direction of my organization.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
3D Matrix

Use the 3D Matrix to obtain feedback from respondents, on different attributes associated with a product or service, at the same time. This question type allows you to gather information by requiring respondents to provide feedback using numbers, text, checkboxes, scales and dropdown boxes for each attribute.

The 3D Matrix question type creates a grid. You list your products, features, statements or services you want evaluated in the ‘answer choice’ lines (4) and enter your evaluation criteria as column headings. Each cell of the matrix grid allows a respondent to enter text or numeric values, according to the format you set. You can also opt to use a dropdown box containing values, this option provides response consistency.

1. Use the ‘Please select a question type’ (1) dropdown box to select 3D Matrix type.
2. Click **Example** to see examples of this question.

3. Type your question text in the ‘Write your question below’ text box (2).

4. Select a set of column headings (3), (from headings you have created previously) in the ‘Choose a scale or column headings for matrix’ dropdown box.

5. If this is the first 3D Matrix question you are creating, you have not created any column headings yet; therefore, click the Customize button to begin. For detailed instructions on completing this task, see the **Format 3D Matrix Column** section of this manual.

6. Select the Hide Scale option to hide the headers of the selected scale.

7. **Answers input modes** will be described in the further section of this manual.

8. Use the up and down arrow buttons to move your answer choices up and down the list.

9. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

10. Click **New Line** to add a new answer line if needed.

11. Select the **Must answer all rows** option if you do not want to let your respondents submit the survey without rating all of the items.

12. Use the **Select Answer Order** option to modify answers’ order (randomize, alphabetize, etc).

13. Click **Spell Check** to check the spelling.

14. Click **Preview** to check the spelling.

15. Click **Save** to see what your question looks like and go to the **Edit Survey** page.

---

‘Matrix’ question type preview:

```
<table>
<thead>
<tr>
<th>Please rate the following as it pertains to your job:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Knowledge</td>
</tr>
<tr>
<td>Work Quality</td>
</tr>
<tr>
<td>Attendance</td>
</tr>
<tr>
<td>Initiative</td>
</tr>
<tr>
<td>Poor       Fair        Satisfactory        Good       Excellent    Comments</td>
</tr>
<tr>
<td>0          0            0               0         0               0</td>
</tr>
<tr>
<td>0          0            0               0         0               0</td>
</tr>
<tr>
<td>0          0            0               0         0               0</td>
</tr>
</tbody>
</table>
```

Creating a Survey

Numeric Allocation

Allow respondents to enter numerical values and see the total sum of all values entered.

This question type is useful for controlling total sum values, such as percentages, that in some cases should add up to 100% or to check for values (like in the example below), not to total more than 24 hours.

1. Use the ‘Please select a question type’ dropdown box and select Numeric Allocation.

2. Click Example to see examples of this question.

3. Type your question text in the ‘Write your question below’ text box.

4. Answers input modes will be described in the further section of this manual.

5. Use the up and down arrow buttons to move your answer choices up and down the list.

6. Click the X button to remove an answer option from the answer list in Standard mode. If this button is
Creating a Survey

grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.

7. Use the **Format** option to specify the type of content your respondents can input.

8. If none of predefined formats meet your needs, click the **Customize** button to create your own format. For more information, see the **Customize Formats** section of this manual.

9. Click **New Line** to add a new answer line if needed.

10. Use the ‘Select Answer Order’ option to change answers’ order (randomize, alphabetize, etc).

11. In the ‘Calculate total sum’ area (4), specify the name of the ‘Total’ field and set limits for the sum total of the values input by respondents.

12. Click **Spell Check** to check the spelling.

13. Click **Preview** to see what your question looks like.

14. Click **Save** to save your changes and go to the **Edit Survey** page.

‘Numeric Allocation’ question type preview:

```
Please allocate your working time:

Reading emails: 2
Meetings: 2
Planning: 1
Managing staff: 4
Total: 9
```
Object Lookup

Lookup objects are special question types that allow you to present selected data from your Custom Data Models in handy cascadian dropdowns view, it can also be used as a filter for other Lookup questions.

Questions of this type are used to have a respondent choose a certain object from a dropdown by specifying its parameters in other dropdown if needed. Data in this dropdowns is transferred from selected columns of Custom Data Models as well as Contact Managers created in your account.

To add a "Lookup Object" question to your survey you need to select the Insert > New Question option on the 'Surveys > Questions' or on the 'Forms > Builder', and then:

1. Use the ‘Please select a question type’ dropdown box and select Object Lookup.
2. Click **Example** to see examples of this question.
3. Type your question text in the ‘Write your question below’ text box.
4. Click **Select** under the third step and choose the data model you would like to use here. Click Save.
5. Specify the label for Object Name. For more details consult the Custom Data Models chapter.
6. Click the **New field** and select any Data Model column. Label it in the text box on a right.
7. Define as many fields as needed by clicking the same New Field option.
8. Use the up and down arrow buttons to move Data Model columns up and down the list.
9. Click **New Field** to add a new dropdown line if needed.
10. Define as many fields as needed by clicking the same New Field option.
11. Click **Manage Filters** if you would like to have only certain choices be shown based on previous answer provided. Select which fields should be filtered up to what values. Values should be specified using Qx.ay. Cz references, where x is a question number, y is a number of an answer option and z is a number of a column (for the Rate Along The Scale and 3D Matrix types of questions).

![Additional Filter](image)

12. Click spell Check to check the spelling.
13. Click **Preview** to see what your question looks like.
14. Click **Save** to save your changes and go to the **Edit Survey** page.

![Please list one of your local business competitors:](image)
Multiple Object Lookup

Multiple Object Lookup is a special question type that allows you to present selected data from your Custom Data Models in handy cascadian dropdowns which in comparison to an Object Lookup question provides the respondent with a multiple choice option.

Questions of this type are used to have a respondent choose a certain object from a dropdown by specifying its parameters in other dropdown and choosing the answer options which fit the search criteria. Data in these dropdowns is transferred from the selected columns of Custom Data Models as well as Contact Managers created in your account.

To add a “Multiple Object Lookup” question to your survey you need to select the Insert > New Question option on the ‘Surveys > Questions’ or on the ‘Forms > Builder’, and then:

1. Use the ‘Please select a question type’ dropdown box and select Multiple Object Lookup.
2. Click **Example** to see examples of this question.

3. Type your question text in the ‘Write your question below’ text box.

4. Click **Select** under the third step and choose the data model you would like to use here. Click Save.

5. Input the label for Object Name. For more details consult the Custom Data Models chapter.

6. Specify how many columns and checkboxes you wish to display per page.

7. Indicate how many checkboxes the respondent must select.

8. Click the **New field** and select any Data Model column. Label it in the text box on the right.

9. Define as many fields as needed by clicking the same New Field option.

10. Use the up and down arrow buttons to move Data Model columns up and down the list.

11. Click **New Field** to add a new dropdown line if needed.

12. Define as many fields as needed by clicking the same New Field option.

13. Click **Manage Filters** if you would like to have only certain choices be shown based on previous answer provided. Select which fields should be filtered up to what values. Values should be specified using QxAyCz references, where x is a question number, y is a number of an answer option and z is a number of a column (for the Rate Along The Scale and 3D Matrix types of questions).

14. Click Spell Check to check the spelling.

15. Click **Preview** to see what your question looks like.

16. Click **Save** to save your changes and go to the Edit Survey page.
Creating a Survey

Creating a Survey

File Upload

The File Upload question type allows your respondent to upload files at the time of survey submission.

Questions of this type are used to allow respondents to browse files from their computer or mobile device, choose and upload them to the survey. File size can be limited.

To add a "File Upload" question to your survey you need to select the Insert > New Question option on the 'Surveys > Questions' or on the 'Forms > Builder', and then:

1. Use the ‘Please select a question type' dropdown box and select File Upload.
2. Click Example to see examples of this question.
3. Type your question text in the ‘Write your question below' text box.
4. Answers input modes will be described in the further section of this manual.
5. After listing answer options, specify a limit for uploaded file if needed. Click on Settings button next to the answer option, check the Maximum file size option and enter a limit in megabytes in the textbox below.
6. Use the up and down arrow buttons to move your answer choices up and down the list.
7. Click the X button to remove an answer option from the answer list in Standard mode. If this button is grayed out, then you are not allowed to delete this answer option because you have respondents who answered to it.
8. Click New Line to add a new answer line if needed.
9. Use the ‘Select Answer Order’ option to change answers’ order (randomize, alphabetize, etc).
10. Click Spell Check to check the spelling.
11. Click Preview to see what your question looks like.

2. Please attach the document here:

12. Click Save to save your changes and go to the Edit Survey page.
Optional Question Features

This page contains optional features that are used for designing questions of various types.

- Using HTML in a survey question
- Using WYSIWYG editor and other formatting options
- Answers input modes
- Import choices from CSV
- Advanced showing or hiding answers choices
- Selecting a set of predefined answer choices
- Setting a certain number of answers to select
- Selecting an answer order
- Specifying how the respondent must answer
- Adding images to questions or answers
- Question Analysis Code for the export functionality
- Question Identifier and Answer Identifier values
Using HTML in a survey question

You can use HTML while composing your questions.

If you use HTML, all hyperlinks should lead to your server. If you want to place any file on our server, you can upload it to the Media Library and get the link there.

1. Use HTML tags to change the style of your question text.
2. Click Preview to see the changes in the style of your question text.

Preview:
Using WYSIWYG editor

To perform advanced text formatting you can switch from the simple mode to the WYSIWYG mode by clicking the Toggle WYSIWYG Editor link.

**NOTE:** in WYSIWYG mode you can not use HTML.

Select the text you want to format and apply alignment, font style, weight and color. You can also insert links and graphics directly from the editor.

**Answers Input Modes**

There are three input modes available for answer options:

- **Standard Mode** – in this mode just type in answer choices one by one.
• **Rich Text Mode** – is used to customize answer options' text. You can make text bold, italic or underlined, insert/remove hyperlinks here etc.

Tools icon next to the answer choices allows you to insert application tags. For more details consult the Application Tags section.
• **Quick Mode** – is commonly used to copy and paste list of items from other sources or quick type in input. Each answer options must be separated with a new line.

```html
<p>Write label for each line Or <button type="button" class="import_csv" data-target="#import_csv_modal">import choices from CSV</button> Format answers</p>

<ol class="options_list">
  <li><code>\textless; Hit Enter after each item;\textgreater;</code></li>
  <li><code>\textless; b;From;\textgreater;</code></li>
  <li><code>\textless;i;To;\textgreater;</code></li>
</ol>

**Note:** Answer option fields are automatically resized based on the size of entered text.
Advanced showing or hiding answer options

Using this option you can show or hide answer options of particular questions depending on the respondent’s answers to the previous questions.

**NOTE:** This option is not available for ‘Section Header’ and ‘Multiline’ types of question.

1. Select the ‘Show if’ or ‘Hide if’ next to the answer choice you want to show or hide.
2. Input the condition based on which answers will be shown or hidden. Use \( Q_x, Q_x.A_y \) or \( Q_x.A_y.C_z \) notation depending on the question type you are referencing to. This means that if respondents answers met input criteria, they will see or do not see certain answer option. Autocomplete function will list you suggestions of questions available in the current survey.
3. Click **Save** to save your changes.
4. Click **Back** to go back to the **Edit Survey** page.
Import choices from CSV

The upload answer option functionality is available for all of the question types which require answer option input. The feature provides import of the answer option, Answer Identifier and the Show/Hide Logic settings.

The Data may only be uploaded in the following combinations:

1. Answer Options only.
2. Answer Options + Logic.
3. Answer Options + Logic + Answer Identifier.
4. Answers + Answer Identifier.

Where the:

1. Answer Option X - resembles the answer option you wish to import.
2. True/False - resembles the show/hide settings.
3. Qx.Ax - resembles the show/hide Logic Rule.
4. AOX - resembles the Answer Identifier.

An example of the CSV file:

<table>
<thead>
<tr>
<th>Answer Option</th>
<th>Show</th>
<th>Identifier</th>
<th>Logic Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer Option 1</td>
<td>true</td>
<td>Q2.A1</td>
<td>AO1</td>
</tr>
<tr>
<td>Answer Option 2</td>
<td>false</td>
<td>Q2.A2</td>
<td>AO2</td>
</tr>
<tr>
<td>Answer Option 3</td>
<td>true</td>
<td>Q2.A3</td>
<td>AO3</td>
</tr>
<tr>
<td>Answer Option 4</td>
<td>false</td>
<td>Q2.A4</td>
<td>AO4</td>
</tr>
<tr>
<td>Answer Option 5</td>
<td>true</td>
<td>Q2.A5</td>
<td>AO5</td>
</tr>
<tr>
<td>Answer Option 6</td>
<td>false</td>
<td>Q2.A6</td>
<td>AO6</td>
</tr>
<tr>
<td>Answer Option 7</td>
<td>true</td>
<td>Q3.A1</td>
<td>AO7</td>
</tr>
<tr>
<td>Answer Option 8</td>
<td>false</td>
<td>Q3.A2</td>
<td>AO8</td>
</tr>
<tr>
<td>Answer Option 9</td>
<td>true</td>
<td>Q3.A3</td>
<td>AO9</td>
</tr>
<tr>
<td>Answer Option 10</td>
<td>false</td>
<td>Q3.A4</td>
<td>AO10</td>
</tr>
<tr>
<td>Answer Option 11</td>
<td>true</td>
<td>Q3.A5</td>
<td>AO11</td>
</tr>
<tr>
<td>Answer Option 12</td>
<td>false</td>
<td>Q3.A6</td>
<td>AO12</td>
</tr>
</tbody>
</table>
An example of the end result:

![Survey screenshot]

**NOTE:** Previous questions must be created in order to apply show/hide logic from the imported file.
- Answer Identifiers must be unique.
Selecting a set of predefined answer choices

In this case, answers are automatically ranked and displayed in the corresponding lines.

1. Select a set of predefined answer choices, for example: ‘Likely – Unlikely’.
2. The ‘Write answer choices below’ text fields will be automatically filled with selected answer choices.
3. Click the Preview button to see how your question with the predefined answer choices looks like.

Preview:

Was the goal met?

- Highly Important
- Important
- Neutral
- Unimportant
- Highly Unimportant
- Other

NOTE: This feature is available for Pick One or ‘Other’ and Dropdown Box question types only.
Setting a Certain Number of Answers to Select

You can require the respondent to make a certain number of selections from the answer choices using the following options:

- Between a certain number of answer choices
- More than or equal to a certain number of answer choices
- Less than or equal to a certain number of answer choices
- Equal to a certain number of answer choices
Creating a Survey

1. Select the **Respondent must check** option.
2. Select ‘Between’ from the dropdown box to specify the selection range. Enter the number of answer choices.
3. Select ‘More than or equal to’ from the dropdown box to specify the selection range. Enter the number of answer choices.
4. Select ‘Less than or equal to’ from the dropdown box to specify the selection range.
5. Select ‘Equal to’ from the dropdown box to specify the selection range.

When respondents' answers do not match indicated criteria they will be notified with the pop-up message.

**NOTE:** This feature is available for **Check All That Apply** and **List Box** question types.
Selecting Answer Order

Use the ‘Select answer order’ dropdown box to select the answer order.

Choose ‘Do not change order’ if you want the answers to always be displayed in the same order.
Creating a Survey

Each time a respondent takes your survey:

> **Of the nine major benefits offered by a properly constructed pension scheme, how many are in place with your existing plan?**

- [ ] Income for retirement
- [ ] Death in service benefit
- [ ] Deferred retirement
- [ ] Tax free lumps
- [ ] Phased retirement
- [ ] Powers to 'loan bank'
- [ ] Powers of self investments

Select the **Rotate answers** to make the answers rotate (one line) each time a different respondent takes your survey.

The first time a respondent takes your survey:

> **Of the nine major benefits offered by a properly constructed pension scheme, how many are in place with your existing plan?**

- [ ] Deferred retirement
- [ ] Tax free lumps
- [ ] Phased retirement
- [ ] Powers to 'loan bank'
- [ ] Powers of self investments
- [ ] Income for retirement
- [ ] Death in service benefit

Select the **Randomize answers** if you want the answers to be displayed in random order.

Each time a respondent takes your survey answers will be randomized:

> **Of the nine major benefits offered by a properly constructed pension scheme, how many are in place with your existing plan?**

- [ ] Powers of self investments
- [ ] Death in service benefit
- [ ] Phased retirement
- [ ] Tax free lumps
- [ ] Powers to 'loan bank'
- [ ] Deferred retirement
- [ ] Income for retirement

Select the **Sort ascending** to display your items in alphabetical (ascending) order (from A to Z).
Creating a Survey

Each time a respondent takes your survey:

**Of the nine major benefits offered by a properly constructed pension scheme, how many are in place with your existing plan?**

- Death in service benefit
- Deferred retirement
- Income for retirement
- Phased retirement
- Powers of self investments
- Powers to 'loan bank'
- Tax free lumps

Select the ‘Sort descending’ to display your items in reverse (descending) order (from Z to A).

**NOTE:** This feature is case sensitive.

Each time a respondent takes your survey:

**Of the nine major benefits offered by a properly constructed pension scheme, how many are in place with your existing plan?**

- Tax free lumps
- Powers to ‘loan bank’
- Powers of self investments
- Phased retirement
- Income for retirement
- Deferred retirement
- Death in service benefit

**NOTE:** This feature is available for Pick One or ‘Other’, Check All That Apply, Dropdown Box, List Box, Single Line Text with Pre-Format Option, Rate Different Items Along the Scale of Your Choice, 3D Matrix and **Numeric Allocation** question types.
Specifying How the Respondent Must Answer

This option is available for the **Rate Different Items Along the Scale of Your Choice** question type only.

1. Select ‘Answer any rows’ if you want to allow your respondents to decide whether to rate a certain item or not.
When a respondent takes your survey:

Select **Must answer all rows** if you want your respondents to rate all the listed items.

Select **Must answer N rows** if you want your respondents to rate not less than N items among the listed ones.
Creating a Survey

How to Add Images to Questions or Answers

You can add images to your survey questions and answer options. You can also specify a URL to open a web page after clicking the image.

Use this feature to display pictures of products, concept drawings and samples. Often, visuals are easier to understand than text descriptions and are great for comparisons.

1. To add new image to a question or answer choice, click the Add Image button while editing or adding a new question.

2. Click the Browse button to find an image you would like to add within your Media library, select the image file and click OK.

3. If you need you can provide the image with a short description and specify the URL of the page that will open when clicking the image.
4. Click **Preview** to see your progress.
5. Click **Save** to upload specified images.
6. Click **Browse** if you want to upload the images next to your answer choices.
7. Specify your image position (‘Left’, ‘Top’ or ‘Right’), relative to question and answer choices.

8. Use the ‘Alignment’ option to designate the alignment of the image (‘Left’, ‘Center’ or ‘Right’).
9. Click **Preview** to see the progress.
10. Click **Save** to upload selected images and save URL settings.
11. Click the **Remove** link below the image if you wish to remove an image.

**Question Preview:**

```
Review Period:
From
To
```
NOTES:

- You can load an image into your question by using a web URL, by clicking the image button from the WQYSIWYG toolbar. If you have an image on your own hard disk and not in the library yet, you can easily click on Upload in Media Library and upload it from your computer.
- As images you can upload files with the extensions jpg, jpeg, bmp, gif or image files with no extension (for Mac OS files).
- If the image is saved in CMYK colorspace, it may be not displayed correctly as well as in most web applications. The colorspace to use should be RGB.

Question Analysis Code for the export functionality

Using the Question Analysis Code utility, you can specify the analysis code on the Edit Single Question page (1), and then export it into XML, Excel, SPSS, CSV for the statistic analysis purposes.

For example: to track the responses for questions with the same code across different surveys.

Question Identifier and Answer Identifier values

Using the Question and Answer Identifier feature you can assign custom names to questions and answer options. These custom names can be later used in Piping, Logic rules and Plugins settings.

To assign such identifiers proceed to the Edit Single Question page and type custom name to either Question Analysis Code field (1) or Answer Identifier field (2).
Advanced Editing Options

- Customize Scale
- Customize Formats
- Format 3D Matrix Columns
- Regular Expressions
- List of Regular Expressions
- Piping
- Piping of the parameters imported from URL
- Search and Replace
Customize Scale

Use this feature to create, edit and delete rank scales of your own. This feature allows you to customize rank scales for 'Rate' and '3D Matrix' type of questions.

1. Please select a question type
   Rate different items along the scale of your choice
   Example

2. Write your question below
   [Insert WYSIWYG editor]
   Please evaluate how well you have met each of the following during the review period:

   Question Analysis Code: [__] Question Identifier: [__]

3. Choose any scale below
   23. Exceptional - Exceeds requirements - Meets requirements
      ☐ Hide scale headings
      ☐ Customize

      Exceptional
      ☐
      ☐
      ☐
      ☐

      Exceeds requirements
      ☐
      ☐
      ☐
      ☐

      Meets requirements
      ☐
      ☐
      ☐
      ☐

4. Write answer choices below
   Or: [Import choices from CSV]
   [Insert WYSIWYG editor]
   Mode: Standard | Rich text | Quick
   Achieves set objectives.
   Demonstrates required job skills / knowledge.
   Demonstrates effective management and leadership skills.
   Completes all assigned responsibilities.
   Takes responsibility for actions.
   Recognizes potential problems and develops solutions.

   New line

   Answer any rows   Must answer all rows   Must answer rows

   Absolute rank

   Select answer order
   Do not change order
1. Next to the 'Choose any scale below' dropdown box, click **Customize** to create a scale of your own or manage existing scales.

2. To create a new rank scale click the **New Scale** button.

3. Click the **Info** button to see the list of surveys this scale is in use.

4. Select the scale you want to edit and click the **Edit** button.

5. Click the **Delete** button to delete selected scale.

6. When editing an existing scale, the changes will be reflected within all of the surveys this scale is used for. Thus we recommend creating a new scale by copying an existing one. Select appropriate scale and click the **Copy** button for that.

7. When creating new scale or edit existing scale use the 'Please select number of radio buttons in the rank'

   1. **Please select number of columns in the rank scale**

   2. **Type heading for each column below**

      1. Exceptional
      2. Exceeds Requirements
      3. Meets Requirements
      4. Marginal
      5. Unsatisfactory

8. Type the headings in the corresponding text boxes.

9. Click **Save** to save your scale.
NOTE:

- You can customize up to 12 heading items.
- If the text is long, do not forget to insert line breaks using the ‘Enter’ or return key.
- When customizing scale headings you can use HTML tags along with editing certain survey CSS parameters (H7, H8, H9, H12-21) to specify new styles.
Customize Formats

Use this feature to create custom field formats, which are valuable during answer data entry.

1. Select the **Format** option and then click **Customize formats** to create your own format types.

2. Click **New Format** to create a new format.

3. Click **Edit** to edit existing format.

4. Click **Delete** button to delete the format you need.

5. Click **Back** to go back to the previous page. All the unsaved changes will be lost.

6. When editing existing format or creating new one ‘Select content type’ as Text, from the dropdown box (for both text and numeric content).
7. Enter a name for your format in the ‘Format name’ text box.

8. Enter your own text in the ‘Alert text’ box. This text pops up if the respondent’s input does not match the expected formatting.


10. Enter a number of characters the ‘Field Width’ in the text box. If the sum of column width values is less than 120, you can set any field width.

11. Input a regular expression for pre-checking content’ to make the data entry format even more precise. Enter any regular expression. For more information, see the Using Regular Expressions section of this manual.

12. Enter the value corresponding to your regular expressions in the ‘Type value for test’ field to test the format.

13. Click the Test button to see how your regular expressions work.

14. Click Save to save your format.

15. ‘Select content type’ as Numbers, from the dropdown box (for numeric content only). This option is commonly used if you want respondents input numeric characters only.
16. Enter a name for your format in the ‘Format name’ text box.

17. Enter your own text in the ‘Alert text’ box. This text pops up if the respondent’s input does not match the expected formatting.


19. Enter a number of characters the ‘Field Width’ in the text box. If the sum of column width values is less than 120, you can set any field width.

20. Click Save to save your format.

21. Apply created formats to the answer choices from the list of the available formats.
Format 3D Matrix Column

This feature allows you to format your columns in the ‘3D Matrix’ question type. Use this feature to specify the type of data that can be entered (as responses) to your 3D Matrix question types. You can format each column separately or keep the same format for all columns.

Click **Format Column** to apply formats to the columns in the ‘3D Matrix’ type question. By default this question has General format which corresponds to the text fields.

### Formatting each column separately

1. Select the ‘**Format each column separately**’ option.

2. Select the column you want to format (2). In this example, ‘Poor’, ‘Fair’, ‘Satisfactory’, ‘Good’, ‘Excellent’ or ‘Comments’.

3. Specify the format of your cells (for the selected column) using the ‘**Column format**’ dropdown box (3).

2. Select the column you want to format (2). In this example, ‘Poor’, ‘Fair’, ‘Satisfactory’, ‘Good’, ‘Excellent’ or ‘Comments’.

3. Specify the format of your cells (for the selected column) using the ‘**Column format**’ dropdown box (3).
4. Use **Customize** to create your own format. For more information, see the **Customize Formats** subsection of this manual.

5. Click **Preview** to see how the selected format looks like.

6. Continue to set the formatting for each of the additional columns by repeating steps 2 through 5.

7. Click **Save** to save your format.

### Matrix columns formatted separately (Example):

<table>
<thead>
<tr>
<th>Please rate the following as it pertains to your job:</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] [ ] [ ] [ ] [ ] [ ]</td>
</tr>
</tbody>
</table>

- **Job Knowledge**
- **Work Quality**
- **Attendance**
- **Initiative**

8. Select the **Keep same format all columns** option (1). This is commonly used if your question has elements of the same format.

9. Specify the format of your cells using the ‘Column format’ dropdown box (2).

10. Click **Customize** to create your own format. For more information, see the **Customize Formats** subsection earlier in this section.

11. Click **Preview** to see how the selected format looks.

12. Click **Save** to save your format.
Matrix columns with the same format (Example):

<table>
<thead>
<tr>
<th></th>
<th>Poor</th>
<th>Fair</th>
<th>Satisfactory</th>
<th>Good</th>
<th>Excellent</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job knowledge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work quality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attendance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initiative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication/Listening</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dependability</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Using Regular Expressions

This advanced feature allows you to use regular expressions when creating new formats for the Single line text with pre-format options or 3D Matrix question types.

Regular expressions are patterns used to match character combinations in strings. A regular expression pattern is composed of simple characters, such as (abc) or a combination of simple and special characters, such as (ab*c) or {Chapter (\d+)\d*}.

Simple patterns are constructed of characters, used to define how to find a direct match. When the search for a match requires something more than a direct match (such as finding one or more “B’s” or finding “white space”), the pattern includes special characters.
1. Use the ‘Please select a question type’ dropdown box (1) to select **Single line text with pre-format options**.

2. Type your question text in the ‘Write your question below’ text box (2).

3. Enter answer options (3). In this example, we entered ‘From’ and ‘To’ which suppose to accept dates.

4. Select the **Format answers** option.

5. Click **Customize Formats** to create a new format (5).

6. Click the **New Format** button (1).
7. Set the 'Select content type' dropdown box to Text.

8. Enter a name of the format in the 'Format name' text box. In this example, we used 'Date' as the format name.

9. Edit the 'Alert Text', which is presented to a respondent if they do not format their answer properly (i.e. Please use the following format: mm/dd/yyyy).

10. Set the 'Character limit'. In this example, we entered 10 characters. This number of characters allows 10 digits to be entered (2 for month, 2 for day and 4 for year – the extra 2 are for the slashes that separate each item).

11. Set the 'Field width' to match the number of characters in the 'Character limit'.

12. Use the 'Input a regular expression for pre-checking contents' field to create an acceptable format for the field. In this case, we want the mm/dd/yyyy format (month, day, year). So, in this example, we used: \d\{2\}\d\{2\}\d\{4\}

**NOTE:** \d\{2\} and \d\{4\} refers to the sequence of two and 4 digits respectively (numbers 0 to 9). \/ stands for forward slash, \ is used to interpret / as a forward slash.
13. Enter the value corresponding to your regular expressions.
14. Click Test to check how your regular expressions work.
15. Click Save to save your format.

After clicking TEST:

16. Next to the 'From' and 'To' answer choice select the 'Date format' from the dropdown box (3).

17. Click Save to save your changes.
Test your newly created Regular Expression by entering a date with the format of mm/dd/yyyy (2 digit month, 2 digit day, 4 digit year). Please separate the month, day, and year with a forward slash, as it is the standard date format (and also how we set up this expression).

You will also notice, that any other combination will produce the error message that we set in the ‘Date’ format:
Regular expressions for popular formats

**PHONE NUMBER**
Character Limit: Equal to 12, this allows for 12 digits to be answered
Field Width: 12 characters (3 for area code, 3 for prefix, 4 for line number)
Regular Expressions: `\d{3}-\d{3}-\d{4}`

**NOTE:** `\d{3}` and `\d{4}` refers to the sequence of three and four digits respectively (numbers 0 to 9).
`\` - stands for a dash; `\` is used to interpret - as a dash.
Example: 000-000-0000

**ZIP CODE**
Character Limit: Equal to 5, this allows for 5 digits to be answered (there are 5 digits in a zip code)
Field Width: 5 characters
Regular Expressions: `\d{5}`

**NOTE:** `\d{5}` refers to the sequence of five digits
Example: 02135

**EMAIL**
This format is already in the list of pre-defined formats so you do not need to create it yourself. Just apply this format to appropriate field and respondents will be allowed to input answers similar to this one email@yourdomain.com
List of Regular Expressions

Working with Key Survey you can use the following regular expressions:

- **General**
- Maximum Quantifiers
- Alternative and Grouping
- Special notations with \`

<table>
<thead>
<tr>
<th><strong>General</strong></th>
<th><strong>Maximum Quantifiers</strong></th>
<th><strong>Alternative and Grouping</strong></th>
<th>*<em>Special notations with *</em></th>
</tr>
</thead>
<tbody>
<tr>
<td><code>a</code> matches any value containing the letter 'a'</td>
<td><code>{m,n}</code> at least m but not more than n times</td>
<td><code>[...]</code> matches any of the characters in the sequence</td>
<td><code>[^...]</code> matches any character except those in the sequence</td>
</tr>
<tr>
<td><code>^</code> matches the beginning of a string</td>
<td><code>{m}</code> m or more times</td>
<td><code>[^abc]</code> matches any character except those in brackets</td>
<td><code>[^abc]</code> matches any character except those in brackets</td>
</tr>
<tr>
<td><code>$</code> matches the end of a string</td>
<td><code>{,n}</code> 0 to n times</td>
<td><code>[^abd]</code> matches any character except those in brackets</td>
<td><code>[^abc]</code> matches any character except those in brackets</td>
</tr>
<tr>
<td>`. matches any character</td>
<td><code>*</code> matches 0 or more times</td>
<td><code>+</code> matches 1 or more times</td>
<td><code>?</code> matches 0 or 1 times</td>
</tr>
<tr>
<td><code>[^...]</code> matches any character except those in the sequence</td>
<td>Using the expression <code>/a{2,}</code> allows entering words containing 2 or more letters 'a'</td>
<td>The expression <code>/a+/</code> allows entering words containing 1 or more letters 'a'</td>
<td>Using the expression <code>/e?/</code> you can input words containing 0 or 1 letter 'e'</td>
</tr>
</tbody>
</table>
### Alternative and Grouping

| | alternative | The expression /green|red/ means that you can input either 'green' or 'red' |
| | grouping | The expression /(ca)*/ means that * refers to all characters in brackets and you can input words containing 0 or more letters 'c' and 'a' |

### Special notations with \\n
| \ | Toggles off the interpretation of metacharacters and converts the following alphacharacters (w,d,s) in metacharacters. | For example, * is a special character that means 0 or more occurrences of the preceding character should be specified; for example, /a*/ means match 0 or more a's. To match * literally, precede it with a backslash; for example, /a\*/ matches 'a*'. |
| \w | matches any single character classified as a “word” character: a letter or a number | The expression \w/ allows entering a letter or a number |
| \d | matches any digit character, equivalent to [0-9] | The expression \d/ allows entering a number from 0 to 9. |
| \s | matches any white space character | The expression \s\w*/ allows to input only one white space and after it 0 or more letters or numbers. |
| \W | matches any non-“word” character | The expression \W/ means that you can enter everything except letters and numbers. |
| \D | matches any non-digit character | The expression \D/ allows entering everything except numbers. |
| \S | matches any non-whitespace character | The expression \S/ allows to input everything except white spaces. |
Piping

Use the Piping feature to extract a response from a previous question and insert it into a following question or into one of the answer options of a following question. You can also use Piping within the email alerts.

This feature uses ‘tokens’ to achieve this.

1. Choose the question in which you want to insert response data (from a previous question).
2. Insert a ‘token’ (into the questions) referring to the corresponding response.
3. Save your settings.

TOKEN DETAILS:

Questions, answer options, ‘Thank You Page’, plugins’ parameters and email alerts can contain the following notations:

- [QX]
- [QX.AY]
- [QX.AY.CZ]
- URL:[Qx.Ay.Cz]
- TEXT:[Qx.Ay.Cz]
- [Question/Answer Identifier]
- {FormID}, {respondentID}

[QX] = Question Number “X”. For example, [Q4] refers to question number four.

[QX.AY] = Question Number “X” and Answer Number “Y”. For example, [Q10.A3] refers to answer number three in question number ten.

[Q2.A*] = All the answers to question 2 selected by the respondent. This token type is used for questions that allow more than one answer, such as Check All That Apply and List box.

[QX.AY.CZ] = 3D Matrix (type question) Number “X”, Answer Number “Y” and Column Number “Z”

URL:[Qx.Ay.Cz] is a special format to pass data correctly into the weblink.

TEXT:[Qx.Ay.Cz] format passes the exact entered text. Use this tag to avoid HTML tags applying during piping.

[Question/Answer Identifier] - custom reference created with the help of Question Identifier or Answer Identifier features.

{FormID} and {respondentID} references would pipe respective parameters into your survey fields or into settings of Remote Data Sender and Logical Remote Data Sender plugins.

NOTE:

- Using tokens in braces: {QX} or {QX.AY} allows you to format responses manually using HTML tags. For example, <b><i>{QX.AY}</i></b> is identical to [QX.AY].
• Autocomplete function allows you to enter piping expressions faster and easier. After entering \([Q]\), \([Q.X.A]\)
or \([Q.X.AY.C]\) system will show you the list of available questions, answer options or answer columns (for‘Rate’ and ‘3D Matrix’ questions) accordingly. Chosen element will be substituted by its survey sequence
number.

**Important things to keep in mind when using the ‘Piping’ feature:**

Tokens are case and format sensitive.

- In order to be identified, they must be written in uppercase, without any spaces or other symbols.
- Such symbol strings as \([q4]\), \([q7.a2]\) or \([q10;a5]\) will not be treated as tokens.
- Be careful when using tokens you input manually, some references can be invalid.

The question and answers numbers used in tokens must be valid.

Each token must refer to a question that precedes the one to which you want to apply piping.

**For example:** you cannot use token \([Q7]\) in question number 5.

Questions referred to for piping must be marked as ‘Must answer’ and cannot be ‘Hidden’ if it is not pre-populated.

**NOTE:**

- If ‘Branch on range’ logic has been applied, you cannot mark the questions referred to for piping as ‘Must answer’. In this case, the tokens should be used in braces {}.
- If ‘Branch’ or ‘Branch on range’ logic has been set, you cannot set page breaks for questions with tokens.
  In this case, the tokens should be used in braces {}.

You cannot use piping and randomizing (either questions or answers) simultaneously.

You must set page breaks between question with token and piped question. Questions with tokens cannot be on the same page as the question it refers to.

It is recommended you use piping responses for the following question types:

- Multi-line Text response
- Single-line Text Response with Pre-format Option
- Dropdown Box
- Pick One
- Check All That Apply
- List Box

If you refer to a question as a whole – not specifying answer number (token type \([QX]\)), it is implied that there can be only one answer to that question (Multi-line Text Response, Dropdown Box or Pick One question types).

If the type of response that the token refers to is ‘Text’ (Multi-line or Single-line text responses or Other response in a Pick one question type), the token will be substituted with the text entered by the respondent.
NOTE: You cannot use piping to insert responses that already contain tokens. Piping based on piping is not possible.

When the question order is changed and/or some questions are removed from and/or added to the question list, the numbering in tokens changes automatically. For example: if you set the token [Q5] in one of your survey questions and then add a new question to the beginning of the survey, the token automatically changes to [Q6].

If there is any mistake in tokens and the application cannot apply piping properly, invalid tokens will be substituted with ‘_________’.

NOTE: If tokens are used in braces {} there will be ‘space’ instead of invalid tokens. There is a special piping format for accurate passing of web links: URL:{Qx.Ay.Cz} and URL:[Qx.Ay.Cz].

You can insert AutoFilled information in Survey Name using piping tags.

Piping is applied in the following cases:
- In ‘Preview’ mode, while running the survey.
- In ‘View Report by Respondent’ mode.
- In all other cases (on the ‘Edit’ pages, in reports, charts and when exported to Excel/SPSS) tokens are displayed as [QX] and/or [QX.AY].

Example:

<table>
<thead>
<tr>
<th>Question number</th>
<th>Answer number</th>
<th>Appearance in edit, report, export etc. mode</th>
<th>Appearance in preview, report by respondent, running survey mode</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td></td>
<td>Please submit your personal information</td>
<td>Please submit your personal information</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Name</td>
<td>Name</td>
<td>Helen</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>City</td>
<td>City</td>
<td>Boston</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Email</td>
<td>Email</td>
<td><a href="mailto:helen@hotmail.com">helen@hotmail.com</a></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>Dear [Q10.A1], your email address [Q10.A3] will be added to our database, please specify the subject line for your email below.</td>
<td>Dear Helen, your email address <a href="mailto:helen@hotmail.com">helen@hotmail.com</a> will be added to our database, please specify the subject line for your email below.</td>
<td>Hello from Boston!</td>
</tr>
<tr>
<td>13</td>
<td></td>
<td>[Q10.A1], Please indicate the best ways to contact you (You may select more than one way).</td>
<td>Helen, Please indicate the best ways to contact you (You may select more than one way).</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Email</td>
<td>Email</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone</td>
<td>Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>-------</td>
<td>-------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Fax</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Thank You page**

- Thank you, [Q10.A1], for your time. From now on your emails from [Q10.A3] will have subject '[Q12]'. To inform you of our updates, we will contact you by: [Q13.A*]

- Thank you, Helen, for your time. From now on your emails from helen@hotmail.com will have subject 'Hello from Boston!'. To inform you of our updates, we will contact you by: Email, Fax
Piping of the parameters imported from URL

This feature allows you to use the ‘URL Import’ and ‘Piping’ options together.

Use this feature to import parameters from an email address line into one of the questions on the first page of the survey. Additionally, you can use them in the following questions or on the ‘Thank you’ page.

To use this combination features, design a survey and then:

1. Add a Single Line Text with Pre-Format Option question on the first page of your survey.

2. Insert the tag `<import param="XXX"/>` into responses where you want to import the parameters (from the email address line). For additional information, see the URL import section of this manual.

3. Insert tokens [QX.AY] or {QX.AY} into the questions, where you want to use the imported data. For additional information, see the Piping sub-section earlier in this section.

**NOTE:**
A question with imported parameters must precede the questions in which these parameters will be used.

Here is an example of using URL Import and Piping together.

The data has been imported from the following URL:

http://216.235.248.162/f/16309/2835/?LQID=1&name=Pat&email=pat@a.net

<table>
<thead>
<tr>
<th>Question number</th>
<th>Answer number</th>
<th>Appearance in edit, preview, report, export etc. mode</th>
<th>Appearance in report by respondent, running survey mode</th>
<th>Imported Parameters</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Name&lt;import param=&quot;name&quot;/&gt;</td>
<td>Personal information:</td>
<td>Pat</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>Email&lt;import param=&quot;email&quot;/&gt;</td>
<td>Email</td>
<td><a href="mailto:pat@a.net">pat@a.net</a></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Dear [Q1.A1], your email address [Q1.A2] will be added to our database.</td>
<td>Dear Pat, your email address <a href="mailto:pat@a.net">pat@a.net</a> will be added to our database.</td>
<td></td>
</tr>
<tr>
<td>Thank You page.</td>
<td></td>
<td>Thank you, [Q1.A1], for your time. From now on we will contact you by Email using your email address [Q1.A2] to inform you of our updates.</td>
<td>Thank you, Pat, for your time. From now on we will contact you by Email using your email address <a href="mailto:pat@a.net">pat@a.net</a> to inform you of our updates.</td>
<td></td>
</tr>
</tbody>
</table>
Search and Replace

While you create a survey, add questions and other survey items on the Edit Survey page, you can use the Search and Replace option to search for particular question text or replace some text for all questions and answer options at once.

1. At the right top of Edit Survey page input text for search and click the Go button for simple text search.
2. Click the arrow next to the Go button to roll over advanced search menu.
3. Select Advanced Search for advanced search options:

- Match Case – searches for text in the exact case.
- Find Whole Words Only – searches the whole string you indicated.
- Use Wildcards – searches in accordance to the following rules:
  - ? – substitutes as a wildcard character for any single character.
  - * – substitutes as a wildcard character for any zero or more characters.
4. The **Replace** option allows you to find and replace question or answer text. It also contains Advanced Search options described in the previous step.

5. The **Go to** option is commonly used for the survey with the long list of questions. This allows you to quickly navigate to the certain question.
Pagination

Split your question list on the Edit Survey section into several pages with the help of pagination available on the top left.

Pagination does not affect your survey logic, plugins or the whole questionnaire presentation to respondents in any way. It only allows you to list 10, 50 or 100 of questions on the same page during your survey edit and makes it easier and faster for you to work on the survey.

To set pagination for your survey follow the steps below:

1. Once logged in your account, click on the name of the survey you would like to work with and hit the Edit button from the right pane.

2. Click on the arrow next to the question numbers on the top left.

3. Select number of questions you would like to be shown on the question list on this page at once.

Once you have split question list using pagination, its navigation becomes clickable and you can switch pages by clicking on arrows or Previous/Next.
Using Logical Transitions in your Survey

Use logical transitions to direct respondents to particular questions or survey pages, based on their answers to specific questions. Logical transitions help you to organize your survey, by establishing logical connections between the various sections.

Key Survey allows you to apply several types of logical transitions:

- Skip Logic
- Branch Logic
- Branch Logic for Multiple Answers
- Branch on Range
- Advanced Logic
- Actions
Skip Logic

Use this unconditional transition to direct all respondents to the same question after clicking the Next button in a survey.

This logical transition guides respondents through the survey in the way it was intended, by making sure sections follow the appropriate order.

1. Click the Logic button that applies to the question you want to add logic to, on the Edit Survey page.

2. Select the ‘Skip Logic’ option to apply this logical transition to the question.

3. Use the ‘Select the next question to follow the question above’ dropdown box (2) to select the question that respondents will answer after this question.

4. The Reset button is used to delete applied logic.

5. Click Save to save your changes and return to the Edit Survey page.

6. Click Cancel to cancel this action and return to the Edit Survey page, without saving changes.
Creating a Survey 130

After Skip Logic is applied:

### Question 1

**Question type:** Single line text with pre-format options

**Employee details**

- **Answer options:**
  - Employee Name:
  - Employee Emails:
  - Employee ID:
  - Job Title:
  - Date:
  - Department:
  - Manager:

### Question 2

**Question type:** Check all that apply

**Communication**

- **Answer options:**
  - Management does a good job communicating about changes or decisions that affect employees.
  - I am able to contact Senior Management when needed.
  - I have enough information to do my job well.
  - Managers communicate a clear sense of direction for my organization.

---

**NOTE:** Skip Logic is very useful in three cases:

- You have a survey question using Branch Logic, and you do not want respondents who select one answer to see questions aimed for those who select a different answer. For example, a question asks, “Have you ever bought from us?”. You want to ask “Why not?” to those who answered ‘No’, and “What did you buy?” to those who answered ‘Yes’. At the same time, you do not want to ask “What did you buy?” to those respondents who answered ‘No’. In this example, you apply Skip logic to question “Why not?”.

- You have a survey question using Branch on Range, and you want those respondents who have different scores to answer different blocks of questions. For example, you want those who scored less than 5 points to answer questions 10 to 15; and those who scored more than 5 points - questions 16 to 20. After this, you want everybody to answer question 21. In this case, you apply Skip Logic to question 15 and indicate question 21 in the corresponding text box.

- You have designed a survey with many questions and you want the respondents to see only a part of it. This can be used as an alternative to hiding questions.
Branch Logic

Use this conditional transition to direct respondents to the next question based on their answer (or answers) to the current question. You can apply this logic, providing the question has at least two questions following it.

1. Click the Logic button that applies to the question you want to add logic to, on the Edit Survey page.

2. Select the ‘Branch logic’ to apply this logical transition to the question.

3. Use the ‘Select questions to follow each answer’ dropdown boxes (2) to select the question respondents see if they select the corresponding answer.
4. The **Select a question to follow this section** is used to redirect respondents to different question or to the end of the survey after they passed the logic branch.

5. Click **Reset** to reset to default values.

6. Click **Save** to save your changes and return to the **Edit Survey** page.

7. Click **Cancel** to cancel this action and return to the **Edit Survey** page, without saving changes.

**After Branch Logic is applied:**

- This is a powerful feature and you should be careful how you use it. Keep in mind that questions, where you have applied Branch Logic, must come before the questions selected to follow them.
- Logic should be the last thing applied to a question. If you modify the question in any way, the logic settings will be canceled.
- This type of logic can only be applied to multiple-choice questions (Pick one, Check all that apply, Dropdown Box and List Box).
  
  **For example:** If you ask someone “Have you ever bought from us?” --- the answer ‘No’ can lead to “Why not?”, while the answer ‘Yes’ can lead to “What did you buy?”

- You can also apply Branch Logic to questions that allow multiple answers (Check all that apply and List box types). Consult the **Branch Logic for Multiple Answers** section of this manual for details.
Branch Logic for Multiple Answers

Use this conditional transition to direct respondents to the next question based on their answer (or answers) to the current multiple-choice question (Check All that Apply and List Box). This type of logic allows to create question sections and redirect respondents to appropriate sections based on their answers.

1. Click the Logic button that applies to the multiple-choice question you want to add logic to.

2. Select Branch Logic to apply this logical transition to the question.

3. Use the ‘Select questions to follow each answer’ dropdown boxes to select the question respondents see if they select the corresponding answer.

4. Use the ‘Select a question to follow this section’ dropdown box to select the question respondents see after completing the questions in this section.

5. Click Reset to reset to the default settings.

6. Click Save to save your changes and return to the Edit Survey page.
NOTE:

- This is a powerful feature but you should be careful as you use it. You should keep in mind that the questions where you have applied 'Branch logic' must come before the questions selected to follow them.

- If your logic set in the way that there are some questions between those that logic send respondents to (as shown on the example picture), such question will not be displayed to respondents, but only those that fulfill the logic settings.

- Logic should be the last thing applied to a question. If you modify the question in any way, the logic settings will be canceled.
Branch on Range

Use this conditional transition to direct respondents to the next questions based on the amount of points scored when answering questions earlier in the same survey.

1. Click the **Logic** button that applies to the multiple-choice question you want to apply logic.

2. Select the ‘Branch on range’ option to apply a logical transition to the question.
3. In the ‘Set value for each answer’ textboxes indicate how many points respondents can score for each answer. You can use both negative and positive numbers as well as numbers with up to five decimal places. Scores can also be assigned to the preceding questions.

4. Click **Save** to save the values you have indicated.

5. Click **Reset** to clear ALL the values you have indicated.

6. Click **Add New** to add a new logic rule. When respondents answer the survey questions scores will be automatically calculated and based on the logic rules respondents will be redirected to appropriate questions.

7. Use the ‘If total score is’ dropdown box and text box to set the total score range needed to ‘go to’ the question indicated in the second dropdown box.

8. Select the question, asked to respondents whose score is between minimum and maximum value.

9. Click **Save** to save logic rule. Created logic rules will be listed within the **Go to over** table.

10. Click **Add New** to create a new logic rule.

11. Click **Edit** to make changes to the logic rules you have created before.

12. Click **Delete** to delete corresponding logic rules.

13. **Reset** clears all logic rules you have created.

**After Branch on Range Logic is applied:**
Additional Notes:

- Logic should be the last thing applied to a question. If you modify the question in any way, the logic settings will be canceled.
- When questions allow multiple answers (Check all that apply and List box), points for each selected answer are summed up. The best way to design logic for these questions is to apply the following points to the answers: 1-10-100-1000.
- Values can be set to answers in questions of the following types: Pick One or ‘Other’, Pick One with ‘Comment’, Check All That Apply, Dropdown Box, List Box, Rate Different Items Along the Scale of Your Choice and Compare one against another.
- With Rate Different Items along the Scale of Your Choice, values are set to the scales and you cannot set values to the default scale. Values are summed up in each scale separately. If you use a certain scale several times, the values will be equal.
- With Compare one against another, if you select a certain answer several times its values are summed up.
- If you need to change values in questions with Branch on Range, do it in the last question with this feature. If you change the values in the previous questions, the values in the questions that follow it become null.
- You can use both positive and negative numbers.
- If you use Branch on Range in an ‘Examination’ (Teacher-Student) survey (where you have both right and wrong answers), and you want to apply the logic to questions that allow multiple answers, it is recommended that the sum total of right answers be equal to the sum total of wrong answers with negative sign.

For example: “What are the colors of the USA national flag?”

<table>
<thead>
<tr>
<th>Answers</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>2</td>
</tr>
<tr>
<td>Green</td>
<td>-3</td>
</tr>
<tr>
<td>Blue</td>
<td>2</td>
</tr>
<tr>
<td>Yellow</td>
<td>-3</td>
</tr>
<tr>
<td>White</td>
<td>2</td>
</tr>
</tbody>
</table>

In this case, if respondents choose all the correct answers, they will score 6 points.

- You must set logic rules (for going to the next question) for all possible scores. All values indicated in logic rules should be different – extremities of interval are included when using Branch on Range.

For example:
If you want to divide the respondents into three groups – those who scored from 5 to 10 points, those who scored less and those who scored more – you should create three logic rules:

- If total score is ‘less than 5’ go to question X.
- If total score is ‘between 5 and 10’ go to question Y.
- If total score is ‘more than 11’ go to question Z.
Advanced Logic

Use this conditional transition to apply advanced redirect and send respondents to the next question based on their answer to a particular question or to the previous question(s). This logic checks for the selection of particular answers in questions.

This logic transition creates a flexible survey structure, which provides respondents with dynamically organized surveys. For example: A vegetarian will never get the question: “Which meat dishes do you prefer?”

1. Click the Logic button next to the appropriate question.

2. Select the ‘Advanced logic’ option.

3. Click Add New to create a new logic rule (2).

There are two modes available for composing logic rules - advanced logic constructor and simple mode. You can switch between them on the top left.
Simple Mode

Using Simple mode you can compose logical rules by selecting question, answer options, statements and operators from respective dropdowns.

The following items are available from this page:

Selecting questions (1), answer options (2), statements (3) and operators (4) from dropdowns, buttons for adding (5) or deleting (6) references and same options for groups (7 and 8). Once you have set an expressions that should trigger routing, select the question to send respondents to (9).

Advanced mode

Here you can enter a logic expression in the text box (1). For additional details, see the Logic Expression Format sub-section of this manual. After entering Q, Qx,A or Qx,Ay,C autocomplete function will show you the list of available questions, answer options or answer columns (for ‘Rate’ and ‘3D Matrix’ questions) accordingly. Picked element will be substituted by its sequence number within the survey. Once you have typed in the logical expression:
And saved it:

4. Select a question from the dropdown box to go to if indicated condition is fulfilled.
5. Click **Save** to save the logic rule or **Cancel** to cancel the settings. Created rules are displayed within the **Manage Logic Rules** table (1).
6. Click **Edit** to edit your logic rule (2) or select a mode to edit this rule in right away by clicking on the arrow button (3).
7. Click **Delete** to remove your logic rule (4).
8. If you create more than one logic rules, you can set up their priority by means of the up and down arrow buttons (5).
9. Click **Activate** to turn on all logic rules. If you later decide to remove logic, you can just deactivate logic rules and then activate them again if necessary.

**Note:**
Logic rules are processed top to bottom; therefore, those rules with higher priority should appear topmost in the list.

**For example:**
If Q1.A4 => Q12 (if respondents select answer four in question one they go to question twelve)
If Q1 => Q14 (if respondents select any answer in the question one they go to question fourteen)
If the second rule is topmost and its condition is fulfilled, respondents go directly to question fourteen, so the first rule will never work.
After Advanced Logic is applied to question.
Logic Expression Format

To compose logic expression (to check if particular questions and answers have been selected) use the following formats:

- Q1 checks if any answer has been selected in question No 1
- Q10.A3 checks if answer No 3 has been selected in question No 10
- Q5.A2.C3 checks if answer No 2 has been rated in column No 3 of question No 5 (for Rate Different Items Along the Scale of Your Choice)
- Q7.C5 checks if any answer has been selected in column No 5 of question No 7 (for Rate Different Items Along the Scale of Your Choice)

Combining and Grouping

In Advanced mode you can combine logic conditions using AND, OR and NOT operators as well as group them with parenthesis (). In Simple mode operators are selected from dropdowns and creating groups replaces parenthesis.

Logic Operators

- **Operator AND** denotes that all the combined logic conditions are fulfilled.
  If Q1.A1 AND Q1.A3 => Q4 – states you will go to question 4 if both answer 1 and answer 3 are selected in question 1.
- **Operator OR** denotes that at least one of the combined logic conditions is fulfilled.
  If Q1.A1 OR Q1.A3 => Q4 – states you will go to question 4 if either answer 1 or answer 3 is selected in question 1.
- **Operator NOT** denies that a logic condition is not fulfilled. You can put it at the beginning of a logic condition or after AND, OR operators.
  If NOT Q1.A2 => Q4 – states you will go to question 4 if answer 2 is not selected in question 1
- You can use **AND, OR, NOT** operators in the same logic expression simultaneously. Use parenthesis to make your logic specific.
  If (Q1.A1 AND Q1.A3) OR NOT Q2.A3 => Q4 – states you will go to question 4 if – either both answer 1 and answer 3 are selected in question 1 or answer 3 is not selected in question 2.

Valid Symbols and Logic Expression

<table>
<thead>
<tr>
<th>Valid symbols</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letters: Q, A, C</td>
<td>Q1, Q1.C4, Q2.A3</td>
</tr>
<tr>
<td>Numbers: 1-9, 10 - more</td>
<td>Q9, Q23.A5</td>
</tr>
<tr>
<td>Dots: ...</td>
<td>Q3.A5.C7</td>
</tr>
<tr>
<td>Parenthesis: ()</td>
<td>(Q1 AND Q3.A2) OR (Q5.A1 AND Q5.A3)</td>
</tr>
</tbody>
</table>
## Conventional Statements in Alert Messages

<table>
<thead>
<tr>
<th>Statements</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>EOF</code> (= end of logic expression)</td>
<td>Q1.A2 AND - here the end of the logic expression was encountered; however, logic condition (for example, Q1.A3) was expected.</td>
</tr>
<tr>
<td><code>OPERAND</code> (= logic condition)</td>
<td></td>
</tr>
</tbody>
</table>

## Advanced Logic with Text Responses

You can apply Advanced Logic to text responses in the question of the following types: **Single line text with pre-format options**, **Multi-line text response** and **Numeric Allocation**. You can use the operators listed in the table below.

<table>
<thead>
<tr>
<th>Operator =</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>==</code></td>
<td>If text responses contain the exact text string indicated next to the <code>==</code> operator, the logic transition is fulfilled.</td>
<td>Q1.A2==Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathleen</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat</td>
</tr>
<tr>
<td><code>&lt;&gt;</code></td>
<td>If text responses do not contain the exact text string indicated next to the <code>&lt;&gt;</code> operator, the logic transition is fulfilled.</td>
<td>Q2.A3&lt;&gt;Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathleen</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat</td>
</tr>
<tr>
<td><code>==LIKE</code></td>
<td>If text responses contain the text string indicated next to the <code>==LIKE</code> operator, regardless of its position in the text responses, the logic transition is fulfilled.</td>
<td>Q2.A3==LIKECat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathleen</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Beautiful Flower</td>
</tr>
<tr>
<td><code>&lt;&gt;LIKE</code></td>
<td>If text responses do not contain the text string indicated next to the <code>&lt;&gt;LIKE</code> operator, regardless of its position in the text responses, the logic transition is fulfilled.</td>
<td>Q2.A3&lt;&gt;LIKECat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathleen</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Beautiful Flower</td>
</tr>
<tr>
<td><code>==RLIKE</code></td>
<td>If text responses contain the text string specified by regular expressions next to the <code>==RLIKE</code> operator, regardless of its position in the text responses, the logic transition is fulfilled.</td>
<td>```==RI LIKE RED(\s</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
<tr>
<td>Logic</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>&lt;&gt;RLIKE</td>
<td>If text responses do not contain the line string specified by regular expressions next to '&lt;&gt;RLIKE' regardless of its position in the text responses, then logic transition is fulfilled.</td>
<td>&lt;&gt;RLIKE()\s+Cross</td>
</tr>
<tr>
<td>==RMATCHES</td>
<td>==RMATCHESxxx is the same as ==RLIKE^xxx$</td>
<td>Q1.A1==RMATCHES Red()+Cross</td>
</tr>
<tr>
<td>&lt;&gt;RMATCHES</td>
<td>&lt;&gt;RMATCHESxxx is the same as &lt;&gt;RLIKE^xxx$</td>
<td>Q1.A1&lt;&gt;RMATCHES Red()+Cross</td>
</tr>
</tbody>
</table>

**NOTE:** Logic expressions are case-sensitive. You must use only Java syntax in regular expressions.

**Additional Information**

- This is a powerful feature, so you should be careful as you use it. Keep in mind that questions, where you have applied Advanced logic, must come before the questions selected to follow them.
- Logic should be the last thing applied to a question. If you modify a question in any way, make sure that your logic rules still work properly.
Actions

The actions functionality The application of the Actions feature provides you with a powerful automation utility which allows the creation and application of actions, which will be performed in accordance to the logic rule they are applied to.

The utilization of action groups or separately applied action sets is very useful in the creation of complex branching, response automation and notification functionality.

With the application of the following feature you will be able to apply the following functionality:

- **Branching** - a simple creation and management of branching logical rules.
- **Set Values** - create and manage automated response autofill functionality based on predefined logical rules.
- **Email Alert** - create and manage automated Email Alert dispatch based on the created logical rules.
Branching Actions

The branching action feature is best used in solutions which require a great amount of question transitions. Apart from that, the action will be executed in accordance with the specified logic rule.

In order to apply the Branching functionality follow the steps below:

1. Select the Branching feature from the pop-up Actions window.

2. Select the question which the respondent will be redirected from.

![Branching Actions Interface](image)

- **Branch after**
  - Q2. Please specify your age:

- **Logic expression**
  - Mode: Simple / Advanced
  - If Q2. Please specify your age: A4 selected

- **If the above expression is True go to**
  - End of survey
3. Specify or create a new logic rule which will act as a requirement for the respondent transition.

4. Choose the question you would like to transfer the respondent to.

5. Click **Save** to save your work.

For a more detailed description, see the *Branching logic* section of this manual.
Set Value

Based on the execution of an associated logic rule, the set value feature is capable of submitting pre-defined responses to the specified questions.

In order to apply the Set Value functionality follow the steps below:

1. Select the Set Value feature from the pop-up Actions window.

2. Indicate or create the logic expression which, once met, will trigger the submission of the pre-defined answer or clear the previously chosen answer.
3. Specify or create a new logic rule which will act as a requirement for the respondent transition.

4. Select the answer option from the first dropdown and the action you wish to implement from the second, indicate the response you wish to apply to the answer option/field.

5. Click **Save** to save your configuration.

**NOTE:**

- The Set Value functionality may also be used to reassign or clear answers given to previous questions.
Email Alert Actions

Email alerts are used to automatically generate email to either yourself or to a respondent, when a particular response is selected. Additionally, you can setup the email alert to go to other email addresses as well.

You can set up another email for each answer a respondent makes. Each email can have a different subject line, body text, list of recipients and sender’s address. Emails sent to your respondents can also have attachments.

Email alerts are often used to notify customer support if a respondent answers they are ‘dissatisfied’, or a sales person if the respondent answers they are planning to buy soon, as well as automatically emailing an e-catalog to a respondent if they answer ‘yes’ to ‘do you want to receive a catalog?’

1. To set up an email alert, click the Actions button while editing your survey questions.

2. Click the Email Alert button to set up a new email alert.

3. Use existing rules or create the rules and conditions when the alerts should be sent. Email alert menu depends on the question type the alert is applied to.

- For the questions of ‘Pick One or Other’, ‘Pick One with Comment’, ‘Check All That apply’, ‘Dropdown Box’, ‘List Box’ types:
  - select the responses you want the email alert to be applied by selecting corresponding answers.
Creating a Survey

Alert to another person – is used to send the email alert to third-parties. You can indicate any email addresses you want.

4. Select email alert type:
   - Alert to respondent will be sent to the email address of the particular respondent either if survey has been launched via Email Survey Distribution or by means of Master URL with the Respondent’s Email option activated.
   - Alert to survey owner – alert will go to the email address that is associated with your account. You can modify it on the My Account -> Profile page

5. Name your email alert. Thus you can distinguish it among the list of other email alerts if any. The name should be unique for every new alert within the question.

NOTE:
If you select multiple responses for the questions of ‘Pick One’ and ‘Dropdown Box’ type, the system will trigger an email alert based either on one response or another one. If you select multiple responses for the questions of ‘Check All That apply’ and ‘List Box’ type, the system will send an email alert only if the combination of these responses will be used by the respondent. For different combinations set up separate email alerts.
• For the questions of 'Rate Different Items Along the Scale of Choice' type:
  – select the check boxes standing for the responses rated along the scale.

• For the questions with text responses of 'Single Line' and 'Multi Line Text Response' and the ‘Numeric Allocation’ type:
  – select the text response
  – specify the alert condition (does/ does not/ is empty/ is not empty).
  – specify the entry type (match/ contains)
  – enter the word(s) or characters you are/are not interested in. Use space as separator if your alert setting will be based on more than one word.

6. Click Save to save your work and setup the email alert.

• Use the Email Text option to indicate email alert parameters. For a more detailed description, see the Composing your Email Message section of this manual.

• If you have selected to send email alert to survey owner or to another person, list the email addresses to which this particular alert should be sent in the To and Bcc fields. Email addresses should be separated with commas. When you send to a Bcc list, you should put an address into the To field anyway because some SMTP servers require it.

• If there was an import of the additional information you can use [Fx] or [CM:Field Name] tags. X is the sequence number of the field within your Data File if you pre-populate the survey using Autofill feature. Field Name is the field name within the Contact Manager to import the data from.

• The input survey data may be piped within the email alert using piping tokens. For more details, see Piping chapter of this manual.

• The one who receives the Email Alert to an email address from autofilled data (inserted by means of [Fx]) can view only the particular report by clicking the link to it. It means that the 'View by Respondent' mode does not have navigation, unlike when you insert email addresses directly in the ‘email alert to’ field all the survey reports can be viewed using navigation buttons.

NOTE:

• You can set up email alerts to go out to both respondents and to specified addresses at the same time. To do so, go through the setup procedure twice – once in each mode.

• You can send email alerts to all respondents who have taken the survey via the Master URL. For more information, see the Respondent’s Email sub-section of this manual.
Manage Email Alerts

Email Alerts panel allows you to activate/deactivate already created alerts, edit alert settings, edit alert email text, copy alert settings to a new alert and delete email alerts. Here you can view the list of all your present alerts within the question, easily handle the specific email alert, check the status of alert activity.

To manage your email alerts, click the arrow button next to the Actions button and choose Email Alert.

The menu contains the following controls:

- **Activate/Deactivate** – This option allows you turn on or turn off the email alerts by clicking on the checkbox next to the alert name. This can be useful if you want to test the survey from your side and do not want any email alerts to be sent.
- **To edit the email alert click** Edit next to it.
- **If you need to create many email alerts with the similar parameters, you can copy the alert each time and change email alert condition afterwards.**
- **To delete the email alert, select it using the red X next to it and click the OK button.**
Application Tags

Application tags are used to enlarge capabilities of the default survey creation functionality, thus you can make it more interactive and respondent-friendly.

- URL Import
- Subheader
- New column
- Quota
- Block
- Respondent's Email
- Review
- Save and Finish Later
URL Import

This feature provides you with the ability to insert and import additional data from a URL. Profile information, ID, password etc. are some examples of ‘additional data’. With this feature, you use a parameter from a survey link, as an answer to a survey question or to track the page from which a respondent has taken the survey, and collect all the results in one report.

Here is the example of using this feature:

1. Select the **Single Line Text with Pre-Format Option** question type.

![Screenshot of the survey creation interface](image)

**Question Analysis Code**

**Question Identifier**

**Modes:**

- **Standard**
- **Rich text**

**Fields:**

- Your Last Name
- Your First Name
- Title
- Company
- Email address
- City
- Zip code
- Skype

**New line**
2. Provide question and answer texts.

3. Switch answers input mode to the Rich Text.

4. Click the tools icon next to the appropriate answer choice.

5. Select the Import from URL option and input parameter name. It must be unique within a single survey. Repeat steps 4 through 5 to add multiple parameters.

6. Click Save to save changes and add URL Import tag.

   Note: Inserted tags will not be visible in the Rich Text mode. Mouse over on the tools icon or switch to the Standard mode to see if any tags are applied to answer choices.

7. Navigate to survey Launch section. In the Master survey URL field you will see modified survey master link. In this example: http://www.keysurvey.com/f/453611/1703/?LQID=1&LQID=1 notifies that one of your questions contains <import param="XXX"/> tag.

8. Now modify the Master Survey URL as follows:
   - Add string "XXX=NNN" in the end. Where XXX is the parameter name (as you have specified it in the tag inserted into the survey question) and NNN is the parameter value which will be stored as the answer to the survey question with the tag.
   - This string must be URL encoded. In our example modified master survey URL will look as follows: http://www.keysurvey.com/f/453611/1703/?LQID=1&NAME=Willa
     You can also modify the link automatically by means of your software. Then you can distribute Master Survey URL with your mail system.
9. To import data from URL into the Pick one or 'other', Pick one with 'comment', Dropdown box, Check all that apply, List box question types you need to insert tag `<import param="XXX"/>` in question text field manually.

10. To import data from URL into the 'other' or 'comment' fields of the Pick one question type, insert the `<import param="XXX"/>` tag into the answer text of these fields.
**Sub header**

This feature is used to split a question into section or several sections. Activate **Sub header** option next to the appropriate answer choice(s) while designing your survey question in **Rich Text** mode.

1. Create a new or modify existing **Check All that Apply** question.
2. Provide question and answer texts.
3. Switch answers input mode to the Rich Text.
4. Click on the tools icon next to the appropriate answer choice.
5. Select the **Sub header** option.

6. **Save** the question.

   **NOTE:** Inserted tags will not be visible in the **Rich Text** mode. Click the tools icon or switch to the **Standard** mode to see if any tags are applied to answer choices.

7. Click the **Preview** button to see how your question looks.

---

### Of the nine major benefits offered by a property constructed pension scheme, how many are in place with your existing plan?

- [ ] Income for retirement
- [ ] Death in service benefit
- [ ] Deferred retirement
- [ ] Tax free lumps
- [ ] Phased retirement
- [ ] Powers to 'loan back'
- [ ] Powers of self invest
New Column

This feature is used to split a question into several columns. This is commonly used for questions with a long answer lists. Activate New column option next to the appropriate answer choice(s) while designing your survey question in Rich Text mode.

1. Create new or modify existing question.
2. Provide question and answer texts.
3. Switch answers input mode to the Rich Text.
4. Click the tools icon next to the answer choice you want to put to the next column.
5. Activate the New column option.

6. Save the question.

NOTE: Inserted tags will not be visible in the Rich Text mode. Click the tools icon or switch to the Standard mode to see if any tags are applied to answer choices.

7. Click the Preview button to see how your question looks.

The following example has both Sub header and New column features activated:
Quota and Block

These features allow you to make representative sampling. This is used to set a limited number of respondents or block respondents who select a certain answer.

EXAMPLE SCENARIO

- You need to record results for a certain number of respondents belonging to three age categories:
  - 18 to 25
  - 26 to 40
  - 41 to 50
- In this case, you should set a limit of respondents for each category.
- Submitted responses will be added to the report, if they are within the allowed response range.
- Respondents who are out of the quota limit will be considered 'In Progress'.
- If the Master Link is used and 'Allow multiple responses' is set, no results are saved at all for out of range respondents.

1. Create new or modify existing question to apply quota. This can be question mentioned in the example scenario.
2. Provide question and answer texts.
3. Switch answers input mode to the Rich Text.
4. Click the tools icon next to the answer choice to set quota or block respondents who select those answer.

5. Activate the Quota option and indicate amount of respondents to meet quota criteria. Select the Block option to block particular respondents. For example: Respondents who are under 18 years old are not allowed to fill out the survey, so you can use the Block option.

6. Save the question.

NOTE: Inserted tags will not be visible in the Rich Text mode. Click the tools icon or switch to the Standard mode to see if any tags are applied to answer choices.
**Respondent’s Email**

This feature allows you to send ‘Email Alerts’ to survey respondents, even if they submit the survey via Master URL.

1. Create new question of the **Single-Line Text** type to ask respondents’ for their email address.

2. Provide question and answer texts.

3. Switch answers input mode to the **Rich Text**.

4. Click the tools icon next to the answer that asks respondents for the email address.

5. Select the **Respondent’s Email** option to activate automatic email tracking.

6. Click the **Save** button to save changes.

**NOTE:** Inserted tags will not be visible in the **Rich Text** mode. Click the tools icon or switch to the **Standard** mode to see if any tags are applied to answer choices.

- Now you can set an Email Alert and respondents will receive email notification even though they submit the survey via Master URL. For more details consult the **Email Alert** sub-section of this manual.

- If 'Email alert to respondent' has been set to the question with the Respondent’s Email option activated, and your survey has been distributed via our email system, email alert will be sent to the indicated email address instead of respondent’s actual email address where the survey was sent to in case those addresses are different.

- If respondents do not input an email addresses into an answer field, they will not receive an email alert.
**Calculated Value**

The feature can be applied to adjust the calculated values of the 'Single Line' and 'Numeric Allocation' fields.

1. Create new question of the **Single-Line Text** type to ask respondents' for their email address.
2. Provide question and answer texts.
3. Switch answers input mode to the **Rich Text**.
4. Click the tools icon next to the answer that will be used for calculation.
5. Indicate the calculation in the **Calculated Value** field.

**NOTE:** Please use the following values and operations when setting up the calculation values:

- References to text answers such as Single Line, Numeric Allocation and text columns of the 3D Matrix must be indicated by the Qx.Ay, Qx.Ay.Cz notations. In this case, in the voting process the notation will be replaced by the value entered by the respondent in the corresponding field.
- Qx and Qx.Ay references to the Dropdown, Pick One or Other, Pick one with Comment and Rate different items, (with a Custom Scale applied) questions types, in the process of voting the formula reference will be replaced by the numeric value which corresponds to the selected answer option of the question.
- The symbols of arrhythmic operations are: +, -, *, /.
- Numeric constants (integer or decimal values).
- The SCORE (x, y) function will return the current number of points scored by the respondents in the section of questions which is specified by the numbers x and y.
- The MAX_SCORE (x, y) function will return the maximum number of points accumulated by the user in the section of questions which is specified by the numbers x and y.
- Upon the specification of the syntax, the formula will be checked prior to application. Incorrect formulas will not be performed.
Review

This feature allows respondents to review their answers before submitting their survey. You can use this feature in your survey questions, survey header or footer, ‘Thank You’ page, survey name and title. Let’s see an example of utilizing this feature within a survey question.

1. Insert a Section Header question type at the very end of your survey.
2. Provide text that invites respondents to review their answers.
3. Select the text you want to appear as a link and click the Review Link button.

4. Click Save to save your question. This link allows respondents to review a survey before submitting:

Employee details

<table>
<thead>
<tr>
<th>Employee Name:</th>
<th>William</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Email:</td>
<td><a href="mailto:william.morrell@worldapp.com">william.morrell@worldapp.com</a></td>
</tr>
<tr>
<td>Employee ID:</td>
<td>123456</td>
</tr>
<tr>
<td>Job Title:</td>
<td>SSE</td>
</tr>
<tr>
<td>Date:</td>
<td>01/10/2012</td>
</tr>
<tr>
<td>Department:</td>
<td>SE</td>
</tr>
<tr>
<td>Manager:</td>
<td>MC</td>
</tr>
</tbody>
</table>

**Review Period:**

<table>
<thead>
<tr>
<th>From</th>
<th>12/10/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>01/10/2012</td>
</tr>
</tbody>
</table>

**Communication**

- Management does a good job communicating about changes or decisions that affect employees.
- I am able to contact Senior Management when needed.
- I have enough information to do my job well.
- Managers communicate a clear sense of direction for my organization.

Click **HERE** to review your answers before submitting.
Additional Notes:

- The best position of a question with this tag is at the end of the survey.
- If respondents have already completed the survey, they can look through the results on all the pages of the survey despite the position of the question with this tag, (beginning or middle of the survey).
- Keep in mind, while reviewing the survey, respondents cannot make any changes. After checking the results, they can close the window to return to the survey and make any changes they need.
- If you do not want to allow your respondents to change the answers they have entered, you can do it by using the features below:
  
  1. From the survey Settings page activate 'Do not allow respondent back into survey' and select 'Do not show back button' option.
  
  2. Insert a REVIEW link on the last page of the survey into the last survey question or into the Thank You page.
**Save and Finish Later**

You can allow your survey respondents to save intermediate results and come back to their surveys later not only with the help of default Save button but with the special ‘Save and Finish Later’ functionality as well. This feature is most useful if your survey contains multiple pages, large amount of questions and it takes a long time for respondents to fill out.

1. Click Survey Header and Footer button on the ribbon toolbar of the Edit Survey page.

2. Turn off the WYSIWYG editor if it is activated, then insert `<save param="Save and Finish Later"/>` tag in the footer text field area.

3. Click the Save button to save changes and go back to the Edit Survey page.

**NOTE:**

- The button that saves intermediate results will appear instead of this tag
- The button may also be activated from the survey settings page.
- You can use any text for your button instead of ‘Save and Finish Later’.
- By hitting this button respondents save their surveys ignoring mandatory questions that are set as ‘Must Answer’
- It is not recommended to use ‘Do not allow respondent back into survey’ rule set on the survey Settings page, because respondents will not be able to come back to their survey and finish it later.
Creating a Survey

This is how the survey looks in preview mode:

**Employee details**

- Employee Name:
- Employee Email:
- Employee ID:
- Job Title:
- Date:
- Department:
- Manager:

Next

"Save and Finish Later"
Advanced Survey Features

- Copy One Question
- Copy Questions From Another Survey
- Survey Inline Editing
- Adding Internal Notes
- Customizing Welcome Back message
- Creating a Thank You Page
- Creating a Survey Footer
- Creating a Multilingual Survey
- Converting your Survey to PDF Format
- Using E-mail Alerts
- Managing E-mail Alerts
Copy One Question

Use this feature to copy a specified question within a survey. While copying you can specify its destination location within the current survey.

1. Click **Copy** next to the question you want to copy on the *Edit Survey* page.

2. Select question position which can be before or after the certain survey question.

3. Choose from the drop down box the question from your current survey that will precede or come after your copied question.

4. Click **Save** to copy your question.

5. Click **Back** to return to the *Edit Survey* page without copying question.
Copy Questions From Another Survey

Use this feature to copy questions from any survey on your account or from the question library into the survey you are working on at the moment.

1. Go to the Edit Survey page, click Insert dropdown box at the place where you want to insert questions. Then select the Copy from another survey option.

2. Select a survey you want to copy the question from (step 1). You can browse within the Frequently asked questions section.

3. If you are not sure which survey contains the question(s) you need, you can search the surveys on your account. Enter a word or a phrase to look for into the Find Questions field (step 2).

4. Click Go to start the search.

5. Select questions you want to copy. The Check All option allows selecting all questions at once.

6. Click Copy to insert the selected question into your survey.
**Survey Inline Editing**

When you created your survey and added questions to it you can quickly and easily edit survey elements such as survey name, title, description, questions and answer options without navigating to the editing pages.

1. Mouse over on the element you want to edit so the 🆒 icon appears and click it.

2. Edit selected element text.

3. Confirm or discard changes by clicking the appropriate button.
Adding Internal Notes

This feature allows you to enter comments to respondent's results. Internal notes are always hidden from respondents and can be edited in the Summary Report.

1. To add Internal Notes, click the **Messages -> Internal Notes** button on the **Edit Survey** page.

2. Type a title for your Internal Notes in the text field. Keep in mind that you can use HTML.

3. Click **Spell Check** to check the spelling of the input text.

4. Click **Preview** to see how your Internal Notes look.

5. Click **Clear** if you want to remove all the text from the field.

6. Click **Save** to save your changes and return to the **Edit Survey** page.

**Internal Notes** section will be added to the **Summary Report** of your survey but will not be displayed to survey respondents. You can then add individual notes per each submitted response in the **By Respondent Report**.
Customizing the Welcome Back message

Using this feature you can customize the survey’s Welcome Back message when respondents come back to the survey after they submit it.

1. From the Edit Survey page click the Messages -> Welcome Back button.

2. Input texts for the Welcome Back heading and message into the appropriate fields depending on the rule set for your survey on the Settings page. You can use HTML to edit your text appearance or activate the WYSIWYG editor to use its tools for text customization.
3. Click **Save** to save your changes.

When respondents attempt to access the survey after submit:

- If the rule is set to 'Do not allow respondent back into survey'

  ![Thanks for coming back!](image)

  This survey has already been submitted. Thank you.

- If the rule is set to 'Respondent may return and modify their response'

  ![Welcome back!](image)

  It appears you may want to change or add some answers in your recently completed survey. Go right ahead. Your new survey responses will replace the old ones. Thanks again.

  [Next]
Creating a Thank You Page

This feature allows you to create a Thank You Page, which is shown to respondents after submitting the survey. Use this feature to thank respondents for taking the survey or for imparting any final information you want the respondent to have.

1. To add a Thank You Page to the end of your survey, click the Messages -> Thank You button on the survey Edit Survey page.

2. Type the text of your message in the text field. You can switch to the WYSIWYG mode to perform advanced text formatting. When designing a Thank You Page in a simple editing mode you can use both Piping and HTML coding.
3. Click **Spell Check** to check the spelling.
4. Click **Preview** to see how your Thank You Page looks.
5. Click **Clear** to remove all the text from the text field.
6. Click **Save** to save your edits and return to the **Edit Survey** page.

---

**Employee Review Survey**

Thank you for being willing to participate in this survey!
Creating Survey Header and Footer

This feature allows you to add a header and a footer to your survey. This feature is used to add additional information at the top and at the bottom of your survey (for example, Copyright).

1. Click the Survey Header and Footer button on the Edit Survey page.

2. Enter the text of the header and footer in the text field (steps 1–3). If you import some data within your survey using Autofill feature you can use [Fx] tags to pipe autofilled information to survey header and footer. For details, see [Fx] tag within Email Body section of this manual.

3. Click Toggle WYSIWYG Editor to switch to the WYSIWYG mode and perform advanced text formatting such as alignment, font customization and many others.

4. Click Spell Check to check the spelling.

5. Click Clear to remove all the text.
6. Click **Save** to save your changes and return to the *Edit Survey* page.

**Survey Header and Footer Preview**

---

**Employee Review Survey 2013 - Logical transitions**

Employee information section.

Please enter the details for the user:

- Employee Name:
- Employee Email:
- Employee ID:
- Job Title:
- Data:
- Department:
- Manager:
Creating Multilingual Survey/Forms

This feature allows respondents to select the language of their survey/form. Use this option for designing surveys with the same questions, in different languages. The report will be in the default language.

1. Create new survey or edit the existing one.
2. Click the Multilingual button on the ribbon toolbar on the top of the Survey/Form Edit page.
3. Select needed languages to create the survey in. Add more languages by clicking on the Add language if needed and Proceed next.
4. Edit the language selection question text if you would like to.

5. **NOTE:** If you forgot to add some languages or want to replace already added with other ones, feel free to re/type languages in answer options fields and then select respective language:
   - Activate the **Rich Text** input mode.
   - Click the tools icon next to needed answer choice.
6. Select the **Language Selection** option and choose appropriate language from the dropdown list. Repeat this step for each language in your list you would like to add or edit.

![Language Selection dropdown](image)

7. Click **Save** to save your question.

![Survey page](image)

8. From the Edit Survey page select the Must Answer option next to this question to make it mandatory.

9. Select the **New page** option after that question.
10. The Multilingual button is now highlighted on the top of the Edit Survey page. Click it to go to the Survey Translation page.

![Survey Translation Page]

11. The ‘Select language for translation’ dropdown box will contain as many languages, as you added them when creating language questions. You will need to provide translations for each of them.

12. Key Survey supports system messages for about 40 languages. Select language for alert messages from the step 2.

13. Provide translations for each survey element:
   - Survey Name
   - Survey Title
   - Survey Introduction
   - Welcome Back Page
   - Question and Answer texts
   - Survey invitation email and survey reminder email texts
   - You will also be able to translate texts for other options when they are activated, such as survey header and footer, survey thank you page and others.

14. Click Save to save your changes.

   NOTE: All translations will be reset upon modifying the answer option order of the language question.
Multilingual Survey Example:

Please select your language

- English
- Russian
- Spanish

Многоязычная анкета.

Не хотите бы вы принять участие в данном аукционе?

- Да.
- Нет.
- Может быть.
- Не в данном.
- Меня может заинтересовать следующий.
Converting your Survey to PDF Format

You can convert a survey into a PDF format. All questions are converted with the corresponding instructions. Questions are divided and carried forward if they do not fit the page. Later you can print it and use as a paper survey.

Keep in mind, different question types are converted to PDF format in different ways:

- Dropdown Box questions are converted to PDF as a Pick One question type.
- List Box questions as a Check All That Apply.
- Numeric Allocation questions as Single Line Text with Pre-Format Option.
- Rate Different Items Along the Scale of Your Choice questions have a legend if the headings are too long.

1. On the Home Page, select the survey you want to print out, then click the Print button from the Survey Information pane in the right.

2. You can convert either in black and white format or in color format. Click on the Convert button for that.
1. Open PDF copy of your survey to preview right away or save it locally.
2. Click Close to close the Convert to PDF pop-up window.

Survey converted to black and white PDF format:
Tasks Definition

The Tasks Definition functionality is a powerful tool which is capable of providing you with the ability:

- of creating tasks, procedures as well as processing them accordingly within the system.
- to import tasks by uploading a text file.
- of pre-populating forms which are associated with the task.
- to initiate tasks upon completion of the form, as well as linking task resolutions to the form completion process.
- of applying due dates to tasks.
- to synchronize tasks with the offline application.

In order to apply the Tasks functionality follow the steps below:

1. Access the Tasks feature.
2. Click on the here link to create your first Task Definition.
3. Input a unique name for the task definition.
4. Modify the list of available statuses/resolutions for the task by pressing Add Status or the Add Resolution button.
5. Specify the contact group of the potential assignees by clicking on the 'Select contact group' link.

6. If you require making a form submission mandatory in the process of task execution activate the 'As a part of the task require to fill out a form or a section of the form' feature and select the form from the list.

7. Activate the 'Display unassigned tasks with 'Assign to me' option' feature if you wish to assign yourself all of the unassigned tasks.

8. Activate the 'Require a due date' feature if a due date is one of your requirements.

9. Assign additional workflow logic rules based on task actions.

10. Press the Back button.

NOTE:

- It is possible to separate tasks with the aid of Filter creation, which can be achieved by selecting the associated task definition, clicking the New button and choosing the corresponding option.
- Upon the creation of a task, an “Unassigned” Filter is automatically created for all tasks which have not been assigned to a particular user.
- In the case of a due date being specified upon task creation, the automatically created “Overdue” filter will be used for all of the following tasks which have not been closed in a timely manner.
- By default, all new tasks include the Open and Closed status which cannot be deleted.
- Due date must be in the yyyy-mm-dd or mm/dd/yyyy format.
### Employee Review Survey
Annual Review Employee Survey

#### Employee details
- **Employee Name:**
- **Employee Email:**
- **Employee ID:**
- **Job Title:**
- **Date:**
- **Department:**
- **Manager:**

#### Review Period:
- **From:**
- **To:**

#### Communication
- **☐ Management does a good job communicating about changes or decisions that affect employees**
- **☐ I am able to contact Senior Management when needed**
- **☐ I have enough information to do my job well**
- **☐ Managers communicate a clear sense of direction for my organization**
Testing options

Preview mode not only allows you to test your survey and report in the exact way it works for respondents and with actual data but also provides controls for combining survey options during test.

To open the survey in a test mode follow the next steps:

1. Once logged into account select the survey you would like to test and double-click on its name or click on the Edit button next to it.

2. Click on the arrow next to the Preview button on the ribbon toolbar and select the Test Survey option.

On the bottom of the test screen you can see the functional toolbar with multiple controls.

All visible survey questions are shown in the dropdown (1). Click on it to see a questions list split in pages and additional options (logic, data validation) applied. Select a question to proceed to and click on the Go button (2).

In Testing mode you can also enable or disable additional survey features, such as showing question numbers (3), Must Answer questions and special formats validation (4), active Email alerts (5) or Workflow plugins applied (6). Also, if you are testing a Multilingual survey it is possible to test it in any language it was created in by selecting respective option in the dropdown on a right (7).

To minimize this pane during testing click on the Hide button (8). Later on, to bring it back click on the Show button at the same place.
III – DISTRIBUTING THE SURVEY

- Launching the Survey
- Emailing your Survey
- Advanced Launch Features
- Education Package
- Launching the Survey through Sales Force

Launching the Survey

- Launch Survey Page
- Customizing the Survey URL
- Securing your Survey Connection
- List of Time Zones
Creating a Survey

Launch Survey Page

On this page, you can set the period and method of survey distribution.

1. From the Home Page select the survey from the list and click Launch from the Survey Information pane in the right.

2. The Link Type option allows you to use keysurvey.com domain name in a survey link, mask it and show an IP address or show any other domain name (step 1). Consult the Customize URL subsection of this section to learn more about masking keysurvey.com or Key Survey IP address link.

3. Select the Secure connection option (step 2) to secure the data obtained during the survey by encrypting it. For more information, see the Secure Connection section of this manual.
4. In the **Master Survey URL** text box (step 3), the master link of your survey is displayed. You can copy this URL and paste it as a link on your website.

**NOTE:** This is a general survey link; therefore, if you email it to your respondents, responses will be anonymous or overwritten (depending on your survey settings). Use our email distribution system to email your survey. In this case, a unique link is automatically generated for each respondent.

For more information, see the Secure Connection section of this manual.

5. Set the survey date and time information using the following fields and dropdown boxes (step 4):

- **Start Survey** – Select the date and time you want this survey to become activated, relative to EST time zone. For details, consult the Time Zones section of this manual.
- **End Survey** – Select the date and time you want this survey to end, relative to EST time zone.
- **End Survey When the completed number equals** – Automatically stops survey, when responses reach indicated number. To save your input, click **Save**.
- **Time Limit Close and submit after X mins** – You can set time limits for respondents to fill in the survey. When the time is up, the survey is submitted automatically. To save your input, click **Save**. For additional information, see the **Education Package** section of this manual.
- **Send Expire Alert** – Select this option and click the **Edit Email** button to compose your alert message to be notified in a week before the survey gets expired. Thus you can prolong the survey activeness period.

6. Step 5 lists you survey distribution methods. Click the **Go** button next to method you prefer:

- **E-mail survey distribution** – Allows you to email the survey to addresses you enter manually, addresses you import from data sources, addresses from your address book or people from one of the Contact Managers. For more information, see the Email Survey, Email survey to list and Email Survey to People from Contact Manager sections of this manual.
- **Password survey protection** – Allows you to secure your survey with individual passwords. For more information, see the **Password security** sections of this manual.
- **Upload responses** – Allows you to upload responses to your survey. It is often used if data is collected by means of paper surveys, so you can import that data into your account for reporting purposes afterwards. For more information, see the **Upload Responses** section of this manual.
- **HTML code** – Provides your Webmaster with automatically generated HTML code, which includes a link to this survey or a pop-up survey. Use this option when you want to gather survey responses from visitors or from one of each “X” visitors to your company’s website. For more information, see the Link to Survey, Pop-Up Survey and HTML Survey Code sections of this manual.
- **Salesforce.com integration** – Allows you to synchronize data between the survey and the Salesforce.com objects as well as to distribute surveys with the help of Salesforce.com facilities.
- **Publish on Participant Portal** – This distribution method allows you to post a survey to Participant Portal where respondents can access all surveys they are intended to fill out at once.

**Additional Notes:**

- If your survey has been distributed via our email system partially completed so-called In Progress responses can be saved and included in a report.
• If you need to get partially completed responses that has not been distributed via our email system and include them into a report, you should set ‘Do not allow respondent back into survey’ or ‘Respondent may return and modify their response’ rules on the survey Settings page.

• When taking the survey via Master URL, cookies are used to identify the respondents.
Customizing the Survey URL

This feature allows you to mask keysurvey.com and use your own domain name in the survey link.

1. Select the ‘Customize URL’ option (step 1).

   1. Select link type
      - Keysurvey URL
      - IP address
      - Customize URL
   
   Enter custom URL below: Click here for details
   yourdomain.com/yourpage.html

   2. Master Survey URL You may copy and paste the URL below
      http://www.keysurvey.com/f/588822/688e/

   3. Start Survey
      2014-01-29 6 AM EST
      End Survey
      2014-03-01 6 AM EST
      End Survey
      When the completed number equals
      no limit
      Time limit
      Close and submit after
      min
      Send expiry alert
      Edit Expiry

   4. Select survey distribution method and click ‘Go’
      - Email survey distribution
      - Password survey protection
      - Upload responses
      - HTML code
      - Salesforce.com integration
      - Publish on Participant Portal

2. Input the custom URL (your domain name and the webpage name) where the survey will be located.

3. Click Save to save your new survey link.

4. To make this link work, ask your Webmaster to insert the SCRIPT (located on the next pages) into the body of the webpage you have indicated.

5. If you are planning to create a new page for your survey, use the SOURCE code (located on the next pages).

NOTE: You will need to add this script or webpage only once and it will work for all your surveys. Just select the ‘Customized URL’ option and specify the domain and the webpage name.
Creating a Survey

Source

<html>
<head>
<meta http-equiv="X-UA-Compatible" content="IE=edge" />
<link rel="stylesheet" media="all" type="text/css" href="/style/structure.css?v=8.3"/>
<link rel='stylesheet' type='text/css' href='/style/css/global.css'>
<!--[if IE]>
<link rel="stylesheet" media="all" type="text/css" href="/style/ie.css?v=8.3"/>
<![endif]-->
<!--[if IE 8]>
<link rel="stylesheet" media="all" type="text/css" href="/style/ie8.css?v=8.3"/>
<![endif]-->
<script type="text/javascript" src="/js/vendor/ks.libs.js?v=8.3"></script>
<script type='text/javascript'>
function MM_swapImage()
{ var i,x,a=document.MM_sr; for(i=0;a&amp;&amp;i<a.length&amp;&amp;(x=a[i])&amp;&amp;x.oSrc;i++) x.src=x.oSrc; }
function MM_swapImageRestore()
{ var i,x,a=document.MM_sr; for(i=0;a&amp;&amp;i<a.length&amp;&amp;(x=a[i])&amp;&amp;x.oSrc;i++) x.src=x.oSrc; }
function MM_findObj(n, d)
{ var p,i,x; if(!d) d=document; if((p=n.indexof('?'))&gt;0&amp;&amp;parent.frames.length)
{d=parent.frames[n.substring(p+1)].document; n=n.substring(0,p);} if(!x=d[n])&amp;&amp;d.all) x=d.all[n]; for (i=0;i&lt;d.forms.length;i++) x=d.forms[i][n];
for(i=0;i&lt;d.layers.length;i++) x=MM_findObj(n,d.layers[i].document);
if(x &amp;&amp; document.getElementById) x=document.getElementById(n); return x; }
function MM_swapImage()
{ var i,j=0,x,a=MM_swapImage.arguments; document.MM_sr=new Array; for(i=0;i&lt;(a.length-2);i++)
if ((x=MM_findObj(a[i]))!=null){document.MM_sr[j++]=x; if(!x.oSrc) x.oSrc=x.src; x.src=x.oSrc; x.src=a[i+2];}
} /*
* name - id HTML object
* hide - (true|false)
*/

function MM_Hidelayer(name,hide)
{
  var obj = document.getElementById(name);
  if(obj!=null)
  {
    var v = (hide)?'hidden':'visible';
    obj.style.visibility = v;
  }
}

function AfterStart()
{
  MM_Hidelayer("wait_div",true); /*AfterStart*/
}
//-->
</SCRIPT>
</head>
<BODY onLoad="javascript:AfterStart();">
<script type='text/javascript'>
<!-- Begin//write out the loading message in a <div> layer

var my_page = '<div align="center" id="wait_div" style="position:absolute;left:0;top:0;border:0px none #000000;z-index:100;height:100%;width:100%;background-color:#FFFFFF;layer-background-color:#FFFFFF;visibility:visible;">;

my_page+='<div id="layer1" style="position:absolute;z-index:1001;left:42%; top:40%">

my_page+='<b><FONT Face="arial Bold, Helvetica, sans-serif" size="4" Color="#0333FF">';

my_page+='<table><tr><td><font color="blue" size="10">loading...</font></td></tr></table>'; //GIF IMAGE

animation include here

my_page+='</font></b></div></div>');?></div>

if(document.all) document.write(my_page);

x=window.location;
xsrc=unescape(x);
x=xsrc.toLowerCase();
Creating a Survey

```javascript
indOfSur=(''+x).indexOf("sid=");
indOfPwd=(''+x).indexOf("pwd=");
indOfNext=(''+x).indexOf("&");
indOfLQID=(''+x).indexOf("lqid=");
if (indOfNext<0) indOfNext=(''+x).length;
SID=(''+x).substr(indOfSur+4,indOfPwd-indOfSur-4);
PWD=(''+x).substr(indOfPwd+4,indOfNext-indOfPwd-4);
PARMS="";
if (indOfLQID>0) PARMS=(''+xSrc).substr(indOfLQID+6);
y="";
if (indOfSur>0 && indOfPwd>0) y="http://216.34.99.34/survey/"+SID+"/"+PWD+"/"+"?logo=1";
indOfPwd2y=(''+y.toLowerCase()).indexOf("pwd2=");
indOfPwd2x=(''+x.toLowerCase()).indexOf("pwd2=");
withoutPwd2=(''+y).substr(0,indOfPwd2y-2);
if (indOfSur>0 && indOfPwd>0 && indOfPwd2x>0) {
  if (indOfLQID>0) window.location=withoutPwd2+"/?logo=1&LQID=1&"+(''+x).substr(indOfPwd2x,(''+x).length-indOfPwd2x)+PARMS;
  else window.location=withoutPwd2+"/?logo=1&"+(''+x).substr(indOfPwd2x,(''+x).length-indOfPwd2x);
}
if (indOfSur>0 && indOfPwd>0 && indOfPwd2x<0) {
  if (indOfLQID>0) window.location="http://216.34.99.34/survey/"+SID+"/"+PWD+"/"+"?logo=1&LQID=1"+PARMS;
  else window.location="http://216.34.99.34/survey/"+SID+"/"+PWD+"/"+"?logo=1";
}
indOfSurveyID=(''+x.toLowerCase()).indexOf("surveyid=");
indOfReportID=(''+x.toLowerCase()).indexOf("reportid=");
indOfpw=(''+x).indexOf("pw=");
SurveyID=(''+x).substr(indOfSurveyID+9,indOfReportID-indOfSurveyID-9);
ReportID=(''+x).substr(indOfReportID+9,indOfpw-indOfReportID-9);
pw=(''+x).substr(indOfpw+3,(''+x).length-indOfpw);
if (indOfSurveyID>0 && indOfpw>0)
```
window.location="http://216.34.99.34/Member/Public/report.jsp?SurveyID="+SurveyID+"&ReportID="+ReportID+"&pw="+pw+"&logo=1";
}
// End -->
</script>
<!-- FUNCTION_CLOSEWINDOW -->
<!-- Caption page -->
</body>
</html>
Securing your Survey Connection

This advanced feature allows you to secure all survey data by encrypting it. Encryption is the scrambling of data, into a code that is unreadable to anyone who does not have the key to decipher it. Only you and our server have the key to unlock your code. All your account information is protected by 128-bit encryption to maintain the privacy and confidentiality of your data. To take advantage of encryption technology, you will need to obtain a secure browser, one that supports 128-bit encryption.

1. To use a Secure Connection option in your survey, select Secure Connection on the Survey Launch section or Publish Report page.

Additional Notes:

• You cannot use both the Secure Connection and Customized URL options at the same time.
• SSL does not support https (secure) connections with IP address. If you need to establish a secure Internet connection, you need to use domain name instead of IP address.
• If your survey contains links to images or other objects that are not located on our server, respondents may get alert messages saying that the page contains both secure and non-secure items. In this case, you might want to inform your respondents beforehand, that all the information is sent via a secure connection and cannot be easily read by a third party, and only images or other embedded objects are sent via non-secure connections.
• When opening a secure link, respondents may get alert messages saying that the page they enter is secure. Only respondents can turn off this alert from their side.
• Depending on browser types and their settings, there might be pop-up confirmation messages informing your respondent that the data he or she enters in the forms will be sent via secure connection.

NOTE: It is not possible to turn off such message in some of the browsers.
## List of Time Zones

This page contains the list of time zones relative to EST (Eastern Time). Consult this table when setting start time and end time for your survey on the Launch Survey page.

<table>
<thead>
<tr>
<th>Time</th>
<th>Time Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>EST -7:00</td>
<td>International Date Line West</td>
</tr>
<tr>
<td>EST -6:00</td>
<td>Midway Island, Samoa</td>
</tr>
<tr>
<td>EST -5:00</td>
<td>Hawaii</td>
</tr>
<tr>
<td>EST -4:00</td>
<td>Alaska</td>
</tr>
<tr>
<td>EST -3:00</td>
<td>Pacific Time (US &amp; Canada); Tijuana</td>
</tr>
<tr>
<td>EST -2:00</td>
<td>Arizona</td>
</tr>
<tr>
<td>EST -2:00</td>
<td>Chihuahua, La Paz, Mazatlan</td>
</tr>
<tr>
<td>EST -2:00</td>
<td>Mountain Time (US &amp; Canada)</td>
</tr>
<tr>
<td>EST -1:00</td>
<td>Central America</td>
</tr>
<tr>
<td>EST -1:00</td>
<td>Central Time (US &amp; Canada)</td>
</tr>
<tr>
<td>EST -1:00</td>
<td>Guadalajara, Mexico City, Monterrey</td>
</tr>
<tr>
<td>EST -1:00</td>
<td>Saskatchewan</td>
</tr>
<tr>
<td>EST</td>
<td>Bogotá, Lima, Quito</td>
</tr>
<tr>
<td>EST</td>
<td>Eastern Time (US &amp; Canada)</td>
</tr>
<tr>
<td>EST</td>
<td>Indiana (East)</td>
</tr>
<tr>
<td>EST +1:00</td>
<td>Atlantic Time (Canada)</td>
</tr>
<tr>
<td>EST +1:00</td>
<td>Caracas, La Paz</td>
</tr>
<tr>
<td>EST +1:00</td>
<td>Santiago</td>
</tr>
<tr>
<td>EST +1:30</td>
<td>Newfoundland</td>
</tr>
<tr>
<td>EST +2:00</td>
<td>Brasilia</td>
</tr>
<tr>
<td>EST +2:00</td>
<td>Buenos Aires, Georgetown</td>
</tr>
<tr>
<td>EST +2:00</td>
<td>Greenland</td>
</tr>
<tr>
<td>EST +3:00</td>
<td>Mid-Atlantic</td>
</tr>
<tr>
<td>EST +4:00</td>
<td>Azores</td>
</tr>
<tr>
<td>EST +4:00</td>
<td>Cape Verde Is.</td>
</tr>
<tr>
<td>EST +5:00</td>
<td>Casablanca, Monrovia</td>
</tr>
<tr>
<td>EST +5:00</td>
<td>Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London</td>
</tr>
<tr>
<td>EST +6:00</td>
<td>Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna</td>
</tr>
<tr>
<td>EST +6:00</td>
<td>Belgrade, Bratislava, Budapest, Ljubljana, Prague</td>
</tr>
<tr>
<td>EST +6:00</td>
<td>Brussels, Copenhagen, Madrid, Paris</td>
</tr>
<tr>
<td>EST +6:00</td>
<td>Sarajevo, Skopje, Warsaw, Zagreb</td>
</tr>
<tr>
<td>EST +6:00</td>
<td>West Central Africa</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Athens, Beirut, Istanbul, Minsk</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Bucharest</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Cairo</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Harare, Pretoria</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius</td>
</tr>
<tr>
<td>EST +7:00</td>
<td>Jerusalem</td>
</tr>
<tr>
<td>Time</td>
<td>Time Zone</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>EST +8:00</td>
<td>Baghdad</td>
</tr>
<tr>
<td>EST +8:00</td>
<td>Kuwait, Riyadh</td>
</tr>
<tr>
<td>EST +8:00</td>
<td>Moscow, St. Petersburg, Volgograd</td>
</tr>
<tr>
<td>EST +8:00</td>
<td>Nairobi</td>
</tr>
<tr>
<td>EST +8:30</td>
<td>Tehran</td>
</tr>
<tr>
<td>EST +9:00</td>
<td>Abu Dhabi, Muscat</td>
</tr>
<tr>
<td>EST +9:00</td>
<td>Baku, Tbilisi, Yerevan</td>
</tr>
<tr>
<td>EST +9:30</td>
<td>Kabul</td>
</tr>
<tr>
<td>EST +10:00</td>
<td>Yekaterinburg</td>
</tr>
<tr>
<td>EST +10:00</td>
<td>Islamabad, Karachi, Tashkent</td>
</tr>
<tr>
<td>EST +10:30</td>
<td>Chennai, Calcutta, Mumbai, New Delhi</td>
</tr>
<tr>
<td>EST +10:45</td>
<td>Katmandu</td>
</tr>
<tr>
<td>EST +11:00</td>
<td>Almaty, Novosibirsk</td>
</tr>
<tr>
<td>EST +11:00</td>
<td>Astana, Dhaka</td>
</tr>
<tr>
<td>EST +11:00</td>
<td>Sri Jayewardenepura</td>
</tr>
<tr>
<td>EST +11:30</td>
<td>Rangoon</td>
</tr>
<tr>
<td>EST +12:00</td>
<td>Bangkok, Hanoi, Jakarta</td>
</tr>
<tr>
<td>EST +12:00</td>
<td>Krasnoyarsk</td>
</tr>
<tr>
<td>EST +13:00</td>
<td>Beijing, Congaing, Hong Kong, Urumqi</td>
</tr>
<tr>
<td>EST +13:00</td>
<td>Irkutsk, Ulaan Batar</td>
</tr>
<tr>
<td>EST +13:00</td>
<td>Kuala Lumpur, Singapore</td>
</tr>
<tr>
<td>EST +13:00</td>
<td>Perth</td>
</tr>
<tr>
<td>EST +13:00</td>
<td>Taipei</td>
</tr>
<tr>
<td>EST +14:00</td>
<td>Osaka, Sapporo, Tokyo</td>
</tr>
<tr>
<td>EST +14:00</td>
<td>Seoul</td>
</tr>
<tr>
<td>EST +14:00</td>
<td>Yakutsk</td>
</tr>
<tr>
<td>EST +14:30</td>
<td>Adelaide</td>
</tr>
<tr>
<td>EST +14:30</td>
<td>Darwin</td>
</tr>
<tr>
<td>EST +15:00</td>
<td>Brisbane</td>
</tr>
<tr>
<td>EST +15:00</td>
<td>Canberra, Melbourne, Sydney</td>
</tr>
<tr>
<td>EST +15:00</td>
<td>Guam, Port Moresby</td>
</tr>
<tr>
<td>EST +15:00</td>
<td>Hobart</td>
</tr>
<tr>
<td>EST +15:00</td>
<td>Vladivostok</td>
</tr>
<tr>
<td>EST +16:00</td>
<td>Magadan, Solomon Is., New Caledonia</td>
</tr>
<tr>
<td>EST +17:00</td>
<td>Auckland, Wellington</td>
</tr>
<tr>
<td>EST +17:00</td>
<td>Fiji, Kamchatka, Marshall Is.</td>
</tr>
<tr>
<td>EST +18:00</td>
<td>Nukualofa</td>
</tr>
</tbody>
</table>
Emailing your Survey

- Composing and Testing your Email Message
- Manually Selecting Email Addresses
- Distributing to an Email List
- Email to people from Contact Manager
- Email Address Verification

1. To email the survey to respondents use the **Email Survey Distribution** method.

2. This option can be accessed from the survey **Launch** section by click the **Go** button.
Composing and Testing your Email Message

This feature allows you to edit your email, compose your message, indicate ‘from’, ‘reply’, ‘undelivered’ email addresses, attach documents etc.

This feature is used to make the email appear as if it were coming from some other email address than that indicated in your personal account, have replies routed to the proper departments and attach documents which people can then comment on in your questionnaire.

1. To compose your invitation or reminder email click the Edit Email button on one of the following pages:
   - 'Email Survey'
   - 'Email Survey to List'
   - 'Email Survey to People from Contact Manager'
   - 'Email 360 Survey'
   - 'Email Alert'
   - 'Email Reminder'
   - 'Email Report'
   - 'Email Participation Report'

1. Email Letter
   From: dmytro.khomenko@worldapp.com
   Subject: USA State Capital Analysis
   Body: NOTE: This is placeholder text. You must delete this text and

   [Edit Email]

   2. Email survey to addresses I enter manually
   - Import email list for bulk survey distribution
   - Email survey using address book
   - Email survey to people from Contact Manager

3. Enter the email addresses below Tip...

4. Verify Email Addresses

5. Capture respondent email address
   - All respondents to remain anonymous

6. Send Email
2. Indicate an address for your email in the 'From' field. By default the 'From' email address is the address associated with your account. You can also include a name along with the email address. To do this use the following format: "John Smith"<john.smith@domain.com>

3. Reply emails, if any, will be sent to the 'From' email address by default. Click the Send Reply to link to roll over the 'Send replies to' field to indicate different email address for reply emails.

4. Write the subject of your email in the 'Subject' field. The email subject should be as interesting and powerful as possible in order to ensure your email is opened. It is the first thing recipients read. Make sure it is clear and state the purpose of your survey, report, reminder or alert email.

5. Click the 'Attach files' option to attach a document to your email when sending your survey or report, setting up an email alert to respondents. File size should be under 4 MB.

6. Rich Text Editor allows you to compose your email in the WYSIWYG mode. Turn it off to customize email using pure HTML.

7. The email body contains default placeholder text. You must delete this text and write an invitation in its place, asking respondents to participate in your survey or to view your report.

   • In a warm inviting tone, ask the respondent to take the survey or view the report.

   • You can use the following tags in the body of your invitational text:
     - [S] – to insert the survey name as a hyperlink
     - [S_text] – to insert the survey name as a text
     - [ST] – to insert the survey title as a hyperlink
     - [ST_text] – to insert the survey title as a text
     - [URL] – to insert the hyperlinked web URL of the survey
     - [URL_text] – to insert the web URL of the survey as a plain text
     - [REMOVE] and [REMOVE lang="xx"]– to insert a link (or a link in the specified language) to allow respondents to remove their email addresses from your list.
     - [REMOVE:some text] - to insert any linked text that allows respondents to remove their email addresses from your list.
     - [REMOVE_URL] and [REMOVE_URL_text] insert URL (linked or not linked respectively) that leads respondents to page where they can remove their email address from your list.
• [Fx] – to insert data pre-populated by means of the Autofill feature that is used along with the Email Survey Distribution method.
[CM:Field Name] – to insert contact’s personal data from the Contact Manager if the survey is launched to people from the Contact Manager.

The following tags are used for the 360 Survey distribution only:
[P] – use this tag to insert link to a Participant Portal. Here recipients can access all surveys where they appear participants in.
[SURVEYLIST] – this tag is usually used if you want to stress on particular surveys to be filled out by your participants. It is substituted by the list of hyperlinked names of surveys selected for a campaign.
[URLLIST] – In addition to hyperlinked names of surveys you can paste list of URLs to the surveys using this tag.

8. The survey link that appears in the respondent’s email is unique to each recipient; therefore, your recipients should not forward it, unless they want to delegate the survey to another person.

• If the recipient wants others to evaluate the survey too, you must email them the Master URL (as it appears on the survey Launch section).
• If you do not use the survey link tags – [S] or [URL], a unique survey link (with your survey name and the web URL of the survey) appears at the bottom automatically.
• If you compose text for an email alert, you can use the [R] or [RnoNav] tags. For additional details, see the Email Body Text section of this manual.

9. The Plain Text option is used to switch the email to plain text and remove all HTML formatting. This is commonly used when recipients’ email system blocks suspicious emails with unknown links or HTML formatted emails.

10. You can set up the email priority by selecting the ‘Normal’ or the ‘High’ option, thus the email will be flagged as urgent.

11. Select the Request read receipts option to request read receipts from recipients that have opened the sent emails. This allows you to determine how many recipients opened your emails.

12. Click Spell Check to check the spelling of the entered text.

13. When you are done with composing the email click the Test Email button to see how it looks after delivering. Input email address to send test email to and click Send Test Email.

NOTE: You will receive a test survey link; submitting that link will not affect your real results.

14. Click Save to save your email settings.

WEB: www.worldapp.com   •   www.form.com
US: +1(781) 849 8118
US TOLL FREE: +1(888) 708 8118
UK: +44(0)-8451-303345
AU: +1(800)-554-985
FR: +33 (0)1-789-005-45
SG: +65-673-318-35

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Feb 2014 – V8.4
Manually Selecting Email Addresses

Use this method to create an email distribution list for your survey, by manually typing a list of email recipients.

1. To email your survey, click the Go button next to E-mail survey distribution from the survey Launch page.

2. Click the Edit Email to compose your invitation email. For more information, see the Compose Email subsection of this manual (Step 1).
3. Select the **E-mail survey to addresses I enter manually** option (Step 2).

4. In the **Enter the email addresses below** text field (Step 3), enter all the email addresses the survey will be sent to. Be sure to separate each address with a comma, semi-colon or a line break.

**NOTE:** Each respondent in your list should have an individual email address. Do not send your survey to a distribution list (group list) from your mail system. This may result in overwritten responses. For more information, see the **Email Addresses Input** sub-section of this manual.

5. Click the **Verify Email Addresses** button (Step 4) to see if there are any invalid email addresses in the list you supplied. If the syntax of an address is correct, it is displayed as 'Valid'; if there is a syntax error, the address will be displayed as 'Invalid'. You can also check whether the domain name indicated in the email exists. Click the **Check Domain Names** button for that. If invalid email addresses have been detected click the **Delete Invalid Addresses** button to delete them from the list.

6. You can track your respondents or make their answers anonymous:
   - Select the **Capture respondent email address** option to be able to view the list of email addresses of the respondents who took your survey.
   - If you select the **All respondents to remain anonymous** option, you will not be able to track the email addresses of the respondents, unless there is any unique identifier or a question asking about respondents personal details.

7. Click the **Send Email** button to email your survey invitation, including a link to this survey to the email addresses you entered.

8. Click **Back** to return to the previous page.

**Additional Notes:**

- If you send an email to a respondent and they submitted a complete survey, you can send the same email to the same email address again. This feature is useful if you need to survey the same respondents from time to time. Keep in mind that you should select **Allow multiple responses from the same computer** rule in this case. Every time respondents receive emails, unique links are generated and new records are created in the report.
- If you send an email to a respondent and they did not submit a survey, the respondent can only receive email through the Email Reminder or after the respondent's email address is removed from the list of Incompletes.
- You will not receive mailing statistics if no email was sent due to the reason mentioned above.
- If the **Do not allow respondent back into survey** or **Respondent may return and modify their response** rules have been set, and you add more addresses to the address list and trigger another launch, the survey goes only to those additional addresses.
- If the **Allow multiple responses** rule has been set, and you add more addresses to the addresses list and trigger another launch, the survey goes to all the new addresses and to all the respondents who have already completed the survey in the first launch.
Distributing to an Email List

This feature allows you to email your survey to list of addresses you import from data sources. You can also pre-populate different fields into the survey.

1. Click **Edit Email** to compose your email. For additional information, see the **Compose Email** section of this manual.

2. Select the **Import e-mail list for bulk survey distribution** option.

3. Click the **Format Data File** button to pre-populate some of your survey questions (import additional data on behalf of respondents along with their email addresses). For additional information, see the **AutoFill** section of this manual.

4. In order to email your survey to a list, you must import it as a comma delimited file (.CSV).

   **NOTE:** Each respondent in your list should have an individual email address. Do not send your survey to a distribution list (group list) from your mail system. This may result in overwritten responses. See also **Export E-mail Addresses from Data Sources** section.

5. Once you have created a file to import, click **Browse** to locate the file and double-click to select it.

6. Click the **Import Address File** button to import the email address file you have selected.

7. Click the **Verify Email Addresses** button (Step 4) to see if there are any invalid email addresses in the list you supplied. If the syntax of an address is correct, it is displayed as 'Valid'; if there is a syntax error, the address will be displayed as 'Invalid'. You can also check whether the domain name indicated in the email exists. Click the **Check Domain Names** button for that. If invalid email addresses have been detected click the **Delete Invalid Addresses** button to delete them from the list.
8. You can track your respondents or make their answers anonymous:
   • Select the 'Capture respondent email address' option to be able to view the list of email addresses of the respondents who took your survey.
   • If you select the 'All respondents to remain anonymous' option, you will not be able to track the email addresses of the respondents, unless there is any unique identifier or a question asking about respondents personal details.

9. Click the Send Email button to email your survey invitation, including a link to this survey to the email addresses you entered.

10. Click Back to return to the previous page.

Additional Notes:
   • If you send email to a respondent and they submitted a complete survey, you can send the same email to the same email address again. This feature is useful if you need to survey the same respondents from time to time. Keep in mind that you should select 'Allow multiple responses from the same computer' rule in this case. Every time respondents receive emails, unique links are generated and new records are created in the report.
   • If you send email to a respondent and they did not submit a survey, the respondent can only receive email through the Email Reminder or after the respondent's email address is removed from the list of Incompletes.
   • You will not receive mailing statistics if no email was sent due to the reason mentioned above.
   • If the 'Do not allow respondent back into survey' or 'Respondent may return and modify their response' rules have been set, and you add more addresses to the address list and trigger another launch, the survey goes only to those additional addresses.
   • If the 'Allow multiple responses' rule has been set, and you add more addresses to the addresses list and trigger another launch, the survey goes to all the new addresses and to all the respondents who have already completed the survey in the first launch.
Email to People from Contact Manager

This type of email survey distribution allows you to send email invitations to email addresses of your contacts from one of the Contact Managers.

1. Click **Edit Email** to compose the email invitation. For additional information, see the **Compose Email** sub-section of this manual.

2. Select the **Email survey to people from Contact Manager** option.

3. Choose the corresponding **Contact Manager** you wish to use.

4. Click the **Select a Group of Contacts** button to add contacts to your distribution list. For more details consult the **Contacts Groups** sub-section within the **Contact Manager** section of this manual.

5. After list of contacts is defined, click the **Setup Data Flow** button to set the data flow direction. You can update existing accounts with the new data submitted to the survey, create new contacts or use both at a time.

6. You can track your respondents or make their answers anonymous:
   - Select the **Capture respondent email address** option to be able to view the list of email addresses of the respondents who took your survey.
   - If you select the **All respondents to remain anonymous** option, you will not be able to track the email addresses of the respondents, unless there is any unique identifier or a question asking about respondents personal details.
7. Click the **Send/Schedule Email** button to email the survey right away or schedule launch for the future date.
Email Address Verification

Validate email addresses, both typed-in and imported from a file, before attempting distribution. This feature is available for all email distribution methods and it checks the syntax and the existence of domain names contained in the email addresses.

1. Click the **Verify Email Addresses** button to see if there are any invalid email addresses in the list you have just typed in or imported.

   ![Verify Email Addresses]

   **Valid Email Addresses**
   - support@worldapp.com

   **Invalid Email Addresses**
   - invalid domain name
   - email@nonexistingdomain.com

2. Click the **Check Domain Names** button to check if the emails’ domains are correct. When validated for the first time, a certain email address with non-existent domain name will be moved to the 'Invalid' column and highlighted with red color. If a certain email address with non-existent domain name has already been validated, it will be displayed as 'Invalid' at first verification and will not appear in invalid list untill clicking the **Check Domain Names** button.

3. If there any incorrect emails in the list click the **Delete Invalid Addresses** to remove them from the distribution list.

   ![Check Domain Names]

   **Domain names verification has been completed. 1 incorrect email address was found.**
Advanced Launch Features

- Survey Distribution Statistics
- Password Protection for your Survey
- Linking to your Survey from an Existing Website
- Pop-up Surveys
- iFrame Code to Display Survey in Frame on a Web Page
- Web Poll Code
- Upload Responses
- Adding a Suffix to the Survey Link URL
- IP Filtering
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- Bounced Email Management
- List of Bounced E-mail Messages
- Sending out Email Reminders
- Email Address Input
- Exporting Email Addresses
- Using Special Tags to Design your Email Body Text
- Using AutoFill
- Allowing Multiple Survey Responses from the Same Email Address
Survey Distribution Statistics

After you emailed the survey to respondents, you should receive email notification to the email address associated with your account. You can also access this statistics from the Manage Responses page by clicking the View Details button. You will learn more about Manage Responses option in the future chapters.

1. Once you receive the survey launch confirmation email, click the Please click here to view the statistics link to view your survey distribution statistics.

2. Select a time period (Step 1) to view the statistics for using the Start Date and End Date options. You can also select particular distribution campaign from the Date Emailed dropdown box. On the Email Details chart you will see number of emails versus particular date or time of the day when the survey was launched.

3. Select the category (Step 3) to view statistics for within the chart. Different categories are highlighted with different colors for better visualization and data appearance.

4. Click the Show Emails link next to the category to view distribution details per each category.
The **Email** column contains the list of emails within the selected distribution campaign and can be sorted by email address or domain name. The **Status** column lists statuses per each email address and may contain the following items:

- Has been sent
- Resent -- An email has been sent earlier
- An email has been sent earlier
- Recipient blocked
- The ‘From’ field is incorrect
- The domain name is incorrect
- SMTP error
- Sent
- Is being sent...
- Is being resent...
- Java transport rejecting
- SMTP not available
- SMTP: Mailbox unavailable (mailbox busy)
- SMTP: Local error in processing
- SMTP: Insufficient system storage
- SMTP: Syntax error, command unrecognized
- SMTP: Syntax error in parameters or arguments
- SMTP: Command not implemented
- SMTP: Bad sequence of commands
- SMTP: Command parameter not implemented
- SMTP: Mailbox unavailable (not found, no access)
- SMTP: User not local
- SMTP: Exceeded storage allocation
- SMTP: Mailbox name not allowed (syntax incorrect)
- SMTP: Transaction failed
- Unexpected (“+st+”) (It means unexpected error from SMTP, instead of “+st+” the reason will be written)
Password Protection for your Survey

Using this option, you can combine two distribution methods (for one launch) and secure your survey with individual passwords. Each respondent receives an email invitation with a unique link to your survey. Respondents who do not have email access navigate to the Master Link (URL) and use a secure password to access the survey.

Passwords can be set in two ways:

- Upload passwords from file – you can upload passwords and other data to pre-populate the survey using the CSV (comma separated values) data file.
- Apply passwords for contacts from one of the Contact Managers – passwords and other data flows to the survey from the Contact Manager records. Respondents can access survey via Master URL by providing their passwords.

To AutoFill your survey with individual passwords, you first need to create a question in the survey asking for a password and then create .CSV (comma separated values) data file containing passwords and any other data you want to import into the survey (if desired). If you pre-populate additional data along with the passwords and do not want that data to be displayed to respondents, hide that question. Only the question asking for a password will be shown to respondents when they open the survey. Hidden data can be seen from your side only in the Report section of your account.

1. Click the Go button next to ‘Password survey protection’ option on the survey Launch section.
2. Select the **Upload from file** option.

3. Select the Accessible Survey Questions for which you are going to import passwords and other data if any (AutoFill) and click the **Add** button.

4. Click the **Set Format** button to accept selected format.

5. From the table below select one of the survey fields to specify the field you want to use as a password. In the example picture this is the ‘Password’ field within the **Single-Line** question type created for holding passwords and personal data.

6. Select the **Overwrite** option if you want to allow respondents to edit prepopulated data. If this option is not selected, respondents can see AutoFilled data, but cannot edit it (this only concerns questions that are not hidden).

   **NOTE:** If the question you pre-populate is hidden and you select this option, the **Hide** option is deactivated and the question becomes visible to survey respondents. To hide it again, go to the **Edit Survey** page and activate the **Hide** option again.

7. Click **Browse** to select the data file you want to import.

8. Click **Import Data File** to import the file you have selected.

9. Click **Activate Password** to make your survey ready for voting. Respondents can now use uploaded passwords to submit surveys via the Master Link.

10. Click **Back** to return to the Launch section.
After the survey has been distributed via your e-mail system:

- On your Home Page, the total number of respondents who have not taken your survey, is shown in the Survey Information pane in the right and is indicated as Not Started.
- All respondents are listed on the Manage Responses page. For those respondents who do not have email addresses, the password will be displayed instead of the email address in the Not Started list.
- You can sort through and search for records on the password field, in the same way as you would in the email address field.

When taking a survey:

- If a respondent uses the Master URL and enters the correct password, the survey will open with prepopulated data.
- If a respondent uses the Master URL and enters a wrong password, a confirmation message pops-up, asking them to enter another password. If Cancel is clicked, a blank survey copy opens, which can also be submitted.
- If a rule different from the ‘Allow multiple responses from the same computer’ is set, respondents will not be able to proceed if they provide an incorrect password.

NOTE: If you delete any entries from the Not Started list, the respondents’ records will be permanently removed from the database.
Distributing the Survey through the Contact Manager

If you use Contact Manager contacts for survey distribution and publishing, you can protect the survey with passwords imported from Contact Manager records and import any other additional data.

1. Click the Go button next to Password survey protection option on the survey Launch section.

2. Use the Select from Contact Manager option.

3. Choose the Contact Manager you wish to use from the drop down.
4. Click the **Select a Group of Contacts** button.
   - The **Create new group from scratch** option allows you to filter contact list manually and upload selected contacts.
   - The **Select existing group** option should be used to create predefined group of contacts. Consult the **Contact Groups** sub-section for additional details.

5. **Setup Data Flow** defines data flow between the survey questions and Contact Manager records. This option is used to pre-populate Contact Manager data to the survey questions.

6. Select the field from the Contact Manager that will be used as the survey password. You can select custom field like Contact Name, Phone Number or system fields like Score, Status, Last Activity and others, but it is recommended to create separate field in the Contact manager for storing passwords to avoid any data mess or confusion.

7. Click the **Activate Passwords** button to enable password protection for the survey.

8. Give out the **Master URL** to survey respondents. Only those who provide the correct password will be able to access and submit it.
Linking to your Survey from an Existing Website

You can place a link to the survey on your web site so site visitors can participate in it.

1. Click the Go button next to ‘HTML code’ option on the survey Launch section, to provide your Webmaster with HTML code.

   ![HTML code selection](image)

2. Select the ‘HTML code for survey link’ option (Step 1).

   ![HTML code example](image)

3. Under the second step you will find several examples of HTML code that your Webmaster can place on your company’s website to link to your survey.

4. Click Back to return to the survey Launch section.
Pop-up Surveys

Display your survey in a pop-up window for each visitor or for every certain numbered visitor to your website. This feature can monitor IP addresses of voters, consequently controlling duplicate responses.

1. Click the Go button next to 'HTML code' option on the survey Launch section.

   Select survey distribution method
   - HTML code for survey link
   - Pop-Up survey code
   - iFrame code to display survey in frame on page
   - Web Poll code to embed survey within page

2. Pop-up survey for every 5th visit

3. Copy and paste the HTML below into your web page body

   ```html
   <!-- Start POP-UP (Powered by KeySurvey) -->
   <form name='fsName' action='http://www.keysurvey.com/f/444198/1257/?Popup=1'
   enctype='multipart/form-data'
   method='POST'>
   <input type='hidden' name='Popup' value='1'/>
   </form>
   <script type='text/javascript'>
   var rnd = Math.random();
   var max = 25;
   var enableip = "",
   var disableip = "";
   if (rnd * max < 1) {
       document.write("<sc" + "rpt")
   }
   document.write("language='javascript'" + "rpt' type='text/javascript'" + "rpt")
   document.write("src='http://www.keysurvey.com/Member/Public/popup_enable.jsp?"
   ```

2. Select the Pop-Up survey code option (Step 1).

3. You can control the pop-up process and enter a number of site visitor to generate the pop-up survey. Set this option and click the Apply button.

4. Under the third step you will find the JavaScript code for the pop-up survey that your Webmaster can place on your company’s website to link to your survey. For additional information on visitors filtering see the IP Filtering section of this manual.

5. Click Back to return to the survey Launch section.

Additional Notes:

- If a respondent attempts to take a pop-up survey a second time (if the survey has been submitted before) and the rule 'Do not allow respondent back into survey' has been set, the pop-up survey will be automatically closed.
- If respondents enter the page again, this survey may pop-up in two cases:
  - Their cookies are disabled.
  - There is a cookies buffer overflow.
  - If the cookies are disabled, respondents should enable them.
  - If there is the cookies buffer overflow, respondents should delete all the cookies.
• To delete all the cookies in Microsoft Internet Explorer 8.x:
  1. Select ‘Delete Browsing History’ from the Tools menu.
  2. Select private data you need to delete (cookies, history, passwords, etc) and click the Delete button.

• To block the cookies in Microsoft Internet Explorer 8.x and higher:
  1. Select ‘Internet Options’ from the Tools menu.
  2. Click the Privacy tab.
  3. Click the Advanced button.
  4. Select the ‘Override automatic cookie handling’ option.
  5. Click the Block option in the ‘Third-Party Cookies’ column.
iFrame Survey Code (For displaying your survey in frame on the page)

Display your entire survey on any page of your website.

1. Click the Go button next to ‘HTML code’ option on the survey Launch section.
2. Select the **iFrame code** option (Step 1).

3. The code text box contains HTML survey code your Webmaster can insert in the body of an HTML page on your company's website.

4. Click Back to return to the survey Launch section.

**Additional Notes:**

- Your survey must not contain more than one page.
- Please do not apply any logic transitions to your survey.
**WebPoll Code**

Embed the survey of the specific width into your page.

1. Click the **Go** button next to ‘HTML code’ option on the survey **Launch** section.

2. Select the **Web Poll code to embed survey within page** option (Step 1).

3. Use the ‘**Width**’ field to set the width of the survey, then click the **Apply** button to save your settings.

4. Click **Test** to test how your survey works.

5. Copy and paste the HTML code of the survey into your web site. The HTML script should be inserted within `<body></body>` tags.

**Additional Notes:**

- Your survey must not contain more than one page.
- When respondents take your survey, cookies are kept. This ensures that your survey is taken only once from the same computer.
Upload Responses

Use this feature to upload responses to the survey Report from a data file. This is commonly used to make data entry quick when adding the responses of those who took paper surveys to the results of those who took electronic surveys.

To use this feature, you need to first design your survey and create a CSV (‘comma separated values’) Data File (corresponding to your survey). Moreover, this feature allows sending emails to respondents with the unique survey links that will contain uploaded data.

1. Click the Go button next to the Upload responses option, on the survey Launch section.

2. Select the Send email to respondent option (Step 1), if your CSV data file contains email addresses and you wish to send emails to respondents.
3. Specify the column number (Step 2) of the ‘email address’ field in the CSV file (if it exists).

NOTES:

• Sending emails is not mandatory, so you can skip these steps and continue with responses uploading if you do not want to send emails.

• If you decide to send emails to respondents upon responses upload, you can compose Email Invitation on the Launch -> Email Survey Distribution -> Edit Email page.

4. Click Browse to locate and select the CSV file data.

5. Click Import to upload the respondent data into your survey.

6. Click Back to return to the survey Launch section.

Data File Format Notes:

• Only commas, semicolons and tabs can serve as delimiters.

• If you use one of the above delimiters in a text field, enclose it in double quotes.

  For example: “1 part, 2 part”;3 part.

  To use double quotes in a text field you should double them up.

  For example, “””1 part, 2 part””” – would appear as “1 part, 2 part”.

• Responses to Pick one or ‘other’ and Dropdown box questions are indicated in one field (answer number or answer text).

  NOTE: If your answer choices contain numeric text, you should specify the text of the selected answer but not its order number. The selected ‘other’ answer choice is indicated as a text field and the unselected choice as an empty field.

• Responses to the Check All and List Box questions are specified as 0 or 1 (0 - unselected answer, 1 - selected answer) according to the quantity of the answer choices.

  The selected ‘other’ answer choice is indicated as a text field and the unselected one as an empty field.

• Responses to the Rate Different Items Along the Scale of Your Choice question are specified as figures (from 1 to 12, and 0 if no radio button was selected to an answer) corresponding to the number of scale columns, starting from the first answer to the last one in order top-down.

• Responses to the Single Line Text with Pre-Format Option and Multi Line Text Response are specified as text answers (one field for each text answer).

• Responses to the Numeric Allocation are specified as numeric values (one field for each numeric value, and additional field for total). If one of the fields should be empty, import 0 instead of the blank field. The total field is always updated with the sum of the values of other fields.
Let us take a look at the example of using this feature:

### Annual Review Employee Survey

#### Employee details

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>William Morrell</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Email</td>
<td><a href="mailto:william.morrell@worldapp.com">william.morrell@worldapp.com</a></td>
</tr>
<tr>
<td>Employee ID</td>
<td>33245</td>
</tr>
<tr>
<td>Job Title</td>
<td>SE</td>
</tr>
<tr>
<td>Date</td>
<td>01/10/2012</td>
</tr>
<tr>
<td>Department</td>
<td>SE</td>
</tr>
<tr>
<td>Manager</td>
<td>MC</td>
</tr>
</tbody>
</table>

#### Review Period:

- From: 12/10/2012
- To: 02/10/2012

#### Communication

- Management does a good job communicating about changes or decisions that affect employees
- I am able to contact Senior Management when needed
- I have enough information to do my job well
- Managers communicate a clear sense of direction for my organization

Uploaded CSV data file should look as follows:
William Morrell;william.morrell@worldapp.com;33245;SE;01/10/2012;SE;MC;12/10/2012;02/10/2012;3

**Tip: Changing Submit Date using the Upload Responses feature.**

There is a way to change 'Submit Date' in 'View by Respondent' mode using the 'Upload responses' feature along with special HTML tag. To do that you should do the following:

- Create a new question in the survey of 'Single Line' or 'Multi line' type asking about the date of submit.
- Input `<submit_time format="yyyy-MM-dd hh:mm"/>` tag into answer option field and save your question.
- Create the CSV Data File in accordance with the survey and upload responses.

Thus, the 'Submit date' at the top of the 'View by Respondent' page will be changed to the date indicated in the CSV.
• You can set the date format in the way you want (e.g dd-MM-yyyy, yyyy-MM-dd, yyyy/MM/dd, yyyy-MM-dd hh:mm etc).
• Please pay attention that MM is for months and mm is for minutes.
• Make sure that the date format in the CSV file is the same as in the HTML tag you put.

Additional Notes:

• If your CSV file for a dependent survey (Student survey) contains profile codes that do not match the profile codes of the corresponding profile survey, (Teacher survey) you will not be able to import these records.
• If there are no profile codes in your CSV file for a profile survey (Teacher survey) or the column number has not been indicated, new profile codes will be generated and this data file will be imported.
• Use the [Fxxx] tag to insert additional information in your email body text or subject, from the import field of your Data File (where xxx is the field number starting from ‘1’). In the example above [F1] refers to William Morrell.

**NOTE:** You should refer to the fields containing text but not numbers.

• Use the [ProfileCode] tag to insert a profile code value in your email body text or subject from the import field of your Data File.
Adding a Suffix to the Survey Link URL

This advanced feature allows you to add a suffix to your survey link. Use this feature to protect your surveys against unauthorized access.

When adding a suffix to your survey link you should keep in mind the following:

- There should be software on your local server that will convert your suffix into a URL encoded line and add it to the survey link.
- The URL suffix works instead of cookies.
- The survey takers are identified by the suffixes within your network. A suffix is added to the link automatically, a respondent does not know it.
- Suffixes are shown in survey reports by respondent.
- You can only use your Master URL with a suffix.
- This feature is an effective protection method against unauthorized access to your surveys.
- The respondents cannot take the survey via the Master URL if they do not have a valid suffix.
- When you take a survey via the Master URL, removing the suffix from the URL creates an alert that says: "Page not found".

**IP Filtering**

This feature allows you to control the survey pop-up processes. Use this feature to set the values for variables `var enableip` and `var disableip` in HTML code. These variables have no value by default.

Using this feature you can do the following:

1. **Enable pop-ups to one particular IP address only:**
   - Set the value of `var enableip` equal to the desired IP address (e.g. `var enableip='127.15.15.1'`).

2. **Enable pop-ups to a group of IP addresses:**
   - When you set the value of `var enableip`, put 0 (zero) instead one or more bytes of IP address to make it a group.
   - **For example:** Use `var enableip='127.15.15.0'` and the survey will pop-up for visitors from IP addresses beginning with 127.15.15.x: 127.15.15.1, 127.15.15.2, etc.
   - Use `var enableip='127.15.0.0'` and the survey will pop-up for visitors from all IP addresses beginning with 127.15.x.x etc.).

3. **Disable pop-ups to one particular IP address:**
   - Set the value of `var disableip` equal to the desired IP address (e.g. `var disableip='127.15.15.1'` – the survey will not pop-up for visitors from IP address 127.15.15.1).

4. **Disable pop-ups to a group of IP addresses:**
   - When you set the value of `var disableip`, put 0 (zero) instead one or more bytes of IP address to make it a group.

Keep in mind that:

- IP address consists of 4 (four) bytes (IP address format is X.X.X.X). Each byte can possess the value from 0 to 255.
- If you set the byte value as 0 (zero), it means that you choose not a single IP address but a group of them.
- If an IP address is indicated as a value of both variables `var enableip` and `var disableip`, it will be treated as DISABLED.
- If you do not want to control the survey process by enabling/disabling certain IP addresses, set the default values of the variables as: `var enableip='''` and `var disableip='''`. 
Manage Responses

If you distributed your survey via email or password protection method you would be able to review the survey completion statistics and manage respondents. See a list of all respondents who completed the survey and when, as well as respondents who did not complete the survey.

1. Click Manage Responses from the survey Information Pane on the Home Page.

2. View the survey completion statistics in the Summary area (Step 1).

   1. Summary
     2. - Via Email / Password
        1 - not started
        0 - in progress
        1 - completed
     2. - Via Master URL
        0 - in progress
        2 - completed

   Manage respondents

      Email and Password
      Not started

      Order by: Sending order
      Search
      Go

      Delete:
      Email address/Password
      Sent on
      Completed on

      support@worldapp.com
      Sep 5, 2012
      Not started

      Total received: 1
      Completed: 0

      Select all
      Unselect all
      Delete selected
      Delete all incompletes

      Download Status Report
3. There are two columns containing information on surveys that have been distributed via our mail system, and those that have been distributed externally. They are:
   - **Via Email/Password** – Shows number of not started, in progress, completed
   - **Via Master URL** – Shows number of in progress and completed

4. Click the **View Details** button to view the statistics of your survey distribution that was made via Email Distribution method. Consult the **Survey Distribution Statistics** sub-section for detailed information.

5. Click the **Manage Bounces** button to see if there any undelivered emails and their status.

6. Use the Manage Respondents option (Step 2) to filter the list of survey respondents by the distribution method (Email and Password, Email Only, Password Only) and status (All, Completed, Completed and In Progress, Not Started). You can also sort list of respondents and search for specific ones.

   **NOTE:** 'In Progress' responses to surveys (that have not been distributed via our mail system), can be saved and included in a report if the 'Do not allow respondent back into survey' or 'Respondent may return and modify their response' rules have been set on the survey **Settings** page. If taking the survey via the Master URL, cookies are used to identify the respondents.

7. The email results are displayed with the following columns:
   - **Delete** – select records you want to delete from the list.
   - **Email address/Password** – This column displays the email addresses of the respondents who took your survey.
   - **Sent on** – This column displays the date you sent the email to the corresponding address.
   - **Completed on** – This column displays the date the respondent submitted the survey. Click on the date to view the report by the respondent.

8. Click the **Select All** button to select all the addresses.

9. Click the **Unselect All** button to unselect all the selections.

10. Click the **Delete Selected** button, to delete those emails selected.
    **NOTE:** This means you will not be able to send a reminder to these addresses.

11. Click the **Delete All Incompletes** button, to delete all addresses of respondents who did not complete the survey. Thus you can resend the survey to those addresses again if email reminder does not meet your needs.

12. Click the **Download Status Report** to export your distribution statistics to the Excel spreadsheet.

13. Click **Back** to go to the **Home Page**.

**Additional Notes:**

- When you delete email addresses from the **Incompletes** list (Not Started and In Progress), your respondents can still take your survey using the link you initially emailed to them.

- If you delete an address from the **Incompletes** list, you will be able to resend the survey to this address. The information on the respondent is not removed from the database, only the email address is deleted from the list. The launch date will be the date of the first survey distribution.
Bounced Email Management

This feature is commonly used for email campaigns with long list of emails sent at once if there is no way to check each email one by one before the launch. You can view and manage bounced messages after your email distribution is complete. A bounce message is an automated electronic mail message from a mail system informing the sender of another message about a delivery problem. The original message is said to have bounced. Using this page you can detect the type of bounced messages, export them to a CSV or Excel file or remove them from the distribution list.

1. To view and analyze bounced e-mail messages, click the Manage Bounces button on the Manage Responses page.

2. Choose one of the surveys you have distributed before from the Select Survey drop-down box. Surveys are sorted by folders as they appear on the Home Page. After that click the Go button next to the drop-down box.

3. Select the bounce category you want to operate with. Our mailing system recognizes the following types of bounced messages:
   - Unknown email domain - The messages were not delivered because the domain name is unknown. Check your spelling.
   - Non existent address - You’ve tried to send an e-mail to an unknown user on the domain. Check your spelling. It’s possible the account has been deleted.
   - Mailbox Full - The user’s mailbox is over its storage limit.
   - Vacation / Auto reply - The automatic e-mail replies to your messages set with the help of auto reply rules.
   - Blocked - The recipient’s mail server blocked the message sent from your IP address or from your mail server’s IP address.
   - Other - All other reasons why the e-mail messages were not delivered to the user.
4. Click the **Show List** button to display the list of bounced e-mail addresses for the selected survey if any. The list will include the e-mail addresses from all categories selected on this page. For details, see the **List of Bounced E-mail Messages** sub-section below.

5. You can export list of the bounced messages into a CSV or an Excel file.

6. Click **Back** to go back to the previous page.

**List of Bounced E-mail Messages**

On this page you can clean up your address list of bounced e-mail messages or export it to a CSV or Excel file. This feature is useful if you send bulk e-mail and deal with great number of bounced messages. Some popular mail servers may block all mail from you if you repeatedly send mail to a bad address on their domain, that’s why it is recommended you remove all addresses that got bounced from the mailing list.

1. Select one or more categories and click the **Show List** button from the **Manage Responses > Manage Bounces** page.

2. Select the category you want to operate with by using the Category drop-down box and click Go next to it. The available categories are the following:
   - **All** – The bounced messages from all categories will be listed on page.
   - **Unknown email domain** – The messages were not delivered because the domain name is unknown. Check your spelling.
   - **Non existent address** – You’ve tried to send an e-mail to an unknown user on the domain. Check your spelling. It’s possible the account has been deleted.
   - **Mailbox Full** – The user’s mailbox is over its storage limit.
   - **Vacation / Auto Reply** – The automatic e-mail replies to your messages set with the help of auto reply rules.
   - **Blocked** – The recipient’s mail server blocked the message sent from your IP address or from your mail server’s IP address.
   - **Other** – All other reasons why the e-mail messages were not delivered to the user.
Sending out Email Reminders

Create and send email reminders to recipients who have not completed the survey – immediately, on specified dates and times or on a specified number of days after the survey launch. You can customize as many reminders as you need, each having its own subject line, body text and ‘From’ field and send them on the indicated date.

1. To schedule an email reminder select the survey from the Surveys Home page and click Schedule Reminder link from the Survey Information pane in the right.
   NOTE: This option is available if your survey has Incomplete responses (Not Started, In Progress).

2. Compose your email reminder text. For more information consult the Compose Email chapter of this manual.
3. Click the **Next** button to proceed to the reminder options.

![Email Reminder](image)

**Email Reminder**

**Schedule Reminder**
- Email reminder today (will be sent within 1 hour)
- Email reminder to non-respondents 7 days after first invitation
- Email reminder on [date]

Please enter a list of emails which you want to include to mailing
- Send to all unsubmitted respondents (Not started and in progress)
- Send to all not started respondents
- Send to all respondents in progress
- Edit address list manually

4. Schedule an email reminder:
   - Select 'Email reminder today' to email reminders within an hour.
   - Select the 'Email reminder to non-respondents N days after first invitation' option to email the reminder on the "Nth" day after the survey email invitation was sent to a respondent. This is relative reminder.
     **For example**: You launch the survey on April 1 with a reminder set to go out after 10 days. Respondents who have not submitted the survey by April 11, will receive the reminder email.
   - Select 'Email 1st reminder on' to email a reminder on a specific date in the future.

5. Select list of emails you want to send reminders to:
   - 'Send to all unsubmitted respondents' – reminder will be sent to all email addresses listed in the incompletes (Not Started and In Progress).
   - 'Send to all Not Started respondents' – only respondents who did not open and start their surveys will be notified.
   - 'Send to all respondents In Progress' – only respondents who have already started but still have not completed their surveys will be notified.
   - 'Edit address list manually' – allows you to edit the list of respondents who will receive email reminders manually. By default it contains all 'Not Started' and 'In Progress' respondents.

6. Click **Finish** to activate Email Reminder.

**Additional Notes:**
- You can schedule as many reminders as you need, but only one reminder campaign will be sent per one day. To set up one more reminder follow steps described above.
- To deactivate email reminder and cancel its distribution, click the delete icon next to appropriate reminder in the **Survey Information** pane on the **Home** page.
Managing Email Reminders

When at least one reminder is scheduled, **Manage reminders** section becomes available for your survey. You can edit, copy and delete scheduled reminders from this section.

1. To open the **Manage reminders** section select the survey from the **Surveys Home** page and click **Manage reminders** link from the **Survey Information** pane in the right.
*NOTE:* This option is available if your survey has at least one reminder scheduled.

2. Create a **New Reminder**, **Edit**, **Copy** or **Delete** already scheduled reminders from here.

3. Proceed to the reminder options.

Click **Close** to exit this section.
Email Addresses Input

You can manually type in email addresses of respondents one at a time. Be sure to separate each address with a comma or semicolon. You can also enter several addresses at a time by copying and pasting email addresses from any address file or database. Again, be sure all addresses are separated by a comma or semicolon.

You can use respondents’ names along with their email addresses. These names can be used in the body text and will be displayed in the 'To' field of your survey email. To use names along with the email addresses you should use one of the following templates:

- [Name]email@domain.com
- Name<email@domain.com>

Make sure that:

- There are no spaces or other symbols between [Name] and email address.
- The email address is not enclosed in any symbols other than <>.
- There is a delimiter between addresses:
  [Name]email@domain1, Name<email@domain2>....Addresses separated with spaces are interpreted as invalid.

IMPORTANT! If you want your survey to be distributed correctly, make sure that there are no extra symbols added to the email addresses.

Exporting Email Address

Use this method to create an email distribution list for your survey, by importing an existing text file of email addresses.

Most applications (including Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access and FileMaker) allow you to export data into a comma delimited text file (.csv).

Exporting from Outlook Express

Outlook Express allows you to export data in a CSV (comma separated values) format, which can then be imported into your Key Survey address book.

1. Launch Outlook Express and select File | Export....
2. Choose Comma Separated Values and click Export.
3. Choose a file name for the exported data and click Next.
4. Select E-mail Address field (select other required fields if you are going to pre-populate them into your survey before distribution).
5. Click Finish.
Exporting from Microsoft Outlook

Microsoft Outlook allows you to export data in a CSV (comma separated values) format, which can then be imported.

1. Launch Microsoft Outlook and select File | Import and Export.
2. Choose Export to a file and click Next.
3. Choose Comma Separated Values (Windows or DOS).
4. Select folder to export from and click Next.
5. Save exported file and click Next.
6. Click Map Custom Fields to select the necessary fields for the exported file.
7. Click Finish.

Exporting from Other Data Sources

You can import data into Key Survey from any other application that can create a CSV (comma separated values) file.

Make sure:

• The file contains an Email field. Your survey is to the email addresses indicated in this file field.
• The file does not contain fields you do not want to import to your survey, including field headings (such as ‘Email’, ‘Name’ etc.), page breaks, etc.
• Only commas, semicolons and tabulations serve as delimiters/list separators. If your file contains other separators you may need to change Regional Settings on your computer.

Additional Notes:

• For more information on bulk survey distribution, see the Email Survey To List section of this manual.
• For instructions on how to pre-populate fields in your survey before distribution, see the AutoFill section of this manual.
Using Special Tags to Design your Email Body Text

You can use the following tags designing your email body text:

- [NAME]
- [S]
- [ST]
- [S_text]
- [ST_text]
- [URL]
- [URL_text]
- [R]
- [RnoNav]
- [REMOVE]
- [REMOVE:some text]
- [REMOVE_URL], [REMOVE_URL_text]
- [Fx]
- [CM:Field Name]

[NAME]

If you are using respondent’s name along with the email address (for manual or bulk email invitation distribution), you can insert the name into email body text.

Type [NAME] and the respondent’s name will appear in this position. If there is no name in the square brackets, the [NAME] tag will be replaced with the email address. For example, if the address is [John Smith]j.smith@domain.com, the [NAME] tag will be replaced with "John Smith".

NOTE: The [NAME] tag cannot be used in ‘Email Reminders’.

[S] and [ST]

You can place the link to your survey within your email body text. Type [S] or [ST] if you want to paste hyperlinked survey name or hyperlinked survey title accordingly.

[S_text] and [ST_text]

Type [S_text] or [ST_text] if you want to paste non-hyperlinked survey name or survey title accordingly.

[URL] and [URL_text]

You can also enter the [URL] or [URL_text] tags into the invitation or reminder body. It will be substituted by the hyperlinked or non-hyperlinked URL of the survey accordingly.

[R]

If you are composing a text for an email alert and want to include a link that lead to the response type [R] and the report link will appear in the email body.
[RPDF]
If you are composing a text for 'Email Alert', and you want to include the report by response PDF link use the [RPDF] token, it will be automatically substituted by the link in the email body.

[RnoNav]
If you are composing text for an email alert to respondents or to another person, and you do not want that person to navigate and see other responses, include a link to the report by respondent without navigation buttons using the [RnoNav] tag. This tag is replaced by a link to the report. The recipient of the Email Alert can view only this particular report.

NOTE: Some email programs do not allow following links by clicking them. To enable respondents to take the survey, we automatically add your survey URL to email body text. That way, your survey takers can just copy the link and paste it into the browser address line.

[REMOVE]
This tag is used to allow respondents removing their addresses from the mailing list. Thus they will not receive reminders and alerts for the current survey.

Use the [REMOVE] tag within your email body text. This tag is replaced with the following linked text: Remove from list.
NOTE: Respondents, whose emails addresses are removed from the survey email list, can still use links from the invitation email to take the survey.

[REMOVE:some text]
This tag is also used to allow respondents removing their addresses from the mailing list, but it will be replaced with the linked text on the recipient side.

[REMOVE_URL] and [REMOVE_URL_text]
This tag is used to allow respondents removing their addresses from the mailing list as well, but it will be replaced with the unsubscribing URL (linked and not linked respectively) on the recipient side.

[Fx]
If you pre-populated any survey questions using Autofill (Email Survey Distribution and Password Survey Protection with Autofill) feature or used the Address Book feature you can insert additional information on respondents in your email body text or survey footer.

Use the [Fx] tag, where x is the number of the imported field (column) of your Data File or Address Book. For example: If you import the respondent’s name in field (column) one, you can type "Dear [F1]" and tag will be replaced by respondent’s name like this "Dear William".

NOTE: The [Fx] tag cannot be used in ‘Email Reminders’, if the Address Book was used for the survey distribution.
[CM:Field Name]

Similarly to the \(Fx\) tag utilizing you can insert any contact's data from the Contact Manager to the email invitation, email reminder or email alert.

For Example: "Dear [CM: Name], as a part of the [CM:Department] team we are glad to..."
Using AutoFill

Use this feature along with the 'Email Survey to List' and 'Password Survey Protection' to pre-populate survey with answers on behalf of respondents or use this pre-populated data in hidden questions for your reference.

When creating the .CSV file:

• This file must contain the ‘Email’ field. Your survey will be sent to email addresses indicated in this file field.
• This file must not contain fields that you do not want to import to your survey, including field headings (such as ‘Email’, ‘Name’ etc.), page breaks, etc.
• Only commas, semicolons and tabulation can serve as delimiters/list separators. If your file contains other separators you may need to change Regional Settings on your computer.

When selecting questions to import:

• There should be a separate question for each field. The only exceptions are the Single Line Text Response, Check All That Apply and List Box question types. In this case, you can use a separate answer line for each field to be imported.
  For example: You can have just one question (Single Line) to import ‘demographic’ information (such as name, email address, age, etc.).
• Sometimes when you export information from external data sources, certain fields are automatically broken up into parts.
  For example: The ‘Name’ field is sometimes represented by two fields ‘Last Name’ and ‘First Name’. In this case, you need to import first and last name as responses to two different questions.
• The order of the questions and data file fields (columns) must be strict and correspond to each other.
• Only the following question types can be used: Single Line Text Response, Multi-line Text Response, Pick One with Other Option, Dropdown Box, Check All That Apply and List Box.
• To autofill Check All That Apply and List Box question types, specify the responses as 0 or 1 (0 - unselected answer, 1 – selected answer). The selected ‘Other’ answer choice should be indicated as a text field and unselected one as an empty field.
• If you use question type Dropdown Box, the answer choices must strictly correspond to the content of the field in Data File. For example, if you are going to import information on respondents’ gender and you set answer choices as ‘Male’ and ‘Female’, the ‘Gender’ field of your Data File should ONLY contain one of these two values.
• Keep in mind that you can only import one response per question, unless using the Single Line Text Response, Check All That Apply and List Box question types.
Distributing a Survey

To create CSV data file and upload it to the survey follow these steps:

1. Create .CSV (comma separated values) Data File containing the information you want to import. You can use Excel or even simple editor as Notepad. Make sure to use the Save as option and select CSV.

2. Click the Format Data File button on the Email to List page, to pre-populate some of your survey questions.

3. Specify the format of the data file to be imported. Select the questions you want to pre-populate and use the right arrow button to move them from the ‘Accessible Survey Questions’ field into the ‘Autofill These Questions’ field.
4. Indicate the number of Email and Password (if any) fields (columns) in the ‘Enter field number for email address’ and ‘password’ boxes. In the example data file emails reside in the third column right after the First and Last name fields.

5. Click Save to confirm that you want to import responses to the questions listed. A table representing the format of your data file is automatically created.

6. Select the 'Overwrite' option, if you want to allow respondents to edit prepopulated data. If this check box is unselected, your respondents will see pre-populated data, but will not be able to edit it (it concerns only questions that are not hidden). Make sure the columns of this table strictly correspond to fields of the data file.

7. Click Back to return to the Email Survey To List page. Now you can import your data file.
Allowing Multiple Survey Responses from the Same Email Address

As Key Survey generates unique survey links, respondents can not use the same link to submit several responses. Use this feature to allow respondents to take the same survey (distributed via our email system) several times. You can distinguish survey results using a unique code and other attributes, (from the file for AutoFilling).

1. Create .CSV (comma separated values) Data File containing information you want to import. This file must also contain unique identifiers. (111, 222 and 333 in the example below)

```
111,Josh,Carson,josh.carson@worldapp.com,Male,1,0,0,0
222,Josh,Carson,josh.carson@worldapp.com,Male,0,1,0,0
333,Josh,Carson,josh.carson@worldapp.com,Male,1,1,1,1
```

2. Click the **Format Data File** button on the *Email to List* page, to pre-populate some of your survey questions.
3. Specify the format of the data file to be imported. Select the questions you want to pre-populate and use the right arrow button to move them from the ‘Accessible Survey Questions’ field into the ‘Autofill These Questions’ field.

![Accessible Survey Questions](image1)

![Autofill These Questions](image2)

4. Select the **Allow duplicate email addresses** option.

5. Enter the field number for email address and the unique code.
   
   **NOTE:** You must use different unique codes in your data file.

6. Click **Save** to save the format settings.

7. Select the 'Overwrite' option, if you want to allow respondents to edit prepopulated data. If this check box is unselected, your respondents will see pre-populated data, but will not be able to edit it (it concerns only questions that are not hidden). Make sure the columns of this table strictly correspond to fields of the data file.

8. Click **Back** to return to the **Email Survey To List** page. Now you can import your data file.

9. Click **Back** to return to the **Email To List** page where you can upload the data file and send emails to respondents.
**Education Package**

Using this feature you can apply scores and set time limit for survey submission. That can be used to administer examination test for students.

**Creating an 'Examination' Survey**

1. Design new survey and insert questions in it.

2. Navigate to the last question in the survey (unless it is of *Section Header* type) and click the Logic button next to it. It is recommended to create dummy question at the end of the survey, hide it and then apply Branch on Range logic for last visible question.

3. Add points to the answer options. Keep in mind that you can only do this with multiple-choice questions (Pick one, Check all that apply, Dropdown box and List box). Apply scores in accordance with the answers accuracy. For additional details see the *Branch on range* section of this manual.

4. Save scores and go back to edit your survey.

5. Then use the *Time limit* option on the survey *Launch* page, to indicate the time limit (number of minutes for respondents to complete the questionnaire).
6. Click the **Save** button to save your input. Keep in mind that the minimum time limit is 5 minutes.

7. Launch your questionnaire.

When 5 minutes is left, an alert pops up:

**Your session will expire in 5 minutes at 11:50**

After the responses have been received, navigate to the *Reports Home* page and run the report to review the results.

The report includes the **Total Score**, which is automatically generated based on the total points scored by the respondent (summarized values on selected answers).

**NOTE:** In order to preview the total score the Score Calculator Plugin must be applied.
Launching the Survey through Salesforce.com

Key Survey and Salesforce.com integration brings a new time-saving way of customer management to our customers. Using the Salesforce.com integration, Key Survey provides the capability to pass information between your surveys and fields within your Salesforce.com account. This powerful integration will also allow you to distribute surveys using your existing Salesforce.com facilities.

Integrating with Key Survey ensures that your Salesforce.com database is always updated with your client’s information after they submit your survey. It is now simple to export data from Salesforce.com account into Key Survey without the need for manual data entry. Automate your sales process with bi-directional data exchange between Salesforce.com and Key Survey.

This section of the manual covers the following chapters:

- Setting Up the Login Page
- Configuring a New Integration Setup
- Viewing and Modifying the Current Integration Setups
- Synchronization Rules
Setting Up the Login Page

Access to your Salesforce.com account provides the interchange of data between Key Survey’s servers and Salesforce’s servers before and after the survey is completed. By providing your Salesforce.com login and password you will receive access to further operations:

1. On the Surveys Home page, click My Account.

2. Click Salesforce.com Settings from the My Account page.

3. Enter your Salesforce.com login information.

Please provide Salesforce.com login and password below

User Name
support@worldapp.com
example: jsmith@company.com

Password (followed by a security token) [?] 

case sensitive

Use SSL
Secure, but may slow down the connection and impact the respondent’s experience

Use Salesforce Sandbox

Update
4. **User Name** (Salesforce.com user name). The user name must be in the form of an email address;

5. **Password**, followed by a security token. The password is case sensitive and must be followed by a security token.

**NOTE:** A security token is an automatically-generated key that you must add to the end of your password to let your application log in to Salesforce.com. For example, if your password is mypassword, and your security token is XXXXXXXXXX, then you must enter mypasswordXXXXXXXX to log in. To receive or reset your security token at any time, while in your Salesforce.com account, click Setup > My Personal Information > Reset Security Token, and click the Reset Security Token button. The new security token is sent via email to the email address on your Salesforce.com user record.

6. Select the **Use SSL** option to provide a secure connection between Key Survey and Salesforce.com using Secure Sockets Layer protocol. Enabling the SSL connection may slow down the server performance (additional encryption/decryption operations) and may impact the respondent's experience. You should only use it when necessary.

7. Select **Use Salesforce Sandbox** to log in to your Salesforce sandbox and perform integration with a test environment.

8. Click **Update** to save the login information in the database.

**Salesforce Sandbox** is a test environment that can be created within your Salesforce account and is a copy of your organization for test purposes without affecting the data and applications in your Salesforce production organization.

To log into and perform integration with your Salesforce Sandbox:

- Input modified username into **User Name** text field in accordance with the sandbox you want to set up integration for, so the sandbox name is appended to the username. For example: To integrate your account "user@acme.com" with sandbox named "test" username should be modified as "user@acme.com.test".
- Select "Use Salesforce Sandbox" option.

**NOTE:**
- You may connect to your Salesforce.com account by taking advantage of our ‘Single Sign-On’ option. This option allows for validation of usernames and passwords through your local network - such as LDAP - without the need to enter multiple passwords.
- The Key Survey application as well as the LDAP server should be set up on your local network. Your respondents’ data will be stored on your or Key Survey’s server, while the account information will be stored on the LDAP server. The integration is possible only when the login data from your Key Survey account match the login data from the Salesforce.com account.
- Once the ‘Single Sign-On’ access is configured from Salesforce.com, the user will see the Use Salesforce.com Single Sign-On check box on the login page. Select it to authenticate once and gain access to your Salesforce.com resources. Each user is authenticated just once with their user-credentials during login. From then on, your authentication is managed directly between your Salesforce.com account and your LDAP database.
- You must be a member of an LDAP working group to use this service.
Distributing a Survey

Configuring a New Integration Setup

1. On the survey Launch section, click Go next to the Salesforce.com Integration.

   ![Diagram of Salesforce.com Integration configuration]

   - Select link type: Keysurvey URL, IP address, Customize URL.
   - Select the checkbox for secure communications.
   - Master Survey URL: You may copy and paste the URL below:
     ```
     http://www.keysurvey.com/f/585652/69e/
     ```
   - Start Survey: 2014-01-29, 6 AM EST
   - End Survey: 2014-03-01, 6 AM EST
   - End Survey: When the completed number equals no limit
   - Time limit: Close and submit after no limit minutes
   - Send expir alert: Edit Email

2. Click the Setup New Integration button.

3. Give your integration a unique name. The integration name is used only for internal purposes.

   ![Integration Name]
   - Integration Name: New Lead Creation

   ![Salesforce.com object to integrate with]
   - Account, Asset, Campaign, Case, Contact, Contract, Lead, Opportunity, Product, Solution, User
4. Select the available **Salesforce.com** object to integrate with from the list box. Once you proceed you will not be able to reselect a different object unless you delete the current integration.

5. Click **Next** to confirm your choice, save your progress and move onto the next step.

![Image of Salesforce.com integration interface]

6. Select the **Salesforce.com** field and map it with the survey item.

**NOTES:**

- All required fields of the **Salesforce.com** object are highlighted in yellow and must be mapped with the survey items;
- Any survey items that are not applicable with Salesforce.com fields are grey;
- Any survey questions that are hidden in your survey cannot be synchronized with Salesforce.com fields and are not displayed in the Survey Items list box;
- For more information about synchronizing Salesforce.com fields with survey items, see the Synchronization Rules chapter of this manual section.

7. Specify Data Flow Direction by choosing one of the following option buttons:

- **To** - Data transfers from your Salesforce.com account to the Key Survey. The survey questions appear auto filled before taking the survey;
- **From** - Data transfers from Key Survey to your Salesforce.com account after the survey has been submitted by the respondents;
- **To and From** - The combined type of data flow direction is used.
- You may choose to clear the Overwrite with empty responses option to overwrite the existing Salesforce.com data with empty survey response, if user did not answer the survey question. By default, this check box is selected.
8. Click the **Apply mapping** button to save selected mapping.

9. Click **Next** to save your settings and move onto the next step.

10. Copy the generated URL on this page into your email template in your Salesforce.com account. This survey link is now ready to be distributed. You may also launch your survey from your Key Survey account any time later.

11. Click the **Finish** button to save changes and finish synchronization setup.

After your survey has been launched through SalesForce and has been submitted by your respondents you can easily access survey results directly from your **Salesforce.com** account. Link to the 'By Respondent' report will be generated and saved to **Activity History** within a **Salesforce** object integration was performed with.
Viewing and Modifying the Current Integration Setups

Once the integration rules are set up, you can view them in the mapping table at the bottom of the page. The table contains the list of your current integrations. The table includes the following information:

<table>
<thead>
<tr>
<th>Name</th>
<th>Integration type</th>
<th>Link to distribute</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Lead Creation</td>
<td>Lead</td>
<td><a href="http://www.keysurvey.com/survey/398363/311b/?$FOld=LEAD&amp;$FObjID=">http://www.keysurvey.com/survey/398363/311b/?$FOld=LEAD&amp;$FObjID=</a> (i&amp;LID)&amp;$FMapId=3391</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** if any errors are detected, the problem integration is highlighted in red. The possible errors could be:

- The survey question used in this mapping does not exist – most likely the survey question was deleted after the integration had been created.
- Object field used in this mapping does not exist – the Salesforce.com object was altered after the integration has been created and the object field used in this integration no longer exists.
- Data type mismatch or the specified object field is read or write protected – there may be two reasons for this error. One of them is that the Salesforce.com object field type is not compatible with the question type in your survey. The other reason is that the Salesforce.com object field used in this integration is either read or write protected.
### Synchronization Rules

The following table lists the question types and the compatible types of Salesforce.com object fields next to them:

<table>
<thead>
<tr>
<th>Question Type</th>
<th>Data Flow Direction</th>
<th>Types of Salesforce.com object fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick One or ‘Other’ or Pick One with ‘Comment’ [QX]</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>Picklist, all elements except ‘other’.</td>
</tr>
<tr>
<td>Pick One or ‘Other’ [QX.AN], where N is the number of ‘other’ answer option.</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>String, int, double, currency, email, percent, phone, dateTime, url, date, byte, ID, reference.</td>
</tr>
<tr>
<td>Pick One with ‘Comment’ [QX.AN], where N is the number of ‘Comment’ answer option.</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>String, int, double, currency, email, percent, phone, dateTime, url, date, byte, ID, reference.</td>
</tr>
<tr>
<td>Check All that apply [QX]</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>Multipicklist (if other is missing).</td>
</tr>
<tr>
<td>Check all that apply [QX.AN], where N is the number of ‘Other’ answer option.</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>String, int, double, currency, email, percent, phone, dateTime, url, date, byte, ID, reference.</td>
</tr>
<tr>
<td>Dropdown box [QX]</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>Picklist.</td>
</tr>
<tr>
<td>Single line text with pre-format options [QX.AY]</td>
<td></td>
<td>String, int, double, currency, email, percent, phone, dateTime, url, date, byte, ID, reference.</td>
</tr>
<tr>
<td>Numeric Allocation [QX.AY]</td>
<td>&lt;&lt; &gt;&gt;</td>
<td>Int, double, currency, percent, byte.</td>
</tr>
<tr>
<td>Rate different items along the scale of your choice - is not applicable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compare one against another - is not applicable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3D Matrix - is not applicable.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section Header - is not applicable.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IV – SURVEY REPORTS

• Reporting Basics
• Summary Report
• Advanced Report Features
Reporting Basics

- Report Home Page
- Naming your Report
- Viewing and Customizing Report Questions
- Designing Report Layout
- Setting Report Rules
- Publishing Options

Report Home Page

The Reports Home page displays a list of all existing reports and allows you to create new reports. Using our sophisticated reporting tools, you can view and manage survey results and produce critical data indices for distribution.

Click Reports from the main navigation menu at the very top of your account. The Reports Home page consists of three panes:

- **Folders Pane** – is located in the left part of the screen. There are three higher-level folders:
  - Main folder represents surveys folder tree. It includes survey folders with the default Standard Reports.
  - Custom folder is empty by default and is used to store custom reports of any survey.
  - Trash folder is used to keep deleted reports, so you can restore than at any time

- **Reports Pane** – lists reports for the selected survey.

Folders Pane

First level sub-folders represent survey folders and second-level sub-folders represent surveys themselves. Clicking such sub-folder will list you the reports for a particular survey.

You can create new folders for each of the survey folders. Click the New button for that.
Reports Pane

This pane contains reports for the selected survey. By default there is a Standard Report only, which can not be deleted or customized.

To apply custom look and feel for the survey report, Custom Reports are used:

1. Click the New Report or Copy button.
2. Name your report and click Next to proceed.
3. Newly created report is a copy of Standard Report. You can customize it to meet required look and feel, calculate statistics and build graphs. For more information, consult the New Report chapter.

Use the sorting drop-down box to sort the displayed reports. ‘Active Reports on Top’ is the default option.

You can move custom reports to the custom folders or to the Trash folder. Use the Move and Delete buttons for that. Standard Reports can not be moved or deleted.
Report Information Pane

Shows short piece of information for selected report and controls to edit and publish it.

- **Edit** – click this button to edit selected report. This option is not available for **Standard Reports**.
- **Run** – opens summary report in a new window. For more details consult the **Summary Report** section of this manual.
- **Publish** – click this button to navigate to the **Report Publish** page where you can export your survey results to Excel, CSV, SPSS and PDF, as well as retrieve online report link or send it via email.
- **Name** – displays report name, which can be edited from the report **Name** page or directly from this pane by clicking on it.
- **Title** – displays report title, which can be edited from the report **Name** page or directly from this pane by clicking on it.
- **Export to Excel** – exports report data to Excel.
- **Export to CSV** – exports report data to CSV.
- **Export to SPSS** – exports report data to SPSS.
- **Export to XML** – exports report data to XML.
- **Open in WorldAPP Analytics** – this option requires login to the **WorldAPP Analytics** tool. Using this option you can perform advanced and flexible data analysis.
- **Email Report** – sends report to the indicated email addresses.
- **Go to Source Survey** – click this link to get back to the source survey editing pages.
Naming your Report

To name new report or edit existing custom report go to the Report Name page. There you can provide name, title, introduction and notes for custom report.

1. Select the survey to view the report for from the Folders Pane in the left.

![Image](image-url)

2. Click the New Report button from the Reports Pane to create a new report for selected survey.

3. Use the Report Name text box to create a name for your report that will be used within a system only.

4. Use the Report Display Title text box to create a title for your report. The title appears in the online, PDF,
Excel, SPSS and CSV reports.

5. Use the **Report Introduction** text box to describe the purpose of your report. Description text appears below the report name within online and when exporting your report.

6. Use the **Notes** text box to write short notes regarding this report (for internal purposes only). This field is not displayed in the online report.

**Viewing and Customizing Report Items**

Report items can be customized on the **Edit Report** page. There you can also access all reporting tools and available functionality. In this sub-section you will find short description of page controls and features. Detailed information can be found in the further sections.

1. **Ribbon toolbar** contains the following options:
   - **Text, Images, Formulas** for adding respective items to your report.
   - **Crosstab/Group Chart** for creation of complex crosstabs with graphs and statistical data.
   - **Statistics** that helps you to create advanced statistics tables.
   - **More** dropdown with **Share Calculation** and **Significance** features available.
   - **Setup filter** allows you to apply complex filtering to your report.
   - **Header** allows you to add a header to the report.
   - **Footer** allows you to add additional information at the bottom of the report page.
   - **Additional Settings** for your report.
   - **Report Plugins** section.
   - **Defining Respondent groups** allows you to group your respondents.
   - **Edit Scales** is used to edit labels and assign values to existent scales.
   - Also, you can **Run** your report and **Publish** it from here.
2. The **Inline Editing** feature is available for the report **Items** page so you can quickly and easily edit report name, title, question and answer options text. Mouse over on the element you want to edit so the ✍️ icon appears and click it.

3. The question number field. Indicates the number of the question within a report. This field is editable. It allows you to change the order of your questions by entering the ordinal number in this field. Make sure to save items position afterwards.

**NOTE:** If the question (N) is given the number (N+1), the order of the question will remain the same. For example, if the 5-th question is given the number ‘6’, no changes will be applied. To replace the 5-th question with the 6-th one, you should set the 6-th question to be the 5-th one or specify both question fields with contrary numbers and click Save. **NOTE:** The question order that is set on this page displays in the Report Summary only. In individual reports, questions are displayed in the order set on the **Edit Survey** page.

4. Select the **Show all text responses** option to expand all text responses in online report.

5. Select the **Show text responses** option next to specific text response you want to expand in the online report.

6. Select the **Hide All** option and no questions or elements will appear in the online report.

7. Click the **Add Logo** button to add logo to your custom report.

8. Select the **Hide** option, next to specific report question or item you want to hide in the online report.

9. Click **Preview** to see how the specific report question or element looks in the online report.

10. Click **Edit** to modify the specific report question or element, apply statistics or customize graph for that item.

11. Click **Filter** to filter the specific report question.

12. Click **Insert** to select one of the following elements (for the specific question): Text & images, Crosstab, Advanced Crosstab, Significances or Share calculation.

13. Click **Graph** Icon to view and customize report question graph.
Designing Report Layout

Click on the Layout button on the ribbon toolbar. Here you can design or edit your report layout. You can apply custom colors to your report for branding effects to match your corporate colors or meet any other design specifications.

1. Select the element you want to apply custom layout from the left column. This can be any report element such as title, description, summary text and others.

2. Modify font family, font size, font color, background color, text alignment and other options you need for the selected element.

3. Click the Save button to save changes.

4. Click Run Report to preview the online report.

5. Click the Edit CSS button to edit report CSS and advanced formatting.

6. Click Default button to discard the customization made.

<table>
<thead>
<tr>
<th>Report title</th>
<th>Font family: Verdana, Geneva, Arial, Helvetica, sans-serif</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Font size: 16px</td>
</tr>
<tr>
<td>Odd answer</td>
<td>Font color: black</td>
</tr>
<tr>
<td>Even answer</td>
<td>Background color: white</td>
</tr>
<tr>
<td>Summary text</td>
<td>Font style: B    I   U</td>
</tr>
<tr>
<td>Question text</td>
<td>Text alignment:</td>
</tr>
<tr>
<td>Report text</td>
<td>Vertical alignment:</td>
</tr>
<tr>
<td>Report numbers</td>
<td>Border style: none</td>
</tr>
<tr>
<td>Table heading</td>
<td>Border size:</td>
</tr>
<tr>
<td>Table content</td>
<td>Border color:</td>
</tr>
<tr>
<td>Answer text</td>
<td></td>
</tr>
<tr>
<td>Summary line</td>
<td></td>
</tr>
</tbody>
</table>
Defining Report Settings

Settings define report behaviour and allow you to add or remove different controls.

1. Set what type of surveys to include in the report:
   - **Completed surveys only** displays only completed survey responses in the report.
   - **In Progress** includes partially completed survey responses in the report.

   **NOTE:** Partially completed responses, which have not been distributed via our email system, can be saved and included in a report if the 'Do not allow respondent back into survey' or 'Respondent may return and modify their response' rule has been set on the survey Rules page.

2. Select the **responses as % of all answered the question** option, to use a percentage calculation based on the total number of respondents for the particular survey question.
3. Select the **responses as % of total submitted surveys** option to use a percentage calculation based on the total number of survey respondents.
NOTES:

- A **No Response** item appears for the following question types: Pick one, Check all, Dropdown box, and List box. It contains the number of respondents who did not answer the question, as well as the percentage calculation.

- A **No Response** column appears for the Rate different items along the scale of your choice question type, including the number of respondents who did not select any scale in the particular row (answer) as well as the percentage calculation.

Use the following options to indicate additional rules and preferences:

- If the **Totals** option is selected, the report shows information on the total number of respondents for each question.

- If the **Unanswered questions in summary report** option is selected, the Report Summary includes questions with no responses.

- If the **Unanswered questions in report by respondent** option is selected, the Report by Respondent shows questions the respondent skipped.

- If the **Individual responses button** option is selected, you can opt to view answers that were typed in manually by the respondents.

- Select the **Hide respondent IDs/email** option to hide information about respondents’ emails or other identifiers while exporting your survey results to Excel, PDF or in the Report by Respondent.

- Select the **Show Navigation** option to show the list of report questions and elements in the Summary Report that allow quick navigation in online report.

Set filtering, exporting and conversion rules:

- Select the **Filter option** to allow report view filter responses online, thus the **Add Filter** button will be shown in the Summary Report. For more information, see the **Remote Filter** section of this manual.

- Select the **Export to Excel option** to allow report viewer to export survey results to Excel file (.xls) (for the Summary Report) online.

- Select the **Convert individual responses to PDF** option to allow the report viewer to convert individual responses to PDF format (for the Report by Respondent).

- Select **Convert to PDF option** to allow the report view to convert summary report to PDF format.

2. **Link answers** to certain questions if required.

3. Choose the **Language** you wish to present your report in.

4. Click the **Save** button to save all changes.

5. Click **Run Report** to preview online report.

6. Click **Back** to return to the **Edit Report** page.
**Publishing Options**

You can secure survey results, modify your report link, set password and manage your publish options as well.

1. **Report link**
   - Default
   - Other

   You may copy and paste the **URL** below:
   

2. **Report status**
   - Public report
   - Private report

   Custom note:

3. **Publish options**
   - Email report
   - Print report
   - Export to Excel
   - Export to SPSS
   - Open in WorldAPP Analytics
   - Export to XML
   - Export to CSV

4. **New FTP upload**

---

1. **Specify options for your Report Link:**
   - Select the **Default** option to use the default report link.
   - Select the **Other** option to select KeySurvey URL, IP address link or Customize URL option. For detailed instructions on how to generate custom report link, see the **Customize URL** section of this manual.

2. **To run the report, copy the URL and paste it into the address field of your browser.**

3. **Specify options for the Report Status:**
   - The 'Private' option is selected by default. This means that the report is accessible via the report link if only you are logged into your account. Use the **Custom Note** text box to enter your custom message which appears if following the report link from outside of your account.
   - If the 'Public' option is selected, report is accessible via the report link from any location. The **Set password** option sets a user password for viewing the report.

4. **Specify Publishing Options:**
   - Select the **Email report** option if you want a link to this report emailed to your address. For additional details, see the **Email Report** section of this manual.
Survey Reports

- Select the **Print Report** option to convert your summary report or individual results to PDF. For additional details, see the **Print Report** section of this manual.
- Select the **Export to Excel** option and click the **Export To Excel** button to export your report to Excel. For details on how to export your data into Excel, see the **Export to Excel** section of this manual.
- Select the **Export to SPSS** option and click the **Export To SPSS** button to export your report to SPSS. For details on how to export your data into SPSS, see the **Export to SPSS** section of this manual.
- Open in WorldAPP Analytics – this option is used to integrate report data with WorldAPP analytics.
- Select **Export to XML** to export responses to XML.
- Select the **Export to CSV** option and click the **Export To CSV** button to export your results in a `comma delimited text file` (.csv). CSV files can then be saved into any spreadsheet programs such as Excel, Microsoft Access or FileMaker. Make sure that comma is indicated as list separator for numbers in Regional Options on your Control Panel.

**NOTE:**

- Excel does not allow you to import more than 256 columns in one row. Three columns are involved to indicate Respondent’s number, Submit Date and Email and one column is needed for each answer choice. This means you can import up to 253 answer choices on a spreadsheet and if you have more data, it will be listed on other spreadsheets.
- If you export your report to CSV and open it in MS Excel, please change the default name of the file to save it properly (this concerns Internet Explorer 6.x_sp2 or Mozilla Firefox 1.x browsers particularly).

**5.** Click **Save** to save your changes.

**6.** Click **Next** to go to the **Email Report** or **Print Report** pages if the according options are selected.

**7.** Click **Back** to return to the **Edit Report** page.
Summary Reports

Summary report shows you the summary per all survey questions and all survey respondents on one page.

**Employee Review Survey 2013 - Logical Transitions**

<table>
<thead>
<tr>
<th>Employee details</th>
<th>Response total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name:</td>
<td>1</td>
</tr>
<tr>
<td>Employee Email:</td>
<td>2</td>
</tr>
<tr>
<td>Employee ID:</td>
<td>2</td>
</tr>
<tr>
<td>Job Title:</td>
<td>2</td>
</tr>
<tr>
<td>Date:</td>
<td>2</td>
</tr>
<tr>
<td>Department:</td>
<td>2</td>
</tr>
<tr>
<td>Manager:</td>
<td>2</td>
</tr>
</tbody>
</table>

Total # of respondents 2. Statistics based on 2 respondents: 6 filtered: 0 skipped.

<table>
<thead>
<tr>
<th>Communication</th>
<th>Response percent</th>
<th>Response total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management did a good job communicating about changes or decisions that affected employees</td>
<td>50%</td>
<td>1</td>
</tr>
<tr>
<td>I am able to contact senior management when needed</td>
<td>100%</td>
<td>2</td>
</tr>
<tr>
<td>I have enough information to do my job well</td>
<td>100%</td>
<td>2</td>
</tr>
<tr>
<td>Manager communicated a clear sense of direction for my organization</td>
<td>50%</td>
<td>1</td>
</tr>
</tbody>
</table>

**Export Graph**

<table>
<thead>
<tr>
<th>Review Period:</th>
<th>Response total</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>2</td>
</tr>
<tr>
<td>To</td>
<td>2</td>
</tr>
</tbody>
</table>

1. The **Report Index** at the very top of your report lists you all report items, thus you can navigate to the desired item at one click. You can click the roll over icon in the left to expand or collapse the index.

2. Click the **View by Respondent** button to view the report of the specific respondent.
   **NOTE:** This feature is activated on the Report Rules page, by default. For additional details, see the **Report Rules** sub-section of this manual.

3. Questions except the open-ended and section heading questions, are represented with the graphs. Click **Export Graph** to export responses in graphic format to **PowerPoint**.

4. Click **Top** to navigate to the top of the page.

5. Click **Hide** to collapse the text answers in the report. This option is available if you activated **Show Text Responses** from the **Edit Report** page.

6. Click **View** next to the text item to see the list of text responses for that particular item.

7. If you click the hyperlinked responses number, you will be redirected to the **View by Respondent** mode.
View by Respondent Report

This type of report shows exactly how each particular respondent answered your survey questions.

- At the top of by respondent report you will see navigation controls that allow you to switch respondents. You can also input respondent sequence number and click the Go button to navigate to that response at one click.

**NOTE:** Respondents are arranged according to the date the survey was submitted (the report for the last submitted survey is at the end of the list).

- Submit dates and Email addresses are displayed at the top of the page. If you use anonymous survey distribution, you will not see email addresses. Keep in mind if there was no response to a question, you will not see it in the report by default.

- The Edit Responses option you can edit records on your respondent’s survey results. Click Edit to resubmit the responses.

- Click Delete Response to permanently remove a response from the survey results. Keep in mind - you cannot restore deleted records! For additional details, see the Delete Responses section.

- Click Back to return to your summary report.

While editing survey responses, please note:

- All restriction settings are canceled. The Back survey button is always active and one can take the survey again – however, redirection is canceled, password question does not appear and start and expire dates are ignored.

- The time limit for respondents does not change.

- When you click the Submit button, all changes are saved. The intermediate results are not saved.

- If you want to de-select a radio button, click the radio button again.

- Email Alerts are blocked and not sent.

- Old results are overwritten and cannot be restored.
Advanced Report Features

- Edit Questions and Answers
- Insert Text and Images
- Expand Text Responses
- Question Graph
- Define Respondent Groups
- Add a Report Header and Footer
- Edit Scales
- Results of Significance Testing
- Share Calculation
- Crosstab/Group Charts
- Significance
- Statistics Tables
- Delete Responses
- Filtering Results
- Advanced Filter
- Filter Logic
- Remote Filter
- Instructions on Report Filtering
- Custom Filters for Report URL
- Email Report
- Print Report
- Export to Excel and CSV
- Export to SPSS
- Export to XML
- Upload to FTP
- Statistical Reporting
- Statistical Quantities Calculation
- Time Series
- Time Series Graph
Edit Questions and Answers

You can edit labels in the report question and answers. Such customization will not affect survey itself and will be displayed in the report only.

1. Click the Edit button next to the question from the Edit Report page.

2. Use Edit question text (Step 1) to create a short description or definition of the question. This text is used instead of the original question text, in the online report, export, PDF and/or crosstab tables.
3. Use the **Edit label for each line** text boxes (Step 2), to edit answer choices’ texts. This text is used instead of the original answer text, in the online report, export, PDF, crosstab tables.

4. Assign different numerical values to each answer choice. These values are used for statistics calculations and exporting to SPSS, CSV, WorldAPP Analytics or Excel.

**NOTE:**
You can assign values to questions of the following types: **Pick one or 'Other', Check all that apply, List box and Dropdown box.**

5. You can hide particular answer choices within the summary report. Hidden answer options will be excluded from statistical calculations. Use the **Hide** option for that.

6. Select **Exclude from calculation** to exclude answer choices from the statistical calculations.

7. Click the **Filter** button to filter responses for a particular question, so only those filtered responses appear in the report.

8. If you apply filters for answer options, the **Filter on** option appears. Thus you can turn filters on or off without deleting filters themselves. For more details, see the **Filtering Results** section of this manual.

9. Click the **Statistics** button (Step 3), to select the statistical quantities to use in the report. For more details, see the **Statistical Reporting** section of this manual.

10. Click the **Time Series** button (Step 3), to add tables to the report, according to the survey submit dates. For more details, see the **Time Series** section of this manual.

11. **Edit Graph** option (Step 4) allows to customize question graph. You can change graph type and customize it to better meet your needs.

   - **Show numbers** option displays the number of respondents in a question table or graph.
   - **Show percent** option displays the percentage of respondents in a question table or graph.

12. Click **Save** to save your settings.

13. Click **Preview** to see that particular question in a preview mode.

14. Click **Back** to go back to the **Edit Report** page.
Insert Text and Images

By defaults summary report contains survey questions. But you can customize it and add any text or image objects.

1. Click the **Insert** button from the **Edit Report** page and select the **Text and Images** option or hit the **Text, Image, Formula** button on the ribbon toolbar.

   1. **Enter your text below**

      This set of questions will be used to calculate NPS

   2. **Create and insert formula**

   3. **Add Image**

      Image file: [Choose File] logo.png gif
      (Under 500 kb. jpg, jpeg, gif, bmp, png only)
      Description: (Respondents will see if image cannot be displayed)
      Page URL: https://www.keysurvey.com
      (On clicking image this page will pop up)
      Align: Left

2. Use the **Enter your text below** text box (Step 1), to create the item text.
3. Based on the collected responses you can create custom expressions using formulas. 
   **For example:** You can calculate number of respondents who answered particular questions. 
   Click the **Create Formula** button (Step 2) for that.

4. Name the new formula. You can later use the same formula in other items and reports.

5. Provide the formula expression. 
   **For example:** \([Q1.A2.C3]\) represents the number of respondents belonging to the group who selected answer 2 in column 3 of question 1. You can also use the following logic and calculation operators as well: AND, OR, NOT, +, -, *, /, ( ) and |.
   **For example:** \([Q1.A2.C2 OR Q1.A3.C2]*100- (Q1.A2.C2 OR Q1.A3.C2)/0.34\)
   When formula is created click Insert to insert it to the Item text, where you want it to appear.

6. Click the **Browse** button (Step 3) to upload an image file.

   **NOTE:** The image size should be under 300 kb.

7. Define image alignment, specify the redirect URL to redirect the report viewer after the image is clicked, as well as a description that would appear to the report viewer when placing the mouse over it.

8. Click **Save** to save your changes.

9. Click **Preview** to see how your text and image elements look.

10. Click **Back** to return to the **Edit Report** page.
Expand Text Responses

If your survey contains responses to the open-ended questions, these responses will be collapsed and will not be displayed in the summary report by default. But you can expand text responses when converting summary report to PDF.

1. Select the **Show text responses** option for each of the text responses you want to expand in the online report.

2. Select the **Show all text responses** option to display all text responses that appear in the survey.

Here is the example Summary Report with expanded text responses:
Question Graph

Summary report represents survey questions as graphs except the heading and open-ended questions such as Single Line and Multiline.

1. Click the Edit Graph button on the Edit Report > Edit Single Question page, to customize the question graph. You can also navigate to the Edit Graph page by clicking graph icon next to the question on the Edit Report page.

2. Select type of graph you want to apply to the current question.

<table>
<thead>
<tr>
<th>Edit question text</th>
<th>Communication</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Edit label for each line</th>
<th>Value</th>
<th>Hide</th>
<th>Exclude from calculation</th>
<th>Filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management does a good job communicating with me</td>
<td>1</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>I am able to contact Senior Management when required</td>
<td>2</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>I have enough information to do my job well</td>
<td>3</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>Managers communicate a clear sense of direction</td>
<td>4</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>No Response</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Graph Type**

- Default
- Horizontal bar 3D
- Vertical bar 3D
- Pie 3D
- Horizontal bar 2D
- Vertical bar 2D
- Pie 2D
- No graph
3. You can choose **Bar** graph, **Pie** graph or turn the graph off.

4. Under the 2nd step define graph size and alignment.

5. Graphs have the following options (pie charts do not have some of the listed options):
   - Scale diagram in **totals** or **percent**.
   - Captions on the graph can be shown as **labels** or as **legend**. Legend is commonly used for overcrowded graphs with many objects and points.
   - **Show question** in title option displays question at the top of the graph as a title, otherwise graph has no title at all.
   - Select the **Rank in order** option to arrange the items in descending order.
   - Select **Zoom in** to enlarge the diagram to the actual margins.
   - **Show axis labels** to give names to the graph axis instead of the default names.
   - **Show values next to bars** to show the value each graph bar represents.
   - **Show threshold values** – if you have a threshold value for the collected data and want to compare collected results with this value, select this option and indicate threshold value. Thus you will see how the collected data differs from the data you expect to see.

6. Pie Graphs has additional options:

7. **Show Legend** shows which color of the pie chart corresponds to the selected answer choice.

8. **Exploded** is used if you want to single out particular answer choice from a pie.

9. Apply custom colors to the chart elements (Step 5). You can select among the predefined colors or provide hexadecimal code if none of them suit your specifications.

10. Click the **Save** button to save your changes.

11. Click **Preview** to view generated graph.
To export graph to PowerPoint:
1. Move your mouse pointer over the graph when previewing it.
2. Right-click if you are a PC user or Command+click for MAC.
3. Select the **Copy** option.
4. Open the Powerpoint document.
5. Select Paste to paste the graph.
6. Save the presentation.
Define Respondent Groups

Respondents groups are used to combine respondents per certain criteria and then use those groups in advanced crosstab tables or for calculating 'Share and Significances'.

1. Click the **Respondent groups** button on the ribbon toolbar on the *Edit Report* page.

2. Click the **New group** button to create new group of respondents.

- **List of groups**
- **New group**

**Group name**

Group 1

**Edit description**

- **Primary**

**Define members for this group**

3. Name new group and provide the description if you want to note additional details for this group.

4. Select the **Primary** option to set this as the primary group.

5. Define group members using logic expressions (3) (see the example below).
   
   **EXAMPLE:** Q1.A2 AND (Q3.A5 OR Q4.A1) respondents group will include only those respondents who selected both answer 2 in question 1 and either answer 5 in question 3 or answer 1 in question 4.

   **NOTE:** 3D Matrix and Rate Items question types should be specified as Q1.A2.C3 (it means that answer 2 is selected in column 3 in question 1).

6. Click **Save** to save changes and create new group.

All created groups will be listed in the groups table. You will need to use G1, G2 and so on in advanced crosstabulation or any other report items to reference to certain group.

<table>
<thead>
<tr>
<th>Primary</th>
<th>#</th>
<th>Group Info</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>G1</td>
<td>Group 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>G2</td>
<td>Group 2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add a Report Header and Footer

Similarly to the survey, you can add header and footer to the summary report. They will appear at the very top and very bottom of each report page.

1. Click the **Header** or **Footer** button on the ribbon toolbar on the **Edit Report** page.

2. Provide Header or Footer text depending on the option you selected in the previous step.

3. **Spell Check** checks the spelling of the entered text.

4. **Clear** will remove all the text from the text field.

5. Specify the alignment ('Left', 'Center' or 'Right').

6. Click **Save** to save changes.

7. Click **Back** to return to the **Edit Report** page.
Edit Scales

This feature allows you to add labels and assign values to your scale elements that were used in the survey Rate and Matrix questions.

1. Click the **Edit Scales** button from the ribbon toolbar on the **Report Items** page.

2. **Label** column contains default scale elements labels. You can customize them, thus this text will be used instead of the original scale labels in online report, export, PDF, crosstab tables.

3. Provide new values if necessary. These values will replace corresponding answer choices when you export your report to SPSS, XML, WorldAPP Analytics or Excel. The values are set up by default. If you edit them you can reset them to default by clicking **Retrieve defaults**.

4. Click **Save** to save your settings.

5. Click **Back** to return to the **Edit Report** page.
Results of Significance Testing

This feature allows you to create a table or graph, to show results of significance testing in the online report. This feature includes the following indices: Number, Percent, Response Rate, Lift and Difference.

1. Click the **Insert** button from the *Edit Report* page of your report and select **Significance** option or find it in the **More** dropdown on the ribbon toolbar.

2. Name your table/chart for significance calculation and provide the description if any.
3. Survey questions will be used as table rows. Select appropriate question and add them to the row responses.

4. **Select brand of interest** to calculate statistics and display graph for the selected "brand". Note that this option is used along with the **display as Chart** option.

5. Select the pair of control and test group and click **Apply**.

6. Click the **Edit Groups** button to add new or edit existing groups.

7. Define sample for table/chart to calculate significance. Enter a logic expression to filter all the selected groups. **For example**: Q1.A2 AND (Q3.A5 OR Q4.A1).

8. Select the options upon which you want to calculate significances (Step 5). These will be displayed beneath the Significance chart for the brand of interest.

9. Show significances calculations as a table or/and as a chart.
Example of the Significances calculation as a table:

<table>
<thead>
<tr>
<th>Significances calculation as a table:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Managers communicate a clear sense of direction for my organization</strong></td>
</tr>
<tr>
<td><strong>Number</strong>: 2</td>
</tr>
<tr>
<td><strong>% Percentage</strong>: 86.67%</td>
</tr>
<tr>
<td><strong>Response Rate</strong>: 0.6666667</td>
</tr>
<tr>
<td><strong>Difference</strong>: 0.3333333</td>
</tr>
<tr>
<td><strong>Lift</strong>: 0.3</td>
</tr>
<tr>
<td><strong>Zscore</strong>: 1</td>
</tr>
<tr>
<td><strong>Probability</strong>: 0.6826893</td>
</tr>
<tr>
<td><strong>Significance</strong>: NS</td>
</tr>
</tbody>
</table>

Example of the Significances calculation as a chart:
CALCULATION FORMULAS

Values calculated for either control or test groups separately:

<table>
<thead>
<tr>
<th>Name</th>
<th>Formula</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number (n)</td>
<td></td>
<td>Equals the number of respondents belonging to this group who selected this answer choice</td>
</tr>
<tr>
<td>Percent (%)</td>
<td>Number / general number of respondents in group * 100%</td>
<td>Equals the number, divided by the general number of respondents in this group and multiplied by 100%</td>
</tr>
<tr>
<td>Response rate</td>
<td>Number / general number of respondents in group</td>
<td>Equals the number, divided by the general number of respondents in this group</td>
</tr>
</tbody>
</table>
Share Calculation

This feature allows you to create a table or graph to show the results of share calculation in the online report.

1. Click the **Insert** button from the **Edit Report** page of your report and select **Share Calculation**.

2. Name the table/chart item and provide the description if necessary.
3. Select row responses for the Share Calculation table. Only questions that expect numeric answers (Single Line, Numeric allocation and 3D Matrix with the applied formats like Percent, Number>0 and others) can be used.

4. Use the **Select brand of interest** dropdown box, to choose one of the responses to calculate statistics for.

5. Select the pair of control and test group and click **Apply**.

6. Click the **Edit Groups** button to add new or edit existing groups.

7. Define sample for table/chart for share calculation. Enter a logic expression to filter all the selected groups.
   - **For example:** Q1.A2 AND (Q3.A5 OR Q4.A1).

8. Select the significances which you would like to calculate (Step 5). These will be displayed beneath the Share Calculation chart for the brand of interest.
9. Show share calculation as a table or/and as a chart.

Example of the Share calculation as a table and as a chart:

<table>
<thead>
<tr>
<th>Sample Size</th>
<th>Control1</th>
<th>Test1</th>
<th>Control2</th>
<th>Test2</th>
<th>Control1 Share %</th>
<th>Test1 Share %</th>
<th>Control2 Share %</th>
<th>Test2 Share %</th>
<th>Lift 1</th>
<th>Lift 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand A</td>
<td>7.59999999</td>
<td>6.83333335</td>
<td>7.59999999</td>
<td>5.88888888</td>
<td>18.10%</td>
<td>16.57%</td>
<td>18.10%</td>
<td>14.85%</td>
<td>-6.42%</td>
<td>-17.93%</td>
</tr>
<tr>
<td>Brand B</td>
<td>6.80000002</td>
<td>6.90000002</td>
<td>6.60000002</td>
<td>6.16666665</td>
<td>16.19%</td>
<td>16.45%</td>
<td>16.19%</td>
<td>15.55%</td>
<td>1.86%</td>
<td>-3.95%</td>
</tr>
<tr>
<td>Brand C</td>
<td>7.40000001</td>
<td>7.40000001</td>
<td>7.40000001</td>
<td>7.40000001</td>
<td>17.62%</td>
<td>17.95%</td>
<td>17.52%</td>
<td>18.65%</td>
<td>1.86%</td>
<td>5.91%</td>
</tr>
<tr>
<td>Brand D</td>
<td>9.39999996</td>
<td>9.39999996</td>
<td>9.39999996</td>
<td>9.39999996</td>
<td>22.30%</td>
<td>22.80%</td>
<td>22.30%</td>
<td>23.70%</td>
<td>1.86%</td>
<td>5.51%</td>
</tr>
<tr>
<td>Brand E</td>
<td>10.80000002</td>
<td>10.80000002</td>
<td>10.80000002</td>
<td>10.80000002</td>
<td>25.71%</td>
<td>26.19%</td>
<td>25.71%</td>
<td>27.23%</td>
<td>1.86%</td>
<td>5.51%</td>
</tr>
<tr>
<td>Total Average</td>
<td>42</td>
<td>41.20000000</td>
<td>42</td>
<td>39.60000000</td>
<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
<td>-0.90</td>
<td>-4.15</td>
</tr>
</tbody>
</table>

![Graph showing share calculation as a table and as a chart]
## Calculation Formulas

Values calculated for control and test groups:

<table>
<thead>
<tr>
<th>Name</th>
<th>Formula</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average</td>
<td></td>
<td>Responses are summed up according to the corresponding group and answer line and, the amount is divided by the number of respondents.</td>
</tr>
<tr>
<td>Share</td>
<td>Average/Total Average*100</td>
<td>Average is divided by Total Average and, the amount is multiplied by 100.</td>
</tr>
<tr>
<td>Lift</td>
<td>(Share% of Test1 - Share% of Control1)/Share% of Control1</td>
<td>Share of group Control1 is subtracted from share of group Test1 and, the amount is divided by the share of group Control1</td>
</tr>
</tbody>
</table>
Crosstab/Group Charts

Crosstab/Group Charts are used to compare survey responses. For example: How certain groups of people answered other survey questions.

You can apply this feature to the following question types: Pick one or 'Other', Pick one with 'Comment', Check all that apply, List box, Dropdown box and Compare one against another.

NOTE: To create crosstab/group chart for the Rate different items along the scale of your choice question type, you can use answer choices but not scales.

1. Click the Crosstab/Group Chart button from the Edit Report page of your report.

2. Give a name to the Crosstab/Group Chart.

3. Select groups to crosstabulate.
3. Select row, column responses, specify a respondent group or use a predefined group.

4. Choose the statistics you wish to apply.

5. Indicate how you would like your table/chart to appear.

6. Choose the totals you wish to show in the table.

7. Specify the rule for the highlight color for the row total if required.

8. Indicate what you would like to base your percentage calculation on.
NOTE: You can use the whole question or just some answer choices to create Crosstab table. Click on any question marked with a plus sign to expand the list of answer choices. Click any question marked with minus sign to collapse the list of answers.

9. Click the **Save** button to create the Crosstab/Group Chart.

Example of the Crosstab/Group Chart as a table and as a graph:
Crosstab Graphs

This feature allows you to specify the parameters for your advanced crosstab graph, such as: editing the crosstab graph name, axis captions, setting graph type, size and others.

1. Click the Edit Graph button on the Advanced Crosstab page:

2. Name the graph.

3. Select the graph type and define graph size.
NOTE: The graph width should be at least 100 and no more than 2000 pixels, the graph height should be at least 200 and no more than 2000 pixels.

4. Select the **Totals** option to scale the graph in units corresponding to the total amount of respondents.
5. Select the **Percent** option to scale the graph in percent.
6. Select the **Show legend in graph** option, to view labels of the respondent groups on the graph.
7. You can name your graph axes using **Vertical axis title** and **Horizontal axis title** option.
8. Select the **Flip graph axes** option to change axes positions.
9. Click **Save** to save graph settings.
Delete Responses

Survey responses can be deleted in two ways:

- One by one from the View By Respondent report
- List of responses from the Summary Report

1. To remove list of records, click the Delete Respondent button on the Summary Report page.
   **NOTE:** The Delete Respondent button appears in the summary for the Standard Report only.

2. Click the View e-mail addresses or IDs link to see a list of all respondents who submitted your survey.

3. The list of respondents contains respondent's sequence number by date of submit or respondent's email if the survey was launched via Email Survey Distribution or Password Survey Protection. Click a respondent's link (ID#) to view the response.
4. Select responses you want to remove from your report.

5. Click the **Delete Selected Responses** button to remove responses.

**NOTE:**

- If you have text responses, you can click the corresponding link (View text responses) to see the list of respondents who answered this particular question.
- You can remove responses by clicking the **Delete Respondent** button, in View by Respondent mode as well. If you are not viewing your report from your account (for example, if you are using a report URL that was emailed to you), there will not be a **Delete Respondent** button. This security precaution prevents unauthorized actions.
Filtering Multiple Choice Results

Use this feature to define (apply filters to) and customize your report output for multiple choice type questions. Using this feature, your reports display specific survey data to suit your business needs.

1. To filter your report results click the Filter button next to the specific question on the Edit Report page.

2. Select answer choices to filter report by. Only those respondents who selected these specific answers will appear in the report.

**NOTE:** Each selected response is represented with a separate filter.
3. When editing single survey question from the Edit Report > Edit Question page you can turn filters off and back on. This is commonly used for different cases and testing, so you do not delete and recreate all filters once again.

4. Click **Save** to set the filter(s).

**NOTE:** If select multiple questions and answer choices, default filter logic is **OR**. This means that if at least one filter condition is met, respondent will be included in the report.
Filtering Text Results

Besides simple responses filtering you can filter responses to the open-ended questions that expect text responses.

1. To filter your text responses, click the Filter button next to the specific question on the Edit Report page.

2. Specify the response to apply the filter to (Step 2).

3. Click the Add Filter button.

4. Specify the following filtering conditions:
   - That or That do not
   - Contain at least one word – The responses that or that do not contain at least one of the words indicated in the text field, will be included in the report.
**Contain all words** – The responses that or that do not contain all of the words indicated in the text field (regardless of their order) will be included in the report.

**Match** – The responses that or that do not contain the exact text string indicated in the text field (regardless of its position) will be included in the report.

**Equal** – The responses that or that do not contain only the phrase or word indicated in the text field will be included in the report.

5. Indicate filter criteria.

6. Click **Save** to apply the filter.

7. Use the ‘**Active**’ option to turn filter on and off.

**Additional Notes:**

- You can set multiple filters for each text response. Click the **Add Filter** button and follow the steps listed above.

- If you setup multiple filters, the default filter logic is **OR**. Thus those responses that meet the conditions of at least one of your active filters will be included in the report.

- You may have several active filters for **Pick One** and **Dropdown Box** question types. But if you apply two or more filters to such questions, your report will include those responses that meet the conditions of at least one of your active filters.

**EXAMPLE SCENARIO:**

There is a question in the survey that asks for the respondent’s age. The answer options are:

- 18 and younger
- 19-30
- 31-40
- 41-60
- 61 and older

When setting filters, indicate 31-40 as a filtering criteria. Now, only responses of those survey takers who indicated their age as 31-40 will appear in the report.

If both 31-40 and 41-60 are indicated and both filters are active, there will be responses of those survey takers who indicated their age either as 31-40 or 41-60 in the report.
Advanced Filter

Use this advanced feature to apply complex filtering to your reports. **For example:** You can create a report that displays output based on a specific question response or the date and time a survey was submitted. You can apply an unlimited number of filters with this option.

1. Click the **Filter** button on the ribbon toolbar on the *Edit Report* page.

2. Click the **Add Filter** button (1), to begin adding new filters to your report.

3. Select type for each filter that you add.

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**SG:** +65-673-318-35

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4. Select **Question** and only those who gave the specified answer to the selected question, will be included in the report.
   - Use the **Select question** dropdown box to choose the question for filtering.
   - Use the **Select answer** dropdown box to choose the answer choice.
   - Use **Include records** option to specify the filtering criteria for text or number responses (applicable for open ended responses).

   **NOTE:** If you select **No Response** the report will also include those respondents who did not answer the selected question.

5. Select **Date** and only those respondents who submitted the survey during the specified period of time, will be included in the report.

   **NOTE:** If you need today’s report, you should set the filter start date to today and the end date to tomorrow’s.

6. Select **Email** and only those respondents whose email address includes a specific character string, will be included in the report.

   **NOTE:** The email address filtered on is the one that was used for the survey invitation.

Email and text responses filtering:

7. **That** or **That do not**
   - **Contain at least one word** – The responses that do or do not contain at least one of the words indicated in the text field, will be included in the report.
   - **Contain all words** – The responses that do or do not contain all of the words indicated in the text field (regardless of their order) will be included in the report.
   - **Equal** – The responses that or do not contain only the phrase or word indicated in the text field will be included in the report.
   - **Match** – The responses that or do not contain the exact text string indicated in the text field (regardless of its position) will be included in the report.
   - **Match wildcard** – the responses will be included in the report according to the following rules:
     - ? - substitutes as a wildcard character for any one character
     - * - substitutes as a wildcard character for any zero or more characters.
   - **Match RegExp** – The responses that meet or do not meet regular expression criteria will be included in the report.
   - **Match Fulltext** – responses that match or do not match indicated criteria will be included in the report.

   You can use the following logic operators for specifying advanced text filter criteria:
   - & - is used to indicate logical AND;
   - < - is used to indicate logical ordered AND, which means that words must appear in the strict order as was indicated;
   - | - is used to indicate logical OR;
   - ! - is used to indicate logical NOT.
Date responses filtering:

7. That are or That are not
   • Equal to – The responses that do or that do not contain only the date indicated.
   • Earlier than – The responses that or that do not contain dates until the date specified.
   • Earlier than or equal to – The responses that or that do not contain dates until the date specified inclusive.
   • Later than – The responses that or that do not contain dates after the date specified.
   • Later than or equal to – The responses that or that do not contain dates after the date specified inclusive.
   • Between – The responses that or that do not contain the specified from and to dates.

Numeric responses filtering:

7. That are or That are not
   • Equal to – The responses that do or that do not contain only the numeric value specified.
   • Greater than – The responses that or that do not contain values until the numeric value specified.
   • Greater than or equal to – The responses that or that do not contain values until the value specified inclusive.
   • Less than – The responses that or that do not contain values after the numeric value specified.
   • Less than or equal to – The responses that or that do not contain values after the numeric value specified inclusive.
   • Between – The responses that or that do not contain the specified from and to numeric values.

8. Enter the word(s) or characters as a filter criteria. Use a space character as a separator, if your search will be based on more than one word.

9. Use the Active option to turn the filter on and off.

10. If you have set more than one filter, you can specify the way of combining the filters in the Filter Logic section (Step 2).

2 Filter logic Each filter is signified by F1, F2, ..., FN
   ○ Apply "AND" logic (F1 AND F2 AND F3 AND ...)
   ○ Apply "OR" logic (F1 OR F2 OR F3 OR ...)
   ○ Apply customized Logic (User defined expression)
   (F1 AND F2) OR F3

• Select the Apply AND logic option to see a report based on those respondents whose answers meet the conditions of all your active filters.
• Select the Apply OR logic option to see the report based on those respondents who meet the conditions of at least one of your active filters.
• Select the Apply customized Logic option to use combined filtering. Specify the way of combining your filter in the text field.
- Use Fx tokens to denote filters. Where x is the filter sequence number.
- Use **AND** and **OR** operators to denote relationships.
- Use parentheses to make your logic unambiguous.

**NOTE:** Only filters entered in the text field are used to create the report. For more details, see the Filter Logic section of this manual. Also, note that after saving the customized logic operators will be replaced with respective special symbols: || for OR and && for AND.

11. Click **Save** to apply the filter logic.

12. Click **Run Report** to preview report.

13. **Select questions for masking results** option is commonly used to make summary report results less liable to respondents identification in a small respondents sample. You can specify the number of respondents and enter symbols to replace survey results with. Thus if the number of respondents to the selected questions is less than you specified, your survey results will be replaced with indicated symbols and will not be shown within the report. If number of respondents becomes more that the indicated number, data will not be masked and will be displayed within the report.

14. Click **Save** to apply your filter.
Examples of filtering based on email addresses or text responses:

**NOTE:** Text in red meets filter condition and is included in the report.

<table>
<thead>
<tr>
<th>Entry Types</th>
<th>Conditions</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contain at least one word</strong></td>
<td>Cat</td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathlene</td>
</tr>
<tr>
<td></td>
<td>Red Cross</td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
<tr>
<td><strong>Contain All words</strong></td>
<td>Cat</td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathlene</td>
</tr>
<tr>
<td></td>
<td>Red Cross</td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
<tr>
<td><strong>Match</strong></td>
<td>Cat</td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathlene</td>
</tr>
<tr>
<td></td>
<td>Red Cross</td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red Cross Representative</td>
</tr>
<tr>
<td><strong>Match wildcard</strong></td>
<td>Ca?</td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Car</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathlene</td>
</tr>
<tr>
<td></td>
<td>R*</td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red Cross Representative</td>
</tr>
<tr>
<td><strong>Equal</strong></td>
<td>Cat</td>
<td>Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cat Flower</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Big Cat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cathlene</td>
</tr>
<tr>
<td></td>
<td>Red Cross</td>
<td>Red Bull</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cross Roads</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Red fine Cross</td>
</tr>
</tbody>
</table>
Examples of filtering based on date responses:

**NOTE:** Text in red meets filter condition and is included in the report.

<table>
<thead>
<tr>
<th>Entry Types</th>
<th>Conditions</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to</td>
<td>23/06/2014</td>
<td>23/06/2014</td>
</tr>
<tr>
<td>Earlier than or equal to</td>
<td>23/06/2014</td>
<td>24/06/2014, 25/06/2014, 26/06/2014</td>
</tr>
<tr>
<td>Later than</td>
<td>23/06/2014</td>
<td>24/06/2014, 25/06/2014, 26/06/2014</td>
</tr>
<tr>
<td>Later than or equal to</td>
<td>23/06/2014</td>
<td>23/06/2014, 24/06/2014, 25/06/2014</td>
</tr>
<tr>
<td>Between</td>
<td>23/06/2013 and 23/06/2014</td>
<td>From 23/06/2013 to 23/06/2014</td>
</tr>
</tbody>
</table>
Examples of filtering based on numeric responses:

**NOTE:** Text in red meets filter condition and is included in the report.

<table>
<thead>
<tr>
<th>Entry Types</th>
<th>Conditions</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to</td>
<td>2456</td>
<td>2456</td>
</tr>
<tr>
<td>Greater than</td>
<td>2456</td>
<td>2457 2458 2459</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2455 2454 2453</td>
</tr>
<tr>
<td>Earlier than or equal to</td>
<td>2456</td>
<td>2453 2454 2455</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2457 2458 2459</td>
</tr>
<tr>
<td>Less than</td>
<td>2456</td>
<td>2453 2454 2455</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2457 2458 2459</td>
</tr>
<tr>
<td>Less than or equal to</td>
<td>2456</td>
<td>2456 2455 2454</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2457 2458 2459</td>
</tr>
<tr>
<td>Between</td>
<td>2456 and 2500</td>
<td>From 2456 to 2500</td>
</tr>
</tbody>
</table>
Filter Logic

You can use **AND** and **OR** filter logic simultaneously. To do so, you must apply customized logic and specify the way of combining filters.

**EXAMPLE:**

There are following questions in your survey:

1. **How old are you?**
   - 18 or younger
   - 19 to 40
   - 41 to 60
   - 60 and older

2. **Which state do you live in?**

   You may want to see survey results based on the respondents who live in California and who are 19 to 60 years old.
In this case, set following filters:

- **F1**: Filter type: Question; Question: How old are you?; Answer: 19 to 40
- **F2**: Filter type: Question; Question: How old are you?; Answer: 41 to 60
- **F3**: Filter type: Question; Question: Which state do you live in?; Include records: That, contain at least one word, California.
- **Select the Apply customized Logic** option and enter the following expression: 
  \( (F1 \text{ OR } F2) \text{ AND } F3 \)

**NOTE**: After saving the customized logic operators will be replaced with respective special symbols: || for OR and && for AND.

A report based on respondents who live in California and who are from 19 to 60 years old:

![Chart showing the age distribution of respondents and a note on the total number of respondents included and excluded from the report.]

Report also shows you the total number of respondents to the survey and number of respondents who was/were not included into the report.
Remote Filter

Remote filter is used to allow report viewer filter results right from the Summary Report. This flexible filtering tool allows email recipients to customize their own filters (for a report) without requiring the assistance of the person who conducted the survey.

1. Go to the Settings section.
2. Select Filter option.
3. Click Save to apply changes.
4. Click the Back button to go to the Edit Report page.
5. Click the Publish button to open this section.
6. Select the **Email report** option to email link to another person or just copy report URL and distribute it.

When report viewers open the **Summary Report** following the link you provided, they will be able to use filtering from their side.
Instructions on Report Filtering

You can provide instructions on how to apply survey results filtering, to the recipients that report link was emailed to.

1. Click the Add Filter button, in the Summary Report to add filters to the survey results.

2. Click the Add Filter button to add a filter.

3. Select the Filter Type to filter results by certain question, respondent's email or the date of submit.

4. Specify the Type of Search.

5. Apply Filter Logic, if more than one filter has been added.

6. Click Apply to apply the filters.

7. Click Back to return to the Summary Report.

8. Click Edit Filter to edit the applied filters.

NOTE:
- If you are inactive in the window for 30 minutes, the session times out.
• When the window closes, all the information on the added filters is lost.
• You can consult the Advanced Filter section of this manual for more details on report filtering.
**Custom Filters for Report URL**

Filters can be embedded directly into the report URL. Thus the report viewer will see only particular responses following such report link.

1. Go to the *Publish* section of the custom report.
2. Copy the report link, located in the Step 1.
3. Add filter logic to the end of the report link URL, by specifying parameters for your filters.
4. Insert the customized report URL in your website or send the link using other methods.

Here is an example of a customized report URL with parameters for filter logic and filters:

```
```

- The original report link is red – http://www.keysurvey.com/report/398581/383485/6cd2da08?afterVoting=473229c8eb3c
- The parameter used to initiate the filter logic is green – &LOGIC=
- The actual filter logic is purple – (F1 OR F2) AND F3

The LOGIC parameter describes filter logic. You can also use AND, OR and combined filter logics.

- LOGIC=F1 AND F2 means that you will see the report on those respondents who meet the conditions of all your filters.
- LOGIC=F1 OR F2 means that you will see the report on those respondents who meet the conditions of at least one of your filters.
- LOGIC=F1 OR (F2 AND F3 ) means that you will see the report on those respondents who meet the conditions of F1 or F2 and F3 filters.

**NOTE:** The same filter logic is used in the Advanced Filter, for additional details, see both the Advanced Filter and the Filter Logic sections of this manual.

This report URL contains a set of parameters describing filters. For example:

- F1 and F2 refer to the question that asks respondents their age.
- F3 refers to the question two that asks respondents state of living.

To filter text responses you can use [M], [C], [R] or [W] tokens.

- [M] – The responses that contain the exact text string indicated next to [M] in the report URL will be included in the report.
- [C] – The responses that contain all of the words indicated next to [C] in the report URL (regardless of their order) will be included in the report.
  
  **For example:**
  F3=[Q2][C]California = The responses that contain ‘California’ will be included in the report.
- [R] – The responses that match the regular expression indicated next to [R] in the report URL will be included in the report.
- [W] – The responses that match the wildcard indicated next to [W] in the report URL will be included in the report.
You can use the \[DS\] and \[DE\] tokens to specify **Start Date** and **End Date** for the filtering.

**For example:**

\[LOGIC=F1 AND F2&F1=[DS]2011-12-25&F2=[DE]2012-01-25\] = The report will contain only those responses that were received between the indicated dates

**NOTE:** For **Multi Line Text Response** question type you should specify both the question number and answer number as well.

**For example:** \[F1=[Q2.A1][C]comments\]

**Email Report**

One of the methods of report sharing is sending a report link via email.

1. Click the **Email Report** option from the **Report Information** pane on the **Reports Home** page.
2. You can also select this option from the **Report Publish** section and click **Next**.

3. Click **Edit Email** to compose your email message. For details consult the **Compose Email** section.
4. Select the report distribution method:
   - **Do not email report** option is the default option as is used to cancel report sending.
   - **Email link to report** emails link to the report inside the email along with your custom text.
   - **Display report inside email** displays the report directly inside the body of the email.

5. Select how often to email the report (Step 3):
   - **Email report now** – emails the report immediately.
   - **Email report every N days** – emails the report every N number of days.
   - **Email report on** – emails the report on a specific date.
   - **Email report every** – emails report each selected day of the week.
   - **Email report every N day of month** – emails report each N day of the month.
   - Select the **Email report if new respondents** option and indicate number of responses to email the report if new responses are received during a set time period. This means that if there are no new responses, report will not be emailed at all.

6. Add email addresses into the **Enter email addresses** field. Be sure to separate each address with a comma, semicolon or a new line.

7. Click **Email Report** if the **Email report now** option is selected or click **Apply** to save changes and schedule report sending.
Print Report

To convert your survey results to PDF format, for printing and distributing to the field follow these steps:

1. Select the **Print Report** from the **Report Information** pane on the **Reports Home** page.

2. Select the type of report (Step 1):
   - **Summary** converts the summary report to PDF.
   - **By respondent** option converts the report by each respondent.

3. If converting report by respondents, you can set the interval for respondents to include in the print.
version. You cannot create a by respondent PDF report for more than 500 respondents at a time.

4. Select the report format that can be color or black and white.

5. **Portrait** applies a portrait page orientation to your report.

6. **Landscape** applies a landscape page orientation to your report.

7. Click the **Convert To PDF** button.

**ADDITIONAL NOTES:**

- Setting up incorrect CSS parameters in the Edit CSS section of your custom report may damage the appearance of your report in the PDF format.
- When converting your report to the PDF format, all HTML tags used in the report survey are ignored.

**Export to Excel and CSV**

1. Select the **Export to Excel** or **CSV** option from the **Report Information** pane on the **Reports Home** page.

2. Select export options:
   - Select the **Export labels only** option to export the report with labels only.
   - Select the **Export values only** option to export the report with values only.
   - Select the **Export values and labels** option to export the report with both values and labels.
   - Select the **Include Unique Survey URL** option to export the unique survey URL of each respondent.
   - Select the **Include links to Reports By Respondent** option to export link to by respondent report of each respondent.
   - The **Show Respondent Overall** option is used to show respondents actual sequence numbers within...
the report. This option is commonly used if you filter responses but need to keep their real sequence numbers.

- Select the Export summary option to export summary report along with the survey’s response data per each respondent.

3. Click the Export To Excel button to export the report to Excel.
4. Click Open to open the document in Excel or click Save to save your file locally.

When exporting to Excel, data appears in the following order:

1. In case Export summary option is selected before exporting a report to Excel, XLS spreadsheet will contain Summary worksheet which displays overall information per each question and corresponds to online summary report.
2. **Results** worksheet contains all responses (respondent’s answers to all survey questions) that appear in separate rows.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Survey name</td>
<td>Filtering Results</td>
<td>Report title</td>
<td>Filtering Results</td>
</tr>
<tr>
<td>2</td>
<td>Survey description</td>
<td>Report introduction</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- First and second rows contain Survey/Report name and description accordingly.

**NOTE:** You can export reports to Excel that contain more than 256 columns; however, such reports are split into several Excel worksheets.

3. The sequence of columns is as follows:

- A: Overall Response #
- B: Submit date
- C: Unique URL
- D: Report by respondent
- E: Email/Password
- F: How old are you?
- G: Which State do you live in?
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Survey Reports

- 1st column: The respondent's sequence number.
- 2nd column: The date and time the survey was submitted.
- 3rd column: Respondent’s email address (if the survey was distributed via our email system and was not anonymous).
- Starting with the 4th column, the column sequence is the same as the order of questions and answer choices in the exported report.

4. The number of columns used for each question depends on the question type, number of answer choices, answer labels and values set (see next page).

5. Format of questions and columns is as follows:
   - **Multi-Line Text Response** – One column per question; the column contains response text.
   - **Single Line Text With Pre-Format Options and Numeric Allocation** – One column per answer field; each column contains corresponding response text or a numeric value.
   - **Compare One against another** – One column for each answer choice; the number in the column reflects how many times this answer choice has been selected.
   - **Rate Different Items Along The Scale Of Your Choice** – One column per answer choice.
   - **3D Matrix** – One column per answer choice; the heading of the column contains the matrix row and column names. For example: in the 'Goods - Prices' heading, 'Goods' is the name of the matrix row and 'Prices' is the name of the matrix column. The cells of 3D Matrix are exported according to their format:
     - **Pick One** – If the radio button is selected the column contains value or label of the selected item, otherwise it is empty.
     - **Check All That Apply** – If the check box is selected the column contains number ‘1’, otherwise it is empty.
     - **Dropdown Box** – If the answer is selected the column contains the order number of the selected answer, otherwise it is empty.
     - **General** – If the text field is filled the column contains the text, otherwise it is empty.
   - **Pick One or ‘Other’** and **Dropdown Box** – One column per answer; this column contains text of the selected answer choice.
   - **Check All That Apply** and **List Box** – One column per answer choice; if the answer choice is selected, the column contains text of the answer choice, otherwise it is empty.

**ADDITIONAL NOTES:**
• If your question contains ‘Other’ or ‘Comment’ field, a column is added to display the text responses.
• If you selected to set labels for answers, answer texts are replaced with the corresponding labels.
• If you selected to set values for statistics or decided to use the default ones, a column is added next to the answers to display the values.
• If you selected to set both labels for answers and values for statistics, answer text is replaced with the corresponding labels and a column is added to display the values.

**Export to SPSS**

1. Click the **Export to SPSS** option from the **Report Information** pane on the **Reports Home** page.

2. Select export options:
   - **Export to SPSS**
     - Export labels only
     - Export values only
     - Export values and labels
     - Export labels and values that toggle
   - **Encoding**
     - Default
     - Other
   - **Open in WorldAPP Analytics**
   - **Export to CSV**
• Select the Export labels only option to export the report with labels only.
• Select the Export values only option to export the report with values only.
• Select the Export values and labels option to export the report with both values and labels.
• The Show Respondent Overall option is used to show respondents’ actual sequence numbers within the report. This option is commonly used if you filter responses but need to keep their real sequence numbers.
• Support multiple response sets is applicable for the Export labels and values that toggle option and is commonly used to create multiple response sets for the multi-choice types of questions such as Check All and List Box. In this case responses will be exported in the following way:
  • Values – 1 for selected response, 0 for not selected.
  • Labels – Yes for selected response, No for not selected.
• Select the Default option to use the default encoding while exporting your report to SPSS.
• Select the Other option to open and choose the proper encoding, if your report contains data in any language other than English.

3. Click the Export To SPSS button to export your report to SPSS.
4. Click Open to open the document in SPSS or click Save to save your file locally in SPSS format (.sav).

When exporting to SPSS, data appears in the following order:

1. Each response (one respondents answers to all survey questions) appears in one row.
2. The sequence of columns is as follows:
   • 1st column: The respondent’s sequence number.
   • 2nd column: The date and time the survey was submitted.
   • 3rd column: Respondent’s email address (if the survey was distributed via our email system and was not anonymous).
   • Starting with the 4th column, the column sequence is the same as the order of questions and answer choices in the exported report.

   NOTE: If you click the Data View tab, you see answers to the questions with the questions represented as variables. If you click the Variable view tab, you see questions and full information about variables.

3. The number of columns used for each question depends on the question type, number of answer choices, answer labels and values set (see next page).
4. Format of questions and columns is as follows:
   • Multi-Line Text Response – One column per question; the column contains response text.
   • Single Line Text With Pre-Format Options and Numeric Allocation – One column per answer field; each column contains corresponding response text or a numeric value.
   • Compare One Against Another – One column for each answer choice; the number in the column reflects how many times this answer choice has been selected.
   • Rate Different Items Along The Scale Of Your Choice – One column per answer choice; the number
in the column is the order number of the selected rank in the rating scale.

- **3D Matrix** – One column per answer choice; the heading of the column contains variables Q, A, S with numbers; Q refers to the number of survey question, A and S are used to identify the matrix row and column numbers correspondingly. For example, Q1.A2.S3 refers to the answer in the survey question N 1, in the matrix row N 2 and in the matrix column N 3. The cells of 3D Matrix are exported according to their format:
  - **Pick One** – If the radio button is selected the column contains number ‘1’, otherwise it is empty.
  - **Check All That Apply** – If the check box is selected the column contains number ‘1’, otherwise it is empty.
  - **Dropdown Box** – If the answer is selected the column contains the order number of the selected answer, otherwise it is empty.
  - **General** – If the text field is filled the column contains the text, otherwise it is empty.

- **Pick One or ‘Other’ and Dropdown Box** – One column per answer; this column contains text of the selected answer choice.
- **Check All That Apply and List Box** – One column per answer choice; if the answer choice is selected, the column contains text of the answer choice, otherwise it is empty.

**ADDITIONAL NOTES:**

- If your question contains an ‘Other’ or ‘Comment field, a column is added to display the text responses.
- If you selected to set labels for answers, answer texts are replaced with the corresponding labels.
- If you selected to set values for statistics or decided to use the default ones, a column is added next to the answers to display the values.
- If you selected to set both labels for answers and values for statistics, answer text is replaced with the corresponding labels and a column is added to display the values.

**Xml Export**

The XML Export feature allows you to export the data of one or more surveys simultaneously and their responses into XML and XSD formats. These will help you to retrieve the information from your surveys data and use it either as a file in your computer or directly from a browser window.

To export survey and survey responses follow these steps:

1. Click the **Reports** button from the main navigation menu.
2. Click the **XML Export** option from the navigation sub-menu.
3. Select the survey you wish to export to XML. Hold down the **CTRL** key and mouse-click to select multiple surveys.
4. Use the right and left arrow buttons to add or remove surveys for export.

5. The **Survey Structure** option exports the survey data only (without responses).

6. The **Responses** option exports responses along with the survey data. When you select this option, the Response type menu appears.
7. Click the **Completes only** option to export only completed survey responses.
8. Click the **Completes and partially completed** option button to export both completed and 'In Progress' survey responses.
9. Click the **Export** button to export to XML.
10. In the dialog box click **Open** to open .ZIP archive or click **Save** a to save it locally. The archive contains XML and XSD files. File that contains responses includes the following parameters:
    - Submit Date and Time;
    - Email Address (if available);
    - Respondent ID;
    - Analysis Code (if your subscription plan includes the corresponding feature).

You can also export responses for the selected report when publishing results:

1. Click the **Export to XML** option from the **Report Information** pane on the **Reports Home** page.

2. Click the Export to XML button at the bottom of the page to save results in XML and XSD formats.

**Upload to FTP**

You can schedule synchronization of survey results with the FTP server.

1. Click the **Publish** button from the **Report Information** pane on the **Reports Home** page.
2. Click the **New FTP Upload** button at the bottom of the *Report Publish*.

![Schedule FTP upload](image1)

3. Select the format to convert report results before the upload. Please refer to appropriate sub-sections earlier in this chapter for detailed information on export methods and formats.

4. Click the **Next** button.

5. Indicate FTP server settings such as FTP path, login credentials file name template.

![Schedule FTP upload](image2)

6. Click **Next** to proceed.
7. Setup schedule settings: when the upload should take place, Recurrence pattern and others.

8. Click **Finish** to save changes and schedule FTP upload.

**Statistical Reporting**

Statistical quantities allows you to estimate trends in the survey results more precisely.

1. To apply statistical quantities to the question edit the custom report and click the **Edit** button next to one of the questions on the **Edit Report** page.
2. Click the **Statistics** button.

3. Select the statistical quantities to be calculated for the selected question. For more details, see the **List of Statistical Quantities** section of this manual.

4. Select the **Show averages in summary report** and **Show Graph** options to display an average score for each rated object and display graphs – this option is available for the **Rate Different Items Along the Scale of Your Choice** question type only.

5. Click **Save** to save your changes and apply statistics to your report.

6. Click **Back** to return to the **Edit Report** page.

This is how the Summary Report with the statistics activated will look like:
Statistical Quantities Calculation

This sub-section describes how statistical quantities are calculated for all question types in the report.

Calculation Rules

For all question types in the Summary Report statistical calculations are made for a row consisting of the values taken, as many times as there are responses to each answer. By default, the values are set to the answers accordingly to their sequence number (1, 2, 3 and so on).

For Example: Sum for the question shown above will be calculated as follows: $\text{Sum} = 1 \times 1 + 2 \times 5 + 3 \times 5 + 4 \times 1 = 30$

NOTE: The calculation of statistical quantities in Single Line Text with Pre-Format Option, Numeric Allocation, Rate Different Items Along the Scale of Your Choice question types has some peculiarities.

• **Single Line Text with Pre-Format Options**
  For this question type, the calculation is made for the row consisting of the values taken as many times as there are responses to each answer and for the row of numbers entered in the responses if the numeric format has been set as well.

• **Numeric Allocation**
  For this question type, the calculation is made for the row consisting of the values taken as many times as there are responses to each answer and for the row of numbers entered in the responses. If more than five statistical quantities have been selected, the first five columns for each response and the “more” link are displayed. Click this link to see the calculation for all the quantities.

• **Rate Different Items Along the Scale of Your Choice**
  To view the statistics for this question type, you need to click the View button in a Summary Report mode. A detailed report displays (this question is divided into the ‘Pick one’ questions). The statistics are calculated for each of the ‘Pick one’ questions separately.
## List of Statistical Quantities

<table>
<thead>
<tr>
<th>Statistical Quantities</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sum</td>
<td>Returns the sum of all values.</td>
</tr>
<tr>
<td>SumOfSquares</td>
<td>Returns the sum of the squares of the values.</td>
</tr>
<tr>
<td>Min</td>
<td>Returns the minimum of the values.</td>
</tr>
<tr>
<td>Max</td>
<td>Returns the maximum of the values.</td>
</tr>
<tr>
<td>Mean</td>
<td>Returns the arithmetic mean of the values.</td>
</tr>
<tr>
<td>RMS</td>
<td>Returns the Root Mean Square of the values.</td>
</tr>
<tr>
<td>Variance</td>
<td>Returns the variance based on the values.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>Returns the standard deviation based on the values.</td>
</tr>
<tr>
<td>Standard error</td>
<td>Returns the standard error based on the values.</td>
</tr>
<tr>
<td>Geometric mean</td>
<td>Returns the geometric mean of the values.</td>
</tr>
<tr>
<td>Product</td>
<td>Returns the product of the values.</td>
</tr>
<tr>
<td>Harmonic mean</td>
<td>Returns the harmonic mean of the values.</td>
</tr>
<tr>
<td>Sum of inversions</td>
<td>Returns the sum of inversions of the values.</td>
</tr>
<tr>
<td>Skew</td>
<td>Returns the skew of the values.</td>
</tr>
<tr>
<td>Kurtosis</td>
<td>Returns the kurtosis of the values.</td>
</tr>
<tr>
<td>Sum of powers(3)</td>
<td>Returns the sum of cubes of the values.</td>
</tr>
<tr>
<td>Sum of powers(4)</td>
<td>Returns the sum of fourth powers of the values.</td>
</tr>
<tr>
<td>Sum of powers(5)</td>
<td>Returns the sum of fifth powers of the values.</td>
</tr>
<tr>
<td>Sum of powers(6)</td>
<td>Returns the sum of sixth powers of the values.</td>
</tr>
<tr>
<td>Moment(0,0)</td>
<td>Returns the moment of 0th order with value 0.</td>
</tr>
<tr>
<td>Moment(1,0)</td>
<td>Returns the moment of 1st order with value 0.</td>
</tr>
<tr>
<td>Moment(2,0)</td>
<td>Returns the moment of 2nd order with value 0.</td>
</tr>
<tr>
<td>Moment(3,0)</td>
<td>Returns the moment of 3rd order with value 0.</td>
</tr>
<tr>
<td>Moment(4,0)</td>
<td>Returns the moment of 4th order with value 0.</td>
</tr>
<tr>
<td>Moment(5,0)</td>
<td>Returns the moment of 5th order with value 0.</td>
</tr>
<tr>
<td>Moment(6,0)</td>
<td>Returns the moment of 6th order with value 0.</td>
</tr>
<tr>
<td>Moment(0,mean())</td>
<td>Returns the moment of 0th order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(1,mean())</td>
<td>Returns the moment of 1st order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(2,mean())</td>
<td>Returns the moment of 2nd order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(3,mean())</td>
<td>Returns the moment of 3rd order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(4,mean())</td>
<td>Returns the moment of 4th order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(5,mean())</td>
<td>Returns the moment of 5th order with the arithmetic mean value.</td>
</tr>
<tr>
<td>Moment(6,mean())</td>
<td>Returns the moment of 6th order with the arithmetic mean value.</td>
</tr>
<tr>
<td>25%, 50%, 75% Quantiles</td>
<td>Returns the exact quantiles of the specified percentages.</td>
</tr>
<tr>
<td>quantileInverse(median)</td>
<td>Returns exactly how many percent of the elements contained in the receiver (more or equals median).</td>
</tr>
</tbody>
</table>
Time Series

Time Series builds response statistics for a set period of time, with a selected interval and shows it as a graph. Use this feature to production or consumption of similar goods during a specified time frame.

1. To apply statistical quantities to the question edit the custom report and click the Edit button next to one of the questions on the Edit Report page.

2. Click the Time Series button.

![Diagram of Time Series feature in WorldAPP software](image)
3. Indicate time period to build statistics on. You can set interval to year, quarter, month, week or single day. Use **Step** to set the interval spacing. For example if you select a time period of 1 month, an interval of ‘week’ and a step of 2, then you will have 2 intervals, each 2 weeks long.

4. Analysis can be made on respondents amounts to design tables and graphs accordingly to the total number of respondents for each answer choice of the question or response values to design tables and graphs accordingly to the values assigned to the responses multiplied by the total number of respondents for each answer choice of the question.

5. You can display both table and graph.

6. To customize graph settings click the **Edit Graph** button. For more details see the Time Series Graph subsection.

7. Click **Save** to save your settings.

8. Click **Preview** to see how your time series graph or table looks like.

**Time Series Graph**

Use this option for editing graph name, axis captions, setting graph type, size, etc.

1. Click the **Edit Graph** button on the **Time Series** edit page.

2. Enter a title for your graph in the Name graph text box (Step 1).
3. Select the graph type and indicate its size.
   
   **NOTE:** The graph width should be at least 100 and no more than 2000 pixels; the graph height should be at least 200 and no more than 2000 pixels.

4. Select what scale to use:
   - Select **totals** to scale the graph in units corresponding to the total amount of respondents.
   - Select **percent** to scale the graph in percent.

5. Select the **Show legend in graph** option to view the labels of the answer choices or rated objects in the time series graph. Select the **Do not show legend** option in order to hide the legend.

6. You can provide custom names for axis instead of the default.

7. Click **Save** to save your settings.

8. Click **Preview** to see how your time series graph looks like.
Example of Time Series with table and graph preview:

### Time Series

<table>
<thead>
<tr>
<th>Time Interval</th>
<th>Under 18</th>
<th>10-40</th>
<th>41-60</th>
<th>More than 60</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Nov 2011 - 22 Nov 2011</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>22 Nov 2011 - 23 Dec 2011</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>23 Dec 2011 - 03 Jan 2012</td>
<td>1</td>
<td>5</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>03 Jan 2012 - 24 Jan 2012</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>24 Jan 2012 - 01 Feb 2012</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Total # of respondents: 12.

Statistics based on 12 respondents.

0 filtered
0 dropped
V – CREATING 360 SURVEY

Creating a 360 survey is similar to creating a regular survey, though there are some significant differences that will be described in the current section.

Designing a 360 Survey From Scratch

Generally designing a 360 survey from scratch procedure consists of the following steps:

- Naming a 360 Survey
- Adding 360 Survey Subjects
- Adding 360 Survey Questions
- Customizing 360 Survey Layout
- 360 Survey Rules
- Testing a 360 Survey
- Adding 360 Survey Participants
Creating 360 Survey

Step 1 – Naming a 360 Survey

1. Click the **New Survey** button at the top on the **Home** page.

2. Click the **From Scratch** option for the **360 Survey** section.

3. Provide survey name, title, introduction and internal notes.

4. **Survey Name** is a mandatory field and you must use unique name for each new survey.

5. Input title for your survey which will be displayed to survey participants. You can leave this field blank, thus the **Survey Name** will be used instead.

6. Input survey introduction if necessary. This may be instructions on how to fill a survey, purpose of the evaluation.

7. Input survey internal notes if necessary. They will not be displayed to participants.

8. Save your changes.
Step 2 – Adding 360 Survey Subjects

1. Choose the Contact Manager you wish to use.

2. Click the Select Contacts button.

3. You can add subjects from a shared list or just select them from the Contact Manager directly. Select appropriate option and click Next.

4. If filtering contacts from the Contact Manager, select the group of contacts from the Groups Pane in the left, then select appropriate contacts and click the Add Selected Contacts button. Click Add Entire Group to add all contacts in this group.

5. Created list of subjects is now attached to your 360 Survey. You can update this list from time to time by checking whether there are new contacts have been added to the Contact Manager. Click the Update List button for that.
6. List of subjects can be shared and used in other 360 surveys. Click the **List Properties** button.

   ![List Properties](image)

   **List name**
   
   360 Employee Evaluation- Subject List

   **List contact information**
   
   Marketing

   **Notes regarding this list**
   
   This list is used in Employee Self-Evaluation surveys.

   **Filter criteria for this list**
   
   Department in {Marketing}

   **List sharing**
   
   - Shared
   - Not Shared

7. Name the list, provide any contact information and notes if necessary.

8. Select the Shared option to make the list available for other 360 Surveys.

9. Click **Save** to save changes and go back to the **Subject Manager** page.

10. Click the **Back** button to go back to the survey **Subjects** page.

11. If you need to change the default [Name] format select **Create New Format**. Using this format subjects and participants will be displayed in the 360 Surveys.

12. When participants open their surveys, subjects can be displayed in ascending or descending alphabetical order, as well as grouped or sorted by any column of the Contact Manager. For that use both **Group Subjects** and **Sort Subjects** options.

13. **Suppress subject if it is also a participant** options allow to avoid the situation when respondents can rate themselves. If this option is checked, respondents would not see themselves in the subjects list.
14. You can also **Limit Subjects** your participants can rate by specifying the minimum and maximum subjects numbers in respective fields under the step #6.

15. Decide how the subjects will appear:
   - **All on the Same Page** – subjects will be displayed one after another all on the same page.
   - **New Page** – each subject will be placed on a new page.
   - **Matrix View** – subjects and related questions will appear as a matrix: subjects as rows and related questions as columns. For long subjects list select the **Freeze Matrix Header and Footer** option for convenient survey appearance.

   **NOTE:** it is not recommended to use this option if your 360 survey contains **Rate Different Items** or **3D Matrix** types of question.

   - The **Add Clear Button** option adds a button to the survey, so participants reset their answers if necessary.
   - If rating all subjects is not mandatory, you can allow your survey participants select only appropriate subjects from the list. For that use the **Allow Participants to Select Subjects** option. You can apply check boxes or list box, which is commonly used for long subjects list.

16. **Filter Subjects Based on the Participant Information** – this option is used to filter subjects list depending on particular participant.

17. Click the **Next** button to move to the next step.
Step 3 – Adding 360 Survey Questions

Adding questions to a 360 Survey is the same as adding questions to regular survey. For more details and question types list see the Creating a Survey chapter of this manual.

1. Click the Insert button and select the New Question option from the dropdown menu or click respective button on the ribbon toolbar to add a new question to your survey.

2. Select type of question you want to add and provide all necessary information. For more details consult the Survey Question Types subsection of this manual.

3. When you add a question to your 360 survey it is applied to each of survey subjects and is displayed as many times as many subjects your survey has – this means that when participants answer such questions they rate subjects. If you need to add a question that is not related with subjects rating, select the General option next to the appropriate question on the Edit Survey page.
In the following example survey the first question is in general section and does not refer to any subject, the second question is not in general section and requires rating each of the listed subject:

4. Click the Layout button when done with questions creation and other settings.

Step 4 – Customizing 360 Survey Layout

This step has the same options and instructions as for the regular surveys. Consult the Customizing Your Survey Design sub-section for more information.
Step 5 – 360 Survey Settings

Survey settings define the behavior of your 360 survey during the voting process.

1. 360 survey participants can submit their surveys and then come back later, thus you can define survey behavior:
   - Do not allow respondent back into survey – this option does not allow participants coming back to their surveys for the second time and change answers after submit.
   - Respondent may return and modify their response – this option allows participants coming back to their survey and change answers at any time.

2. When participants filling out their surveys, they may meet alert messages in case of incorrect answers or actions. You can customize those alert messages depending on the survey audience and show them in appropriate languages. For that use the Display alert messages in option.

3. Add the survey metadata if necessary. It is used for internal purposes only and is not available to survey participants.

4. Click Save to apply changes made.

5. Click Cancel to get back to the Edit Survey page.
Step 6 – Testing 360 Survey

This design step is the same as for the regular surveys. Consult the Testing your Survey sub-section for more information.

Step 7 – Adding 360 Survey Participants and Launch Settings

Now when your 360 Survey contains questions and subjects to rate, you will need to add survey participants before the distribution.

1. Click the Launch button on the ribbon toolbar of your 360 survey.

   1. Select link type
      - Key survey URL
      - IP address
      - Customize URL
   
      Select the checkbox for secure communications
      - Secure connection

   2. Master survey URL. You may copy and paste the URL below:
      - http://www.keysurvey.com/f/455471/24de/

   3. Show on Portal page 2012-09-05 7 AM EST
      - Hide on Portal page 2012-10-06 7 AM EST
      - Start Survey 2012-09-05 7 AM EST
      - End Survey 2012-10-06 7 AM EST
      - End Survey When the completed number equals no limit
      - Send expire alert
      - Send survey completed alert

   4. Select survey distribution method and click 'Go'

2. Select the link type for your survey. This will not affect your survey, just the link appearance.
   Use the Secure Connection option to enable SSL data encryption.

3. The master survey URL is a general link that can be passed to survey participants directly using your own means of communication.

4. Select dates when your survey should be available for participants on the Portal page and dates of survey activeness.

5. Before your survey is closed for participation you can be notified via email to extend participation if necessary. Select the Send expire alert option and customize your notification message. Email will be sent to the address associated with your account one week before the survey expires.

6. If you want to be notified when a participant completes your survey, select the Send survey completed
alert option and customize notification message. Email will be sent to the address associated with your account.

7. Click the Go button to add and manage survey participants. This step is similar to the adding survey subjects. Just click the Add Participants button and select the appropriate participants from the list.
360 Survey Subjects and Participants

Subject and Participant Managers are storages for your 360 survey subjects and participants. From here you can manage both lists, save them for the future use and export to third-party applications.

To access a Subject Manager click the Subjects button on the ribbon toolbar of your 360 survey and click the Select Contacts button.

To access a Participant Manager click the Go button next to the Manage Participants option from the survey Launch section.

When you add subjects or participants to your 360 survey for the first time, you can add them from the shared lists or by filtering them from the Contact Manager.

For easier access to both Subject and Participant Managers you can switch between them by selecting the appropriate option.
NOTE:
this option is available only if both subjects and participants have been added to your 360 survey.

1. To delete contact from the list, select appropriate contact and click the **Delete Selected** button.

2. You can export subject and participant lists to **Excel** or **CSV** if necessary. Just click the **Export** button at the bottom.

3. Both subject and participant lists can be kept up to date by comparing records with the Contact Manager. Click the **Update List** button to check if there are any deleted contacts within the current list or in the Contact Manager and delete those that are missed in one of the mentioned lists.

4. When you have added appropriate contacts to the subject or participant list, you can save these lists for the future use within other 360 surveys. Click the **List Properties** button and share the list.
Participant Manager Controls

Unlike the Subject Manager, the Participant Manager contains additional controls for managing 360 survey participants:

- **Status** – shows contact’s participation status, which can be Not Started, In Progress or Completed.
- **Progress** – shows the completion progress by each participant in percents.
- **Start and End Dates** – shows period of time in which the participant can complete the survey.
- Click the **Set Date** link to specify the survey’s active dates for this participant. This option allows you to increase or decrease the survey period for particular participants regardless of the survey and portal activeness period.
- The **Reset** link resets participants participation dates to the survey’s activeness dates.
VI – 360 SURVEY DISTRIBUTION

- Survey Groups
- Participant Portal
- Invitation Distribution
- Survey Statistics
Survey Groups

Survey groups are used if you conduct multiple 360 surveys that are closely related for the same participants and to display all these surveys within the Participant Portal.

1. To create new group of surveys click the Survey Groups link from the Home page.

2. Click the Add New Group button.

3. Give a unique name to the new group.

4. Select surveys you want to organize into current group and click the Add button.

5. Before creating a group, you can customize survey title and survey position within this group. From the list of selected surveys in the right box select a survey and click appropriate button:
6. Click the **Save** button to create new group of 360 surveys.

7. Click **Back** to return to the **Survey Groups** page.

Survey groups are displayed as a table with the following columns:

- **Name** of the group and name of surveys within this group. Survey names are hyperlinked and lead to the **Edit Survey** page.
- **Participants** – shows the hyperlinked number of participants added for each survey and leads to the survey **Participant Manager**.
- **Subjects** – shows the hyperlinked number of survey subjects and leads to the survey **Subject Manager**.
- **Start Date, End Date** – these columns show dates when a survey is active and is opened for submission.
- All other columns represent survey metadata for internal use. If no metadata has been set, there will
be no additional columns.

When participants go to one of the surveys from the group, all other surveys will be listed as tabs on the Participant Portal.
Participant Portal

Participant Portal is a workspace within your account where you can access your 360 surveys if you appear to be a participant, but the Portal has to be set up first. For more information see the Participant Portal subsection in the Account Setup section of this manual.

In this section you will learn about the controls and how your survey participants see the Participant Portal.

1. Click the Portal button at the very top of your account and navigate to the Participant Portal in the submenu.

- **Survey** – lists surveys and survey groups you display to participants. To participate in a survey, click its name.
- **Survey Period** – displays the period during which the survey is opened for participation and can be submitted.
- **Your Survey Status** – indicates participant status for the associated survey.
- **Your Progress** – shows you the percentage and the number of subjects completed per survey. (M of N) means that participant rated M subjects for the survey from the total number of N subjects.
- **Export to Excel** – allows participant to convert 360 survey responses to Excel file.
• All other table columns represent survey metadata which can be set on the survey Settings page.
• If you do not appear to be a participant in the created 360 Surveys, but need to participate on behalf on other person click the **Impersonate** button.
• Input unique participant’s ID and submit surveys on behalf of a particular participant.
Invitation Distribution

When you are ready to distribute your 360 surveys to the participants go to the Portal page, where you can create email campaigns, send invitation emails, send email reminders and view statistics per all distributions.

Email Campaigns

Email campaigns are used to select certain participants, compose and send invitation email to those participants, as well as send reminder emails if necessary.

1. Click the Invitation Distribution link from the navigation sub-menu.

2. Click the Create Campaign button.

3. Name new campaign and provide internal notes if any.

4. Click Save.

5. You can create as many campaigns as necessary and then track your distributions at any time.
6. To add participants to the email campaign click its hyperlinked name and then select surveys to add participants from.

Now you are ready to select participants, compose your invitation message and send it to selected participants.
Send Campaign Emails

1. To compose invitation message and send emails to 360 survey participants, select the participants from the list and click the **Edit And Send Email** button.

   ![Send Invitation Screen](image)

   - **Select Surveys:**
   - **Send Invitation:**
   - **1st Reminder**
   - **Additional Reminder**
   - **Send email notification**
   - **Edit And Send Email**

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Survey Name</th>
<th>Send On</th>
<th>Last Reminded</th>
<th>Scheduled Reminder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexander Harris</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Angel Turner</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anthony Anderson</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daniel Miller</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dylan Martinez</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Isolah Phillips</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jorden Roberts</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jese Young</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logan Allen</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luke Perez</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Noah Hernandez</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zachary Hall</td>
<td>360 Employee Evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Click the **Edit Email** button to compose campaign invitation message. For more details consult the **Compose Email** sub-section in the **Distributing Regular Survey** section of this manual.

3. Verify participants’ email addresses to check if emails you are going to send invitations to are correct. Email will be checked for syntax and domain names validity.

4. To stress on the email importance change the priority and if necessary request return receipts.

5. When done, click the **Send Emails** button.

**NOTE:**
you can send invitation email to each participant only once within a campaign.
Use the **Email Campaign Reminder** to notify participants who never started or never submitted your 360 survey. To send new emails create new **Email Campaign** and follow the steps described above.
Email Campaign Reminder

Email reminder is an option used to remind those who have not opened or have not submitted your 360 survey yet.

1. Click a hyperlinked campaign name to open appropriate campaign.

2. Click the Email 1st Reminder or the Additional Reminder button if the first reminder has already been sent.
3. Select participants you want to remind and click the **Edit and Send Email** button.

4. Edit the reminder email by clicking the **Edit Email** button. For more information on composing email, see the **Compose Email** subsection of this manual.

5. Adjust when your campaign reminder should be sent:
   - Email reminder today.
   - Set a reminder to go every Nth day after the first invitation if you need to remind participants from time to time.
   - Select a particular date in the future when reminder should be sent.

6. Set the email priority if necessary.

7. Click the **Save** button to save changes and schedule a reminder.

**Survey Statistics**

To track 360 surveys' submission results go to the **Survey Statistics** page. Here you can see information per each particular survey: the number of subjects and participants, participation progress and other.

1. Click the **Portal** button from the main navigation menu at the top of your account. Then go to the **Survey Statistics** sub-menu item.

2. Click the **Select Surveys** button to choose surveys you want to see the statistics for or to remove particular surveys from the statistics page, then click **Save**.
• **Survey Name** – This column is hyperlinked and lead to the Participation Report for each survey.

• **Subjects** – shows total number of subjects per each 360 survey. Click it to go to the Subject Manager of the 360 survey.

• **Participants** – shows total number of 360 survey participants and details per each category. Click it to go to the Participant Manager of the 360 survey.

• **Start Date, End Date** – show survey activeness dates.

• **Shown on Portal** – indicates whether a 360 survey is available on the Participant Portal and available for submission.

3. Survey statistics can be exported to Excel or PDF if necessary. You can find these two option at the bottom of the survey statistics table.

4. To filter statistics by survey activeness or by its availability on the Participants Portal use one of the option in the top right: Show Active and Show Visible Surveys.
VII – 360 SURVEY REPORT

This section will walk you through the utilizing 360 Survey Reports functionality, which includes participation reports and 360 survey reports.

Participation Reports

Participation reports are used to get detailed participation data per each 360 survey. Go to the Reports section of your account and click Participation Reports from the navigation sub-menu.
**Standard Participation Report**

By default there is one participation report with standard settings that is created automatically and is called **Standard Report**. This report shows you the whole participation information per each participants of a selected 360 Survey. You can use this report for participation data analysis as well as create custom report from it.

Click the magnifier icon next to the **Standard Report** to preview it. Click the **Select Surveys** button to select surveys for which you want to see the participation information.

<table>
<thead>
<tr>
<th>Participant Name</th>
<th>Associated Surveys</th>
<th>Status</th>
<th>Total</th>
<th>Rated (100%)</th>
<th>Not Rated (0%)</th>
<th>Started</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support WorldAPP</td>
<td>360 Manager Self-Evaluation</td>
<td>Completed</td>
<td>1</td>
<td>1 (100%)</td>
<td>0 (0%)</td>
<td>2011-12-18</td>
<td>2011-12-18</td>
</tr>
<tr>
<td></td>
<td>360 Employee Self-Evaluation</td>
<td>In Progress</td>
<td>1</td>
<td>1 (100%)</td>
<td>0 (0%)</td>
<td>2011-12-18</td>
<td>2011-12-18</td>
</tr>
<tr>
<td>William Hanney</td>
<td>360 Manager Self-Evaluation</td>
<td>Completed</td>
<td>1</td>
<td>1 (100%)</td>
<td>0 (0%)</td>
<td>2011-12-18</td>
<td>2011-12-18</td>
</tr>
<tr>
<td></td>
<td>360 Employee Self-Evaluation</td>
<td>Completed</td>
<td>1</td>
<td>1 (100%)</td>
<td>0 (0%)</td>
<td>2011-12-18</td>
<td>2011-12-18</td>
</tr>
</tbody>
</table>

Participation report contains the following columns and participation information:

- **Participant Name** – this column shows participants’ names that corresponds to the **Name Format** that can be set for each 360 survey separately on the **Subjects** section.
- **Associated Surveys** – contains list of surveys that participant is invited to participate in.
- **Status** – indicates participant’s status within each selected survey. Participants who never opened their surveys are marked as Not Started. Those who filled out partially or at least opened their surveys are marked as In Progress. If participants clicked Submit, they consider as Completed.
- **Total** column shows number of subjects each participant must rate.
- **Rated** and **Not Rated** – number of subjects already rated and left to rate accordingly.
- **Started** – shows the date when participant opened a survey for the first time.
- **Last Updated** – this column shows the date of a last participant’s actions that were saved. This may be survey submission, changing answers or just saving a survey.
- To add more participants from the different surveys or to remove participants of the selected survey, click the **Select Surveys** button.
- You can export participation data to Excel by clicking the **Export to Excel** button or to PDF file by clicking the **Print to PDF** button at the top when previewing report.
- In some columns data can be sorted in alphabetical order ascendingly or descendingly.
- To filter participation data by participant or survey name use the **Search** option. Input a search criteria and report data will be filtered out automatically. Click the **Reset** button to delete filter.
Custom Participation Report

Custom Reports are used to customize the look and feel of the participation report. They can be copied from the Standard Report or from another Custom Report.

Step 1 – Name Participation Report

1. Select the custom report you want to copy and click the Copy button on the top or click on New Report button and pick the report you would like to create this one from.

2. Give a unique name to the custom participation report.

3. Provide report title, introduction text and internal notes if necessary.

4. Click Save and Next to go to the next page.

Step II – Participation Report Columns

On the Columns page of the new custom participation report you can setup report data appearance, as well as filter this data.

Before customizing report data, select the surveys you want to see the participation data for by clicking the Select Surveys button.
The default columns are the same as in the Standard Participation Report. To add more columns click the **Add New Column** dropdown menu and select appropriate data:

**Participant Property** allows you to add any participant information from the Contact Manager.

**Survey Property** allows you to add data associated with the survey: name, title, group if survey is in a group of surveys, internal notes, metadata if any, start and end dates of the survey’s active period.

Survey properties and/or participant properties labels can be customized without affecting real survey data or participant records in the Contact Manager. You can do this when adding new column or by editing existing report columns.
The **Online Filter** option allows the report viewer to search and filter participation report by particular records.

- **Text Search** type of online filter allows report viewer to type in keyword. Report will be filtered by that keyword.
- The **Dropdown box** filter will list all available column items, selecting one of which will filter out participation report by that record.

**Status of Participant** – this column shows status of each participant. You can allow report viewer to filter report by the status using the ‘Online Filter’ option as well as sort records. Built-in color picker allows you to apply appropriate color to this column depending on the participant status.

**Subjects Total, Subjects Rated, Subjects not Rated** – shows the total number of subjects each participant has to rate, number of subjects already rated and number of subjects that are still unrated. If you want to mark out particular participants depending on the number of subjects they have to rate or they have already rated, you can color their records with appropriate colors. Indicate the higher and lower bounds and pick colors.

**Date Started, Date Completed, Date Last Updated** – these columns show participation dates when the survey was started, completed and last updated accordingly. You can customize columns labels and allow the report viewer using online sorting.
To remove columns from the custom participation report, select the appropriate column and click the **Delete Columns** button.

When you select surveys, your custom participation report includes all 360 survey participants. To filter your report and include only certain participants follow these steps:

1. Click the **Select Participants** button.
2. Click **New Filter** to add new filter.
3. Select the column you want to filter participants by.
4. Decide whether to include participants that match entered keyword or inversely.
5. Then select appropriate participants and click the **Add** button.
6. Click **Save** to save changes and apply the filter.

You can add as many filters as you need, then apply appropriate logic rule for filters to work correctly. You can use the **AND** or **OR** logic operators to create custom complex expressions.

Filtering participants is very similar to the filtering contacts when creating new group of contacts. For more details see the **Contact Groups** sub-section within the **Administration** section.

7. When you are done click **Back**.

There are two more filters available for the custom participation report.
Filter by Status filters report by the participants status, thus report will include participants of the selected statuses only:

Filter by Date filters participants by date of survey submission. Indicate the time period during which participants opened or last updated the survey.
Along with the online sorting you can group participation report records with up to four records in depth. For that click the **Group Records** button. Select a column you want to group report and grouping order.

Click the **Add Logo** button to add logo image at the top of your participation report. For more details consult the *Adding and Previewing a Survey Logo* sub-section of this manual.

Here is an example of custom participation report:
Step III – Participation Report Layout

On the *Report Layout* section you can customize the look and feel of your custom participation report so it looks attractive or corresponds to your corporate colors.

Select the report element you want to customize from the left pane. Then apply changes to the report font, background, text alignment and others.

You can also edit report CSS. For more details consult the *CSS Parameters* subsection of this manual.
**Step IV – Participation Report Settings**

On the participation report *Settings* page define general report behavior.

- **Show link to individual responses** – this option opens access to individual responses. Number of rated subjects appears as hyperlinked and redirects to the certain participant individual answers if clicked.
- **Show navigation** – this option displays navigation controls within the individual report, thus a report viewer can navigate between participants individual reports.
- **Show grouped surveys** – select this option to display participation data per all 360 surveys that are within the group with the selected survey. For more details consult the *Survey Groups* subsection of this manual.
- **Allow to select surveys** – this option activates the *Select Surveys* button in the participation report and allows report viewers to select surveys they want to see participation data for.
- **Export to Excel option** – activates the *Export to Excel* button that allows a report viewer to export participation data to Excel.
- **Print to PDF** – this option allows a report viewer to create a hard copy of the participation report.
Step V – Participation Report Publish Options

Report publish options gives you an ability to share your participation report with a third parties by emailing link to report, as well as exporting data to Excel, CSV, SPSS or PDF.

1. **Report link**
   - **Default**
   - **Other**

   You may copy and paste the **URL** below:

2. **Report status**
   - **Public report**
   - **Private report**
   - Custom note

3. **Access restrictions**
   - Enable access restrictions
   - Type in the password for report viewer
   - Type in the unique IDs of contacts you want this report to be accessible for:

4. **Publish options**
   - **Email report**
   - **Print report**
   - **Export to Excel**
     - Export labels only
     - Export values only
     - Export values and labels
   - **Export to CSV**

5. **Export to Excel**

6. **New FTP upload**

The **Report Link** option gives you an ability to change link to your participation report:

- **Keysurvey URL** – is a default link with the Key Survey domain name.
- **IP Address** – link that shows Key Survey's IP address instead of the domain name.
- **Customize URL** – this option allows you to mask Key Survey domain with the different domain name. This could be your company's domain for instance. For more details consult the ‘Customize URL’ subsection of this manual.
Your participation report can be either public and opened for viewing or be private and closed for all report viewers outside of the account. Use the **Report Status** option to change the report status.

Use the **Access Restrictions** option to allow access to the participation report for certain people or apply a password. If you need to open access to particular contacts only, select that option and provide unique contacts’ IDs which corresponds to the **Unique Key** in the Contact Manager.

**Publish options** allow you to send link to report via email or export participation data to external applications:

- **Email Report** – select this option and click Next. Click the Edit Email button to compose your message instead of the default text. Decide whether you want to send link to report or the actual report in the email body, then select the sending pattern. When done, provide the email addresses you want to email participation report to each on a new line and click the Email Report button.

- **Print Report** – select this option and click Next if you want to create a hard copy of your participation report. You can create color or black and white copy of your report, as well as portrait or landscape orientation. Select appropriate options and click Convert to PDF.

- **Export to Excel** – exports your participation report to Excel spreadsheet.

- **Export to SPSS** – exports your participation report to SPSS.

- **Export to CSV** – export your participation report to a delimited file.

- **New FTP Upload** – this option allows you to automatically upload participation reports to **FTP server** on a regular basis.
360 survey report

360 Survey reports allow you to perform advanced data analysis per survey subjects and participants.

To access particular survey report click the Report button from the Survey Information pane from the Surveys Home page. You can also click the Report button from the main navigation menu at the top and then navigate to necessary report by selecting it from the folders tree in the left part of the reports dashboard. Each folder represents particular survey folder and survey itself.

Standard report is created automatically for each survey and is ready for previewing collected data.

To perform advanced data analysis create new custom report by clicking the New Report button at the top of the Reports pane. For more details consult the Reporting Basics and Summary Report sub-sections of this manual.

We will look into particular features that are applicable for 360 Survey Reports only.
Edit Subjects Weights

When statistics is calculated for your 360 survey reports, subjects’ weights equal to 1.00 by default. In order to represent collected data precisely you can edit these weights.

1. Go to the custom report Edit page.

2. Click the 360 button from the ribbon toolbar on top and select the Edit Weights option.

3. The left box contains list of survey participants. Select the participant to see the list of subjects for this participant.

4. The right box lists subjects of a selected participant. Input appropriate weights for each subject.

5. Click Default to reset weights to the default values.

6. Click Save to save changes and apply new values.
Select Report Subjects and Participants

By default your standard and custom reports contain data per all 360 survey subjects and participants. If you need to analyze data for particular subjects and participants only create new custom report and then:

1. From the Edit Report page select Select Subjects or Select Participants from the 360 section on the ribbon toolbar.

2. There are two filters available for both features:
   - **Simple filter** allows you to select only appropriate contacts or create organizational chart dependencies. For more information see the Contact Groups sub-section for the Contact Manager section of this manual.
   - **Dynamic filter** is used to display only certain subjects and participants to each of the report viewers. This feature works along with the Access Restrictions feature that is available on the report Publish section. Thus report viewers who have access to your 360 survey report and who are logged into the system, will see their report with particular subjects and participants only depending on the filters set.
     - Click the New Dynamic Filter button.

   - Setup relations between the report viewer and subjects or participants. This means that report viewer will see only those subjects or participants whose data within the selected field match report viewers data in the selected field.
• You can create recursive filters, allowing report viewer to see not only their own subjects or participants that match filter criteria, but also their subjects’ subjects, related participants and so on. They will have access to anyone connected to them down the chain. For that select the Use recursive selection option.
  NOTE: You can apply recursive filter only if subject’s and participant’s related fields are not the same.
• Reverse filter – reverts current filter and include subjects or participants, who does not match filter criteria.
• Click the Save button to save changes and add new dynamic filter.

3. When creating complex filters, apply one of the next filter logic operators:
• Select AND logic to include records that meet conditions of all your filters.
• Select OR logic to include records that meet conditions of at least one of your filters.
• Select Custom to use combined filtering. Specify the way of combining your filters in the text field.
  To denote filters use Fx tokens. Use parentheses to make your logic unambiguous.

4. Click Save and go Back to the Edit Report page.
Subjects Summary Table

Subject summary table is used to analyze collected data within your 360 survey per survey subjects or participants.

To add new table to your custom report:

1. Select custom report and click the Edit button from the Report Information pane in the right.

2. From the Edit Report page select the 360 Subject Summary Table option from the Insert dropdown menu or from the More section on the ribbon toolbar.

3. Name new table and click Save.

4. From the Add New Column dropdown menu select the columns for your table.
   - Subject Property – adds any subjects’ data from the contact manager.
   - Count of Responses – counts collected responses per each subject. You can also single out any particular row by coloring it if number of responses exceeds or does not exceed the indicated ones.
• **Question Statistics** – this option calculates selected statistical quantity for the indicated question. You can edit question label, select type of statistics to calculate and color table cells depending on their values.

![Edit Column: Question Statistics](image)

• **Number of Ratings** – lists numbers of each rating for the selected question.

![Edit Column: Number of ratings](image)
• **Row Statistics** – is used to calculate statistics per row (subject), insert this column, select the statistics to calculate and columns to include in the statistics.

5. Click the **Display Options** button to customize table appearance in the summary report.

6. Select columns you do not want to appear in the summary table and click the **Delete Columns** button.

7. You can select both subjects and participants for the summary table calculation, click **Select Subjects** or **Select Participants** buttons for that. Detailed information you will find in the **Select Report Subjects and Participants** subsection.

**Subject Summary Table Preview**

<table>
<thead>
<tr>
<th>Subject Name</th>
<th>Subjects Email</th>
<th>[Q2] Overall, how would you evaluate the performance of the candidate?</th>
<th>Number of Poor ratings</th>
<th>Number of Average ratings</th>
<th>Number of Good ratings</th>
<th>Number of Excellent ratings</th>
<th>Number of Outstanding ratings</th>
<th>Count of Responses</th>
<th>Overall, how would you evaluate the performance of the candidate?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support</td>
<td><a href="mailto:support@worldapp.com">support@worldapp.com</a></td>
<td>5.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>5.00</td>
</tr>
<tr>
<td>William</td>
<td><a href="mailto:sales@worldapp.com">sales@worldapp.com</a></td>
<td>4.00</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4.00</td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td>4.50</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>4.50</td>
</tr>
<tr>
<td>Median</td>
<td></td>
<td>4.50</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>4.50</td>
</tr>
</tbody>
</table>
Detailed Subject Report Reference

Detailed report reference is a sub-report that is created within the main custom report and displays data per each subject.

1. Select custom report and click the Edit button from the Report Information pane in the right.
2. From the Edit Report page select the 360 Detailed Subject Report Reference option from the Insert dropdown menu or from the More section on the ribbon toolbar.
3. Give a name to your detailed report and click Save.
4. The Items page of the sub-report is similar to the regular survey Edit Report page. For more details consult the Advanced Report Features of the regular surveys reporting section.
5. When you are done with sub-report customization, save changes and click the Main Report button in the right top to go back to the main custom report.

Report viewer will see the list of 360 survey subjects. If click on the hyperlinked subject name, sub report will pop-up in a new window and will display data per this particular subject only.
Subject Comparison Table

This type of report table is used to compare data between different questions in the same 360 survey report or different 360 surveys and reports.

1. Select custom report and click the Edit button from the Report Information pane in the right.
2. On the Edit Report page select the 360 Subject Comparison Table option from the Insert dropdown menu or from the More section on the ribbon toolbar.

3. Name your comparison table.
4. Select a question from the current report to compare data and label table column for the selected question's data.
5. Select report and question you want to compare data with, then label table column for the selected question's data.
6. Select the statistics type to calculate selected question's values.
7. Select the Show Difference option to calculate difference between compared questions. To mark out particular cells indicate data bounds and color values that are out or in the indicated bounds with appropriate colors.
8. Click the Save button to save changes.
Here is the example of subjects comparing between two different surveys conducted during different time periods. The table also calculates the average meaning and median per each table column by default.

<table>
<thead>
<tr>
<th>Subject Name</th>
<th>Result 1</th>
<th>Result 2</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support WorldAPP</td>
<td>5.00</td>
<td>5.00</td>
<td>0.00</td>
</tr>
<tr>
<td>William Hanney</td>
<td>4.00</td>
<td>4.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Average</strong></td>
<td>4.50</td>
<td>4.50</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Median</strong></td>
<td>4.50</td>
<td>4.50</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Advanced Subject Comparison Table

This type of table is used to combine data from different 360 surveys and reports.

1. Select custom report and click the **Edit** button from the **Report Information** pane in the right.
2. On the **Edit Report** page select the **360 Advanced Subject Comparison Table** option from the **Insert** dropdown menu or from the **More** section on the ribbon toolbar.
3. Name new table and click **Save**.
4. By default there are no columns yet, except the **Subject Name**. To add more columns to the table use the **Add New Column** dropdown menu.

- **Subject Property** – adds column with subject’s data that is stored in the Contact Manager.
- **Question Statistics** – this column counts statistics per each subject. Select the survey, its report and question to calculate statistics for, then select the statistical quantity. Input a new label for this column if necessary and click **Save** to add it to the advanced comparison table. You can add as many columns of
this type as needed from different 360 survey reports to compare data within one table.

- **Count of Responses** – this column displays the number of ratings given by survey participants to each subject. Select a 360 survey, its report and question to display the response count. Input new label if necessary and click **Save**.

Use the position arrows to change the column order in the table.

To organize data within the table click the **Sort Records** button. Here you can adjust the table data sorting and set the sorting order. Click **Save** when done.
To delete columns from the table select appropriate columns and click **Delete Columns**.

**Advanced Subject Comparison Table Preview**

<table>
<thead>
<tr>
<th>Subject Name</th>
<th>Subjects Email</th>
<th>SUM</th>
<th>Count of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>William Henney</td>
<td><a href="mailto:sales@worldapp.com">sales@worldapp.com</a></td>
<td>4.00</td>
<td>1</td>
</tr>
<tr>
<td>Support WorldAPP</td>
<td><a href="mailto:support@worldapp.com">support@worldapp.com</a></td>
<td>5.00</td>
<td>1</td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td>4.50</td>
<td>1.00</td>
</tr>
<tr>
<td>Median</td>
<td></td>
<td>4.50</td>
<td>1.00</td>
</tr>
</tbody>
</table>

**Advanced Subject Comparison Table**

This type of table is used to combine data from different 360 surveys and reports to compare the data.

1. Select custom report and click the **Edit** button from the **Report Information** pane in the right.

2. On the **Edit Report** page select the **360 Advanced Subject Comparison Table** option from the **Insert** dropdown menu or from the **More** section on the ribbon toolbar.

3. Name new table and click **Save**.

4. By default there are no columns yet, except the **Subject Name**. To add more columns to the table use the **Add New Column** dropdown menu.
• **Subject Property** – adds column with subject’s data that is stored in the Contact Manager.

• **Question Statistics** – this column counts statistics per each subject. Select the survey, its report and question to calculate statistics for, then select statistical quantity. Input a new label for this column if necessary and click **Save** to add it to the advanced comparison table. You can add as many columns of this type as needed from different 360 survey reports to compare data within one table.

• **Count of Responses** – this column displays number of ratings given by survey participants to each subject. Select 360 survey, its report and question to display the response count. Input a new label if
necessary and click **Save**.

Use the position arrows to change columns order in the table.

To organize data within the table click the **Sort Records** button. Here you can adjust table data sorting and set sorting order. Click **Save** when done.
To delete columns from the table select appropriate columns and click **Delete Columns**.

**Advanced Subject Comparison Table Preview**

<table>
<thead>
<tr>
<th>Subject Name</th>
<th>Subjects Email</th>
<th>SUM</th>
<th>Count of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>William Hanney</td>
<td><a href="mailto:sales@worldapp.com">sales@worldapp.com</a></td>
<td>4.00</td>
<td>1</td>
</tr>
<tr>
<td>Support WorldAPP</td>
<td><a href="mailto:support@worldapp.com">support@worldapp.com</a></td>
<td>5.00</td>
<td>1</td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td>4.50</td>
<td>1.00</td>
</tr>
<tr>
<td>Median</td>
<td></td>
<td>4.50</td>
<td>1.00</td>
</tr>
</tbody>
</table>

**Participants Reporting**

The data you collected using 360 surveys can also be analyzed from the view of survey participants.

Similar to the subjects reporting you can create the following items in 360 survey report:

- Participant Summary Table
- Detailed Participant Report Reference
- Participant Comparison Table
- Advanced Participant Comparison Table

The list of features and creation instructions for these report items are the same as for subjects reporting that are described earlier in this section.
Combine Different Report Items

360 survey reporting gives you an ability to perform flexible analysis of collected data by combining data from different reports into one report. This is commonly used if you need to compare data that is collected for different 360 surveys and reports during different time periods or focus groups.

1. Select custom report and click the Edit button from the Report Information pane on the right.
2. On the Edit Report page select the Copy from Another Report Item option from the Insert dropdown menu or from the More section on the ribbon toolbar.

3. The Available Items field lists all 360 surveys, reports and items you can use for data combining. Select appropriate item and add it to the Selected Items field.
4. Click the Save button to save changes.

**NOTE:** Items that were added from different reports cannot be edited from the current Edit Report page. To customize such items, go to the source custom report and edit from there.
VIII – ACCOUNT SETUP

In this chapter you will learn how to setup and manage your account, Contact Manager and Participant Portal.

- My Account
- Contact Manager
- Participant Portal
- Data Models
- My Account

My Account section contains general information of your account, passwords and synchronization settings for external applications such as Salesforce.com (see Salesforce.com Login Setup section for detailed information) and WorldAPP Analytics, and allows you to edit your account details or change passwords.

My Account

Click the My Account link at the top right when logged into account.

Here you can check general information of your account: account name, personal details of the account owner and others.
Usage Report

On the My Account page you can retrieve account usage information per certain time period such as how many responses you received, number of surveys you created, number of questions within those surveys and many others. Click the Usage Report button and indicate time period to view the usage statistics for.
Update Profile

On the Edit Profile sub-menu you can change details of your account. Fields mark with * are mandatory.

Email *

support@worldapp.com

Zip code

Country

USA

First name *

WorldAPP

Last name *

Support

Company *

SSS

Telephone *

123456789

Language *

English

Your Privacy is guaranteed.
• **Login (Account Name)** can be changed from the **WorldAPP Support** side only. Please use **Live Chat** or email the request to **support@worldapp.com** to change it.

• After you click the **Ok** button, notification email will be sent to the address associated with your account.

• Click **Change Password** from the list on the right to change your account password.
**Change Password**

Here you can change the password that is used to login to your account. Click *Change Password* from the list on the right of the *My Account* page.

![Change Password dialog box](image)

1. Input current account password.
2. Provide new password and confirm by inputting it once again.
3. Click the *Ok* button.

**Security Settings**

Here you can define whether all reports within your account should be created as inactive and even restrict our Support team from accession of your account.

To set your reports to be in/active by default un/check the checkbox on the left side.

- **New reports should be inactive by default**

Also, you can configure support access from respective section on a right:

- Click on the Configure support access option and check the Allowing option.
- Select needed time period for access revoking and Save settings.
Once changes are saved you can see the details displayed on the same Security settings page. You can reset them at anytime by clicking the same link for access configuring.
Survey Metadata Setup

Survey Metadata is used to add notes and details to your surveys. Just create the metadata you want to be added for the survey and when designing a survey navigate to the survey Settings page to add metadata. This notes will not be displayed to survey respondents, but only to those who works in your account or a Workgroup.

For example: You can leave notes about who is responsible for the certain survey or in which region the survey is distributed.

Example of the metadata added to the survey:
Contact Manager

Contact Manager is a storage where all your contacts and contacts’ information resides. Contacts can be used as regular survey respondents as well as subjects and participants for the 360 Surveys. You can update records at any time by editing, deleting and adding new contacts.

When you access Contact Manager for the first time it does not have any contacts created yet, so you have two options to start:

- Create contacts manually
- Create contacts by importing data from delimited file
- Contact Manager Controls
- Import Contacts
- Contact Groups
Create a Contact Manager from Scratch

Using this option you can create new contacts by inputting all required information manually. It is commonly used, if you do not have contacts data in external data file or to quickly update existing contact list with new contacts.

1. Select the **Create Contact Manager from scratch** option and click **Next**.

2. Before adding new contacts, decide what information your Contact Manager should contain. Add Contact Manager fields. These fields will hold the information for each account.

### Field Manager fields

<table>
<thead>
<tr>
<th>Field name</th>
<th>Format</th>
<th>Unique key</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Number &gt; 0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>General</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email address</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Provide a label for the new field.
- Select field format in accordance with the data that will be stored within this field.
- Click **Add Field** button to save the field.
- Click **New Field** to add one more field.
- When all fields are added, specify the **Unique Key** and **Email** fields. Unique Key will be used as a unique contact identifier and Email will be used for email distribution purposes, so be careful with setting both fields.

**NOTE:** After you add contact to the Contact Manager, you will not be allowed to change these settings.
• Click on the **Name Format** link to define contact name format. You can use the [Name] tag further within the system and invitation emails, that will be substituted with the data from the contact manager.

3. Now when contact columns are set, click the **Add Contact** button to add new contacts.
4. Input contact details. You can leave all fields blank and add contact data later, except the field that was set as a **Unique Key**. Otherwise you will be notified and will not be able to add a contact. The field that is used as a Unique Key can be generated automatically. This will be 9-digit number with random digits.

5. Click **Save & New** to save new contact and add more contacts to the Contact Manager.

6. Click **Save** to finish and go back to the **Contact Manager** home page.

**Create contacts by importing data from delimited file**

Besides adding contacts manually, you can automate this process and add contacts in batches from the delimited file. This must be a UTF-8 encoded CSV file, with the data separated by commas, tabs, spaces, pipes or any other separator. Here is the example of delimited file which can be created in Excel or Notepad:

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Department</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>111</td>
<td>Support</td>
<td>WorldAPP</td>
<td>Support</td>
<td><a href="mailto:support@worldapp.com">support@worldapp.com</a></td>
</tr>
<tr>
<td>222</td>
<td>William</td>
<td>Hanney</td>
<td>Sales</td>
<td><a href="mailto:sales@worldapp.com">sales@worldapp.com</a></td>
</tr>
</tbody>
</table>

You can use delimited file without headers, just an ordered data. When this is done, follow the steps below to import contacts:

7. Select the **Import file with contacts** option and click **Next**.

8. Select location of the data file you are going to import. This can be CSV file saved locally on your computer or a CSV file hosted on the remote FTP or HTTP server. Remote file reference should have the following format `http://yourwebsite.com/sync.csv` or `ftp://yourwebsite.com/sync.csv`.

9. If the data file you are going to import contains column headers select the **Consider First Line as Header** option.

10. Depending on the separator that is used within the data file, select appropriate option from the second step.

11. Click **Next** to proceed further.
12. On the Import File Preview page you will see the structure of the imported file. Click the Next button to proceed.

13. In accordance to the imported file, contact fields will be created automatically. Edit the default column names and set their formats. Click Add Field to add more fields to the Contact Manager.

14. Indicate the fields that will be used as a Unique Key, Email, Login and Password. Unique Key will be used as a unique contact identifier and Email will be used for email distribution purposes. Login and Password will be used for login to Participant Portal. We will add more fields for login and password to avoid the data mess.

15. Click the Next button to save changes and import contacts from the delimited file to the Contact Manager.

When you need to update your Contact Manager records with a new data for existing contacts, or import new contacts, use the Import option.
Contact Manager Controls

Now, when you have contacts created within the Contact Manager, you will learn how to manage this data, share it with other sub-users if you possess a Workgroup account and other additional options.

1. To add new contact manually, click the **Add Contact** button and follow the steps described above in the 'Create contacts manually' subsection.

2. If you want to edit, delete existing columns or add new columns to the Contact Manager click the **Edit Profile Fields** button.
   **NOTE:** You are not allowed to change **Unique Key** and **Email** fields and delete columns if you have contacts in the Contact Manager. To reorganize its structure, you will need to delete all contacts first.

3. To delete contacts from the Contact Manager, select appropriate contacts and click the **Delete Selected** button and confirm your action. You can also select all contacts at once using the top check box.

4. **Import** This option used to add new or update existing contacts in batches using a delimited file from your computer or from a remote source. You can also set up automatical synchronization, so it occurs from time to time automatically without your participation. Consult the Import Contacts subsection of the current section.
5. If your contacts list has many contacts and contains multiple pages, it is easier to find needed record using either **Sorting** or **Search** options.
   - Input keyword you want to search and select appropriate field or search in all fields.
   - Mouse over on the arrow next to the field you want to sort contacts by and select the ascending or descending option.

6. In case you have too many columns and some of them you do not need to display at the moment, just select which columns you need to show or hide.

7. You can export the list of your contacts to an Excel or CSV file. Click the **Export** button at the right top of the **Contact Manager Home** page.

8. Contact Manager has two display modes. You can switch between these modes by clicking appropriate link at the top of the contacts list.
   - **Response statistics** – in this mode you will see contacts participation activity in your surveys.
   - **Profile Information** – this mode shows contact profile information.

9. The data that is calculated and displayed in the **Response Statistics** mode can be customized. Click the **Settings** button for that.
Account Setup

- **Registration** score is assigned to new contacts that are registered via the survey with the Register to the Contact Manager plugin applied. Those who correctly fill out the survey will be automatically added to the Contact Manager and will be assigned with the score you set up.

- **Started Survey** score is assigned when respondents start participating in the new survey.

- **Finished Survey** score is assigned for each new submitted survey.

- Based on the assigned scores indicate the value to highlight contacts if their score is below the indicated range.

- If you want to exclude from your distribution campaigns those respondents who do not participate in your surveys, indicate the number of days after which such contacts should go inactive. To change contact status go to the Edit Single Contact page by clicking the Edit link next to the appropriate contact.
Import Contacts

You can import contacts either from the delimited file that is stored locally on your computer or from the file that resides on the remote FTP or HTTP sources. Import from the remote servers allows you to schedule automatic synchronization and update your contacts depending on the reoccurrence settings you choose.

1. Click the Import button from the Contact Manager page.

2. Click Setup New Import.

3. Select whether the file will be imported from a local or a remote source. For detailed description on the importing contacts from a local file see the Create contacts by importing data from delimited file sub-section.

4. Input the link to the data file. Select the Consider First Line as Header option if the data file contains column header.

5. Select data separators used in the imported file.

6. You can keep Contact Manager up to date by deleting contacts that do not appear in the data file or by updating contacts with the new data.

7. Click the Next button to preview the structure of the imported file.

8. If imported data matches your requirements click Next.
9. Map Contact Manager columns with the delimited file’s columns so the data flows correctly. Just select the pair of file column and Contact Manager field and click **Apply Mapping**.

![Map Contact Manager columns with the delimited file’s columns](image)

**Mapped Columns**
- Column 1 (111) => ID
- Column 2 (Support) => First Name

**Unique Key**
- Remove

**Remove**

10. After mapping all fields set the unique key. Thus contacts in the imported file will be compared with the existing contacts in the Contact Manager to identify whether this is a new contact or an existing one.

11. Click the **Next** button to schedule contacts import.

![Schedule Import](image)

**Set scheduled updates**
- Import time: 0:00
- US/Eastern

**Recurrence pattern**
- Daily
- Weekly
- Monthly
- Yearly

- Every 1 days
- Every Weekday

**Range of recurrence**
- Start: 2012-10-01

**In case of errors during the import send the report to: support@worldapp.com**

12. Set up the schedule settings. If you want to perform contacts import only once set the desired date and time and input “1” in the **End after 1 occurrences** option.

13. Click the **Finish** button to schedule contacts import from the remote source.

New synchronization with a remote source is scheduled for a future date now. To synchronize contacts right away click the **Go** button next to it. This option is available for remote synchronizations only.
Contact Groups

Groups are used to quickly access the list of particular contacts or allow different users of your workgroup accessing only appropriate contacts from the Contact Manager.

The default group named All Contacts contains all contacts from your Contact Manager. You can see the details per each contact.

To create new view and add particular contacts to it, follow the steps below:

1. Click the New button from the groups pane in the left part of the Contacts Home page.

2. Name new group and click the New Filter button to add filter criteria for the new group contacts.

3. Contacts can be filtered by profile records, activity as well as data format:
   - Profile Filter – Select the Contact Manager field you wish to filter contacts by. You will see the list of all available column headers. Select the appropriate data values and click Add. If your Contact Manager has a long list of values use the Search option to locate required ones.
• **Condition Filter** – Select the Contact Manager field you wish to filter contacts by. You will see the list of all available column headers. Select the appropriate data values and click **Add**. If your Contact Manager has a long list of values use the **Search** option to locate required ones.

![Condition Filter Image](image1.png)

• **Activity Filter** - Indicate the activity requirements for a more detailed search if necessary.

![Activity Filter Image](image2.png)

4. Click the **Add filter** button to save changes and filter out contacts for a new group.

5. Activate/deactivate the **Exclude filter** feature to create a filter with the **NOT** operator applied.

6. You can add as many filters as you need, then apply appropriate logic rule for filters to work correctly.

**NOTE:** The **AND**, **OR** and **Custom** logic operators may only be applied upon the creation of multiple filters. **For Example:** F1 AND F2 means that if contact meets both filter criterion, it will be included into the group.

7. When you are done click the **Save** button.
Org Chart

Org Chart – is a custom filter that allows you to filter your objects list based on the organizational structure of your company.

**NOTE:** To make this filter work correctly, your contact manager must be setup accordingly, so it contains columns that associate contacts with each other and show organizational structure.

Let us take a look at the following example:

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Department</th>
<th>Position</th>
<th>Manager ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Matt</td>
<td>Stranger</td>
<td>UM</td>
<td>Manager</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Robert</td>
<td>Sheiffer</td>
<td>PJM</td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>John</td>
<td>Harris</td>
<td>IT</td>
<td>IT Specialist</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>Marella</td>
<td>Carson</td>
<td>Sales</td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>William</td>
<td>Morrell</td>
<td>Sales</td>
<td>Senior Sales Engineer</td>
<td>4</td>
</tr>
</tbody>
</table>

Columns that represent organizational structure in this example are the **ID** and **Manager ID**. This means that **Manager ID** field coincide with the **ID** field of other person who is actually the manager of that one (Robert Sheiffer is manager for Matt Stranger, Marella Carson is manager for William Morrell and so on.)

8. When creating a filter for the contacts group, select the **Org Chart** option.

9. Click **Setup** to set relations and create organization dependencies. You can add as many relations as needed.

10. Click the **Apply** button to set up the relation.

11. Click the **Back** button.

12. Now when relations are set, select the appropriate relation.

13. Select contacts and add them to the Org Chart.

14. Select the **Include Root** option to include to the list of filtered contacts the top contact of the organizational structure.

15. Click **Save Changes** to filter contacts by the indicated organizational relations.

16. Similar to a simple filters creation, you can use logical expressions and create complex filters. Thus your group will include only selected contacts and contacts they depend on, which are higher or lower in the organizational structure.
Participant Portal Settings

Participant Portal is a workspace where all your survey participants can access their regular or 360 surveys. Here on the settings page you will need to adjust portal settings before participants access it.

1. Click the **Portal** button at the very top from the main navigation menu of your account.

2. The **Portal Settings** pane in the left has the following controls:
   - **Portal Title** is displayed to the participants.
   - **Table Heading** Portal consists of the table with the list of surveys participant has to fill out.
   - Select **Authentication** mode for participants to access Portal. Be careful with the settings of this option since once you apply it, you cannot change it.
   - Select contact columns for respondent verification. It is recommended to create separate **Login** and **Password** fields in the Contact Manager to keep these records.
   - **Require password change at first login for all new users** allows participants themselves create the password when they login for the first time. Thus you will not need to provide them with the passwords you created.
   - **Links** shown on the portal can be used to redirect users to external pages with instructions or to your company’s web site. **Logout** is the default available link that will allow participants to log out from the Portal.
   - Adjust **Portal Available** dates when it will be opened for the participants. You can set a certain period of time or make it always available for login and participation.
   - Select the **Show Survey Metadata** option to display survey metadata in the **Surveys List** table.
3. **Portal Appearance** pane is used to apply custom portal design. You can add logo, background image and edit default styles. Just click on the element from the list and apply new font, text alignment, colors and other design options. You can also customize Portal CSS. Click the **Edit CSS** link for that.

4. **Portal URL** – is a general link used to access the Portal by the participants.
Data Models

Custom Data Models are your custom tables of any information lists. You can create multiple data tables, and then use these records in different distribution campaigns. You can update objects at any time by editing, deleting and adding new records.

When you access Data Models for the first time it does not have any objects created yet, so you have two options to start:

- Create objects manually
- Create objects by importing data from delimited file
- Data Models Controls
- Import Objects
- Org Chart
Create Data Model from Scratch

Using this option you can create new objects by inputting all required information manually. It is commonly used, if you do not have data tables in external data file or to quickly update existing record list with new objects.

1. Name you Data Model.
2. Select the **Create object by manually editing fields** option and click Next.
3. Before adding new records, decide what information your Data Model should contain. Add Data Model fields. These fields will hold the information for each object.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Format</th>
<th>Unique key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>General</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Phone Number</td>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Number of Employees</td>
<td>Number &gt; 0</td>
<td></td>
</tr>
<tr>
<td>Administrator Email Address</td>
<td>Email address</td>
<td></td>
</tr>
</tbody>
</table>

- Provide a label for the new field.
- Select field format in accordance with the data that will be stored within this field.
- Click **Add Field** button to save the field.
- Click **New Field** to add one more field.
- When all fields are added, specify the **Unique Key** field. Unique Key will be used as a unique object identifier, so be careful with setting this field.

**NOTE:**
After you add an object to the Data Model, you will not be allowed to change this parameter.

- Click on the **Name Format** link to define object name format. You can use the [Name] tag further within the system and invitation emails, that will be substituted with the data from the Data Model.
- Click **Save** to save changes.
4. Now when object columns are set, click the **Add Object** button to add new objects.

5. Input object details. You can leave all fields blank and add object data later, except the field that was set as a **Unique Key**. Otherwise you will be notified and will not be able to add an object.

   The field that is used as a Unique Key can be generated automatically. This will be a 9-digit number with random digits.

6. Click **Save & New** to save new object and add more objects to the Data Model.

7. Click **Save** to finish and go back to the **Data Models** home page.
Create objects by importing data from delimited file

Besides adding objects manually, you can automate this process and add objects in batches from the delimited file. This must be a UTF-8 encoded CSV file, with the data separated by commas, tabs, spaces, pipes or any other separator. Here is the example of delimited file which can be created in Excel or Notepad:

<table>
<thead>
<tr>
<th>Country</th>
<th>City</th>
<th>Address</th>
<th>Phone Number</th>
<th>Number of Employees</th>
<th>Administrator Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>Boston</td>
<td>220 Forbes Road Suite 400 Braintree MA 02184</td>
<td>(781) 356-8997</td>
<td>80</td>
<td><a href="mailto:usoffice@worldapp.com">usoffice@worldapp.com</a></td>
</tr>
</tbody>
</table>

You can use delimited file without headers, just an ordered data. When this is done, follow the steps below to import objects:

1. Select the **Import file with objects** option and click **Next**.

2. Select location of the data file you are going to import. This can be a CSV file saved locally on your computer or a CSV file hosted on the remote FTP or HTTP server. Remote file reference should have the following format `http://yourwebsite.com/sync.csv` or `ftp://yourwebsite.com/sync.csv`.

3. If the data file you are going to import contains column headers select the **Consider First Line as Header** option.

4. Depending on the separator that is used within the data file, select appropriate option from the second step.

5. Click **Next** to proceed further.

6. On the **Import File Preview** page you will see the structure of the imported file. Click the **Next** button to proceed.
7. In accordance to the imported file, the object fields will be created automatically. Edit the default column names and set their formats. Click Add Field to add more fields to the Data Model.

8. Indicate the field that will be used as a Unique Key. The Unique Key will be used as a unique object identifier and Email will be used for email distribution purposes.

9. Click the Next button to save changes and import objects from the delimited file to the Data Model.

When you need to update your Data Model records with a new data for existing objects, or import new objects, use the Import option.
Control of Data Models

Now, when you have objects created within one of the Data Models, you will learn how to manage these records, share it with other sub-users if you possess a Workgroup account and other additional options.

1. To add new object manually, click the Add Object button and follow the steps described above in the ‘Create objects manually’ subsection.

2. If you want to edit, delete existing columns or add new columns to the Data Model click the Edit Fields button.

   **NOTE:** You are not allowed to change Unique Key field and delete columns if you have objects in the Data Model. To reorganize its structure, you will need to delete all objects first.

3. To delete objects from the Data Model, select appropriate objects and click the Delete Selected button and confirm your action. You can also select all objects at once using the top check box.

4. **Import** This option used to add new or update existing objects in batches using a delimited file from your computer or from a remote source. You can also set up automatical synchronization, so it occurs from time to time automatically without your participation. Consult the Import Objects subsection of the current section.

5. If your objects list has many objects and contains multiple pages, it is easier to find needed record using either Sorting or Search options.
• Input keyword you want to search and select appropriate field or search in all fields.
• Mouse over on the arrow next to the field you want to sort objects by and select the ascending or descending option.

6. In case you have too many columns and some of them you do not need to display at the moment, just select which columns you need to show or hide.

7. You can export the list of your objects to an Excel or CSV file. Click the Export button at the top left corner of the Data.
Import Objects

You can import objects either from the delimited file that is stored locally on your computer or from the file that resides on the remote FTP or HTTP sources. Import from a remote servers allows you to schedule automatical synchronization and update your objects depending on the recurrence settings you choose.

1. Click the Import button from the Data Models page.

2. Click Setup New Import.

3. Select whether the file will be imported from a local or a remote source. For detailed description on the importing objects from a local file see the Create objects by importing data from delimited file subsection.

4. Input the link to the data file. Select the Consider First Line as Header option if the data file contains column header.

5. Select data separators used in the imported file.

6. You can keep Data Models up to date by deleting objects that do not appear in the data file or by updating objects with the new data.

7. Click the Next button to preview the structure of the imported file.

8. If imported data matches your requirements click Next.
9. Map Data Model columns with the delimited file's columns so the data flows correctly. Just select the pair of file column and Data Model field and click **Apply Mapping**.

10. After mapping all fields set the unique key. Thus objects in the imported file will be compared with the existing objects in the Data Model to identify whether this is a new object or an existing one.

11. Click the **Next** button to schedule objects import.
12. Set up the schedule settings. If you want to perform object import only once set the desired date and time and input "1" in the **End after 1 occurrences** option.

13. Click the **Finish** button to schedule objects import from the remote source.

New synchronization with a remote source is scheduled for a future date now. To synchronize objects right away click the **Go** button next to it. This option is available for remote synchronizations only.
Object Groups

Groups are used to quickly access the list of particular objects or allow different users of your workgroup accessing only appropriate objects from the Data Model.

The default group named All Objects contains all objects from your Data Model. You can see the details per each object.

To create new view and add particular objects to it, follow the steps below:

1. Click the New button from the groups pane in the left part of the Data Models home page.

   Customize group filters
   
   1. **Group Name:**
      
      Europe Offices
   
   2. **Add filter**
      
      New Filter

2. Name new group and click the New Filter button to add filter criteria for the new group objects.

3. Objects can be filtered either by profile records or by their activity:
   
   • **Profile Filter** – Select the Data Model field you want to filter objects by. You will see the list of all available objects. Select appropriate objects and click Add. If your Data Model has a long list of objects use the Search option to locate required ones.

4. Click the Add filter button to save changes and filter out objects for a new group.
5. You can add as many filters as you need, then apply appropriate logic rule for filters to work correctly. You can use the **AND** or **OR** logic operators to create custom complex expressions.  
**For Example:** F1 AND F2 means that if object meets both filter criterions, it will be included into the group.

6. When you are done click **Save**.
**Org Chart**

Org Chart – is a custom filter that allows you to filter your objects list based on their organizational structure within your table.

**NOTE:** To make this filter work correctly, your Data Model must be setup accordingly, so it contains columns that associate objects with each other and show organizational structure.

Let us take a look at the following example:

<table>
<thead>
<tr>
<th>ID</th>
<th>First Name</th>
<th>Last Name</th>
<th>Department</th>
<th>Position</th>
<th>Manager ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Matt</td>
<td>Stranger</td>
<td>UM</td>
<td>Manager</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Robert</td>
<td>Sheiffer</td>
<td>PJM</td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>John</td>
<td>Harris</td>
<td>IT</td>
<td>IT Specialist</td>
<td>6</td>
</tr>
<tr>
<td>4</td>
<td>Marella</td>
<td>Carson</td>
<td>Sales</td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>William</td>
<td>Morrell</td>
<td>Sales</td>
<td>Senior Sales Engineer</td>
<td>4</td>
</tr>
</tbody>
</table>

Columns that represent organizational structure in this example are the **ID** and **Manager ID**. This means that **Manager ID** field coincide with the **ID** field of other person who is actually manager of that one (Robert Sheiffer is manager for Matt Stranger, Marella Carson is manager for William Morrell and so on.)

7. When creating filter for a objects group, select the Org Chart option.
8. Click Setup to set relations and create organization dependencies. You can add as many relations as needed.
9. Click the Apply button to set up the relation.
10. Click the Back button.
11. Now when relations are set, select appropriate relation.
8. Select objects and add them to the Org Chart.
9. Select the Include Root option to include to the list of filtered objects the top object of the organizational structure.
10. Click Save Changes to filter objects by the indicated organizational relations.
11. Similar to a simple filters creation, you can use logical expressions and create complex filters. Thus your group will include only selected objects and objects they depend on, which are higher or lower in the organizational structure.
IX – ADMINISTRATION

Not all data is created equal and it's important to ensure the proper controls are in place to ensure segmentation keeps sensitive information from being accessed by inappropriate parties. Key Survey provides several layers of security/permissions to give complete management authority to administrators. There are Multi-User and Multi-Access user accounts which include Administrator account and sub-accounts. These two account types have principal difference in account management and account structure.

**Multi-User**
- Create Templates for sub-users
- Review and authorize surveys prior to launch
- Assign response limits for sub-users
- Copy surveys between accounts
- Maintain independent data "silos" between sub-users

**Multi-Access**
- Control a group of users with shared responsibility on multiple projects with precision
- Limit functions within the application such as the ability to create/launch/build reports
- Create groups of users within the same account and manage permissions by group.
Multi-user account

The Multi-User account allows you to create and manage multiple sub-user accounts. As an administrator you will have the following administrative abilities:

- Creation and administration of sub-user accounts
- Adding sub-user accounts

Creation and Administration of Sub-user Accounts

When you have purchased a multi-user license, your sales representative sets your account as Multi-user Admin and on 'User Administration Account' page and limits the number of sub-user accounts at your request.

**NOTE:** The number of sub-user accounts that can be added to your multi-user account cannot exceed your user license limit.

To manage your sub-user accounts click the Administration button from the main navigation menu at the top of your account.

- **Annual subscription expires on** – Shows the date when your subscription will expire.
- **Maximum number of accounts allowed** – Shows how many accounts you are allowed to create.
- **Respondents total** – Total number of respondents from all the surveys of this user.
- **Total credits used** – Shows how many credits you have used.
- **Total credits still available** – Shows how many credits are left on your account.
- **Name** – Names of existing sub-users are listed here.
- **Login** – Logins of corresponding sub-users are indicated here.
- **Credits Available** – This column shows how many credits are available for each corresponding sub-user. Clicking its hyperlinked number you can allocate additional credits. Use negative number to withdraw credits.
• **Respondents Total** – shows the number of credits used by the sub-user.
• **Suspend User** – denies access to the account for the sub-user.
• **Show our Templates** – allows sub-users to use Administrator account’s surveys as templates.
• **Launch Approval Required** – allows sub-user launching the survey.
• **Allow to use Theme Library** – opens Theme Library templates for a sub-account.

**NOTE:**

• Administrator can create and view reports on any survey from any sub-user account.
• The surveys created on your master account can be available to sub-users as templates.
• The surveys designed on any of sub-accounts can be copied to your Master account and thus can be available to other sub-users as templates.
If you want to use sub-account surveys on other accounts follow the steps below:

1. On your master account click the **New Survey** button from the **Home Page**.

2. Select **Copy Existing Survey/Form**.

3. Surveys within the pop-up dialog are grouped by sub-accounts. Roll over appropriate sub-account and select a survey you want to copy.
4. Click **Next** to proceed.

5. Modify survey content and layout if needed.

6. This survey is now available to other sub-users as template. It is listed in the templates category. To use it, your sub-users can simply design a new survey from this template.
Adding Subuser Accounts

You can create new sub-users account right from your Administration account.

1. Click the Administration button from the main navigation menu at the top.

2. Click the New Sub-account button.

3. Fill out the form on the ‘Add New Account’ page.

4. Click the Save button to submit new account information and create new sub-account.

**NOTE:**
The number of sub-accounts that can be added to your multi-user account cannot exceed your user license limit.
Multi-Access account

A Multi-Access account is a single account with multiple logins. It enables the account owner to specify access levels for other sub-users of the account. The account owner could configure access to account resources for sub-users or sub-user groups by granting permissions such as read, edit, delete, launch, publish and others.

If you purchase ‘Multi-Access License’ you will have the following administrative abilities:

- Access-Level Management
- Adding New User
- Adding New Group
- Editing User Profile
- Editing Group Profile
- Access Permissions
Access-level Management:

When you have purchased a Multi-Access license, your sales representative sets your account as Multi-Access Admin type and limits the number of sub-users at client’s request.

**NOTE:** The number of sub-users who can be added to your multi-access account cannot exceed your user license limit.

To manage your access levels click the Administration button from the main navigation menu.

On this page you can find the Access Permission tree in the left pane containing two first-level folders:

- Users
- Groups.

**Users:** This folder includes the list of available users. Clicking ‘+’ next to the folder will open the users list. If there are no users yet, click the New User button to create a new user. The Users folder is linked (clicking it will open the user table in the right pane).

**User Table Menu:**

**Name:** Displays the names of sub-users who have been added to this account.

**Login:** Displays sub-users’ login names.

**Last Visit:** The date and the time when the most recent login occurred.

**Groups:** Lists the groups that the sub-user belongs to. If the sub-user does not belong to any group, he is marked as Individual. The group name is linked. Click it to edit the group profile.

**Active:** Indicates whether sub-user status is active or not. Active subusers are in black. Inactive subusers are in grey. The status can be changed on User Profile page.

Action Includes the following options:

- Click the Edit button to apply changes to sub-user’s profile.
- Click the Delete button to remove sub-user from your workgroup.
**Groups:** This folder includes the list of available groups. Clicking ‘+’ next to the folder will open the groups list. If there are no groups yet, click the New Group button to create a new group. Groups folder is linked (clicking it will open the groups table in the right pane).

**Group Table Menu:**

**Name:** Displays the names of groups that were created in this account.

**Members:** Lists the members who belong to this group. Click the member name to edit the user profile.

**Action** Includes the following options:
- Click the **Edit** button to apply changes to group profile.
- Click the **Delete** button to remove group from your workgroup.

**NOTE:**
- Any modifications in the set of plan features that comes with the subscription of the main account will be reflected in all sub-accounts. The modifications of the sub-account plan features do not affect the main account.
- Sub-accounts are not provided with a separate bank of survey credits. All credits are withdrawn from the main account.
- If several sub-users edit the same object (survey, question), then the system saves the changes submitted by the most recent **Save** click.
Adding New User:

1. Go to the Administration page of your account.

2. Click the **New User** button.

3. Fill out new user's account details.

4. Click the Save button to submit new sub-user information.

**NOTE:**

- Click the **Cancel** button to empty all the form fields.
- All fields marked with * are mandatory.
- When added, sub-user will receive an email notification to the email address indicated in the Email field. The content of the email is as follows: "Your administrator has granted you an access to an account. Listed below is the information in your profile."
- The number of sub-users who can be added to your multi-access account cannot exceed your user license limit.
Adding New Group:

Groups are used to organize users by certain criteria and then assign access rights to all sub-users who belong to this group at once.

1. Go to the Administration page of your account.

2. Select the Groups folder from the left pane.

3. Click the New Group button.

4. Name your group.

5. Provide your group with the short description if necessary.

6. Use the right and left arrow buttons to add or remove sub-users from the group.

Click the Save button to submit new group information.

NOTE:

- Click the Cancel button to undo all actions up to the last saved one.
- Once the new account has been saved, the tab Rights appears. Click it to assign access permissions.
Editing User Profile:

1. Click the Edit button next to sub-user from the Administration > Access Levels > Users page.

2. Change the information in the profile fields if needed.

3. Select/clear the Active option to grant/deny account access to sub-user. If this option is not selected, the sub-user will not be able to log into the account.

4. New Password option generates a new password for the sub-user. Once the Save button is clicked a new automatically generated password will be emailed to the sub-user.

5. If any changes were applied to the sub-user profile, select the Notify user immediately option and click Save to send an email notification about profile changes.

6. Individual rights provides sub-user with individual rights.

7. Groups provide sub-user with groups rights. Once clicked, you can select which group the sub-user will belong to.

8. Click the Save button to apply changes to the sub-user profile.

NOTE:
- Click the Cancel button to undo all actions up to the last saved one.
- Click the Rights tab to assign access permissions to this user.
Editing Group Profile:

1. Click the Edit button next to group from the Administration > Access Levels > Groups page.

2. Change the information in the group profile fields if needed.

3. Click the Save button to apply the changes to the modified group profile.

NOTE:

- Click the Cancel button to undo all actions up to the last saved one.
- Click the Rights tab to assign access permissions to this group.
## Access Permissions

The following table describes what each access permission will let you do in a given functional area:

<table>
<thead>
<tr>
<th>Access Permission</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Read**           | The user or user group is able to view the associated resource, but no modifications are allowed. A user or user group with read access is able:  
- to view surveys and custom reports. |
| **Edit**           | The user or user group is able to personalize the associated resource. A user or user group with edit access may also view the resource. A user or user group with edit access is able:  
- to view surveys and custom reports.  
- to edit surveys and custom reports.  
- to create new surveys and new custom reports. |
| **Delete**         | The user or user group is able to delete the associated resource. A user or user group with delete access may also view and edit the resource. A user or user group with delete access is able:  
- to view surveys and custom reports.  
- to edit surveys and custom reports.  
- to create new surveys and new custom reports.  
- to delete surveys and custom reports. |
<p>| <strong>Launch</strong>         | The user or user group is able to launch any survey within this account and send reminders to non-respondents. |
| <strong>Copy</strong>           | The user or user group is able to use surveys as templates and create new surveys by copying existing ones. |
| <strong>Standard Report</strong>| The user or user group is able to view and manage the standard reports. |
| <strong>Publish</strong>        | The user or user group is able to email, print or export into other applications the survey results. |
| <strong>Admin</strong>          | The user is given an administration option and is able to grant access to other users within a workgroup to read, edit, delete, launch, copy surveys and reports. |
| <strong>Custom Categories</strong> | The user has access to “Custom Survey Themes” and can apply them to any survey within a workgroup. |
| <strong>Manage Folders</strong> | The user is able to perform folder operations, such as creating sub-folders, moving surveys and reports between different folders this user has access rights for. Note that surveys and reports can be moved between folders with the same set of rights assigned for this user. |</p>
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal Impersonate</td>
<td>A user is able to impersonate Portal view using unique ID of respondent.</td>
</tr>
<tr>
<td>Edit Contacts</td>
<td>A user can edit respondents in a Contact Manager created by admin account.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> that sub-users are not able to add or delete records in a Contact manager.</td>
</tr>
<tr>
<td>Add and delete contacts</td>
<td>A user can add, edit and delete respondents in a Contact Manager.</td>
</tr>
<tr>
<td></td>
<td>User can also modify Contact Manager database structure.</td>
</tr>
<tr>
<td>Edit Question Analysis Code</td>
<td>A user can edit Question Analysis Code in already created surveys, as well as add one or delete it.</td>
</tr>
<tr>
<td>Edit Question Library</td>
<td>A user has full access to Questions Library and is able to use, add, edit or delete questions and custom categories there.</td>
</tr>
<tr>
<td>Edit objects</td>
<td>A user can edit objects in Data Models created by admin account.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong> that sub-users are not able to add or delete objects in Data Models.</td>
</tr>
<tr>
<td>Add and delete objects</td>
<td>A user can add, edit and delete respondents in Data Models created by admin account.</td>
</tr>
<tr>
<td>Create, delete and modify structure</td>
<td>A user can add, edit and delete respondents in Data Models.</td>
</tr>
<tr>
<td></td>
<td>User can also add, modify and delete Data Models.</td>
</tr>
</tbody>
</table>

Subaccounts with the **Manage Folders** right activated can create private folders. Such folders do not inherit access rights of the higher level folder they are created within. By default private folders will be visible for workgroup administrator and subaccount that created these folders.

**NOTE:**

- Select the **Apply Rights to Sub-folders** option to activate automatically corresponding access rights to all nested sub-folders. If this option is not selected, the access rights may be given separately to the folders and the sub-folders one by one.
- Click the **Save** button to apply all the changes done on this page.
- Click the **Cancel** button to undo all actions up to the last saved one.