Integrated solutions for market intelligence

GMI

SURVEY DESIGN AND CREATION

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Survey Design and Creation

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Survey Design and Creation

Introduction to Survey Design and Creation

Survey Design and Creation is the foundation upon which the success of your research depends. InstantSurvey provides easy-to-use tools for building simple or complex surveys.

Survey Design and Creation allows you to create different types of surveys, import existing questions and questionnaires, and use existing surveys to create new surveys. There are advanced editing features as well as the ability to import media into your survey.

Before starting, however, it is a good idea to review the "Overview" document, and to look at the material in the *Getting Started* link at the top of the *Home* page. This material provides useful information about setting up an account, and setting up a questionnaire.

This section includes:

- **Getting started**.

Three Ways to Create a Survey

There are three ways to create a survey:

- Create the survey from scratch. This is one of two options on the *Home* page and presents you with a "blank slate." You write the questions, the responses, instructions, create the look and feel of the survey and import any images or other effects. For more information, see **Create a New Survey From Scratch**.

- Create a survey from a template. This is the other option on the *Home* page. InstantSurvey comes with many types of templates already available for a number of different types of surveys. This is a good option which provides all the basic questions and responses, but still allows you to customize the survey to fit your needs. For more information, see **Create a Survey From a Template**.

- Create a new survey from one you have already have (either originally done from scratch or a template) and saved as a draft or finished survey. For more information, see **My Surveys**.

Getting Started

To start designing a survey

1. Login with your user name and password. For more information, see the "Overview" InstantSurvey document.

2. When you are logged in to the *Home* page, there are three methods for designing your survey.

Survey Design and Creation
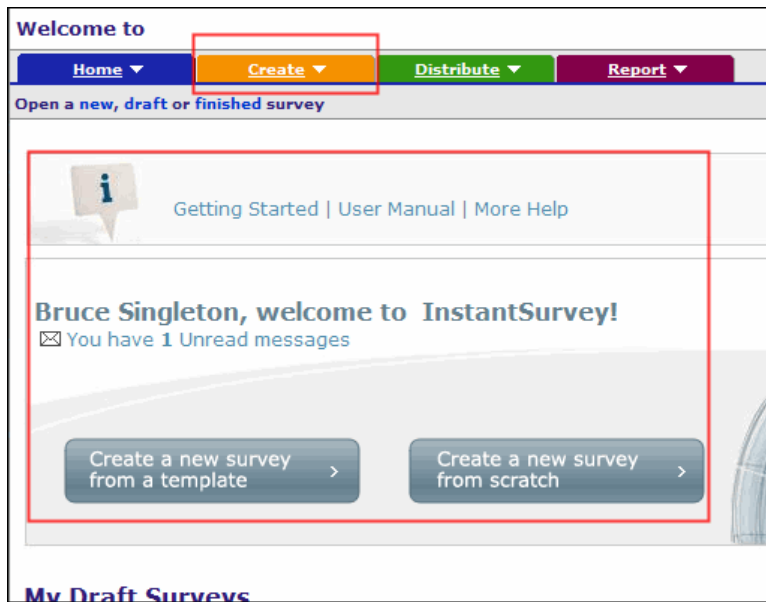
- From the *Home* page, use either of the buttons in the *Getting Started* pane.

  o **Create a new survey from a template**: Allows you to create a survey based on a pre-existing template in InstantSurvey.

  o **Create a new survey from scratch**: Allows you to create a survey from the very beginning.

  Each option has step-by-step instructions.

- Select **new** in **Open a new, draft, or finished survey** just below the tabs. This is the same as **Create a new survey from scratch**.

- From the **Create** tab, expand the tab and use the **Start a New Survey** option in the drop-down list. For more information, see **Create Tab**.

Create A New Survey From Scratch

Use this feature on the *Home* page in the *Getting Started* pane to create a brand new survey, with new elements, respondents and questions.

The new survey create wizard begins after you opt to create your new survey from scratch. It displays on the left side of the page. The highlighted stage indicates the one in which you are currently working.

The sub-topics are:

- **Name and theme**
- **Quick question import**.

To use the wizard for creating a new survey from scratch

1. Log in to InstantSurvey.

2. On the *Home* page, in the *Getting Started* pane, click **Create a new survey from scratch**. The new survey create wizard begins, and opens the *Name and Theme* page. It consists of two stages:

- **Name and Theme**: Allows you to select a name for your survey and choose a color scheme and font for your survey.

- **Quick Question Import**: Allows you to import an existing questionnaire. For more information, see **Quick Question Import**.

    Note: When you reach the last page of the wizard, **Edit Survey***, you will not see a* **Back** *button. Do not use your browser back button to go back in the wizard.*

    You can make any changes or additions to the survey in the Edit Survey *page. For more information, see* ***Overview to Edit Survey****.*

Name and Theme

Survey name and theme on the *Create Survey from Scratch* page allows you to name your survey and decide how the survey will look. Choose a name that reflects the survey's content, panel, or other information that will make it recognizable. The color scheme allows you to choose from a variety of styles and fonts to customize your survey.

To set a survey name and theme

1. In the **Name and Theme** stage of the survey create wizard, set the following:

Survey Design and Creation

- In the *Survey Name* field, enter a survey name that will be displayed at the top of your survey pages (maximum 255 characters).

- From the **Survey Theme** drop-down list, choose a color scheme that matches your brand or that you simply like best. InstantSurvey presents a variety of color schemes and designs.

- In *Sample Survey* pane below, you see the various survey elements in the survey theme you have chosen.

Sample Survey Element	Function
Title	Name of the survey. Appears at the top of every survey page.
Notes	Introductory text, such as instructions, for the respondents. Notes appear in different fonts and sizes.
Category	Tells what type of questions are in this section. **Notes** allows you to enter any additional information.
Question	Question that the respondent answers. **Notes** allows you to enter any additional information.
Response	Respondent answers to the questions. Can be different styles: • **Open Text**: Respondents answer the question in their own words by typing in an response. • **Checkboxes**: Respondents can select more than one answer in a list of multiple options. • **Drop-down Lists**: Respondent choose from options. • **Radio Buttons**: Respondents can make only one selection for an answer out of multiple options.

2. Click **Next** to go to **Quick Question Import**.

Quick Question Import

The *Quick Question Import* is the stage in the survey create wizard for creating questions and responses. It allows you to use a questionnaire that you have already created and paste it from another document into InstantSurvey, or it takes you to a feature in which you enter questions one-by-one.

To use Quick Question Import

1. Use radio buttons to select:

- o **No** - Skip *Quick Question Import* and go to the *Edit Survey* page to enter questions one-by-one.

- o **Yes –** Opens a new pane with the information for using *Quick Question Import*.

2. Follow the steps and advice on the expanded page:

- **Do not try to add Matrix Table Responses at this point** – This means do not insert a matrix table to the *Quick Question Import.*

> ***Note:*** *Use the matrix table entry mode of the Edit Response window to enter matrix table text. See Matrix table in* **Add Response** *for more information.*

- **Use plain text only** – Plain text is available by using the Notepad feature on your desktop. To access it, right click on your desktop, select **New** and select **Text Document**.
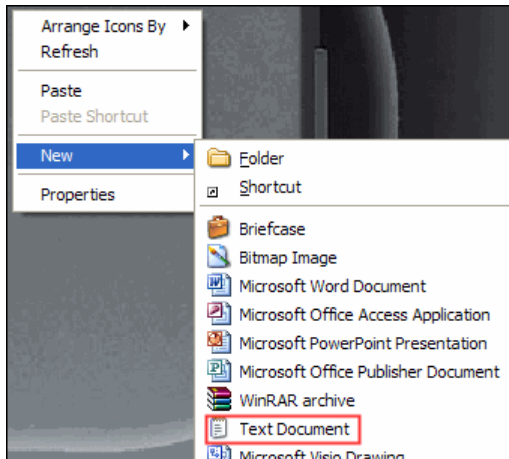
3. Create your questionnaire in the text document, and copy it. Return to the *Quick Question Import* and paste it in the field.

4. (Optional) You can also type directly in the text field in the pane. Be sure and follow the advice in the upper pane with the rules for creating a questionnaire in plain text.

> ***Note****: If you enter the text directly in this text field, you can run the risk of "timing out" as you create your survey. InstantSurvey will not register any activity as you write and may shut down losing your text and requiring you to login again. If possible, have your questions drafted and ready to copy and paste before you begin working in InstantSurvey.*

5. Click **Next** to go to the *Edit Survey* page.

   After completing tasks in the *Quick Question Import* page, you move to the *Edit Survey* page where you can add and edit categories, questions, responses and more. For more information on editing options, see **Edit Survey**.
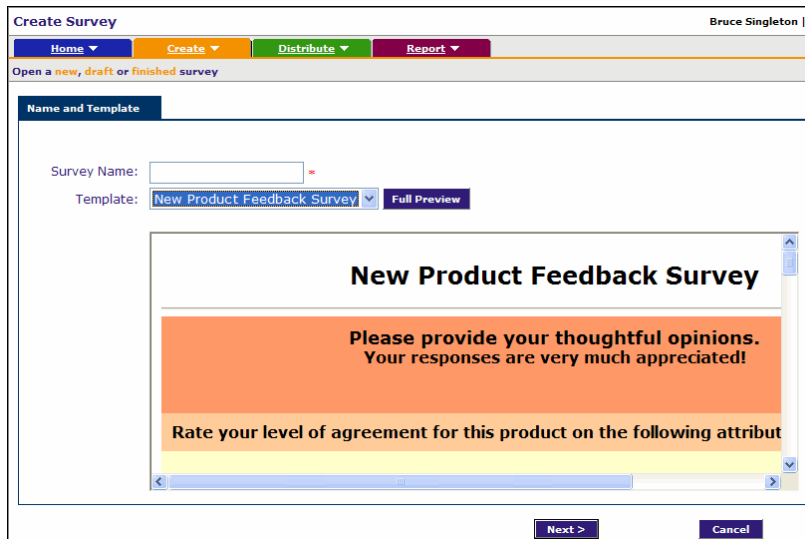
Creating a Survey From a Template

InstantSurvey offers you the option of creating a survey from one of over 40 pre-loaded templates. These templates cover a wide variety of surveys for different business as well as academic needs.

To create a new survey from a template

1. On the *Home* page, click **Create a new survey from a template**. The *Create Survey* page opens.

2. In the *Name and Template* pane, enter a name for your survey in the *Survey Name* field. This is a required field, and you can choose to name your survey as you wish. The name of your survey displays on the *Survey Edit* page in the bar just below the tabs.

> *Hint*: To rename your survey later, use the **Rename survey** ([icon]) icon. A pop up window opens with a **Name** field for the new name, as well as a **Notes** field for entering reason for changing and so forth.

3. From the **Template** drop-down list, select the survey template you wish to use for your study. The survey template names are descriptive.

4. To see the survey template as it will appear to respondents, click **Full Preview**. A separate window opens with the survey.

5. Click **Next.** The *Edit Survey* page opens.

   Once you move to the *Edit Survey* page you can add and edit categories, questions, responses and more. For more information on editing options, see **Edit Survey**.
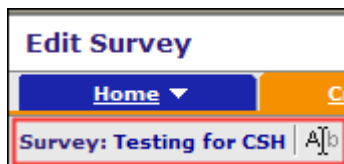
Overview to Edit Survey

Edit Survey opens when you either create a survey from scratch (a blank survey) after the *Quick Question Import* or you use a pre-loaded template to create a survey.

The *Edit Survey* page displays also when you use the **Edit Survey** feature in the *My Surveys* page or you go to copy a previously built survey.

Edit Survey allows you to perform a variety of functions with your survey. InstantSurvey divides the survey into various elements for editing. You can make the following changes in survey elements:

- **Survey Header**

- **Edit the Survey Page**

- **Add Questions**

- **Add Responses**

- **Add Pages**

- **Edit the Thank You Page**.

All surveys consist of questions and responses. Responses are the actual form elements into which answers can be entered: checkboxes, text fields, and so forth. A question may be followed by more than one response, and questions can be grouped into categories and separated into pages. Each page can display optional header information, such as a title and banner logo.

You can add the most important survey elements, questions and responses, directly from the *Edit Survey* page by using the **Add Questions** and **Add Responses** buttons. For more information on editing options, see **Edit the Survey Page**.

This section includes:

- **Introduction to editing page elements**.

Introduction to Editing Page Elements

The page of a survey contains all the elements within a survey: header and banner, questions and responses. When you hover the cursor over any elements within the *Edit Survey* page, a box appears around the different page elements. When you select an element to edit a drop-down list displays on the left with options. See **Edit the Survey Page** for a description of the elements within a page.

Most of these options in the drop-down lists are the same as for editing the survey page. For more information about the various editing options for elements, see **Page Actions**.

Within the page itself are the **Add Response** and **Add Question** buttons. For more information on these features, see **Edit the Survey Page**.
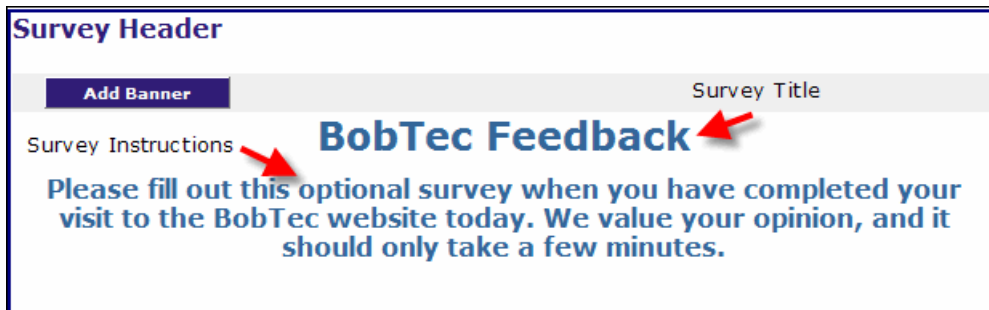
Survey Header

Once you have selected a name and theme and have made selections concerning the *Quick Question Import,* the *Edit Survey* page opens, with various survey elements. The first is the survey header.

The survey header is located at the top of the every survey page. You can edit a page and choose to include the various elements of the header (title, banner, instructions, company).

The survey header consists of:

- **Survey banner**

- **Survey title** (with instructions)

- **Expand all pages**

- **Collapse all pages**

- **Add: Options for survey header** (includes Page, Company and Hidden Response).

Survey Banner

The banner is part of the survey header, and displays at the top of each page of a survey. The banner can be a company logo, for example.

 Here, you can:

- **Add a banner to a survey**

- **Edit a banner**

- **Remove a banner**.
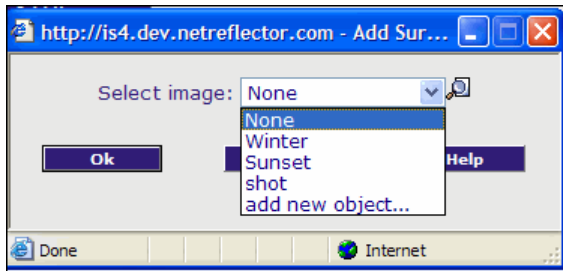
Add a Banner to a Survey

Adding a banner to a survey allows you to customize your survey by inserting a logo or other graphic. You will need to have the images stored in your archive in order to insert them as a banner in your survey.

To add a banner to the survey header

1. In the *Survey Edit* page, go to the *Survey Header* and click **Add Banner**. A pop up window opens.

2. The **Select image** drop-down list contains images in your image archive. Select the image you wish to use as your banner and click **OK**. A new pane opens.

3. (Optional) Use the **Preview** () icon to see what the image looks like after you have selected it and before clicking **OK**.

4. If you have an image, you wish to use as a banner but it is not in your archive, select **add new object**. A pop up window opens with options for loading the image.

See the procedures in the **Edit a Banner** below for more information for using this feature.

> *Note:* The new banner displays as an HTML code field above the header, and displays as an image in the Preview page.

Edit a Banner

This function allows you to make changes to the survey banner.

To edit the survey banner

1. In the *Edit Survey* page, click in the banner portion of the survey. A border appears around the selected banner, and the *Survey banner options* drop-down list appears at the left.

2. Select **Edit** from the drop-down list. If the banner contains graphics, a pane displays informing you about converting the graphics to HTML, with the option to delete the graphic or proceed and convert to HTML.

3. Make a selection from the radio buttons and click **Proceed to editing**. This pane displays the first time you go to edit a banner.
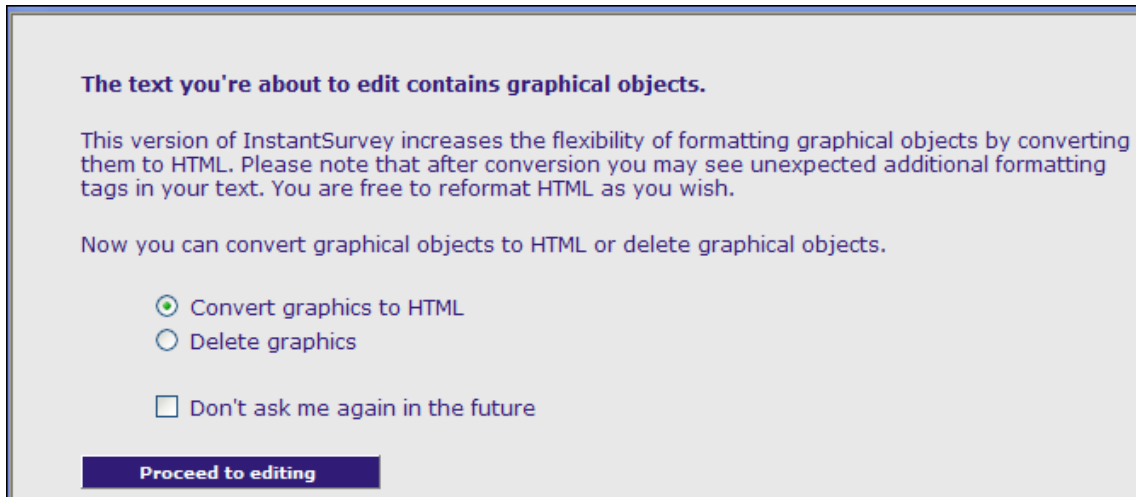
4. The *Banner text* pane displays with the image in a field in which you can enter text.

5. To add new images to your archive, click **Add new** to open a pane for inserting a graphic from the library. The *Objects* pane displays.
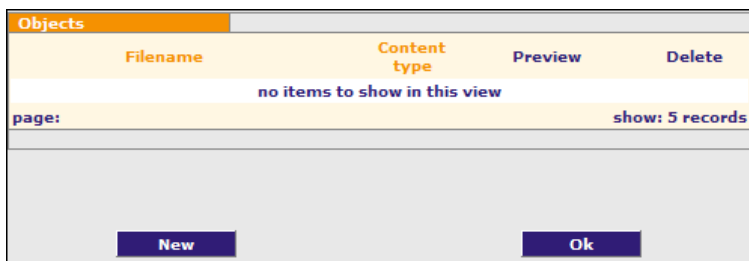
6. If you have no images in your archive, click **New** in this pane. The *Add object to archive* pane opens.

7. Use the browser to select a graphic file from your hard drive, enter a filename, select the type of file, and click **Add**. You return to the *Objects* pane.

8. In the *Objects* pane, click **OK**. The new images display in the *Images* subpane in the *Edit banner* pane.

Remove a Banner

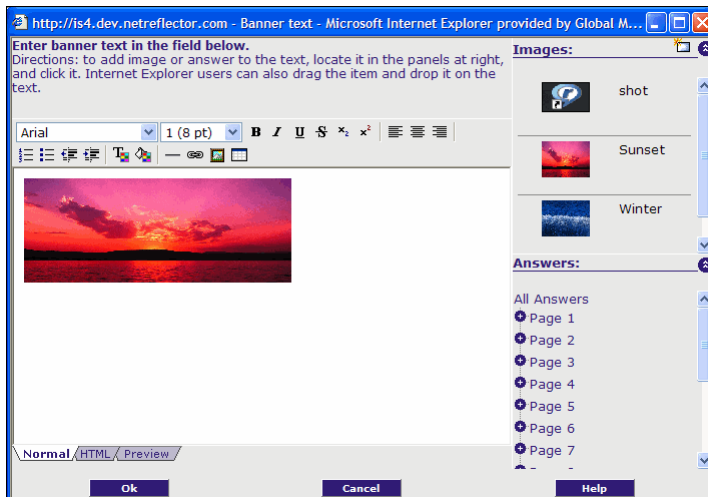This function allows you to remove the survey banner.

To remove a survey banner

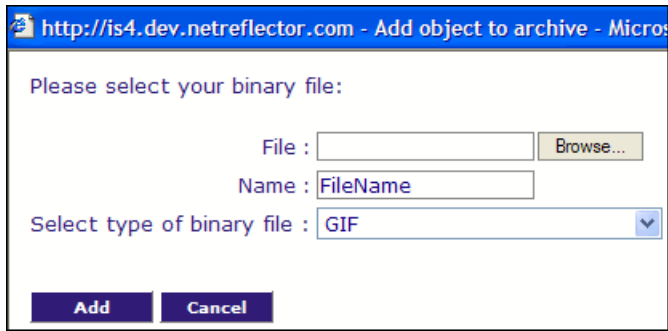1. In the *Edit Survey* page, click in the banner portion of the survey. A border appears around the selected banner, and the *Survey banner Actions* drop-down list appears at the left.

2. Select **Remove** from the drop-down list. A pop-up displays asking to confirm that you wish to remove the survey banner.
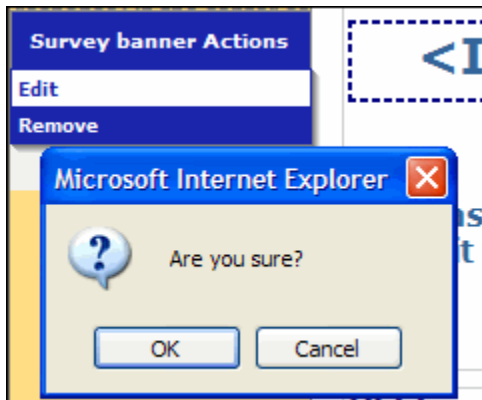
3. Click **OK** to remove.

Survey Title

The *Survey Title* appears at the top of each page of your survey. Editing the survey title provides you with the editing options in the drop-down list on the left when you click the survey header.

Edit Title and Instructions

This option allows you to change the survey header and add or edit any instructions that appear with the header at the top of each page of the survey.

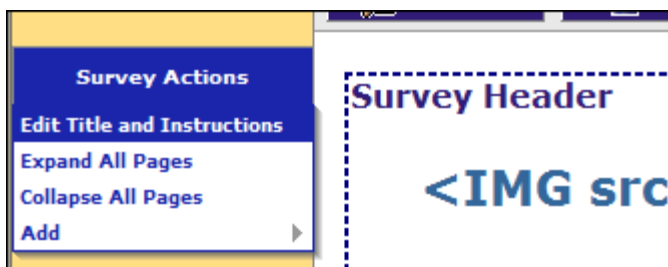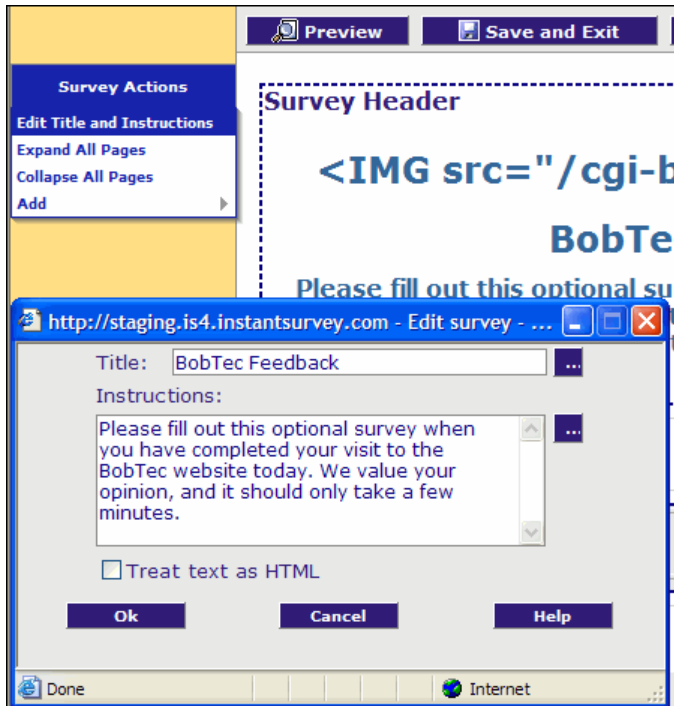**To edit the survey title and instructions**

1. In the *Edit Survey* page, click the in the *Survey Header* pane. The *Survey Actions* drop-down list displays on the left.

2. In the *Survey Actions* drop-down list, select **Edit Title and Instructions**. A pop-up opens.

3. Make any changes in the **Title** and / or the **Instructions** fields. Click **OK** when finished, or **Cancel**.

4. (Optional) Check **Treat text as HTML** if you wish to insert HTML elements in this text.

Expand All Pages

This option allows you to open all survey pages for viewing.

To expand all pages

1. In the *Edit Survey* page, click the in the *Survey Header* pane. The *Survey Actions* drop-down list displays on the left.

2.   Select **Expand All Pages**.

Collapse All Pages

This option allows you to close all open survey pages on the page. When working with long surveys, it is often helpful to collapse pages that are not currently being edited. This makes it easier to focus on a specific part of your survey and increases the performance of the Edit Survey functionality by reducing the amount of text that must be displayed in the browser window.
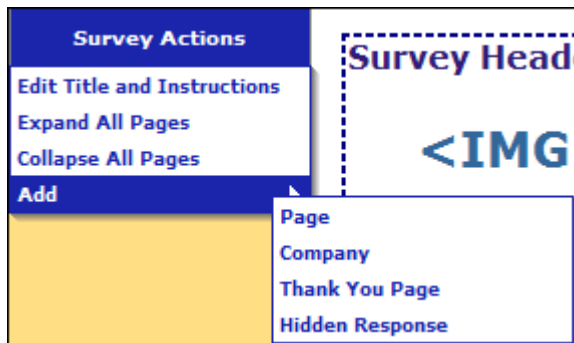
To collapse all pages

1.   In the *Edit Survey* page, click the in the *Survey Header* pane. The *Survey Actions* drop-down list displays on the left.

2.   Select **Collapse All Pages.**

Add Options for Survey Header

The sub options in the *Survey Actions* drop-down list for Add include:

•   **Page**

•   **Company**

•   **Hidden Response**.

Page

Allows you to add a page to the survey. See **Edit the Survey Page** for more information.

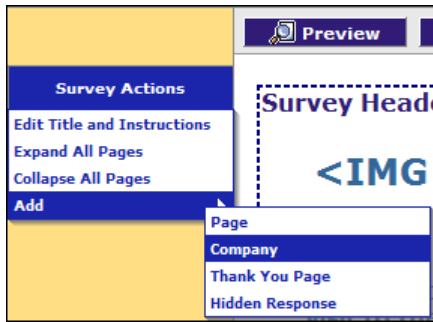### Company: Add, Edit and Remove

This allows you to add the name of a company in a separate pane below the *Survey Header* pane.
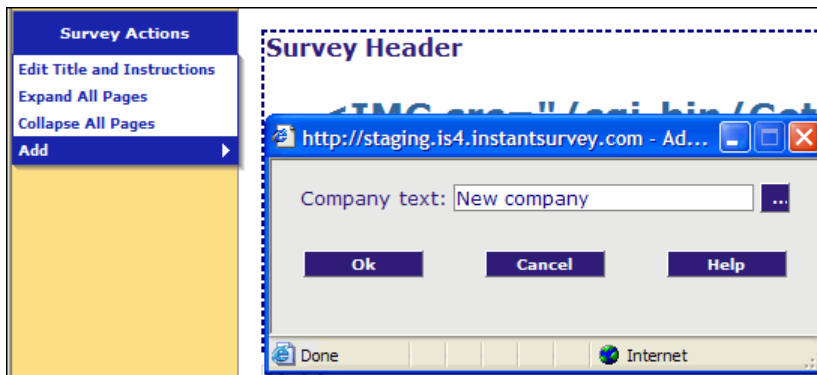
To add a company name to the survey

1.   In the *Edit Survey* page, click the in the *Survey Header* pane. The *Survey Actions* drop-down list displays on the left.

2.   In the drop-down list, select **Add**. From the sub options under **Add**, select **Company**.

3. A pop-up window displays with a **Company text** field.

4. Enter the company name and click **OK**. The new company name displays below the *Survey Title* and will appear there within the survey header on every page in which you choose to include it.

5. Optional:

    o **Edit**: To edit the company name, click in the *Company* pane, select **Edit** from the *Company Actions* drop-down list on the left, and edit in the pop-up window, which displays.

    o **Remove**: To remove the company name, click in the *Company* pane, select **Remove** from the *Company Actions* drop-down list on the left. A pop-up window displays asking to confirm your removing the company name. Click **OK**.

    o Click the **Advanced Editing** () icon to see more options for formatting the company name. For more information on advanced editing features, see **Advanced Editing**.

Hidden Response

This feature allows you to add a hidden response to the survey. Hidden responses help you to match pre-loaded data characteristics with respondents. These responses allow you to match information about respondents with other information, such as region, zip code, or other qualifiers about the respondents. See *Mail Merge and Pre-loaded Data* in the "Distribution" document for more information on pre-loaded data.

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For example, suppose in your respondent data base, you have a record for where the respondent lives, based on region. Each region has a specific digit associated with it: East = 1, West = 2, Midwest = 3. When you pre-load data about the respondents, these "tags" appear. When the respondents take the survey, you can then tally how many came from each region. The respondents do not see this matching--thus, "hidden" response.

To add a hidden response to a survey

1. In the *Edit Survey* page, click in the *Survey Header* pane. The *Survey Actions* drop-down list displays on the left.
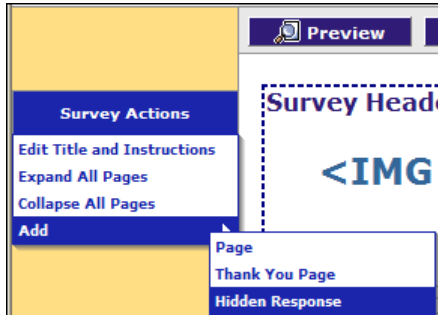
2. In the drop-down list, select **Add**. From the sub options under **Add**, select **Hidden Response**. A pop-up window displays.
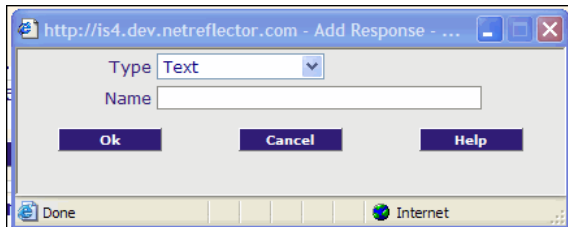
3. In the pop-up window:

   a. Make a selection in the **Type** drop-down list from:

   - **Text**: Enter text in the **Name** field.

   - **Single Numeric**: Opens a text field with **Quick** and **Advanced** tabs on the bottom. Use **Advanced** to add characteristics that match to a single number for radio button responses. For more information on numeric values, see **Survey Data Structure**.

- **Multiple Numeric**: Opens a text field with **Quick** and **Advanced** tabs on the bottom. Use **Advanced** to add characteristics that match to a single number. Multi numeric hidden responses allow you to map a respondent to multiple elements / values, similar to a check box response.

b. In the **Name** field, enter a name for the hidden response.

c. Click **OK**. The resulting hidden response displays below the *Survey Header.*

Survey Page

This option allows you to make changes or additions to a page in the survey. Make sure that the survey page you wish to see displays on the page. Use the **Expand** option in the *Page Actions* drop-down list to make sure the page is completely visible.
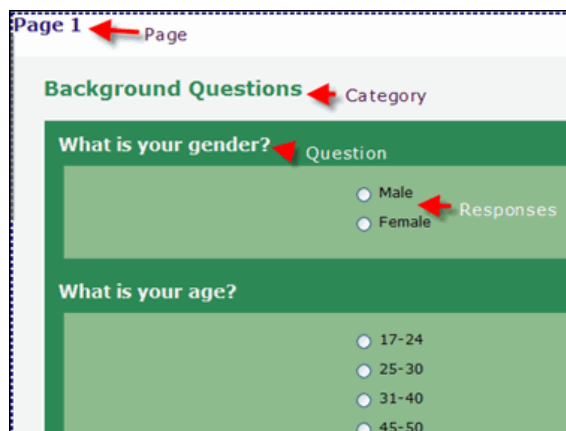
A page consists of four elements:

* **Category**

* **Add question**

* **Add response**

* **Add page**

See also:

* **Survey data structure**.

There are two options for editing a survey page: buttons within the pane, and a drop-down list that displays on the left when you click in a survey element.

* **Buttons**: The buttons **Add Question, Add Response** and **Add Page** are located within the *Page* pane.

* **Drop-down List**: The *Page Actions* drop-down list displays when you click within the *Page* pane. See **Page Actions: Options**.

Category

Categories serve as a way to group your questions and response options into groups with the same general theme. The category displays at the top of the page above the group of questions. To add a category, you can use the side drop-down list as described in **Add Category** .

Add Question

This feature allows you to add a question to the survey**.** It is located at the bottom of each page on the *Edit Survey* page.

Note: When you add a question, a response or choice of answers does not automatically appear. The **Add Response** button appears after you have added a question*.* Click **Add Response** in the pane to create a response to the new question.

To add a question using the button in the pane

1. In the *Edit Survey* page, go the *Page* pane and click **Add Question**. A pop-up window displays.

2. In the pop-up window:

   a. In the **Question Title** field, enter a name for the question. This is the actual question itself, such as "How did you like our service?".
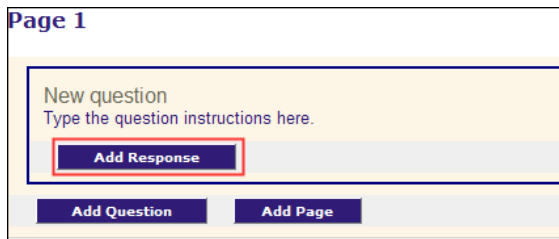
   b. In the **Instructions** field, enter the question instructions. This can include something like "Select one" or "Check all that apply".

   c. Click **OK**. The new question displays on the page, along with the **Add Response** button.

3. (Optional) For more features in the question, click the **Advanced Editing** (⬚) icon. For more information about all that you can do with this feature, see **Advanced Editing**.
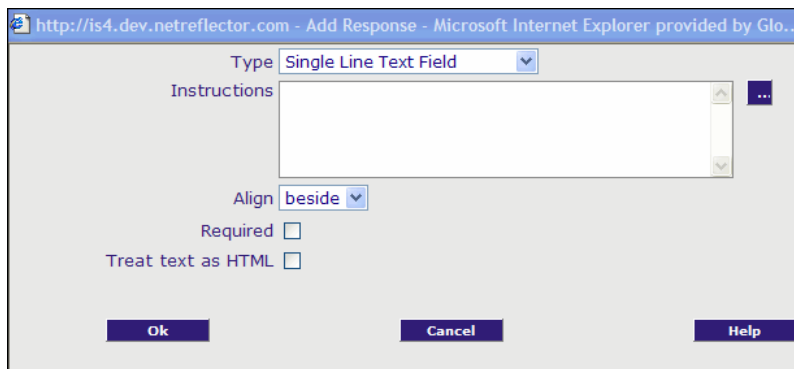
Add Response

Once you have added a question, you will need to add response options for your survey takers to answer the question.

To add a response to a new question

1. To add a response to the new question, click **Add Response** in the *Edit Survey* page**.** A pop-up window displays.

    *Note: Remember, the **Add Response** button displays after you have first added a question.*
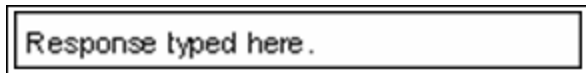
2. Select from options for the **Type** of response. The options in the lower part of the pop-up window will change according to the **Type** option you select. These **Type** options include:

    o **Single Line Text Field**

    o **Multiple Line Text Field**

    o **Radio Buttons – Vertical**

    o **Radio Buttons – Horizontal, End Point Labels**

    o **Radio Buttons – Horizontal, All Point Labels**

    o **Matrix Tables**

    o **Checkboxes**

    o **Drop Down Select List**

- o **Constant Sum**
- o **Rank Order Scale**.

Single Line Text Field

This feature creates a response that presents a text input into which respondents can type a single line of text up to 250 characters long.

> Response typed here.

To create a single line text field response

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select **Single Line Text Field**.

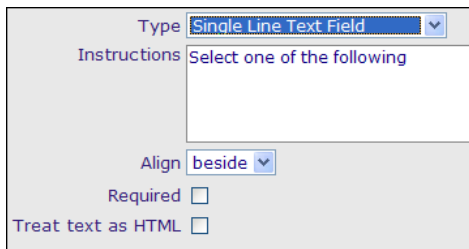|	
Type	Single Line Text Field
Instructions	Select one of the following
Align	beside
Required	☐
Treat text as HTML	☐

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

- o **beside**: Places instructions to one side of the text field.
- o **above**: Places instructions above the text field.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

7. Click **OK**.

Multiple Line Text Field

This feature creates a response that presents a larger text input field into which respondents can type extended information (usually used for a "comments" field).

> Text field here is bigger, allowing
> respondents to see more of their text.
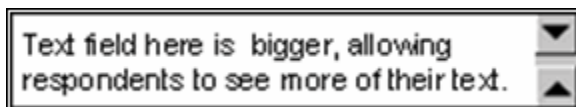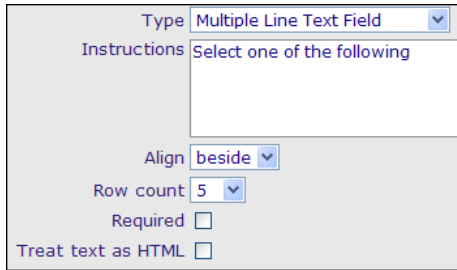
To create a multiple line text response

1. Go to the *Edit Survey* page, and click **Add Response**.

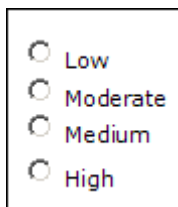2. From the **Type** drop-down list, select **Multiple Line Text Field**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

    o   **beside**: Places instructions to one side of the text field.

    o   **above**: Places instructions above the text field.

5. Select a number of rows from **Row count** (1-99). This is the number of rows you can put into the open text field, and determines the height of the text field. Character limit is 250.

6. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

7. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

8. Click **OK**.

Radio Button(s) – Vertical

This feature creates a response that presents a set of choices from which respondents can select only one answer. All choices are aligned vertically.

To create a response with vertical radio buttons

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select Radio Button**(s)- Vertical**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

    o   **beside**: Places the instruction text to the left of response options.

    o   **above**: Places the instruction text above the response options.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. In the text field below **Required**, enter the text labels of response choices.

    o   Use the **Quick** option to see text as to copy and paste an entire list of choices.

    o   Use the **Advanced** option to see the *Element* and *Value* functions. Click **add new** to insert a new label and value. Use the **delete** icon on the far right to remove the new field. Advanced mode allows you to edit each item individually, rearrange them, and assign numeric values. For more information on numeric values, see **Survey Data Structure**.

7. Place a check in the checkbox to select **Other (please specify)** to indicate where a respondent may enter a response not listed. In the **Value** field to the right, a numeric value displays and a text box will be created for the specified response. This response displays in the survey as an option with a text field.

8. Place a check in the checkbox to select **N/A** for respondents to indicate that none of the radio buttons apply. In the **Value** field to the right, a numeric value displays allowing the response to be eliminated from reports. This response displays in the survey at the end of the response options for this question.

○ N/A

9. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

10. Click **OK**.

Radio Buttons - Horizontal End Point Labels

This feature creates a response that presents radio button choices from which respondents can select only one answer. All choices are aligned horizontally. This is useful for creating responses in which you wish survey takers to rate something on a scale.

Low	○	○	○	○	High
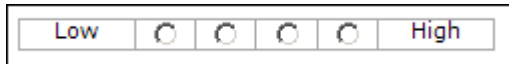
To create a response with horizontal radio buttons and end point labels

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select **-Horizontal, End-Point Labels**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

   o **beside**: Places the instruction text to the left of response options.

   o **above**: Places the instruction text above the response options.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. In the text field below **Required**, enter the text labels of the response choices. For this type of response, the number of returns, plus the endpoint labels themselves, creates the number of radio buttons between the end point labels.

    For example, to have four radio buttons between the endpoint labels, enter the first end point label, press **Enter** twice, and then enter the final end point label.

    o   Use the **Quick** option to copy and paste an entire list of choices.

    o   Use the **Advanced** option to see the *Element* and *Value* functions. Click **add new** to insert a new label and value. Use the **delete** icon on the far right to remove the new field. Advanced mode allows you to edit each item individually, rearrange them, and assign numeric values. For more information on numeric values, see **Survey Data Structure**.


7. Place a check in the checkbox to select **N/A** for respondents to indicate that none of the radio buttons apply. In the **Value** field to the right, enter a numeric value allowing the response to be eliminated from reports.

8. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.
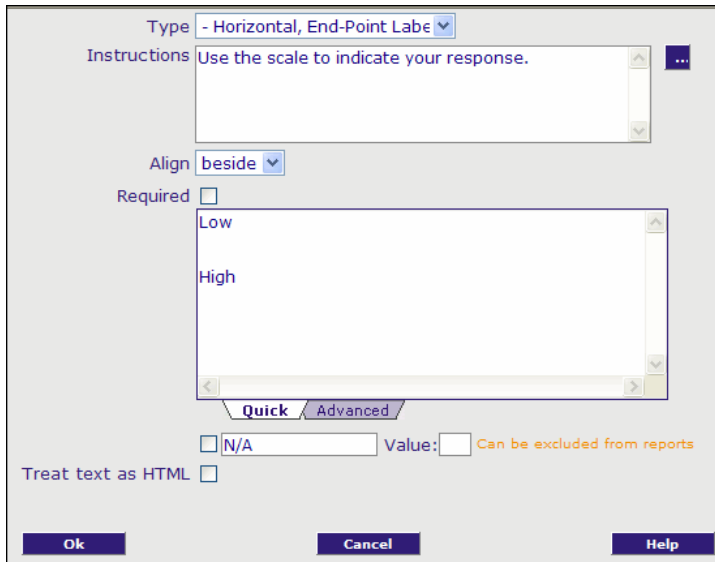
9. Click **OK**.

Radio Buttons - Horizontal, All-Points Labels

This feature creates a response that presents radio buttons aligned horizontally with a label created above each button.

To create a response with horizontal radio buttons with labels on all points

1. Go to the *Edit Survey* page, and click **Add Response**.

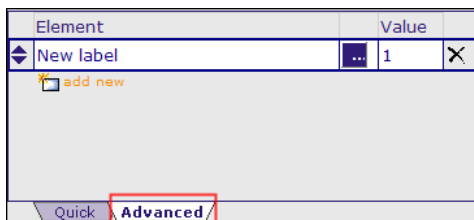2. From the **Type** drop-down list, select **-Horizontal, All-Point Labels.**

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

   o **beside**: Places instructions to one side of the text field.

   o **above:** Places instructions above the text field.

5. In the text field below **Required**, enter the text labels of response choices.

6. See the explanation above in **Radio Buttons**- **Horizontal, End-Point Labels** for the rest of the functions.

Matrix Tables

This feature creates a response that presents a grid with the same set of choices for several questions, usually for rating several items using the same scale. Responses for each row can be either single-choice radio buttons or multi-choice check boxes.

To create a response using a matrix table

1. Go to the *Edit Survey* page, and click **Add Response** after adding a question.

2. From the **Type** drop-down list, select **Matrix table**. See **Add a Question** for more information.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

   o **Left**: Places the instruction text to the left of the page, aligned with the responses.

   o **Center**: Places the instruction text in the center of the response area.

5. Place a check in the checkbox next to **Banded** for shading to appear in alternating rows.

6. Make a selection from the **numbering** drop-down list for different styles of numbering the response elements.

7. Make a selection from **Repeat header after** # **rows** to have the header repeat for ease of use in longer responses.

8. *Rows*: Create the response choices. Presents two options.

   o Use the **Quick** option tab to write in or copy and paste an entire list of row text.

   o Use the **Advanced** option tab to edit each item individually, rearrange them, and select which rows the respondent is required to answer.
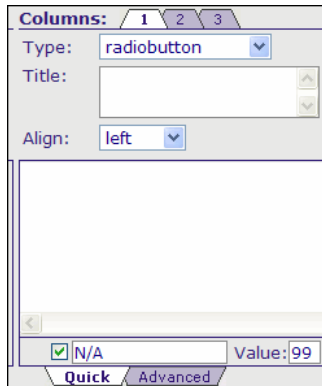
9. *Columns*: Presents different options for the types of response choices.
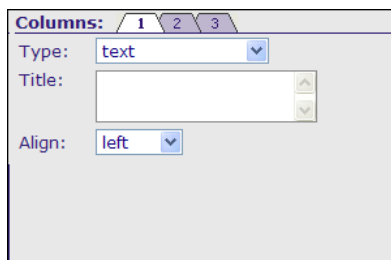
   Note: *With InstantSurvey, you can only use the first numbered tab of columns.*

   a. From **Select Table Type**, select **radiobutton**. Respondents can only enter one response. This inserts a checkbox at the bottom of the section which, when selected, indicates **N/A** and a **Value** field.

   - In the text field, enter a title to go above the column of radio buttons.

   - Use the **Quick** option tab to write in or copy and paste an entire column of choices.

   - Use the **Advanced** option tab to edit each item individually, rearrange them, and assign numeric values.

   b. From **Select Table Type**, select **checkbox** to insert checkboxes. The text field below does not change. The **N/A** and **value** field do not display.

   c. From **Type** drop-down list, select **text** to allow a text response option for each item displayed in your rows. The text field below disappears.

   - In the **Title** field, you can provide a column header title related to the content you want entered into the open text boxes.

10. Click **OK**.

Checkbox(es)

This feature creates a response that presents respondents with multiple options, from which they can select multiple answers.

To create a response using checkboxes

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select **Checkbox(es)**.

3. Enter any other instructions in the **Instructions** field.

4. From **Align**, select:

   - **beside**: Places the instruction text to the left of response options.

   - **above**: Places the instruction text above response options.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. Select the number of columns from the **Number of columns** drop-down list (1-4). This is the number of columns in which the checkboxes display.

   o Use the **Quick** option tab to you to copy and paste an entire list of choices.

   o Use the **Advanced** option tab to you to edit each item individually, rearrange them, and assign numeric values.

7. Place a check in the checkbox to select **Other (please specify)** to create a single line text field and indicate where a respondent may enter a response not listed. In the **Value** field to the right, a numeric value displays and a text box will be created for the specified response.

☐ Other (please specify) [   ]

8. Place a check in the checkbox next to **None of the above** to indicate where a respondent may show that none of the response options apply. In the **Value** field to the right, a numeric value displays—all other choices that may have been entered for this response will be cleared if the respondent selects this answer.

☐ None of the above

9. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

10. Click **OK**.

Drop Down Select List

This function allows you to create response options as a drop-down list, from which respondents can only select one answer.

[Oranges ▼]

To create a response with a drop-down list

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select **Drop Down Select List**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

    o   **beside**: Places the instruction text to the left of the response option.

    o   **above**: Places the instruction text above the response option.

5.   Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6.   In the text field below **Required**, enter the text labels of response choices.

   o   Use the **Quick** option tab to write in or copy and paste an entire list of choices.

   o   Use the **Advanced** option tab to see the *Element* and *Value* functions. Advanced mode allows you to edit each item individually, rearrange them, and assign numeric values. Click **add new** to insert a new label and value. Use the **delete** icon on the far right to remove the new field.

7.   Place a check in the checkbox to select **N/A** for respondents to indicate that none of the radio button responses apply. In the **Value** field to the right, a numeric value displays allowing the response to be eliminated from reports.

8.   Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

9.   Click **OK**.

Constant Sum

This function allows you to create response options in which respondents enter values for each choice that must add up to a total value that you specify when you create the survey. If the response is marked as required, respondents will not be able to advance to the next page until the *Remaining Value* field reads zero.

Use this function to create responses in which the "score" must tally to a certain figure (usually 100). This function is useful when survey takers must enter certain percentages in a response, which must then add up to 100%.

Response 1		20
Response 2		10
Response 3		40
Response 4		0
	Remaining Value	30

To create a response with a constant sum

1.   Go to the *Edit Survey* page, and click **Add Response**.

2.   From the **Type** drop-down list, select **Constant Sum**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

   o **left**: Places the instruction text above and left-aligned with the response options.

   o **center**: Places the instruction text above and centered in the response area.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. Enter a figure in **Total sum** for the appropriate tally in your response.

7. In the text field below **Total sum**, enter the text labels of response choices.

   o Use the **Quick** option tab to write in or copy and paste an entire list of choices.

   o Use the **Advanced** option tab to see the *Element* and *Value* functions. Click **add new** to insert a new label and value. Use the **delete** icon on the far right to remove the new field. Advanced mode allows you to edit each item individually, rearrange them, and assign numeric values.

8. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

9. Check **OK**.

Rank Order Scale

This function allows you to create response options in which respondents assign numeric rankings to the response choices with drop-down lists. Users are prohibited from assigning the same ranking more than once. If the response is marked as required, respondents also will be prohibited from leaving choices unranked.

Use this function to create a response in which survey takers can answer and rate, in order, the importance of their response. The response options in the drop-down list will be equal to the number of response texts: if you have five factors you wish respondents to put in order of importance, then the drop-down lists will have choices of 1,2,3,4, and 5.

Response Text	1 ▼
Response Text	2 ▼
Response Text	4 ▼
Response Text	Choose one ▼

To create a response with a rank order scale

1. Go to the *Edit Survey* page, and click **Add Response**.

2. From the **Type** drop-down list, select **Rank order scale**.

3. Enter any instructions in the **Instructions** field.

4. From **Align**, select:

   o **left**: Places the instruction text above and left-aligned with the response options.

   o **center**: Places the instruction text above and centered in the response area.

5. Place a check in the checkbox next to **Required** if you wish to make this a required response. A required response is one in which a survey-taker must answer before they can continue with the survey.

6. In the text field below **Required**, enter the text labels of response choices.

   o Use the **Quick** option to copy and paste an entire list of choices.

   o Use the **Advanced** option to see the *Element* and *Value* functions. Click **add new** to insert a new label and value. Use the **delete** icon on the far right to remove the new field. Advanced mode allows you to edit each item individually, rearrange them, and assign numeric values.

7. Place a check in the checkbox next to **Treat text as HTML** if you wish to insert HTML elements in this text.

8. Click **OK**.

Add Page

Pages can contain only one question or many questions, but keeping one question per page can often make the process easier for conditional branching.

Use the **Add Page** function to insert a page into the survey.
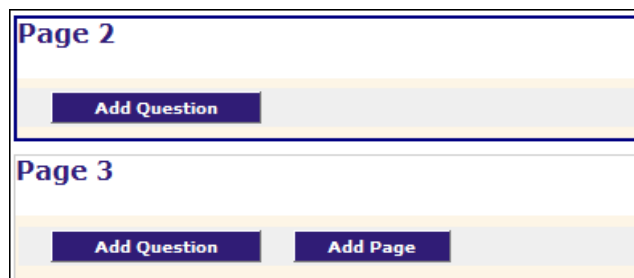
To add a page into a survey

1. In the *Edit Survey* page, go to the *Page* pane.
2. Click **Add Page**. A new page displays below the most recent page.

Survey Data Structure

Responses make up the key data in any survey. In order to help manage the data, InstantSurvey creates a data structure in which responses are assigned both variable names and numeric response choice values.

InstantSurvey does not require users to be concerned with the underlying data structures of a survey in order to carry out a successful project. However, for users doing advanced survey programming, offline data processing or application integration, InstantSurvey provides control over the following data elements:

*   **Response Variable Names**: This feature is used in *Edit Survey* in the **More actions** drop-down list for the **Edit Script** option.

*   **Response Choice Values**: When you go to add different response types, you often see the **Advanced** tab below the text field. Click that tab to see where you can assign the value. For more information about the response choice values when adding responses, see **Add Response**.

Response Variable Names

All survey response elements store answer data in one or more variables. InstantSurvey automatically assigns sequential variable names to your responses (Q1, Q2, etc.), but you can change these to custom names, such as "first name", "age", etc.

Variable names provide an easy way to keep track of the elements of your survey, and to refer to them in branching, piping, preloading, mail merge, and reporting.

To view and change a variables name

- On the *Edit Survey* page, under the **More actions** drop-down list, use the **Edit Script** option. For more information, see **Edit Script**.
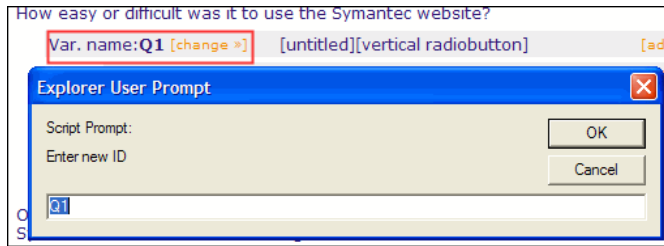
Other key features of variable names:

- InstantSurvey's default numeric variable names are "floating"—they change as you add, remove or reorder response elements in order to remain in sequential order.

- Custom variable names are "fixed" that is, they will not change as you add, remove or reorder response elements.

- Variable names need to be unique within a survey, but the same variable names can be used in multiple surveys. If you try to change a variable name to one that is already in use, a number will be appended to the name.

- Custom variable names are retained when you save survey elements as mini-templates.

Response Choice Values

InstantSurvey assigns a numeric value to each choice of multiple-choice responses. By default, choice lists are numbered sequentially from top to bottom starting from 1, but these values can be customized when you create your survey.

For example, the table below shows the default numeric equivalents for a three-choice list.

Choices user sees	Numeric equivalent
Yes	1
No	2
N/A	99

Numeric values for answer choices are automatically set in the *Edit Survey* functionality. The values default to the first choice = 1, second choice = 2, and so on. Another example shown below would be the default if response choices are entered and presented in the following order:

Choices user sees	Numeric equivalent
Strongly Agree	1
Agree	2
Neutral	3
Disagree	4

Choices user sees	Numeric equivalent
Strongly Disagree	5

To reverse the values during survey design, you would simply change the values. However, if data has already been collected, you MUST NOT change these values. This is because only the numeric values are stored in the database. The label-to-value association is stored only in the Survey XML and this XML is also used for reporting. If Respondent # 1 answered Strongly Agree, InstantSurvey will store a 1. If the meaning of 1 is changed to Strongly Disagree, the numeric value in the database will not change, so the meaning will be incorrect in the reports.

Page Actions: Options

To see other options for editing the survey page

- Click within the page to see the **Page Actions** drop-down list of selections display on the left.
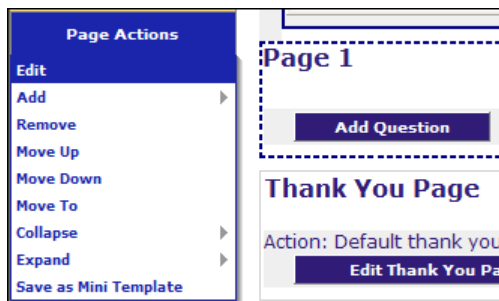
This section includes:

- **Edit option**

- **Add option** (with various sub options)

- **Remove option**

- **Move up option**

- **Move down option**

- **Move to option**

- **Collapse option**

- **Expand option**

- **Save as mini template option**.

Edit Option

Selecting the **Edit** option displays a pop up window with functions, which allow you to add or delete elements from the page, select the survey language and make edits to survey options.

The sub-topics are:

- **Edit page**

- **Changing to a foreign language on the page**

- **Change the language of the entire survey**

- **Edit category**

- **Edit question**

- **Edit response**

- **Edit branch**

- **Edit email alert**

- **Edit text block**.

Edit page

The **Edit Page** option allows you to make changes to the survey page.
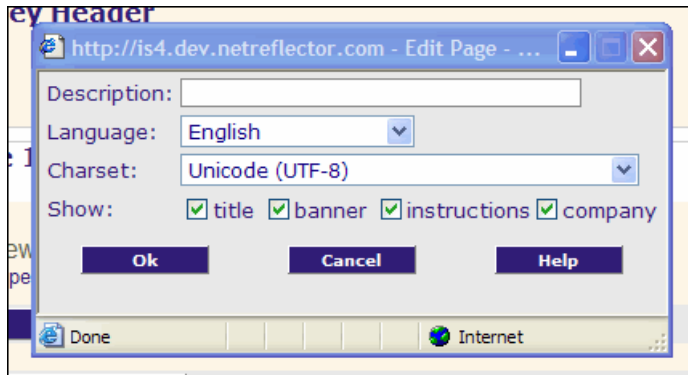
To edit the survey page

1. On the *Edit Survey* page, click in the page you wish to edit.

2. Make selections and entries in the following fields:

- **Description**: Use to enter a description of the page content for your own reference.

- **Language**: Allows you to select from a variety of languages. Default is English.

- **Charset**: Allows you to select from a range of charsets. Default is Unicode (UTF-8). Depending on the language you select, the **Charset** automatically selects to support that language.

- **Show**: Place a check next to the elements you wish to display in the survey page header. To remove elements from the page header, de-select the element by removing the check in the checkbox next to it.

Changing to a Foreign Language on the Page

You may find it useful to be able to change the language of a particular page, especially if you use branching in which you ask the respondent to specify their language from a range of options. For example, you may have a question such as "Which language do you speak?" followed by radio button responses. Depending on the response, a page in the appropriate language would open. For more information about branching, see **Add Branch** .

To change the language of a page in the survey

1. On the *Edit Survey* page, select **Edit Appearance** from the **More actions** drop-down list. The *Edit survey appearance* page opens.

2. In the *Survey appearance* pane, de-select **Override language settings for all pages**.

3. Click **Save** at the top of the page. You return to the *Edit Survey* page.
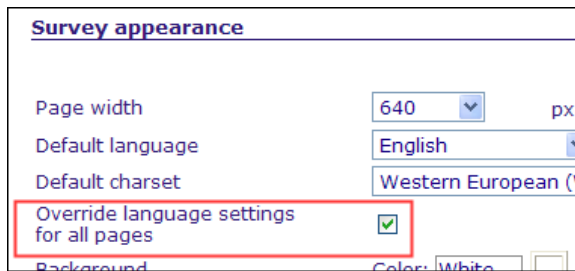
4. Click within the *Page* pane. The **Page Actions** drop-down list displays on the left.

5. Select **Edit**. A dialog box opens.

6. Use the **Language** drop-down list to select the language for the page.

7. Click **Ok**.

> ***Note***: The option to select a foreign language for a page does not mean that InstantSurvey will automatically translate or begin writing in that font. The selection of a foreign language and/or font at this point enables InstantSurvey to support that language and font. You must make sure that your own computer is set to type in the language and font you select, independent of InstantSurvey.

Change the Language of the Entire Survey

For more information about changing the language for the entire survey, see the **Default language** discussion in **Survey Appearance**.

Edit Category

Editing and adding for this element are very similar. See the **Category** section for more information.

Edit Question

Editing and adding for this element are very similar. See the **Add Question** section for more information.

Edit Response

Editing and adding for this element are very similar. See **Add Response** for more information.

Edit Branch

To edit a branch

1. Click within the branch. The **Branch Actions** drop-down list displays.

2. Select **Edit**. The *Edit Branch* window displays, with the values for the branch in the various fields.

3. Make changes as needed and click **Ok**.

   For more information on creating branches, see **Add Branch** .

Edit Email Alert

To edit an email alert

1. Click within the alert. The **E-mail alert Actions** drop-down list displays.
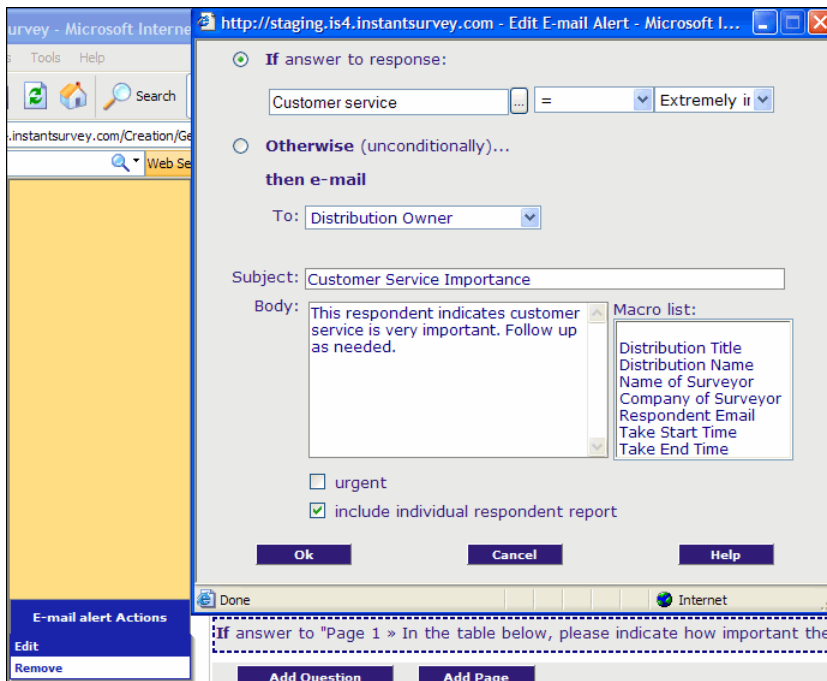
2. Select **Edit**. The *Edit E-mail Alert* window opens.

3. Make changes in the various fields as necessary and click **OK**.

    For more information about e-mail alerts, see **Add an Email Alert** .

Edit Text Block

Editing and adding for this element are very similar. See **Add Text Block** for more information.

Add Option

The **Add** selection allows you to insert elements and other functions into a survey and contains sub options in a separate drop-down list.
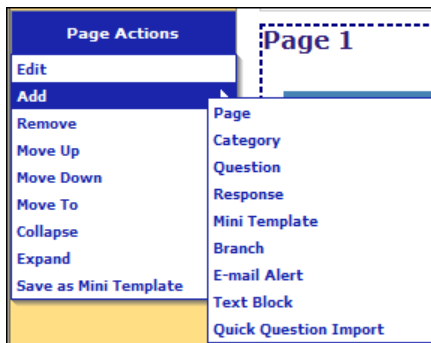
The sub-topics are:

*   **Add page**

- **Add category**

- **Add question**

- **Add response**

- **Add mini template**

- **Add branch**

- **Add an email alert**

- **Add text block**

- **Add quick question import** .

Add Page

The **Page** option allows you to insert a page into the survey. See the discussion of the **Add Page** function.

Add Category

The **Category** option allows you to add category headings to your survey to organize groups of related questions. Selecting this option displays a pop up window.
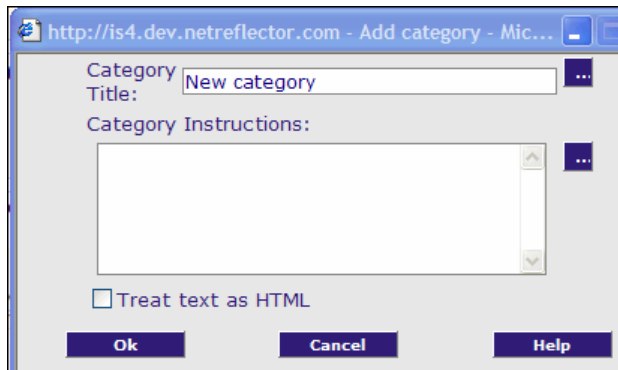
To add a category to a survey page

1. On the *Edit Survey* page, click within the page to which you want to add a category.

2. Select **Add**, then **Category** from the drop-down list on the left. A pop-up window opens.

3. Make selections and entries in the following:

    o **Category Title:** Enter the category name here.

    o **Category Instructions:** Enter instructions for in the text field.

    o **Treat as HTML**: Select this option if your text contains HTML elements.

    o **Advanced Editor**: Click the **Advanced Editor** (⬚) icon for more options in the title or instructions. See **Advanced Editing** for more information.

Add Question

The **Question** option allows you to insert a question on the survey page. See **Add Question** for more information.

Add Response

The **Response** option allows you to insert a response in the page. See **Add Response** for more information.

Add Mini Template

The **Mini Template** option allows you to enter a mini template into the page. Mini templates are reusable subsections of surveys. They can consist of anything from a single response to entire pages of related questions. Selecting this option displays a pop up window.
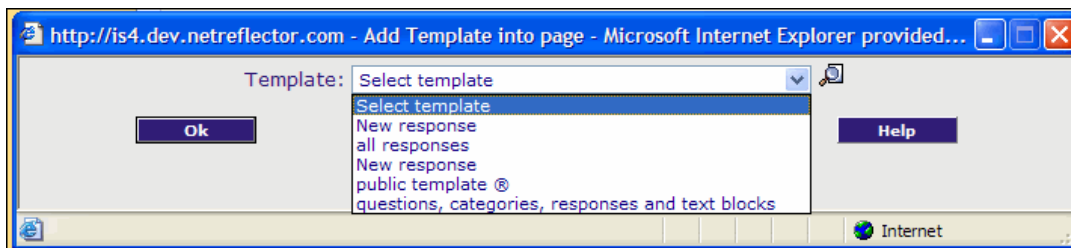
To add a mini template

1. On the *Edit Survey* page, click within the page to which you wish to add a mini template.
2. From the drop-down list on the left, select **Add** and then **Mini Template**. A pop-up window opens.
3. Make selections from the **Template** drop-down list. See *Creating a Mini Template* below for more information on where these options come from.

Creating a Mini Template

You create Mini Templates by selecting elements of an existing survey and saving it to your Mini Template library. Mini templates allow you to save and re-use content in survey elements to conveniently create new surveys.

To create a mini template

1. In the *Edit Survey* page, click the element you wish to save as a mini template—in this case, the *Page* element pane.
2. Select **Save as Mini Template** in the *Page options* drop-down list on the left. A pop up window displays with a field for the template title.
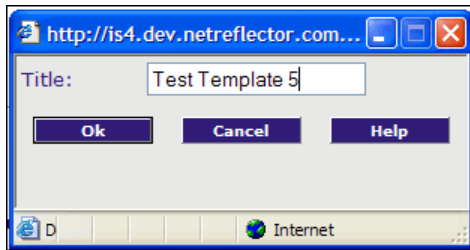
3. You now have the opportunity to name the element as a Mini Template. To change the name of an element you have just created, simply highlight the text and delete it, then type a new name.

4. **Click OK** when finished. The element is added to the **Mini Template** info panel for you to use with any survey. The mini template now appears as an option in the **Template** drop-down list when you go to add a mini template to a survey.
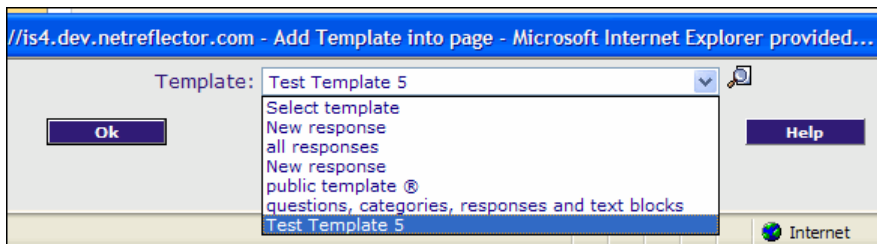
5. (Optional) To rename or delete a Mini Template, select **Templates** from the **Create** menu, then click the **Rename** (᷄) icon or **Delete** (✕) icon next to the item in **Your Mini Templates** list. Once the content of the Mini Template is copied to a survey, it can be edited without affecting the original Mini Template or any other survey where is used.

> *Note: Any edits or deletions to Mini Templates will not affect surveys in which they were used previously.*

Add Branch

The **Branch** option allows you to enter a branch to a response. A branch is an instruction to route your respondents to a different page based on their response to a previous question. Selecting this option displays a pop up window.
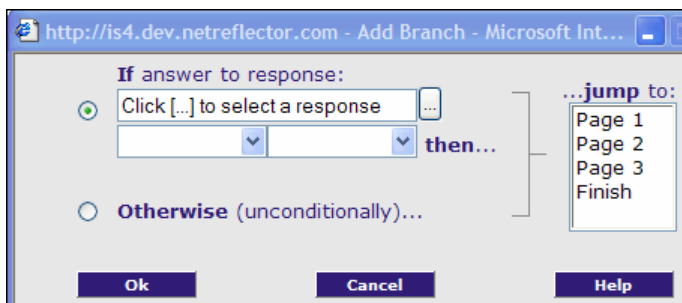
Conditional Branching

Conditional branching allows respondents that answer differently to be routed to different pages. Branching is accomplished using if, then, else logic and allows the surveyor to route respondents to different questions based on their specific answers to a question. It is used to help individualize a survey, and to collect data specific to individual respondents. Branching may also occur based upon a response made previously in a survey.

Simple Branching Example

A surveyor wants to branch respondents depending on whether or not they have children. The surveyor first asks respondents if they have children. For this example, possible responses are *Yes* or *No*. If a respondent answers *Yes*, they continue to the question, How many children do you have? If the respondent answers *No* to having children, they will skip the question, How many children do you have? and branch to another set of questions. In other words, if a user answers *No*, then they branch, and if they answer *Yes*, they continue to the next question.

> **Note:** *If you choose to display a Progress Bar in your survey, it will always reflect the respondent's absolute position among the total number of survey pages. For example, if branching causes the respondent to jump from page 2 to page 8 of a 10-page survey, the Progress Bar will jump from 20% to 80%.*

Add a Conditional Branch

To direct different response items to a different question, all jumps must be created separately. Jumps are created using branches. After a branch is created and the survey page displays follow the same steps to create another branch for the same question.

Branches should be created only after you have created the responses that they are based on and created the pages that users will jump to. You cannot create a branch to a page that has not yet been created.

A conditional branch can be created if you want to direct the respondent to a particular page based on a given response. Conditional branching does not change the content of the survey – it just routes the respondents to a specific page(s) based on conditional logic.

To add a conditional branch

1. In the *Edit Survey* page, click **the page you want to branch**.
2. In the **Page Actions** drop-down list, click **Add**.
3. Select **Branch**. A dialog box opens with the IF condition field.
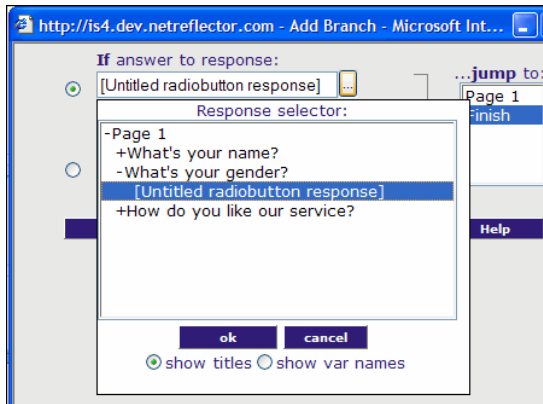
4. Click the ellipsis (⬚) button to select the desired response. The *Response selector* pop-up window opens.

5. Drill down to the appropriate response (**go to** [*untitled radio button response*]) and then click **OK**. A drop-down list of responses becomes available.

6. Select the desired response. The condition is now defined by the particular question and the desired response.

7. Click the **...jump to** drop-down list to select the page where you want the survey to jump to if the condition is met.

8. (Optional) Select **Otherwise (unconditionally)** if you wish to move respondents to a page without specifying a response requirement. This is usually used when another branch or branches specify other respondent destinations based on other responses.

9. Click **OK** when done.

Add an Email Alert

The **E-mail Alert** option allows you to insert an email alert on a survey page. E-mail alerts allow survey responses to trigger immediate e-mail messages to you, the survey respondent, or any other address. For more information, see the procedure for creating email alerts, below. Selecting this option opens a pop up window.

E-mail alerts allow survey responses to trigger immediate e-mail messages to you, the survey respondent, or any other address. This supports a number of common business scenarios:
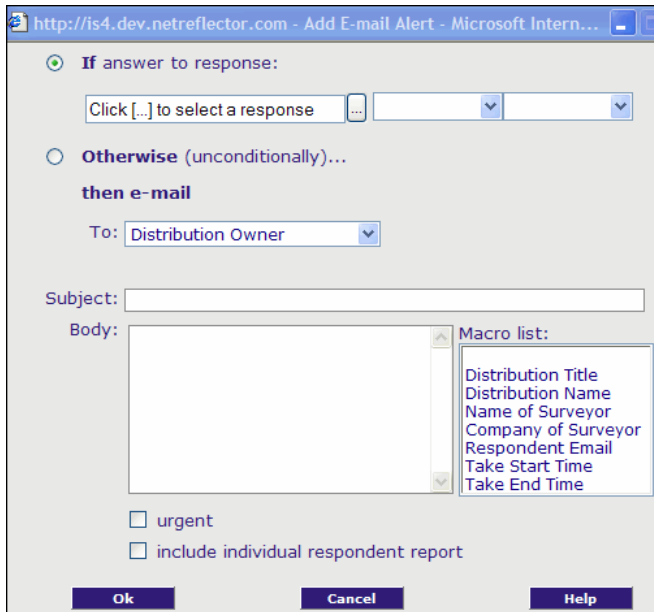
- **Dissatisfied customer alert** – You may wish to immediately follow up on any survey respondents who indicate they were dissatisfied with your product or service.

- **Survey receipt** – You may wish to offer survey respondents a record of their responses via e-mail.

- **Comment routing** – You may want any open text comments to be immediately read by a customer service representative in case they include unrelated requests or issues that need a response.

You can set up multiple e-mail alerts for a survey, customize the subject line and body text, and optionally include a report of the individual's survey responses.
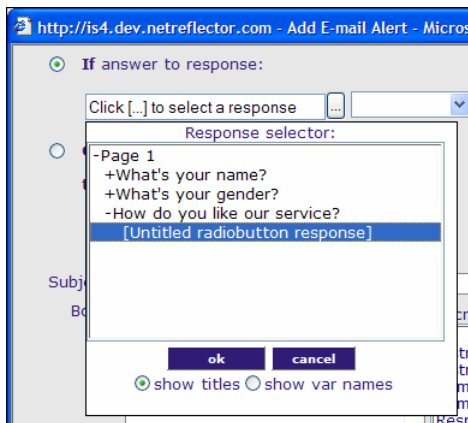
To create an email alert

1. In the *Edit Survey* page, select **the page on whose submission you want the alert processed**. This can be later than the page that contains the response that triggers the alert.

2. Click **Add** on the *Page Actions* drop-down list and select **E-mail Alert**. A dialog box opens.

3. Select one of the following:

   o Select **IF answer to response.** to trigger an alert, select a response element that specifies the condition and range of choices using the drop-down lists.

   o Select **Otherwise (unconditionally)** if you want an alert sent for all responses.

4. Click ⊡ button to select the desired response. The *Response selector* pop-up window opens.

5. Drill down to the appropriate response ([untitled radio button response]) and then click **OK**. Two drop-down lists become available on the right:

    o A drop-down list of values with **=**, **<>**, **>**,**<**, **<=** and **>=**.

    o A drop-down list of responses.

6. Select the desired response. The first condition is now defined by the particular question and the desired response. For example, the drop-down list fields could have **=** and **Very satisfied**.

7. From the **To:** drop-down list, specify the e-mail address that the alert should be sent to. This can be one of four options:

    o **Distribution Owner**: The address of whoever distributes the survey.

    o **Survey Respondent**: The address of the survey taker.

    o **Address in a text response**: An address that will be contained in a text response of the survey. A second drop-down list displays with the *Response selector* window. Select the response where the test with the address is found.

    o **Other**: Opens a text field to the right. Enter one or more addresses you type in now (separated by semi-colons).

    Note: There is a 128 character limit for this field.

8. Enter a subject and text of the e-mail in the **Body** field. Double-click an item in the **Macro list** to enter the text of the macro in the **Body**. Macros include:

    o **Distribution Title**

    o **Distribution Name**

    o **Name of Surveyor**

    o **Company of Surveyor**

    o **Respondent Email**

    o **Take Start Time**

    o **Take End Time**.

9. Click one or more of the following checkboxes:

    o **Urgent**: Marks the message as critical.

    o **individual respondent report**: Requires that the report must include all the respondents' answers prior to the alert.

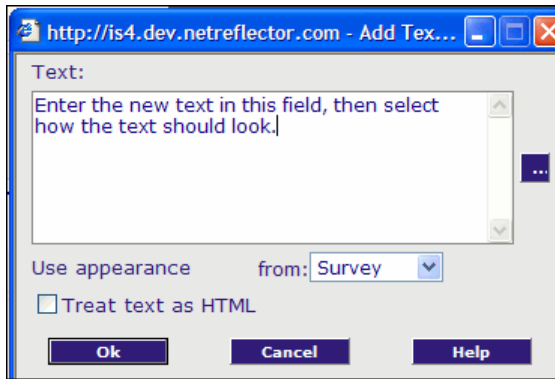10. Click **OK** when done.

Add Text Block

The **Text Block** option allows you to add text to a page.

To add a block of text to a survey page or element

1. On the *Edit Survey* page, click the page (or element within the page, such as question or response). From the *Page Actions* drop-down list, select **Add** and then select **Text Block** from the sub options. A pop-up window displays.

2. In the pop up window, enter the text to add in the text field. From the **Use appearance** drop-down list, select how the text should look, using the options:

    o **Survey**

    o **Category**

    o **Question**

    o **Response.**

3. (Optional) Click the **Advanced editing** () icon for more formatting options. See **Advanced Editing** for more information.

4. (Optional) Check the checkbox next to **Treat text as HTML** to format the text in HTML. The text displays within the page.
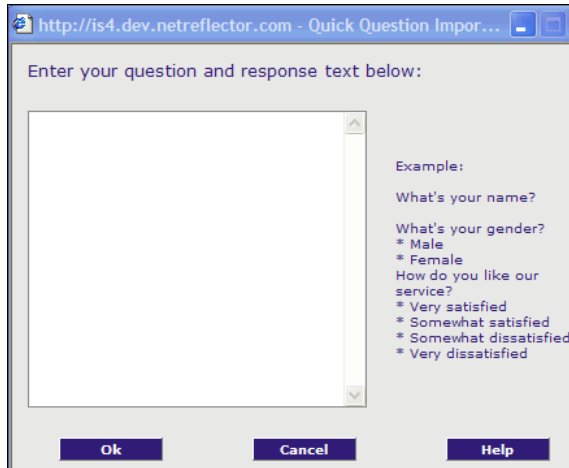

Add Quick Question Import

The **Quick Question Import** option allows you to insert additional questions and responses with the Quick Question Import feature.

To insert questions and responses with the Quick Question Import feature

1. On the *Edit Survey* page, click the page (or element within the page, such as question or response). From the *Page Actions* drop-down list, select **Add** and then select **Quick Question Import** from the sub options. A pop up window displays.

2. Enter the question and response into the text field. For more information about formatting and useful hints for using this feature, see **Quick Question Import**.

Remove Option

The **Remove** option allows you to delete pages or elements from the survey.

To use Remove in the Page options drop-down list

1. On the *Edit Survey* page, click the page (or element within the page, such as question or response). From the *Page Actions* drop-down list, select **Remove**. A pop up window displays confirming that you wish to delete the selected element or page.

2. Click **OK**. The page refreshes, and the survey page or element is deleted.

Move Up Option

The **Move Up** option allows you to move a page or page element one place higher up in the survey or page.

To use Move Up in the Page options drop-down list

• On the *Edit Survey* page, click the page (or element within the page, such as question or response). From the *Page Actions* drop-down list, select **Move Up**. The page or element moves up to the desired location.

Move Down Option

The **Move Down** option allows you to move a page or page element one place lower in the survey or page.
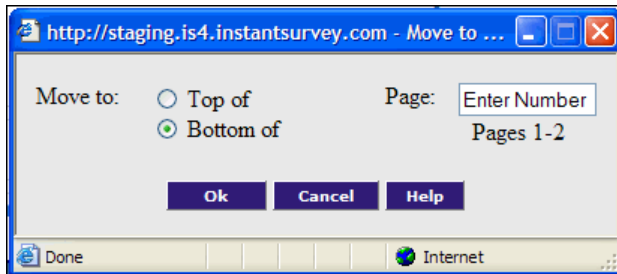
To use Move Down in the Page options drop-down list

- On the *Edit Survey* page, click the page (or element within the page, such as question or response). From the *Page Actions* drop-down list, select **Move Down**. The page or element moves down to the desired location.

Move to Option

This option allows you to designate where you would like move the element to, including the page and the top of bottom of that page.

To use the Move To option in the Page options drop-down list

1. In the *Edit Survey* page, click the element you wish to move. The **options** drop-down list for that element displays on the left.

2. Select **Move To**. A dialog box opens. Use the radio buttons to select the top or bottom of the page. Enter the page number of where the element should move to.

   Note: The number of pages that display below the Page *field is only the total number of pages in the survey. You cannot enter a page number greater than the total number of pages in the survey. If you do, InstantSurvey automatically enters the last page number of the survey.*

3. Click **OK**. The page refreshes and the element now displays in the location you have chosen.

Collapse Option

The **Collapse** option allows you to minimize the page. Collapsing pages can lead to better page load times in the *Edit Survey* page. It contains two sub options:

- **Current Page**: Allows you to collapse the page you are currently working on or have selected.

- **All Pages**: Allows you to collapse all pages in the survey. For more information and useful hints on this feature, see **Collapse All Pages**.

Expand Option

The **Expand** option allows you to expand pages that you have collapsed. It contains two sub options:

- **Current Page**: Allows you to expand the collapsed page you have selected.

- **All Pages**: Allows you to expand all collapsed pages in the survey. For more information, see **Expand All Pages**.

Save as Mini Template Option

This feature allows you to save the page as a mini template, so that you can re-use the questions and responses in new surveys. For more information on creating mini templates, see **Creating a Mini Template**.

Thank You Page

The *Thank You* page displays as the last survey page on the *Edit Survey* page. When a respondent completes your survey, a post-submit page opens. This page can be set to one of three options:

- **Default thank you page** – A generic page that thanks the respondent for participating in the survey.

- **Custom thank you page** – A page that shares the overall appearance of your survey and includes a title and body text that you specify.

- **Redirect to a specified URL** – Sends respondents to any external page that you specify, such as your corporate home page.

The *Thank You Page* appears at the bottom of the survey edit page and displays which option is currently set.
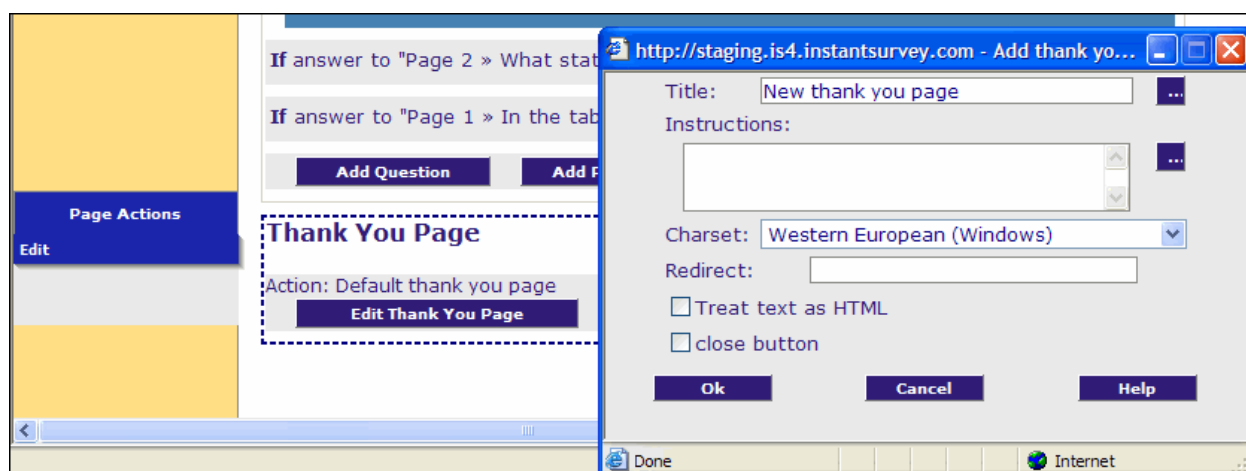
This section includes:

- **Edit and create a custom Thank You page**
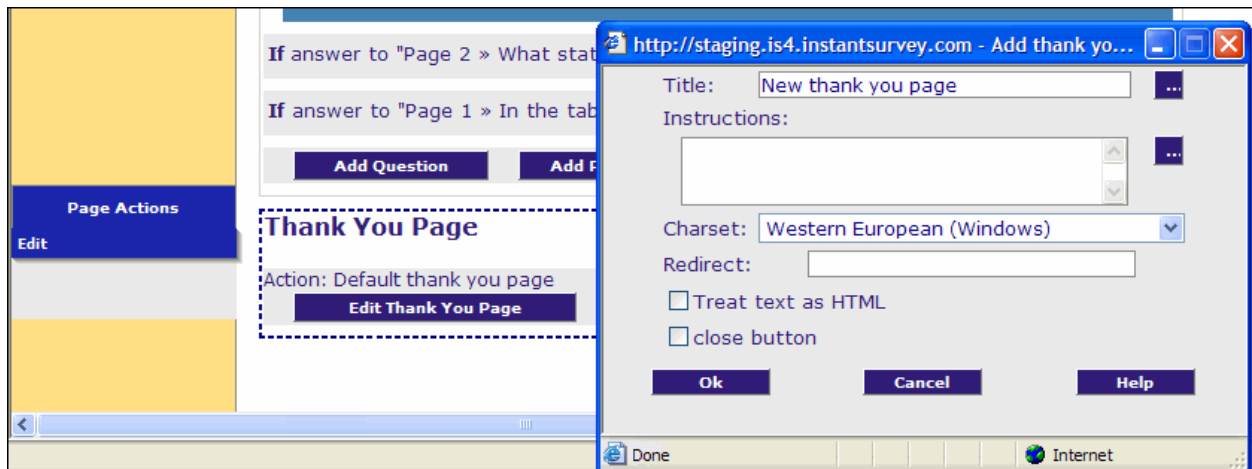
- **Redirect to an external page**.

Edit and Create a Custom Thank You Page

Instead of the using the default thank you page, you may want to use a customized thank you page for your respondents.

To customize the Thank You page

1. Click **Edit Thank You Page**. A dialog box opens.

2. Enter the following settings in the dialog box:

•   **Title**: Enter the new title of the custom thank you page in the **Title** field. This displays with the same formatting applied to your Survey Title.

•   **Instructions**: This displays with the same formatting applied to your Survey Instructions. Enter instructions in the **Instructions** field.

•   **Advanced editor**: Click the ( ) icon to use the advanced editing feature. For more information, see **Advanced Editing**.

•   **Charset**: Select from a drop-down list the multi-lingual encoding to apply to the page, if necessary.

•   **Redirect**: Leave this blank if you are customizing the *Thank You Page*. See the discussion on *Redirect to an External Page*, below.

•   **Treat text as HTML**: Check this if you use HTML coding in the title or instruction text.

•   **Close button**: Select this option if your survey displays in a pop-up window, and you want to display a "close window" button.

3. Click **OK** when done.

Redirect to an External Page

You can redirect respondents to a different page when they complete your survey.

To redirect respondents to another page

1. Click **Edit Thank You Page.** A dialog box opens.

2. Enter a complete URL in the **Redirect** field. Ignore all other fields.

3. Click **OK** when done.

> **Note**: *A complete URL must be entered such as http://www.domain name.com.*

Advanced Editing

In many of the panes in the following functions, you see a small **Advanced editing options** (⬛) icon to the right. This function allows you to edit instruction text, insert images, set up piping and use other advanced editing features. This icon appears when you are in the *Edit Survey* page, and displays in panes such as **Add Question**, **Add Response** and **Edit Thank You Page**.

This section includes:

- **Advanced editing: Text and adding images**
- **Adding other multimedia**
- **Piping**.

Advanced Editing: Text and Adding Images

Advanced editing is a feature you can use for survey titles, text in responses and questions, as well as in other functions in InstantSurvey.

To use the advanced editing

1. Click the **Advanced editing** (⬛) icon which displays in the pane(s). The **Advanced editing** pane opens.
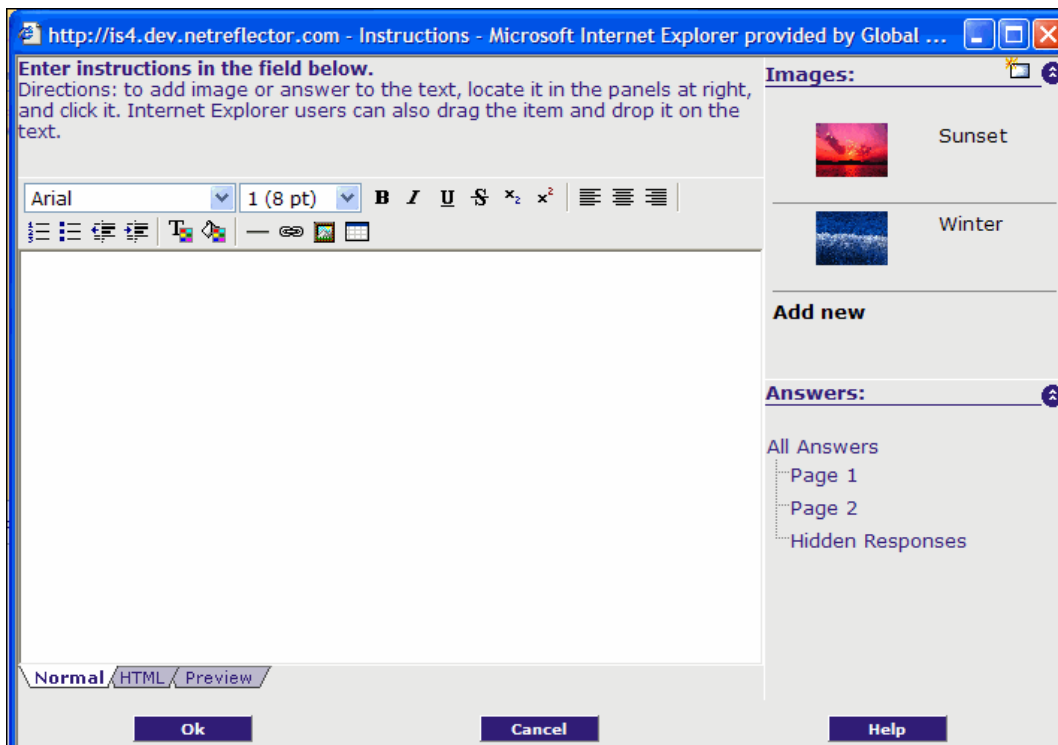
2. Use the various functions within the pane to accomplish different editing tasks:

- **Enter and edit text**: Enter text in the text field below. The tool bar above allows you to select a font, and use other functions similar to those found in the Word toolbar.

- **View text**: The tabs below provide different views of the text you are entering.

    o **Normal**: Allows you to edit and format text in a WYSIWYG manner using a word processor-like formatting toolbar.

    Note: While InstantSurvey does support a number of different browser applications, only the Microsoft Internet Explorer allows you to use this WYSIWYG feature. If you use Firefox, the advanced text editor can still be used for inserting text, HTML, images and piping, but will not display WSYWIG formatting.

    o **HTML**: Displays text as HTML and allows you to edit the code.

    Note: Because the user interface of the InstantSurvey application itself uses HTML, it is possible for incorrect HTML embedded in survey elements to disrupt the proper working of the Edit Survey *functionality. If this occurs, from the* **View Options** *menu, you can switch the editor to* **Safe Mode***. This will disable the display of embedded HTML so that you can use the* Edit Survey *functionality to correct the problem.*

    o **Preview**: Displays text as it appears in the survey.

- **Add images to the text**: To add images, click the name of the image in the section on the right under *Images*. To resize the image, use the scroll bars of the text field to find the edges of the image, and place the cursor on one of the small squares. Drag until the image is the appropriate size.

- **Add new images for inserting**: Under *Images*, click either **Add new** or the **Add image** () icon in the upper right. A new window opens with a list of your archived images.
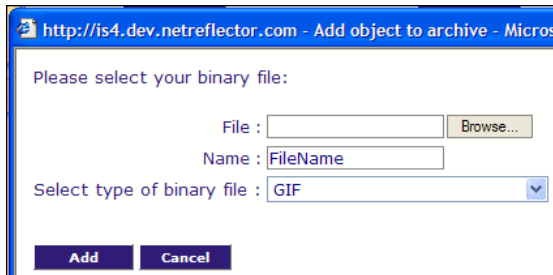

These are the images, which will appear on the right. Click **OK** to put these archived images in the *Advanced editing* pane.

    o To add a new image to the archive:

    a. Click **New**. A window opens with functions for adding the new image file.

b. Locate the file with **Browse**.

c. Give the file a name in **Name**.

d. Indicate the type in the **Select type of binary file** drop-down list.

e. Click **Add**. The new image displays in the *Objects* pane.

o To remove an image from the archive, click the **Delete** (✗) icon in the *Objects* pane. The image will no longer appear as a selection in *Images*.

- **Piping in answers**: Displays the hierarchical outline of the your survey used to select answers to pipe into your survey text.

    For more information on piping, see the section on **Piping**.

Adding Other Multimedia

InstantSurvey allows you to embed any image or multimedia file into surveys, invitations or reports.

Currently supported file types include:

- .gif
- .jpg
- .mpeg animation
- Shockwave Flash
- .wav audio
- .mp3 audio
- Real audio
- .bmp(supported by Internet Explorer only)
- .wmf (supported by Internet Explorer only)
- .emf (supported by Internet Explorer only)
- .AVI (supported by Internet Explorer only).

    Note: You must have the software installed in order to playback the following files: ShockWave, mp3, Real (audio+video), wmv/wma/wmf, AVI, and mov.

To add multimedia files to your survey

You can also upload multimedia files to your image archive and embed them in your survey, but this required advanced HTML coding skills and different coding based on file time and target browser.

1. Follow the same procedure described above for inserting an image into your survey, which will insert a reference to the uploaded file surrounded by an IMG tag.

2. Replace the IMG tag with the appropriate HTML tags for the media type you are embedding.

3. Be sure to test the survey in the browsers that you expect your respondents to be using. The following link contains an FAQ for inserting a video: http://www.instantsurvey.com/faq.asp#video.

Piping

Piping is the ability to display responses to previous questions as part of a later question. For example, you can ask a respondent to enter his or her first name, and then address the respondent by name in later questions. You must use the Advanced Text Editor to insert piping, even in unformatted text.
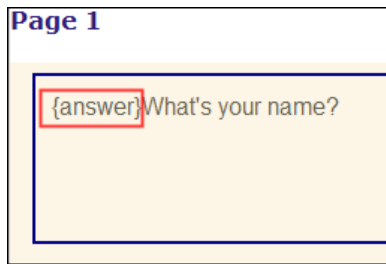
To add piping to a survey

1. Double-click an existing survey element.

   Or

   Click an existing survey element to highlight it and then select **Edit** in the pop-up options menu. A dialog box opens.

2. Click the blue ellipsis (⬛) button to open **Advanced editing**.

3. Navigate the outline of your survey in the *Answers* pane to find the answer you want to insert.

4. Click the answer to insert it into your text, or (for Internet Explorer users) drag and drop the answer where you want to place it.

5. A small placeholder image will appear in your text that represents the special XML code that has been inserted. (You will see the actual XML code if you switch to HTML mode.) You can apply formatting around this placeholder or move it around within your text.

Page 1

{answer}What's your name?

6. Click **OK** when done. The response is added to the piping list for the survey element and a placeholder is inserted on the survey element text. Reposition the placeholder as needed within the survey element text. The placeholder is dynamically replaced with the selected answer when a respondent completes the survey.

Edit Survey Subtabs

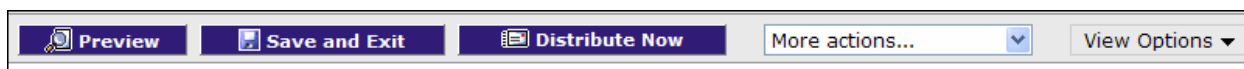These subtabs are located at the top of the *Edit Survey* page, above the survey. These allow quick access to various features for viewing, saving, distributing and editing your survey.

They are:

• **Preview subtab**

• **Save and Exit subtab**

• **Publish Changes subtab**

• **Distribute Now subtab**.

See also:

• **More Actions**

• **View Options**.

Preview Subtab

This tab allows you to see a survey as it appears when users see it. Except for the row of function buttons at the top, this preview is identical to what respondents see when taking a survey.

To use the Preview subtab

- In the *Edit Survey* page, click the **Preview** subtab in the toolbar at the top of the page. A separate browser opens with the survey and toolbar at the top. The toolbar options include the following:

  o **Exit**

  o **Printer-friendly version**

  o **Test distribution**

  o **Preview report**

  o **Set hidden variables**.

Exit

This option closes the survey preview window and returns you to the *Edit Survey* page.

Printer-friendly Version

The printer-friendly version shows all pages of the survey on one page. Two options at the top of the printer-friendly page include:

- **Exit Preview**: Allows you to leave the preview process and return to the *Edit Survey* page.

- **Return to preview**: Allows you to return to the main preview.

Test Distribution

Provides you with a URL you may send to others to test your survey.

Performing a test distribution of your survey allows you to take your survey to test all of its features while it is still in edit mode. Although there is no data associated with this test, it provides a great way for you to include others in the review process so you can make all the necessary revisions to your survey prior to saving it for distribution.

To test your survey

1. In the *Edit Survey* page, click **Preview** and then click **Test Distribution** on the *Preview* page. A new page with the URL of your survey test opens.

2. Click the URL to access the survey, or copy and paste it into an e-mail to share with others who may review your survey prior to distribution.

> *Note: No data is recorded for the survey test. You can conduct additional tests by clicking the **Test Distribution** on the **preview** page. You can use the same URL each time to conduct your test distributions. Changes you make to your survey are saved as soon as they are made. Consequently, revisions will be shown in your survey when the URL is accessed again.*

Preview Report

This feature opens a sample report of your survey. This sample report will confirm that the design of the survey gives you the reporting results that you expect.

PREVIEW REPORT

6153

Distribution Name	Start Date: End Date: Respondents Invited: Total Respondents Completed: Partial Completes:

What's your name?

view text

What's your gender?

• **Select one.**
(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Male	1		100%
Female	0		0%
Total Responses: 1		0% 20% 40% 60% 80%	

How do you like our service?

(Each Respondent could choose only **ONE** of the following options:)

Response	Total	% of Total Respondents	%
Very satisfied	1		100%
Somewhat satisfied	0		0%
Somewhat dissatisfied	0		0%
Very dissatisfied	0		0%
Total Responses: 1		0% 20% 40% 60% 80%	

Set Hidden Variables

If your survey includes piping or branching based on hidden responses, this allows you to manually populate the hidden responses so you can completely test the survey. For more information, see **Conditional Branching**, **Add: Options for Survey Header** and **Piping**.

Test for hidden response	
Respondent Region	Choose one ▾
Respondent City	☐ Boston ☐ Seattle ☐ Houston
	ok cancel

To use Set Hidden Variables subtab

3. In the *Edit Survey* page, click **Preview** and then click **Set Hidden Variables** on the *Preview* page. A page with the hidden responses displays.

4. Make selections and click **OK** to set the hidden variables.

Save and Exit Subtab

This subtab on the *Edit Survey* page allows you to save all the changes you have made in editing your survey. Once you save and exit, the *Creation* page opens with two panes: *Draft Surveys* and *Finished Surveys.* The survey is now a draft survey, because it has not yet been distributed. A survey is *Finished* after you distribute it.

Your survey is constantly saving, as seen in the *Last Saved At* function in the context toolbar. To ensure it is saved, once you have finished creating your survey, you should click **Save and Exit** to save it.

To save your survey

- In the *Survey Edit* page, click the **Save and Exit** subtab. The survey is saved and displays as a draft survey in the *Draft Surveys* pane of the *Creation* page.

ID Numbers
ID numbers are assigned to surveys to distinguish between different versions, or instances, of the same survey and to easily identify and search for surveys. It can often be helpful to be aware of these ID numbers when communicating with GMI support staff. There are two types of ID Numbers used by InstantSurvey:

- **Survey ID**

    Every survey is assigned a Survey ID number when it is created. The survey with the higher number is the more recent version.

- **Instance ID**

    When a survey is distributed, it is assigned an Instance ID. Each distribution of the same survey is called an instance. The higher ID number is the more recent instance.

> **Note**: IDs are shown in the URL when editing a survey or in distribution management.

Publish Changes Subtab

This subtab displays when a survey is finished, and takes the place of the **Save and Exit** subtab. Clicking this publish the changes you've made to all live distributions of your survey. This functionality applies when you are editing a finished survey. For more information see **Editing a Finished Survey**.

Distribute Now Subtab

This feature allows you to send your survey to your respondents. Click the subtab to begin the distribution sequence as described in the "Survey Distribution" document.

More Actions on Edit Survey Page

This feature on the *Edit Survey* page allows you to perform a number of functions on a survey.
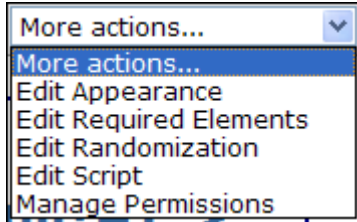

The options include:

- **Edit appearance**

- **Edit required elements**

- **Edit randomization**

- **Edit script**

- **Manage permissions**.

Edit Appearance

This option in the **More Actions** drop-down list allows you to control your survey's overall "look and feel" by setting the format of each survey element type—for example, setting the format of all questions to be Blue Arial Bold against a Gray background.

Select this option from the **More actions** drop-down list in the *Edit Survey* page. The *Edit survey appearance* page opens and consists of five buttons at the top (**save**, **save as theme**, **preview**, **cancel** and **load theme**) and page sections for editing the survey appearance, as well as the elements appearance: header, category, question, response, matrix table and footer.

You can define the overall appearance of your survey by loading a pre-defined theme or by customizing the formatting of each survey element type. You can save your appearance settings as a theme for reuse later.
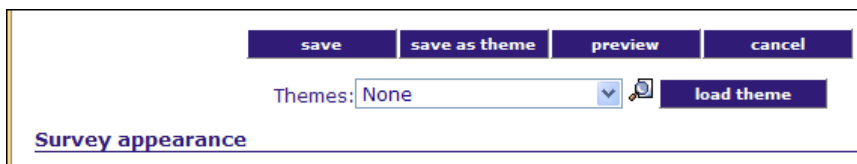
Save: This allows you to save all the changes you make to the survey or elements. Click this when you are finished making changes.

Save as Theme: This allows you to save the changes you make to the survey appearance (text, colors, and so forth) as a theme option for use in future surveys. Clicking this feature opens a pop up window. Enter a name for the theme, place a check next to **with banner** to include the survey banner in the theme, and click **OK**. See **Name and Theme** for more information about theme options.
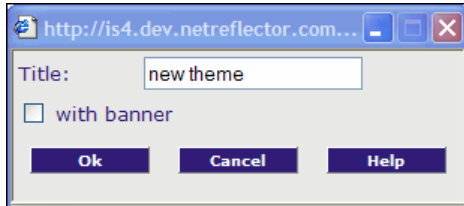
Preview: This feature allows you to see the general appearance of the theme, including response types and background color. Clicking this feature opens a separate page with a preview of the general appearance of the survey.

Cancel: Allows you to leave the *Edit survey appearance* page and return to the *Edit Survey* page.

Load Theme: This feature allows you to select a new, pre-defined theme from the **Themes** drop-down list and apply it to your survey. You can preview it using the preview () icon. To apply a theme to your survey, select a theme and then click **load theme**. Then click **Save**. You return to the edit survey page with the theme applied to your survey.
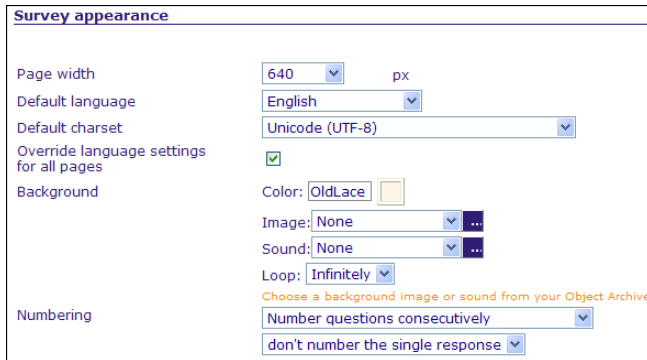
The sub-topics are:

- **Survey appearance**
- **Header appearance**
- **Category appearance**
- **Question appearance**
- **Response appearance**
- **Matrix table appearance**
- **Footer appearance**.

Survey Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Survey Appearance* is the first option for editing.

Options in most panes

This pane contains functions for setting the overall look of the survey. Three options occur in most panes: background color, text properties and numbering.

- **Background Colors**

  Select colors for each area of your survey by clicking on the color square to display a palette of standard colors. Click the color you want from the list, or select the **More Colors** option for a larger color palette. You can also enter specific color names or hexadecimal values directly into the *Survey appearance*.

  > **Note:** *If the background color of a survey element type is not explicitly set, it "inherits" the color of its "parent" element. For example, if you set the background of questions to blue, response backgrounds will be blue as well unless you explicitly set them to a different color.*

To make color selections in Survey appearance

1. Click the color ( ) icon. A pop-up window with the palette opens.
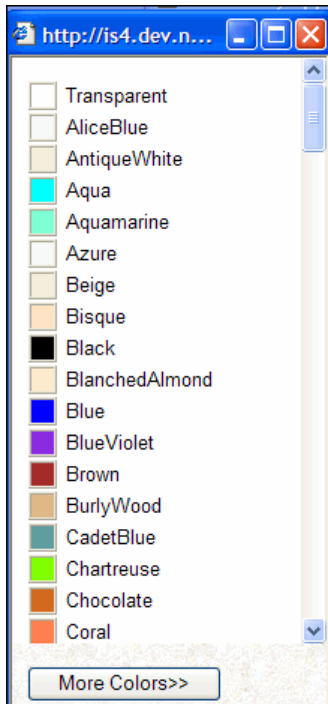
2. Select the color and it will apply to the survey.

- **Text Properties** – For each survey element type, you can control the following properties:

  o **Color** – using the same color selector palette described above.

  o **Style** – bold or italic.

  o **Size** – using the standard HTML font size range of -2 to +4.

  o **Font** – typeface.

  o **Alignment** – left, right, center or justify.

- **Numbering** – Category, question and response numbering may be customized. Different styles of numbers or letters can be used for each survey element and numbering can be set to restart after each category or page break.

The other options within **Survey appearance** include:

- **Page width** – Choose standard pixel widths of 640 or 800, or specify a custom width.

- **Default language** – Set the primary language you will be using for your survey. This includes a number of options for languages other than English. Changing this setting will not affect any language settings you have changed on individual pages unless you select **override language setting for all pages**. For more information on changing the language for an individual page, see **Changing to a Foreign Language on the Page** in the discussion of the **Edit** option in the **Page options** drop-down list.

- **Default charset** – Set the primary character set you will be using for your survey. Changing this setting will not affect any character set settings you have changed on individual pages unless you select "override language setting for all pages."

- **Override language settings for all pages –** Reverse the language settings entered for all pages.

- **Background color** – Set the background color for your entire survey.

- **Background image** – Select a wallpaper image from your Object Archive. The image may be tiled, or repeated, to cover the entire survey. Use the (▦) icon to add new images to the archive. For more information, see **Advanced Editing**.

- **Background sound** – Select an audio file from your Object Archive to play while the respondent takes the survey. Use the (▦) icon to add new sound files to the archive. For more information, see **Advanced Editing**.

    Note: Adding wallpaper and background images in your survey can substantially increase the amount of time it takes for respondents to access your survey because of the time it takes to load this into their browser windows.

- **Background loop** – Select the number of background loops for your audio file (indicates how many times the audio will play during the survey).

- **Numbering** – Choose overall numbering options, such as whether numbering should restart at every category or page and whether a single response should be numbered or not.

Survey Formatting Tips
Consider using the same font throughout the survey. The survey can be enhanced by varying the look of the font in other ways. Experiment by changing the type size, color, style and alignment in different parts of the survey.
Background images sometimes make a survey very difficult to read, and can make the survey look "busy".
Selecting many different colors can be distracting and can make text difficult to read if the font color does not contrast greatly to the background color.
Sound files are often very large and can therefore take a very long time to load.

Header Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Header appearance* is the second option for editing.

Header appearance							
Banner							
Title font	#666655 ■	☐ *italic* ☐ **bold**	+1 ∨	Arial ∨	center ∨		
Instructions font	☐	☐ *italic* ☐ **bold**	Default ∨	Arial ∨	center ∨		
Instructions background	☐						
	☐ Progress bar						
	☑ Horizontal rule below						
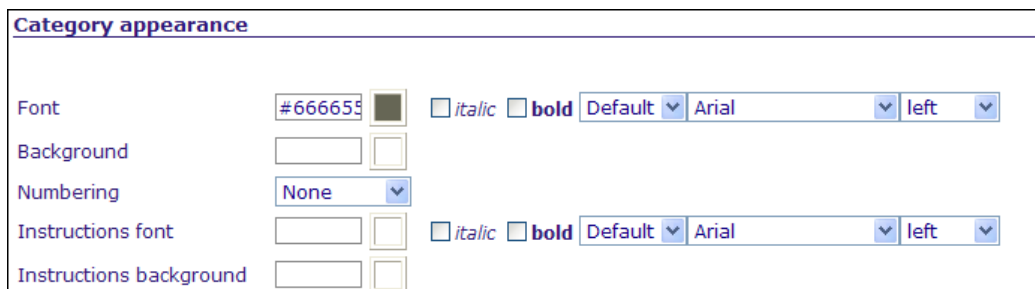
The following formatting can be applied to the header that appears at the top of each survey page:

- **Title font** – Set the text properties for the survey title and other header elements, such as banner and company text. Background color will be the same as the overall survey.

- **Instructions font** – Set the text properties for the instructions that appear below the survey title.

- **Instructions background** – Set the background color of the survey instructions.

- **Progress Bar** – Choose whether to display a *Progress Bar* at the top of each survey page. A progress bar indicates how far along the respondent is in taking and completing the survey responses, measured as a percentage. The font and color settings of the survey instructions will be applied to the *Progress Bar*.

- **Horizontal rule below** – Choose whether a horizontal line displays between the survey header and the main survey content.

    Note: If you have defined a banner image for your survey, it will appear here as well and can be saved as part of a theme.

See *Text Properties in* **Survey Appearance** for details about the options for formatting text.

Category Appearance

Category appearance						
Font	#666655 ■	☐ *italic* ☐ **bold**	Default ∨	Arial ∨	left ∨	
Background	☐					
Numbering	None ∨					
Instructions font	☐	☐ *italic* ☐ **bold**	Default ∨	Arial ∨	left ∨	
Instructions background	☐					

Group questions and responses with a common theme in a category. The following formatting can be applied to all categories in your survey:
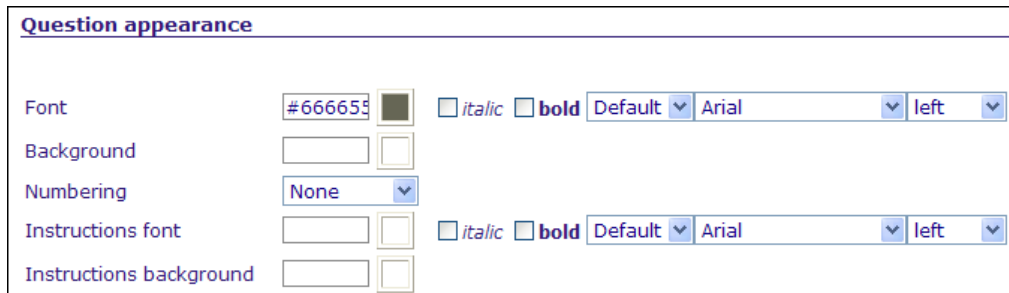
- **Font** – Set the category title text properties.
- **Background** – Set the category title background color.
- **Numbering** – Set the category numbering style (for example, "1, 2, 3, 4," "A, B, C, D," etc.).
- **Instructions font** – Set the text properties for the instructions that appear below category titles.
- **Instructions background** – Set the background color for the instructions that appear below category titles.

See *Text Properties in* **Survey Appearance** for a details about the options for formatting text.

Question Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Question Appearance* is the third option for editing.

The following formatting may be applied to all questions in your survey:

- **Font** – Set the question text properties.
- **Background** – Set the question text background color.
- **Numbering** – Set the question numbering style (for example, "1, 2, 3, 4," "A, B, C, D," etc.).
- **Instructions font** – Set the text properties for the instructions that appear below questions.
- **Instructions background** – Set the background color for the instructions that appear below questions.

See *Text Properties in* **Survey Appearance** for details about the options for formatting text.

Response Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Response Appearance* is the fourth option for editing.

The following formatting can be applied to all responses in your survey:

- **Font** – Set the response text properties.

- **Background** – Set the response text background color.

- **Numbering** – Set the response numbering style (for example, "1, 2, 3, 4," "A, B, C, D," etc.).

- **Banding color** – Set the matrix table banding color.

See *Text Properties in* **Survey Appearance** for details about the options for formatting text.

Matrix Table Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Matrix Table Appearance* is the fifth option for editing.
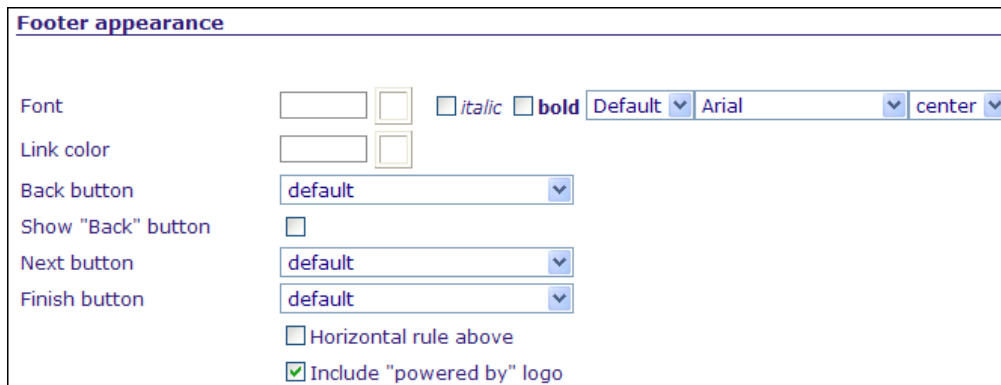
- **Font** – The column header text of matrix tables can be formatted independently of other response text. It is recommended that you center your matrix table text and make the size smaller to improve the look of your matrix tables.

See *Text Properties in* **Survey Appearance** for details about the options for formatting text.

Footer Appearance

Once you have selected **Edit Appearance** from the **More Actions** drop-down list on the *Edit Survey* page, *Footer Appearance* is the sixth option for editing.

The following formatting can be applied to the footer that appears at the bottom of each survey page:

- **Font** – Set the footer text properties.

- **Link color** – Set the color of links that appear in the standard footer (for example, a link to contact technical support).

- **Button style** – Customize the **Back, Next and Finish** buttons that appear at the bottom of survey pages. Options for each button are:

    o **Default** – Plain button using built-in text labels that are automatically translated into the language chosen for your survey.

    o **Custom text** – Plain buttons with text you enter here.

    o **Custom image URL** – The full URL of an image located elsewhere online.

    o **Custom image from archive** – Select an image from your object archive to use for this button.

- **Horizontal rule above** – Choose a horizontal line to display between the main survey content and the survey footer.

- **Include 'powered by' logo** – Choose to remove the 'powered by' logo from the survey footer. This feature is controlled by permission.

    See *Text Properties in* **Survey Appearance** for details about the options for formatting text.

Edit Required Elements

Select this option from the **More actions** drop-down list in the *Edit Survey* page to edit required elements in your survey.

This feature allows you to select which responses in the survey you wish to make required. A required response is one in which a survey-taker must answer before they can continue with the survey.

Select this option from the **More options** drop-down list in the *Edit Survey* page. The *Required survey elements* page opens. Use the checkboxes next to the questions to select those elements which are required, then click **Save**. See **Add Response** for more information about required responses.

Edit Randomization

Select this option from the **More actions** drop-down list in the *Edit Survey* page.

The InstantSurvey randomization feature allows you to present your desired questions or responses in random or scrambled order. This is particularly helpful in eliminating bias from those respondents who might automatically select the first response available from the list of responses.

> **Note:** *Randomization is not the same as rotation, which displays the responses in a rotated order. Therefore, some respondents will see questions, responses and response elements in the same order.*

To randomize your survey

1. In *Edit Survey* page, select **Edit Randomization** from the **More actions** drop-down list. The *Randomize Survey Elements* page opens.

2. Check the check boxes located next to each item to select those that you want to randomize. Clicking in the check box again will deselect it.

3. When you have finished making your selections, click **Save** or click **Cancel** to quit without saving.

> ***Randomization Tip****: We recommend that you do not randomize any questions, responses or response elements labeled* Other, None, Comments*, etc. so respondents always view these as the last option they can select or complete.*

Randomization Rules:

- Questions can be randomized only within a category, not among different categories.

- Within a category, there must be a minimum of two questions to be randomized.

- Within a question, there must be a minimum of two responses to be randomized.

- If you have copied a survey that has randomized questions, responses and response elements, these will appear in your copy. Deselect any or all that you do not want randomized.

Edit Script

Select this option from the **More actions** drop-down list in the *Edit Survey* page.

InstantSurvey allows you to embed custom client-side JavaScript code in your survey pages. The most common use of client-side scripting is data input validation, that is, checking the user's input for errors before advancing to the next page. Because the code executes on the client's computer rather than on the server, there is no delay while the page submits and the server responds.

Examples of client-side scripting

- Allowing only numbers to be entered into a text box.

- Allowing only specific formats, like e-mail address or social security number to be entered into a text box.

- Allowing no more or no less than a specific number of checkboxes to be selected.

- Setting a timer to automatically advance to the next page of a survey after a specified period of time.

> *Note: Creating client-side scripts requires that you know how to program using the JavaScript programming language. However, a collection of ready-to-use scripted responses are available as mini templates. These can be used with minimal programming knowledge.*

Scripts can be added to a survey via the *Script Editor* page, which is accessible from the **More actions** drop-down list in the *Edit Survey* page. Opening the *Script Editor* page displays an outline of your survey, with links to add scripts or assign variable names to each survey element. Scripts can be attached to pages, responses, or response choices and associated with specific event handlers.

To use the Script Editor

1. On the *Edit Survey* page, select **Edit Script** from the **More Actions** drop-down list. The *Script Editor* page opens.

2. Click **[change >>]** to change the variation name of the question. A pop up window opens with a field for entering the new ID. Enter the new ID.
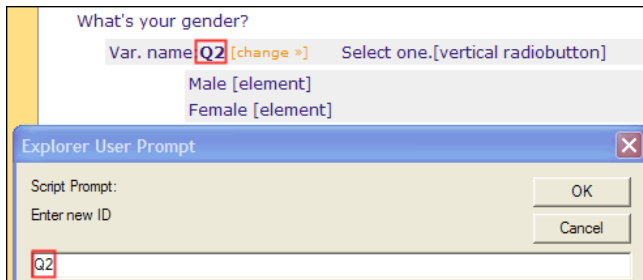
3. Click **[add script]** to the right of the response to add a new script. A drop-down list displays, along with a text field. From the drop-down list, select **onValidate, onInit,** or **custom** (which opens a separate text field to the right for entering a custom script)**.** See *Response Choice Scripts*, above for a description of these options.
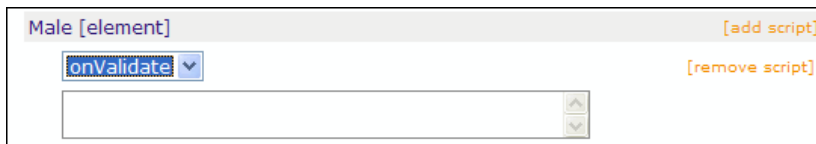
4. (Optional) Click **[remove script]** to delete the script. A pop up window displays asking you to confirm.

To reuse Scripts

Scripts can be attached to individual pages or responses in your survey. When you save survey elements as mini templates, any scripts attached to those elements are saved as well so they can be easily reused in other surveys. The following link contains more information and samples of scripting: http://www.instantsurvey.com/faq.asp?CID=NLC-IS#restrict.

The sub-topics are:

- **Page scripts**

- **Response scripts**

- **Response choice scripts**

- **Special variables**.

Page Scripts

Scripts attached to pages can execute when the page loads. You can also create functions that can be used by other scripts on the page.

Page scripts support the following event handlers:

- **onInit**: Executes when the page loads.

- `function`: Can be called by other scripts on the page.

Response Scripts

Scripts attached to responses can initialize the value of a response when the page loads or validate the input of a response when the page is submitted.

Response scripts support the following event handlers:

- `onInit:` Executes when the page loads.

- `onValidate`: Executes when the page is submitted.

Response Choice Scripts

Scripts attached to individual response choices can respond to clicks on individual radio buttons or checkboxes.

Response choice scripts support the following event handlers:

- `onInit:` Executes when the page loads.

- `onValidate`: Executes when the page is submitted

- `custom`: Can be any standard JavaScript event, such as onClick, onMouseOver

Special Variables

Several special variables can be used to pass data into and out of custom scripts:

- `Result:` The value of this variable is set to 'OK' before each validation script. Set the value to 'stop' to indicate that validation failed, which will prevent the survey from advancing to the next page.

- `Thiselement`: This object is initialized to the response element to which the script is attached, which provides a generic method of accessing its attributes. For example, `thiselement` value allows you to get or set the value of the response.

     Note: `thiselement` is not available in custom response choice scripts, such as onClick or onMouseOver. Use `this` instead.

- **Variable names**: You can use the variable names of survey responses to address any responses on the page. For example, Q2.value allows you to get or set the value of the response named 'Q2.' For a complete explanation, see **Response Variable Names**.

Manage Permissions

Select this option from the **More actions** drop-down list in the *Edit Survey* page.

Survey Design and Creation

Permissions for Bruce Test Temp...		Read	Write	Delete	Apply to dependent objects
Owner:	Bruce Singleton [change>>]	☑	☑	☑	☐
Group:	[Inaccessible group] ▾	☐	☐	☐	☐
Everyone:		☐	☐	☐	

[ok] [cancel] [help]

See **More Actions** in *Draft Surveys* for more information about setting and managing permissions.

View Options

This option displays under the main tabs on the right on the *Edit Survey* page.
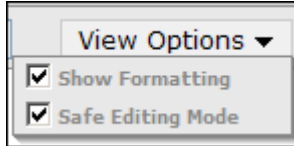
The **View Options** drop-down list on the *Edit Survey* page allows you to choose two options:

- **Show Formatting**

- **Safe Editing Mode**

- A third option, **Show Deleted Items,** displays for finished surveys.

This section includes:

- **Show formatting**

- **Show deleted items**

- **Safe editing mode**.

Show Formatting

Displays the survey with background color, font choices, and other formatting. For more information about formatting, see **Edit Appearance Option**.

Show Deleted Items

Displays only for finished surveys and allows you to see all items that have been removed from the survey.

Safe Editing Mode

Allows you to write and edit code in InstantSurvey. See the procedure in **Advanced Editing** for information about the role of the **Safe Editing** option.

Create Tab

The **Create** tab is another option for creating surveys. The **Create** tab is always available throughout the program, regardless of where you find yourself in InstantSurvey. The **Create** tab has five options in its drop-down, each of which opens a different page and ways of creating a survey.
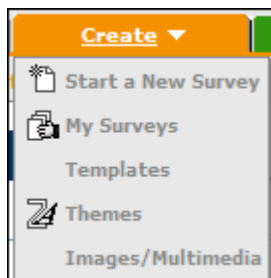
This section includes:

- **Start a new survey**

- **My surveys**

- **Templates**

- **Themes**

- **Images / Multimedia**.

Start a New Survey

This option is essentially the same as the **Create a New Survey From Scratch** button. For a complete explanation, see **Create A New Survey From Scratch**.

My Surveys

This option is the same as **Creation** page options and functionality. It includes two panes:

- **Draft Surveys** – This pane on the *My Surveys* page contains a list of all surveys that you have created, but not yet distributed (sent to respondents), as well as features that allow you to perform different functions with your draft survey: **Distribute survey**, **Edit**, **Delete** and **More actions**.

- **Finished Surveys** – InstantSurvey allows users with appropriate permission to make changes to surveys after they are distributed. This allows users to fix mistakes in the survey text, or other last-minute changes.

    Note: Survey elements cannot be deleted permanently from a finished survey because doing so would change the data structure of any existing answers. Instead, they are removed from your survey, but will still appear in reports.

It also includes the two functions that display on the *Home* page, **Create A New Survey From Scratch** and **Creating a Survey From a Template**.

The sub-topics are:

- **Draft surveys: Distribute survey option**
- **Draft surveys: Edit option**
- **Draft surveys: Delete option**
- **Draft surveys: More actions drop-down option**
- **Using draft surveys to create surveys**
- **Using finished surveys to create surveys**
- **Editing a finished survey**.

Draft Surveys: Distribute Survey Option

This feature allows you to send your survey to your respondents. For a complete description, see the document on "Survey Distribution."

To distribute your survey

1. On the *Creation* page, use the radio button to select the survey you wish to distribute.
2. Click **Distribute survey**. A page with the options for distributing the survey opens. The complete procedure is described in the "Survey Distribution" document.

Draft Surveys: Edit Option

This feature allows you to edit your survey by opening the *Edit Survey* page. This document contains descriptions on the various elements and features for editing your survey. Use the radio button to select the survey you wish to edit and click **edit.** The *Edit Survey* page opens. For more information about editing a survey, see **Edit Survey**.

Draft Surveys: Delete Option

This feature allows you to remove surveys from InstantSurvey. Use the radio button to select the survey you wish to delete and click **Delete**. A pop-up window displays asking for confirmation.

Draft Surveys: More Actions Drop-Down Option

This drop-down list provides further options for your draft survey. These include **Copy, Permissions** and **Rename.**

Copy: This feature allows you to copy the draft survey (undistributed). This creates a second version of a survey you have been working on but have not sent to respondents. The new draft survey is named "Copy Of…[name of survey]."
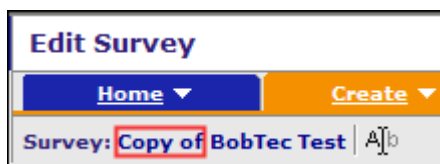
To rename your new copy of the draft survey, click the **rename** ( ) icon and follow the steps in the pop up window. See the *Hint* in **Creating a Survey From a Template**.

Permissions: The *Permissions* feature allows you to set permissions for your distribution so that members of your group can manage it or view reports of the data. Select **Permissions** from the **More Actions** drop-down list on the *My Surveys* page. A pop up window with the permissions and functions listed displays. See the section on *Permissions* in the "Distribution" document, as well as *Group Collaboration* in the "Overview" document for more information about setting permissions.
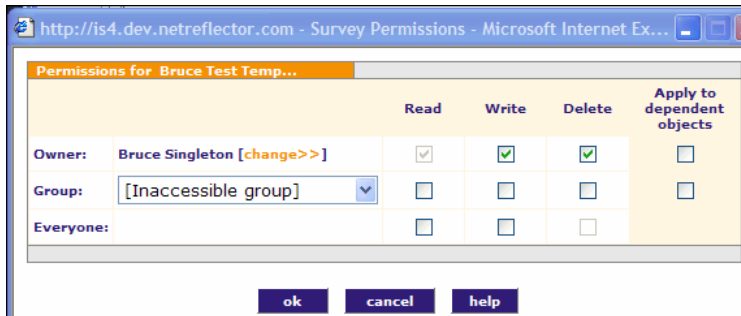
Rename: This feature allows you to give your draft survey a different name. Use the radio button to select the survey you wish to rename and select **rename** from the **More actions** drop-down list. A pop up window opens with **Name** and **Notes** fields. Enter the new name and any notes about the name change. Click **OK.** The page refreshes and the new survey name appears in the *Draft Survey* list.
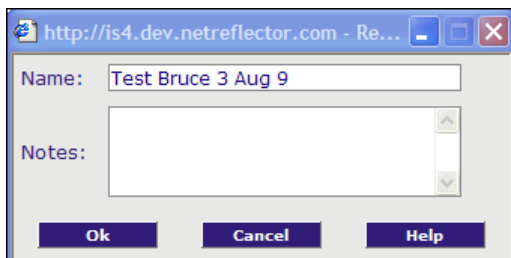
Using Draft Surveys to Create Surveys

You can use existing draft surveys on the *Creation* page to create new surveys.

Survey Design and Creation

Draft surveys are those that you have prepared but not yet sent to respondents. You can use draft surveys to create new surveys two ways:

- **Distribute the draft**: When a draft survey is ready, send it (distribute it) to your respondents. Distribute it "as is," or make changes by editing it.

Select the survey you wish to distribute using the radio button and click **Distribute survey**. For more information about distributing a survey, see the document "Survey Distribution." You can also edit the survey before distributing it by selecting it and clicking **Edit**, which takes you to the *Survey Edit* page. Make changes and distribute by clicking **Distribute Now** on the *Edit Survey* page.

- **Copy and edit**: If you have a draft of a survey that is complete for one group of respondents, and would like to use it to send to a different group respondents, you can copy the draft survey, and then make changes to it to customize it for the new respondents.
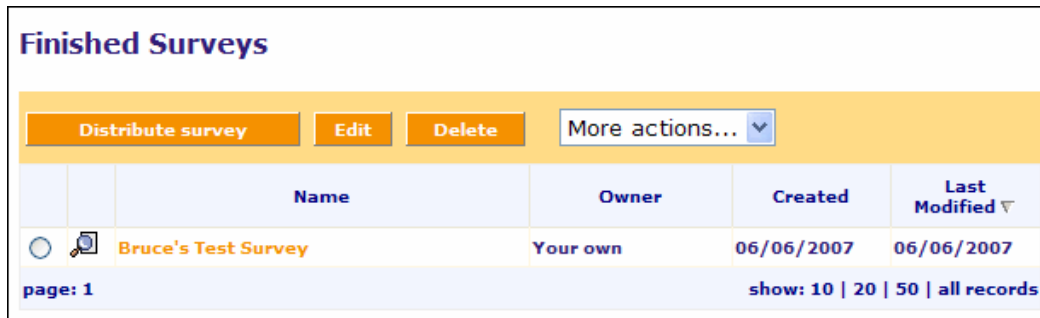
For example, suppose the content of a draft survey is ready to go, but you need to change the name of the company, banner, and color scheme. Select the draft survey with the radio button, and select **Copy.** The survey displays as "Copy of [survey name]". Click **Edit** to go to the *Edit Survey* page. For more information on editing surveys, see **Edit Survey**.

For more information on the other functionality in *Draft Surveys*, see **My Surveys**.

Using Finished Surveys to Create Surveys

Finished surveys are draft surveys that have been distributed (sent to respondents).

You can use a finished survey to create a survey in much the same way you can use a draft survey: simply distribute the survey, or create a copy of the survey. Creating a copy of the survey makes it appear in the *Distributed Survey* pane as a "Copy of…" For more information on using copies of finished surveys, see **Using Draft Surveys to Create Surveys**, above.

Editing a Finished Survey

InstantSurvey allows users with appropriate permission to make changes to surveys after they are distributed. This allows users to fix mistakes in the survey text, or make last-minute changes.

> *Note: Survey elements cannot be deleted permanently from a finished survey because doing so would change the data structure of any existing answers. Instead, they are removed from your survey, but will still appear in reports.*

To edit a finished survey

1. Select **My Surveys** under the **Create** tab.

2. In **Finished Surveys**, select the title of the survey to edit and click **Edit**. A dialog box displays, warning about changing responses can affect the collected data, and advises you to copy the survey and create a new distribution. For information about copying the survey, see *Copy* and *Edit* in **Using Draft Surveys to Create Surveys**.

   > *Note: If your survey has already been distributed, you will be warned that you must click **publish changes** when done for your changes to be reflected in distributed versions.*

3. Enter changes to your survey using the functionality on the *Edit Survey* page. You can edit almost all aspects of your survey, including the text of questions and responses as well as rearrange them.

4. When you are done editing your survey, select **Publish Changes** subtab to update distributed versions of your survey.
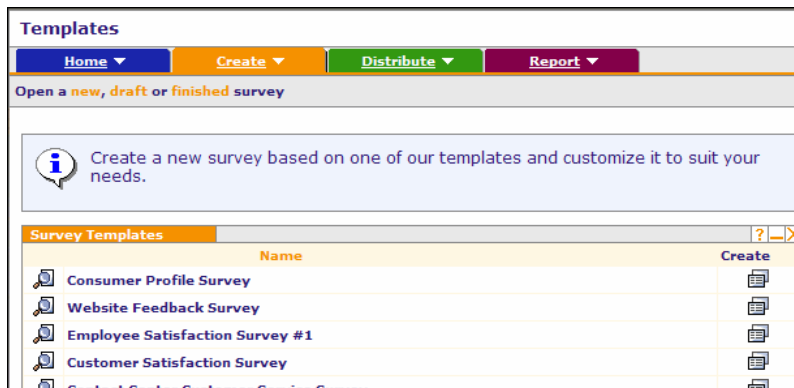
Templates

The **Templates** option in the **Create** tab provides options for using templates, both the pre-loaded templates that come as a part of InstantSurvey, and the mini templates you save. In the *Templates* page, four panes display:

- **Survey Templates**
- **Your Mini Templates**
- **Your Group Mini Templates**
- **Public Mini Templates**.

Survey Templates

These are the different, pre-loaded templates that come as part of InstantSurvey. Select the **Templates** option in the **Create** tab, and the *Templates* page opens with the *Survey Templates* pane.

You can select a survey template and customize it to fit your needs. For more information on using survey templates, see **Creating a Survey From a Template**.
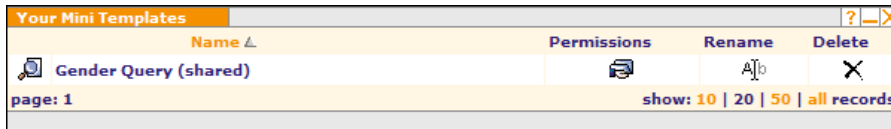
To create a survey from a template from this pane

- Click the **Create** (▣) icon. This opens the *Edit Survey* page.

  For more information about editing options, see **Edit Survey** and the subsequent sections about each feature and element.

Your Mini Templates

Mini-templates are reusable building blocks from surveys.

They can be responses to entire pages of related questions and responses. Fro more information on creating mini templates, see **Creating a Mini Template** and **Save as Mini Template Option**. The *Your Mini Templates* pane shows only mini templates that you create and own. You can share your mini-templates with a group in which you are a member.

To share mini templates

- Click the **Permissions** (⬚) icon. A window opens with a drop-down list of groups.

    Note: *When you share your mini template with a group, the word "(shared)" displays next to the survey name. However, it will not appear in the Your Group Mini Templates pane—only other users in the group with which you share the mini template will see the template in their Your Group Mini Template pane.*

    For more information on groups, see *Groups* in the "Overview" document, as well as **Manage Permissions**.
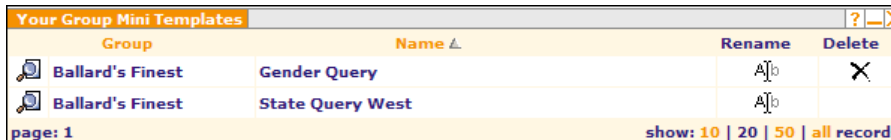
    For more information about using mini templates, see **Add Mini Template Sub Option**.

To preview a mini template

- Click the **Preview** (⬚) icon. A new page opens with the mini template.

Your Group Mini Templates

These are mini templates that someone else has created and owns, but display because you are a member of the group with which the owner has shared the mini template.
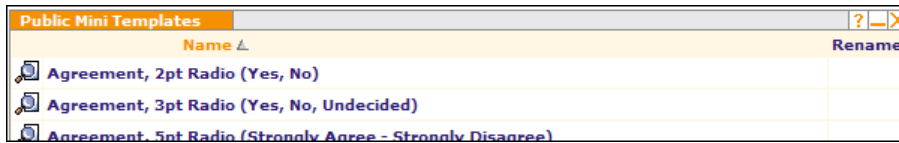
For example, if you belong to the group "Ballard's Finest," and the template creator has shared the mini template with your group, then you see the template in the *Your Group Mini Templates* pane. For more information about using mini templates, see **Add Mini Template Sub Option**.

Public Mini Templates

These are mini templates that all users of InstantSurvey share.

The system administrator for InstantSurvey creates these mini templates and provides them to all users, much like the pre-loaded survey templates. For more information about using mini templates, see **Add Mini Template Sub Option**.

Themes

Expand the **Create** tab and select **Themes**. The *Survey Themes* page opens with panes containing different theme options.
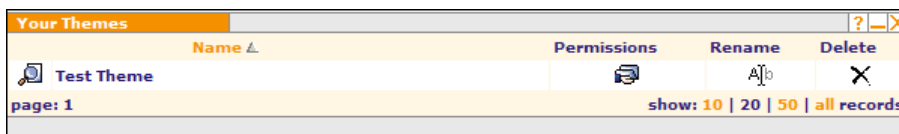
Themes are unified sets of design elements and color schemes that you can apply to your surveys. For more information about themes, see **Name and Theme** and **Edit Appearance Option**.

The Themes option from the Create tab has three panes:

- **Your themes**

- **Your group themes**

- **Public themes**.

Your Themes

This pane displays on the *Survey Themes* page. To view it, expand the **Create** tab and select **Themes**.

These are themes that you have created and saved.

To save a theme from a survey for future use so that it appears in the Your Themes pane,

1. Go to the *Edit Survey* page while working with the survey whose theme you wish to save. For information on accessing a survey once you have left it, see **My Surveys**.

2. In the *Edit Survey* page, use the **More actions** drop-down list in the upper right to select **Edit Appearance.** For more information on how to save a theme to use again, see **Edit Appearance Option**, as well as subsequent sections about the various options for creating and customizing a theme.

To share themes

- Click the **Permissions** ( ) icon. A window opens with a drop-down list of groups.

> **Note:** *When you share your theme with a group, the word "(shared)" displays next to the survey name. However, it will not appear in the Your Group Themes pane— only other users in the group with which you share the theme will see the theme in their Your Group Themes pane.*
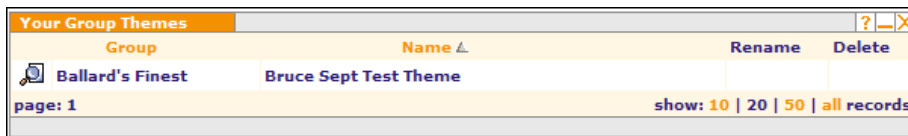
For more information on groups, see *Groups* in the "Overview" document, as well as **Manage Permissions**.

To preview a theme

- Click the **Preview** (🔍) icon. A new page opens with the theme.

Your Group Themes

This pane displays on the *Survey Themes* page. To view it, expand the **Create** tab and select **Themes**.
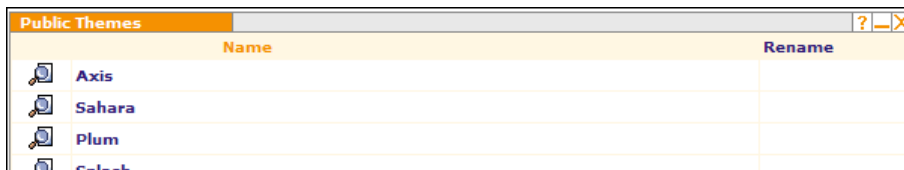

These are themes that someone else has created and owns, but display because you are a member of the group with which the owner has shared the theme. For example, if you belong to the group "Ballard's Finest," and the theme creator has shared the theme with your group, then you see the theme in the *Your Group Mini Templates* pane*.

Public Themes

This pane displays on the *Survey Themes* page. To view it, expand the **Create** tab and select **Themes**.


These are themes that all users of InstantSurvey share. The system administrator for InstantSurvey creates these themes and provides them to all users, much like the pre-loaded survey templates. These themes appear as options in the drop-down list when you are first creating a survey. For more information about making selections from this drop-down list, see **Name and Theme**.

Images / Multimedia

This option allows you to manage images and media in your survey. Expand the **Create** tab and select **Images / Multimedia**.
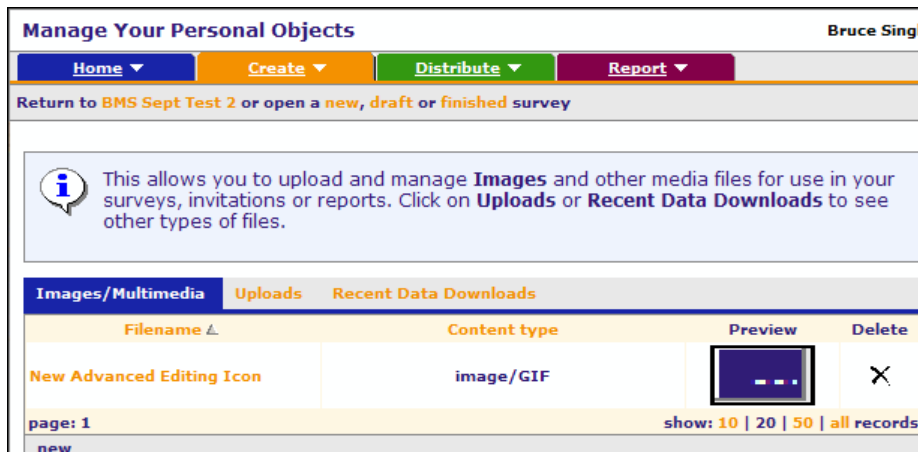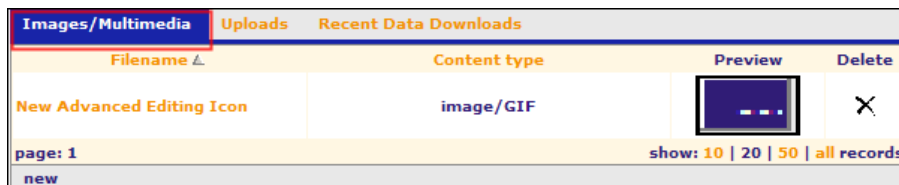
This option opens the *Manage Your Personal Objects* page, with the following subtabs:

- **Images / Multimedia**
- **Uploads**
- **Recent Data Downloads**.

Images / Multimedia

This allows you to view, upload and manage images, sound files and other media files for use in your surveys, invitations or reports.

This subtab lists all the multimedia files you have in your archive so far. In order to import a media file into a survey, invitation or report, it first must be in your media archive.

To add a new media file using Images / Multimedia

3. Expand the **Create** tab and select **Images / Multimedia**. The *Manage Your Personal Objects* page opens*.* The *Images / Multimedia* pane displays.

4. In the *Images / Multimedia* pane, click the **new** link in the lower left. A dialog box opens with options for browsing, naming and selecting the file type.

   For more information about uploading files to add to your multimedia archive, see **Advanced Editing** and the subsequent sections on adding images and media.

Other functionality in this subtab includes:

   o **Filename**: Click to sort the list of files in ascending or descending order.

- o **Content Type**: Click to sort files by content type in ascending or descending order.

- o **Preview**: Click the image to see it in a separate page.

- o **Delete**: Click to remove the media file from your archive.

Uploads

This option allows you to upload and manage respondent preload files.

Images/Multimedia	Uploads	Recent Data Downloads			
Filename ⊿		Size	Content type	Created time	Delete
		no items to show in this view (click here to add)			
page:				show: 10 | 20 | 50 | all records	
new					

Respondent preload files are those that you can create before distributing your survey and use in hidden responses. For more information on preloading data, see *Preloading and Mail Merge* in the "Distribution" document. For information on hidden responses in this document, see **Hidden Response**.

To add a new data upload using Uploads

5. Expand the **Create** tab and select **Images / Multimedia**. The *Manage Your Personal Objects* page opens.

6. Click the **Uploads** subtab in the pane that displays.

7. Click either **(click here to add)** or the **new** link. A dialog box opens in which you can browse to select your file. Use the **Encoding** drop-down list to select the encoding type that applies to your file. The default is **Auto-Select (Windows-1252)**, and the option that fits all file types is **Unicode (UTF-8).**

   The sorting options are similar to those in *Images / Multimedia*, above.

Recent Data Downloads

This feature provides access to recently downloaded survey data files.

Images/Multimedia	Uploads	Recent Data Downloads				
Filename ⊿	Size	Content Type	Last Modified		Delete	SSL
		no items to show in this view				
page: 1					show: all records	

For more information on downloading data files, see the "Reporting" document.

To see recent data uploads

1. Expand the **Create** tab and select **Images / Multimedia**. The *Manage Your Personal Objects* page opens.

2. Click the **Recent Data Downloads** subtab in the pane that displays.

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