Suite Manual

Survey Module

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Survey Module

This manual contains information on how to set up, publish and view the results for an online survey.

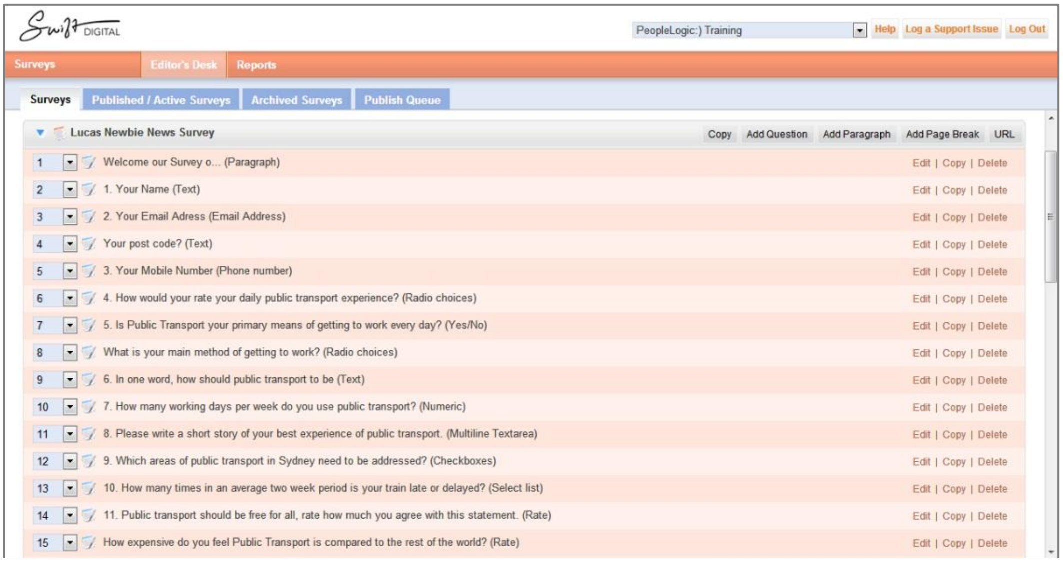
Introducing the Survey Module...

Swift Digital Survey is the most effective way to poll your target audience and collate data quickly and easily.

Electronic surveys are a smart, powerful and efficient way to gather insight into your customers, staff or members. They are simpler to organise, easier to complete, and data is collected instantly so results and reports are available in real-time.

Create a New Survey

Unlike other modules in the Suite, the *Survey Module* launches in its own window.
After accessing the *Survey Module* you will be brought to the Survey *Editor's Desk*. To create a new survey simply type a title for the survey (this can be changed later if you are unsure of what to call it) in the text area at the top of the page that by default says, “Create Survey *(type in the new survey name here)*” Click “Go” to the right when you have typed the name of the survey. This will create the survey and it will now be on your *Editor's Desk*.

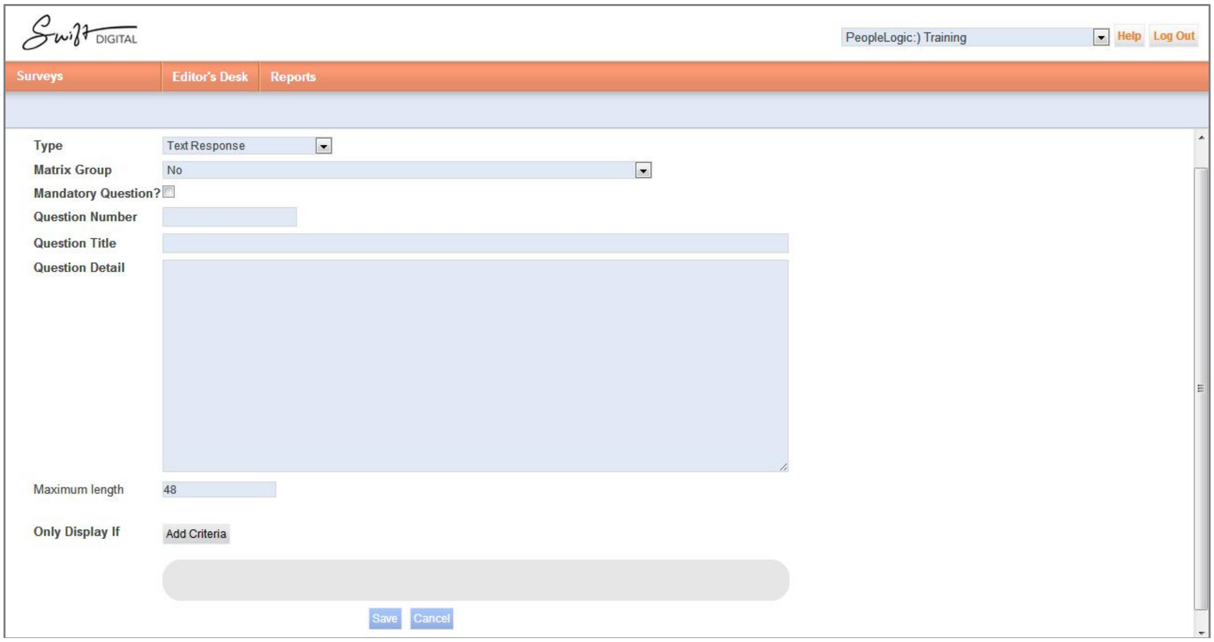


Add Content to your Survey

There are three types of content you can add to your survey. These are Questions, Paragraphs and Page Breaks.
A question is a standard survey question, this can be long answer, short answer, multiple choice, numerical and so on and so forth. A paragraph is text in between questions. This text could be an introduction paragraph to your survey or perhaps a paragraph that helps explain how to answer the following question. A Page Break, as it implies, is a simple Page Break within your survey, meaning that wherever the Page Break is inserted the questions/text following it will go onto a new page. When a user fills out a survey and comes to a page break they will have to click on to continue to the next page.

Add a Question

To add a question click the “Add Question” button to the right of the corresponding survey title on the *Editor's Desk*.



You will be brought to a page with several fields to fill/specify. The first field is a drop down menu labeled, 'Type'. In this drop down menu you will choose the type of question you wish to add to your survey. The types you can choose from are:

Yes/No: This type of question will only allow for the user to select Yes or No as the response.

Text Response: This type of question will allow for a short text response and displays a single line text field for recipient input.

Numeric Response: This type of question allows only a numerical response. The user will be told they cannot submit the answer if they have added characters other than numbers.

Essay Response: Similar to Test Response, this type of question will allow for a more extensive text response and displays a larger, multiple line text field for input.

Radio Buttons: This type of question will restrict the user to a number of responses that you specify. They will have to choose only one of the responses.

Checkboxes: This type of question will once again restrict the user to choosing from responses which you specify. However, unlike radio buttons, they can select more than one response.

Dropdown List: This type of question will show a list of responses (specified by you) in a drop down menu.
They will have to select one response from the list.

Rated Response (1-5): This type of question is used for rating questions. You will have 5 responses to specify.
Only one of the responses can be chosen by the user.

Phone Number: This type of is functionally very similar to Numeric Response but should be used for phone numbers only for purposes of clarity in understanding the data gained.

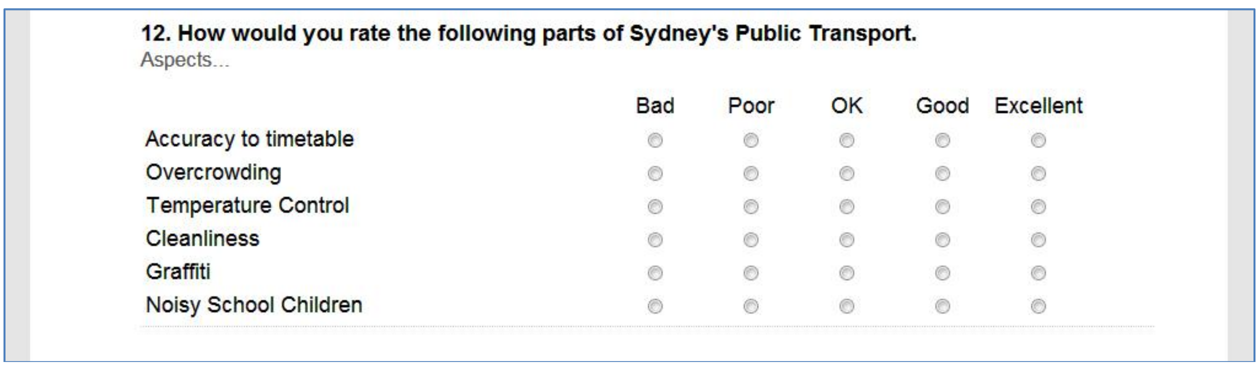
Ranking: Creates a questions where the respondent may rank the listed options (as many as you input) on a scale of first to last (for example, best to worst, more effective to least effective etc.)

Email Address: Create a text field for respondents to type in their email addresses, must contain both an '@' and a full stop '.' to be considered a valid answer.

Personalised (non-editable): This type of questions can contain pre-filled information about contacts in your *Mail House*. A link containing these personalisations needs to be published from the Suite to each recipient. Set up your *Custom Fields* and personalized questions and contact the Swift Digital support team to create this personalized link for your survey.

Upload Documents: this question asks for survey recipients to upload a document, such as an image or PDF. The maximum size for each document is 10 MB. This could be used for people to upload photos from an event, or returning a signed document for example.

Matrix Group: This allows you to assign this question to a Matrix Group. The drop down menu allows you to choose any of the other questions in the survey to form the matrix group. This means that the main question will have questions within it. For example, if I create a matrix group from the question: How easy is each Suite module to use from 1-5? Then created a question titled Newsletter and defined that it wouldd fall under the aforementioned 'rate each module' question and repeated this process to make numerous questions (one to rate each module) to fall into the group, then the eventual matrix group would appear like this online:


12. How would you rate the following parts of Sydney's Public Transport.
Aspects...

	Bad	Poor	OK	Good	Excellent
Accuracy to timetable	○	○	○	○	○
Overcrowding	○	○	○	○	○
Temperature Control	○	○	○	○	○
Cleanliness	○	○	○	○	○
Graffiti	○	○	○	○	○
Noisy School Children	○	○	○	○	○

Mandatory Question: Check this box if you wish to make the question mandatory. If the question is mandatory this means that the user has to answer the question before they can successfully submit the survey.

Question Title: This is the title of the question. This can be the question or a referral title.

Question Detail: You can leave this text area blank if you have no need for it. It can be used to type the question if your title did not specify, or it can be used as an explanation on how to answer the question, etc.

Maximum length: You can specify the limit of characters/words entered as an answer here. (This option will not appear for certain types of questions, e.g. Checkboxes, yes/no)

Choices: This option appears if you have chosen multiple choice style questions such as checkboxes, radio buttons, drop down lists etc.

> Click the green plus sign to add a choice.
> A text area will appear, type the choice in the text area.

> To add another choice proceed to click the green plus sign again.
> You can further edit the choices by using the icons to the right. The red X deletes the choice whilst the green arrows change the position in which the choice is in the list of choices.

Only Display If: This allows you to create criteria for this question. It means that whatever criteria you specify at this point has to be met in order for the question to appear in the survey. Clicking Add Criteria brings up a string of drop down menus in which you create a simple query in regards to previous questions in the Survey. For example, a previous question may ask whether the reader is below 20 or above 20 years of age. I can create criteria for another question which specifies that 'Age is below 20', which means this question will only show if the reader previously answered that their age was below 20. You can click Add Criteria multiple times to further define the criteria.

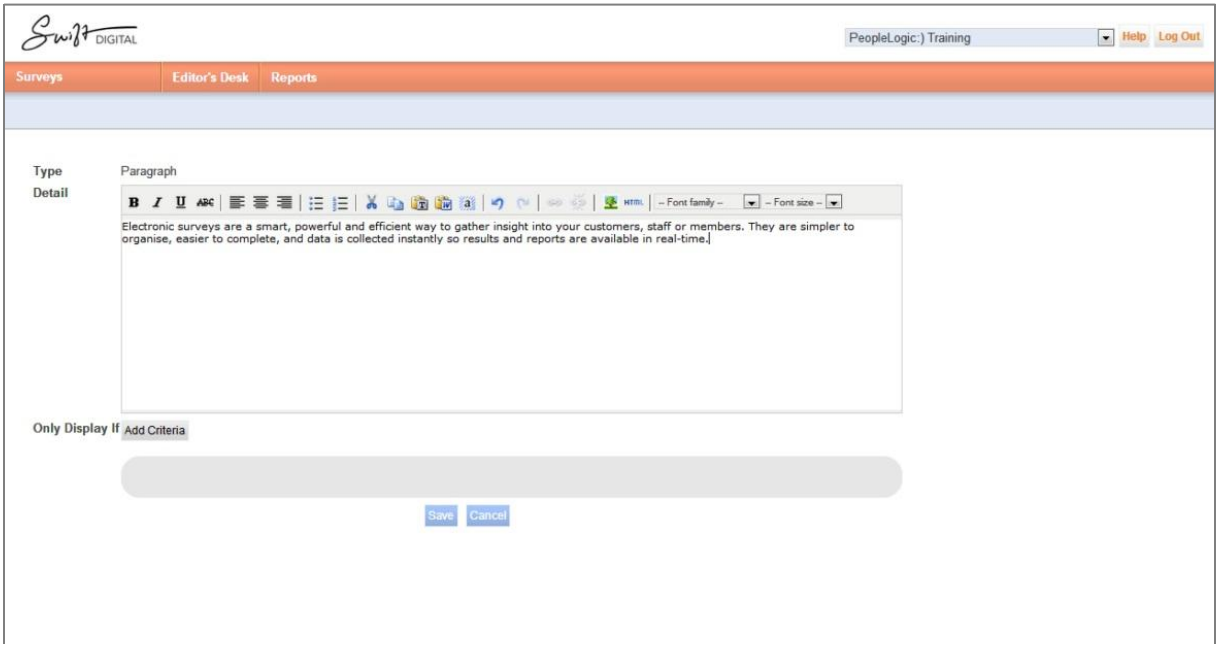
Click "Save" when you have completed creating your question.

Repeat the process to add more questions.

Add a Paragraph

To add a paragraph to your survey, click the "Add Paragraph" button. This will open a text area with editing tools. Create your paragraph content in the text area. You can use text formatting tools to personalise the paragraph. If you wish to paste from Word or any other external software, use the "Paste as Plain Text" button.

After you have completed creating your paragraph click "Save".



Can you add pictures and links to your Survey Paragraphs?

Yes, you can add both pictures and links to your surveys. To insert an image use the insert image icon to the right of the text formatting tools when creating/editing a paragraph's content. A pop-up will appear which will allow you specify/edit the image properties, also, unlike other sections of the suite the image has to be inserted via URL. You can still upload the image into your Suite *Art Library* and copy and paste the URL to locate it for insertion in your survey.

Inserting a link is simple, you can either type the URL or email address directly into the paragraph content area or you can select text and click the link icon to specify its target address. If you wish to unlink any text simply select it and click the unlink icon (next to the link icon).

Add a Page Break

On the *Editor's Desk* click the “Add Page Break” button next to the corresponding survey title. This will instantaneously add a page break at the bottom of the content that already exists in your Survey. Where the page break appears in the list of survey content is where it will appear in your live/preview survey.

How to change the order of content in your Survey

To move questions, paragraphs and page breaks use the drop down boxes to the left of the document titles to change the priority of the document within the list.

Edit, Copy or Delete content from your Survey

Next to each document within the Survey content are three buttons. These buttons are Copy, Edit and Delete.

Copy: This button, if pressed allows you to copy the particular question/paragraph/page break to another survey, or, within the same survey. The original will still exist when a copy is made.

Edit: This button allows you to further edit the content of the corresponding question or paragraph.

Delete: This button allows you to completely delete the document. Once something has been deleted it cannot be retrieved.

Preview (or Delete) your Survey

To view a preview of how your Survey will appear when live, click the “Preview” button at the bottom of your survey content list. This will open a new window in which you can preview and test your survey. The responses made on a preview will not be recorded.

To delete your entire survey click the “Delete” button. This will completely erase the survey from the *Editor's desk*.

Publish your Survey

When you have successfully created your survey and are ready to make it live click the “Publish” button at the bottom of your survey content list. This will take you to the Publish Survey page.

Step 1. Survey publication Schedule

This is where you specify the exact date and time that your survey will be broadcasted and the duration of its broadcast.

Survey start date & time: Either type or select from the calendar a date for your survey to become live.
Then choose from the two drop down menus a time (24 hour).

Survey end date & time: Select the date and time, as you have done prior, for when the survey stops being live.

Step 2. Notification Options

Email responses to this address: Type in the text area the email address where you wish to receive survey responses as they come in.

Step 3. Survey Completion Message

Please enter you message here: This step allows you to create a message that will load after the survey has been completed. The content editor will display, allowing you to customize, personalise and add features like links and anchors to your message. Before publishing your survey you can preview this page by selecting the “Preview Completion Page” button at the bottom of the page.

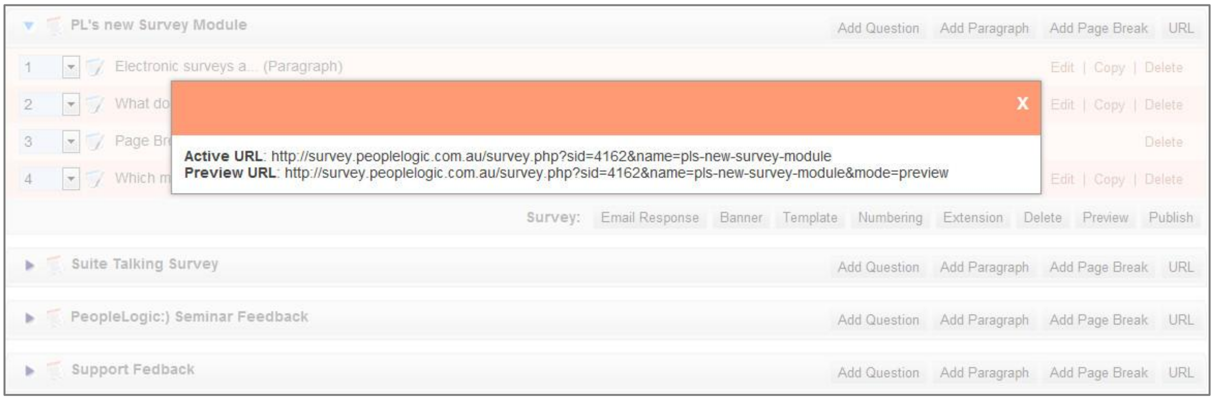
Step 4. Private Survey

This requires the link to the survey to be sent from the Suite. Each user can only complete the survey once. By ticking this checkbox, you will need to publish the Active URL of the survey in an email sent from another module of the Swift Digital Suite.

Click “Publish” once you have filled in the correct publication details. You will then see your survey in the Published/Active Surveys section.

Share your Survey / Get the URL

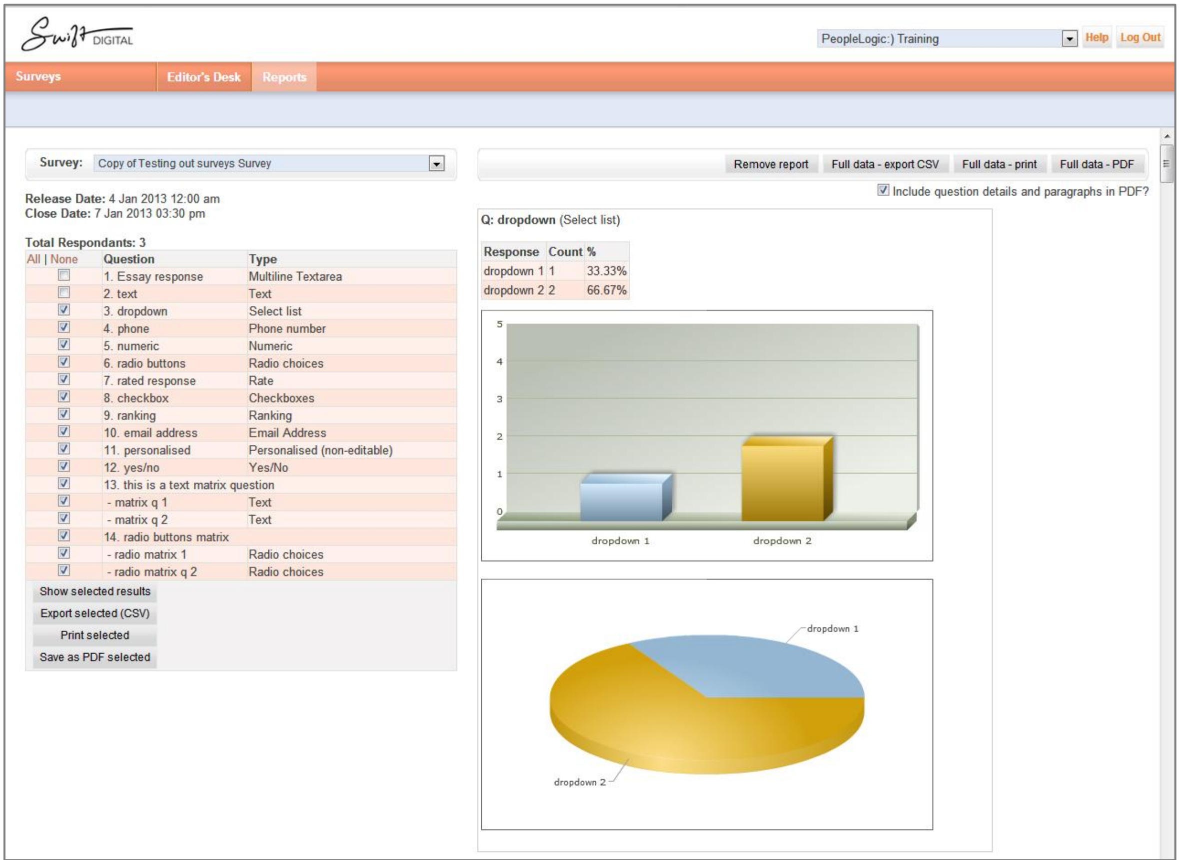
To share your survey with others (either before or after publishing) simply click the URL button to the far right of the survey title on the *Editor's Desk* (or the Published/Active Surveys page). This will open a small pop-up with both the Active URL and the Preview URL. The Active URL is the survey's location when the survey is published and made live. The Preview URL is where the survey can be viewed pre-publication, note that the preview mode does not record responses and results. You can copy and use either URL as a link to share with recipients/testers.



Viewing Survey Results

To view the responses made to your live surveys click the “Reports” tab at the top of the page. In the drop down menu labeled “Survey”, select the live survey that you would like to view results for.

You can check the box next to the questions which you wish to see its results for, or leave them all selected as they are by default. Then click “Show selected results” or “Export Selected” or “Print Selected”. When you select “show selected results” you will be presented with charts that give a clear representation of the responses of your survey questions. The data is organised into a table, bar chart and pie chart.



FAQ

Can you create more than one live survey at a time?

Yes you can publish more than one survey at a time. Other live surveys are not affected if you publish more than the one.

You can also publish a survey to exist permanently or indefinitely, simply set the 'end' date to 100 years in the future, this end date can later be edited so don't worry about specifying an unrealistic end date temporarily.

How to make your Survey consistent with your brand

When you set up a *Survey* account with Swift Digital, our design team will work with you to create a template consistent with your brand. You can have as many templates as you need, but all will need to be discussed with and created by our templaters. These templates will be applicable to your surveys after you have created them by clicking the “Template” button which appears next to the “Edit”, “Preview” and “Delete Buttons” below your survey when on the *Editor’s Desk*.

Our templates also allow for you to upload your own header and footer for individual surveys. Simply click the “Banner” button next to the “Template” button of your survey when on the *Editor’s Desk* to browse and upload an image for your template banner and footer. The template will need to be blank or allow for an uploaded banner/footer in order to work correctly.