

Web Survey Creator

Reference Guide



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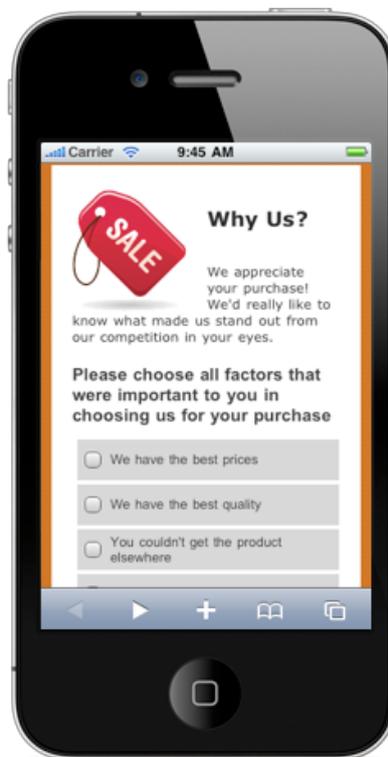
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Surveys on the Web

Web Surveys are an efficient means of collecting information from a large number of respondents very quickly.

The proliferation of advanced internet-capable devices makes it easier than ever before to design engaging surveys that can provide you with quality data.



What is a Web Survey?

A Web Survey can be described simply as a set of questions - sometimes only a single question, though this is normally described as a “poll” - that are displayed in a logical manner to be answered by respondents through a Web Browser.

The goal of a Web Survey is to collect data efficiently. By using the Web, a large number of people can be reached quickly and cheaply.

Challenges faced when creating a Web Survey

There is a certain level of underlying complexity associated with Web Surveys. Key challenges that must be dealt with when creating a Web Survey are:

- The survey content needs to be appealing and easy to read
- Input fields need to be easy to complete
- All data entered needs to be stored
- Reports need to be generated
- Other issues, such as sending of invitation Emails, need to be dealt with

Perhaps one of the biggest challenges that has arisen quite recently is the fact that the methods used for participating in Web Surveys has changed as in the last few years the “Web” has moved from PCs to mobile devices like tablets and smartphones. This adds another level of complexity to managing “Content”.

The rise of Hosted Survey Tools

Clearly the issues that must be resolved to get a Web Survey up and running can only be dealt with by using an application that helps you create a Web Survey. While both Desktop and Web-based applications have been around for a while, the industry is fast moving almost exclusively to Web-based (or “hosted”) survey tools.

- Hosted tools have a number of advantages over desktop-based competitors:
- They can be accessed from any Web-browser
- There is no software to be installed
- Data-storage, and all related activities such as backups, are handled for you
- Access is usually provided for a monthly fee (rather than having to make a large up-front payment)

One of the biggest factors that has led to the growth of hosted tools is the level of advancement we have seen in Web browser capabilities over the last few years. Leading hosted survey tools have leveraged these advances to produce tools that have easy-to-use visual designers, and other features that were formerly only found on desktop products.

Anonymous vs. Non-Anonymous Web Surveys

There are two general types of respondents for Web surveys:

| Anonymous Respondents | Non-Anonymous Respondents |
|--|--|
| Respondents click on a general link to complete a survey, and they are not identified in any way | Respondents are sent an Email with their own personal link. Their response can be directly linked back to them |

For a majority of surveys, anonymity is actually desired. An anonymous respondent is often more likely to provide an honest answer. For example, if you are running an **Employee Engagement Survey**, employees are likely to be more honest if they feel their opinions can not be tracked back to them.

On the other hand, there are times when knowing who the respondent is will be beneficial. For example, if you are running a Customer Survey, it would be useful to know which of your customers are unhappy. Unlike employees, they would be happy to be identified so that their issues are addressed.

Considerations when building Web Surveys

Surveys can vary widely in purpose and content, but there are some common principles that apply to all Web Surveys. The key things you need to consider when creating a Web Survey are as follows:

Planning is Key

Any survey, no matter how simple, will benefit from planning. A badly designed survey will not receive a decent level of response, nor will it provide the results you are after (since you probably don't even know what results you really want).

Ensure you have a purpose!

While this seems obvious, many surveys have been created that are simply "fishing expeditions". They are longer than they need to be, and will receive a worse response rate because people prefer shorter surveys.

Don't Be Ambiguous

If you ask a question, you want to make sure that the answer you get is not affected by how the question is phrased. It is particularly bad when the answers offered confuse a respondent. For example:

How often do you catch a train?

- Never
- Rarely
- Infrequently
- Often

What is the difference between *rarely* and *infrequently*? These are ambiguous values, and should be avoided.

Keep it Short!

No one likes to complete a long survey - the shorter your survey is, the more completed responses you will receive. The longer people spend completing a survey, the less care they will take with their answers (they will lose interest) so more is definitely not better.

Think about the End Result - Reports

When planning a survey, it is easy to lose sight of the ultimate goal - high quality, meaningful reports. Make sure when you are planning that you have thought of what reports you want, and how you want to filter and cross-tabulate them. You can't filter based on a question you never asked!

Using Web Survey Creator for Web Surveys

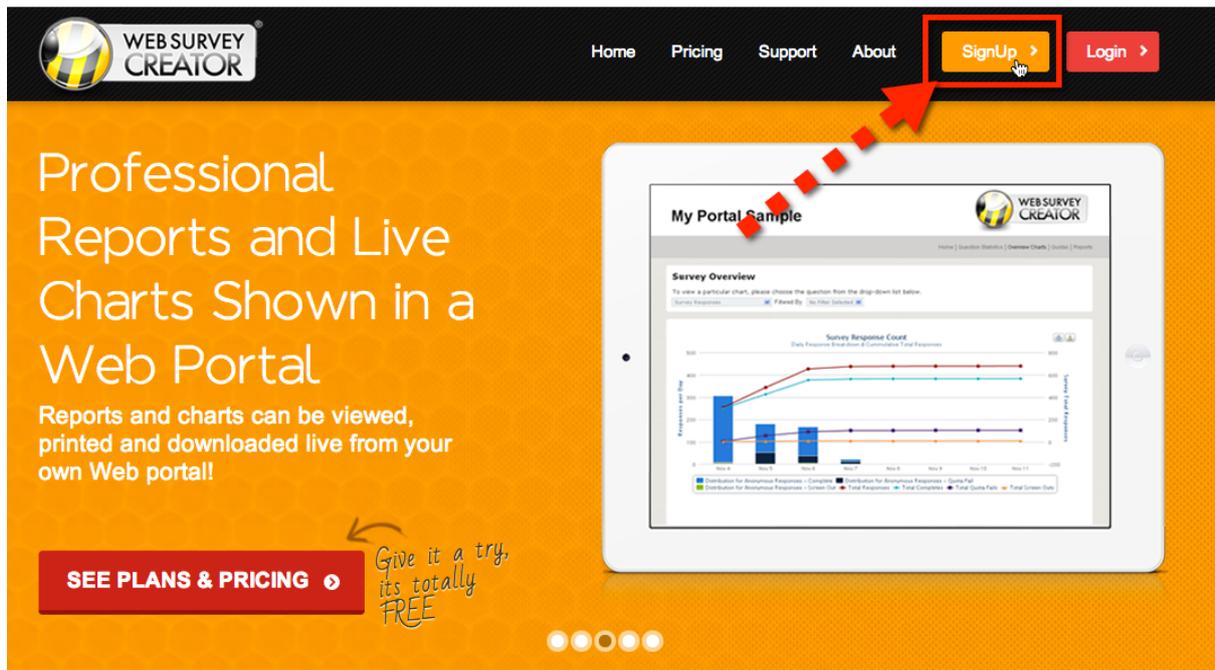
Creating a Web Survey can only be achieved by using the right tool for the job. While there are many options open to you, few if any provide a solution with the features of our Web Survey Creator (WSC) product. The remainder of this book will focus on creating Web Surveys using Web Survey Creator.

Opening WSC for the First Time

Web Survey Creator can be accessed from the following Web address using any modern browser:

<http://www.websurveycreator.com>

The first time you visit the site, you will need to set yourself up as a registered user. You can do this by clicking on the Signup menu at the top of the screen.



Professional Reports and Live Charts Shown in a Web Portal

Reports and charts can be viewed, printed and downloaded live from your own Web portal!

[SEE PLANS & PRICING](#)

Give it a try, its totally FREE

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My Portal Sample

Survey Overview

To view a particular chart, please choose the question from the drop-down list below.

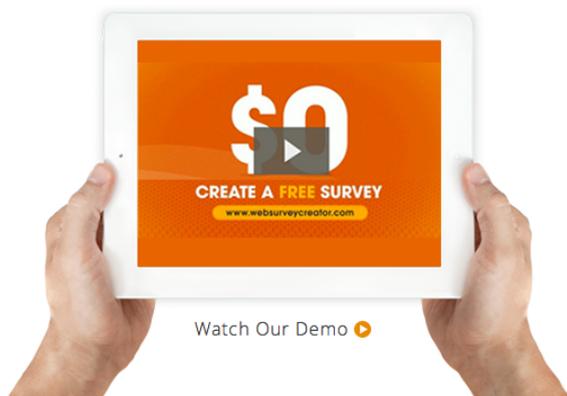
Survey Response Count

Percentage per Day

Survey Response Count

Percentage per Day

Legend: Distribution for Anonymous Responses - Complete, Distribution for Anonymous Responses - Done Full, Distribution for Anonymous Responses - Correct One, Total Responses, Total Completed, Total Correct Path, Total Screen One



CREATE A FREE SURVEY

www.websurveycreator.com

Watch Our Demo

Got 60 Seconds?

Get familiar with WSC in 60 seconds by watching our introductory video. Once you have seen what we do, sign up for free and try it for yourself. If you want to know more, check out these other videos.

[WSC for Market Research](#)

[WSC for CATI](#)

Take a closer look

Try our demonstrations below to see what you can do with Web Survey Creator – Have a look at the types of questions you can create, how they work on different devices, and the types of real-time online reports that can be used by you, your manager, or your clients...

You must choose which version of the software you wish to purchase. If you are not ready to purchase the software yet, you can choose the Basic Edition, which is free.

Click on the **Signup Now** button to begin the signup process.

| Basic Solo Simply 100% Free | Student Solo Individuals, Students | Professi Solo Our Most Popu |
|-----------------------------------|---|---|
| Free! | \$14 AUD/Month <small>Quarterly/Yearly...</small> | \$39 AUD/M <small>Quarterly/Yearly...</small> |
| Single User | Single User | Single User |
| 50 Respondents/Survey | Unlimited Respondents | Unlimited Respondent |
| Unlimited Questions | Unlimited Questions | Unlimited Questions |
| 50 Responses/Month * | 500 Responses/Month * | 2,000 Responses/Mon |
| | 1,500 Responses/Quarter * | 6,000 Responses/Quar |
| | 6,000 Responses/Year * | 24,000 Responses/Year |
| Signup Now | Signup Now | Signup N |

Fill in your details, and press the **Create Account** button.

You can optionally sign in using your Facebook credentials. This will mean that you won't need to learn yet another login – your Facebook login is all you need to get into your account. If you have Facebook open on your computer, when you go to Web Survey

Creator, it won't even need to ask you for your login details at all – it will know who you are and go straight to your surveys.

Activating your Account

You will be sent an Email to activate your account. This is to ensure you entered your email address correctly, and you can access that Email account. For ease of use, the system gives you 7 day's grace to activate your account, so you can use it immediately without waiting for the activation Email.

An unactivated account will have a warning at the top of the screen until activation occurs.



Where to get help

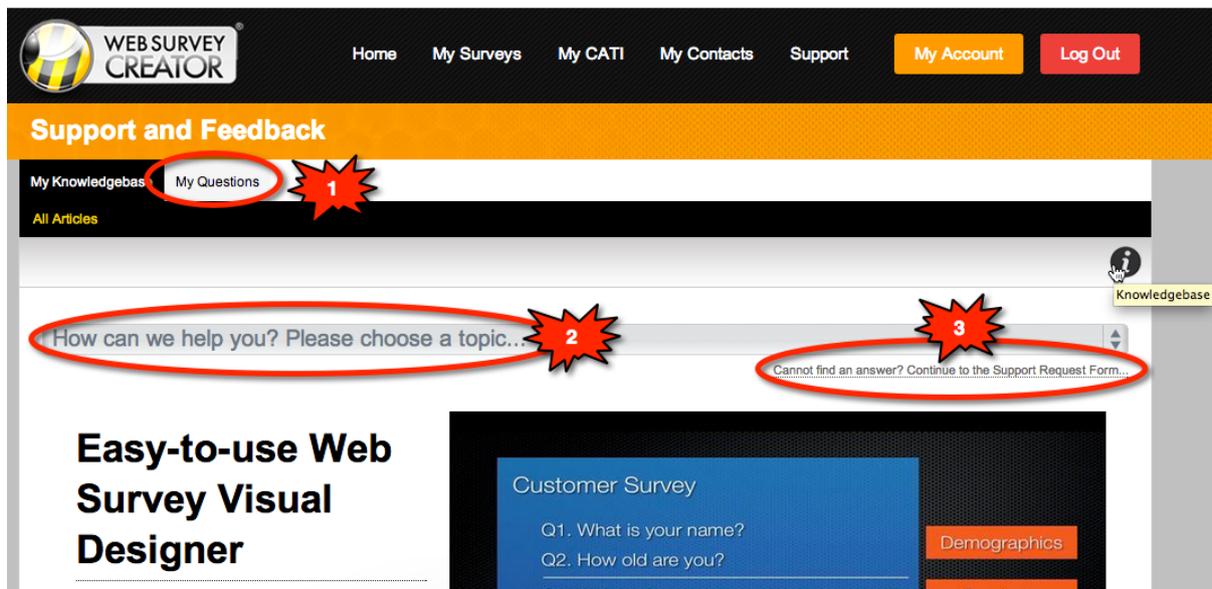
On-line Help

Online assistance can be found from the Support menu at the top of the page.



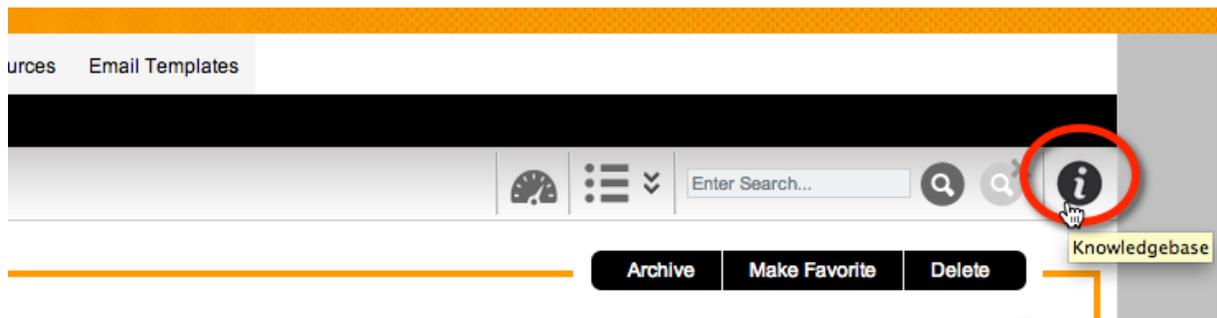
From within the Support area, you can:

1. See a listing of any questions you have previously asked, together with their status, and any answers given (you must be logged in to get to this tab)
2. Select a Help Topic to view
3. Go to the Support Request Form to enter a support request



Tutorials

Step-by-step tutorials are available on key areas of the software. These tutorials can be accessed by pressing the Information button on the toolbar from wherever you are in the software.

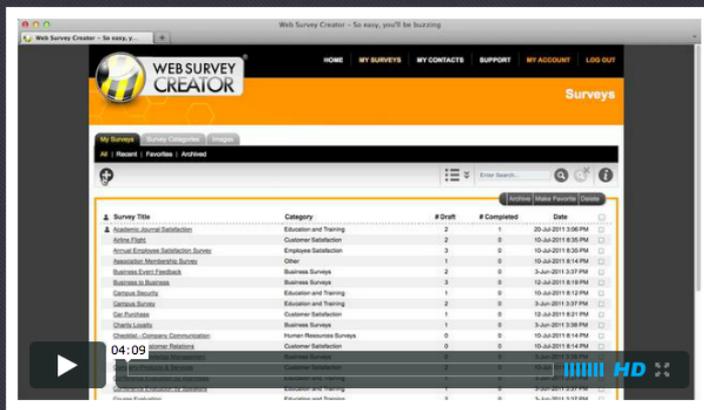


The tutorials cover key areas of the software, including areas covered in this manual.



Training Videos

Web Survey Creator is a survey creation tool. These videos show you everything you need to know to create surveys efficiently using this software.



Managing your surveys

1 year ago

This Web Survey Creator tutorial demonstrates how to manage your surveys through the My Surveys browse.

Key training areas:

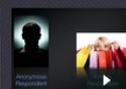
- Navigation within browses
- Filtering and sorting browser content
- Favorites and archived surveys
- Deleting surveys



Managing your surveys



Managing survey images



Managing your Contacts



My First Survey



Creating Flow Control



Collaborating on Surveys



Creating our first Survey

In this chapter, we will create our first survey using Web Survey Creator.

There are many different ways a survey can be created. This is the time to get into good habits and really start to use the power of the product.



Start with a Plan!

The key to any good survey design is planning. The approach you take to creating your survey will affect the quality of the end result.

Our first survey is going to be a Customer Satisfaction Survey with the following content:

The diagram illustrates the mapping of survey questions to categories. A central blue box titled 'Customer Survey' contains six questions, each followed by a horizontal line indicating an input field. To the right of this box are four orange buttons, each aligned with a question:

- Q1. What is your name? → Demographics
- Q2. How old are you? → Demographics
- Q3. Which of our products do you use? → Products
- Q4. How happy are you with our products? → Satisfaction
- Q5. How happy are you with our service? → Satisfaction
- Q6. Do you have any other comments? → Comments

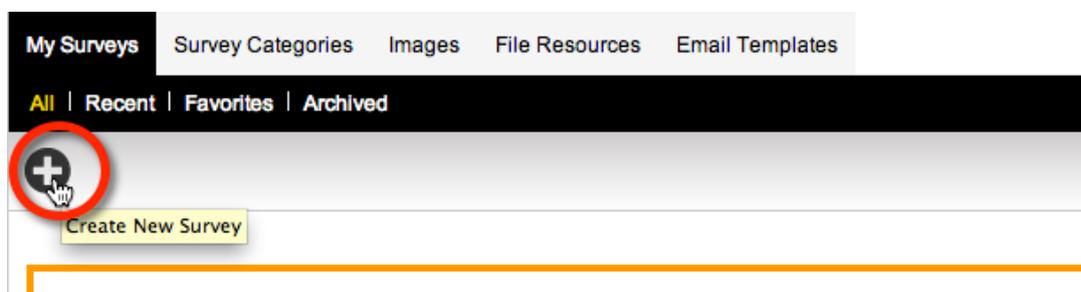
These questions naturally fall into a number of areas - Demographics, Products, Satisfaction and Comments.

While we could place all the questions in a single page, particularly for such a short survey, best practice is to separate similar questions onto different pages.

We will create each page, as we need it.

Creating A Survey

To create a new survey, we press the **Plus** button on the **My Surveys** Tab.



There are some choices we need to make:

1. Do we want to create a survey from scratch, or use a previous survey or a survey template as a starting point?
2. What do we want to name our survey?
3. What theme, category and language do we want to use?
4. What survey response type do we want (anonymous, with respondent list etc.)?

In our case, we are going to build the survey from scratch, we're going to call it **Annual Customer Satisfaction Survey** and we will place this survey in the **Customer Satisfaction** category.

Theme and language can remain at the default settings, and we are creating the survey as an anonymous survey (which is also the default setting).

WEB SURVEY CREATOR

Home My Surveys My CATI My Contacts Support My Account Log Out

Surveys Surveys > Create New Survey

My Surveys Survey Categories Images File Resources Email Templates

All | Recent | Favorites | Archived

First: Choose a method to Create Survey:

Please choose one of the following options and enter the details required to create a new Survey.

- Create a new Survey by copying an existing Survey
- Create a new Survey by using a pre-defined Survey Template
- Create a new Survey by starting from a blank Survey

Then: Enter Title of the new Survey:

Please enter the title of the Survey

Survey Title: Annual Customer Satisfaction Survey

Finally: Choose Theme, Category, Language and Response Type options

Select a survey theme, category and default language. Survey categories are used to help keep your Surveys organised and easier to find later whilst the default language will be the language the survey defaults to when first entered. If required, these options can be changed at a later date. Selecting a survey response type will automatically create the appropriate survey distribution for you. Additional distributions for different response types can be added at a later date.

Survey Theme: Basic White

Survey Category: Customer Satisfaction

Default Survey Language: English

Survey Responses Type: Anonymous

This type of response is perfect for surveys where you want a single generic link to be provided to anyone who wants to complete the survey. The best feature of this link is its simplicity. No tracking information exists in the link – everyone uses the same link and is completely anonymous. Respondents must complete the survey in a single sitting, as there is no way to get back to previously entered responses.

Create New Survey

When we save our survey details, we are immediately taken into the **Content Designer** for the survey.

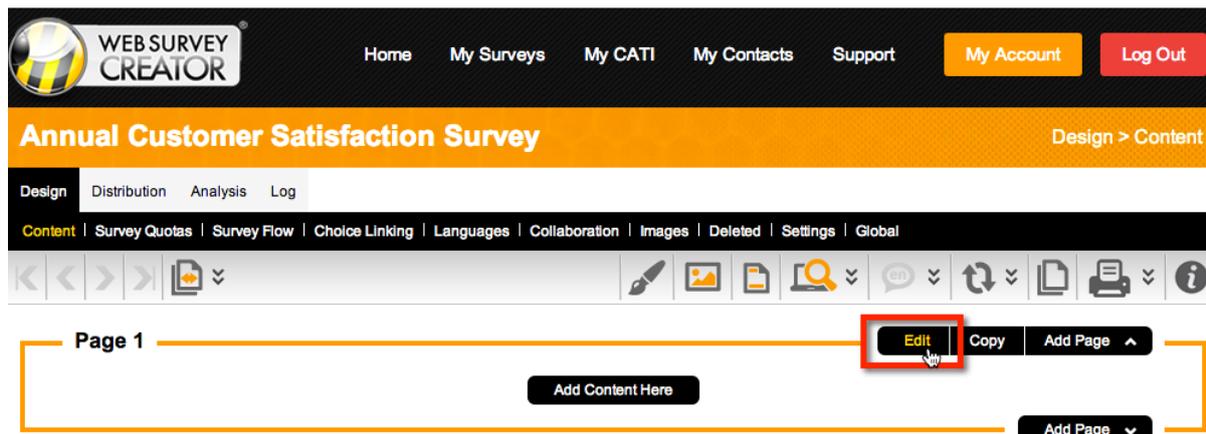
Adding Pages

Based upon our prior planning we know we will need 4 pages.

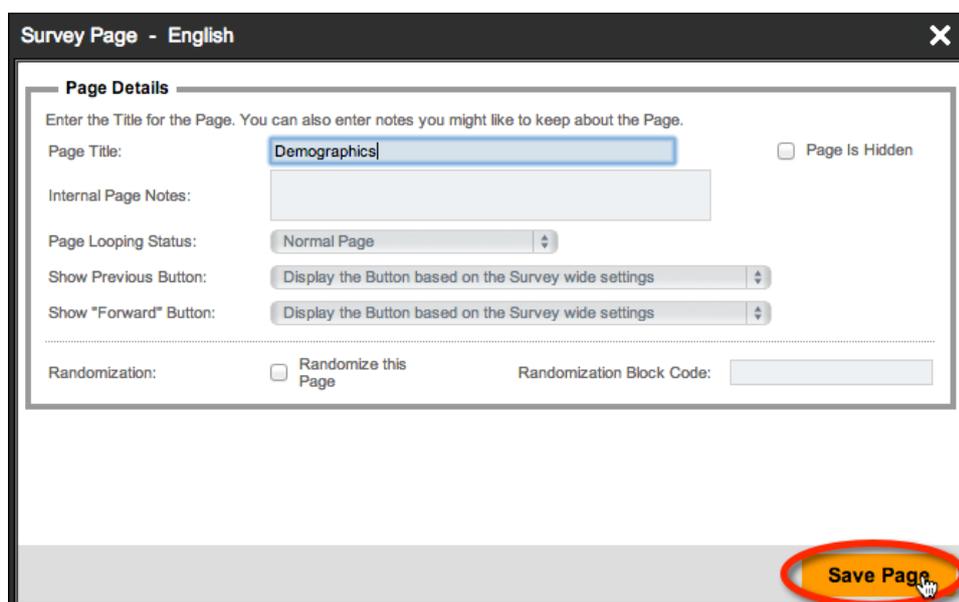
Our first page is created for us when the survey is created.

Pages are automatically named for us – this page is called **Page 1**. While this doesn't need to be changed, it is easy to change the name to **Demographics**.

We click the **Edit** button to enter our new page name.



Once we change the name of the page, we can press the **Save Page** button.

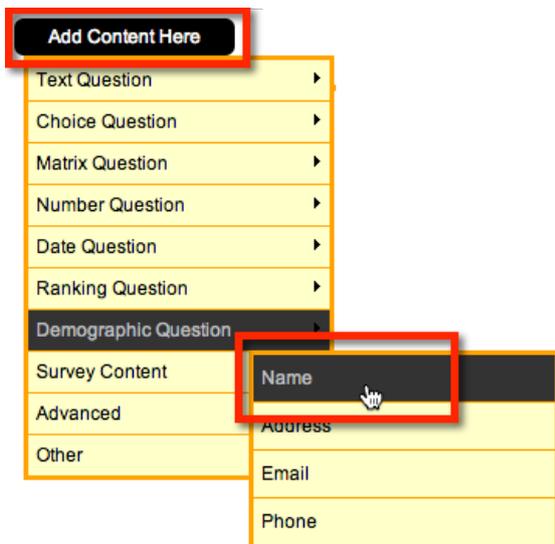


Adding our Name Question

We now need to start adding our questions, one at a time. Questions are added by pressing the **Add Content Here** button, and then choosing **Name** from the **Demographic Question** menu.

Whenever adding any content to a survey, we always start by choosing the type of content we want to add.

WSC has a number of specialized question types for certain common questions like "Name". If we need to ask a respondent's name, rather than using a text question, we can use a specific demographics question.



When we select the **Demographic Question** type and choose **Name**, we see specific formatting that can be selected for this type of question.

Two stacked panels from a survey design tool. The top panel is titled "Question Text" and contains a text input field with the placeholder text "Enter the text of the Question to be asked." and the example text "What is your name?". The bottom panel is titled "Demographics: Name" and contains instructions: "You can choose which name fields to include in your survey by selecting from the dropdown below. Labels for each field are shown below." Below the instructions are three input fields labeled "Title", "First Name", and "Last Name". To the left of these fields is the text "Include name details using format:". A dropdown menu is open, showing four options: "Title, First Name, Last Name" (which is selected and has a checkmark), "First Name, Last Name", "Title, Name", and "Name".

We'll make this question mandatory, and save it by clicking **Save Content**.

Two stacked panels from a survey design tool. The top panel is titled "Mandatory Options" and contains a checked checkbox labeled "Question is Mandatory and must be completed". Below this is a text input field for "Displayed Error Message when answer is not entered:" with the text "This question is mandatory and you must complete an answer." The bottom panel is titled "Question Tags" and contains a text area for entering tags. Below the text area is a "Save Content" button with a mouse cursor pointing at it.

The question is shown in the Content Designer in the same layout as it will appear in the survey.

Demographics

Add Content Here

⚠ Question is Mandatory and must be completed for respondents to move forward

What is your name?

Add Content Here

Notice how much better the question now looks compared to a single text question. We are now going to get well-formatted names entered into our survey.

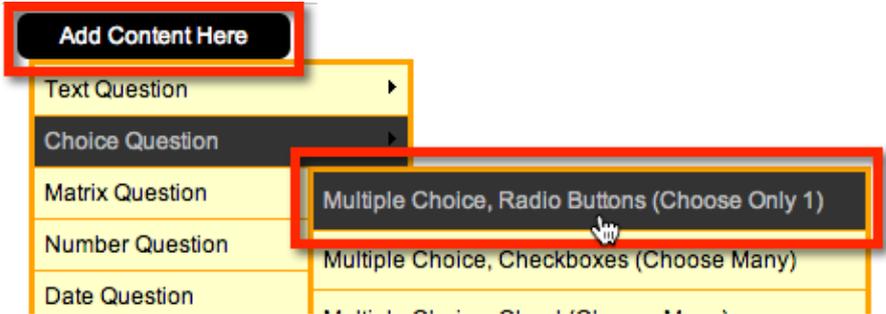
Adding our Age Question

Let's move onto the Age question. We want to add it after the name question, so we click on the **Add Content Here** button below the name question.

We need to choose content type again. Age is often set up incorrectly as a number. While asking for your exact age is technically correct, how many people want to tell you that, and do we actually need to know the exact age?

We use a different type of question – instead of getting someone to enter their numeric age, we will give them a range of age groups to choose from.

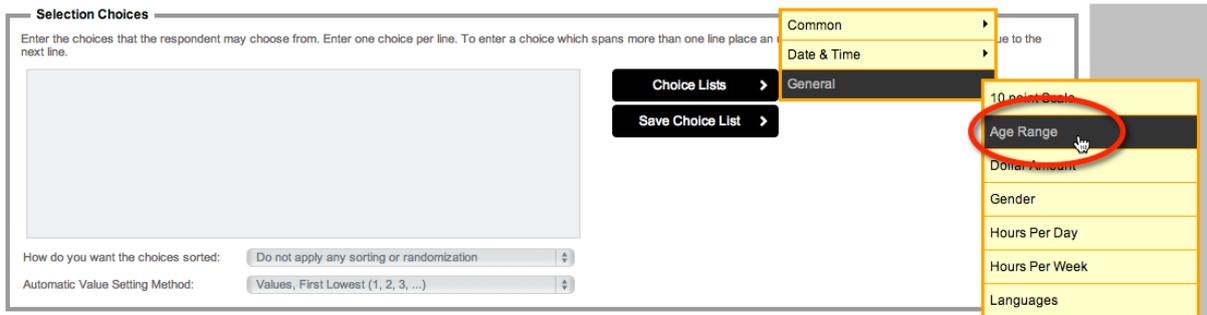
This means we need to select a **Choice Question**. We want to show the choices as buttons on the screen, and of course someone can only be in one age group, so we'll select "Multiple Choice, Radio Buttons (Choose Only 1)".



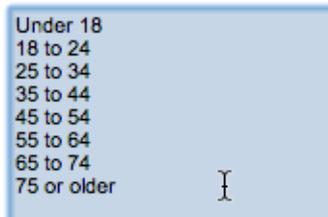
We enter the question text "How old are you?" and then we need to enter the **selection choices** for the question.

These need to be entered one per line.

Fortunately we have access to pre-built choice lists, and an **Age Range** is one of the lists we can use.



This list looks good, but we'll extend the ranges shown with one additional range for 65 to 74 year olds.



We won't make this question mandatory, because people may not wish to tell me their age. We can therefore simply save the content.

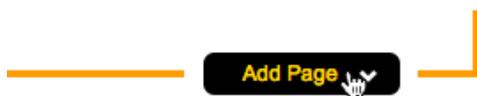


Adding our Products Question

Adding the products question is very similar to adding the age question, but with a few differences.

We want to place it on the second page of the survey.

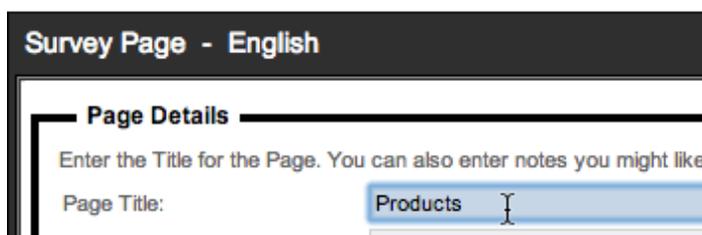
We can add a page from the toolbar, or by simply clicking *Add New Page Here* on the bottom of our first page.



By default it is called Page 2, but as before, we can edit this.



We will change this page's name to "Products".



Our company produces electronic goods, so the list of products we will show are electronics goods.

Of course our customers could buy multiple different products from us, so we **MUST** ensure that this is a “choose many” question type.

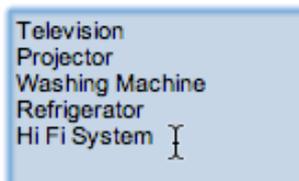
The importance of picking the correct type of choice question can be clearly seen in this example.

The #1 error in survey design is choosing the wrong type of choice question. Always ask yourself, “Does it make sense that I can pick more than one choice?”

In our example, being able to select multiple products makes sense, but it is impossible for me to be in multiple age groups.

We add the question using the steps we have already learnt:

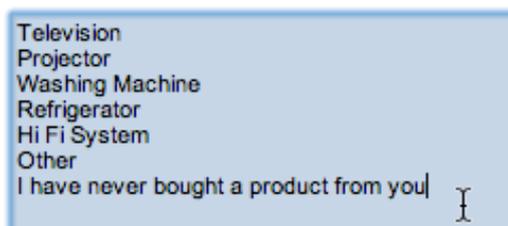
1. Click **Add Content Here**
2. From the drop-down menu, choose **Choice Question -> Multiple Choice, Checkboxes (Choose Many)**
3. Enter our question “Which of our products have you used?”
4. Enter the choices:



Let's also add two additional options:

1. “Other” for any of the minor products we sell that are not in the list; and
2. “I have never bought a product from you” to ensure people who never bought from us have a valid option to pick.

The **Selection Choices** will therefore look as follows:



After we save this question, we can see a respondent can choose multiple answers.

Which of our products have you used?

- Television
- Projector
- Washing Machine
- Refrigerator
- Hi Fi System
- Other
- I have never bought a product from you

We can make a couple of modifications to these values to enhance the user experience. Let's edit this question.

Products Edit Merge Previous Move Previous Copy Move De

Add Content Here

Which of our products have you used?

- Television
- Projector

Edit **Mo**

We'll edit the "Other" choice.

Selection Choices

Edit the current Choice that the respondent may choose from. You can also choose to set attributes for the Choice such as its visibility.

Note: When Editing Selection Choices any changes that are made are updated immediately and cannot be undone or cancelled.

- Television (Value: 1)
- Projector (Value: 2)
- Washing Machine (Value: 3)
- Refrigerator (Value: 4)
- Hi Fi System (Value: 5)
- Other (Value: 6)**
- I have never bought a product from you (Value: 7)

Edit Choice **Add New Choices**

Delete Choice **Update All Choices**

Move Choice Up **Edit Choice Images**

Move Choice Down

We will indicate that it is an "Other, please specify" option.

Edit Selection Choice - English

Edit Selection Choice

Edit the current Choice that the respondent may choose from. You can also cho

Other

Choice Value:

Choice is Hidden

Choice is the Default and is Selected

Choice is Exclusive

Choice allows an "Other (Please Specify)" Option

We save this change by clicking the **Save Choice** button.



We will also edit the "Never bought" choice.

Selection Choices

Edit the current Choice that the respondent may choose from. You can also choose to set attributes for the Choice such as its visibility.

Note: When Editing Selection Choices any changes that are made are updated immediately and cannot be undone or cancelled.

| | | |
|---|----------------------|----------------------|
| Television (Value: 1) | Edit Choice > | Add New Choices > |
| Projector (Value: 2) | Delete Choice | Update All Choices > |
| Washing Machine (Value: 3) | Move Choice Up | Edit Choice Images > |
| Refrigerator (Value: 4) | Move Choice Down | |
| Hi Fi System (Value: 5) | | |
| Other (Value: 6) [Other (Please Specify)] | | |
| I have never bought a product from you (Value: 7) | | |

We will make this choice exclusive. This means whenever this option is checked, all other options will be unchecked automatically.

Edit Selection Choice - English

Edit Selection Choice

Edit the current Choice that the respondent may choose from

I have never bought a product from you

Choice Value:

Choice is Hidden

Choice is the Default and is Selected

Choice is Exclusive

Choice allows an "Other (Please Specify)" Option

These values will now have specific behaviors based upon these new settings.

Adding our Satisfaction Questions

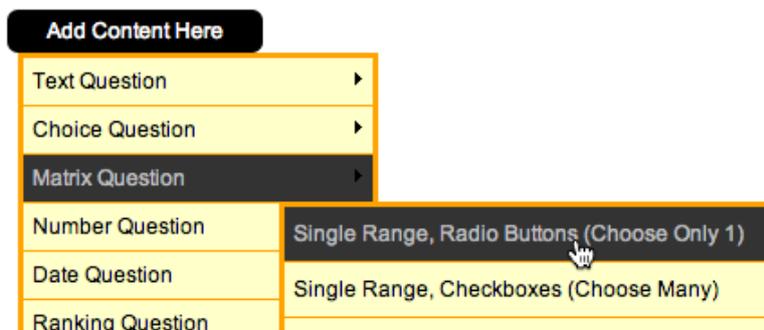
We will add a third page to our survey, and then add our questions about happiness:

- How happy are you with our products?
- How happy are you with our service?

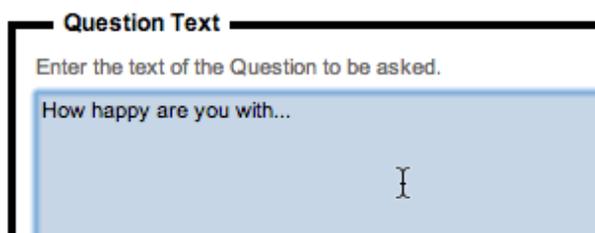
These questions could of course be created as two Choice questions. Respondents could choose one of the following happiness choices.

- Very Happy
- Slightly Happy
- Undecided
- Slightly Unhappy
- Very Unhappy

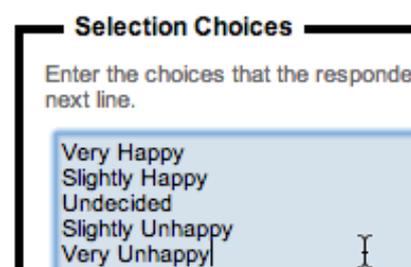
However, this is another situation where with a little thought we can greatly improve the look and functionality of our survey. Both these questions have the same list of choices, so we can put them together in a **Matrix Question** Type.



The question can be changed to “How happy are you with...”



We can enter the choices for the matrix, just like the choices are entered for standard choice questions.



“Our Products” and “Our Services” can then be added as rows.

Question Rows

Enter the questions that the respondent will next line.

Our Products
Our Services

After we save the question, we can see in the designer how the matrix is a compact way of showing these two questions.

How happy are you with...

| | Very Happy | Slightly Happy | Undecided | Slightly Unhappy | Very Unhappy |
|--------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Our Products | <input type="radio"/> |
| Our Services | <input type="radio"/> |

Adding our Comments Question

The last question we want to add is our comments question. We will:

1. Add our **Comments Page**
2. Click **Add Content Here**
3. Choose **Text Question -> Multiple Lines of Text**

Add Content Here

Text Question

Choice Question

Matrix Question

Number Question

Single Line Text

Multiple Lines of Text (Comments, Notes, etc)

4. Enter our question “Do you have any other comments?”
5. We will also add some formatting to give respondents a bit more space – lets make the comments go across the page, and show 5 lines for them to enter their comments.

Style and Formatting Options

Please choose from the following Style and Formatting options.

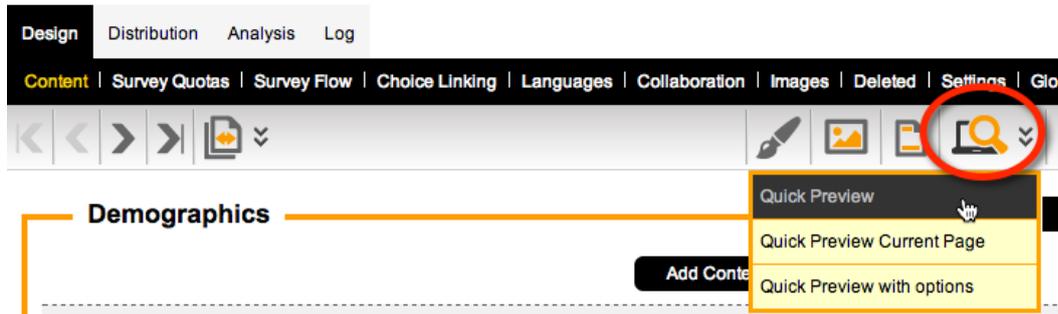
Width of the Input Box: 100 Percent (%)

Number of Rows to Display: 5 Lines

Fantastic! – Our survey is done.

Previewing the Survey

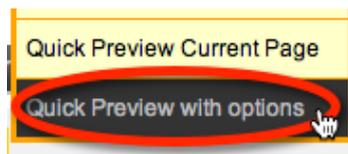
To see how the survey looks, we can preview it by selecting the **Quick Preview** option.



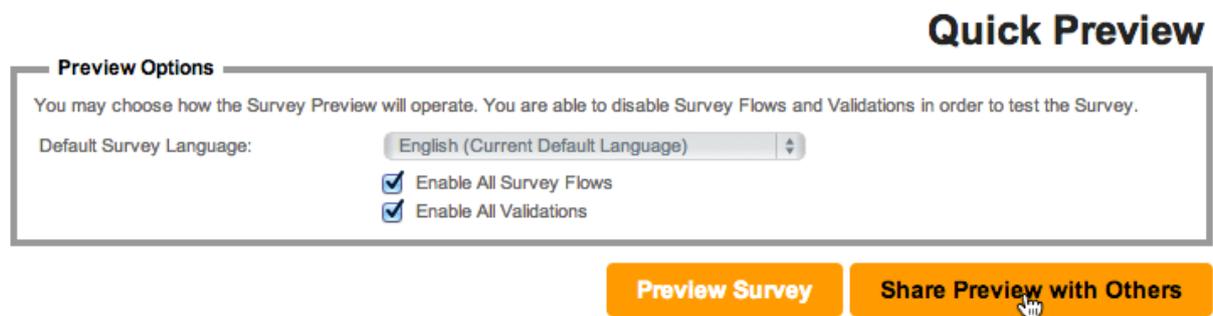
Previewing is particularly useful for testing logic like mandatory questions, and the exclusive and other settings we added to our product list question.

Showing a preview to other people

If you need to show the preview to someone else, they don't need to have a login for Web Survey Creator. All you need to do is select **Quick Preview with options**.



One of the options is to **Share Preview with Others**.



Multiple Email addresses can be entered (one per line) and a link to the preview will be sent to each of them.

Share Survey Preview with Others ✕

Recipient Details and Email Message

Enter the details of each person you want to email the Survey Preview link to. Enter each email address on a new line. If the Distribution being Previewed is a Respondent based Distribution each person will be sent a unique link that only they can use.

Recipient Email Addresses:

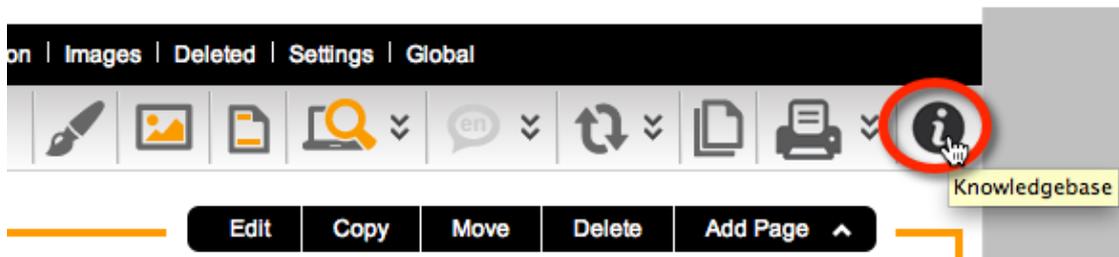
Email Subject:

Email Message:

Send Email

Step-by-step Video

If you would like to see how this first survey has been built, you can view it in our step-by-step video. You can access this video online by pressing the **Knowledgebase** button on the toolbar while working on survey content.



The video is called **My First Survey**.

Using advanced formatting in your Surveys

Formatting can be added to surveys through the use of **Content Tags**

What are Content Tags?

Content Tags are simply a means of incorporating standard HTML functionality in survey content, without exposing the full range of HTML to a survey designer (doing the later would open the system to all sorts of security and layout issues).

Where can Content Tags be used?

Content Tags can be used anywhere you use standard text content in your surveys. This includes:

- Text Content blocks
- Question Text
- Choice Text

Most of the time, straight text will suffice in these areas, but Content Tags can be useful if you want to:

- Place emphasis on part of the content
- Add small help text below your question
- Add Bullet Points
- Use color in your text
- Place an image in some text content

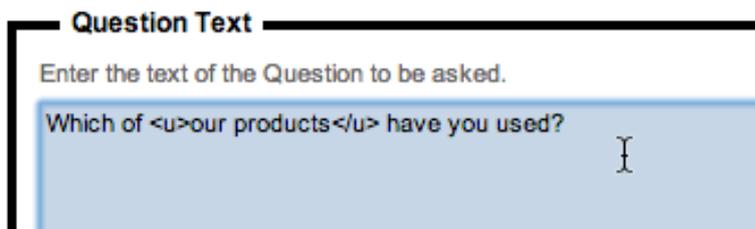
Listing of Content Tags and their Usage

| Tag Combination | Description | Usage |
|--|---|---|
| <h1></h1> | H1 | <h1>My Heading</h1> |
| <h2></h2> | H2 | <h2>My Sub Heading</h2> |
| | Bold | This is bold but this isn't |
| | Bold | This is bold but this isn't |
| <u></u> | Underline | <u>This is underlined</u> but this isn't |
| <i></i> | Italic | <i>This is italicized</i> but this isn't |
| <ol type:style> | Ordered Lists - with Css Ordered List Style e.g upper-roman | OneTwo |
| <ul type:style> | Ordered Lists - with Css Unordered List Style e.g square | BananaApple |
| <nobold></nobold> | No Bold - Turns of Bold where the current style is Bold | This is in Bold <nobold>but this is not</nobold> but this is again. |
| <small></small> | Equivalent to font-size:small | <small>This is small</small> but this isn't |
| <webhelptext></webhelptext> | Equivalent to font-size:x-small; font-style:italic | <webhelptext>This is small and italicized</webhelptext> |
| <link:mailto:emailaddress>Text</link> <link:mailto:emailaddress nostyle>Text</link> | Link for Email Address - with no style | <link:mailto:fred@me.com>Mail to Fred</link> |
| <link:url>Text</link> <link:url nostyle>Text</link> | Link from http or https based URL - with no style | <link:http://www.me.com>Click to Go To Me</link> |

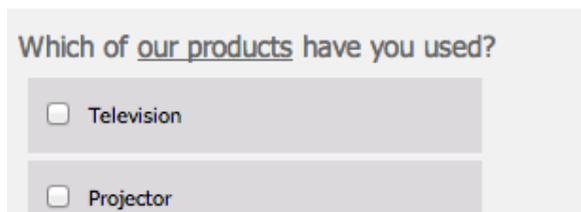
| Tag Combination | Description | Usage |
|--|--|---|
| <image:url> <image:url tooltip> | Image from http or https based URL - jpeg/gif/png - with Tooltip | <image: http://www.me.com/cat.jpg> |
| <image:filename> <image:filename tooltip> | Image from Person's File - jpeg/gif/png - with Tooltip | <image: cloud.jpg> |
| <font:text> | Font using CSS Font Style | <font: italic bold 22px courier>Text |
| <color:#hex> | Color using HEX Name | <color:#334455>Text</color> |
| <color:name> | Color using Font Name | <color:Red>Text</color> |
| <colour:#hex> | Color using HEX Name (English Spelling) | <colour:#334455>Text</colour> |
| <colour:name> | Color using Font Name (English Spelling) | <colour:Red>Text</colour> |
| <strike></strike> | Strike through | <strike>This line does not matter any more</strike> |
| <mark></mark> | Highlight Marker Pen | <mark>Highlight this text!</mark> |
| | Superscript ^{Superscript} | ^{Superscript} |
| | Subscript _{Subscript} | _{Subscript} |

Example of Content Tag usage

A simple example of using content tags would be to change the text of the products question as follows:



The result of this would be to highlight the words “Our Products” through an underline.



Survey Themes

Let's now take a look, in general terms, how some of the theme structures in WSC work and what sort of capabilities are available for designing themes.

Components

Each theme in WSC consists of a number of components that work together to allow the survey to be rendered in a consistent manner.

The key elements are standard html styles (css) and images. There are three (3) styles sheets that are available.

1. Standard
2. Tablet
3. Mobile

Each style sheet essentially contains the same series of classes and is only included in the page for the device that it is appropriate for. That is, a desktop PC will receive the Standard style sheet whereas an iPad will receive the Tablet style sheet.

When attached to a simple survey the “White” Theme will look similar to this:

Theme Sample

Progress 50%

Please enter some text

Please pick which one of these fruits that you like the most

Apple
 Banana
 Pear
 Orange
 Apricot
 Other

What things do you like to watch?

Tennis League Motor Racing
 Soccer Netball Other
 Rugby Basketball
 AFL Horse Racing

Next

Powered By [WebSurveyCreator](#)

Structure of Theme

The structure of this survey is straightforward. It consists of the following pieces:

1. Banner Zone
2. Percentage Zone
3. Question 1
4. Question 2
5. Question 3
6. Next Button
7. Powered By Zone

You will notice that each of the questions is split into a separate visual region separating it from other questions. Further the choice questions have specific styles for selection of individual choices. They also have styles for highlighting (hovering) over individual choices.

The same survey with a simplified theme (using background colours to highlight CSS regions) is shown here. In this example the banner image and percentage bar image have been removed

BANNER IMAGE ZONE

PERCENTAGE ZONE

Please enter some text

Please pick which one of these fruits that you like the most

Apple

Banana

Pear

Orange

Apricot

Other

What things do you like to watch?

| | | |
|---------------------------------|---------------------------------------|---|
| <input type="checkbox"/> Tennis | <input type="checkbox"/> League | <input type="checkbox"/> Motor Racing |
| <input type="checkbox"/> Soccer | <input type="checkbox"/> Netball | <input type="checkbox"/> Other <input type="text"/> |
| <input type="checkbox"/> Rugby | <input type="checkbox"/> Basketball | |
| <input type="checkbox"/> AFL | <input type="checkbox"/> Horse Racing | |

Next

Powered By: WebSurveyCreator

Specific Styles

There are specific styles for each of the areas that have colour in the sample image. In addition there are a number of nested styles so that very complex control over these regions can be rendered.

For example for a specific question there are a number of DIVS with attached styles that nest.

```
<body class="wsc_body">
  <div id="SurveyPanel">
    <div class="wsc_background">
      <div class="wsc_mainbody">
        <div class="wsc_mainbodyzone">
          <div class="wsc_surveyzone">
            <div class="wsc_pagezone">
              <div class="wsc_question-zone">
```

This structure allows quite complex styles to be created.

Question Styles

At the point of the question there are additional styles that are available.

For example, take a look at this question:



It consists of styles for the label text (`wsc_labeltext`) and styles for the input control (`wsc_textfield`).

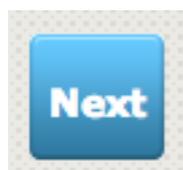
The style `wsc_textfield` actually consists of a large number of related styles that are used to manage hovered, focussed, disabled and normal states that can occur through the use of the control.

Similar styles are used for other types of standard input controls such as checkbox and radio buttons that are used in choice based questions.

More complex questions may also have other styles that may be altered.

Other Styles

Other areas of the rendered survey page will use other styles. For example, take a look at this control:



It is actually made up of at least three (3) styles that work co-operatively to show the button.

Percentage Bar and Banner Images

In areas such as the percentage bar and banner there are a number of images that are used to build a percentage bar or banner image on the fly. These images are used as the basis for the construction of the completed image and are layered together with text (if required) to build the complete image.

When adjusting styles in WSC for these areas it may be required to alter the images – perhaps giving them a shorter height or shorter width depending on the needs

Survey Flows

All but the most basic Web Surveys require some form of branching or page skipping. This is known in Web Survey Creator as “Flow Control”.

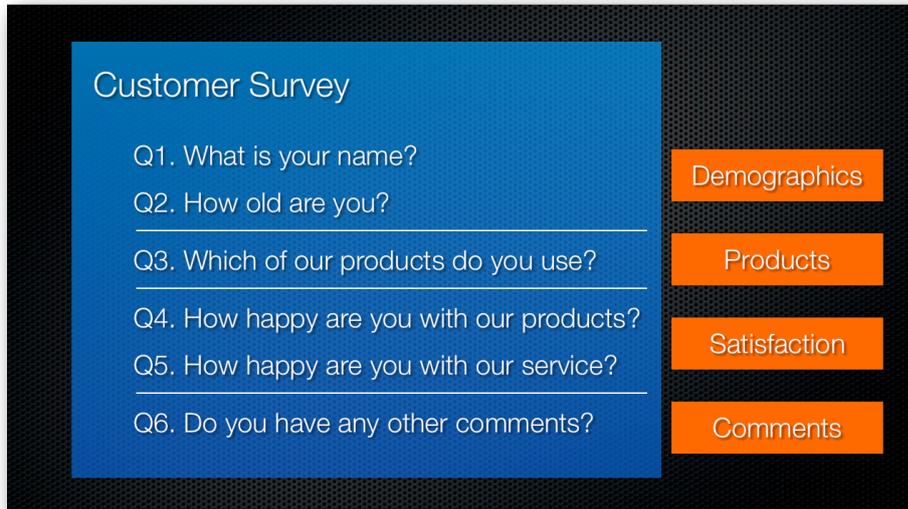
In this chapter, we will look at how to add flow control to your surveys.



What are Survey Flows?

The best way to understand flows is to look at an example. We will use the **Customer Satisfaction Survey** we created in the previous Chapter.

The basic structure of that survey is as follows:

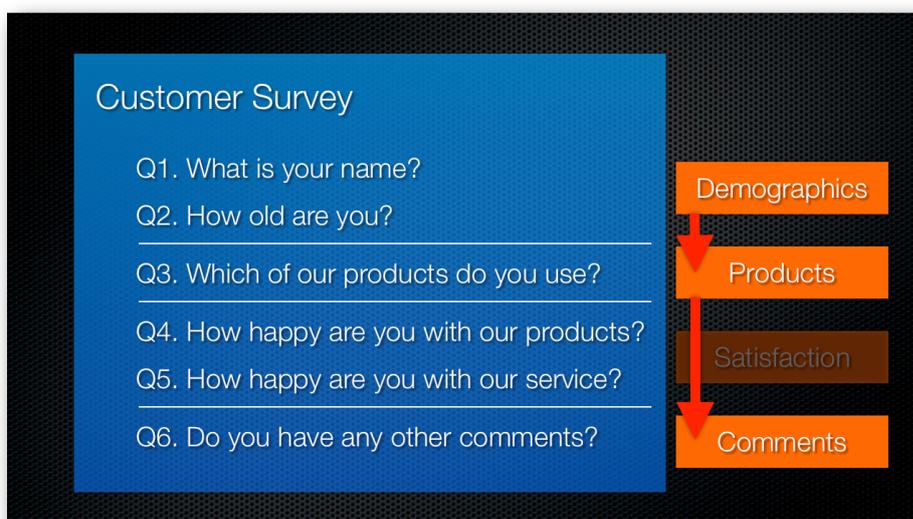


We broke this survey into a number of pages – Demographics, Product, Satisfaction and Comments. In this survey, a respondent currently answers the questions on each page, one page at a time.

An example of a survey flow is skipping the satisfaction page and jumping from the products page to the comments page.

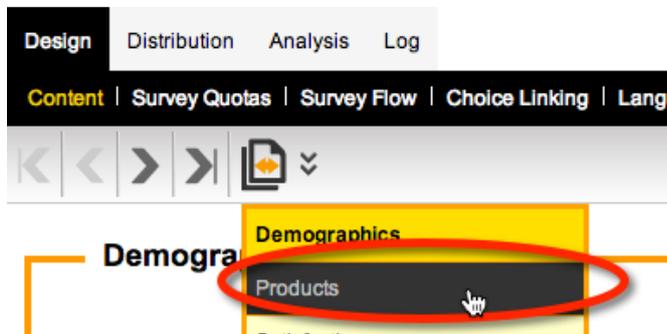
Example of a needed Flow in the Satisfaction Survey

In our survey the products question includes a choice that indicates the respondent has never bought a product from our company. If they have never bought a product, it makes sense that they will not be able to answer any questions about our products and service. We will therefore skip those questions, and go straight to the comments question.



Creating a Survey Flow in Web Survey Creator

Let's open our Customer Satisfaction Survey in Web Survey Creator, and go to the second page to have a look at the product question.

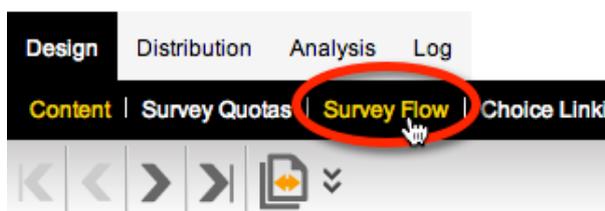


We can see that there is a Choice called "I have never bought a product from you".

A screenshot of the 'Products' question in the survey. The question is 'Which of our products have you used?'. The choices are: Television, Projector, Washing Machine, Refrigerator, Hi Fi System, Other (with a text input field), and 'I have never bought a product from you'. The 'I have never bought a product from you' choice is selected with a checked checkbox.

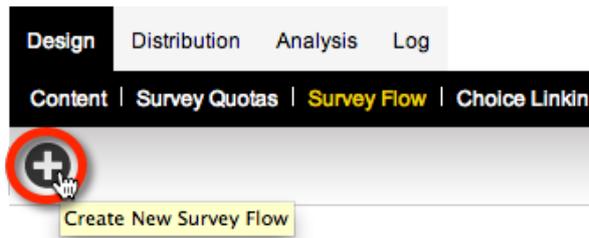
This will be the choice that, if chosen, should hide the third page in our survey.

To add flow control to our survey, we click on **Survey Flow** from under the **Design** tab.



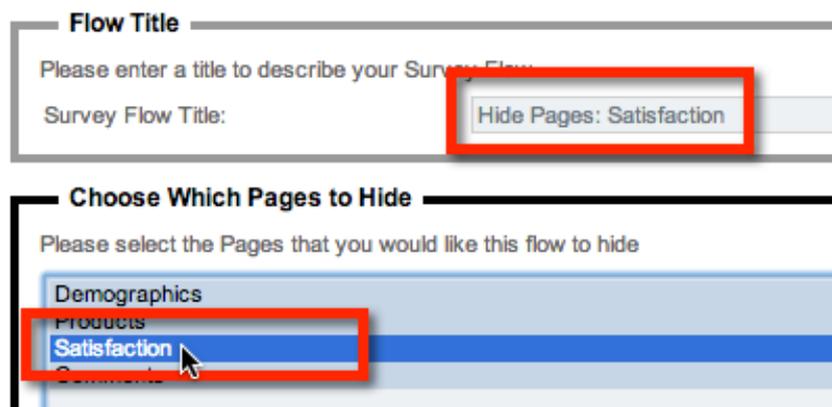
There are currently no flows set up in this survey.

We click the **Add** toolbar button to add a new flow.



The first step in setting up a flow is to choose the page or pages that will be hidden by the flow. In our example, we want to hide the satisfaction page.

Note that the **Survey Flow Title** is automatically updated for us.



We save the flow by pressing the **Save & Continue to Add Conditions** button.



Flow Control Conditions

There are two parts to any flow:

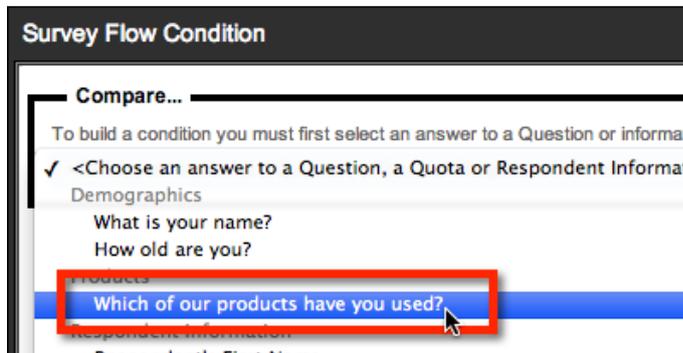
1. Choosing the Pages we want to hide
2. Setting the Conditions that when passed will hide the page

We have already set up the first part of our flow - now we need to set our conditions.



Note that only questions that appear before the page we want to hide are selectable in our conditions.

We want to choose the question “Which of our products do you use?”

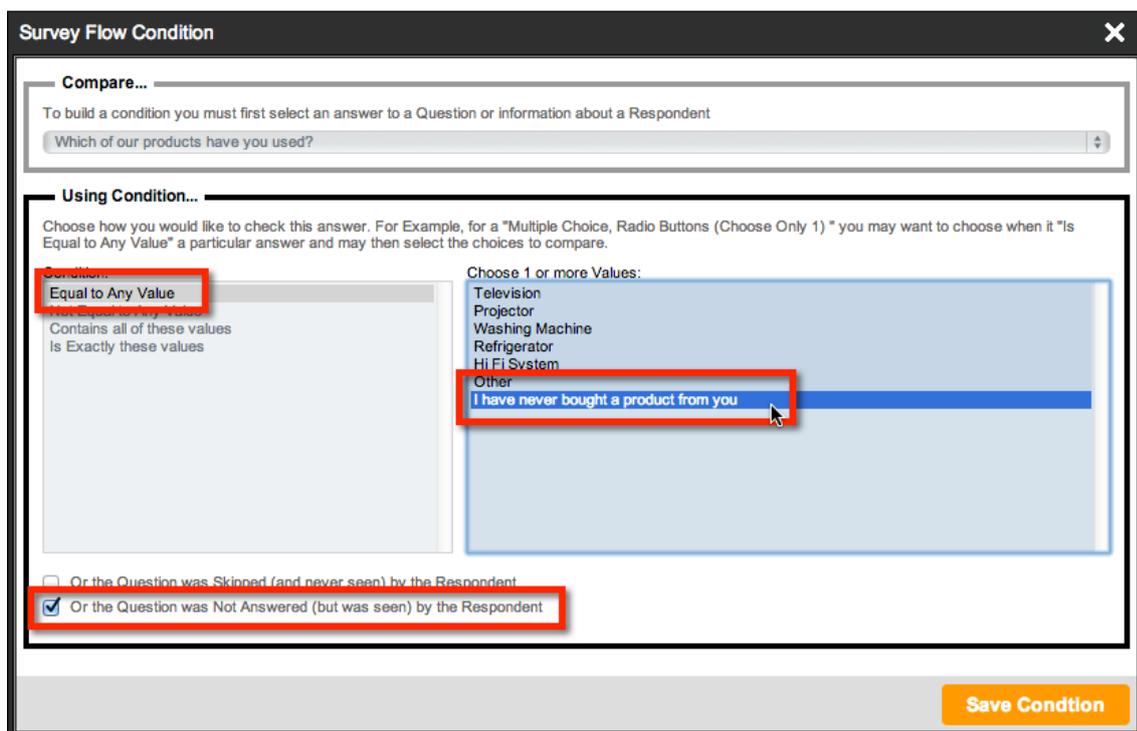


Based upon the Choices within this question, we are shown the condition types and choice values we can use in our condition.

We want to hide the page if the answer to this question is equal to “I do not use any products”.

If this question is flagged as non-mandatory, it would be possible for a respondent to not choose any answer. We will assume an unanswered question is the equivalent of saying that they don't have any of our products.

Therefore, we want to indicate that the condition is still met if the question is not answered.

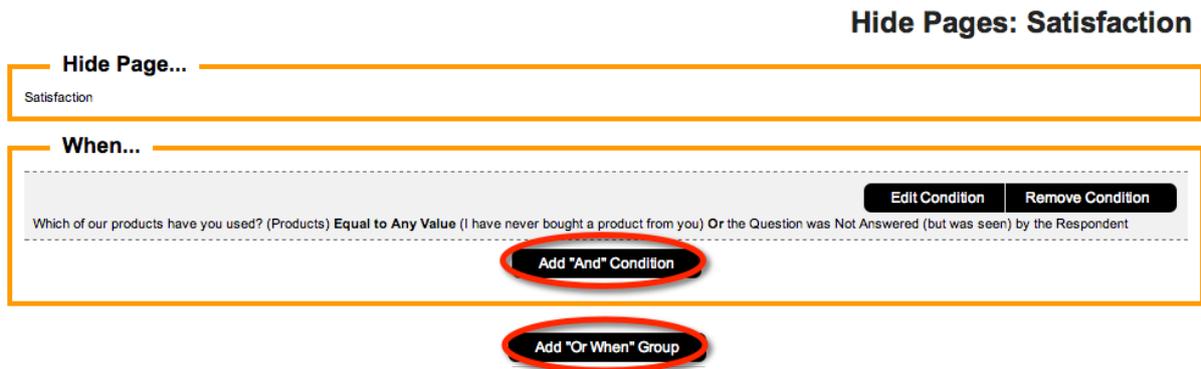


We can save the condition by pressing the **Save Condition** button.

That's all we need to do for our example.

Conditions with multiple rules

Once we have entered our condition, the survey flow editor looks as follows:



As you can see, “and” and “or” conditions can both be added to create a more complex condition if needed in the future.

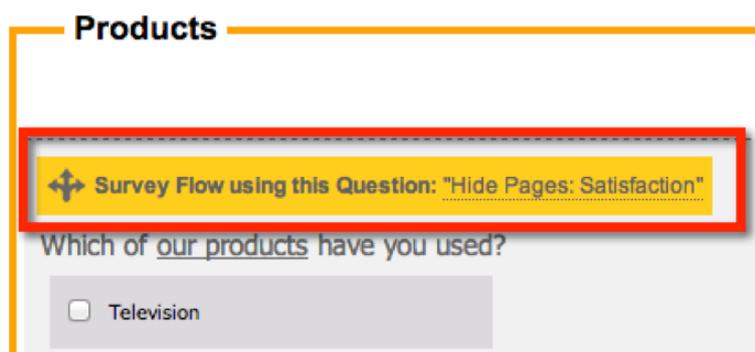
Returning to the Survey Design

We can click **Content** under the **Design** tab to jump back to our Survey content.



If we go through the pages of the design, we can see that the flow is flagged in two places:

On the question used in the flow as show here:



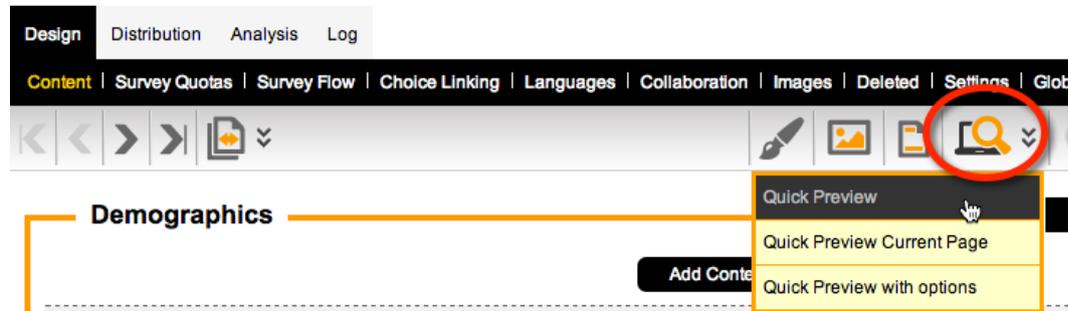
And on the page that will be hidden by the flow shown here:



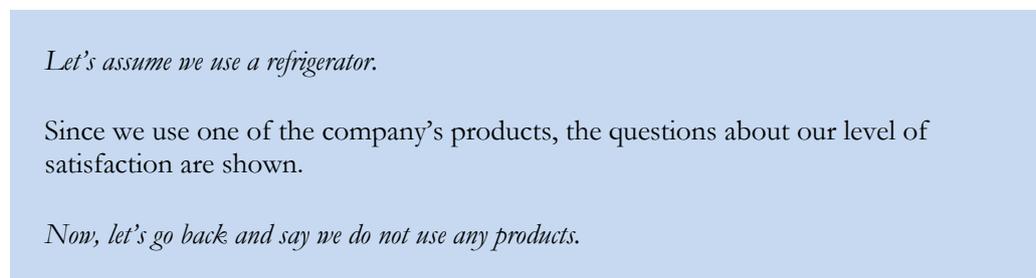
This makes it easy to see where flows are being used, and a quick way to jump to the flow itself should we need to change it.

Testing the Flow

We need to preview our survey to check if the flow is working.



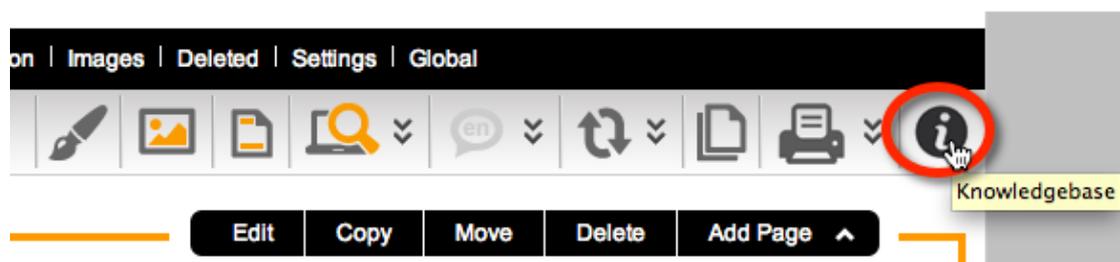
To confirm the flow is working, we can try the following test:



Great – our flow is working as we intended.

Step-by-step Video

If you would like to see how this flow has been built, you can view it in our step-by-step video. You can access this video online by pressing the **Knowledgebase** button on the toolbar while working on flows.



The video is called **Creating Flow Control**.

Data Piping

Data Piping allows you to pass respondent and response information into survey content.

This makes it possible to personalize the survey, or customize survey content based upon an individual respondent's answers.



Improving our Customer Satisfaction Survey

The best way to understand data piping is to look at an example. We will use our *Customer Satisfaction Survey* for this example.

We already have the following question in this survey:

Which of our products have you used?

- Television
- Projector
- Washing Machine
- Refrigerator
- Hi Fi System
- Other
- I have never bought a product from you

If a respondent chooses one or more products, they are asked how they rate our products and services:

How happy are you with...

| | Very Happy | Slightly Happy | Undecided | Slightly Unhappy | Very Unhappy |
|--------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Our Products | <input type="radio"/> |
| Our Services | <input type="radio"/> |

At the moment, the question is very generic:

How happy are you with...

Using **Data Piping** we can have a much more specific question that reminds the respondent what they entered.

Setting up Data Piping

Step 1: Create an “Access Code”

Data Piping can use any question that has been set up with an **Access Code** as the source of the data piping data. We want to use the products question as the source of the data piping data. We can click the **Edit** button to edit this question:



The Access Code can be entered for the Question. We can enter any alphanumeric characters for this code:



We have called it *MYPRODUCTS*. Now we can save the question, and it is ready to be used.

The code we are using for this question is shown in the designer.



Step 2: Using an “Access Code” in our Content

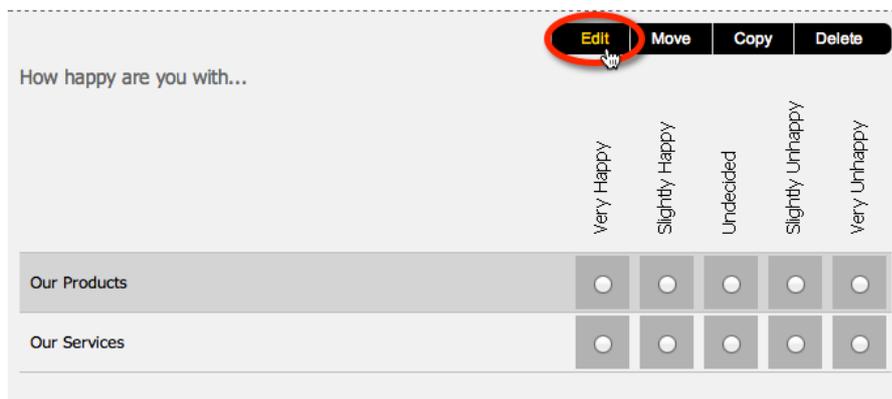
Now that we have set up our Access Code, using it in the survey content is as simple as entering the code as part of our survey text.

The code must be entered in the format:

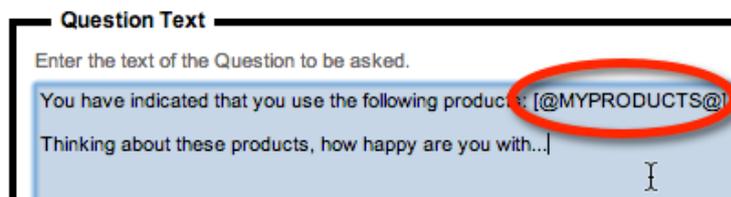
[@ + ACCESS CODE + @]

So, in our example, the code we would need to use would be:

We will edit our satisfaction matrix to add this code:

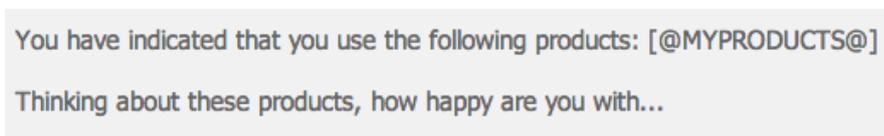


We will change the question text so that it refers to the products the respondent purchased:



Note how the code is entered just like any other piece of question text.

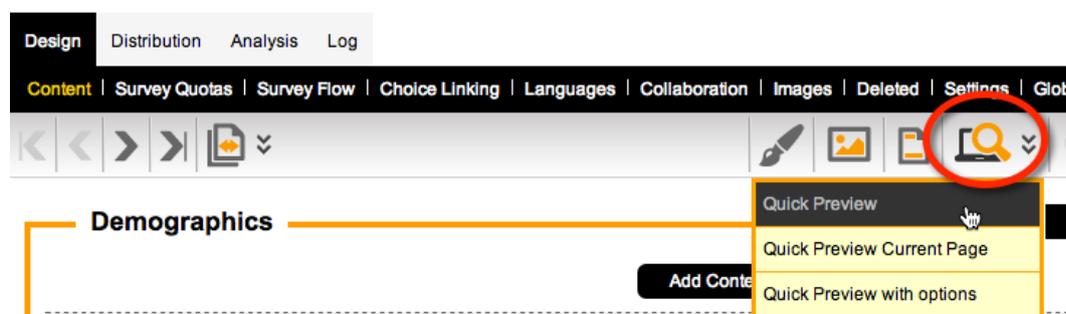
In the designer, the question will now look as follows:



The designer does not deal with responses directly, and therefore can only show the code itself. To test this data pipe, we need to preview the survey.

Step 3: Test the Data Pipe

We can test a data pipe by previewing the survey.



To test, we will say that we have used a Refrigerator and a Kettle (which is entered as an “other” item).

Which of our products have you used?

- Television
- Projector
- Washing Machine
- Refrigerator
- Hi Fi System
- Other
- I have never bought a product from you

When we go to the next page in the preview, we see the data piping in action:

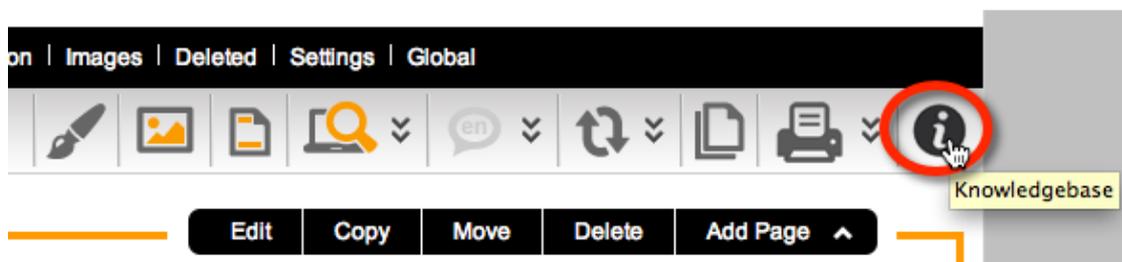
You have indicated that you use the following products: **Refrigerator, Kettle**

Thinking about these products, how happy are you with...

| | Very Happy | Slightly Happy | Undecided | Slightly Unhappy | Very Unhappy |
|--------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Our Products | <input type="radio"/> |
| Our Services | <input type="radio"/> |

Step-by-step Video

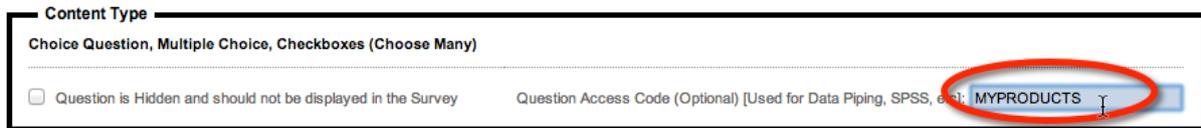
If you would like to see more examples of creating data piping, you can view it in our step-by-step video. You can access this video online by pressing the **Knowledgebase** button on the toolbar.



The video is called **Data Piping**.

Question Data Piping Reference

Data Piping is straightforward from a **Source Question** perspective - as we have seen, you simply add a code to the question.



The screenshot shows a survey question editor interface. At the top, it says "Content Type" followed by "Choice Question, Multiple Choice, Checkboxes (Choose Many)". Below this, there is a checkbox labeled "Question is Hidden and should not be displayed in the Survey". To the right of the checkbox is a text input field for "Question Access Code (Optional) [Used for Data Piping, SPSS, etc.]:" with the value "MYPRODUCTS" entered. The text input field is circled in red.

When it comes to using that data piping code, however, the way it must be used will depend upon the type of question we are referring to.

In the example above, the usage is simple:

`[@MYPRODUCTS@]` will return a list of products

An Example of more complex Data Piping – Matrix Questions

A matrix question has both rows and columns, so entering a single textual code will not suffice because it doesn't tell me exactly which data I am looking for.

The tutorial video in the previous section explains how we must refer to both the grid and the row we are looking for:



The screenshot shows a matrix question titled "Please rate your overall impression of the following features of our site". The question has four rows: "Graphics", "Content", "Layout", and "Usefulness". The columns represent rating levels: "Excellent", "Above Average", "Average", "Below Average", and "Poor". The "Above Average" column for "Graphics" and "Layout" is selected. Below the matrix, the data piping code is shown: `[@FEATURES: 1, 2 @]`. The "1" is in a yellow diamond and the "2" is in a green circle.

The tutorial video also discusses the various formatting codes available. These can also vary depending upon the type of question.

Please rate your overall impression of the following features of our site

| | Excellent | Above Average | Average | Below Average | Poor | Comments |
|------------|----------------------------------|----------------------------------|----------------------------------|-----------------------|-----------------------|----------------|
| Graphics | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Content | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |
| Layout | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | Hard to follow |
| Usefulness | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | |

Legend:

- [@FEATURES:1,2@] Above Average
- [@FEATURES:1,2|lower@] above average
- [@FEATURES:1,3@] Average
- [@FEATURES:1,3|comments@] Hard to follow

Clearly, different question types need to be dealt with in different ways. This Data Piping Reference takes you through these different question types.

Standards Used in this Reference Guide

When looking at a particular data piping code, the structure of the code is as follows (spaces are only shown for ease of readability):

[@ **Q0000**: **subcode** | **format** @] **where:**

Q0000 is the code that has been entered on the source question

#hidden# may be included to hide any data pipe. The format for a hidden code would therefore be:

[@ **Q0000**: **subcode** | **format** **#hidden#** @]

Data Grids (e.g. Matrix Questions)

Questions that take the form of “Data Grids” have a couple of elements which makes describing the data you are after a little trickier than other questions:

- Grid
- Rows
- Columns
- One or more grids
- Additional data (e.g. comments on every row, tag data on choices)

The valid content for a Data Pipe code for these types of question is as follows:

| | |
|----------------|--|
| subcode | x,y where x = GRID and y = ROW |
| format | tag:TAGNAME where TAGNAME is the code of the TAG upper lower comments |

Examples

[@FEATURES: 1,2@]

[@FEATURES: 1,2|lower@]

[@FEATURES: 1,2|comments@]

[@FEATURES: 1,2|tag:MOREINFO@]

Numeric Grids

Questions that take the form of “Numeric Grids” need to have the following items referenced:

- The Grid (which will always be 1)
- Rows
- Columns

The valid content for a Data Pipe code for these types of question is as follows:

| | |
|----------------|----------------------------------|
| Subcode | x,y,z where x = GRID and y = ROW |
|----------------|----------------------------------|

Examples

Get the value from row 3, column 2 of a numeric grid:

[@NUMGRID: 1,3,2@]

Date Time Questions

Nil - all based on format of date time field

Demographic Address

| | |
|----------------|--|
| subcode | fulladdress / address (default) addressline / address city state postalcode / zipcode / postcode / zip country |
| format | lower upper singleline |

Examples

[@ADDRESS: fulladdress@]

[@ADDRESS: city|upper@]

[@ADDRESS: fulladdress|singleline@]

[@FEATURES: 1,2|tag:MOREINFO@]

Demographic Email

| | |
|----------------|-------------|
| subcode | <i>None</i> |
| format | lower upper |

Examples

[@EMAIL|lower@]

Demographic Name

| | |
|----------------|---|
| subcode | fullname (default) firstname lastname / surname title |
| format | lower upper |

Examples

[@NAME: fullname@]

[@NAME: lastname|upper@]

Demographic Phone

| | |
|----------------|-------------|
| subcode | <i>None</i> |
| format | lower upper |

Examples

[@PHONE|lower@]

Drop Down List

| | |
|----------------|---|
| subcode | <i>None</i> |
| format | lower upper a,b,c,..,Z values for each choice |

Examples

[@MYDROPDOWN | lower@]

[@MYDROPDOWN | Alt2;Alt2;Alt3;@]

Note: The second example explains that if the first value is selected, show the text "Alt1" rather than the actual text in the list etc.

Multiple Selection List

| | |
|----------------|---|
| subcode | x where x = CHOICE |
| format | lower upper a,b,c,..,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG |

Examples

[@MYLIST | lower@]

[@MYLIST | Alt2;Alt2;Alt3;@]

[@MYLIST:1 | tag:MYDATA@]

Single Line Text

| | |
|----------------|-------------|
| subcode | <i>None</i> |
| format | lower upper |

Examples

[@SLTEXT | lower@]

Multiple Line Text

| | |
|----------------|-------------|
| subcode | <i>None</i> |
| format | lower upper |

Examples

[@MLTEXT | lower@]

Numeric

Nil - based on format

Ranking

| | |
|----------------|---|
| subcode | <i>None</i> |
| format | lower upper a,b,c,..,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG |

Examples

[@MYRANK | lower@]

[@MYRANK | Alt2;Alt2;Alt3;@]

[@MYRANK | tag:MYDATA@]

Single Selection List

| | |
|----------------|---|
| subcode | <i>None</i> |
| format | lower upper a,b,c,..,Z values for each choice tag:TAGNAME where TAGNAME is the code of the TAG |

Examples

[@MYSSL | lower@]

[@MYSSL | Alt2;Alt2;Alt3;@]

[@MYSSL | tag:MYDATA@]

Slider

Nil - shown as number

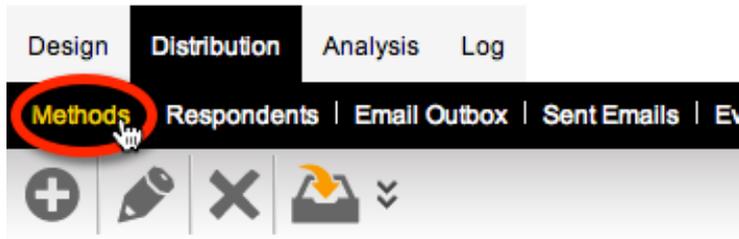
Star Rating

Nil - shown as number

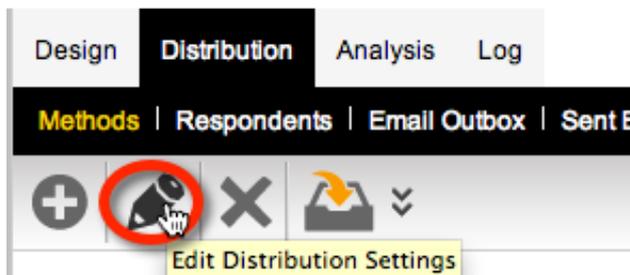
Distribution Tags – Creating and Piping

There are times when you want to get data into your survey, with different data for different distributions. Taking distribution data and getting it into a survey is very straightforward:

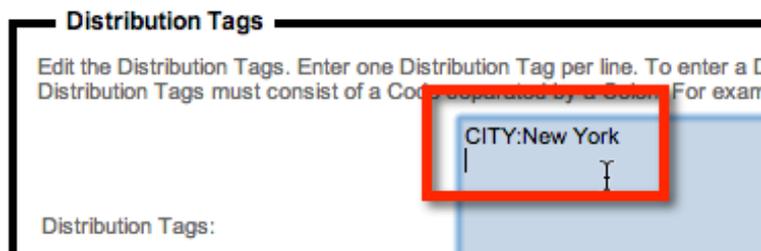
1. Go to the distribution methods for your survey by clicking on **Methods** under the **Distribution** tab.



2. Click on the **Edit Distribution** button on the toolbar.



3. Enter tags and values into the distribution.



4. Use the tags in the survey.



Piping into Post-Response Emails

Emails can be sent at the end of a response through the “Event API”. Examples of workflows that can be created through the Email sending “Event API” include:

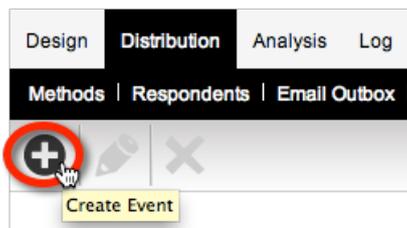
1. Sending an Email to all respondents at the conclusion of a survey indicating their response has been successfully submitted
2. Sending an Email to a company service manager if a respondent indicates a certain level of unhappiness with the service they have received

Setting up an Email can be achieved through the following steps:

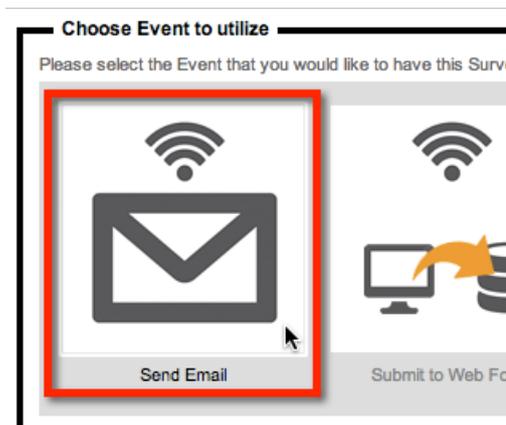
1. Choose the **Event API** from the **Distribution** tab



2. Click **Create Event** on the toolbar



3. Choose the **Send Email** event



4. Set up the details for the Event

The screenshot shows a web form titled "Send Email" with the following fields and options:

- Event Title:** Text input field containing "Send Email".
- Use Event When:** Dropdown menu with "Event is Executed on every submission of ALL Responses" selected. To its right is a checkbox labeled "Include Quota Out and Screen Out responses?".
- Event sends Response as:** Dropdown menu with "Values (where available e.g. Choice Value) otherwise Descriptive Text" selected.
- Sender Email Address:** Text input field containing "noreply@mycompany.com".
- Email "To" Address(es):** Text area with the instruction "(One address per line in format of 'emailaddress;name')".
- Email Subject:** Text input field.
- Email Message:** Large text area for the email content.

Email Content

When an Email is sent, sometimes all that is needed is some generic text. Often, however, there needs to be information in the Email that comes from the survey data or the respondent. The way to get information into the Email is to use data piping symbols. All parts of the Email can be piped – who the Email is sent to, the Email subject and the Email message content.

Possible system data piping codes are:

`_USERNAME`
`_PASSWORD`
`_TOKEN`
`_RECALLCODE`
`_SUBMITTEDDATE`
`_EDITEDDATE`
`_COMPLETETYPE`
`_LANGUAGE`
`_TOTALTIME`
`_RESPONDENTCODE`
`_RESPONDENTFIRSTNAME`
`_RESPONDENTLASTNAME`
`_RESPONDENTEMAILADDRESS`

In addition to this, standard question access codes can be used. All codes can be used with the standard data piping format of:

`[@ + ACCESS CODE + @]`.

Survey Distribution

Once you have set your survey up, the next step is collecting responses. To collect responses, you need to distribute your survey.

This chapter describes how you can distribute anonymous surveys, and surveys to known respondents, using Web Survey Creator.



When to use Anonymous Surveys

Anonymous distribution is often the best way to send a survey under the following circumstances:

- In situations where people are often more willing to answer questions honestly if their responses cannot be directly attributed to them (for example, an employee survey)
- You may not know who your respondents are until they actually answer the survey (for example, a survey link on your Web site for visitors to click on)

Creating Survey with an Anonymous Distribution

Each survey you create in Web Survey Creator can be sent anonymously with literally no work needed to set up the distribution. The default type of distribution that is set up when a new survey is created in Web Survey Creator is an anonymous distribution.

First: Choose a method to Create Survey:

Please choose one of the following options and enter the details required to create a new Survey.

- Create a new Survey by copying an existing Survey
- Create a new Survey by using a pre-defined Survey Template
- Create a new Survey by starting from a blank Survey

Then: Enter Title of the new Survey:

Please enter the title of the Survey.

Survey Title:

Finally: Choose Theme, Category, Language and Response Type options

Select a survey theme, category and default language. Survey categories are used to help keep your Surveys organised and easier to find later whilst the default language will be the language the survey defaults to when first entered. If required, these options can be changed at a later date. Selecting a survey response type will automatically create the appropriate survey distribution for you. Additional distributions for different response types can be added at a later date.

Survey Theme:

Survey Category:

Default Survey Language:

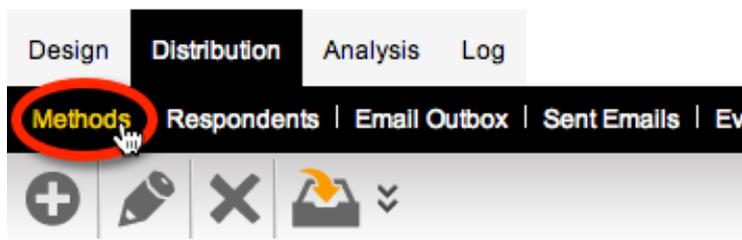
Survey Responses Type:

This type of response is perfect for surveys where you want a single generic link to be provided to anyone who wants to complete the survey. The best feature of this link is its simplicity. No tracking information exists in the link – everyone uses the same link and is completely anonymous. Respondents must complete the survey in a single sitting, as there is no way to get back to previously entered responses.

[Create New Survey](#)

Viewing a Distribution

We can view distributions for a survey under Methods on the **Distribution** tab.

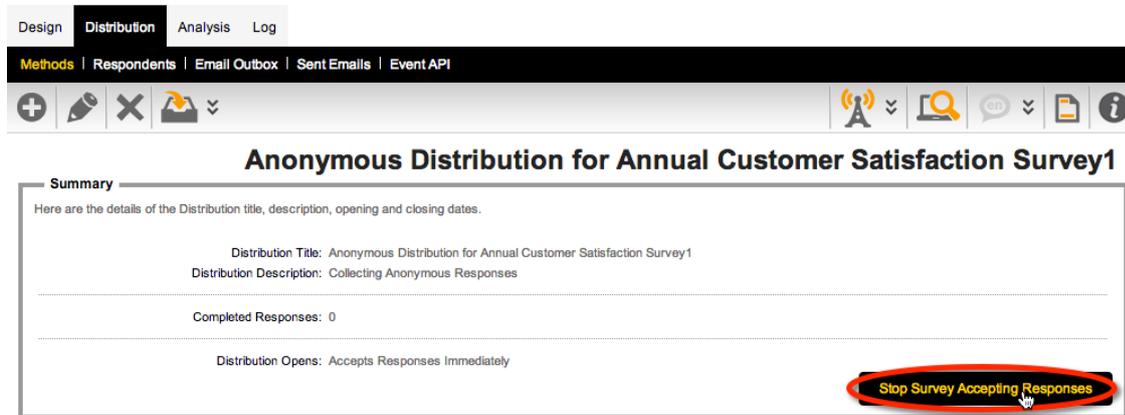


On this view, there are a number of buttons available to perform the most common actions for the distribution, without actually editing the distribution.

Starting and Stopping a Survey Accepting Responses

All versions of Web Survey Creator except the on-premise version (which has an option to not accept responses by default) will immediately allow responses to be accepted into the distribution that is created with the Survey.

You can easily tell whether a distribution is currently accepting responses – it will look as follows:



The screenshot shows the 'Distribution' tab of the Survey Creator interface. The main title is 'Anonymous Distribution for Annual Customer Satisfaction Survey1'. The 'Summary' section displays the following details:

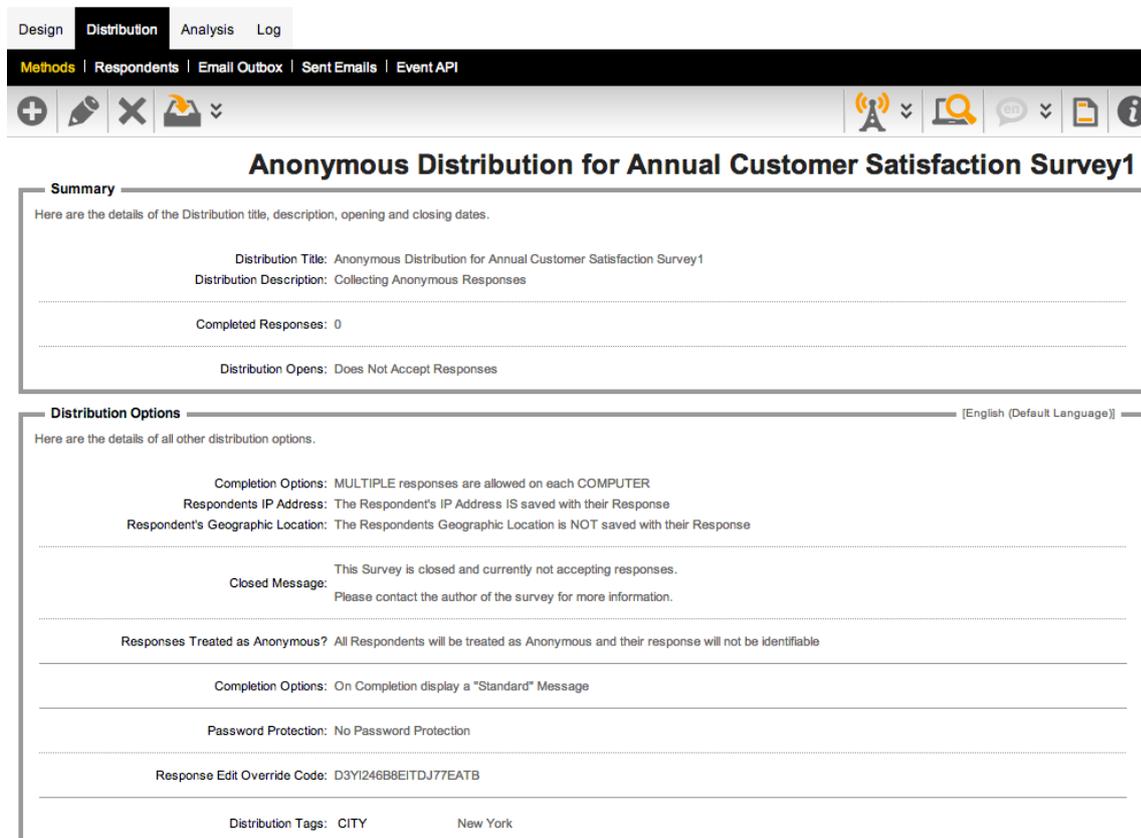
- Distribution Title: Anonymous Distribution for Annual Customer Satisfaction Survey1
- Distribution Description: Collecting Anonymous Responses
- Completed Responses: 0
- Distribution Opens: Accepts Responses Immediately

A red oval highlights a button labeled 'Stop Survey Accepting Responses' in the bottom right corner of the summary section.

To stop accepting responses, we can click the **Stop Survey Accepting Responses**.



A distribution that is not accepting responses will be missing the button above. In fact, it will be missing all buttons on the view:



The screenshot shows the 'Distribution' tab of the Survey Creator interface. The main title is 'Anonymous Distribution for Annual Customer Satisfaction Survey1'. The 'Summary' section displays the following details:

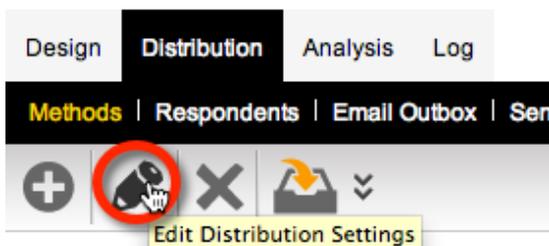
- Distribution Title: Anonymous Distribution for Annual Customer Satisfaction Survey1
- Distribution Description: Collecting Anonymous Responses
- Completed Responses: 0
- Distribution Opens: Does Not Accept Responses

Below the summary is the 'Distribution Options' section, which includes the following details:

- Completion Options: MULTIPLE responses are allowed on each COMPUTER
- Respondents IP Address: The Respondent's IP Address IS saved with their Response
- Respondent's Geographic Location: The Respondents Geographic Location is NOT saved with their Response
- Closed Message: This Survey is closed and currently not accepting responses. Please contact the author of the survey for more information.
- Responses Treated as Anonymous? All Respondents will be treated as Anonymous and their response will not be identifiable
- Completion Options: On Completion display a "Standard" Message
- Password Protection: No Password Protection
- Response Edit Override Code: D3Y1246B8EITDJ77EATB
- Distribution Tags: CITY New York

To start a distribution that was previously stopped, you need to:

1. Edit the distribution method.



2. Choose the open the distribution immediately, or at a particular time/date.

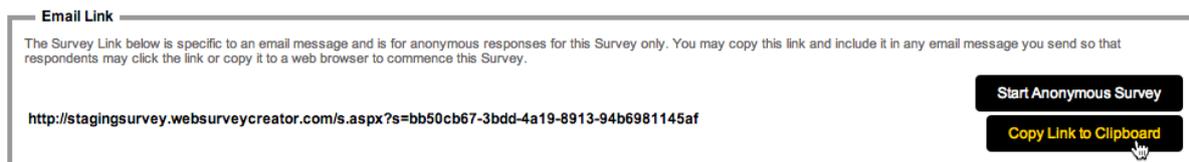


3. Save the distribution.



Opening the Survey or Distributing the Survey Link

Assuming our distribution is accepting responses, there will be a link available to open the survey.



We can click **Start Anonymous Survey** to open the survey in a new browser window

To distribute our survey to respondents, we can simply copy the survey link by pressing the **Copy Link To Clipboard** button. Once we have copied the link, we can:

1. Paste it into an Email
2. Use it on our Web site
3. Or do anything else we would normally do with a Web link to give people access to that link.

While we could also use this method to copy a link and paste it into social media sites such as Facebook and twitter, we would normally use the specific link sharing capabilities for these sites (discussed below).

Placing a Survey Link on a Web Site

A link in Email will look like a standard URL. If you want to place a link on a Web site, we may want the link to look more like a button. We can do this by copying the link under Web Page Link.

Web Page Link

The Survey Link below is HTML specifically for use on a web page and is for anonymous responses for this Survey only. You may copy this HTML and insert it on any web page so that respondents may click the link to commence this Survey.



```
<a href="http://stagingsurvey.websurveycreator.com/s.aspx?s=bb50cb67-3bdd-4a19-8913-94b6981145af">
</a>
```

Copy Link to Clipboard

Embedding a Survey into another Site

There may be times when you want the survey to appear to be part of another site. In these cases the survey is “embedded” into the page by using particular HTML code. This can be copied and used in your page by clicking **Copy Script to Clipboard**.

Web Page Embedding Links

You are able to integrate your survey into your own website by embedding the survey into your website. You may copy this HTML and insert it on any web page so that respondents may complete the survey without leaving your own web page.

```
<div id="wsc_survey" style="width:100%;">
<script type="text/javascript" src="http://stagingsurvey.websurveycreator.com/embed.ashx?s=bb50cb67-3bdd-4a19-8913-94b6981145af&w=100%&h=500px&l=true&y=true&z=">
</script>
</div>
```

Show Embedded Survey Preview

Copy Script to Clipboard

Using a QRCode on Mobile Devices

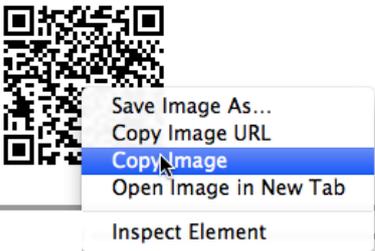
QR is short for Quick Response. A cell phone can read these images quickly. They are used to take a piece of information from a transitory media and put it in to your cell phone. The reason why they are more useful than a standard barcode is that they can store (and digitally present) much more data, including URL links, geo coordinates, and text. The other key feature of QR Codes is that instead of requiring a chunky hand-held scanner to scan them, many modern cell phones can scan them.

To use the QRCode we can copy the image from our browser.

QR Code

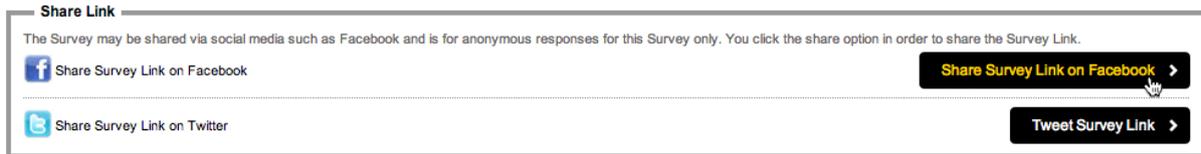
QR is short for Quick Response. These images can be read quickly by a cell phone. They are used to take a piece of information from why they are more useful than a standard barcode is that they can store (and digitally present) much more data, including url links, geo that instead of requiring a chunky hand-held scanner to scan them, many modern cell phones can scan them. The image shown below use your web browser's image copy feature (e.g. Right Click and Choose Copy Image).

<http://stagingsurvey.websurveycreator.com/s.aspx?s=47e3a809-8820-42d8-a84f-df4414d4afac>



Sharing the Survey on Facebook or Twitter

There are two buttons – **Share Survey Link on Facebook** and **Tweet Survey Link** that will post our survey link directly to these sites.



What happens when a Respondent clicks a link?

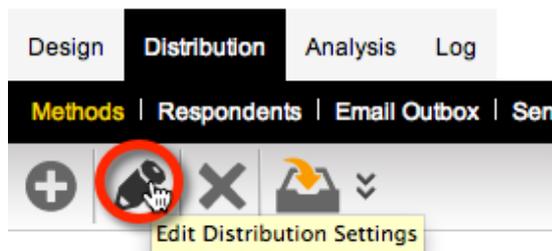
Regardless of which method of distributing links is used, the survey will always show in a similar manner. So we need to consider what happens when a respondent clicks on the link. Obviously they will be taken to the survey, but there are a number of variations on how the survey will manage their response.

These options can be changed when we edit the survey distribution.

Editing a Distribution

The anonymous distribution that is created automatically for us is set up with the most commonly used settings, but these settings can of course be changed to meet our exact requirements.

To delve into the settings for the distribution, we need to actually edit the distribution by pressing the **Edit** button on the toolbar.



The **Distribution Edit** window allows us to configure everything about the distribution, including:

1. Whether we want to use a **custom link**
2. Whether we want to **track IP Addresses**
3. When the survey should be opened and closed to **accept responses**
4. Whether to include an **Introductory Page**
5. Whether **cookies** can be used to manage access to the survey
6. Whether individual **computers should be restricted** to a single response
7. Whether respondents can **edit their responses**
8. What should be displayed when a **survey is complete**
9. Whether a **password** needs to be used to access the survey
10. What settings to use for the survey if it is **embedded**
11. What **tags** to include on the distribution for use in the survey

The full distribution edit window is shown here:

Distribution Title

Please enter the title and description for this Distribution Method. The description can be used to give details about the Method for later reference.

Distribution Title:

Distribution Description:

Custom Link:

Respondent Geographic Location: Save the Respondents IP address with their Response
 Show "Powered By WebSurveyCreator" on Surveys

When will this distribution be allowed to accept responses? [English (Default Language)]

You can choose when this distribution will accept responses and when it will stop accepting response. You can choose dates and times and/or when a certain number of responses have been completed. You can also enter a message respondents will see when the survey is not accepting responses.

Does Not Accept Responses Accepts Responses Immediately Accepts Responses from a Date and Time

Should close on a specific Date and Time
 Should close when a Response Count is reached

Closed Message:

Do you want to show an "Introduction Page" at the beginning of the Survey? [English (Default Language)]

You can optionally include an Instructions Page at the beginning of your survey. This can be used to provide the respondent with details about how to complete the survey or other information such as deadlines.

Yes, I want to show an Introduction Page at beginning of the Survey

Are you happy to use COOKIES to control access to the survey?

COOKIES will allow us to control whom has started a survey and what their response was. However cookies are not shared between different browser types (e.g. between Chrome and Internet Explorer), some jurisdictions may restrict or prohibit cookie use and some respondents may have cookies disabled. You will need to determine from your respondent makeup whether you can use cookies or not. When cookies are not used multiple responses will be allowed from a single computer.

Yes, I want to allow the use COOKIES to control access to the survey

How many responses will be allowed to be entered from a single computer?

You can restrict the number of responses that will be entered from each computer - that is, from a single Web Browser as cookies are not shared between different web browser types (e.g. between Chrome and Internet Explorer)

Only one response per computer
 Multiple responses may be entered per computer

When Respondents return to the Survey what should they be allowed to do?

You can control what a Respondent will be allowed to do each time they return to the same Survey. If any of the options listed are selected the respondent will be provided with a "Come-back-Later" Code to allow them to re-enter their response.

Respondents can leave the survey and return later to complete an uncompleted response
 Respondent may return to the survey and edit an already completed response

What should happen when the Survey Completes? [English (Default Language)]

You can choose what experience the Respondent will have when they finish the Survey. If no options are selected a "Standard" message will be displayed on completion of a response.

Display a "Thank you" Message
 Redirect them to a Web Page

Do you want to password protect this distribution? [English (Default Language)]

You can control whether Respondents must enter a password to access the Survey

No Password Protection required
 One Password that all Respondents must enter

Survey Embedding Options

You can choose to embed an anonymous Survey into your own web site. If you wish to embed your Survey into your own website set the following parameters for the display of the Survey. You are able to set the Width and Height of the Frame that the Survey will reside in. You can also choose how the Survey will be displayed. Selection of the display method will be useful when a small Width Frame is selected. You can also choose if you wish the Banner to be displayed and whether Scroll Bars should be displayed for Surveys that are longer or wider than the Frame Width and Height.

Width of Frame: [350- 1200 (for Measurements in Pixels) or 20% to 100% (for Measurements in %)]

Height of Frame: [350 - 1200 (for Measurements in Pixels)]

Display Mode:

Banner Display:

Scroll Bar Display:

Distribution Tags

Edit the Distribution Tags. Enter one Distribution Tag per line. To enter a Distribution Tag which spans more than one line place an underscore at the end of a line and continue to the next line. Distribution Tags must consist of a Code separated by a Colon. For example, CITY:New York.

Distribution Tags:

Let's look at the key settings that you can change from this **Edit** window.

Setting up a Custom Link

In addition to the title and description, we also have an option to provide a custom link for the survey – this can be thought of as a more “human readable” link than the automatically generated survey link.

Custom Link: <http://stagingsurvey.websurveycreator.com/s/custsat>

Examples of an automatically generated link could look something like this.

<http://stagingsurvey.websurveycreator.com/s.aspx?s=47e3a809-8820-42d8-a84f-df4414d4afac>

The custom link, however, could look something like this.

<http://stagingsurvey.websurveycreator.com/s/custsat>

As we can see, they are much more readable.

Email Link

The Survey Link below is specific to an email message and is for anonymous responses for this Survey only. You may respondents may click the link or copy it to a web browser to commence this Survey.

<http://stagingsurvey.websurveycreator.com/s.aspx?s=47e3a809-8820-42d8-a84f-df4414d4afac>

OR

<http://stagingsurvey.websurveycreator.com/s/custsat>

Tracking IP addresses

Every survey completed by a respondent is tagged with the address of their computer on the Internet, referred to as an IP Address. While this doesn't identify a person specifically (and therefore doesn't stop them from being anonymous), it does provide some information such as the general location of the person. For example, we can usually work out which city in the world a person is from using their IP Address.

While it is not recommended, we can uncheck the **Save IP Address** check box on the distribution if we want so even less is known about a respondent.

Starting, stopping and Restarting Surveys

The next group of settings relates to whether the survey is open to accept responses. Pressing the **Stop Survey Accepting Responses** button, like we did earlier in this chapter, was just an expedient way to change the settings we see here without having to edit the distribution directly. Because we had clicked the button to stop accepting responses we can see here that responses will not be accepted.

We are now editing the distribution, so we have a lot more options to choose from, including:

- Re-opening the survey to accept responses
- Choosing when the survey closes based on either a time and date, or a number of responses
- Setting the text for the closed survey message

When will this distribution be allowed to accept responses?

You can choose when this distribution will accept responses and when it will stop accepting response. You can choose dates and times completed. You can also enter a message respondents will see when the survey is not accepting responses.

Does Not Accept Responses
 Accepts Responses Immediately
 Accepts Responses from a Date and Time

Should close on a specific Date and Time
 Should close when a Response Count is reached

Closed Message:

This Survey is closed and currently not accepting responses.
Please contact the author of the survey for more information.

Dealing with Anonymity

One of the biggest issues with having an anonymous survey is that the survey IS anonymous. This makes it hard to deal with issues such as:

- Stopping people from entering multiple responses
- Allowing people to come back into a partially complete response and complete it
- Allowing people to edit their previously completed response
- Ensuring only the people we want have access to the survey

The distribution has a number of options to manage such issues.

If we want to stop duplicate responses from a single computer, we need to leave cookies enabled on our survey, and select **Only one response per computer**. This will hinder a person's ability to enter two responses to the survey from their computer.

How many responses will be allowed to be entered from a single computer?

You can restrict the number of responses that will be entered from each computer

Only one response per computer
 Multiple responses may be entered per computer

If we want people to be able to either complete a partial response, or edit a previously entered complete response, we check the appropriate check boxes under the **Return to Survey** settings.

When Respondents return to the Survey what should they be allowed to do?

You can control what a Respondent will be allowed to do each time they return to the same Survey. If any of the options listed are selected, a Code will be generated to allow them to re-enter their response.

Respondents can leave the survey and return later to complete an uncompleted response
 Respondent may return to the survey and edit an already completed response
 Do not allow new "Come-back-Later" Codes to be requested. That is, only existing "Come-back-Later" Codes may be used.

If we want respondents to be able to return, a "Come back Later Code" will be generated for them when they first start the survey.

Here is an example of how the survey would look to a respondent when we use this code. All the descriptive text is fully configurable in the distribution.

Annual Customer Satisfaction Survey

Survey "Come-back-Later" Code

This survey allows you to commence the survey and return later to complete or edit the survey. To do this we provide you with a "Come-back-Later" Code.

If you have an existing "Come-back-Later" Code and are allowed to complete or edit your survey you can enter the "Come-back-Later" Code here and then click "Continue" to complete or edit your survey. If you have not yet started a survey or do not yet have a "Come-back-Later" Code then Click "New Come-back-Later Code" to be provided with a "Come-back-Later" Code in order to start the Survey.

Please enter the "Come-back-Later" Code you were previously provided:

- A returning respondent enters a code they previously wrote down and presses the **Continue** button to proceed into the survey and complete or edit their previous response.
- New Respondents don't have a code – they simply press the **New Come Back Later Code** button to begin the survey.

Before the survey commences, they will then be given their own **Come back later code** which can be used if they need to re-enter the survey and edit their response at a later stage.

New "Come-back-Later" Code

Shown below is a new "Come-back-Later" Code. You must take note of this code if you survey at another time. Once you have taken note of the "Come-back-Later" Code

New "Come-back-Later" Code:

Survey Completion Settings

We can choose what a Respondent will see when the survey completes. Usually this will simply be a thank you message, but we have the option to also redirect to another Web page.

What should happen when the Survey Completes?

You can choose what experience the Respondent will have when they finish the Survey. If

Display a "Thankyou" Message

Redirect them to a Web Page

Thankyou Message:

Redirect Web Page Url:

Caption for Redirection Button:

Survey Password

We can indicate whether or not we want to require a password for entry into the survey. Enforcing a password means that unauthorized people who stumble across the survey link will not be able to complete the survey, because they will not be able to start the survey without the password that we have only provided to authorized people.

Do you want to password protect this distribution?

You can control whether Respondents must enter a password to access the Survey

No Password Protection required

One Password that all Respondents must enter

Password for all Respondents: Confirmation Password:

Survey Embedding Options

If you intend to embed the survey in another page, you need to set up how the embedded survey will operate. For example if you have a small area to embed the survey, you may choose to use a mobile phone version of the survey, and limit its width to 320px wide.

Survey Embedding Options

You can choose to embed an anonymous Survey into your own web site. If you wish to embed your Survey into your own website set the following to set the Width and Height of the Frame that the Survey will reside in. You can also choose how the Survey will be displayed. Selection Frame is selected. You can also choose if you wish the Banner to be displayed and whether Scroll Bars should be displayed for Surveys that are wider or longer than the frame.

Width of Frame: [350- 1200 (for Measurements in Pixels) or 20% to 100% (for Measurements in %)]

Height of Frame: [350 - 1200 (for Measurements in Pixels)]

Display Mode:

Banner Display:

Scroll Bar Display:

Creating a Respondent Distribution

We have seen how an Anonymous Distribution is created when we create a new survey in Web Survey Creator. If, however, we don't want anonymous respondents, we need to create a new distribution, known as a **Respondent Distribution**.

We click the **Create New Distribution Method** button from the distribution methods toolbar.



The type of distribution we want to create will use a list of respondents, so we would choose **You create Respondents here and have us send out emails for you**.

Design **Distribution** Analysis Log

Methods | Respondents | Email Outbox | Sent Emails | Event API

← ⓘ

First: Choose a way that you would like Respondents to receive your Survey:

Please choose one of the following options and enter the details required to create the new Survey Distribution Method.

You send out emails yourself, place a link on a webpage or use social media such as Facebook and Twitter
 You create Respondents here and have us send out emails for you
 Setup a distribution to use with our CATI system

Next: Give the Distribution Method a Title to identify it:

Please enter the title and description for this Distribution Method. The description can be used to give details about the Method for later reference.

Distribution Title:

Distribution Description:

Create New Distribution

We click the **Create New Distribution** button to create our distribution.

To see what options we can change on the distribution, see the previous section in this chapter called “Creating Survey with an Anonymous Distribution” (the options are exactly the same as for anonymous distributions). For this section, we will assume that the default settings are sufficient for our use.

Unlike an anonymous distribution, you will notice that a link can’t just be copied and used for this type of distribution - each respondent will receive a personal link. This is made clear when viewing the distribution:

Design **Distribution** Analysis Log

Methods | Respondents | Email Outbox | Sent Emails | Event API

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Respondent Distribution for Annual Customer Satisfaction Survey

Summary

Here are the details of the Distribution title, description, opening and closing dates.

Distribution Title: Respondent Distribution for Annual Customer Satisfaction Survey
 Distribution Description: Collecting Responses from known Respondents

Completed Responses: 0

Distribution Opens: Accepts Responses Immediately

Stop Survey Accepting Responses

This Distribution allows known Respondents to complete your Survey. Each Respondent will receive a unique link, sent by email, allowing them to complete the Survey.

Distribution Options

Here are the details of all other distribution options.

Completion Options: Only a SINGLE response is allowed by EACH Respondent
 Respondents IP Address: The Respondent's IP Address IS saved with their Response
 Respondent's Geographic Location: The Respondent's Geographic Location is NOT saved with their Response

Closed Message: This Survey is closed and currently not accepting responses.
 Please contact the author of the survey for more information.

Responses Treated as Anonymous? All Respondents will be able to have their response identified

Completion Options: On Completion display a "Standard" Message

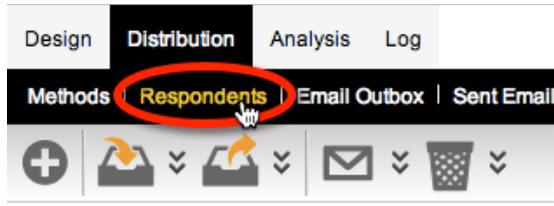
Password Protection: No Password Protection

Response Edit Override Code: 24TDG85E785TAG1CPSC3

Adding Respondents to a Distribution

Once the distribution is set up, we need to add respondents to it. This is the list of people we will be emailing with an invitation to the survey.

We set up these people under **Respondents** on the **Distribution** tab.



There are four methods to load respondents:

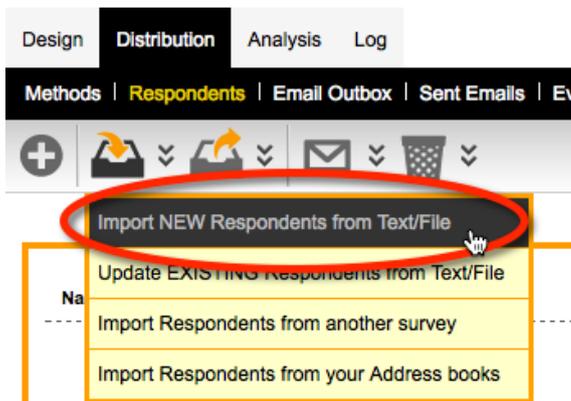
1. Import NEW Respondents from Text/File
2. Update EXISTING Respondents from Text/File
3. Import Respondents from another survey
4. Import Respondents from your Address books

We will look at each of these methods in turn.

Import Method #1: New Respondents from Text or File

The most common way to add respondents into a distribution is to import a list of new respondents into the distribution. The steps to do this are as follows:

1. Click on **Import NEW Respondents from Text/File** from the Import Respondent toolbar button



- The import window will be shown. A distribution to import into must be selected, and the respondents to import must either be pasted in as text, or uploaded from an Excel file. If a text import will be performed, and a starting format is needed, click **Insert Template** to create sample data in the text field that can be used as the basis.

- Click the Import Respondents button to perform the import.

What is SMS ID, and why would we use it?

SMSID is the “Sample Management System Identifier” and is effectively an external identifier for a respondent. It has two main uses:

- If respondents are being imported from another system or list that has a unique ID for each respondent, the SMSID can be used to store that external ID – thus providing a way to refer back to the original system or list.
- As a unique identifier that makes updating a respondent’s details in the future easy (this will be looked at in more detail in the next import method – “Update EXISTING Respondents from Text/File”)

If the import data does not have anything that could be used as SMSID, but you would like unique IDs attached to each respondent, **{AUTOSMSID}** can be put in for each respondent, and the system will generate an ID for you.

What format does the import use?

The format of the import follows uses the following rules:

- The first row of the import (the first line if importing by text, or first row if using an Excel import) lists the data that the subsequent rows will include. This includes a pre-defined list of standard fields (email, title, firstname etc.), together with response and respondent tag data.
- Each subsequent line/row in the import file contains the data for each field

If an Excel file is used for the import, it just needs to use rows and columns instead of the lines and comma delimiters used for a text import. Here is the same import data, shown as a text import, and in Excel:

```
email, title, firstname, lastname, language, phone1, timezone, smsid, mytag
maryjones@xyz.com, Ms, Mary, Jones, en, +612 3456 7890, AU-NSW, MYCODE001, tagvalue1
billwhite@xyz.com.au, Mr, Bill, White, en, +612 3456 7891, AU-QLD, {AUTOSMSID}, tagvalue1
```

| | A | B | C | D | E | F | G | H | I |
|---|----------------------|-------|-----------|----------|----------|----------------|----------|-------------|-----------|
| 1 | email | title | firstname | lastname | language | phone1 | timezone | smsid | mytag |
| 2 | maryjones@xyz.com | Ms | Mary | Jones | en | +612 3456 7890 | AU-NSW | MYCODE001 | tagvalue1 |
| 3 | billwhite@xyz.com.au | Mr | Bill | White | en | +612 3456 7891 | AU-QLD | {AUTOSMSID} | tagvalue1 |
| 4 | | | | | | | | | |

How do I pre-populate a response for the imported respondent?

The import automatically knows that you are trying to import response data when the code you use in the import file matches the access code used in a question. For example, if a survey has a gender question with the Access Code “GENDER” the import data could look as follows (gender data has been highlighted to make it easy to see):

```
email, title, firstname, lastname, language, phone1, timezone, GENDER
maryjones@xyz.com, Ms, Mary, Jones, en, +612 3456 7890, AU-NSW, 1
billwhite@xyz.com.au, Mr, Bill, White, en, +612 3456 7891, AU-QLD, 2
```

To pre-populate a question, it must be given an access ID. If the question is a choice questions, the choices must all be given unique values, because the import uses values to set the correct choices in the data

Any import data that uses a code that does not match an access code is assumed to be a respondent tag, and is added directly to the respondent.

For more information on importing question data, see the related topic later in this chapter.

Import Method #2: Update Existing Respondents from Text or File

Creating new respondents and updating existing respondents have been split so that they are distinct processes. The most important question to be asked for an update is:

How can I find the right respondent to update?

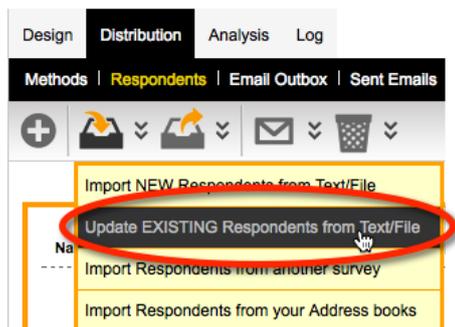
WSC allows two methods to identify a respondent:

1. Using the SMSID (if it exists)
2. Using the internal respondent identifier

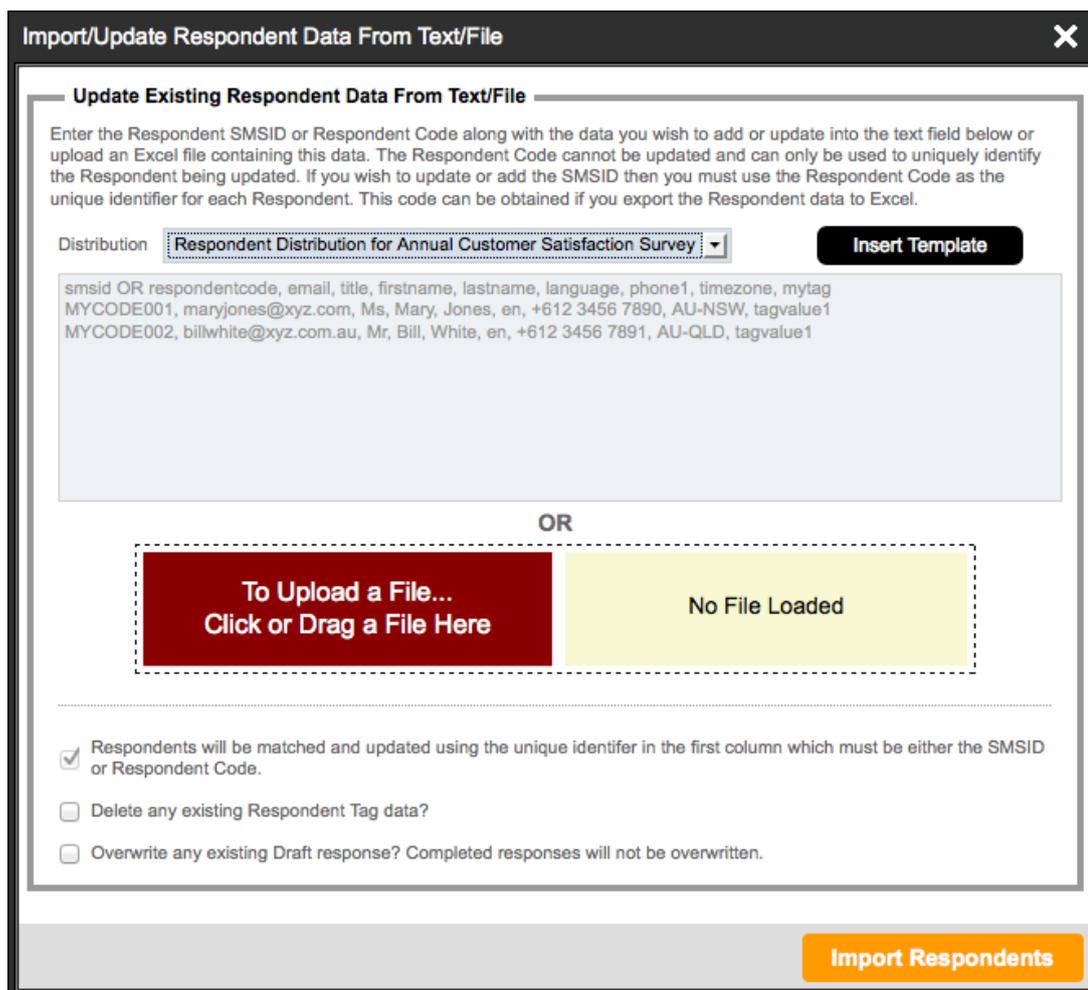
The SMSID is the best choice if it exists, because it is an ID you can set yourself, and easily see on a respondent. If you do not have an SMSID, you will need to get the internal respondent identifiers by exporting the respondents first (the export can include this identifier in the respondent data).

The steps to do a respondent update are as follows:

1. Click on **Update EXISTING Respondents from Text/File** from the Import Respondent toolbar button



2. The import window will be shown. A distribution to import into must be selected, and the respondents to import must either be pasted in as text, or uploaded from an Excel file. If a text import will be performed, and a starting format is needed, click **Insert Template** to create sample data in the text field that can be used as the basis.



3. Click the Import Respondents button to perform the import.

How does the update format differ from an import?

Here is an example of a valid update format:

```
smsid, email, title, firstname, lastname, language, phone1, timezone, mytag  
MYCODE001, maryjones@xyz.com, Ms, Mary, Jones, en, +612 3456 7890, AU-NSW, tagvalue1  
MYCODE002, billwhite@xyz.com.au, Mr, Bill, White, en, +612 3456 7891, AU-QLD, tagvalue1
```

The key difference from an import of a new respondent is that it must have an SMSID or Respondent ID as the first column of data. This will be used to find a unique respondent in the distribution to update.

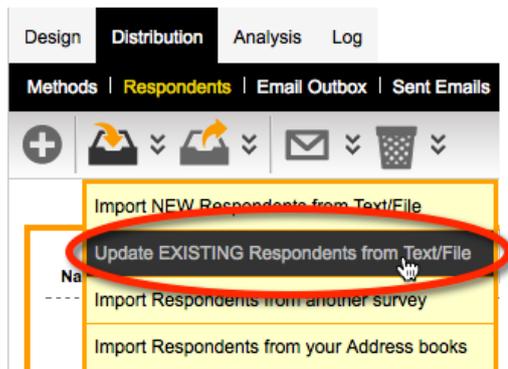
If response data is included in the update, it will only be placed into draft responses, and only if the checkbox “Overwrite any existing Draft response?” is checked. Data in completed responses is never updated.

NOTE: If draft responses are updated, the previous draft will be removed and replaced with the new data (i.e. Old data will be lost), so all data needed in the draft must be included in the update.

Import Method #3: Import Respondents from another Survey

Importing respondents from another server allows respondents to easily be used on multiple surveys. The steps to do this are as follows:

1. Click on **Import Respondents from another survey** from the Import Respondent toolbar button



2. The import window will be shown. Choose the survey, distribution and respondent status of the respondents to copy.

Import Survey Respondents From another Survey

Select the survey and distribution to copy respondents from. You can filter on Respondent status so that only those respondents who have completed are copied across.

From Survey:

From Distribution:

Respondent Status:

Import into Distribution

Select the distribution to copy the respondents into.

To Distribution:

Import Respondents From Survey

3. Click the Import Respondents From Survey button to perform the import.

Import Method #4: From an Address Book

Setting up an Address Book

Respondents can either be created directly in a respondent distribution as discussed above, or they can be created in an **Address Book** for later use in a respondent distribution. If you wish to use an address book, the address book would need to have been set up, and respondents imported into it. This section explains what needs to be done to create an Address Book and import respondents into this Address Book for later use.

A summary of the steps to create this Address Book is as follows:

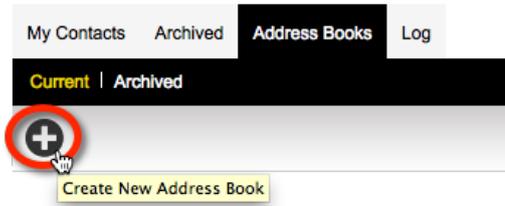
1. Click on the My Contacts menu



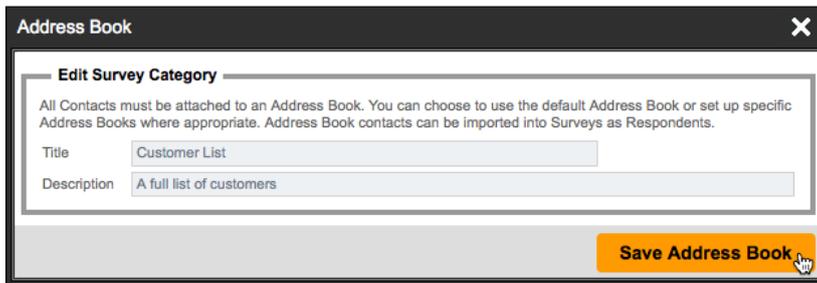
2. Click on the Address Books tab



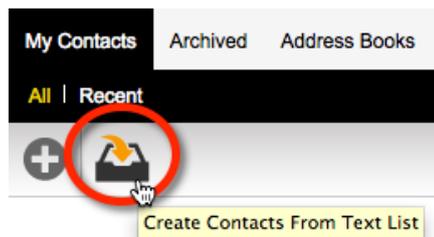
3. Click the Create New Address Book button on the toolbar



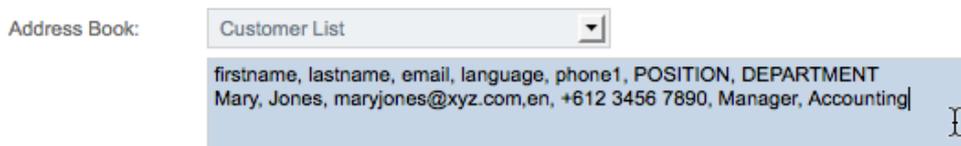
4. Name the Address Book and click the Save Address Book button



5. Return to the My Contacts tab, and click Create Contacts from Text List on the toolbar



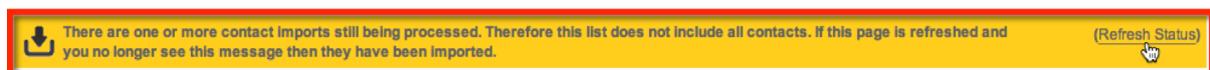
6. Choose the Address Book we have just created, and paste in the details of the customers in the format requested in the import page.



The contacts will be imported into the Address Book for use in one or more surveys

Creating a respondent from a text list is demonstrated in more detail in the video tutorial on **Managing Contacts** that can be found by clicking on the **Knowledgebase** button on the toolbar.

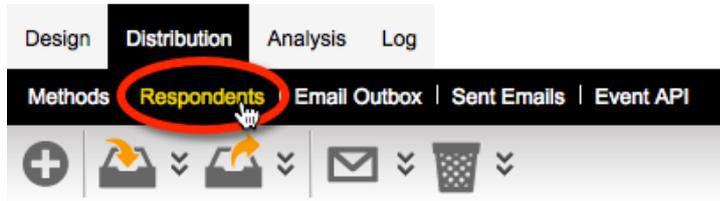
Depending upon the size of the import, it could take some time. A message is shown at the top of the screen until the import has been completed. We can press the update status link to refresh the status of this message. Once the message is gone, we know that the import is complete.



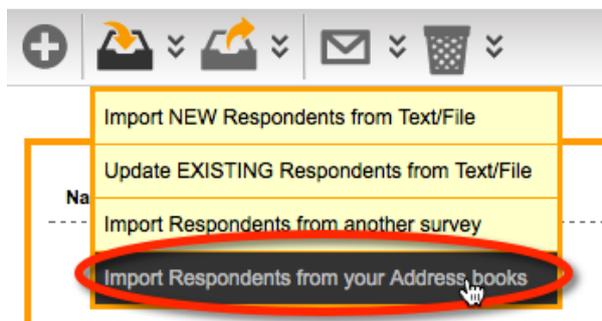
Importing from an Address Book

We've just created an Address Book with our contacts in it. We now want to use these people in the Customer address book as our respondents.

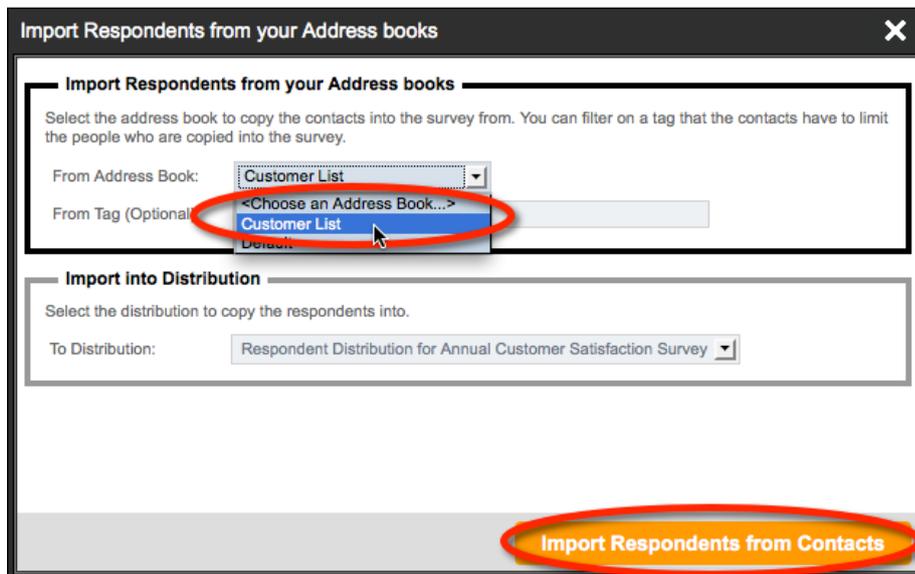
We need to go to **Respondents** under the **Distribution** tab.



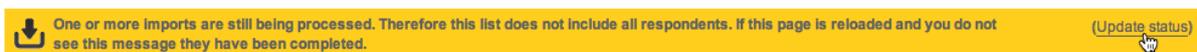
We click on the **Import** button on the toolbar, and select the third option - **Import Respondents from your Address books**.



Let's choose our Customer List address book, and then press the **Import Respondents from Contacts** button. Note that you can only



The import processing message will again be shown until the import is complete:



Importing Response Data

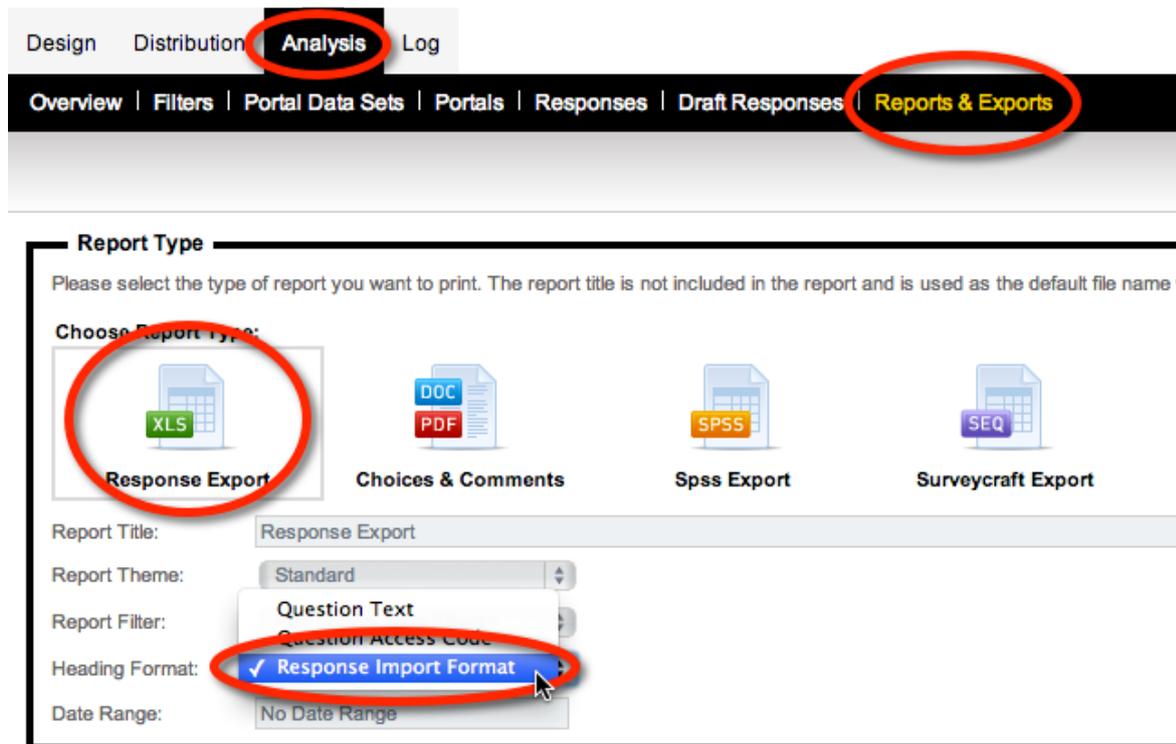
As discussed briefly in import method #1 above, it is possible to import response data along with respondent data. The example import format was as follows:

```
email, title, firstname, lastname, language, phone1, timezone, GENDER
maryjones@xyz.com, Ms, Mary, Jones, en, +612 3456 7890, AU-NSW, 1
billwhite@xyz.com.au, Mr, Bill, White, en, +612 3456 7891, AU-QLD, 2
```

In this example, there is a choice question with the code “GENDER” and the values 1 and 2 for the male and female choices. Each additional question you wish to import data for can be added on to each row of data, and all questions are supported in the import.

How can I work out the correct format for my import file?

Some question types are quite complex – matrix questions have rows and columns for example – so the format for data in the import file needs to be set up correctly to support these types. The easiest way to see the formatting for all the different question types in a particular survey is to create an export file with the formatting set up. To do this, create a **Response Export** report with the **Response Import Format** heading format.



There are two key aspects of the format to look at:

1. How the header is formatted to explain what question is being referred to
2. How the data is formatted to correctly load the data

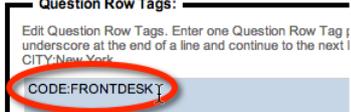
An example of a spreadsheet in a valid import format is shown below:

| | A | B | C | D | E | F | G |
|---|--------|---------------------|--------------------------|--------------|----------------------------|----------------|---------------|
| 1 | smsid | SINGLETEXT | MULTITEXT | CHOICESINGLE | CHOICESINGLE:OTHER:COMMENT | CHOICEMULTI:ES | CHOICEMULTI:2 |
| 2 | 123456 | This is single text | Multi line text 2nd line | 10 | Please Specify Text | | True |
| 3 | | | | | | | |

Row 1 is the header format, and Row 2 is the data being loaded.

Import Formats by Question Type

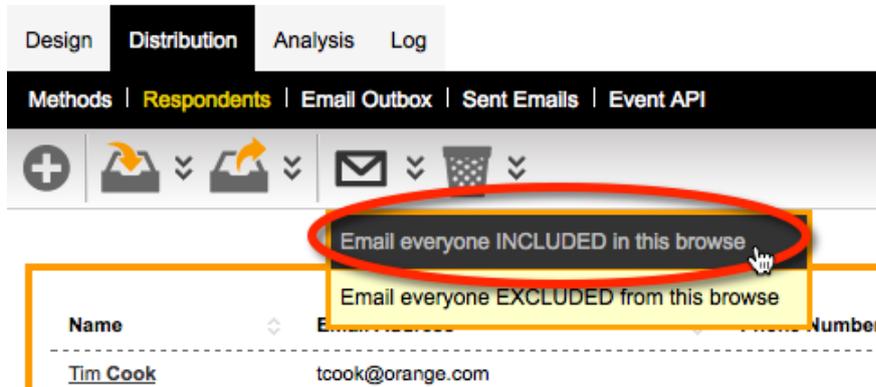
The formatting needed for each major question type is shown in the following table:

| Question Type | Details | Example |
|---|--|---|
| Text | Same format is used for single and multi-line text questions | ...,mysingletext,,My Text, ... |
| Numeric | Simple number format for import data | ...,mynumeric,,1000, ... |
| Date or Date & Time | The date and time must be entered in a structured yyyy.MM.dd.hh.mm.ss format. If time is not required, enter as 00.00.00 | ...,mydatetime,,2014.01.06.14.00.00, ... |
| Star | Simple number format for import data | ...,mystar,,1, ... |
| Slider | Simple number format for import data | ...,myslider,,50, ... |
| Choice – Single Selection | Ensure each choice has a unique value – data is the value of the choice chosen. | ...,myschoice,,3, ... |
| Choice – Multi-Selection (Choice Cloud question also uses this format) | Choices must have unique values. Import file has one column per choice, with “True” shown in the selected choices. | ..., mymchoice:1, mymchoice:2,, True, , ... |
| “Other” item in choice questions | Every choice in a choice question can have an optional “Other specify” text item. | ...,mymchoice:1,mymchoice:1:Comment,, True, My other specify text, ... |
| Choice – drop-down | Similar to a single choice question | ...,mydropdown,,3, ... |
| Hierarchical | Even though these questions use show as multiple individual dropdowns to enhance speed, one complete answer is a single choice. Ensure all choices have a unique value. | ...,myhierarchical,,3, ... |
| Single Selection Matrix | In addition to the matrix question being given a code, each row in the matrix must also be given a code so that the particular row can be referred to in the import  | ...,mymatrix:frontdesk,,3, ... |
| Multi Selection matrix | Row codes are used, and every value for each row is shown as a separate column. A “True” in a column indicates that the choice was chosen. | ...,mymatrix:pool:1, mymatrix:pool:2... ..., True, ... |
| Single Selection Dual Matrix | A dual matrix has two grids, and therefore the import file must reference whether the first or second grid is being imported into. | ...,mydualmatrix:1:frontdesk,,3, ... |
| Multi Selection Dual Matrix | A dual matrix has two grids, and therefore the import file must reference whether the first or second grid is being imported into. | ...,mydtrix:1:pool:1, mydtrix:1:pool:2... ..., True, ... |
| Comments field on Matrix Questions | Every row in a matrix question can have a comments field. | ...,mytrix:pool,mytrix:pool:Comment,,3,My comment text, ... |
| Constant Sum | Filling in the numbers for each row of a constant sum requires the row code to be used. | ...,mycs:workhrs,mycs:playhrs,,12,20, ... |
| Numeric Grid | Both the row and the column need to be referenced in a numeric grid. | ...,myng:workhrs:1,myng:workhrs:2,,10,18, ... |
| Ranking Question | Each choice to be ranked must be referred to in a separate column. The rank position (as a number) is the data that must be shown. | ...,myr:1,myr:2,myr:3,myr:4,myr:5,,1,3,,2,4, ... |
| Demographics | Demographics question use the code of the question. For multi-part questions (like name), specific secondary codes are used as follows: NAME: xx:Title, xx:First, xx>Last ADDRESS: xx:Street, xx:City, xx:State, xx:Postcode | ...,name:first,name:last,address:city,,Bob,Smith,Sydney, ... |

Sending an Invitation

OK, we now have our list of respondents. The next step is to send an invitation to these respondents to complete the survey.

We can send emails directly from the **Email** button on the toolbar.



We create a new Email by pressing the Plus button on the toolbar.

There are three things we need to deal with when creating an Email:

- Who the Email will be sent to
- Who the Email will appear to be from
- When the Email will be sent
- What the content of the Email will be

Who to send to and when to send are pretty straightforward – we want to send to all respondents the respondents in the browse, and we want to send the Email immediately.

A screenshot of the 'Email Details' form. The title is 'Email Details' and the instruction is 'Please choose the type of email, who it should be sent to, the distribution and when the email should be sent.' The form has several sections: 'Description:' with a text input field containing 'Custom'; 'To:' with a text input field containing 'maryjones@xyz.com; peter@abc.com; tcook@orange.com'; 'From:' with radio buttons for 'WebSurveyCreator' (selected) and 'WebSurveyCreator Surveys on behalf of' (with a text input field containing 'Julian Cole'); and 'Send:' with radio buttons for 'Send Immediately' (selected), 'Send In' (with a '<Days...>' dropdown), and 'Send at:' (with a date and time picker set to '2 November 2012 18:11' and a calendar icon). Below these are three checkboxes: 'Send a maximum of [] emails', 'Add the tag [] to everyone who is sent this email', and 'Send in batches of [] with [] minutes between each batch'.

The easiest way to start our Email content is to load from a standard template.



We can enter whatever we like for our Email content, but there are a couple of key things that need to be included.

```
Dear {RespondentFirstName},

You have been selected to participate in a survey. Please click on the following link to commence the survey:

{SurveyLink}

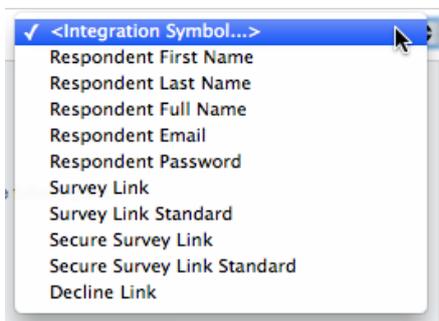
If you wish to decline this survey and do not wish to receive any further emails regarding this survey please click on the following link

{DeclineLink}

We appreciate your time, and thank you for your assistance. I
```

The Email must include a link to our survey, and it must include a **Decline Link** that allows a person to indicate they do not wish to include any more Emails. This second link is a requirement to meet anti-SPAM regulations.

Other content that may be entered includes the respondent's name. The available data that can be included can be chosen from the **Integration Symbol** drop-down.



You can use any of the following merge symbols to send emails

For Survey Data:

- {SurveyInviteEmailAddress}
- {SurveyTitle}
- {OwnerFirstName}
- {OwnerLastName}
- {OwnerFullName}
- {OwnerEmailAddress}

For Distributions Data:

- {DistributionCode}

For 360 Surveys:

{BatchCode}
{ManagerRelationship}

For Respondent Data:

{RespondentTitle}
{RespondentFirstName}
{RespondentLastName}
{RespondentFullName}
{RespondentEmail}
{RespondentSMSID}
{RespondentPassword}

Respondent Tags can be accessed via their Tag Code:

{TAGCODE}

For Response Links:

{SurveyCustomUrlLink}
{SurveyCustomUrl}
{SurveyLink}
{SurveyStandardUrlLink}
{DeclineSurveyLink}
{SurveyCustomUrl}
{SurveyStandardUrl}
{SurveyLink}
{SurveyLinkStandard}
{DeclineLink}
{Survey360UrlLink}
{SecureSurveyNetPromoterScore}")

To ensure we are happy with the Email format, we can press the **Test** button.



An Email will be sent for one of the respondents directly to our Email address, so we can check the Email link works, and the content looks good in our Email system.

Once we are happy with the Email, we can press the **Send** button.



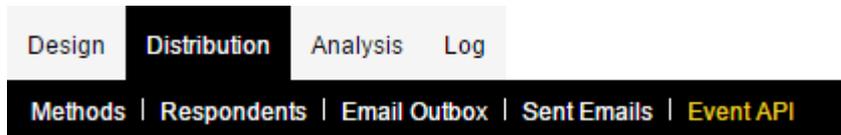
We have now distributed our survey!

Event API

What is the Event API?

The Event API is a collection of processes that can be run post survey submit. They include sending email, submit to web form, send to URL, survey to survey and JSON Pump.

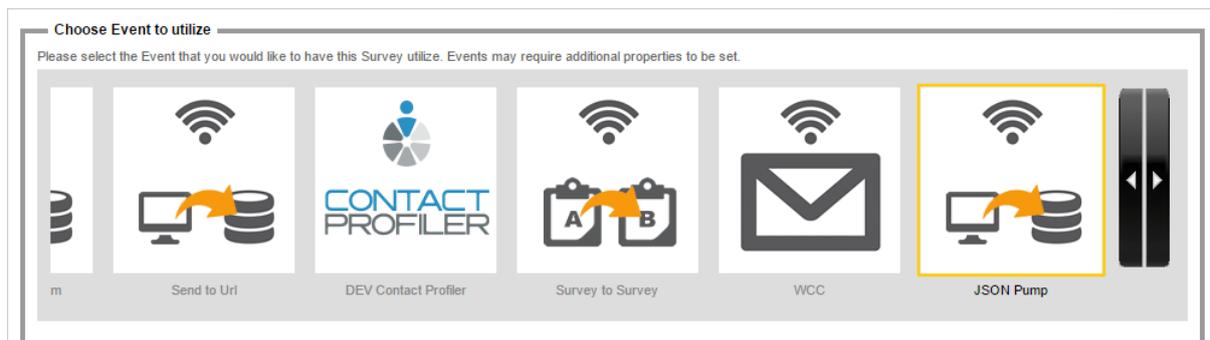
To access the Event API, click on the distribution → Event API



JSON Pump

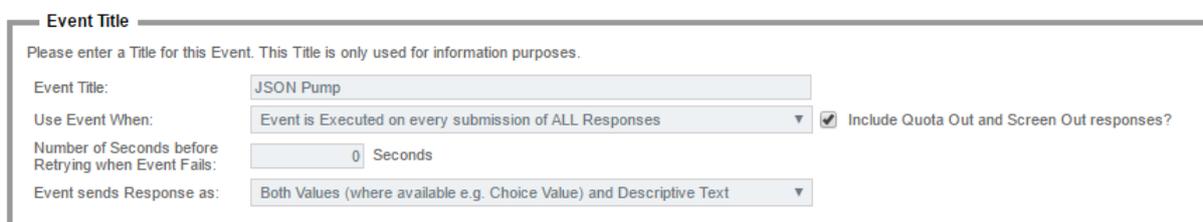
This event will create an HTTP Post Request with data from the survey sent in a serialised JSON format. The only requirement is a URL to a website that can support this type of request. It is up to the endpoint to deal with the incoming data.

To use the JSON Pump event use the scroll buttons to go right and click on the icon.



Event Title

There are a few options in this panel.

A screenshot of an 'Event Title' configuration panel. The panel has a title bar and a subtitle: 'Please enter a Title for this Event. This Title is only used for information purposes.' Below the subtitle are several input fields: 'Event Title:' with a text box containing 'JSON Pump'; 'Use Event When:' with a dropdown menu showing 'Event is Executed on every submission of ALL Responses' and a checked checkbox for 'Include Quota Out and Screen Out responses?'; 'Number of Seconds before Retrying when Event Fails:' with a text box containing '0' and the label 'Seconds'; and 'Event sends Response as:' with a dropdown menu showing 'Both Values (where available e.g. Choice Value) and Descriptive Text'.

The **event title** is just to identify within WSC.

Use Event When determines how the event is processed. The options are:

- Event is Disabled
- Event is Executed on every submission of ALL Responses

- Event is Executed on every submission of LIVE Responses only
- Event is Executed on every submission of TEST Responses only

Number of Seconds before Retrying when Event Fails allows a delay in seconds between failures. This might be useful if you do not want to overload requests to the website at the specified URL.

Event sends Response as specifies how the answers to the questions are formatted. The options are:

- Descriptive Text (e.g. Choice Text)
- Values (where available e.g. Choice Value) otherwise Descriptive Text
- Both Values (where available e.g. Choice Value) and Descriptive Text

Event Parameters

The following settings define the location of the endpoint which will be a website or web service capable of handling a POST HTTP Request and also what data to send along.

User Name (Optional) – this is an optional user field for accessing the endpoint specified in the Destination URL below.

Password (Optional) – this is an optional password for accessing the endpoint specified in the Destination URL below.

Token (Optional) – I think this is some code you can send that is something.

Destination URL – the URL for an endpoint (website/webservice) that is capable of handling a POST HTTP Request with JSON as the input stream.

Event Parameters

When a response is submitted the event will be triggered. It may include data from a completed response and information identifying the type of response and nature of the response, if appropriate. In addition, some events require additional information in order to properly connect and undertake their desired action. Please complete the following questions for this Event.

User Name (Optional):

Password (Optional):

Token (Optional):

Destination URL:

Question Access Codes:
(One Code per line, Optional)

Question Access Codes will overwrite the default data sent which includes a number of survey specific pieces of data as well as all questions that have Access Codes. The following table shows the default survey related data that is sent (if no question access codes are put into this field)

| | |
|------------------------|---|
| <u>_</u> USERNAME | Respondents username |
| <u>_</u> PASSWORD | Respondents password |
| <u>_</u> TOKEN | Token passed in via the Event API setup |
| <u>_</u> RECALLCODE | Respondents/responses recall code |
| <u>_</u> SUBMITTEDDATE | Date response was submitted |

| | |
|-----------------------------|--|
| <code>_EDITEDDATE</code> | Date response may have been edited |
| <code>_COMPLETETYPE</code> | Whether the response was a complete/screen out or quota fail |
| <code>_LANGUAGE</code> | Language the response was completed in |
| <code>_TOTALTIME</code> | Time taken in seconds |
| <code>_SURVEYLINKURL</code> | Full URL use to access the survey |

Example JSON Data

Here is an example JSON data object with 3 questions GENRE, ACTION and DRAMA.

```
[{
  "field": "_USERNAME",
  "value": ""
},
{
  "field": "_PASSWORD",
  "value": ""
},
{
  "field": "_TOKEN",
  "value": ""
},
{
  "field": "_RECALLCODE",
  "value": "3S5V4R6F3D"
},
{
  "field": "_SUBMITTEDDATE",
  "value": "2016.11.10.00.10"
},
{
  "field": "_EDITEDDATE",
  "value": "2016.11.10.00.10"
},
{
  "field": "_COMPLETETYPE",
  "value": "Complete"
},
{
  "field": "_LANGUAGE",
  "value": "en"
},
{
  "field": "_TOTALTIME",
  "value": "5.74"
},
{
  "field": "_SURVEYLINKURL",
  "value": "http%3a%2f%2flocalhost%3a57497%2fs.aspx%3fs%3dd49f3524-9656-409d-859b-
c5985087b557%26usr%3d3S5V4R6F3D"
},
{
  "field": "GENRE",
```

```
    "value": "TEXT%3aAction%3bVALUE%3a1"
  },
  {
    "field": "ACTION",
    "value":
"TEXT%3aLethal%2bWeapon%3bVALUE%3a1%0d%0aTEXT%3aTrue%2bLies%3bVALUE%3a2%0
d%0aTEXT%3aTerminator%2b2%3bVALUE%3a3%0d%0a"
  },
  {
    "field": "DRAMA",
    "value": ""
  }
}]
```

Event API Logs

How to access the Event Log

The event log lists the record for each response that triggered the Event API. This can be useful to trouble shoot issues with the event that has been setup as well as checking the content that the event created (e.g. email content).

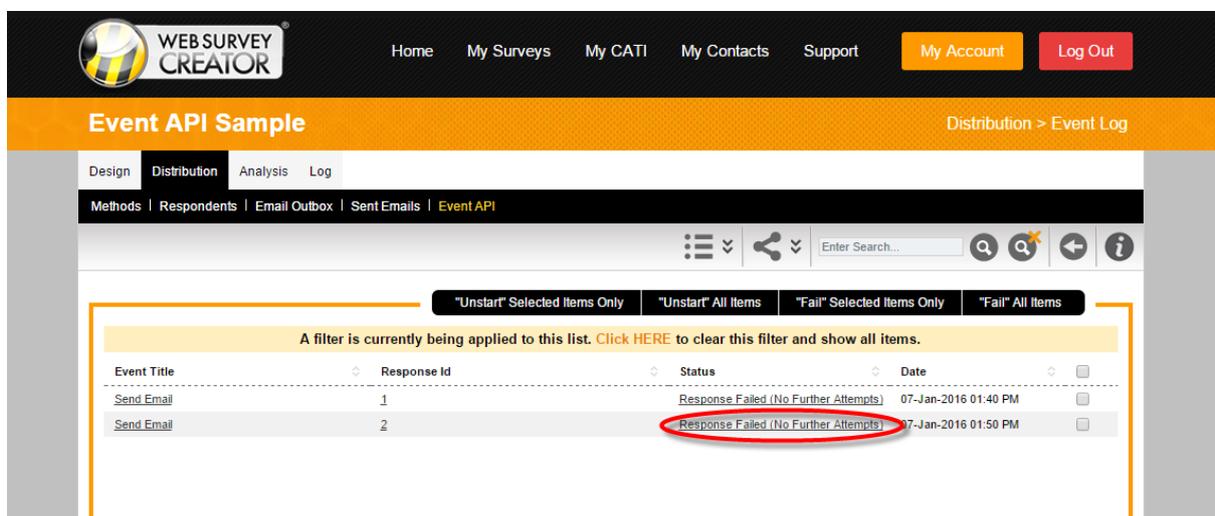
To access the Event Log, click on the three tyre icon at the top right for the Event you want to check.



Event logs

The event logs are shown in a browse, which describes the event that was triggered, the response that triggered it, the status and the last date it was processed.

To access the log entry (details) for an individual record, you can click on the highlighted field in the status column. (See Event Log Entries)



Unstart and fail items

A useful feature on this browse is the ability to fail and restart completed events. **Unstarting** will allow the system to re-process the event. **Failing** an event will stop the system from processing it any further.

Event Log Entries

There is a unique event log created for each response. This event log will contain an entry for each attempt that was processed. There will be a maximum of three retry attempts before it finally stops. In

most cases, the event will succeed on the first attempt. If for any reason the last entry is a failure, you will need to look at the message displayed to determine what the cause was.

WEB SURVEY CREATOR

Home My Surveys My CATI My Contacts Support My Account Log Out

Event API Sample Distribution > Event Log > Log Status

Design Distribution Analysis Log

Methods Respondents Email Outbox Sent Emails Event API

Event Log Status for Response: "7N4KVMT85H"

Event Log Entries

Listed here are Event Log Entries for each action that has taken place for this Response and this Event process.

Current Event Status: Response Failed (No Further Attempts)
Date/Time: 7 January 2016 13:50 PM

Log 1: Date/Time: 7 January 2016 13:49:33 PM
Status: Failure
Message: The Content Piping Code of "PHONE1" is not valid as it does not match any question in this Survey.
Server: System Email Server
Status Code: OK
Event Content: There is a problem with the data piping codes in the email event API

Log 2: Date/Time: 7 January 2016 13:49:37 PM
Status: Failure
Message: The Content Piping Code of "PHONE1" is not valid as it does not match any question in this Survey.
Server: System Email Server
Status Code: OK
Event Content: There is a problem with the data piping codes in the email event API

Log 3: Date/Time: 7 January 2016 13:49:41 PM
Status: Failure
Message: The Content Piping Code of "PHONE1" is not valid as it does not match any question in this Survey.
Server: System Email Server
Status Code: OK
Event Content: There is a problem with the data piping codes in the email event API

Each log is an attempt by the system to run the event. In this case, they all throw the same error.

Log 3: Date/Time: 7 January 2016 13:49:41 PM
Status: Failure
Message: The Content Piping Code of "PHONE1" is not valid as it does not match any question in this Survey.
Server: System Email Server
Status Code: OK
Event Content: There is a problem with the data piping codes in the email event API

The error here is that PHONE1 is not a valid data piping code. Either fix the event email content with the correct data piping code or add the data piping code to the desired question in the survey. Once a fix has been made, select the failed event logs and choose to **unstart** them. The system will then process them again.

If the message is more a technical issue – such as failed to send email because of missing settings or a bounce, you may need to contact support for assistance.

Survey Reports

Reporting is the main objective of any survey process. The types of reports you want to produce may vary from survey to survey, and will also depend on your audience.

Senior management will often just want a quick overview of results. Researchers, however, will want a detailed extract of raw responses in a format they can use in a statistical analysis program.



What is a “Report”?

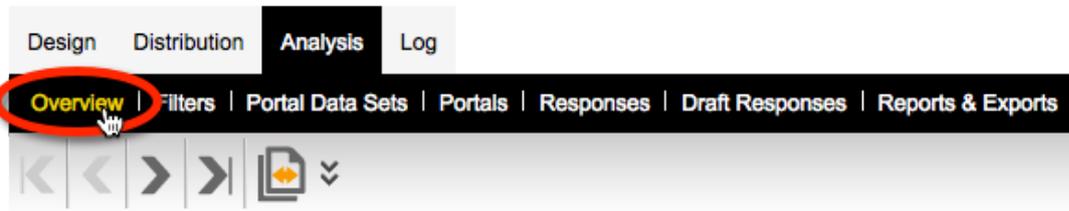
When we are talking about a “report” the first thing that jumps to mind is some sort of paper document with charts and figures on it. While this definitely is a “report”, there are all sorts of other variations we need to consider:

1. An **Online Statistics Portal** that provides real-time results through a browser
2. A native report produced in a word processor, such as Microsoft Word
3. A native export to a spreadsheet program such as Microsoft Excel
4. A native export to a statistics program such as SPSS

One of the biggest issues with Web Portals can be the time it takes to set them up. Fortunately, Web Survey Creator provides a **Statistics Overview Portal** that requires no setup at all.

Opening the Statistics Overview

The Statistics Overview Portal is accessible from *Overview* under the *Analysis* tab.



The content of the portal will depend upon the questions asked, and the version of WSC being used.

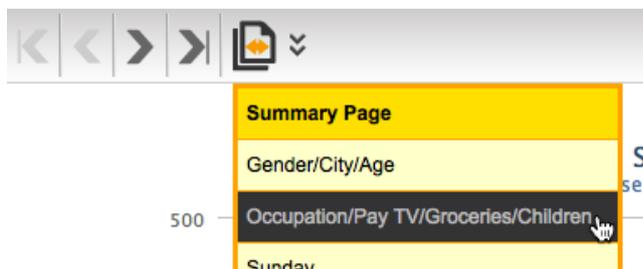
Navigation in the Overview Portal

The Overview Portal shows:

- A front page with general survey statistics
- Question pages - with each page matching a page in the survey design

We can navigate between these pages using the **Navigation** buttons on the toolbar.

The **Select Page** button on the toolbar is also a quick way to get to the page we want. We simply click on the page we want to go to, and we will be shown that page in the Overview.



Working with Overview Charts

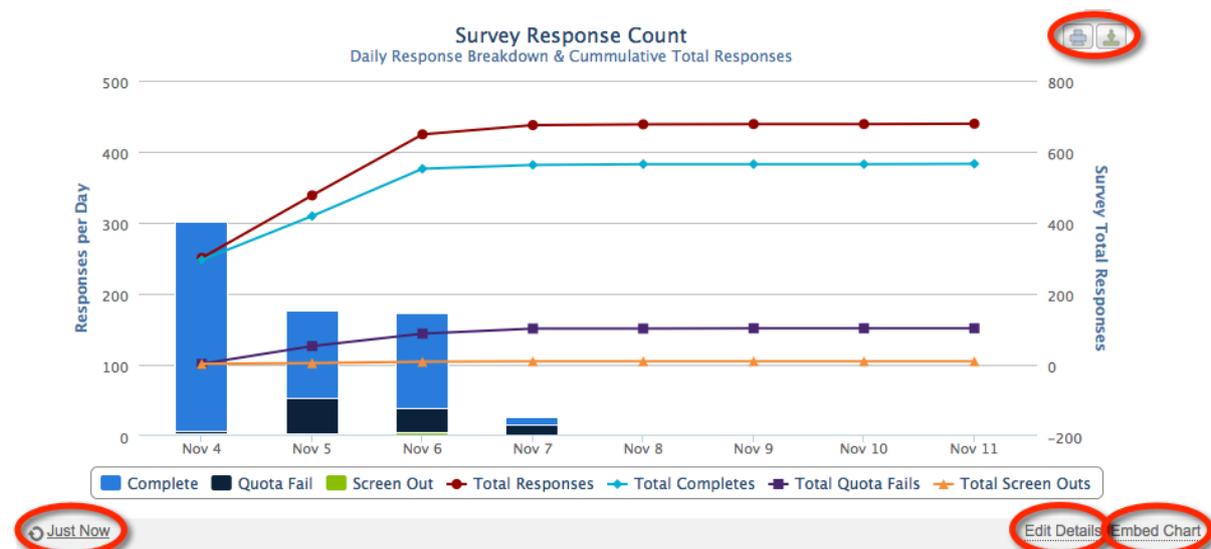
The beauty of the Overview is that it works without any effort. There may be times, however when you want to do something more with the chart than just look at it. The overview chart interface allows you to:

Refresh Chart Data - the overview is very fast, even when large amounts of data exist, because it pre-calculates the data, and updates it regularly (rather than calculating every time you go to the chart). Pressing the *Refresh button* will perform an immediate refresh.

Edit Chart Settings - headings, pre- and post- text can all be changed for a particular chart. This is great for adding explanatory text for a chart.

Embed Chart – the live chart can be embedded into another Web page by taking the embedding code and placing it in the page.

Download/Print Chart - if we want to quickly add the chart to a report, we can click the **Print** button or the **Download** button for the chart.



Creating an External Web Portal

The Statistics Overview is great for showing the statistics for a survey, but has limitations:

- Only WSC users have access to the overview - external stakeholders have no access
- All questions and statistics are shown - you can't exclude certain questions for example

What is needed is a way to view the parts of the Overview you want to view, and to allow this view to be accessible to people outside of WSC users.

What is a Web Portal?

From the perspective of WSC, a **Web Portal** can be thought of as a “view” of some or all of the content available in the Statistics Overview.

A Web Portal differs from the Statistics Overview in the following ways:

- A Web Portal is accessible to people who are not users of WSC
- The Web Portal theme and layout borrow from the theme and layout you have used for your Web Survey.

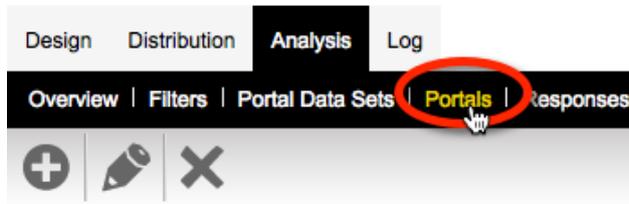
The content in the Statistics Overview is fixed, whereas Web Portal content is configurable:

- A “Home Page” for instructions and other details can appear at the front of the portal
- You choose which survey overview charts to show - some, all or none
- You choose which survey question stats to show - some, all or none
- Only one chart is shown on screen at once (isn't tied to the page structure of the survey)

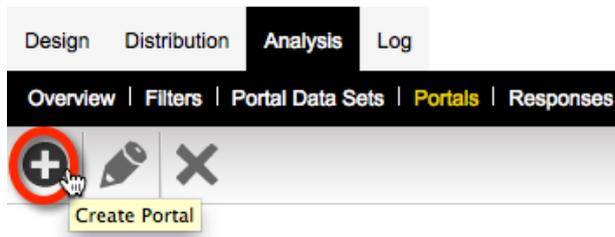
For market research users, a **table of quotas** can optionally be shown as a portal item.

Creating a Web Portal

Web Portals are created from **Portals** under the **Analysis** tab.



To add a new portal, we click the **Create Portal** button on the toolbar.



When we create our Web Portal, the settings we can change relate to what we want to include in the portal.

Create Portal

Please select the sections that you want to be available in the Survey portal.

Portal Name

- Enable Home
- Enable Question Statistic Charts
- Enable Survey Overview Charts
- Enable Survey Quotas
- Enable Survey Reports
- Enable Portal Response Data Set
- Enable Filters in Portal
- Show "Powered By WebSurveyCreator" on Portals
- Show Embedding Link

Let's look at each piece of content we can include.

Home Page

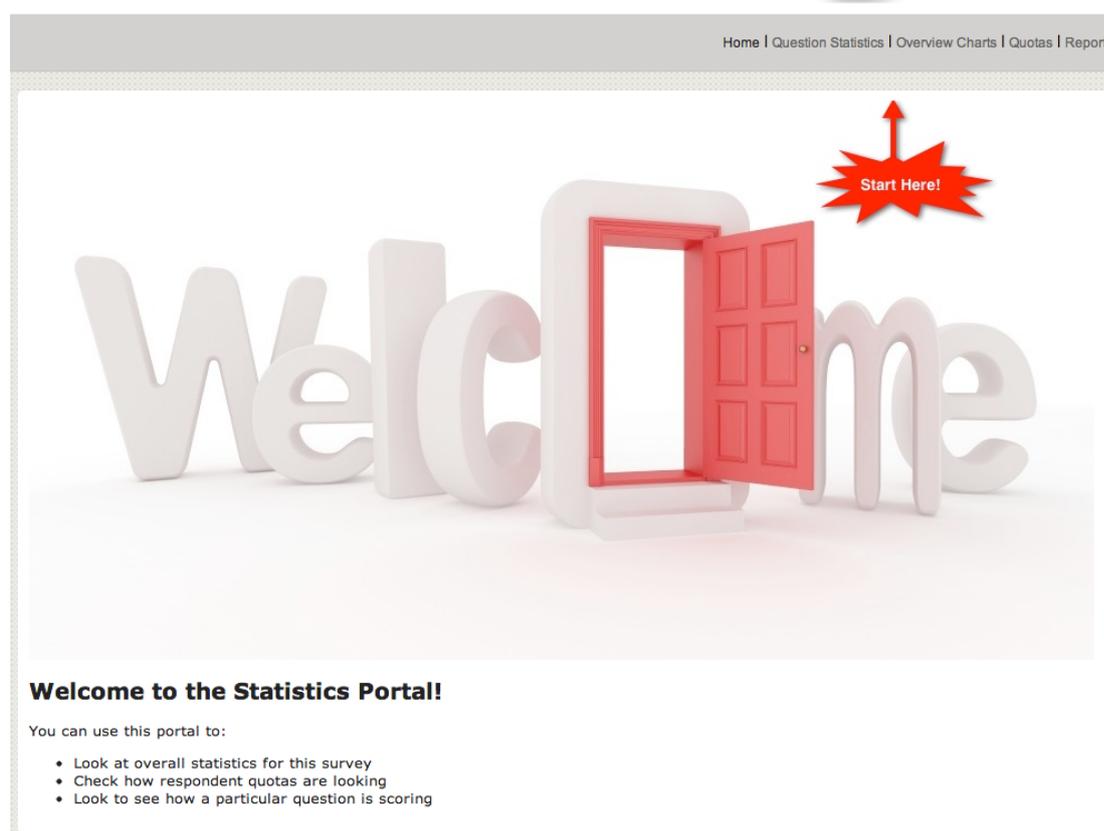
To include a **Home Page**, we must ensure it is included in the content we are showing by checking the **Enable Home** checkbox.

The content that can be entered is straight text, however with the right **Content Tags** you can do a lot of clever things. For example, the following content:

```
Home Menu 
<image:Sample1PortalHome.jpg>
<h2>Welcome to the Statistics Portal!</h2>
You can use this portal to:
<ul><li>Look at overall statistics for this survey</li><li>Check how respondent quotas are looking</li><li>Look to see how a particular question is scoring</li></ul>
```

Includes a number of things to assist with formatting – in particular it includes an image. It creates the following result:

My Portal Sample



Question Statistics

To include **Question Statistic Charts**, we must ensure it is included in the content we are showing by checking the **Enable Question Statistics Charts** checkbox.

The settings that can be changed are shown below.

Questions Statistics

You can choose to select all Questions, or you can select specific Questions you want to be available in the portal as charts.

Question Statistics Menu

Question Statistic Selection Text

<h2>Question Statistics</h2>
 To view a chart for a particular question, please choose the question from the drop-down list below.

Show All Questions
 Include only the Selected Questions

- Gender/City/Age**
 - What is your gender?
 - Which City do you live in (or the nearest Metro Capital)?
 - What is your age group?
- Occupation/Pay TV/Groceries/Children**
 - What is your occupation?
 - Does your household currently subscribe to Pay TV i.e. FOXTEL, Optus, or Austar?

Note that we can decide not to show all questions. We have therefore only selected the ones we want to show (gender, city and age).

The resulting portal page for Question Statistics looks as follows:



My Portal Sample

Home | Question Statistics | Overview Charts | Quotas | Reports

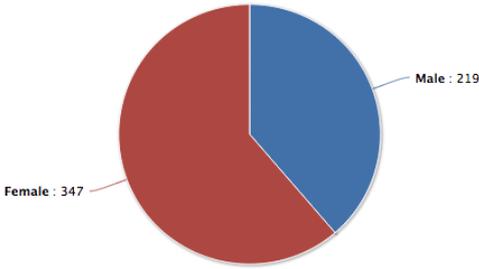
Question Statistics

To view a chart for a particular question, please choose the question from the drop-down list below.

Please Select a Question Statistic
 What is your gender?
 Which City do you live in (or the nearest Metro Capital)?
 What is your age group?

 Filtered By No Filter Selected

What is your gender?



Male : 219
Female : 347

■ Male: 219 ■ Female: 347

15 August 2012

Survey Overview Charts

To include **Survey Overview Charts**, we must ensure it is included in the content we are showing by checking the **Enable Survey Overview Charts** checkbox.

The settings that can be entered are very similar to the statistics questions. The settings we have chosen for our portal are shown here:

Overview Charts

You can choose to select all Overview Charts, or you can select specific Charts you want to be available in the portal.

| | |
|---------------------------------|---------------------------------------|
| Overview Charts Menu | Overview Charts |
| Overview chart Selection Text | Please Select a Survey Overview Chart |
| Survey Response Chart Name | Survey Responses |
| Survey Ending Pages Chart Name | Survey Ending Pages |
| Survey Device Type Chart Name | Devices |
| Time spent on survey Chart Text | Time spent |

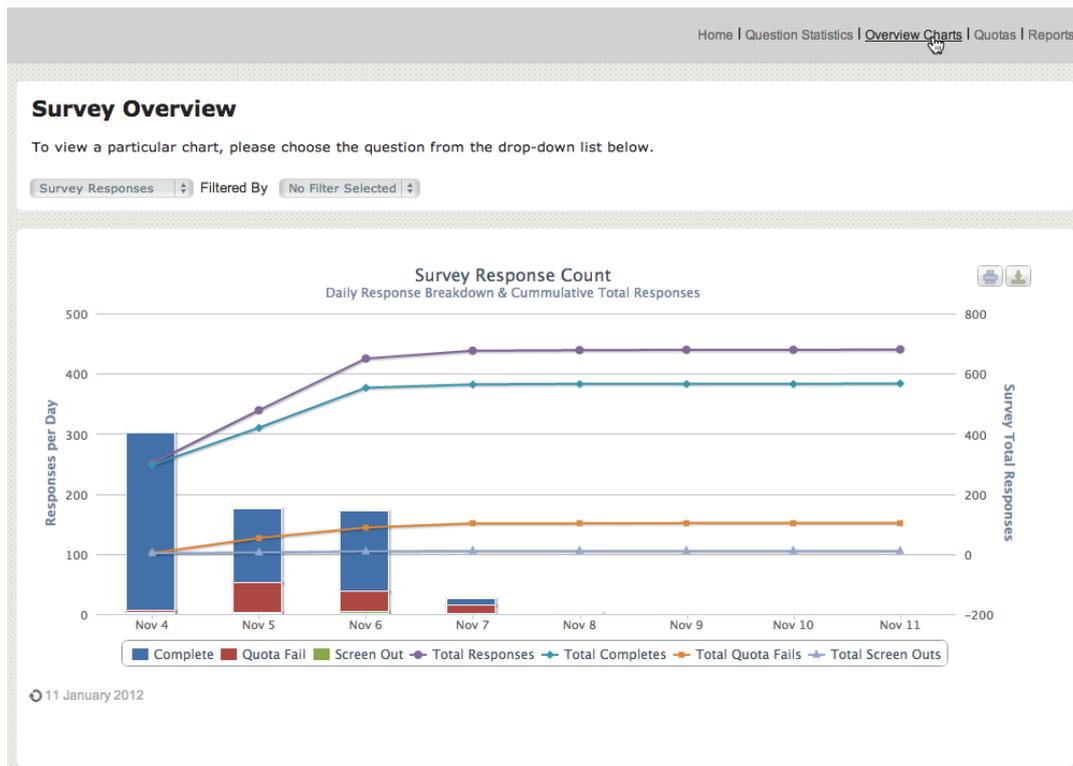
<h2>Survey Overview</h2>
To view a particular chart, please choose the question from the drop-down list below.

Show All Overview charts
 Include only the Selected Overview charts

Note that we have decided to show all overview charts.

The resulting portal page for Overview Charts looks as follows:

My Portal Sample



Survey Quotas

To include **Survey Quotas**, we must ensure it is included in the content we are showing by checking the **Enable Survey Quotas**.

Quotas can only be created in the Market Research editions of Web Survey Creator. If you are using a lower license this option will not be available.

Nothing really needs to be set up for Quotas, just some basic details:

Survey Quotas

The Quota section allows you to display up to date Survey Quotas in a tabular view with

| | |
|--------------------|--------|
| Quotas Menu | Quotas |
| Quota Totals Text: | Total |
| Quota Limit: | 1000 |

`<h2>Survey Quotas</h2>`
The current status of all survey quotas are shown in the table below.

The chart that is shown will be based upon the survey quotas that have been set up. Note that the setup of quotas is discussed in a future chapter.

My Portal Sample



Home | Question Statistics | Overview Charts | **Quotas** | Reports

Survey Quotas

The current status of all survey quotas are shown in the table below.

| Quota Title | Limit | In Quota | Remaining | Draft |
|----------------------------------|----------|----------|-----------|-------|
| City - Adelaide | 51 | 51 | - | 8 |
| City - Brisbane (inc Gold Coast) | 103 (17) | 118 | 2 | 14 |
| City - Melbourne | 152 (28) | 185 | - | 27 |
| City - Perth | 62 | 50 | 12 | 2 |
| City - Sydney | 157 | 162 | - | 20 |
| Female, 16-24 | 33 (7) | 36 | 4 | 6 |
| Female, 25-29 | 36 (19) | 53 | 2 | 7 |
| Female, 30-39 | 48 (27) | 76 | - | 8 |
| Female, 40-49 | 43 (22) | 67 | - | 8 |
| Female, 50-54 | 25 (15) | 33 | 7 | 2 |
| Female, 55-64 | 37 (13) | 48 | 2 | 11 |
| Female, 65+ | 46 | 34 | 12 | 3 |
| Male, 16-24 | 34 | 23 | 11 | - |
| Male, 25-29 | 36 | 25 | 11 | 4 |
| Male, 30-39 | 47 (13) | 60 | - | 6 |
| Male, 40-49 | 41 (20) | 46 | 15 | 6 |
| Male, 50-54 | 25 | 18 | 7 | 4 |
| Male, 55-64 | 36 | 22 | 14 | 4 |
| Male, 65+ | 38 | 25 | 13 | 2 |

Survey Reports

To include **Survey Reports**, we must ensure it is included in the content we are showing by checking the **Enable Survey Reports** checkbox.

When setting up the reports, we can choose which reports we want to show.

The screenshot shows the 'Reports' configuration screen. At the top, it says 'You can choose to select all reports, or you can select specific Questions you want to be available in the portal.' Below this is a 'Reports Menu' dropdown set to 'Reports'. A text box contains the heading '<h2>Survey Reports</h2>' and the instruction 'Choose a report to produce from the list below. Click the regenerate button to regenerate with the latest data.' There are two radio buttons: 'All Reports are available for Download on the Portal' (unselected) and 'Only the Selected Reports will be available for Download on the portal.' (selected). A tree view under 'Reports and Exports' shows four items: 'Response Export' (checked), 'Spss Export' (checked), 'Choices & Comments' (checked), and 'Surveycraft Export' (unchecked).

When we create a new report in WSC, the settings are stored so that the report can be reproduced. The reports shown for selection in the portal settings screen are the reports that were previously created. We will see how to create reports in the next section of this chapter.

The portal for reports will look as follows:

My Portal Sample



The screenshot shows the 'My Portal Sample' interface. At the top right, there is a navigation bar with links: 'Home | Question Statistics | Overview Charts | Quotas | Reports'. The main content area is titled 'Survey Reports' and contains the instruction 'Choose a report to produce from the list below. Click the regenerate button to regenerate with the latest data.' Below this are three report cards. The first card is for 'Response Export' (dated 15 October 2012) with 'XLS' and 'TXT' format options and a regenerate button. The second card is for 'Spss Export' (dated 26 July 2012) with 'SPSS' format and a regenerate button. The third card is for 'Choices & Comments' (dated 24 July 2012) with 'DOC' and 'PDF' format options and a regenerate button.

Controlling access to Web Portals

Web Portals can contain a wealth of information. This is great if you are authorized to see that information, but could be a problem if you are not supposed to see it.

Rather than protect Portals with a complex user system, Web Survey Creator takes a different approach, which could be described as “*Create the Right Portal for the Right Person*”.

So, how does this work?

Creating Multiple Portals

There is no limit to the number of portals you can create for a single survey. The idea is to create an additional portal for each type of person who needs access to it. An example would be:

| Who | What they want | What they Get |
|--------------|--|---------------------|
| Your Manager | Wants to know if we are getting enough responses... | Overview stats only |
| Researcher | Wants to get the raw responses for their stats package | Reports only |
| Your Client | Wants to know everything (like all clients) | Full Portal |

Each portal you create has a unique link generated for it that can not be guessed, and therefore is secure as long as you only send it to the people who need it. For example, a portal link could be:

<http://portal.websurveycreator.com/p.aspx?p=4528e4df-75cc-4ffe-ba31-d59cd6602f4b&lang=en&t=h>

The portal is identified with the identifier:

4528e4df-75cc-4ffe-ba31-d59cd6602f4b

Every portal is given a completely different identifier, so no one except the right people can get in.

Closing a Portal

There may be times when you don't want anyone in the portal. This could be because:

- The project has ended and the portal should no longer be accessed
- You don't want the portal accessed until a certain time/date (e.g.. give a client access on day 3, when there will be some valid data in the survey)
- You need to make modifications to the survey or the portal, and you don't want people using it

The **Portal Open Settings** allow you to:

1. Open the portal (the default state)
2. Close the portal
3. Open at a specific time/date
4. Close at a specific time/date

Design | Distribution | **Analysis** | Log

Overview | Filters | Portal Data Sets | **Portals** | Responses | Draft Responses | Reports & Exports

← ⓘ

Create Portal

Please select the sections that you want to be available in the Survey portal.

Portal Name:

- Enable Home
- Enable Question Statistic Charts
- Enable Survey Overview Charts
- Enable Survey Quotas
- Enable Survey Reports
- Enable Portal Response Data Set
- Enable Filters in Portal
- Show "Powered By WebSurveyCreator" on Portals
- Show Embedding Link

When will this portal be open?

You can Choose when this Portal will be open for viewing, and when it will cease to be available. You can choose dates and times and/or Turn the portal on and off when you see fit. You can also enter a message that will be seen if the portal is closed.

Portal Closed
 Portal Always Open
 Portal open from a Date and Time

Should close on a specific Date and Time

Closed Date and Time:

Closed Message:

Web Survey Creator Reports & Exports

Web Survey Creator produces a number of different report types:

| Report | Details |
|--------------------|---|
| Responses Export | An export of responses to an Excel spreadsheet |
| Choices & Comments | A Word document that contains the two main questions we want quick information on - choice questions and comments |
| SPSS Export | An export of the survey data as a native .sav file that can be opened in SPSS for further analysis |
| SurveyCraft Export | An export of survey data that can be imported into the SurveyCraft MR analysis tool |

All reports are created in a similar way, and with a consistent interface. The steps to creating any report are:

Go to **Reports & Exports** on the **Analysis** tab.



Click the **Create Report** button on the toolbar



Choose the report type, and enter the details for the report

Report Type

Please select the type of report you want to print. The report title is not included in the report and is used as the default file name when downloading the report.

Choose Report Type:

- Response Export (XLS)
- Choices & Comments (DOC/PDF)
- Spss Export (SPSS)
- Surveycraft Export (SEQ)

Report Title:

Report Theme:

Report Filter:

Heading Format:

Date Range:

Included Questions

To include specific questions select the 'Include selected questions' radio button. To select multiple questions hold ctrl while clicking each item.

- Include Hidden Questions
- Include Other Please Specify Results
- Single Header Row (auto filters/pivot tables)
- Include Draft Responses Worksheet
- Include Completes
- Include Screen Outs
- Include Quota Outs
- Include Quota Data

Standard Report Columns

- Submitted Date
- Come-back-Later Code
- Total Time Taken
- Distribution
- Respondent Name
- Respondent Email Address
- Respondent Declined Survey
- Respondent Tags
- User Agent Data
- AB Testing
- IP Address
- Country
- Respondent SMSID
- Respondent Phone Numbers
- Respondent Time Zone

Include ALL distributions Include selected distributions

Include ALL questions Include selected questions

Response Export Settings

Please select below whether to export the text or the values for each Selection Choice in a Choice or Matrix question. If a Selection Choice has no value then the text will be exported. Note that by default the Selection Choices in these questions do not have values.

You can also specify whether to have a separate column for each Selection Choice. If these questions allow multiple selections (ie checkboxes) and you select to export the values rather than the text then it will default to separate columns.

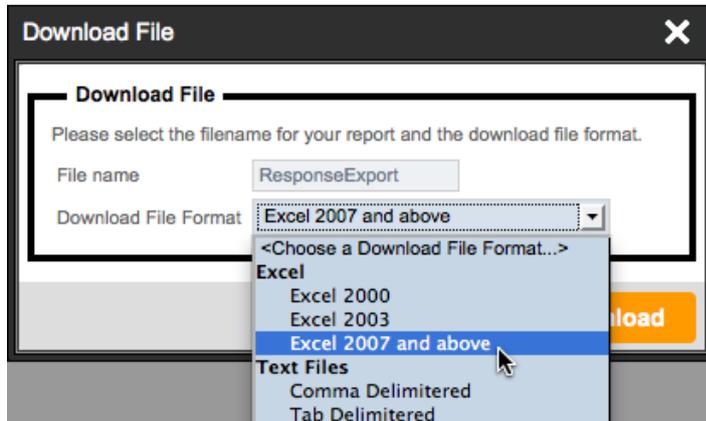
Export response text or values: Text Values

Each choice should have its own column for multiple selection questions only

Submit

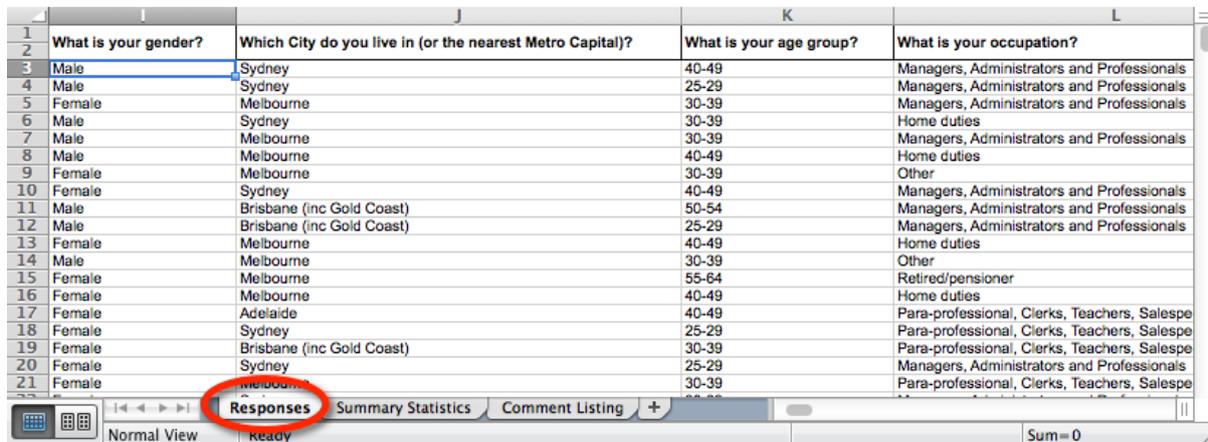
Responses Export

A responses export is the perfect way to extract the raw responses of a survey, together with summary statistics. The export is in Microsoft Excel format, making it easy for most people to open without any specialized software. This report can be extracted in a format that is most appropriate to your version of Excel (or even can be exported as a text file).



This report goes across multiple worksheets, providing:

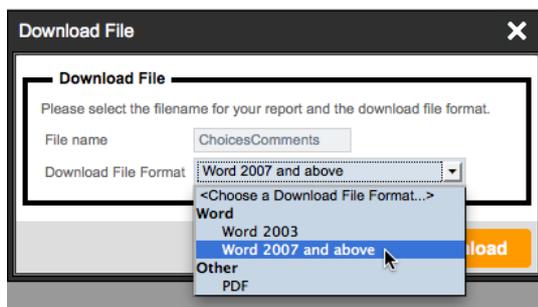
1. Raw Response Data
2. Summary Statistics
3. Comments



| | I | J | K | L |
|----|----------------------|---|-------------------------|--|
| 1 | | | | |
| 2 | What is your gender? | Which City do you live in (or the nearest Metro Capital)? | What is your age group? | What is your occupation? |
| 3 | Male | Sydney | 40-49 | Managers, Administrators and Professionals |
| 4 | Male | Sydney | 25-29 | Managers, Administrators and Professionals |
| 5 | Female | Melbourne | 30-39 | Managers, Administrators and Professionals |
| 6 | Male | Sydney | 30-39 | Home duties |
| 7 | Male | Melbourne | 30-39 | Managers, Administrators and Professionals |
| 8 | Male | Melbourne | 40-49 | Home duties |
| 9 | Female | Melbourne | 30-39 | Other |
| 10 | Female | Sydney | 40-49 | Managers, Administrators and Professionals |
| 11 | Male | Brisbane (inc Gold Coast) | 50-54 | Managers, Administrators and Professionals |
| 12 | Male | Brisbane (inc Gold Coast) | 25-29 | Managers, Administrators and Professionals |
| 13 | Female | Melbourne | 40-49 | Home duties |
| 14 | Male | Melbourne | 30-39 | Other |
| 15 | Female | Melbourne | 55-64 | Retired/pensioner |
| 16 | Female | Melbourne | 40-49 | Home duties |
| 17 | Female | Adelaide | 40-49 | Para-professional, Clerks, Teachers, Salespe |
| 18 | Female | Sydney | 25-29 | Para-professional, Clerks, Teachers, Salespe |
| 19 | Female | Brisbane (inc Gold Coast) | 30-39 | Para-professional, Clerks, Teachers, Salespe |
| 20 | Female | Sydney | 25-29 | Managers, Administrators and Professionals |
| 21 | Female | Melbourne | 30-39 | Para-professional, Clerks, Teachers, Salespe |

Choices & Comments

The Choices & Comments report can be generated as either a Word document or a PDF file.



In both cases, the report follows a simple structure that provides an easy-to-read summary of the current survey statistics and comments that have been entered.

Choices & Comments

What is your gender?

| | Count | Percentage | |
|--------|-------|------------|------------------------------------|
| Male | 219 | 38.69% | <div style="width: 38.69%;"></div> |
| Female | 347 | 61.31% | <div style="width: 61.31%;"></div> |
| | 566 | | |

Which City do you live in (or the nearest Metro Capital)?

| | Count | Percentage | |
|---------------------------|-------|------------|------------------------------------|
| Sydney | 162 | 28.62% | <div style="width: 28.62%;"></div> |
| Melbourne | 185 | 32.69% | <div style="width: 32.69%;"></div> |
| Brisbane (Inc Gold Coast) | 118 | 20.85% | <div style="width: 20.85%;"></div> |
| Adelaide | 51 | 09.01% | <div style="width: 09.01%;"></div> |
| Perth | 50 | 08.83% | <div style="width: 08.83%;"></div> |
| None of the above | 0 | 00.00% | |
| | 566 | | |

What is your age group?

| | Count | Percentage | |
|-------|-------|------------|------------------------------------|
| 16-24 | 59 | 10.42% | <div style="width: 10.42%;"></div> |
| 25-29 | 78 | 13.78% | <div style="width: 13.78%;"></div> |
| 30-39 | 136 | 24.03% | <div style="width: 24.03%;"></div> |
| 40-49 | 113 | 19.96% | <div style="width: 19.96%;"></div> |
| 50-54 | 51 | 09.01% | <div style="width: 09.01%;"></div> |
| 55-64 | 70 | 12.37% | <div style="width: 12.37%;"></div> |
| 65+ | 59 | 10.42% | <div style="width: 10.42%;"></div> |
| | 566 | | |

SPSS Export

The SPSS Export creates a file that the SPSS statistical package can load natively. All aspects of the data, including choice labels, are brought into SPSS.

The file can be saved locally for opening in SPSS.

Download File ✕

Download File

Please select the filename for your report and the download file format.

File name

Download File Format

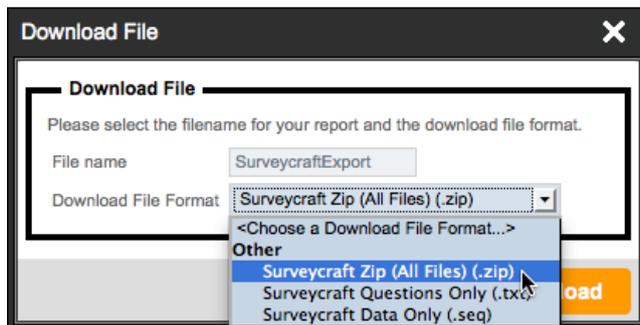
Download

SurveyCraft Export

SurveyCraft is a product used by Market Research companies. Importing data into SurveyCraft requires two files:

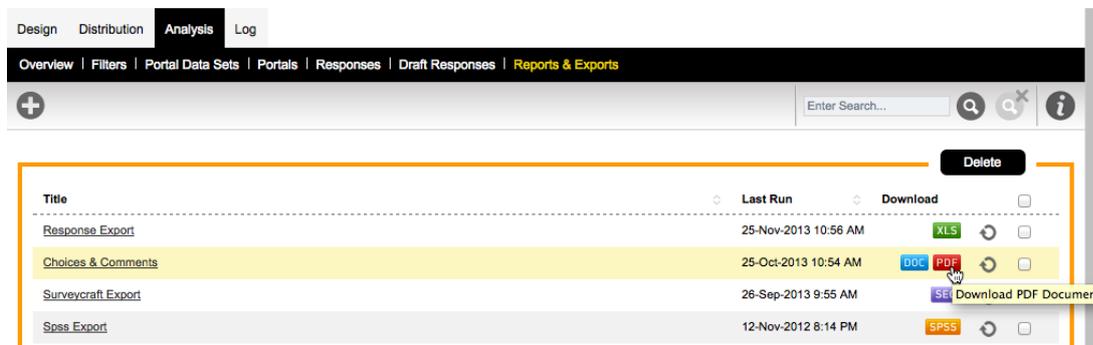
| | |
|-------------|---|
| .txt | A text file with a listing of all the questions |
| .seq | A file with all the survey data |

Web Survey Creator makes these files easy to download in a single compressed file (.zip).

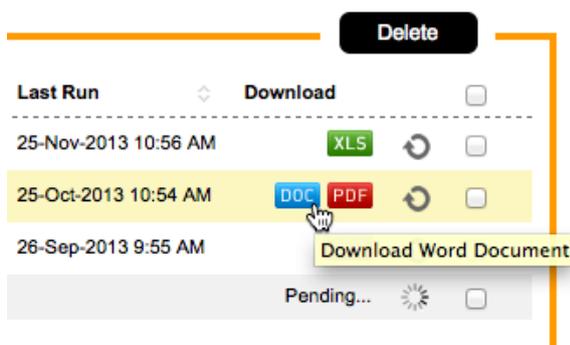


Using Previously Created Reports

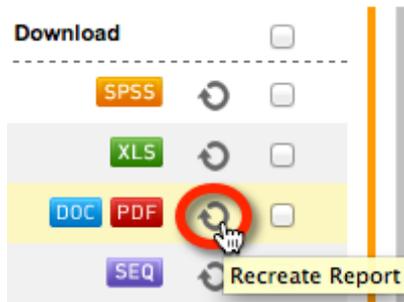
Every report you create can be easily reprinted from the **Reports Browse**.



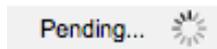
All reports are immediately available for download without regenerating the data. For example, we can grab the **Choices & Comments** report in Word format by clicking on the **DOC** icon for the report.



If we want a report with the latest data, we can click the **Refresh** icon.



The report will indicate that it is regenerating.



Once the report has been recreated, you can click on the **DOC** icon again to download this newly generated report.

Creating Market Research Surveys

Market Research Surveys are similar to any other Web Survey, except that they need more advanced capabilities to deal with things such as ensuring you have a balanced sample, and minimizing bias within the Survey Data.

Correctly managing these surveys requires a powerful Web Survey tool specifically designed to handle these advanced capabilities.



Challenges facing Market Research Professionals doing Web Surveys

Market Research professionals are faced with a rapidly changing landscape for Web Surveys where clients are expecting surveys that are more engaging, and that can be completed on a large array of devices.

Creating complex Web Surveys efficiently

As complexity has increased, Web Survey software tools have had to meet the challenges faced in efficient ways to ensure that the creation of MR surveys is still within the capabilities of non-technical users.

Web Surveys are now expected to:

- Support “flashy” interfaces that engage respondents
- Allow advanced functionality like drag and drop for responses, rather than more traditional choice questions and grids
- Provide complex validation based upon multiple rules
- Manage respondent quotas so that a representative group of respondents can be found
- Provide real-time results to stakeholders through interactive online portals

It is important for MR professionals to be able to meet all these needs without excessive increases in their time - after all, regardless of anything else clients always want things cheaper as well!

Avoiding the Software “tax”

There are a number of players in the Market Research arena - many of them quite large. They are used to dealing with the big end of town where upfront costs *and* per response costs of \$1 or more are the norm.

This software “tax” hurts your bottom line every time you try and do something. It makes good sense to try and find a system that works well, and has unlimited responses, or low per-response costs.

Need for high quality, unbiased responses

Collection of accurate, high quality data is the most critical goal for any market research survey. As researchers, we are constantly fighting against:

- Apathetic & lazy respondents e.g. no care in answering, speedsters rushing to the reward
- Mis-aligned respondent goals e.g. some just want the biggest reward for their response
- Inappropriate respondents e.g. the wrong person completing a response
- Fatigued respondents e.g. a survey is too long to maintain respondent interest

While completely eradicating these problems is a tall order, there are a number of things that can be done to minimize their occurrence.

The next section explains the features of a Market Research Survey that can be used to minimize bias.

Need for a balanced group of Respondents

It is often important to ensure that your respondents match a broad section of the community. Failure to do so could lead to results that appear to be valid, but are in fact seriously affected by the people that have been responding.

An extreme example of this would be asking the following question:

Which of the following did you play with when you were a child?

- Toy Trucks
- Barbie Dolls
- Make-up

This question has a substantial gender bias, and is likely to produce wildly different responses depending upon the gender of the respondent.

Quota management is used for balancing respondents to a survey - this is the subject of our next section.

Keeping up with the move to mobile

One of the biggest changes in recent years is the move to surveys that are responded to on mobile devices. In less than two years, allowing respondents to complete their surveys on their mobile phone or tablet has gone from a “nice to have” to a “must have”.

Often, the best place to catch a respondent is on their phone. They may not be willing to sit at their computer and answer a survey because there are things they would prefer to be doing, but if they are on a bus or train, or just sitting around, a survey on their mobile might even be a welcome distraction.

No survey package can be considered in this market unless one of its key features is high quality mobile survey delivery.

Integration with other software packages

A survey is often the middle of a complete process. For example, the process may start with an invitation sent out from a Panel Management tool, and may end with an export to a statistics package. It is important that the Web Survey tool chosen can support this sort of integration.

Dealing with Bias

In many ways, Market Research Surveys are just like any other survey. You need to ask questions, and get responses to those questions. As discussed in the previous section, there are specific problems that must be dealt with when performing market research that require added functionality beyond a basic survey tool.

We will have a look at some of the fundamental functionality needed for market research in this chapter. We will demonstrate this functionality in Web Survey Creator.



You cannot “convince” a respondent to be unbiased. What surveys have to do is balance the effect of bias so that it is effectively “cancelled out” when looking at the data as a whole.

Randomization simply refers to “shuffling” survey content so that it will appear in a different order for different respondents. This will give content an equal chance of being considered by a respondent, and spreads the effect of:

1. Questions and choices earlier in a survey being given more consideration (before a respondent’s attention drifts)
2. Less care and thought being taken by a respondent the longer a survey continues (as they become fatigued with the whole process)

Choice Randomization

A choice question with randomized choices will “mix up” the choices differently for each respondent. When randomized, the same question may appear as follows:

Which of the following brands have you heard of?

| | | | |
|--|---|--|---|
| <input type="checkbox"/>  | <input type="checkbox"/>  HONDA | <input type="checkbox"/>  | <input type="checkbox"/>  Mercedes-Benz |
|--|---|--|---|

Which of the following brands have you heard of?

| | | | |
|---|--|--|---|
| <input type="checkbox"/>  HONDA | <input type="checkbox"/>  | <input type="checkbox"/>  | <input type="checkbox"/>  Mercedes-Benz |
|---|--|--|---|

Which of the following brands have you heard of?

| | | | |
|---|---|--|---|
| <input type="checkbox"/>  Mercedes-Benz | <input type="checkbox"/>  HONDA | <input type="checkbox"/>  | <input type="checkbox"/>  |
|---|---|--|---|

Pegging Choices

There are some situations when you don’t want to randomize every single item in the list.

What fruits do you like?

| |
|---|
| <input type="checkbox"/> Apple |
| <input type="checkbox"/> Pear |
| <input type="checkbox"/> Orange |
| <input type="checkbox"/> Other <input type="text"/> |
| <input type="checkbox"/> Don't like fruit |

If we randomize this question, it could look as follows:

What fruits do you like?

Apple

Don't like fruit

Other

Orange

Pear

This doesn't really work - having the choices "other" and "don't like fruit" in the middle of the list is confusing, and off-putting (particularly since the "don't like fruit" option is exclusive and disables the other values).

What fruits do you like?

Apple

Don't like fruit

Other

Orange

Pear

Fortunately, Web Survey Creator has a simple solution to the problem - individual values can be "pegged".

Edit Selection Choice

Edit the current Choice that the respondent may choose from. You can specify whether respondents can make an "Other (Please Specify)" selector

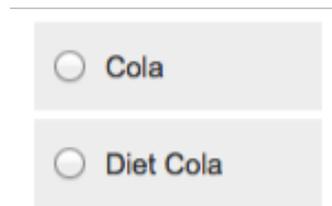
Other

- Choice is Hidden
- Choice is Pegged when Randomized
- Choice is the Default and is Selected
- Choice is Exclusive
- Choice allows an "Other (Please Specify)" Option

Pegged choices will not change their position - other choices are randomized around them.

Grouping Related Choices

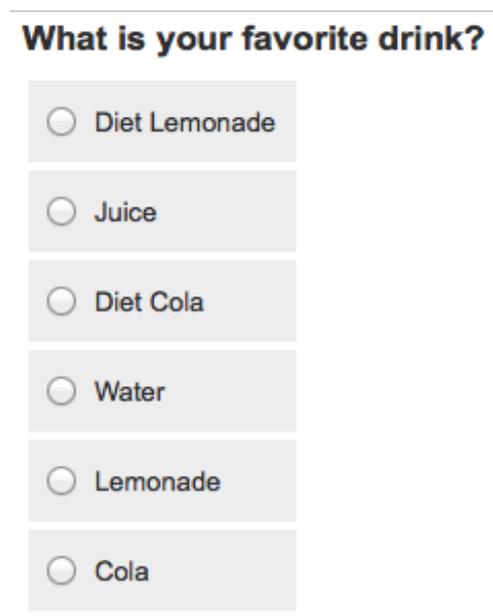
Another issue with randomization is where you want some choices to be kept together within the random choice list. These would be related choices, such as:



Cola

Diet Cola

Even when randomizing all choices, you may want to keep the Cola drinks together so that Cola lovers can easily choose between diet and non-diet variants. What we want to avoid, is a question that looks something like this when randomized:



What is your favorite drink?

Diet Lemonade

Juice

Diet Cola

Water

Lemonade

Cola

In Web Survey Creator, consecutive choices can be kept together by using the same *Block Code* for the choices.



Edit Selection Choice

Edit the current Choice that the respondent may choose from. You can also choose to set attributes for the Choice such as its visibility and whether respondents can make an "Other (Please Specify)" selection.

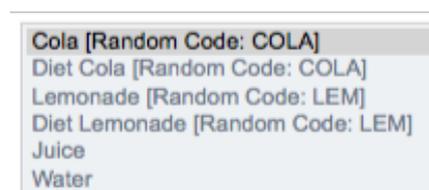
Cola

Choice is Hidden

Choice is Pegged when Randomized

Randomization Block Code: **COLA**

If we use a block code "COLA" for the Cola drinks, and "LEM" for the Lemonade, we can then randomize the choices and the related drinks will always be kept together.



Cola [Random Code: COLA]

Diet Cola [Random Code: COLA]

Lemonade [Random Code: LEM]

Diet Lemonade [Random Code: LEM]

Juice

Water

An example of how the question might look is as follows:

What is your favorite drink?

Juice

Lemonade

Diet Lemonade

Water

Cola

Diet Cola

Randomizing Consistently

It sounds strange, but “consistent randomization” can be important in a survey. For example, if you are asking multiple questions about a series of products, you may want the products to be randomized *in the same way* for every question. This is consistent randomization.

Web Survey Creator allows you to pick consistent randomization as one of the options when you turn randomization on.

Selection Choices

Edit the current Choice that the respondent may choose from. You can also choose to set attributes for the (Specify) selection.

Note: When Editing Selection Choices any changes that are made are updated immediately and cannot be undone.

Apple
Pear
Orange
Other [Other (Please Specify), Pegged]
Don't like fruit [Exclusive, Pegged]

How do you want the choices sorted:

- Randomize Order of Choices (Different Order)
- Do not apply any sorting or randomization
- Sort Choices Alphabetically
- Randomize Order of Choices (Different Order)
- Randomize Order of Choices (Consistent Order)**

Choice Validation

Min/Max Selection

Matrix Randomization

Rows and columns in a matrix can be randomized in exactly the same way as choices.

What do you think?

| | Choice 3 | Choice 2 | Choice 1 | Choice 4 |
|------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Question 2 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Question 4 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Question 1 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Question 3 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Matrix Columns

Columns in a matrix are exactly the same as choices in a choice question, and randomization is the same.

- Do not apply any sorting or randomization
- Sort Choices Alphabetically
- Randomize Order of Choices (Different Order)**
- Randomize Order of Choices (Consistent Order)

Columns can be pegged and grouped as well.

- Choice is Hidden
- Choice is Pegged when Randomized**
- Choice is the Default and is Selected
- Allow comments for this choice.

Randomization Block Code:

Matrix Rows

The rows of a matrix are usually questions or statements. You may wish to randomize their order so that people aren't "over it" every time they hit the same last questions in the matrix.

The randomization options are the same as for choices, though the way you peg a row is slightly different - you choose pegging from a drop-down list of options (which include hiding the question completely).

Edit Question Row

Edit the current question that the respondent may answer. You can also choose to hide the current question row from respondents by choosing a visibility status.

Friendliness of customer staff

Question Row will be Visible to Respondents

- Question Row will be Visible to Respondents
- Question Row will be Hidden to Respondents
- Question Row will be Visible to Respondents and is Pegged**

Page Randomization

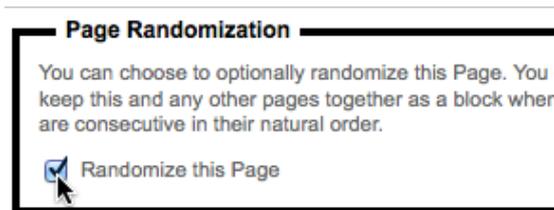
Page randomization provides the most dramatic way of randomizing survey content. You can change the order of consecutive pages in the survey randomly for each respondent using this capability.

To use page randomization, you need to:

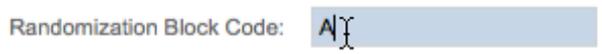
1. Edit the first page you want to randomize



2. Check the randomization check box



If you want to group pages together in the random order, enter an optional Block Code



3. Save the page
4. Repeat for each subsequent page you wish to randomize.

Tips for Page Randomization

Page randomization can have a big effect on the flow of your survey, and therefore is the most “destructive” method of randomization if you get it wrong. It is therefore important to be careful when implementing this type of randomization.

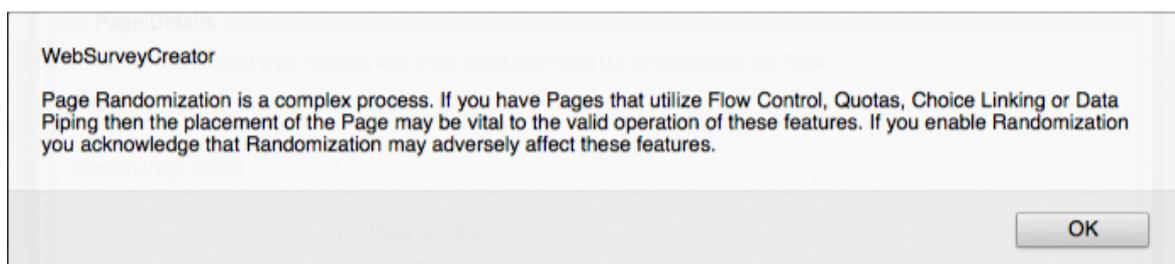
We have a couple of tips to ensure you get the most from page randomization.

Tip 1: Ensure your Random pages are consecutive

The system will randomize all pages that are consecutive and flagged as random. You can not have a non-random page in the middle of a series of random pages and expect the random pages to mix - you will end up with two groups of random pages - either side of the non-random page.

Tip 2: Don't create impossible logic!

Whenever you randomize a page, you get an explicit warning:



It is up to you to ensure you don't create a situation where the page order created through randomization. Consider the following example:

Page 1

Do you smoke?

Page 2 (Hide for people who don't smoke)

Are you looking to quit smoking?

We could randomize these pages, but it would be a very bad idea. One of the random orders of pages would ask whether you want to quit smoking, even before we know whether you smoke.

Flow control will not work in this instance, because a page that is hidden by flow control appears before the question used in the flow control is even asked...

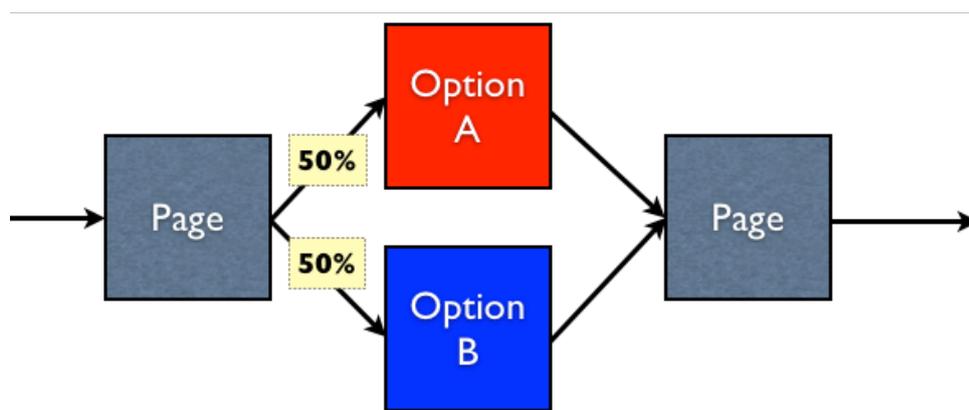
Tip 3: Test Thoroughly

Random pages are unpredictable by definition. It is important to enter test responses multiple times so you can try many variations of the page orders.

A/B Testing

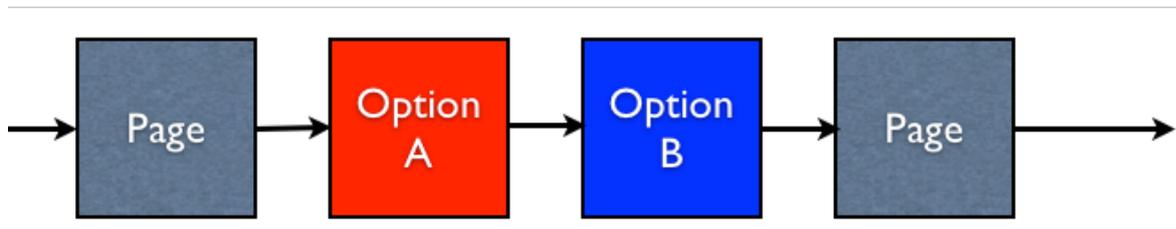
Users of A/B testing will distribute multiple samples of a test to see which single variable is most effective in increasing a response rate or other desired outcome. The test, in order to be effective, must reach an audience of a sufficient size that there is a reasonable chance of detecting a meaningful difference between the control and other tactics.

Web surveys are a great candidate to use A/B testing, since gaining access to a large audience is relatively easy. A simple example of an A/B test is shown below.



What we want is 50% of respondents to go to the page Option A, and 50% to go to the page Option B. Achieving this result is another example of randomization.

As soon as a respondent begins a response in Web Survey Creator, they are allocated a random number. This number can be used for various things - one of which is A/B testing. Setting up an A/B test is actually done through flow control. The true structure of a survey that has the A/B test above would be:



To create our A/B test, we want to hide the Option A page 50% of the time, and hide the Option B page 50% of the time.

Hiding the option A page would require the following flow:

Compare...

To build a condition you must first select an answer to a Question or information about a Respondent

Respondent's A/B Testing Random Number (Range 1 to 100)

Using Condition...

Choose how you would like to check this answer. For Example, for a "Multiple Choice, Radio Buttons (Choose Equal to Any Value)" a particular answer and may then select the choices to compare.

Condition:

- Equal To
- Not Equal To
- Greater Than
- Less Than**

Enter Text to Compare: (One Item per Line)

51

We use the **A/B testing Random Number** for the Respondent (which is always a number between 1 and 100) to do the flow. We want to hide the Option A page if the number is less than 51 (i.e. the number is between 1 and 50).

The hiding of the option B page would be the opposite test - hide the page when the A/B testing Random Number is greater than 50 (i.e. the number is between 51 and 100).

Of course this methodology wouldn't just apply to a two page test - you could have up to 100 options that are randomly chosen between, since the AB testing Random Number is equal to 1 of a possible 100 values.

Quota Management

Quota management is a key element of most market research surveys.

By controlling the quotas for a survey, you can ensure you get a balanced sample, and minimize your costs for panel respondents by ensuring you only pay for the people you actually need.



Why use Quotas?

The “More is Better” Rule

Many surveys work on the principle “the more respondents, the better” and therefore place no limits on how many people may answer the survey.

An example of such a survey would be a customer survey - you want as many customers as possible to complete the survey, and you don’t want to place any limitations on this.

The reason why this rule works for these surveys is that each respondent’s “voice” is as important as any other respondent. In our example, every respondent is a “customer”, and their views are equally important.

The “Balance is Better” Rule

Let’s consider a different example - let’s say we have a survey about what people like and dislike about a fast food brand. This may seem to be another perfect candidate to apply the “more is better” rule. This would be a mistake, and here’s why:

As a general rule, men prefer (and eat more) fast food than women

Younger men are likely to eat more fast food than older men (once their cholesterol and age catch up with them and they need to be more careful)

Middle-aged women and anybody over 60 are more likely to respond to a survey than people under 25 (who think Email is archaic, and surveys are a waste of their time)

OK, so what would this all mean if respondents are left to their own devices?

People who like fast food the least would make up a disproportionate number of survey responses - women and older men. Extrapolating this to say something about the community as a whole is meaningless. Young people who love fast food won’t be represented sufficiently to provide a balance.

The answer is to provide a balanced group of respondents, by only taking a set number of people from various sections of society. Once you have enough answers from middle aged women, you simply don’t need any more. You need to go out and find a sufficient number of young males!

A “Quota” can be based on anything you like, but commonly is based upon:

- Age
- Gender
- Location

If you take these three things into account when considering your respondents, you can make the respondent makeup mimic the makeup of society, and therefore provide a more accurate view of society’s views.

How can Quotas be managed?

Early Survey Termination

You can not control who will click through to your survey, and when they will do it. This means that an unbalanced sample of people is likely to start the survey.

The goal of a quota management system is to stop respondents you don't want at the earliest possible point.

Being terminated in a survey will be at least mildly annoying to someone who has taken the time to complete the survey. The last thing you want to do is inflame the situation by making them answer a lot of questions before they are terminated.

Best practice when creating Web Survey for Market Research is to have a survey with the following structure:

All questions to determine whether a respondent is suitable for the survey are asked in the first few pages of the survey

Terminate Pages for “Screen-Outs” (people who you are not interested in) and “Quota-Outs” (people you are interested in, but you want to limit the numbers) appear next.

Flow control is used to skip appropriate people over the terminate pages. Everyone else hits one of the terminate pages, and the survey is over.

Terminate pages are simply pages that end the survey - they don't have a **Next** button like other pages - they simply have a **Submit** button.

Setting Quota Rules

Quota management all comes down to using a set of rules to determine whether someone should be completing a survey. Each quota basically deals with 2 things:

1. Who are we looking for? (e.g. Males, 18-25)
2. How many of them do we want as respondents in our survey?

Web Survey Creator keeps track of the rules that have been created, and the number of people who have met each quota, in its Quota Management System.

| Quota Title | Limit | In Quota | Remaining |
|----------------------------------|----------|----------|-----------|
| City - Adelaide | 51 | 51 | - |
| City - Brisbane (inc Gold Coast) | 100 (20) | 118 | 2 |
| City - Melbourne | 152 (28) | 185 | - |
| City - Perth | 62 | 50 | 12 |
| City - Sydney | 157 | 162 | - |
| Female, 16-24 | 33 (7) | 36 | 4 |
| Female, 25-29 | 36 (19) | 53 | 2 |
| Female, 30-39 | 48 (27) | 76 | - |
| Female, 40-49 | 43 (22) | 67 | - |
| Female, 50-54 | 25 (15) | 33 | 7 |
| Female, 55-64 | 37 (13) | 48 | 2 |
| Female, 65+ | 46 | 34 | 12 |
| Male, 16-24 | 34 | 23 | 11 |
| Male, 25-29 | 36 | 25 | 11 |
| Male, 30-39 | 47 (13) | 60 | - |
| Male, 40-49 | 41 (20) | 46 | 15 |
| Male, 50-54 | 25 | 18 | 7 |
| Male, 55-64 | 36 | 22 | 14 |
| Male, 65+ | 38 | 25 | 13 |

Dealing with Tough Quotas

There are often particular quotas that are harder to fill than others. A particular survey may be considered worthless if all quotas are not filled, so this can be a serious issue.

If we consider our previous example, we can see where the harder quotas are:

| Quota Title | Limit | In Quota | Remaining |
|--|----------|----------|-----------|
| City - Adelaide | 51 | 51 | - |
| City - Brisbane (inc Gold Coast) | 100 (20) | 118 | 2 |
| City - Melbourne | 152 (28) | 185 | - |
| City - Perth | 62 | 50 | 12 |
| City - Sydney | 157 | 162 | - |

We can see that while there are plenty of people in most of the other location quotas, we are still looking for 12 people from Perth.

Tough quotas are normally dealt with by “opening up” a survey until we get enough of the quota. This means going over quota in other areas so that we can at least get to the minimum level needed for the hard quota.

Opening up a survey is a very rough technique that has to be manually handled.

Fortunately, Web Survey Creator provides two features that make this process a whole lot easier and more controlled - quota overflow, and priority quotas.

Quota Overflow

In the event original quota numbers have to be modified, an “overflow” figure can be entered rather than changing the original figure - making it a lot easier to see what changes we have made.

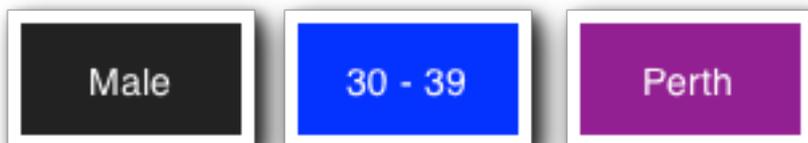
| Quota Title | Limit | In Quota | Remaining |
|--|----------|----------|-----------|
| City - Adelaide | 51 | 51 | - |
| City - Brisbane (inc Gold Coast) | 100 (20) | 118 | 2 |
| City - Melbourne | 152 (28) | 185 | - |
| City - Perth | 62 | 50 | 12 |
| City - Sydney | 157 | 162 | - |

In our example, Brisbane has an overflow of 20 respondents (on top of the original quota of 100) and Melbourne has an overflow of 28 respondents (on top of the original quota of 152).

“Priority” Quotas

Quotas in Web Survey Creator work as follows:

As soon as all questions relating to quotas are completed, the system allocates every quota that a respondent meets to them. For example, a respondent may have the following quotas attached to him:



Based on our example, we already have too many male 30-39 respondents:

| | | | |
|--------------------|---------|----|---|
| <u>Male, 30-39</u> | 47 (13) | 60 | - |
|--------------------|---------|----|---|

Therefore this respondent would fail quota - *even though we really need people from Perth* - because letting them through would mean we end up with too many 30-39 year old men.



There are times when having one quota go over target is less of a problem than not getting enough of another quota.

If we wanted to make sure we let someone from Perth through, we could set our Perth quota as a “priority” quota. This tells the system to allow anyone from Perth through as a respondent, even if their other quotas are full. As soon as Perth is full, the priority quota will no longer be in effect.

Priority quotas make it very easy to focus on your hard-to-get people. They need to be used cautiously, however, as they will lead to other quotas being over-subscribed.

Tips for Quota Management

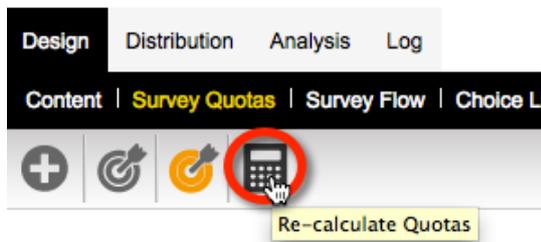
Adding quotas after a survey has commenced

The best advice that can be given about adding quotas after a survey has commenced (and responses have been received) is to avoid doing it! The main reasons to try and avoid the late inclusion of quotas are:

You will have completed responses from people who were never tested against your new quotas (since quotas are calculated as a person enters their survey response).

You risk making mistakes like inclusion of questions in quotas that appear after the quota out page (therefore making the quota out page logic invalid).

If you do add or change a quota after a survey has commenced, Web Survey Creator does help you play “catch-up” with existing responses - you can generate the correct quotas for existing responses by clicking the *Re-calculate Quotas* toolbar button under the *Survey Quotas* menu.



Testing whether someone fails the quotas in multiple places within a survey

There is nothing worse than a respondent almost getting to the end of a survey, and suddenly they are kicked out because their quota is full. Web Survey Creator avoids this situation by calculating quotas as early in the survey as possible, and from that point on there is a simple rule:

Once you're in, you're in!

What this means is if at the time the quotas were calculated there was still room for a respondent, they will be allowed to complete the survey. This may lead to a slight over-run of numbers for certain quotas if there are a number of people in that quota who finish around the same time.

A person doesn't raise the number in a quota until they have submitted their completed response, so the quota out won't be triggered until the needed number of people have completed their response.

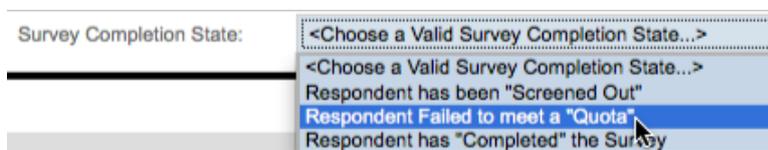
There may be times when this default behavior will cause too much of an over-run, or add unnecessary cost to a job. For example:

A survey may be really long, so a lot of people could be in the middle of the survey (beyond the quota test) when their quota is finally filled.

A significant number get past the quota test, and then leave their response in draft, to be completed later. No matter when they come back (even long after their quota is filled) they will be allowed to complete their response and add to the number in their quota.

So, how do we test for quotas more than once in a survey? Fortunately Web Survey Creator makes it simple.

If you add more than one **Quota Fail Terminate** Page to your survey, quotas will be retested prior to the second and subsequent terminate pages.



What this means is you can choose when a re-check occurs (if at all). If you don't care about annoying a respondent who has spent their time completing the answers to the survey, you could even have an additional quota fail page right near the end of the survey.

Quota Management Example

Our example survey will be for a fictitious Fast Food chain - Worldburger. They have recently introduced a new “healthier choices” menu that adds healthier options to their menu, and they want to see whether people are aware of the change, and what they think of the change.

Makeup of Respondents Required

In order to get a good cross-section of respondents, they have requested the following gender makeup for responses:

| | 16-24 | 25-29 | 30-39 | 40-49 | 50-54 | 55-64 | 65+ |
|--------|-------|-------|-------|-------|-------|-------|-----|
| Female | 33 | 36 | 48 | 43 | 25 | 37 | 46 |
| Male | 34 | 36 | 47 | 41 | 25 | 36 | 38 |

This will provide a good spread of ages, and a slight skew towards women (who are the primary focus of the “healthier choices” campaign).

An additional requirement is to have a geographical spread of respondents that roughly represents the proportional number of people in various cities who visit Worldburger stores in any given week.

| Sydney | Melbourne | Brisbane | Perth | Adelaide |
|--------|-----------|----------|-------|----------|
| 157 | 152 | 103 | 62 | 51 |

Both of these requirements add to a total of 525 people. They are not *interlocking quotas*, so it doesn't matter what the gender/age makeup is for each geographical location.

Preparing Our Survey

Gender/Age/Location Questions

Quotas are calculated based on responses entered into a survey. For our survey, we therefore need to ask about a person's gender, age and location.

For a detailed explanation about adding questions, see our [basic survey guide](#). For the purposes of this example, we will just look at the completed questions.

On our first page, we will ask for the respondent's gender:



The image shows a survey question titled "What is your Gender?". Below the title are two radio button options: "Male" and "Female". The "Male" option is selected, as indicated by a mouse cursor pointing to the radio button.

On the second page, we will ask for the respondent's age:

What is your age group?

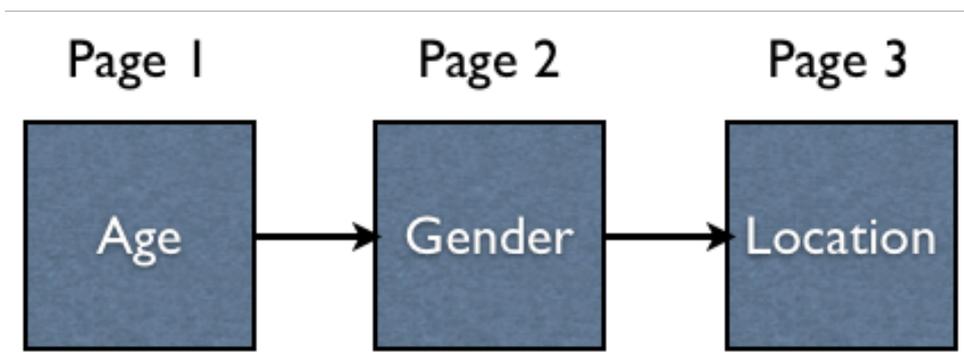
16-24
 25-29
 30-39
 40-49
 50-54
 55-64
 65+

On the third page, we will ask where the respondent lives:

Which City do you live in?

Sydney
 Adelaide
 Melbourne
 Perth
 Brisbane
 None of the above

We now have a survey with the following structure:

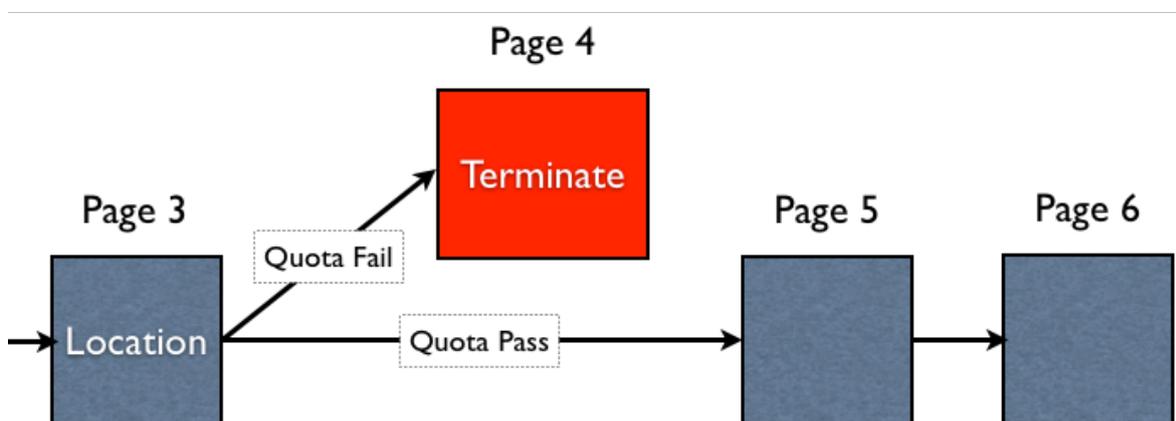


Once a respondent has answered these three questions, we will know whether or not they fit a quota.

If a respondent doesn't fit into a quota, we need to end the survey for them.

The fourth page in the survey will therefore be a **Quota Fail Terminate** Page. If a respondent does not fit into quotas, they will see this page. If they do fit into a quota, this page will be hidden and they will move onto page 5.

This logic is explained in the following diagram:



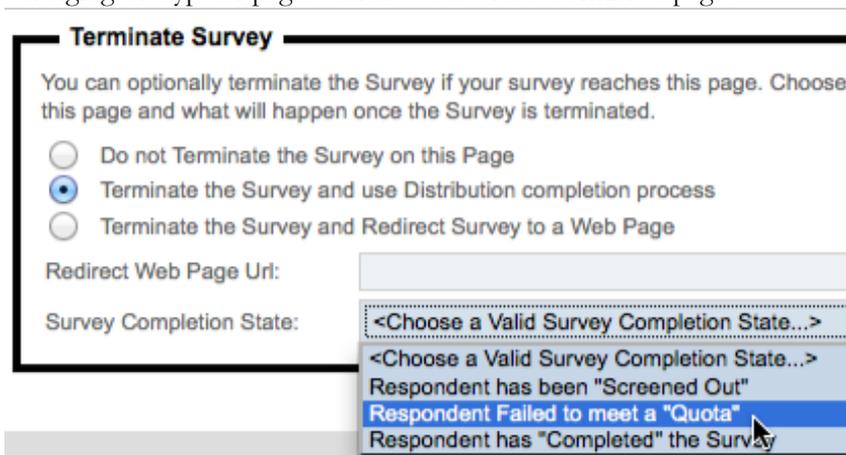
Quota Fail Terminate Page

We need to create the **Quota Fail Terminate** Page. This is simply a matter of creating a page in the survey, then:

1. Clicking the *Edit button* to edit the page details



2. Changing the type of page to indicate that it is a terminate page.

A screenshot of a dialog box titled "Terminate Survey". The text inside reads: "You can optionally terminate the Survey if your survey reaches this page. Choose this page and what will happen once the Survey is terminated." There are three radio button options: "Do not Terminate the Survey on this Page", "Terminate the Survey and use Distribution completion process" (which is selected), and "Terminate the Survey and Redirect Survey to a Web Page". Below these are two input fields: "Redirect Web Page Url:" and "Survey Completion State:". The "Survey Completion State:" dropdown menu is open, showing a list of options: "<Choose a Valid Survey Completion State...>", "<Choose a Valid Survey Completion State...>", "Respondent has been 'Screened Out'", "Respondent Failed to meet a 'Quota'", and "Respondent has 'Completed' the Survey". The "Respondent Failed to meet a 'Quota'" option is highlighted in blue.

A terminate page is different to a normal page because:

- It has a submit button, not a next button on it. This means it will be the last page seen by the respondent in the survey.
- It has the ability to redirect to a specific location - which is very important when integrating with external respondent panels (a point we will discuss more fully in a future chapter).

Creating Our Quotas

So far we have the questions that are used in our quota, and we have a terminate page. What we are lacking is a calculation of the quotas, and a survey flow to properly handle the showing or hiding of the terminate page. Let's look at these issues in turn.

Using the Quota Builder

We have to set up quite a few quotas in this survey. In fact, we have to set up:

2 Genders x 7 Age Ranges = 14 Gender/Age Quotas *and* 5 Location Quotas

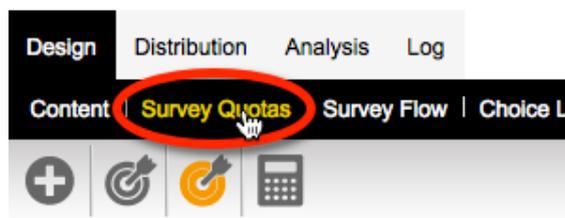
That's a total of 19 Quotas.

While setting each quota up manually can be done, fortunately Web Survey Creator has a **Quota Builder** that does most of the work for us. It let's us create related quotas in a single process.

Creating the Gender/Age Quotas

Let's create the gender and age quotas first. The steps for creating these quotas are as follows:

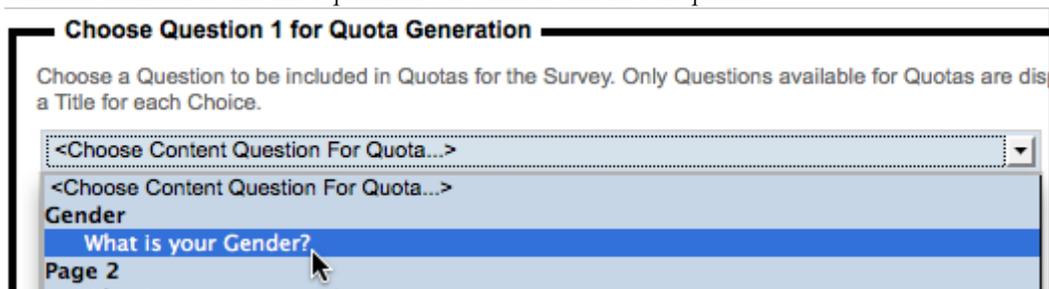
1. Click on the **Survey Quotas** menu under the **Design** tab



2. Choose the **Quota Builder** from the toolbar



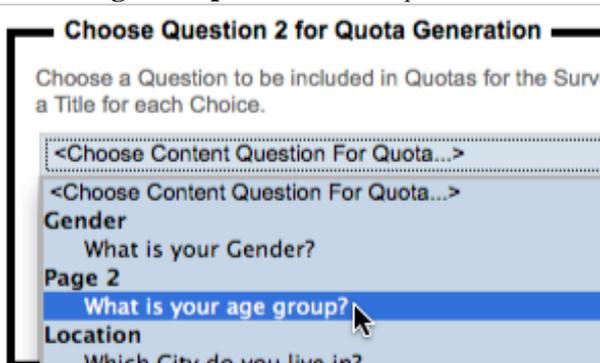
3. Choose **Gender** as the first question we want to use in our quotas



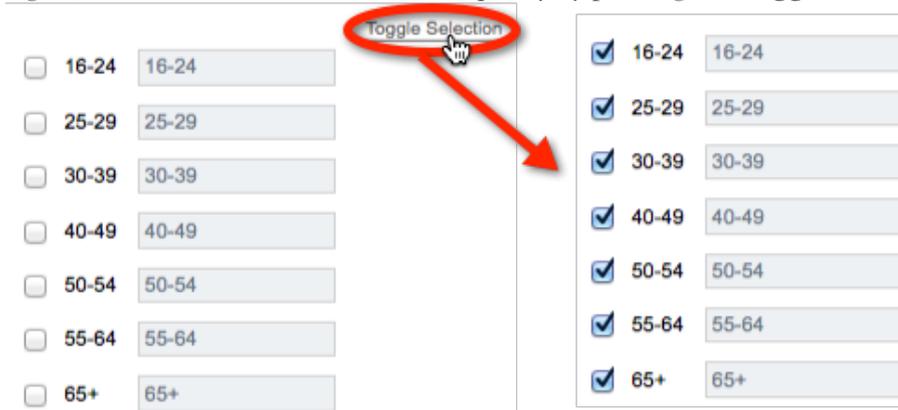
4. Choose both of the values for this question to indicate that they will both be used in the quota (note that we can optionally change how they will be described in the quota)



- Choose **Age Group** as the second question we want to use in our quotas



- Again, choose all values. We can do this quickly by pressing the **Toggle Selection** link



- Press the **Set Quota Limits** button



- All combinations of the choices selected will be presented ready for quota numbers to be entered

| # | Title | Quota Access Code | Limit |
|----|---------------|-------------------|-------|
| 1 | Male, 16-24 | MALE16-24 | 0 |
| 2 | Male, 25-29 | MALE25-29 | 0 |
| 3 | Male, 30-39 | MALE30-39 | 0 |
| 4 | Male, 40-49 | MALE40-49 | 0 |
| 5 | Male, 50-54 | MALE50-54 | 0 |
| 6 | Male, 55-64 | MALE55-64 | 0 |
| 7 | Male, 65+ | MALE65 | 0 |
| 8 | Female, 16-24 | FEMALE16-24 | 0 |
| 9 | Female, 25-29 | FEMALE25-29 | 0 |
| 10 | Female, 30-39 | FEMALE30-39 | 0 |
| 11 | Female, 40-49 | FEMALE40-49 | 0 |
| 12 | Female, 50-54 | FEMALE50-54 | 0 |
| 13 | Female, 55-64 | FEMALE55-64 | 0 |
| 14 | Female, 65+ | FEMALE65 | 0 |

9. Enter the quota numbers as per the original request from Worldburger

| # | Title | Quota Access Code | Limit |
|---|-------------|-------------------|-------|
| 1 | Male, 16-24 | MALE16-24 | 34 |
| 2 | Male, 25-29 | MALE25-29 | 36 |
| 3 | Male, 30-39 | MALE30-39 | 47 |

10. Press the **Save Quotas** button



The Quotas will all be shown under **Survey Quotas** on the **Design** tab.

| Quota Title | Code | Limit | In Quota | Remaining |
|-------------------------------|-------------|-------|----------|-----------|
| Female, 16-24 | FEMALE16-24 | 33 | - | 33 |
| Female, 25-29 | FEMALE25-29 | 36 | - | 36 |
| Female, 30-39 | FEMALE30-39 | 48 | - | 48 |
| Female, 40-49 | FEMALE40-49 | 43 | - | 43 |
| Female, 50-54 | FEMALE50-54 | 25 | - | 25 |
| Female, 55-64 | FEMALE55-64 | 37 | - | 37 |
| Female, 65+ | FEMALE65 | 46 | - | 46 |
| Male, 16-24 | MALE16-24 | 34 | - | 34 |
| Male, 25-29 | MALE25-29 | 36 | - | 36 |
| Male, 30-39 | MALE30-39 | 47 | - | 47 |
| Male, 40-49 | MALE40-49 | 41 | - | 41 |
| Male, 50-54 | MALE50-54 | 25 | - | 25 |
| Male, 55-64 | MALE55-64 | 36 | - | 36 |
| Male, 65+ | MALE65 | 38 | - | 38 |

Creating the Location Quotas

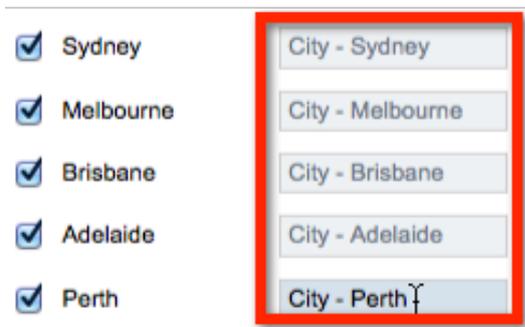
The location quotas can be created in the same way as the gender/age quotas - in fact, they are even easier to create, since all the quotas are only based on a single question - *City lived in*.

We need to choose all values except “None of the above”, which would be inappropriate as a quota.

Which City do you live in?

| | | |
|-------------------------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> | Sydney | Sydney |
| <input checked="" type="checkbox"/> | Melbourne | Melbourne |
| <input checked="" type="checkbox"/> | Brisbane | Brisbane |
| <input checked="" type="checkbox"/> | Adelaide | Adelaide |
| <input checked="" type="checkbox"/> | Perth | Perth |
| <input type="checkbox"/> | None of the above | None of the above |

Quotas are shown alphabetically in the Quotas Browse - but we want the cities to appear together. We can do this by changing the descriptors for the cities before saving.



Once the location quotas are added, they will also be shown at the top of the **Survey Quotas Browse** (because they are first in the alphabetical order).

| Quota Title | Code | Limit | In Quota | Remaining |
|----------------------------------|-------------|-------|----------|-----------|
| City - Adelaide | ADELAIDE | 51 | - | 51 |
| City - Brisbane | BRISBANE | 103 | - | 103 |
| City - Melbourne | MELBOURNE | 152 | - | 152 |
| City - Perth | PERTH | 62 | - | 62 |
| City - Sydney | SYDNEY | 157 | - | 157 |
| Female, 16-24 | FEMALE16-24 | 33 | - | 33 |
| Female, 25-29 | FEMALE25-29 | 36 | - | 36 |

Adding Quota Fail Terminate Page logic

We have already created our quota terminate - there's just one problem!

If survey flow logic is not added to hide a terminate page, the page will always be shown - and every respondent will be terminated!

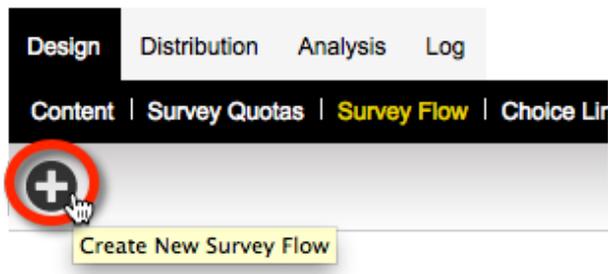
Now that we have our quotas set up, we can correctly hide the terminate page (since the hide rule will be directly related to whether a respondent can fit in the quotas).

The steps for creating our terminate page logic are as follows:

1. Click on **Survey Flow** under the **Design** tab.



2. Add a **New Flow**



3. Choose to hide the terminate page

4. Click the **Save & Continue to Add Conditions** button



5. Click **Add Condition**

6. Choose to **test all the quotas**, as shown below

Compare...

To build a condition you must first select an answer to a Question or information about a Respondent

Test Respondent's Inclusion in a Quota

Using Condition...

Choose how you would like to check Quotas. You can choose whether the Respondent is included or excluded in a Quota if their answers meet the Quota Rules. Quota Rules are tested at the point of when the question is answered.

Condition:

Respondent meets criteria without exceeding Quotas
Respondent meets one or more of the criteria
Respondent doesn't meet any of the criteria

Choose Quotas to test:

- Male, 50-54 (25)
- Male, 55-64 (36)
- Male, 65+ (38)
- Female, 16-24 (33)
- Female, 25-29 (36)
- Female, 30-39 (48)
- Female, 40-49 (43)
- Female, 50-54 (25)
- Female, 55-64 (37)
- Female, 65+ (46)
- City - Sydney (157)
- City - Melbourne (152)
- City - Brisbane (103)
- City - Adelaide (51)
- City - Perth (62)

7. Click **Save Condition**



The terminate page will now only be shown under the following conditions:

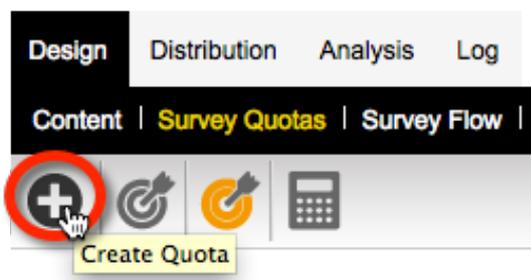
1. The respondent matches at least one of the quotas
2. All of the quotas attached to the respondent still have room (the only exception to this rule is if **Priority Quotas** exist, as discussed in the previous section).

Manual Adjustment of Quotas

If you need to add or edit single quotas, you can do this through the Quota Management System.

Adding a Single Quota

To add a single Quota, click on the *Create Quota* toolbar button.



All details for the quota need to be entered, including a title for the quota.

Quota Details

Please enter a title to describe your Survey Quota.

Survey Quota Title:

Quota Access Code:

Quota Response Limit:

Quota Overflow:

The Quota Rules can be added one at a time, in a similar way to flow control.

Compare...

To build a condition you must choose a Question that you want to have tested

Using Condition...

Choose how you would like to check this answer. For Example, for a "Multiple Choice, Radio Butt Selected" and then select the choices to compare.

Condition:

Any Choice Selected

No Choice Selected

Male

Female

Editing a Quota

Editing a Quota is simply a matter of clicking on the Quota Title in the Quota Browse.

| Quota Title | Code | Limit |
|----------------------------------|-----------|-------|
| City - Adelaide | ADELAIDE | 51 |
| City - Brisbane | BRISBANE | 103 |
| City - Melbourne | MELBOURNE | 152 |

Editing Multiple Quotas at once

If you need to modify quotas, quite often it's going to be one the following details that needs to be changed:

- How many people you are looking for in the quota
- How much of an overflow you will allow
- The access code or description for the quota

Web Survey Creator makes it easy to modify these details *en masse* by clicking on the **Update All** toolbar button under **Survey Quotas**.



Titles, access codes, limits and overflow amounts can all be adjusted from a single screen.

Quota Titles and Limits - English

Listed here are all existing Quotas. For each Quota you can edit the title, code and how many responses the Quota is limited to.

| # | Title | Quota Access Code | Limit | Overflow |
|----|------------------|-------------------|-------|----------|
| 1 | City - Adelaide | ADELAIDE | 51 | 0 |
| 2 | City - Brisbane | BRISBANE | 103 | 0 |
| 3 | City - Melbourne | MELBOURNE | 152 | 0 |
| 4 | City - Perth | PERTH | 62 | 0 |
| 5 | City - Sydney | SYDNEY | 157 | 0 |
| 6 | Female, 16-24 | FEMALE16-24 | 33 | 0 |
| 7 | Female, 25-29 | FEMALE25-29 | 36 | 0 |
| 8 | Female, 30-39 | FEMALE30-39 | 48 | 0 |
| 9 | Female, 40-49 | FEMALE40-49 | 43 | 0 |
| 10 | Female, 50-54 | FEMALE50-54 | 25 | 0 |
| 11 | Female, 55-64 | FEMALE55-64 | 37 | 0 |
| 12 | Female, 65+ | FEMALE65 | 46 | 0 |
| 13 | Male, 16-24 | MALE16-24 | 34 | 0 |
| 14 | Male, 25-29 | MALE25-29 | 36 | 0 |
| 15 | Male, 30-39 | MALE30-39 | 47 | 0 |
| 16 | Male, 40-49 | MALE40-49 | 41 | 0 |
| 17 | Male, 50-54 | MALE50-54 | 25 | 0 |
| 18 | Male, 55-64 | MALE55-64 | 36 | 0 |
| 19 | Male, 65+ | MALE65 | 38 | 0 |

Tracking Quotas

Quotas can be easily tracked under **Survey Quotas**, as we have already seen. This works well if you have set up the survey, and you are a Web Survey Creator user, but what if you are an outsider - like a client?

Let's assume that the management at Worldburger wants to keep an eye on the progress of the survey. Fortunately there is a way for them to do this in WSC - through a *Web Portal*.

A Web Portal can show a number of things including:

Current Status of Quotas

All quotas are listed, together with the number of respondents who are currently "In Quota" and how many are still needed.

My Portal Sample



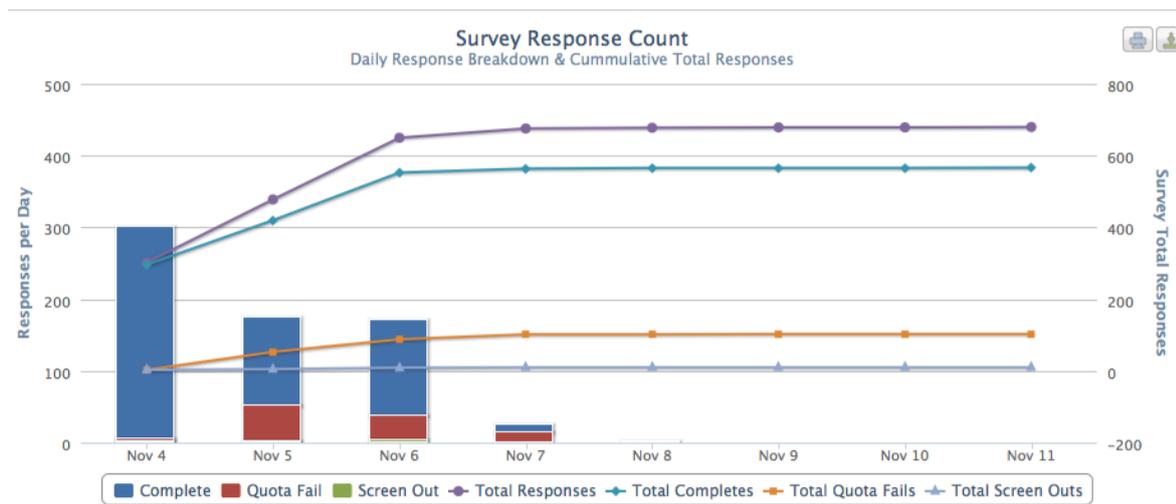
Survey Quotas

The current status of all survey quotas are shown in the table below.

| Quota Title | Limit | In Quota | Remaining | Draft |
|----------------------------------|----------|----------|-----------|-------|
| City - Adelaide | 51 | 51 | - | 8 |
| City - Brisbane (inc Gold Coast) | 103 (17) | 118 | 2 | 14 |
| City - Melbourne | 152 (28) | 185 | - | 27 |
| City - Perth | 62 | 50 | 12 | 2 |
| City - Sydney | 157 | 162 | - | 20 |
| Female, 16-24 | 33 (7) | 36 | 4 | 6 |

Response Counts

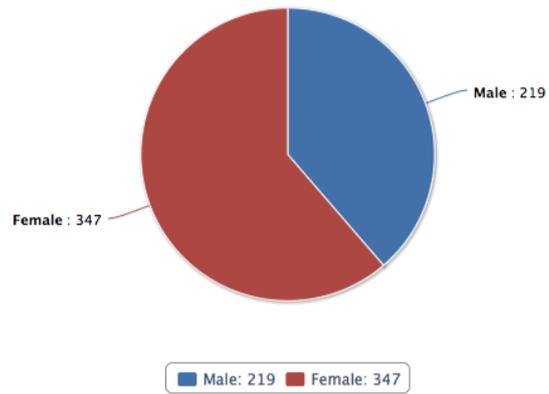
A daily count of responses is shown, together with a cumulative total - broken down by type (quota outs etc.)



Individual Question Statistics

Current counts for responses to each of the questions in the survey.

What is your gender?

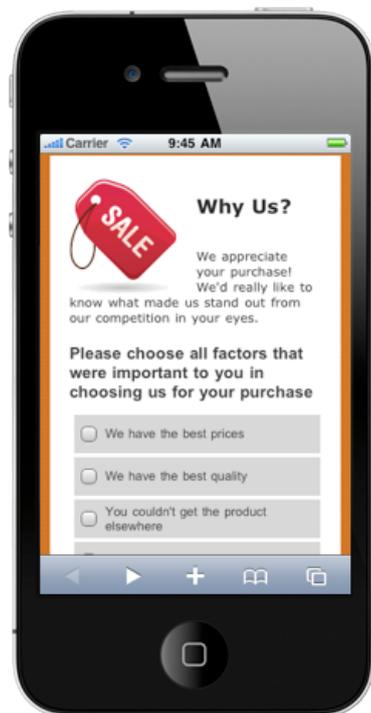


27 February 2012

Mobile Web Surveys

The world of Surveys is currently changing at a pace not seen since the original shift to the Web. Having a Web Survey is no longer enough - your surveys now need to be accessible on mobile devices.

“Smart phones” are your window into higher response rates, and more satisfied respondents.



Mobile vs. Desktop

The expectations that respondents now have when it comes to Web Surveys are quite easy to quantify. Unfortunately they are not so easy to meet, since many of the expectations are not easy to achieve.

| Expectation | Problem |
|---|--|
| Survey completion on a mobile device or a desktop computer - not just one | Many survey solutions have full-featured “desktop” and cut-down “mobile” versions. Choose one or other when setting up (not both). |
| “Sexy” surveys | “Sexy” usually equals flash-based desktop questions. Not mobile compatible. |
| If using a mobile device, survey is still full-featured | Usually formatting and functionality on mobile devices is cut down |

The existence of mobile devices with true Web browser capabilities is a relatively new phenomenon (some suggest it began with the iPhone in 2007) and many of the gaps between expectations and the reality of Web Surveys on mobile devices is simply a result of large, established software packages still trying to “catch up” with the expectation.

Going “half-way” with cut-down mobile-specific survey tools misses the point - people have “cool” mobile devices and expect the things they do on those devices to be “cool” as well.

There is an added benefit to getting to people via their mobile phone or tablet - the sorts of people who use these devices are often the younger demographic that are so hard to get any response out of.

The humble P.C. is far from dead...

Regardless of how much people like using their mobile devices, there is still an important place for desktop (and laptop) computers. It is therefore critical that a Web Survey continues to work well in a standard PC environment. There are a number of benefits to this environment that will never be eradicated by the onslaught of mobile devices:

1. Large amounts of text are easier to enter on a full-sized keyboard
2. Virtually every household has a PC (and can share it, unlike personal mobile devices) for completion of surveys
3. A significant percentage of respondents do not have or want smart mobile devices
4. Older generations often feel more comfortable using a PC, since that is what they are used to

Mobile doesn't have to mean basic

With use of the right technologies, there is only really one limitation that you have to work around on a mobile device...

Mobile devices have less screen real estate than desktops. The interface provided must take this into account.

Layout Management

Images need to be resized, and wide layouts changed to fit a mobile screen.



Advanced text question types - like demographics - look best using a form-style layout on a desktop. Again, on a mobile device, the layout needs to be modified.



Text Entry

On a desktop, text entry is easy - the keyboard is the primary input device. On a mobile, text fields not only need to be formatted for the screen - they also need to work with the input system on the device.



Question “Morphing”

Some question types simply cannot be used on a mobile because the screen size simply doesn't allow for a useable experience. An example is a matrix question, which requires the full width of the screen to be able to be entered on a desktop.



Keeping the “Sexy” in your Surveys

One of the biggest issues faced when supporting mobile devices is to avoid losing all the “sexy” capabilities that respondents have become used to.

Gotta have Video!

Many market research surveys use video as a way to show product material such as advertisements.



Touch-enabled Sliders

Sliders are used more and more in surveys. It’s important to have the same capability on mobile devices - including advanced implementations like the component breakdown slider question below.



Drag 'n' Drop

Mobile users love their touch-screen smartphones. Drag 'n' drop needs to be available on the phone to mimic dragging operations on the desktop version of survey questions.



Going Mobile: Working smarter, not harder

If you want to create Web Surveys that support both mobile and desktop respondents, you need to adhere to some rules when looking for a Web Survey design tool:

1. Never use flash-based questions. They immediately exclude mobile users
2. Avoid solutions that split mobile and desktop survey design into separate modules - you'll be doing twice the work, and possibly have incompatibilities due to limitations in the mobile version
3. Avoid survey solutions for desktop respondents that have mobile capabilities "tacked on". Mobile is too important to be an afterthought.
4. Avoid overly basic mobile survey capabilities - you'll be able to get to mobile users, but not with the kind of survey you need to create.

An Example Survey

The example we will be reviewing in this section has been created in Web Survey Creator. Images of mobile survey capabilities in the previous section came from this example.

To see the full example, visit the WSC sample online:

<http://www.websurveycreator.com/c/survey-sample-3.aspx>

WSC Sample: Mobile Survey Features

This sample survey explains the features WSC provides to support the highest quality mobile survey experience in the industry.

Start Survey

Every survey created by Web Survey Creator is viewable and fully functional on a mobile device, so in that respect, there is nothing special about this sample. We have created this sample to make you more aware what we are doing behind the scenes to make the mobile experience so good. This survey works equally well on a desktop, tablet or mobile so feel free to use the device of your choice! That's actually the whole idea of course...

Making a WSC survey mobile-capable

A survey can tell what browser - and therefore what type of device - it is being run on. Web Survey Creator uses this information to determine how a survey will be displayed.

What do you need to do to make a WSC survey work on a mobile device?

NOTHING

Any survey created in Web Survey Creator will work on a mobile device - they whole basis of the system is you design a survey once and it can be used everywhere.

Mobile Feature Sample

Progress 90%

What percentage of your time do you spend...?

| Activity | % of your time online |
|-------------|-----------------------|
| Emailing | 34% |
| Online Bank | 26% |
| Social Netw | 15% |
| View News | 0% |
| Online Shop | 0% |
| Online Gam | 0% |
| Video Stre | 0% |
| Web Games | 0% |

75%

Targeting Specific Platforms

While Web Survey Creator will manage surveys on a mobile device automatically, there may be times when you actively want to do something different for respondents who answer on a mobile as opposed to people who answer on a PC (or on a tablet for that matter).

Whenever Web Survey Creator shows a survey to a respondent, it determines which of the following types of device is being used to view the survey:

| | |
|---------------|--|
| PC | Computer running a full PC operating system such as Microsoft Windows or Mac OSX. These are the types of machines that have traditionally been used to complete surveys. |
| Tablet | Mobile devices that have moderately sized (7"+) touch-screens, and are generally referred to as "tablets" (e.g. iPad, Samsung Galaxy Tab) |
| Mobile | Mobile devices with relatively small screens (<5") that are generally referred to as "Smartphones". |

Web Survey Creator can determine the type of device from the browser that is running on the device. Knowing which device is being used can open opportunities to change the behavior of the survey for different devices.

Device Targeting through Flow Control

Our Mobile Survey Sample doesn't have a single introduction page - it has three. It has one for each type of device.



While multiple introduction pages is certainly not mandatory - since WSC will render a single page correctly on all three styles of device - it does give some flexibility in survey design. It allows the designer of the survey:

To show different introduction text based upon the type of device being used.

1. PC

Welcome to the Mobile Survey Demonstration!

OK, so you're not running this survey on a mobile phone or a tablet at the moment, are you?

That's fine - this demonstrates exactly how surveys created in Web Survey Creator work. Three distinct types of device are supported automatically when a survey is rendered - PCs, Tablets and Mobile Phones.

2. Tablet

Welcome to the Mobile Survey Demonstration!

Cool - it looks like you are running this survey on a Tablet. It will work pretty much like a survey on a PC, except that the sizing will suit a tablet, and the touch interface is supported for all questions.

3. Mobile



You can proactively limit content based upon the device. In our example survey, the introduction for mobile phones is shorter and does not contain any images - taking into account the fact that the survey is likely to be done on a 3G network.

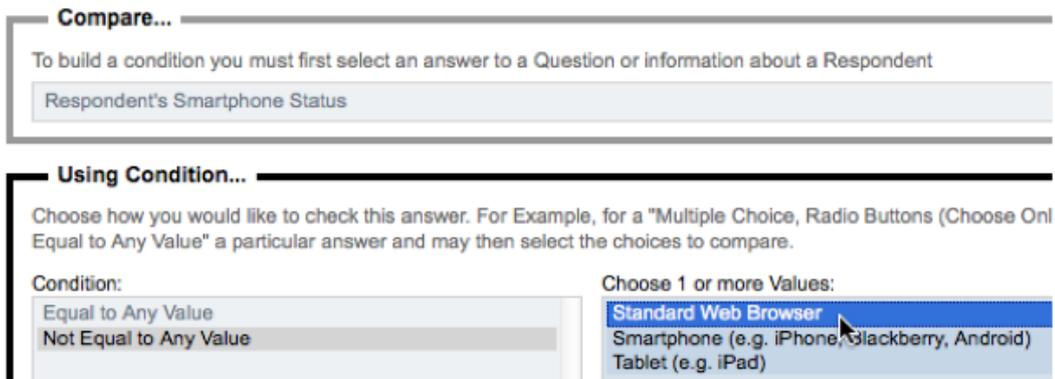
Setting up Flow Control

To set up the introduction pages in the sample, we did the following:

1. We created three pages - one for each of the devices we wanted to target



2. We then created three survey flow rules - one rule each for the introduction pages. The rules tested the type of device that way being used to view the survey



Research Panel Integration

Respondents for Web Surveys often come from Research Panels. These panels can be used to find people who fit the required demographics for the survey.

Web Survey Creator can work generically with any standard panel, or can fully integrate with a panel if it uses the popular Contact Profiler panel software.



Overview of Research Panels

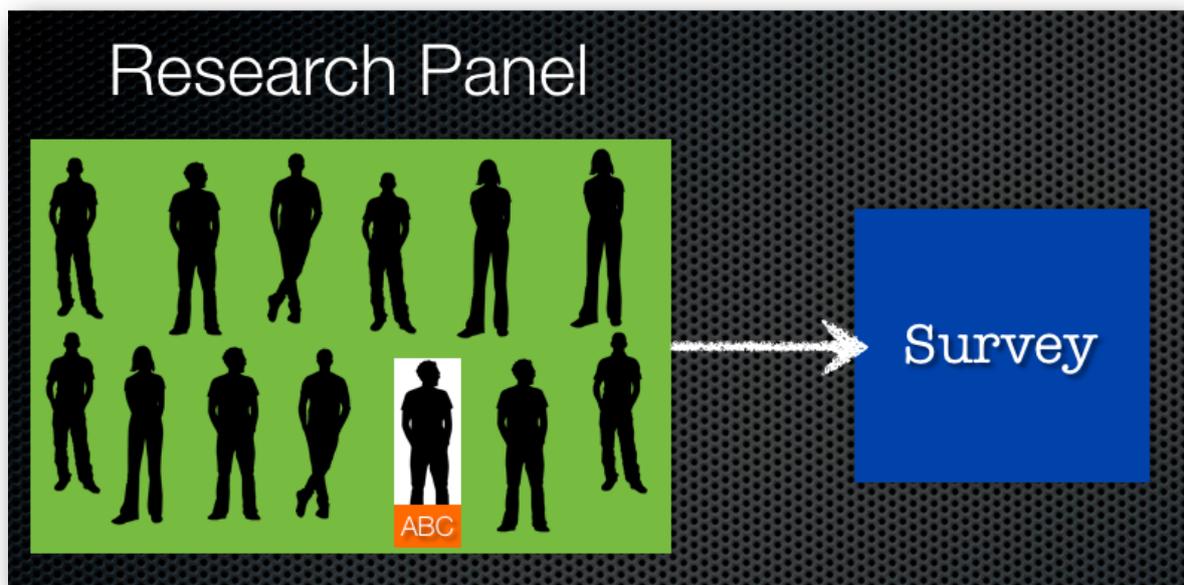
Research Panels provide a good source of survey respondents with specific attributes such as certain ages, genders and locations.

These panels must track how their members are used, so that:

1. the members can be rewarded for their effort
2. and fees can be paid to the panel provider for their use in a survey

For this tracking to be possible, there has to be communication between the survey and the panel provider's software.

A panel member who completes a survey must be flagged with an identifier that is chosen by the panel provider so that they can be matched up to their panel.

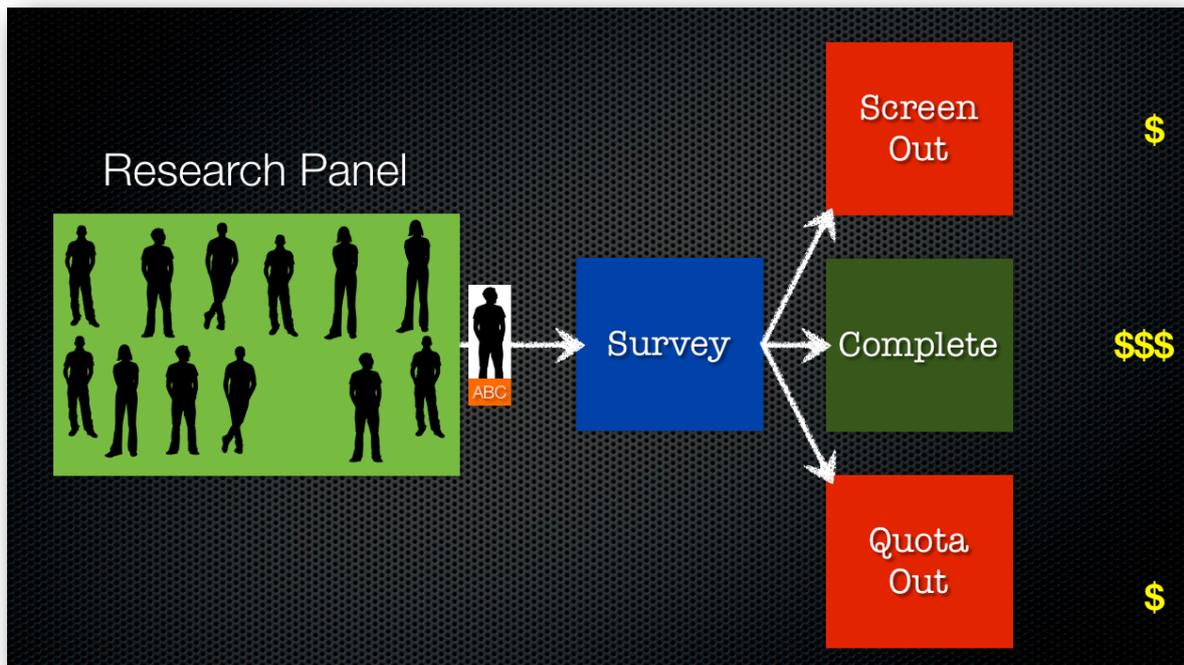


This means that there needs to be a mechanism for this data to be passed into the survey.

Upon completion of the survey, the panel provider needs to be told how the panel member went in the survey – things such as:

1. Did they complete the survey?
2. Were they screened out because they were an unsuitable respondent?
3. Were they quota-ed out because we already had enough responses from their type of respondent?

The panel provider, based upon this information, can determine rewards and fees.



Using a Research Panel

Setting a respondent's unique code

OK, so let's start by looking at how we can use an identifier provided by a panel provider.

Our starting point is to use a standard anonymous survey distribution.

For example, I could have a survey link that looks as follows:

<http://survey.websurveycreator.com/s/myresearchsurvey>

A unique ID can be set for each respondent who completes the survey, by simply passing the ID to the survey link as follows:

<http://survey.websurveycreator.com/s.aspx?s=f4ef1799-2413-4514-b5ef-9ff20e1de322&usr={Unique Code}>

The passing of a unique code to each respondent would be handled by the panel management system, since it would be sending out the invitations.

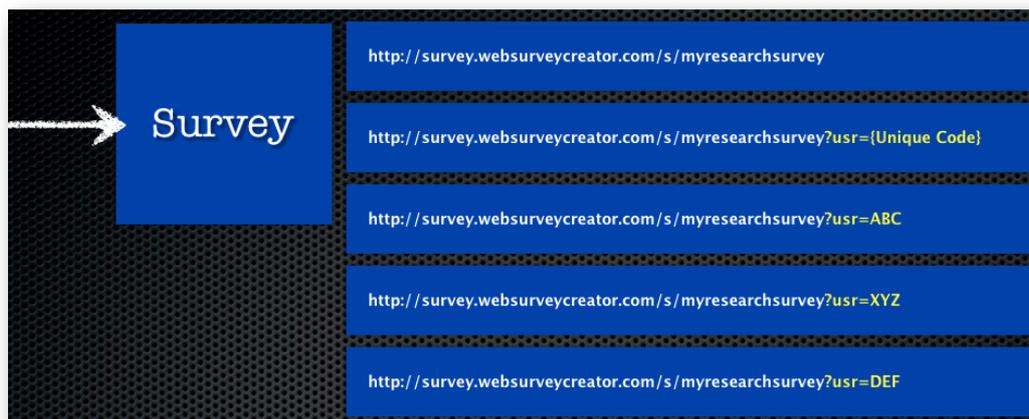
Therefore, the links sent to three different respondents could look something like the following:

<http://survey.websurveycreator.com/s.aspx?s=f4ef1799-2413-4514-b5ef-9ff20e1de322&usr=1000>

<http://survey.websurveycreator.com/s.aspx?s=f4ef1799-2413-4514-b5ef-9ff20e1de322&usr=1001>

<http://survey.websurveycreator.com/s.aspx?s=f4ef1799-2413-4514-b5ef-9ff20e1de322&usr=ABC>

Codes can be any combination of letters and numbers up to 50 characters long.



Passing back the Survey Result

Once a respondent completes a survey, the panel management system will need to be notified about the respondent's completion status.

This is achieved by redirecting back to the panel management system at the conclusion of the survey.

In general, two pieces of information are provided as part of the redirect:

1. The respondent's identifier
2. A code indicating the status of the respondent's response

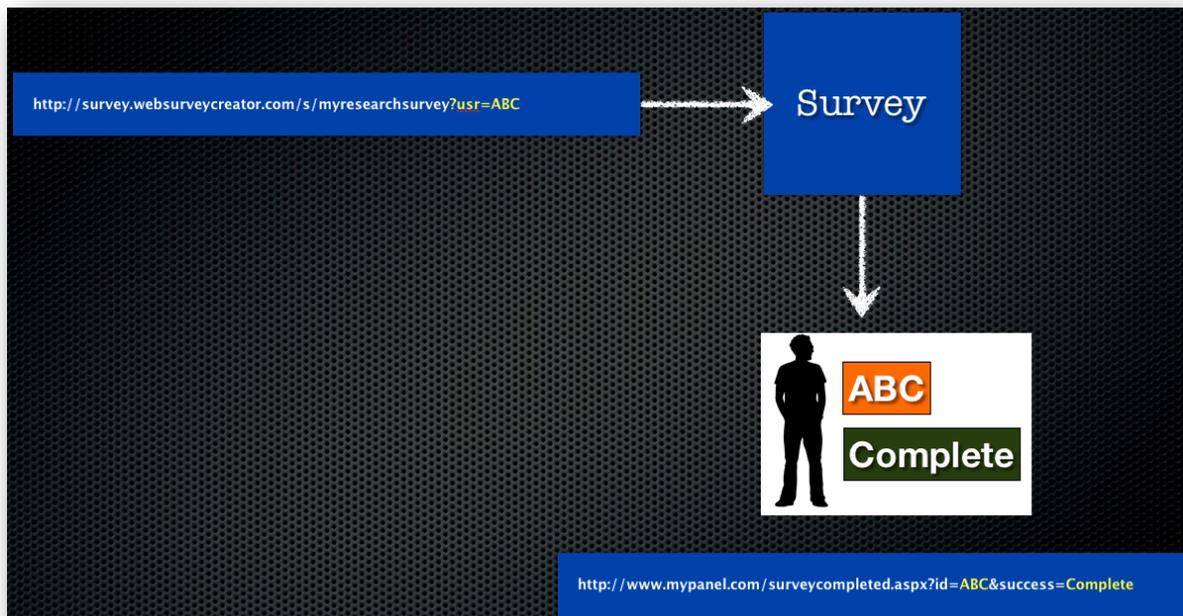
The identifier is simply a passing back of the unique code that was given to Web Survey Creator when the respondent commenced the survey.

The code to indicate status will generally be one of three possibilities – a code indicating:

1. a complete
2. a screen out; or
3. a quota out

An example of a redirect URL could look as follows:

`http://www.mypanel.com/surveycompleted.aspx?id=ABC&success=Complete`



The different URLs needed are set up on the different Terminate Pages throughout the survey. For more information on Terminate Pages, see the discussion in an earlier chapter of this book.

Panel Example: SurveyVillage

Let's consider a real-life example, using the Australian "SurveyVillage" panel.

When we set up our redirection URLs, we make sure we pass the code that was sent through to the survey, together with the necessary "ActionCode".

SurveyVillage provides the format of the URL.

We simply place a Recall Code into the URL so that the respondent is identified with the same code that was passed through when the respondent commenced the survey.

The URLs for Completes, Screen-outs and Quota-outs are shown here.

Completes

`http://www.surveyvillage.com/WebJobFinish.aspx?SurveyCode=x520afgv5rt2umlqwja8&ContactId=RECALLCODE&ActionCode=q2yf4`

Screen Outs

`http://www.surveyvillage.com/WebJobFinish.aspx?SurveyCode=x520afgv5rt2umlqwja8&ContactId=RECALLCODE&ActionCode=xry64`

Quota Outs

`http://www.surveyvillage.com/WebJobFinish.aspx?SurveyCode=x520afgv5rt2umlqwja8&ContactId=RECALLCODE&ActionCode=q5jd8`

You will notice that the only difference in the URLs is the “Action Code”.

All we need to do in Web Survey Creator is place the re-directions at the appropriate place in the survey structure.

Completes will get to the end of the survey. We will therefore change the redirect that appears on the Survey Complete terminate page that appears at the end of our survey.

Terminate Survey

You can optionally terminate the Survey if your survey reaches this page. Choose whether you want to terminate the Survey on this page and what will happen once the Survey is terminated.

Do not Terminate the Survey on this Page

Terminate the Survey and use Distribution completion process

Terminate the Survey and Redirect Survey to a Web Page

Redirect Web Page Url:

Survey Completion State:

Screen Outs will occur for people who end up on the Screen Out terminate page. We therefore need to adjust the redirect on this page.

Terminate Survey

You can optionally terminate the Survey if your survey reaches this page. Choose whether you want to terminate the Survey on this page and what will happen once the Survey is terminated.

Do not Terminate the Survey on this Page

Terminate the Survey and use Distribution completion process

Terminate the Survey and Redirect Survey to a Web Page

Redirect Web Page Url:

Survey Completion State:

Quota Outs will occur for people who end up on the Quota Out page. We therefore need to adjust the redirect on this page.

Terminate Survey

You can optionally terminate the Survey if your survey reaches this page. Choose whether you want to terminate the Survey on this page and what will happen once the Survey is terminated.

Do not Terminate the Survey on this Page

Terminate the Survey and use Distribution completion process

Terminate the Survey and Redirect Survey to a Web Page

Redirect Web Page Url:

Survey Completion State:

OK, great! Our survey is now ready to be used with the SurveyVillage panel.

Integration of Web Surveys with Contact Profiler

What is Contact Profiler?

Contact Profiler (CP) is a Web Application that can be used to manage respondent panels. It has been developed in close co-operation with the team that developed Web Survey Creator.

This means that:

- A level of integration is possible that simplifies many of the tasks described in the previous chapter
- Additional capabilities are available - including updating panel data with responses from the integrated survey.

Why use Integration?

The steps described earlier in this chapter are pretty straightforward and will work with any panel, so why worry about closer integration? There are a number of benefits:

1. Integration hides the technical aspects of the process completely, making it easier to understand
2. The easier the setup, the less chance there will be any mistakes. We're dealing with URLs and codes - a mis-typed letter can cause havoc
3. It's quicker to set up!
4. Features like updating of panel profile information are only available through true integration

Who can use Integration?

Contact Profiler integration is available to organizations who use both CP and WSC themselves. They are therefore the owners of the panel, and creators of the Web Surveys. External consumers of a research panel (who don't actually own the panel) would need to be set up using the general integration described in the previous chapter.

Web Survey Integration Overview

Users of Web Survey Creator can integrate surveys with Contact Profiler using the method described in the previous chapter. There is, however, a much quicker and simpler way of integrating.

Let's consider an example:

“Beach Burger” is a fast growing burger chain that wants to determine whether it's new healthier menu and advertising campaign is working in it's key demographic of 18-39 year olds.

A quick survey has been created in WSC for sending out to panel members in a research panel that is run in Contact Profiler.

Integration Checklist

It is important to understand how integration is achieved between WSC and CP. Part of this understanding relates to ensuring that your Web Surveys are set up correctly for integration. A checklist of things to consider is listed below.

Mandatory Checklist

The to do items in the checklist below must be completed for integration to be possible. Without them, you will be unable to set up integration.

| To Do ITEM | Details |
|---|---|
| Create a Survey in Web Survey Creator | Integration is achieved by going into Contact Profiler and choosing a survey to integrate to. You therefore need to actually create a survey in Web Survey Creator first! |
| Create a Survey Complete Terminate Page | Integration supports completes, screen-outs and quota-outs. A single survey complete terminate page must exist in the survey at a minimum. Other pages are optional |

As we can see, the list of mandatory items is minimal. If these are set up, we can provide the most basic form of integration as follows:

- Contact Profiler will be able to invite people to the survey
- People who complete the survey will be tracked, and Contact Profiler will be “informed” of their completion.

Optional Checklist

While the following to do items are not mandatory, they allow significantly more functionality to be achieved in the integration process.

| To Do ITEM | Details |
|--|---|
| Create a Screen Out Terminate Page | A single Screen Out terminate page can be created to track people that are unsuitable for the survey and therefore need to be “kicked”. |
| Create a Quota Out Terminate Page | A single Quota Out terminate page can be created to track people that are suitable for the survey, but are not needed because there is already enough of that type of respondent in the system. These people are therefore “kicked” as well. |
| Add Access Codes to Questions that match Profile Attribute Codes in CP | The most advanced feature of the integration is the updating of panel data with responses to the survey. This is achieved by matching the Access Code in WSC with the Profile Attribute Short Code in CP. Questions must also be of a compatible type, and have the same number of choices with the correct values for each choice. |

These optional items significantly extend the capabilities available through integration. In particular, the linkage between a survey and profile attributes makes it easy to keep profile data up to date, without any additional effort by panel members.

Overview of the Integration Process

Before looking at specifics, let's review the basic process that is used to integrate a Web Survey with Contact Profiler. The steps for this integration are as follows:

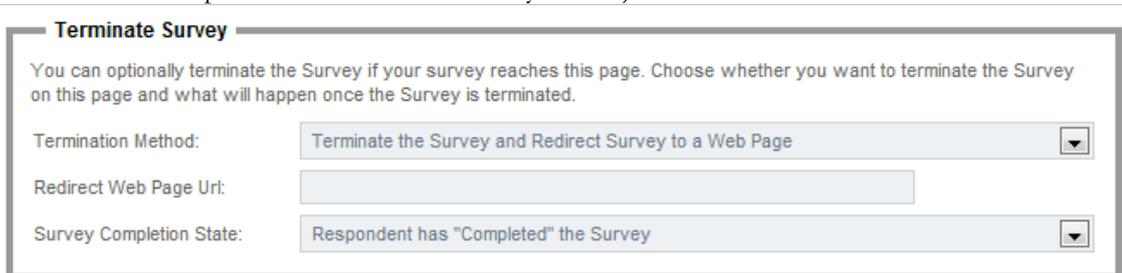
In Web Survey Creator

1. Create a Survey in Web Survey Creator



The screenshot shows a web survey interface for 'Beach Burger'. At the top, there's a header with the title 'Beach Burger Customer Survey' and a progress bar indicating 'Progress 20%'. The main content area features the Beach Burger logo (a green dinosaur head) and a 'Welcome to our Survey!' message. The message includes a welcome note, a statement about the survey's purpose, and a note of appreciation for the respondent's time. A 'Survey Time' section shows '10 Minutes' next to a clock icon. Below this, there are two questions: 'How many times have you eaten at one of our restaurants?' with radio button options for 'Never', '1 - 2 times', '3 - 5 times', '6 - 10 times', and 'More than 10 times'; and 'Would you be happy to take a short survey to help us improve our products and services?' with radio button options for 'Yes' and 'No'. A 'Next' button is located at the bottom right of the survey area. At the very bottom, it says 'Powered By WebSurveyCreator'.

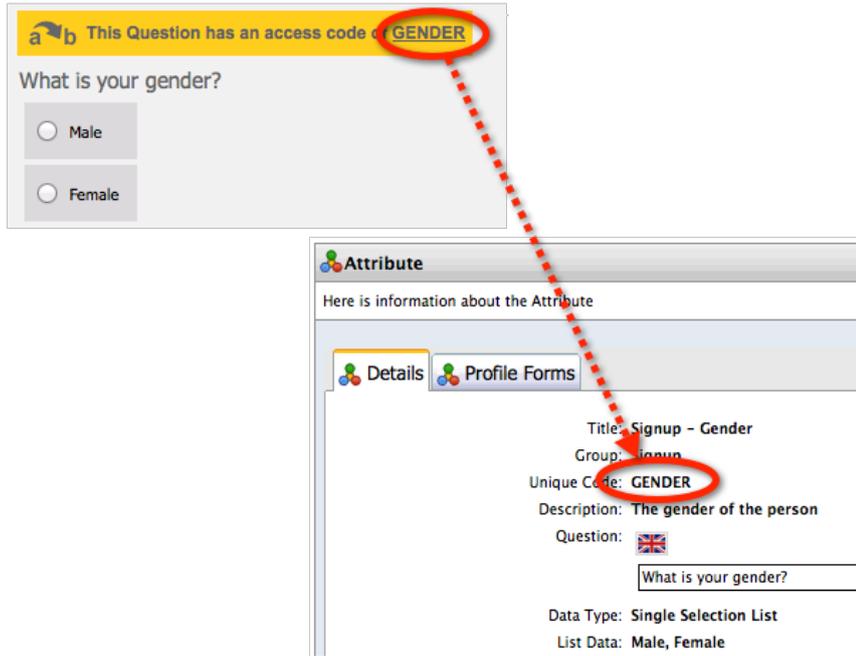
2. Ensure *at a minimum* that the survey has a “Survey Completed” terminate page (this is the page that successful respondents will see before they submit)



The screenshot shows the 'Terminate Survey' configuration page. It has a title 'Terminate Survey' and a sub-header 'You can optionally terminate the Survey if your survey reaches this page. Choose whether you want to terminate the Survey on this page and what will happen once the Survey is terminated.' Below this, there are three configuration fields: 'Termination Method:' with a dropdown menu set to 'Terminate the Survey and Redirect Survey to a Web Page'; 'Redirect Web Page Url:' with an empty text input field; and 'Survey Completion State:' with a dropdown menu set to 'Respondent has "Completed" the Survey'.

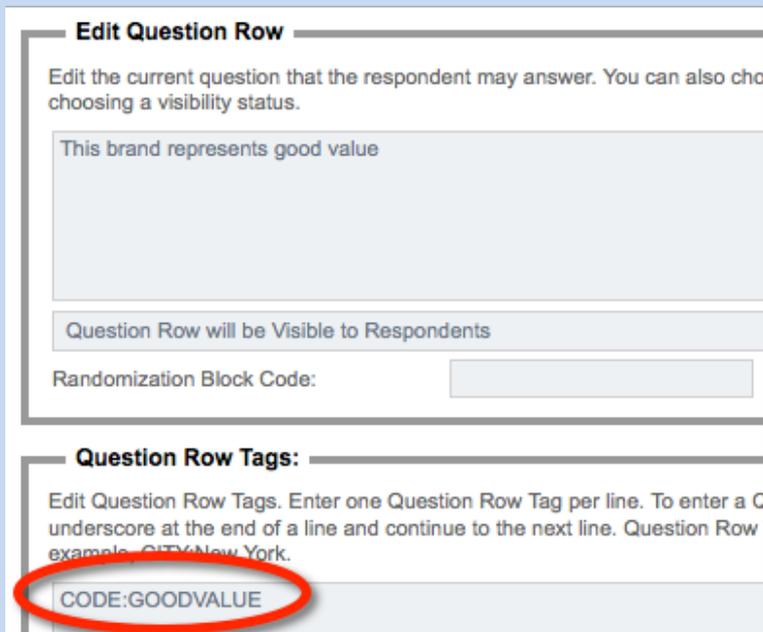
3. Optionally include Screen-Out and Quota-Out terminate pages.

- Optionally use Unique Access Codes that match the short codes used for profile attributes in Contact Profiler.



What if a Matrix Question is used in WSC?

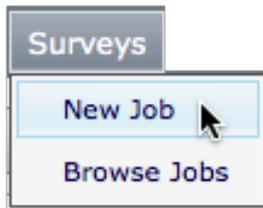
Contact Profiler does not directly support matrix questions, but they can be set up in Web Survey Creator. So how can this integration work? The issue is that each row of the matrix needs to be integrated to a single question in CP. This is achieved by adding the UNIQUE CODE as a tag on each of the rows in the matrix in WSC:



To integrate to this, CP simply needs a question with the same choices in it as the matrix, and a code of "GOODVALUE".

In Contact Profiler

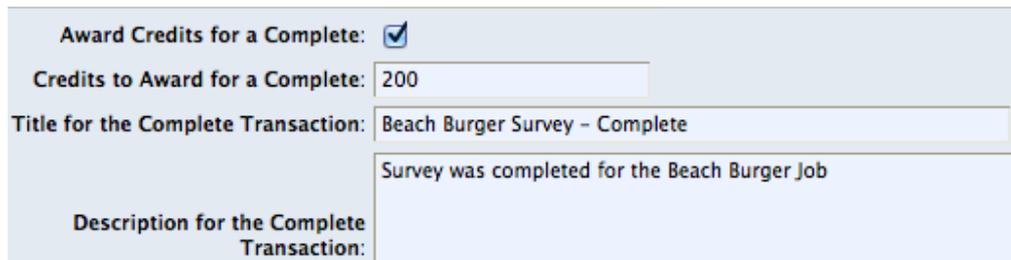
1. Create a Web Survey Job in Contact Profiler, and enter the basic job details (name etc.)



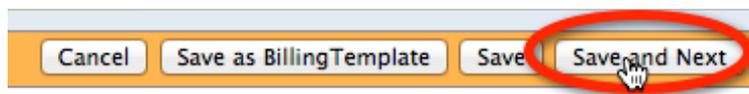
2. Go to the Content Tab for the Job



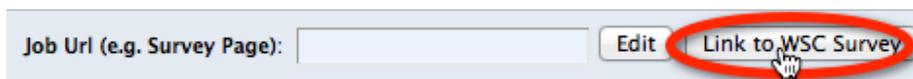
3. Enter the credits to be received by Panel Members for Completes, Screen-outs and/or Quota-outs.

A screenshot of a form titled 'Award Credits for a Complete:'. It contains several fields: a checked checkbox for 'Award Credits for a Complete:', a text input field for 'Credits to Award for a Complete:' with the value '200', a text input field for 'Title for the Complete Transaction:' with the value 'Beach Burger Survey - Complete', and a text area for 'Description for the Complete Transaction:' with the text 'Survey was completed for the Beach Burger Job'.

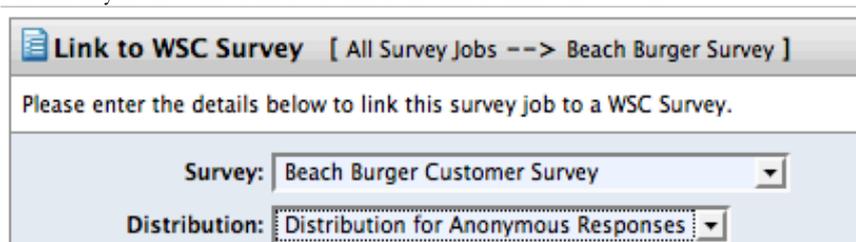
4. Click **Save and Next**



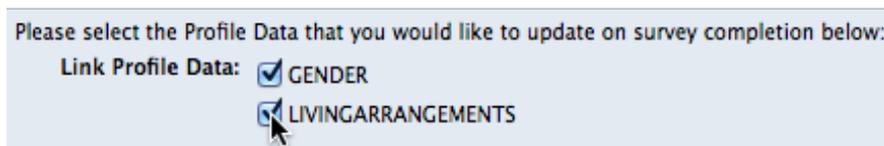
5. Click the **Link to WSC Survey** button



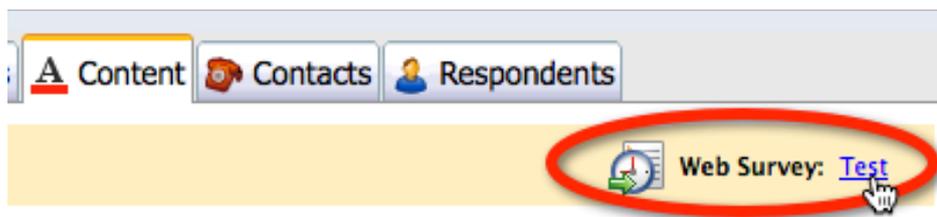
6. The Survey and Distribution must then be chosen to link to.

A screenshot of a form titled 'Link to WSC Survey [All Survey Jobs --> Beach Burger Survey]'. It contains a text input field for 'Job Url (e.g. Survey Page):', an 'Edit' button, and a 'Link to WSC Survey' button. Below the input field, there is a text area with the instruction 'Please enter the details below to link this survey job to a WSC Survey.' and two dropdown menus: 'Survey:' with the value 'Beach Burger Customer Survey' and 'Distribution:' with the value 'Distribution for Anonymous Responses'.

7. If the survey has questions with the same code as attributes in Contact Profiler, they can be connected.



8. On the **Content** tab, click the test button to test that the Web Survey is working.

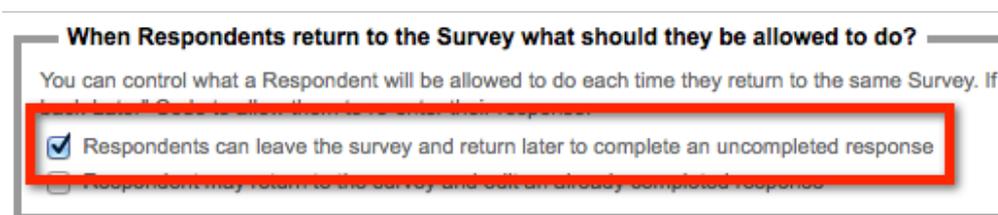


Hey, what just happened?

Integration is so quick and easy that you may wonder whether it did anything at all. While it is not crucial for the use of integration, it is handy to know what the automatic integration actually does behind the scenes.

The Survey Distribution is configured

The distribution that is chosen from the WSC survey is set up to work correctly with Contact Profiler. This is an “anonymous” distribution that uses a “come back later” code to identify respondents.



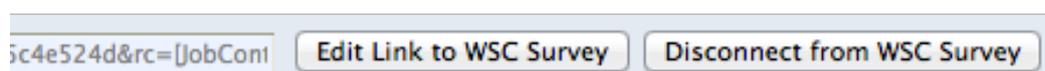
Contact Profiler will pass this code to the survey, and it will be used to send back complete, screen out and quota out codes to Contact Profiler when the survey is complete.

Contact Profiler knows the Survey Link

The content for the Web Survey Job is updated with the link to the Web Survey distribution for the WSC Web Job.



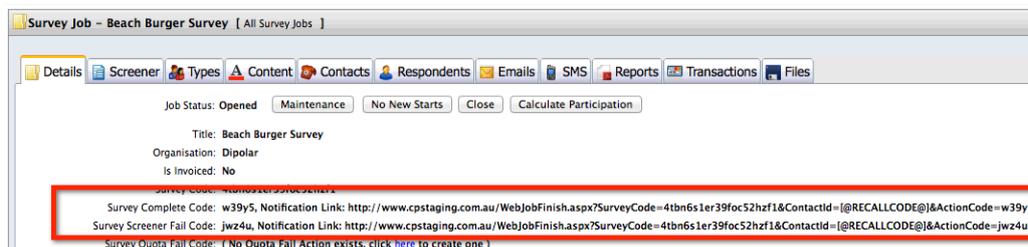
Note that if this needs to be changed or removed in the future, buttons are provided to quickly change the integration settings.



Changing the integration settings after a job has gone live could cause confusing results and is not recommended.

Web Survey Creator knows how to terminate

When a Web Survey Job is set up in Contact Profiler with Complete, Screen out and Quota Out completion details, the redirections appear on the Job Details screen:



These redirections are required in the Web Survey to indicate which of the endings has occurred for a respondent. The integration takes care of this for us. For example, on the Survey Complete terminate page, the correct URL to redirect to for a complete is added for us:

| | |
|--------------------------|--|
| Redirect Web Page Uri: | <input type="text" value="http://www.cpstaging.com.au/WebJobFinish.aspx?SurveyCode=4tb6s1"/> |
| Survey Completion State: | <input type="text" value="Respondent has 'Completed' the Survey"/> |

Profile Data is updated

This is the only completely hidden aspect of the integration. Once the survey is complete, profile data is updated in the background.

If a linked question has no data entered in the Survey, the profile update is skipped for that question (i.e. it doesn't remove the existing data). This ensures that existing profile data is not removed just because in a particular survey, the respondent fails to give an answer.

Integrating with Contact Profiler Screeners

What are Respondent Screeners?

Research Panels can be great at finding the people we need for our Web Surveys. One issue though, is that people can only be found based upon the information the panel has on them - things like age, gender, location and maybe a few general attributes.

So, what if we need to find 18-39 year old women who have eaten at Beach Burger in the last month? The age and gender can be searched on - what they ate in the last month cannot. These people need to be *screened* to determine if they are the people we are looking for.

A Screener is a short survey used to determine whether a panel member fits the specific needs of a project. It asks questions about the respondent that the panel data does not include.

Screeners in Contact Profiler

Contact Profiler has its own screener system that can be used to screen panel members for a project.



While this system is quite capable, it lacks a number of benefits that Web Survey Creator provides. Web Survey Creator surveys have the following benefits over the in-built screeners in Contact Profiler:

1. Support for responses on mobile devices
2. Much more flexible and “sexier” survey formatting
3. More question types
4. More powerful flow control
5. Data piping and other advanced features
6. Scripting

Screeners must work with other parts of a project’s workflow in Contact Profiler. Of particular importance is the analysis performed at the end of a screener to determine whether a respondent “passes” the screener rules and is therefore suitable to participate in the project.

Screener pass rules must be run by Contact Profiler to determine if a respondent is suitable for a project. An externally managed screening process through Web Survey Creator must integrate with this rule system.

The Contact Profiler Workflow

The basic Contact Profiler workflow remains the same, regardless of whether screeners are managed internally or externally. The basic steps in the workflow for a project using screeners always begins as follows:

1. Load people from the panel that are as close to our target audience as possible (based on age, gender and other profile attributes)
2. Invite these people to a Web-based screener survey
3. Based on responses to the screener, either “fail” them or move them into a new respondent type for people who have passed the screener
4. Continue with the project for the people who have passed the screener

Any changes to how the screener is run will only affect step 2. All other steps need to be run as normal in Contact Profiler.

How WSC fits in the standard Workflow

A number of aspects on the Contact Profiler workflow *require a Contact Profiler screener to exist*. For example, the rules for whether a respondent passes or fails are based upon screener questions.

So how can Web Survey Creator take over screening duties from the internal screener?

The answer is actually quite simple - an internal screener is generated automatically from the Web Survey Creator survey with the key questions that can then be used in screener pass rules.

There are a couple of extra steps, but they are all automatically handled by the integration (highlighted in **bold**):

| Screening workflow | SCREENING Workflow |
|-------------------------------------|---|
| USING CP only | USING CP + WSC |
| | Create Screener in WSC |
| Create Screener in CP | Generate Screening in CP from WSC Survey |
| Invite Respondents to Screener | Invite Respondents to Screener |
| | WSC passes responses back to CP |
| Screener Pass/Fail Determined in CP | Screener Pass/Fail Determined in CP |

In essence, the Contact Profiler workflow works exactly the same from Contact Profiler’s perspective, regardless of how the screener is presented to respondents. This has been done on purpose - it means none of the power of Contact Profiler (like fully scripted pass rules) is lost when WSC-based screeners are used.

It truly is the “best of both worlds”.

Screener Integration: Step-by-Step

OK, so let’s have a look at an example screener integration process by considering an example:

“Beach Burger” has decided they want to target a specific demographic for one of their surveys, focus groups and taste tests. They want to pre-screen these people to ensure they meet the following criteria:

- Female
- Aged 18 - 39
- Has eaten at Beach Burger in the last month

There is only one way to get people who have eaten at Beach Burger in the last month - *we need to ask people in a screener.*

Creating the Screener in WSC

Our first step is to create a survey in WSC. This survey needs to include questions to confirm a person’s gender and age (just to double check that the profile data is correct) and ask when the respondent has last eaten Beach Burger.

The screener includes the following questions:

When did the Respondent last eat?

This is the question that will determine whether a respondent has eaten at Beach Burger in the last month. If they have, they will be a valid respondent and therefore will pass the screener (assuming they also meet gender and age requirements). This question has been given the access code *LASTEATEN*.

a b This Question has an access code of **LASTEATEN**

When was the last time you visited one of our stores?

In the last month

In the last couple of months

In the last 6 months

More than 6 months ago

What is the Respondent's Gender?

A simple gender question with an access code of *GENDER* is asked to confirm that the respondents are female.

a b This Question has an access code of **GENDER**

What is your gender?

Male

Female

How old is the Respondent?

The possible age of the respondent is broken down into a number of age ranges. To pass the screener, respondents will need to be in the 18-39 year old age range. This question has the access code *AGE*.

a b This Question has an access code of **AGE**

How old are you?

Under 18

18 - 39

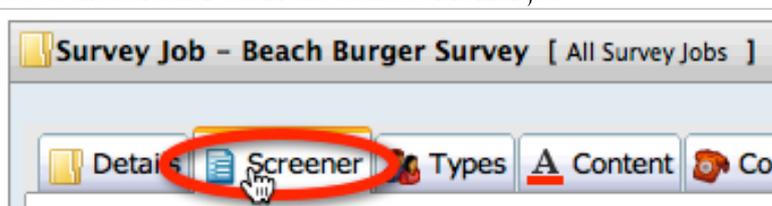
40 - 59

60 or older

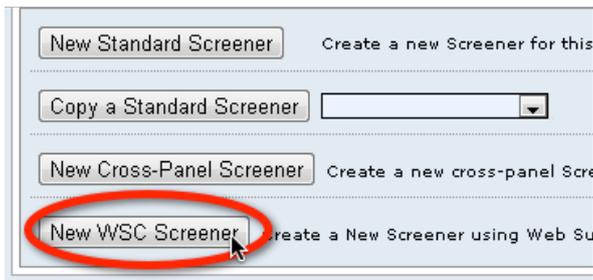
Linking the Screener to Contact Profiler

The steps for linking a Web Survey created in WSC to Contact Profiler as a screener are as follows:

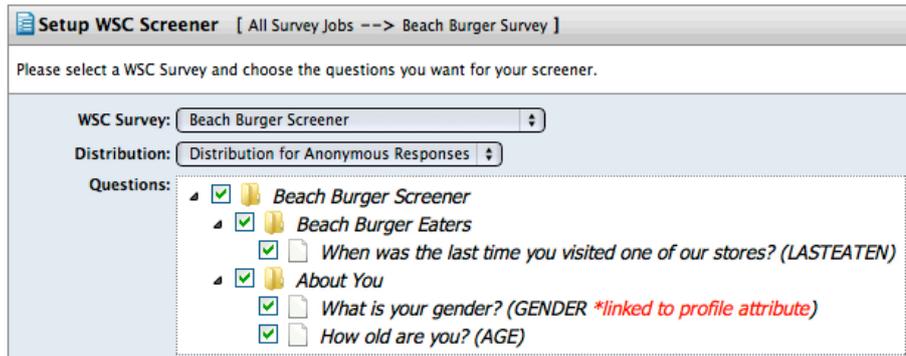
1. Go to the Screener tab in the Contact Profiler job



2. Click the **New WSC Screener** button



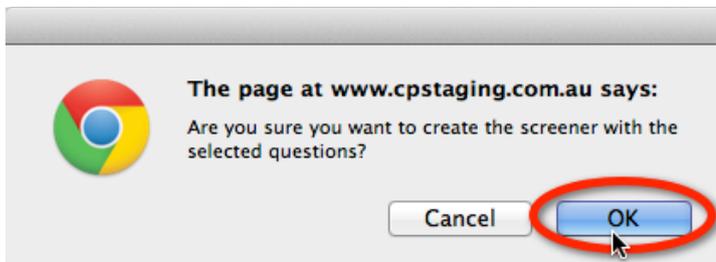
3. Choose the Survey, distribution and questions you want to include in the Screener



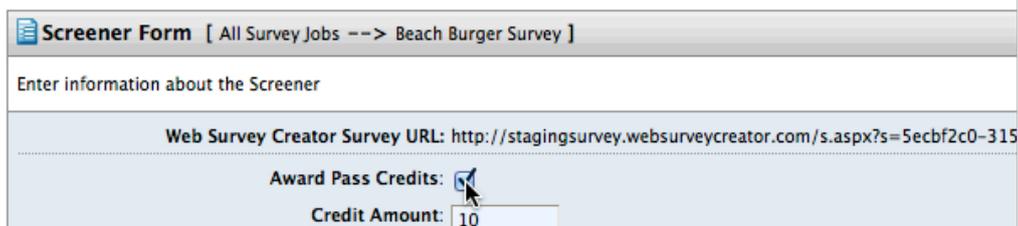
4. Click the **Create** button



The system will confirm you want to create the screener. Click the **OK** button



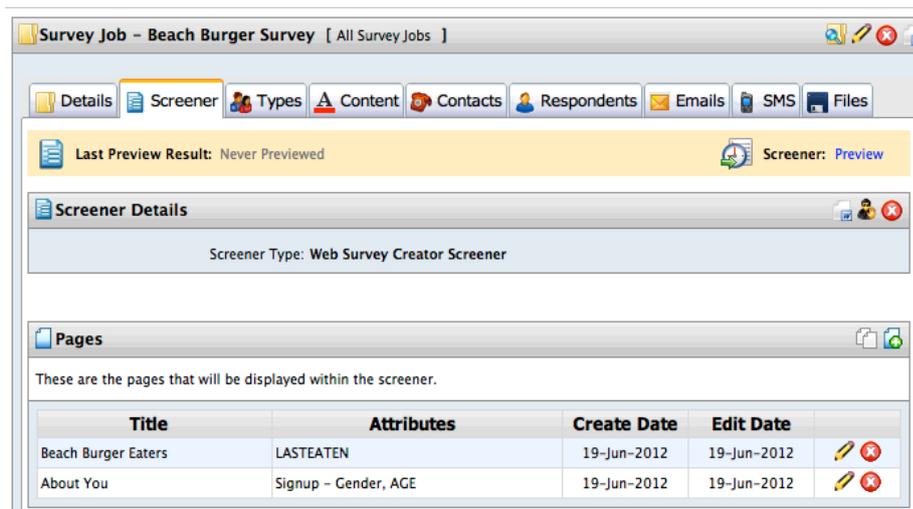
5. Further details for the screener must then be entered for the Screener, such as credits to receive for completing a survey. The WSC Survey URL is clearly visible on this screen for reference.



6. Once all the details have been entered, click the **Save** button



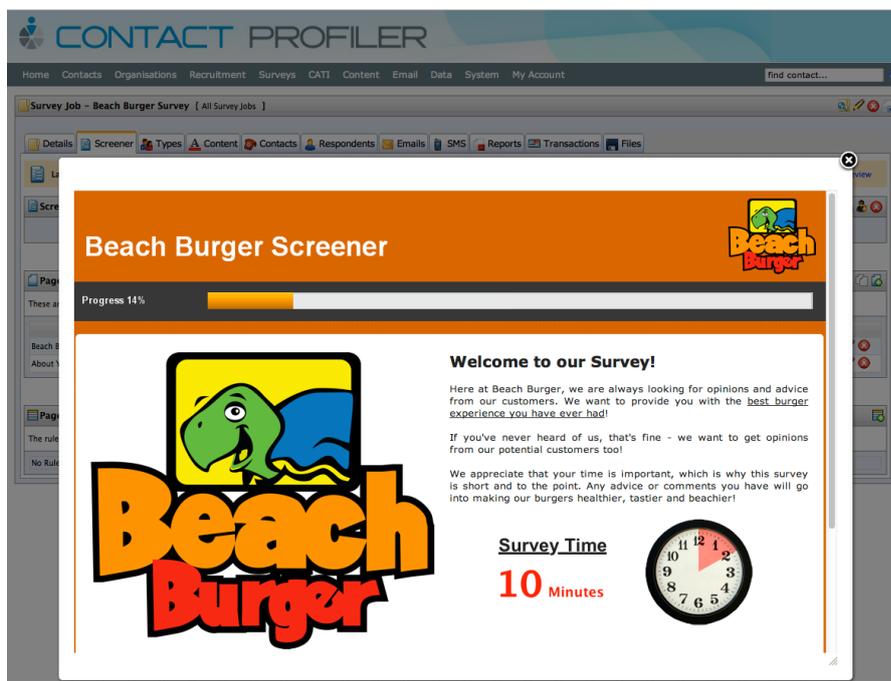
The screener is automatically generated from the WSC survey, and has the same appearance and capabilities as a standard Contact Profiler screener.



The screener can be tested by clicking the **Preview** link.



The screener is shown in a dialog, ready to be completed



Upon completion, the result of the screener will be shown - allowing easy testing of the screener pass/fail rules.

Details Screener Types Content Contacts Respondents Email

Last Preview Result: **Passed** and moved to Respondent Type: **People who Eat At Beach Burger**

Product Testing

Product testing comes in many forms. In this chapter we will look at one example of product testing where we consider a series of car brands, and then ask specific questions about them.

This example brings together multiple advanced concepts, including page looping, data piping, flow control and choice linking.



The Problem with Product Testing

Product testing can be a powerful way of finding out information about a large number of related products in a single survey.

One of the biggest issues with setting up such a survey *is* the large number of products. Let's consider an example:

I want to product test 20 products. For each product I want 4 pages with 2 questions per page. So, what do I need to set up?

Pages: $20 \times 4 = 80$ pages **Questions:** $20 \times 4 \times 2 = 160$ questions

We can see from the example above that it doesn't take long before the setup becomes unwieldy - and it only gets worse if there is complex logic to be included as well.

Using Surveys to do Product Tests

When you create a survey for product tests, there are a number of standard processes you need to go through to set the survey up. These are briefly discussed in this section.

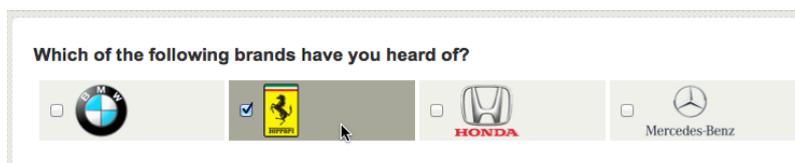
Note that a more detailed explanation of these processes - using the Web Survey Creator product - is the topic of the next section.

Base list of Products

A base list of the products we want to test will need to exist in our survey.

For our example, we will be using car brands as our "products". This "list" will be a question with each of the possible car brands as answers.

It is common for our base list to include a lot more information than simply a piece of text. For example, images can be used for brands:



Which of the following brands have you heard of?

Questions for Each Product

Once you have determined that someone knows a brand, you can start asking additional questions relating to that brand. In our case, we are trying to get an overall opinion of a brand, together with specific views on products within the brand's range of cars.

Our questions will include:

1. What is your overall opinion of the brand?
2. Would you recommend this brand to your friends?
3. Have you ever owned a car from this brand?

4. Which of the following models have you owned?
5. How would you rate the car(s) you have owned from this brand?

We would want to ask these questions for each of the brands, and we would like to customize them by brand as well. How can all this be done? Through the use of advanced survey functionality!

Advanced Survey Functionality

All survey tools will allow you to ask a simple set of questions. Product testing, however, requires something much more powerful. We need:

- To be able to ask the same questions for each of the products
- To be able to refer to product-specific details - such as the product name - when we ask the questions
- To deal with advanced capabilities - like flow control - on a product-by-product basis

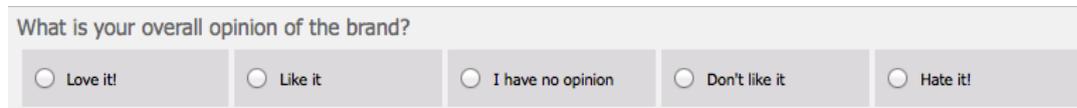
All of these things require advanced functionality as described below.

Page Looping

Let's consider the first question we want to ask:

What is your overall opinion of the brand?

We clearly need to ask this question for each of our brands. This question would be on it's own page.



What is your overall opinion of the brand?

Love it! Like it I have no opinion Don't like it Hate it!

This page would need to be “Looped” for each brand. “Looping” has two effects:

1. There will be a page for each brand asking this question
2. If someone does not chose a brand, the page relating to that brand would be automatically hidden

Flow Control

Flow Control refers to the flow of the survey. More specifically, it refers to the hiding of pages (and therefore questions) that are not needed for a particular survey.

The flow of pages that are looped for a product test will automatically be hidden when page loops are set up - but what about pages *within* the loop?

Let's consider an example. We have three questions in our list of questions as follows:

1. Have you ever owned a car from this brand?
2. Which of the following models have you owned?
3. How would you rate the car(s) you have owned from this brand?

If a respondent has never owned a car from a particular brand, there is no point rating the cars owned (since there won't be any!)

Flow control can be used to ensure invalid pages are not shown to a respondent.

Data Piping

All the questions we have are very generic. Data piping allows you to pipe answers from earlier in the survey into later survey content. For example, rather than:

What is your overall opinion of the brand?

we could have:

What is your overall opinion of BMW?

This would of course only appear in the BMW loop - the appropriate brand would be used in each of the loops. A more advanced use of data piping is the listing of models to choose from. Without data piping, the model question would have to be a generic question with a text answer.

Enter a list of models you have you owned from BMW

There is little we can do with a text list, and statistical analysis would be average at best. We will see in the next section that with data piping, we can pipe actual car models into this question, so it would look more like:

Which of the following BWM models have you owned?

- 1 Series
- 3 Series
- 5 Series
- 7 Series

Choice Linking

Choice linking refers to showing a list of choices in a survey based upon a previous list.

In our example, the best use of choice linking would be to refer to the appropriate models for the question:

How would you rate the car(s) you have owned from this brand?

We could show this as a matrix, with each of the cars owned showing as a row - if I pick two models, for example, the matrix would have two rows.

| | How would you rate the car(s) you have owned from BMW? | | | | | | | | | |
|----------|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | Very Good | | | | | Very Bad | | | | |
| | 10 | 9 | 8 | 7 | 6 | 5 | 4 | 3 | 2 | 1 |
| 1 Series | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3 Series | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Product Testing Example

For the purposes of this section, we will consider an example that shows off all the key elements of a product test without getting too crazy (we'll test 4 brands - not 20!). Everything discussed can be used with real product tests of any size of course.

Our Products

In our example, our “products” will be Car Brands, and within those car brands we will be looking at four models. The car brands and models are listed below:

| BRAND | Models |
|---------------|-------------------------------------|
| BMW | 1 Series 3 Series 5 Series 7 Series |
| Ferrari | 599 458 California F70 |
| Honda | Civic Accord Odyssey NSX |
| Mercedes-Benz | A Class B Class C Class S Class |

Product Questions

For each of the brands and models, we want to ask the following questions:

Page 1

1. What is your overall opinion of the brand?
2. Would you recommend this brand to your friends?
3. Have you ever owned a car from this brand?

Page 2

1. Which of the following models have you owned?

Page 3

1. How would you rate the car(s) you have owned from this brand?

Setting up the Product Test

We know what our products are, what models we have for each product, and what questions we are going to ask. The approach we will take will be as follows:

1. We will set up our list on products in our initial question
2. Three Pages (the **Looping Source** Pages) will be added
3. The **Product Questions** will be added to the pages
4. Flow control will be set up to ensure pages 2 and 3 are hidden for people that haven't owned a car of the particular brand
5. **Choice linking** will be used for the matrix on Page 3
6. We will use **Page Looping** to build all the pages needed to manage the Product Test

7. We will preview our product test!

Creating Our Example

We are going to build our example using Web Survey Creator. We will skip over many of the basics, as these are covered in our basic guide to Creating Web Surveys.

Our Initial Question

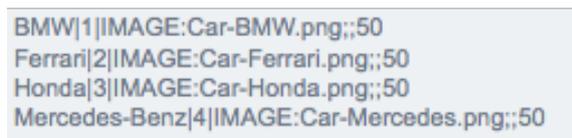
Setting up the initial question is very straightforward - we create a new survey, and then on the first page click **Add Content Here**.



We will add a **Choice Question** with multiple values - since more than one brand can be selected.



When entering our choices, we can take advantage of the quick entry of images by including the image details for each choice:

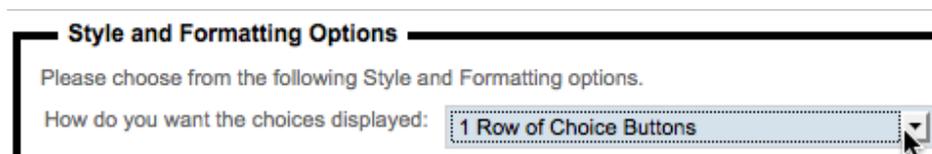


The format of an entry in the choice list is as follows:

Choice Text | Choice Value | IMAGE:abc.png ; width ; height

For our choices, we don't need either a value or an image width. By only entering the image height, we are telling the system to automatically make the width proportional to the height.

Just for looks, we are also going to show the choices on one row, and use 75% width.



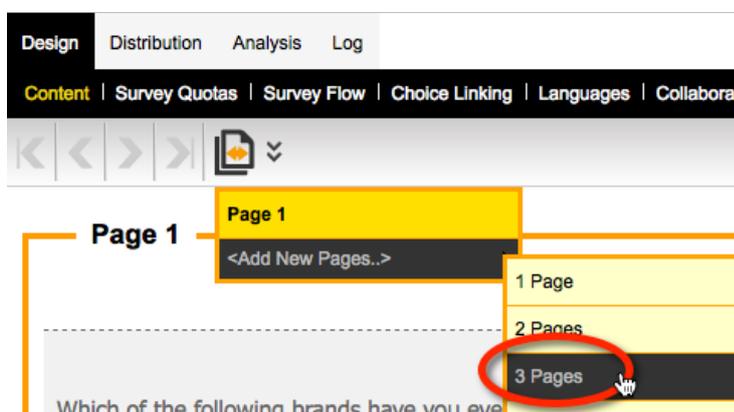
When we add the question, it looks as follows:



Looping Source Pages

A “Looping Source Page” is simply a page that, when we come to creating our page loops, will be used as one of the pages that will be duplicated for each loop.

At this point, these pages are added just like any other page. We can add all three pages in one go from the **Pages** toolbar button.



Product Questions

Our questions about the products need to be added to each of the pages in the order described earlier in this section. Adding questions is a basic procedure covered in our previous manual, so what we want to look at here are the things that are different when creating questions in preparation for our loops.

Data Piping the Brand Name

Our first question is as follows:

What is your overall opinion of the brand?

As we have discussed, we want this to be more specific to the brand we are looking at - for example:

What is your overall opinion of BMW?

This is achieved through **Data Piping**. As with any data piping, we have to start by adding a **Question Access Code** to our product question. We will give this question a code of **CARBRAND**:

Question Access Code (Optional) [Used for Data Piping, SPSS, etc]:

OK, so how do we use this piping? Under normal circumstances, our question would appear as follows:

What is your overall opinion of [@CARBRAND@]?

The question is, will this work? While your first instinct may be that this would be right, you need to consider how we are going to end up using this question - it will be copied 4 times - once for each of the page loops.

Data piping must be thought of differently when it is used on a page that will be copied for page looping. It must show something different for each loop.

A Data Pipe must be used that directly refers to the choice that relates to the current loop. To achieve this you must use the following syntax:

What is your overall opinion of [@CARBRAND:N@]?

When this is copied by creating a page loop, the four pages that will be generated will have the following data pipes:

What is your overall opinion of [@CARBRAND:1@]?

What is your overall opinion of [@CARBRAND:2@]?

What is your overall opinion of [@CARBRAND:3@]?

What is your overall opinion of [@CARBRAND:4@]?

These data pipes will be converted to:

What is your overall opinion of BMW?

What is your overall opinion of Ferrari?

What is your overall opinion of Honda?

What is your overall opinion of Mercedes-Benz?

Data Piping the Models for a Brand

For each brand that is chosen, a list of models needs to be shown. We need to pipe these details into the possible answers for the question:

Which of the following models have you owned?

This raises two questions:

1. Where are the models going to be stored for each of the brands?
2. How are we going to pipe these models into the question about models owned?

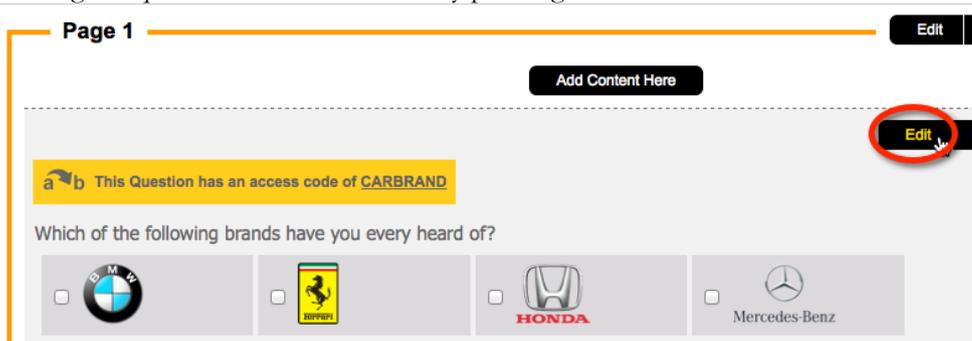
Let's consider the issue of storage of the models first. The answer to storing the models for a brand, and anything else that may be applicable for the brand, is to use **Choice Tags**.

These tags can contain any text data you wish. Tags have a simple structure:

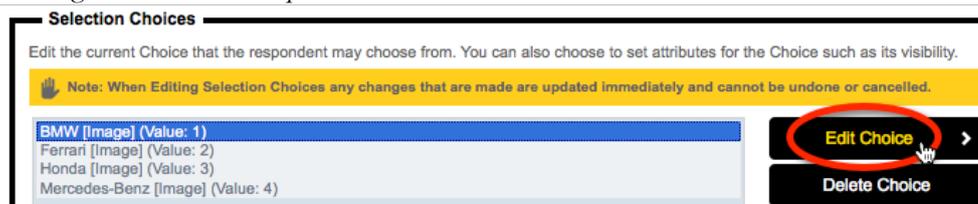
TAGNAME: Value

Setting up tags on choices can be done by:

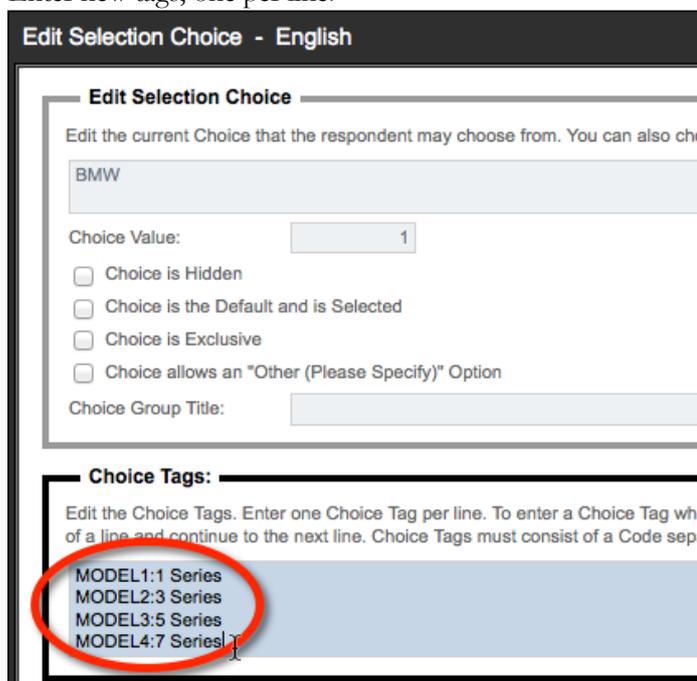
1. Editing the question with our choices by pressing the *Edit button*.



2. Editing a choice for the question.



3. Enter new tags, one per line.



4. Saving the choice, and repeating for the other choices.

Note that tags can be added along with the other choice details when the choices are first added to - using the following format:

```
BMW|1|IMAGE:Car-BMW.png;;50|MODEL1:1 Series|MODEL2:3 Series|MODEL3:5 Series|MODEL4:7 Series
Ferrari|2|IMAGE:Car-Ferrari.png;;50|MODEL1:599|MODEL2:458|MODEL3:California|MODEL4:F70
Honda|3|IMAGE:Car-Honda.png;;50|MODEL1:Civic|MODEL2:Accord|MODEL3:Odyssey|MODEL4:NSX
Mercedes-Benz|4|IMAGE:Car-Mercedes.png;;50|MODEL1:A Class|MODEL2:B Class|MODEL3:C Class|MODEL4:S Class
```

Once we have added all our tags to our choices, they can be used through data piping.

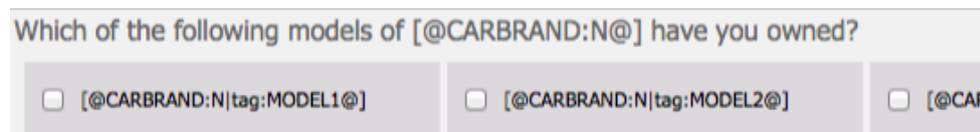
We want to pipe into the values for the question:

Which of the following models have you owned?

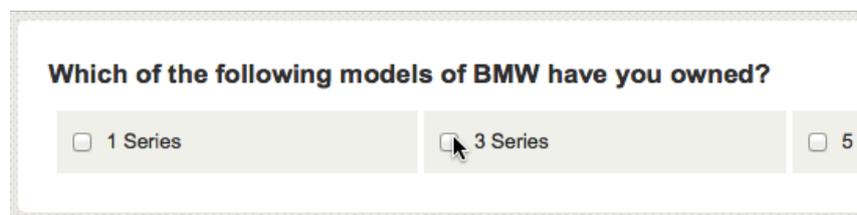
We can do this by setting up the choices in this question as data-piped values:

```
[@CARBRAND:N|tag:MODEL1@]  
[@CARBRAND:N|tag:MODEL2@]  
[@CARBRAND:N|tag:MODEL3@]  
[@CARBRAND:N|tag:MODEL4@]
```

These codes tell the system which choice to use for the data pipe, and the tag to show from that choice. The question would look as follows in the designer:



If a respondent chose BMW, the question would show in the survey as:



Flow Control

Flow control is used to hide pages based on answers in a survey. In our example, we have the following questions:

Page 1

...Have you ever owned a car from this brand?

Page 2

Which of the following models have you owned?

Page 3

How would you rate the car(s) you have owned from this brand?

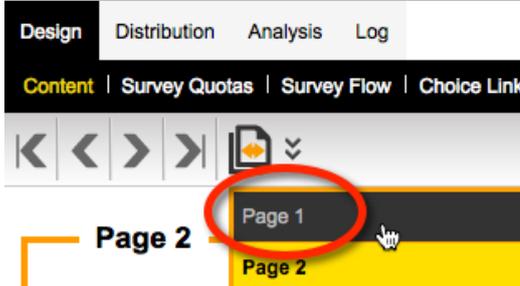
Clearly pages 2 and 3 need to be hidden if the respondent has never owned a car from the brand. Page 3 will also need to be hidden if the respondent owned none of the models listed on page 2.

Before we set up survey flow, there is one piece of “housekeeping” we will do to make the setup of flows easier.

Flow Control and page looping both refer to pages as part of their setup. The time has come to name our pages to make them easier to distinguish.

Renaming pages is simply a matter of editing each page as follows:

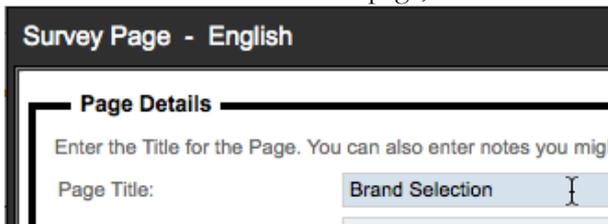
1. We ensure we are on the page we want to name



2. We click the *Edit button* to edit the page details



3. We enter the new name for the page, and save it



4. The new page name will be visible at the top of the page



We will change all our page names as follows:

| | |
|--------|-----------------|
| Page 1 | Brand Selection |
| Page 2 | Brand Opinion |
| Page 3 | Models Owned |
| Page 4 | Model Opinion |

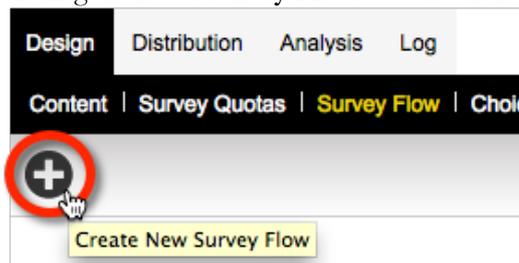
We are now ready to set up our flows. Flow control can all be set from the *Survey Flow* menu in Web Survey Creator.

We can to add each flow by:

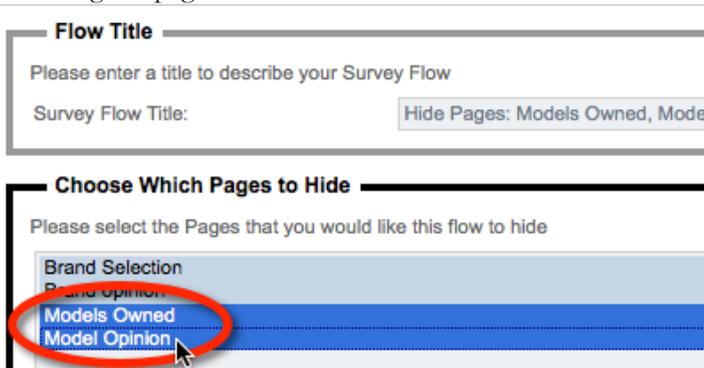
1. Clicking on the **Survey Flow** menu



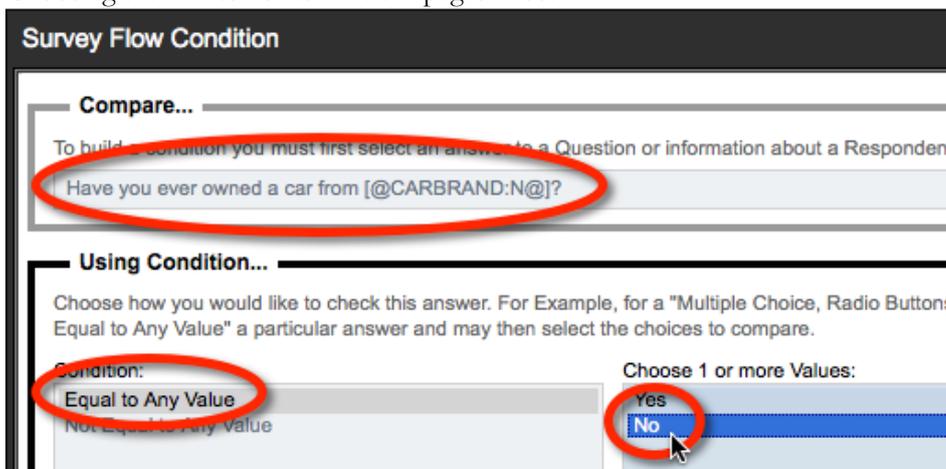
2. Clicking the **New Survey Flow** button on the toolbar



3. Choosing the pages we want to hide for the flow



4. Choosing the rule to use to hide the pages chosen



The flow relating to models can be created in the same way. The rule we would apply for hiding the “Model Opinion” page would be to check if none of the models were selected.

Survey Flow Condition

Compare...

To build a condition you must first select an answer to a Question or information about a Respondent

Which of the following models of [@CARBRAND:N@] have you owned?

Using Condition...

Choose how you would like to check this answer. For Example, for a "Multiple Choice, Radio Buttons (C Equal to Any Value" a particular answer and may then select the choices to compare.

Condition:

- Equal to Any Value
- Not Equal to Any Value**
- Contains all of these values
- Is Exactly these values

Choose 1 or more Values:

- [@CARBRAND:N|tag:MODEL1@]
- [@CARBRAND:N|tag:MODEL2@]
- [@CARBRAND:N|tag:MODEL3@]
- [@CARBRAND:N|tag:MODEL4@]

Choice Linking

Choice linking is used to only display appropriate choices in a question based on choices made earlier in the survey. The best way to understand this is to consider our example.

We have a question about models that can look as follows:

Which of the following models of BMW have you owned?

1 Series 3 Series 5 Series 7 Series

If we answer that we have owned a 1-Series and a 3-Series, it doesn't make sense for the next question to be:

How would you rate the car(s) you have owned from BMW?

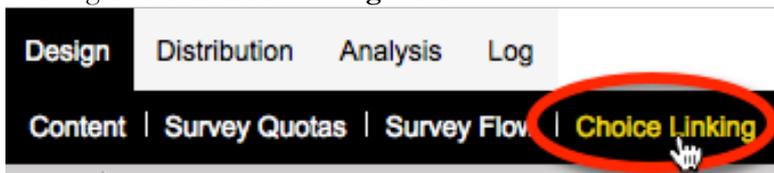
Very Bad 1 2 3 4 5 6 7 8 9 10 Very Good

| | |
|----------|---------------------------------|
| 1 Series | <input type="range" value="3"/> |
| 3 Series | <input type="range" value="5"/> |
| 5 Series | <input type="range" value="1"/> |
| 7 Series | <input type="range" value="1"/> |

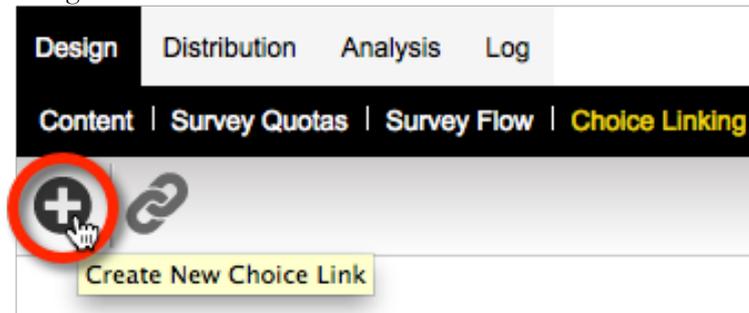
It doesn't make sense to ask about 5-Series and 7-Series models, because I have indicated I have never owned them. This is where **Choice Linking** is used - we only want to show rows in the matrix for the models that have actually been chosen.

We set up choice linking by:

1. Clicking on the **Choice Linking** menu



2. Clicking the **New Choice Link** button



3. Set up the Choice Link

Choose a Target Content Question to be Linked (All Shown)

Shown here are Content Questions which contain Selection Choices or Question Rows. To create a link between choices choose a Target Content Question which you would like to "Link" to a "Choice" in another Content Question. Content Questions such as Choice Questions, Matrix Questions and Ranking Questions all may be selected. Linking a Choice will allow you to automatically control if the Choice or Row will be visible to respondents based on the selection of the linked Choice. NOTE: You cannot link content from the first page so it does not appear.

Brand opinion
What is your overall opinion of [:@CARBRAND:N@]?
Would you recommend [:@CARBRAND:N@] to your friends?
Have you ever owned a car from [:@CARBRAND:N@]?

Models Owned
Which of the following models of [:@CARBRAND:N@] have you owned?

Model Opinion
How would you rate the car(s) you have owned from [:@CARBRAND@]?

Select a Choice Selection from "How would you rate the car(s) you..." to be Linked

Shown here are Choices and Question Rows for the currently selected Content Question. Select a Choice or Question Row to be linked to another Choice in another Content Question.

6
7
8
9
Very Good

Question Rows
[:@CARBRAND:N|tag:MODEL1@]
[:@CARBRAND:N|tag:MODEL2@]
[:@CARBRAND:N|tag:MODEL3@]
[:@CARBRAND:N|tag:MODEL4@]

Choose a Source Content Question to Link to the Selected Question Row

Shown here are Content Questions which contain Selection Choices or Question Rows. Choose a Source Content Question which you would like to link to the currently selected Question Row. Only Content Questions from Pages prior to the Page of the selected Content Question are shown.

Brand Selection
CARBRAND - Which of the following brands have you every heard of?

Brand opinion
What is your overall opinion of [:@CARBRAND:N@]?
Would you recommend [:@CARBRAND:N@] to your friends?
Have you ever owned a car from [:@CARBRAND:N@]?

Models Owned
Which of the following models of [:@CARBRAND:N@] have you owned?

Choose a Target Choice from "Which of the following models of..." to Link to

Select one or more Choices from this Content Question to Link to

Choice: [:@CARBRAND:N|tag:MODEL1@]
[:@CARBRAND:N|tag:MODEL2@]
[:@CARBRAND:N|tag:MODEL3@]
[:@CARBRAND:N|tag:MODEL4@]

Choose when the selected Question Row will be shown

You can choose when the selected Question Row will be shown based on the selection state of the Linked Question Choice. For example, You might only want to show the Question Row if the Linked Question Choice was selected. In this case choose "Show When Selected"

Show When Selected
 Show When NOT Selected

[Save New Choice Link](#)

4. Accept the assistance to complete choice links for other choices

The Source and Target selections you have made appear to be related or at least have the same number of options and you have selected the first option in each selection. Would you like to add all the options for the LINKED CHOICES as Choice Links?

Click OK to Add all combinations of CHOICES OR Cancel to only add the single selection.

We now have a four-page survey with all the content we need to create our Page Loops.

Building the Page Loops

Setting up Page Loops is all about preparation. Everything we have done so far in this section provides an indication of the sort of preparation that is necessary.

Setting up of Page Loops themselves is always the last thing you should do in your design. Page Looping is effectively a massive copy operation, so anything you have

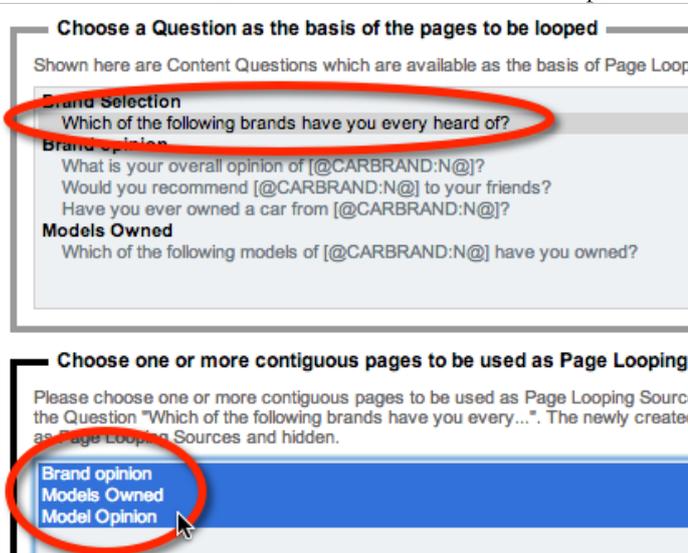
missed prior to building the loops will be missed in every single loop.
Check and double check your work!

Building Page Loops is a very straightforward process. To build them we:

1. Click on the **Page Loop** toolbar button and choose **Create Page Loop** from the drop-down menu



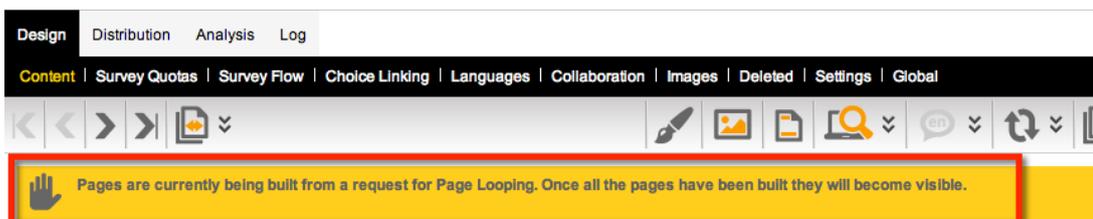
2. Choose the **Brand Question** as the basis for the loop, and the three brand pages for looping



3. Click the **Create New Page Loop** button



4. We will be returned immediately to the **Design** tab - the looped pages will be created in the background. A warning message will show indicating that the looped pages are not yet created.



5. Once the process is completed, the warning will disappear, and we will be left with our looped pages in our design

| Select Page |
|---|
| Brand Selection |
| Brand opinion [Loop Source, Hidden] |
| Models Owned [Loop Source, Hidden] |
| Model Opinion [Loop Source, Hidden] |
| Brand opinion (BMW) [Loop Result] |
| Models Owned (BMW) [Loop Result] |
| Model Opinion (BMW) [Loop Result] |
| Brand opinion (Ferrari) [Loop Result] |
| Models Owned (Ferrari) [Loop Result] |
| Model Opinion (Ferrari) [Loop Result] |
| Brand opinion (Honda) [Loop Result] |
| Models Owned (Honda) [Loop Result] |
| Model Opinion (Honda) [Loop Result] |
| Brand opinion (Mercedes-Benz) [Loop Result] |
| Models Owned (Mercedes-Benz) [Loop Result] |
| Model Opinion (Mercedes-Benz) [Loop Result] |
| <Add New Pages..> |

Page Looping - What just happened?!

It is important to understand exactly what happens when we use page looping. Let's consider what happened to the four pages we had in our "pre-looped" survey.

Brand Selection Page



This page remained exactly as it was - it was not looped itself. Other pages were looped based on what the brand question on this page had as choices.

Original Opinion Pages

| |
|-------------------------------------|
| Brand Opinion [Loop Source, Hidden] |
| Models Owned [Loop Source, Hidden] |
| Model Opinion [Loop Source, Hidden] |

Our original pages are still in the survey. They formed the basis of all the looped pages. They are exactly like they always were, except:

- They are now flagged as "Looped Source" pages
- They are now hidden

These pages will never be shown to a respondent. They are kept in the survey mainly as a backup - if you ever need to delete your looped pages, and recreate them, you will want to recreate them from these original pages.

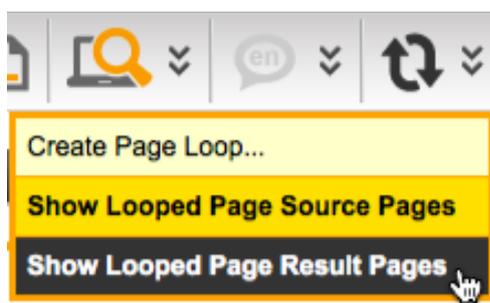
Looped Opinion Pages

| | |
|---------------------------------------|---|
| Brand Opinion (BMW) [Loop Result] | Brand Opinion (Honda) [Loop Result] |
| Models Owned (BMW) [Loop Result] | Models Owned (Honda) [Loop Result] |
| Model Opinion (BMW) [Loop Result] | Model Opinion (Honda) [Loop Result] |
| Brand Opinion (Ferrari) [Loop Result] | Brand Opinion (Mercedes-Benz) [Loop Result] |
| Models Owned (Ferrari) [Loop Result] | Models Owned (Mercedes-Benz) [Loop Result] |
| Model Opinion (Ferrari) [Loop Result] | Model Opinion (Mercedes-Benz) [Loop Result] |

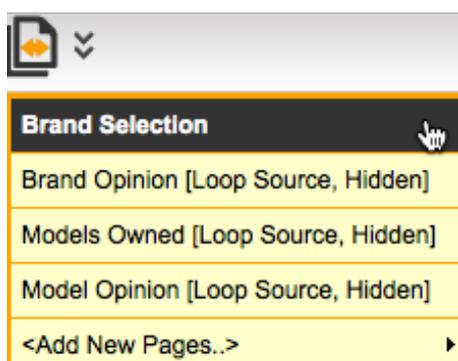
These are the pages that have been created for each of the choices in the source question. They use the original name of the page as part of the page name (another good reason we named these pages properly) together with the value of each of the choices that the pages have been copied for.

What do I do with all these pages?

It's not hard to see that the number of pages shown in a survey can grow very quickly if page loops based on a large number of choices are set up. This can get unwieldy very quickly. Fortunately you can turn Loop Source Pages and Loop Result Pages off very easily from the **Page Loop** toolbar button.



If we turned off Page Loop Result Pages, our list of pages looks very familiar to the pre-looping design.



Note that you cannot do certain functions, like Page merging or moving, unless all pages are shown.

Page Looping DOs and DON'Ts

DO ensure you have set up all flows, piping and choice linking in the pages that will be included in the loop

DON'T modify loop result pages unless you have a specific reason for doing so. Any changes will **ONLY** be made on that one specific page

DON'T add or remove looped pages in a piecemeal fashion if you can avoid it.

DO delete all loop result pages and rebuild the entire page loop if there are changes to the source question (assuming there are no responses)

Conjoint Analysis

Conjoint analysis is a statistical technique used in market research to determine how people value different features that make up an individual product or service.

Web Survey Creator has a specific Conjoint Analysis question type to allow this sort of analysis to be conducted.



What is Conjoint Analysis?

Conjoint analysis – sometimes known as “Trade Off Analysis” - is a very powerful quantitative market research method. It can be used to measure preferences for product features.

Rather than directly ask survey respondents what they prefer in a product, or what attributes they find most important, conjoint analysis employs the more realistic context of respondents evaluating potential product profiles. Each profile includes multiple conjoined product features (hence, conjoint analysis). An example could look as follows:

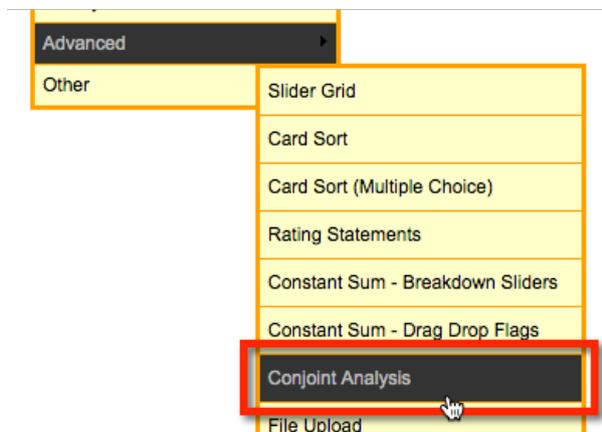
Tasks, Concepts and Features

In order to understand how to use Conjoint Analysis within Web Survey Creator, it is important to the definitions of each element that makes up a conjoint analysis question.

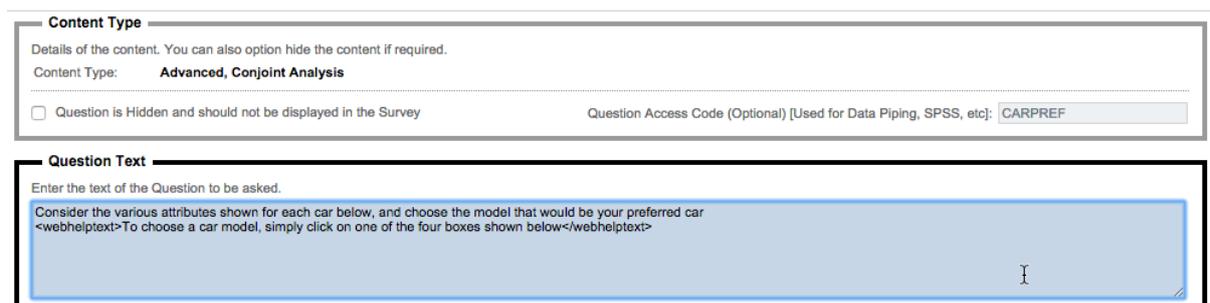
Respondents will complete a between 12 to 30 conjoint questions. By independently varying the features that are shown to the respondents and observing the responses to the product profiles, the analyst can statistically deduce what product features are most desired and which attributes have the most impact on choice. In contrast to simpler survey research methods that directly ask respondents what they prefer or the importance of each attribute, these preferences are derived from these relatively realistic trade-off situations.

Creating a Conjoint Analysis Question

Adding a Conjoint Analysis Question to a survey is similar to adding any other question type – you simply press the **Add Content** button in the survey designer.



The basic information for the question – the unique code and question text – is similar to any other question. Since the question text will remain at the top of the screen while each task is shown, it is recommended that the question text explains how to complete the question.

A screenshot of the configuration interface for a Conjoint Analysis question. It consists of two main sections: 'Content Type' and 'Question Text'. The 'Content Type' section has a title bar, a description 'Details of the content. You can also option hide the content if required.', and a 'Content Type:' field with the value 'Advanced, Conjoint Analysis'. Below this is a checkbox for 'Question is Hidden and should not be displayed in the Survey' and a 'Question Access Code (Optional) [Used for Data Piping, SPSS, etc:]' field with the value 'CARPREF'. The 'Question Text' section has a title bar and a description 'Enter the text of the Question to be asked.'. Below this is a large text area containing the question text: 'Consider the various attributes shown for each car below, and choose the model that would be your preferred car <webhelptext>To choose a car model, simply click on one of the four boxes shown below</webhelptext>'. A cursor is visible in the text area.

Adding “Features”

Features are the individual elements – such as color or price – that can vary between each Concept. Up to 5 features can be defined in the question. In our example, we will perform an analysis on different types of cars. The distinguishing features for these cars will be:

1. Body Type
2. Color
3. Price

Each feature will have two parts to it – a code, and a description. The code is used to refer to the feature within the WSC Designer, while the description will be how the feature is described to a survey respondent that completes the question.

Once a valid feature has been entered, the **Feature Items** field is shown to allow the different values for the feature to be entered.

Features
Enter the list of Features to be used for this Conjoint Analysis. Enter one Feature per line. No f
of Item

BODY:Body Type

Feature Items
Enter Feature Items for these Features. Each Feature Item must be on a separate li
followed by Tag. Each part must be separated by a | (pipe) symbol. For example, B

1. Body Type [BODY]

Once we have entered all our features, the features will look as follows:

Features
Enter the list of Features to be use
of Item

BODY:Body Type
COLOR:Color
PRICE:Price

If the values for each feature are simply pieces of text, the feature items can look as follows:

Feature Items

Enter Feature Items for these Features. Each Feature followed by Tags. Each part must be separated by

1. Body Type [BODY]

Sedan
Station Wagon
Van

2. Color [COLOR]

Red
White
Black

3. Price [PRICE]

\$20,000
\$21,000
\$22,000

While showing just the text description of each feature item is often sufficient, they can contain much more information than simply the text of the item.

Using Images for Feature Items

If we want to be able to optionally use an image, images can be added as a tag to each feature item.

1. Body Type [BODY]

Sedan|IMAGE:VehicleSedan.png
Station Wagon|IMAGE:VehicleWagon.png
Van|IMAGE:VehicleVan.png

2. Color [COLOR]

Red|IMAGE:ColorRed.png
White|IMAGE:ColorWhite.png
Black|IMAGE:ColorBlack.png

Adding other Data to Feature Items

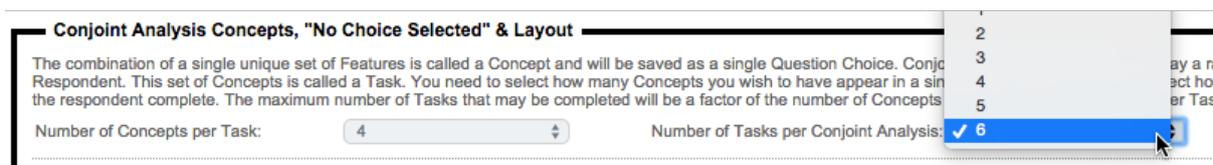
Any number of additional tags can be added onto a feature item, and will be available for use when setting up the question. For example:

1. Body Type [BODY]

Sedan|IMAGE:VehicleSedan.png|BODYDESCR:Four door sedan
Station Wagon|IMAGE:VehicleWagon.png|BODYDESCR:Four door wagon
Van|IMAGE:VehicleVan.png|BODYDESCR:Van with 6+ seats

The description of the vehicle body - "BODYDESCR" - will be useable by using the symbol **#bodydescr#** in the question. Note that every tag needs to be unique - you can not use a tag "DESCR" for both body types and colors, for example.

As mentioned earlier in this chapter, a respondent will loop through a number of “tasks” and each task will show between 2 – 4 “concepts” to choose from. The number of concepts per task, and total tasks, can be set on the question.

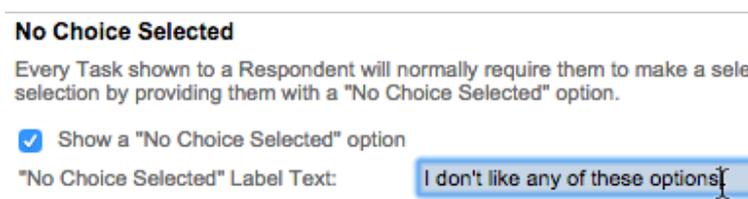


The number of tasks that can be chosen will be limited based on how many combinations of features there are. In our example, the number of combinations is:

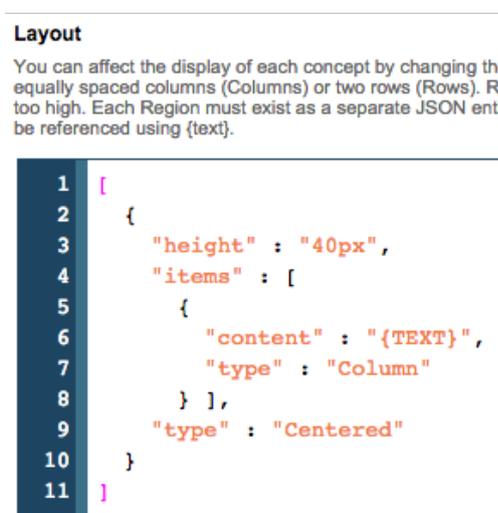
3 body types x 3 colors x 3 prices = 27 combinations

If 4 concepts were going to be shown per task, the maximum number of tasks would be 6 before some of the concepts would have to be repeated.

There is an option to have a “none of these” choice shown so that a respondent can indicate when they don’t like any of the options given.



The layout of each concept box is very flexible, but to start with the formatting can be left as the default.



See the later section “Concept Box Formatting” for more specific details on what formatting options are available.

The last details that need to be added are some instruction text, and an indication of whether this question is mandatory. If the question is not mandatory, a respondent can skip over the question, or only answer some of the tasks, and still continue to the next part of the survey.

All Tasks Completed

Text to display to a respondent upon completion of all tasks

All tasks have been completed. Press Next to continue.

Mobile Display Instructions

When a Conjoint Analysis question is displayed on a mobile device some changes to the rendering take place to take into account the limited device instructions are provided to explain to respondents the need to "swipe" through a list of concepts and then choose from the list of concepts

You can swipe through each list of concepts and can then choose your preferred concept at the end...

Mandatory Options

Question is Mandatory and must be completed

You can choose if the Question must be completed before the respondent may continue the survey.

Once all the question details have been entered, the question will be shown in the designer.

Warning: Question is Mandatory and must be completed for respondents to move forward

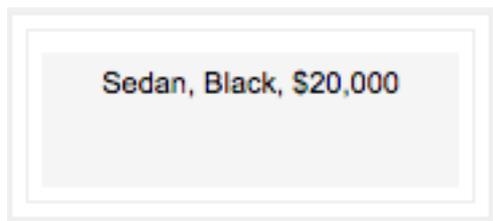
Warning: This Question has an access code of CARPREF

Consider the various attributes shown for each car below, and choose the model that would be your preferred car
To choose a car model, simply click on one of the four boxes shown below

| | | | | |
|---------------------------------|------------------------|-----------------------------------|----------------------|-----------------------------------|
| Station Wagon, Red, \$21,000 | Sedan, Black, \$20,000 | Station Wagon, Black, \$20,000 | Van, Black, \$20,000 | I don't like any of these options |
|---------------------------------|------------------------|-----------------------------------|----------------------|-----------------------------------|

Concept Box Formatting

The default look of a concept box is the simplest possible design that just shows the text for each of the feature items that make up the concept:

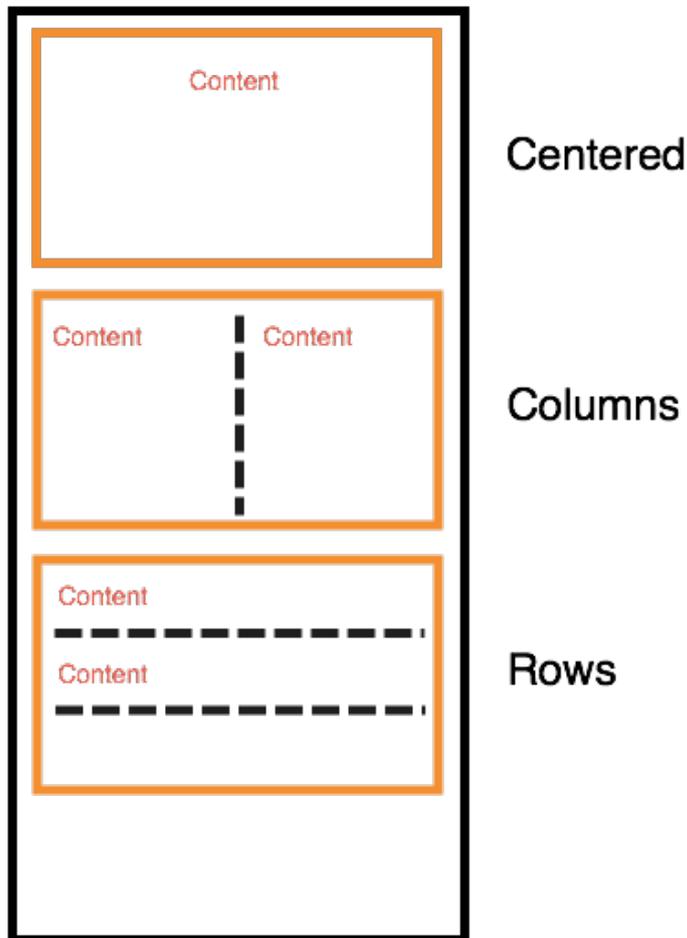


There are a number of things that can be done to improve the look of a concept box, including:

1. The use of images
2. The use of different layouts within the box – centered, rows or columns
3. The use of formatting tags for colors, bold, italic etc.

Layout Formats

There are three layout formats that can be chosen from for each individual section within the Concept Box.



Title and Subtitle

A title and subtitle can also be optionally added above the formatted sections in the concept box. They can contain text, and be set to a particular height (to avoid height variations due to text wrapping). Below is an example of a variation on our original layout, with a header and footer.

The numbers indicate the line number in the layout script that creates the piece of content, or sets its height.

```

1  [
2    {
3      "height" : "150px",
4      "title" : "#body# at #price#",
5      "titleHeight" : "40px",
6      "subtitle" : "#bodydescr#",
7      "subtitleHeight" : "25px",
8
9      "items" : [
10     {
11       "content" : "{TEXT}",
12       "type" : "Column"
13     } ],
14     "type" : "Centered"
15   }
16 ]

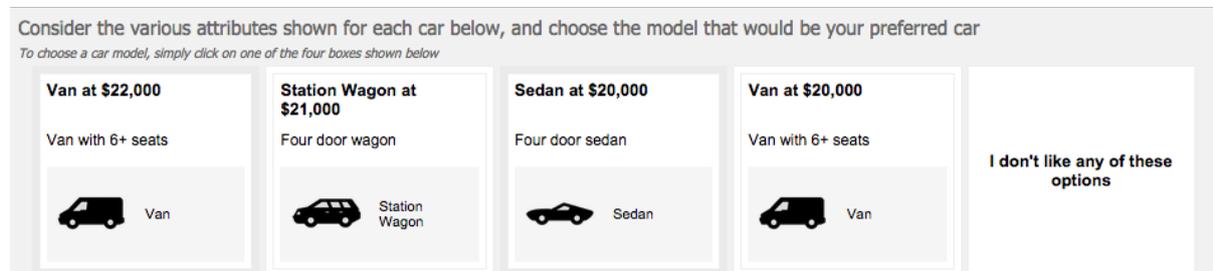
```

The diagram shows a concept box layout with the following elements and callouts:

- 3:** Points to the entire layout structure.
- 4:** Points to the title "Station Wagon at \$22,000".
- 5:** Points to the subtitle "Four door wagon".
- 6:** Points to the subtitle "Four door sedan".
- 7:** Points to the subtitle "Station Wagon, Black, \$22,000".
- 11:** Points to the subtitle "Sedan, Red, \$22,000".

Finalizing the Layout

The final layout can be any mixture of layout blocks and content. In our example we have mentioned the key details in the title and subtitle, but we need to finalize the content of the block beneath the titles. Our final layout looks as follows:



This is achieved with the following layout:

```
1  [
2    {
3      "height" : "65px",
4      "title" : "#body# at #price#",
5      "titleHeight" : "40px",
6      "subtitle" : "#bodydescr#",
7      "subtitleHeight" : "25px",
8
9      "items" : [
10     {
11       "content" : "#image#",
12       "type" : "Image"
13     },
14     {
15       "content" : "#body#",
16       "type" : "Column"
17     }
18   ],
19   "type" : "Columns"
20 }
21 ]
```

Exporting Conjoint Data

There is a substantial amount of data to export for Conjoint Analysis because:

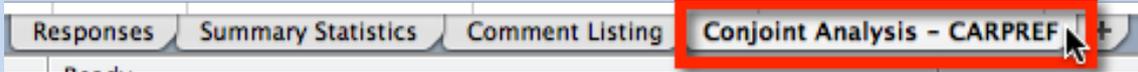
1. There are multiple responses per respondent
2. We need to know both what options were shown, and which option was selected

It is for these reasons that WSC exports Conjoint data only through the Excel export, and it uses a new tab to show the exported data for a single conjoint analysis question.

A Conjoint Analysis question will only be exported to Excel if the question has an Access Code set up.

Question Access Code (Optional) [Used for Data Piping, SPSS, etc]:

The code will be used in the tab name in Excel that contains the conjoint data



Formatting of Data

An example of how a conjoint analysis question appears in Excel can be seen here:

| | A | B | C | D | E | F | G |
|----|----------------------|-----------|----------------------|----------------------|----------------------|------------------------|------------------------|
| 1 | Come-back-Later Code | Iteration | Sedan, Red, \$20,000 | Sedan, Red, \$21,000 | Sedan, Red, \$22,000 | Sedan, White, \$20,000 | Sedan, White, \$21,000 |
| 2 | 2T8DKYZMU7 | 1 | | | | | |
| 3 | 2T8DKYZMU7 | 2 | | | | | |
| 4 | 2T8DKYZMU7 | 3 | | | | | |
| 5 | 2T8DKYZMU7 | 4 | | | 0 | | |
| 6 | 2T8DKYZMU7 | 5 | 0 | | | | |
| 7 | 2T8DKYZMU7 | 6 | | | | 0 | |
| 8 | 325P9324BE | 1 | 1 | | | | |
| 9 | 325P9324BE | 2 | | | 0 | | |
| 10 | 325P9324BE | 3 | | | | | |
| 11 | 325P9324BE | 4 | | | | | |
| 12 | 325P9324BE | 5 | | 0 | | | |
| 13 | 325P9324BE | 6 | | | | | |
| 14 | NSXD593XWB | 1 | | 0 | 1 | | 0 |
| 15 | NSXD593XWB | 2 | 0 | | | | |
| 16 | NSXD593XWB | 3 | | | | 0 | |
| 17 | NSXD593XWB | 4 | | | | | |
| 18 | NSXD593XWB | 5 | | | | | |
| 19 | NSXD593XWB | 6 | | | | | |

The data for a conjoint analysis question is as follows:

1. The “Come-back-later” code matches the unique code for each response in the export under the **Responses** spreadsheet tab
2. The “Iteration” shows a task count for each response
3. Each concept is shown in a single column in the spreadsheet
4. If a particular concept is seen but not chosen, a zero (0) will be shown in the column
5. If a particular concept is seen, and is chosen, a one (1) will be shown in the column

360 Degree Feedback Surveys

A 360 Degree Feedback Survey is a specialized type of survey for evaluating individuals. Other names often used to describe 360 Degree Feedback are multi-source feedback, multi-rater feedback, multi-rater assessment, full-circle appraisal, upward feedback, and peer evaluation.



What are 360 Degree Feedback Surveys?

360 Degree Feedback Surveys vs. Standard Surveys

What makes a 360 Degree Feedback survey different to a standard survey? The answer lies in who responds to these surveys, and why they respond.

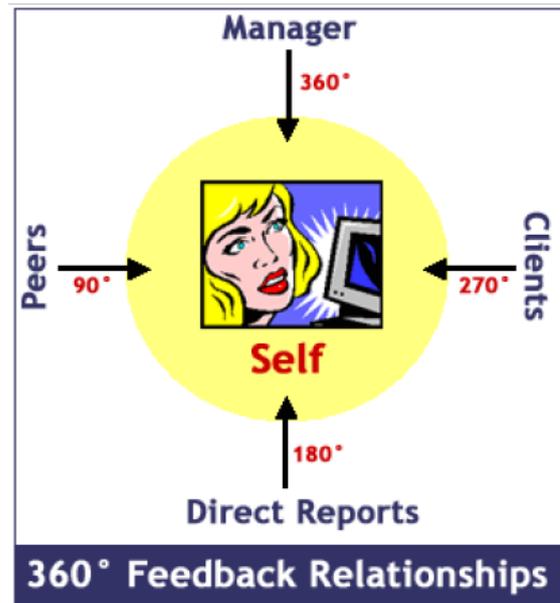
For a normal survey, there is generally one response added by each respondent. This response relates directly to the respondent - how they feel about something (e.g. employee satisfaction surveys), what they think can be improved (e.g. customer surveys) or perhaps their own general comments on a particular topic.

A 360 Degree Feedback survey is specifically used to evaluate individuals' performance from a number of different points-of-view.

Respondents may enter multiple responses, with each response relating to a different review subject.

A respondent can evaluate his or her own performance (self-review) or someone else's performance (third party review). This process results in feedback on a person's performance from multiple sources (i.e. Feedback from 360 degrees). Reports can be produced that compare each subject's rating of themselves with that of their peers, managers, subordinates and other third parties.

This type of survey can produce quality data that can lead to improved feedback, better staff development and improvement of customer service.



Subjects and Third Parties

There are usually two people involved in any response to a 360-degree feedback survey - the person being reviewed and the reviewer.

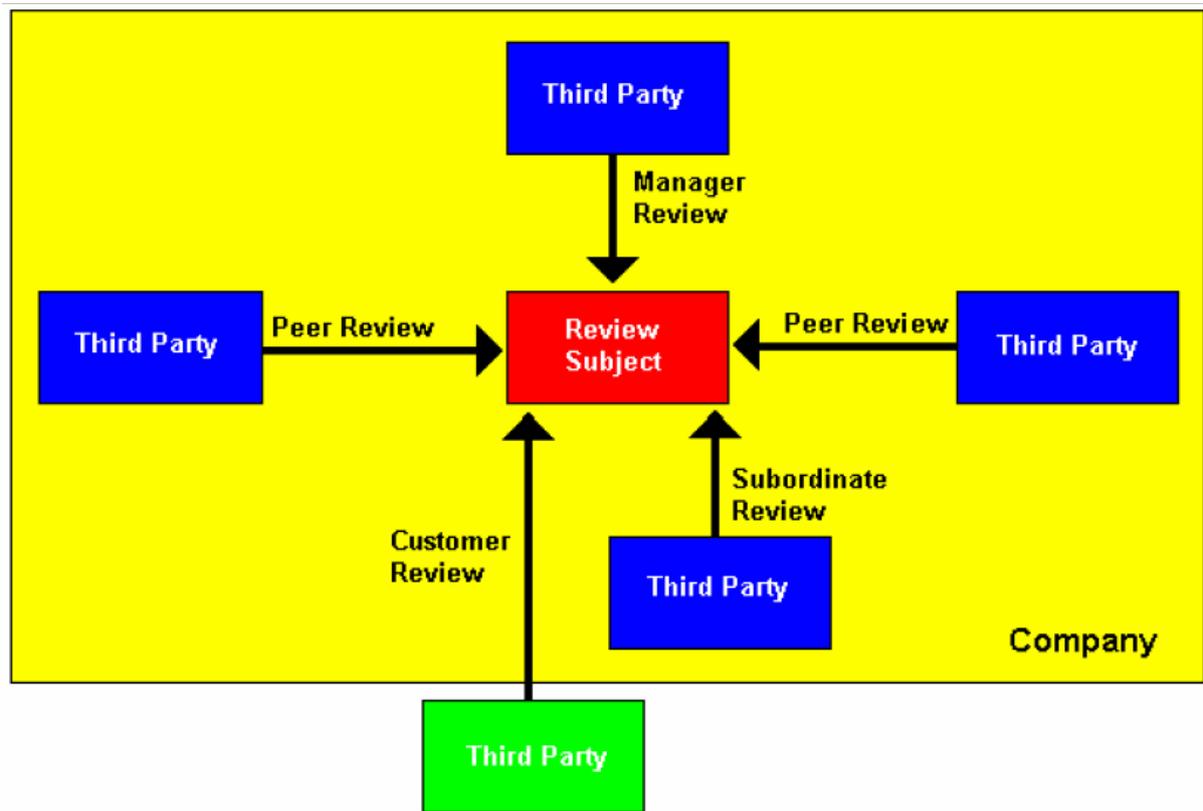
| | |
|--------------------|---|
| Subject | The "Subject" is the person being reviewed. Reports will be produced for each subject involved in the process. |
| Third Party | Third Parties are the people (apart from the subject themselves) who are reviewing the subject. They may be peers, managers, subordinates or some other group of people (such as customers of the company). |

A maximum of one self-review is allowed per subject, but any number of third parties may review the subject. Before any reviews can be entered for a particular subject, relationships must be established between the subject and third parties. A person can be both a subject (i.e. they are being reviewed) and a third party for one or more other subjects.

Each relationship will be of a certain type, such as "Peer", "Subordinate" or "Manager". The development of appropriate relationship types is an important part of the design process when developing a 360 degree feedback survey.

360 Degree Feedback Relationships - An Example

Here we see an example of relationships that may be set up in a 360-degree feedback survey:



The review subject is shown in the middle. There are a number of third parties that can review the subject - a manager, two peers, a subordinate and a customer. These relationships can be defined within a 360-degree survey project and five third-party reviews may be entered.

As can be seen from this example, third parties do not necessarily have to be from the same company. The customer is an external third party who nevertheless is in a good position to provide valuable feedback on the subject's performance.

What should a 360 Degree Feedback Survey Contain?

Unlike standard surveys, which may contain literally anything, as a general rule 360-degree feedback surveys deal with particular aspects of a review subject's performance. Specific areas that are usually covered by such surveys include:

| | |
|------------|---|
| Knowledge | Knowledge Familiarity with one's job, industry and company. |
| Skills | Task proficiency and efficiency. |
| Behaviours | Energy and optimism. Outlook and general attitude. |

A 360 degree feedback survey should not target things such as personality traits or styles.

The goal of these surveys is to provide a positive vehicle to improve a person's knowledge of their own development needs, and provide them with feedback on how they are perceived within an organisation. The goal is not to criticize or demean people, or bully them into changing their ways.

Benefits of 360 Degree Feedback

Using 360-degree feedback surveys can benefit all parties involved in the process. Some of the key benefits to stakeholders in the 360-degree feedback process are as follows:

Benefits for the Individual

1. Process helps individuals understand how others perceive them
2. Personal development needs are revealed
3. Feedback is essential for learning
4. Individuals can better manage their own careers and performance

Benefits to the Team

1. Increases communication between team members
2. Supports teamwork by involving team members in the development process

Benefits to the Company

1. Better career development for employees
2. Promote from within
3. Improves customer service by having customers contribute to the training
4. Drives Training

360 Degree Feedback vs. Performance Appraisals

While 360-degree feedback and performance appraisals can complement each other, they should not be linked.

If 360 is linked to compensation decisions, it loses its power as a development tool. When compensation is the outcome, individuals will quickly learn how to play the game - "I'll scratch your back, if you scratch mine." Further, if people do not get satisfactory ratings, morale can decrease when 360 is linked to performance appraisal mode, but low scores when 360 is used purely for development tend to be viewed as constructive feedback.

Designing a 360 Degree Feedback survey is similar in many ways to designing a normal survey.

Subject and Third Party Survey Forms

As discussed in the previous Page, there are two types of respondents to 360-degree feedback surveys - subjects and third parties. There are differences between the survey forms that should be shown to each of these respondent types.

Let's consider a simple example - differences in question text. Below are examples of question text that could appear in the survey form for subjects and third parties:

| | |
|-------------------------|--|
| Subject Text | Do you believe you are an excellent manager of other people? |
| Third Party Text | Do you believe Jake Smith is an excellent manager of people? |

As we can see from this example, the text that is shown in the survey differs depending upon whether the respondent is talking about himself or herself or another person.

There are two key aspects to creating this text in a survey:

1. Question text, and text content can be flagged as only to be shown for a review subject or a third party using special tags
2. Specific 360 data piping symbols can be used for review subject and third party details

To show the text above, the following would be entered in question text:

```
<selfreview>Do you believe you are an excellent manager of other  
people?</selfreview><thirdpartyreview>Do you believe [@SUBJECTFIRSTNAME@]  
[@SUBJECTLASTNAME@] is an excellent manager of people?</thirdpartyreview>
```

360 Degree Survey Design Tips

Before jumping in to create your 360-degree survey, there are a number of design tips that should be considered.

Ratings Questions

Single selection value range questions (or matrix questions) are the best questions to use for ratings questions. The 360° Analysis Report will only report on this type of question, because other types cannot be compared in the relation to the “gap” between the subject’s answers and the third parties’ answers.

Good ratings MUST use the highest score. For example, if a value range question is set up as “Values, First Highest”, make sure the first value is “Strongly Agree” rather than “Strongly Disagree”.

Comments

Comments questions can be used to support ratings questions. A small number of comments questions allowing a respondent to elaborate on their ratings will provide the most informative results.

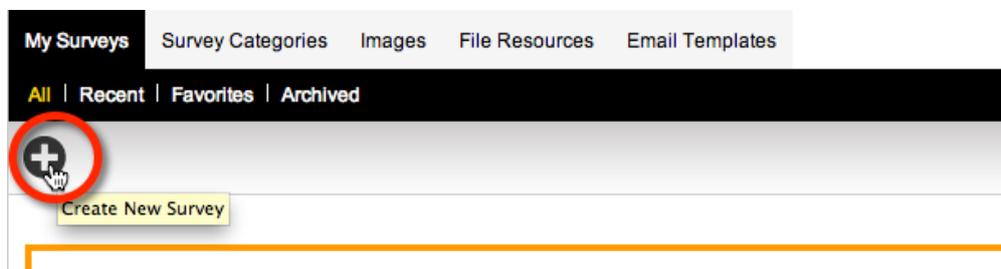
Pages

Where possible, separate questions that will be answered by a particular type of respondent into different pages. For example, questions on how well a person manages people should be separated so that people

reviewing managers can be asked the questions, whereas people who are reviewing junior employees with no management responsibilities will not be asked the questions.

Creating a 360 Degree Feedback Survey

To create a new survey, we press the **Plus** button on the **My Surveys** Tab.



We are going to build the survey from scratch, we're going to call it **Sample 360 Degree Management Survey** and we will place this survey in the **General** category. Theme and language can remain at the default settings.

WSC will treat a survey as a 360 Degree Feedback Survey if you choose **360° Feedback Responses** as the Survey Responses Type. Note that once selected, this choice can not be changed later - 360° surveys and non-360° surveys can not be changed to each other after survey creation.

When we save our survey details, we are immediately taken into the **Content Designer** for the survey.

Adding pages is exactly the same as adding pages for a standard survey. We will start by adding a page that tells the respondent what they are completing. We will call this page “Survey Introduction”.

Survey Page - English

Page Details

Enter the Title for the Page. You can also enter notes you might like to keep about the Page.

Page Title:

Internal Page Notes:

Adding our Introductory Text

We can add introductory text by pressing the **Add Content Here** button, and then choosing **Simple Text Content** from the **Survey Content** menu.

Add Content Here

- Text Question
- Choice Question
- Matrix Question
- Number Question
- Date Question
- Ranking Question
- Demographic Question
- Survey Content**
- Advanced
 - Image
- Other
 - Simple Text Content (Instructions, Messages, etc)**
 - YouTube video

The text we add has a couple of key elements:

1

2

3

```

<h2>Survey Instructions</h2>
In this survey, you are <selfreview><strong>assessing yourself</strong></selfreview><thirdpartyreview><strong>assessing [ @SUBJECTFIRSTNAME@ ] [ @SUBJECTLASTNAME@ ]</strong></thirdpartyreview>. Please complete this assessment as objectively as possible.

In order to gain an accurate profile, please answer the questions in terms of your actual feelings/behaviours.

Please be as accurate as you can. Your overall profile will be derived both from your responses to this questionnaire, and the combined responses of your superiors/supervisors and peers, who will be asked to complete a similar questionnaire. You will receive feedback on your profile obtained from the completion of this questionnaire. Your responses to this questionnaire will also be combined with the responses of others and used for research purposes.

Please use the NEXT button when moving to the next section, the BACK button to return to the previous section and the SUBMIT button to submit your completed questionnaire.
  
```

1. We are using an “H2” tag to show the first line of text as a heading.
2. We are using the <selfreview> and <thirdpartyreview> tags to show different content for subjects and third parties.
3. We are using respondent data piping to show the name of the person the respondent is reviewing

The resultant text will look different for subjects and third parties (reviewers) as follows:

Review Subject Text

Survey Instructions

In this survey, you are **assessing yourself**. Please complete this assessment as objectively as possible.

In order to gain an accurate profile, please answer the questions in terms of your actual feelings/behaviours.

Please be as accurate as you can. Your overall profile will be derived both from your responses to this questionnaire, and the combined responses of your superiors/supervisors and peers, who will be asked to complete a similar questionnaire. You will receive feedback on your profile obtained from the completion of this questionnaire. Your responses to this questionnaire will also be combined with the responses of others and used for research purposes.

Please use the NEXT button when moving to the next section, the BACK button to return to the previous section and the SUBMIT button to submit your completed questionnaire.

Third Party Text

Survey Instructions

In this survey, you are **assessing Chuck Allred**. Please complete this assessment as objectively as possible.

In order to gain an accurate profile, please answer the questions in terms of your actual feelings/behaviours.

Please be as accurate as you can. Your overall profile will be derived both from your responses to this questionnaire, and the combined responses of your superiors/supervisors and peers, who will be asked to complete a similar questionnaire. You will receive feedback on your profile obtained from the completion of this questionnaire. Your responses to this questionnaire will also be combined with the responses of others and used for research purposes.

Please use the NEXT button when moving to the next section, the BACK button to return to the previous section and the SUBMIT button to submit your completed questionnaire.

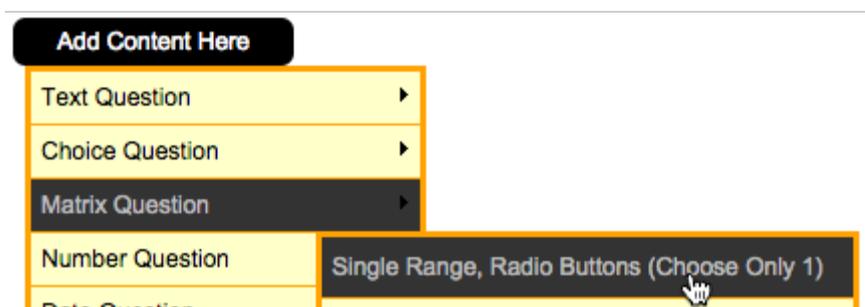
Adding Rating Statements

The most common way to set up a 360 Degree Feedback Survey is to have rating statements grouped together in a matrix. These questions generally relate to a single competency. For example:

Productivity

1. I am always willing to seek out new techniques to improve my productivity
2. I confront problems early, before they get out of hand
3. Etc...

We would add this to the survey as a standard single selection matrix.



The question will need an Access Code so it can be referred to in reporting.

Question Access Code (Optional) [Used for Data Piping, SPSS, etc]:

The “Question Text” for the matrix will appear above the list of statements, so it will explain what is being rated. We can enter different text depending upon who is completing the survey.

Question Text

Enter the text of the Question to be asked.

<selfreview>Your Productivity</selfreview><thirdpartyreview>Productivity of [@SUBJECTFIRSTNAME@] [@SUBJECTLASTNAME@]</thirdpartyreview>

The choices in the matrix would reflect each of the possible ratings that could be given for the question.

Selection Choices

Enter the choices that the respondent may choose from next line.

Agree Strongly
Agree
Agree Slightly
Disagree Slightly
Disagree
Disagree Strongly

Ordering of Choices and their Values

It is very important to ensure that the best score is associated with the highest rating statement. If this is not done, reporting will not make any sense. You therefore need to ensure that “Agree Strongly” = 6, regardless of whether it is the first or the last value in the list.

In our example, Agree Strongly is the **first value in the list**, so the scoring needs to be set to **Values, First Highest**.

How do you want the choices sorted:

Automatic Value Setting Method:

Allow Comments for All Choices

No Values
Values, First Lowest (1, 2, 3, ...)
 Values, First Highest (3, 2, 1 ...)

Each of the statements would be set up as rows in the question. The rows need to contain the correct text for both the review subject and reviewers.

Question Rows

Enter the questions that the respondent will answer. Enter one question per line. To next line.

I am always willing to seek out new techniques to improve my productivity
I confront problems early, before they get out of hand
I am effective in establishing objectives
I put a top priority on getting results
I arrange the flow of work to allow the most effective handling of assignments
I use sound logic in solving problems

The question will look exactly like any other matrix question in a survey.

Your Productivity

| | Agree Strongly | Agree | Agree Slightly | Disagree Slightly | Disagree | Disagree Strongly |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I am always willing to seek out new techniques to improve my productivity | <input type="radio"/> |
| I confront problems early, before they get out of hand | <input type="radio"/> |
| I am effective in establishing objectives | <input type="radio"/> |
| I put a top priority on getting results | <input type="radio"/> |
| I arrange the flow of work to allow the most effective handling of assignments | <input type="radio"/> |
| I use sound logic in solving problems | <input type="radio"/> |

Adding Comments

Comments can be an important way to explain why a person has been rated in a particular way. The most common approach is to have a single set of comments for each competency. Adding a multi-line text question under our matrix question is all we need to do to achieve this result.

| | |
|-----------------|---|
| Text Question | |
| Choice Question | Single Line Text |
| Matrix Question | Multiple Lines of Text (Comments, Notes, etc) |
| Number Question | |

The question would look as follows:

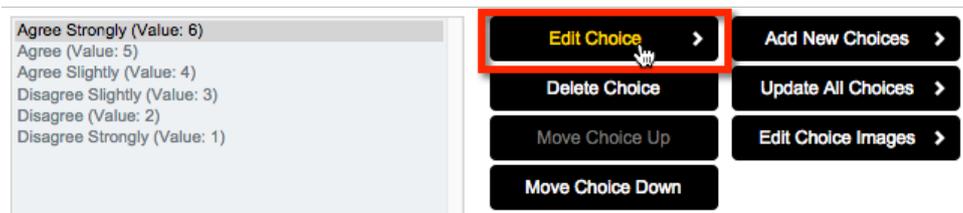
Please add any comments you have with regards to the scores you have given for productivity

I

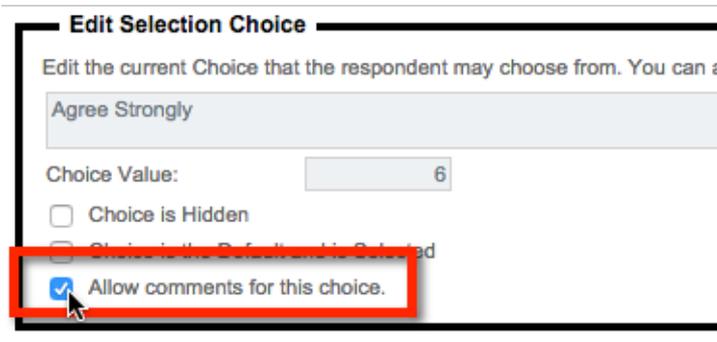
Adding Comments for every statement

There may be situations when a general comment for an entire competency is not specific enough. In these situations, individual comments for each statement would be more appropriate. This can be achieved by adding comment entry directly to the matrix. To do this:

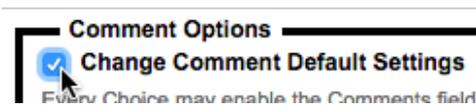
1. Edit the matrix question
2. Edit a choice



3. Click on **Allow comments for this choice**



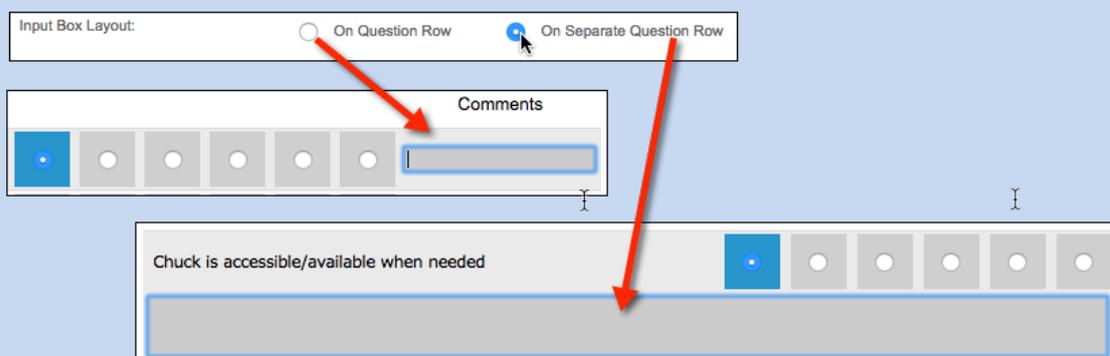
4. Repeat step 3 for every choice you wish to add comments to
5. Change default comment settings if needed



Things to consider when showing comments on a matrix question

Activating comments on a choice by-choice basis on a matrix has been done so that you can choose when comments are applicable. For example, you may decide to only allow comments to be entered for people that pick the highest and lowest scores.

The style of comment is also an important consideration. The two options are having comments on the same line as the statements, or having them on a new line.



Completing Your Survey Design

Completion of the 360-degree feedback survey is the same as completing any survey – simply add the content you need. The following things should be considered, however:

1. For ratings, single selection choice, single-selection rating matrix and slider matrix questions must be used. No other question types can be reported on for ratings.
2. Single- and multi-line text questions can be used for comments, together with comments text on single-selection matrix questions.
3. Any other question type can be included in the survey if you wish to collect extra data, but this will not be available in the 360 reports.

Relationship Types

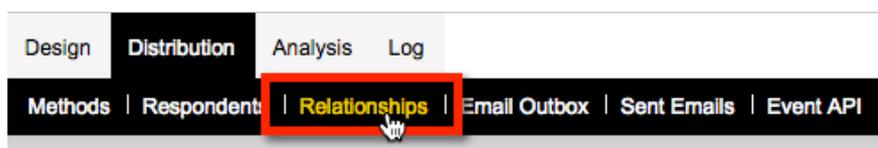
As we have previously discussed, the entire 360-feedback process revolves around relationships between people. It is therefore very important for the system to understand what relationship types you want to track.

Whenever a new 360 degree feedback survey is created, a number of standard relationships are automatically created that will cover most situations:

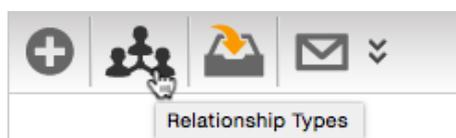
- Self Review
- Direct Report
- Manager
- Peer

These relationships can be added to, removed, or changed. To manage relationship types:

1. Click on the **Relationships** sub menu under the **Distribution** tab.



2. Click on **Relationship Types** on the toolbar



3. From the browse:
 - a. Add relationship types by clicking on the **Add Relationship Type** toolbar button
 - b. Edit relationship types by clicking on the relationship name
 - c. Delete relationship types by checking their check box and clicking the **Delete** button

| Title | Code | Display Title | Is Self Review |
|---------------|---------|---------------|----------------|
| Direct Report | DIRECT | Direct Report | False |
| Manager | MANAGER | Manager | False |

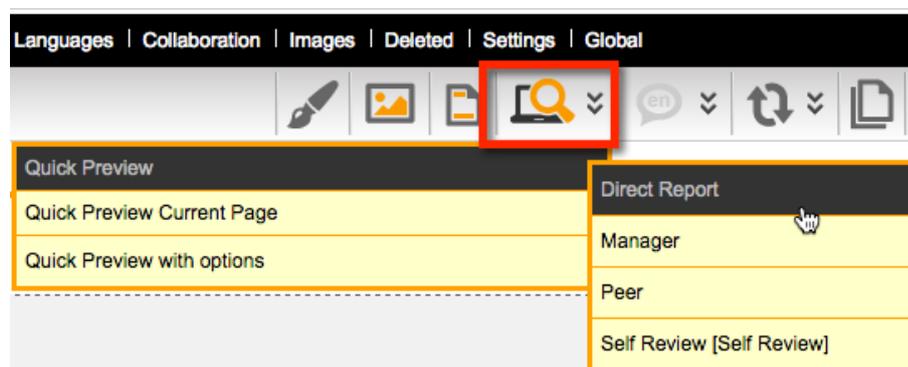
Previewing the Survey

To see how the survey looks, we can preview it by selecting the **Quick Preview** option. There are two different views that can be chosen from:

1. How the survey will look to the review subject
2. How the survey will look to reviewers

In addition, there may be differences based on the relationship of the person doing the review – managers, for example, may see different pages to direct reports (through the use of flow control to hide pages based upon relationship).

The preview will therefore allow you to pick exactly which relationship type you want to view the survey form as:

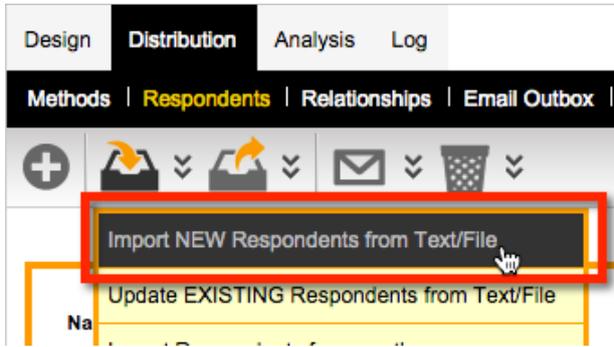


Setting up a “Fully Managed” 360 Process

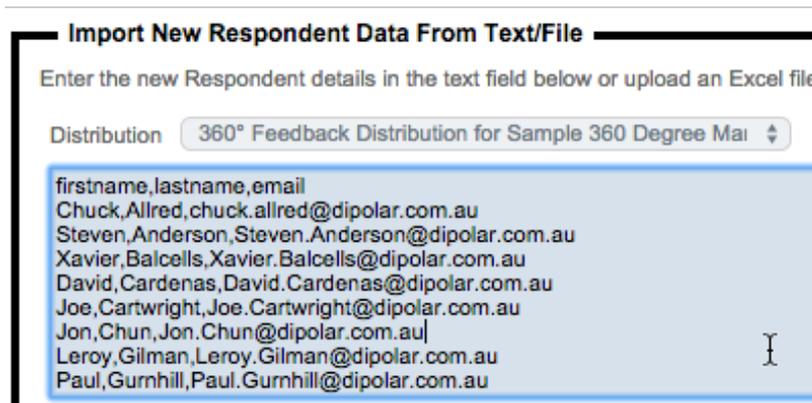
Running a fully managed process means that the administrator controls every aspect of the process. In particular, it means that the relationships between people will be set up for them.

Importing Respondents

Importing respondents is very similar to importing respondents for any survey, and is performed as usual from the **Import Respondents** toolbar button.



The only difference for 360-degree feedback surveys and normal respondent based surveys is that 360 surveys **require respondents to have an Email address**. The Email address is used to send invitations, and is also the unique identifier for people that is used when importing relationships.

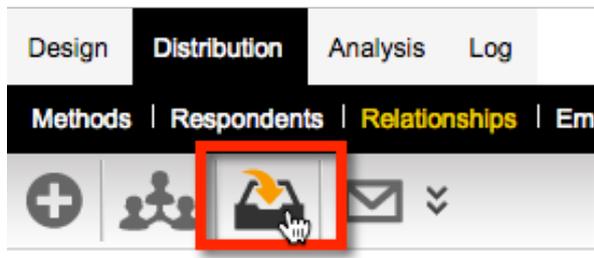


Importing Relationships

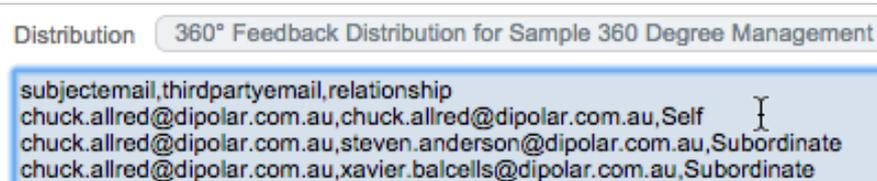
When relationships are imported, they will link people to each other with the appropriate relationship type. The fields that can be included in a relationship import are as follows:

| | |
|-----------------|---|
| subjectemail | The email address of the person being reviewed |
| thirdpartyemail | The email address of the reviewer |
| relationship | The unique code for the relationship |
| status | Must be set to “live”, “hidden” or “closed”. <i>This column is optional – if not entered, a status of live will be used.</i> |
| batch | Used to group a set of relationships together. For example, if the same survey will be run quarterly, batches could be called “2015Q1”, “2015Q2” etc. Only one batch can be live at a time. <i>This column is optional – if not entered the batch will be set to “default”.</i> |
| deadlinedate | The date the review must be completed by. This must be entered in the format YYYY-MM-DD. <i>This column is optional – if not entered there will not be a deadline.</i> |

Relationships are imported by pressing the **Import Relationships** toolbar button under the **Relationships** sub-menu.



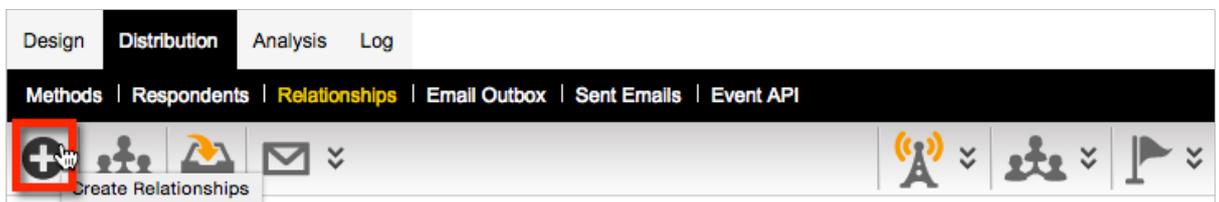
Relationships can either be pasted in, or imported in Excel.



Manually Creating Relationships

WSC makes it easy to manually create relationships quickly through the **Create Relationships** window. To open this window:

1. Click on the **Relationships** sub-menu under the **Distribution** tab
2. Click the **Create Relationships** toolbar button



The **Create Relationships** window has a number of features as shown below.

In this window, you can:

1. Toggle between creating self-review relationships and third party relationships
2. Search the list of respondents that can be chosen as third parties or review subjects
3. Choose one or more
4. Choose one or more respondents that will be the third parties (reviewers) – using shift and control keys to select multiples
5. Choose a relationship to create with the review subjects(s)
6. Choose one or more respondents that will be the review subjects (people being reviewed) – using shift and control keys to select multiples
7. Set the status, batch code and deadline date for every relationship you add
8. Click the **Save New Relationship(s)** button to create the relationships chosen.

The relationship system will intelligently add the relationships you choose. Specifically:

1. It will not add relationships that already exist
2. It will not add relationships that make no sense

An example of the second test would be where we want to make multiple people peers of each other.

The system will add the valid peer relationships, but will ignore making a person a peer of himself or herself, since that makes no sense.

| Subject | Third Party | Relationship | Distribution | Status | Batch | Deadline Date | Result |
|--------------|--------------|--------------|------------------|--------|---------|---------------|-----------------|
| Robert Wong | Robert Wong | Peer | 360° Feedback... | Live | DEFAULT | | Cannot use Self |
| Robert Wong | Randy Wright | Peer | 360° Feedback... | Live | DEFAULT | | Success |
| Randy Wright | Robert Wong | Peer | 360° Feedback... | Live | DEFAULT | | Success |
| Randy Wright | Randy Wright | Peer | 360° Feedback... | Live | DEFAULT | | Cannot use Self |

We're Done!

Everything is now set up for a fully managed 360 process. The next steps will simply be:

1. Everyone will be sent an Email inviting them to the process
2. When they click on the link given to them, they will be shown a list of reviews to complete
3. They will complete the reviews one-by-one

This is the simplest workflow for a 360-degree feedback process.

Previewing what a respondent will see

The standard preview in the designer will show you what the survey will look like, and lets you choose a relationship to view. That let's you confirm the form works correctly. To see what an actual respondent will see when they click on their link that is Email to them, however, we need to:

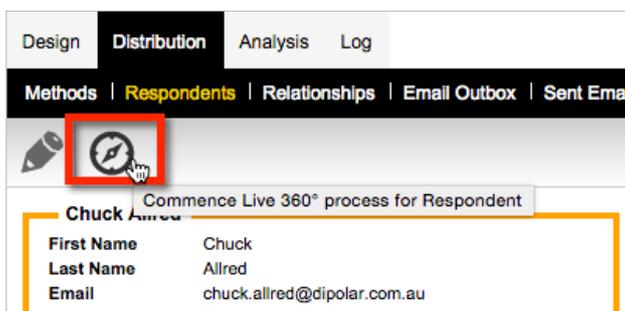
1. Click on the **Respondents** sub-menu under the **Distribution** tab



2. Click on a respondent from the list

| Name | Email Address |
|---------------------------------|--------------------------------|
| Chuck Allred | chuck.allred@dipolar.com.au |
| Steven Anderson | Steven.Anderson@dipolar.com.au |
| Xavier Balcells | Xavier.Balcells@dipolar.com.au |

3. Click on the **Commence Process** toolbar button



- The screen that comes up is the screen that the reviewer will see when they click on their 360 link. Below is an example of what you would see for a basic 360-degree feedback process.

Sample 360 Degree Management Survey

| Subject | Relationship | Last Update Date | Deadline | Status |
|--|--------------|------------------|----------|-----------------------|
| Chuck ALLRED chuck.allred@dipolar.com.au | Self Review | | | Start |
| Steven ANDERSON Steven.Anderson@dipolar.com.au | Manager | | | Start |
| Xavier BALCELLS Xavier.Balcells@dipolar.com.au | Manager | | | Start |
| David CARDENAS David.Cardenas@dipolar.com.au | Manager | | | Start |

When looking at a person's review list, there is one very important rule:

Do **NOT** click the **Start** button to begin a survey. If you do, this will be like the person starting their own responses, and when they go into the site, it will look like they have already been into the response.

| Subject | Relationship | Last Update Date | Deadline | Status |
|--|--------------|--------------------|----------|-----------------------|
| Chuck ALLRED chuck.allred@dipolar.com.au | Self Review | 16-Oct-2014 1:20PM | | Draft |

If a response is added that you need to remove, delete the response by going into the person, and pressing the **Delete Response** pill button.

| Relationships | | | | | | | Change Relationships... | Delete Relationship | Delete Response |
|------------------|---------------|--------------|------------------|------------------|------------|----------|-------------------------|-------------------------------------|-----------------|
| Subject | Third Party | Relationship | Distribution | Status | Batch Code | Deadline | Response Date | <input type="checkbox"/> | |
| Anderson, Steven | Allred, Chuck | Manager | 360° Feedback... | Live (Unstarted) | DEFAULT | | | <input type="checkbox"/> | |
| Balcells, Xavier | Allred, Chuck | Manager | 360° Feedback... | Live (Unstarted) | DEFAULT | | | <input type="checkbox"/> | |
| Cardenas, David | Allred, Chuck | Manager | 360° Feedback... | Live (Unstarted) | DEFAULT | | | <input type="checkbox"/> | |
| Allred, Chuck | Allred, Chuck | Self Review | 360° Feedback... | Live (Draft) | DEFAULT | | 16-Oct-2014 | <input checked="" type="checkbox"/> | |

This will return the status of the response to **Start**.

Setting up a “Self-Managed” 360 Process

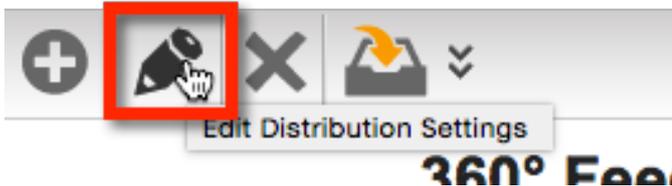
A Self-Managed 360 Process is one in which the review subjects (and optionally their managers) have a greater role in the choosing and managing reviewers. There are a number of options that can be selected that turn a 360 Process into self-managed.

Self-managed options are “turned on” by editing the 360 Degree Distribution as follows:

- Click on the **Methods** sub-menu under the **Distribution** tab



2. Click the **Edit Distribution Settings** toolbar button



Self-Managed 360 Processes require an Address Book

Before doing anything to make a self-managed 360 process, ensure that you have created an address book that can be used by the process as follows:

1. Click on the **My Contacts** menu
2. Click on the **Address Books** tab
3. Click the **Create New Address Book** toolbar button
4. Enter the address book details, and ensure the **Available to 360** checkbox is clicked

Address Book [X]

Add New Address Book

All Contacts must be attached to an Address Book. You can choose to use the default Address Book or set up specific Address Books where appropriate. Address Book contacts can be imported into Surveys as Respondents.

Title: My 360 Respondents

Description: This address book will be used as a place new people are added, and existing people can be searched for in a 360 Degree Feedback process.

This Address Book will be available to 360° Feedback Dashboards

Save Address Book

The settings that can be changed of a 360-degree feedback distribution are as follows:

Relationship Batch Code: 1

2 Display Home Page

3 Allow Respondent to Self Select Reviews

4 Allow Respondent to Add New Reviewers when a Reviewer does r

4 Allow Managers to Manage their Direct Reports

5 Allow Email Invitations and Reminders

Respondent Address Book: 6

Manager Relationship: 7

Standard Invitation:

Manager Invitation: 8

Standard Reminder:

Manager Reminder:

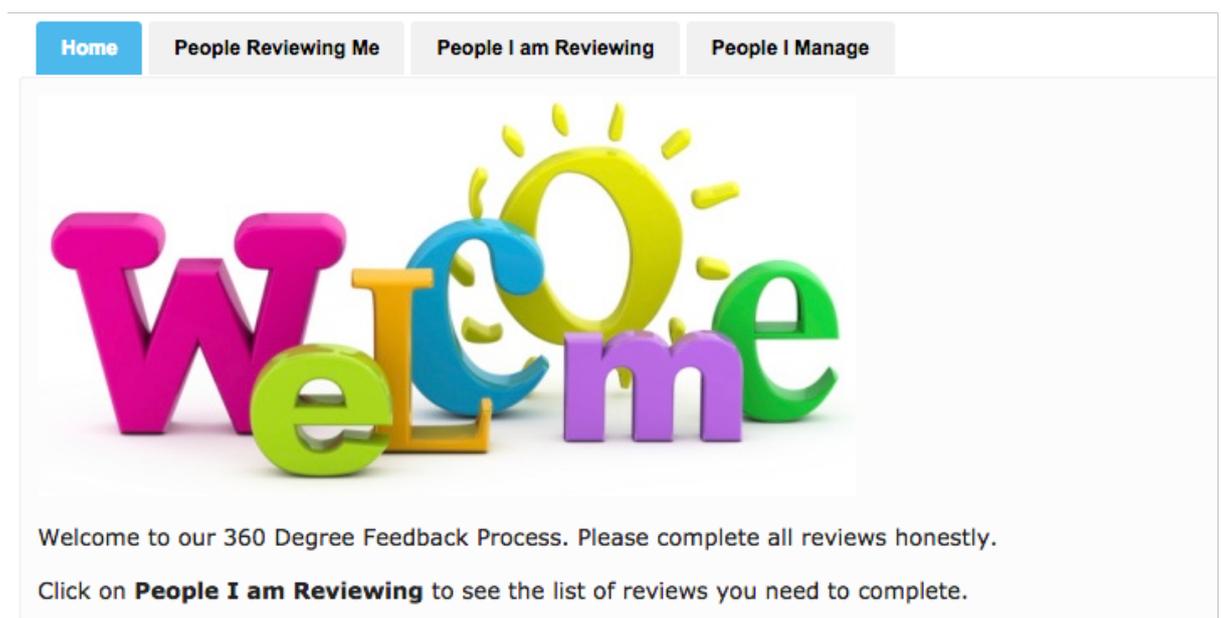
Report Template: 9

1. Whenever a 360 process is run, only relationships with a particular batch code are shown to respondents. This allows the same survey to be used for an ongoing process (e.g. quarterly reviews with batch codes 2015Q1, 2015Q2) and then the current quarter's batch can be used so they are the reviews currently shown.
2. A page with details for a respondent can be shown as the first page they see when they begin the process. The text for the home page can be entered, and can include images and other formatting tags.

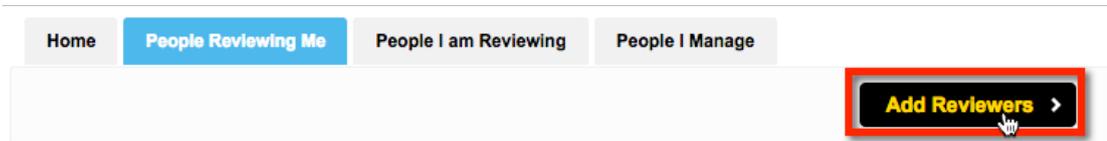
Home Tab Caption:

Home Tab Summary:

This content would result in a home page that looks like this:

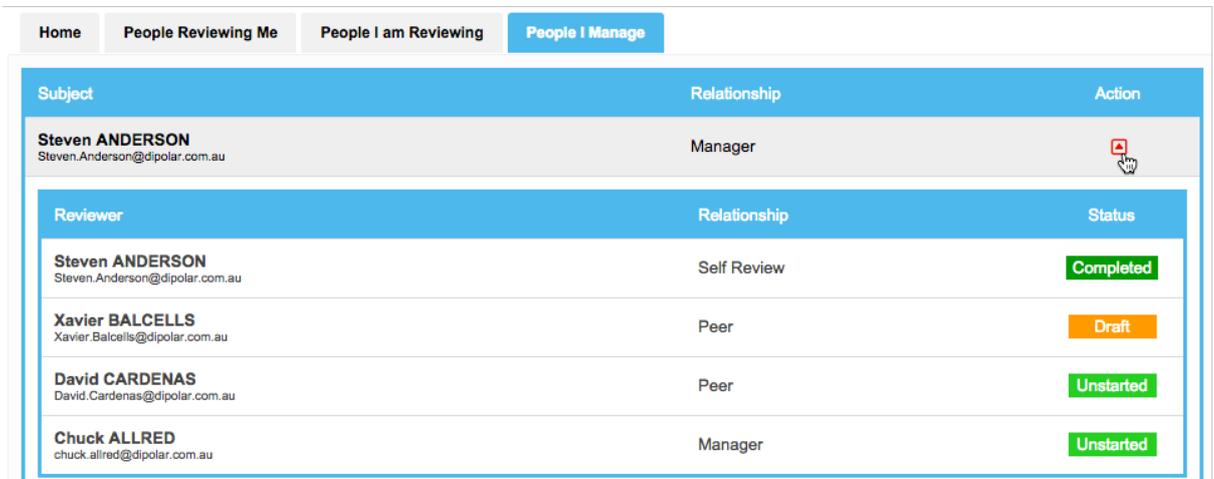


- Respondents can choose who will be reviewing them. These can be people who are already respondents in the survey (e.g. people that have been previously imported), people who exist in the attached address book (see point 6 below) and optionally people who the respondent adds to the address book (if the **Add New Reviewers** checkbox is checked)



See the section “How People can add their own Reviewers” for specific details.

- Managers can be given access to people that they manage so that they can see who has completed reviews on those people and (optionally if a template is added in point 9 below) print the reports for these people once business rules for completing reports have been met.



See the section “Managing Direct Reports through the Portal”

- People being reviewed can optionally be allowed to send invitations and reminders to reviewers through the portal. If they are given this ability, they can simply press a button in the interface. The Email template that has been chosen in the distribution (point 8 below) will be send to the reviewer when the button is pressed.



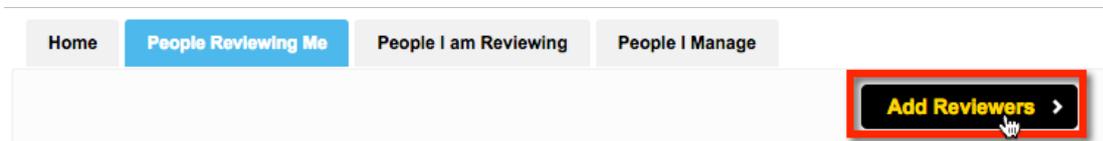
- If people being reviewed can choose who will be reviewing them, there must be a list of people to choose from. This list will be stored in a WSC Address Book. Only address books that have been specifically flagged as available for 360 Degree Feedback will be shown in the list to choose from. If review subjects are allowed to add new people into the system (**Allow Respondent to Add New Reviewers** is checked) these people will be automatically added into the linked Address Book at the same time it is added to the survey itself.
- If people who manage others will have be able to see these people in their own portal under “People I Manage”, the system needs to know which relationship indicates that a person is a

manager.

8. If Emails can be sent of from the portal, the templates to use for these Emails must be chosen (so that the right content is sent out). Managers can be sent different Emails to other reviewers if you wish to include different content.
9. Managers have the option of printing their direct reports' 360 Degree Feedback reports once the business rules for printing have been met. If a template is selected, the report printing capability will be available. If a template is not chosen, the printing capability will be left turned off.

How People can add their own Reviewers

As noted in the previous section, people can add their own reviewers in the Portal if the **Allow Respondent to Self-Select Reviews** checkbox is checked on the 360 Distribution. The **Add Reviewers** button is made available to people being reviewed.



There are a number of considerations when adding reviewers as follows:

1. When a search is done, the system will look for the person both in the list of respondents in the distribution, and the people in the attached address book.
2. If a person's details are entered and they cannot be found, they can be entered if **Allow Respondents to Add New Reviewers** is checked. Any person added will be added both as a respondent, and as a person in the attached address book.
3. The system has been specifically designed to enforce a lookup for a person before they can be added to make the add process as quick as possible (since a person added by someone else can be found and chosen quickly).

Adding an existing person as a Reviewer

The quickest and simplest reviewer addition occurs when an existing person is chosen. The steps are as follows:

1. Click the **Add Reviewers** button



2. Enter the name and/or Email address for the reviewer to look for



3. Click the **Find Person** button

- One or more people will be shown if they match the details entered. Click the **Choose Contact** button to choose a person

| First Name | Last Name | Email Address | Status |
|------------|-----------|---------------------------|-----------------------|
| ★ Julian | Cole | juliancole@dipolar.com.au | Choose Contact |

- Choose the appropriate relationship. It is their relationship to the respondent – if they are your manager, you choose “Manager”, whereas if you are their manager, you would pick “Direct Report”.

First Name: Julian
 Last Name: Cole
 Email Address: juliancole@dipolar.com.au

Relationship:

Add Relationship

- Click the **Add Relationship** button. The successful addition of the relationship will be shown, and further relationships can be added if needed.

"Julian Cole" has been added to review you as your "Peer".
 "Julian Cole" has been emailed.

First Name: Julian
 Last Name: Cole
 Email Address: juliancole@dipolar.com.au
 Relationship: Peer

Add Further Relationships

When searching for people name, email address, or some mixture of the two can be used. People that are found with an exact match to whatever is entered are shown with a solid green star.

| | | | | |
|---|--------|------|---------------------------|-----------------------|
| ★ | Julian | Cole | juliancole@dipolar.com.au | Choose Contact |
|---|--------|------|---------------------------|-----------------------|

If there is a partial match, a hollow orange star is shown. In the example below, we searched for “Co” – a partial match on the surname.

| | | | | |
|---|--------|------|---------------------------|-----------------------|
| ☆ | Julian | Cole | juliancole@dipolar.com.au | Choose Contact |
|---|--------|------|---------------------------|-----------------------|

Adding a New Person as a Reviewer

If the **Allow respondent to add new reviewers** checkbox is checked, review subjects can add new people to the system (if they are not already in the system). The process is similar to adding existing people:

1. Click the **Add Reviewers** button



2. Enter the name and/or Email address for the reviewer to look for

Form with input fields for "First Name" (containing "Jake"), "Last Name" (containing "Peters"), and "Email Address". To the right is an orange button labeled "Find Person >" with a mouse cursor icon.

3. Click the **Find Person** button
4. At this point, either no people will be shown, or the people listed will not include the actual person that needs to be chosen. The **Add New Contact** button can be pressed to complete the details for the person to be added.

Table with columns: First Name, Last Name, Email Address, Status. The table is empty and contains the text "No possible reviewers for you to select". Below the table is a red-bordered button labeled "Add New Contact >" with a mouse cursor icon.

5. The details that were entered in the search will be shown as the starting data for the new person to add. Note that the **Create New Reviewer** button will not be available until the complete details for the person are added.

Form with input fields for "First Name" (containing "Jake"), "Last Name" (containing "Peters"), and "Email Address" (containing "jake@fakemail.com"). To the right is a black button labeled "Create New Reviewer >" with a mouse cursor icon.

Once the complete details are added, the **Create New Reviewer** button can be pressed.

Form with input fields for "First Name" (containing "Jake"), "Last Name" (containing "Peters"), and "Email Address" (containing "jake@fakemail.com"). To the right is an orange button labeled "Create New Reviewer >" with a mouse cursor icon.

6. Choose the appropriate relationship. It is their relationship to the respondent – if they are your manager, you choose “Manager”, whereas if you are their manager, you would pick “Direct Report”.

Form showing details for the reviewer: First Name: Jake, Last Name: Peters, Email Address: jake@fakemail.com. Below this is a dropdown menu for "Relationship:" with "Direct Report" selected. To the right is an orange button labeled "Add Relationship >" with a mouse cursor icon.

7. Click the **Add Relationship** button. The successful addition of the relationship will be shown, and further relationships can be added if needed.

"Jake Peters" has been added to review you as your "Direct Report".
"Jake Peters" has been emailed.

First Name: Jake
Last Name: Peters
Email Address: jake@fakemail.com
Relationship: Direct Report

< Add Further Relationships

Managing Direct Reports through the Portal

One of the advanced features of the 360 Degree Feedback portal is the ability for managers to manage their direct reports. These features are accessible under the **People I Manage** tab. The following manager-focused features are available:

- A list of all direct reports can be seen
- All reviewers of these direct reports can be seen, including the current status of their reviews
- An individual report can be produced for each direct report, as long as the following requirements are met:
 - A report template must be set up on the distribution. The report produced will be based on this template.
 - The business rules set up in the distribution must be met (for example, a certain number of reviews may need to be completed before the report can be produced)

Viewing a List of Reviewers

The list of reviewers for a particular direct report can be viewed by pressing the **View** button. The listing can be collapsed by pressing the **Red Collapse Arrow**, or by viewing another person.

| Home | People Reviewing Me | People I am Reviewing | People I Manage |
|---|---------------------|-----------------------|---|
| Subject | | | |
| Steven ANDERSON Steven.Anderson@dipolar.com.au | | Manager |  |
| Reviewer | | | |
| Steven ANDERSON Steven.Anderson@dipolar.com.au | | Self Review | Completed |
| Xavier BALCELLS Xavier.Balcells@dipolar.com.au | | Peer | Draft |
| David CARDENAS David.Cardenas@dipolar.com.au | | Peer | Unstarted |
| Chuck ALLRED chuck.allred@dipolar.com.au | | Manager | Unstarted |
| Xavier BALCELLS Xavier.Balcells@dipolar.com.au | | Manager |  |
| David CARDENAS David.Cardenas@dipolar.com.au | | Manager |  |

Producing Reports

Reports can be produced if a template is set up and the rules for the report have been met. To see detail about setting up the rules see the next section – “Producing 360 Degree Reports”.

Producing 360 Degree Reports

Web Survey Creator has a very flexible reporting system. The key features of the system are as follows:

1. Reports are set up as “templates” that can be one of two types – Individual and Summary
2. All templates use a Microsoft Word document as the base document that defines the title pages, headers, footers, styles and where the content will be placed using integration symbols.
3. The 360 template defines three types of components that are used in the Microsoft Word Merge document
 - a. Paragraphs – what kind of content e.g. rating chart, table, comments
 - b. Relationships – what relationships will be included in a calculation
 - c. Competencies – the questions and grouping

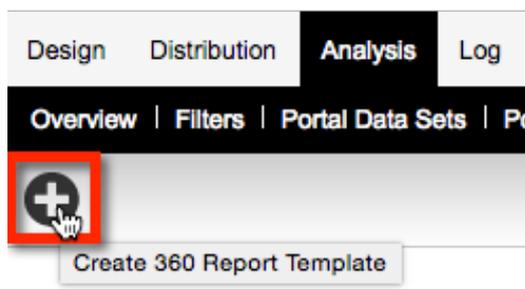
Creating a Report Template

All reports start with a template. To set up a template:

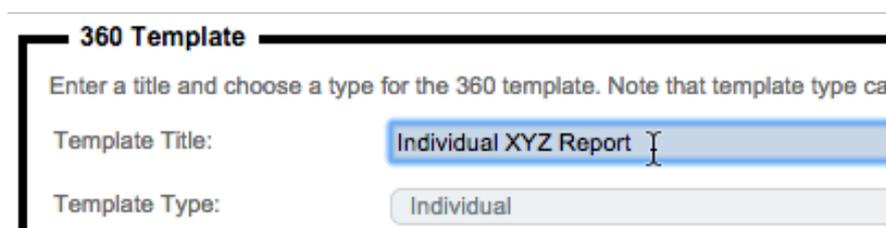
1. Click on the **360 Templates** submenu under the **Analysis** tab.



2. Click the **Create 360 Report Template** toolbar button.



3. Enter the name for the report, and choose either an **Individual** or a **Summary** report.

A screenshot of the '360 Template' form. The form has a title '360 Template' and a subtitle 'Enter a title and choose a type for the 360 template. Note that template type ca'. There are two input fields: 'Template Title:' with the text 'Individual XYZ Report' and a cursor at the end, and 'Template Type:' with a dropdown menu showing 'Individual'.

4. You can either choose a Word Merge file, or leave the merge file as the default.

Word Merge File:

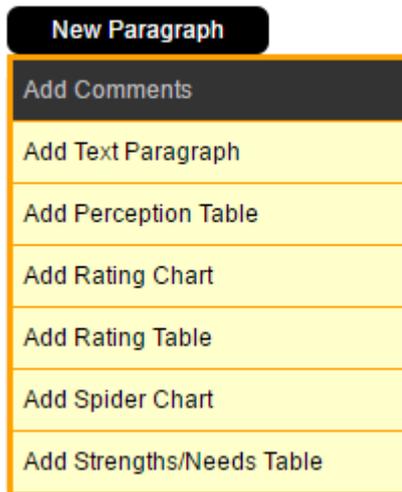
<Use default merge file...>

5. To save the template, click the **Save Template** button.

Save Template

Adding Paragraphs to a Report Template

Paragraphs can be added to a report template by pressing the **New Paragraph** button.



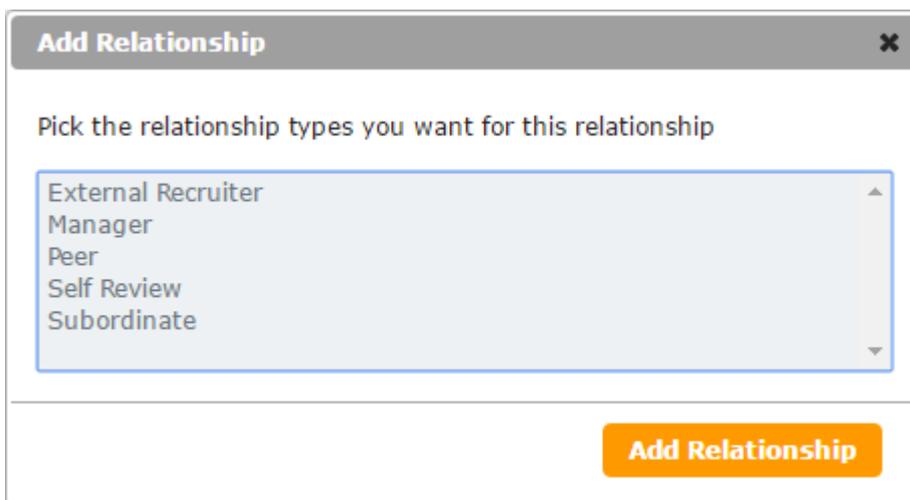
A paragraph describes how the data will be presented. E.g., a Rating Chart will give options for width, height and scale. We will go into more detail on each paragraph type later on in this section.

Adding Relationships to a Report Template

Relationships can be added by pressing the **New Relationship** button.



The user will then be given a list of relationship types to choose from. More than one can be selected.



When you create a “relationship” you can choose to consolidate one or more actual relationship types together. For example, you could create a “relationship” that will appear in the report as “All Third Parties” and add direct report, peer and manager relationship types together. This will consolidate their scores.

It is up to you how you choose to set up relationships. You could, for example, set up simple relationships like “Direct Report” that include a single relationship type only. While this is the more common way to use relationships, we have made it easy to consolidate relationships when needed.

An example script to describe relationships:

```
Name: RELS
1 {
2   "relationships": [
3     { "text": "Manager", "types": [ "MANAGER" ], "colour": "#70AD47", "group": "", "batchCodes": [ "DEFAULT" ] },
4     { "text": "Peer", "types": [ "PEER" ], "colour": "#7030A0", "group": "", "batchCodes": [ "DEFAULT" ] },
5     { "text": "Self Review", "types": [ "SELF" ], "colour": "#C00000", "group": "", "batchCodes": [ "DEFAULT" ] },
6     { "text": "Subordinate", "types": [ "SUBORDINATE" ], "colour": "#2E75B6", "group": "", "batchCodes": [ "DEFAULT" ] },
7   ],
8   "type": 7
9 }
```

Key elements of a relationship:

Text – what will be displayed when the relationship is used in a chart.

Types – the relationship types included in this relationship.

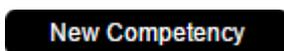
Colour – the colour of the relationships (specifically for rating charts). Html hex colour.

Group – same grouped relationships will merge if they have 1 response only. This is to keep anonymity for the results.

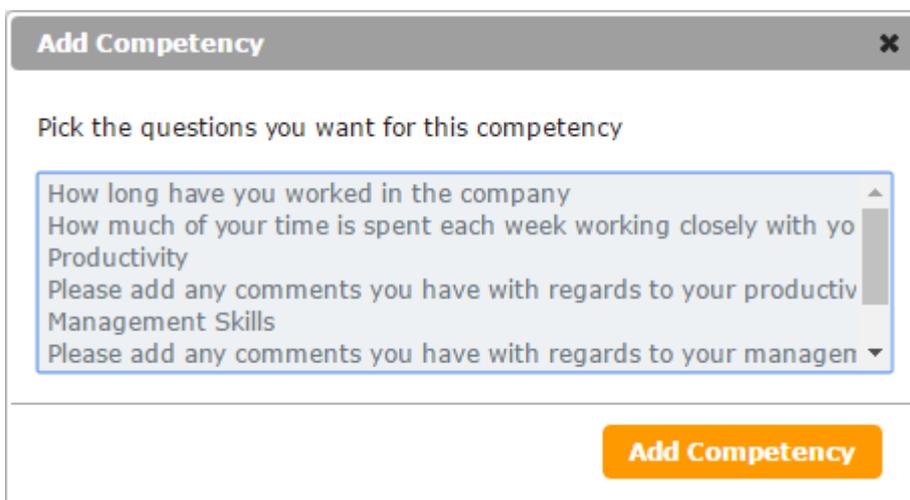
Batchcodes – you can specify which batchcode the relationship uses. Could be used for including previous 360 results in a new report.

Adding Competencies to a Report Template

To add a competency click on the **New Competency** button.



The user will then be given a list of questions to choose from. More than one choice can be selected.



A competency represents a question or group of questions. A single competency can have multiple questions to form a summary.

```
Name: PRODCUSTOM
1 {
2   "competencies": [ { "shortText": "Willing to improve", "questions": [ "PROD:1" ] },
3     { "shortText": "Sort problems early", "questions": [ "PROD:2" ] },
4     { "shortText": "Establish objectives", "questions": [ "PROD:3" ] },
5     { "shortText": "Get results", "questions": [ "PROD:4" ] },
6     { "shortText": "Efficient", "questions": [ "PROD:5" ] },
7     { "shortText": "Sound logic", "questions": [ "PROD:6" ] }
8   ],
9   "scale": [ 1, 2, 3, 4, 5, 6 ],
10  "decimals": 1,
11  "type": 8
12 }
```

Key elements of

Competencies

Title – used in the perception table to group individual competencies.

shortText – replaces question text (useful where there is space constraints on a chart)

Questions – list of question code/values. For an individual matrix question row use Q:1
for a summary of matrix questions use Q:1,2,3,4,5,6

Scale – at this point you can change the ...

Decimals – number of decimal places

How these components fit together

You might be wondering how each of these components relate to each other. The way the 360 report works is the 360 template defines the parts that will be used in the merge document. The merge document implements these using codes. The next section of this guide explains how to create a word merge file and how the components are used to generate the desired outcome.

Creating a Word Merge file

A Microsoft Word document is where all the design and layout is made.

Downloading/Uploading the merge file

To create a custom merge file, start with the default file by pressing the **Download Merge File** button.

Download Merge File

To upload your modified merge file, simply click on the **Upload Merge File** button.

Upload Merge File

Click on the dark red block or drag and drop the word document.



What goes in the document?

In order to utilize the 360 templates components, you need to use their names (codes) in a certain way.

The format for the codes follows a standard WSC convention.

A rating chart/table

[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@]

A reviewer listing

[@PARAGRAPH:RELATIONSHIPS@]

A competency score

[@RELATIONSHIPS:COMPETENCIES@]

A count of relationships

[@RELATIONSHIPS@]

A simple example:

The document

Productivity Details

[@RATINGCHART:RELS:PROD@]

Paragraph definition – a Rating Chart with auto width/height and scale showing

RATINGCHART Delete Save

Name:

```
1 {
2   "showScale": true,
3   "width": "auto",
4   "height": "auto",
5   "type": 2
6 }
```

Relationship definition – a list of 4 standard relationships

RELS Delete Save

Name:

```
1 {
2   "relationships": [
3     { "text": "Manager", "relationships": [ "MANAGER" ], "colour": "#70AD47", "group": "", "batchCodes": [ "I" ] },
4     { "text": "Peer", "relationships": [ "PEER" ], "colour": "#7030A0", "group": "", "batchCodes": [ "DEFAULT" ] },
5     { "text": "Self Review", "relationships": [ "SELF" ], "colour": "#C00000", "group": "", "batchCodes": [ "S" ] },
6     { "text": "Subordinate", "relationships": [ "SUBORDINATE" ], "colour": "#2E7586", "group": "", "batchCodes": [ "S" ] },
7   ],
8   "type": 7
9 }
```

Competency definition – a list of 6 question rows for a matrix with shortened question text.

PRODCUSTOM Delete Save

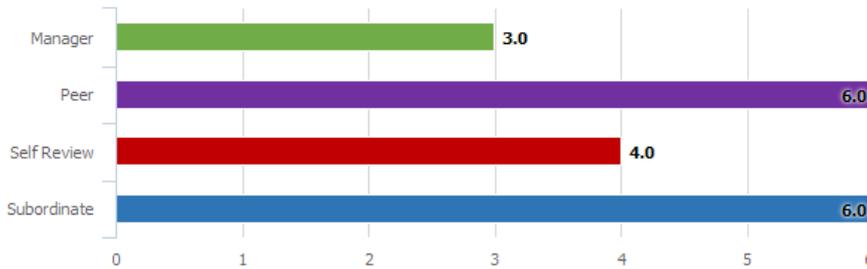
Name:

```
1 {
2   "competencies": [ { "shortText": "Willing to improve", "questions": [ "PROD:1" ] },
3     { "shortText": "Sort problems early", "questions": [ "PROD:2" ] },
4     { "shortText": "Establish objectives", "questions": [ "PROD:3" ] },
5     { "shortText": "Get results", "questions": [ "PROD:4" ] },
6     { "shortText": "Efficient", "questions": [ "PROD:5" ] },
7     { "shortText": "Sound logic", "questions": [ "PROD:6" ] }
8   ],
9   "scale": [ 1, 2, 3, 4, 5, 6 ],
10  "decimals": 1,
11  "type": 8
12 }
```

The result

Productivity Details

I am always willing to seek out new techniques to improve my productivity

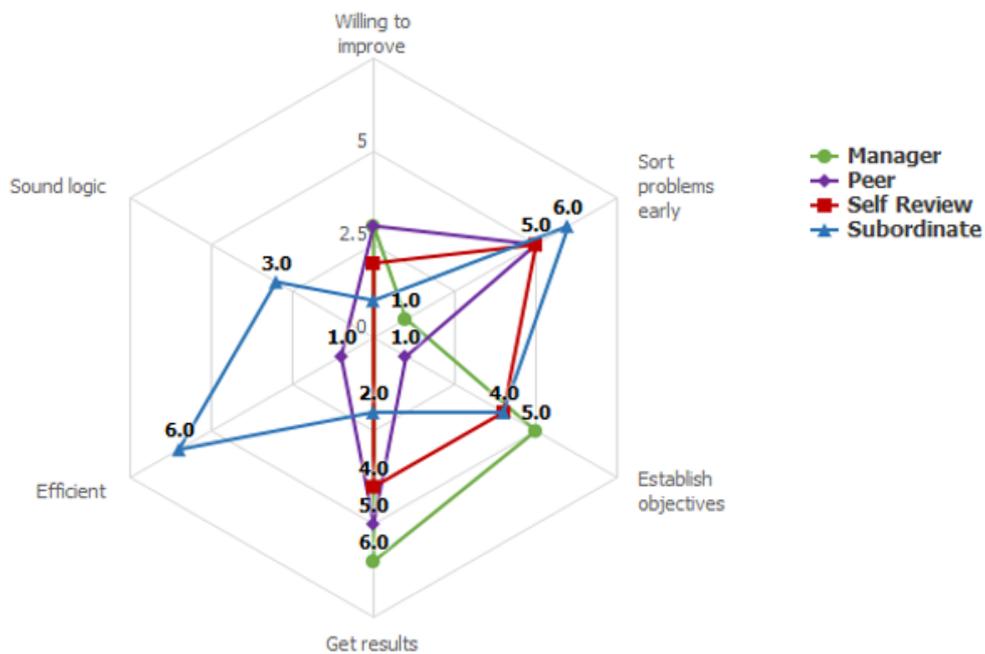


What is great about this setup, is simply by changing the paragraph code to one that is a spider chart

Productivity Summary

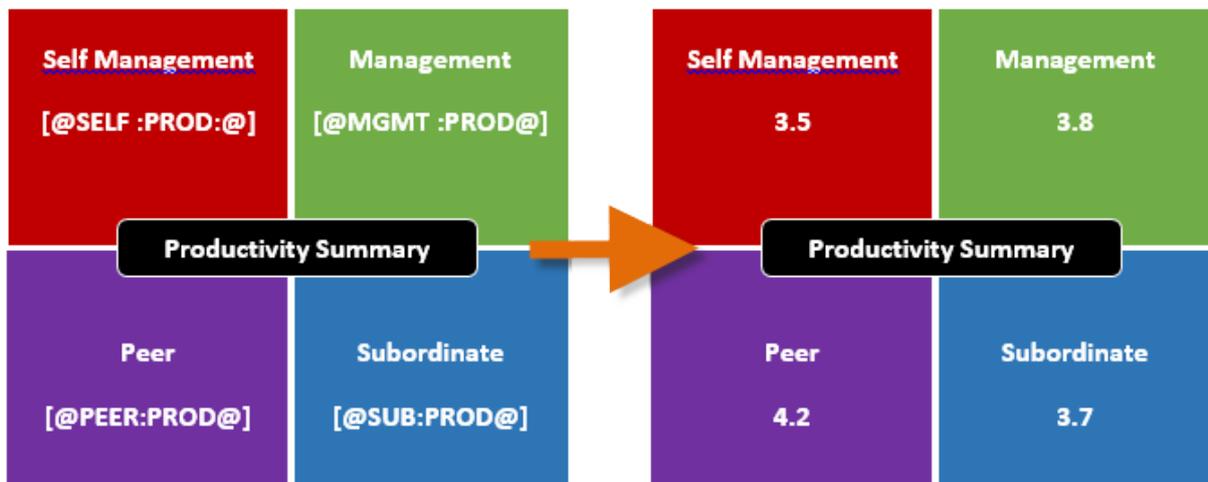
`[@SPIDERCHART:RELS:PROD @]`

Using the same relationship and competency code, nets you this:



A competency score

Using the following integration format `[@RELATIONSHIPS:COMPETENCIES@]` will result in a numeric value being rendered. This might be useful where you want to represent the data in a way that is not provided by the paragraphs available. For example:



Printing a 360 Report

When a 360 Report is printed, the content of the report will be determined by:

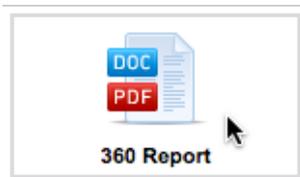
1. What content has been set up in the template you choose to use for the report
2. Which review subjects are chosen at the time of producing the report
3. Other settings, such as whether to produce one PDF for all review subjects, or individual PDFs for each review subject

To print a 360 Degree Feedback Report:

1. Click on the **Analysis** tab, and choose **Reports & Exports**



2. Choose the **360 Report**



3. Give the report a **Title**, and choose a language and **Report Template**. The report template will be the template set up in the previous section of this manual

| | |
|---------------|---|
| Report Title: | <input type="text" value="360 Report for XYZ Company"/> |
| Language: | <input type="text" value="English (Default Language)"/> |
| 360 Template: | <input type="text" value="Individual XYZ Report"/> |

4. Choose which **Review Subjects** to include in the report.

Review Subjects

You can print this report for one or more review subjects. To print for all subjects, select the print all option below.

Print all review subjects
 Print for selected review subjects a

Chuck ALLRED b
 Steven ANDERSON
 Xavier BALCELLS
 David CARDENAS

Skip subjects that have not reviewed themselves c
 Skip subjects that have outstanding reviews by 3rd parties d
 Skip subjects with less than 3rd party reviews e

Report Print Options

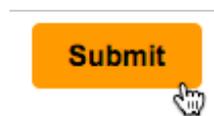
Print all review subject reports in a single document f
 Print each review subject report as a separate document g

Create reports as PDF documents and place in a ZIP file
 Create reports as word documents (.docx) and place in a ZIP file

The settings that can be entered for review subjects are:

- a. Selecting all or selected review subjects. Note that the list of review subjects that is shown will be affected by the settings in points c, d and e below
- b. If selected review subjects have been chosen in point a, the people listed can be chosen. If all review subjects have been chosen, this list will be disabled, and everyone in the list is automatically chosen.
- c. If **Skip subjects that have not reviewed themselves** is checked, all subjects yet to complete a review will be removed
- d. If **Skip subjects that have outstanding reviews by 3rd parties** is checked, subjects with outstanding reviews will be removed
- e. Optionally, a minimum number of 3rd party reviews can be chosen, so that review subjects can still have their reports printed if they have the minimum number (even if there are still some outstanding reviews)
- f. If there are multiple individual reviews to be printed, it is possible to have them placed in a single PDF file, which is the most convenient way to get the reports ready to print
- g. If each review subject will receive their report as a soft copy, individual files – either in pdf or .docx format – can be produced. They will be placed in a single ZIP file so that they can be easily downloaded as a single file.

5. Press the **Submit** button to submit the report for processing.



There are a number of paragraph types that can be used to create a report. Each of these paragraphs have a certain set of properties that can be set to change the formatting and content of the paragraph. These are discussed in the next section

360 Report Paragraphs – Strengths/Needs

The Strengths/Needs paragraph is designed to show the top things a review subject is doing well, and/or the things that they need to improve on. The calculation for this paragraph is as follows:

$$\text{Highest Possible Rating} - \text{Rating Achieved} = \text{Gap}$$

For example, if a review subject scored an average of 5.5 for a particular area, and the top score was 6, their gap would be calculated as follows:

$$6 - 5.5 = 0.50$$

A large gap indicates that there is a lot of improvement possible. A small gap indicates that the review subject is strong in the particular area.

The integration format to use is `[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@]`

To add a strengths/needs paragraph, click **Add Content Here** and choose **Add Strengths/Needs Table**.



The details that may be set for a strengths/needs table are as follows:

1. The name is used to reference this component in the merge document. Keep it short but informative.
2. The tables column headings can be re-worded.
3. This paragraph is set up to either show strengths, or development needs – never both. If this is a strengths paragraph, set **“strengths”** to **true**, otherwise make it **false**.
4. The top or bottom performance areas are shown in this paragraph. The **“ranks”** setting indicates how many areas to include in the list. If the last-ranked item has the same gap as other areas, all areas with the same gap will be shown. Therefore, even though the number of ranks may be set to 4, there may end up more than four areas shown in the report because the fourth ranked item has the same gap as the fifth, sixth etc.
5. The **“type”** of the paragraph is an internal value that should never be touched.

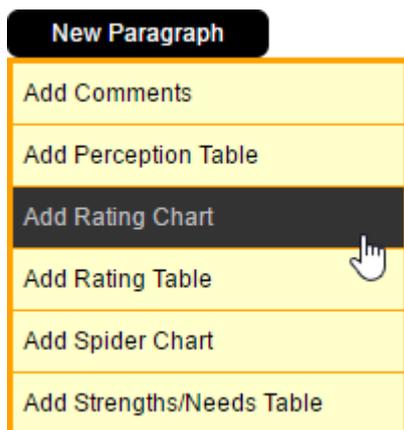
360 Report Paragraphs – Rating Chart

The Rating Chart paragraph is designed to show charts for one or more questions and one or more relationships. You can:

- Include one or more questions in a single chart
- Include one or more relationships and batches in the data for a single bar within the chart

The integration format to use is [[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@](#)]

To add a rating chart paragraph, click **Add Content Here** and choose **Add Rating Chart**.



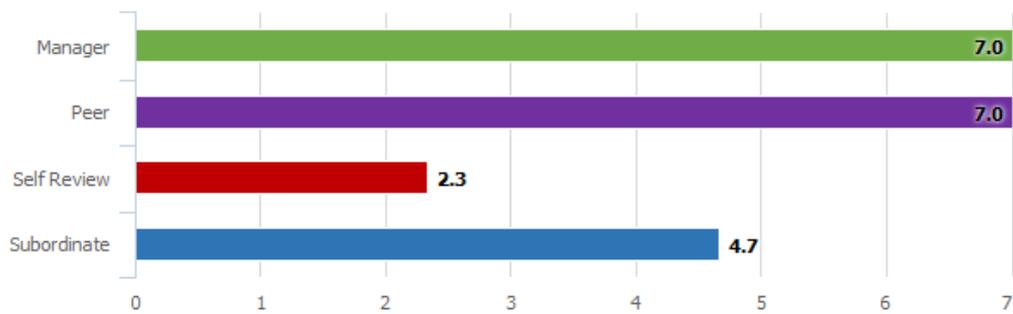
Since the data is controlled by what relationships and competencies you use with this paragraph, you may only need one rating chart for the template. A few settings can be changed as seen below:



1. The name of the paragraph can be entered. This is the name to use when referencing it within the merge document.
2. You can turn the scale on or off. The scale is defined on the competency.
3. You can set the width and height (in pixels).
4. The “type” of the paragraph is an internal value that should never be touched.

An example of how the rating chart paragraphs look is as follows:

I am effective in establishing objectives



The key components of this paragraph are:

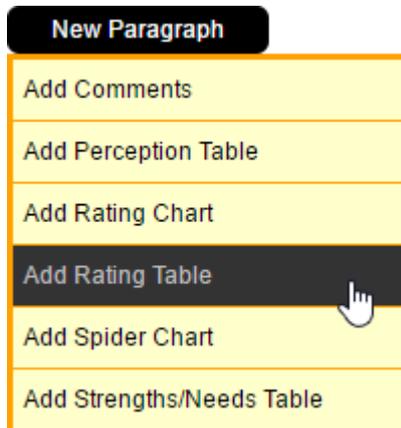
1. The statements
2. The relationships (each one a bar in the chart)
3. The rating scale

360 Report Paragraphs – Rating Table

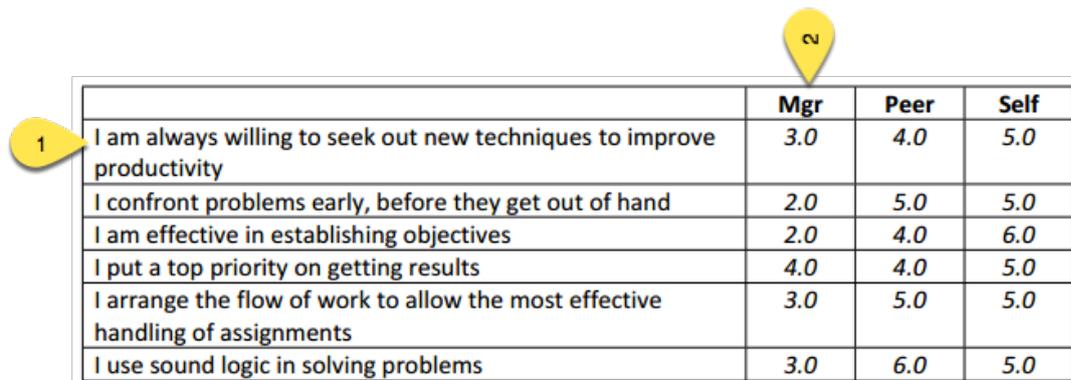
The Rating Table paragraph is designed to show a table of numeric ratings that are calculated in a similar way to rating charts.

The integration format to use is `[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@]`

To add a rating table paragraph, click **Add Content Here** and choose **Add Rating Table**.



The setup of the paragraph is the same as the setup for the Rating Charts. The resultant table looks as follows:



| | Mgr | Peer | Self |
|--|------------|-------------|-------------|
| 1 I am always willing to seek out new techniques to improve productivity | 3.0 | 4.0 | 5.0 |
| I confront problems early, before they get out of hand | 2.0 | 5.0 | 5.0 |
| I am effective in establishing objectives | 2.0 | 4.0 | 6.0 |
| I put a top priority on getting results | 4.0 | 4.0 | 5.0 |
| I arrange the flow of work to allow the most effective handling of assignments | 3.0 | 5.0 | 5.0 |
| I use sound logic in solving problems | 3.0 | 6.0 | 5.0 |

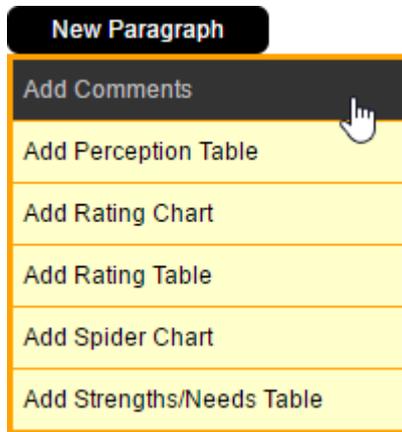
1. The rows of the table are the statements
2. The columns of the table are relationships

360 Report Paragraphs – Comments

The Comments paragraph will show a listing of text comments.

The integration format to use is `[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@]`

To add a comments paragraph, click **Add Content Here** and choose **Add Comments**.



A single comments paragraph can be created to cater for both single text questions and matrix text questions. The following settings can be changed:

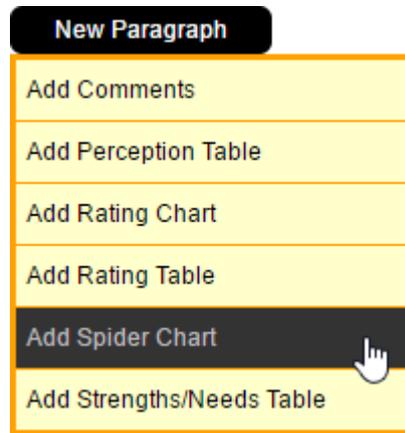


1. The name of the paragraph can be entered (used to reference it in the merge document).
2. You can choose to show the question text.
3. The “type” of the paragraph is an internal value that should never be touched.

360 Report Paragraphs – Spider Chart

The Spider Chart paragraph provides a different visual representation of the same data as the rating chart.

The integration format to use is `[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@]`

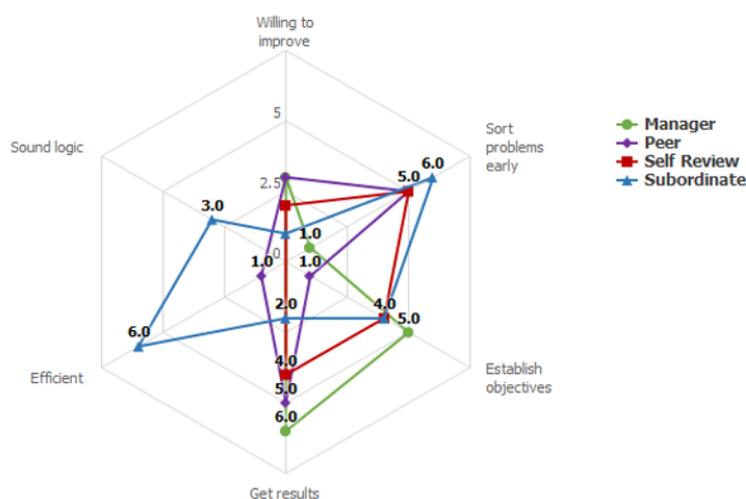


In most cases, only one spider chart will be required unless specific changes need to be made, which can be done by editing the following settings:



1. The name of the paragraph can be entered. This is the name to use when referencing it within the merge document.
2. You can turn the scale on or off. The scale is defined on the competency.
3. You can set the width and height (in pixels).
4. The “type” of the paragraph is an internal value that should never be touched.

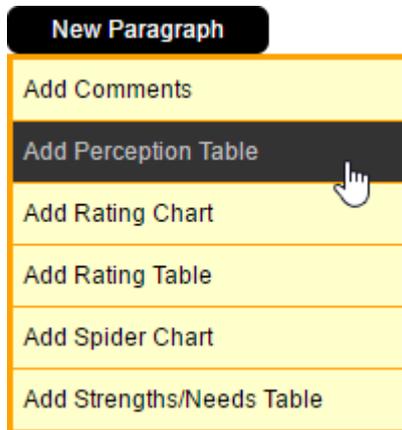
An example of the spider chart:



360 Report Paragraphs – Perception Table

The Perception table paragraph shows the difference between the self review and what their reviewers thought. The table can show the positive or negative results.

The integration format to use is [[@PARAGRAPH:RELATIONSHIPS:COMPETENCIES@](#)]



A perception table should be created for both positive and negative results as it cannot cater for both.



1. The name of the paragraph can be entered. This is the name to use when referencing it within the merge document.
2. You can change the text for each of the column headings.
3. You can set whether to show the positive or negative results.
4. The “type” of the paragraph is an internal value that should never be touched.

An example of the perception table:

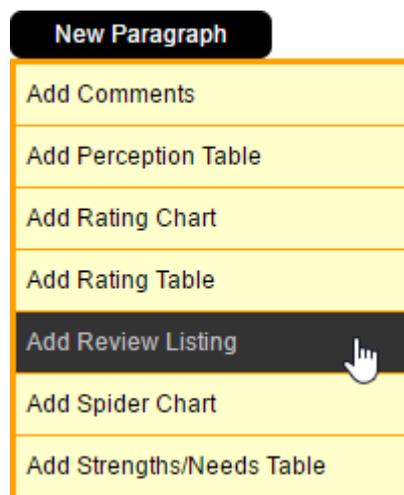
Positive Differences in Perception

| Competency | Question | Other | Self | Difference |
|--------------|--|-------|------|------------|
| Productivity | I arrange the flow of work to allow the most effective handling of assignments | 5.0 | 0.0 | 5.0 |
| Management | I am effective in training subordinates | 5.0 | 1.0 | 4.0 |
| Productivity | I am effective in establishing objectives | 4.3 | 1.0 | 3.3 |
| Productivity | I put a top priority on getting results | 3.3 | 0.0 | 3.3 |
| Productivity | I confront problems early, before they get out of hand | 6.0 | 3.0 | 3.0 |
| Productivity | I am always willing to seek out new techniques to improve my productivity | 2.7 | 0.0 | 2.7 |
| Personal | I put in extra time and effort when needed | 5.7 | 3.0 | 2.7 |

360 Report Paragraphs – Review Listing

The review listing paragraph creates a table with the relationships between subject and reviewers.

The integration format to use is [[@PARAGRAPH:RELATIONSHIPS@](#)]



The review listing paragraph has no settings that you can modify.

| REVIEW LISTING | | | |
|------------------------|--------------|------------------------|----------------------|
| Subject | Relationship | Third Party | Response Date |
| Chuck Allred | Self Review | Chuck Allred | 4/22/2016 1:05:36 AM |
| Chuck Allred | Subordinate | Steven Anderson | 4/22/2016 1:17:00 AM |
| Chuck Allred | Subordinate | Xavier <u>Balcells</u> | 4/22/2016 1:21:29 AM |
| Chuck Allred | Subordinate | David Cardenas | 4/22/2016 1:24:41 AM |
| Xavier <u>Balcells</u> | Peer | David Cardenas | 4/22/2016 1:23:36 AM |

Data Piping for 360 Degree Feedback Surveys

When creating 360 Degree Feedback surveys, there are a number of specialized data piping codes that can be used. Below is a complete list of the codes available.

| Data Piping Symbol | Example Data |
|-----------------------------|--|
| SUBJECTFIRSTNAME | Jake |
| SUBJECTLASTNAME | Peters |
| SUBJECTFULLNAME | Jake Peters |
| SUBJECTEMAILADDRESS | jake@gmail.com |
| SUBJECTTAG | DIVISION:Human Resources |
| REVIEWERFIRSTNAME | Mary |
| REVIEWERLASTNAME | Phillips |
| REVIEWERFULLNAME | Mary Phillips |
| REVIEWEREMAILADDRESS | mary@gmail.com |
| REVIEWERTAG | DIVISION:Corporate |

There are two sets of codes – one for the subject (the person being reviewed) and one for the reviewer. The reviewer codes mirror the data you can get from standard respondent tags, since the reviewer *is* the respondent.