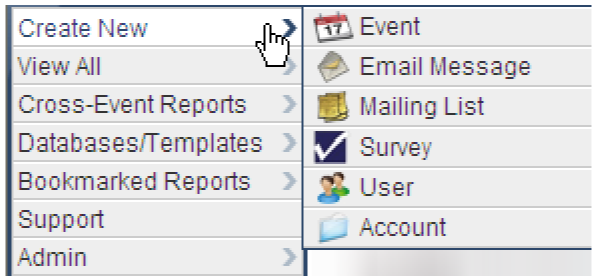
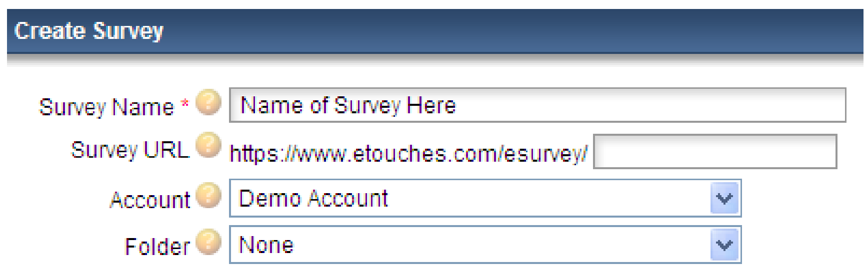
eSurvey Manual

Creating a Survey: To create a survey, scroll your mouse over the “Create New” box and select “Survey” from the pop out menu to the right.

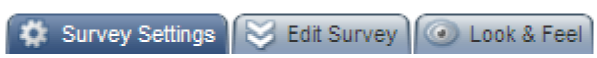




After clicking “Survey,” a new window will open asking for brief details of the survey, such as the name, account and folder.

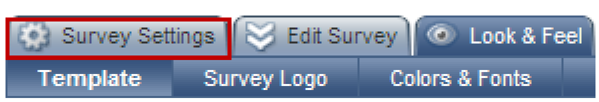
In this box, input the name of your survey, your account, and a folder to place it under. Folders are used to organize surveys, but if you choose to not use a folder you can select “none”. When finished click “Create Survey”.

Once your survey has been created, you will be able to edit your survey in sections using the tabs across the top of the page. These tabs are explained in detail below.

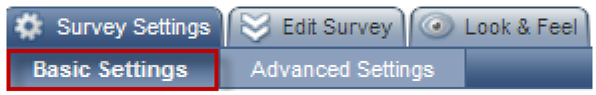


Survey Settings Tab:

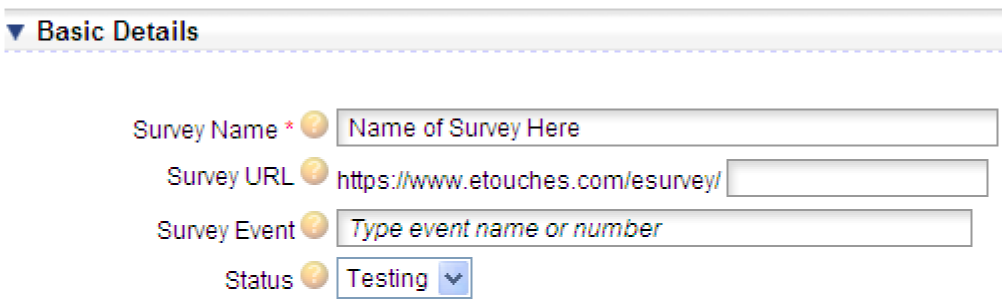
Within the Survey Settings Tab you can edit your Basic Settings and Advanced Settings.



Basic Settings: Within the Basic Settings you can edit the basic details about your survey, add question numbering, add a thank you page, and create a public summary all within the basic settings sub-tab.

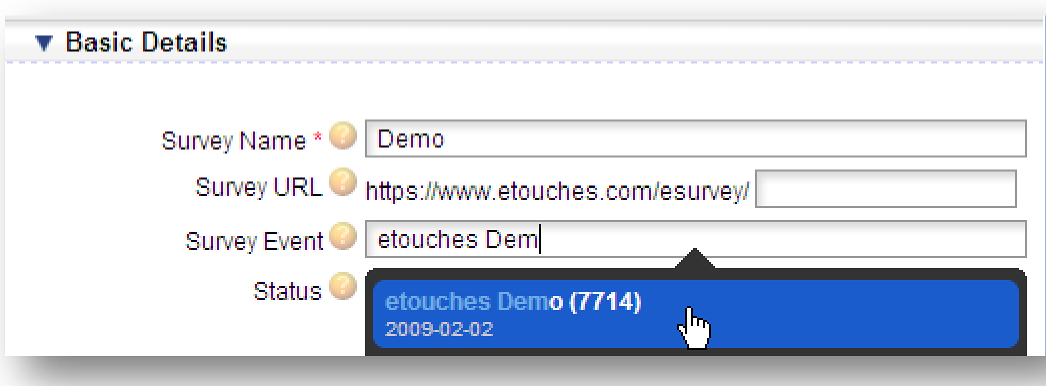


Basic Details:



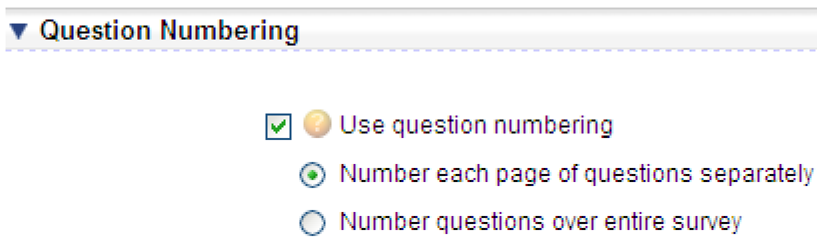
Survey Name: Here you can edit the name of your survey
Survey URL: Here you can place a specific URL to link to your survey by adding text into the small box located at the end of the default URL. If you do not wish to use a specific URL, a number will be assigned to the end of the URL.
Survey Event: Here you can list the name or event number that this survey is collecting feedback for. Please note that this field is case sensitive and will not link unless the name entered matches exactly to the etouches event name.

For Further Details on linking your survey to an event please see Pages 19-20 of this manual



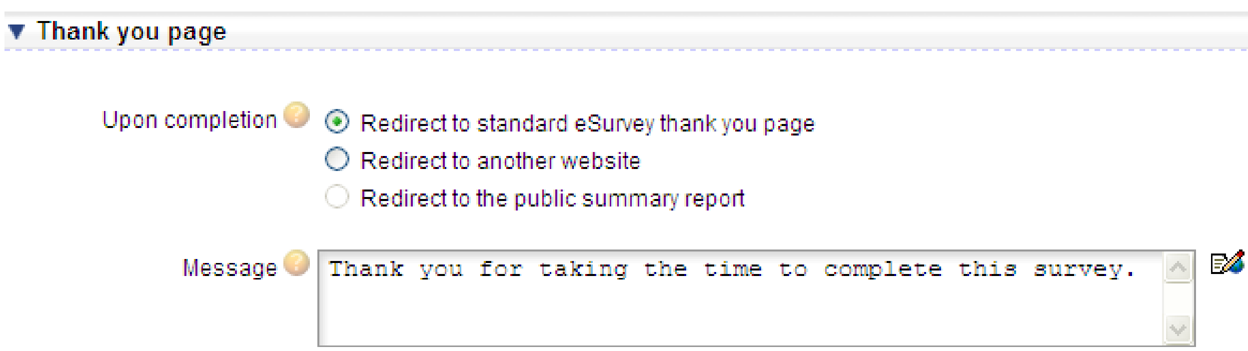
Status: Here you can select the status of your survey. The options include: Testing, Active, Inactive, and complete. Responses to your survey will only be recorded if the survey is placed in an “Active” status.

Questions Numbering:



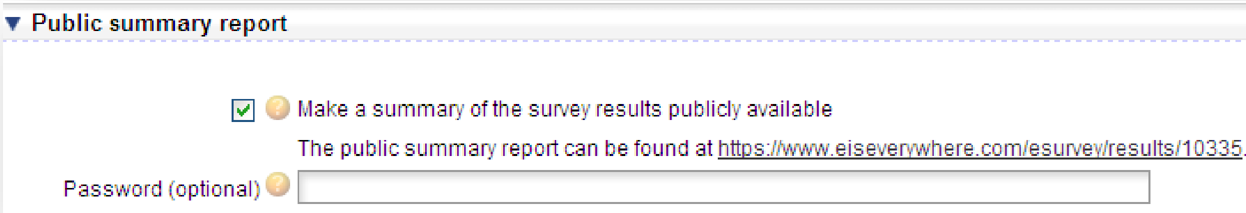
Use Question Numbering: If you use question numbering then your survey questions will automatically be numberede when you view the survey. Shown in the picture above, you can choose to number each page separately or number the questions over the entire survey.

Thank You Page:



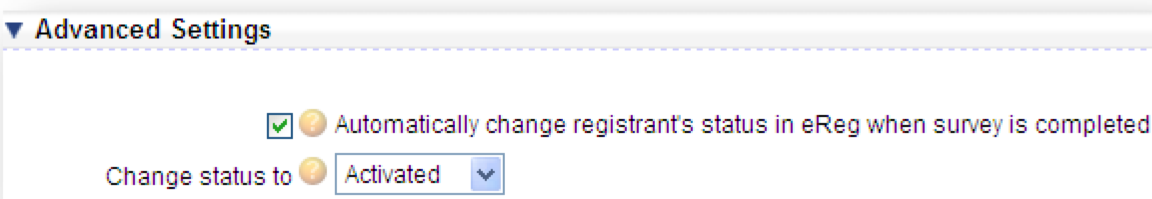
Upon Completion: This option configures what people should see when they complete the survey.
Message: This is the message that will display to the respondents when they have completed your survey.

Public Summary Report:



Make a summary of the survey results publicly available: Making your survey results publicly available allows you to easily display a summary of the inputs to any interested parties without requiring they they have an etouches login. The system will create a custom URL you can distribute as well as give you the option to password protect these results.

Advanced Settings: Within the Advanced Settings you can also automatically change your registrant's status in eReg when a survey is completed.



Automatically change your registrant's status in eReg when a survey is completed: Checking this box allows you to automatically change a registrant’s status in eReg when they complete a survey. To select the registrant’s status you can change this within the dropdown selection labeled: Change status to

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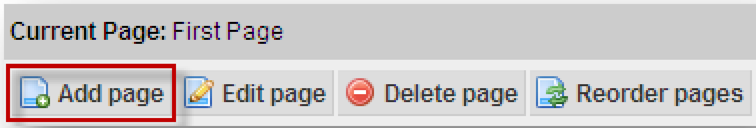
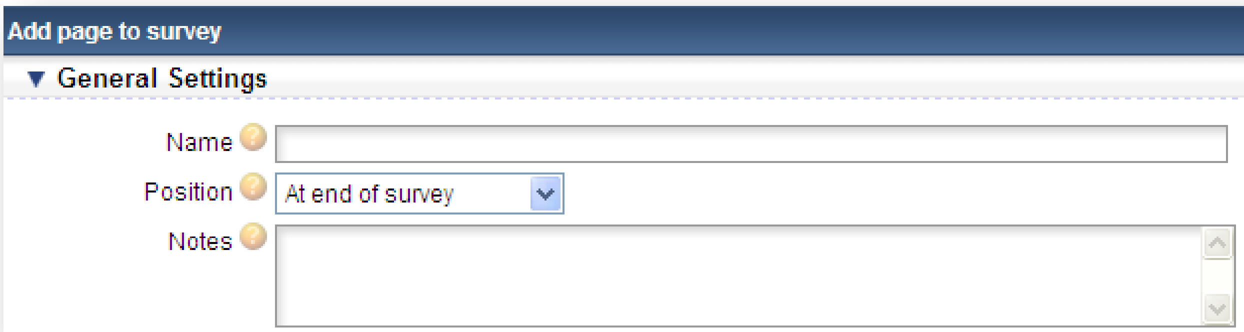
Edit Survey Tab:
Within the Edit Survey Tab you can edit your survey by adding pages, heading, and questions.

Add Page: Shown in the screen shot below is where you can select to add a new page to your survey



Add Page > General Settings:



> **Name:** This is the name of the page you are adding
> **Position:** Here you can select where in the survey you would like this page to appear
> **Notes:** These notes are for internal purpose, to help you and your colleagues identify the page

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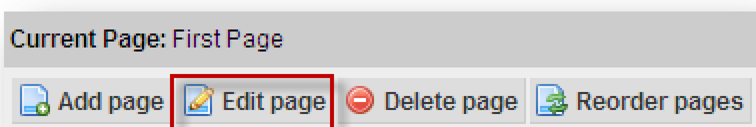
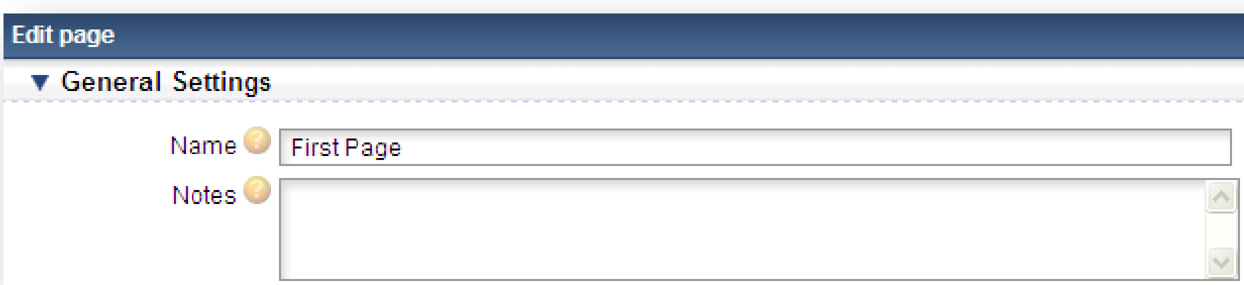
Edit Page: Shown in the screen shot below is where you can select to edit a page in your survey



Edit Page> General Settings:



Name: This is the name of the page you are editing
Notes: These notes are for internal purpose, to help you and your colleagues identify the page

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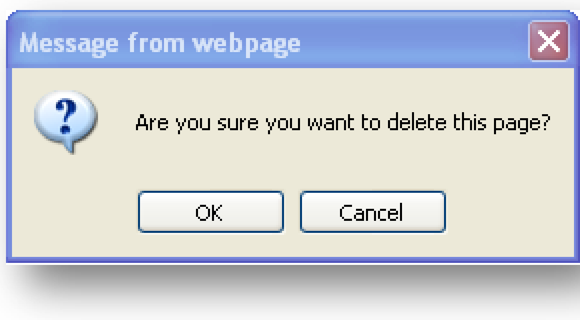
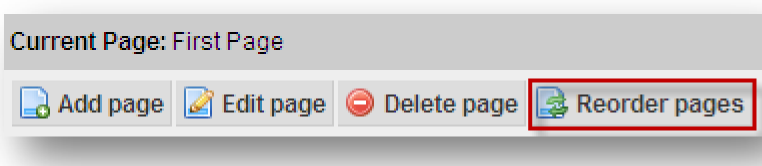
Delete Page: Shown in the screen shot below is where you can select to delete a page to your survey

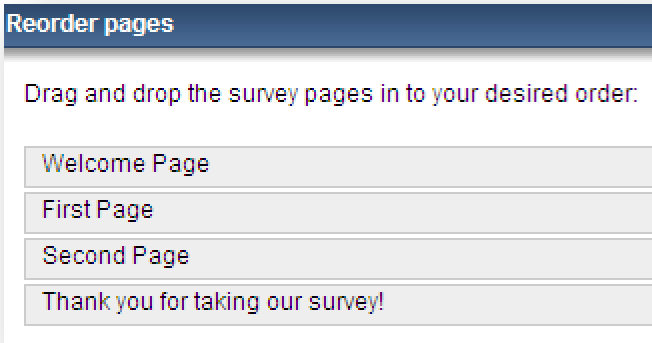
Delete Page: Selecting delete page will delete the current page you are on. The system will prompt you below to verify if you would like to delete this page.



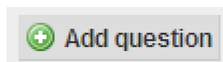
Reorder Pages: Shown in the screen shot below is where you can select to reorder the pages of your survey



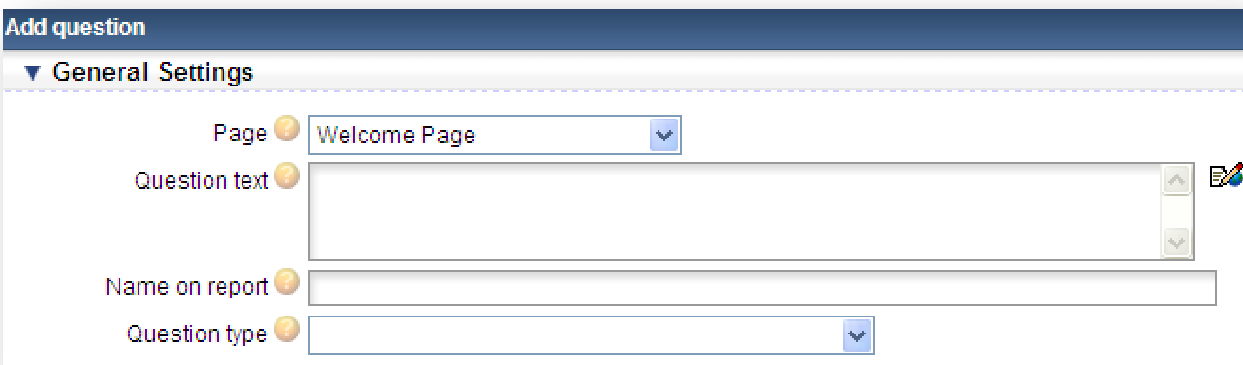
Reorder Pages: When selecting to reoder pages a screen will appear like the one shown below. You then will have the ability to drag and drop the pages in the updated order you would like them to apper in.



Adding a survey question:



Add Question > General Settings:

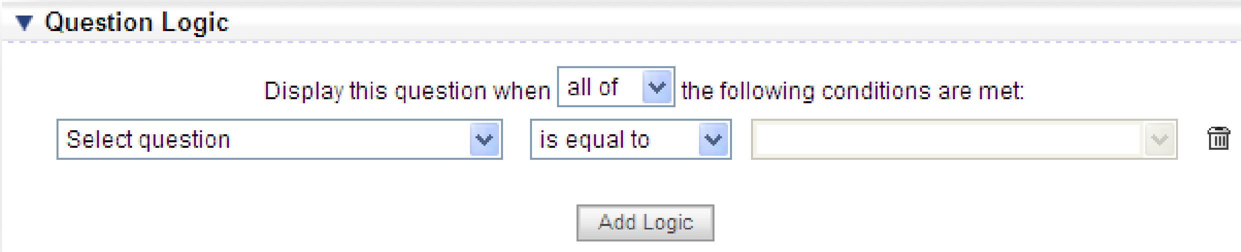


Page: Here you can select the page of the survey that this question should appear on.
Question Text: Here you can enter the text that should appear with the question.
Name on Report: Here you can enter a short name for this question that will be used for reporting
Question Type: Here you can select the type of question you want this to be. The selections include:

- Heading → No Input
- Single Line of Text → One line available for survey response
- Multiple Lines of Text → Mulitple lines available for survey response
- Comments → Mulitple lines available for survey response or essay
- Radio Buttons → Multiple choice, one answer (Logic can be added to this input- See below for details on adding logic to a question)
- Dropdown Box → Multiple choice, one answer (Logic can be added to this input- See below for details on adding logic to a question)
- Check Boxes → Multiple choice, multiple answers
- Martrix Radio Buttons → One answer per row (See below for additional info on Matrix Setup)

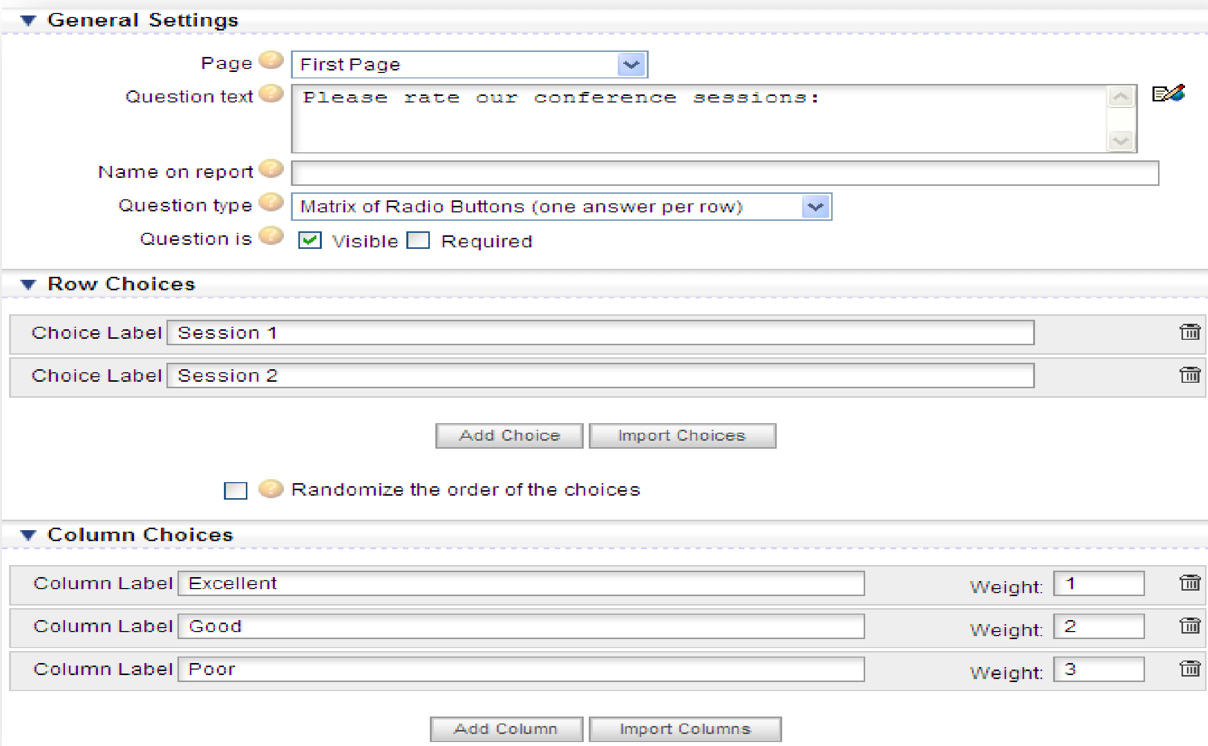
- Martrix Check Boxes → Multiple answers per row (See below for additional info on Matrix Setup)

Logic: Question logic is available for all input types. Logic allows you to setup additional questions based off the responses from other questions within the survey that have finite answers such as (radio buttons, or dropdown selection questions). As seen in the below screen shot you have the ability to select a question and choose the response that will be the logic in order to allow the attendee to continue.

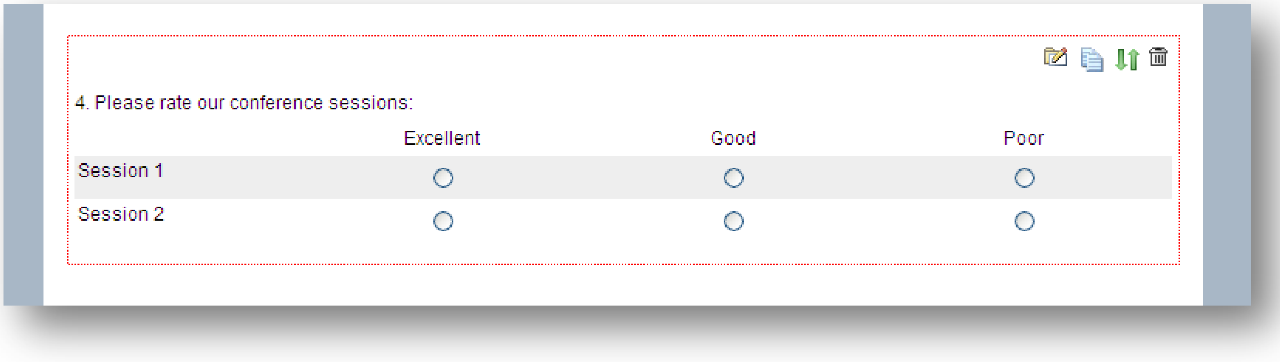


Matrix: Using matrix question will allow you to setup questions with multiple columns and rows, but allow only one selection per row. This feature is used commonly for ranking purposes and can be setup like below.

Matrix Setup:



Matrix Question displayed on Survey:



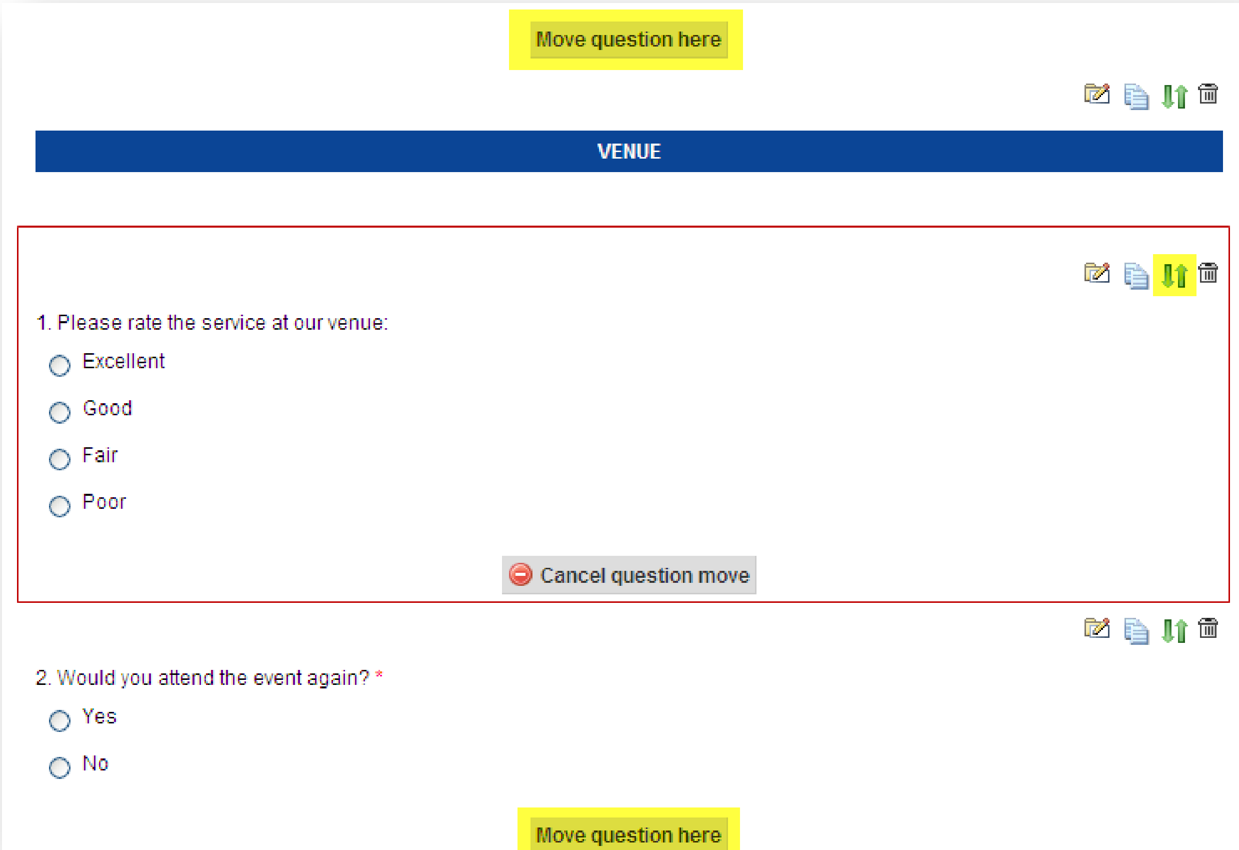
Survey Question Options:

Editing a Question: To edit a question click the edit icon

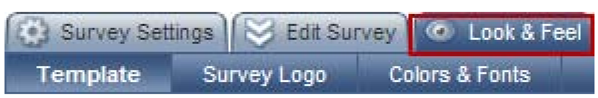
Cloning a question: If you wish to copy a question click the copy icon

Moving a Question: If you wish to rearrange your questions you can click on the green arrows shown in the picture below and place them above or below other existing questions where it states "move question here"

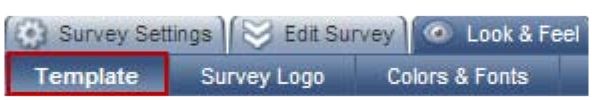
Deleting a Question: To delete a question permanately from a page click on the garbage can icon



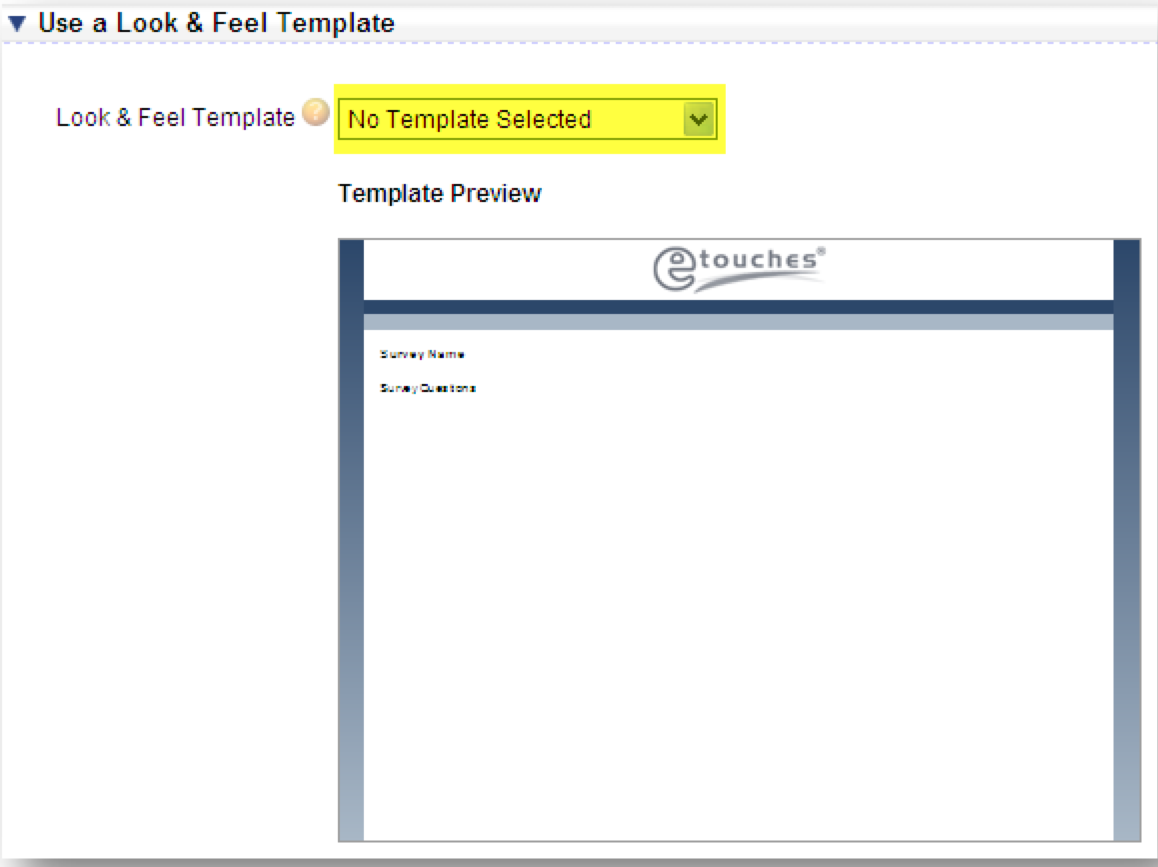
Look and Feel Tab: Within the look and feel tab you can choose and edit templates, logos, colors and fonts.



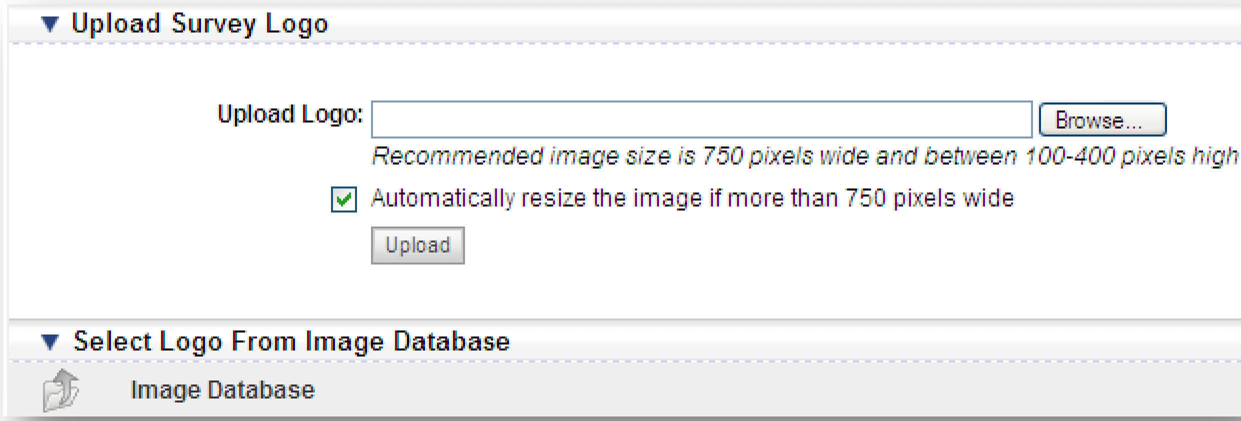
Template: Utlizing the template feature will allow you to choose template that you have created under your account settings keeping a standard look and feel to your surveys.

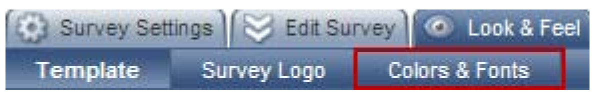


Using a Look & Feel Template: Choose template options from the dropdown selection as shown below.

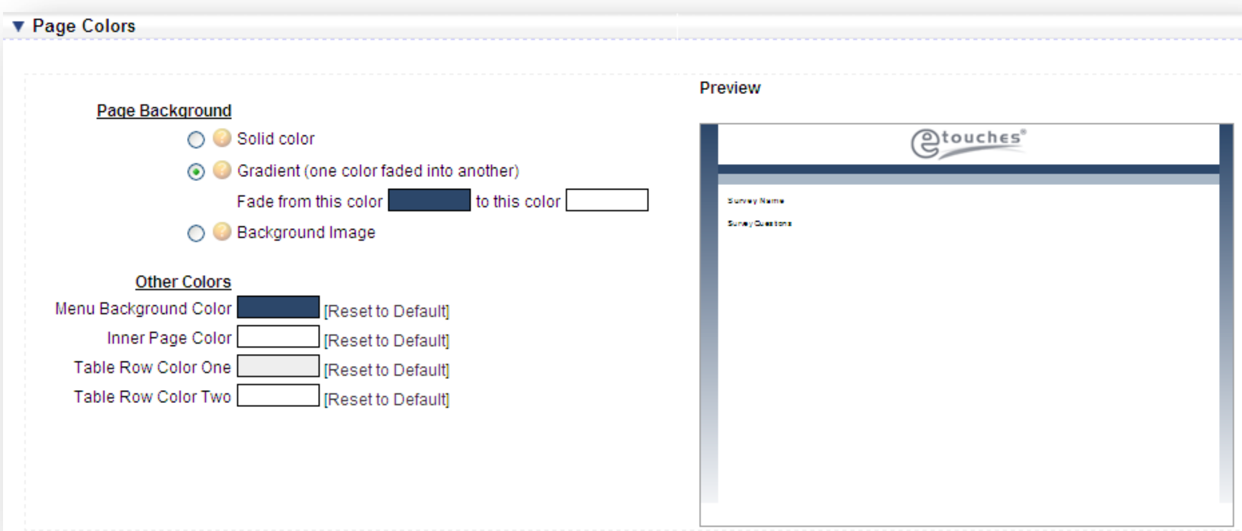


Survey Logo: Here you can upload a logo for your survey or upload one from your image database. The logo will be displayed above everything on the page in your survey.



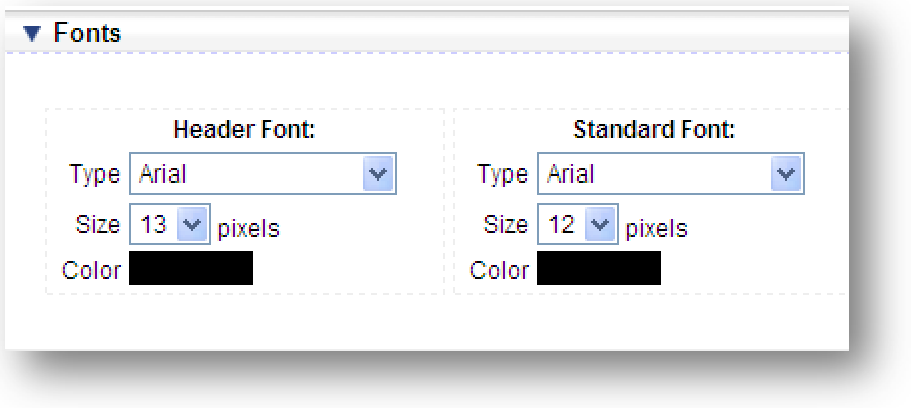


Colors & Fonts: In this section you can edit the background page colors and the font styles of your survey. Any changes made will be shown in the preview of your survey to the right of the page colors.



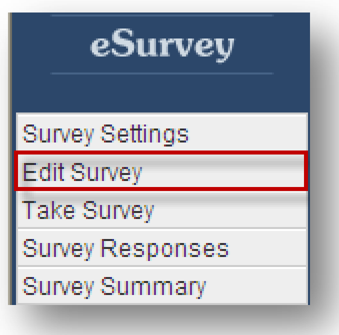
Page Background: Here you can select from one of three options for your page background; either a solid color, gradient, or upload your own background image.

Other Colors: Here you can adjust the menu background colors, and inner page color. Any unwanted changes can be reset to default by clicking the link to the right of the color.

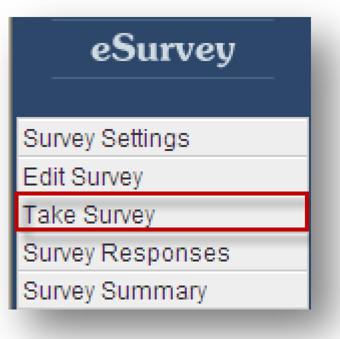


Fonts: Here you can edit the font type, color, and size of both the header and standard font.

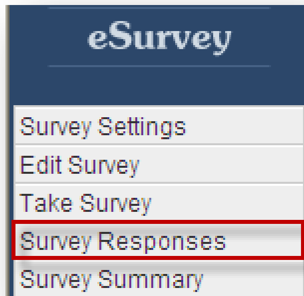
Edit Survey: Clicking this link will allow you to access and edit your survey. This is the same information that is included within the Edit Survey Tab as shown above.

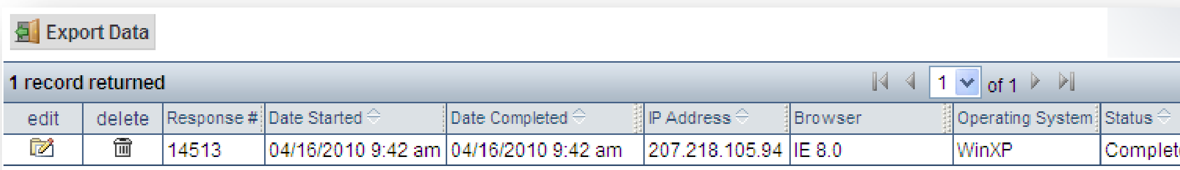


Take Survey: Clicking this link will open the survey and will give you the opportunity to go through the survey process as your attendees would.



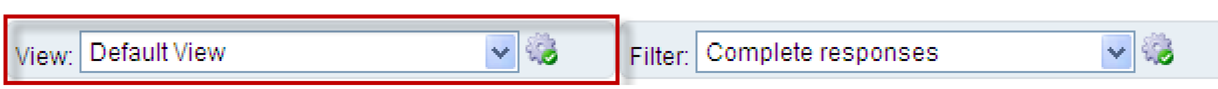
Survey Responses: Clicking this link will open and display the details regarding your survey responses for your survey.



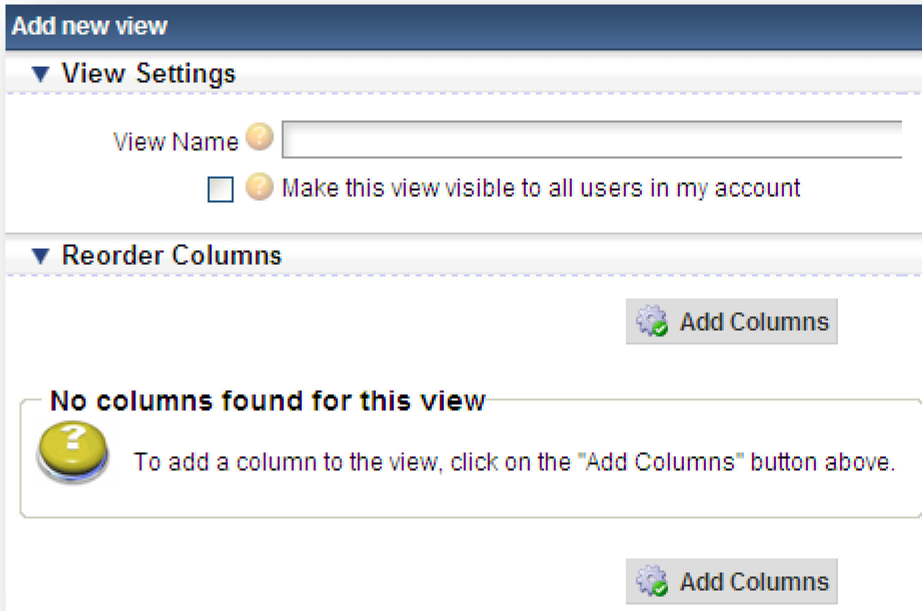


Export Data: To export all of your survey responses to an excel document click the export data button.
Edit: If you would like to edit an attendee's response click the edit icon
Delete: If you would like to delete an attendee's response click the garbage can icon
Response #: This is the response number associated with the attendees' survey response
Date Started: This is the initial date the attendee began the survey
Date Completed: This is the date the attendee completed the survey
IP Address: This is the attendee's IP address from where they completed the survey
Browser: This is the browser used by the attendee when taking that survey
Operating System: This is the Operating System used by the attendee when taking that survey
Status: This is the status of the survey, and will show you if the attendee has completed the survey.

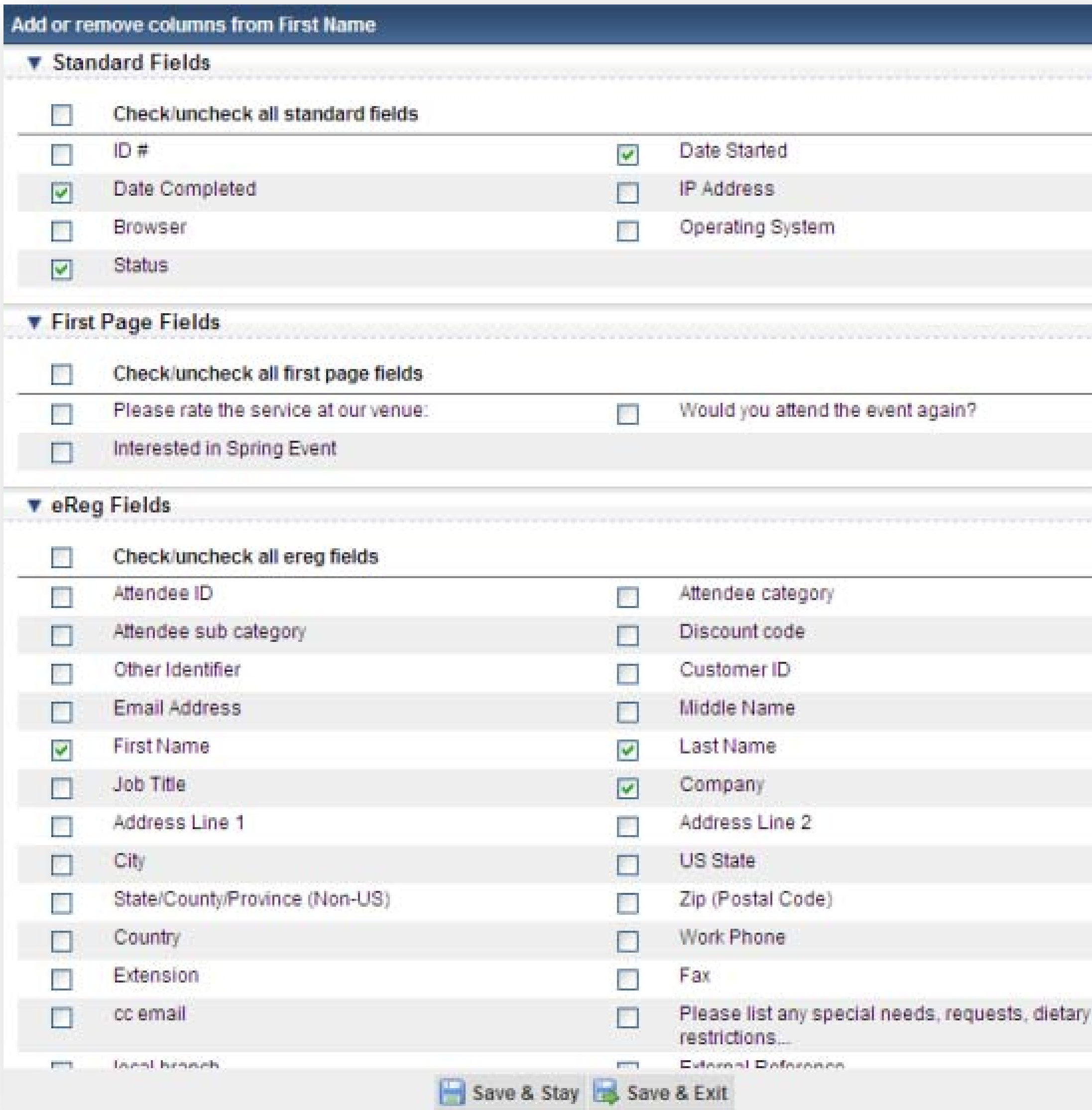
View: Here you can change the view that you see your Survey Reponses listed with.



Adding a New View: To add a new view click the gear icon and select to add a new view. A screen will then appear like the one shown below where you can enter the details of your new view.

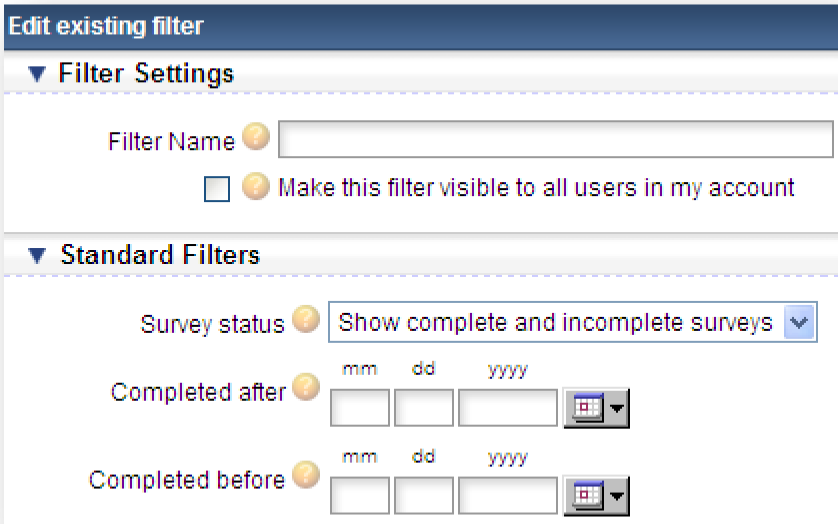


View Name: This is the name of this filter which will appear in your dropdown list when selecting it.
Make this view visible to all users in my account: Check this box if you want this view to be visible to all users in your account. If unchecked then only you will be able to see this view.
Add Columns: To add fields to your custom view click add columns and select from the standard fields and custom fields you have built into your survey that you would like visible on your custom view.

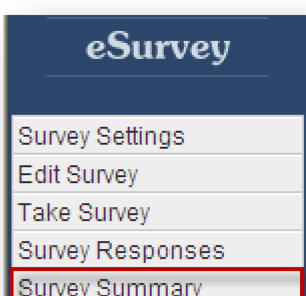


Filter: This feature will allow you to apply filters to your view of your survey responses. From the dropdown you will be able to filter your survey responses based on Complete Reponses, Incomplete Responses, or Add a new filter.

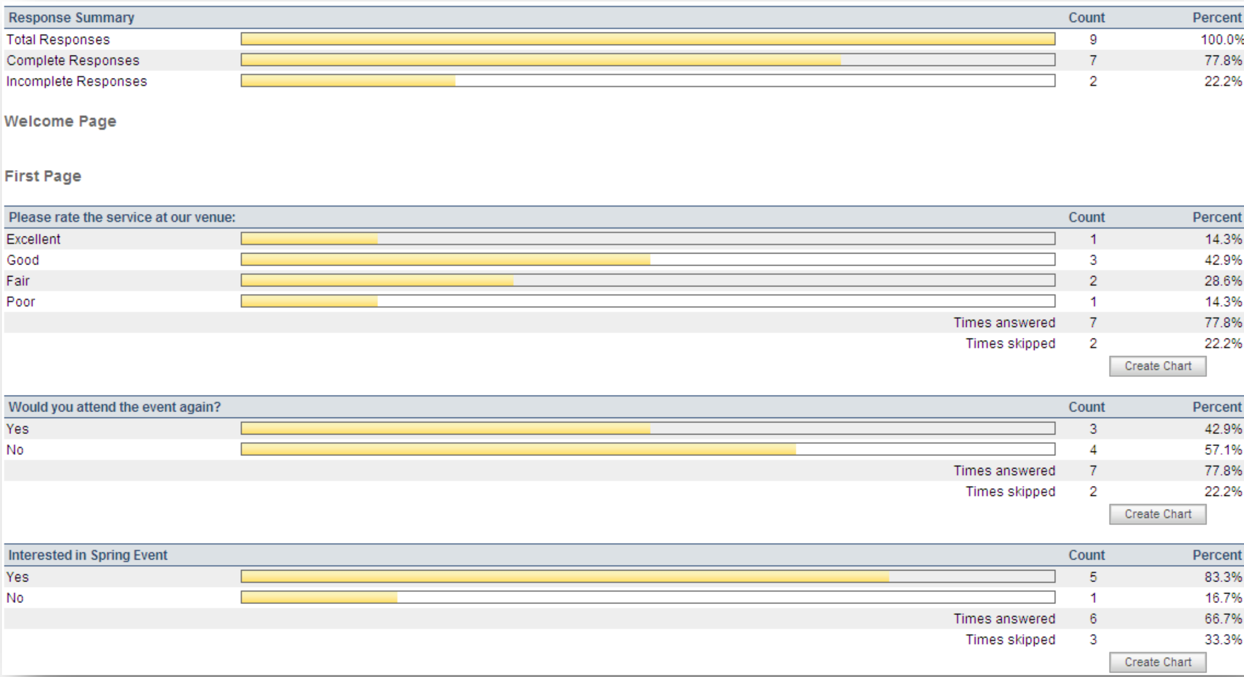
Adding a New Filter: To add a new filter you will want to click the gear icon  and select to add a new filter. A screen will then appear like the one shown below where you can enter the details of your new filter.



Filter Name: This is the name of this filter which will appear in your dropdown list when selecting it.
Make this filter visible to all users in my account: Check this box if you want this view to be visible to all users in your account. If unchecked then only you will be able to see this view.
Survey Status: Here you will select the status of the surveys you want to include in your report.
Completed After: In this field you will enter the date after which the survey must have been completed to be viewed in your report.
Completed Before: In this field you will enter the date which the survey must have been completed to be viewed in your report.



Survey Summary: Clicking this link will open the summary report that displays the responses from your surveys. The answers will be listed in page and question order. You will be able to see how many times each question has been answered by a number count as well as percentage. All information can be exported to excel and any question where data was collected can be converted in a chart.



Response Summary	Count	Percent
Total Responses	9	100.0%
Complete Responses	7	77.8%
Incomplete Responses	2	22.2%

Welcome Page

First Page

Please rate the service at our venue:	Count	Percent
Excellent	1	14.3%
Good	3	42.9%
Fair	2	28.6%
Poor	1	14.3%
Times answered	7	77.8%
Times skipped	2	22.2%

Create Chart

Would you attend the event again?	Count	Percent
Yes	3	42.9%
No	4	57.1%
Times answered	7	77.8%
Times skipped	2	22.2%

Create Chart

Interested in Spring Event	Count	Percent
Yes	5	83.3%
No	1	16.7%
Times answered	6	66.7%
Times skipped	3	33.3%

Create Chart

Create Chart: If you would like to view a survey questions response in a chart view, simply click on create chart under the question of your choice. A chart will then appear like the one shown below with the results from the question responses. Create Chart

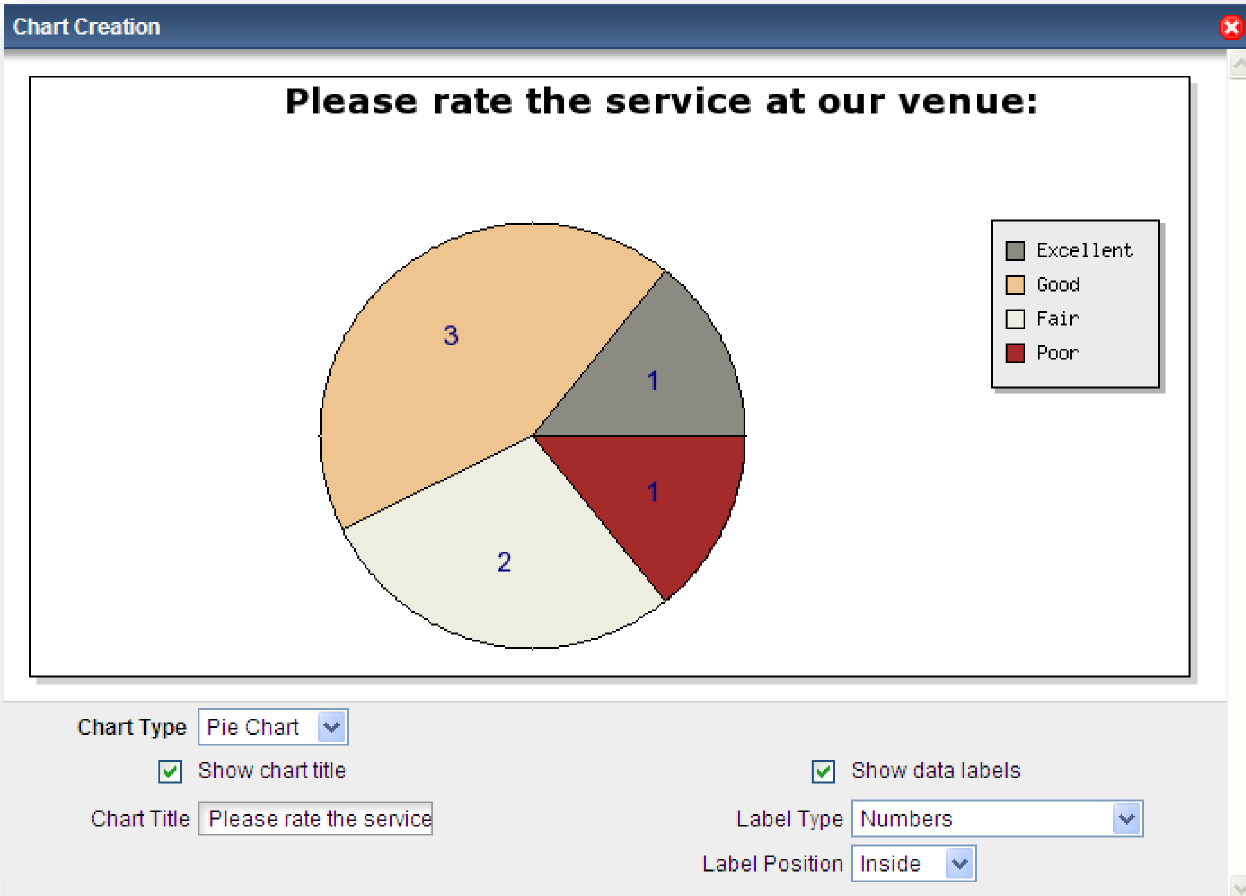
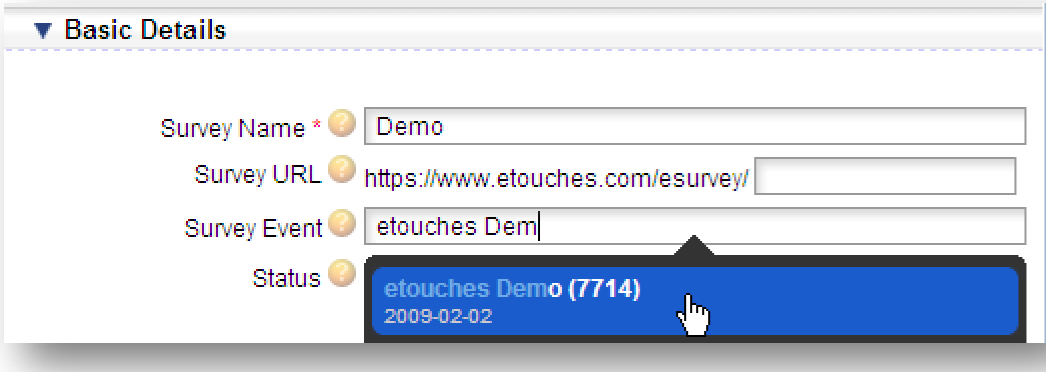


Chart Type: here you will be able to select the type of chart you would like to view. You will be able to choose from a Pie Chart, a Bar Chart, or a Line Chart.
Show Chart Title: By selecting this field the Chart Title will appear above your chart.
Chart Title: If you wish to rename your chart you have the ability to do so here.
Show Data Labels: This will make the total reponses for each answer on your chart visble.
Label Type: This will allow you to choose how you would like the Data to appear on your chart. You will be able to select total number, perctanges, or both.
Label Position: This will allow you to place the total numbers within your chart or outside of your chart.

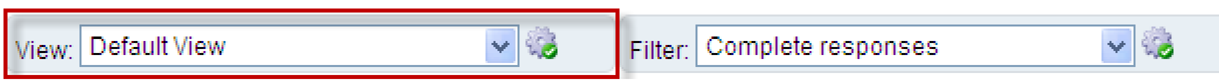
Linking a Survey with an event

Step #1: You will want to link the event in eSurvey by placing the event name or number under the Survey Event Field in your survey settings.

Survey Event: Here you can list the name or event number that this survey is collecting feedback for. Please note that this field is case sensitive and will not link unless the name entered matches exactly to the etouches event name.



Step #2: You will want to ensure that you have a custom view setup so that you will be able to see the information that is pulled from eReg into your survey. To setup a custom view please see page 14 of this manual.



Step #3: In order to direct your attendees from your event to take your survey you will want to email them a link to urge them to take your survey. Therefore you will want to create a custom email in eReg and include one of the merge code below.

(1.) */esurvey_url/*
This merge code that will produce a URL of a page listing all the eSurveys related to this event

(2.) */esurvey_link/*
This merge code will link to a page listing all the eSurveys related to this event.

Using one of these custom merge codes will then direct your attendees to your survey where they will be able to give their input based on your survey questions. Once attendees have completed the survey you then can visit the survey reponses within eSurvey and the attendees data that you have added in your custom view will be pulled in from your eReg event to eSurvey.

11 records returned

Attendee ID	First Name	Last Name	delete	edit
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		
[illegible]	[illegible]	[illegible]		