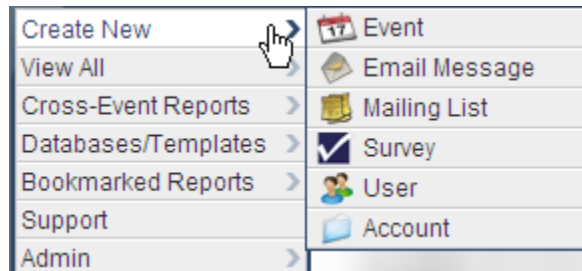


eSurvey Manual

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.

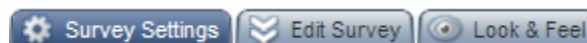


After clicking “Survey,” a new window will open asking for brief details of the survey, such as the name, account and folder.

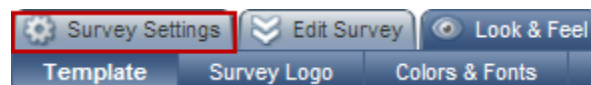
A screenshot of the 'Create Survey' form. It has a dark blue header with the text 'Create Survey'. Below the header, there are four input fields: 'Survey Name *' with a yellow question mark icon and a text input field containing 'Name of Survey Here'; 'Survey URL' with a yellow question mark icon and a text input field containing 'https://www.etches.com/esurvey/'; 'Account' with a yellow question mark icon and a dropdown menu showing 'Demo Account'; and 'Folder' with a yellow question mark icon and a dropdown menu showing 'None'.

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”.

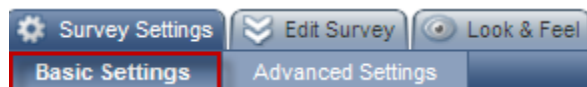
Once your survey has been created, you will be able to edit your survey in sections using the tabs across the top of the page. These tabs are explained in detail below.



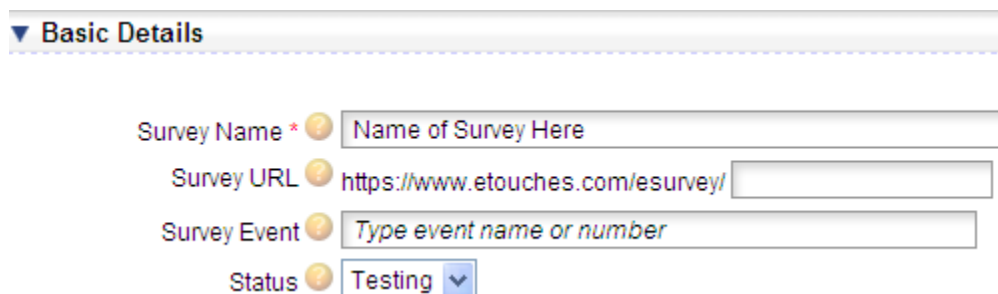
Survey Settings Tab: Within the Survey Settings Tab you can edit your Basic Settings and Advanced Settings.



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:

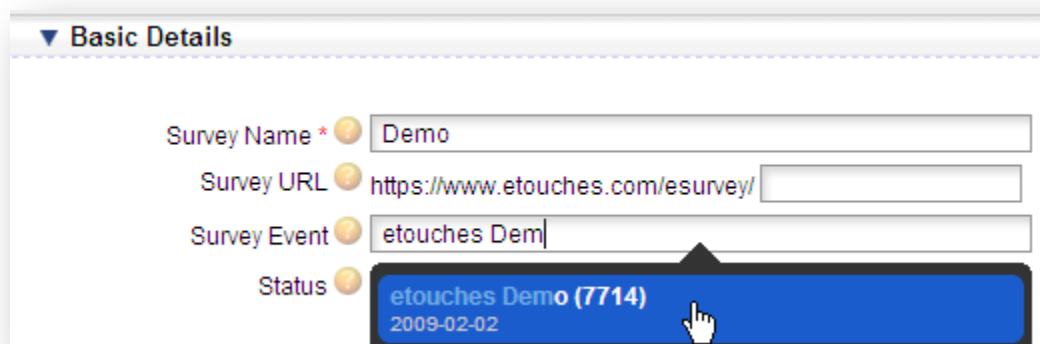


Survey Name: Here you can edit the name of your survey

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:

▼ Question Numbering

☒ Use question numbering

☒ Number each page of questions separately

☐ Number questions over entire survey

Use Question Numbering: If you use question numbering then your survey questions will automatically be numbered 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:

▼ Thank you page

Upon completion  ☒ Redirect to standard eSurvey thank you page

☐ Redirect to another website

☐ Redirect to the public summary report

Message  Thank you for taking the time to complete this survey.

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:

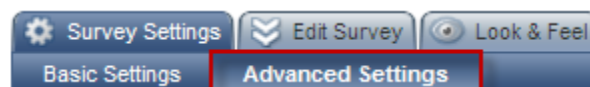
▼ Public summary report

☒ ? Make a summary of the survey results publicly available

The public summary report can be found at <https://www.eiseverywhere.com/esurvey/results/10335>.

Password (optional) ?

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.

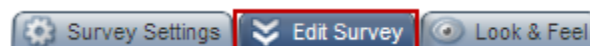
▼ Advanced Settings

☒ ? Automatically change registrant's status in eReg when survey is completed

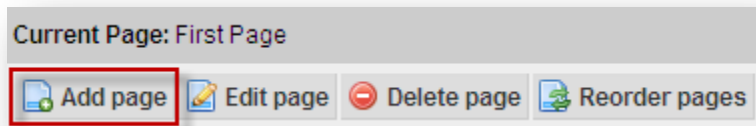
Change status to ? ▼

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

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:

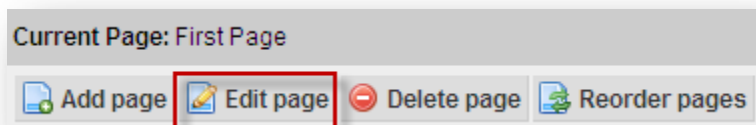
A screenshot of the 'Add page to survey' form. The title bar says 'Add page to survey'. Below it is a section titled 'General Settings' with a dropdown arrow. There are three fields: 'Name' with a question mark icon and an empty text box; 'Position' with a question mark icon, a dropdown menu showing 'At end of survey', and a downward arrow; and 'Notes' with a question mark icon and a large text area with up and down arrows on the right side.

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

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



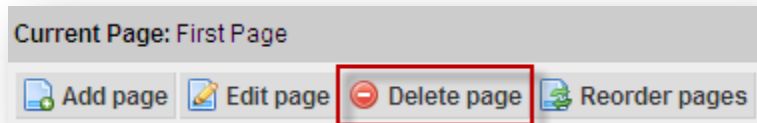
Edit Page> General Settings:

A screenshot of the 'Edit page' form. The title bar says 'Edit page'. Below it is a section titled 'General Settings' with a dropdown arrow. There are two fields: 'Name' with a question mark icon and a text box containing 'First Page'; and 'Notes' with a question mark icon and a large text area with up and down arrows on the right side.

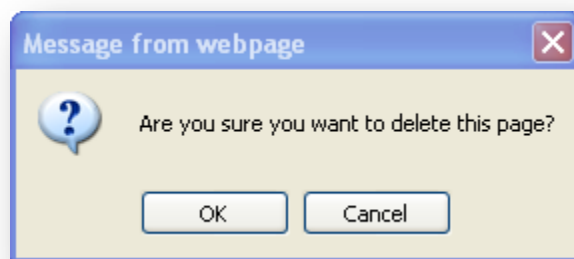
Name: This is the name of the page you are editing

Notes: These notes are for internal purpose, to help you and your colleagues identify the page

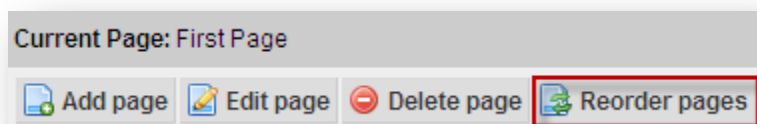
Delete Page: Shown in the screen shot below is where you can select to delete a page to your survey



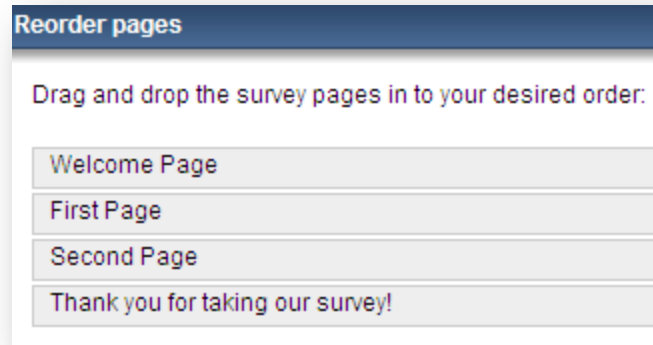
Delete Page: Selecting delete page will delete the current page you are on. The system will prompt you below to verify if you would like to delete this page.



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 reorder 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 appear in.

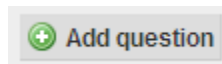


Reorder pages

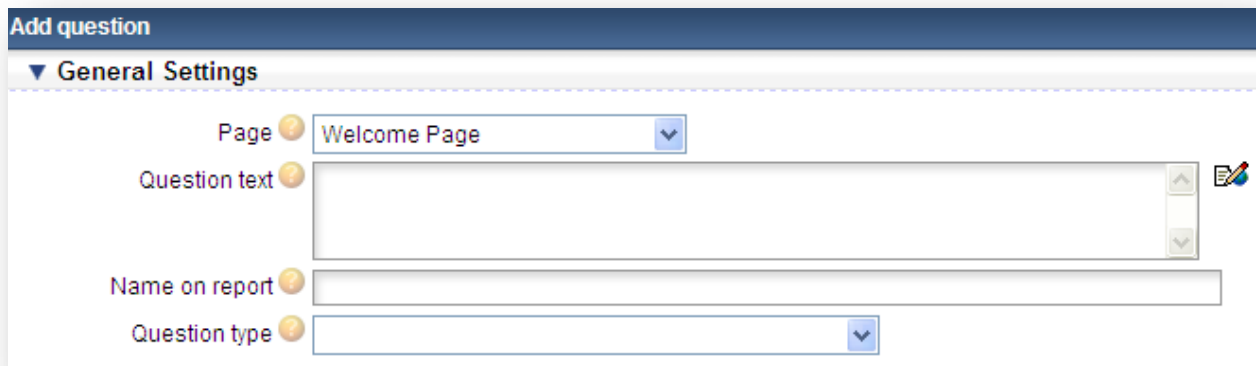
Drag and drop the survey pages in to your desired order:

- Welcome Page
- First Page
- Second Page
- Thank you for taking our survey!

Adding a survey question:









Add Question > General Settings:






Add question

▼ **General Settings**

Page  Welcome Page 

Question text    

Name on report 

Question type  

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 → Multiple lines available for survey response
- Comments → Multiple 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
- Matrix Radio Buttons → One answer per row (See below for additional info on Matrix Setup)

- Matrix 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.

The screenshot shows the 'Question Logic' section. It features a dropdown menu labeled 'Select question' and a dropdown menu labeled 'is equal to'. To the right of these is a text input field. Below these elements is a button labeled 'Add Logic'. Above the input field, there is a text label 'Display this question when' followed by a dropdown menu showing 'all of' and the text 'the following conditions are met:'.

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:

The screenshot shows the 'Matrix Setup' interface. It is divided into three main sections: 'General Settings', 'Row Choices', and 'Column Choices'.

General Settings:

- Page:** A dropdown menu showing 'First Page'.
- Question text:** A text input field containing 'Please rate our conference sessions:'.
- Name on report:** A text input field.
- Question type:** A dropdown menu showing 'Matrix of Radio Buttons (one answer per row)'.
- Question is:** Two checkboxes, 'Visible' (checked) and 'Required' (unchecked).

Row Choices:

- A table with two rows:


Choice Label	Session 1	
Choice Label	Session 2	
- Buttons: 'Add Choice' and 'Import Choices'.
- Checkbox: 'Randomize the order of the choices' (unchecked).

Column Choices:

- A table with three rows:


Column Label	Excellent	Weight:	1	
Column Label	Good	Weight:	2	
Column Label	Poor	Weight:	3	
- Buttons: 'Add Column' and 'Import Columns'.


Matrix Question displayed on Survey:





	Excellent	Good	Poor
Session 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Session 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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 permanently from a page click on the garbage can icon 

Move question here

VENUE

1. Please rate the service at our venue:

☐ Excellent

☐ Good

☐ Fair

☐ Poor

Cancel question move

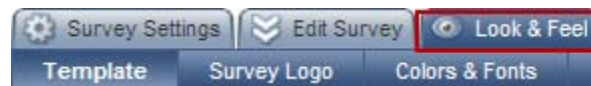
2. Would you attend the event again? *

☐ Yes

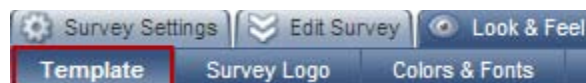
☐ No

Move question here

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



Template: Utilizing 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.

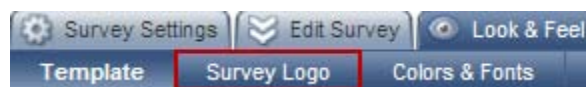
▼ Use a Look & Feel Template

Look & Feel Template No Template Selected

Template Preview

Survey Name

Survey Questions



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.


▼ Upload Survey Logo

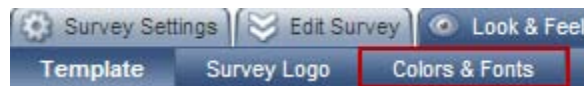
Upload Logo:

Recommended image size is 750 pixels wide and between 100-400 pixels high

☒ Automatically resize the image if more than 750 pixels wide

▼ Select Logo From Image Database

 Image Database



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 Colors

Page Background

☐ Solid color

☒ Gradient (one color faded into another)

Fade from this color to this color

☐ Background Image

Other Colors


Menu Background Color

Inner Page Color

Table Row Color One

Table Row Color Two

Preview

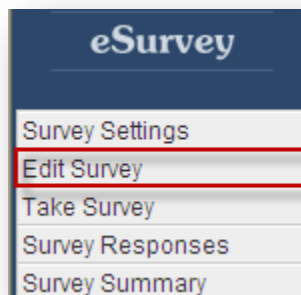


Page Background: Here you can select from one of three options for your page background; either a solid color, gradient, or upload your own background image.

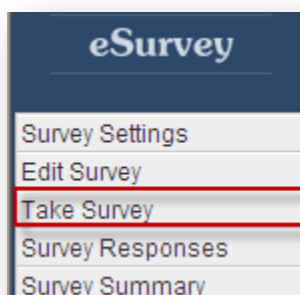
Other Colors: Here you can adjust the menu background colors, and inner page color. Any unwanted changes can be reset to default by clicking the link to the right of the color.

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

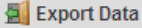
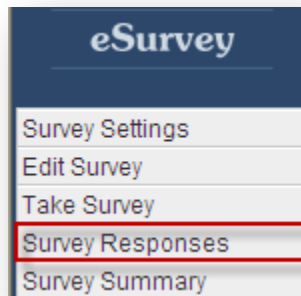
Edit Survey: Clicking this link will allow you to access and edit your survey. This is the same information that is included within the Edit Survey Tab as shown above.





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.



1 record returned

edit	delete	Response #	Date Started	Date Completed	IP Address	Browser	Operating System	Status
		14513	04/16/2010 9:42 am	04/16/2010 9:42 am	207.218.105.94	IE 8.0	WinXP	Complete

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

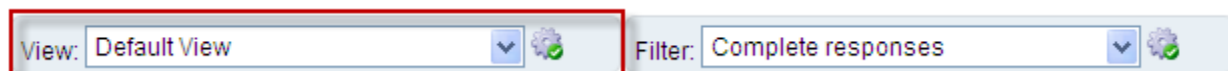
IP Address: This is the attendee's IP address from where they completed the survey


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 Responses 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.


Add new view

▼ View Settings


View Name 

☐  Make this view visible to all users in my account


▼ Reorder Columns

 Add Columns

No columns found for this view



To add a column to the view, click on the "Add Columns" button above.

 Add Columns

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.

Page | 15

Add or remove columns from First Name

▼ Standard Fields

☐ Check/uncheck all standard fields

☐ ID #
☒ Date Started

☒ Date Completed
☐ IP Address

☐ Browser
☐ Operating System

☒ Status

▼ First Page Fields

☐ Check/uncheck all first page fields

☐ Please rate the service at our venue:
☐ Would you attend the event again?

☐ Interested in Spring Event

▼ eReg Fields

☐ Check/uncheck all ereg fields

☐ Attendee ID
☐ Attendee category

☐ Attendee sub category
☐ Discount code

☐ Other Identifier
☐ Customer ID

☐ Email Address
☐ Middle Name

☒ First Name
☒ Last Name

☐ Job Title
☒ Company

☐ Address Line 1
☐ Address Line 2

☐ City
☐ US State

☐ State/County/Province (Non-US)
☐ Zip (Postal Code)

☐ Country
☐ Work Phone

☐ Extension
☐ Fax


☐ cc email
☐ Please list any special needs, requests, dietary restrictions...

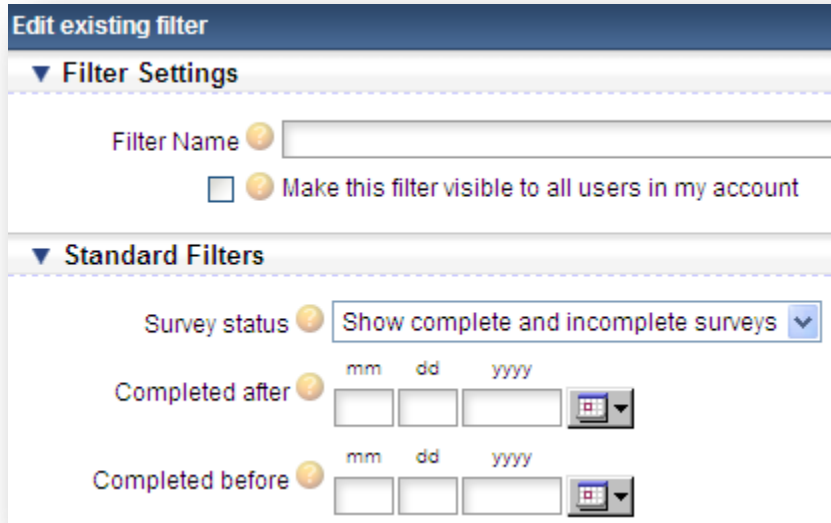
☐ Local branch
☐ External Reference

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 Responses, Incomplete Responses, or Add a new filter.

View: Default View

Filter: Complete responses

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.



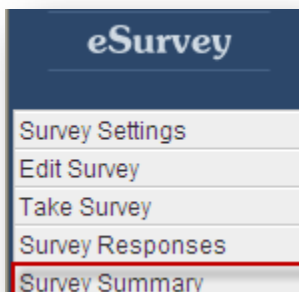
Filter Name: This is the name of this filter which will appear in your dropdown list when selecting it.

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	<div><div></div></div>	9	100.0%
Complete Responses	<div><div></div></div>	7	77.8%
Incomplete Responses	<div><div></div></div>	2	22.2%
Welcome Page			
First Page			
Please rate the service at our venue:		Count	Percent
Excellent	<div><div></div></div>	1	14.3%
Good	<div><div></div></div>	3	42.9%
Fair	<div><div></div></div>	2	28.6%
Poor	<div><div></div></div>	1	14.3%
		Times answered	7 77.8%
		Times skipped	2 22.2%
		Create Chart	
Would you attend the event again?		Count	Percent
Yes	<div><div></div></div>	3	42.9%
No	<div><div></div></div>	4	57.1%
		Times answered	7 77.8%
		Times skipped	2 22.2%
		Create Chart	
Interested in Spring Event		Count	Percent
Yes	<div><div></div></div>	5	83.3%
No	<div><div></div></div>	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](#)

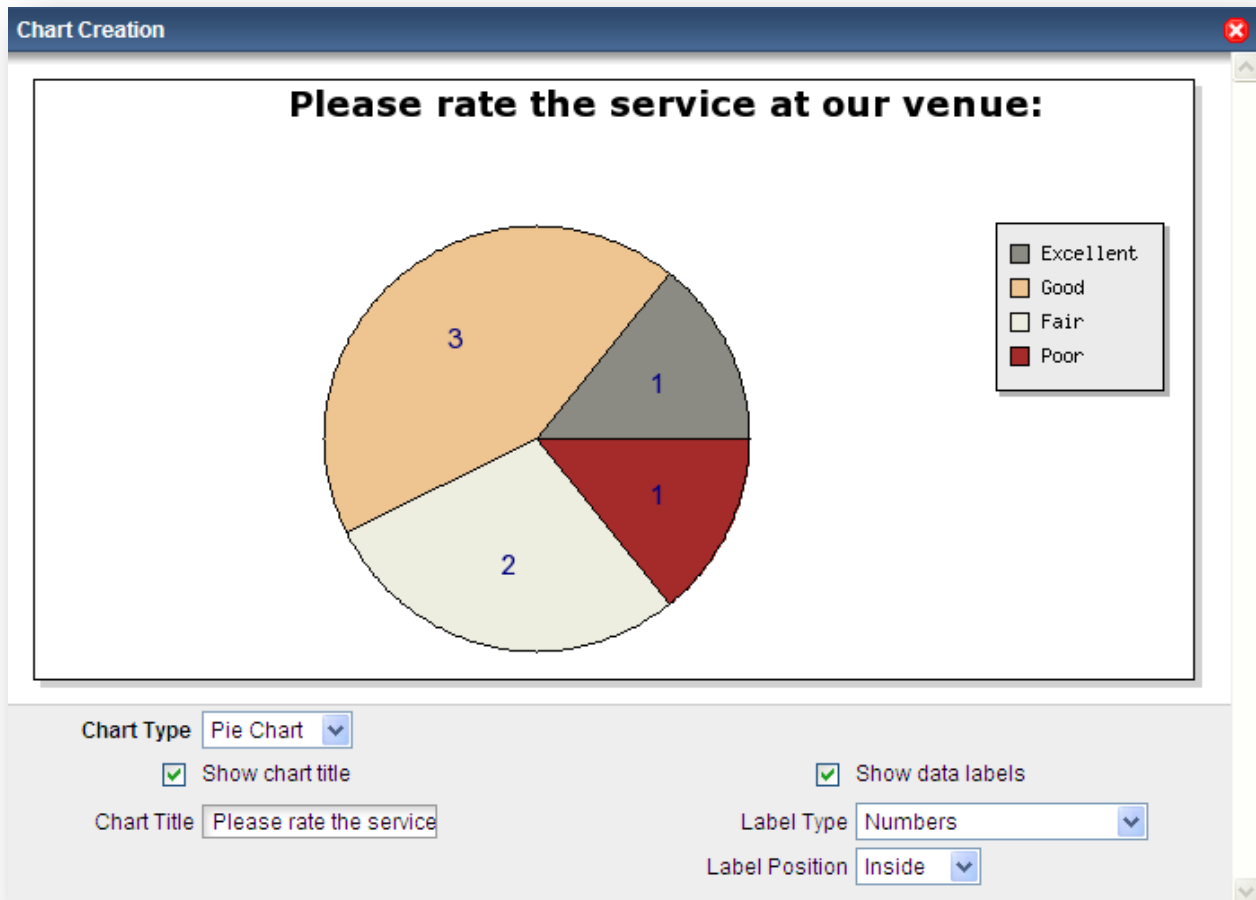


Chart Type: here you will be able to select the type of chart you would like to view. You will be able to choose from a Pie Chart, a Bar Chart, or a Line Chart.

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 responses for each answer on your chart visible.

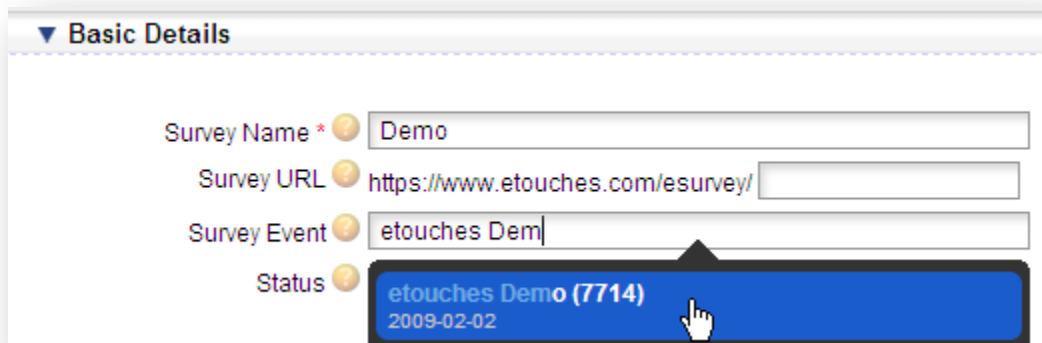
Label Type: This will allow you to choose how you would like the Data to appear on your chart. You will be able to select total number, percentages, or both.

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.



▼ Basic Details

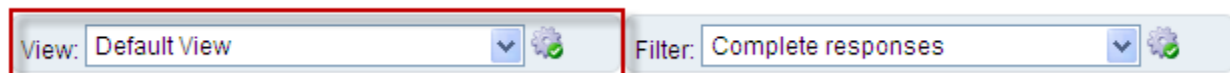
Survey Name *

Survey URL

Survey Event

Status

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.



View: Filter:

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 responses 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
1000000	John	Smith		
1000001	John	Smith		
1000002	John	Smith		
1000003	John	Smith		
1000004	John	Smith		
1000005	John	Smith		
1000006	John	Smith		
1000007	John	Smith		
1000008	John	Smith		
1000009	John	Smith		
1000010	John	Smith	