**Survey Genie User Manual**

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**1. Getting Started**

**System Requirements**

* Operating System: Windows 10 or later, macOS 10.13 or later
* Browser: Latest version of Chrome, Firefox, Safari, or Edge
* Internet Connection: Stable broadband connection

**Installation**

Survey Genie is a web-based application, so there is no need for installation. Simply visit <https://alumni.thejourney36.com/apps/view/survey-genie> to get started.

**Registration**

Upon registering your organisation with Alumni Services via the “Clients” application, a user ID and password will be generated and sent to you by E-mail. Please use this credentials to login to the Survey Genie application

**2. Overview of the Interface**

**User classification**

Within Survey Genie, users are classified into 3 types based on their roles:

* Super-Admin: An employee from Alumni Service who will be accessing all dashboards, has complete control Survey creation and assignment.
* External Admin: The admin of the external organisation that is trying to gain insights by using survey genie
* External Employee: The employee of the external organisation who will respond to the survey assigned to them.

Based on this classification, the access is differentiated in the application.

**Screens offered:**

The following table shows the screens mapped to the specific roles.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Super admin** | **External Admin** | **External Employee** |
| Admin Dashboard | ✓ | ✓ |  |
| Employee Dashboard |  |  | ✓ |
| Categories | ✓ |  |  |
| Question | ✓ |  |  |
| Survey | ✓ |  |  |
| Organisations | ✓ |  |  |
| My Survey | ✓ | ✓ | ✓ |
| Attempted Survey | ✓ | ✓ | ✓ |
| Benchmark Report | ✓ | ✓ |  |
| Organisation Report | ✓ | ✓ |  |

**Dashboard**

The dashboard is your main hub for navigating Survey Genie. Here you can:

* View recent surveys
* Access analytics

**Manage**

This section allows you to create the masters to begin making surveys. This section consists of:

* Categories
* Questions
* Survey
* Organizations

**Account**

The account section has the access that all users have to their surveys. This section contains:

* My Survey
* Attempted Surveys

**Reports**

This section has the organisation and benchmark report that can be used by Super admin and external admin users to avail insights from the surveys

**Recommendation**

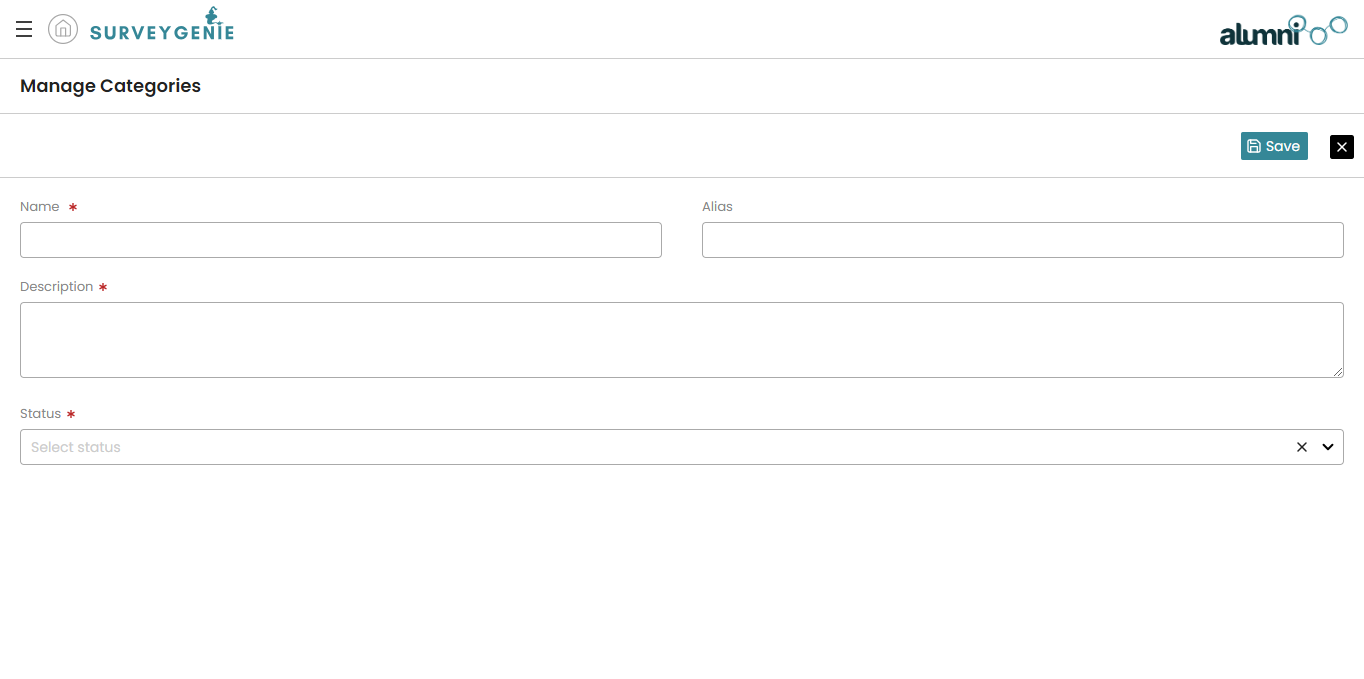
Manage your existing surveys by editing, copying, or deleting them from this section.

**3. Creating a Survey**

Before we create a survey, there are certain sub-masters to be created to support the survey.

**Guide to create CATEGORY**

1. Click on "Categories" under “Manage”.
2. Click on the “New” button above the grid.
3. Enter the name, alias name, description, and status(“active”, “inactive”)
4. Click on “Save” button.



**Guide to create SUB-CATEGORY:**

1. Click on "Categories" under “Manage”.
2. Click on the edit icon against the category that you want to map the sub-category to.
3. Click on the “sub-categories” tab and a grid will be shown.
4. Click on the “new” button above the grid.
5. Enter the name, description, and status(“active”, “inactive”)
6. Click on the “Submit”



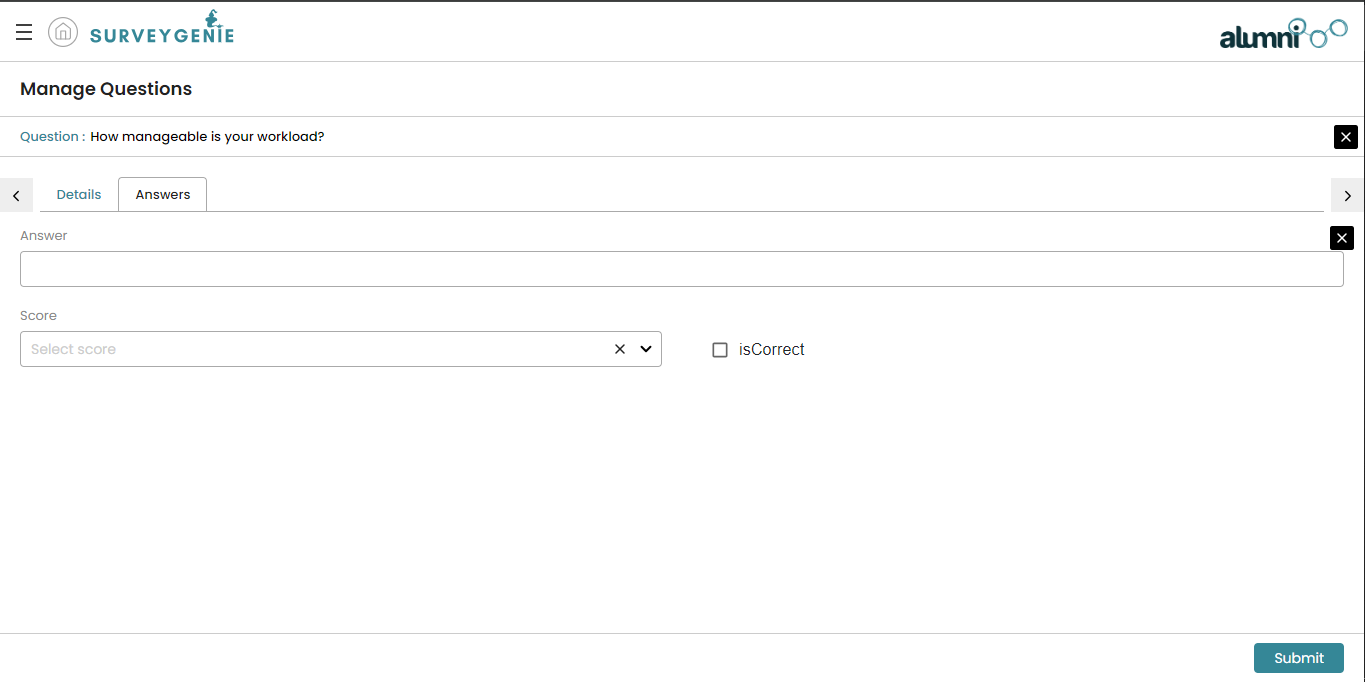
**Guide to create Question:**

1. Click on "Questions" under “Manage”.
2. Click on the “New” button above the grid.
3. Enter the category against which the question is to be mapped.
4. Enter the sub-category against which the question is to be mapped.
5. Enter the type as single choice.
6. Enter the question.
7. If the question is mandatory, tick the isRequired checkbox.
8. Click on “Save” to save your question.



**Guide to create Answer:**

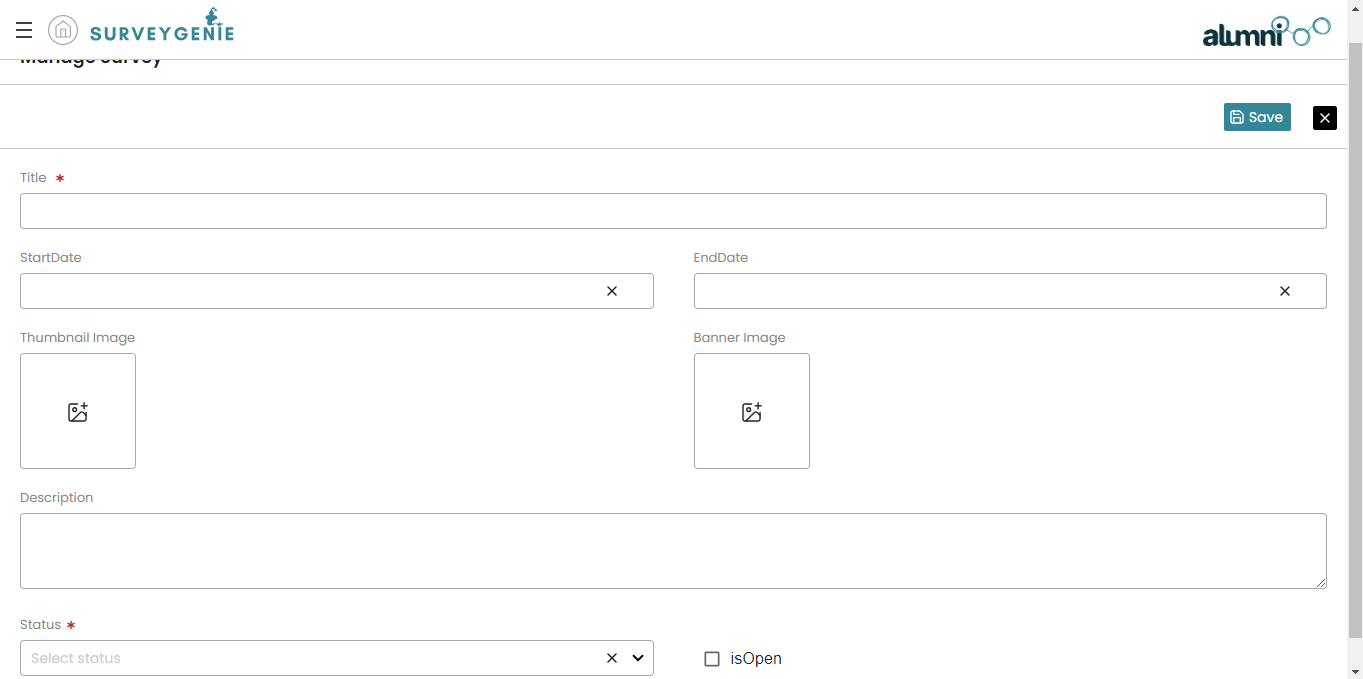
1. Click on "Questions" under “Manage”.
2. Click on the edit icon against the question that you want to map the answer to.
3. Click on the “Answers” tab and a grid will be shown.
4. Click on the “new” button above the grid.
5. Enter the Answer and score that you want to assign to the answer
6. If you want to assign the answer as correct, tick the isCorrect checkbox



**Now that we have created all the required sub-masters, let’s create the survey**

**Guide to create Survey:**

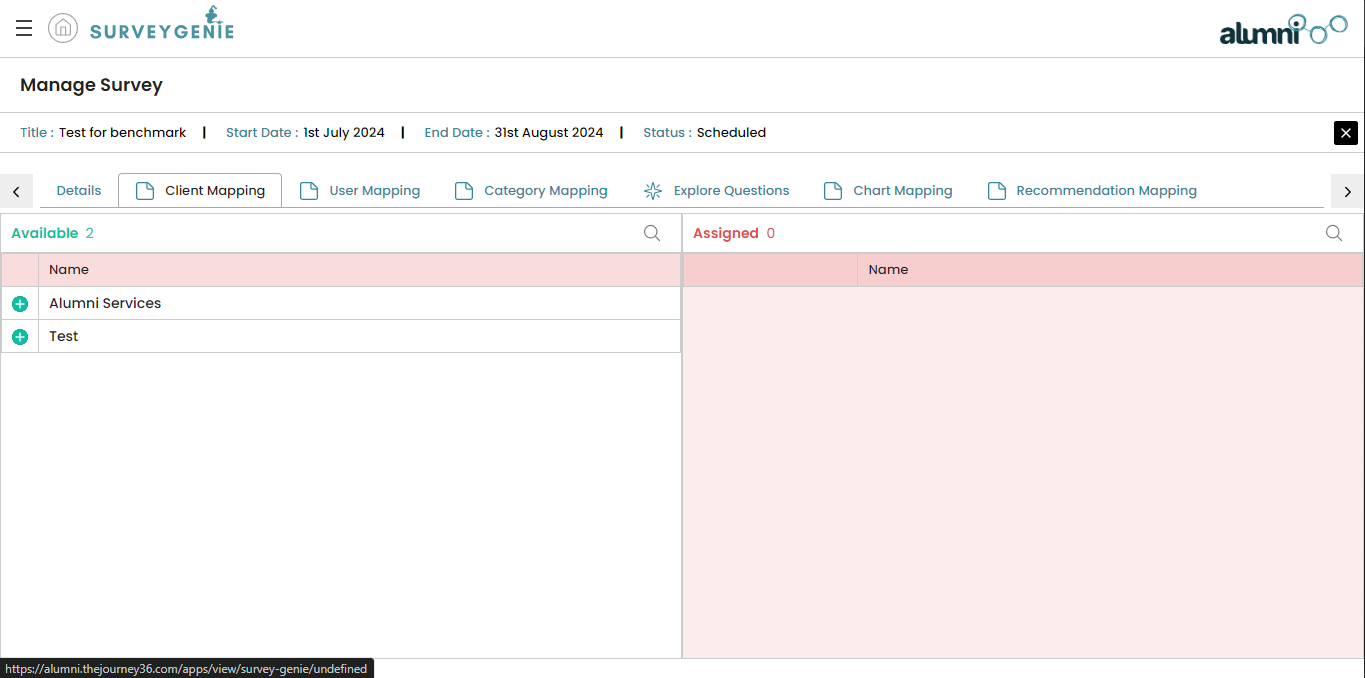
1. Click on "Survey" under “Manage”.
2. Click on the “New” button above the grid.
3. Enter the Title, start date, end date, description and the status of the survey.
4. Attach the thumbnail image and banner image for the survey to display it at the beginning of the survey when it is attempted.
5. Click on “Save” to save your Survey.



**Now, we will have to map the questions, clients and users to the survey to provide access to the users.**

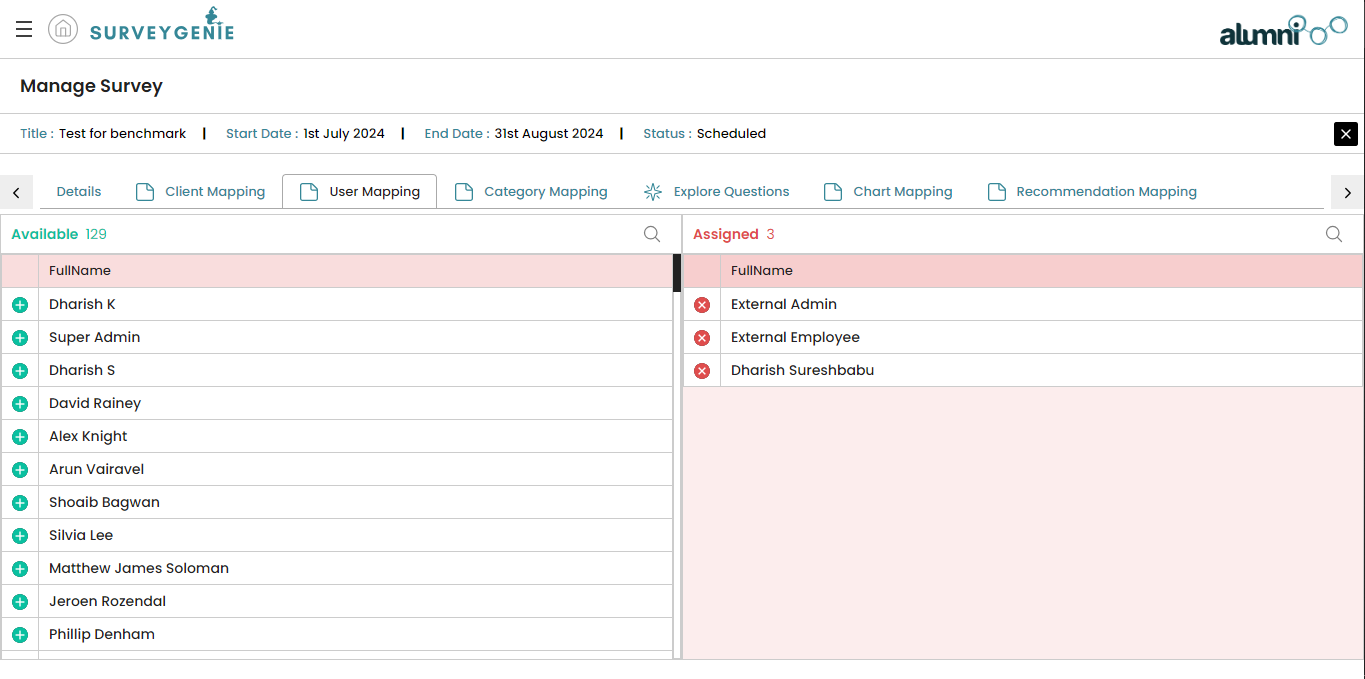
**Guide to Survey-Client mapping:**

1. Click on "Survey" under “Manage”.
2. Click on the edit icon against the survey that you want to configure.
3. Click on the client mapping tab to access the mapping screen.
4. Click the plus icon against the Name of the client to assign the survey to all users of that client.



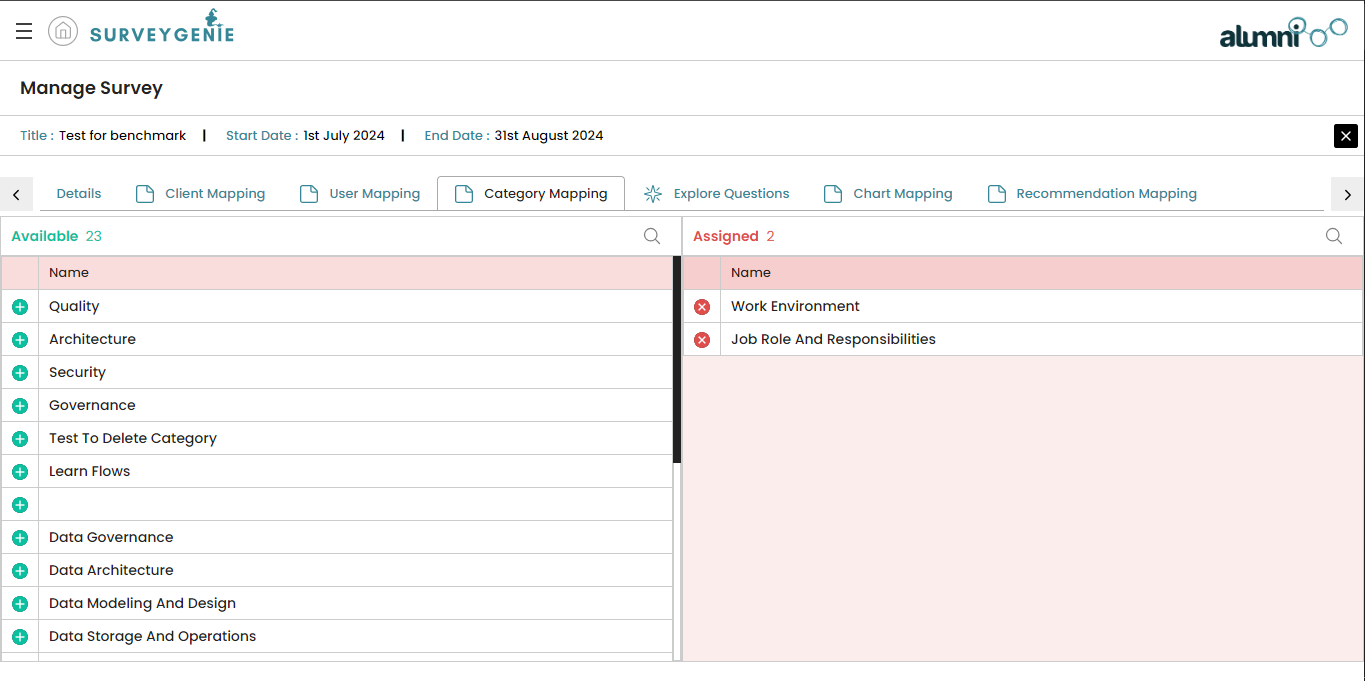
**Guide to Survey-User mapping:**

1. Click on "Survey" under “Manage”.
2. Click on the edit icon against the survey that you want to configure.
3. Click on the user mapping tab to access the mapping screen.
4. Click the plus icon against the Name of the user to assign the survey to users that are not mapped by client mapping.



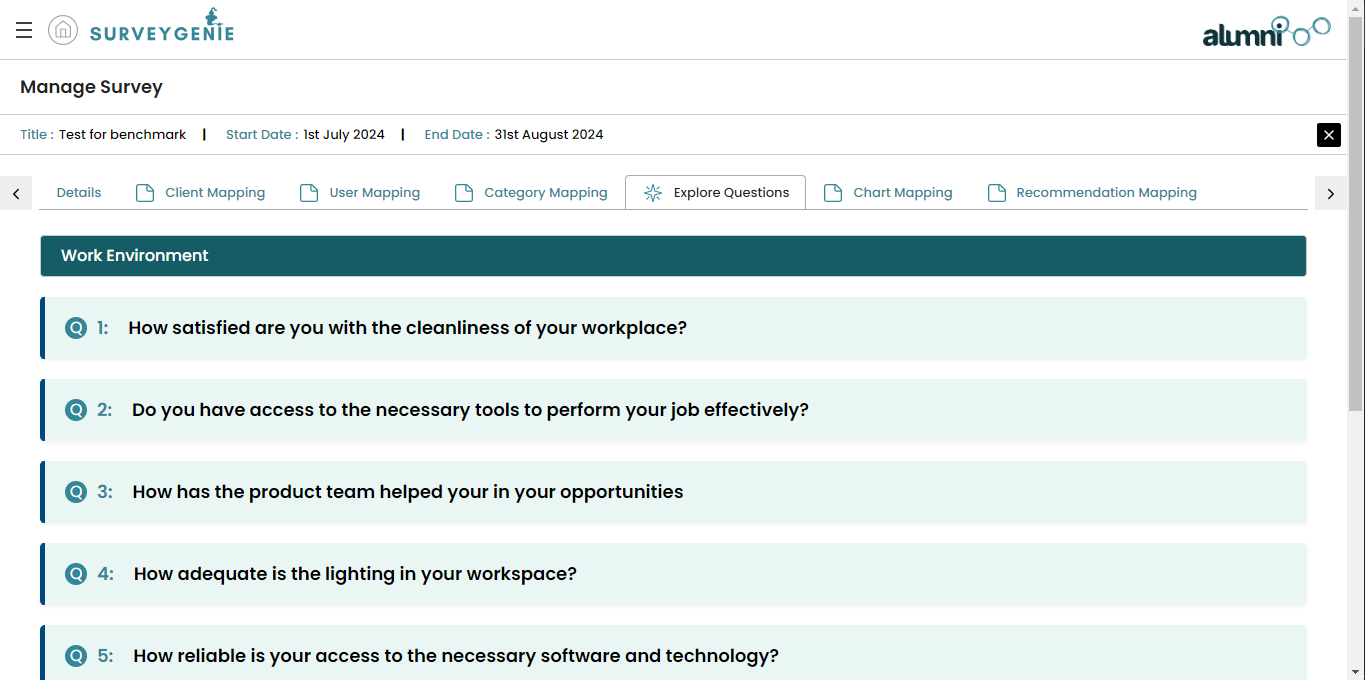
**Guide to Survey-Category mapping:**

1. Click on "Survey" under “Manage”.
2. Click on the edit icon against the survey that you want to configure.
3. Click on the category mapping tab to access the mapping screen.
4. Click the plus icon against the category to assign the questions to the survey. The questions mapped to the category will be displayed while attempting the survey.



**Guide to check questions mapped to Survey:**

1. Click on "Survey" under “Manage”.
2. Click on the edit icon against the survey that you want to configure.
3. Click on the explore questions tab to view the questions mapped to the survey via the category mapping action.



**4. Distributing Your Survey**

**Distribution Methods**

* Email Invitations

**Tracking Responses**

Monitor response rates and view real-time data through the dashboard.

**5. Analyzing Results**

**Viewing Responses**

Access individual and aggregate responses through the "Responses" tab.

**Exporting Data**

Export survey data in various formats (CSV, PDF, Excel) for further analysis.

**6. Account Settings**

**Profile Management**

Update your personal information and change your password from the "Profile" section.