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CHAPTER 1: GETTING STARTED

OVERVIEW

In order to get Ultimate Survey Advanced up and running, you must first install and configure the application on your web server. This chapter covers all the basics and will help you get started quickly.

REQUIREMENTS & RECOMMENDED CONFIGURATION

Ultimate Survey Advanced is 100% script based; no DLLs or other objects are required to be installed on the web server with the exception of a mail object if your web server does not already have one available.

In order to run Ultimate Survey Advanced on your server, you must meet the minimum system requirements:

- Web Server running Microsoft Internet Information Server version 4.0 or above with full support for Active Server Pages (ASP).
- Microsoft Access 97 or above OR SQL Server 97 or above.
- CDONTS, AspMail, or Jmail components for email functionality. IIS includes CDONTS.
- Microsoft Internet Explorer 4.0 or higher or Netscape 4.0 or higher.

For best performance, we recommend the following configuration:

- Web server running Microsoft Internet Information Server version 5.0 or higher.
- Microsoft SQL Server 2000 or higher.
- CDONTS for email (This is the built in Microsoft mail component. Most hosts provide this by default, but there are some that do not)

INSTALLATION

There are three parts to installing Ultimate Survey on your web server: web server setup, database setup, and application configuration. Please follow the sections below in order to make sure that the application is installed properly.

If you do not wish to perform the installation yourself, Ultimate Software Designs provides professional installation services for an additional fee. Please visit our web site for more information.

Web Server Setup

A) Setting up the files. Unzip the files to a directory on the web server. If necessary, create a virtual directory to point to the application's root directory. Note: this document assumes that it will be installed in a directory called "UltimateSurvey" but you may change it.

The directory structure for the application is:

UltimateSurvey – Contains .asp files that display allow for creating, taking, and reporting on surveys.

- Include – Contains all include files (_inc.asp extension)
  - Stylesheet – Contains style sheets (CSS) for application.
- Images – Contains all images
  - Upload - Folder to hold all uploaded images
- Help – Contains all help files for the online help system.
- Database – Contains the SQL script needed to install the application on a Microsoft SQL Server database. A configured MS Access database is also included in this folder.

B) Default Document. The home page of the application is called default.asp. Your IIS web server should already be configured to use this page as one of the defaults. If not, either configure your web server to search for "default.asp" as a default page, or rename the home page to a file name that is used in the default file list for your web server.

C) Setting folder permissions. You will have to set the anonymous IIS user to have "write" permissions on the folder that will contain your uploaded images (/Images/Upload by default), if you wish to upload images for surveys.

Database Setup

At this point, you must decide whether to use Microsoft SQL Server or Microsoft Access. Choose your database and follow the corresponding instructions below:

Ultimate Software Designs recommends the use of SQL Server for maximum performance and scalability.

MS Access

The database, which has been fully populated with a username and needed values, is located in the "Database" directory. This folder contains two MS Access databases. The version named UltimateSurvey.mdb is in MS Access 2000 format, and the version named UltimateSurvey-97.mdb is in MS Access 1997 format. Ultimate Software Designs recommends that you use the version of the database in Access 2000 format, but both versions will work the same from an application standpoint. There are no database passwords by default.

After deciding which version of Access you will be using, you may delete the other Access database if you like. At this point, you may want to move the database to another location on the server.

IMPORTANT NOTE: The anonymous IIS user must have WRITE permission to this file. If you do not allow anonymous write access, you will not be able to use the application. Please contact your hosting provider if you are in a shared hosting environment and cannot directly set permissions.

SQL Server

a) You may use an existing SQL Server database or create a new database for the application. If you decide not to create a new database and to use an existing database instead, note that all table names have the prefix "usd_" so that they can easily be distinguished from other tables in the database.

b) Load the tables into the database. The script for the tables is located in the file, "UltimateSurveyTables.sql," which is located in the "Database" directory. The best way to load the tables is to open Microsoft Query Analyzer, open this file from Query Analyzer, and execute.

c) Create a user in the database for the Ultimate Survey application. Grant this user full access to all of the tables.

d) Load the required data into the database. The script for the data is located in the file, "UltimateSurveyData.sql," which is located in the "Database" directory. The best way to load the meta-data is to open Microsoft Query Analyzer, open this file from Query Analyzer, and execute.

Database Connection Setup

Ultimate Survey Advanced uses a DSN-less connection. The connection string is located in the file, "SurveyConnection_inc.asp" in the \Include directory. This file contains two versions of the constant DB_CONNECTION. One version is for connecting to a SQL Server database, and the other is for an MS Access database. Above each constant are detailed comments for how to configure the connection string for your database. At this point, comment out the constant that you will not be using and set up the connection string as shown.

In the same file ("SurveyConnection_inc.asp") there is a constant called DATABASE_TYPE. Depending on whether you are using SQL Server or MS Access, the value for this constant must be updated to either "Microsoft SQL Server" or "MS Access", as appropriate. These values are noted in the comment above the constant.

We do not recommend using Server.MapPath in your connection string. If you need to find out the location of your database, please create a test page to do so.

REGISTERING TO USE THE SYSTEM

When the application is first installed, there is only one user that has access to the system. The username for this user is 'admin' and the password is also 'admin'. This user is of type 'Administrator'. For more information on the privileges of a user of type 'Administrator', see section 6: Managing Users.

Users may either register to take surveys via the "Register" button on the "default.asp" page or be registered by an Administrator. Public registration creates a user of the type specified in the Default User Type under Registration Settings. To allow public registration to the survey application, the "Allow Public Registration" checkbox on the application's Settings tab must be checked. For more information on the privileges of a user of type 'Administrator', see section 6: Managing Users.

The following rules are enforced for new user registrations:

1) Usernames must be unique
2) An Email address is required
3) Email addresses must be a valid format (e.g. xxx@yyy.com)

Administrators can register new users by clicking "Add User" under the "Manage Users" menu item of the Users tab. Here Administrators can also change the user type, contact information, and group designation of any users by clicking on the username of the user they wish to edit. Please refer to section 6 (Managing Users) for more information.

MANAGING YOUR LOGIN INFORMATION

Once logged in, a user may change his or her login information at any time. To do this, click on the user's username in the top right corner of the screen or select the My Info navigation tab. The user's password must be entered to make any changes.

As mentioned in section 1.C, the application comes preloaded with one user with administration privileges. We highly recommend that you change this password as soon as you complete the installation of the product.

GLOBAL SETTINGS

The global application settings are managed in the Settings tab. Here you can edit the system settings including registration, email, and appearance settings.

The editable system settings are as follows:

	Folder/Path Settings
Root Path	The URL of the main directory of your application. (For example: http://www.ultimateapps.com/UltimateSurvey/) This is used to generate links when inviting users.
Uploaded Image URL	The URL of the directory that contains any images you choose to upload for a survey. This setting is not based on root path so that you can store images in a different location if you please.
Uploaded Image Folder	The system path to the directory on your server where uploaded images will be stored. To upload images, you must setup IIS so that the anonymous Internet user has "write" privileges for this folder.
	Appearance Settings

Top Color	Color of the absolute top of the page, where the title is located. You can use the color picker or specify your own color.
Menu Color	Color of the menu background.
Title Color	Color of the application title, displayed at the top of the page.
Site Name	Name of the web site, to be used in the header, browser title, and emails sent from the site.
Dropdown Menu Text	Text which will appear in dropdown menus when no item is selected.
Home Page Header	Text which will appear in large letters on the home page.
Home Page Text	Text which will appear in smaller letters on the home page.
Show Navigation Links When Not Logged In	Checkbox sets whether or not to show navigation links to a non-logged in user. If you choose not to show the links, only the colored bar with the title will be displayed when a user is not logged in. If you choose not to show the links, also make sure you know the login page link for your own administrative needs.

Registration Settings

Allow Public Registration	Choose whether or not to allow any user with access to the main URL to register to use the application. Either way, administrators can always manually register users.
Email Required	Choose whether or not email address is required for public registration. (Only applicable if public registration is allowed)
Default User Type	User type for public registration. (Only applicable if public registration is allowed) Administrators can change a user's type at any time.

Custom User Fields

You may specify up to three custom field names for users. These fields will be available when users register themselves, and when administrators create users. Any user may edit their information in these fields by clicking the "My Info" tab. An example of a custom user field might be “Department”.

Email Settings

Email Object	Email object used to send email (optional but required if you want to use the survey features dependent upon email) CDONTS - Installed as part of IIS on most NT servers. Most likely used if you have the application running on your own server. ASPMail - Installed on most hosted environments. JMail - Used on some hosted environments.
SMTP Mail Host	Host name to send mail from. Required for ASPMail and

	JMail. Not required for CDONTS.
Invite Users "From" Address	"From" address of emails sent to invite users to take a survey
Survey Results "From" Address	"From" address of emails sent when survey is complete.

Security Settings

Prevent Concurrent Login	Checking this box specifies that the same user cannot be logged in on different computers at the same time. If a user is logged in on one computer, and the same user logs in on another computer, the original log in will be logged out of the system.
Session Type	This application supports both Cookie and IIS Session based session management. You can change this setting by toggling the "Session Type" option on the settings page. IMPORTANT NOTE: Please note that changing cause any users that are logged into the system to be logged out. Therefore, we do not recommend changing this unless you are positive that you want to switch. Which type should I choose? Both session types have their own pros and cons: Cookies (recommended) Cookies are preferred and offer several additional benefits if using surveys with Anonymous access enabled. Specifically, anonymous users are remembered when they leave the site and return. This allows you to properly attach a survey to an anonymous user to allow them to continue where they left off OR to prevent them from taking surveys more than the specified number of times. In addition, using cookies allows the application to be used in a load balanced or redundant environment where IIS session management has been disabled. Sessions (requires IIS session management to be turned on) In the even that you do not wish to use cookies, the application can support the built in IIS session management. As mentioned in the section above, some features for anonymous survey taking are not available under this scenario as there is no way to identify users that leave and return at a later time.
Session Timeout	Number of minutes of inactivity before the user "session" ends and the user is automatically logged out.
Cookie Name	Name for the cookies set by the application. Changing this value for each installation of Ultimate Survey will allow you to safely have multiple installations of Ultimate Survey on the same domain.

Other Settings

Results Per Page	Number of results to show on each page for results returned in pages.
Default Report Type	Choose between 3D color graphs or table views for default report behavior.

CHAPTER 2: CREATING SURVEYS

OVERVIEW

Ultimate Survey Advanced allows users to create complex surveys using an intuitive, rich web interface. Surveys may be created by users of type "Administrator" or "Create and Take".

CREATING A NEW SURVEY

If you are logged in as a user with permissions to create surveys, you will see a "Manage Surveys" menu item under the Surveys tab. Select this menu item and then click the "Add New Survey" button. An empty survey will be created and you will automatically open that survey's management page.

The survey properties are as follows:

	Title / Description Properties
Survey Title	Main title of a survey. Displayed on all pages in survey. Must be unique.
Description	(Optional) - Description of survey. Displayed on all pages in survey.
Template	Style templates for the survey appearance.
	Basic Survey Options
Allow Users to Resume	Check this to allow users to stop taking a survey, then come back later and resume where he or she left off.
Allow Users to Edit Response	Check this to allow users to edit answers from a previously completed survey.
Show Survey Progress	Check this to show the user what page they are on relative to the end of the survey (for example: Page 3 of 6). Note: This may not be accurate for surveys with items or pages shown conditionally.
Scored Survey	Check this to allow points to be assigned to preset answers. You will be able to see user's scores in reports and search based on score ranges. The survey completion message can be customized to reflect a survey score.
Number Labels	Check this to place a number next to survey questions.
Log NT User	Check this to log the username if the survey participant is an NT user. Only useful when administering surveys on NT networks.
	Response Options

Survey Type	Public - Anonymous users can take survey. Registered Users Only - Only logged in users can take survey. Restricted - Only users specified by survey creator or and administrator can take survey.
Start Date	(Optional) Date for survey to become available. Survey must also be activated.
End Date	(Optional) Last date this survey is available.
Max Respondents	(Optional) Maximum total responses to this survey.
Responses Per User:	(Optional) Maximum times each user can take survey. Leave blank for unlimited.
	Reporting Options
Privacy Level	All Results Private - Only survey creator and administrators can view survey response information. Summary Results Public - Public can view only results totals, not individual responses. Detailed Results Public - All response information is public.
	Survey Completion Options
Display Message	(Optional) Displays this text when user completes survey. Gets overridden if you choose a URL to redirect to.
Redirect to URL	(Optional) Redirect to URL - Brings user to this URL. Overrides 'Display Message'. If URL is outside of domain, it must be prefaced by http://
Email Responses to:	(Optional) Details of each response will be sent to this email address.

STYLE TEMPLATES

Style templates allow you to customize the look-and-feel of a survey. To create a new Style Template, select the “Style Templates” menu item under the Surveys tab and click “Add Template”. Specify a template name and continue. You can specify a custom HTML header and footer tags, as well as various appearance settings such as Font and Color properties. To save a new template, click the “Submit” button. That template will then be available in survey property page.

SURVEY MANAGEMENT

A user can view all the surveys he or she has management rights for by selecting the “Manage Surveys” menu item under the Surveys tab. From this page you will see a table view of all surveys and have the option to manage copy or delete an individual survey. To create a new survey, select the “Add New Survey” button. To the right of the table view, each survey provides buttons for managing, deleting, and creating a copy of the survey. From this page, you can also do a keyword search of the titles or descriptions of existing surveys.

A management page is created for each individual survey. Access to a survey's management page is limited to Administrators and the survey's creator. Survey management pages provide a snapshot of a survey's properties, including Survey Name, Survey Owner, Start and End Dates, Number of Items and Pages in the survey, and Survey Activation Status.

A survey's management page provides buttons to edit the survey contents, edit the survey properties, and to delete the survey. You can add or edit items in a survey by selecting the "Edit Survey" button; this action brings you to the Edit Survey page.

Also included in a survey's management page are links to access and manage survey results, security, participants, as well as a "Print Survey" button. See the sections detailing those features for more information.

THE EDIT SURVEY PAGE

The "Edit Survey" page allows a survey creator or Administrator to view and edit the contents of a survey. From a survey's management page, select the "Edit Survey" button to edit that survey's contents and you will page views of the survey. Use the "Go to Page" button to navigate to a specific page in the survey.

By default, each survey is created with one blank page. You will see options to Add, Copy and Delete a survey page. For more information about Pages in Ultimate Survey, see the section below: Working with Pages.

To add items to a survey page, click the "Add Item to Page" button. Once you have items in your survey, you can reorder them using the up and down arrows to the left of the item.

ADDING SURVEY ITEMS

Once you have created a survey you can add items to it from the survey's management page. A survey item is any element of a survey, including question types, messages, and images.

To add an item to the survey, click its "Edit Survey" button. If this is the first item for the survey, you will go directly to the Items list. Otherwise, this action will bring you to the Edit Survey page. Selecting the "Add Item to Page" button will bring you a list of Item options. All of the item types are described on this page. Choose one and the options for that type will be displayed. Choose your item options and click "Submit". See Appendix 1 for more details on specific item types.

You can also add items to a survey from a Question Library. From the "Add Item to Survey" page, click the "Add Item from Library" button to see a list of available Question Libraries. Choose a library and check the items you wish to add to your survey. For more information on creating Question Libraries, see the next section.

QUESTION LIBRARIES

Question Libraries contain saved items and are accessible to all “Create and Take” users and Administrators on the system. To access Ultimate Survey Advanced question libraries, select the “Question Libraries” menu item under the Surveys tab. To create a new library of items, click the “Add Library” button and name the library and add it to the system. To rename the library at any time or to change its description, click the “Properties” button to the right of the library’s name. To permanently delete the library, click the “Delete” button to the right of the library’s name.

To add items, view the library contents, or edit library items, click the library’s “View/Edit” button or the library name. From the “Add Item to Library” page, you can add a new item, add an item from an existing survey, or add an item from another library.

Choosing to add a new item will bring you to the familiar “Add Items” page. From here you follow the same procedure for adding an item to a survey. Choosing to add items from an existing library will bring you to a list of available libraries. Select the library you need and check the library items you wish to add. Choosing to add items from an existing survey will bring you to a list of available surveys. Select the survey and check the items you wish to add.

WORKING WITH PAGES

Ultimate Survey organizes surveys into pages to help organize your survey and in order to perform conditional handling of responses. To add another item to a page, click "Add Item to Page”. To add a new page, click “Add Page”, and you will be brought to the add item page. This item will be added to a new page in the survey and you will see the view of the page you have just created.

MOVING & COPYING ITEMS

For all surveys with more than one page, each item will have a “Move to Page” button next to it. Clicking this button brings up the “Move Item to Other Page” dialog. This page will allow you to move the item to any of the existing pages, or to choose to add the item to a new page. If you add the item to a new page, the page will appear at the end of the survey.

Note: The first page of your survey must always contain at least one item. If there is only one item on the first page, you cannot move that item to another page without first adding another item to the page.

To copy an item inside the same survey, click “Copy Item”. You can choose any page (including the current page) as the destination for the copy. There is also a check box which allows you to specify whether or not conditions are copied as well.

MOVING, COPYING & DELETING PAGES

When you have more than one page, you can choose to reorder a survey page at any time. Click “Move Page” and you will be asked to choose where you would like the page moved to. If, for example, you choose to move page 4 before page 2, page 4 becomes page 2 and page 2 becomes page 3, and so on.

To copy a page, click the “Copy Page” button at the top of any page while in edit mode. The new page goes to the end of the survey, but you can move it to wherever you want by then using the “Move Page” function.

All conditions (to both the pages and items) are maintained when copying and moving pages.

If you delete a page using the “Delete Page” button, the remaining pages will shift to reflect the new order of the survey. For example, if you delete page 3 of a 5-page survey, page 4 will become page 3, and page 5 will become page 4.

COPYING SURVEYS

Under the “Manage Surveys” section, every survey has a “Copy” link. Clicking this link will result in the creation of an exact duplicate of the survey, which will be named the same as the original with “_copy” appended to the end of it. This is useful when creating similar surveys or when using an existing survey as a template.

SCORING MESSAGES

When working with a scored survey, there will be a link to manage “Scoring Messages.” This feature allows you to display one or more custom messages to the user based on their score. For example, if the user scores 60 to 100 you may wish to display a message stating “You have passed.” In addition, scoring messages can overlap so that you can display multiple messages to the user.

HIDDEN FIELDS

When working with any survey, there will be a link to “Hidden Fields”. This is a very powerful feature that requires knowledge of asp code to work with. “Hidden Fields” allow you to automatically fill in questions based on values knows before the user takes a survey. These values can be passed via the querystring, cookie, or session. You can immediately branch to other parts of the survey based on these values. Also, pages and items can be conditionally displayed depending on these values.

Example:
You create an employee satisfaction survey for internal use in your company, and post a link to it on your intranet. When an employee logs into your intranet, the

login page looks up the employee's department and sets a corresponding session value, such as Session("department") = "Sales". The employee then clicks on a link to take a survey that you created with Ultimate Survey Advanced. You want to capture the employee's department without asking. So, you add a hidden field with the corresponding setup:

Question: What is your department?
Field Type: Session
Variable Name: department

Now, when the employee goes to take a survey, the fact that his/her department is Sales is captured before the first question is asked. This will allow you to ask questions based on the employee's department starting immediately on the first page. See *Working With Conditions* for more information on conditions and branching. You can also use the values for hidden fields in *Answer Piping*, described below.

ANSWER PIPING

Answer piping allows you to include the response from one question in a subsequent question. You can "pipe" the response into the question text, question description, potential answers, and matrix set text and matrix categories.

Example:

If a user answers "Hamburgers" to a "What is your favorite food?", a subsequent question could read "How often do you eat Hamburgers?"

When adding or editing an item, there will be a link to "Set Piping". This will allow you to choose up to 3 questions to pipe answers into the current item. To pipe an answer into a question (or answer, or description, etc), copy the code such as '@@pipe1' next to the appropriate question in the dropdown, and paste it into the appropriate area when editing the question.

Chapter 3: Working With Conditions

OVERVIEW

Now that you have learned how to create a basic survey, conditions can be implemented. Conditions in Ultimate Survey allow for creating intelligent surveys. With conditions, you can show questions or pages of questions only to respondents that had specific answers to previous questions. This allows you to build a survey that asks the appropriate questions.

WHAT IS A CONDITION?

A condition specifies that a page of survey items or an individual item will be displayed depending on the respondent's answer to a previous question, or combination of questions. Unlimited conditions can be set for each page of items or for each individual item.

In order to display conditional items or pages you must have more than one page in your survey, or have "Hidden Fields". Because responses are not recorded until the user clicks "Continue" at the bottom of a page, conditionally displaying items or pages cannot appear in the same page as the item(s) they depend upon.

If there are no conditions set for an item or page, that item or page will always be displayed. If there are conditions set, that item or page will ONLY be displayed when the condition or set of conditions is true.

ITEM-LEVEL CONDITIONS

Item-level conditions allow you to specify a condition or set of conditions that determine whether or not the item is presented to the survey taker for a response. You can place multiple conditions on an item. Please follow the instructions below to create a new condition.

Steps to create a new condition:

Click the "Item Conditions" button to the right of the item you want to set conditions for. (This item must appear after the first page of your survey.)

Choose a question that your conditional item will depend upon. The question dropdown contains all of the questions from pages previous to the page conditions are being set on.

Choose an operator

The following types of conditions can be evaluated:

- Answer to question **equal to** a certain value
- Answer to question **not equal** to a certain value
- Answer to question **greater than** a certain value

- Answer to question **less than** a certain value
- Answer to question **contains** a certain value
- Answer to question **does not contain** a certain value
- Question **has been answered**
- Question **has not been answered**

Choose a value

For all operators except “Answered Question” and “Did Not Answer Question”, you must choose a value. For questions that have preset answers, you will be able to choose a value from the dropdown menu. You can also, for all questions, specify a value by typing your own in the box.

PAGE CONDITIONS

Conditions can easily be applied at the page level. This means that the entire page of questions will not be displayed unless the conditions are met. This allows you to quickly create sections of questions that are displayed (or not displayed) based on answers to a previous question or questions. You can place multiple conditions on a page.

In order to have conditions at the page level, click the “Page Conditions” button when managing a survey. Note that in order for this button to appear, you must have more than one page in your survey. You cannot add page conditions to the first page of the survey as there are no previous questions to base the conditions on.

Once you have clicked the “Page Conditions” button, please follow the instructions as outlined in the previous section on Item Conditions.

PAGE BRANCHING

Page branching refers to action taken upon an event. While similar to conditions, branching differs in that it actively directs the respondent to a new page based upon their responses rather than passively checking previous responses before checking whether to display and item or page. To use page branching, you must have more than one page in your survey. Branching is not available from the last page of your survey.

To add a page branch, from the “Edit Survey” page, click the “Page Branching” button. From the branching tool page, select a question from which to branch off from. Set the conditions for the branch, and specify a page to go to if those conditions are met. The useful application of page branching is to add several branching rules to a single question. Note: If you add multiple branching conditions that return true, only the first branching rule will be processed.

CHAPTER 4: ADMINISTERING SURVEYS

OVERVIEW

Once you have completed creating your survey, it's time to activate it and allow users to take your survey. This chapter covers the actions and options that are available to help you successfully launch and promote your survey campaign.

ACTIVATING / DEACTIVATING SURVEYS

In order to make your survey available to respondents, you must activate the survey. You can do this by going to the "Manage Surveys" menu item under the Surveys tab. Select the survey you wish to activate and select the "Activate" in the survey's Status section.
Once activated, the survey is available for respondents to respond to until the optional end date is reached, the optional maximum number of responses is reached, or the survey is deactivated (the first two options are covered Chapter 2: Creating Surveys). To deactivate a survey, go to the "Manage Surveys" menu item under the Surveys tab and select the survey that you wish to deactivate. Once you select the deactivate option, the survey can no longer be taken, but it is not deleted from the system. You may reactivate the system using the steps outline above.

CLEARING DATA

Once you have started receiving responses to your survey, there may be the need to administer and clean data from the responses. In many cases this is due to either bogus survey responses (most likely when running a public survey on an unrestricted internet site) or due to user errors that have made the response invalid in your analysis. There are several ways to clear out bad data.

To clear all of the response data for an individual survey:
1) Go to the "Manage Surveys" menu item on the Surveys tab
2) Select a survey that you wish to manage
3) Click the "Delete Results" link
4) Click "Ok" to confirm
5) All response information for the survey is now deleted

To clear all the response data for particular users:
1) Under the Users tab, select the "Manage Users" menu item and locate the user or users whose responses you want to clear.(Information on searching users can be found in Section 7: Managing Users)
2) Check the box under "Delete all responses" for any user that you want to delete all responses for.
3) Click "Delete" at the bottom of the page.

To clear individual response data for particular users:
1) Under the Reports tab, click the "Details" button of the survey you want.

2) Check the response(s) you wish to delete and click the “Delete Response” button.

SECURITY

You can set the security level of your survey in the “Security Settings” link on the “Manage Survey Page”. You may choose from the following types of security:

Public	This type of survey allows you to simply email survey invitations. Access to the survey is public and anonymous. You can, however, invite specific users to take the survey.
Registered Users Only	This survey type allows any registered users to take the survey. This security option allows you to send all registered users an email invitation to your survey.
Restricted	This survey type denotes that access to the survey is restricted to users specifically given permission for the survey. You can specify group access.

INVITING USERS

When managing a survey, you may choose to “Invite Users”. This functionality varies depending on what type security you have set for the survey you are working with. You can set the survey access in the “Security Settings” link on the “Manage Survey Page”.

To invite users, click the “Send Invitations” link on your survey’s management page.

If your survey security setting is set to “Public” you will see a page with a form for your email “From Address”, subject, and text; an Email Lists form to select lists of email addresses to send to; and a multi-line textbox to manually enter or cut-and-paste email addresses for your invitations. Click the “Invite Users” button to send your invitations.

If your survey security setting is set to “Registered Users Only” you will see a page with just the email information form and an optional checkbox. To include login information within the body of the email, check the “Include login information” box. You may also see a popup invitation list by clicking the “Show Addresses” link. Click the “Invite Users” button to send your invitations. Note: This security option will send invitations to ALL registered users. If you only want to invite specific users, use either Public or Restricted survey access.

If your survey security setting is set to “Restricted” you will see buttons to set the Access Lists for your survey. You can give users or groups permission to access the survey (See more on User Groups in the Chapter “Managing Users”). To add individual users, Click the “Add Users” button and check the “Allow” checkbox to the left of the user’s username. In restricted access mode, individual access settings will override group access settings. If you wish to add a group but exclude certain users, first add the group, then, individually deny access to the users you wish to exclude.

REMINDING USERS

You can send reminders to invited users who have not taken your survey. From the “Manage Survey” page, choose “Remind Users” and specify the From Address, Subject, and Body of the email to be sent. A reminder will be sent to all invited participants who have not taken the survey. To see a list of addressees, click the “Show Addresses” link.

CHAPTER 5: MANAGING USERS

OVERVIEW

When a user with "Administrator" privileges is logged into the application he can manage all users in the system. If it is a new installation, the administrator will have to add users under the Users tab. If there are users in the system besides this administrator, a link to "Manage Users" will appear under the Users tab. To add a new user, click the "Add New User" button.

ADDING A NEW USER

You must enter login information for the user and a valid password and user type. Optionally, you may also add contact information and specify group affiliation for the user. (See more about User Groups below.) Click the "Add User" button at the bottom of the page to complete the new user registration.

SEARCHING FOR USERS

You can search available users using the following search options:

Username	Enter all or part of the username or the user(s) you would like to find.
Email Address	Enter all or part of the email address of the user(s) you would like to find.
User Type	Enter the numerical representation of the user type of the user(s) you would like to find. (1, 2 or 3, see below for more information)
First Name	Enter all or part of the first name of the user(s) you would like to find.
Last Name	Enter all or part of the last name of the user(s) you would like to find.
Domain	Enter an NT domain name and retrieve all users within that domain.
View All	Will show all users again, clearing the search results.

If there are more users returned than shown per page there will be paging links at the bottom of the page. Clicking a username will bring up that user's management page, allowing you to view and change the user's registration information, contact information, group affiliations, and security permissions.

USER TYPES

Three user types are available with the following permissions:

Administrator	This user has the right to do everything in the application. This includes viewing all reports, editing any survey, managing users, deleting results, and taking any survey that he or she pleases as many times as he or she pleases. The numerical representation for user type Administrator is '1'.
Take and Create	This user may create an unlimited number of surveys and take any survey that is available to all registered users, or any registered survey he or she is given permission to take by another survey creator. He or she may edit any survey he or she creates, may take the survey as many times as he or she pleases, may delete any response for each survey he or she creates and view all reports for surveys he or she creates. The numerical representation for user type Take and Create is '2'.
Take Surveys Only	This user may take any survey available to "Registered Users Only" and can be permitted to take "Restricted Surveys". The numerical representation for user type Take Surveys Only is '3'.

User Administrators may also delete a user, or delete every survey response of a user. Simply check the "Delete User" or "Delete All Responses?" checkbox and click the "Delete" button at the bottom of the page. Administrators also have privileges for application-wide settings. Note: Changes to application-wide settings affect all surveys. Use caution when changes the application settings.

USER GROUPS

Administrators can create user groups to ease user management tasks such as inviting survey respondents. To view groups, select the "User Groups" menu item under the Users tab. You will see a table view of available groups (if there are any) and buttons for viewing/editing, changing the properties, and deleting groups.

To create a new group, select the "User Groups" menu item under the Users tab and click "Add New Group". Specify a name and description (optional) and click "Submit". You will be brought back to the User Groups management page.

To add or delete users from a group, select the "View/Edit" button for that group and click the "Add Users to Group" button. You will be given a list of available users. Check the "Add" checkbox next to the user's username. You may add as many users as you like. Click the "Submit" button at the bottom of the page. Your users will now be visible in your group. You may remove a user by checking the “Remove” checkbox next to that user’s username and clicking the “Submit” button.

BULK USER REGISTRATION

Bulk User Registration allows an administrator to register multiple users at once using a comma-separated flat file or by manually entering user registration information. To use bulk registration, select the “Bulk User Registration” menu item under the Users. You will see a list of drop-down menus that will correspond to the comma-separated columns of your flat file. You must select the menu item that will map to your user file. For example: If your user file contains the following line of user information:

jdoe@xxx.yyy, John, Doe, Acme Inc.,

You would select “Email Address” for Field 1; “First Name” for Field 2; “Last Name” for Field 3; and “Company” for Field 4.

You must input either a Username or a valid email address. A username will be created with the email address provided if no username is specified. If you plan to use NT authentication instead of Username/Password authentication, do not specify a user password.

The next page will allow you to specify what survey privileges the users will have. You must specify a Login type. If you choose NT Authentication, you may specify an NT domain name.

In the “Enter User Information” text area you can either manually enter the comma-separated information or cut-and-paste it from another file. Note: Limit your bulk registration lists to 1500 users per batch.

The “Prevent Duplicate Addresses” checkbox will disallow duplicate email addresses in the system. If you choose to send an email notification to each registrant, check the “Send email to each new user?” checkbox to view Email Options. You can also specify User Groups for bulk registration. Click the “Submit” button to register your users.

EMAIL LISTS

Email lists allow an administrator to manage mailing lists of survey invitees. To create a new email list, click the “Add New List” button. Provide a list name and description (optional) and Click the “Submit” button. To change the name of an email list, click the list’s “Properties” button; to delete a list, click the list’s “Delete” button.

To add addresses or manage an email list, click the “View/Edit” button. You will see a view of the list’s contents. To add addresses to the list, click the “Add Addresses” button and manually enter or cut-and-paste a list of email address to enter. Note: You are limited to 1500 email address per batch. If the address already exists in the list, you will receive an error noting which addresses weren’t added because of duplicates.

CHAPTER 6: REPORTING

OVERVIEW

When users have started taking your survey, you may begin to view and analyze the data that is recorded. Ultimate Survey provides several methods to do this, all of which are done in real time. The first and most simple method is to view individual responses to a survey. This will allow you to check the data and instantly gain a sense of how people are responding. In addition, there are several summary reporting features including various graphing options built into the application. These reporting features will assist you in gaining a high-level understanding of how users are responding to your survey. There is also a convenient interface to export data. This piece of the reporting interface is very important, as it gives you the ability to take the data out of Ultimate Survey Advanced and use it in other data analysis tools, such as Microsoft Excel, SPSS, or Crystal Reports.

VIEWING REPORTS

In order to view a single user's response to a survey, you must first login to the application with a user that has administrative/owner access to the survey that you plan to report on OR the survey must have the "All Results Public" attribute set.

To get to the reporting section, you can click the "Reports" tab in the navigational bar from anywhere in the application. You will see a page containing a table of surveys with available reports. If there are no surveys in the list, it means that you do not have permission to look at any of the results. View a survey's report by clicking the "Summary" button. This will take you to a screen that shows you the graphical summaries for the survey. To change the type of chart, click the type of chart you want. You can choose from Pie, Bar, Donut, and Line Charts. You can also view a printer-friendly version of this page by clicking the "Printable Version" button. If a survey owner or Administrator changes the chart type, the new chart becomes the default chart type for that question.

To see a list of all respondents, select the "View Responses" button from the "Summary" page or click the report's "Details" button in the "Reports Home" menu item. To view the detailed responses of any respondent, select the user's "Response ID" number. An Administrator or survey owner can edit any response by clicking its "Edit Response" button. This action will bring up the survey populated by the respondent's answers for you to edit. To submit your edited survey, click the "Complete Survey" button. To delete a survey response, check the response's "Delete?" box and click the "Delete Responses" button.

From the list of all respondents, you can view the percentage of responses for each survey item. Click the "View Statistics" button to view the response count and percentage of total answers for each option of every survey item. To drill down into the questions and see the break-down of responses, click the item's "Response Count" link. This will bring up all the users who chose that item and allow you to see how those users responded to other items in the survey.

Note: All of this data is analyzed in real time; if you have a high traffic site, data may change quickly.

SEARCHING REPORTS

You can filter the report data using the “Search Results” menu item under the Reports navigation tab. Select a survey and you will be brought to the search criteria page. To search results based on a scored survey (See the section above on Scored Surveys) input the range of scores and click either the “Graph Results” button to see graphical results, or the “View Responses” button to see a table view of responses.

To search by a particular value, select a survey question from the drop-down menu; choose a logical operator; if the question item has a pre-defined list of answer options, choose a value from the drop-down list; if the question does not have pre-defined list of answer options, input a search string and click either the “Graph Results” button to see graphical results, or the “View Responses” button to see a table view of responses.

EXPORTING DATA

While viewing reports for a survey, anyone with full reporting privileges for that survey will see a link to “Export Results”. Following the instructions below, you may easily export any set of survey data.

Steps to Export Results:

1) Choose whether you would like Detailed Response Information in the export. This includes Date/Time Started, Date/Time Completed, Total Time, and the IP address of the user who took the survey.
2) Choose whether you would like Detailed User Information in the export. This includes First Name, Last Name, Email Address, Title, Company and Location for each survey response.
3) Choose whether you would like to export Alias names for questions. If you export with Aliases, aliases will be exported instead of Questions names. This is of value if you wish to specify integer aliases for use in SPSS. Note: if you do not specify an alias and check this option, non-aliased items will appear with a blank column title. Aliases answers will be displayed even if the column heading is blank.
4) Choose whether you would like checkbox items to appear in one column. If checked this option export just the question to the column name and each answer will appear in one cell of the column in a semi-colon delimited list. If unchecked, a column will be created for each potential answer; within each column, for each response a 0(unchecked) or 1(checked).
5) Choose whether you would like to export Open-Ended questions, i.e., question for which there are no pre-defined answer options.
6) Click Export

Each row in the export file represents a survey response. The questions are on the top row. From here you can use Excel or any other program that supports CSV files to manipulate the data.

APPENDIX 1: SUPPORTED ITEM TYPES

OVERVIEW

A survey is comprised of one or more “item types”. An item type can be either something that prompts the user for an answer or something that is used purely to display information.

CHECKBOXES

Checkboxes allow you to gather multiple answers to the same question. For example, the question could be "What activities do you enjoy?" and the answers could be "Reading, golfing, watching theater" etc. You may change the number of answer input boxes at the top of the page.

Parameters:

Question:

Question Text	The question to be asked to the user
Sub Text	Instructional or other text to appear below the questions
Enter Answers	Enter the allowed answers. Click “Checked” to have an answer checked off by default. For scored surveys, you can also specify a point value for each answer.
Same Answers As	You may choose to use the set of answers from any other question that has pre-set answers. Choosing one of these will override any answers you have entered manually.
Allow Other	Allows the user to choose “Other”. If you choose this, you may also specify the “Other” text to be displayed for the checkbox that indicates “Other”.

Item Options:

Randomize Answer Order	All of the answer options will be displayed in a random order to prevent answer bias. Note: If you allow “Other”, it is always the last choice.
Number Labels	Choose this to have a number and a period displayed next to each item. (e.g. 1. Reading, 2. Golfing)
Minimum to choose	Allows you to force the user to choose at least a specified number of checkboxes.
Maximum to	allows you to prevent the user from choosing more than a specified

choose	number of checkboxes

DATE

This data type items allows users to enter a date value from dropdown lists.

Parameters:

Question:

Question Text	The question to be asked to the user
Sub Text	Instructional or other text to appear below the questions

Item Options:

Default Date	Date to be selected at page load
Earliest date allowed	First date that the user can choose. The user will be able to enter any date in the year of the earliest allowed, but will not be able to continue if it is earlier than this specified date.
Latest date allowed:	Last date that the user can choose. The user will be able to enter any date in the year of the latest allowed, but will not be able to continue if it is later than this specified date.
Answer is Required	Check this to require that the user selects a date.

DROP DOWN MENU

A drop down menu allows users to choose from multiple answers without taking up much room on the page. These are especially useful for questions with a large number of potential answers, or pages with a large number or questions or other items.

You may change the number of answer input boxes at the top of the page.

Parameters:

Question:

Question Text	The question to be asked to the user
Sub Text	Instructional or other text to appear below the questions
Enter Answers	Enter the allowed answers. Click "Checked" to have an answer checked off by default. For scored surveys, you can also specify a point value for each answer.

Same Answers As	You may choose to use the set of answers from any other question that has pre-set answers. Choosing one of these will override any answers you have entered manually.
Allow Other	Allows the user to choose “Other”. If you choose this, you may also specify the “Other” text to be displayed for the checkbox that indicates “Other”.

Item Options:

Randomize Answer Order	All of the answer options will be displayed in a random order to prevent answer bias. Note: If you allow “Other”, it is always the last choice.
Number Labels	Choose this to have a number and a period displayed next to each item. (e.g. 1. Reading, 2. Golfing)
Minimum to choose	Allows you to force the user to choose at least a specified number of checkboxes.
Maximum to choose	allows you to prevent the user from choosing more than a specified number of checkboxes

HEADER

A Header displays a plain text header. "Header Text" displayed in large letters, and "Sub Text" is displayed in smaller letters. This item type does not capture an answer from the user.

HORIZONTAL LINE

This displays a plain horizontal line across the screen. This item type does not capture an answer from the user.

HTML

This allows you to add freeform HTML. Take care to make sure the HTML is in good form, to avoid it affecting other HTML in the page

IMAGE

Allows you to specify an image on the web, or upload an image, for display in the survey.

Options & Parameters:

Specifying an image on the web:	Enter the full URL, including http:// of the image you would like to point to. Note: Using this option only if you trust that the website this image is located on is stable.
Uploading an Image:	• Click upload image • Browse to the file on your computer or network • Click upload file • Follow instructions on screen if anything did not work correctly • The file is uploaded to the directory specified when the application was set up • Once returned to the "Add Item" page you will need to click submit, and you are done
Message:	Message text is displayed in bold red letters

MATRIX QUESTION

Matrix questions are used to rank multiple items on the same scale. Another word for this is Likert Scale. **Options:**

Question:

Question Text	The question to be asked to the user.
Categories	The sub questions related to the Question Text.
Answer Set	Drop-down set of possible answers for each category. The answer set is the same for all categories. Set the Answer Set text in the "Set Text" input box.

To create a matrix question add the Matrix Question item to your survey. Select "Edit Question Text" and specify the question. You may optionally specify a question alias and description. An example of a matrix question might be "How do rate our company in the following departments?" Next, click the "Edit Categories" button and add the categories you want. Example categories might be: "Customer Service"; "Price"; "Product Quality". You may also add aliases for these categories. Finally, select an answer set from the drop-down selection menu. The possible matrix answer sets are:

Answer Set Options:

Radio Buttons	Horizontal radio buttons. See Radio Buttons item description for more information.
Dropdown Menus	See Dropdown item description for more information.
Checkboxes	See Checkboxes item description for more information.
Single Line Inputs	See Single Line Inputs item description for more information.
Radio Button Scale	A type of radio button item that restricts input to a scale. For example, rate performance on a scale of 1- 5 with 5 being greatest.
Start of Scale	Radio Button Scale option. An integer which denotes the beginning of a number scale. (e.g., 1 -5)
End of Scale	Radio Button Scale option. An integer which denotes the end of a number scale.
Start Text	Radio Button Scale option. Text description of Start of Scale integer, e.g., 'Poor'
End Text	Radio Button Scale option. Text description of End of Scale integer, e.g., 'Excellent'

MULTIPLE LINE TEXT AREA

This item allows you to gather freeform text from the user. An example of this is to ask "What are your thoughts on this product?"

Parameters:

Question:

Question Text	The question to be asked to the user.
Sub Text	Instructional or other text to appear below the questions.

Item Options:

Default Value	You may specify text to be displayed in the text box by default. This can also be useful for pre-populating the field with instructional text.
Answer Is Required	Check this box to require users to enter a value in the text area.

RADIO BUTTONS

Allow the user to choose one answer from a list. These are ideal for questions with a small number of answers. You may change the number of answer input boxes at the top of the page.

Parameters:

Question:

Question Text	The question to be asked to the user
Sub Text	Instructional or other text to appear below the questions
Enter Answers	Enter the allowed answers. Click “Checked” to have an answer checked off by default. For scored surveys, you can also specify a point value for each answer.
Same Answers As	You may choose to use the set of answers from any other question that has pre-set answers. Choosing one of these will override any answers you have entered manually.
Allow Other	Allows the user to choose “Other”. If you choose this, you may also specify the “Other” text to be displayed for the checkbox that indicates “Other”.

Item Options:

Randomize Answer Order	All of the answer options will be displayed in a random order to prevent answer bias. Note: If you allow “Other”, it is always the last choice.
Number Labels	Choose this to have a number and a period displayed next to each item. (e.g. 1. Reading, 2. Golfing)
Answer Is Required	Check this box to require users to enter a value in the text area.
Answer layout style	Allows you to choose whether you want the answers and radio buttons displayed horizontally (next to each other) or vertically (each below the previous) **Note:** To simulate matrix type questions, use the horizontal layout style, and use “Same Answers” as to avoid entering the same values repeatedly.

SINGLE LINE TEXT FIELD

Users can type in freeform responses on a single line.

Parameters:

Question:

Question Text	The question to be asked to the user
Sub Text	Instructional or other text to appear below the questions

Item Options:

Required Answer Format:

- Numbers Only – user must enter a number. Both integers and decimals are accepted.
- Integers Only - user must enter an integer.
- Decimals Only – user must enter a value with a decimal place
- Money – user must enter a value monetary value
- Minimum Value – lowest number a user can choose. It is suggested that you use a required answer format in conjunction with this.
- Maximum Value – highest number a user can choose. It is suggested that you use a required answer format in conjunction with this.
- Default Value – you may specify a value to be shown in the text field when the page is loaded

Answer Is Required Check this box to require users to enter a value in the text area.