Collecting Responses for your Survey

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Once you have finished your survey design and are ready to begin collecting responses you can then **launch** your survey. This will then lock the question content of the survey, allowing you to collect responses from your survey users.

To collect responses you can either use **basic mode** (open access), or if you would like to use advanced options such as **email invitation sending**, or **custom access links** you can use **response groups**. These allow collection of data in differing ways but they can also be used to categorise your responses when they start coming in. For example, you may have conducted a survey which revealed a shortcoming in one of your products. You could then make the necessary changes to your product and then conduct the same survey again but collect responses with a different response group. All of your Surveyi reports and charts will be labelled with the response group for each response making for easy visual comparison.

Response groups can also have different start, finish and offline pages with different messages, and redirect URLs for your users upon survey completion, allowing for a unique survey experience for each group but with the same question set.

Launching your Survey

When your survey content is complete and you are ready to begin collecting responses, you must first launch your survey. To do so navigate to the **Survey Options** page for the survey you wish to launch by clicking on the **Survey Options** button in the surveys list on your **My Surveyi** user home page. From there, click the **Launch** wizard icon:

Each response has selections which map to proportions of your question and for this reason you cannot edit your question content after your survey has been launched; however you can reset the survey if you want to go back to the design stage at a later time (although that will erase all responses). After launch you can still change your survey appearance using the Surveyi Appearance Designer and change response group specific content such as start and finish pages.

To launch your survey click the **Launch** button at the bottom of the page. You will notice that the wizard icons have now been changed to the allow you to view responses and reports, and also reset your survey:

Distributing Your Survey

Launching your survey simply locks the question content and unlocks the response viewing options. You cannot begin actually collecting responses until you have configured your distribution options. Select the Distribute wizard icon to view and configure distribution options.


There are two main modes of distribution:

Open Access (simple mode) – A simple web link which you can enable or disable, and post on your website or send by email invitation.

Response Groups (advanced mode) – Use these for your own response categorisation, custom web links, SSL security, or sending out tracker email invitations.

You can always check whether your survey can actually receive responses by checking on the Survey Options page dashboard:
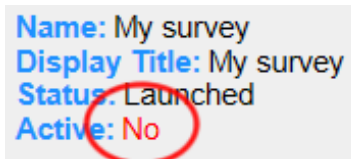
This survey is launched but there are no active response groups, and Open Access is also disabled so the **Active** status will be No. For your survey to be active, you will need to have launched it, and also require at least one active response group or Open Access. You can also view the status of each survey from your My Surveyi homepage.

There are two types of response group with increasing levels of features:

Private Group (Advanced) – A response group with a single link for access but with more options such as a customisable web link and secure SSL access.

Tracker Group (Advanced) – A response group with all of the features of a private group but with the option of distributing email invitations, each with a unique link so you can track the progress of each invitation.

Open Access (Simple Mode)

Open Access is the quickest and easiest way of retrieving results from your users. By default, open access is disabled. To enable it, navigate to the **Distribute** page for your survey and click **Open Access Enabled**, and then **Apply** to save the changes. It is possible to enable open access before launching your survey, but it will only become active after your survey is launched.

To begin collecting responses with Open Access you will need to publish the link provided in the **Open web access address** text box. You could, for example, email the link to a group of your contacts or publish it on your website or corporate home page.

Survey users who access the Open Access link for your survey will directed to your survey to complete the questions. If they close the survey half way through completion and then access the link later in, the survey will automatically resume from the last incomplete page. If the survey user completes the survey then they will be able to access it again from the same link if they want to fill it out multiple times with different people from the same computer, for example.

Private Response Groups

Private response groups are much the same as Open Access groups except that they have more options for customisation including link customisation and secure SSL access, start and end dates and response limits. Private response groups allow for categorisation of responses as you choose. You could, for example, run the same survey before and after a corporate rebranding but with response groups named 'before rebranding' and 'after rebranding' and then make direct visual comparisons of the results using the Surveyi charting tools. All data exports are also labelled with the response group.

To enable a private response group click **Advanced Mode** on the survey **Distribution** page for your survey, and then click **Add Group**. This will take you to a group settings page where you need to click **Private Group** and then **Save**. You can choose a response group name at the top of the page which will appear in your reports, but you can always rename it later.

Once you click save, the response group is saved in your survey's response group list which appears on the **Distribution** page for your survey. To begin collecting responses for private response groups you can publish the unique access link for this group to your website, or email it manually to those you wish to collect responses from. If you would like Surveyi to distribute invitation emails for you then you need to set up a **Tracker** response group.

Tracker Response Groups for Email Invitations

Tracker response groups let you track individual responses to your survey after setting up invitations from your Surveyi contact lists. You can manage the invitation and reminder design with the available options as well as distribution and response tracking. You can quickly isolate who has responded to your survey and view their response data in real time as they are completing their survey. You can also see if any emails have been rejected from your invitee email addresses or whether they have opted out of Surveyi surveys.

To enable a tracker response group click **Add Group** on the survey **Distribution** page, and click **Add Group**. This will take you to a group settings page where you need to click **Tracker Group** and then **Save**. You can choose a response group name at the top of the page which will appear in your reports, but you can always rename it later. To send invitations you will need to define invitations and contact lists. You can then track the progress of each invitation you send, issue reminders and see individual answers provided by each participant. This is covered in more detail later in this document.

Defining Contacts

Before you can collect responses for a Tracker response group you need to set up **contacts** to whom you can distribute invitations. You can set up contact lists for quick sending in the Contacts page available from the user menu bar:
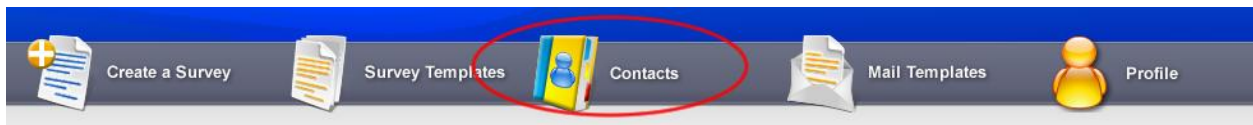
To add a contact list click **Add Contact List** on the Contacts page. First choose a name for your contact list and click **Save**. The list will then be listed on your Contacts page. To add contacts to your contact list you can add them one by one by clicking on **Add Single Contact,** or if you have a CSV (comma separated values) file containing your contact list, you can paste it in the text box provided and then click **Save Contacts**. If you have many contacts then that would be the quickest option by far. You could, for example, compose your contact list in Excel (or your chosen spread sheet application) by exporting the data for each contact you need and then save the file as CSV. If you open the file in notepad, for example, you can then copy and paste the file information into the textbox.

Once your contacts are added they will be listed in the contact list which shows all of the details held for each contact. Note that if a contact has opted out of Surveyi surveys then this will be indicated here. You can edit or delete individual contacts by clicking on the **Edit Contact** or **Delete Contact** buttons as required.

Designing your Invitation or Reminder

When your contacts are added as required then navigate back to your survey tracker group as follows:

My Surveyi -> Distribute

To prepare your invitation or reminder, click on the relevant buttons to open the designer page:
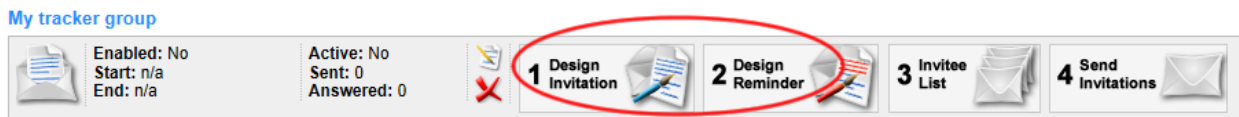
You can skip reminders if you don't plan to send any. The designer page is the same for invitations and reminders so this guide can be followed for both. At the top of the designer page you need to choose the email type. Surveyi supports three email types:

Plain text emails are small and can be read by any email reader but offer no formatting options.

HTML emails allow for formatting options such as a website might have and can include images, links and anything definable in HTML.

MIME emails are encoded with plain text and HTML. This is a good option if you want the presentation features of HTML along with the safety of plain text because the email reader will display which ever content the user prefers. You will need to set up both content types though before sending.

There is a default set of content defined in the email designer but you can modify anything you like:

- **Display From** information will be shown as who the email is from in the email reader of your invitee.
- The **Email Title** which will appear in the email reader of the recipient.
- **Survey Link Text** is for HTML or MIME emails only and is the text of the hyperlink in the email which links to your survey.

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The content edit options will vary depending on what type of email you have selected. If you have text email selected, the text editor window will be shown. If you have HTML email selected, the HTML editor will be shown and if you have mixed them both will be shown because they are both required for the email. For the HTML editor, if you prefer to edit the HTML code directly you can do so by clicking on the **HTML Code** button. If you would like to switch back to the HTML editor then click on **HTML Editor**.

To see how your email will look, click the **Update Preview** button underneath the content editor. The content is always displayed at the bottom of the screen in the **Preview** window, although the links won't quite work as they will in the final email because this is just an example. You can send a test email to check how your email will look in your email browser by clicking on the **Send Test** button. We recommend conducting more extensive testing by distributing emails to a test contact list but running through the full distribution process before sending out to your intended contact lists.

Email Templates

When you are happy with your email, you can save the invitation and the reminder in an **email template** which you can share with your Surveyi buddies (or you can see theirs if they have shared templates). Email templates are available from the **Email Templates** link on your user menu and can be edited by clicking on **Edit Invitation** or **Edit Reminder** buttons in the list. If you have invitation templates available they can be applied to your invitations by selecting them in the **My Invitation Templates** section at the top of the Design Invitation or Design Reminder page. Note that templates will overwrite what you have written for both invitations and reminders if applied.

Creating an Invitee List

To create a list of invitations you need to visit the **Generate Invitations** page by clicking on the relevant button on the **Response Group Options** page:
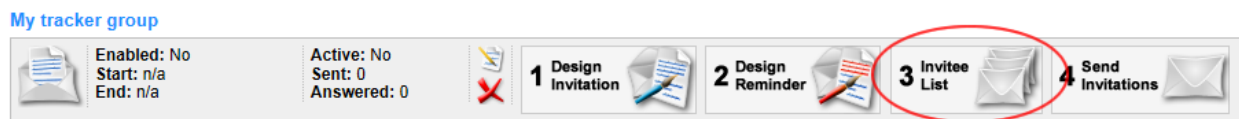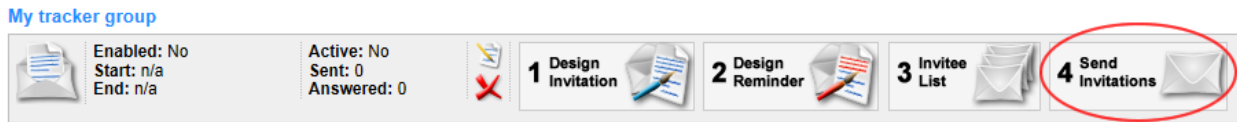

On the Generate Invitations page you can generate a list of invitations by selecting which contact lists to whom you would like to distribute emails. To select your contacts click the tick box in the **Select** column and click on **Generate Invites**. A list of invitations will be generated which do not overlap email addresses if a contact is listed twice or exists in two selected contact lists. It will also not generate an invite if one of your contacts has opted out of survey from Surveyi, or if the invitation already exists in your recycle bin. To check your recycle bin click on the **Recycle Bin** icon on your Survey Dashboard at the top of the page.

If you have any invitations in your recycle bin you can either restore them, or empty the recycle bin and then regenerate your invitations.

Distributing and Tracking Email Invitations

Once you have finished generating invitations you can click the back button to go to **Response Group Options** and you are now ready to distribute your emails. To do so click on the **Send out invitations** button:

If you have generated invitations on the **Generate Invitations** page you will see them listed here. The headings are as follows:

- **Name** – the name of your contact. Hold the mouse over it to see the email address.
- **Invites** – the number of invitations sent to this invitee.
- **Reminders** – the number of reminders sent to this invitee.
- **Last Sent** – the date a reminder or invitation was list sent.
- **Last Updated** – the last time this invite was updated.
- **Progress** – how far the invitee has progressed in the survey.
- **Score** – what the invitee has scored so far.
- **Bounced** – if the email has not reached its recipient it **may** be sent back to Surveyi, in which case this is indicated here with a red tick.
- **Opted Out** – if the contact has opted out of Surveyi surveys this is indicated here with a red tick.

You can manage your invitations here and remove those who have opted out for example. You can also filter the responses based on a range of factors including invites sent, survey progress, response content and even words within the responses. For more information see the Response Filtering guide.

You can also export the results in the data set if you would like to include them in any report or use third party applications such as Excel to rearrange the data.

To begin the send process you first need to select which invitees you would like to send invitations to. You can do this by making your selection in the **Send invitation emails to:** option list. Options are as follows:

All invitees in the response group – This sends invitations to every email in the entire response group invitation list regardless of whether the invitations have been filtered. If the invitation is there and the invitee has not opted out or the email bounced, then the email will be sent. A list of all invitations which would be sent if you were to click a send button now can be exported by clicking on the **Projected Invitation Report** button.

Only invitees in the above result set – If filters have been applied to the list above, only invitees now showing in the list will have emails sent to them. A list of all invitations which would be sent if you were to click a send button now can be exported by clicking on the **Projected Invitation Report** button.

Only selected invitees above – if you have manually selected invitees from the list above by clicking on the tick box to the left of the invitee, a report will be sent to only those invitees.

Once you have made your selection you can click on the **Send Invitations** or **Send Reminders** buttons to send invitations and reminders respectively. You can see the progress of the send in real time and a progress bar will appear. The result set above is also updated in real time and you will be able to see the **Invites** or **Reminders** increment accordingly.

Completing your Survey

As your invitees complete your survey you can view their progress in real time on this screen so you can track their response. You can view their responses so far by clicking on the buttons to the right of the list to download the response in PDF format for printing or distribution, or you can view the response in the survey as the invitee would see it.

Each invitee can save their progress if you have enabled the **Save** button for the survey in the Surveyi Appearance Designer. Once an invitee has completed the survey their response is locked and can only be reset if you remove the invite, empty your survey recycle bin and then regenerate the invitation. If the invitee clicks on the survey link after they have completed your survey they will either be shown your survey finish page if you have it enabled for this response group, or they will be redirected to the **Finish URL** which you have defined for this response group.

Response Group Options

Every response group type (Open Access, Private, Tracker) has certain features which can enhance the user experience, or tailor the group to suit your needs. These are listed below along with instructions on how to operate each feature and which response group types it applies to.

Popup Banner

Popup banners are available for open access and private group types. Popup banners are a way of collecting information from your website without directly publishing a link to your survey. Each popup displays an invitation to your website users inviting them to complete your survey and provides options for doing so or not.

The popup invitations are simply banners which appear over the top of your website at the location and frequency you specify. They do not appear in new browser windows and consequently they are relatively non-intrusive and are not affected by popup stoppers. This will allow you to collect information from the maximum audience possible from your website since popup stoppers are now common place (and effective).

To access the popup banner settings click the **Site Popup button** when editing the response group of your choice:

Options are as follows:

Popup Enabled - If you want to enable your site popup enable this option and click save.

Block after your survey is accessed - If your website user clicks the **Yes** button a cookie will be planted on their computer to ensure that the popup doesn't appear again for this response group if this option is enabled. The popup is set to expire after 800 days.

Close survey window when complete - Surveys appear in a new browser window or tab if your survey user clicks the **Yes** button. If you want to make it easier for them to get back to your web site which launched the survey then click this option to have the survey window (or tab) close upon completion. This is the most effective way to ensure that users do not leave your site after completing the survey.

Show survey logo - Show the logo attached to your survey in your popup invitation if it is defined in the Surveyi Appearance Designer.

Trigger popup after visits - You might not want to invite new users to your website to participate in a survey but instead wait until they have visited a few times or more. If this is the case you can specify the number of visits each user must have made to the page containing the Surveyi popup script.

Trigger popup again after visits - If a user clicks the **No** button for your invitation or clicks elsewhere on your survey, the invitation can appear again at a later stage. You can specify the number of further visits before triggering the popup here. This is a recurring count, which is reset each time the popup is shown to that user, and so it will keep appearing until the user clicks the **Never** button, or accesses your survey.

Button Text - Here you can specify the text of each button at the bottom of the invitation. Buttons are:

- o **Yes** – redirect the user to the survey
- o **No** – do not redirect the user to the survey this time
- o **Never** – do not show this window again

Width and Height - Specify the width and height of your invitation popup in pixels.

Border Width - Determine the width of the border running around the edge of your invitation popup. Enter 0 if you would not like a border to appear.

Position of from top - This value has a different effect depending on where the popup script is placed on your website. It represents the distance from the top of the web page, or the top of any element surrounding the script which has the style property **position: relative**. If you have no elements on the page containing the script with the relative position style property set, then this will be the distance from the top of the page. If you're not sure, just give it a go. You can always change any attributes on this page without needing to apply a new script line to your website with immediate effect. You could also try the popup on a test page prior to rolling it out onto your home page, for example, using the same popup script line.

Position of centre from left - This has the same effect as the position from top property except that that it also lets you choose a fixed distance from the left, or a percentage. If you choose a percentage then it is more likely that the popup will appear in the middle of your user's web browser – ie 50%. The distance here is the distance from the centre of the invitation rather than from the left side of the invitation. The reason for this is that it makes it easier to centre the invitation.

Colours - Specify the colours of the background, text and borders of your invitation popup. You can use the colour pickers provided but if you know a specific colour code you can enter it in the text box.

Button Style - Choose the style of the buttons appearing in the invitation window.

Popup Content - The message you would like to appear in the popup invitation. To edit the content directly in HTML click the **HTML Code** button. To switch back to the HTML editor click **HTML Editor**. Click **Update Preview** to view the content in the preview window below.

To apply the popup banner to your website all you need to do is copy the code from the **Code** window at the bottom of the page and paste it into your website preferably in the head section of your page.

Embed the Survey on your Website

Embedding is available for open access and private group types. Survey embedding allows you to put surveys straight into your own website without the need to leave your own website at all. To enable survey embedding click the **Embed Survey button** from the response group settings page for the response group you would like to apply the embedding to:

The options are as follows:

Embedding enabled - Tick or un-tick to switch off embedding for this response group and click **Save**.

Width and Height – Choose the width or height in pixels of the container frame for the survey.

Border width - If you would like a border around the frame containing your survey then you can specify one here. Enter zero for no border.

Border - Specify a colour for your border here which will apply if the border width is greater than 0.

Click **Update Preview** to see a preview of the frame and your survey within it. The preview will only appear if you have embedding enabled.

We recommend setting your survey to a fixed width in the Surveyi Appearance Designer for a more predictable result. Also, avoid using transparency in your survey design if you intend to embed it on your site, because it may produce strange results for older web browsers.

Response Group Settings

Private and tracker response groups have an extra settings page where you can specify a range of settings. To access response group settings click the **Response Group Settings** button on the list of response groups:
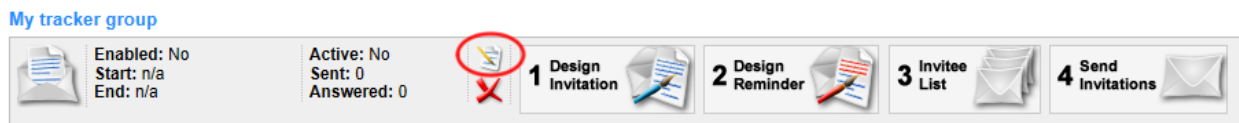
The following options are available:

Enabled - Click this option to enable or disable the response group if you no longer wish to use it for response collection.

Private/Tracker group selector - You can change the type of a response group after it has been defined, although if you have already published a web link it will no longer work after you change the type, unless you change it back again.

Web Address Customisation - You can customise the web address to include your company name, survey name or include SSL access for secure encrypted data collection. If you use SSL your survey users will see a padlock symbol on their web browser to indicate a secure connection while they access your survey. This will reassure them especially if you are asking them for sensitive information. If a survey user accesses your survey via the wrong link, they will automatically be redirected to the correct location (for example if they try to access http instead of https for a secure survey).

To change the web address settings, click on the tick boxes beneath the address label. Changes are only applied when you click **Save** at the bottom of the page.

Response Group Restrictions - These settings control when a response group is available. You can set a start and end date for availability here, and an optional time by clicking on the date text boxes and selecting a date from the popup calendar. If no start time is set, any time before the end time is considered valid. Likewise, if no end time is specified and time after the start time is considered valid for the response group to work.

You can also specify a response count. This will limit the number of responses a response group can receive. For example, if you are only interested in the first 100 responses, you can automatically display an off line page or redirect survey users who try to access the survey using this link.

For private response groups only there is an option to limit access to the survey to a single response so that once a user completes your survey they will no longer be able to fill it in again. This works by placing a cookie on the computer of the user. If the user uses a different browser or computer, they will be able to access your survey again. For this reason if you would like to absolutely ensure that users can only access their link once, be sure to use a **Tracker** response group type for which each link is unique per response.

All changes to these settings require you to click **Save** to store them. Otherwise click **Back** to cancel and go back to the Response Group Options page.

Collecting Responses in the Field

Online surveys are a great way to collect data but one of the biggest criticisms of them is that your entire result set will comprise only of internet users which can bias your results depending on what kind of information you are trying to collect. At Surveyi we have several facilities for you to collect data from those who do not have access to a computer and the internet.

Collecting Results using an iPad, iPhone, Smart Phone or Tablet PC

Surveys designed at Surveyi are compliant with iPads, Android based tablets and smart phones. All you need is a digital connection such as 4G, 3G (or less) and you can take your surveys out into the field to collect responses digitally. You can then access your survey via a standard web link from your device each time you want to collect a new response from someone you are interviewing. You can use response groups to categorise your responses and make shortcuts on your device to the web link for each response group.

Digital data collection is a highly useful approach for the following reasons:

- No data entry is required after you have finished collecting responses.
- Responses are instantly available for people at your office to view and analyse as they come in.
- No extra expensive custom technology is required.

Printing your Survey

If you prefer the more traditional approach for the actual data collection process you can print your survey for individuals to complete unsupervised and then hand in. This is ideal for placing in your waiting room, for example, for customers to complete while they wait for the service you provide.

You can still use Surveyi to enter your data by launching the survey and entering the data through either the open access or a private response group. This gives you the best of both worlds and allows querying, export and data analysis of the manually collected results.

To print your survey, access the **Distribute** page for the survey you would like to print from your **My Surveyi** user homepage and then click on Simple Mode (Open Access) and then the **Print** icon:

This opens the **Print Hard Copies** page which contains a link to a PDF download version of your survey. This version has space for your intended recipients to tick or write their responses and paginates the questions so that they don't overlap pages. Click on the **Download a PDF Survey** icon to download the file which should open in Adobe Acrobat if you have it installed. If not, it can be downloaded from www.adobe.com free of charge.

Once the file is opened in Adobe Acrobat select file and print from the menu and print as many copies as you like. Your survey styling is deliberately excluded from the print because it would restrict the styling options available for online prints, as websites rarely translate well to paper.

Entering Manually Collected Results

To enter manually collected data, launch your survey and enable the appropriate response group via the **Distribute** button on the survey for which you have data.

You will find a web address in the text box on the distribute page for open access. All you need to do is select the text, and copy it into the URL bar for your web browser. This will load your survey for you to enter the data. When you have completed the survey, just repeat the process for each response you would like to enter. All responses can then be analysed and queried along with any digitally collected responses you have.