



Surveys

2016 - Winter Edition

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Overview

The **Survey Manager** allows you to **create and distribute surveys** to your membership.

The following questions can be used for **surveys**:

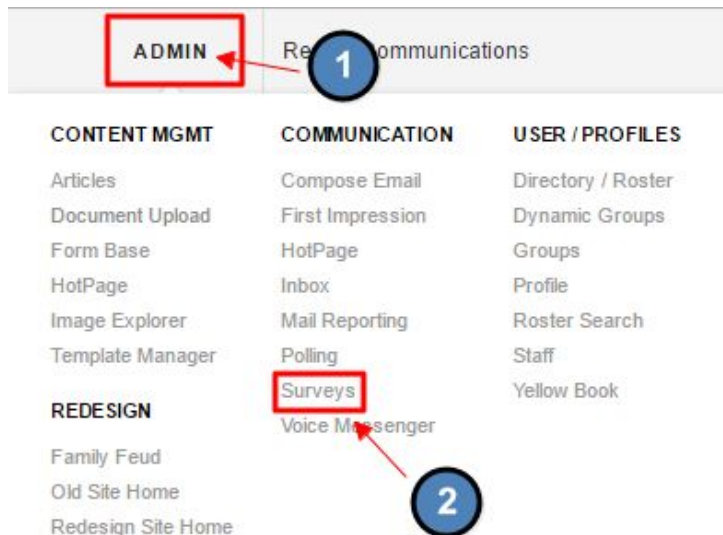
- Multiple choice
- Multiple select
- Fill in the blank
- True/False

Use Case(s)

Clubs looking to gain feedback or additional information from members within the website.

Accessing Survey Manager

Hover over the **Admin Bar**, click **Surveys** under Communication.



Note: The layout of where the **Survey Manager** is located may be slightly different based on club, but functionality is the same.

Creating a Survey



To **create a new survey**, select the **“Click here to add new survey”** link, and then **enter a name** for the survey and **description**.

SURVEY LISTING AND REPORTS

Survey Listing and Reports

Welcome to our Survey Manager. Use this service to build and distribute surveys, define and organize questions and responses and view survey results. Select the option below to add a new survey or choose an existing survey to preview, edit or view details.

Click a survey name to edit [Click here to add new survey](#)

Survey Name	Results	Sent To	Date	Issued	Completed	Send
1) 2009 Member Satisfaction Survey						<input type="button" value="Send"/>
		[Individual Users]	8/31/2006	1	1	
		[Individual Users]	10/4/2007	1	0	

This will launch the **Edit Survey** screen.

Edit Survey

Survey Listing and Reports | Edit Survey

Implement various response types easily, including multiple choice, true-false and text options, by selecting the appropriate options below. Preview your survey as often as necessary to view the survey exactly as respondents will receive it. Customize a survey's appearance by setting up Introduction Text with color and graphics using our Web editor tool. **Please note:** Editing a survey following distribution will change both distributed and completed surveys.

Survey Information

Name

Description

Start

End

Make Anonymous

Here you can add:

1. Name
2. Description
3. Start Date
4. End Date
5. Make Anonymous



Click **Save Survey** to continue.

EDIT SURVEY

[Survey Listing and Reports](#) [Edit Survey](#)

Implement various response types easily, including multiple choice, true-false and text options, by selecting the appropriate options below. Preview your survey as often as necessary to view the survey exactly as respondents will receive it. Customize a survey's appearance by setting up Introduction Text with color and graphics using our Web editor tool. **Please note: Editing a survey following distribution will change both distributed and completed surveys.**

Survey Information

Name	<input type="text" value="New Survey"/>	1
Description	<input type="text" value="Adding a New Survey"/>	2
Start	<input type="text" value="12/5/2016"/> 	3
End	<input type="text" value="01/06/2017"/> 	4
Make Anonymous	<input checked="" type="checkbox"/>	5

6

This will take you to the **Edit Survey** page where you may **add content** to the **survey**.

EDIT SURVEY


Survey Listing and Reports | **Edit Survey** | Distribution


Implement various response types easily, including multiple choice, true-false and text options, by selecting the appropriate options below. Preview your survey as often as necessary to view the survey exactly as respondents will receive it. Customize a survey's appearance by setting up Introduction Text with color and graphics using our Web editor tool. **Please note: Editing a survey following distribution will change both distributed and completed surveys.**

Survey Information Preview Survey Save Survey Copy Survey

Name

Description

Start 

End 

Make Anonymous

Introduction Header Edit Introduction
Please complete the survey below.

Confirmation Edit Confirmation

Thank you for participating in our survey.

Questions Add Multiple Choice Add True/False Add Text Add Header Text

No questions attached to this survey

Save Survey Return to Listing Delete Survey

* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.

Add Multiple Choice Add True/False Add Text Add Header Text

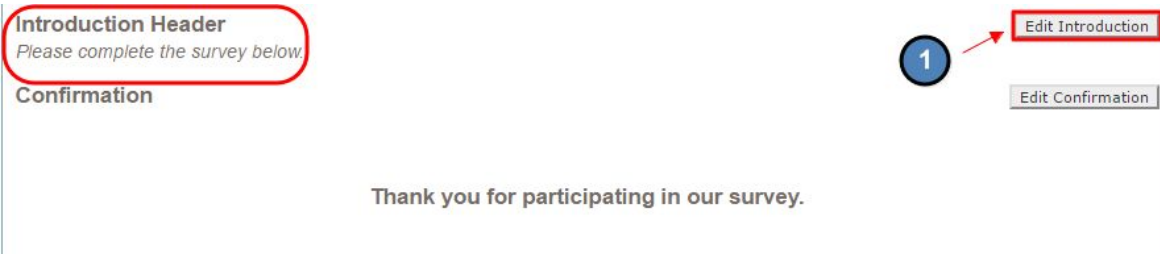
You may add an **Introduction Header** to the **Survey** with any additional information on the **Survey**.

Click the **Edit Introduction** button to launch the **Editor**.

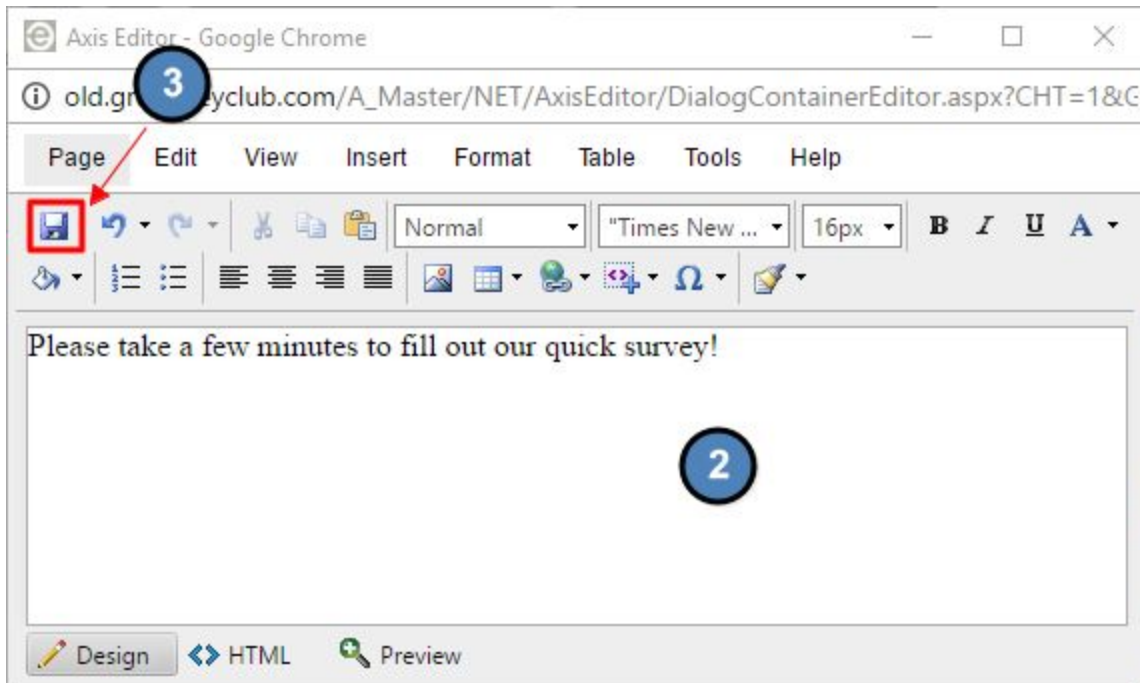
Introduction Header Edit Introduction
Please complete the survey below.

Confirmation Edit Confirmation

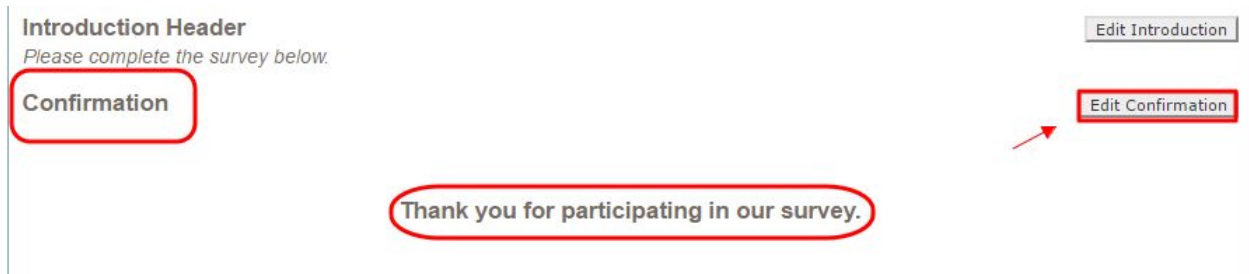
Thank you for participating in our survey.



In the **Editor**, you may add text and imagery. **Save** once complete.



Click the **Edit Confirmation** button to launch the **Editor**. The **Confirmation** message will appear once a member has filled out and submitted their **Survey**.



Adding Questions

Next, you may start **Adding Questions** to the **survey**.



Questions Add Multiple Choice Add True/False Add Text Add Header Text

No questions attached to this survey

Save Survey Return to Listing Delete Survey

* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.

Add Multiple Choice Add True/False Add Text Add Header Text

The **Survey** consists of 3 types of **questions**:

- Multiple Choice
- True/False
- Text Questions

To **Add a Multiple Choice Question**, click the **Add Multiple Choice** button.



Questions Add Multiple Choice Add True/False Add Text Add Header Text

No questions attached to this survey

Save Survey Return to Listing Delete Survey

* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.

Add Multiple Choice Add True/False Add Text Add Header Text

Multiple Choice questions allow you to enter up to **5 answers** and offer the ability to select **more than one answer** by **checking** the corresponding **check box** below the **question text**.

If you need to have **more than 5 answers** for a **multiple choice question**, you can **save** the **question** with the **first 5**, and then you can **select the link to add more answers**.

Click Save once finished.

Survey Manager - Edit Question

Enter the question text, and enter the possible answers to be displayed, then click the Save button when finished. Answer fields left blank will be discarded.

Type **Multiple Choice**

Question

Allow user to select more than one answer

Answers

Show?	Answer Value	Votes	Remove
<input checked="" type="checkbox"/>	<input type="text" value="Excellent"/>	0	[X]
<input checked="" type="checkbox"/>	<input type="text" value="Good"/>	0	[X]
<input checked="" type="checkbox"/>	<input type="text" value="OK"/>	0	[X]
<input checked="" type="checkbox"/>	<input type="text" value="Poor"/>	0	[X]
<input checked="" type="checkbox"/>	<input type="text" value="Terrible"/>	0	[X]

[\[Click here to add another answer field\]](#)

SAVE REMOVE QUESTION RETURN TO QUESTIONS

To **Add True/False**, click the **True/False** button.

Questions

No questions attached to this survey

* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.

True/False only allow you to enter question text.

Click Save when finished.

SURVEY MANAGER - ADD QUESTION

Enter the question text, and enter the possible answers to be displayed, then click the Save button when finished. Answer fields left blank will be discarded.

Type: True / False

Question: Would you return?

Answers: True, False

Buttons: Save, Return to Questions

To **Add Text**, click the **Add Text** button.

Buttons: Add Multiple Choice, Add True/False, Add Text, Add Header Text

Buttons: Save Survey, Return to Listing, Delete Survey

Add Text only allow you to enter question text.

Click the Save button when finished.

SURVEY MANAGER - ADD QUESTION

Enter the question text, and enter the possible answers to be displayed, then click the Save button when finished. Answer fields left blank will be discarded.

Type: Text Answer

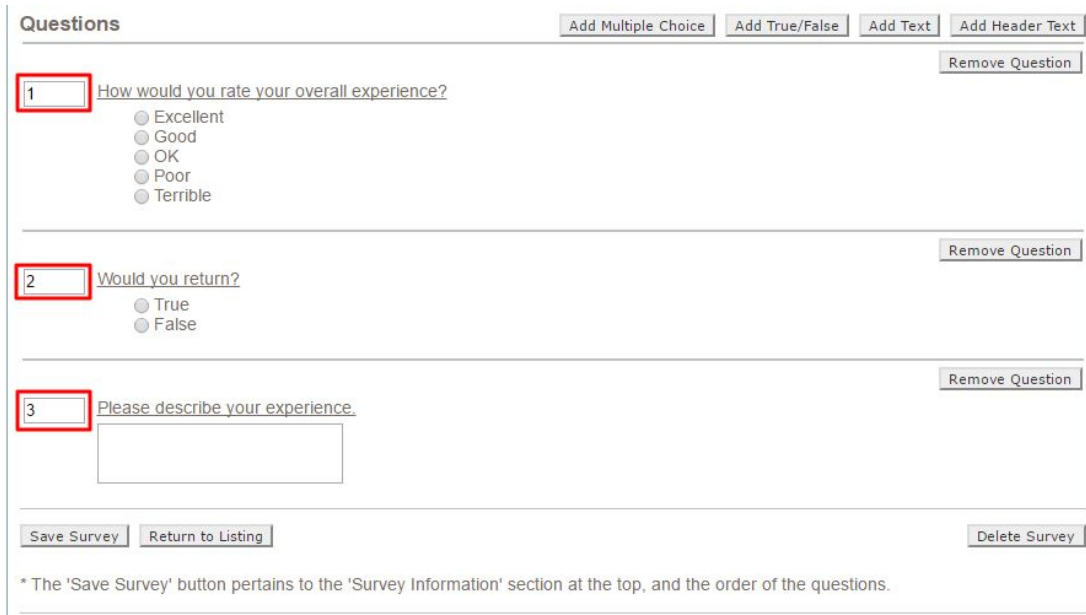
Question: Please describe your experience.

Answers: A text box will be provided for user's answer

Buttons: Save, Return to Questions

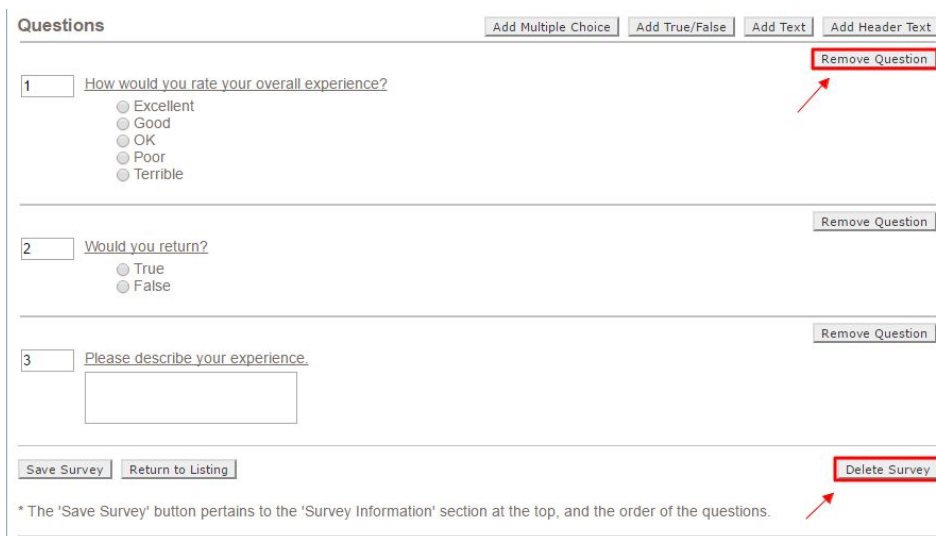
Question Organization

You can **reorder questions** by **entering the question number** you would like it to be, while also **changing the number of the question** it will be replacing.



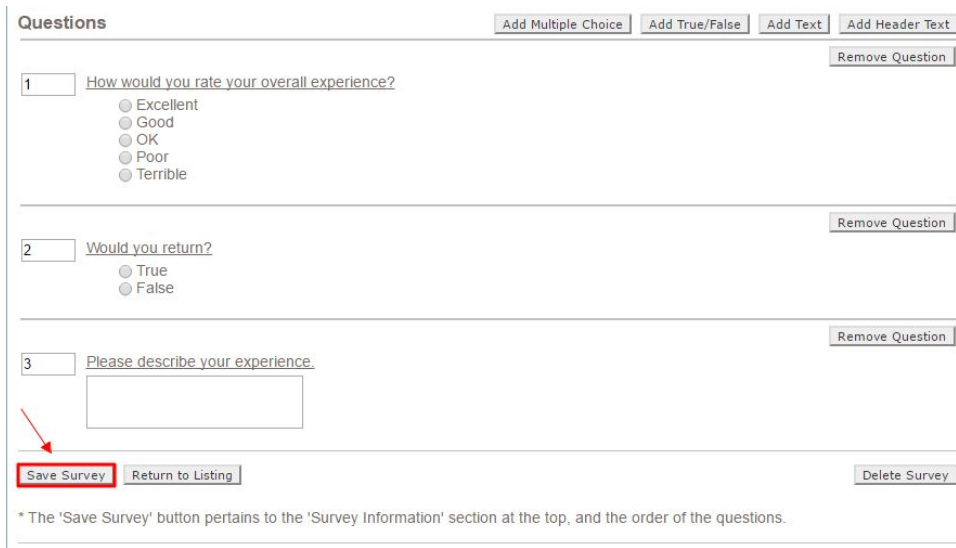
The screenshot shows a 'Questions' management interface. At the top, there are buttons for 'Add Multiple Choice', 'Add True/False', 'Add Text', and 'Add Header Text'. Below these are three questions, each with a 'Remove Question' button to its right. The first question is 'How would you rate your overall experience?' with a radio button list: Excellent, Good, OK, Poor, and Terrible. The second question is 'Would you return?' with radio buttons for True and False. The third question is 'Please describe your experience.' with a text input field. At the bottom, there are buttons for 'Save Survey', 'Return to Listing', and 'Delete Survey'. A note at the bottom states: '* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.'

From here, you may also **Remove Questions** by click **Remove Question**; or **Delete** the entire **Survey**.



This screenshot is identical to the one above, but with red boxes and arrows highlighting the 'Remove Question' button for the first question and the 'Delete Survey' button at the bottom right. A red arrow also points to the 'Remove Question' button for the first question.

Once changes are complete, you can **click “Save Survey”** to **save** your changes.



Questions Add Multiple Choice Add True/False Add Text Add Header Text

1 How would you rate your overall experience?
 Excellent
 Good
 OK
 Poor
 Terrible

2 Would you return?
 True
 False

3 Please describe your experience.

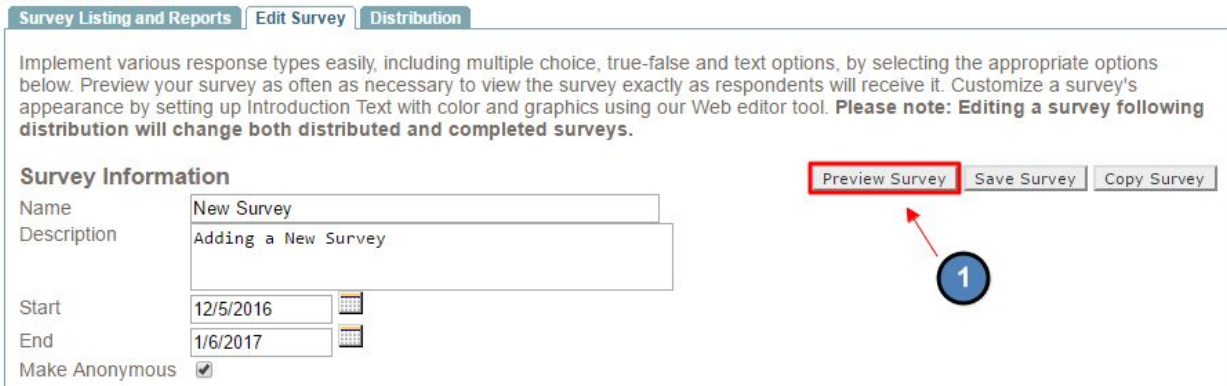
Save Survey Return to Listing Delete Survey

* The 'Save Survey' button pertains to the 'Survey Information' section at the top, and the order of the questions.

Previewing Survey

You can **preview** your **survey** by **clicking** the **“Preview Survey”** button before distributing the **survey**.

EDIT SURVEY



Survey Listing and Reports **Edit Survey** **Distribution**

Implement various response types easily, including multiple choice, true-false and text options, by selecting the appropriate options below. Preview your survey as often as necessary to view the survey exactly as respondents will receive it. Customize a survey's appearance by setting up Introduction Text with color and graphics using our Web editor tool. **Please note: Editing a survey following distribution will change both distributed and completed surveys.**

Survey Information

Name New Survey

Description Adding a New Survey

Start 12/5/2016

End 1/6/2017

Make Anonymous

Preview Survey Save Survey Copy Survey

This will pull the **survey** as it will show to members.

NEW SURVEY

Survey Description: Adding a New Survey

Please take a few minutes to fill out our quick survey!

How would you rate your overall experience?

- Excellent
- Good
- OK
- Poor
- Terrible

Would you return?

- True
- False

Please describe your experience.

Distributing Survey

Click the **"Distribution" tab** to set up **distribution**.

EDIT SURVEY

[Survey Listing and Reports](#) [Edit Survey](#) [Distribution](#)

Next, click the “Click here to send this survey to a new group of users” link.

VIEW DISTRIBUTIONS



Survey Listing and Reports | Edit Survey | Distribution

Survey New Survey

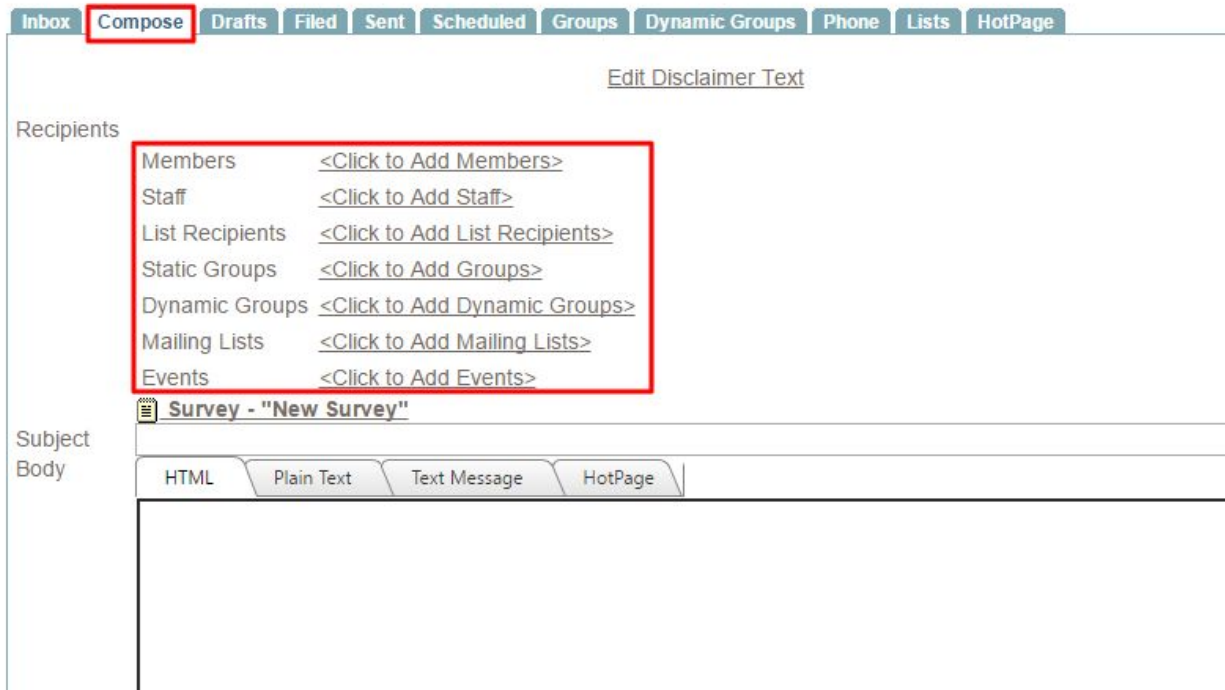
[Click here to send this survey to a new group of users](#)

This survey has been distributed to the following groups/people:

Recipients	Date Sent	Sent By	Issued	Unopened	Opened	Completed
(survey has no distributions)						

You will now be taken to the **Blast Email Module** where you may **select recipients and compose an email**. The **Survey** will attach to the bottom of the **email** automatically.

INBOX



Inbox | **Compose** | Drafts | Filed | Sent | Scheduled | Groups | Dynamic Groups | Phone | Lists | HotPage

[Edit Disclaimer Text](#)

Recipients

- Members [<Click to Add Members>](#)
- Staff [<Click to Add Staff>](#)
- List Recipients [<Click to Add List Recipients>](#)
- Static Groups [<Click to Add Groups>](#)
- Dynamic Groups [<Click to Add Dynamic Groups>](#)
- Mailing Lists [<Click to Add Mailing Lists>](#)
- Events [<Click to Add Events>](#)



Subject: **Survey - "New Survey"**

Body: HTML | Plain Text | Text Message | HotPage

Viewing Results

Once the **Survey** is sent out and **completed** by your members, you can go back to the **Survey Manager** to **view the results**.

In the **Survey Manager**, **click the image of the bar chart**, and then **select your distribution or all distributions**.

	Survey Name	Results	Sent To	Date	Issued	Completed	Send
1)	2009 Member Satisfaction Survey						<input type="button" value="Send"/>
			[Individual Users]	8/31/2006	1	1	
			[Individual Users]	10/4/2007	1	0	

You can then **view the results**.

SURVEYING RESULTS



2009 Member Satisfaction Survey

[<< Back To Survey Manager](#)

There are 2 total distributions for this survey

Displaying all Distributions for this Survey

Show All Distributions ▾

Click on a choice to view detailed results

Question	Responses
Who is your choice for the President of the Board	6
Please select 4 members for the Board of Directors. Please only select 4	26
Who is your choice for the club Treasurer?	6
Type question here	1
We would like your comments	0
Please vote for Club Treasurer:	0

Click on each question to receive detailed results for each.

[Show Graph](#)

Click on a choice to view detailed results

Answer	Responses	% of Total
President 1	1	16.66%
President 2	3	50%
President 3	2	33.33%
President 4	0	0%
	0	0%

You can **select the "Show Graph" link** to view a **chart** of the **results**.

[Show Graph](#)

Click on a choice to view detailed results

Answer	Responses	% of Total
President 1	1	16.66%
President 2	3	50%
President 3	2	33.33%
President 4	0	0%
	0	0%

Graph Results:

SURVEY QUESTION DETAIL



Who is your choice for the President of the Board

[Show List](#)

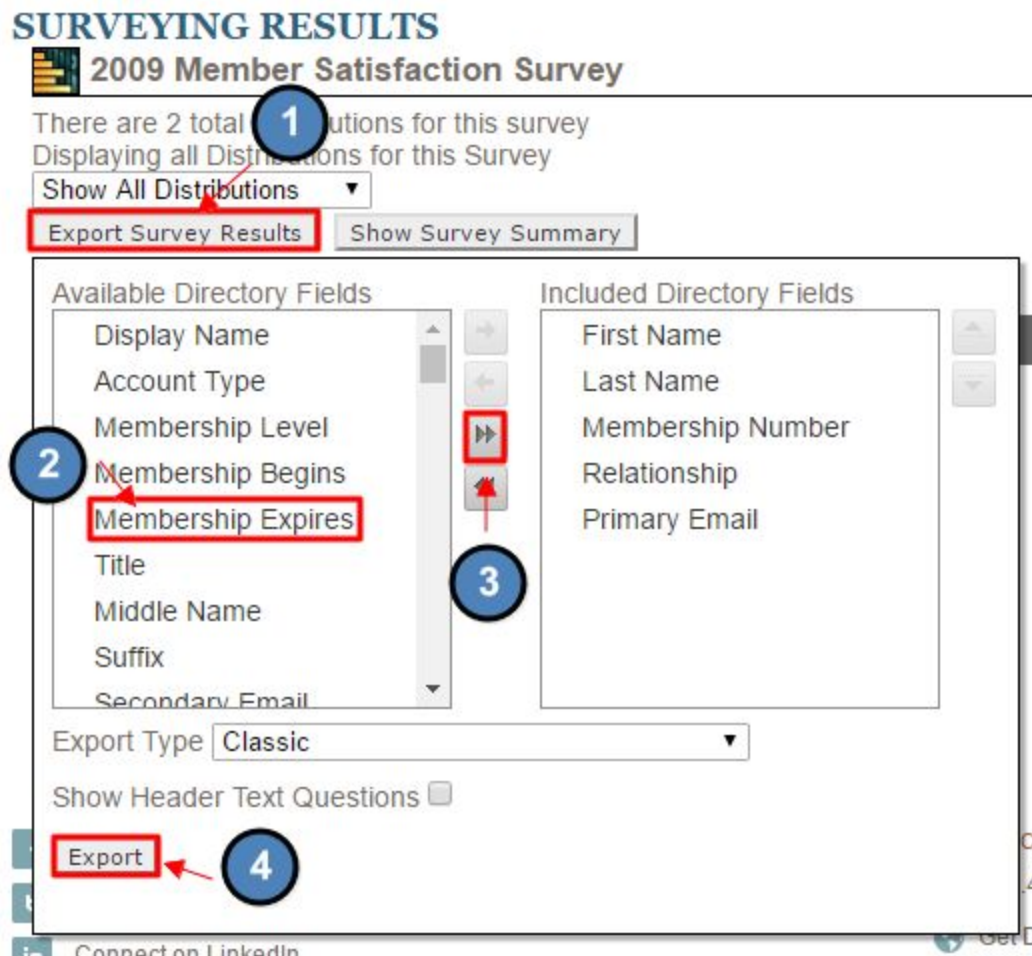
Click on a choice to view detailed results



Exporting Results

You can also **export survey results** by **clicking the button under the distribution select drop down on the Survey Results page**. You can then **select what details** about the **member** you would like to include in the **export**. Next, **select your Export Type**:

- Classic
- One Record Per Line, Choices Ungrouped
- One Record Per Line, Choices Grouped



SURVEYING RESULTS

2009 Member Satisfaction Survey

There are 2 total distributions for this survey
 Displaying all Distributions for this Survey

Show All Distributions ▼

Export Survey Results Show Survey Summary

Available Directory Fields

- Display Name
- Account Type
- Membership Level
- Membership Begins
- Membership Expires
- Title
- Middle Name
- Suffix
- Secondary Email

Included Directory Fields

- First Name
- Last Name
- Membership Number
- Relationship
- Primary Email

Export Type Classic ▼

Show Header Text Questions

Export

You can also select the **“Show Header Text Questions”** checkbox if this information is relevant. They are **excluded by default**.

Then **click the Export button** and a **.CSV file** will be **downloaded** and can be opened in **Excel**.

FAQs

Q: My **survey** is **anonymous**, can I change that?

A: Yes, whether or not a **survey** is **anonymous** can be changed after it has been created and distributed, but you will need to reach out to your Support Team to have this change implemented

Q: Can my **survey** be displayed on a page, rather than sent in an email?

A: Yes! This can be done. You will need to reach out to your Support Team to create this distribution for you.

Q: Can my **survey** be open to the public?

A: No

Q: Can users take the **survey** multiple times?

A: No. A user can fill out the **survey** for a second time, but their results will not be recorded or overwritten.

Q: Why are members required to log in to the site even if the **survey** is **anonymous**?

A: Members are required to log in to the site because **surveys** cannot be accessed by the public. While the results from the **survey** will be **anonymous**, whether or not they have completed the **survey** will still be tracked.

Best Practices

1. **Surveys** are often more effective if made **anonymous**, so members can answer more honestly.
2. Try to keep **surveys** short, which will encourage members to take **surveys**. Longer **surveys** are time consuming and can be cumbersome, which can deter members from filling them out.