EFM

User Guide

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Customer Engagement Solutions™

Contents

About this guide

The EFM User Guide provides instructions about how to use the EFM application.

Intended audience

This guide is designed for:

- Anyone responsible for planning and setting up systems.
- Anyone responsible for system administration and maintenance.
- Anyone using the product.

Documentation feedback

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- Your suggestion for correcting or improving the documentation

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Document revision history

Revision	Description of changes
1.00	Added all changes included in the EFM Release Notes.
1.01	Added details of Schedule Case Exports and Randomize and Rotate survey questions in a page.

Chapter 1

Getting Started

Topics

Getting Started overview

To start your survey process, click Survey designer overview, page 226.

To learn more about the product, visit the following topics:

- Question Types, page 1
- My Surveys grid, page 169
- Video Library, page 1
- Documentation Library, page 1

What's New

What's new in EFM 15.3 FP2, page 1

Verint Resources

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- For technical support
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System Requirements

Designing surveys

EFM is a web-based application that requires the following to design surveys:

- Internet Explorer 11+
- Microsoft Edge
- Safari (most recent version)
- Chrome (most recent version)
- Firefox Quantum (most recent version)

Taking surveys

These are based on what is currently verified (other browsers are likely to work as well).

For Windows:

- Internet Explorer 8+
- Microsoft Edge
- Chrome (Current – 1 version)
- Firefox Quantum (Current – 1 version)
- Opera (Current – 1 version)

For Mac:

- Safari (Current – 1 version)
- Chrome (Current – 1 version)
- Firefox Quantum (Current – 1 version)

For iOS:

- Safari (Current – 1 version)

For Android:

- Chrome (Current – 1 version)

Current – 1 version denotes that we support the current stable version of the browser and the version that preceded it. For example, if the current version of a browser is 24.x, we support the 24.x and 23.x versions.

Other requirements

- A minimum screen resolution of 1024 x 768 is required
- Administrative rights required to install ActiveX component on first use
- A minimum screen width of 1280 is required to access all functionality

Chapter 2

Login

Topics

Login page

To log in to the EFM application, type your user name or email address in the box, then click **Next**. Type your password in the box then click **Login**.

You should use a unique email address to log in to the EFM application. If the email address is assigned to two or more accounts, then you need to enter your user name or contact a System Administrator.

If you forget your password, click **Forgot Password**. For more information, see Reset password, page 54.

If you type incorrect user name, email address, or password, an error message appears notifying you how many attempts are left before you are locked out. You have 25 incorrect login attempts. If your account has been locked out, contact your system administrator to unlock it. After unlocking, your password remains the same.

If you try to access the EFM application by using an unsupported browser or without enabling cookies in your browser settings, you are redirected to the **Unsupported Browsers** page. For more information about supported browsers, see System Requirements, page 51.

Reset password

You can reset your password.

Procedure

1. In the **Customer Login** dialog box, click the **Forgot Password** link.
2. In the **Forgot Password** window, type your user name or email address in the **User Name or Email** box, and then click **Send Password**.

   The email message with password recovery link is sent to your email address.
3. In the received email message, click the link.
4. In the **Password Reset** dialog box, type your new password in the **Password** and the **Confirm Password** boxes.
5. Click **Login**.

Your password is now reset and you are automatically logged into the EFM.

Update password

If your password does not meet the latest security requirements or is set to expire in a certain number of days by the administrator, the **Update Password** page opens right after you type your user name and password. In this case, you will be asked to create a new password that meets the defined criteria—the password must be at least 8 characters long and include at least one lowercase letter, one uppercase letter, one digit, no spaces, and no user name.

Procedure

1. On the **Update Password** page, type your old password in the **Password** box.
2. In the **New Password** and **Confirm Password** boxes, type your new password that meets the defined criteria.
3. Click **Continue**.

> If your password does not meet the security requirements, you cannot log in to the EFM application until you update the password.

Interstitial page

An interstitial page, if set by the administrator, appears right after you log in to the EFM application and if the language or time zone is not specified.

The interstitial page often includes:

- List of all the newly added features and bug fixes
- Notification about the scheduled maintenance tasks
- An alert from Account Management that it is time to renew your account.

If you want to hide the interstitial page, in the upper-right corner of the page, click the **Don't show this message again** link.

> If the language or time zone is not specified, the **Preferences** page is displayed after you close the interstitial page.

If you want to proceed to the application, click **Continue on to the application**.

Preferences page

Navigation

Log in to the EFM application > click **Continue on to the application** (if the interstitial page appears).

The **Preferences** page appears right after you log in to the EFM application or after clicking the **Continue on to the application** link on the interstitial page if this page appears.

On the **Preferences** page, you can select the language and time zone for your account.

> The **Preferences** page appears if the administrator did not select the language or the time zone for your account.

If you want to select the language, on the **Display the application in this language** menu, select the needed language.

If you want to select the time zone, on the **Preferred Time Zone** menu, select the needed time zone.

If you want to proceed to the EFM application, click **Continue**.

Chapter 3

Dashboards

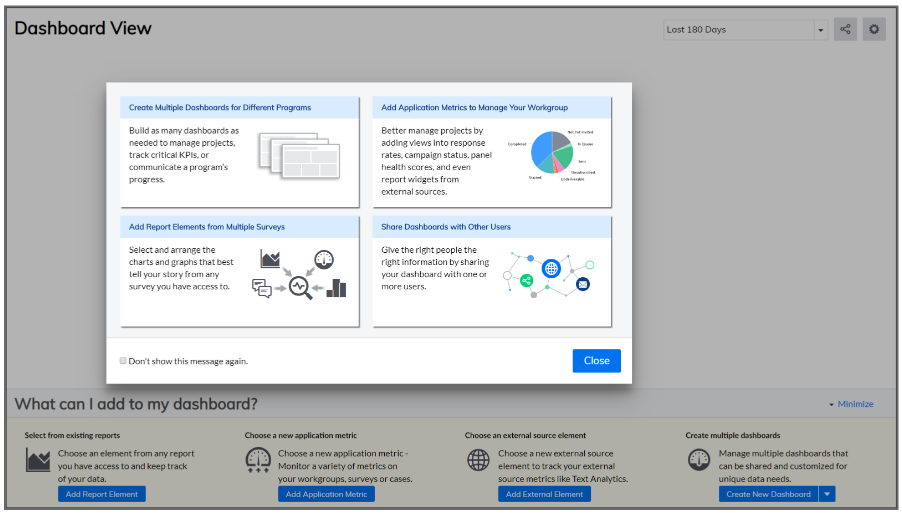
Topics

Dashboard Home Page

Navigation

Dashboards tab .

You can create dashboards, add elements to your dashboards, and view the data that you are interested in. You can also duplicate, share, and delete the dashboards and change the dashboard theme.



The Dashboard View

The following options are available on the dashboard home page:

- **Duplicate** – Click the link to duplicate the current dashboard. Click the link to edit dashboard name and to select dashboard theme.
- **Share** – Click the link to share your dashboard with other users.
- **Change theme** - Click to change the theme of the dashboard.
- **Edit Filters** (available for advanced dashboards) - Click to create your own user filters based on specific survey questions and hierarchical filters.
- **Delete** - Click to delete the dashboard.
- **Filter by date** – Click the drop-down arrow to filter the dashboard to view the information for a specific time period.
- **Add Report Element** – Click the button to select an element from any report you have access to and to add it to the dashboard to view the data.
- **Add Application Metric** – Click the button to add and view a variety of metrics that cover the entire workgroup and all surveys.
- **Add External Element** – Click the button to select an element from the external source and to add it to the dashboard to view the data.
- **Create New Dashboard** – Click the button to add a new dashboard.

- **Advanced Dashboard** - Click the arrow next to the **Create New Dashboard** button, and then click **Advanced Dashboard** to add a new advanced dashboard. For more information, see Create advanced dashboard, page 66.

You can add and manage dashboards that can be shared and customized for unique data needs.

You can minimize the **What can I add to my dashboard** section if your dashboard contains no elements. If there are elements added, the bottom section is minimized automatically when you access the dashboard next time. Click the **Expand** link to show the **What can I add to my dashboard section** again.

Display dashboard home page after login

Navigation

Account menu  > **My Account** page.

You can make the dashboard home page displayed right after you log in to the EFM application. If your dashboard home page contains several dashboards, the last viewed dashboard is displayed.

Procedure

1 In the upper-left corner of the page, click the **My Account** link.

2 On the **Settings** tab, in the **Define Log-on Experience** section, select the **Display dashboard after login** check box, and then click **Save**.

3 In the upper-left corner, click the **Return to Main Tab** link.

The dashboard home page is displayed.

> When both the **Display dashboard after login** and the **Remember the last selected survey project on login** check boxes are selected, the dashboard home page is displayed after login.

Grant access to dashboard home page

Navigation

Administration tab > **Roles** tab.

Group administrator can control the workgroup access to creating dashboards and viewing them based on the user role.

By default, access to the dashboard home page is granted to the user roles that have access to view and edit reports. You can grant access to the dashboard home page for other roles when creating or editing these roles.

Procedure

1. On the **Roles** page, click the needed role.
2. On the **Edit Role** page, in the **Experience** section, select the **View Dashboards** check box, and then click **Save**.

Create dashboard

Navigation

Dashboards tab > **Create New Dashboard** button.

You can create dashboards with report elements and workgroup metrics to track your data.

Procedure

1. At the bottom of the page, click **Create New Dashboard** button.
2. In the **Name Your Dashboard** dialog box, type the name of the dashboard in the **Dashboard Name** box, and then click **OK**.

> You can change the order of your dashboards by dragging the dashboard tabs to the appropriate locations.

Create advanced dashboard

Navigation

Dashboards tab > **Dashboard View** tab > **Create New Dashboard** list > **Advanced Dashboard** option.

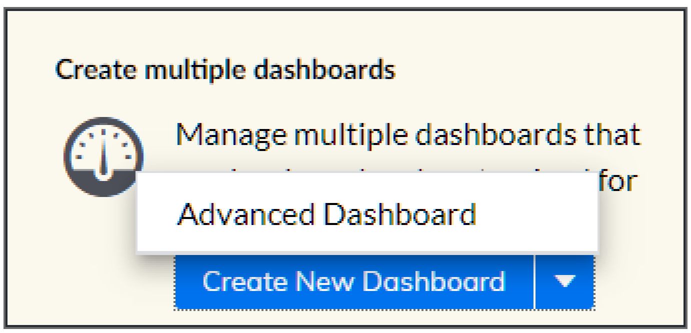
With **Advanced Dashboard**, you can add custom filters to your dashboard and use the collected data more effectively. For more information, see Add user filters, page 67.

Report elements and application metrics added to **Advanced Dashboard** reflect only the data related to the Unified Data Set projects, surveys, comments, profiles, file imports, Speech Analytics project, and data sets which are selected when creating the dashboard.

Panel Health Score is not available for the **Advanced Dashboard**.

Procedure

1. At the bottom of the **board View** page, click the arrow next to the **Create New Dashboard** button, and then click **Advanced Dashboard**.



The Advanced Dashboard option

2. In the **Select Project for the Dashboard** dialog box, in the **Dashboard Name** box, type the name for your advanced dashboard.
3. In the projects list, click the project that you want to add, or search for it by typing its name in the search box.
4. Click **OK**.

Add user filters

Navigation

Dashboards tab > icon > **Edit Filters** option.

With **Advanced Dashboard**, you can create your own user filters based on data sets, comment cards, file imports, specific survey questions, and hierarchical filters based on **Organization/Employee External ID** questions to filter your dashboard data. For example, you can set up a filter to view which terms are used by the promoters of your product (based on your Net Promotion Score question).

> User filters do not apply to external elements, such as Text Analytics, Feedback Intelligence, or External Content application metric.

You can create filters for the following questions: **Organization External ID**, **Employee External ID**, **Choose One**-based (**Choose One**, **Choose One with Image**, **Matrix Choose One**, **Rank Order**, **Drag and Drop Rank Order**, **Scale Slider**, and **Scrolling Matrix**), **Choose Many**, **Matrix Choose Many**, **Short Answer**, **Matrix Short Answer**, and **Fill in the Blank**.

Custom filters are available only for the questions from the survey that is selected when creating the **Advanced Dashboard**.

You can also create filters based on data points.

> You cannot add filters based on the survey or data set that is still in the design mode.

Procedure

1. On the menu, click **Edit Filters**.
2. In the filter editing area, click **Add User Filters**.
3. In the **Add User Filters** dialog box, on the **Source** menu, select source data for your filter.

   You can choose data from the **Current Survey**, **Columns** (**Participant Information**, **Respondent System Information**, or **Respondent Location**), or **Profiles** (**Basic Information**).

> For comments project type, on the Source menu, you can choose data from **Comment Cards** (**Default Questions**, **Custom Questions**, **Custom Variables**) or **Columns** (**Participant Information** or **Respondent System Information**).

4. In the **Question (Field)** list for surveys or **Data Point** list for data sets, select the question, field, or data point that you want to use for filtering.

> For comments project type, on the **Question (Field)** menu, you can select the question or field for filtering that depends on the source data selection.

5. In the **Display Label** box, type the name for your filter that will be displayed on the dashboard.

> If you selected **Organization External ID** or **Employee External ID** question, go to step 6. You cannot specify filter options for this type of filtering.

6 Specify the filter options:

- For **Choose One** and **Choose Many**-based questions only, from **Filter Options**, select the choices to be used as filter options. By default, all choices are selected.
- To add more filter options (for **Short Answer**, **Matrix Short Answer**, **Fill in the Blank**, **Choose One**-, and **Choose Many**-based questions):

a. Click the **Add Option** link.

b. In the **Add Filter** dialog box, type the name for your filter option in the **Name** box.

c. Click the **Add Another Criteria** link, and then define the criterion to be used as the filter option. To combine multiple criteria, use the criteria builder advanced options. The criteria are defined only for the question or side selected in step 6. You can create as many additional options as needed.

> If you want to edit the added filter option, just click its link and make the needed edits in the criteria builder.

7 Click **Add Filter**.

The filter is now added as a drop-down menu next to the date filter; selected choices and defined criteria are displayed as filter options in the drop-down menu. To filter the dashboard data, select the needed filter option.

> With the filter based on the **Organization External ID** question, you can filter by the available organizations. With the filter based on the **Employee External ID** question, you can filter by the available organizations and users.

8 To edit or delete the filter, click the **Edit Filter** link, and then click the gear icon or delete icon correspondingly next to the needed filter.

> If you share the **Advanced Dashboard** with other users, they can view and use the filters you created. The items available in the hierarchical filter depend on the user's position in the hierarchy.

Delete a dashboard

Navigation

Dashboards tab > **Dashboard View** tab.

You can delete any dashboard that you do not need anymore.

Procedure

1. In the Dashboard View menu, click for the dashboard which you want to delete.
2. In the confirmation message, click **Delete**.

> If there is only one dashboard, you cannot delete it, but you can delete its elements by clicking **Delete** in the element list.

Managing Dashboard items

Navigation

Dashboards tab  > **Dashboard View** tab.

You can change the item size, edit the item title, delete the dashboard items, and access their source by using the dashboard item drop-down menu.

You can use the following options in the dashboard item drop-down menu:

- **Edit Title** – Edit the title of the dashboard item to change the survey question or describe what the corresponding dashboard item represents.
- **Resize** – Change the size of a dashboard item to optimize the displayed content within the dashboard.
- **Go to Report** – Access the full report from which the dashboard item is inserted. This functionality is available for the report elements only.
- **Edit** – Change the dashboard element settings, such as source, data, or date filter. This functionality is available for the external elements only.
- **Delete** – Remove unnecessary items from the dashboard.

For the steps on how to delete the dashboard items, see the Deleting dashboard Items, page 73.

Change the Width of a Dashboard Item

Procedure

If the dashboard item does not support the specific size, the "Resize" option is unavailable.

1. Click the arrow in the upper-right corner of the needed dashboard item.
2. In the drop-down menu, point to **Resize** > Width, and then select the percentage you want. The available options are 33%, 50%, 66%, and 100%. The default size depends on the type of the element. The dashboard item is updated immediately.

Change the Height of a Dashboard Item

Procedure

1. Click the arrow in the upper-right corner of the needed dashboard item.
2. In the drop-down menu, point to Resize > Height, and then select the size you want. The available options are 1x, 2x, and 3x. The default size depends on the type of the element. The dashboard item is updated immediately

Rename a Dashboard Item

Procedure

1. Click the black down arrow in the upper-right corner of the needed dashboard item.
2. In the drop-down menu, select the "Edit Title" option. The **Enter new title** dialog box opens.
3. Edit the name of the dashboard item.
4. Click **OK** to save the changes.

Access the Source Report from the Dashboard Item

Procedure

> The "Go to Report" link is only available for the dashboard elements that are added from the reports.

1. Click the black down arrow in the upper-right corner of the needed dashboard item.
2. In the drop-down menu, select the "Go to Report" option. The related report opens on the page where the report element source is located. If you have the Edit access to the report, the report opens in **Preview** mode of the report designer. If you have the View access, the report opens in a new window for preview.

Edit a Dashboard Item

Procedure

> The "Edit" link is only available for the external dashboard elements.

1. Click the arrow in the upper-right corner of the needed dashboard item.
2. In the drop-down menu, select the "Edit" option. The **Edit Report Element** dialog box opens.
3. Edit the external element settings.
4. Click **OK** to save the selected changes. The dashboard item is updated immediately.

Dragging dashboards

Navigation

Dashboards tab  > **Dashboard View** tab.

You can change the order of dashboards on the toolbar by using the drag-and-drop functionality. The location changes of dashboards are saved across the sessions.

Procedure

1 On the home page, hover over the dashboard tab that you want to drag.

2 When the pointer becomes a four-headed arrow, drag the pointer to move the dashboard tab to the appropriate location.

Deleting dashboard Items

Navigation

Dashboards tab  > **Dashboard View** tab.

You can delete any item from the dashboard. If you delete the dashboard item from the report, it will no longer show on the dashboard.

Delete an Item from the dashboard

Procedure

1. Hover over the arrow in the upper-right corner of the needed dashboard item.
2. On the drop-down menu, select the **Delete** option. The confirmation dialog box opens. See images below.
3. Click **Delete**. The dashboard item is deleted from dashboard.

Sharing a dashboard

Navigation

Dashboards page > click the needed dashboard > menu.

You can share your dashboards for viewing with other users, organizations, and groups as well as they can share theirs with you.

This functionality is available only if you have the **Share Dashboards** permission enabled.

You can restrict sharing all dashboards by clearing the **Share Dashboards** check box on the **Administration** page > **Roles** tab.

If you clear the **View Dashboards** check box, the **Share Dashboards** check box is cleared by default. If you select the **Share Dashboards** check box, the **View Dashboards** check box is selected by default.

All dashboards shared before the permissions were disabled are still available to the users with whom they were shared.

You can share one dashboard at a time. When you share a dashboard with another user, organization, or group, the **Shared by You** icon appears next to the dashboard name. Hover over the icon to see a tooltip displaying the sharing notification.

When a dashboard is shared with you by another user, you can be informed about it by email. Also, a notification appears with a link to the shared dashboard.

If multiple dashboards are shared with you since your last session, the corresponding notification appears at the top of the **Dashboard** tab.

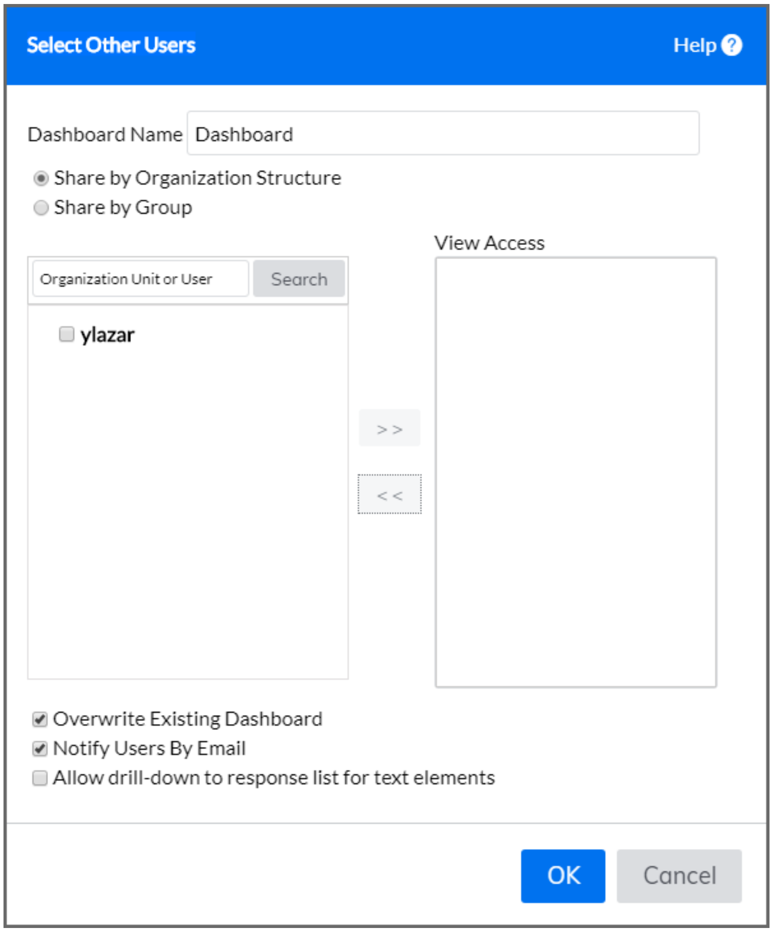
The dashboard viewer can change only the date filter on the shared dashboard to view the information for a specific time period.

The list of users and organizations in the left box of the **Select Other Users** dialog box contains maximum 200 user names. To search for specific user or organization, use the search box at the top of the list.

Share dashboard

Procedure

1. Go to the **Dashboards** tab, click the needed dashboard, and then click the **Share** icon .
2. In the **Select Other Users** dialog box, in the **Dashboard Name** text box, edit the name of the dashboard that you want to share. By default, the text box contains the current dashboard's name.
3. Select one of the following:
   - **Share by Organization Structure** – Share with specific organizations and users. This option is selected by default.
   - **Share by Group** – Share with specific groups configured for Feedback Intelligence. If the dashboard is already shared, the new sharing overwrites the existing one.



The Select Other Users dialog box

To select the **Share by Group** option, verify that a System Administrator configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features** to activate the **Groups** view.

4 In the left column, select a check box next to the needed user, organization, or group, and then click the right double arrows button to move them to the **View Access** box.
To move them back, click the left arrows button.

All users assigned to the selected organization and its child organizations are moved to the right box as well.

5 If needed, clear the following check boxes (they are selected by default):

- **Overwrite Existing Dashboard** – Share one dashboard several times as different dashboards.
- **Notify Users by Email** – Send an email notification to the users allowed to view the dashboard.
- **Allow drill-down to response list for text elements** – Allow respondents to click the text analytics elements on a dashboard and view responses that represent them.

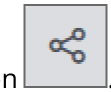
6 Click **OK**.

7 If the **Notify Users by Email** check box is selected, the **Notify User** dialog box opens, where you can edit your email notification.

8 Click **OK**.

Stop the dashboard sharing

Procedure

1 Go to the **Dashboards** tab, click the needed dashboard, and then click the **Share** icon .

2 In the **Select Other Users** dialog box, in the **View Access** text box, select the user or organization that you want to stop sharing the dashboard with.

3 Click the left double arrows button to move the selected user to the **Users** text box.

4 Click **OK**.
The dashboard is no longer available for viewing by the user or organization.

Duplicate a dashboard

Navigation

Dashboards tab > **Dashboard View** tab > menu.

Use the **Duplicate** option to copy the current dashboard.

Only dashboard owner can duplicate the dashboard. If the dashboard is shared with you, the **Duplicate** option is not available and you cannot duplicate the dashboard. By default, the duplicated dashboard is not shared with other users. The filters and theme of the selected dashboard are also applied to the duplicated dashboard.

Duplicate a dashboard

Procedure

1. Click the menu, and then click the **Duplicate** option.
2. In the **Duplicate Dashboard** dialog box, edit the dashboard name, and then click **OK**.

Managing multiple dashboards

Navigation

Dashboards tab > **Dashboard View** tab.

You can add multiple dashboards for different purposes to your home page and switch between them. A new dashboard is added to the right of the currently selected dashboard within the tab structure.

You can add as many dashboards as you want to the home page. Switch between the tabs to view different dashboards. When the home page contains more dashboards than your current window can fit, the scroll arrows appear on the toolbar. You can navigate through the dashboards using the scroll arrows. Next to the last dashboard in the row, the scroll arrow is inactive and appears in gray.

The multiple dashboards toolbar with scroll arrows

Add a new dashboard

This option is only available for the home page containing multiple dashboards.

Procedure

1 Click the black plus icon on the toolbar of the home page. The **Name Your Dashboard** dialog box opens.

2 Edit the name of the dashboard in the **Dashboard Name** field.

3 Click **OK**. The initial entry message appears.

The initial entry message appears only for the newly created and empty dashboards.

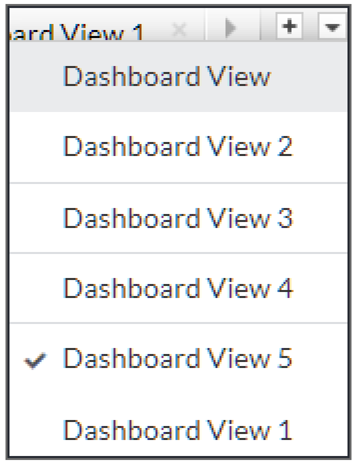
4 Click **Close**.

Switch between the dashboards

This option is only available for the home page containing multiple dashboards.

Procedure

1 Click the black down arrow on the toolbar of the home page. The drop-down list of all existing dashboards appears. The current dashboard is outlined in an orange rectangle and marked with a green check mark.



The dashboards list

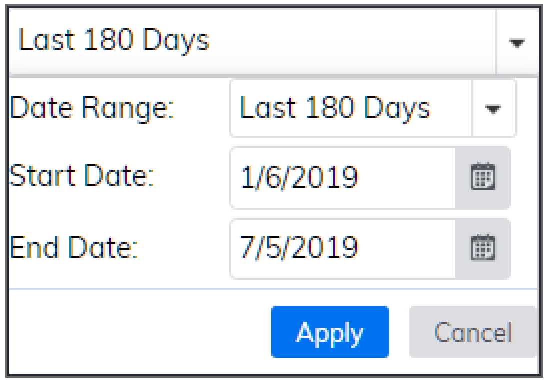
2 Select the dashboard from the drop-down list to open it.

Dashboard date filter

Navigation

Dashboards tab  > **Dashboard View** tab > upper-right corner of the dashboard.

You can filter the dashboard to view the information for a specific time period using the date filter menu.



The date filter menu on a dashboard

When you use a filter like Last Week, Last Month, Last Quarter, etc., the filter is a rolling filter. It means that the filter will continue to update relative to the current date and not the date when it is created.

You can find the following functionality in the dashboard date filter drop-down menu:

- **Date Range** – From the drop-down list, define a date range to filter the information within the dashboard. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.

- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days and is selected by default.

- **Start Date** – Enter the start date in the text box manually or by using the calendar icon.
- **End Date** – Enter the end date in the text box manually or by using the calendar icon.
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

The selected dashboard date filter is applied to all the dashboard items and is saved across the browser sessions. When you re-open the dashboard, the previously saved date filter is selected. The filters are supported separately for each dashboard.

The dashboard date filter does not override the filters previously applied to the dashboard item at the report or report element level. In this case, the dashboard date filter restricts the previously applied filter. It is applied in addition to any other filter. For example, the element date filter is set to the range from 1/1/2011 to 12/31/2011. The dashboard date filter is set to the range from 10/1/2011 to 12/31/2011. The combined filter only shows the data between the date range 1 and date range 2. Thus, the data for the 10/1/2011-12/31/2011 period displays.

Apply a custom Date filter to the dashboard

Procedure

1. Click the date filter menu in the upper-right corner on the dashboard.
2. Select **Custom** from the **Date Range** list.
3. Select the date range using the **Start Date** and **End Date** text boxes.

> These fields are filled in automatically for all the other date filters.

4. Click **Apply** to save the selected changes. The date filter displays in the upper-right corner on the dashboard. The dashboard items are updated to show the data according to the defined filter.

Customize dashboard

Navigation

Dashboards tab .

You can customize the dashboard by editing its name and selecting a theme to make the dashboard elements from different sources look similar.

To edit the dashboard name, hover over the dashboard name, click , and then edit the name.
By default, no theme is applied to the dashboard. The dashboard elements are added to the dashboard with their source theme. When you apply a dashboard theme to the elements, it overrides the elements source theme. If you apply the **None** theme, the dashboard elements original theme is not restored.

Procedure

1 Click the menu, and then click **Change Theme**.
2 In the **Change Theme** box, select the dashboard theme from the **Theme** list, and then click **Save**.

Themes are not supported for the Feedback Intelligence dashboard elements.

Managing a public dashboard

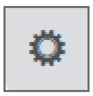
Navigation

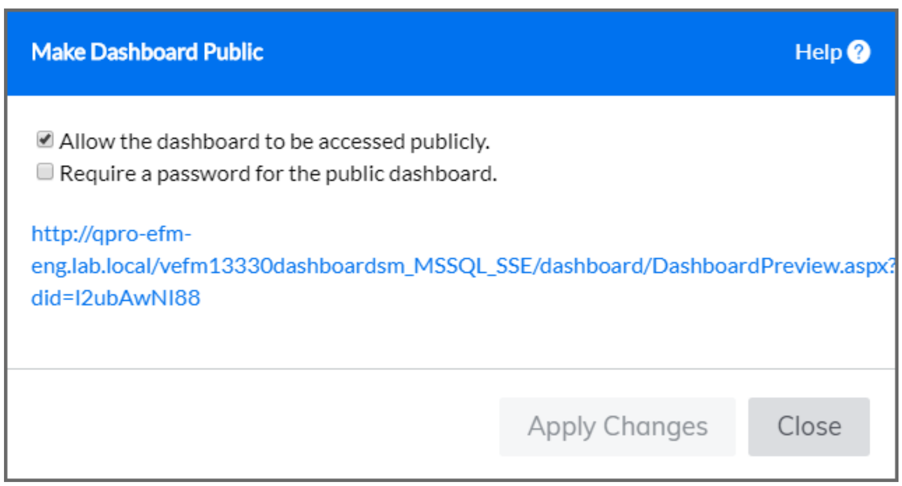
Dashboards page > click the needed dashboard > menu > **Make Dashboard Public** option.

If you want to share your dashboards with other users who do not have access to EFM, you can generate the dashboard public link. In addition, you can secure the public dashboard by password.

Generate a dashboard public link

Procedure

1. Go to the **Dashboards** tab, and then click the needed dashboard.
2. On the  menu, click the **Make Dashboard Public** option.
3. In the **Make Dashboard Public** dialog box, select the **Allow the dashboard to be accessed publicly** check box.
4. To set the password for accessing your public dashboard, select the **Require a password for the public dashboard** check box, and then type the password in the box.
5. To generate the link to your public dashboard, click **Apply Changes**.



The generated link for public dashboard

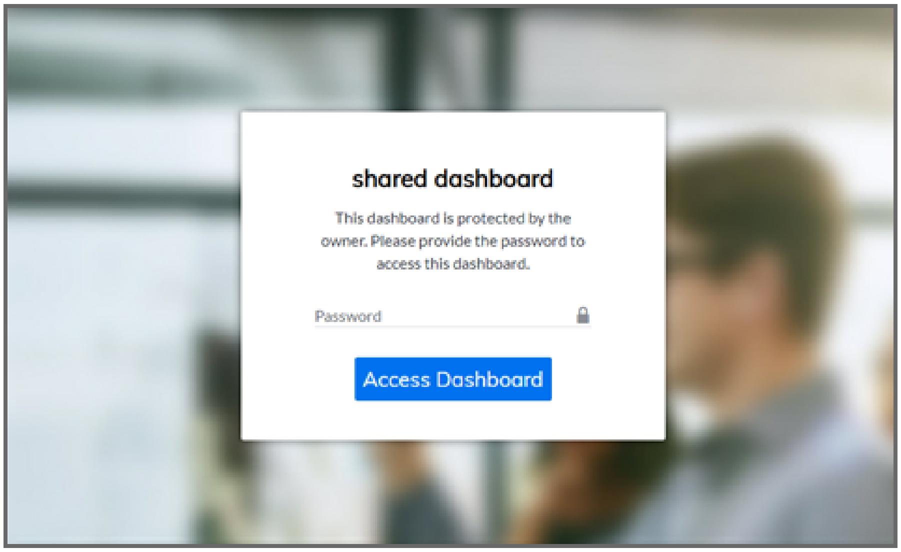
6. Click **Close**.

To stop dashboard public sharing, clear the **Allow the dashboard to be accessed publicly** check box. The dashboard is no longer available for viewing by a dashboard public link.

View a password protected public dashboard

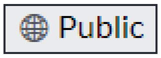
Procedure

1. Open the email that contains the dashboard public link and password.
2. Click the generated dashboard public link.
3. On the dashboard access page, in the **Password** box, type the password for a public dashboard.



The password protected public dashboard

4. Click **Access Dashboard**.

When a dashboard is shared publicly, you can view the **Public** icon 

next to the dashboard name.

Enable a public dashboard for a workgroup

Procedure

1. Go to the **Configuration** tab > **General** tab.
2. On the **General Setup** page, select the **Enable Public Dashboard** check box.
3. Click **Save Setup**.

> For the steps on how to enable public dashboards based on the user role, see the Public dashboard–Role-based access, page 86 topic.

You can select a different source when you add a report element to your dashboard. To make a publicly shared dashboard with report elements accessible for users, you have to add report elements from the projects of which you are the owner. For example, when you are the owner of the survey and add two report elements to a dashboard, one using data from the owned survey and another one on data from the non-owned survey, and then share this dashboard publicly, only one report element is available for the users.

External elements are not supported in the publicly shared dashboards.
If you add an external element to a publicly shared dashboard, you stop sharing this dashboard.

Public dashboard–Role-based access

Navigation

Administration tab > **Roles** tab.

As administrator you can enable public dashboards for a user by creating a new role or editing the existing ones. You can control the workgroup members' access to public dashboards creation and sharing based on the user role set of permissions.

For details on making a dashboard public, see the Managing a public dashboard, page 83.

Activate public dashboard for a user role

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. To grant a user role permission to share dashboards publicly, click the **Create Role** button or the name of already existing role that you want to edit.
3. On the **Edit Role** page, in the **Experience** section, select the **Public Dashboard** check box.
4. Click **Save**.

By selecting the **Public Dashboard** permission, the **View Dashboards** check box is selected automatically.
If the **View Dashboards** check box is not selected, the **Public Dashboard** check box is cleared automatically.

By default, the following user roles have the **Public Dashboard** permission:

- Group Administrator
- Survey Administrator
- Survey Author
- Lite Survey Author
- Report Author

For details on the user roles, see Roles, page 1378 and Create a new role, page 1380.

Dashboard Add Report Element

Navigation

Dashboards page.

You can add all available report elements to the dashboard. You can select report elements from any existing report you are granted access to. Use the **Add Report Element** button in the bottom section for adding report elements to the dashboard.

When you click the **Add Report Element** button, the element selection dialog box opens showing the last modified report on the last viewed survey. You can preview the reports in the dialog box to find the elements that you want to add to the dashboard.

The following options show in the element selection dialog box:

- **Source** – Click this button to select the source of the element that you want to add to the dashboard. Surveys, reports, profiles, data sets, application statistics, file imports, Speech Analytics projects, and comments are all items which contain usable information. The selected source shows to the right of the **Source** button.
- **Report** – Click this drop-down list to view all existing reports available in the selected source. Select the report containing the report element that you want to add to the dashboard.
- **Page** – Click this drop-down list to select the report page containing the report element that you want to add to the dashboard.
- **Select Element** – Click this button to select the report element you want to add to the dashboard.

> For the **Advanced Dashboard**, only the survey that was selected when creating the dashboard is shown.

Add a Report Element to the Dashboard

Procedure

1. Click **Add Report Element** at the bottom of the dashboard. In the **Add a Report Element** dialog box, click **Source** to open the element source selection dialog box, which shows the folders with the existing surveys, comments, profiles, data sets, file imports, Speech Analytics projects, application metrics, and reports that you have access to.
2. Click the black right arrow next to the folder that you need to expand, and then select the element source.
3. Click **Select**.
4. In the **Report** list, click the report name, and then click the report page containing the report element that you want to add.
5. Click **Select Element** next to the report element that you want to add to the dashboard. You can select multiple elements to add to the dashboard at a time. Navigate through the report pages using the navigation arrows to find all report elements that you need. The numeric counter on the **Add** button shows the number of the selected elements.
6. Click **Add**. The selected report elements show on the dashboard.

Adding report elements to dashboard

Navigation

Dashboards tab.

You can add all available report elements to the dashboard, including the report elements from profiles and data sets. You can select report elements from any existing report you are granted access to. Use the **Add Report Element** button in the bottom section for adding report elements to the dashboard.

When you click the **Add Report Element** button, the element selection dialog box opens showing the last modified report on the last viewed survey or data set. You can preview the reports in the dialog box to find the elements that you want to add to the dashboard.

In the element selection dialog box, the following options are available:

- **Source** – Click this button to select the source of the element that you want to add to the dashboard. Surveys, reports, profiles, data sets, application statistics, file imports, Speech Analytics projects, Unified Data Set projects, ForeSee projects, and comments are all items which contain usable information. The selected source shows on the right side of the Source button.
- **Report** – Click the list to view all existing reports available in the selected source. Select the report containing the report element that you want to add to the dashboard.
- **Page** – Click the list to select the report page containing the report element that you want to add to the dashboard.
- **Select Element** – Click this button to select the report element you want to add to the dashboard.

Add a report element to the dashboard

1. Click **Add Report Element** at the bottom of the dashboard. In the **Add a report element** dialog box, click **Source** to open the element source selection dialog box, which shows the folders with the existing surveys, comments, profiles, data sets, file imports, Speech Analytics projects, ForeSee projects, comments, application metrics, and reports that you have access to.

> For the **Advanced Dashboard**, only the survey that was selected when creating the dashboard is shown.

2. Click the black right arrow next to the folder you need to expand, and then select the element source.
3. Click **Select**.
4. In the **Report** list, click the report name, and then click the report page containing the report element that you want to add.
5. Click **Select Element** next to the report element that you want to add to the dashboard. You can select multiple elements to add to the dashboard at a time. Navigate through the report pages using the navigation arrows to find all report elements that you need. The numeric counter on the Add button shows the number of the selected elements.
6. Click **Add**.
   The selected report elements are shown on the dashboard.

Adding Elements to Dashboard from Report

Navigation

Dashboards tab.

You can add report elements to the dashboard from the report designer using the **Add to Dashboard** icon  in the right pane. The report element is added to the bottom section of the selected dashboard. You can select whether to add a report element to an existing dashboard or to create a new dashboard and add the element to it. After adding the element, you stay on the current report and can add more elements. The newly created dashboard becomes available in the list of existing dashboards.

Add a Report Element to a new dashboard

Procedure

1. In the report designer, hover over the report element that you want to add to a dashboard. The **Add to Dashboard** icon appears in the right pane.
2. Click the **Add to Dashboard** icon.
   The **Add report element to dashboard** dialog box opens.
3. Select **Create New Dashboard** in the **Select Dashboard** list.
   The **Dashboard Name** text box appears.
4. Enter the name for the new dashboard in the **Dashboard Name** field.
5. Click **OK**.
   The new dashboard with the report element is added to the right of the last viewed dashboard on the home page.

Add a Report Element to an existing dashboard

Procedure

1. In the report designer, hover over the report element that you want to add to a dashboard. The **Add to Dashboard** icon appears in the right pane.
2. Click the **Add to Dashboard** icon.
   The **Add report element to dashboard** dialog box opens.
3. Select the dashboard for adding the report element from the **Select Dashboard** list.
4. Click **OK**.
   The report element is added to the bottom section of the selected dashboard.

To delete the report element from the dashboard, go to the dashboard.

Dashboard Styling of Report Elements

Navigation

Dashboards tab.

You can add all report element types to the dashboard to provide a real-time view of critical information from your report within a dashboard. A dashboard item created from a report item is a snapshot (copy) of its settings and view. The data within the report element displays according to the dashboard date filter.

The report elements on the dashboard can have different appearance depending on the type. The question caption appears in the tooltip. The question title appears in the dashboard element title bar. The dashboard theme is applied to the element automatically.

> For the steps on how to add report elements to the dashboard, see Adding Elements to Dashboard from Report, page 90.

Chart Elements

When you add a report element to the dashboard, the text on the chart, for example, question text, resizes appropriately for better appearance. The default width of the "Frequency Chart," "Trend Chart," and "Sentiment Chart" report elements is set to 33%. When you resize the browser window, the charts fit the current window size automatically.

For better appearance, the number of categories for the "Sentiment Chart" report element on the dashboard is limited to 5 per page. By default, all categories are horizontal. The settings applied to the "Sentiment Chart" report element in the report designer will be overridden.

Table Elements

If the table-based element contains a large amount of data, the scroll bars appear within the element on the dashboard. The default width of the table-based elements is the following:

- Statistics – 33%
- Sentiment Table and Sentiment Trend Table – 50%
- Frequency Table, Correlation, Gap, and Response List – 66%
- Top Box, Top Box Cross-tab, Trend Table, Summary Table, and Summary of Means – 100% and is not resizable.
- Cross-tab, Bar Chart Organization Cross-tab, Top Box Organization Cross-tab, and Organization Cross-tab Table – 100%.

Text-Based Elements

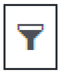
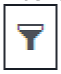
The default width of the "Sentiment Summary," "Word Cloud," and "Heat Map" text analytics report elements is set to 50%. When you resize the browser window, the elements fit the current window size automatically.

For the text analytics report elements, you can click the element and view responses that represent it.

Displaying Report Filters on the Dashboard

Navigation

Dashboards tab.

You can see the notification on the dashboard element that the filter is applied to its source. In such case, the Filtered icon  appears in the upper-left corner of the dashboard element. Hover over the Filtered icon  to view the applied filter in a tooltip.

The filter on the dashboard element does not change even if you change its source filter in the report.

Add Workgroup Metrics to Dashboard

Navigation

Dashboards tab.

You can add application metrics to the dashboard to display the important information, such as workgroup, panel, survey, and user statistics directly within the dashboard. You can also define the scope of the presented data and view the data from the specific survey, report, or application statistics. Use the **Add Application Metric** button in the bottom section for adding application metrics to the dashboard.

When you click the **Add Application Metric** button, the element selection dialog box opens. You can preview the metrics in the dialog box to find the items that you want to add to the dashboard.

The following options are available in the element selection dialog box:

- **Source** – Click this button to select the source of the element that you want to add to the dashboard. Surveys, reports, profiles, data sets, application statistics, file imports, Speech Analytics projects, Unified Data Set projects, ForeSee projects, and comments are all items which contain usable information. The selected source is displayed on the right side of the **Source** button.

> For the **Advanced Dashboard**, only the questions from the survey that was selected when creating the dashboard are shown.

- **Select Element** – Click this button to select the element you want to add to the dashboard.

Add an Application Metric to the Dashboard

Procedure

1. Click the **Add Application Metric** button on the home page. The element selection dialog box opens.
2. Click the **Source** button. The element source selection dialog box opens showing the folders with the existing surveys, comments, profiles, data sets, file imports, Speech Analytics projects, Unified Data Set projects, ForeSee projects, application metrics, and reports that you have access to.
3. Click the black right arrow next to the folder you need to expand and select the element source.
4. Click **Select**.
5. Click the **Select Element** button next to the metric that you want to add to the dashboard. You can select multiple metrics to add to the dashboard at a time. The numeric counter on the **Add** button shows the number of the selected metrics.
6. Click **Add**. The selected metrics appear on the dashboard.

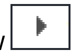
Filter the Workgroup Statistics Metric Data

Procedure

After adding the metric to the dashboard, you can select all surveys or one specific survey, for which to display the metric. By default, all surveys are included in the calculation. If the user does not have the

View All Surveys permission, only surveys that the user has access to are included in the calculation, and the most recently accessed survey is the default filter.

1 Click the link next to the **Showing data for** option to select the metric source. The metric source selection dialog box opens.

2 Click the black right arrow  next to the folder you need to expand and select the metric source.

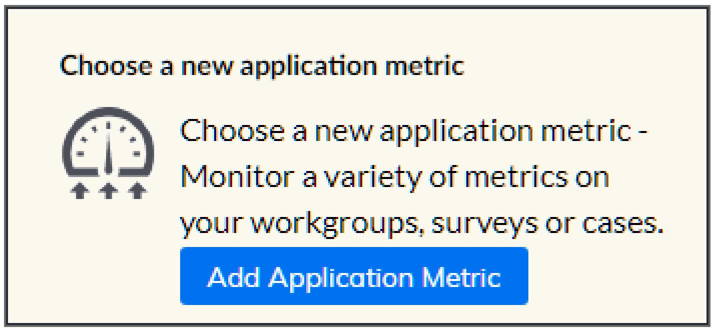
3 Click **Select**. The current filter shows on the right side of the **Showing data for** option on the dashboard.

Adding application metrics to dashboard

Navigation

Dashboards tab > **Add Application Metric** button.

You can add application metrics to the dashboard to display the important information, such as workgroup, panel, survey, data set, and user statistics directly within the dashboard. You can also define the scope of the presented data and view the data from the specific survey, report, data set, or application statistics. Use the **Add Application Metric** button in the bottom section for adding application metrics to the dashboard.



The Add Application Metric button

When you click the **Add Application Metric** button, the element selection dialog box opens. You can preview the metrics in the dialog box to find the items that you want to add to the dashboard.

The following options are available in the element selection dialog box:

- **Source** – Click this button to select the source of the element that you want to add to the dashboard. Surveys, reports, profiles, data sets, application statistics, file imports, Speech Analytics projects, Unified Data Set projects, ForeSee projects, and comments are all items which contain usable information. The selected source is displayed on the right side of the **Source** button.

> For the **Advanced Dashboard**, only the questions from the survey that was selected when creating the dashboard are shown.

- **Select Element** – Click this button to select the element you want to add to the dashboard.

Add an application metric to the dashboard

Procedure

1 Click the **Add Application Metric** button on the home page. The element selection dialog box opens.

2 Click the **Source** button. The element source selection dialog box opens showing the folders with the existing surveys, comments, profiles, data sets, file imports, Speech Analytics projects, Unified Data Set projects, ForeSee projects, application metrics, and reports that you have access to.

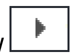
3 Click the black right arrow next to the folder you need to expand and select the element source.

4. Click **Select**.
5. Click the **Select Element** button next to the metric that you want to add to the dashboard. You can select multiple metrics to add to the dashboard at a time. The numeric counter on the **Add** button shows the number of the selected metrics.
6. Click **Add**. The selected metrics appear on the dashboard.

Filter the workgroup statistics metric data

After adding the metric to the dashboard, you can select all surveys or one specific survey, for which to display the metric. By default, all surveys are included in the calculation. If the user does not have the **View All Surveys** permission, only surveys that the user has access to are included in the calculation, and the most recently accessed survey is the default filter.

Procedure

1. Click the link next to the **Showing data for** option to select the metric source. The metric source selection dialog box opens.
2. Click the black right arrow  next to the folder you need to expand and select the metric source.
3. Click **Select**. The metric source is selected. The current filter shows on the right side of the **Showing data for** option on the dashboard.

Adding Workgroup Statistics to the Dashboard

Navigation

Dashboards tab > **Add Application Metric** button.

You can add workgroup statistics such as workgroup campaign status, current response count and rate, and current health score of the panel directly to the dashboard. Additionally, you can add items from other application or Web page to the dashboard by using the embedded code or URL. Use the **Add Application Metric** button in the bottom section to add workgroup metrics to the dashboard.

Response Activity

Navigation

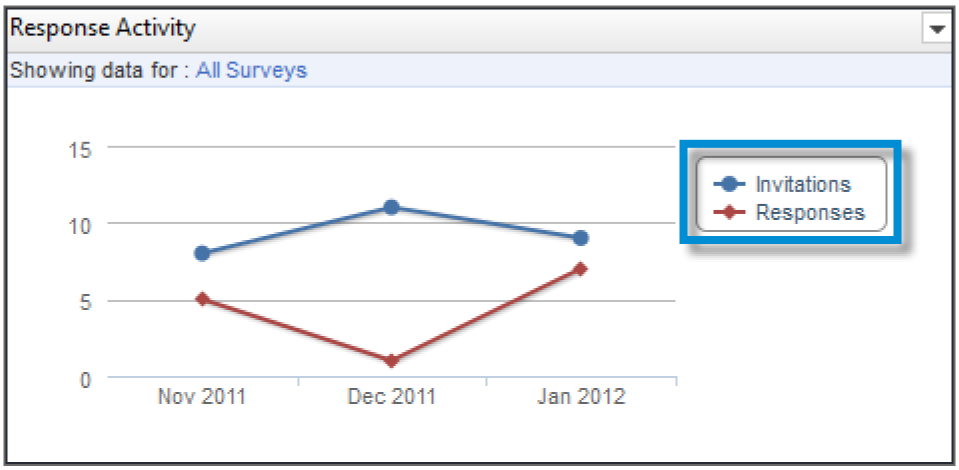
Dashboards tab > **Add Application Metric** button > **Response Activity** metric.

You can add the **Response Activity** metric to the dashboard to view the number of people invited versus started a survey. This functionality is available for the email-based surveys only. The **Generate Link** surveys are not included.

The following charts are displayed in the **Response Activity** metric:

- **Invitations** – Shows the count of invitations sent to participants to take the survey.
- **Responses** – Shows the count of respondents who replied to the survey.

Click the label on the legend to show or hide the corresponding displayed value.



The legend on the response rate chat

The data displayed in the **Response Activity** is calculated depending on the current dashboard date filter. The **Response Activity** is calculated only for the surveys that have the **Open** and **Closed** status.

You can define the scope of the presented data and view the data from the specific survey. The current filter shows to the right of the **Showing data for** option. By default, all surveys are included in the calculation. If the user does not have the **View All Surveys** permission, only surveys that the user has access to are included in the calculation, and the most recently accessed survey is the default filter.

The default size of the **Response Activity** metric is set to 33%.

For details on how to add response metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Respondents by Invitation

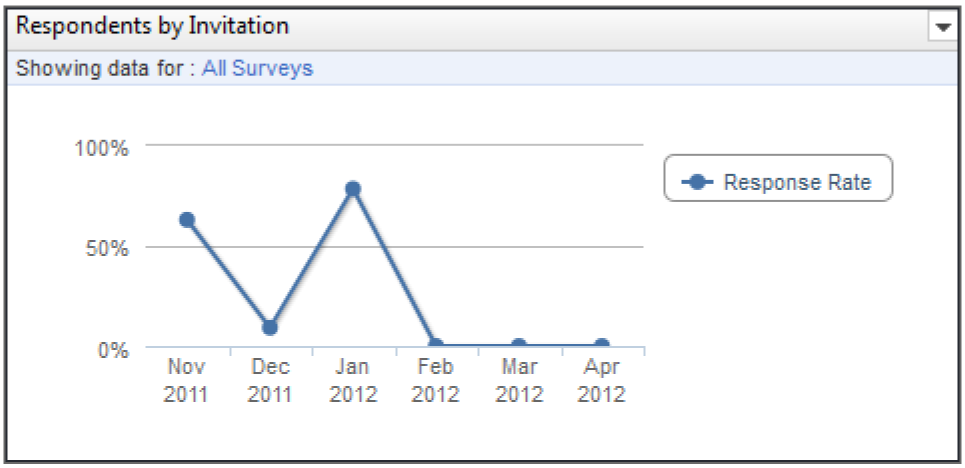
Navigation

Dashboards tab > **Add Application Metric** button > **Respondents of Invitation** metric.

You can add the **Respondents by Invitation** metric to the dashboard to view the current workgroup response rate. This functionality is available for all the email-based surveys only. The **Generate Link** surveys are not included.

The **Respondents by Invitation** metric appears as trend chart and displays the response rate within the specific date range. The response rate is the percentage of invitations sent versus the percentage of responses given. The response rate is calculated in the following way:

Responses / Invitations * 100% = X, that appears when you hover over the chart.



The legend on the respondents by invitation chart

The data displayed in the **Respondents by Invitation** chart is calculated depending on the current dashboard date filter. The response rate is calculated only for the surveys that have the **Open** and **Closed** status.

You can define the scope of the presented data and view the data from the specific survey. The current filter shows to the right of the **Showing data for** option. By default, all surveys are included in the calculation. If the user does not have the **View All Surveys** permission, only surveys that the user has access to are included in the calculation, and the most recently accessed survey is the default filter.

The default size of the **Respondents by Invitation** metric is set to 33%.

For details on how to add the **Respondents by Invitation** metric to the dashboard, seeAdd Workgroup Metrics to Dashboard, page 94.

Workgroup Campaign Status

Navigation

Dashboards tab > add the campaign status chart to the dashboard.

You can add a chart of your workgroup campaign status for all surveys to the dashboard. The workgroup campaign status displays as a pie chart on the dashboard. Hover over the survey status on the chart to view the count and percentage of participants that represent it.

The campaign status is calculated only for the surveys that are in the Open or Closed status. The workgroup campaign status chart is displayed in the same manner as the overall campaign chart on the **Collect** tab and shows the following participant statuses:

- Sent (or In Queue)
- Confirmed Received
- Started
- Undeliverable
- Completed
- Bounced Back
- Unsubscribed
- Branched Out
- Over Quota

For definitions of the statuses, see Participant status, page 584.

The workgroup campaign status is calculated depending on the current dashboard date filter. You can define the scope of the presented data and view the data from the specific survey. The current filter shows to the right of the **Showing data for** option. By default, all surveys are included in the calculation. If the user does not have the **View All Surveys** permission, only surveys that the user has access to are included in the calculation, and the most recently accessed survey is the default filter.

The default size of the campaign status metric is set to 33%.

For details on how to add campaign status to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Panel Health Score Gauge

Navigation

Dashboards tab > add the current panel health score to the dashboard.

You can add the workgroup panel health score indicating the current health of the panel to the dashboard. The workgroup panel health score is presented as a gauge, showing the average panel health score in the same manner as on the Panel tab.

Panel Health Score is not available for the **Advanced Dashboard**.

Only users who have access to view the panelists have permissions to view the panel health score on the dashboard.

The health score is a weighted value on a 0% to 100% scale showing the average activity rate of the panelists. The gauge presents the health score for the panelists of the workgroup in the following way:

- Blue – healthy, 75% and above
- Red – unhealthy, 25% and below
- Grey – all other percentages.

For details on the panel health score, see Panel Health Score, page 1241.

The dashboard date filter does not affect the panel health score. The width of the health score element is set to 33% and is not resizable.

How to add the Panel Health Score to a dashboard

Procedure

1. Click the **Add Application Metric** button on the home page. The element selection dialog box opens.
2. Click the **Select Element** button next to the current panel health score element.
3. Click **Add**. The panel health score gauge appears on the dashboard.

External Content Dashboard Item

Navigation

Dashboards tab > **Add Application Metric** button > **Workgroup Statistics** source > **External Content** item > **Add** button > **External Content** item.

You can add items from other application or web page to the dashboard using the embed code or URL.

Use the **Add Application Metric** button to add the external content to the dashboard. The default width of the external content dashboard item is set to 33%, but you can resize it to optimize the displayed content within the dashboard. For the videos, you can use the iFrame to ensure that the video fits correctly.

<iframe width="560" height="315" src="http://www.examplevideolink" frameborder="0" allowfullscreen></iframe>

You can access the basic web page functionality directly within the dashboard item. You can also change the content using the dashboard item menu.

Add External Content to the Dashboard

Procedure

1. Copy the embed code or URL of the web page that you want to add to the dashboard.
2. Click the **Add Application Metric** button on the Dashboards page. The element selection dialog box opens.
3. Into the text box, enter the copied embed code or URL of the web page that should appear on the dashboard.
4. Click the **Select Element** button above the text box.
5. Click **Add**. The external content item appears on the dashboard.

Edit an External Content Dashboard Item

Procedure

1. Click the black down arrow  in the upper-right corner of the external content dashboard item that you want to edit.
2. In the drop-down menu, select the **Edit** option. The external content editing dialog box opens. See images below.
3. Into the text box, enter the copied embed code or URL of the Web page that should appear on the dashboard.
4. Click **OK**. The external content dashboard item updates immediately.

Add case metrics to the dashboard

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source.

You can add case metrics to the dashboard to monitor the case statistics directly within the dashboard. The following elements are available to view the case trending properties: **Cases Opened vs. Cases Closed**, **Average Time Open (Days)**, **Average Resolution Time (Days), Trending Properties Heat Map**, **Trending Properties Cloud**, or **Case Summary Pareto Chart** element.

The case metrics are available only if you have a license for the **Case Management** feature.

The Cases Opened vs. Cases Closed Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Cases Opened vs. Cases Closed** metric > **Add** button.

You can add the **Cases Opened vs. Cases Closed** metric to the dashboard by using the **Add Application Metric** button. Thus you can view the number of opened versus closed cases within the dashboard.

The following charts are displayed for the **Cases Opened vs. Cases Closed** metric:

- **Opened** – The number of opened cases in a column chart.
- **Closed** – The number of closed cases in a line chart.

You can click the label on the legend to show or hide the corresponding displayed value. The data displayed in the **Cases Opened vs. Cases Closed** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Report Element** dialog box. By default, all users are included in the calculation.

When the **Cases Opened vs. Cases Closed** metric is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs. For details on how to add case metrics to the dashboard, see Add case metrics to the dashboard, page 104.

Procedure

1 Add a **Cases Opened vs. Cases Closed** metric to the dashboard.

2 Click the arrow in the upper-right corner of the case metric.

3 In the drop-down menu, click **Edit**.

4 In the **Edit Report Element** dialog box, in the **Data Filter** section, define the scope of the data presented in the chart by selecting the corresponding radio button. The following options are available:

- **Show Only Me** - Only cases managed by you will be displayed in the chart.
- **Show Logged in User** - Only cases opened by a logged in user will be displayed in the chart. When you share a dashboard with other users, they can see data for their own cases only.
- **Show All Users** - Cases managed by all case users will be displayed in the chart. This is the default option.
- **Choose Specific Users to Display** - Only data of the cases managed by specific users will be displayed in the chart. You can define the users below in the dialog.

In the **Find User** text box, type the name of the user, whose case data you want to view in the chart. The search results are displayed in the **Available Users** box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5 In the **Find User** text box, type the name of the user, whose case data you want to view in the chart. The search results are displayed in the **Available Users** box.

The **Find User**, **Available Users**, and **Selected Users** boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6 In the **Available Users** box, select the user. Only users who have any case assigned to them appear in the box. When there are more than 50 users, the **Available Users** box appears as an autocompleting text box.

To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7 Click the right double arrows button to move the selected user to the **Selected Users** box.

8 In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:

- **Date Range** – From the drop-down list, define a date range to filter the information within the **Cases Opened vs. Cases Closed** metric. The following options are available:
- **None** – Applies no date filter.
- **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the data for today.
- **Current Month** – Shows the data for the current month, no matter the current date.
- **Current Quarter** – Shows the data for the current three months, no matter the current date.
- **Current Year** – Shows the data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the data for the past week.
- **Last Month** – Shows the data for the past month.
- **Last Quarter** – Shows the data for the past three months.
- **Last Year** – Shows the data for the past year.
- **Last 30 Days** – Shows the data for the past 30 days.
- **Last 90 Days** – Shows the data for the past 90 days.
- **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

9 Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

The Average Time Open Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Average Time Open** metric > **Add** button.

You can add the **Average Time Open** metric to the dashboard by using the **Add Application Metric** button. Thus you can view the average open time of cases opened within a workgroup.

The following charts are displayed for the **Average Time Open** metric:

- **Average Time Open for Users** – The average open time for the cases created by a single user. The individual column appears for each user.
- **Average Time Open for Workgroup** – The average open time of cases opened within a workgroup. This metric appears as a straight horizontal line and is displayed only when the **Show Average Time Open for Workgroup** check box is selected in the **Edit Dashboard Element** dialog box.

The **Average Time Open** calculation includes cases with the Open and On Hold current status.

The data displayed in the **Average Time Open** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Dashboard Element** dialog box. By default, all case users are included in the calculation.

When the **Average Time Open** metric is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs.

For details on how to add case metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Procedure

1. Add an **Average Time Open** metric to the dashboard.
2. Click the arrow in the upper-right corner of the case metric.
3. In the drop-down menu, click **Edit**.
4. In the **Edit Dashboard Element** dialog box, in the **Data Filter** section, define the scope of the data presented on the chart by selecting the corresponding radio button. The following options are available:
   - **Show Only Me** – Only cases opened by you will be displayed in the chart.
   - **Show Logged in User** – Only cases opened by a logged in user will be displayed in the chart. When you share a dashboard with other users, they can see data for their own cases only.
   - **Show All Users** – Cases opened by all case users will be displayed in the chart. This is the default option.
   - **Choose Specific Users to Display** – Only data of the cases opened by specific users will be displayed in the chart. You can also select the **Unassigned** option to easily manage the unassigned cases. You can define the users below in the dialog box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5. In the **Find User** text box, type the name of the user whose case data you want to view in the chart. The search results are displayed in the **Available Users** box.

> The **Find User**, **Available Users**, and **Selected Users** boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6. In the **Available Users** box, select the user. Only users who have any case assigned to them appear in the box. When there are more than 50 users, the **Available Users** box appears as an autocompleting text box.

> To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7. Click the right double arrows button to move the selected user to the **Selected Users** box.
8. In the **Data** section, select the **Show Average Time Open for Workgroup** check box to display the average open time calculation for the whole workgroup within the chart. This option is active by default.
9. In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:
   - **Date Range** – From the drop-down list, define a date range to filter the information within the **Average Time Open** metric. The following options are available:
   - **None** – Applies no date filter.
   - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
   - **Today** – Shows the data for today.
   - **Current Month** – Shows the data for the current month, no matter the current date.
   - **Current Quarter** – Shows the data for the current three months, no matter the current date.
   - **Current Year** – Shows the data for the current calendar year, no matter the current date.
   - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
   - **Last Week** – Shows the data for the past week.
   - **Last Month** – Shows the data for the past month.
   - **Last Quarter** – Shows the data for the past three months.
   - **Last Year** – Shows the data for the past year.
   - **Last 30 Days** – Shows the data for the past 30 days.
   - **Last 90 Days** – Shows the data for the past 90 days.
   - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
   - **Start Date** – Enter the start date in the text box manually or by using the calendar icon .

- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.

10 **Cancel** – Remove the changes.Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

The Average Resolution Time (Days) Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Average Resolution Time (Days)** metric > **Add** button.

You can add the **Average Resolution Time (Days)** metric to the dashboard by using the **Add Application Metric** button. Thus you can view the average open time of the currently closed cases within a workgroup.

The following charts are displayed for the **Average Resolution Time (Days)** metric:

- **Average Resolution Time for Users** – The average open time in a column chart for the cases created by a single user and currently closed. The individual column appears for each user.
- **Average Resolution Time for Workgroup** – The average open time in a line chart for the currently closed cases within a workgroup. This metric appears as a straight horizontal line and is displayed only when the **Show Average Resolution Time for Workgroup** check box is selected in the **Edit Dashboard Element** dialog box.

The data displayed in the **Average Resolution Time (Days)** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Dashboard Element** dialog box. By default, all case users are included in the calculation.

When the **Average Resolution Time (Days)** metric is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs. For details on how to add case metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Procedure

1. Add an **Average Resolution Time (Days)** metric to the dashboard.
2. Click the arrow in the upper-right corner of the case metric.
3. In the drop-down menu, click **Edit**.
4. In the **Edit Dashboard Element** dialog box, in the **Data Filter** section, define the scope of the data presented on the chart by selecting the corresponding radio button. The following options are available:
    - **Show Only Me** – Only cases resolved by you will be displayed in the chart.
    - **Show Logged in User** – Only cases opened by a logged in user will be displayed in the chart. When you share a dashboard with other users, they can see data for their own cases only.
    - **Show All Users** – Cases resolved by all case users will be displayed in the chart. This is the default option.
    - **Choose Specific Users to Display** – Only data of the cases opened by specific users will be displayed in the chart. You can also select the **Unassigned** option to easily manage the unassigned cases. You can define the users below in the dialog box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5. In the **Find User** text box, type the name of the user whose case data you want to view in the chart. The search results are displayed in the **Available Users** box.

The **Find User**, **Available Users**, and **Selected Users** boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6 In the **Available Users** box, select the user. Only users who have any case assigned to them appear in the box. When there are more than 50 users in a workgroup, the **Available Users** box appears as an autocompleting text box.

To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7 Click the right double arrows button to move the selected user to the **Selected Users** box.

8 In the **Data** section, select the **Show Average Resolution Time for Workgroup** check box to display the average resolution time calculation for the whole workgroup within the chart. This option is active by default.

9 In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:

- **Date Range** – From the drop-down list, define a date range to filter the information within the **Average Time Open** metric. The following options are available:
- **None** – Applies no date filter.
- **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the data for today.
- **Current Month** – Shows the data for the current month, no matter the current date.
- **Current Quarter** – Shows the data for the current three months, no matter the current date.
- **Current Year** – Shows the data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the data for the past week.
- **Last Month** – Shows the data for the past month.
- **Last Quarter** – Shows the data for the past three months.
- **Last Year** – Shows the data for the past year.
- **Last 30 Days** – Shows the data for the past 30 days.
- **Last 90 Days** – Shows the data for the past 90 days.
- **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

10 Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

The Trending Properties Heat Map Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Trending Properties Heat Map** metric > **Add** button.

You can add the Trending Properties Heat Map metric to the dashboard by using the Add Application Metric button. Thus you can view a graphical representation of case data that appears in different size and color within the dashboard. The size of each heat map segment indicates the number of cases, to which the corresponding property is applied. The color indicates the average priority, highlighting low priorities in green and high priorities in red.

Item	Description
1	The custom property applied to the case.
2	The selected custom property choice.
3	Only custom properties that are currently applied to the cases are displayed in a heat map.

Only custom properties that are currently applied to the cases are displayed in a heat map.

When you hover over the segment, a tooltip appears displaying the following details of the case property:

- **Property > Choice** – The names of the case property and property choice applied to the case.
- **Number of Cases** – The number of cases, to which the corresponding property is applied.
- **Average Priority** – The average priority of the cases, to which the corresponding property is applied.

The data displayed in the **Trending Properties Heat Map** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Report Element** dialog box. By default, all case users are included in the calculation.

When the **Trending Properties Heat Map** metric is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs. For details on how to add case metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Trending Properties Heat Map Custom Filtering

You can apply the data filters to the trending properties heat map to view the data that represents a certain value in the heat map. When you click the value in the **Trending Properties Heat Map** metric, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

Procedure

1. Add a **Trending Properties Heat Map** metric to the dashboard.

2 Click the arrow in the upper-right corner of the case metric.

3 In the drop-down menu, click **Edit**.

4 In the **Edit Report Element** dialog box,in the **Data Filter** section, define the scope of the data presented in the heat map by selecting the corresponding radio button. The following options are available:

- **Show Only Me** – Only cases opened by you will be displayed in the heat map.
- **Show Logged in User** – Only cases opened by a logged in user will be displayed in the chart. When you share a dashboard with other users, they can see data for their own cases only.
- **Show All Users** – Cases opened by all case users will be displayed in the heat map. This is the default option.
- **Choose Specific Users to Display** – Only data of the cases opened by specific users will be displayed in the heat map. You can define the users below in the dialog box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5 In the **Find User** text box, type the name of the user whose case data you want to view in the heat map. The search results are displayed in the **Available Users** box.

> The **Find User**, **Available Users**, and **Selected Users** boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6 In the **Available Users** box, select the user. Only users who have any case assigned to them appear in the box. When there are more than 50 users, the **Available Users** box appears as an autocompleting text box.

> To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7 Click the right double arrows button to move the selected user to the **Selected Users** box.

8 In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:

- **Date Range** – From the drop-down list, define a date range to filter the information within the **Trending Properties Heat Map** metric. The following options are available:
- **None** – Applies no date filter.
- **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the data for today.
- **Current Month** – Shows the data for the current month, no matter the current date.
- **Current Quarter** – Shows the data for the current three months, no matter the current date.
- **Current Year** – Shows the data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the data for the past week.
- **Last Month** – Shows the data for the past month.

- **Last Quarter** – Shows the data for the past three months.
- **Last Year** – Shows the data for the past year.
- **Last 30 Days** – Shows the data for the past 30 days.
- **Last 90 Days** – Shows the data for the past 90 days.
- **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

9 Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

The Trending Properties Cloud Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Trending Properties Cloud** metric > **Add** button.

You can add the **Trending Properties Cloud** metric to the dashboard by using the **Add Application Metric** button. Thus you can view a case properties data that appears in a word cloud on the dashboard. Each word in a cloud indicates a custom property choice applied to one or more cases. The size of the word depends on the number of cases, to which the corresponding property is applied. The color indicates the average priority, highlighting low priorities in green and high priorities in red.

Only custom properties that are currently applied to the cases are displayed in a word cloud.

When you hover over the word, a tooltip appears displaying the following details of the case property:

- **Number of Cases** – The number of cases, to which the corresponding property is applied.
- **Average Priority** – The average priority of the cases, to which the corresponding property is applied.

The data displayed in the **Trending Properties Cloud** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Report Element** dialog box. By default, all case users are included in the calculation.

When the **Trending Properties Cloud** metric is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs.

For details on how to add case metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94.

Trending Properties Cloud Custom Filtering

You can apply the data filters to the trending properties cloud to view the data that represents a certain value in the word cloud. When you click the value in the **Trending Properties Cloud** metric, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

Procedure

1 Add a **Trending Properties Cloud** metric to the dashboard.

2 Click the arrow in the upper-right corner of the case metric.

3 In the drop-down menu, click **Edit**.

4 In the **Edit Report Element** dialog box, in the **Data Filter** section, define the scope of the data presented in the word cloud by selecting the corresponding radio button. The following options are available:

   - **Show Only Me** – Only cases opened by you will be displayed in the word cloud.
   - **Show Logged in User** – Only cases opened by a logged in user will be displayed in the chart. When you share a dashboard with other users, they can see data for their own cases only.

- **Show All Users** – Cases opened by all case users will be displayed in the word cloud. This is the default option.
- **Choose Specific Users to Display** – Only data of the cases opened by specific users will be displayed in the chart. You can also select the **Unassigned** option to easily manage the unassigned cases. You can define the users below in the dialog box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5 In the **Find User** text box, type the name of the user whose case data you want to view in the word cloud. The search results are displayed in the **Available Users** box.

> The **Find User**, **Available Users**, and **Selected Users** boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6 In the **Available Users** box, select the user. Only users who have any case assigned to them appear in the box. When there are more than 50 users, the **Available Users** box appears as an autocompleting text box.

> To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7 Click the right double arrows button to move the selected user to the **Selected Users** box.

8 In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:

- **Date Range** – From the drop-down list, define a date range to filter the information within the **Trending Properties Cloud** metric. The following options are available:
- **None** – Applies no date filter.
- **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the data for today.
- **Current Month** – Shows the data for the current month, no matter the current date.
- **Current Quarter** – Shows the data for the current three months, no matter the current date.
- **Current Year** – Shows the data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the data for the past week.
- **Last Month** – Shows the data for the past month.
- **Last Quarter** – Shows the data for the past three months.
- **Last Year** – Shows the data for the past year.
- **Last 30 Days** – Shows the data for the past 30 days.
- **Last 90 Days** – Shows the data for the past 90 days.
- **Last 180 Days** – Shows the data for the past 180 days and is selected by default.

- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

9 Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

The Case Summary Pareto Chart Metric

Navigation

Dashboards tab > **Add Application Metric** button > **Case Metrics** source > **Case Summary Pareto Chart** metric > **Add** button.

You can add the **Case Summary Pareto Chart** metric to the dashboard by using the **Add Application Metric** button. Thus you can view the case counts by core or custom properties on the dashboard.

The following charts are displayed for the **Case Summary Pareto Chart** metric:

- **Total Cases** – The number of cases according to the option selected from the **Segmented by** list above the chart against the total number of cases. The individual column appears for each option. The **Contact's Business** is the default option. The columns are arranged in a descending order from left to right. The chart may include up to 12 columns.
- **Cumulative Percentage** – The cumulative percentage of cases according to the option selected from the **Segmented by** list above the chart against the total percentage of valid cases. The cumulative percentage shows when you hover over the chart.

> For details on the **Case Summary Pareto Chart** calculation, see Case Summary Pareto Chart, page 1146.

The data displayed in the **Case Summary Pareto Chart** metric is calculated depending on the current dashboard date filter. You can filter the presented case data to include only specific users into the calculation by using the **Edit Dashboard Element** dialog box. By default, all case users are included in the calculation.

When the **Case Summary Pareto Chart** metric is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs.

> For details on how to add case metrics to the dashboard, see Add Workgroup Metrics to Dashboard, page 94

Trending Properties Cloud Custom Filtering

You can apply the data filters to the trending properties cloud to view the data that represents a certain value in the word cloud. When you click the value in the **Case Summary Pareto Chart** metric, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

Filter the Case Summary Pareto Chart Metric Data

1. Add a **Case Summary Pareto Chart** metric to the dashboard.
2. Click the arrow in the upper-right corner of the case metric.
3. In the drop-down menu, click **Edit**. The **Edit Dashboard Element** dialog box opens.
4. In the **Data Filter** section, define the scope of the data presented on the chart by selecting the corresponding radio button. The following options are available:
   - **Show Only Me** – Only cases opened by you will be displayed in the chart.

- **Show Logged in User** - Only cases opened by a logged in user will be displayed on the chart. When you share a dashboard with other users, they can see data for their own cases only.
- **Show All Users** – Cases opened by all case users will be displayed in the chart. This is the default option.
- **Choose Specific Users to Display** – Only data of the cases opened by specific users will be displayed in the chart. You can also select the **Unassigned** option to easily manage the unassigned cases. You can define the users below in the dialog box.

> If the **View All Cases** permission is inactive for the user role, the **Show Only Me** is the only available option.

5 In the **Find User** text box, type the name of the user whose case data you want to view in the chart. The search results are displayed in the **Available Users** box.

> The **Find User**, **Available Users**, and **Selected Users** text boxes are active only when the **Choose Specific Users to Display** option is selected in the **Data Filter** section.

6 In the **Available Users** box, select the user name. Only users who have any case assigned to them appear in the box. When there are more than 50 users, the **Available Users** box appears as an autocompleting text box.

> To select more than one user at a time, press and hold **CTRL** on the keyboard while clicking the user names.

7 Click the right double arrows button to move the selected user to the **Selected Users** box.

8 In the **Data** section, select the **Show Average Time Open for Workgroup** check box to display the average open time calculation for the whole workgroup within the chart. This option is active by default.

9 In the **Date Filter** section, define a date range to filter the information within the case metric. You can apply the following date filters:

- **Date Range** – From the drop-down list, define a date range to filter the information within the **Case Summary Pareto Chart** metric. The following options are available:
- **None** – Applies no date filter.
- **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the data for today.
- **Current Week** – Shows the data for the current week, no matter the current date.
- **Current Month** – Shows the data for the current month, no matter the current date.
- **Current Quarter** – Shows the data for the current three months, no matter the current date.
- **Current Year** – Shows the data for the current calendar year, no matter the current date.
- **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the data for the past week.
- **Last Month** – Shows the data for the past month.
- **Last Quarter** – Shows the data for the past three months.

- **Last Year** – Shows the data for the past year.
- **Last 30 Days** – Shows the data for the past 30 days.
- **Last 90 Days** – Shows the data for the past 90 days.
- **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon.
- **End Date** – Enter the end date in the text box manually or by using the calendar icon.
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

10 Click **OK**. The current filter appears on the case metric's title bar. The case metric filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

> When no data is available for the selected filter, the **No Chart Data** notification appears for the case metric.

Displaying Updates in the Dashboard Items

Navigation

Dashboards tab.

A dashboard item created from a report item is a snapshot (copy) of its settings, view, and filter. When you make changes to the report or report element that the dashboard item is sourced from, the dashboard item does not change. Thus, you can add one report element to the dashboard several times as different dashboard items to view and compare the data throughout the report updating process.

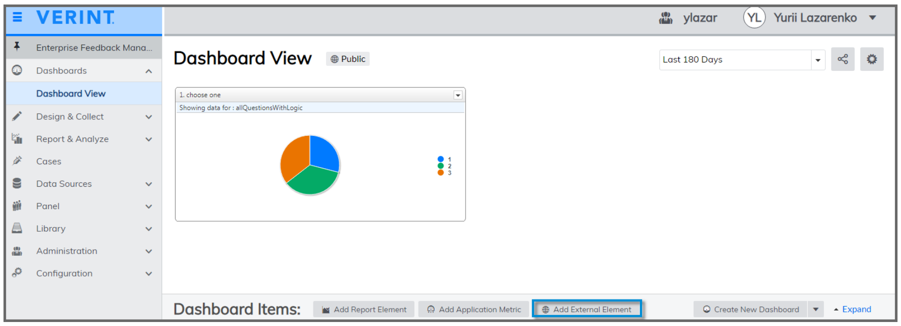
However, the dashboard item refers to the live survey data. If you make any changes to the survey, the dashboard item updates immediately. If you delete the source report or the source report element, it will no longer appear on the dashboard.

Adding external elements to the dashboard

Navigation

Dashboards tab > **Add External Element** button.

Add the Impact 360 Text Analytics, Feedback Intelligence, or Tableau elements to the dashboard to monitor the external source metrics directly within the dashboard.



The Add External Element button

The External Source feature is available only if you have a license for it and the external sources are activated for your workgroup.

External elements are not supported in the publicly shared dashboards.
If you add an external element to a publicly shared dashboard, you will stop sharing this dashboard.

Adding Feedback Intelligence documents to the dashboard

Navigation

Dashboards tab > **Add External Element** button.

You can add your documents from Feedback Intelligence to the dashboard to view all the relevant metrics on a common dashboard. The documents are directly connected to your Feedback Intelligence instance.

> The Feedback Intelligence documents are available if you have a license for the **Feedback Intelligence** feature.

Also the system administrator needs to configure Feedback Intelligence, and then activate the Feedback Intelligence connection for your workgroup under **FI Connections** > **Dashboard Usage**.

The Feedback Intelligence metrics appear on the dashboard as an open document in an IFrame. The Feedback Intelligence document supports single sign on so once you have connected to Feedback Intelligence and added the document to the dashboard, you do not have to log into Business Objects again. The Feedback Intelligence document is updated on the dashboard every time you log into the application or refresh the page and is saved automatically when you log out.

There is no date filter for the Feedback Intelligence external elements, and they are not affected by the dashboard date filter.

Use the **Add External Element** button in the bottom section to add external elements to the dashboard. When you add the Feedback Intelligence document to the dashboard, it appears in **Configure** mode. You can edit the element that you have added to the dashboard by using the **Configure Source** link.

When you click the **Configure Source** link, the **Edit Report Element** dialog box opens, where you can define the Feedback Intelligence document settings.

Add and configure a Feedback Intelligence external dashboard item

Procedure

1. In the **Add External Element** dialog box,click the **Source** button.
   The **Add a Report Element** dialog box shows the folders with the existing external sources, application metrics, surveys, and reports that you have access to.
2. Click the arrow next to the **External Sources** folder, and then select the **Feedback Intelligence** source.
   The source name is the display name of the Feedback Intelligence connection.
3. Click **Select**.
4. Click the **Select Element** button next to the **Feedback Intelligence Document** external element.
5. Click the **Add** button.
   The **Feedback Intelligence Document** external element appears on the dashboard with the **Configure Source** link.
6. Click the **Configure Source** link for the Feedback Intelligence external element.

7. In the **Edit Dashboard Element** dialog box,from the **External Source** list, select the source for the Feedback Intelligence document.
   The list contains all the available connections to Feedback Intelligence that you have added on the **Reports** tab.
8. From the **Document** list, select the document that you want to add to the dashboard.
   The list contains all the available Feedback Intelligence documents. The name of the selected document automatically becomes the name of the corresponding dashboard item.
9. In the **Filter Parameter** text box, type the query string filter.
   For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140. Put the ampersand character (&) in the beginning of the filter parameter text.
10. To limit the user access to the data, select the **Use Dashboard Viewer Authentication** check box.
    The data is what the user has access to only.
11. To save the selected settings, click **OK**.
    The dashboard item is updated immediately.

When the Feedback Intelligence external element is added to the dashboard, its default size is 100% width and 3x height. You can change the dashboard item size according to your needs.

Advanced filtering for external Feedback Intelligence dashboard items

Navigation

Dashboards tab > **Add External Element** button.

You can create user-specific dashboard items with the Feedback Intelligence elements to provide users with the information that is relevant to them only.

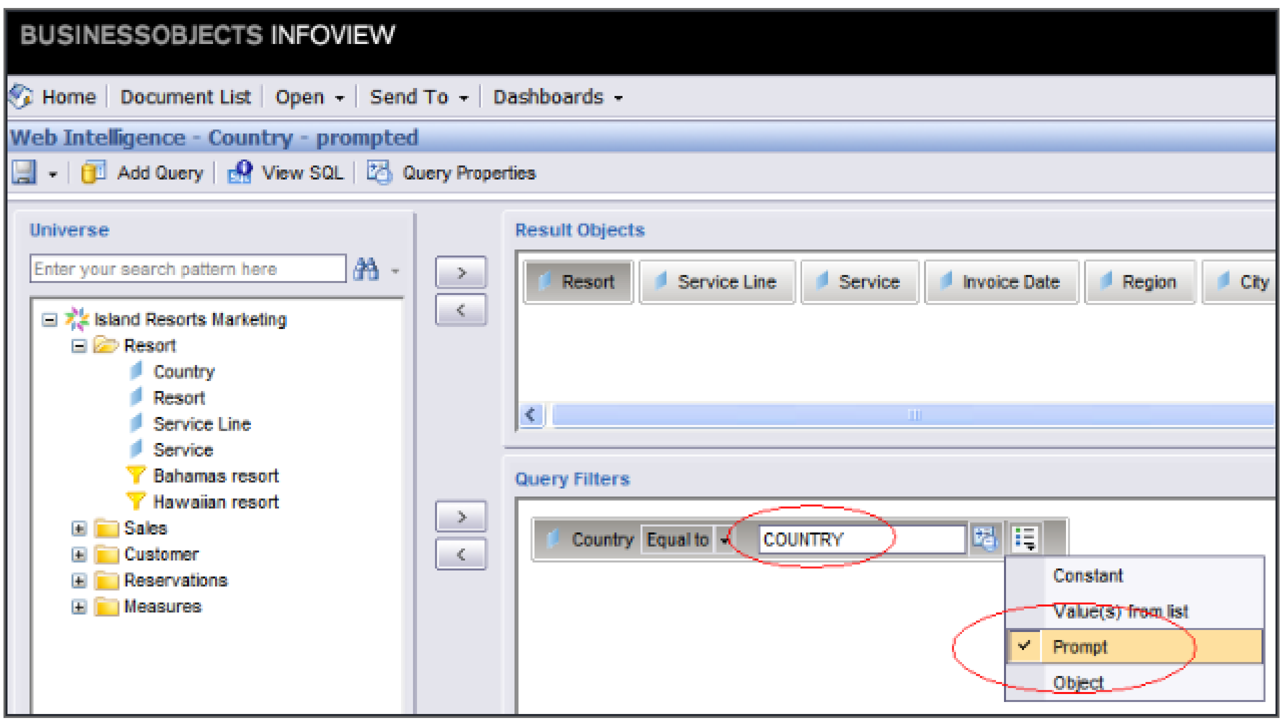
Advanced filtering syntax of Feedback Intelligence reports is defined by the capabilities of Business Objects (BO) OpenDocument reports. Since the Feedback Intelligence external dashboard item just shows a BO OpenDocument report in an iFrame, you can use the filtering parameters you put on the URL to control the report rendering as the filtering parameters for configuring the external dashboard item.

You can define the filter parameters while configuring an external dashboard element. The query string filter supports parameters that allow replacements based on the user meta data. When the report element is rendered, it replaces these parameters with the values from the currently logged in user.

Here is the information on how to pass the Feedback Intelligence report parameters from a Feedback Intelligence dashboard item.

I. Defining a prompted report parameter in a BO WebIntelligence Document

1. Within the WebIntelligence query builder, add a new query filter.
2. Set the value type to **Prompt**.
3. Provide a name identifier for the prompt. **COUNTRY** is selected in the example below.



Defining a prompted report parameter

II. Single and multi-valued prompt syntax in BO OpenDocument URL

The OpenDocument URL parameter parser uses the prefixes "lsS" and "lsM" to identify URL string parameters for prompts. When the URL parameter name attached to one of these prefixes matches the name of a prompt in the document, the associated value is passed into the query filter. Multiple prompt items can be passed in a single URL as single or multiple value parameters.

- Single value prompt parameter – lsS[NAME]
  - Example: &lsSCOUNTRY=France
- Multi-value prompt parameter – lsM[NAME]
  - Example: &lsMCOUNTRY=France;Germany;Italy;Spain

You can use the EFM users extended information in combination with the filters. This allows you to create one dashboard item, share it with many users, and have the dynamic filter based on the users extended information. For example, if you want to create a dynamic filter that filters by the users country, you can use the following parameter:

&lsSCOUNTRY=%user.country%

The supported parameters are:

%user.id%

%user.username%

%user.displayname%

%user.email%

%user.organization%

%user.department%

%user.jobtitle%

%user.country%

%user.state%

%user.province%

%user.telephone%

%user.fax%

%user.interests%

%user.employeecount%

%user.referredby%

%user.industry%

%user.registrationdate%

%user.registrationportal%

Registration date is a string. There is no guarantee that its content will follow any date format.

Adding Sentiment Summary External Element to Dashboard

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button.

You can add a **Sentiment Summary** element to the dashboard directly from the **Impact 360 Text Analytics** external source. Thus you can track your external Text Analytics data within the dashboard. When you add the **Sentiment Summary** external element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Sentiment Summary** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

> You can drill down into the sentiment summary chart to view responses.

Add and configure a Sentiment Summary external dashboard item

Procedure

1 Click the **Add External Element** button at the bottom of the **Dashboards** page.

2 In the **Add External Element** dialog box, click the **Source** button.
The **Add a Report Element** dialog box shows the folders with the existing external sources, application metrics, surveys, and reports that you have access to.

3 Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.

4 Click **Select**.

5 Click the **Select Element** button next to the **Sentiment Summary** external element.

6 Click the **Add** button.
The Sentiment Summary external element appears on the dashboard with the **Configure Source** link.

7 Click the **Configure Source** link for the sentiment summary chart.
The **Edit Dashboard Element** dialog box opens.

8 From the **External Source** list, select the source for the sentiment summary chart.
The list contains all available connections to Text Analytics that you have added on the **My Account** page.

9 From the **Project Name** list, select the project for your sentiment summary.
The list contains all available projects for the selected source.

10 From the **Model Name** list, select the model created in Text Analytics for data analysis.
The following options are available:
- **All Models** – The data based on all models is analyzed.
- **Theme Detection Model** – The data based on the theme detection default model is analyzed.

11 From the **Verbatim** list, select the question, which data will be analyzed in the sentiment summary chart.
You can select the **All** option to include all questions.

12 From the **Sort Order** list, select the option for the bar order in the chart.
You can select the **Descending (Positive to Negative)** or **Ascending (Negative to Positive)** option. By default, **Descending (Positive to Negative)** option is selected.

13 From the **Report by** list, select the data parameters upon which the chart is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics for each type of summary.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics for each type of summary. This option is selected by default.

14 In the **Filter Parameter** text box, type the Lucene filter string.
For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140. From the **Date Range** list, define a date range to filter the sentiment summary data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

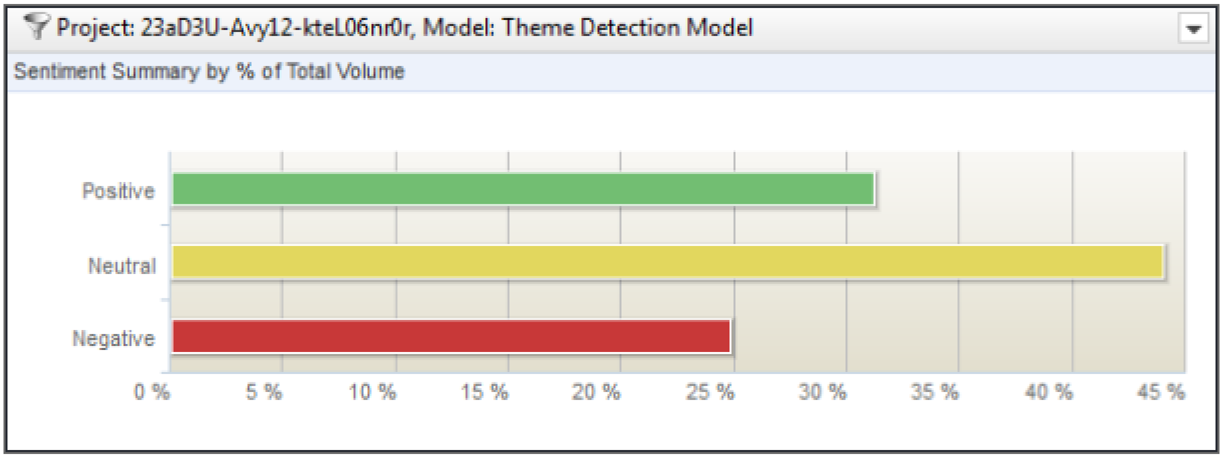
The following options are available:

- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.
- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

15 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

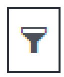
16 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

17 To save the selected settings, click **OK**.
The dashboard item is updated immediately.



The Sentiment Summary element on the dashboard

When no data is returned from the Impact 360 Text Analytics for the selected set of options, the **No data available** notification appears for the sentiment summary chart.

The current filter appears on the dashboard element's title bar. The dashboard element filter overrides the whole dashboard filter. Hover over the Filtered icon  to view the applied date filter in a tooltip. When the **Sentiment Summary** external element is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs.

Adding Sentiment Chart to Dashboard

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Chart** element > **Add** button.

You can add a **Sentiment Chart** element to the dashboard directly from the **Impact 360 Text Analytics** external source. Thus you can track your external text analytics data within the dashboard. When you add the **Sentiment Chart** external element to the dashboard, it appears in the **Configure** mode. You can select the settings for your sentiment chart by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

> You can drill down into the sentiment chart to view responses.

Add and configure a Sentiment Chart external dashboard item

Procedure

1. Click the **Add External Element** button at the bottom of the **Home** page.
2. In the **Add External Element** dialog box, click the **Source** button.
   The **Add a Report Element** dialog box shows the folders with the existing external sources, application metrics, surveys, and reports that you have access to.
3. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
4. Click **Select**.
5. Click the **Select Element** button next to the **Sentiment Chart** external element.
6. Click the **Add** button.
   The **Sentiment Chart** external element appears on the dashboard with the **Configure Source** link.
7. Click the **Configure Source** link for the sentiment chart.
   The **Edit Dashboard Element** dialog box opens.
8. From the **External Source** list, select the source for the sentiment chart.
   The list contains all available connections to Text Analytics that you have added on the **My Account** page.
9. From the **Project Name** list, select the project for your sentiment chart. The list contains all available projects for the selected source.
10. From the **Model Name** list, select the model created in Text Analytics for data analysis.
    The following options are available:
    - **All Models** – The data based on all models is analyzed.
    - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
11. From the **Verbatim** list, select the question, which data will be analyzed in the sentiment chart.
    You can select the **All** option to include all questions.
12. From the **Content** list, select the type of content you want to display in the sentiment chart.
    The following options are available:
    - Top Level Categories
    - Category Leaves

- Relationships
- Terms
- Structured Data

13 From the **Sort Order** list, select the option for the stacked bars order in the chart.
You can select the **Descending** or **Ascending** option. By default, **Descending** option is selected.

14 From the **Report by** list, select the data parameters upon which the chart is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics. If you select this option, the sentiment chart is displayed as a Sentiment Gap chart type.
- **Sentiment Distribution** – The dashboard item displays the sentiment chart (stacked Positive, Neutral, and Negative statements) where stacked bars are arranged by volume either in ascending or descending order according to the **Sort Order** option selected.

15 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-Detected Language
- Processed Language
- Document Date

16 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

17 From the **Date Range** list, define a date range to filter the sentiment chart data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

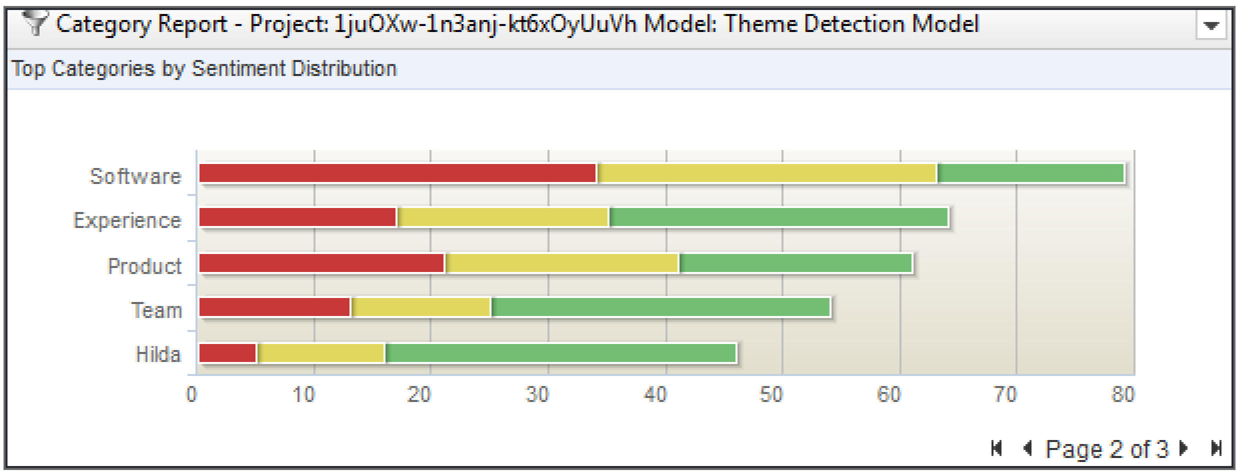
- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.

- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.
- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

18 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

19 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

20 To save the selected settings, click **OK**. The dashboard item is updated immediately.



The Sentiment Chart element on the dashboard

When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment chart.

The current filter appears on the dashboard element's title bar. The dashboard element filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

By default, the **Sentiment Chart** external element displays ten bars per page. Use the navigation arrows in the lower-right corner of the chart to navigate to the previous , next , first , or last page of the sentiment chart.

When the **Sentiment Chart** external element is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs.

- When the height is set to 1x, the chart displays 5 elements per page.

- When the height is set to 2x, the chart displays 10 elements per page.
- When the height is set to 3x, the chart displays 15 elements per page.

The Sentiment Trend Chart on the Dashboard

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Trend Chart** element > **Add** button.

You can add a **Sentiment Trend Chart** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source. Thus you can track the top ten data type items over the selected date range using the trend lines. When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Sentiment Trend Chart** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the sentiment trend chart to view responses.

Add and configure a Sentiment Trend Chart external dashboard item

Procedure

1. Click the **Add External Element** button at the bottom of the **Dashboards** page.
2. In the **Add External Element** dialog, lick the **Source** button.
   The **Add a Report Element** dialog box shows the folders with the existing external sources, application metrics, surveys, and reports that you have access to.
3. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
4. Click **Select**.
5. Click the **Select Element** button next to the **Sentiment Trend Chart** external element.
6. Click the **Add** button.
   The **Sentiment Trend Chart** external element appears on the dashboard with the **Configure Source** link.
7. Click the **Configure Source** link for the sentiment trend chart.
   The **Edit Dashboard Element** dialog box opens.
8. From the **External Source** list, select the source for the sentiment trend chart.
   The list contains all available connections to Text Analytics that you have added on the **My Account** page.
9. From the **Project Name** list, select the project for your sentiment trend chart.
   The list contains all available projects for the selected source.
10. From the **Model Name** list, select the model created in Text Analytics for data analysis.
    The following options are available:
    - **All Models** – The data based on all models is analyzed.
    - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
11. From the **Verbatim** list, select the question, which data will be analyzed in the sentiment trend chart.
    You can select the **All** option to include all questions.
12. From the **Content** list, select the type of content you want to display in the sentiment trend chart.
    The following options are available:
    - Top Level Categories

- Category Leaves
- Relationships
- Terms
- Structured Data

13 From the **Report by** list, select the data parameters upon which the chart is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

14 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-Detected Language
- Processed Language
- Document Date

15 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

16 From the **Date Range** list, define a date range to filter the sentiment trend chart data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

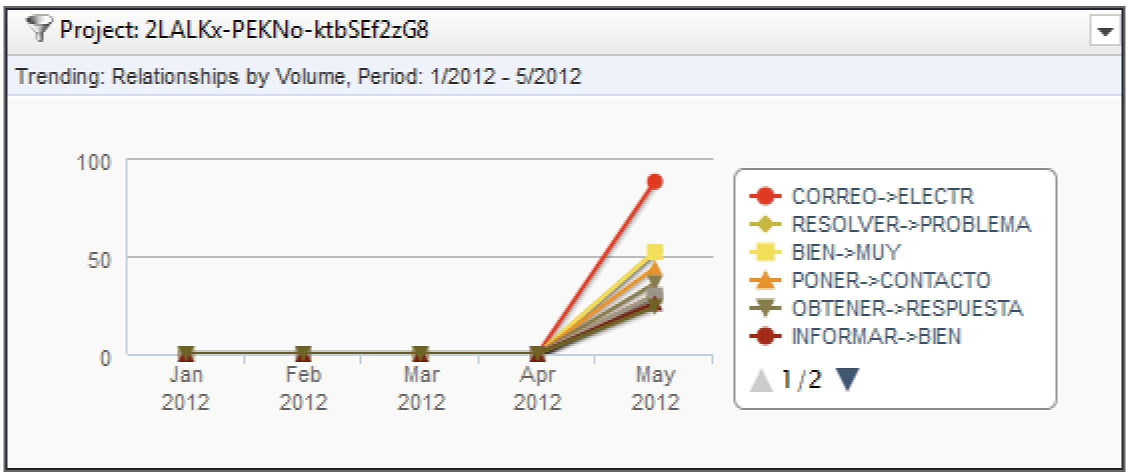
- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.

- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

17 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

18 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

19 To save the selected settings, click **OK**.
The dashboard item is updated immediately.



The Sentiment Trend Chart element on the dashboard

When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment trend chart.

The current filter appears on the dashboard element's title bar. Hover over the **Filtered** icon to view the applied date filter in a tooltip. The **Sentiment Trend Chart** external element added to the dashboard does not support the dashboard date filter.

When the **Sentiment Trend Chart** external element is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs.

- When the height is set to 1x, the chart displays 5 elements per page.
- When the height is set to 2x, the chart displays 10 elements per page.
- When the height is set to 3x, the chart displays 15 elements per page.

Adding Text Analytics elements to the dashboard

Navigation

Dashboards tab > **Add External Element** button.

You can add Text Analytics elements to the dashboard to track your Impact 360 Text Analytics external source metrics within the dashboard.

You can add the following text analytics elements:

- Adding Sentiment Summary External Element to Dashboard, page 129
- Adding Sentiment Chart to Dashboard, page 132
- The Sentiment Trend Chart on the Dashboard, page 136
- Sentiment Table external dashboard item, page 145
- Sentiment Trend Table external dashboard item, page 148
- Add Word Cloud External Dashboard Item, page 151
- Heat Map external item filtering, page 164

When you add the Text Analytics element to the dashboard, it appears in **Configure** mode. You can edit the element that you have added to the dashboard by using the **Configure Source** link.

When you click the **Configure Source** link, the **Edit Dashboard Element** dialog box opens, where you can define the Text Analytics element settings. If you do not set all the required parameters, the **Edit Dashboard Element** dialog box closes, and the report element stays in the **Configure** mode.

Advanced filtering for external Text Analytics dashboard items

Navigation

Dashboards tab > **Add External Element** button.

You can create user-specific dashboard items with the Text Analytics elements to provide users with the information that is relevant to them only.

The EFM application supports the native Lucene report filtering that Text Analytics provides. You can define the filter parameters while configuring an external dashboard element. The Lucene filter string supports parameters that allow replacements based on the user meta data. When the report element is rendered, it replaces these parameters with the values from the currently logged in user.

Here is the information on how to use some of the native Lucene filtering on verbatims and attributes in Text Analytics.

Verbatims

Equals

(_verbatimtype:Q1 +_words:\"tech support\")

Does not Equal

-(_verbatimtype:Q1 _words:\"tech support\")

Contains Phrase

(_verbatimtype:Q1 +_words:\"tech support\")

Does Not Contain Phrase

-(_verbatimtype:Q1 _words:\"tech support\")

Contains Word

(_verbatimtype:Q1 +_words:tech*)

Does Not Contain Word

-(_verbatimtype:Q1 _words:tech*)

Attributes

Equals

(Q1:\"10\")

Does Not Equal
(Q1:(NOT \"10\"))

Contains Phrase
(Q1:\"tech support\")

Contains Word
(Q1:(tech*))

You can use the EFM users extended information in combination with the filters. This allows you to create one dashboard item, share it with many users, and have the dynamic filter based on the users extended information. For example, if you want to create a dynamic filter that filters by the users department, you can use the following parameter:
(Q1:\"%user.department%\")

The supported parameters are:
%user.id%
%user.username%
%user.displayname%
%user.email%
%user.organization%
%user.department%
%user.jobtitle%
%user.country%
%user.state%
%user.province%
%user.telephone%
%user.fax%
%user.interests%
%user.employeecount%
%user.referredby%
%user.industry%
%user.registrationdate%
%user.registrationportal%

Dates are tested as a range in YYYYMMDD format.

Registration date is a string. There is no guarantee that its content will follow any date format.

Sentiment Trend Chart external dashboard item

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Trend Chart** element > **Add** button.

You can add a **Sentiment Trend Chart** element to the dashboard when the **Impact 360 Text Analytics** is selected as an external source. Thus you can track the top ten data type items over the selected date range using the trend lines.

When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Sentiment Trend Chart** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the sentiment table to view responses.

Add and configure a Sentiment Trend Chart external dashboard item

Procedure

1. In the **Add External Element** dialog box, click the **Source** button.
   The **Add a Report Element** dialog box shows the folder with the existing external sources, application metrics, surveys, and reports that you have access to.
2. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
3. Click **Select**.
4. Click the **Select Element** button next to the **Sentiment Trend Chart** external element.
5. Click the **Add** button.
   The **Sentiment Trend Chart** external element appears on the dashboard with the **Configure Source** link.
6. Click the **Configure Source** link for the sentiment trend chart.
   The **Edit Dashboard Element** dialog box opens.
7. From the **External Source** list, select the source for the sentiment trend chart.
   The list contains all available connections to Text Analytics that you have added on the **My Account** page.
8. From the **Project Name** list, select the project for your sentiment trend chart.
   The list contains all available projects for the selected source.
9. From the **Model Name** list, select the model created in Text Analytics for data analysis.
   The following options are available:
   - **All Models** – The data based on all models is analyzed.
   - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
10. From the **Verbatim** list, select the question, which data will be analyzed in the sentiment trend chart.
    You can select the **All** option to include all questions.
11. From the **Content** list, select the type of content you want to display in the sentiment trend chart.
    The following options are available:
    - Top Level Categories

- Category Leaves
- Relationships
- Terms
- Structured Data

12 From the **Report by** list, select the data parameters upon which the chart is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics for each type of summary. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

13 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-Detected Language
- Processed Language
- Document Date

14 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

15 From the **Date Range** list, define a date range to filter the sentiment trend chart data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.

- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

16 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

17 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

18 To save the selected settings, click **OK**.
The dashboard item is updated immediately.

> When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment table.

The current filter appears on the dashboard element's title bar. Hover over the **Filtered** icon to view the applied date filter in a tooltip. The **Sentiment Trend Chart** external element added to the dashboard does not support the dashboard date filter.

When the **Sentiment Trend Chart** external element is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs.

- When the height is set to 1x, the table displays 5 elements per page.
- When the height is set to 2x, the table displays 15 elements per page.
- When the height is set to 3x, the table displays 25 elements per page.

Sentiment Table external dashboard item

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Table** element > **Add** button.

You can add a **Sentiment Table** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source. You can use a **Sentiment Table** report element to view your text analysis results in a table. The color indicates the Positive, Neutral, and Negative sentiments. Using the **Sentiment Table** external element, you can view data for the terms, top level categories, category leaves, relationships, and structured data created within the responses to the question.

When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Sentiment Table** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the sentiment table to view responses.

Add and configure a Sentiment Table external dashboard item

Procedure

1. In the **Add External Element** dialog box, click the **Source** button.
   The **Add a Report Element** dialog box shows the folder with the existing external sources, application metrics, surveys, and reports that you have access to.
2. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
3. Click **Select**.
4. Click the **Select Element** button next to the **Sentiment Table** external element.
5. Click the **Add** button.
   The **Sentiment Table** external element appears on the dashboard with the **Configure Source** link.
6. Click the **Configure Source** link for the sentiment table.
   The **Edit Dashboard Element** dialog box opens.
7. From the **External Source** list, select the source for the sentiment table.
   The list contains all available connections to Text Analytics that you have added on the **My Account** page.
8. From the **Project Name** list, select the project for your sentiment table.
   The list contains all available projects for the selected source.
9. From the **Model Name** list, select the model created in Text Analytics for data analysis.
   The following options are available:
   - **All Models** – The data based on all models is analyzed.
   - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
10. From the **Verbatim** list, select the question, which data will be analyzed in the sentiment table.
    You can select the **All** option to include all questions.
11. From the **Content** list, select the type of content you want to display in the sentiment table.
    The following options are available:
    - Top Level Categories

- Category Leaves
- Relationships
- Terms (default option)
- Structured Data

12 From the **Sort Order** list, select the option for the value order in the sentiment table. You can select the **Descending** or **Ascending** option.

13 From the **Report by** list, select the data parameters upon which the table is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

14 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-detected Language
- Processed Language
- Document Date

15 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

16 From the **Date Range** list, define a date range to filter the sentiment table data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

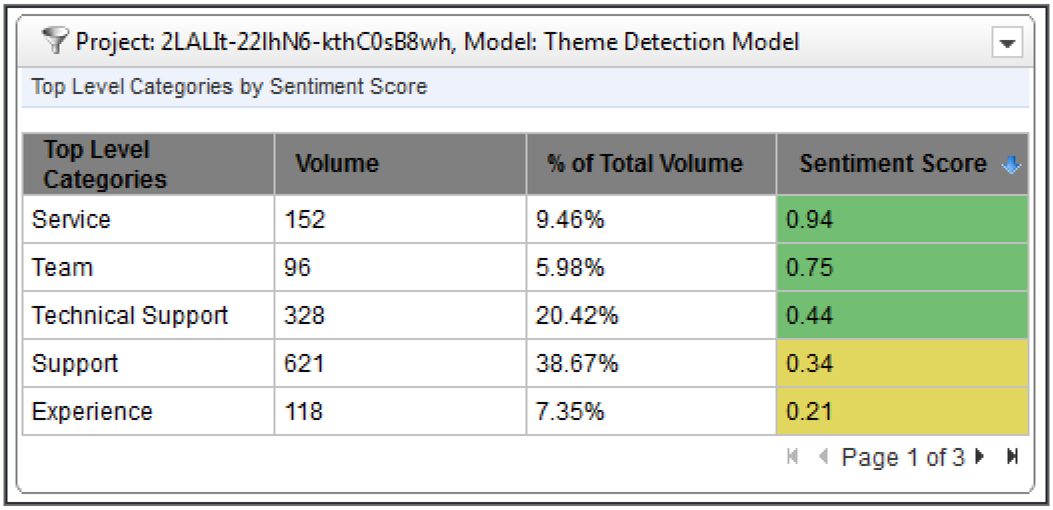
- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.

- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.
- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

17 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

18 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

19 To save the selected settings, click **OK**.
The dashboard item is updated immediately.



Top Level Categories	Volume	% of Total Volume	Sentiment Score
Service	152	9.46%	0.94
Team	96	5.98%	0.75
Technical Support	328	20.42%	0.44
Support	621	38.67%	0.34
Experience	118	7.35%	0.21

The Sentiment Table element on the dashboard

When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment table.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting.

The current filter appears on the dashboard element's title bar. The dashboard element filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip.

When the **Sentiment Table** external element is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs.

- When the height is set to 1x, the table displays 5 elements per page.
- When the height is set to 2x, the table displays 15 elements per page.
- When the height is set to 3x, the table displays 25 elements per page.

Sentiment Trend Table external dashboard item

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Trend Table** element > **Add** button.

You can add a **Sentiment Trend Table** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source. You can use the **Sentiment Trend Table** external element to view your text analysis results over the selected date range in a table. The color indicates the Positive, Neutral, and Negative sentiments. Using the **Sentiment Trend Table** external element, you can view data for the terms, top level categories, category leaves, relationships, and structured data created within the responses to the question.

When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Sentiment Trend Table** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the sentiment trend table to view responses.

Add and configure a Trend Table external dashboard item

Procedure

1 In the **Add External Element** dialog box, click the **Source** button.
The **Add a Report Element** dialog box shows the folder with the existing external sources, application metrics, surveys, and reports that you have access to.

2 Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.

3 Click **Select**.

4 Click the **Select Element** button next to the **Sentiment Trend Table** external element.

5 Click the **Add** button.
The **Sentiment Trend Table** external element appears on the dashboard with the **Configure Source** link.

6 Click the **Configure Source** link for the sentiment trend table.
The **Edit Dashboard Element** dialog box opens.

7 From the **External Source** list, select the source for the sentiment trend table.
The list contains all available connections to Text Analytics that you have added on the **My Account** page.

8 From the **Project Name** list, select the project for your sentiment trend table.
The list contains all available projects for the selected source.

9 From the **Model Name** list, select the model created in Text Analytics for data analysis.
The following options are available:
- **All Models** – The data based on all models is analyzed.
- **Theme Detection Model** – The data based on the theme detection default model is analyzed.

10 From the **Verbatim** list, select the question, which data will be analyzed in the sentiment trend table.
You can select the **All** option to include all questions.

11 From the **Content** list, select the type of content you want to display in the sentiment trend table. The following options are available:

- Top Level Categories
- Category Leaves
- Relationships
- Terms (default option)
- Structured Data

12 From the **Sort Order** list, select the option for the value order in the sentiment trend table. You can select the **Descending** or **Ascending** option.

13 From the **Report by** list, select the data parameters upon which the sentiment trend table is based. The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics.
- **% Change in Volume** – The dashboard item displays the percent change in the total number of distinct verbatims returned from Text Analytics over the selected date range.
- **% Change in Sentiment Score** – The dashboard item displays the percent change in the rolled-up sentiment score for each content type as returned from Text Analytics over the selected date range.

14 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-detected Language
- Processed Language
- Document Date

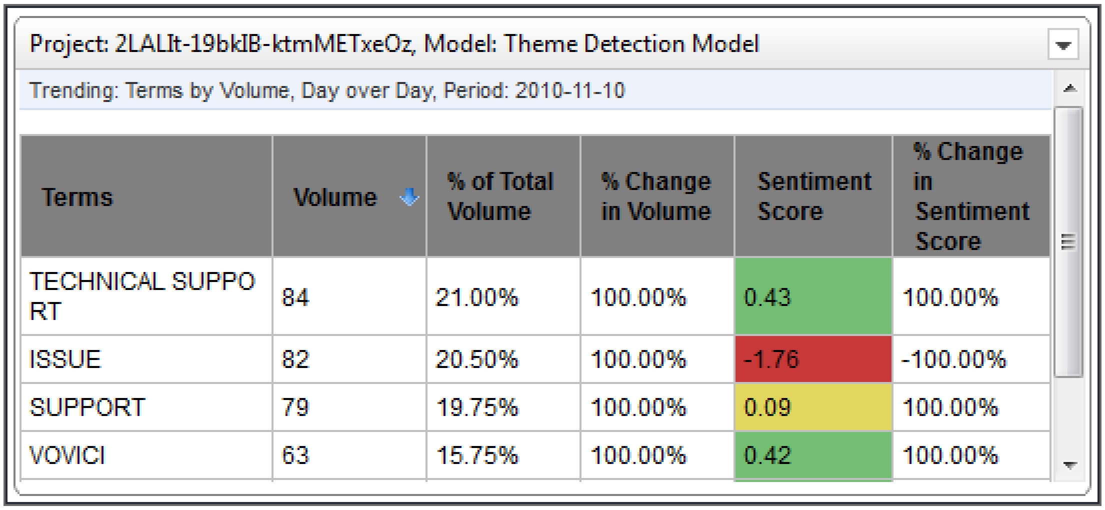
15 From the **Trend Over** list, define the period over which you want to track the data.
The following options are available:

- **Day over Day** – Shows the results on a daily basis.
- **Week over Week** – Shows the results on a weekly basis.
- **Month over Month** – Shows the results on a monthly basis.
- **Quarter over Quarter** – Shows the results on a quarterly (three months) basis.
- **Year over Year** – Shows the results on a yearly basis.

> You can view the date range in the **Start Date** and **End Date** text boxes. The sentiment trend table has no local date filter and is not affected by the dashboard date filter.

16 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

17 To save the selected settings, click **OK**.
The dashboard item is updated immediately.


Project: 2LALIt-19bkIB-ktmMETxeOz, Model: Theme Detection Model

Trending: Terms by Volume, Day over Day, Period: 2010-11-10

Terms	Volume	% of Total Volume	% Change in Volume	Sentiment Score	% Change in Sentiment Score
TECHNICAL SUPPORT	84	21.00%	100.00%	0.43	100.00%
ISSUE	82	20.50%	100.00%	-1.76	-100.00%
SUPPORT	79	19.75%	100.00%	0.09	100.00%
VOVICI	63	15.75%	100.00%	0.42	100.00%

The Sentiment Trend Table element on the dashboard

When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment trend table.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting.

When the **Sentiment Trend Table** external element is added to the dashboard, its default size is 50% width and 1x height. You can change the dashboard item size according to your needs.

- When the height is set to 1x, the table displays 5 elements per page.
- When the height is set to 2x, the table displays 15 elements per page.
- When the height is set to 3x, the table displays 25 elements per page.

Add Word Cloud External Dashboard Item

Navigation

Dashboards tab > **Add External Element** button > **Word Cloud** element > **Add** button.

You can add a **Word Cloud** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source.

Word cloud is a set of words represented as a cloud that appears in different size and color. The cloud gives greater prominence to words that occur more frequently in the source text. The color indicates the Positive, Neutral, and Negative sentiments. Using the **Word Cloud** external element, you can view data for the terms, top level categories, category leaves, relationships, and structured data created within the responses to the question.

When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Word Cloud** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the word cloud to view responses.

Add and configure a Word Cloud external dashboard item

Procedure

1. Click the **Add External Element** button at the bottom of the **Home** page.
2. In the **Add External Element** dialog box, click the **Source** button.
   The **Add a Report Element** dialog box shows the folders with the existing external sources, application metrics, surveys, and reports that you have access to.
3. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
4. Click **Select**.
5. Click the **Select Element** button next to the **Word Cloud** external element.
6. Click the **Add** button.
   The **Word Cloud** external element appears on the dashboard with the **Configure Source** link.
7. Click the **Configure Source** link for the word cloud.
   The **Edit Dashboard Element** dialog box opens.
8. From the **External Source** list, select the source for the word cloud.
   The list contains all available connections to Text Analytics that you have added on the **My Account** page.
9. From the **Project Name** list, select the project for your word cloud. The list contains all available projects for the selected source.
10. From the **Model Name** list, select the model created in Text Analytics for data analysis.
    The following options are available:
    - **All Models** – The data based on all the models is analyzed.
    - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
11. From the **Verbatim** list, select the question, which data will be analyzed in the word cloud.
    You can select the **All** option to include all the questions.

12 From the **Content** list, select the type of content you want to display in the word cloud.
The following options are available:

- Top Level Categories
- Category Leaves
- Relationships
- Terms (default option)
- Structured Data

13 From the **Report by** list, select the data parameters upon which the word cloud is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.

14 From the **Structured Attribute** list, select the attribute for the structured data content. This option is only available when you select **Structured Data** from the **Content** list.
The following options are available:

- Source ID
- Verbatim Type
- Auto-detected Language
- Processed Language
- Document Date

15 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

16 From the **Date Range** list, define a date range to filter the word cloud data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

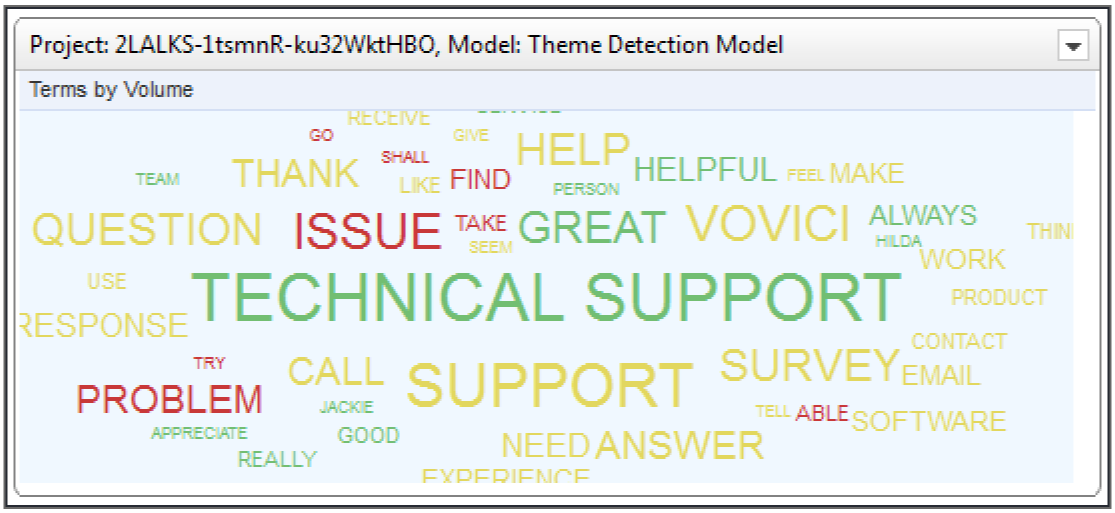
- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.

- **Last Quarter** – Shows the completed data for the past three months.
- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.
- **Last 180 Days** – Shows the completed data for the past 180 days.

17 In the **Start Date** text box, enter the start date manually or by using the calendar icon .

18 In the **End Date** text box, enter the end date manually or by using the calendar icon .

19 To save the selected settings, click **OK**.
The dashboard item is updated immediately.



The Word Cloud element on the dashboard

> When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the word cloud.

The current filter appears on the dashboard element's title bar. The dashboard element filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip. When the **Word Cloud** external element is added to the dashboard, its default size is 33% width and 1x height. You can change the dashboard item size according to your needs.

Add Heat Map External Dashboard Item

Navigation

Dashboards tab > **Add External Element** button > **Heat Map** element > **Add** button.

You can add a **Heat Map** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source.

Heat map is a graphical representation of data that appears in different size and color. The size indicates volume of words that occur more frequently in the source text. The color indicates the Positive, Neutral, and Negative sentiments. Using the Heat Map external element, you can view data for top level categories and category leaves created within the responses to the question.

When you add the text analytics element to the dashboard, it appears in the **Configure** mode. You can select the settings for your **Heat Map** element by using the **Edit Dashboard Element** dialog box that you can access via the **Configure Source** link.

You can drill down into the heat map to view responses.

Add and configure a Heat Map external dashboard item

Procedure

1. Click the **Add External Element** button at the bottom of the **Dashboards** page.
2. In the A**dd External Element** dialog box, click the **Source** button.
   The **Add a Report Element** dialog box shows the folder with the existing external sources, application metrics, surveys, and reports that you have access to.
3. Click the arrow next to the **External Sources** folder, and then select the **Impact 360 Text Analytics** source.
4. Click **Select**.
5. Click the **Select Element** button next to the **Heat Map** external element.
6. Click the **Add** button.
   The **Heat Map** external element appears on the dashboard with the **Configure Source** link.
7. Click the **Configure Source** link for the heat map.
   The **Edit Dashboard Element** dialog box opens.
8. From the **External Source** list, select the source for the heat map.
   The drop-down list contains all available connections to Text Analytics that you have added on the **My Account** page.
9. From the **Project Name** list, select the project for your heat map.
   The list contains all available projects for the selected source.
10. From the **Model Name** list, select the model created in Text Analytics for data analysis.
    The following options are available:
    - **All Models** – The data based on all models is analyzed.
    - **Theme Detection Model** – The data based on the theme detection default model is analyzed.
11. From the **Verbatim** list, select the question, which data will be analyzed in the heat map.
    You can select the **All** option to include all questions.

12 From the **Content** list, select the type of content you want to display in the heat map.
The following options are available:

- **Top Level Categories** (default option) – The top level category appears as the parent category at the top of the square. The individual category leaves appear as child categories under the corresponding top level category.
- **Category Leaves**

13 From the **Sort Order** list, select the option for the value order in the heat map. You can select the **Descending** or **Ascending** option. By default, the **Descending** option is selected.
With the **Descending** option selected, the heat map presents the top ten largest values. With the **Ascending** option selected, the heat map presents the top ten lowest values.

14 From the **Report by** list, select the data parameters upon which the heat map is based.
The following options are available:

- **Volume** – The dashboard item displays the data based on the total number of distinct verbatims returned from Text Analytics. This option is selected by default.
- **% of Total Volume** – The dashboard item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The dashboard item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

15 In the **Filter Parameter** text box, type the Lucene filter string. For details on how to build filters, see Advanced filtering for external Text Analytics dashboard items, page 140.

16 From the **Date Range** list, define a date range to filter the word cloud data. You can filter only completed data.

> The dashboard date filter does not work for external elements unless you add them from the report designer.

The following options are available:

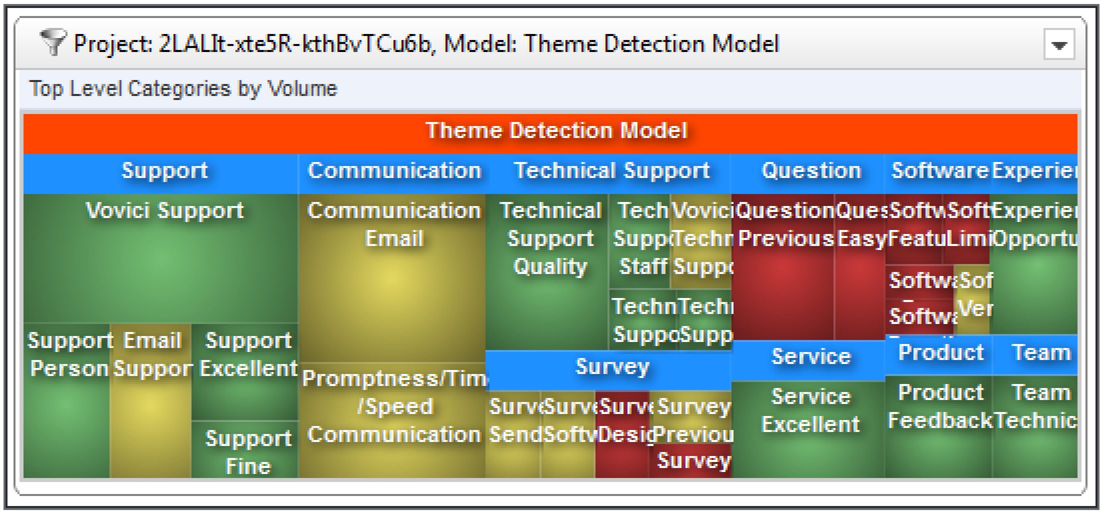
- **None** – Applies no date filter.
- **Custom** – Shows the completed data for the date range that you specify. Enter the start date and end date of your custom filter in the corresponding text boxes.
- **Today** – Shows the completed data for today.
- **Current Month** – Shows the completed data for the current month, no matter the current date.
- **Current Quarter** – Shows the completed data for the current three months, no matter the current date.
- **Current Year** – Shows the completed data for the current calendar year, no matter the current date. This filter is selected by default.
- **Year to Date** – Shows the completed data for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the completed data for the past week.
- **Last Month** – Shows the completed data for the past month.
- **Last Quarter** – Shows the completed data for the past three months.
- **Last Year** – Shows the completed data for the past year.
- **Last 30 Days** – Shows the completed data for the past 30 days.
- **Last 90 Days** – Shows the completed data for the past 90 days.

- **Last 180 Days** – Shows the completed data for the past 180 days.

17 In the **Start Date** text box, enter the start date manually or by clicking the calendar icon .

18 In the **End Date** text box, enter the end date manually or by clicking the calendar icon .

19 To save the selected settings, click **OK** .
The dashboard item is updated immediately.



The Heat Map element on the dashboard

> When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the heat map.

The current filter appears on the dashboard element's title bar. The dashboard element filter overrides the whole dashboard filter. Hover over the **Filtered** icon to view the applied date filter in a tooltip. When the **Heat Map** external element is added to the dashboard, its default size is 50% width and 2x height. You can change the dashboard item size according to your needs.

Sentiment Summary external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Sentiment Summary** external element to the dashboard to display the overall sentiment for the open-ended questions in a bar chart. The overall sentiment is broken down by positive, negative, and neutral responses.

On the **Sentiment Summary** chart, you can click a sentiment bar and view the text that represents a portion of the chart. You can switch between the different sentiments and data types and view the full respondents' answers.

You can drill down into the **Sentiment Summary** chart to view responses.

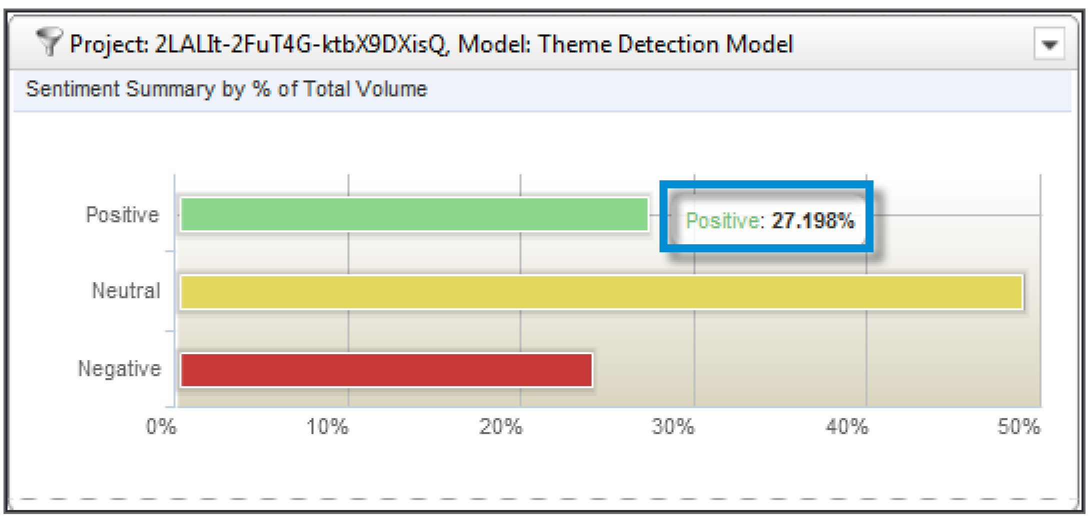
Filter responses by Sentiment

Procedure

1 Add a **Sentiment Summary** external element to the dashboard.

2 Click the **Configure Source** link in the **Sentiment Summary** element.

3 Configure your **Sentiment Summary** chart.



The hover over percentage on the sentiment summary chart

4 Click the sentiment bar within the chart to filter responses by sentiment.
The **View Responses** dialog box opens with all sentences that contributed to that sentiment regardless of the data type.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10.** You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll among the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

You can drill down into the **Sentiment Summary** chart to view responses.

Sentiment Chart external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Sentiment Chart** element to the dashboard to display your Text Analytics report in a sentiment chart. Thus you can track the sentiment breakdown by content type. On a sentiment chart, you can click a top level category name or the bar within the chart and view the text that represents a portion of the chart. You can switch between the different sentiments and top level categories and view the full respondents' answers.

You can drill down into the sentiment chart to view responses.

Filter responses by Top Level Categories and Sentiment

Procedure

1 Add a **Sentiment Chart** external element to the dashboard.

2 Click the **Configure Source** link in the **Sentiment Chart** element.

3 Configure your sentiment chart, and then select **Top Level Categories** as a content type and **Sentiment Distribution** as a **Report by** option.

4 Click the sentiment bar next to the top level category within the chart to filter responses. The **View Responses** dialog box opens with all sentences that contributed to that top level category and sentiment.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. The categories appear in the same order as on the chart. Thus, categories with the most number of responses appear at the top of the list. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Sentiment Trend Chart external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Sentiment Trend Chart** element to the dashboard to display your text analytics report in a sentiment trend chart. Thus you can track Top Level Categories over the selected date range by clicking the trend lines.

On a sentiment trend chart, you can click a top level category and view the text that represents a portion of the chart. You can switch between the different sentiments and top level categories and view the full respondents' answers.

You can drill down into the sentiment trend chart to view responses.

Filter responses by Top Level Categories

Procedure

1. Add a **Sentiment Trend Chart** external element to the dashboard.
2. Click the **Configure Source** link in the **Sentiment Trend Chart** element.
3. Configure your sentiment trend chart, and then select **Top Level Categories** as a content type.
4. Click the trend line within the chart to view responses.
   You can hover over a top level category to view its name. The **View Responses** dialog box opens with all sentences that represent that top level category based on the specified trend period regardless of the sentiment.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option is a default option and shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Sentiment Table external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Sentiment Table** element to the dashboard to view your text analysis results in a table. The color indicates the Positive, Neutral, and Negative sentiments.

On a sentiment table, you can click a top level category name and view the text that represents a portion of the table. You can switch between the different top level categories and view the full respondents' answers.

> You can drill down into the sentiment table to view responses.

Filter responses by Top Level Categories

Procedure

1. Add a **Sentiment Table** external element to the dashboard.
2. Click the **Configure Source** link in the **Sentiment Table** element.
3. Configure your sentiment table, and then select **Top Level Categories** as a content type.
4. Click the top level category name within the table to filter responses.
   The **View Responses** dialog box opens with all sentences that contributed to that top level category regardless of the sentiment. See images below.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option is a default option and shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

> You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Sentiment Trend Table external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Sentiment Trend Table** element to the dashboard to view your text analysis results over the specified period in a table. On a sentiment trend table, you can click a top level category name and view the text that represents a portion of the trend table. You can switch between the different top level categories and view the full respondents' answers.

> When no data is returned from the **Impact 360 Text Analytics** for the selected set of options, the **No data available** notification appears for the sentiment trend table.

Filter responses by Top Level Categories

Procedure

1. Add a **Sentiment Trend Table** external element to the dashboard.
2. Click the **Configure Source** link in the **Sentiment Trend Table** element.
3. Configure your sentiment trend table, and then select **Top Level Categories** as a content type.
4. Click the top level category within the trend table to filter responses.
   The **View Responses** dialog box opens with all sentences that contributed to that top level category based on the specified trend period regardless of the sentiment. See images below.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option is a default option and shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

> You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Word Cloud external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Word Cloud** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source. Thus you can track the sentiment breakdown by content type.

On a word cloud, you can click a top level category name and view the text that represents a portion of the word cloud. You can switch between the different sentiments and top level categories and view the full respondents' answers.

> You can drill down into the word cloud to view responses.

Procedure

1. Add a **Word Cloud** external element to the dashboard.
2. Click the **Configure Source** link in the **Word Cloud** element.
3. Configure all settings for your word cloud, and then select **Top Level Categories** as a content type.
4. Click the top level category name within the word cloud to filter responses.
   The **View Responses** dialog box opens with all sentences that contributed to that top level category regardless of the sentiment.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text** link appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

> You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Heat Map external item filtering

Navigation

Dashboards tab > **Add External Element** button > **Sentiment Summary** element > **Add** button > **Configure Source** link > click the sentiment bar within the chart > **View Responses** dialog box.

You can add a **Heat Map** element to the dashboard when **Impact 360 Text Analytics** is selected as an external source. Thus you can track the breakdown by **Top Level Categories** by using the heat map. On a heat map, you can click a top level category name and view the text that represents a portion of the heat map. You can switch between the different sentiments and top level categories and view the full respondents' answers.

You can drill down into the heat map to view responses.

Filter responses by Top Level Categories

Procedure

1 Add a **Heat Map** external element.

2 Click the **Configure Source** link in the **Heat Map** element to your dashboard.

3 Configure all settings for your heat map, and then select **Top Level Categories** as a content type.

4 Hover over a segment to view the text that represents a portion of the heat map.

5 Click the top level category name within the heat map to filter responses by top level category. The **View Responses** dialog box opens with all sentences that contributed to that top level category regardless of the sentiment.

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

When you hover over the responses text, the **Show More Text link** appears. To see the full response text, click the **Show More Text** link.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

You can select only one category and one sentiment at a time. For long category names, hover over the name to view the full text.

Add Tableau elements to the dashboard

Navigation

tab > **Add External Element** button.

You can add views created in Tableau to the EFM dashboard to monitor and analyze your report data in the EFM application.

Before you begin

- Ensure that the Tableau Server feature and the tab are configured for your workgroup.
- Ensure that the **External Sources** permission is enabled for your workgroup.

Procedure

1. On the **Dashboards** page, click the **Add External Element** button.
2. In the **Add External Element** dialog box, click **Source**.
3. In the **Add a Report Element** dialog box, click **Tableau**, and then click **Select**.
4. In the **Add External Element** dialog box, click **Select Element**, and then click **Add**.
   The Tableau report element is added to the dashboard.
5. In the **Tableau Report Element**, click the **Configure Source** link.
6. In the **Source** dialog box, in the **Select Tableau View** list, click one of the Tableau views, and then click **OK**.
   The Tableau view is applied to the dashboard element and is as interactive as in the Tableau application.

> All users who have access to the workbook in Tableau, can see the Tableau elements on the EFM dashboard.

7. To edit the Tableau element, click the **Edit in Tableau** button (available only for the Publisher of the Tableau workbook).

> You can interact with Tableau elements on the EFM dashboard according to your site role in the Tableau application. If you have the Viewer permissions, you can only view the Tableau elements on the EFM dashboard. If you have the Publisher permissions for the Tableau workbook, you can edit the Tableau elements by using the **Edit in Tableau** button.

8. To repeat or discard your changes, click the **Undo**, **Redo**, or **Revert** button correspondingly.
9. To share the Tableau elements with other users, on the EFM dashboard, click **Share**.

> The Tableau elements are shared and displayed to the users who have permissions to see them in the Tableau application.

Tableau view

If you have a dashboard with the Tableau element, or if you delete all the elements from your dashboard except the Tableau element, the Tableau view is automatically applied to your dashboard.

The Tableau view is different from the standard dashboard view. If you have the Tableau view, the following advantages are available:

- Full-page view of dashboard element
- Menu with **Duplicate**, **Share**, **Edit**, and **Delete** options
- Editable dashboard title

You can change the Tableau view to the standard dashboard view by adding a new report element.

Design and Collect

Topics

My Surveys grid

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page.

You can open, design, collect, analyze, view, organize, customize, copy, and delete your surveys. You can also customize the appearance and number of surveys displayed in the grid.

On the **Viewing** menu, you can select the following folders:

- **My Surveys** – View a list of the created surveys.
- **For Review** – View a list of surveys that are being reviewed.
- **Shared Surveys** – View a list of surveys shared with you by other users.
- **Other Users' Surveys** – View a list of surveys created by other users.
- **Recycle Bin** – View a list of surveys that you deleted from your folders.
- **Workgroup** – The workgroup hierarchy is available if you have the **View All Surveys** permissions. The root workgroup is your scoped workgroup. When you select a workgroup on the **Viewing**, all surveys for all users in the selected workgroup and its child workgroups appear in the grid.

The My Surveys folder

The following options are available on the **Actions** menu:

- **Duplicate** – Duplicate the selected survey. In the **Duplicate a Survey** dialog box, you can include all campaigns, participants, and reports associated with this survey by selecting corresponding check boxes or just duplicate a survey without them. For more information, see Duplicate a survey, page 190.
- **Rename** – Change the name of the selected survey.
- **Delete** – Move one or more selected surveys to the recycle bin. You can also select the check box in the column header to select all surveys. If a survey is used as a source in a data set, you cannot delete the survey.
- **Share** – Provide users the **Full Access** to view and edit the selected survey or the **View Access** to view the selected survey.
- **Change Owner** – Select a user to be a new survey owner.
- **New Folder** – Create a new folder or subfolder.
- **Move** – Move the selected survey to a different folder. On the **Actions** menu, point to **Move**, and then click the necessary folder.
- **Preview** – Preview the selected survey in a new window. You can preview all surveys with the **Open**, **Closed**, or **Design** status.
- **Review History** – View the history of all changes made to the survey.

The Recycle Bin folder

The following options are available on the **Actions** menu:

- **Restore** – Move the selected survey from the recycle bin to its original folder location.

- **Delete Permanently** – Delete the selected survey permanently from the recycle bin. This action removes the survey from the application with all the associated participants lists, invitations, and reports.

> The option is available if you have the **Allow users to permanently delete surveys from the Recycle Bin** check box selected, the **Manage Data Policies** permission to view the **Data Policies** page, and the **Permanently Delete Surveys** permission.To disable the **Delete Permanently** option, clear the check box.

> You can schedule the automatic survey deletion for all your closed surveys on the **Configuration** tab > **Data Policies** tab > **Surveys** tab > **Data Retention** section.

- **Preview** – Preview the selected survey in a new window. You can preview all surveys with the **Open**, **Closed**, or **Design** status to ensure that you want to delete the selected survey before deleting it permanently.

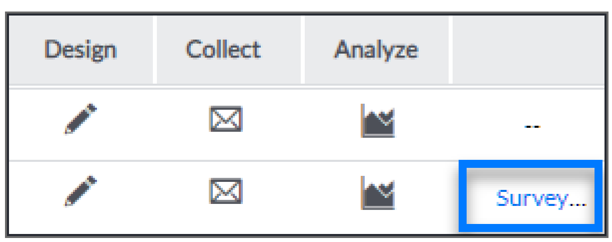
Search for a survey

To search for a survey in the **My Surveys** grid, enter the survey name, tag, or author in the **Search** box on the toolbar, and then click **Search**. The results of the search appear in the grid with the corresponding notification. To delete the search results, click the **Clear** link.

Links

In the **My Surveys** grid, the following links are available for each survey:

- **Design** – Click to create, edit, and review your survey.
- **Collect** – Choose how to collect the results from your survey
- **Analyze** – Export response data from your survey into .xlsx, .csv, and .tsv files.
- **Survey Link** – Click to view a live version of the selected survey.



The Survey link

With the following links, you can:

- **Design** – Create, edit, and review questions and properties.
- **Collect** – Choose how to collect your survey.
- **Analyze** – Export response data from your survey into .xlsx, .csv, and .tsv formats.

The **Survey Link** is only available for the opened surveys.

Organize the My Surveys grid

To sort your surveys by survey titles, status, or the last modified date, click the corresponding column heading. By default, your surveys are sorted by the last modified date.

You can also change column widths by dragging the edge of column headers.

By default, the **My Surveys** grid shows the first 10 surveys. To view more items per page, use the **View per Page** option at the bottom of the **My Surveys** grid. Click 25, 50, or 100 to display more surveys.

Folder structure

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Viewing** menu.

> If you have no saved surveys, the **Welcome Page** is displayed and the **Folder Structure** feature is not applied until you save a survey.

With the Folder Structure feature, you can add folders and subfolders to your **My Surveys** folder. Use this feature to organize your surveys. Once you create a folder or subfolder, you can rename, move, or delete it.

If you are a survey administrator, you can select another user to see their **My Surveys** folder. This folder is selected by default. However, if you select other users' folder, you can view the contents of their **My Surveys** folder.

> If you are not a survey administrator, you can only view your own folder structure.

In addition, when you create a new survey, it is saved in the folder or subfolder you have selected in the folder structure of your **My Surveys** page. For example, if you open a folder titled **My Business Surveys**, and then create a new survey, the new survey is saved to the **My Business Surveys** folder.

You can also view the surveys of other users and organizations within your workgroup.

Add a new folder

Procedure

1. Go to the **My Surveys** grid > **Actions** menu, click **New Folder**.
   A dialog box opens.
2. In the text box, enter a name for the new folder, and then click **OK**.
3. On the **Viewing** menu, your new folder appears.

Add a new subfolder

Procedure

1. On the **Viewing** menu, select the folder you want to add your subfolder to.
2. On the **Actions** menu, click **New Folder**. A dialog box opens.
3. In the text box, enter a name for the new folder. Click **OK**.
4. On the **Viewing** menu, your new folder displays.

My Survey folder enhancements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Viewing** menu.

The new enhancements to the survey folders include:

- Side and bottom scrolling bars to easily access all of your folders and surveys.
- Easily move folders and subfolders – You can drag-and-drop folders/subfolders to a new location in the left pane.
  OR
  To manage folders/subfolders, go to the **My Surveys** grid > **Actions** menu > click **Move**.
- New **Other Surveys** folder – If you have the proper permission, you can see other user's survey folders at this location.
- Administrative users have the ability to move user folders through the **Other Surveys** folder structure. Moving folders produces warning alerts for your safety.

Search for a survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Advanced Search**.

With the search functionality, you can search and locate a particular survey per a workgroup.

Procedure

1 On **My Surveys** page, next to **Quick Filters**, click the **Advanced Search** link.

2 On the **Search** page, click the drop-down arrow in the search box (next to **Survey name contains**), and then select your option criteria.
There are the following options:

- **Survey name contains** – Use this option if you know the survey name or a keyword from the name.
- **Author name contains** – Add the name as a criteria, if you know the survey author.
- **Tag name contains** – Search for a survey by its tags.
- **URL of survey** – Search by survey URL if you have access to the URL (possibly through an invitation or reminder that was sent).
- **Project ID equals** – Search by survey ID number.
- **Created before** – Use this option that is used in conjunction with a specified date.
- **Created after** – Use this option that is used in conjunction with a specified date.
- **Opened before** – Use this option that is used in conjunction with a specified date.
- **Opened after** – Use this option that is used in conjunction with a specified date.

3 In the adjacent text box, add your search text.

4 Click the **Search** button, and then your results appear.

Additional options

You can add multiple search criteria by clicking the **Add Criteria** link. Add your criteria, and then click the **Search** button.

To remove one criteria, click the **Remove** link.

To remove all criteria, click the **Reset Criteria** button.

There are two options available in the **Match** section:

- **All Criteria** – Conducts the search based on each criteria you specify and returns only the surveys that meet all criteria.
- **At Least One** – Returns surveys that match at least one of the criteria specified.

Search results

If the user search for any keyword with the **Survey name contains** search option, the search results show the following information (if available):

- Survey Name

- Survey Description
- Survey Author Name and Email Address
- Workgroup Name
- Survey Created Date
- Survey Opened Date (if a survey is published)
- Link to Survey

Hiding the Surveys start page

Navigation

Log in to the EFM application > **Surveys** start page.

You can skip the **Surveys** start page if you do not want to create new surveys.

> If you do not have permissions to create surveys, you skip the **Surveys** start page automatically.

Hide the Surveys start page

Procedure

1. Log in to the EFM application.
2. The **Surveys** start page opens, if you do not have any saved surveys.
3. To hide the **Surveys** start page and quickly access the other functionality, click the **Don't show this page again** link.

If you hide the **Surveys** start page, you go directly to the **My Surveys** page.

Restore the Surveys start Page

Procedure

1. Go to **My Account** option > **My Account** tab.
2. Above the **Define Log-on Experience** section, click the **Reset Hidden Help Messages** button. The **Surveys** start page is restored, and notification appears at the bottom of the **My Account** side tab saying that the help messages are reset.

> Keep in mind that clicking the **Reset Hidden Help Messages** button restores all hidden help messages, including the banner on the **My Surveys** page and confirmation dialog boxes.

My Surveys hide banner

Navigation

Surveys tab > **Hide This** button.

You can hide the banner on the **My Surveys** page to view a larger list of surveys and reduce the amount of scrolling through the page.

To hide the banner, on the **My Surveys** page, click the **Hide This** button.

The Hide This button

To restore all help messages including the hidden banner on the **My Surveys** page and confirmation dialog boxes for deleting your survey pages and questions, go to the **My Account** tab and click the **Reset Hidden Help Messages** button.

Snapshots

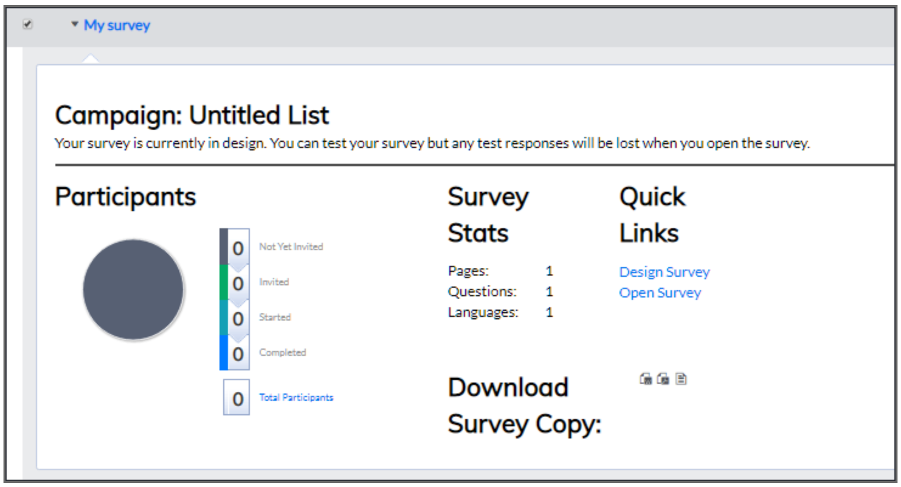
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > click the arrow next to the survey for which you want to view a snapshot.

The snapshot provides different information depending on the current survey status (**Design**, **Open**, or **Closed**). You can view only one survey snapshot at a time. For multiple-campaign surveys, the last added campaign is displayed in the snapshot.

To view a snapshot of your survey, click the black arrow next to the survey name.

When the survey is in the **Design** mode, a snapshot shows up to three survey pages with five questions across all pages. You can use the available links and options to design, download, test your survey, and select the method to collect your survey results.



Snapshot of survey in Design mode

To close an open snapshot, click the arrow next to the survey title. The current snapshot is also closed when you open a new snapshot.

When the survey is in the **Open** mode, a snapshot shows a summary of the **Overview** dashboard. You can use the available options to view and export the survey responses and create reports on the current survey results.

When the survey is in the **Closed** mode, a snapshot shows the final survey results. You can use the available links and options to analyze results of your survey as well as open your survey again or edit your survey schedule, etc.

Feedback Intelligence Snapshots

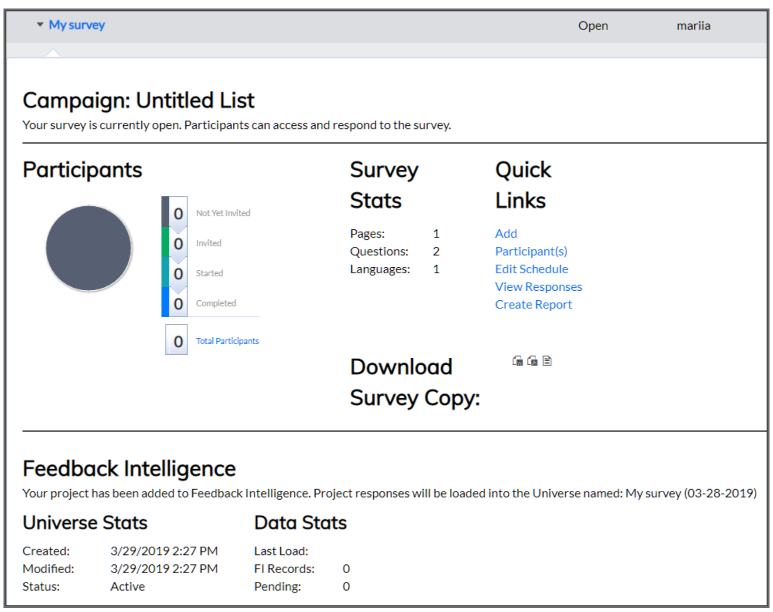
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > click the arrow next to the survey for which you want to view a snapshot.

If a survey is added to Feedback Intelligence by your system administrator, the Feedback Intelligence statistics is displayed in the survey expansion under the survey list.

The Feedback Intelligence statistics contain the universe name, universe statistics, and data statistics:

- **Created** – Date the universe was created.
- **Modified** – Last time when the universe was changed. The date is changed only in connection with the **Push to Feedback Intelligence** updates.
- **Status** – Current universe status in Feedback Intelligence.
- **Last Load** – Last time when the responses were processed by Feedback Intelligence.
- **FI Records** – Number of records that are added to the Feedback Intelligence database response table.
- **Pending** – Number of records waiting to be added to Feedback Intelligence. This number includes all records that were not added to Feedback Intelligence previously.



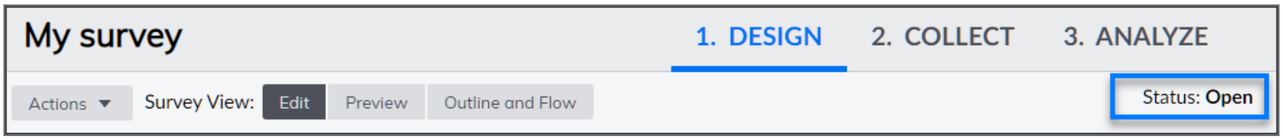
Feedback Intelligence statistics

Survey status definitions

There are three survey status options: **Design**, **Open**, and **Closed**. For details about each of the statuses, see Survey Status, page 549.

You can view the status of your survey in the following places in the application:

- **My Surveys** page > **Status** column
- **Design** view > **Action** toolbar
- **Collect** view > **Overview** dashboard or **Campaigns** dashboard (for multiple-campaign surveys)



Status in Design view

Design Mode

A survey is in the design mode when it is first created and remains in the design mode until the survey is opened for the first time. The Design mode is where you add your questions and apply appearance options. In addition, you can copy, move, or delete your questions in this mode. To create a survey, select the **Design from Scratch** option on the **Welcome** page or **My Surveys** page. For details, see Survey designer overview, page 226.

> Once a survey is changed to the **Open** mode, it can never return to the design mode. Changes can be made in the **Open** mode and applied, but the status remains as the **Open**. The modification of the previously published questions might impact the collected results.

Open Mode

Procedure

1. Log in to the EFM application.
2. In the **My Surveys** grid, click the needed survey.
3. In the **Collect** view, and then select one of the distribution methods.
   If you select the **Generate Link** distribution method, the **Open Survey** dialog box opens straight away.
4. In the **Open Survey** dialog box, click the **Open Survey Now** button.
   You are then provided with a URL for your survey that you can distribute to your participants.

> If you make changes to your survey while in the **Open** status, a note appears notifying you to apply your changes.

Closed Mode

Your survey is moved to the **Closed** mode when you close the survey.

To close a survey that is in the **Open** mode, in the **Collect** view, click **Close Survey Now**.

> Testing a survey has no implication on the status of a survey in any mode. A survey can be tested and re-tested as often as needed and the status will not change.

Navigation based on the survey status

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page.

On the **My Surveys** page, click the survey, and that triggers the following:

- For surveys with the **Design** status, the **Design** view opens.
- For surveys with the **Open** status, the **Collect** view opens.
- For surveys with the **Closed** status, the **Analyze** view opens.

If you have no access the **Analyze** view, for example, nothing will happen when you click the survey name in the **My Surveys** grid.

Exporting a survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Actions** menu > click **Export** > select the required option for the survey export.

You can now export your survey to the .docx, .pdf, or .que format. In addition, you receive an e-mail report if the task takes longer than two minutes.

- **.doc** and **.pdf** – These options enable you to save the survey to a file that can be printed or forwarded to others.
- **.que** – This option enables you to save the survey to a file that is an .xml document and contains all the important design information applied in the **Design** view. You can send this file to another EFM user to create a new survey.

You can also export translated surveys to the .doc and .pdf formats. It is possible to export all survey translations to one document. Each translation then begins from the new page in the document indicating the language of the translation in the caption.

Procedure

1. In the **Design** viewl, on the **Actions** menu on the toolbar, click **Export**, and then select the corresponding file format.
   The available options are .docx, .pdf, and .que.
2. When exporting to MS Word, select the **Content Review** survey type if you want to include all the survey logic into the export file.
3. When exporting to MS Word or PDF, select the translated surveys from the **Survey Language(s)** menu.
4. Click **Export**.
   The export file is generated in the selected format.
5. Click the link with the file name to save or open the file.

Survey export preview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Actions** menu > **Preview** option.

You can preview all of your survey on one page and print it out to edit, store, or share. The **Preview** window shows all questions, except for the hidden questions, and does not include menus and buttons. The **Preview** mode is available for all existing surveys in the **Design**, **Open**, or **Closed** status. You can also preview your survey in the **Recycle Bin** folder to ensure that you want to permanently delete your survey.

How to print a survey

1. On the **My Surveys** page, select a check box next to the survey that you want to print.
2. Click the **Preview** button on the toolbar.
   The print preview version of your survey appears in a new browser window.
3. On the **File** menu, click **Print**.
4. Set up your print options, and then click **Print**.

MS Word and PDF export options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Actions** menu > **Export** > **Microsoft Word** or **PDF** option > **Export Survey** dialog.

When you export a survey to the **Microsoft Word** or **Adobe PDF** format, you can choose between the following two types of the survey to export:

- **Content Review** – Include all survey branching and conditional visibility. This option is selected by default.
- **Paper Survey** – Include only survey questions and text.

Content Review

Include survey branching and conditional visibility into the export file. The following logic is exported:

- Advanced branching
- Question destinations
- Choice destinations
- Notifications about the conditional visibility of pages, questions, choices, and rows

The question headings are exported automatically regardless of the survey settings.

If the survey contains one or more branches, in the export file, they appear at the end of the pages they are evaluated on. The branch set to be evaluated at the end of the randomized or rotated block, in the export file, appears at the end of each page in the block.

Paper Survey

Include only survey questions and text into the export file. The question headings are exported according to your survey settings. The question destinations are exported if they are defined in the survey.

You can view the details about the **Export Survey** event on the **Administration** tab > **System Tasks** tab.

If the survey export takes more time than the specified timing on the **My Account** page for the task to be completed, you can close the **Export Survey** dialog box and task will continue running in the background. When task is completed, the email message with a link to the survey export will be sent to you.

Push a survey to Feedback Intelligence

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Actions** menu > **Push to Feedback Intelligence** option.

You can update and filter your surveys in Feedback Intelligence with the **Push to Feedback Intelligence** option. This option is available if your survey is published by you and added to Feedback Intelligence by a System Administrator of your workgroup. The System Administrator can also turn the **Push to Feedback Intelligence** option on or off for a certain survey. You can push to FI a survey with one or multiple campaigns.

> When you update the existing survey in Feedback Intelligence, changes that you made to the survey may affect the previously generated Feedback Intelligence universe, which may change or damage the existing reports. If you have reports based on this survey, it is recommended that you discuss your survey changes with a support manager before submitting this update.

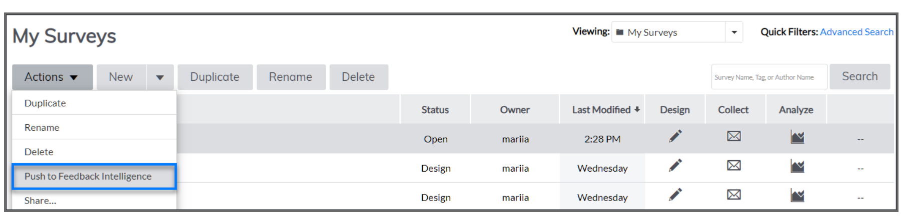
When a survey is added to Feedback Intelligence, you can access and filter responses from all campaigns.

You can view and use the following columns for creating report elements in Business Objects and Tableau: **Current Survey**, **Respondent Fields**, **Panelists**, **Profiles**, **Surveys**, **Respondent System Information**, **Respondent Location**, **Campaign ID**, **Campaign Name**, **Campaign Type**, and **Campaign Status**.

> If you added a survey to Feedback Intelligence when the possibility to send only the first campaign was supported, to make all campaigns available in Feedback Intelligence for reporting, push the survey to Feedback Intelligence again.
>
> All survey campaigns that have the **Active** status are exported to Feedback Intelligence.

Procedure

1. On the **Surveys** tab, select the survey that you want to update in Feedback Intelligence.
2. On the **Actions** menu, click **Push to Feedback Intelligence**.
3. In the confirmation dialog box, click **OK**.
   Your survey is marked to be updated in Feedback Intelligence.



The Push to Feedback Intelligence option

Export a survey to EFM Offline Mobile (PC edition)

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Actions** menu > **Export** option.

You can export a survey to the .que format, and then import it into the EFM Offline Mobile (PC edition) product to conduct it offline.

> You cannot import SMS surveys and Require a Passcode surveys to EFM Offline Mobile (PC edition).

Some functionality that is available in EFM is not available for use with the EFM Offline Mobile. This includes:

- Hierarchical questions
- Image Upload questions
- Quota Management
- Event triggers while taking the survey
- End Page Redirects/URLs if not online
- Web Services Event Handler

Before you begin

- Open a survey.
- Add the Offline Device campaign to your survey on the **Collect** tab (Adding multiple campaigns to survey, page 586).

Procedure

1. Go to the **Design** view of the survey designer.
2. On the **Actions** menu on the toolbar, click **Export**, and then click **EFM Offline Mobile**.
   The export file is generated in the .que format.

> You can also export your survey to EFM Offline Mobile directly from the Offline Devices widget on the **Collect** tab (see Adding multiple campaigns to survey, page 586).

3. To save or open the file, in the **Export to EFM Offline Mobile** dialog box, click the link with the file name.
4. Click **Close**.

> For details about importing the exported survey into the EFM Offline Mobile (PC edition) product, refer to the **EFM Offline Mobile Quick Start Guide**.

Share a survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Actions** menu.

You can share your survey to allow other users or organizations to access your survey. You can share any existing survey from the **My Surveys** page or from the **Properties** tab in the left pane of the survey designer. The following sharing options are available:

- **View Access** – The user can only view the survey shared with that specific user.
- **Full Access** – The user can view and edit the survey shared with that specific user.

You can also share multiple surveys with several people at a time. When multiple surveys are selected, you can only add Authors or Viewers. Open an individual survey to view who has access and remove Authors or Viewers as needed.

> You can share surveys only when the survey sharing permission is activated for your user role.

In the **Share Access** dialog box, the list of users and organizations contains maximum 200 user names. To search for specific user or organization, use the search box at the top of the list.

You can share a survey with only some users from an organization if you do not want to share your survey with the whole organization.

Procedure

1 On the **My Surveys** page, select the check box next to the survey that you want to share.

2 On the **Actions** menu, click **Share**.

3 In the **Share Access** dialog box, you can view a list of users and organizations.

4 Select a check box next to the user or an organization from this box, and then click the right arrow to move them to the **Full Access** or **View Access** box.

> All users assigned to the selected organization as well as all child organizations will be moved to the selected right box too. You can move back the users or organizations you do not want to share the survey with, by selecting the corresponding check boxes and clicking the left arrows button.

5 To send the email notification to the users allowed to view or edit the survey, select the **Notify Users by Email** check box.
The check box is selected by default.

> All users assigned to the selected organization will receive the email notification of the survey being shared with them. The email will include a link to the shared survey.

6 Click **OK**.

7 In the **Notify Users** dialog box, edit your email notification, and then click **OK**.

> The **Notify Users** dialog box opens only when the **Notify Users by Email** check box is selected.

Stop the survey sharing

Select a single survey to view the list of users who have access to it and stop the survey sharing.

Procedure

1 On the **My Surveys** page, select the check box next to the previously shared survey.

2 On the **Actions** menu, click **Share**.
The **Share Access** dialog box opens.

3 In the **Full Access** or **View Access** text box, select the check boxes next to the users or organizations that you want to stop the survey sharing with.

4 Click the left double arrows button to move the selected user to the left text box.

5 Click **OK**.
The survey is no longer available for the users and organizations.

Duplicate a survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Actions** menu > **Duplicate** option.

You can copy your survey instead of creating and designing a new one from scratch. The survey duplicate is an unpublished survey without any of the responses received in the original survey.

> The copied survey is in the **Modern** survey rendering by default, even if the original survey is in the **Classic** survey rendering.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

To avoid duplicating a survey that contains the insecure code, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

Procedure

1. In the **My Surveys** grid, select a survey that you want to duplicate.
2. On the **Actions** menu, click **Duplicate**.
3. In the **Duplicate a Survey** dialog box, in the **Survey Name** box, change the duplicate survey name if needed.
4. To include all campaigns associated with this survey, select the corresponding check box. The invitations and reminders for each campaign, as well as the survey logic based on **Campaign Name** are also copied to the duplicate survey.

> This option is unavailable for an SMS surveys.

5. To include all reports associated with this survey, select the corresponding check box.

> If your survey report has a set filter based on **Campaign Name**, when including both campaigns and reports, the filter will be duplicated as well. When including only one of the options, the filter data will be lost.

   This option is unavailable if there are no reports for the survey.

6. To include all participants associated with this survey, select the corresponding check box. This option is unavailable if the **Include all campaigns associated with this survey option** is not selected.

> All the participants are copied into the duplicate survey with the **Not Sent** status.

7. Click **OK**.

The duplicate of your survey is displayed in the **My Surveys** grid.

> If a survey has weighting defined, the survey duplicate preserves this weighting.

Delete a survey permanently

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Delete** button > **Viewing** menu > **Recycle Bin** option > **Actions** menu > **Delete Permanently** option.

The Delete Permanently feature is used to remove a survey from your system and all associated invitations, reports, and participant lists.

> To permanently delete surveys, you must have the **Manage Data Policies** permission to view the **Data Policies** page, the **Permanently Delete Surveys** permission, and the **Allow users to permanently delete surveys from the Recycle Bin** check box selected. Go to **Administration** > **Roles**, and then click the name of the role you want to edit.

> To test Delete Permanently feature, make a copy of any survey, and then follow the procedure.

Procedure

1. On the **My Surveys** page, delete a survey.
   The deleted survey is moved to the **Recycle Bin** folder.
2. Go to the **Viewing** > **Recycle Bin** folder, select the check box next to the survey that you want to delete permanently.
3. On the **Actions** menu, click **Delete Permanently**.
4. In the warning dialog box, type the word **DELETE** (all caps), and then click the **Delete** button.

Tips

1. There are safeguards to ensure surveys are not permanently deleted accidentally (**Delete Permanently** warning dialog box). If you ignore all of the warnings and permanently delete your survey, there are no options to restore it.
2. If you get to the point of receiving the warning dialog box, and decide you do not want to delete the survey, simply click **Cancel**.
3. You will be able to view a report or survey that had piped in responses from the deleted survey.
4. Permanently deleting a survey does not impact the panelist health score.

Automatic survey permanent deletion

Navigation

Configuration tab > **General** tab.

A Group Administrator can activate the automatic survey permanent deletion to permanently delete surveys from the recycle bin to stay compliant with contractual obligations involving customer data.

To activate this option, on the **General** tab, on the **Configuration** tab, select the **Enable automatic survey permanent deletion** check box.

> The automatic survey permanent deletion is disabled by default.

You can define the time duration a survey is stored in the recycle bin before it is permanently deleted by the system. Enter the number of days in the Survey Hard Deletion Days text box in the Delete permanently setup section.

> You can enter only whole numbers in the Survey Hard Deletion Days text box.

By default, the duration of survey storage in the recycle bin before automatic permanent deletion is set to 45 calendar days. To disable automatic survey permanent deletion, set it to 0 days.

> The Survey Hard Deletion Days text box is only active when the Enable automatic survey permanent deletion check box is selected.

The permanent deletion date shows in the warning message when you move the survey from the My Surveys page to the recycle bin. Keep in mind that you will lose all survey data including links and responses without any chance to restore it after permanent deletion.

The **Enable automatic survey permanent deletion** check box is available for group administrators only. For example, when you log in as a survey administrator, you have a limited view of the **General Setup** page functionality. In such case, you can disable the automatic survey permanent deletion by selecting the **Disable Permanent Survey Deletion** for Survey Authors check box.

When the automatic survey permanent deletion is activated, the **Permanent Deletion Date** column displays in the **My Surveys** grid in the **Recycle Bin** folder, showing the date of survey permanent deletion.

Activate the Automatic Survey Permanent Deletion

Procedure

1. Go to the **Configuration** tab > **General** tab.
2. On the **General Setup** page, select the **Enable automatic survey permanent deletion** check box.
3. In the **Survey Hard Deletion Days** text box, enter the number of days a survey is stored in the recycle bin.
4. Click **Save Setup**.
5. In the warning message, click **Continue**.

Create a survey from Scratch

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option.

You can create a survey from scratch in two ways:

- By using the **New** menu on the **My Surveys** page.
- By using the corresponding button on the survey welcome page.

Procedure

1. On the **My Surveys** page, in the **New** menu, click **Design from Scratch**.
2. In the **Name Your Survey** dialog box, type the name for your survey, and click **OK**.
   The new survey opens in survey designer.
3. In Survey Designer, add and edit your survey questions, configure survey logic and design options, export, and test your survey.

Create from Word

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Import Survey** option.

You can create a survey by importing it from a Microsoft Word (.doc and .docx) or EFM survey (.que) file using the **Import Survey** option.
Importing from Microsoft Word is recommended for experienced users of the application who can build the survey using special formatting in the document. In the **Import Survey** dialog box, you can download a Microsoft Word survey example for your reference.

You can access the **Import Survey** option in the following ways:

- By using the **New** menu on the **My Surveys** page.
- By using the corresponding button on the survey welcome page.

When you import a file into the survey, the **Design** tab opens with the first question selected. You can edit your survey, save changes to it, and then publish it.

> The imported survey is defaulted to **Modern** survey rendering, even if the original survey is in **Classic** survey rendering.
> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

> To avoid importing a survey that contains the insecure code, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

Procedure

1. On the **My Surveys** page, from the **New** menu, select **Import Survey**.
2. In the **Import Survey** dialog box, click **Browse** to navigate to the file that you want to upload.
   The available file formats are Microsoft Word (.doc and .docx) and EFM survey (.que).
3. Select the file, and then click **Open**.

> The **Create Survey** button is available when you upload a file.

4. Click the **Create Survey** button.
   The survey created from the selected file is opened in survey designer.

Create from template

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Use a Template** option.

You can create a survey from a wide variety of predefined templates that are available within the EFM library. The template already contains the questions, which makes creating a survey quicker and more efficient.

You can access the **Use a Template** option in the following ways:

- By using the **New** menu on the **My Surveys** page.
- By using the corresponding button on the survey welcome page (if you have no saved surveys yet).

When you create a survey using the template, the **Design** tab opens with the first question selected. You can edit your survey, save changes to it, and then publish it.

Procedure

1. On the **My Surveys** page, from the **New** menu, select **Use a Template**.
2. From the **Use a Template** dialog box, select a template from the list.

> To preview a template in the right pane, click the needed template.

3. Click the **Create Survey** button.

   The survey with the selected template opens in Survey Designer.

Distribution Events calendar

Navigation

Design & Collect tab > **Events** tab > **Distribution Events** page.

With the **Distribution Events** calendar, can view all survey distribution events that have been scheduled by using the EFM application.

Distribution events for all your surveys appear on the calendar. The group administrators can also view the survey distribution events for the workgroup. On the **Distribution Events** page, a calendar appears in the left pane showing the survey distribution events scheduled for the current month. You can navigate through the calendar by using navigation arrows at the top.

In the **Distribution events to display** section, select check boxes next to the following events to be displayed on the calendar:

- Opening date
- Closing date
- Invitation date
- Reminder date
- Thank You message date

You can hover over an icon to view the event information in a tooltip. When multiple events are scheduled for a single day, the Plus icon appears next to the event icon on the calendar.

The detailed 24-hour view of the current week is displayed to the right. To open the **Overview** dashboard for the corresponding survey, click the event icon.

If the survey is scheduled for transaction events, a corresponding notification is displayed below the calendar.

To open the **Overview** dashboard for the survey, in the notification, click the survey name link.

Distribution Events quick filtering

Navigation

Design & Collect tab > **Events** tab > **Distribution Events** page > **Quick Filters** option.

You can filter survey events. Quick filters are predefined filters you can use to quickly get to the survey events that you need.

The following options are available:

- **Owned by Me** – View all events of the surveys owned by you.
- **Shared with Me** – View all events of the surveys shared to you or your organization.

When you apply a quick filter to the surveys, a notification describing the current filter appears on the **Distribution Events** page.

To cancel the filtering, click the **Clear** link.

You can view the owner of the survey event you do not own by hovering over the event icon in the calendar.

Polls page

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

You can create polls to collect answers to a single question quickly and easily without designing a full survey. Use polls to gain feedback from your respondents on a hot topic or current event and view the results immediately.

The **Polls** page provides you information on each poll you created. You can sort polls by clicking the column heading. To change the width of a column, drag its edge. In addition, you can display more or fewer polls on the Polls page. At the bottom of the page, a toolbar enables you to adjust the number of polls that displays on one page. The default number of polls per page is 10; however, you can select up to 100 polls to display on the Polls page.

To manage all polls, select the check box in the upper-left corner of the **Polls** page.

The following columns are available on the **Polls** page.

- **Poll Title** – Name of a poll, which is your poll question.
- **Last Modified** – Last time when you made changes to the poll.
- **Total Responses** – Total number of poll answers collected from respondents.
- **Preview Poll** – View how your poll will actually appear to participants on your Web page.
- **View Code Snippets** – View the HTML code of a poll to copy this code to your Web page.
- **View Results** – View the current poll statistics, which includes the total number of poll responses and their breakdown.

Create a new poll

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

You can create polls to collect answers to a single question quickly and easily without designing a full survey. Use polls to gain feedback from your respondents on a hot topic or current event and view the results immediately.

Procedure

1 On the **Polls** tab, click the **New** button on the **Polls** toolbar to create a new poll. The following dialog box opens where you can specify your main poll information, such as your poll question and its type, up to ten response options, predefined count values, text of the poll buttons, and your poll closing date.

- **Poll Question** – Type your own poll question, for which you want to collect answers from respondents.
- **Option** – Type response options of your poll question.
- **Count** – Type numbers to predefine answers for your poll participants. This option is useful if you want your poll to initially show data rather than zeros.

> The numbers you enter into the "Count" fields are included in your poll results. Deduct these numbers from your final statistics to get your actual poll results.

- **Vote Button Text** – Edit text of the **Vote** button in your poll if needed.
- **View Results Button Text** – Edit text of the **View Results** link in your poll if needed.

> If you include the **View Results** link into your poll, poll participants can click this link to skip directly to the poll results without casting a vote.

- **Style of Poll** – Specify the type of your poll question. The following options are available:
  - **Choose One** – Enable your poll participants to choose only one answer to your poll question.
  - **Choose Many** – Enable your poll participants to choose more than one answer to your poll question.
  - **Star Rating** – Enable your poll participants to rank variables by using the star rating. The number of stars matches the number of question choices, for example, if there are 5 choices in the question, you can rate each choice from 1 to 5 stars. When you hover over the star, the current star and all preceding stars appear in yellow, and the current choice text is displayed in a tooltip. Respondents can answer the question by clicking the star under the selected position.
- **Close poll to voting and display the results after** – Specify the date when you want your poll to close and stop accepting responses.

2 After completing your main poll information, click the **Next** button. The following dialog box opens where you can control the appearance of your poll and its results by customizing the font, color, borders, and so on.

3 To save your poll and close the dialog box, click **Finish**.

- **Select a Style** – Select the poll style from the drop-down list. The available options are gray, green, purple, red, and white. If you change any of the predefined settings, you create your own "custom" style, which appears automatically in the "Select a Style" drop-down list.

You can view any changes you make to your poll and its results appearance in the right dialog box pane under the **Polls** and **Results** example immediately.

- **Font** – Select the font type of your poll and its results from the drop-down list.
- **Size** – Select the font size of your poll and its results from the drop-down list.
- **Font Color** – Select the font color of your poll and its results from the drop-down list. You can select from a range of colors in the Web Palette, RGB (Red, Green, and Blue) Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value). If you know the hexadecimal value of a color, you can type it in the provided field.
- **Background Color** – Select the background color of your poll and its results from the drop-down list.
- **Result Bar Color** – Select the result bar color of your poll results from the drop-down list.
- **Border Color** – Select the border color of your poll and its results from the drop-down list.
- **Border Style** – Select the border style of your poll and its results, such as solid, dotted, dashed, and double.
- **Width** – Select the width of borders in pixels.
- **Poll/Results Width** – Select the width of your poll and its results in pixels. The default value of your poll size is 150 pixels.
- **Display Results as** – Select an appropriate option to show the poll results as percentages, count, or both.
- **Include total response count in chart** – Select this check box to show total number of votes at the bottom of the poll results table.
- **Include option to jump directly to results** – Select this check box to include the View Results link into your poll, which allows poll participants to jump directly to the poll results without casting a vote.

Preview a poll

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

Use polls to gain feedback from your respondents on a hot topic or current event and view the results immediately. After designing your poll, you can preview it before distributing the code. You can interact with the question to observe the presentation of the question and results.

Procedure

1 In the **Polls** list, click the **Preview** link next to the poll you want to preview.

You can edit the poll to correct the text and presentation characteristics by clicking the poll question in the **Polls** list to open the question in the editor.

Add a poll to your website

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

After creating your poll, you need to add it to your website so that poll participants can vote.

Procedure

1. On the **Polls** tab, click the **View Code Snippets** link for a specific poll. The dialog box opens where you can view the HTML code of your poll.
2. Select all content within the text box and copy it.
3. Switch to the HTML editor of your website and insert this code into the location where you want your poll to display. After you added the copied HTML code to your website, your poll appears on it and is active and ready to collect votes.

If you do not copy the entire HTML code snippet or edit it, your poll may perform incorrectly.

It is strongly recommended that you do not edit the HTML snippet for a poll, though you may need to adjust the formatting. Keep in mind that if you edit the HTML snippet for a poll, each poll's script tag (<script>) must have an associated anchor tag (<a>) with an ID attribute matching the poll's ID.

Tips on Adding a Poll to Your Web Page

- You must have rights to edit the Web page where you want to add the poll.
- JavaScript must be enabled in the browser's settings. JavaScript is used to handle the poll vote submission and poll and results display.
- Cookies must be enabled in the browser's settings. Cookies are used to track voting and control what you see once you have taken the poll. If you answer a specific poll, the results appear, otherwise the poll appears.
- Multiple polls can be placed on the same Web page and will act independently of each other. Each poll has its own cookie value. By default, one vote per respondent per poll is allowed.

Track your poll results

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

After adding your poll to a Web page, you begin to collect responses and can track the poll results.

Procedure

1 On the **Polls** tab, click the **View Results** icon for a specific poll.

The dialog box opens where you can view the current poll statistics, which includes the total number of poll responses and their breakdown.

Delete a poll

Navigation

Design & Collect tab > **Polls** tab > **Polls** page.

You can remove a poll if you no longer need it anymore.

Procedure

1 On the **Polls** tab, select the check box next to the poll you want to delete, and then click **Delete** on the **Polls** toolbar.

2 Click **Delete** in the confirmation dialog box.

When you delete a poll, remove the HTML snippet for your poll from any web page where you have inserted the poll. If you do not remove the HTML snippet, users will see the error message.

Intercepts

Topics

Map single survey intercepts

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Message** tab in the left pane.

An intercept lets you automatically invite your website visitors to participate in online surveys. When a website visitor is intercepted, an invitation message is displayed to the visitor directly on your website. The Web site visitor can either accept or decline the invitation.

The **Web Intercepts** functionality is available if you have a license for the **Web Intercepts** feature.

On the **Intercepts** tab, you can create, copy, rename, and delete intercepts. The intercept is a container for your survey. You can add one survey to the intercept, and then delete it and add another survey to it. In such case, you do not need to update the intercept code snippet. All intercepts need to be published only once and their content can be changed. So, you can reuse your intercept multiple times.

Currently, you can add only one survey to the intercept. The survey must be open and have the **Generate Link** distribution type. If a survey is closed or deleted, it does not appear in the intercept. If there is no survey in the intercept, the intercept does not appear.

The **My Intercepts** page provides you information on each intercept you created. You can sort intercepts by clicking the column heading. To change the width of a column, drag its edge. At the bottom of the **My Intercepts** page, you can adjust the number of intercepts that displays on one page. The default number of intercepts per page is 10; however, you can select up to 100 intercepts to display on the **My Intercepts** page.

To manage all intercepts, select the check box in the upper-left corner of the **My Intercepts** page.

The following columns are available on the **My Intercepts** page.

- **Intercept Title** – Name of an intercept. Click the intercept name to edit the intercept.
- **Last Modified** – Last time when you made changes to the intercept.
- **Open Surveys** – Name of the survey assigned to the intercept. The survey name link directs you to the survey designer. The edit link directs you to the **Surveys** tab of the intercept designer.
- **Design** – Click the icon to go to the **Message** tab of the intercept designer.
- **View Code Snippets** – Click the icon to go to the **Code Snippet** tab of the intercept designer.

Create a new intercept

Procedure

1. On the **My Intercepts** page, click the **New** button. The **Name Your Intercept** dialog box opens.
2. Enter the name of the intercept in the **Intercept Name** text box.
3. Click **OK**.

Edit an intercept

Procedure

1. On the **My Intercepts** page, click the intercept name you want to edit. The intercept designer opens.
2. Make the required changes. Your edits are saved automatically.

Duplicate an intercept

Procedure

1. On the **My Intercepts** page, select a check box next to the survey you want to copy.
2. On the toolbar, click the **Duplicate** button. The **Duplicate an Intercept** dialog box opens.

> Edit the intercept name if required.

3. Click **OK**.

Rename an intercept

Procedure

1. On the **My Intercepts** page, select a check box next to the survey you want to rename.
2. On the toolbar, click the **Rename** button. The **Rename** dialog box opens.
3. Edit the name of the intercept.
4. Click **OK**.

Delete an intercept

Procedure

1. On the **My Intercepts** page, select a check box next to the survey you want to remove.
2. On the toolbar, click the **Delete** button. The confirmation dialog box opens.
3. Click **Delete**.

Creating an invitation for the intercept

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Message** side tab in the left pane.

You can create and format an invitation message asking your website visitors to take a survey. The invitation appears directly on your Web site. The Web site visitors can either accept the invitation and take a survey or decline the invitation. If invitation is accepted, a survey opens in a new browser window.

In the left pane, you can view the language of your invitation under **Base Language**. In the right pane, you can preview your current invitation appearance under **Intercept**.

The sections below include information on how to compose your invitation:

- Title, page 208
- Message, page 208
- Confirm Button, page 209
- Cancel Button, page 209
- Preview, page 209

Title

Add text to your invitation title in the "Title" field. The default title is blank. You can format text by using the editing toolbar. The following options are available:

- Font name
- Font size
- Bold
- Italic
- Underline
- Alignment

The invitation title is shown by default. You can hide the title by selecting the "Hide Title Bar" check box.

Message

Add text to your invitation message in the "Message" text box. The default message is "Please take a few moments to answer a brief survey." You can format text by using the editing toolbar. The following options are available:

- Font name
- Font size
- Bold
- Italic
- Underline
- Foreground color

- Background color
- Alignment

Confirm Button

Add text to the confirm button in the "Confirm Button" field. By clicking this button, users accept the invitation to take your survey. The default button text is "Take survey!"

> You can format text by using the editing toolbar.

Cancel Button

Add text to the cancel button in the "Cancel Button" field. By clicking this button, users decline the invitation to take your survey. The default button text is "No Thanks."

> You can format text by using the editing toolbar.

Preview

In the right pane, you can preview the changes you made to the invitation at once.

Formatting the intercept

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Formatting** tab in the left pane.

You can customize your intercept theme so that the style and brand match your website and survey. You can format the title area, content area, confirm button, and cancel button. The intercept preview is updated immediately after any changes.

The sections below include information on how to change the appearance of your intercept:

- Title Area, page 210
- Content Area, page 210
- Confirm and Cancel Buttons, page 211

Title Area

In the **Title Area** section, you can change the color in the title area of the intercept, create a gradient, and select the close icon for the title.

- **Text Color** – Select the color of the title text from the drop-down list. You can select from a range of colors in the Web Palette, RGB (Red, Green, and Blue) Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value). If you know the hexadecimal value of a color, you can enter it in the provided field.
- **Background Color1** – Select the top background color of the title area from the drop-down list.

> You can create a gradient in the title area using the "Background Color1" option together with the "Background Color2" option.

- **Background Color2** – Select the bottom background color of the title area from the drop-down list. The "Background Color2" option has additional button to clear the color selection. If a color is selected, the title area is a gradient. If the "Transparent color" button is selected, the title area is a solid color defined in the "Background Color1" field.
- **Border Color** – Select the border color of the title area from the drop-down list.
- **Close Icon** – Select the close icon that appears on the intercept title from the drop-down list. You can select from five different close icons. The default icon is the second icon in the list.

Content Area

In the **Content Area** section, you can change the color in the content area of the intercept and insert the background image. You can add an image by uploading it or providing a link to its location.

- **Background Color** – Select the background color of the content area from the drop-down list.
- **Border Color** – Select the border color of the content area from the drop-down list.
- **Background Image** – Click the **Upload Image** link to select an image for the content background. If you want to enter a URL to the image location, click the **Provide URL** link.

Confirm and Cancel Buttons

In the **Confirm Button** and **Cancel Button** sections, you can change the buttons color of the intercept.

- **Text Color** – Select the color of the button text from the drop-down list.
- **Background Color** – Select the background color of the button from the drop-down list.
- **Border Color** – Select the border color of the button from the drop-down list.

Upload the background image

Procedure

1. Open the **Formatting** tab in the intercept designer.
2. Click the **Upload Image** link next to the "Background Image" field. The **Picture** dialog box opens.
3. Select the image you want to add.

> If no images are available in the **Picture** dialog box, click the **Upload** button to upload one or multiple images.

4. Click **Insert**. The image appears on the intercept background.

How to provide URL to image

Procedure

1. Open the **Formatting** tab in the intercept designer.
2. Click the **Provide URL** link next to the "Background Image" field. An empty field appears for you to add a URL.
3. In the field, enter a URL to the image you want to add.
4. Click the **Save** link.

> Hover over an abbreviated URL to view the full URL in a tooltip.

How to delete the background image

Procedure

1. Open the **Formatting** tab in the intercept designer.
2. Click the **Remove** link next to the "Background Image" field. The background image is deleted.

Map a single survey

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Survey** tab in the left pane.

You can select a survey for your intercept. Currently, you can add only one survey to the intercept. The survey must be in the Open status and have the **Generate Link** distribution type. You can add and remove the surveys in your intercept and do not need to republish the intercept in such case. The intercept code snippet does not need to be updated.

Additionally, you can preview the survey selected for the intercept on the **Survey** tab. Preview helps you to ensure that you selected the correct survey for your intercept. All survey pages are listed at one page for your convenience.

A web administrator does not have access to the **Survey** tab in the intercept designer. If a user does not have access to any surveys, the **Survey** tab is hidden.

When you are ready to publish your intercept, you can click the code snippet link at the top of the page to go to the **Code Snippet** tab.

If you close this message, it is hidden on all tabs. You can restore all hidden messages on the **My Account** tab. Click the **Reset Hidden Help Messages** link to restore all hidden messages.

Add a survey to the intercept

Procedure

1. Open the **Survey** tab in the intercept designer.
2. Click the **Add Survey** button. The **Add Survey** dialog box opens.
3. In the left pane, select the folder, which contains the survey you want to add. The list with all open surveys in this folder appears.
4. In the right pane, select the survey you want to add.

You can add only one survey to the intercept. The survey must be open.

5. Click **Add**.

Delete a survey from the intercept

Procedure

1. Open the **Survey** tab in the intercept designer.
2. Select the survey added to the intercept.
3. Click the **Remove** button. The confirmation dialog box opens.
4. Click **Remove**.

Rename an intercept

Procedure

1. Open the **Survey** tab in the intercept designer.
2. Click the **Edit** link next to the intercept name.
3. Enter a new name for your intercept.
4. Click **Save**.

Properties tab

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Properties** tab in the left pane.

You can control how often the intercept is shown to the website visitors and select what event triggers the intercept. The same Web site visitor is invited only once by an intercept. The browser's cookies are used to ensure that a visitor has already been intercepted. The intercept appears again in a 30-day period.

The "Frequency" property of an intercept is a probability that the Web site visitor is intercepted. You can specify the frequency in percentage of times (0-100%) the intercept appears. For example, a frequency of 40% means that a Web site visitor has a 40% chance of being intercepted when viewing a Web page on your site.

You can select from the following events to trigger the intercept:

- User visits page, page 214
- Customized Trigger (Advanced), page 214

The intercept appears in three seconds after it is triggered.

User visits page

Activate the "User visits page" option to ask your website visitors for feedback immediately when they first view a Web page. The invitation appears asking a visitor to take a survey. The Web site visitor can either accept or decline the invitation. If the invitation is accepted, the survey appears at once in a new browser window over the main window.

Customized Trigger (Advanced)

Activate the "Customized Trigger (Advanced)" option to ask your Web site visitors for feedback immediately when they click somewhere on the Web page so that you can best control where surveys are deployed. The list of actions includes clicking a link, button, or image. The invitation appears asking a visitor to take a survey. The website visitor can either accept or decline the invitation. If the invitation is accepted, the survey appears at once in a new browser window over the main window.

For more information on how to configure the customized trigger, see Code Snippet tab, page 215.

Code Snippet tab

Navigation

Design & Collect tab > **Intercepts** tab > **My Intercepts** page > create a new intercept or open an existing intercept > click the intercept name to open the intercept designer > **Code Snippet** tab in the left pane.

You can copy the JavaScript code snippet of your intercept. Next, you can insert the copied code into the HTML of the Web page where you want the intercept to appear. Visitors will see the intercept according to the criteria you set on the **Properties** tab.

All of the code you need for your intercept to work is available in the field under **Code Snippet**. The code snippet is generated automatically for you. Insert the entire HTML code snippet into the web page and do not edit it, otherwise your intercept may perform incorrectly.

> To keep you from changing the code by accident, the code snippet is not editable. You can only copy it.

Customized Trigger (Advanced)

If you select the **Customized Trigger (Advanced)** option on the **Properties** tab, the **Customized Trigger (Advanced)** section appears on the **Code Snippet** page.

To create a customized trigger that launches an intercept, use the provided JavaScript function in your custom Web site logic. Calling this function in your website initiates the process of showing the intercept according to the frequency set on the Properties tab.

So, in addition to the code snippet of your intercept (see #1 on image), copy and paste the code snippet of the customized trigger (see #2 on image) into your website. Add the code snippet of the trigger to the HTML element (link, button, or image) that is associated with the trigger. See example below.

```
<html>
<head>

<script type="text/javascript" src="http://co.vovicidev.com/CurrentDev_
   MSSQL/Intercept.ashx?i=7FDA9ED14D9C25A1"></script>

</head>
<body>

<input onclick=vcInterceptApi['vcIntercept7FDA9ED14D9C25A1'].displayIntercept();
   type="button" value="click me">
</body>
</html>
```

> You can place multiple intercepts on the same web page.

Testing Your Intercept

After adding the copied code snippet of your intercept to the web page, the intercept is considered as published. You can test the intercept using information provided in the **Testing Your Intercept** section. Add the following text to the end of your web page's URL to test the intercept:

```
?trigger_intercept=1
```

If there is already a question mark "?" in the URL, add the following code instead:

```
&trigger_intercept=1
```

Passing URL Parameters

You can pipe URL values and preselect responses on the first survey page by using additional parameters separated by an ampersand in the code snippet.

URL piping is available for **Fill in the Blank**, **Short Answer**, and **Essay** questions only. Preselected responses are available for **Choose One** and **Choose One with Image** questions only.

- To pipe URL values:
  - In the **Preselected** field in survey designer, set the URL parameters for the needed question/topic, for example, %URL.first% (for details, see Piping URL Query, page 543).
  - In the code snippet, type the values for the specified parameters as follows:

    &first=Bob&last=Gates&zip=94102

Names of parameters are case sensitive.

- To set preselected responses:
  - In the code snippet, type the question heading with the needed choice number as follows: &Q1=3&Q2=1

Reporting on intercept surveys

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing survey > add your survey to the intercept and collect some responses > **Analyze** tab in the survey designer where you can view responses and create reports on your intercept survey results.

You can view responses and report on data collected from the intercept surveys in the same way as for the usual surveys. The process of designing a survey and analyzing the results does not change. Each survey has its own **Response Manager** table, and data is stored in the respective surveys. The intercept is just the channel for deploying your survey.

The following two columns connected with the web intercepts are added to **Response Manager**:

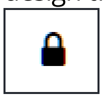
- **Response Source** – This column indicates whether a survey is taken via intercept or any other channel.
- **Referring URL** – This column indicates what Web page the user is on when the intercept is presented.

Currently, you can add to your web intercept the **Generate Link** surveys only.

Web Administrator role

Navigation

Administration tab > **Roles** tab > **Roles** page > **Web Administrator** role in the roles list.

A new predefined role – **Web Administrator** – is added to the application. A web administrator can design the web intercepts and generate the code for them. The **Web Administrator** role is locked  from any edits. You can create a custom role based on the **Web Administrator** role by copying and editing it.

A web administrator can access all intercepts across the workgroup and has permission to view, create, edit, and delete the intercepts. These permissions are assigned by the "all or nothing" rule. See images below.

When you select the "View All Intercepts" check box for a custom role, all the check boxes in the **Web Intercept Administration** section are selected automatically.

By default, the web intercept building tool is available for web administrators only. Survey authors can also be granted access to the intercept building tool but with the permission to manage only their own surveys.

A web administrator does not have access to the **Survey** tab in the intercept designer. If a user does not have access to any surveys, the **Survey** tab is hidden.

Chapter 5

Designing Your Survey Overview

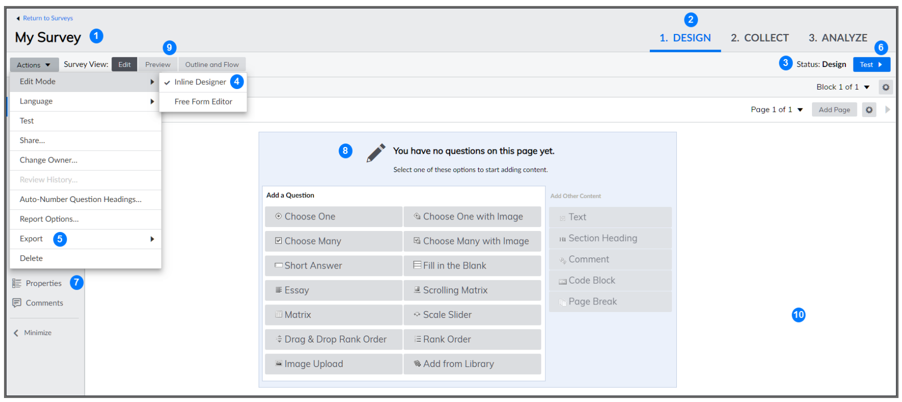
Topics

Survey designer overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option.

After you create a survey (using any of the options provided further in this chapter), the survey designer page is displayed, where you can add and edit your survey questions, configure survey logic and design options, export, and test your survey.
This topic provides a brief overview of the features available on a blank survey page and basic instructions for designing a survey from scratch. For details on adding questions, see Choose One questions, page 247 as an example.



The Design tab of a new survey

1 Edit the title of a survey.

> To edit your survey title, click the default survey name, type a new name, and then press **Enter** to save the changes.

2 Create or edit a survey on the **Design** tab.

3 View the status of a survey.

4 Export a survey as a Microsoft Word (.doc), Adobe Acrobat (.pdf), EFM Enterprise (.que) file, or Mobile Survey.

5 Test a survey.

6 Change the survey properties, style, and more.

7 Add a question to a survey, and then edit the question text, answers, appearance, validation, and logic properties.

8 View a survey in the **Edit**, **Preview**, or **Outline and Flow** mode.

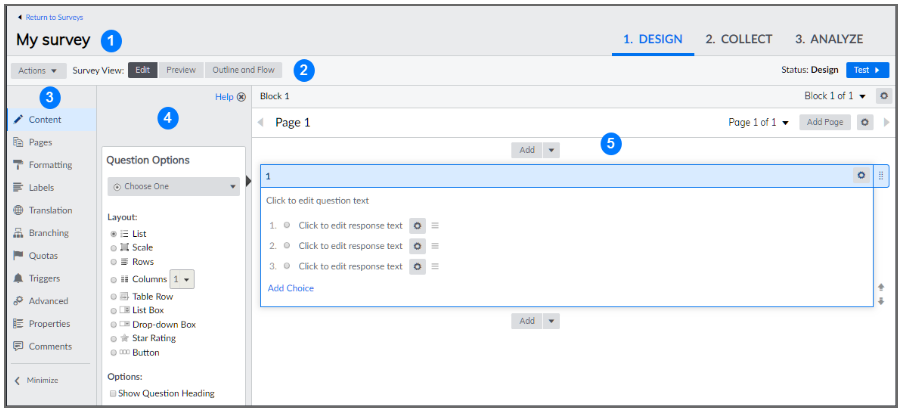
9 View the added questions and answers here.

Survey design framework

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view.

The **Design** view is divided into the following areas. See image and description below.



Areas of the Design tab

1 Header, page 227

2 Toolbar, page 227

3 Panel Buttons, page 227

4 Side Panel, page 228

5 Content, page 228

Header

The **Header** area includes the title of the survey you are designing, the **Design**, **Collect**, and **Analyze** tabs. The **Header** area has a fixed width but a liquid height, which means the **Header** area expands vertically to fit longer titles.

Toolbar

The **Toolbar** area has the same properties as the **Header** area. It includes the **Actions** menu, the **Survey View** toggle keys, the **Status** indicator, and the **Test** button. The toolbar has a fixed height but a liquid width.

Panel Buttons

The **Panel Buttons** area of the **Design** tab contains a number of side tabs, such as **Content**, **Pages**, **Formatting**, **Labels**, **Translation**, **Branching**, **Advanced**, **Properties**, and **Comments**. This area has a fixed height, but a liquid width. The width of this area depends on whether you hide or show button titles.

Side Panel

The **Side Panel** area includes survey options that vary depending on the survey content. This area has a liquid height and fixed width.

Content

The **Content** area of the **Design** tab includes the questions that you have chosen for your survey. In addition, you can edit titles of pages and blocks, manage your pages and blocks using the block and page menus, and navigate between pages and blocks using the menus to the left of the block or page menus. This area has a liquid height and width.

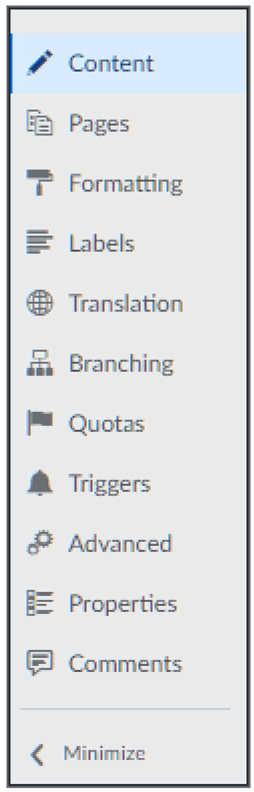
Designer side panels

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design fromScratch** option > **Design** view.

You can use the side panels to navigate within feature sets in the **Design** view. You can select nine panels, **Content**, **Pages**, **Formatting**, **Labels**, **Translation**, **Branching**, **Advanced**, **Properties**, and **Comments**, to edit your survey and its settings.

You can minimize and expand the side panel section. Click the **Minimize** link to hide the panel names. You can move your pointer over the side panel icon to see its tooltip.



The Designer side panels

In-survey pagination

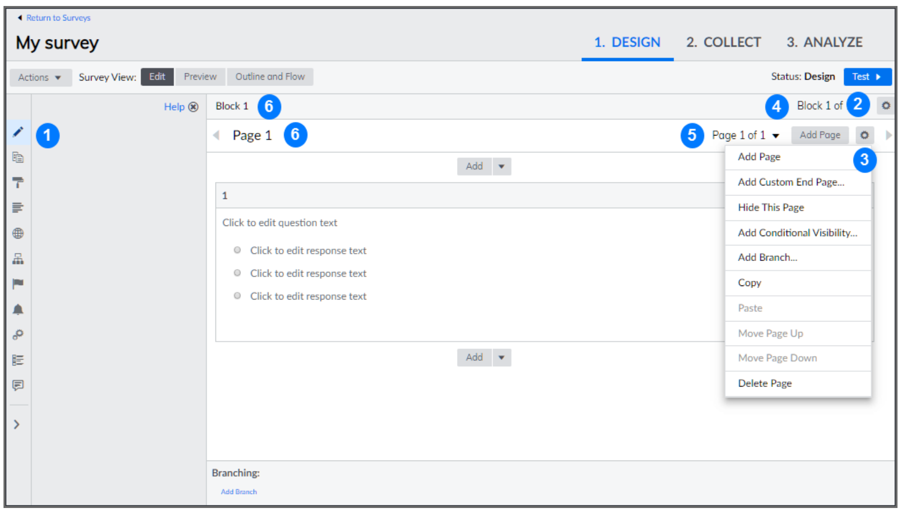
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design fromScratch** option > **Design** view.

By using the in-survey pagination controls, you can:

- Quickly navigate to any block or page within your survey.
- Manage your blocks and pages using the corresponding drop-down menus on the right side of the survey content area header.
- View the total number of blocks and pages in your survey and the number of your current block and page.
- Edit the name of a block or page.

The topic describes the behavior of the in-survey pagination controls that are available in the header of the survey content area.



The in-survey pagination controls

1 Previous Page and Next Page arrows, page 231

2 Block drop-down menu, page 231

3 Page drop-down menu, page 231

4 Block number indicator, page 232

5 Page number indicator, page 232

6 Block name and page name, page 232

Previous Page and Next Page arrows

The **Previous Page** and **Next Page** arrows provide an easy navigation to the previous and next pages within your survey. Click the right arrow to navigate to the next page and the left arrow to navigate to the previous page.

> The arrows become active only if there are pages after or before the current page.

Block drop-down menu

The block drop-down menu includes the following options:

- **Add Block** – Add a new block to your survey. For more information, see Add block, page 390.
- **Hide This Block** – Hide the current block from the survey respondents. After clicking the option, the visibility status bar is displayed below the block name. To make the block visible again, click the delete icon on the rightmost of the visibility status bar.

> If the survey distribution method is **Require a Passcode**, the **Hide This Block** option is unavailable for the first block in the survey.

- **Add Conditional Visibility** – Add or edit the block visibility criteria. For more information, see Add conditional visibility for block, page 506.
- **Add Branch** – Add branching and logic rules to your survey. For more information, see Adding Branching Criteria, page 442.
- **Add Page Rotation** – Make pages in the current block appear in a rotated order in your survey. For more information, see Blocks and Page Randomization, page 403.
- **Add Page Randomization** – Make pages in the current block appear in a randomized order in your survey. For more information, see Blocks and Page Randomization, page 403.
- **Copy** – Copy the current block. For more information, see Copy and paste block, page 393.
- **Paste** – Paste the previously copied block into your survey. The block is added after the current block. For more information, see Copy and paste block, page 393.
- **Move Block Up** – Move the current block one position towards the beginning of the survey.
- **Move Block Down** – Move the current block one position towards the end of the survey.

> The **Move Block Up** option is unavailable if the current block is in the first position of the survey. Similarly, the **Move Block Down** option is unavailable if the current block is in the last position of the survey.

- **Delete Block** – Delete the current block from the survey. For more information, see Delete block, page 392.

Page drop-down menu

The page drop-down menu includes the following options:

- **Add Page** – Add a new page to your survey.

- **Add Custom End Page** – Create a custom end page in your survey. When saved, this custom end page appears on the Pages side tab of the Design tab. For more information, see End Pages Pagination Panel, page 396.
- **Hide This Page** – Hide the current page from the survey respondents. After clicking the option, the corresponding visibility status bar is displayed under the page name. To make the page visible again, click the delete icon on the rightmost of the visibility status bar.
- **Add Conditional Visibility** – Add or edit the page visibility criteria. For more information, see Page Conditional Visibility, page 502.
- **Add Branch** – Add branching and logic rules to your survey. For more information, see Adding Branching Criteria, page 442.
- **Copy** – Copy the current page. For more information, see Copying and pasting pages between surveys, page 388.
- **Paste** – Paste the previously copied page into your survey. The page is pasted after the current page. For more information, see Copying and pasting pages, page 387.
- **Move Page Up** – Move the current page one position towards the start of the survey.
- **Move Page Down** – Move the current page one position towards the end of the survey.

> The **Move Page Up** option is unavailable if the current block is in the first position of the survey. Similarly, the **Move Page Down** option is unavailable if the current block is in the last position of the survey.

- **Delete Page** – Use to delete the current page from the survey.

Block number indicator

The block number indicator shows the number of a current block and the total number of blocks in your survey, for example, Block 4 of 4.

You can navigate to any block within your survey using the block navigation drop-down menu. To expand the menu, click the arrow next to the block number indicator. Clicking the block name in the menu navigates you to the first page of the selected block.

Page number indicator

The page number indicator shows the number of a current page and the total number of pages in your survey, for example, Page 4 of 4.

You can navigate to any page within your survey using the page navigation drop-down menu. To expand the menu, click the arrow next to the page number indicator.

Block name and page name

By default, block and page names contain the block and page numbers. If needed, you can change the block and page names. This option is typically used by the survey author to name blocks and pages in a descriptive way to easily locate a particular block or page within the survey.

For example, if your survey is about cities, you might name the pages as follows:

- Geographical position (for Page 1)
- Rank planned visit (for Page 2)
- Next planned visit (for Page 3)

This feature is helpful if your survey has multiple blocks and pages. After you have renamed the block or page, their new names appear in the header of the survey content area. Instead of Block 1, Block 2, Page 1, and Page 2, the descriptive names for each block and page are displayed now, which can help you quickly find a question you need.

If there is an empty block in your survey, you can still view its placeholder in survey designer and add pages to it by using the **Add Page** button.

Edit the page name

1. In the survey designer, click the page name. The page name text field becomes editable.
2. Edit the page name, and then press **Enter** to save the changes.

Edit the block name

1. In the survey designer, click the block name. The block name text field becomes editable.
2. Edit the block name, and then press **Enter** to save the changes.

Navigating text entries

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Add** menu.

You can navigate question headings, question text, and responses using the Tab key or the Tab + Shift keys. This functionality works within one page. To activate the navigation, click any text field in the question. After you press the Tab key or the Tab + Shift keys, the text in the active text field becomes highlighted.

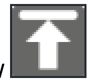
- **Tab** key – Press to navigate to the next text field.
- **Shift** + **Tab** keys – Press to return to the previous text field.

The Tab key does not insert the text as the Enter key; it only navigates to the next text field.

Scrolling to the top of the survey page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > scroll down the survey page > **Return to the top of the page** arrow.

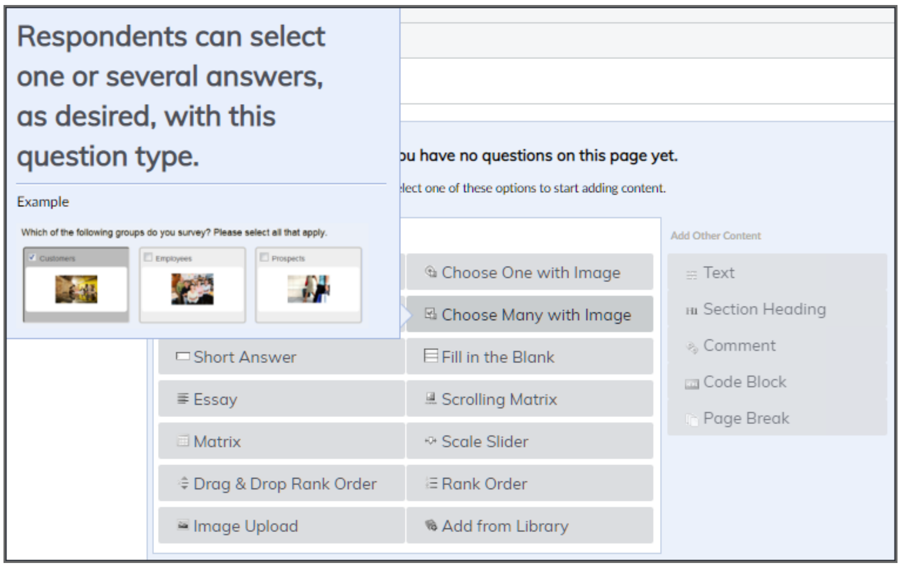
When you scroll down the survey page and survey designer toolbar disappears from your view, the **Return to the top of the page** arrow  appears in the lower-right corner of the page. You can click the arrow to return to the top of the page immediately. Once the toolbar comes in your view, the **Return to the top of the page** arrow disappears. If you scroll up to the survey toolbar manually, the **Return to the top of the page** arrow disappears too.

Fly-outs

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Add a Question** menu > move your pointer over the question name to view a fly-out for this question.

When you add a new question to your survey, you can view a fly-out for this question. The fly-out includes the question description and its example. Hover over the question name for a couple of seconds and the fly-out for this question type appears.



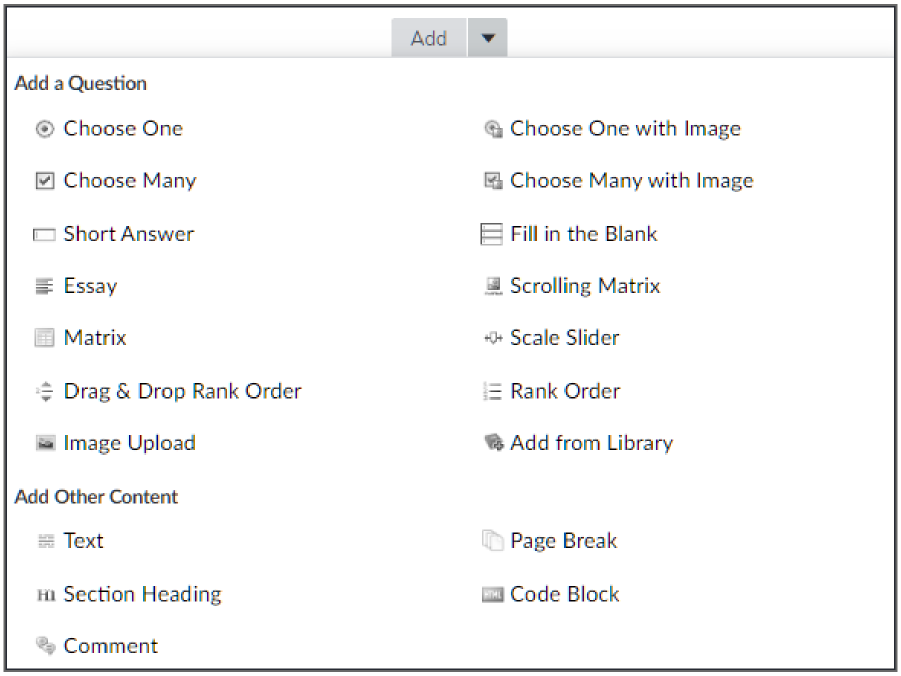
The fly-out for Choose Many with Image

Add a question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Add** menu.

In the **Design** view of the survey designer, you can add a question or other content to your survey by using the **Add** button or the **Add** menu. If you click the **Add** button, a panel opens from which you can add any type of the question. If you click the arrow next to the **Add** button, the **Add** menu opens.



The Add menu

The **Add** button and the **Add** menu are available in the content pane if your survey contains at least one question or other survey item. If your survey is blank, you will see a panel for adding a question or other content instead of the **Add** button and **Add** menu.

Procedure

1. In the **Design** view of the survey designer, click the down arrow next to the **Add** button. The **Add** drop-down menu opens with all question types and other survey items available.
2. Click the appropriate question type.
3. Enter your question text.
4. Enter your question choices.

Changing question type

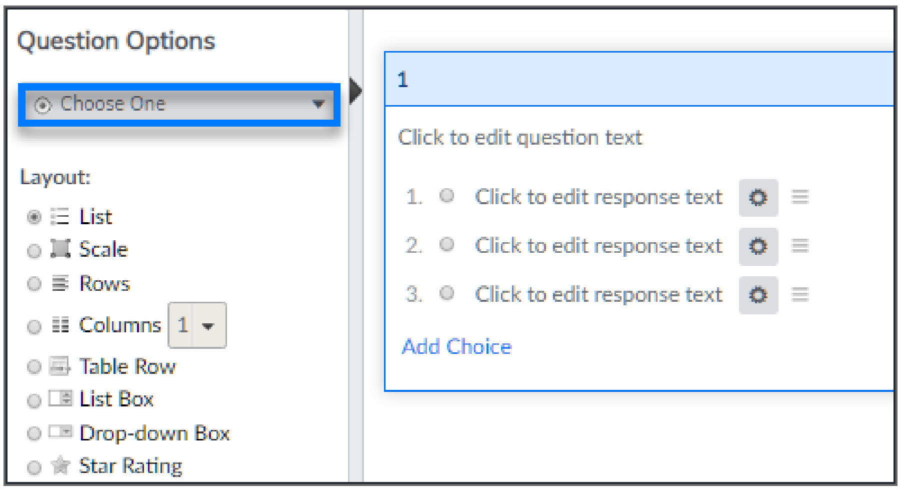
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > click any question > **Question Options** panel.

You can easily switch from one question type to another without having to delete the old question and create a new one.

Changing question type functionality is available only for unpublished surveys.

In the **Question Options** panel, you can use a drop-down list to switch between different question types. You cannot switch to other content types, such as text, section heading, or code block.



The Question Options panel

When you change the question type, the question heading, question text, and choice options remain the same. For example:

- When you switch from a **Choose One** question type to **Matrix**, the choice options remain.
- When you switch from a **Matrix** question to a **Choose One** question, the topics are dropped.
- When you switch from a **Matrix** question with multiple sides to a **Choose One** question, the sides are dropped.
- When you switch from a **Matrix** question with multiple sides to a **Rank Order** question, the sides are converted to the topic options.
- When you convert a **Choose One** or **Matrix** question to an **Essay** question, all the choices and topics are dropped. If you switch back to **Choose One** or **Matrix**, the choices and topics are back.

In **Test** mode only, if you change the question type in the **Design** view and apply the changes to the survey, the validation is performed on a new question type. If it is not valid for the report element, in which it is used, the message appears in a report that the base question type for this report element is changed, and the report element is no longer applicable.

Change question type with images

Any images as part of questions with the **Add Image** button are carried over to other questions with the **Add Image** button. The images added as a part of the question text remain within different question types.

Change common properties

When you switch from **Choose One** to **Choose Many** questions (and vice versa), the following layout options remain the same:

- List
- Scale
- Rows
- Columns
- Table Rows

The rest of the layout options are set to the **List** default value.

The **Conditional Visibility** and **Destination** values are carried over when you switch between different question types.

Switching between all questions carries over:

- Show Question Heading
- Answer Required

Any **Branching** or **Conditional Visibility** in the survey, which uses choices or topics from a question, is broken when that question is changed.

Question headings

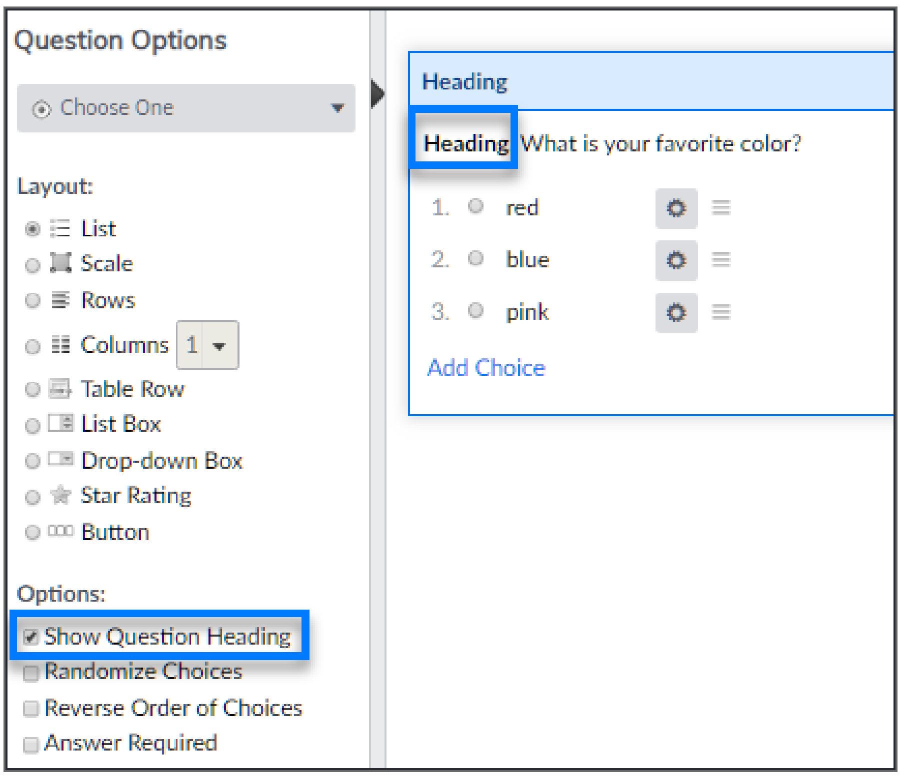
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Add** menu.

You can use question headings to make data mapping easier when typing in shortened versions of the questions. Also, you can use headings to number the questions if the **Show Question Heading** check box is selected.

By default, the questions are enumerated with the next incremental number. You can edit the question heading by clicking the number above the question text.

You can also show or hide the question heading using the **Show Question Heading** check box under **Question Options**.



The Show Question Heading option

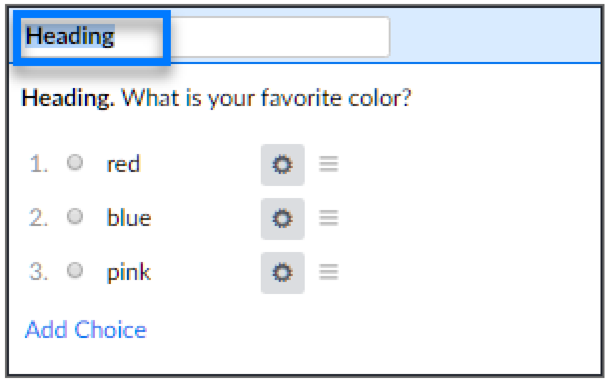
By default, the **Show Question Heading** check box is clear, the question heading is not shown, and only the question text appears in the survey.

Procedure

1 In the **Design** view, add a question to your survey.

2 Click the question heading, which is above the question text.

3 Edit the question heading. All your changes are saved automatically.



Editing the question heading

Auto number question headings

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Actions** menu on the toolbar > **Auto-Number Question Headings**.

You can change the automatic numbering of your survey question headings.

> The auto-numbering of a survey question heading cannot be turned off. If needed, you can specify your custom question heading by typing it in the question heading text box. The default numbering format will be replaced with the custom one.

> To avoid entering the insecure code in the **Auto-Number Question Headings** dialog box, on the **General Setup** page, select the **Automatically remove untrusted code from survey designer** check box, and ensure that the **Edit Code Blocks** permission is cleared. For more information, see General Setup, page 1406.

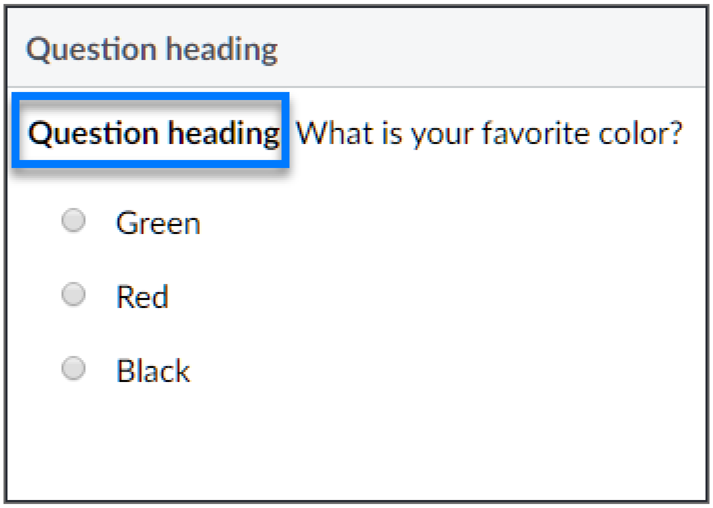
Procedure

1. On the **My Surveys** page, open the needed survey.
2. On the **Actions** menu, click **Auto-Number Question Headings**.
3. In the **Auto-Number Question Headings** dialog box, do the following:
   a. Select the numbering format:
      - **Number Sequentially** (default) – Numbers the questions in the ascending order starting with the first question on the page. The question number appears in the following format: Question Number (1, 2, 3).
      - **Number by Page** – Numbers the questions based on the page number, where the question number resets at the start of each page. The question number appears in the following format: Page Number + Question Number (1.1, 1.2, 2.1).
      - **Number by Block** – Numbers the questions based on the block number, where the question number resets at the start of each block. The question number appears in the following format: Block Number + Question Number (1.1, 1.2, 2.1).

> If a block contains a child block, the number by block appears in the following format: Parent Block Number + Child Block Number + Question Number (1.1.1, 1.1.2, 2.1.1), where the question number resets at the start of each child block.

      - **Number by Internal ID** — Numbers the questions based on the database heading that matches the **ID** column on the **Report Options** page. The question number appears in the following format: DB identifier (Q1, Q4, Q5).

   b. To display the question heading in a survey, select **Show Question Heading**.



The question heading

c. To include hidden questions into auto-numbering, select **Include Hidden Questions**. If this option is not selected, any question with visibility set to **Hidden** will be excluded from auto-numbering, and instead it will be labeled separately in alphabetic form going from A-Z, then AA-AZ, BA-BZ, and so on.

d. In the **Prefix** text box, specify a prefix for your question headings if needed. The prefix can contain more than one word but without spaces. The question number appears in the following format: Prefix + Question Number (Option1, Option2, Option3).

4 Click **Apply**.

Change text in an open survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Add** menu > add questions to the survey > **Collect** view > open the survey.

After a survey is opened, you can edit it to correct typos. You can edit the question and choice text and change images. You cannot add, delete, or move choices.

When the text is changed, the translations are marked as out of date and need to be updated too.

The modification of the previously published questions might impact the collected results.

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. In the **Design** view of the survey designer, edit your survey as required.
3. Click the **Apply** button at the top of the page to apply your changes to the survey.

Your changes are posted to the same survey URL that is already available.

Bulk Changing Survey Owner

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Actions** menu > **Change Owner** option.

The group and survey administrators can bulk reassign surveys (including surveys owned by the other workgroup members) to a new owner.

When the survey owner is changed, the survey moves automatically to the new owner's folder on the **My Surveys** page. A new survey owner receives the corresponding email notification. Only one email is sent regardless of the number of surveys assigned to a new owner. For example, if you reassign 50 surveys at once, the new owner receives only one email; if you reassign 25 surveys and then another 25, two email notifications are sent to the new owner.

The reassignment of the survey is recorded as one transactional event per one survey, not for all surveys.

The **Change Owner** option is disabled for the surveys in **Recycle Bin** and for the surveys submitted for review.

Bulk change the survey owner

Procedure

1. Go to the **My Surveys** page, and then select the check boxes next to the surveys that you want to reassign.
2. On the **Actions** menu on the toolbar, click **Change Owner**.
3. In the **Bulk Assign Surveys to New Owner** dialog box, the current survey owner is outlined in gray.
4. Select the user that you want to be the new owner, and then click **OK**.

Report Options page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Actions** menu on the toolbar > **Report Options**.

You can view and edit report, export, and coded values for the questions on one page to more efficiently define these values for every question in your survey.

> To avoid entering the insecure code on the **Report Options** page, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box, and ensure that the **Edit Code Blocks** permission is cleared. For more information, see General Setup, page 1406.

The **Report Options** grid includes the following columns:

- **Display Heading** – Page title and question heading.

> You can collapse and expand the page title row if needed. It is expanded by default.

- **ID** – Question, choice, column, or topic ID used throughout the survey.
- **Question** – Question, choice, column, or topic text.
- **Report Value** – Text box for defining or editing the report value
- **Export Value** – Text box for defining or editing the export value.
- **Coded Value** – Drop-down menu with the applicable coded value options. Adding a coded value to a choice excludes it from the **Coded Value** menu for the previous choice.

> You can only add coded values starting from the end of the choice list.

You can filter the information displayed in the **Report Options** grid by selecting or clearing the following check boxes:

- **Display all questions** – Select to view all survey questions, including the ones that do not support report, export, or coded values.

> When accessing the **Report Options** page for the first time, the **Display all questions** check box is cleared by default. If you change the selection, it is saved for all your surveys.

- **Internal** – Select to view the **Display Heading** and **ID** columns.
- **Exporting** – Select to view the **Export Value** column.
- **EFM Analysis** – Select to view the **Report Value** and **Coded Value** columns.

> When accessing the **Report Options** page for the first time, the **Internal**, **Exporting**, and **EFM Analysis** check boxes are selected by default. If you change the selection, it is saved for all your surveys.

To get back to your survey designer, click the **Return to Survey Designer** button.

Choose One questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Choose One** option.

With the **Choose One** question type, your survey participants can select only one answer for this question. This question includes the question text followed by the response options.

You can customize the appearance of the **Choose One** question and add the validation and logic properties by using the **Question Options** and **Response Options** panels.

Adding and customizing question text

Type the text of your **Choose One** question in the text field, and then format the text with the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing choice text

After adding your question text, you need to add the choice text. By default, three choices appear. You can add, delete, or move the choices by using the options menu to the right of the individual choice. To format the choice text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

You can further customize the response choices of the **Choose One** question by using the **Response Options** panel in the left pane. The **Response Options** panel appears when you click the choice.

> For more information on the question and choice properties of the **Choose One** question, see List of property indicators, page 278 and Response options, page 330.

Create a Choose One question

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** view > **Content** tab, click **Choose One**.
   The **Choose One** question is added to your survey.

If your survey contains at least one question or other content, you can add a **Choose One** question by clicking the **Add** button or the **Add** menu.

3 To change the question heading, click the question number.
The heading text field becomes editable.

4 Edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

By default, the question heading is hidden. You can select the **Show Question Heading** option in the **Question Options** section of your question to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes. You can customize your text and add images or media to your question by clicking the editing toolbar.

While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance (as appropriate), and add the validation and logic properties.

8 To edit the choice, click the appropriate choice text field. The choice text field becomes editable.

9 Edit the choice, and then press **Enter** to save the changes and switch to the next choice.

When you switch to another response choice, the changes you have made to the previous choice are saved automatically.

10 To add more choices, click the **Add Choice** link.
To cancel adding a new choice, press **Esc**.

11 To preview your survey and your **Choose One** question, on the survey designer toolbar, click the **Preview** button.

Choose Many questions

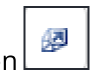
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Choose Many**.

With the **Choose Many** question type, your survey participants can select more than one answer for a question. This question includes the question text followed by the response options.

You can customize the appearance of your **Choose Many** question and add the validation and logic properties by using the **Question Options** and **Response Options** panels.

Adding and customizing question text

Type the text of your **Choose Many** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon  to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing choice text

After adding your question text, you need to add the choice text. By default, three choices appear. You can add, delete, or move the choices by clicking the menu next to each choice. To format the choice text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon  to access the expanded editor, which provides additional editing options.

You can further customize the choices of the **Choose Many** question by using the **Response Options** panel, which appears when you click the choice.

> For more information on the question and choice properties of the **Choose Many** question, see Choose Many Question Properties, page 285 and Response options, page 330.

Create a Choose Many question

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** tab > **Content** side tab, click **Choose Many**.
   The **Choose Many** question is added to your survey.

If your survey contains at least one question or other content, you can add a **Choose Many** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to change the question heading.
The heading text field becomes editable.

4 Edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

By default, the question heading is hidden. You can select the **ShowQuestion Heading** option in the **Question Options** section of your question to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance, and add the validation and logic properties.

8 To edit the choice, click in the appropriate choice text field. The choice text field becomes editable.

9 Edit the choice, and then press **Enter** to save the changes.

When you switch to another response choice, the changes you have made to the previous choice are saved automatically.

10 To add more choices, click the **Add Choice** link.
To cancel adding a new choice, press **Esc**.

11 To preview your survey and your **Choose Many** question, on the survey designer toolbar, click the **Preview** button.

Create a Short Answer question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Short Answer** option.

You can create a **Short Answer** question to collect short answer responses from your participants. The **Short Answer** question is an open-ended question that includes the question text followed by a single text field where participants can enter their responses.

> You cannot add any other text fields to a **Short Answer** question.

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** tab > **Content** tab, click the **Short Answer** button.

> To add a **Short Answer** question to an existing survey with questions, select it from the **Add** menu.

3 Click the question number to change the question heading.
The heading text field becomes editable.

4 Edit the question heading, and then press **Enter** to save the changes.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** option in the **Question Options** section of your question to make the question heading visible to the respondents.

5 Click the question text field to enter the question text.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
To cancel the changes, press **Esc**.

> You can customize your text by using the editing toolbar. While editing the question text, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

8 To preview your survey and your **Short Answer** question, on the survey designer toolbar, click the **Preview** button.

Essay questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Essay**.

With the **Essay** question type, you can collect responses from your participants in a free form. The **Essay** question is an open-ended question type. Survey participants can answer your question with their own text.

Adding and customizing question text

Type the text of your **Essay** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

On the **Question Options** panel of your **Essay** question, you can show or hide the question heading or the entire question. You can also set the validation and logic properties for your **Essay** question. For example, you can require participants to answer your question.

> You can add an **Essay** question to the side of the **Matrix** question.

Create an Essay Question

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** view > **Content** tab, click **Essay**.
   The **Essay** question is added to your survey.

> If your survey contains at least one question or other content, you can add an **Essay** question by clicking the **Add** button or the **Add** menu.

3. Click the question number to edit the question heading.
   The heading text field becomes editable.
4. Edit the question heading. All your changes are saved automatically.
   To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

5. Click the question text field, and then type the question text. You can customize your text and add images or media to your question by using the editing toolbar.

> The editing toolbar appears when you edit your question. You can use the drag handle to move the mini toolbar.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

6 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

7 To preview your survey and your **Essay** question, on the survey designer toolbar, click the **Preview** button.

Matrix questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Matrix**.

The **Matrix** question is the closed-ended question type, where your participants can select only one or many answers. This question includes the rows and choices listed in a series on either side of a matrix. If you change the question type of a side, the question options and properties change correspondingly.

You can add the **Choose One**, **Choose Many, Short Answer,** and **Essay** questions to the sides of your **Matrix** question. If you change the question type of a side, the question options and properties change correspondingly. In addition, you can customize your question text, question appearance, and add validation and logic properties by using the **Question Options**, **Matrix Side Options**, **Rows Options**, and **Column Options** panels.

Adding and customizing question text

Type the text of your **Matrix** question in the text field and format the text using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing row text

After adding your question text, you need to add the row question heading. By default, three rows appear. Each row is numbered for your convenience. The row number is displayed in the **Edit** mode only. You can add, delete, or move the rows by clicking the menu next to each row.

To format the row text, use the editing toolbar that appears when you click the row field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

You can further customize the response rows of the **Matrix** question by using the **Rows Options** panel, which appears when you click the row.

> For more information about the question and rows properties of the **Matrix** question, see Drag & Drop Rank Order Question Properties, page 302 and Response options, page 330.

Adding and customizing sides of the Matrix question

You can customize the side of the **Matrix** question by using the **Matrix Side Options** panel, which appears when you click **Category Text** on the top of the **Matrix** question.

You can select the type of the matrix side by clicking the menu next to the side. You can also click the **Add Side** icon to add more sides to the **Matrix** question.

The following question types can be added to the **Matrix** question as a side:

- **Choose One** – With this closed-ended question type, your participants can only choose one answer.

> The **Matrix** side options for this question also include **Only Allow a Column to be Selected Once**.

- **Choose Many** – With this closed-ended question type, your participants can choose more than one answer.
- **Short Answer** – With this open-ended question type, your participants can answer with their own topic text. Additionally, you can require your participants to enter different input data, such as text, number, dates, ID & phone numbers, and postal codes.

> The **Matrix** side options for this question also include **Show Running Total and Allocation**.

- **Essay** – With this open-ended question type, your participants can answer with their own topic text.

When you add a new side to the **Matrix** question, the **Choose One** side is added by default. A new side is added to the right of the matrix. The multi-sided **Matrix** question is displayed as single-sided on small devices and if the screen size is too small to display the full question.

> The **Matrix** question with more than one side may not render ideally on assistive technology devices.

Adding and customizing column text

By default, three columns appear under single side. You can add, delete, or move the columns by clicking the menu next to each column. You can also add a new column by clicking the **Insert Column** icon next to the last column of a side.

To format the column text, use the editing toolbar that appears when you click the column field. You can also click the **More** icon to access the expanded editor, which provides additional editing options. You can further customize the columns of the **Matrix** question by using the **Column Options** panel. The **Column Options** panel appears when you click the column. When the side type is changed, the column options are changed accordingly.

> The columns are available for the **Choose One** and **Choose Many** sides only.

Create a Matrix Question with a Choose One Side

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** tab > **Content** side tab, click **Matrix**.
The **Matrix** question is added to your survey.

> If your survey contains at least one question or other content, you can add a **Matrix** question by clicking the **Add** button or the **Add** menu.

3 To change the question heading, click the question number, and then edit the question heading.
All your changes are saved automatically. To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

4 To edit the question text, click in the question text field, edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question, row, and column texts, you can use the drag handle to move the mini toolbar.

5 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

6 To edit the side text, click in the side text field on the top of the **Matrix** question, edit the side text, and then press **Enter** to save the changes.

> By default, the **Matrix** question has one side. You can add more sides by clicking the **Add Side** icon.

7 To edit the row heading or the row text, click in the corresponding text field, edit the row heading or the row text, and then press **Enter**.

8 To add more rows, click the **Add Row** link.
To cancel adding a new row, press **Esc**.

9 To edit the category text or the column text, click in the corresponding text field, edit the category text or the column text, and then press **Enter**.

> When you switch to another topic, the changes you have made to the previous topic are saved automatically.

10 To add more columns, click the **Insert Column** option on the menu to the left of the column.
To cancel adding a new column, press **Esc**.

11 To preview your survey and your **Matrix** question, on the survey designer toolbar, click the **Preview** button.

Drag & Drop Rank Order questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Drag & Drop Rank Order**.

With the **Drag & Drop Rank Order** question type, you can add image- or text-based answers to a question, and your survey participants can select an item on the left and drag it across the screen to rank it on the right.

This question type may not render ideally on assistive technology devices.

Adding and customizing question text

Type the text of your **Drag & Drop Rank Order** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options. On the **Question Options** panel, you can customize the appearance of your question and add the validation and logic properties.

If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing topic text and images

After adding your question text, you need to add the topic text and images. By default, three topics appear. You can add, delete, or move the topics by clicking the menu next to each topic. To format the topic text, use the editing toolbar that appears when you click the topic field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

When you add an image to the **Drag & Drop Rank Order** question, the image name appears to the right of the corresponding topic text. You can point to the image name to see the image preview in a tooltip. The maximum limit on the image name is set to 30 characters. If the image name contains more than 30 characters, it is abbreviated to display appropriately in the question. You can delete the image from your question by clicking the **Delete** icon to the right of the image name.

You must tie text to images. If you only insert the image, and the participant has JavaScript disabled, the questions will be blank. Additionally, if the participant is using a Web reader, there will be no label to read.

You can pipe responses along with images into the **Drag & Drop Rank Order** question. See Piping values in the Question and Response Text, page 531 for the steps on piping responses from one question into another one.

Create a Drag & Drop Rank Order question

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** tab > **Content** side tab, click **Drag & Drop Rank Order**.
The **Drag & Drop Rank Order** question is added to your survey.

> If your survey contains at least one question or other content, you can add an **Drag & Drop Rank Order** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to edit the question heading.
The heading text field becomes editable.

4 Edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

5 Click the question text field, and then type the question text. You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

6 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

7 Click the topic text field, and then type the topic text.

8 To add the image associated with the topic, click the **Add Image** button. The image manager opens.

9 Click the image that you want to insert.

> Click the **Upload** button on the toolbar to add more pictures to the list.

10 Click **Insert**. The selected image is added to the topic.
To change the image, click the image name.

11 To add more topics, use the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

> To insert answers from the previous question into this question, select the **Pipe in Topics** option on the menu. If you pipe in respondent answers, you cannot add any additional topics.

12 To preview your survey and your **Drag & Drop Rank Order** question, on the survey designer toolbar, click the **Preview** button.

Choose One with Image questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Choose One with Image**.

You can add image-based answers to a question, and your survey participants can select only one choice for this question. This question includes the question text followed by the image-based response options. You can customize the appearance of your **Choose One with Image** question and add the validation and logic properties by using the **Question Options** and **Response Options** panels.

You can also show or hide the radio buttons and response text for your question while taking a survey (also in the **Preview** and **Test** modes) by selecting or clearing the **Show Radio Buttons** or **Show Response Text** check box on the **Question Options** panel. In this case, you can still select the needed option by clicking an image.

This feature is available in the **Modern** survey rendering only. If either **Show Radio Buttons** or **Show Response Text** check box is cleared, you cannot switch to the **Classic** survey rendering mode. By default, both check boxes are selected.

Adding and customizing question text and images

Type the text of your **Choose One with Image** question in the text field, and then format the text using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing choice text

After adding your question text, you need to add the choice text. By default, three choices appear. You can add, delete, or move the choices by clicking the menu of the individual choice. To format the choice text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

When you add an image to the **Choose One with Image** question, the image name with extension and the image icon appear to the right of the corresponding response choice. You can point to the image name to see the image preview in a tooltip. In the **Preview** mode, the images are displayed directly in the **Choose One with Image** question.

You can further customize the response choices of the **Choose One with Image** question by using the **Response Options** panel in the left pane. The **Response Options** panel appears when you click the choice.

For more information on the question and choice properties of the **Choose One with Image** question, see Choose One with Image Question Properties, page 308 and Response options, page 330.

The maximum limit on the image name is set to 30 characters. If the image name contains more than 30 characters, it is abbreviated to display appropriately in the question. You can delete the image from your question by clicking the **Delete** icon to the right of the image name.

You must tie the text to images. If you only insert the image, and the participant has JavaScript disabled, the questions will be blank. Additionally, if the participant is using a Web reader, there will be no label to read.

Creating a Choose One with Image question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Choose One with Image**.

You can create a **Choose One with Image** question.

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** view > **Content** tab, click **Choose One with Image**. The **Choose One with Image** question is added to your survey.

> If your survey contains at least one question or other content, you can add the **Choose One with Image** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to edit the question heading. The heading text field becomes editable.

4 Edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

8 To edit the choice text, click in the choice text field.
The choice text field becomes editable.

9 Edit the choice text, and then press **Enter** to save the changes and switch to the next choice.

10 To add the image associated with the choice, click the **Add Image** button.
The image manager opens.

11 Click the image that you want to insert.

> Click the **Upload** button on the toolbar to add more pictures to the list. The maximum image upload size is 1,024.00 KB.

12 Click **Insert**. The image is added to the choice.
To change the image, click the image name.

13 To add more choices, click the **Add Choice** link.
To cancel adding a new choice, press **Esc**.

> When you switch to another choice, the changes you have made to the previous topic are saved automatically.

14 To preview your survey and your **Choose One with Image** question, on the survey designer toolbar, click the **Preview** button.

Choose Many with Image questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Choose Many with Image**.

With the **Choose Many with Image** question type, you can add image-based answers to a question, and your survey participants can select more than one choice for this question. This question includes the question text followed by the image-based response options.

You can customize the appearance of your **Choose Many with Image** question and add the validation and logic properties by using the **Question Options** and **Response Options** panels.

Adding and customizing question text

Type the text of your **Choose Many with Image** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding choice text and images

After adding your question text, you need to add the choice text. By default, three choices appear. You can add, delete, or move the choices by clicking the menu next to each choice. To format the choice text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

When you add an image to the **Choose Many with Image** question, the image name with extension and the image icon appear to the right of the corresponding response choice. You can point to the image name to see the image preview in a tooltip. The maximum character limit on the image name is set to 30. If the image name contains more than 30 characters, it is abbreviated to display appropriately in the question. You can delete the image from your question by clicking the **Delete** icon .

> You must tie text to images. If you only insert the image, and the participant has JavaScript disabled, the questions will be blank. Additionally, if the participant is using a Web reader, there will be no label to read.

Create a Choose Many with Image question

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** view > **Content** tab, click the **Choose Many with Image**. The **Choose Many with Image** question is added to your survey.

> If your survey contains at least one question or other content, you can add an **Choose Many with Image** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to edit the question heading. The heading text field becomes editable.

4 Edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

8 To edit the choice text, click in the appropriate choice text field.
The choice text field becomes editable.

9 Edit the choice text, and then press **Enter** to save the changes and switch to the next choice.

10 To add the image associated with the choice, click the **Add Image** button.
The image manager opens.

11 Click the image that you want to insert.

> Click the **Upload** button on the toolbar to add more pictures to the list. The maximum image upload size is 1,024.00 KB.

12 Click **Insert**. The image is added to the choice.
To change the image, click the image name.

13 To add more choices, use the **Add Choice** link.
To cancel adding a new choice, press **Esc**.

> When you switch to another choice, the changes you have made to the previous topic are saved automatically.

14 To preview your survey and your **Choose Many with Image** question, on the survey designer toolbar, click the **Preview** button.

Fill in the Blank questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Fill In the Blank**.

With the **Fill in the Blank** question type, you can collect fill-in-the-blank responses from your participants. This question is an open-ended question that includes the question text followed by the topic text fields where participants can enter their responses.

You can customize the appearance of your **Fill in the Blank** question and add the validation and logic properties by using the **Question Options** and **Topic Options** panels.

Adding and customizing question text

Type the text of your **Fill in the Blank** question in the corresponding text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

When you open the survey page, all the questions on this page are not selected. You can edit the **Fill in the Blank** question after clicking the question text. On the **Question Options** panel, you can customize the appearance of your question and add the validation and logic properties.

Adding and customizing topic text

After adding your question text, you need to add the topic text. By default, three topics appear. You can add, delete, or move the topics by using the drop-down menu to the right of each topic.

To format the topic text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

You can require users to input a specific type of data into an individual text field by selecting the type of data on the **Input Type** menu on the **Topic Options** panel, which appears when you click the topic.

> In the **Modern** survey rendering mode, there is a hint text for the **Email Address**, **Whole Number**, **Real Number**, **Social Security Number**, **ZIP Code**, and **ZIP+4 Code** input types so that the respondent knows how to answer the question.

You can further customize the topics of your **Fill in the Blank** question by using the **Topic Options** panel.

> You can add the **Fill in the Blank** question to the **Matrix** question as a side.

Create a Fill in the Blank question

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** view > **Content** tab, click **Fill in the Blank**.
The **Fill in the Blank** question is added to your survey. Enter question text in the **Question Text** field. You can customize your text and add images or media to your question using the editing toolbar.

> If your survey contains at least one question or other content, you can add the **Fill in the Blank** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to change the question heading. The heading text field becomes editable.

4 Edit the question heading, and then press **Enter** to save the changes.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** option in the **Question Options** section of your question to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

8 To edit the topic, click in the topic text field. The topic text field becomes editable.

9 Edit the topic text, and then press **Enter** to save the changes and switch to the next choice.

> When you switch to another topic, the changes you have made to the previous topic are saved automatically.

10 Specify the type of data you want participants to input into your **Fill in the Blank** fields by using the **Topic Options** panel.

11 To add more topics, click the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

12 To preview your survey and your **Fill in the Blank** question, on the survey designer toolbar, click the **Preview** button.

Scrolling Matrix questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Scrolling Matrix**.

With the **Scrolling Matrix** question type, you can add image- or text-based answers to a question that scroll across the screen. Additionally, the interactivity of the respondent experience is enhanced.

You can customize the appearance of your **Scrolling Matrix** question and add the validation and logic properties by using the **Question Options**, **Topic Options**, and **Choice Options** panels.

The topic text and the image associated with the topic text are displayed in the middle of the question box. Only one topic appears at a time. The choices are displayed below the topic and are the same for all topics. A counter in the upper-right corner of the question box shows the number of the topic that you are answering and the total number of topics.

You can skip the answer by clicking the **Skip Choice** button in the center of the question box. If the answer is required, the **Skip Choice** button is not displayed.

You can change your answers by clicking the **View** or **Change Answers** button. A list with all your answers appears, where you can click the answer you want, and then change it. For image-based questions, the image appears as your answer, and for text questions, the link appears as your answer. To return to the regular view without any edits, click the **Hide Answers** button.

> This question type may not render ideally on assistive technology devices.

Adding and customizing question text

Type the text of your **Scrolling Matrix** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

On the **Question Options** panel, you can customize the appearance of your question and add the validation and logic properties.

Adding and customizing topic text and images

After adding your question text, you need to add the topic text. By default, three topics appear. You can add, delete, or move the topics by clicking the menu next to each topic. Additionally, you can pipe matrix responses along with images into the **Scrolling Matrix** question by clicking the menu next to the corresponding topic. To format the topic text, use the editing toolbar that appears when you click the topic field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

When you add an image to the **Scrolling Matrix** question, the image name appears to the right of the corresponding topic text. You can point to the image name to see the image preview in a tooltip. The maximum limit on the image name is set to 30 characters. If the image name contains more than 30 characters, it is abbreviated to display appropriately in the question. You can delete the image from your question by clicking the **Delete** icon to the right of the image name.

> You must tie text to images. If you only insert the image and the participant has JavaScript disabled, the questions will be blank. Additionally, if a participant is using a Web reader, there will be no label to read.

Adding and customizing choice text

By default, three choices appear. You can add, delete, or move the choices by clicking the menu to the left of the individual choice. To format the choice text, use the editing toolbar that appears when you click in the choice text field. On the editing toolbar, you can also click the **More** icon to access the expanded editor, which provides additional editing options. Select the **Edit Together** option on the menu to edit all choices together in the rich text editor but place each choice on a separate line.

Because the choices are the same across all topics, you should enter only one set of choices. You can further customize the choices of the **Scrolling Matrix** question by using the **Choice Options** panel, which appears when you click the choice.

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** view > **Content** tab, click **Scrolling Matrix**.
   The **Scrolling Matrix** question is added to your survey.

> If your survey contains at least one question or other content, you can add the **Scrolling Matrix** question by clicking the **Add** button or the **Add** menu.

3. To change the question heading, click the question number, and then edit the question heading. All your changes are saved automatically.
   To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

4. To edit the question text, click in the question text field, edit the question text, and then press **Enter** to save the changes.
   You can customize your text, and add images or media to your question by using the editing toolbar.

While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

5 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

6 To change the row heading, click in the corresponding text field, edit the row heading, and then press **Enter**.

The respondent can view and edit the row heading of the **Scale Slider** question only if the JavaScript is turned off in the browser, and the **JavaScript Required** check box is cleared in the **Properties** tab of the **Design** view.

7 To edit the topic, click in the topic text field, edit the topic text, and then press **Enter** to save the changes and switch to the next topic.

8 To add the image associated with the topic, click the **Add Image** button.
The image manager opens.

9 Click the appropriate image, and then click **Insert**. The image is added to the topic.
To change the image, click the image name.

To add more pictures to the list, on the toolbar, click the **Upload** button.

10 To add more topics, click the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

To insert answers from the previous question into this question, select the **Pipe in Topics** option on the menu. If you pipe in respondent answers, you cannot add any additional topics.

11 To edit the choice, click in the choice text field in the **Choices** section.
The choice text field becomes editable.

12 Edit the choice text, and then press **Enter** to save the changes.

13 To add more choices, select the **Insert Choice** option from the on menu to the left of the choice.

To insert a choice list from the library, on the menu, select the **Add Library Scale** option.

14 To preview your survey and your **Scrolling Matrix** question, on the survey designer toolbar, click the **Preview** button.

Scale Slider questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Scale Slider**.

With the **Scale Slider** question type, you can add image- or text-based answers to a question, and your survey participants can move a slider across the scale to answer this question. The **Scale Slider** question includes images that appear to the left of the slider with the corresponding topic text above the slider. Each topic is displayed as an individual slider with the same choices across all topics. All choices appear across the bottom of the scale with a tick mark representing where the answer is registered. If you drag the slider to a point between the ticks, the slider moves to the nearest option. The selected choice is displayed in bold and indicates your answer.

You can customize your question appearance and the validation and logic properties by using the **Question Options**, **Topic Options**, and **Choice Options** panels.

> Do not rename the N/A label as an answer to the question, for example, **Often** or **Rarely**. With this option, the respondents have a possibility not to select any of the given choices for the question; the value associated with N/A is always zero.

You can answer the **Scale Slider** question in the following ways:

- Drag the slider to the required choice.
- Click the choice name to move the slider to the selected position.
- Select the slider and move it to the required choice by using the appropriate arrow keys on the keyboard.

> This question type may not render ideally on assistive technology devices.

Adding and customizing question text

Type the text of your **Scale Slider** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing topic text and images

After adding your question text, you need to add the topic text and edit the row heading. By default, three topics appear. You can add, delete, or move the topics by using the drop-down menu next to each topic. To format the topic text, use the editing toolbar that appears when you click the topic field. You can also click the **More** icon to access the expanded editor, which provides additional editing options. When you add an image to the **Scale Slider** question, the image name appears to the right of the corresponding topic text. You can point to the image name to see the image preview in a tooltip. The maximum limit on the image name is set to 30 characters.

If the image name contains more than 30 characters, it is abbreviated to display appropriately in the question. You can delete the image from your question by clicking the **Delete** icon to the right of the image name.

> You must tie text to images. If you only insert the image and the participant has JavaScript disabled, the questions will be blank. Additionally, if a participant is using a Web reader, there will be no label to read.

Adding and customizing choice text

By default, three choices appear. You can add, delete, or move the choices by clicking the drop-down menu to the left of the individual choice. To format the choice text, use the editing toolbar that appears when you click in the choice text field. On the editing toolbar, you can also click the **More** icon to access the expanded editor, which provides additional editing options. Select the **Edit Together** option on the menu to edit all choices together in the rich text editor but place each choice on a separate line.

Because the choices are the same across all topics, you should enter only one set of choices. You can further customize the choices of the **Scale Slider** question by using the **Choice Options** panel, which appears when you click the choice.

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** view > **Content** tab, click **Scale Slider**.
   The **Scale Slider** question is added to your survey.

> If your survey contains at least one question or other content, you can add the **Scrolling Matrix** question by clicking the **Add** button or the **Add** menu.

3. To change the question heading, click the question number, and then edit it. All your changes are saved automatically.
   To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading**check box on the **Question Options** panel to make the question heading visible to the respondents.

4. To edit the question text, click in the question text field, edit the question text, and then press **Enter** to save the changes.
   You can customize your text and add images or media to your question by using the editing toolbar.

While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

5 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

6 To edit the row heading, click in the corresponding text field, edit the row heading, and then press **Enter**.

The respondent can view and edit the row heading of the **Scale Slider** question only if the JavaScript is turned off in the browser, and the **JavaScript Required** check box is cleared on the **Design** view > **Properties** tab.

7 To edit the topic, click in the topic text field, edit the topic text, and then press **Enter** to save the changes.

8 To add the image associated with the topic, click the **Add Image** button.
The image manager opens.

9 Click the appropriate image, and then click **Insert**. The image is added to the topic.
To change the image, click the image name.

To add more pictures to the list, on the toolbar, click the **Upload** button.

10 To add more topics, click the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

When you switch to another topic, the changes you have made to the previous topic are saved automatically.

11 To edit the choice, in the **Choices** section, click in the choice text field, edit the choice text, and then to save the changes and switch to the next choice, press **Enter**.

12 To add more choices, click the **Insert Choice** option from the menu to the left of the choice.
To cancel adding a new choice, press **Esc**.

To insert a choice list from the library, on the menu, click the **Add Library Scale** option.

13 To preview your survey and your **Scale Slider** question, on the survey designer toolbar, click the **Preview** button.

Rank Order questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Rank Order**.

You can require participants to rank either all or a subset of topics. Your survey participants can use radio buttons or a list to answer this question.

Adding and customizing question text

Type the text of your **Rank Order** question in the text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also click the **Spell Check** and **Word Count** options. On the **Question Options** panel, you can customize the appearance of your question and add the validation and logic properties.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

Adding and customizing topic text

After adding your question text, you need to add the topic text and edit the row heading. By default, three topics appear. You can add, delete, or move the topics by clicking the menu next to each topic. To format the topic text, use the editing toolbar that appears when you click the topic field. You can also click the **More** icon to access the expanded editor, which provides additional editing options. Additionally, you can select the **Edit Together** option on the menu to edit all topics together in the rich text editor. Place each topic on a separate line.

You can pipe responses into the **Rank Order** question. See Piping values in the Question and Response Text, page 531 for the steps on piping responses from one question into another one.

Adding and customizing column text

By default, three columns appear. The number of columns depends on the number of topics. You can change the default ranks of 1, 2, and 3 to Top, Neutral, and Bottom, for example.

To format the column text, use the editing toolbar that appears when you click the column field. You can also click the **More** icon to access the expanded editor, which provides additional editing options. You can further customize the columns of the **Rank Order** question by using the **Column Options** panel in the left pane. The **Column Options** panel appears when you click the column.

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** view > **Content** tab, click **Rank Order**.
The **Rank Order** question is added to your survey.

> If your survey contains at least one question or other content, you can add the **Rank Order** question by clicking the **Add** button or the **Add** menu.

3 To change the question heading, click the question number, and then edit the question heading. All your changes are saved automatically.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** check box on the **Question Options** panel to make the question heading visible to the respondents.

4 Click the question text field, and then type the question text. You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

5 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

6 To edit the row heading or the topic text, click in the corresponding text field, edit the row heading or the row text, and then press **Enter**.

7 To add more topics, click the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

> To insert answers from the previous question into this question, select the **Pipe in Topics** option on the menu. If you pipe in respondent answers, you cannot add any additional topics.

8 To edit the column, click in the column text field, edit the column text, and then to save the changes and switch to the next column, press **Enter**.

9 To preview your survey and your **Rank Order** question, on the survey designer toolbar, click the **Preview** button.

Create an Image Upload question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Image Upload**.

With the **Image Upload** question, you can add an image-based answer to a question. You can also collect the image geolocation data, add, edit, or remove the image tags.

You can customize the appearance of your **Image Upload** question and add the validation and logic properties by using the **Question Options** panel. You can also customize your text and add images or media to your question by using the editing toolbar.

The **Image Upload** question is available only in the **Modern** survey rendering mode.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

The **Image Upload** question is available for editing in the **Preview** mode only.

Procedure

1. On the **Surveys** tab, click the survey name in the grid.
2. Go to the **Design** view > **Content** tab, click **Image Upload**.

If your survey contains at least one question or other content, you can add the **Image Upload** question by clicking the **Add** button or the **Add** menu.

3. To edit a question heading, click the question number, type a new question heading, and then press **Enter** to save the changes.

   To cancel the changes, press **Esc**.

By default, the question heading is hidden. To make it visible to the respondents, in the **QuestionOptions** section of your question, click **Show Question Heading**.

4. In the question text field, edit the question text, and then press **Enter** to save the changes.

While editing the question, you can use the drag handle to move the mini toolbar.

5. To customize your question appearance, on the editing toolbar, on the **Question Options** panel, add validation or logic properties to your question.
6. To preview your survey and your **Image Upload** question, on the survey designer toolbar, click **Preview**.

After selecting the image to answer the question, the respondent can see the progress bar showing the progress of uploading the image and the **Cancel** button next to it. If the respondent proceeds to the next page, and then clicks **Back**, the image is not displayed, only the image name is displayed.

> If the respondent uses Internet Explorer 9 or earlier, only the image name is displayed after uploading.

When the image is uploaded, its label is immediately shown to the respondent for verification. The following image formats are supported: .bmp, .emf, .exif, .gif, .ico, .jpg, .jpeg, .png, .tiff, and .wmf.

List of property indicators

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > add content to your survey and set some properties for the blocks, pages, questions, and choices.

When you set properties for blocks pages, questions, and choices in the survey designer, the corresponding property indicators appear in the right content pane. The property indicators for questions appear above the question they refer to; the property indicators for pages and blocks appear in the corresponding status bars below the block and page names. You can see the indicators when you are in the **Edit survey** view. Hover over the indicator to see its tooltip.

You can also view the same property indicators on the **Pages** page.

When more than one indicator of the same type is used, the indicators become stacked. Stacked indicators have a numeric value of how many properties are covered by the stack. In the tooltip of a stacked indicator, you can view each property on a separate line.

List of Property Indicators	
	“Allocation” is set for a “Fill in the Blank” or “Matrix” question with the “Short Answer” side.
	• Answer Required" is set for a question. • "Respondent Must Pick" is set for a "Choose Many" question. It is used with the "Answer Required" option. • Respondent Must Rank" is set for a "Drag & Drop Rank Order" or "Rank Order" question. • "Answer Required" is set for a topic in a "Fill in the Blank" question.
	• Conditional visibility is set for a question choice. The icon is displayed along with a condition summary above the question. • Conditional visibility is set for a question. The icon is displayed along with a condition summary above the question. • Conditional visibility is set for a row. The icon is displayed along with a condition summary in a tooltip.
	• "Destination" is set for a question. The icon is displayed along with a destination summary below the question. • "Destination" is set for a question choice. The icon is displayed along with a destination summary below the question.
	• "Exclusive" is set for a choice in a "Choose Many" question. • "Only Allow a Column to be Selected Once" is set for the side in a "Matrix" question.

List of Property Indicators	
	• "Fixed Position" is set for a choice in a question. It is used with the "Randomize Choices" option. • "Fixed Position" is set for a row in a "Matrix" question. It is used with the "Randomize Table Rows" option.
	• "Randomize Choices" is set for a question. • "Randomize Table Rows" is set for a "Matrix" question. • "Randomize Topics" is set for a question. • "Add Page Randomization" is set for a block.
	• "Page Rotation" is set for a block.
	• Conditional Visibility is set for a page. The icon is displayed along with a condition summary below the page name. • Conditional Visibility is set for a block. The icon is displayed along with a condition summary below the block name.
	The "Hidden" visibility is set for a question.
	• Validation is set for a topic in a "Fill in the Blank" question along with a short validation summary in a tooltip. • Validation is set for a "Short Answer" question along with a short validation summary in a tooltip.

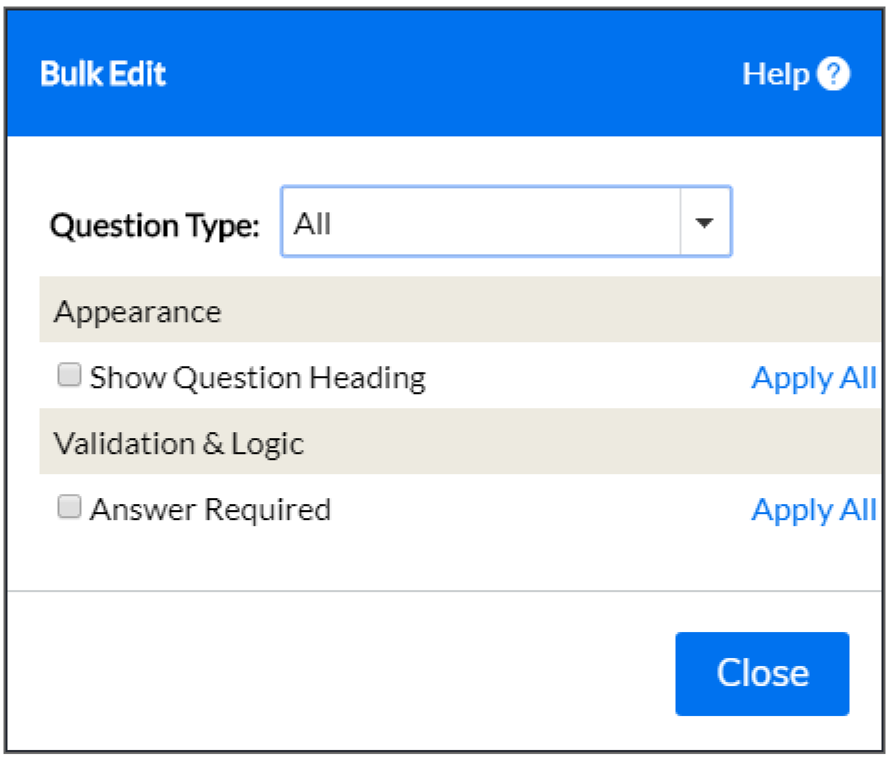
Bulk Edit

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open a saved survey from the **My Surveys** grid > **Design** tab > add a question to your survey > **Question Options** > **Bulk Edit** link > **Bulk Edit** dialog box.

You can use the **Bulk Edit** link to change the properties of survey questions at a time instead of editing each one separately. The **Bulk Edit** option is only applicable to the questions of the current survey, which belong to the same question type.

The question properties in the **Bulk Edit** dialog box differ depending on the selected question type. For each question type, you can edit the **Appearance** and **Validation & Logic** properties. For **Matrix** questions only, you can also edit the **HTML Table Appearance** properties.



The Bulk Edit dialog box

Choose One Question Properties

Navigation

Projects tab > **Surveys** tab > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** menu > **Choose One** button.

You can use the **Question Options** panel to customize the appearance, validation, and logic properties for the **Choose One** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Choose One** question. With the question properties, you can control how your question looks in the survey and set specific conditions and limitations for your question.

Layout

Format your **Choose One** question by selecting the layout options below. In **Classic** survey rendering mode, the **Table Row**, **List Box**, **Drop-down Box**, and **Star Rating** layout options are not available if the **Include "Please Specify" Option** check box is selected. In **Modern** survey rendering mode, only the **Table Row** and **Star Rating** layout options are not available if the **Include "Please Specify" Option** check box is selected.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **List**

The **List** option is selected by default.

- **Scale**

Labels for the first and last choices are used as anchor labels, with remaining choice labels hidden. If choice groups are applied, labels for the first and last choice groups are used as anchor labels. See Choice groups, page 328 for information on applying choice groups in the **Choose One** questions.

- **Rows**
- **Columns**

The **Columns** option includes a drop-down list where you can specify the number of columns that displays in your question.

- **Table Row**

In **Modern** survey rendering mode, the width between choices in the **Table Row** layout for the **Choose One** question is the same no matter how many characters the choice label contains. If the choice label contains too many characters, to fit to the width, the word will be moved to a new line, and only if the word is too long, it will be broken with proper hyphenation.

- **List Box**
- **Drop-down Box**

The **Drop-down Box** option includes the **Caption** drop-down list where you can specify the default text that the respondent will see in the drop-down list, such as **None**, **Click here to choose**, or **Click here for choices**.

- **Star Rating**

The number of stars matches the number of question choices. For example, if there are five choices in the question, you can rate each choice from 1 to 5 stars. When you hover over the star, the current star and all preceding stars appear in yellow, and the current choice text is displayed in a tooltip. Respondents can answer the question by clicking the star under the selected position. The selected star and all preceding stars appear in green.

If the respondent has JavaScript disabled, the **Star Rating** layout is changed to the **Scale** layout for the question.

- **Button**

> The **Button** layout is available in **Modern** survey rendering mode only. When switching to **Classic** rendering mode, the **Button** layout changes to the **Scale** layout. For more information about survey rendering modes, see Survey rendering overview, page 414.

If choice groups are applied, labels for the first and last choice groups are used as anchor labels. For more information about applying choice groups in the **Choose One** questions, see Choice groups, page 328.

Options

Use the following options to customize your **Choose One** question appearance:

- **Show Question Heading** – Show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Choices** – Sow question choices in a random order when the survey is viewed or page is refreshed. The choices within the choice groups are randomized too. The order of choice groups is not changed.

> Randomization is not available for the **Scale**, **Table Row**, **Star Rating**, and **Button** layout options.

- **Reverse Order of Choices** – Show question choices in an opposite order when the survey is viewed or page is refreshed.

> For the **Star Rating** layout option, the **Randomize Choices** and **Reverse Order of Choices** options are not available.

- **Answer Required** – Require respondents to answer the question before moving to the next page or submitting the survey.
- **Answer Required for "Please Specify" Options** – Require respondents to type information in the specified fields before moving to the next page or submitting the survey. This property is only visible if you add the "**Please Specify**" option to a response.

> When **"Please Specify"** response option is selected, question layout is changed to **List** layout.

- **Hide Clear Star Selection Option** – Hide the **Clear Star Selection** option from the participants.
- **Show Clear Star Selection on Right** – Display the **Clear Star Selection** option to the right of the stars.

> The **Hide Clear Star Selection Option** and **Show Clear Star Selection on Right** options are available only for the **Star Rating** layout option.

- **Display Rating** – Display rating to the right of the stars.
- **Tile Vertically on Mobile** – Display buttons vertically instead of horizontally on mobile devices.
- **Button Width (in pixels)** – Specify the button width by typing the needed value here. The width of the button will not be smaller than this value, but can exceed it to be sufficient for larger choice text.

> The **Tile Vertically on Mobile** and **Button Width (in pixels)** options are available only for the **Button** layout option.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode.
> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Preselected

Select an option from this drop-down list to specify the answer that will be selected for your question by default. The available options are **None** and all question choices. **None** is a default value.

> In **Modern** survey rendering mode, if the question choice is conditionally preselected, the **Conditionally Determined** option appears in the **Preselected** drop-down list. For more information, see Define response conditional preselection criteria, page 338.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The **Destination** functionality requires that the original and target questions are separated by page break.

The available options are **Not Set**, **End**, and all questions that follow the current question. **Not Set** is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Choose Many Question Properties

Navigation

Projects tab > **Surveys** tab > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** drop-down menu > **Choose Many** button.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Choose Many** question. With the question properties, you can control how your question looks in the survey and set specific limitations and conditions for your question.

Layout

Format your **Choose Many** question by selecting the following layout options:

- **List**

> The “List” option is selected by default.

- **Scale**

Labels for the first and last choices are used as anchor labels, with remaining choice labels hidden. If choice groups are applied, labels for the first and last choice groups are used as anchor labels. See Choice groups, page 328 for information on applying choice groups in the **Choose Many** questions.

- **Rows**
- **Columns**

The **Columns** option includes a drop-down list where you can specify the number of columns that displays in your question.

- **Table Row**

In **Modern** survey rendering mode, the width between choices in the **Table Row** layout for the **Choose Many** question is equal no matter how many characters the choice label contains. If the choice label contains too many characters, to fit to the width, the word will be moved to a new line, and only if the word is too long, it will be broken with proper hyphenation.

Options

Use the following options to customize your **Choose Many** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Choices** – Select to show question choices in a random order every time the survey is viewed or page is refreshed. The choices within the choice groups are randomized too. The order of choice groups is not changed.

> Randomization is not available for the **Scale**, **Table Row**, and **Star Rating** layout options.

- **Reverse Order of Choices** – Select to show question choices in an opposite order every time the survey is viewed or page is refreshed.

- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Answer Required for "Please Specify" Options** – Select to require respondents to enter information in the specified fields before moving to the next page or submitting the survey. This property is only visible if you add the "Please Specify" option to a response.
- **Respondent Must Pick** – Select an option from the "Respondent Must Pick" drop-down list to require respondents to provide a minimum, maximum, or exact number of responses. "No response required" is a default value.

> If you select the "Answer Required" check box, the default value for "Respondent Must Pick" is "At least 1 Choice."

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode.
> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups.
> In the future EFM releases, **Classic** survey rendering will not be supported.

Least Filled Choices

Select the number of choices with the lowest response rate from the **Least Filled Choices** drop-down list to allow autoselection of those choices if the respondent did not choose any.

> The **Least Filled Choices** option is only available for the **Modern** survey rendering.
> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups.
> In the future EFM releases, **Classic** survey rendering will not be supported.

When the respondent starts a survey, choice ranks are determined for any **Choose Many** questions, which use the autoselection option. Each choice is assigned a unique rank based on the number of respondents, who selected that choice. If one or more choices have the same count, a rank is assigned at random. These ranks are stored in session and used for autoselection.

> If the respondent selects a choice for the question, nothing is autoselected regardless of the **Least Filled Choices** setting.

Autoselection works for the choices and pages, which are visible or conditionally visible (if the visibility criteria are met) for the respondent and all questions regardless of their visibility. Choices marked as **Exclusive** do not support autoselection.

> If the **Answer Required** option is selected, the **Least Filled Choices** option is disabled.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Short Answer question properties

Navigation

Projects tab > **Surveys** tab > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** drop-down menu.

Setting the **Short Answer** question properties helps you control the question appearance and set specific conditions and limitations for your question.

Options

Use the following options to customize your **Short Answer** question:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The available options are **Not Set**, **End**, and all questions that follow the current question. **Not Set** is a default value. You can set the destination to any custom end page by selecting the custom page from the drop-down list.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client.

Other Options

- **Input Type** – Select the type of data you want the participants to input into a particular topic text field.

- **Display Spin Buttons** – This option is available for the **Numbers** input type. When the **Numbers** input type is selected, the spin buttons appear in the text box. By default, this check box is not selected.

For older questionnaires with the ShortAnswer question, the **Display Spin Buttons** option is selected by default.

The **Display Spin Buttons** option is available only in the **Modern** survey rendering mode.

- **Display as Slider** – This option is available for the **Numbers** input type. When the **Numbers** input type is selected, the topic is displayed as a slider. Also, a text box appears containing the numerical value that the current position of the slider represents. A minimum and maximum value must be assigned to represent the range for the slider. The **Slider Step** defines the numerical value used to separate each position on the slider.

If you select the **Display as Slider** check box for the **Short Answer** question, the **Display Spin Buttons** option is unavailable.

- **Display as Calendar Pop-up** – The calendar pop-up is displayed for the **Dates** input type.
- **Caption** – This option is available for the "AutoDropdowns" input type and defines the default text that the respondents see in the drop-down list when nothing is currently selected.
- **Instructions** – If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer. The **Instructions** option is available only in **Modern** survey rendering mode.

The **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **Preselected** – The choice is selected by default but can still be modified.
- **Alignment** – Select the option to align characters in the text box to the left, center, or right.
- **Symbol** – Select a symbol to display to the right of the text box. The following options are available: %, $, and EA.
- **Insert symbol to the left of the box** – Select the check box to align value selected from the Symbol drop-down list to the left of the text box. By default, this option is inactive.
- **Minimum Length** – The respondent's answer must equal or exceed the value you enter here.
- **Maximum Length** – The respondent's answer must not exceed the value you enter here.
- **Valid Characters** – Limit the acceptable characters that can be entered for the question.
- **Text Box Width (in characters)** – Define the width of the text field in characters. This layout option is available only in classic survey rendering mode.
- **Text Mask** – Define the format for the text entry. Use "9" for numbers, "X" for letters, and "?" for any character.
- **Validate Topics** – Select whether all or only specific entries are allowed. The following options are available:
    - **All Entries are allowed** – When you select this option, all entries are valid.

- **Entries must follow this rule** – When you select this option, the expression drop-down list and the text box to the right are activated. You can specify the validation rule to follow. The available expressions depend on what **Input Type** is associated with the topic.

You can also pipe the profile data into the survey by using the **Insert Piped Value** icon. When you click the **Insert Piped Value** icon, the **Insert Piped Value** dialog box opens with all the information that can be piped into the survey. The information includes all profiles created inside the current workgroup.

Fill in the Blank Question Properties

Navigation

Projects tab > **Surveys** tab > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** drop-down menu > **Fill in the Blank** button.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Fill in the Blank** question. With the question properties, you can control how your question looks in the survey and set specific conditions and limitations for your question.

Layout

Use the following options to specify the alignment of question labels and text boxes:

- **Top Aligned** – Display the topic text above the text box.
- **Right Aligned** (default) – Display the topic text on the same line as a text box, aligned to the right.

When right-to-left format is applied to the survey, **Left Aligned** becomes a default alignment.

- **Left Aligned** – Display the topic text on the same line as a text box, aligned to the left.

The **Layout** section is available only in **Modern** survey rendering. For more information about survey rendering modes, see Survey rendering overview, page 414.

Options

Use the following options to customize your **Fill in the Blank** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Show Running Total** – Select to display the **Total** field in your **Fill in the Blank** question that shows the total number of respondent's answers. You can edit the name of this field under **Total Label**. The **Total Label** property appears when you select the **Show Running Total** check box. You can use the **Show Running Total** together with the **Allocation** functionality.

Validate all the **Fill in the Blank** question topics as a real or whole number under **Input Type** to use the **Show Running Total** feature.

For a published question, you can change the **Show Running Total** properties if all **Fill in the Blank** question topics are numeric only.

- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Allocation** – Select to require respondents to enter numbers in the **Fill in the Blank** question topics that will total to a specified amount. Next, select the amount to which the respondent's answers must total from the drop-down list that appears. The default value is 100.

Validate all the **Fill in the Blank** question topics as a real or whole number under **Input Type** to use the **Allocation** feature.

For a published question, you can change the **Allocation** properties if all **Fill in the Blank** question topics are numeric only.

Validate the **Fill in the Blank** question topic as a real or whole number under **Input Type** to use the **Display Spin Buttons** feature. When the **Display Spin Buttons** check box is selected, the spin buttons ▲▼ appear in the text box. By default, this check box is not selected.

For older questionnaires with the **Fill in the Blank** question, the **Display Spin Buttons** option is selected by default.

The **Display Spin Buttons** option is available only in the **Modern** survey rendering mode.

If you select the **Display as Slider** check box for the **Fill in the Blank** question topic, the **Display Spin Buttons** option is unavailable.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

The **Instructions** option is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The **Destination** functionality requires that the original and target questions are separated by page break.

The available options are **Not Set**, **End**, and all questions that follow the current question. **Not Set** is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Fill in the Blank questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Fill In the Blank**.

With the **Fill in the Blank** question type, you can collect fill-in-the-blank responses from your participants. This question is an open-ended question that includes the question text followed by the topic text fields where participants can enter their responses.

You can customize the appearance of your **Fill in the Blank** question and add the validation and logic properties by using the **Question Options** and **Topic Options** panels.

Adding and customizing question text

Type the text of your **Fill in the Blank** question in the corresponding text field, and then format the text by using the editing toolbar. On the editing toolbar, click the **More** icon to open the expanded editor, which provides additional editing options. In the expanded editor, you can also use the **Spell Check** and **Word Count** options.

> If the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared, the **Media Manager** button is hidden in the editing toolbar. For more information, see General Setup, page 1406.

When you open the survey page, all the questions on this page are not selected. You can edit the **Fill in the Blank** question after clicking the question text. On the **Question Options** panel, you can customize the appearance of your question and add the validation and logic properties.

Adding and customizing topic text

After adding your question text, you need to add the topic text. By default, three topics appear. You can add, delete, or move the topics by using the drop-down menu to the right of each topic.

To format the topic text, use the editing toolbar that appears when you click the choice field. You can also click the **More** icon to access the expanded editor, which provides additional editing options.

You can require users to input a specific type of data into an individual text field by selecting the type of data on the **Input Type** menu on the **Topic Options** panel, which appears when you click the topic.

> In the **Modern** survey rendering mode, there is a hint text for the **Email Address**, **Whole Number**, **Real Number**, **Social Security Number**, **ZIP Code**, and **ZIP+4 Code** input types so that the respondent knows how to answer the question.

You can further customize the topics of your **Fill in the Blank** question by using the **Topic Options** panel.

> You can add the **Fill in the Blank** question to the **Matrix** question as a side.

Create a Fill in the Blank question

Procedure

1 On the **Surveys** tab, click the survey name in the grid.

2 Go to the **Design** view > **Content** tab, click **Fill in the Blank**.
The **Fill in the Blank** question is added to your survey. Enter question text in the **Question Text** field. You can customize your text and add images or media to your question using the editing toolbar.

> If your survey contains at least one question or other content, you can add the **Fill in the Blank** question by clicking the **Add** button or the **Add** menu.

3 Click the question number to change the question heading. The heading text field becomes editable.

4 Edit the question heading, and then press **Enter** to save the changes.
To cancel the changes, press **Esc**.

> By default, the question heading is hidden. You can select the **Show Question Heading** option in the **Question Options** section of your question to make the question heading visible to the respondents.

5 To edit the question text, click in the question text field.
The question text field becomes editable.

6 Edit the question text, and then press **Enter** to save the changes.
You can customize your text and add images or media to your question by using the editing toolbar.

> While editing the question and choice texts, you can use the drag handle to move the mini toolbar.

7 On the **Question Options** panel, customize your question appearance and add the validation and logic properties.

8 To edit the topic, click in the topic text field. The topic text field becomes editable.

9 Edit the topic text, and then press **Enter** to save the changes and switch to the next choice.

> When you switch to another topic, the changes you have made to the previous topic are saved automatically.

10 Specify the type of data you want participants to input into your **Fill in the Blank** fields by using the **Topic Options** panel.

11 To add more topics, click the **Add Topic** link.
To cancel adding a new topic, press **Esc**.

12 To preview your survey and your **Fill in the Blank** question, on the survey designer toolbar, click the **Preview** button.

Essay Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Essay Question**.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Essay** question. With the question properties, you can control how your question looks in the survey and set specific limitations and conditions for your question.

Layout

Format your "Essay" question by setting the following layout options:

- **Text Box Width** – Set the text box width of the **Essay** question in characters. This layout option is available only in classic survey rendering mode.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **Text Box Height** – Set the text box height of the **Essay** question in lines.

Options

Use the following options to customize your **Essay** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

The **Instructions** option is available only in **Modern** survey rendering mode.Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Preselected

Type the answer that will appear for your question by default. You can type up to 255 characters in the field. "None" is a default value.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Characters Limitation

Manage the characters in your **Essay** question by using the following options:

- **Enable Characters Limitation** – Select to limit the amount of text that respondents can enter while answering your "Essay" question. In the text box, enter the number of characters to limit.
- **Enable Characters Counter** – Select to count the number of characters entered in the "Essay" question. The counter is available only if you activate the "Enable Characters Limitation" option. The respondent can see the number of characters remaining within the text field. Blank spaces are counted as characters.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Essay Text Box Width and Height

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Text Box Width** and **Text Box Height** text boxes.

You can set the text box width and height of the **Essay** question and the "Essay" side of the **Matrix** question. The **Essay** text box width is measured in characters and the text box height-in lines. Additionally, you can resize the text box by dragging its edge.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

The table below shows the maximum, minimum, and default values for the **Essay** width and height.

The Essay question			
Width (in characters)		Height (in lines)	
Max	255	Max	255
Min	3	Min	1
Default	62	Default	3

The "Essay" side of the Matrix question			
Width (in characters)		Height (in lines)	
Max	255	Max	255
Min	3	Min	1
Default	30	Default	3

For the **Essay** question, you can adjust the text box width and height on the **Question Options** panel.

For the "Essay" side of the **Matrix** question, you can adjust the text box width and height on the **Matrix Side Options** panel.

Limiting the Characters Number in Essay

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Enable Characters Limitation** check box.

You can limit the number of characters that respondents enter when answering an **Essay** question type. The default value is 1500 characters, but you can change it. The minimum value is **0**. Blank spaces are counted as characters.

Standard validation message appears to notify respondents when they are over the limit. Validation message includes the character limit and the number of characters submitted.

To activate the character limitation, select the **Enable Characters Limitation** check box. The **Enable Characters Limitation** check box is clear by default, and respondents can enter an unlimited number of characters when they answer the **Essay** question.

> You can use "Enable Characters Limitation" together with the "Enable Characters Counter" functionality. The respondent can see the number of characters remaining within the text field.

You can also apply the character limitation for an "Essay" side of the **Matrix** question.

Limit the characters in an Essay Question

Procedure

1 Add an **Essay** question.

2 On the **Question Options** panel to the left, select the **Enable Characters Limitation** check box.

3 In the text box, enter the limit of characters for your **Essay** question.

Limit the characters in all the Essay Questions

Procedure

1 Add the **Essay** questions to your survey.

2 On the **Question Options** panel to the left, click the **Bulk Edit** link. The **Bulk Edit** dialog box opens.

3 From the **Question Type** drop-down list, select **Essay**.

4 Select the **Enable Characters Limitation** check box.

5 Enter the limit of characters for all the **Essay** questions.

6 Click **Apply All**.

7 Click **Close**.

Characters Counter in Essay

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Enable Characters Counter** check box.

You can provide the respondents with a counter that shows the number of characters remaining within an **Essay** field. The characters are counted automatically as respondents enter the text. Characters counter helps better plan the answer to the **Essay** question.

The counter is available only if you activate the **Enable Characters Limitation** option. To activate the characters counter, select the **Enable Characters Counter** check box. This check box is selected by default.

You can also apply the characters counter for an "Essay" side of the **Matrix** question. The characters counter appears for each field of the **Matrix** question. See images below.

The counter goes backwards. Blank spaces are counted as characters.

You can change the default text of the counter on the **Labels** tab in the **Question Labels** section. The default text is the following:

- **Character limit: %1** for the characters left with JavaScript disabled
- **%1 characters left** for the characters left with JavaScript enabled

Activate the Characters Counter in an Essay Question

Procedure

1. Add an **Essay** question.
2. On the **Question Options** panel to the left, select the **Enable Characters Limitation** check box.
3. In the text box, enter the limit of characters for your **Essay** question.
4. Select the **Enable Characters Counter** check box.

Activate the Characters Counter in All the Essay Questions

Procedure

1. Add the **Essay** questions to your survey.
2. On the **Question Options** panel to the left, click the **Bulk Edit** link. The **Bulk Edit** dialog box opens.
3. From the **Question Type** drop-down list, select **Essay**.
4. Select the **Enable Characters Limitation** check box.
5. In the text box, enter the limit of characters for all the **Essay** questions.
6. Click **Apply All**.
7. Select the **Enable Characters Counter** check box.
8. Click **Apply All**.
9. Click **Close**.

Drag & Drop Rank Order Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Drag & Drop Rank Order** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Drag & Drop Rank Order** question. With the question properties, you can control how your questions look in the survey and set specific limitations and conditions for your question.

> Click the question text field to view the **Question Options** panel that provides available options for your question.

Options

Use the following options to customize your **Drag & Drop Rank Order** question appearance:

- **Show Question Heading** – Select to show the question heading to the respondents. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Topics** – Select to show question responses in a random order when the survey is viewed or page is refreshed.
- **Answer Required** – Select to require respondents to answer your question before moving to the next page or submitting the survey.
- **Respondent Must Rank** – Select an option from the "Respondent Must Rank" drop-down list to require respondents to rank all, top, minimum, or other number of responses. The following options are available:
  - **Any number of topics** – The respondents can rank any number of topics.
  - **At Least # Topic(s)** – The respondents must rank at least # topics.
  - **At Most # Topic(s)** – The respondents must rank no more than # topics.
  - **Top # Topic(s)** – The respondents must rank top # topics.
  - **All Topics** – The respondents must rank all options. This is the default option.

> For the question containing one topic, only "Any number of topics" and "All Topics" options are available.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears. The following visibility options are available:

- **Shown** – The survey question is shown.
- **Hidden** – The survey question is hidden.

- **Conditional** – The question is shown or hidden according to the certain conditions.

If the question is "Conditionally Hidden," no validation is performed on it. Thus if you activate the "Destination" and "Answer Required" options for the "Conditionally Hidden" question, they will be skipped in the published survey.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The available options are "Not Set," "End," custom end pages, and all questions that follow the current question. "Not Set" is a default value.

> The "Destination" functionality requires that the original and target questions are separated by page break.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Rank Order Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Rank Order** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Rank Order** question. With the question properties, you can control how your question looks in the survey and set specific conditions and limitations for your question.

Layout

Format your **Rank Order** question by selecting the following layout options:

- **Radio Buttons**

> The **Radio Buttons** layout is selected by default.

- **Drop-down Box**

The "Drop-down Box" option includes the **Caption** drop-down list where you can specify the default text that the respondent will see in the drop-down list, such as "None," "Click here to choose," or "Click here for choices."

Options

Use the following options to customize your **Rank Order** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Topics** – Select to show question responses in a random order when the survey is viewed or page is refreshed.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Respondent Must Rank** – Select an option from this drop-down list to require respondents to rank all, top, minimum, or any number of responses. "All Topics" is a default value. The following options are available:
  - **Any number of topics** – The respondents can rank any number of topics.
  - **At Least # Topic(s)** – The respondents must rank at least # topics.
  - **At Most # Topic(s)** – The respondents must rank no more than # topics.
  - **Top # Topic(s)** – The respondents must rank top # topics.
  - **All Topics** – The respondents must rank all options. This is the default option.

> For the question containing one topic, only "Any number of topics" and "All Topics" options are available.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> For the question containing one topic, only "Any number of topics" and "All Topics" options are available.

> The **Instructions** option is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Choose One with Image Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Choose One with Image** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Choose One with Image** question. With the question properties, you can control how your question looks in the survey and set specific conditions and limitations for your question.

Layout

In **Classic** survey rendering mode, format your **Choose One with Image** question by selecting the following layout options:

- **List** – Choices are listed one below the other.
- **Columns** – From the drop-down list, select the number of columns that appear in your question.

The **Columns** option with three columns is selected by default.

In **Modern** survey rendering mode, format your **Choose One with Image** question by selecting the following layout options:

- Small Images
- Large Images

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Options

Use the following options to customize your **Choose One with Image** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Choices** – Select to show question responses in a random order when the survey is viewed or page is refreshed.
- **Reverse Order of Choices** – Select to show question choices in an opposite order when the survey is viewed or page is refreshed.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Answer Required for "Please Specify" Boxes** – Select to require respondents to enter information in the specified fields before moving to the next page or submitting the survey. This property is only visible if you add the "Please Specify" option to a response.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode.
> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Preselected

Select an option from this drop-down list to specify the answer that will be selected for your question by default. The available options are **None** and all question choices. **None** is a default value.

> In **Modern** survey rendering mode, if the question choice is conditionally preselected, the **Conditionally Determined** option appears in the **Preselected** drop-down list. For more information, see Define response conditional preselection criteria, page 338.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Choose Many with Image Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Question Options** panel > **Choose Many with Image** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Choose Many with Image** question. With the question properties, you can control your questions look in the survey and set specific limitations and conditions for your question.

Click the question text field to view the **Question Options** panel that provides available options for your question.

The **Question Options** panel is divided into the "Layout," "Options," and "Visibility" sections, which include a number of appearance, validation and logic properties for the **Choose Many with Image** question.

Layout

In **Classic** survey rendering mode, format your **Choose Many with Image** question by selecting the following layout options:

- **List -** Choices are listed one below the other.
- **Columns -** From the drop-down list, select the number of columns that appear in your question.

The **Columns** option with three columns is selected by default.

In **Modern** survey rendering mode, format your **Choose Many with Image** question by selecting the following layout options:

- Small Images
- Large Images

The **Small Images** option is selected by default.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Options

Use the following options to customize your **Choose Many with Image** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.

- **Randomize Choices** – Select to show question choices in a random order when the survey is viewed or page is refreshed.
- **Reverse Order of Choices** – Select to show question choices in an opposite order when the survey is viewed or page is refreshed.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Answer Required for "Please Specify" Boxes** – Select to require respondents to enter information in the specified fields before moving to the next page or submitting the survey. This property is only visible if you add the "Please Specify" option to a response.
- **Respondent Must Pick** – Select an option from the drop-down list to require respondents to provide a minimum, maximum, or exact number of responses. "No Response Required" is the default option.

> If you select the "Answer Required" check box, the default value for "Respondent Must Pick" is "At least 1 Choice."

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears. The following visibility options are available:

- **Shown** – The survey question is shown.
- **Hidden** – The survey question is hidden.
- **Conditional** – The question is shown or hidden according to the certain conditions.

If the question is "Conditionally Hidden," no validation is performed. Thus if you activate the "Destination" and "Answer Required" options for the "Conditionally Hidden" question, they will be skipped in the published survey.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Least Filled Choices

Select the number of choices with the lowest response rate from the **Least Filled Choices** drop-down list to allow autoselection of those choices if the respondent did not choose any.

The **Least Filled Choices** option is only available for the **Modern** survey rendering. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

When the respondent starts a survey, choice ranks are determined for any **Choose Many** questions, which use the autoselection option. Each choice is assigned a unique rank based on the number of respondents, who selected that choice. If one or more choices have the same count, a rank is assigned at random. These ranks are stored in session and used for autoselection.

If the respondent selects a choice for the question, nothing is autoselected regardless of the **Least Filled Choices** setting.

Autoselection works for the choices and pages, which are visible or conditionally visible (if the visibility criteria are met) for the respondent and all questions regardless of their visibility. Choices marked as **Exclusive** do not support autoselection.

If the **Answer Required** option is selected, the **Least Filled Choices** option is disabled.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," custom end pages, and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Matrix Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Matrix** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Matrix** question. With the question properties, you can control how your question looks in the survey and set specific limitations and conditions for your question.

> Click the question text field to view the **Question Options** panel that provides available options for your question.

Options

Use the following options to customize your **Matrix** question appearance:

- **Show Question Heading** – Select to show the question heading to the respondents. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Table Rows** – Select to show table rows of a question in a random order every time the survey is viewed or page is refreshed. The **Matrix** question with randomized table rows is marked accordingly.

> If you randomize table rows, the "Repeat headings every __ Row(s)" option for **Matrix** is not available.

- **Indicate Odd and Even Rows** – Select to show a different background color for even and odd table rows. The color depends on the survey theme selected for your survey on the **Formatting** tab. Click the **Preview** button on the survey designer toolbar to view the currently applied theme. For information on applying survey themes, see Survey Formatting Tab, page 409.
- **Repeat headings every __ Row(s)** – Select to show the headings (columns) again after every specified number of rows. It is useful for the **Matrix** questions with a large amount of rows because headings may not be visible on the screen when survey participants respond to the later question options.

> If you randomize table rows, set a number of visible topics, or pipe in values, the "Repeat headings every __ Row(s)" option for **Matrix** is not available.

- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.

Validate the **Matrix** question topic as a real or whole number under **Input Type** to use the **Display Spin Buttons** feature. When the **Display Spin Buttons** check box is selected, the spin buttons appear in the text box. By default, this check box is not selected.

For older questionnaires with the **Matrix** question, the **Display Spin Buttons** option is selected by default.

The **Display Spin Buttons** option is available only in the **Modern** survey rendering mode.

If you select the **Display as Slider** check box for the **Matrix** question topic, the **Display Spin Buttons** option is unavailable.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

The following visibility options are available:

- **Shown** – The survey question is shown.
- **Hidden** – The survey question is hidden.
- **Conditional** – The question is shown or hidden according to the certain conditions.

If the question is "Conditionally Hidden," no validation is performed on it. Thus if you activate the "Destination" and "Answer Required" options for the "Conditionally Hidden" question, they will be skipped in the published survey.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

The **Instructions** option is available only in **Modern** survey rendering mode.
Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Number of Rows Visible

Select an option from the "Number of Topics Visible" drop-down list to specify how many of the first available topics (rows) in the question your participants will see when taking your survey. The provided options are "All" and number of rows available for the current question. Click the **Test** button on the survey designer toolbar to view your selection.

You can also insert values from other questions or profiles by clicking the "Insert Piped Data" icon next to the drop-down list. For more information on piping data, see Piping Responses, page 541.

If you set a number of visible topics or pipe in values, the "Repeat headings every __ Row(s)" option for **Matrix** is not available.

Destination

Select an option from the "Destination" drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Matrix Columns Randomization and Fixing

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Matrix** question.

You can randomize columns in a **Matrix** question to minimize answer bias from respondents. You can randomize columns of the **Choose One** and **Choose Many** matrix sides. The columns are randomized at the side level, so one survey can contain both randomized and not randomized sides. Select the **Randomize Choices** check box on the **Matrix Side Options** panel to activate this option. The columns randomization is not active by default.

When the columns randomization is activated, the corresponding notification appears in the survey designer for you. Survey participants do not see this notification when they take a survey.

> The matrix columns randomization does not affect the ability to pipe columns from previous questions.

Additionally, you can fix position of one or more columns so that they do not change their position in a matrix when other columns are randomized. When you select the **Randomize Choices** check box, the **Fixed Position** check box appears on the **Column Options** panel. You can fix position of any matrix column by selecting the **Fixed Position** check box for it.

Fixed columns appear at the end (far right) of the side or beginning (far left) of the side so that both right-to-left and left-to-right languages are accommodated. If multiple criteria are fixed, they are contiguous at the beginning or end of the side.

Activate the matrix columns randomization

Procedure

1. Go to the **Design** tab.
2. Add a **Matrix** question to your survey.
3. Click the "Click to edit category text" text. The **Matrix Side Options** panel appears to the left of your question.
4. Select the **Randomize Choices** check box.

Fix the column position in a matrix question

Procedure

1. Go to the **Design** tab.
2. Add a **Matrix** question to your survey.
3. Click the "Click to edit category text" text. The **Matrix Side Options** panel appears to the left of your question.
4. Select the **Randomize Choices** check box.
5. Click the "Column Text" text for the column you want to fix. The **Column Options** panel appears to the left of your question.

6 Select the **Fixed Position** check box.

Scrolling Matrix Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Scrolling Matrix** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Scrolling Matrix** question. With the question properties, you can control how your question looks in the survey and set specific conditions and limitations for your question.

Layout

The "Columns" option includes a drop-down list where you can specify the number of columns that displays in your question.

Options

Use the following options to customize your **Scrolling Matrix** question appearance:

- **Show Question Heading** – Select to show the question heading. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Topics** – Select to show question responses in a random order when the survey is viewed or page is refreshed.
- **Randomize Choices** – Select to show question choices in a random order when the survey is viewed or page is refreshed.
- **Reverse Order of Choices** – Select to show question choices in an opposite order when the survey is viewed or page is refreshed.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click **Conditional**, and then click the **Criteria** link that appears.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

The **Instructions** option is available only in **Modern** survey rendering mode.
Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">. You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question.

Scale Slider Question Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Scale Slider** question.

On the **Design** tab, you can access the properties for your survey questions. The question properties vary depending on the question type you select. This topic provides an overview of all question level properties for the **Scale Slider** question. With the question properties, you can control how your questions look in the survey and set specific limitations and conditions for your question.

Click the question text field to view the **Question Options** panel that provides available options for your question.

Layout

Use the following options to customize your **Scale Slider** question layout:

- **Slider** – Each topic is displayed as an individual slider with the same choices across all topics. All choices appear across the bottom of the scale with a tick mark representing where the answer is registered. If you drag the slider to a point between the ticks, the slider moves to the nearest option. The selected choice is displayed in bold and indicates your answer.
- **Star** – Each topic is displayed as an individual star with the same choices across all topics. The respondents can rank variables by using the star rating displayed to the right of each topic. The number of stars matches the number of question choices, for example, if there are 5 choices in the question, you can rate each choice from 1 to 5 stars. When you hover over the star, the current star and all preceding stars appear in yellow, and the current choice text is displayed in a tooltip.

  Respondents can answer the question by clicking the star under the selected position. The selected star and all preceding stars appear in green. Respondents can clear their selection by clicking the red round icon. You can remove this icon from the question by selecting the **Hide Clear Star Selection Option** check box in the **Options** section.

The **Hide Clear Star Selection Option** check box is available only when the “Star" layout option is selected.

If the respondent has JavaScript disabled, the "Star" layout is changed to the "Scale" layout for the question.

You can add one or multiple coded values (Not Applicable, Don’t Know, and Refused) to a question with star and slider layout. To add a coded value, select it from the **Coded Value** drop-down list on the **Choice Options** panel. Adding a coded value to a question excludes it from the **Coded Value** list for the current question.

You can only add coded values starting from the end of the choice list.

As a result, coded value check boxes appear to the right of a star group or slider. If you set a coded value to Not Applicable, Don’t Know, or Refused, be sure to set an appropriate label on a choice to convey that meaning.

Selecting a coded value check box clears the previously selected star rating or slider choice. Selecting a star or slider choice clears the coded value check box. Only one check box can be selected at a time.

> The coded values are not counted as valid responses in **Response Manager** and when generating reports.

- **Slider Width (in pixels)** – Specify the width of the slider in pixels.

> For the "Star" layout option, the "Slider Width (in pixels)" option is not available. Also it is not available in **Modern** survey rendering mode.

Options

Use the following options to customize your **Scale Slider** question appearance:

- **Show Question Heading** – Select to show the question heading to the respondents. By default, the question heading is hidden, and only the question text appears in the survey.
- **Randomize Sliders** – Select to show your question responses in a random order when the survey is viewed or page is refreshed. Your question with randomized sliders is marked accordingly in a survey designer.
- **Reverse Order of Choices** – Select to show your question choices in an opposite order when the survey is viewed or page is refreshed.

> For the "Star" layout option, the "Reverse Order of Choices" option is not available.

- **Answer Required** – Select to require respondents to answer your question before moving to the next page or submitting the survey.
- **Hide Clear Star Selection Option** – Select to hide the **Clear Star Selection** option from the participants.
- **Show Clear Star Selection on Right** – Select to display the **Clear Star Selection** option to the right of the stars.
- **Display Rating** – Select to display rating to the right of the stars.

> For the “Slider” layout option, the "Hide Clear Star Selection Option," "Show Clear Star Selection on Right," and “Display Rating” options are not available.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, click Conditional, and then click the **Criteria** link that appears. The following visibility options are available:

- **Shown** – The survey question is shown.
- **Hidden** – The survey question is hidden.

- **Conditional** – The question is shown or hidden according to the certain conditions.

If the question is "Conditionally Hidden," no validation is performed. Thus if you activate the "Destination" and "Answer Required" options for the "Conditionally Hidden" question, they will be skipped in the published survey.

Instructions

If you want to provide additional instructions to your question, type short text in the **Instructions** text box. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

> The **Instructions** option is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Preselected

Select an option from the "Preselected" drop-down list to specify the answer that will be selected for your question by default. The available options are "None" and all question choices. "None" is a default value.

Number of Topics Visible

Select an option from the "Number of Sliders Visible" drop-down list to specify how many of the first available topics in the question your participants will see when taking your survey. The provided options are "All" and number of topics available for the current question. Click the **Test** button on the survey designer toolbar to view your selection.

You can also insert values from other questions or profiles by clicking the "Insert Piped Data" icon next to the drop-down list. For more information on piping data, see Piping Responses, page 541.

Destination

Select an option from the **Destination** drop-down list to specify what respondents will see after they answer the question and move to the next page. To move to the next page, insert a page break between the original and destination questions.

> The "Destination" functionality requires that the original and target questions are separated by page break.

The available options are "Not Set," "End," custom end pages, and all questions that follow the current question. "Not Set" is a default value.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information on end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question styling of your survey, add a custom CSS class to a question's wrapping container. Any text that you type into this text box appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question essay customclassgoeshere">. You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type **survey 123456**, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric numbers, whereas the regular expression [_a-zA-Z] matches the alphabetic characters.

Custom Properties

Click the **Custom Properties** link to create additional question properties, which are used by your Web Service client. You can add a set of name and value pairs for your question

Image Upload question properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** view > **Content** tab > **Add** menu > **Image Upload** question.

Setting the **Image Upload** question properties helps you to control the question appearance and specify certain conditions and limitations for your question.

> The **ImageUpload** question is available only in **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Options

Use the following options to customize your **Image Upload** question:

- **Show Question Heading** – Select to show question heading. By default, question heading is hidden and only question text appears in the survey.
- **Answer Required** – Select to require respondents to answer the question before moving to the next page or submitting the survey.
- **Allow Photo Tagging** – Select to allow respondents to add, edit, or remove the image tags. Respondents can add a tag by clicking **Add Tag** or by clicking anywhere in the uploaded image.

> Respondents can add, edit, and delete tags only if the survey is opened and if the **JavaScript Required** check box is selected in the **Properties** side tab of the **Design** tab.

- **Allow Location Collection** – Select to collect the image geolocation data (the latitude and longitude that the image was taken at) if available and turned on a device.

Visibility

Select whether to show or hide your question in a published survey. The hidden question is only visible to you and is marked accordingly. To set conditions for the question's visibility, on the **Question Options** side tab, select **Conditional**, and then click the **Criteria** link that appears to edit the **Question Visibility** details.

Instructions

If you want to provide additional instructions to your question, type the text you want to add in the **Instructions** text box on the **Question Options** side tab. The instructions text appears right under the question text in a survey. You can preview it by clicking the **Preview** button on the survey designer.

Destination

If you want to specify what respondents will see after they answer the question and move to the next page, select the needed option from the **Destination** drop-down list on the **Question Options** side tab. To move to the next page, insert a page break between the original and destination questions.

> The **Destination** functionality requires that the source and target questions are separated by a page break.

The available options are **Not Set** (default value), **End**, and all questions that follow the current question.

You can set the destination to any custom end page by selecting the custom page from the drop-down list. For more information about end pages, see End Pages Pagination Panel, page 396.

Additional CSS Keywords

If you want to change the question style of your survey, on the **Question Options** side tab, add a custom CSS class to a question's wrapping container. Any text that you type into this wrapping container appears in the containing div for that question at the end of the system generated classes. For example, <div id="Q5_WRAPPER" class="question poem customclassgoeshere">.

You can enter a sequence of classes, separating each of them with a space. When applied to the generated HTML, any classes that do not match the -?[_a-zA-Z]+[_a-zA-z0-9-]* regular expressions are not shown. For example, if you type survey 123456, the numeric class is not shown.

> The regular expression [_a-zA-z0-9-] matches the alphanumeric characters, whereas the regular expression [_a-zA-Z] matches the alphabetical characters.

Custom Properties

If you want to create additional question properties used by your Web Service client, click the **Custom Properties** link on the **Question Options** side tab. You can add a set of name and value pairs for your question.

> If the browser has JavaScript disabled, and you cleared the **JavaScript Required** check box in the **Properties** response of the **Design** tab, the respondent will be able to answer the **Image Upload** question. The response image will not be displayed. To change the response image, the respondent needs to click the image name, and then upload a new image.

Choice groups

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab.

You can use choice groups for the **Choose One**, **Choose Many**, and **Matrix** (**Choose One** and **Choose Many** sides) questions to divide a long series of choices into descriptive groups. Thus you can organize responses to make them easier for respondents to understand.

For the **Choose One** question, choice groups are supported for the following layouts: **List**, **Scale**, **Table Row**, **List Box**, and **Drop-down Box**. For the **Choose Many** question, choice groups are supported for the following layouts: **List**, **Scale**, and **Table Row**.

> You cannot combine choices with coded values into choice groups.

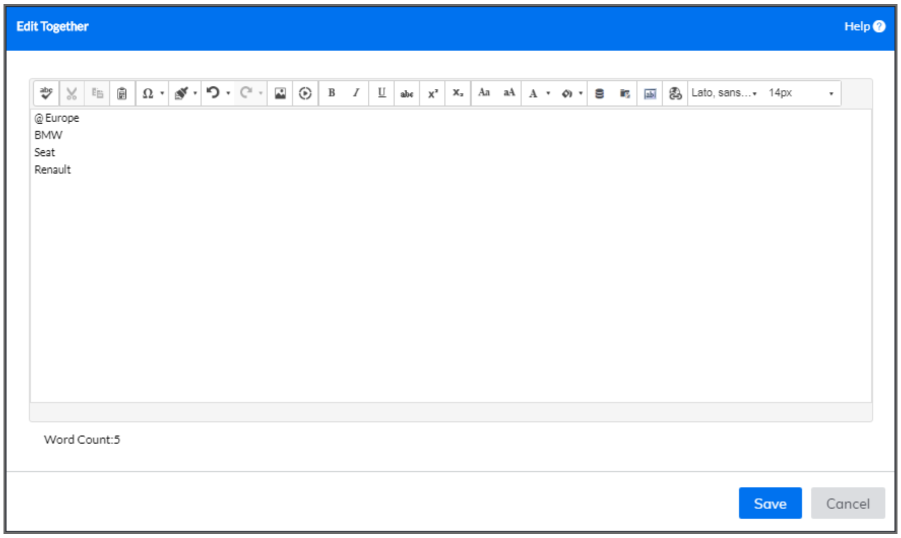
Add the Choice Groups

Procedure

1. On the **Content** tab of the **Design** view, add a "Choose One" question, for example. The drop-down menu icon appears next to each response within this question.
2. Click the drop-down menu icon next to any of the responses within the question.
3. On the drop-down menu, click **Edit Together**. The **Edit Together** dialog box opens.

> You can create choice groups in the Edit Together view only.

4. To add a choice group to a question, enter a "@" sign followed by a space, and then add the text on separate lines.



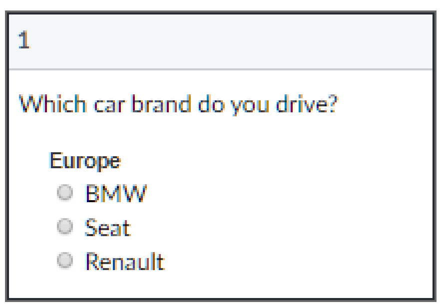
The choice group in the Designer mode

5 Click **Save**.

6 To randomize the choices within the choice groups, on the **Question Options** panel, select the **Randomize Choices** check box to minimize answer bias from your respondents. The order of choice groups is not changed. Randomization is not available for the **Scale**, **Table Row**, and **Star Rating** layout options.

> For the **Matrix** questions, randomization of choice groups is only available in the **Modern** survey rendering.
> Starting with the EFM 15.1 FP3 release, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

7 Click the **Preview** button on the survey designer toolbar to view your question with the applied choice groups.



The choice group preview

Response options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Add** menu > click the question you want to add to the survey > click the response within the question > **Response Options** panel.

Choice level properties may vary depending on the question type, including the **Choose One**, **Choose Many**, **Fill in the Blank**, **Matrix**, **Scrolling Matrix**, and **Scale Slider**.

Choose One and Choose One with Image

- **Include "Please Specify" Option** – Select the check box so that the respondents can provide their own answers.
- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The choice visibility status appears above the question.
- **Preselection** – Specify the answer to be selected for your question by default.

  The following options are available:
  - **Unselected**
  - **Selected**
  - **Conditional**
- **Hint** - Specify the ghost text for the response. The default text is **Please specify**.

> This feature is available only when the **Include "Please Specify" Option** check box is selected.

- **Destination** – Specify the page and the question to which the respondents will be redirected after they select a particular choice/response, and then click **Next**. The destination status appears below the choices.

> You can set destination to any custom end page by selecting the custom page on themenu. For more information, see End Pages Pagination Panel, page 396.

- **Coded Value** – Assign a database code for the response so that this response is ignored for the reporting purposes.

> This option is only available for the last question choice and is used for questions with the **Other** or **Not Applicable** choices.

  This option allows a response option to be coded as one of the following items:
  - **Not Applicable**
  - **Don't Know**
  - **Refused**

  When coded, the response will be stored in the database as -1 for **Not Applicable**, -2 for **Don't Know**, and -3 for **Refused**. The application will disregard this data during the calculation of means and other summary statistics within the reporting and analysis modules.

> If the **Randomize Choices** or **Reverse Order of Choices** options are applied to the question, the choices with coded values always remain in fixed position at the end of the choice list. This is also applicable if choice groups are used in the question

- **Report Value** – Specify answers to designate the specific types of common answers that will be stored in the database with special values. With this option, you can assign a value of positive numbers only.

> The report values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- **Export Value** – Define special values to be used for exports (TSV, CSV, SPSS and XLSX). You can select to view the export values in the **Response Manager** grid by clicking the **View Data Type** option on the **Actions** menu. If export value is not specified for the choice, the default choice number is used as an export value.

> The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

  The following order of priority determines what value is displayed to the left of the choice in the survey designer:

  a. **Export Value** (if set)

  b. **Report Value** (if set)

  c. **Choice Index**

- For example, if both export and report values are set for the choice, the export value is displayed.

Choose Many and Choose Many with Image

- **Include "Please Specify" Option** – Select the check box so that the respondents can provide their own answers.
- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The choice visibility status appears above the question.
- **Preselection** – Specify the answer to be selected for your question by default.

  The following options are available:

  - **Unselected**
  - **Selected**
  - **Conditional**
- **Exclusive** – Deselect other choices when this choice is selected.
- **Destination** – Specify the page and the question to which the respondents will be redirected after they select a particular choice/response, and then click **Next**. The destination status appears below the choices.

- **Export Value** – Define the values that you choose to be displayed in the **Response Manager** grid. For example, if you want to display negative numbers in the **Response Manager** grid and in the response exports, specify this option in the survey designer. When it is not specified, the default choice numbers appear in the **Response Manager** grid as the export values.

> The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

Matrix

Row options

Visibility – Define whether the selected response will be shown, hidden, or conditional. The choice visibility status appears above the question.

Column options

- **Visibility** – Define whether the selected column will be shown, hidden, or conditional. The visibility status of a choice appears above the question.

> The **Visibility** option is available only for the **Matrix** with **Choose One** and **Choose Many** sides. If the **Matrix** with **Choose One** or **Choose Many** side uses Pipe in Columns, the Visibility option is unavailable.

- **Preselection** – Specify the answer to be selected for the question by default.

  The following options are available:
  - **Unselected**
  - **Selected**
  - **Conditional**
- **Coded Value** – Define the applicable coded value options. Adding a coded value to a choice excludes it from the **Coded Value** menu for the previous choice. Coded value option is available only for the **Choose One** sides.

> If the **Randomize Choices** or **Reverse Order of Choices** options are applied to the question, the choices with coded values always remain in fixed position at the end of the choice list. This is also applicable if choice groups are used in the question.

- **Report Value** – Specify answers to designate the specific types of common answers that will be stored in the database with the special values. With this option, you can assign a value of positive numbers only.

> The report values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- **Export Value** – Define the values that you choose to display in the **Response Manager** grid. For example, if you want to display negative numbers in the **Response Manager** grid and in the response exports, specify this option in the survey designer. When it is not specified, the default choice numbers appear in the **Response Manager** grid as the export values.

> The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

The following order of priority determines what value is displayed to the left of the choice:

a. **Export Value** (if set)

b. **Report Value** (if set)

c. **Choice Index**

For example, if both export and report values are set to the choice, the export value will be displayed.

Scrolling Matrix

Topic options

- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The choice status of a choice appears above the question.

Choice Options

- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The choice status of a choice appears above the question.
- **Coded Value** – Define the applicable coded value options. Adding a coded value to a choice excludes it from the **Coded Value** menu for the previous choice.

> If the **Randomize Choices** or **Reverse Order of Choices** options are applied to the question, the choices with coded values always remain in fixed position at the end of the choice list.

- **Report Value** – Specify the answers to designate the specific types of common answers that will be stored in the database with special values. With this option, you can assign a value of positive numbers only.

> The report values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- **Export Value** – Define the values that you choose to display in the **Response Manager** grid. For example, if you want to display negative numbers in the **Response Manager** grid and in the response exports, specify this option in the survey designer. When it is not specified, the default choice numbers appear in the **Response Manager** grid as the export values.

The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- The following order of priority determines what value is displayed to the left of the choice:
  a. **Export Value** (if set)
  b. **Report Value** (if set)
  c. **Choice Index**

  For example, if both export and report values are set to the choice, the export value will be displayed.

Scale Slider

Topic options

- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The visibility status of a choice appears above the question.

Choice options

- **Visibility** – Define whether the selected response will be shown, hidden, or conditional. The visibility status of a choice appears above the question.
- **Preselection** – Click the option to specify the answer to be selected for your question by default.

  The following options are available:
  - **Unselected**
  - **Selected**
  - **Conditional**
- **Coded Value** – Define the applicable coded value options. Adding a coded value to a choice excludes it from the **Coded Value** menu for the previous choice.

If the **Randomize Choices** or **Reverse Order of Choices** options are applied to the question, the choices with coded values always remain in fixed position at the end of the choice list.

- **Report Value** – Specify the answers to designate the specific types of common answers that will be stored in the database with special values. With this option, you can assign a value of positive numbers only.

The report values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- **Export Value** – Define the values that you choose to display in the **Response Manager** grid. For example, if you want to display negative numbers in the **Response Manager** grid and in the response exports, specify this option in the survey designer. When it is not specified, the default choice numbers appear in the **Response Manager** grid as the export values.

The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

The following order of priority determines what value is displayed to the left of the choice:

a. **Export Value** (if set)

b. **Report Value** (if set)

c. **Choice Index**

For example, if both export and report values are set to the choice, the export value will be displayed.

Rank Order

Choice Options

- **Report Value** – Specify the answers to designate the specific types of common answers that will be stored in the database with special values. With this option, you can assign a value of positive numbers only.

The report values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

- **Export Value** – Define the values that you choose to display in the **Response Manager** grid. For example, if you want to display negative numbers in the **Response Manager** grid and in the response exports, specify this option in the survey designer. When it is not specified, the default choice numbers appear in the **Response Manager** grid as the export values.

The export values are also visible in the survey designer and criteria designer for branching, triggers, quota, and conditional visibility for choices, questions, and pages. When the export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

The following order of priority determines what value is displayed to the left of the choice:

a. **Export Value** (if set)

b. **Report Value** (if set)

c. **Choice Index**

For example, if both export and report values are set to the choice, the export value will be displayed.

Fill in the Blank

You can require users to enter the specific type of data into topic text boxes. On the **Input Type** menu, select the type of data that you want the participants to enter into a particular topic text field. You can also require survey participants to provide a response to a selected topic text box in the **Fill in the Blank** question.

- **Answer Required** – Set the requirement for the respondents to answer an individual choice before they can move to the next page.
- **Display as Slider** – Display topic as a slider, when the **Numbers** input type is selected.

> The option is available for the **Numbers** input type.

A text box appears containing the numerical value that the current position of the slider represents. A minimum and maximum values must be assigned to represent the range for the slider. The **Slider Step** defines the numerical value that is used to separate each position on the slider.

- **Display as Calendar Pop-up** – Display the calendar pop-up window for the **Dates** input type.
- **Caption** – Define the default text that the respondents see in the drop-down list when nothing is currently selected.

> The option is available for the **AutoDropdowns** input type.

- **Preselected** – Display the choice that is selected by default but still can be modified.
- **Alignment** – Select the option to align characters in the text box to the left, center, or right.
- **Symbol** – Select a symbol to display to the right of the text box. The following options are available: %, $, and EA.
- **Insert symbol to the left of the box** – Display the symbol selected on the **Symbol** menu to the left of the text box. By default, this option is inactive.
- **Text Area Width** – Set the width of the **Text Area** by moving a slider. You can set the width value to the **Smallest**, **Small**, **Medium**, **Wide**, or **Widest**.

> The layout option is available only in the **Modern** survey rendering mode. For more information, see Text Box Width and Text Area Width, page 343.

- **Minimum Value** – Set the respondent's answer to be equal or exceed the value that you enter.
- **Maximum Value** – Set the respondent's answer not exceed the value that you enter.
- **Valid Characters** – Limit the acceptable characters that can be entered for the question.
- **Text Box Width (in characters)** – Set the width of each text box in characters.

> The layout option is available only in the **Classic** survey rendering mode. For more information, see Text Box Width and Text Area Width, page 343.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

- **Text Mask** – Define the format for the text entry. Enter **9** for numbers, **X** for letters, and **?** for any character.
- **Validate Topics** – Select whether all or only specific entries are allowed.

  The following options are available:

  - **All Entries are allowed** – When you select this option, all entries are valid.

- **Entries must follow this rule** – When you select this option, the expression drop-down list and the text box to the right are activated. You can specify the validation rule to follow. The available expressions depend on what **Input Type** is associated with the topic.

You can also pipe the profile data into the survey by clicking the icon. In the **Insert Piped Value** dialog box, all information that can be piped into the survey is displayed. The information includes all profiles created inside the current workgroup. For more information, see Insert profile questions or data, page 1248.

Define response conditional preselection criteria

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > click the response within your question > **Response Options** panel > **Preselection** section > **Conditional** option > **Criteria** link > **Response Preselection** dialog box.

You can set criteria for question choices and matrix rows.

If a respondent's answer matches the specified criteria, the question choice on the next page is already preselected.

In the **Modern** survey rendering mode, in the conditional visibility criteria designer, you can set a response count criterion with the values from 0 to the specific number of choices or columns in the **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

You can set the criterion to conditionally preselect choices based on the count of responses provided by the respondent. For example, if you want the choice to be preselected and in the response preselection criteria designer you specify that the response count criterion equals 2, the choice is conditionally preselected, if the respondent's answers match the specified criterion.

Preselected option on choice level is available only in the **Modern** survey rendering mode and is supported by the **Choose One**, **Choose Onewith Image**, **Choose Many**, **Choose Manywith Image**, **Matrix** (with **Choose One** and **Choose Many** sides), and **Scale Slider** questions.

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.
2 On the **My Surveys** page, create a new survey or open an existing one.
3 On the **Analyze** tab, click the question choice.
4 On the **Response Options** panel, in the **Preselection** section, click the **Conditional** option.
5 Click the **Criteria** link that appears next to the **Conditional** option.
6 Click the link next to **Source**, and then select one of the following sources:
   - **Current Survey** (default) – Select to apply response preselection based on the survey questions or device type.

   a. In the first drop-down list, select one of the following options to apply the logic to:
      - The survey question
      - The response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions
      - The device type criterion

> The device type and the response count criteria can be combined with other criteria for branching.

b. In the second drop-down list, select the expression.

c. In the third drop-down list, select one of the following:

- Question choice
- Number of responses provided by the respondent
- Detected type of device

> The values list includes the actual response options for the question. The choices are numbered in the same way as the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, enter the expected response or leave the text box empty.

- **Participant Information** – Select to apply response preselection to the campaign:

a. In the first drop-down list, **Campaign Name** is selected.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click the needed campaign.

> The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply response preselection based on the location parameter:

a. In the first drop-down list, select the needed parameter.

b. In the second drop-down list, select the expression, and then enter the needed value in the adjacent box.

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as an identifier for the choice.

7 To save a single criterion, click **Save**.

8 To add more criteria, click **Add Another Criteria**, and then add several criteria.

> You can combine criteria of all types.

9 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion.

10 In the **Response Preselection** dialog box, click **OK**.

If more than one choice is conditionally preselected, the choice visibility icon that is showing the total number of the preselected choices appears above the question.

Text Mask Validation

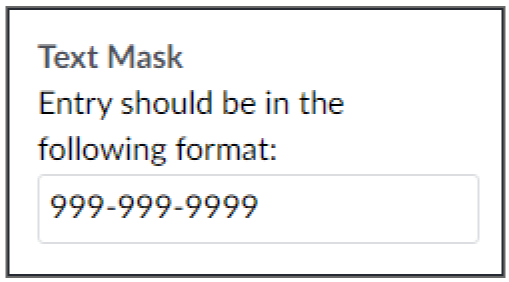
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > add the **Fill in the Blank** question > click the topic within the **Fill in the Blank** question > **Topic Options** pane > **Text Mask** text box.

You can use the Text Mask functionality to validate a specific way for participants to respond the **Fill in the Blank** question.

If you specify a text mask for your question, your survey participants are required to enter the response in the designated format. For example, you want your participants to answer a specific question in the following format: 999-999-9999. You can specify that you do not want any dashes or perhaps that you want parentheses.

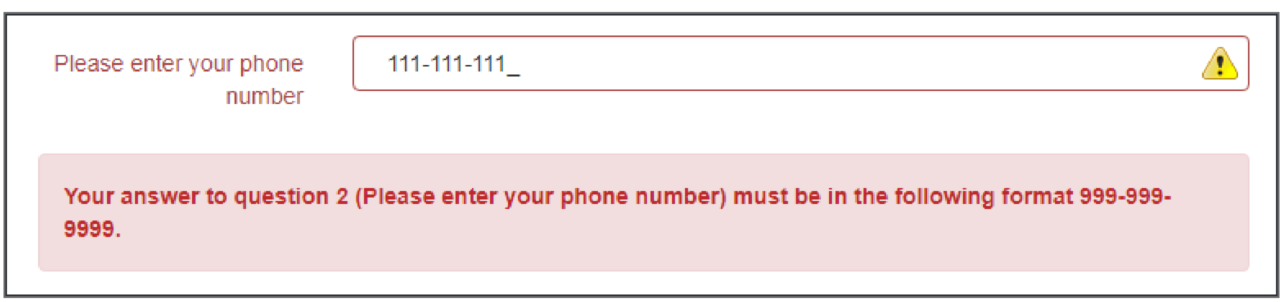
The **Text Mask Validation** is also available for the **Short Answer** question.



The Text Mask box with entry

Enter **9** to represent numbers, **X** to represent letters, and **?** for any character. You can use the text mask for entering other types of information, like social security number or any other code, email address, etc.

If participants do not enter the information in the specified format, they receive a message that shows how to enter the response. In the example below, the participant entered the phone number in the wrong format (used parentheses), so the message appeared to show the participant the correct format to use for entering the phone number.



A question with text mask applied

Once the participant enters the phone number in the correct format (999-543-1212), the survey moves on to the next question, or the participant can submit the survey.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. On the **Analyze** tab, select the **Fill in the Blank** question that you want to use with the **Text Mask** option.
4. To view the **Topic Options** panel, click the topic within the selected question.
5. In the **Text Mask** text box, enter the phone number format that you want your participants to use for phone numbers.

Text Box Width and Text Area Width

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > add the **Fill in the Blank** question > click the topic within the **Fill in the Blank** question > **Topic Options** pane > **Text Box Width** text box or **Text Area Width** slider.

You can set the width of each individual field of the **Fill in the Blank** question by using the **Text Box Width** box or **Text Area Width** slider on the **Topic Options** panel.

The **Text Box Width** is also available for the **Short Answer and Essay** questions.

Text Area Width

You can set the text area for the **Fill in the Blank** question width by moving a slider.

Each of the **Text Area Width** values in the **Modern** survey rendering mode corresponds to a certain character width property in the **Classic** rendering:

- **Smallest** – 5
- **Small** – 10
- **Medium** – 20
- **Wide** – 40
- **Widest** – 80

Text Box Width (in pixels)

You can limit maximum text area width for the **Fill in the Blank**, **Short Answer**, and **Essay** questions by specifying the needed value (from 66 to 2000 pixels) in the **Text Box Width (in pixels)** text box. The width of this text box will meet this maximum value if space allows, but will shrink down to fit smaller screen resolutions.

For the **Fill in the Blank** question, this value cannot exceed but can be smaller than the **Widest Text Area Width** value.

Text Box Width (in characters)

You can specify the following values for the **Fill in the Blank**, **Short Answer**, and **Essay** text box width (in characters):

- Maximum – 255
- Minimum – 0
- Default – 40

For the **Short Answer** side of the **Matrix** question, you can specify the width of the whole side only, which is applied to all text boxes. Additionally, you can adjust the text box width for the **Short Answer** side of the **Matrix** question by using the **Text Box Width (in characters)**text box on the **Matrix Side Options** panel.

> The **Text Area Width**,**Text Box Width (in pixels)**, and **Text Box Width (in characters)** layout options are available only in the **Classic** survey rendering mode.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

Define conditional visibility for topics

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > add the **Scrolling Matrix** question > click the topic within the **Scrolling Matrix** question > **Topic Options** panel.

You can use the Conditional Visibility functionality to customize the survey by hiding some topics based on the respondent's answer to the previous questions in the survey.

You can hide topics of the following matrix question types:

- Matrix
- Scale Slider
- Scrolling Matrix

You can hide individual topics based on one or several conditions. Conditional logic is used to hide topics depending on how a respondent answers the previous question in the survey. A page break is required between the two questions to implement this logic.

It is recommended to set minimum validation on the dependent questions.

You can fully or conditionally hide a topic by using the Visibility property, which is available at the topic level of a question.

To set conditions for the topic's visibility, click the **Conditional** option, and then click the **Criteria** link. You can specify the test question, expression, value, and operator if you have multiple criteria.

In the **Choice Visibility** dialog box, the following options are available:

- **When the following criteria are met** – Select either to show or hide the choice based on the visibility criteria by clicking the drop-down list.
- **Question** – Specify the question to be checked for logic by selecting it in the drop-down list.
- **Expression** – Select the expression in the drop-down list.
- **Choice** – Select the response option in the drop-down list. The list includes the actual response options for the selected question.

To save a single criteria, click the **Save** link. To add more items, click the **Add Another Criteria** link. To save your settings and exit the dialog box, click **OK**.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. On the **Analyze** tab, click the needed topic within the selected question.
4. On the **Topic Options** panel, click the **Conditional** option, and then click the **Criteria** link.
5. In the **Choice Visibility** dialog box, on the **When the following criteria are met** menu, select either to show or hide the choice based on the visibility criteria.
6. To add the visibility criteria, click the **Add Another Criteria** link. The question, expression, and choice drop-down lists appear.
7. In the questions drop-down list, select the survey question to which you want to apply the logic. You can hover over a question to view the full question in a tooltip.

> The criteria options are only available from previous pages. You cannot add criteria to questions from the current or next pages. Thus for the first survey page you cannot select any question.

8 Select the expression in the drop-down list. The available options are:

- Equal To
- Not Equal To
- Less Than
- Greater Than
- Less Than Or Equal
- Greater Than Or Equal

9 Select the choice option in the drop-down list.

> The list includes the actual choice options for the selected question. The choices are numbered in the same way as in the survey designer for your convenience. You can hover over a choice to view a tooltip with the full question and highlighted choice in bold.

10 To save a single criterion, click the **Save** link.

11 To add more criteria, click the **Add Another Criteria** link.

Add several criteria if needed.

12 To specify either all or any of the criteria must be met, select the corresponding radio button next to the **Match** option.

The following options are available:

- **All Criteria** – All criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The drop-down lists with parentheses and the **And/Or** operators appear next to each criterion.

13 To apply the selected visibility options to other choices, click the **Save and Apply to Others** button.

14 In the **Apply to Others** dialog box, apply the visibility logic to other choices by selecting the corresponding check boxes.

The check box of the currently selected choice is inactive.

> If the choices already have criteria, the criteria will be overwritten.

15 Click **Save**.

16 In the **Choice Visibility** dialog box, click **OK**. The choice visibility status appears above the question text in the right content area.

> You can test your survey to ensure that the appropriate topics are hidden according to the specified criteria.

Related topics

Matrix questions, page 254

Add conditional visibility choices rows columns, page 512

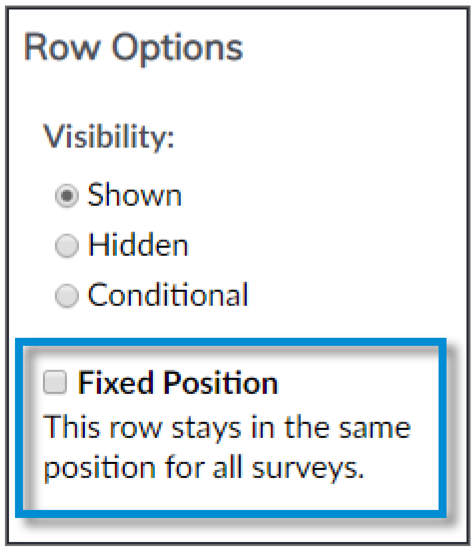
Fix row position in Matrix question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > add the **Matrix** question > **Question Options** panel.

You can fix the position of one or more rows so that they do not change their position in a matrix when other rows are randomized.

When you select the **Randomize Table Rows** check box, the **Fixed Position** check box appears on the **Row Options** panel. You can fix the position of any matrix row by selecting the **Fixed Position** check box.



The Fixed Position check box

When the survey is published, the row with the fixed position stays in the same position as in the survey designer.

Procedure

1. Go to the**Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. On the **Analyze** tab, select the **Matrix** question.
4. On the **Question Options** panel, select the **Randomize Table Rows** check box.
5. In a **Matrix** question, click the row that you want to fix.
6. On the **Row Options** panel, select the **Fixed Position** check box.

> The **Fixed Position** check box is available only when the **Randomize Table Rows** check box is selected.

Activate Scrolling Matrix choices randomization

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Content** tab > add the **Scrolling Matrix** question > **Question Options** panel.

You can randomize choices of the **Scrolling Matrix** question to minimize the impact of bias in respondent answers.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. On the **Analyze** tab, add a **Scrolling Matrix** question.
4. On the **Question Options** panel, select the **Randomize Choices** check box.

When the choices randomization is activated, the **Scrolling Matrix** choices are displayed in a randomized order to a respondent. In addition, the notification about random choices appears in the survey designer. The survey participants do not see this notification when they take a survey.

> The choices randomization does not affect the functionality of piping choices from the previous questions.

Managing questions by using the drop-down menu

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > click a question > click the menu.

You can manage questions by using the menu in the question heading.
The following options are available:

- Format question and response text in expanded editor, page 370 – Edit the question text in the expanded editor that provides additional editing options.
- Edit report options, page 371 – Edit the report and export values for all question choices. The specified values are used when reporting on the question or exporting it.

> You can change the question report and export values when designing a survey or after its publishing.

- Checking spelling, page 373 – Check the spelling in the question text.
- Messages and Labels tab, page 418 – Edit the default messages and labels in a question. Selecting this option redirects you to the **Labels** tab (specifically to **Question Labels**), where you can change the default text for the question you need.

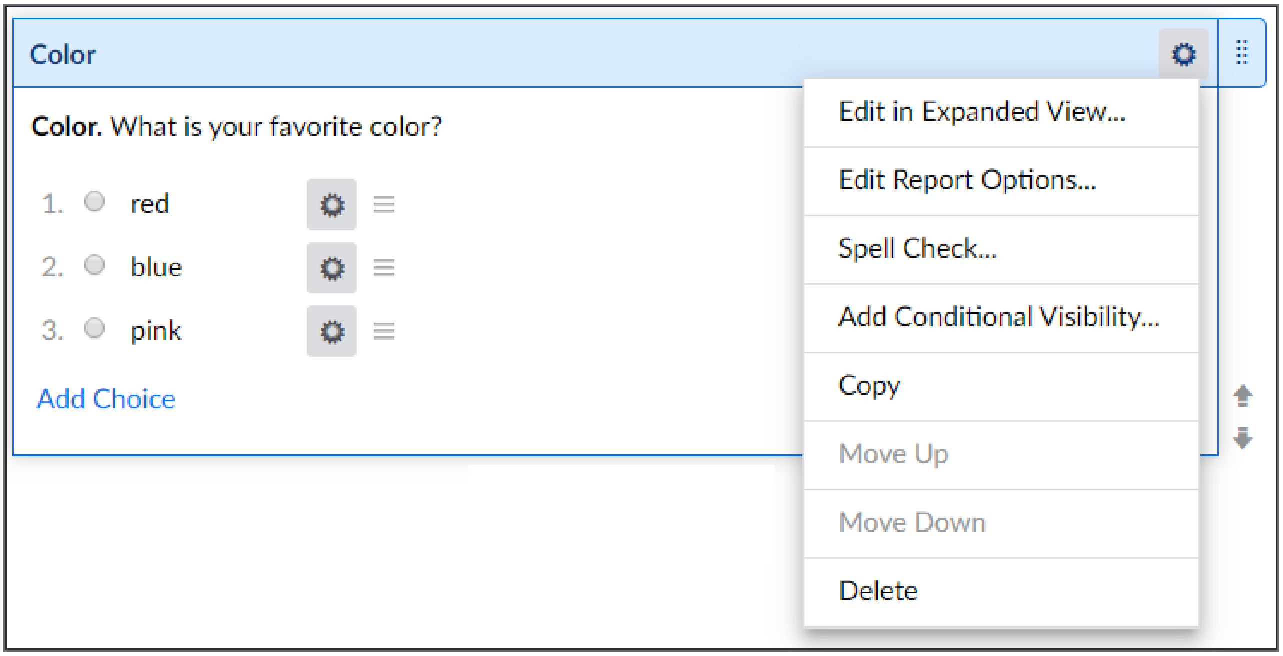
> This option is available for the **Rank Order**, **Drop & Drag Rank Order**, **Scale Slider**, and **Scrolling Matrix** questions only.

- Defining Advanced Table Properties, page 351 – Edit the advanced table properties such as layout, borders, and accessibility. For the **Modern** survey rendering mode, the borders and layout properties are not available.

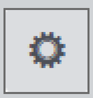
> This option is available for the **Matrix** and **Rank Order** questions only.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the next EFM releases, the **Classic** survey rendering will not be supported.

- Question Conditional Visibility, page 509 – Set the survey questions visibility to define whether certain questions are visible or hidden based on a set of predefined criteria.
- Copying and pasting questions, page 353 – Copy a question to paste it somewhere else within your survey.
- Moving questions up and down, page 354 – Change the position of a question by moving it up or down within your survey.
- Deleting questions, page 357 – Remove a question from your survey.

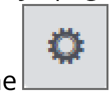


The question drop-down menu

The  menu is also available for other survey elements such as text blocks, code blocks, comments, and section headings.

Defining Advanced Table Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one with a **Rank Order** or **Matrix** question > click the  menu > click **Show Advanced Table Properties** > **Advanced Table Properties** dialog box.

The **Advanced Table Properties** option is available only for the **Rank Order** and **Matrix** questions. The **Advanced Table Properties** dialog box contains the following sections:

- **Borders**
- **Layout**
- **Accessibility**

Borders section

In the **Borders** section, you can define the borders of your table.

- **Border Rules** – Customize the borders of your table by applying the following rules:
    - **Blank** – Use the default theme-based borders with no special styling applied.
    - **Outline** – Use outside borders only. The outside borders are visible only if their width is defined and equals **1** or more.
    - **Groups** – Use outside borders and borders between groups of cells within your table.
    - **Rows** – Use outside borders and borders between rows.
    - **Columns** – Use outside borders and borders between columns.
    - **All** – Use outside borders and borders between rows and columns.
    - **Border Width** – Customize the depth of the outside border lines.

The **Border Width** option is disabled, if the **Border Rules** option is set to **Blank**.

Layout section

In the **Layout** section, you can define the table and column width properties.

- **Table Width** – Specify the width of the table in pixels or specify what percentage of the window size the table width should equal.

Setting a fixed table width may negatively impact the mobile experience of your survey in the **Modern** survey rendering mode.

- **Table Alignment** – Align the content in the table cells to the left or to the right or center it. This property may be overruled by the settings in the assigned theme.

For the **Modern** survey rendering mode, the **Table Alignment** option is enabled only when the **Table Width** value is specified.

- **Cell Padding** – Set extra space to separate cell walls from their contents.
- **Cell Spacing** – Set space between cells.
- **Width** – Specify what percentage of the table width the width of each column should equal. If the table width is not specified, the width of each column will be determined by its content.
- **Wrap** – If the width for the table columns is defined and the **Wrap** check box is selected for a particular column, the content in that column will be wrapped to fit the column width. If the width for the table columns is not defined and the **Wrap** check box is selected for a particular column, the content in that column will be wrapped to fit the minimum column width.

Accessibility section

In the **Accessibility** section, you can define the properties for labeling your question according to the Internet accessibility standards.

- **Summary** – Use this field to enter a summary statement.

The **Summary**option is available in the **Classic** survey rendering mode only.

- **Caption** – Use this field to enter a caption for your table. The caption appears between the question text and the table.

In the **Modern** survey rendering mode, caption is not displayed in the survey, but it is visible for screen readers.

Copying and pasting questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question that you want to copy and paste somewhere else within your survey.

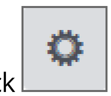
You can copy a question and paste it somewhere else within your survey.

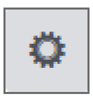
You can copy a question in your survey in the following ways:

- Copy and paste questions by using the drop-down menu, page 353
- Copy and paste questions by using the Copy Item link, page 353

Copy and paste questions by using the drop-down menu

Procedure

1 Go to the **Design** tab > **Content** tab, click a question or point to it, and then click  icon.

2 On the  menu, click **Copy**.
The **Paste** button appears next to each **Add** button within your survey.

3 Choose the appropriate location for the copied question, and then click **Paste**.

> You can also copy other survey elements such as text blocks, code blocks, comments, and section headings in a survey by clicking the  menu.

Copy and paste questions by using the Copy Item link

Procedure

1 Go to the **Design** tab > **Content** tab, select a question by clicking it.

2 Scroll down to the section below the **Question Options** panel, and then click **Copy Item**.
The **Paste** button appears next to each **Add** button within your survey.

3 Choose the appropriate location for the copied question, and then click **Paste**.

> The **Copy Item** link is not available for other survey elements such as text blocks, code blocks, comments, and section headings.

Moving questions up and down

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question that you want to move up or down.

You can change the order of your questions by moving them up or down.

You can move questions up and down within a survey in the following ways:

- Moving questions up and down by using the drop-down menu, page 354
- Moving questions up and down by using the up and down arrows, page 354
- Moving questions up and down by using the Up and Down links, page 354

Moving questions up and down by using the drop-down menu

Procedure

1. Go to the **Design** tab > **Content** tab, click a question or point to it, and then click icon.
2. On the menu, click **Move Up** to move the question up or click **Move Down** to move the question down.

> You can also move other survey items such as text blocks, code blocks, comments, and section headings up and down within your survey by clicking the icon.

Moving questions up and down by using the up and down arrows

Procedure

1. Go to the **Design** tab > **Content** tab, click a question or point to it.
   The up and down arrows appear in the editing area of the question.
2. Click the up arrow to move the question up, or click the down arrow to move the question down.

> You can also move other survey items such as text blocks, code blocks, comments, and section headings up and down within your survey by clicking the up and down arrows.

Moving questions up and down by using the Up and Down links

Procedure

1. Go to the **Design** tab > **Content** tab, select a question by clicking it.
2. Scroll down to the section below the **Question Options** panel.

3 Click **Up** to move the question up, or click **Down** to move the question down.

> The **Up** and **Down** links are not available for other survey items such as text blocks, code blocks, comments, and section headings.

Dragging questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question that you want to drag.

You can rearrange your questions within a survey by dragging them.

> The drag-and-drop functionality is also available for other survey items such as text blocks, code blocks, comments, and section headings.

Moving questions within a survey by dragging them

Procedure

1. Go to **Design** tab > **Content** tab, and then select a question by clicking it.

   The **Drag-and-drop** icon appears in the question heading area.

2. Point to the **Drag-and-drop** icon.

3. When the pointer becomes a four-headed arrow, drag the pointer to move the question to the appropriate location.

> You can also move a question by dragging its heading. The same applies to other survey items such as text blocks, code blocks, comments, and section headings.

Deleting questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question that you want to delete.

You can delete a question from a survey in the following ways:

- Delete questions by using the drop-down menu, page 357
- Delete questions by using the Delete Item link, page 357

> You can delete a question only when your survey is in the **Design** or **Test** mode and has not yet been opened. If the survey is in the **Open** mode, the **Delete** option is disabled.

Delete questions by using the drop-down menu

Procedure

1. Go to the **Design** tab > **Content** tab, and then click a question or point to it.
2. Click the menu, and then click **Delete**.
3. In the confirmation dialog box, click **Delete**.
   The question will be permanently removed from your survey.

> You can also delete other survey elements such as text blocks, code blocks, comments, and section headings from a survey by clicking the menu.

Delete questions by using the Delete Item link

Procedure

1. Go to the **Design** tab > **Content** tab, select a question.
2. Scroll down to the section below the **Question Options** panel.
3. Click **Delete Item**.
4. In the confirmation dialog box, click **Delete**.
   The question will be permanently removed from your survey.

> The **Delete Item** link is not available for other survey elements such as text blocks, code blocks, comments, and section headings.

Managing responses by using the drop-down menu

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new survey > **Design** tab > **Content** tab > select the question that you want to add to your survey > menu appears next to each response.

You can manage responses by clicking the menu that is available for each response within a question. The set of options available on the menu varies depending on the question type.

- Format question and response text in expanded editor, page 370 – Edit the response text in the expanded editor that provides additional editing options.
- Editing responses together, page 360 – Edit all responses at one go by using the **Edit Together** dialog box.
- Checking spelling, page 373 – Check the spelling in the response text.
- Add conditional visibility choices rows columns, page 512 – Set the conditional visibility for a choice to define whether certain choices are visible or hidden based on a set of predefined criteria.
- Adding responses to questions, page 361 – Pipe responses from the previous questions into the topics within the current question. This option is available for the **Rank Order**, **Drag & Drop Rank Order**, and **Scrolling Matrix** questions. For the **Matrix** question, the **Pipe in Rows** and **Pipe in Columns** options are available.
- Piping Responses, page 541 - Delete responses piped in the columns of your **Matrix** question from a previous question. This option is available only for the **Matrix** questions (on the menu at the column level).
- Add a choice list, page 363 – Insert a choice list from the library into the topics, rows, or columns within your question. This option is available for the following types of questions:
  - Choose One
  - Choose Many
  - Choose One with Image
  - Choose Many with Image
  - Matrix with a Choose One question as a side
  - Matrix with a Choose Many question as a side
- Piping in topics, page 539 – Insert a new choice immediately above the currently selected response. Depending on the question type, this option can read **Insert Topic, Insert Row,** or **Insert Column**. To cancel adding a new choice, press **Esc**.
- Move responses up and down, page 366 – Change the position of a response by moving it up or down within your question.

- Move responses left and right, page 367 – Change the position of a response by moving it left or right within your question. This option is available for the **Scale Slider, Scrolling Matrix**, and **Matrix** questions.
- Delete responses, page 369 – Remove a response from your question.

You can also set up the automatic permanent response deletion of all your responses for closed surveys after a fixed period of time on the **Configuration** tab > **Data Policies** tab > **Responses** tab > **Data Retention** section. To automatically delete all responses to the Recycle Bin, go to the **Responses** tab > **Automation** section.

Editing responses together

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new survey > **Design** tab > **Content** tab > select the question responses of which you want to edit.

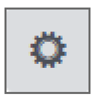
With the Edit Together feature, you can edit all responses within your question at one go by using a variety of formatting options.

In the **Edit Together** dialog box, you can also check all responses within a question for spelling mistakes and view the total number of words in the responses. You can also add responses to a question by using the **Edit Together** dialog box.

> The Edit Together feature is not available for the image-based responses.

Procedure

1 Go to **Design** tab > **Content** tab, select a question.

2 Click the  menu next to any of the responses within the question, and then click **Edit Together**.

> To avoid entering the insecure code into the **Edit Together** dialog box, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box and ensure that the **Edit Code Blocks** permission is cleared. For more information, see General Setup, page 1406.

3 If needed, add more responses to the question.

> Place each response on a separate line by pressing the **Enter** key.

4 Customize your responses by using the editing toolbar.

> You can point to any icon on the editing toolbar to see its label. The set of editing options varies slightly depending on the question type.

5 Save the changes.

Adding responses to questions

Navigation

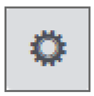
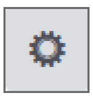
Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question that you want to add a response.

You can add a response to your question (if needed).

> You can add responses only to the questions that have not been published yet.

Adding responses by using the drop-down menu

Procedure

1. Go to **Design** tab > **Content** tab, click a question or point to it.
2. Click the  menu next to the response above which you want to add a new response.
3. On the  menu, click **Insert Choice**.
   A new response is inserted immediately above the currently selected response.
   To cancel adding a new response, press **Esc**.

> Depending on the question type, the **Insert Choice** option can become **Insert Topic**, **Insert Row**, or **Insert Column**.

Adding responses by using the Add Choice link

Procedure

1. Go to **Design** tab > **Content** tab, click a question.
2. Click the **Add Choice** link below the responses.
   A new response line is added at the end of the response list.
   To cancel adding a new response, press **Esc**.

Depending on the question type, the **Add Choice** link can become **Add Topic** or **Add Row**.

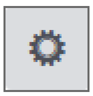
Add a choice list

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new survey > **Design** tab > **Content** tab > select the question that you want to add to your survey.

You can insert a choice list from the library into the columns of your **Choose One**, **Choose Many**, **Choose One with Image**, **Choose Many with Image**, **Scale Slider**, **Scrolling Matrix**, or **Matrix** question.

Procedure

1. On the **Design** tab, on the **Content** tab, click a **Choose One**, **Choose Many**, **Choose One with Image**, **Choose Many with Image**, **Scale Slider**, **Scrolling Matrix**, or **Matrix** question.
2. On the  menu, next to each choice or column within the question, click **Add from Library**.
3. In the **Add Choice List** dialog box, select the choice list that you need, and then click **OK**.

> The items from the choice list are added as additional columns or choices to the already existing columns or choices in your question.
> For the information on how to create a choice list in the library, see Library Choice Lists tab, page 1277.

Related topics

Piping in topics

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > click a question > click  icon > **Pipe in Topics** option.

You can insert responses from any **Choose Many**, **Choose Many with Image**, **Matrix**, or **Scrolling Matrix** question into the topics, rows, or columns of a later question in your survey. The corresponding images are also piped in the target questions provided that they support images.

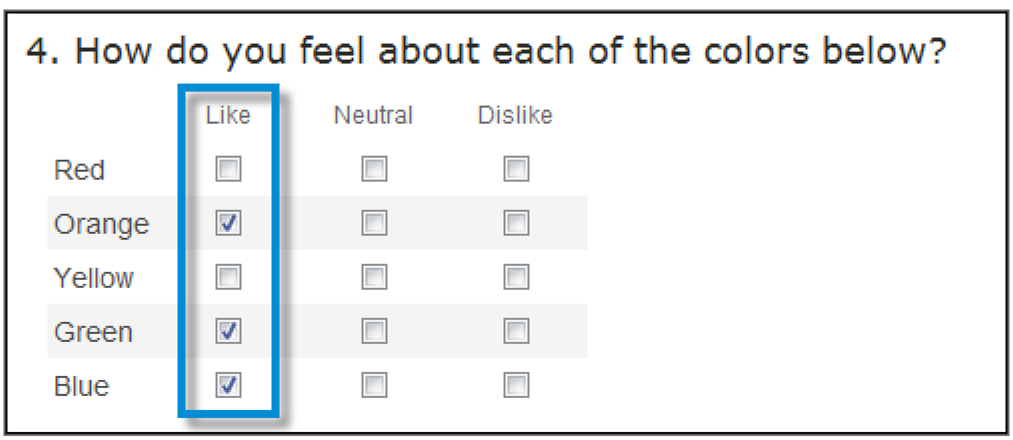
The Piping functionality requires that the source and target questions are separated by a page break.

You can pipe responses into the questions of the following types:

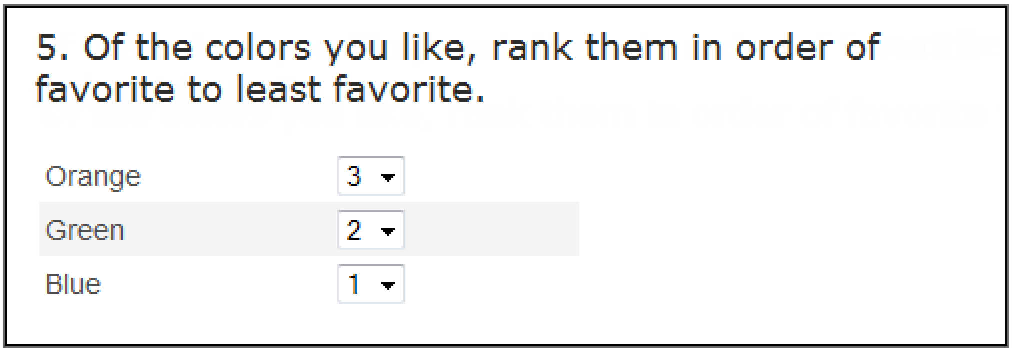
- **Matrix** (does not support responses with images)
- **Drag & Drop Rank Order**
- **Rank Order** (does not support responses with images)
- **Scrolling Matrix**

If you pipe the respondent's answers, you cannot add any additional responses.

Example: The respondent answers a question, and then the selected responses are piped into the next question.



The source question



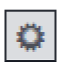
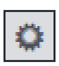
The destination question

Piping choices and topics

Procedure

1. Go to the **Design** tab > **Content** tab, add a **Matrix** question.
2. Insert a page break.
3. Add a **Rank Order** question.

> To prevent validation that the piping cannot meet, indicate that the respondent must rank all topics in your **Rank Order** or **Drag & Drop Rank Order** question.

4. Click the  icon next to any topic in the **Rank Order** question.
5. On the  menu, click **Pipe in Topics**.
6. In the **Piped Choices** dialog box, select the column of the **Matrix** question that you want to use for piping.
7. Indicate whether to pipe **Selected** or **Not Selected** responses.
8. Click **OK**.
   A placeholder is inserted instead of the topics.

> Click the **Clear Piping** link below the topics to remove the piped responses. For the columns of the **Matrix** questions, the **Clear Piping** option is available on the  menu at the column level.

Move responses up and down

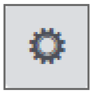
Navigation

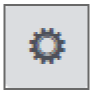
Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question responses of which you want to move up or down.

You can change the order of your responses within a question by moving them up or down.

Procedure

1 Go to **Design** tab > **Content** tab, and then select a question.

2 Click the  icon next to the response that you want to move up or down.

3 On the  menu, click **Move Up** to move the response up or click **Move Down** to move the response down.

> You cannot move responses up and down within the questions if your survey is in the **Open** mode.

Move responses left and right

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one with a **Scale Slider**, **Scrolling Matrix**, or **Matrix** question > select the **Scale Slider**, **Scrolling Matrix**, or **Matrix** question responses of which you want to move left or right.

You can change the order of responses within the **Scale Slider**, **Scrolling Matrix**, or **Matrix** questions by moving them left or right.

Procedure

1 Go to **Design** tab > **Content** tab, select a question.

2 Click the icon next to the response that you want to move left or right.

3 On the menu, click **Move Left** to move the response left or click **Move Right** to move the response right.

You cannot move responses left and right within the questions if your survey is in the **Open** mode.

Dragg responses within a question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question responses of which you need to reorder.

You can rearrange the responses within your question by dragging them.

Procedure

1 Go to **Design** tab > **Content** tab, select a question.

The drag-and-drop icon appears on each response line.

2 Point to the appropriate drag-and-drop icon.

3 When the pointer becomes a four-headed arrow , drag the pointer to move the response to the appropriate location.

You cannot move responses within the questions if your survey is in the **Open** mode.

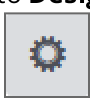
Delete responses

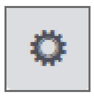
Navigation

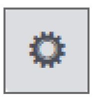
Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > select the question responses of which you want to delete.

You can delete a response from your question if needed.

Procedure

1 Go to **Design** tab > **Content** tab, select a question.
The  menu icon appears next to each response within this question.

2 Click the  menu next to the response that you want to delete.

3 On the  menu, click **Delete**.
The response is removed from the question.

You cannot delete responses within the questions if your survey is in the **Open** mode.

You can also set up the automatic permanent response deletion of all your responses for closed surveys after a fixed period of time on the **Configuration** tab > **Data Policies** tab > **Responses** tab > **Data Retention** section. To automatically delete all responses to the Recycle Bin, go to the **Responses** tab > **Automation** section.

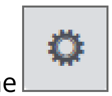
Format question and response text in expanded editor

Navigation

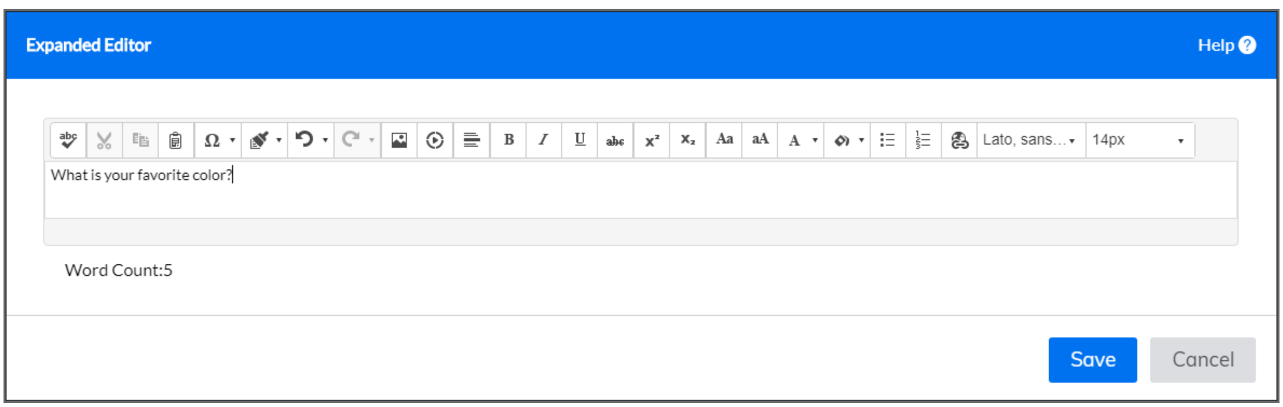
Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one > **Content** tab > select the question that you want to edit in the expanded view.

The **Edit in Expanded View** feature is available for all question types. Other survey elements such as text blocks, section headings, and end pages can also be formatted by means of the expanded editor. For comments and code blocks, the expanded editor provides a limited set of editing options.

Procedure

1. Go to **Design** tab > **Content** tab, click a question or response text.
2. To open **Expanded Editor**, click the  icon in the upper-right corner of the question or response, and then select **Edit in Expanded View**, or click the **More** icon .
3. Customize your question or response text by using the editing toolbar in the expanded editor. The set of editing options in the expanded editor varies depending on the question type.

> The **Media Manager** button is hidden in the editing toolbar of he **Expanded Editor** dialog box if the **Automatically remove insecure code from survey designer** check box is selected and the **Edit Code Blocks** permission is cleared. For more information, see General Setup, page 1406.



The Expanded Editor dialog box

> For comments and code blocks, the following options are available within the expanded editor: Undo, Redo, Cut, Copy, Paste, and Insert Piped Value.

Edit report options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > select a question that you want to edit > menu > click **Edit Report Options**.

You can set the report and export values for question choices to use these values later for reporting.

> To avoid entering the insecure code in the **Edit Report Options** dialog box, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box and ensure that the **Edit Code Blocks** permission is cleared. For more information, see General Setup, page 1406.

When you change the report values, it updates the calculations in report elements that use this question. When you change the export values, it updates the exported values when you export the responses from this question.

> You can change the question report and export values when designing a survey or after its publishing.

The **Edit Report Options** feature is available for the following question types:

- Choose One
- Choose One with Image
- Choose Many
- Choose Many with Image
- Matrix with the Choose One and Choose Many sides
- Rank Order
- Scale Slider
- Scrolling Matrix

> For the **Choose One** and **Choose One with Image** questions, when the report value or export value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

Procedure

1. On the **Surveys** tab, open an existing survey or create a new one.
2. On the **Content** tab, select the question, the report options of which you want to edit.
3. On the menu of the question, click **Edit Report Options**.
4. In the **Edit Report Options** dialog box, set the report and export values for each question choice.

For a **Matrix** question, you can switch between the topics and sides using the **Matrix Section** list. When you switch between the sides, all changes are remembered.

5 Click **Save**.
The report and export values are set to be used for reporting on this question.

Checking spelling

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select the question that you want to check.

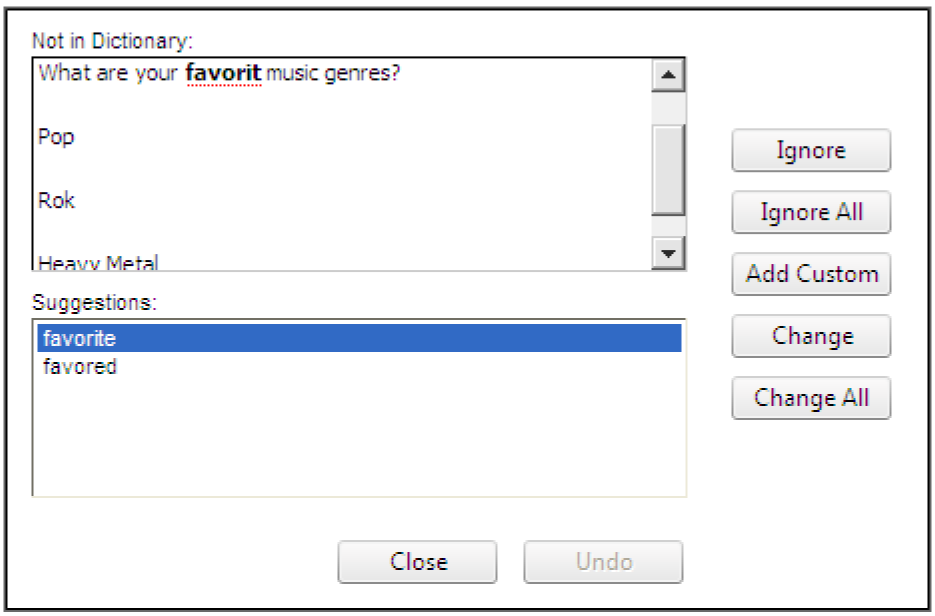
You can choose to check the spelling in the entire survey at one go or to check the spelling in each field with question text or response text separately.

- Checking spelling in the entire survey, page 373
- Checking spelling in the question text, page 374
- Checking spelling in the response text, page 374
- Checking spelling in the End Page text, page 374

Checking spelling in the entire survey

Procedure

1 On the **Advanced** tab of the **Design** tab, click the **All Survey Spell Check** link.
The **Spell Check** dialog box opens.



The Spell Check dialog box

> In the **Not in the Dictionary** section, the word that is not found in the EFM dictionary is highlighted in bold. In the **Suggestions** section, all possible spelling variations of the missing entry appear.

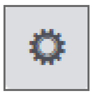
2 Manage the missing entries by using the following options:

- **Ignore** – Ignore the highlighted entry and proceed to the next entry.
- **Ignore All** – Ignore all occurrences of the entry during the current spelling check.
- **Add Custom** – Add the entry to the custom dictionary.
- **Change** – Replace the entry with the highlighted suggestion or save the changes that you have made manually in the **Not in Dictionary** section.
- **Change All** – Replace all occurrences of the entry with the highlighted suggestion or with the word that you have entered manually in the **Not in Dictionary** section.

3 Click **OK** when you complete the spelling check.

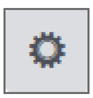
Checking spelling in the question text

Procedure

1 On the **Content** tab of the **Design** tab, click a question or point to a question.
The  menu appears in the question heading area.
2 On the menu, click **Spell Check** to check the spelling in the question text only.
3 In the **Spell Check** dialog box, manage the missing entries as appropriate.
4 Click **OK** when you complete the spelling check.

Checking spelling in the response text

Procedure

1 On the **Content** tab of the **Design** tab, click a question.
The  menu appears for each response within this question.
2 Click the icon next to the response text that you want to check for spelling mistakes.
3 On the menu, click **Spell Check**. The **Spell Check** dialog box opens.
4 In the **Spell Check** dialog box, manage the missing entries as appropriate.
5 Click **OK** when you complete the spelling check.

Checking spelling in the End Page text

1 On the **Pages** tab of the **Design** tab, select the end page you want to check for spelling mistakes.
The **Design End Page** dialog box opens in the expanded view.
2 Click the **Spell Check** icon  on the toolbar of the expanded editor.
The spell checking mode turns on.
3 Manage the missing entries as appropriate.
4 Click **OK** when the spell check is complete.
5 Click **Save**.

You can also use the **Spell Check** option in the **Expanded Editor** to check the questions and responses text for spelling mistakes.

Create a list in the question

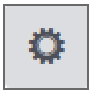
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > select a question that you want to edit in the expanded view.

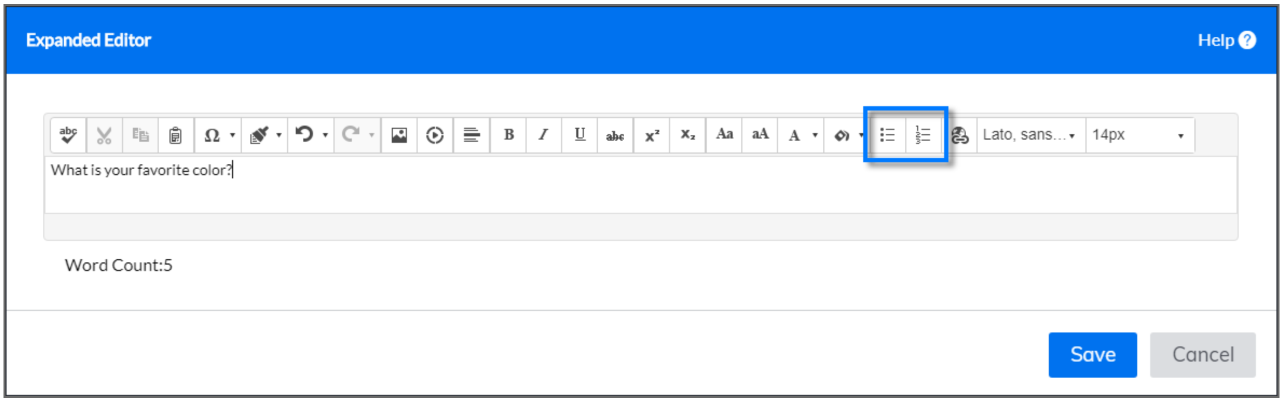
You can create bulleted and numbered lists in your question using the corresponding options in **Expanded Editor** dialog box.

Procedure

1 On the **Content** tab of the **Design** tab, select the question that you want to add.

2 In the  menu of the question, click **Edit in Expanded View**.

3 In the **Expanded Editor** dialog box, click the **Bullet List** or **Numbered List** icon to format your question text as needed.



The Expanded Editor dialog box

4 Click **Save**.

How to test your survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** view > **Test** button.

You can test your survey while you are in **Design** mode. In addition, you can test logic, branching, formats, and response collection within the testing window. Data collected from respondents is available for exporting and reporting.

Testing a survey is available by clicking the **Test** button in the **Design** view.

Test mode allows the greatest range of features to be accessed during the survey design process. You can test your survey in every way possible, modify it if required, and test again until you are satisfied. You can test a survey as frequently as you want with no impact on the mode or on the live production version of the survey. You should test all survey features before you open the survey. Test mode allows switching between the three device type options without exiting **Test** mode.

> When a survey is republished or opened, all test data is deleted.

There are the following device type options available:

- Desktop
- Tablet
- Mobile

You can find the device type icons in the upper-right corner of the **Testing Your Survey** window.

The **Auto** option is the default device type option of a survey opened using a certain device.

> To enable different device type options in **Test** mode, select the **Generate Mobile HTML** check box on the **Properties** tab.

For multiple-campaign surveys, the campaigns are tested in the following order:

1. Survey Link, Social Media, and Offline Device campaigns
2. Email List or Panelist campaign (the campaign that was added last is tested first)

How to test your survey

Procedure

1. On the **Design** tab, click the **Test** button.
   The **Test Your Survey** dialog box opens.
2. Click **OK**.

> When you click **OK**, a new version of the survey is created for testing. All data for the previous test version of the survey is deleted.

3. In the **Testing Your Survey** window, test your survey and make appropriate changes if required.
   You can copy and paste the survey testing URL if needed.

Survey publishing workflow overview

Navigation

Administration tab > **Users** tab > click the name of the user that you want to edit.

The target audience for this topic is administrators.

Before a survey is opened, some organizations for the survey and invitation content need to be reviewed and approved by someone other than the author (for example, manager, marketing representative, legal department, other) before the survey becomes externally available.

Users who require approval to activate a survey are referred to as **Assisted Survey Authors**. Users who have the ability to approve surveys are called **Reviewers**. These user roles are set by your Administrator per user. An **Assisted Survey Author** is not be able to open a survey without a **Reviewer** approving the content first.

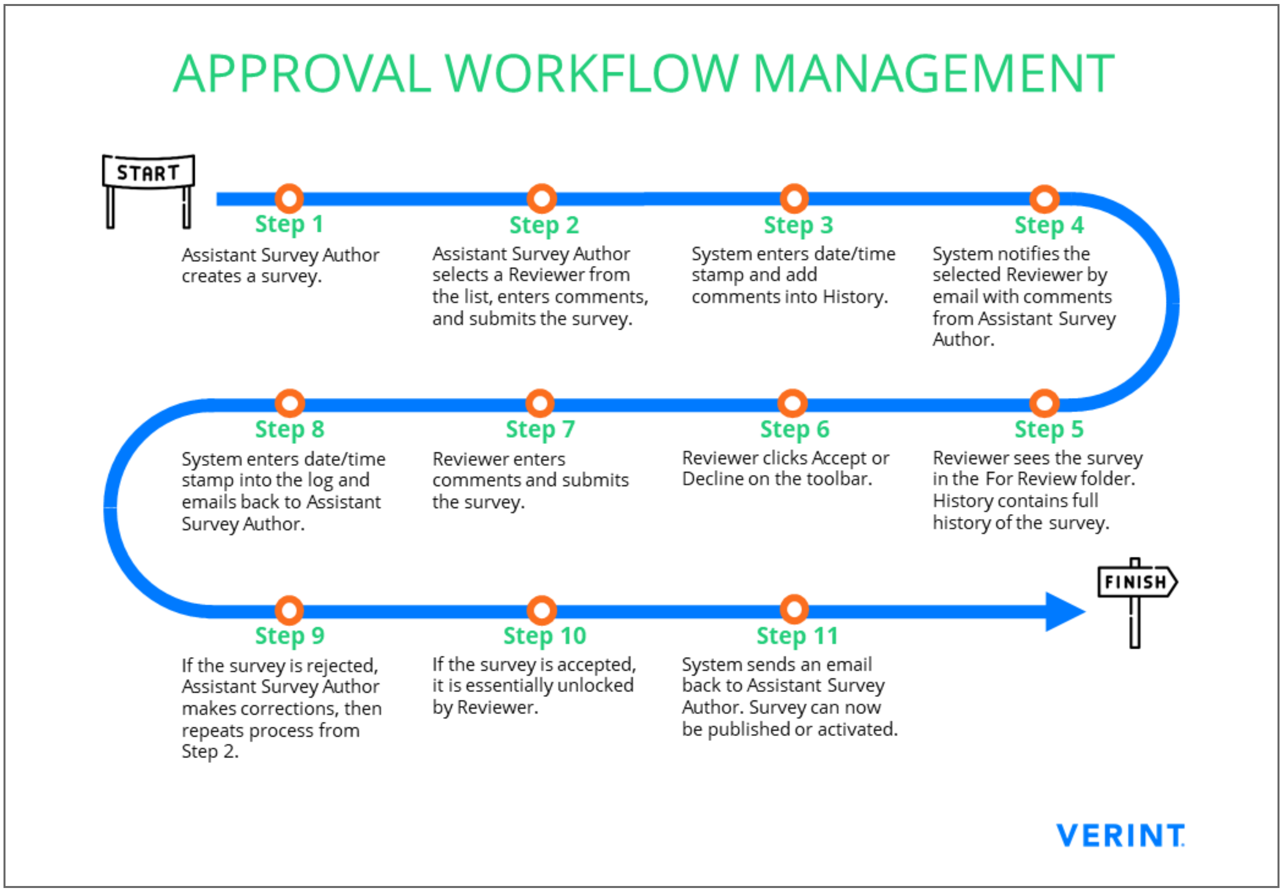
The **Reviewer Status** menu in the **Edit User** dialog box > **Workgroup** tab allows an Administrator to select the appropriate workflow assignment for the user. The options include:

- **Assisted Survey Author** – A user that has rights to create and edit a survey, but cannot open a survey until it is approved by a Reviewer. That Assisted Survey Author user must send their survey to one or more Reviewer users for survey publish workflow approval.
- **Standard Survey Author** – A user that is mapped to the Survey author default role.
- **Survey Author with Reviewer Access** – A user that has the Reviewer permission enabled. This Reviewer is mapped to, and have survey publish authority on behalf of the Assisted Survey Author.

Approval process workflow

An **Assisted Survey Author** is a user who has the ability to create and edit a survey but cannot open it. Assisted Survey Authors require approval from assigned Reviewers within their organization before publishing a survey.

The diagram below depicts the survey approval process for an **Assisted Survey Author**.



The survey approval process

Submit a survey for review

Navigation

Design & Collect tab > **Surveys** tab > click the title of a survey > **Collect** tab.

An **Assisted Survey Author** can submit the survey for review. After that, a system generated email is sent to the specified Reviewer.

Procedure

1. On the **Collect** tab, choose how to collect your survey results.
2. In the **Open Survey** window, click the **Open Survey Now (*)** button.
3. In the **Submit for Review** dialog box, on the **Submit** tab, in the **Reviewer to Notify** menu, choose the **Reviewer**.
4. Add comments, and click the **OK** button.

> When the message is received and accepted by the **Reviewer**, the survey is moved to the **For Review** folder and is locked from further editing.

Reviewing a survey

Navigation

Design & Collect tab > **Surveys** tab > **For Review** folder > **Actions** menu.

When a survey is sent to a **Reviewer** by an Assisted Survey Author, the survey is displayed in the **For Review** folder. Reviewer must decide whether to accept or decline the survey.

Workflow

1 Reviewers can accept or decline the survey submitted by the Assisted Survey Author.

The **Accept** and **Decline** options are available on the **My Surveys** page, in the **Actions** menu .

2 If **Accept** is selected, the **Accept Survey** dialog box appears.

a. The Reviewer adds comments, and clicks **OK**.

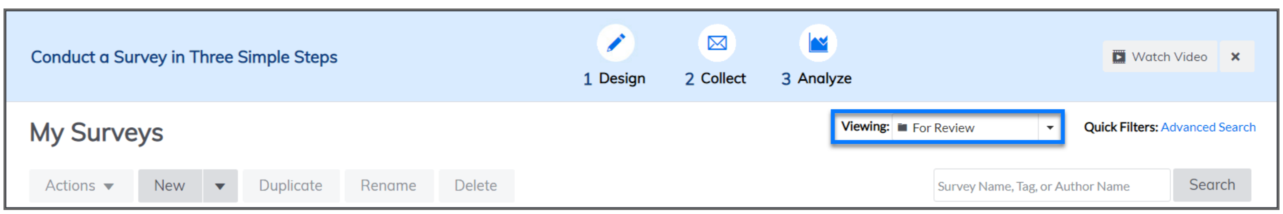
These comments become part of the **History**.

b. After the Reviewer added comments, a system-generated email message is sent back to the Assisted Survey Author with the updated status and comments entered by the Reviewer.

c. The survey is removed from the **For Review** folder and placed in the **My Surveys** folder of the Assisted Survey Author.

The survey is unlocked for editing and the action that required the review (such as **Open** or **Reopen a Survey**) no longer has the asterisk (*) associated with it.

d. If a survey that has already been accepted is modified, it has to be submitted for approval again.



The For Review folder

3 If **Decline** is selected, a system-generated email is sent to the Assisted Survey Author.

a. The survey is removed from the **For Review** folder and placed in the appropriate user folder.

b. The action needs to be resubmitted when new changes are made.

4 An Assisted Survey Author can also withdraw the survey from review to unlock the survey for editing and resubmission.

The **Withdraw from Review** option is available on the **My Surveys** page, in the **Actions** menu.

Unlocking a survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey accepted by reviewer or submitted for review > **Design** view > **Unlock Survey** button.

The Assisted Survey Author and Reviewer can view a survey (approved or waiting for review) so that they can easily verify it without restarting the survey approval process. When a survey is submitted for review, accepted by Reviewer, or published, the **Edit** mode is disabled, and the survey is locked. Still, the Reviewer can scroll and navigate through the pages of the locked survey. During the survey approval process, the Assisted Survey Author can only edit the survey declined by the Reviewer.

You can unlock the survey by clicking the **Unlock Survey** button on the toolbar in the survey designer.

The Unlock Survey button in the survey designer

Unlocking the survey restarts the survey approval process. The Assisted Survey Author needs to send the survey for approval again.

Pages Page

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

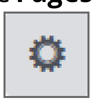
You can manage blocks and pages within your survey by using the **Pages** page.

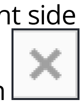
All survey pages are included into blocks. Each page can be included only in one block.

The surveys created prior to the 15.1 release are updated to place all pages that previously were not in blocks into blocks. The block numbers are changed correspondingly. For example, the survey that previously contained Page 1, Page 2, and Block 1 with Page 3 and Page 4 changes to Block 1 containing Page 1 and Page 2, and Block 2 containing Page 3 and Page 4.

Each block has a block number and an editable block name. You can expand and collapse each block by using the arrow to the left of the block name. All blocks are expanded by default to present the pages they include.

Each page in the block is displayed as a separate bar with a page number and an editable page name. To view the content of each page, you can expand a page bar by using the arrow to the left of the page name. Each item on the page is displayed as a separate bar with the question heading and question text for questions and text content for non-questions. The item type is specified to the right of the item bar.

On the **Pages** page, you can perform the following actions on the blocks by using the block drop-down menu  to the rightmost of the block bar:

- **Add Block** – Add a new block to your survey. The added block is empty. For more information, see Add block, page 390.
- **Add Page Block from Library** - Add a page block to your survey. This option is not available in the block drop-down menu. For more information see Add page block, page 391.
- **Hide This Block** – Hide the current block from the survey respondents. After clicking the option, the visibility icon  is displayed on the right side of the block bar. To make the block visible again, in survey designer, click the delete icon  to the rightmost of the visibility status bar.

> If the survey distribution method is **Require a Passcode**, the **Hide this block** option is unavailable for the first block in the survey.

- **Add Conditional Visibility** – Add or edit the block visibility criteria. For more information, see Add conditional visibility for block, page 506.
- **Add Branch** – Add branching to your survey. For more information, see Adding Branching Criteria, page 442.
- **Add Page Rotation** – Make pages in the current block appear in a rotated order in your survey. For more information, see Blocks and Page Randomization, page 403.
- **Add Page Randomization** – Make pages in the current block appear in a randomized order in your survey. For more information, see Blocks and Page Randomization, page 403.
- **Add Block Rotation** – Make child blocks in the current block appear in a rotated order in your survey. For more information, see Blocks and Page Randomization, page 403.

- **Add Block Randomization** – Make child blocks in the current block appear in a randomized order in your survey. For more information, see Blocks and Page Randomization, page 403.

> The **Add Block Rotation** and **Add Block Randomization** options are available only for the blocks that contain child blocks.

- **Copy** – Copy the current block. For more information, see Copy and paste block, page 393.
- **Paste** – Paste the previously copied block into your survey. The block is added after the current block. For more information, see Copy and paste block, page 393.
- **Move Block Up** – Move the current block one position towards the beginning of the survey.
- **Move Block Down** - Move the current block one position towards the end of the survey.

> The **Move Block Up** option is unavailable if the current block is in the first position of the survey. Similarly, the **Move Block Down** option is unavailable if the current block is in the last position of the survey.

- **Delete Block** – Delete the current block from the survey. For more information, see Delete block, page 392.

On the **Pages** page, you can perform the following actions on the pages by using the page drop-down menu to the rightmost of the page bar:

- **Add Page** – Add a new page to your survey.
- **Add Custom End Page** – Create a custom end page in your survey. When saved, this custom end page appears on the **Pages** page of the **Design** tab. For more information, see End Pages Pagination Panel, page 396.
- **Hide This Page** – Hide the current page from the survey respondents. After clicking the option, the visibility icon is displayed on the right side of the page bar. To make the page visible again, in survey designer, click the delete icon to the rightmost of the visibility status bar.
- **Add Conditional Visibility** – Add or edit the page visibility criteria. For more information, see Page Conditional Visibility, page 502
- **Add Branch** – Add branching to your survey. For more information, see Adding Branching Criteria, page 442.
- **Copy** – Copy the current page. For more information, see Copying and pasting pages, page 387.
- **Paste** – Paste the previously copied page into your survey. The page is added after the current page. For more information, see Copying and pasting pages, page 387.
- **Move Page Up** – Move the current page one position towards the beginning of the survey.
- **Move Page Down** – Move the current page one position towards the end of the survey.

> The **Move Page Up** option is unavailable if the current page is in the first position of the block. Similarly, the **Move Page Down** option is unavailable if the current page is in the last position of the block.

- **Delete Page** – Delete the current page from the survey.

Open a page

Procedure

1 On the Design tab, click the **Pages** page icon .

2 On the **Pages** page, navigate to the page you want to open and point to the text indicating the number of questions on the page. The text turns to the **Go to Page** link.

3 Click the **Go to Page** link.

Edit the block or page name

Procedure

1 On the **Design** tab, click the **Pages** page icon .

2 On the **Pages** page, click the block or page name you want to edit

3 In the text field, edit the block or page name. The default block or page name is *Untitled*.

> To cancel the changes, press **Esc**.

4 Press **Enter** to save the changes.

Pages Page tree view

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

On the **Pages** panel, you can switch the pages view between **Thumbnails** and **Tree**. The **Tree** view shows the question and answer level information on each page in your survey. In addition, you can rename and delete pages in the **Tree** view using a shortcut menu.

Thumbnails is the default view of survey pages. To see the page's hierarchical structure, click the **Tree** icon on the **Pages** panel.

To view the question headings on a certain page, click a black arrow next to that page to expand it. You can expand or collapse all pages and view their content by clicking the **Expand All** or **Collapse All** options respectively.

To view the answers for a certain question, click an arrow next to the question heading.

When you click the page, question heading, or answer on the **Pages** panel, it displays in the survey content area.

Delete a page

Procedure

1 On the **Design** tab, click the **Pages** panel icon .
The **Pages** panel opens.

2 On the **Pages** panel, click the **Tree** view icon.

3 Select the page you want to delete. Click **Delete Page**.

You can delete a question the same way as a page. For more information on managing pages within your survey, see Pages Page, page 383.

Copying and pasting pages

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

You can copy entire page to duplicate questions in bulk. The pasted page has all survey questions from the copied page except for the profile questions. The branching and conditional logic is not copied.

The name of the pasted page is <copied page name> (1) for a page that is pasted once, <copied page name> (2) for a page that is copied and pasted twice, etc. You can rename the pasted pages.

Copy Pages

Procedure

1. On the **Pages** panel, select the page you want to copy.
2. On the drop-down menu, click the **Copy** option. The **Paste** option becomes available.
3. Click the **Paste** option. The page is inserted after the copied page.

You can access the same functionality from the block drop-down menu on the **Content** tab of the survey designer.

Copying and pasting pages between surveys

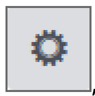
Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

You can copy a page from one survey to another survey. The pasted page has all survey questions from the copied page except for the profile questions. The branching and conditional logic is not copied. The name of the pasted page is <copied page name> (1) for a page that is pasted once, <copied page name> (2) for a page that is copied and pasted twice, etc. You can rename the pasted pages.

Copy and paste pages between surveys

Procedure

1. On the **Pages** panel, select the page you want to copy.
2. In the drop-down menu , click the **Copy** option. The **Paste** option becomes available.
3. Navigate to the survey you want copy the page to.
4. On the **Pages** panel, click the page after which you want to insert the copied page.
5. Click the **Paste** option. The page is inserted.

> You can also copy and paste pages by using the corresponding options in the page drop-down menu in the header of the survey content area.

Drag pages

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

You can rearrange pages within a survey by dragging them. You can also drag your questions within a survey following the same procedure.

> You cannot drag a page to a block that contains child blocks.

Procedure

1 Navigate to the **My Surveys** tab.

2 In the **Design** view of the survey designer, click the **Pages** tab.

3 On the **Pages** page, expand the **Block** section.

4 In the **Block** section, click in the needed page.

5 Drag the page to the appropriate location.

> When dragging a page over a collapsed block, the page is added to the end of the block. If you hover over the block for a second, it is automatically expanded. Similarly, when dragging a question over a collapsed page, a question is added to the end of the page. If you hover over the page for a second, it is automatically expanded.

Add block

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > icon.

You can add new blocks to your survey to create a questionnaire that meets your needs to the full.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Contact us, page 50.

Procedure

1. On the **Design** tab of the survey designer, click the **Pages** tab.
2. On the **Pages** page, do the following:
   - To add another block to your survey, click the **Add Block** option below the last block bar. The new block is added after the last survey block.

> You can access the same functionality from the block menu on the **Pages** or **Content** tabs of the survey designer.

In **Modern** survey rendering mode, to add a child block to your block, click the **Add Block** link at the bottom of the block bar.

> The **Add Block** link is not available for the blocks that contain pages. For more information, see Blocks within blocks, page 407.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

3. In the **Name Your Block** dialog box, enter a name for your new block. The default block name is Untitled.
4. Click **OK**.

The new empty block is added after the current block. You can drag pages from other blocks to your block or add new pages.

If you add a new block from the survey designer, the new block splits the current block with all its pages starting from the current one moving to the new block. For example, if you add a new block from the second page of the block with 4 pages, the added block will include the second, third, and fourth pages of the previous block; and the previous block will preserve only its first page.

> In the survey designer, the **Add Block** option is unavailable for the first page of each block. You need to have at least two pages in your block to be able to add a new block after it.

Add page block

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > **Add Page Block from Library**.

You can add page blocks to your survey which contain groups of multiple questions. This allows you to design your survey quickly and efficiently.

Procedure

1. On the **Design** tab of the survey designer, click the **Pages** tab.
2. On the **Pages** page, click the **Add Page Block from Library** option below the last block bar to add the new block after the last survey block.
3. In the **Insert Item** dialog box > **Page Blocks** tab, blocks are sorted by categories.
4. In the **Categories** list, select the category with the page block that you want to insert.
5. In the **Blocks** list, select the block you wish to add.

   Block preview is available in the right pane.
6. Click **OK**.
   The selected page block is added to your survey.

> Conditional visibility logic can be applied only to Pages and Question Types which are within the same page block. Applying this logic across multiple page blocks is not supported.

Delete block

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > icon.

You can delete the whole block from your survey at a time or merge its pages with another block without having to delete individual pages.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Contact us, page 50.

Procedure

1. In the **Design** view of the survey designer, click the **Pages** tab.
2. On the **Pages** page, in the block drop-down menu to the rightmost of the block bar, click **Delete Block**.

> You can access the same functionality from the block drop-down menu on the **Pages** or **Content** tabs of the survey designer.

3. In the **Delete Block** dialog box, select one of the following options:
   - **Delete block content (All N page(s) and their content will be deleted)**. – Deletes the current block with all its content. This is the default option.
   - **Merge block's content with previous block** – Deletes the current block and inserts all its child blocks and pages at the end of the previous block.
   - **Merge block's content with following block** – Deletes the current block and inserts all its child blocks and pages at the beginning of the following block.
4. Click **OK**.

When deleting a parent block that is the only block in the survey, the options in the **Delete Block** dialog box are the following:

- **This container will be removed. All child blocks will be preserved**. – Deletes the parent block and preserves all its child blocks. This is the default option.
- **Delete block content (All N page(s) and their content will be deleted)**. – Deletes the parent block with all its content and creates a new empty block in the survey.

Copy and paste block

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > icon.

You can copy an entire block to duplicate pages in bulk. The pasted block contains all pages and questions from the copied block, except for the profile questions. The branching and conditional logic is not copied. The name of the pasted block is <copied block name> (1) for a block that is copied and pasted once, <copied block name> (2) for a block that is copied and pasted twice, and so on. You can rename the pasted blocks.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Contact us, page 50.

In **Modern** survey rendering mode, you can also copy a child block into a parent block containing at least one child block.

> To copy a child block into a parent block, make sure you use the child blocks' drop-down menus both for the **Copy** and **Paste** options.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Procedure

1. In the **Design** view of the survey designer, click the **Pages** tab.
2. On the **Pages** page, in the block drop-down menu to the rightmost of the block bar, click **Copy**.

   The block contents is copied to the clipboard.

> Only one block can be copied to the clipboard at a time. Any previously copied block is overwritten.

3. In the block drop-down menu, click **Paste**. The duplicate of the copied block is inserted after the current block.

> You can access the same functionality from the block drop-down menu on the **Pages** or **Content** side tabs of the survey designer.

You can also use the **Copy** and **Paste** options to copy blocks from one survey into another. A block copied to the clipboard is available for pasting into other surveys as long as the EFM session is active.

Drag blocks

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > icon.

You can rearrange blocks within a survey by dragging them.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Verint Resources, page 50.

In **Modern** survey rendering mode, you can also drag a block into another block.

> You can drag a block only into a block which is empty or which contains other child blocks (you cannot mix blocks and pages in a block.)

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Procedure

1. Navigate to the **My Surveys** tab.
2. On the **Design** tab of the survey designer, click the **Pages** tab.
3. On the **Pages** page, click in the needed block.
4. Drag the block to the appropriate location.

> When dragging a block over a collapsed block, the child block is added to the end of the block. If you hover over the collapsed block for a second, it is automatically expanded.

End Pages Pagination Panel

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > **End Pages** section.

You can create a wide range of end pages for your survey. You can also edit, test, and delete your end pages using the end page drop-down menu on the corresponding end page bar.

> Available types of end pages vary based on the survey settings and survey distribution method you select. For more information, see the end pages description below.

From the **End Pages** section on the **Pages** tab, you can add the following end pages to your survey:

- **Survey Completed** – This page appears when a respondent completes the survey and clicks the **Submit** button.

  Example

  Thank you for completing this survey.

- **Survey Saved** – This page appears when a respondent saves the survey to complete it later and clicks **Save**. By default, this page provides the URL for a respondent to access the survey again and complete it. You can provide the survey URL using the *%URL%* placeholder. When a respondent takes the survey and saves it, the *%URL%* placeholder is replaced with the survey URL.

  Example:

  Your responses to the survey have been saved.
  Save the following link to complete the survey later.
  %URL%

> The **Survey Saved** end page is shown in the **End Pages** section only if the **Save** button is selected on the **Formatting** tab.

- **Branched Out** – This page appears when a respondent does not meet the required criteria to continue answering the survey. If respondents fulfill the simple or advanced branching criteria for an early exit from the survey, they are taken to the end page and their responses are not counted as completed.

  Example

  Thank you for completing this survey.

> The **Branched Out** end page is shown in the **End Pages** section only if one or more branches or destinations are set in the survey.

- **Invalid Access** – This page appears when a respondent enters an invalid key to access the survey.

  Example

  Invalid access key. Please use the **Back** button in your browser and try again.

> The **Invalid Access** end page is shown in the **End Pages** section only if the survey distribution method is **Require a Passcode**.

- **Prevent Updates** – This page appears when a respondent has already completed the survey and tries to access it again.

  Example

  You have already submitted a response to this survey.

> The **Prevent Updates** end page is shown in the **End Pages** section only if the **Allow respondent to update a completed survey** option is not selected on the **Properties** tab.

- **Survey Closed** – This page appears when a respondent tries to access the survey when it is closed.

  Example

  This survey is now closed. Thank you for your interest.

- **Quota Reached** – This page appears when a respondent tries to answer the survey but enough responses have already been collected and the defined quota has been reached.

  Example

  The quota for this survey based on your demographics has already been met. Thank you for your interest.

> The **Quota Reached** end page is shown in the **End Pages** section only if one or more quotas are set for the survey on the **Quotas** tab.

- **Opt Out** – This page appears when a respondent unsubscribes from future survey invitations. Respondent can still take the survey if they have the survey link.

> This functionlity is available for the **Require a Passcode** and **Create a List** surveys.

  Example

  You will not receive further survey invitations from this list. You can still take surveys.

  Thank you for your time!

- **JavaScript Required** – This page appears when JavaScript is not active in the respondent's browser. Respondent has to activate Javascript in the browser settings to be able to take the survey.

  Example

  This survey will not be accessible if the browser has JavaScript disabled. Please enable JavaScript in your browser settings to continue with the survey (Press F1 for Browser Help).

> The **JavaScript Required** end page is shown in the **End Pages** section only if the **JavaScript Required** option is selected on the **Properties** tab.

- **Custom end page** – You can use this page to create a unique message and apply it as the survey end page.

End Page Behavior Options

In the end page designer, you can define the behavior of the survey end page using the following options from the **Behavior** drop-down list.

- **Standard Confirmation Page** – Use this option to define a standard **Thank You** message. Default messages are available for each end page type but you can also edit the page content.
- **Redirect to an existing Web page** – Use this option to redirect respondents to a specific Web page outside the EFM application. Start the address with http://, for example, http://www.vovici.com
- **Display Live Results** – Use this option to provide respondents with a summary of the current survey results. In addition, you can allow respondents to view their own answers highlighted in red as well as to print or email their answers by selecting the corresponding check boxes in the end page designer.
- **Display Respondent Answers –** Use this option to provide respondents with their own responses. You can allow respondents to print or email their answers by selecting the **Allow the respondent to print and e-mail this page** check box.

In **Modern** survey rendering mode, the **Display Live Results** and the **Display Respondent Answers** survey end pages are displayed correctly for all screen sizes automatically.

For **Display Live Results** and **Display Respondent Answers** only pages, questions, and choices that were visible to the respondent are displayed.

Edit an End Page

Procedure

1. On the **Pages** side tab, expand the **End Pages** section.
2. Click the end page you want to edit.

You can also open the **Design End Page** dialog box by clicking the **Go to Page** link, which appears when hovering over the page you want to edit, or by selecting the **Edit Page** option from the page drop-down menu.

3. In the **Design End Page** dialog box, edit the end page title in the **Displayed Title** field if needed.
4. Select the end page behavior option from the **Behavior** drop-down list. For detailed information, see the section End Page Behavior Options, page 398 earlier in this topic.
5. Edit the contents of the end page, if needed.
6. To check spelling, click the **Spell Check** icon.
7. Click **Save**.

You can customize text and add media to the end page using the editing toolbar.

Add a Custom End Page

Procedure

1. On the **Pages** side tab, expand the **End Pages** section.
2. Click the **Add Custom Page** link.
3. In the **Design Custom End Page** dialog box, type the custom end page name in the **Displayed Title** field.
4. From the **Behavior** drop-down list, select the custom end page behavior option. For detailed information, see the section End Page Behavior Options, page 398 earlier in this topic.
5. From the **Count respondents who reach this page as** drop-down list, select the appropriate option.
6. Type the content of your custom end page.
7. To check spelling, click the **Spell Check** icon.
8. Click **Save**.

> You can customize text and add media to your end page using the editing toolbar.

Test a Custom End Page

Procedure

1. On the **Pages** tab, expand the **End Pages** section.
2. Select the end page you want to test and click the end page drop-down menu.
3. In the end page drop-down menu, click **Test**.

   The testing your survey window opens, where you can view the end page with a survey theme applied. You can copy and paste the testing URL as you need.

> For the **Display Live Results** and **Display Respondent Answers** end page options, if there are no responses collected, random data are displayed.

Delete a Custom End Page

Procedure

1. On the **Pages** tab, expand the **End Pages** section.
2. Select the end page you want to delete and click the end page drop-down menu.
3. In the end page drop-down menu, click **Delete**.

> You cannot delete system end pages.

Branched Out and Over Quota on the End Pages

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > **End Pages** section.

You can use two additional statuses on the end pages **Branched Out** and **Over Quota**. With the new statuses, you can track and single out respondents who are branched out of your survey or are over the quota limit.

> To avoid entering the insecure code into the End Page designer, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

Branched Out

You can select whether respondents who reach the **Branched Out** end page are treated as **Completed** or as **Branched Out**. By default, the responses are considered as **Branched Out**. You can change this setting while designing the **Branched Out** end page. Use the **Count respondents who reach this page as** list to set the status.

Respondents who have the **Branched Out** status do not receive any reminder emails to take the survey.

> For all surveys created before the 6.3 release, the **Branched Out** end page is set to the **Completed** status by default.

Over Quota

You can select whether respondents who reach the **Quota Reached** end page are treated as **Started** or as **Over Quota**. By default, the responses are considered as **Over Quota**. You can change this setting while designing the **Quota Reached** end page. Use the **Count respondents who reach this page as** list to set the status.

Respondents who have the **Over Quota** status do not receive any reminder emails to take the survey.

> For all surveys created before the 6.3 release, the **Over Quota**end page is set to the **Started** status by default.

Set the Branched Out Status

Procedure

1. In the **Design** view, click the **Pages** tab in the left pane.
2. Click the **End Pages** section to expand it.
3. Click the **Branched Out** end page to open it in the end page designer.
4. In the **Count respondents who reach this page as** list, select the **Branched Out** status.

5 Click **Save**.

Set the Over Quota Status

Procedure

1 In the **Design** view, click the **Pages** tab in the left pane.

2 Click the **End Pages** section to expand it.

3 Click the **Quota Reached** end page to open it in the end page designer.

> The **Quota Reached** end page and the **Over Quota** status appear only if the **Quota Management** functionality is available for your workgroup.

4 From the **Count respondents who reach this page as** list, select the **Over Quota** status.

5 Click **Save**.

Branched Out and Over Quota on the Custom End Pages

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab > **Custom End Pages** section.

You can assign additional statuses to the survey respondents on the custom end pages. With the new statuses, you can track and single out respondents who are branched out of your survey or are over the quota limit.

> To avoid entering the insecure code into the Custom End Page designer, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

You can set the following statuses for respondents who reach the custom end page of your survey:

- **Started** – Respondents who start taking the survey.
- **Completed** – Respondents who complete the survey.
- **Branched Out** – Respondents who do not meet the certain criteria and are branched out of your survey.
- **Over Quota** – Respondents who are over the quota limit defined for your survey.

You can track these statuses and create more accurate reports using them. By default, the status on the custom end page is set to **Completed**.

Respondents who have the **Over Quota** or **Branched Out** status do not receive any reminder emails to take the survey.

For all surveys created before the 6.3 release that have the **Do not count respondents who reach this page as "Completed"** check box selected on the custom end page, the default status is set to **Started**.

Procedure

1. In the **Design** view, click the **Pages** tab in the left pane.
2. Click the **Custom End Pages** section to expand it.
3. Click the **Add a Custom Page** button to create a new custom page.

> You can also add a new custom end page by using the **Add Custom End Page** option in the page drop-down menu on the survey designer toolbar.

4. Click the page icon to open the page in the end page designer.
5. From the **Count respondents who reach this page as** drop-down list, select the status you want to set for respondents.
6. Click **Save**.

Blocks and Page Randomization

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

You can choose in which order the pages and child blocks are displayed in the blocks.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Verint Resources, page 50.

The following types of page order are available:

- **Fixed order** – Displays pages and child blocks within a block in an ascending order and is the same for all respondents. By default, all pages and child blocks are displayed in a fixed order.
- **Random order** – Displays pages or child blocks within a block in a randomized order to your respondents.
- **Rotated order** – Displays pages or child blocks within a block in a rotated order to your respondents. For example, if a block contains pages 6, 7, 8, and 9, and the first respondent sees the pages in the initial order of 6, 7, 8, 9, then the second respondent sees 7,8,9,6, and the third respondent sees 8,9,6,7.

Add page or child block rotation

1 On the **Pages** page, click the block drop-down menu to the rightmost of the block that you want to edit.

2 To rotate pages in your block, in the block drop-down menu, click the **Add Page Rotation** option.

3 To rotate child blocks in your block, in the parent block drop-down menu, click the **Add Block Rotation** option.

> You can also access the same functionality from the block drop-down menu in the header of the survey content area in the survey designer.

Add page or child block randomization

1 On the **Pages** page, click the block drop-down menu to the rightmost of the block that you want to edit.

2 To randomize pages in your block, in the block drop-down menu, click the **Add Page Randomization** option.

3 To randomize child blocks in your block, in the parent block drop-down menu, click the **Add Block Randomization** option.

> You can also access the same functionality from the block drop-down menu in the header of the survey content area in the survey designer.

4 In the **Page Randomization** dialog box, click one of the following options:

- **Show All Pages** – click to show every page in the block in a random order.
- **Maximum Pages to Show Randomly** – click to show only the defined number of pages in the block in a random order. For example, if you select “3”, the survey engine selects any three pages from the block to show randomly.

5 In the **Block Randomization** dialog box, click one of the following options:

- **Show All Blocks** – click to show every child block in the block in a random order.
- **Maximum Blocks to Show Randomly** – click to show only the defined number of child blocks in the block in a random order. For example, if you select “3”, the survey engine selects any three child blocks from the block to show randomly.

6 Click **OK**.

> If a block contains a single page, the **Add Page Rotation** and **Add Page Randomization** options are disabled. Similarly, if a block contains a single child block, the **Add Block Rotation** and **Add Block Randomization** options are disabled.

In **Classic** survey rendering mode, for the block containing the first or last page of the survey, page randomization and rotation are unavailable and the page order is set to fixed. In **Modern** survey rendering mode, if the block contains the first page of the survey and the distribution method is **Require a Passcode**, page randomization and rotation are unavailable, and the page order is set to fixed. When changing from **Classic** to **Modern** rendering, the page order in the blocks with the mentioned conditions is automatically set to fixed.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Rotate and Randomize Survey Questions

When you add questions to a survey page, you can randomize the order that the questions appear to your respondents. Randomization helps to prevent question order bias, where a respondent can react differently to questions based on the order in which the questions appear.

You can also choose to rotate questions so that they appear in a different order for each respondent.

Only one option can be used at a time. For example, if you select Question Randomization for a page but then select Question Rotation, Question Randomization is turned off and Question Rotation is used.

The Page Rotation permission must be enabled to use this feature.

Add question rotation

Procedure

1. In the **Design and Collect** > **Surveys** > **My Surveys** > **Design** > **Pages** tab, click the page drop-down menu to the right of the page that you want to edit.
2. To rotate questions in your page, in the page drop-down menu, click **Add Question Rotation**. The rotation icon is displayed on the page level banner in the same manner as the page and block rotation icons.

The **Add Question Rotation** option is available when your page contains more than one question.

3. To change back to the default question order, in the page drop-down menu, click **Remove Question Rotation**.

Add question randomization

Procedure

1. In the **Design and Collect** > **Surveys** > **My Surveys** > **Design** > **Pages** tab, click the page drop-down menu to the right of the page that you want to edit.
2. To randomize questions in your page, in the page drop-down menu, click **Add Question Randomization**. The crossed arrows icon is displayed on the page level banner in the same manner as the page and block randomization icons.

The **Add Question Randomization** option is available when your page contains more than one question.

3. In the Question Randomization dialog, choose the **Maximum Questions to Show Randomly** option and select the number of questions you want to randomize from the drop-down menu.
4. Click **OK**.
5. To change back to the default question display in the page drop-down menu, click **Remove Question Randomization**.

Blocks within blocks

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab.

You can include a block into another block by clicking the **Add Block** link at the bottom of the block bar or by dragging a block into another block on the **Pages** page.

This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Contact us, page 50.

You can include a child block only into a block that is empty or contains other child blocks (you cannot mix blocks and pages in a block.)

Only two levels of block hierarchy are allowed, that is you cannot include a block into a child block.

Parent and child block drop-down menus

When using the parent and child block drop-down menus, the blocks' levels of hierarchy are taken into account. This way the parent block menu differs from the child block menu by the following:

- The **Add Block** option in the parent block menu adds a block after the current parent block. The **Add Block** option in the child block menu adds another child block after the current one.
- The **Add Block Rotation** and **Add Block Randomization** options are available in the parent block menu. The **Add Page Rotation** and **Add Page Randomization** options are available in the child block menu.

Blocks within blocks representation in survey designer

In the survey designer, you cannot view a parent block, only its child blocks. You can open the parent block in the **Pages** page by clicking the link with the parent block's name placed above the child blocks' name in the survey content area header.

Export Visible Questions

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Pages** tab. **Survey Completed** end page.

You can allow respondents to view, print, or email the survey they took. After completing a survey, respondent is presented with a survey version where only the questions asked to this particular respondent are visible. The questions that are hidden or not asked of the respondent (due to different conditions, piping, and so on) are not shown in the report.

To display the exact respondent answers, you need to configure the survey end page. On the **Pages** tab, open the **Survey Completed** end page. This page appears when a respondent completes and submits the survey.

In the **Survey Completed** dialog box, define the following options:

- Select the **Display Respondent Answers** option in the **Behavior** list to allow the respondents to view only their own responses after completing a survey.
- Select the **Allow the respondent to print and email this page** check box to allow the respondents to print and email only their own responses. With this check box selected, respondents will see the **Email this Report** and **Send to Printer** links after completing a survey.

Email a Taken Survey

Procedure

1. After you completed a survey, your survey responses display.
2. Click the **Email this Report** link. The following dialog box opens.
3. Enter the email address of this report recipient.
4. Click **OK**. The report is sent.

It takes some time for the report to be delivered.

Print a Taken Survey

Procedure

1. After you have completed a survey, your survey responses display.
2. Click the **Send to Printer** link.
3. Set up your print options, and then click **Print**. The report is printed.

Survey Formatting Tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Formatting** tab.

The **Formatting** tab of your survey designer provides a number of options to control how your survey appears when published. You can select the survey theme, define the survey buttons, tag line, and progress bar, and set the survey title visibility and the Web accessibility options. The **Formatting** tab is available on the left-hand side of the **Design** view.

The survey formatting properties are divided into the following sections:

You can view any formatting changes you make to your survey in the right preview pane immediately.

Formatting

In the **Formatting** section, you can select the survey theme, edit the survey title, and decide on the survey title visibility.

Survey Theme

Select a theme from the **Survey Theme** drop-down list. Themes help you to change the look and feel of your survey. You can use a wide variety of predefined themes or create your own custom theme. For more information on survey themes, see Survey themes, page 1288.

Survey Title

Enable the **Show** option to display the survey name to respondents. You can edit the current survey name in the provided text box. The font and text size of the survey title is controlled by specifications of the selected theme. To change the appearance of the survey title however, you may insert HTML tags directly in the text box. You can change a font color, size, alignment, and so on. For example, to center the survey title, type the following text:

<center>Survey Title</center>

Survey Language

Change your survey language to any other language by using the **Survey Language** drop-down list on the **Formatting** tab. So, if you want to create a survey in a different language, you can change the default language on a per survey basis and do not need to change your account settings.

Survey Rendering

Select how you want the survey to be rendered from the **Survey Rendering** drop-down list. Switching between survey rendering modes might impact the availability of certain features. Code Blocks and Web Services may no longer be compatible. For more information, see Survey rendering overview, page 414.

The following options are available:

- **Classic** – Select this mode to support your previous ongoing or customized surveys.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **Modern** – Select this mode to support multi-device rendering so you can create a survey once for any device. With the **Modern** rendering, surveys work across all screen sizes automatically.

> Switching a survey from **Classic** to **Modern** survey rendering mode may impact your custom survey themes.

Buttons

In the **Buttons** section, you can select the buttons you want to display in your survey and edit default text of your survey buttons.

- **Reset** – Delete all answers respondents provide on the current page and reload the page.
- **Back** – Take respondents to the previous survey page. The entered answers are saved.

> The **Preselected Values** are saved if respondents have changed their answers.

- **Save** – Allow respondents to save the survey results and continue the survey later. For the **Generate Link** surveys, when the respondents click **Save**, a page appears with a new link for them to access the saved survey.
- **Jump** – Allow respondents to jump to a specific page in the survey. You can select whether to display page name, number, or both by selecting the corresponding option. Upon clicking this button, respondents are presented with a list of all pages of the survey, from which they can navigate forwards and backwards inside the survey. This will allow respondents to access any page in the survey regardless of branching. It will allow them to enter data that might be invalid if branching rules were followed. The **Validate Record** functionality in **Manage Responses** needs to be used to validate responses in this case.

> If you add a page block to your survey, the **Jump** button is disabled.

- **Next** – Take respondents to the next survey page. The entered answers are saved.
- **Submit** – Take respondents to the **Survey Completed** end page.

> The **Submit** and **Next** buttons appear automatically in the survey.

To edit default text of your survey buttons, click the **Edit Button Labels** link. The **Messages and Labels** tab opens where you can change button names in the provided text boxes.

General

In the **General** section, you can select the tag line you want to appear in your survey. The survey tag line is text that appears at the bottom of every page of your survey.

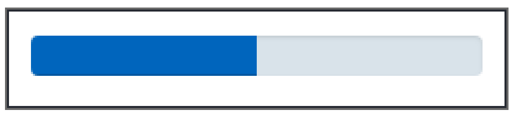
You can select the default survey tag line or add your own text and custom link. To create a link, use HTML tags. For example, to create the Click here link, type the following text:

Click here

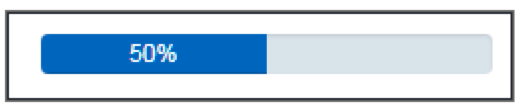
Progress Bar

In the **Progress Bar** section, you can select how you want the progress bar to appear in your survey. The progress bar appears at the bottom of every page of your multipage survey and shows the respondents their progress through the survey.

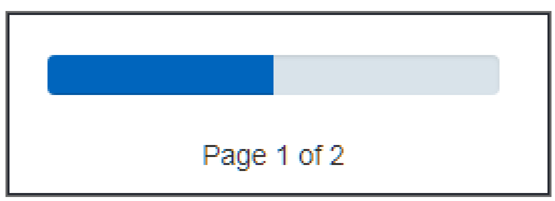
- **Show Progress Indicator** – Select to show respondents the amount of survey completed as a progress indicator.



- **Show Progress Percent** – Select to show respondents the amount of survey completed as progress percent. Use this option together with the **Show Progress Indicator** functionality.



- **Show Page Number** – Select to show respondents the amount of survey completed as page numbers.



Define text for the page numbers in your survey in the text box under **Show Page Number**. The default value is *Page %1 of %2*, where %1 is a placeholder for the current page the respondent is on and %2 is a placeholder for the total number of pages in the survey.

Appearance

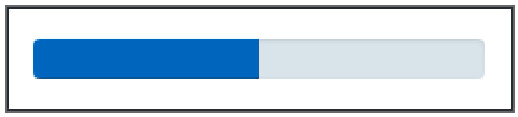
Select how you want the progress bar to appear in the survey from the **Appearance** drop-down list.

In **Classic** survey rendering, the available options are discrete and continuous.

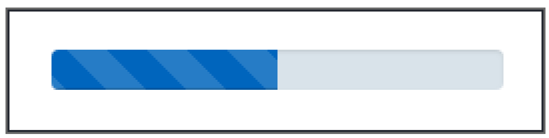
- **Discrete** – Progress bar is broken down into smaller pieces.
- **Continuous** – Progress bar is a one long rectangle.

In **Modern** survey rendering mode, the available options are default, striped bar, and striped bar with animation.

- **Default** – Progress bar is a one long rectangle.



- **Stripped Bar** – Progress bar with lines of color.



- **Stripped Bar with Animation** – Progress bar with lines of color and animation.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Web Accessibility

The **Web Accessibility** section is available only in classic survey rendering mode. In the **Web Accessibility** section, you can apply the Web accessibility options to your survey by selecting the **Use fieldset tags** check box. It groups the question elements together, resulting in a border around the question. When you generate the survey HTML, label tags and title attributes are created by default. These options allow the generation of 508 Compliant HTML that conforms to Web form guidelines for users with disabilities.

Survey language

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Formatting** tab > **Survey Formatting** pane > **Survey Language** list.

You can change your survey language to any other language by using the "Survey Language" drop-down list on the **Formatting** tab. So, if you want to create a survey in a different language, you can change the default language on a per survey basis and do not need to change your account settings.

In the "Survey Language" list, the survey languages are divided into two groups:

- **Language Pack Support** – This group includes the survey languages that are supported by the system language packs. A language pack contains the default validation messages, labels, and end pages of the survey in a certain language and is applied to your survey automatically.
- **Additional Translation Required** – This group includes all languages, except the languages supported by the system language packs. You need to translate the validation messages, labels, and end pages of your survey into the selected language.

When you change the survey language, the validation messages, labels, and end pages in your survey are updated accordingly. You can select to keep any changes you have made to the validation messages, labels, and end pages or discard the changes.

Survey Formatting pane opens where you can access the **Survey Language** list.

Procedure

1. Create a survey or open a saved survey on the **Surveys** tab. The **Design** tab opens.
2. Click the **Formatting** tab on the left panel. The **Survey Formatting** pane opens.
3. From the "Survey Language" drop-down list, select the language you want to apply to your survey.
4. To keep any changes you have made to the validation messages, labels, and end pages, click **Keep my changes**. To use the default validation messages, labels, and end pages in your survey, click **Discard my changes**.

Survey rendering overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Formatting** tab > **Survey Formatting** pane > **Survey Rendering** list.

Modern survey rendering

A **Modern** survey rendering supports multi-device rendering so you can create a survey once for any device. This ensures that respondents have an optimum survey taking experience, independent of the device that they use. With the **Modern** survey rendering, surveys work across all screen sizes automatically and have a modern look and feel.

The following features are specific for the **Modern** survey rendering only:

- Least filled choices
- Least filled criteria
- Blocks within blocks
- Block conditional visibility
- Image Upload question
- Conditional preselection
- Count placeholders
- Export value placeholders
- Matrix (Choose One and Choose Many) topic count criteria
- Multiple-campaign surveys (the exception is Offline Device campaign that can be added to Generate Link surveys in Classic rendering)

> You cannot change the survey rendering mode from Modern to Classic if the survey contains Empty Blocks, Blocks within Blocks, or Image Upload question. If you change your rendering mode to Classic, Code Blocks and Web Services might become unusable and customized Survey Themes might need updating and testing.

The following are advantages of using the **Modern** survey rendering:

- Possibility to clear the previously selected radio buttons
- Image placeholder for the **Choose One with Image** and **Choose Many with Image** questions if the image is not yet provided
- Hint text for the **Email Address**, **Whole Number**, **Real Number**, **Social Security Number**, **ZIP Code**, and **ZIP+4 Code** input types in the **Fill in the Blank** question so that the respondent knows how to answer the question
- **Instructions** option for question text
- Small and large images support in the **Choose One with Image** and **Choose Many with Image** questions
- **Please Specify** option support in **Drop-down Box** and **List Box** for a **Choose One** question
- Enhanced and more intuitive question appearance

- Improved validation error highlighting
- Improved accessibility
- Improved respondent experience

The following functionality is not available in the **Modern** survey rendering:

- Text Box Width (in characters) for **Fill in the Blank**, **Short Answer**, **Essay**, and **Matrix** with a **Short Answer** side
- Slider Width (in pixels) for a **Scale Slider** question
- Advanced table properties, **Summary** for the **Rank Order** and **Matrix** questions
- Formatting > Web Accessibility
- Properties > Generate Mobile HTML
- Advanced > Edit HTML

Code Blocks and Web Services may no longer be compatible.

Survey Themes

Switching a survey from **Classic** to **Modern** survey rendering mode may impact your custom survey themes. If you have customized survey themes and want to start using them with the new **Modern** survey rendering, your customized survey themes will need to be tested with and most likely updated for the new **Modern** rendering due to the enhanced rendering capabilities.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Code Block Best Practices

When working with code blocks in **Modern** survey rendering mode, be sure to follow these best practices:

- HTML content of survey questions may change from version to version without a publish from the author.
- IDs will probably be safe between versions.
- Using methods like .parent() to walk the DOM structure is strongly advised against.
- Do not rely on any undocumented client-side methods or libraries used by the survey as they may change from version to version without a publish from the author.

For both **Modern** and **Classic** renderings, to avoid entering the insecure code when taking a survey, on the **General Setup** page, select the **Automatically remove untrusted code from survey designer** check box.

Classic survey rendering support

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. If you belong to a workgroup created in EFM 15.1 FP3 or later versions, you use only **Modern** survey rendering.

Profiles are still rendered in **Classic** survey rendering only.

If you are an existing user that upgrades to the EFM 15.1 FP3, the **Classic** survey rendering works as usual.

In the future EFM releases, **Classic** survey rendering will not be supported.

Jump button

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Formatting** tab > **Survey Formatting** pane.

Upon clicking the **Jump** button, you are presented with a list of all pages of the survey, from which you can navigate forwards and backwards inside the survey (in a **Panel** survey, no questions should appear on page one of the survey). The page value contains the hyperlink, which when clicked, will "jump" the respondent to the selected page. You can also select whether to display page name, number, or both by selecting the corresponding option.

> If you add a page block to your survey, the **Jump** button is disabled.
> You can display **Page Name** and **Number** in **Modern** survey rendering only.

If participants change their mind, they can click **Close** and continue the survey as usual.

If you add branching criteria to your survey, respondents can skip to other pages in the survey. They can skip to a location in the survey where their previous answers should not have been allowed, due to skip patterns either by Advanced Branching logic (see Branching Tab, page 441) or by setting a **Destination** statement under the Properties Panel (see Properties Panel, page 1) defined in the survey. You can use **Validate Record** or **Validate All Records** under **Analyze > View Responses > Actions** drop-down menu that will validate the data based on the skip patterns that are defined in the survey. If a participant should not have seen the question, their responses to these skipped questions will be replaced with the **Not Asked** value for reporting purposes.

If you plan on using the **Validate Records** function in the product, the following additional restrictions on branching must be adhered to, otherwise unintended data deletion may occur.

- The advanced branch checkpoint question must be the last question on a page.
- A question that has basic branching in it must be the last question on a page.
- The target question of a branch must be the first question on a page.

Messages and Labels tab

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Labels** tab.

On the **Labels** tab, you can view and edit the button, question, and survey results' labels and validation messages. As long as you can edit the message text, the variable information (%Q, %1, or %2) in the message should remain. The %Q bookmark displays the question heading or topic label, while the %1 and %2 bookmarks display the lower and upper character count for topics of text type or number range for topics of number type. Keep in mind that the whole survey is updated when you make changes on the **Labels** tab.

You can access the **Labels** tab from the left pane of the **Design** view.

You can filter all of your survey labels and messages by the following categories:

- **Show Everything** – View and edit all the potential messages and labels in all the categories.
- **Button Labels** – View and edit all the button labels in your survey, for example, **Next** or **Submit**.
- **Question Labels** – View and edit all the validation messages depending on the question type, for example, "Hide Answers" or "Drag here."
- **Validation Messages** – View and edit all the general validation messages in your survey, for example, "Choose date from calendar."
- **Respondent Survey Results' Labels** – View and edit all the labels that are displayed to the respondents when they are provided with the survey results, for example, "Your responses are highlighted in the results below."

You cannot use the HTML for writing labels and messages.

Translation module overview

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Translation** tab.

In the translation module you can do the following:

- Translate the survey, page 426.
- Translations import and export , page 429 to different file formats.
- Add mappings to the survey, page 428. For more information, see Translation Mappings, page 427.
- View the translation progress for each language.
- Mark the outdated translations.
- Switch the translation view between All Pages and Separate Pages.

After creating the original survey in a survey designer, you can translate it into multiple languages to deploy it to a global audience. You can translate the questionnaire, validation messages, labels, end pages, page names. Additionally, each time you edit a translation, your work is saved automatically to reduce the risk of data loss.

The **Translation** tab is available on the left panel in the survey designer.

To go back to the survey designer, click the Return link in the upper-left corner of the page.

Language Packs

Navigation

Design and Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > to view the messages and labels of your survey, click the **Labels** tab > to view the messages and labels of your translation, click **Translation** tab.

Language packs are used to update the default validation messages, labels, and end pages of your survey to the currently selected survey language.

Language pack is an XML file, which contains the default validation messages, labels (including progress bar and scoring labels), and end pages of the survey in a certain language. When you create a new survey or change the language of your survey, the language pack is automatically applied to your survey in the closest matching language. In addition, when you translate your survey, the corresponding language packs are applied to the source language and target language of your translation automatically.

Thus, you do not need to translate the validation messages, labels, and end pages of your survey if the language pack is available for the selected language. For example, if you create your survey in French, the validation messages, labels, and end pages of the survey appear in French automatically.

If you translate your survey from French into English, for example, the French and English language packs are applied to your base language and your translation accordingly.

Language packs are stored on the **Library** tab on the **Language Packs** side tab. There are default (system) language packs and language packs imported by the users. Default language packs are locked and cannot be deleted or replaced. Language packs imported by the users are not locked. Default language packs are shared across the application while the user's language packs are shared within the workgroup only

For details on importing and exporting the language packs, see Import and export language packs, page 422.

Default language packs support the languages available for the EFM application interface. Currently, the EFM application supports 11 default language packs:

- Chinese (Simplified)
- English
- French
- German
- Italian
- Japanese
- Portuguese (Brazil)
- Portuguese (Portugal)
- Russian
- Spanish
- Thai

In the application, the following preference is used for applying a language pack:

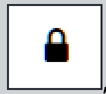
1. Check all workgroup language packs to match the base culture exactly.
2. If there is no language pack, check all default language packs to match the base culture exactly.
3. If there is no language pack, check all workgroup language packs for the closer matching.

4 If there is no language pack, check all default language packs for the closer matching.

5 If there is no language pack, apply the same language pack as for the application interface.

You can manage the language packs by using the corresponding options on the toolbar:

- Import and export language packs, page 422
- Delete a language pack, page 423

> Since the system language packs are locked , you cannot delete them.

Import and export language packs

Navigation

Library tab > **Language Packs** tab.

You can export, import, and delete the language packs on the **Language Packs** side tab of the **Library** tab. A language pack contains default validation messages, labels, and end pages of the survey in a certain language and is applied to your survey automatically.

For more information about the language packs, see Language Packs, page 420.

Procedure

1 Import a language pack:

a. On the **Language Packs** side tab, click the **Import** button on the toolbar.

b. In the **Upload Language Pack** dialog box, select the language, for which you want to upload a new language pack.

c. Select the **Show regional variations for each language** check box to view the variations for all languages in the drop-down list. For example, for the Italian language, the Italian (Italy) and Italian (Switzerland) variations appear.

d. Click **Browse** and locate a file that you want to upload, and then click **Open**.

You can import an XML file only.

e. Click **Add**.

The **Upload Language Pack** dialog box remains open so that you can add more language packs.

f. Click **Close**.

2 Export a language pack:

a. On the **Language Packs** side tab, select the check box next to the language pack that you want to export.

You can export one file at a time only.

b. Click the **Export** button on the toolbar.

c. In the **Export Language Pack** dialog box, click **Export**. The exported file is generated in the XML file format.

d. Click the link to download the exported file.

Delete a language pack

Navigation

Library tab > **Language Packs** tab.

Procedure

1 On the **Language Packs** tab, select the check box next to the language pack that you want to delete.

> You cannot delete the system language packs.

2 Click the **Delete** button on the toolbar.

3 In the confirmation dialog box, click **Delete**.

For more information about language packs, see Language Packs, page 420 and Import and export language packs, page 422.

Translation page

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Languages** section.

After you click any of the added languages, the corresponding translation page opens, where you can translate the survey questions, end pages, validation messages, and labels. This page contains the following tabs:

- **Questions** – Text of the survey including questions, instructions, response options, section headings, and prefilled text for the **Fill in the Blank** questions.

> To avoid entering the insecure code into your survey, on the **GeneralSetup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

- **End Pages** – Text of the end pages in your survey, such as **Survey Saved**, **Survey Closed**, **Quota Reached**, **Prevent Updates**, and **Survey Submitted**.
- **Validation Messages** – Text of the messages that appears to a respondent if the answer does not meet the specific limitations and conditions applied to the question.
- **Labels** – Text of the buttons (for example, **Next**, **Save**, or **Submit**) in your survey, title of the survey, text on the progress bar, and passing and failing messages for surveys with scoring.

> The validation messages, labels, and end pages of your survey are translated for you if the language pack is available in the application for the selected language. For more information about language packs, see Language Packs, page 420.

You can use the pagination bar to navigate through your survey translation and switch the translation view between **View All Pages** and **View Separate Pages**.

> To preview the translated survey, click **Preview** on the survey designer toolbar, and then click the necessary language in the **Language** list.

Also, in the right pane of the translation page, you can do the following:

- View the survey source (base) language in the left pane and the target (translation) language in the right pane. To switch between the translations, click the translation that you want from the **Language** list.
- Translations import and export , page 429.
- View statistics associated with your survey translation by clicking the **Statistics** link. The summary shows the progress of your survey translation based on the words and phrases. Details for each language are listed separately.

Language Selection page

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Languages** section.

In the **Options** section, you can manage the **Language Selection** page. Click **Edit** to open the **Language Selection Page Designer**, where you can create a page for the multilingual surveys where participants can select a language to take a survey.

You can also use the following options:

- **Let the user manually select the survey language** – Select to show the language selection page to your respondents each time they take a multilingual survey, regardless of the web browser's default language.
- **Include country flags** – Select to show the country flags according to the chosen languages on the language selection page (in **Modern** survey rendering only).

You can also change the default country flag by clicking it, and then uploading the needed image from your computer.

> The uploaded image is shrunk to the size of the default flags only in the **Language Selection Page Designer**. For the respondents (on the language selection page), it is shown in its actual size.

In **Modern** survey rendering, the %Languages% placeholder includes all languages selected in the right pane.

In the right pane, you can select the check boxes next to the languages that you want to display on the language selection page. By default, all languages specified in the **Languages** section are selected. You can change their order by dragging them, and you can edit the language text as needed.

> To avoid entering the insecure code into **Language Selection Page Designer**, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

In **Classic** survey rendering, the **Language Links** right pane includes the links to each translated version of your survey. To add a language to the page, double-click that language or select the needed language, and then click the **Insert Link** button.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Translate the survey

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Languages** section.

While translating your survey, you can use the editing toolbar to format your translation text. In addition, you can mark an item as translated if it sounds the same in the target language, for example.

The translated text appears in black while the untranslated text appears in red. If you make any changes in the base language, the corresponding text in your translation is marked in gray and has the **Out of Date** icon next to it. This functionality helps you to identify the changes and make any edits to your translation, if required. You can view the list of the outdated elements for the currently selected translation in the **Translations Out Of Date** menu.

The **Out Of Date** functionality does not apply to the images.

Procedure

1 Add translation languages:

a. On the **Translation** tab, in the **Languages** section, click the **Add Language** button.

b. In the **Select the language to add** dialog box, select the needed language, and the click **OK**.

You can also add the translation language by using the **Language** option in the **Actions** menu on the survey designer toolbar.

To delete the survey translation with all its content, click **Delete** next to the translation language you want to delete.

2 Translate your survey:

a. In the **Translation** pane, from the **Languages** list, click the needed language.

b. On the **Translation** page, click the text that you want to translate. The text becomes editable.

You can view the progress for each translation in the **Languages** section.

3 Translate the text, and then move to the next item. The translated text becomes black.

Translation Mappings

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Mappings** section.

You can assign multiple languages to your survey translation so that you do not need to translate your survey for the similar languages. When the survey is first accessed, it appears to participants in their Web browser's preferred language. You can use mappings to manually assign languages to specific survey translations. For example, you can set up mappings to direct the French survey participants from France and Canada to your survey in French.

You can map languages to translations on the **Translation** tab in the survey designer. For details, see Add mappings to the survey, page 428.

> If you make any changes to your survey in v5 of the EFM application, the language mappings are lost.

After determining the web browser's default language, the application uses the following preference to direct a survey participant to a survey in a certain language:

1. Check all translation languages to match the web browser's default language exactly.
2. If there is no translation, check all mapped languages to match the web browser's default language exactly.
3. If there is no translation, check all translation languages not taking into account the regional code (Spanish-MX -> Spanish).
4. If there is no translation, check all mapped languages not taking into account the regional code.
5. If there is no translation, present the survey in the base language.

> If you configure the language selection page for your participants, it has the highest priority for determining a survey language.

Add mappings to the survey

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Mappings** section.

You can map languages to translations on the **Translations** tab in the survey designer. For more information about mappings, see Translation Mappings, page 427.

Procedure

1 On the **Translation** tab, click the **Mappings** section to expand it.

2 Click **Add Mapping**.

3 In the **Map Languages to Translations** dialog box, select a survey translation to which you want to assign the languages.

4 Select the check box next to the languages that you want to associate with the specified translation.

5 Click **Apply**.

Translations import and export

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Import** or **Export** link.

You can export your translations into the .xlsx, .csv, .xlf, or .zip file formats, and then import them back to the EFM application. With the new file formats, you can quickly and easily combine translations from external translators and upload them to the EFM application. You can export and import multiple translations. After importing the translation, you can still make the changes. For faster uploading, compress your files to a .zip archive. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats. You can export and import the questionnaire, validation messages, labels, end pages, and page names. In Excel files, these sections are placed on the separate worksheets.

To avoid importing or exporting translations that contain the insecure code, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

It is recommended that you import the content exported from the current survey only. Importing other surveys or content in an invalid format may cause some issues in your survey.

You can give a user the permission only to view and import translations by selecting **Administration** > **Roles** > **Group Administration** > **LibraryItems** > **Translate** check box.

Procedure

1 Import the translation:

a. On the translation page, click **Import** in the upper-left corner.

b. In the **Import Translations** dialog box, click **Browse**, and then locate the needed file.

c. Click **Next**.

d. Click **Import**.

If you try to import a translation again, the list of translations to be overwritten appears in the dialog box.

2 Export the translation:

a. On the translation page, click **Export** in the upper-left corner.

b. In the **Export Translations** dialog box, select the needed file format.

c. To compress the file to a .zip archive, select the **Create zip archive** check box.

d. Click **Next**.

e. Click the file link to download the exported file, and then click **Close**.

Preview the translated survey

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one from the **My Surveys** grid > **Translation** tab > **Preview** button > **Language** menu.

To ensure that the translated text will look properly in a published survey, you can use the **Preview** option while designing your survey.

Before you begin

- Verify that your survey is translated into at least one language.

Procedure

1. On the **My Surveys** page, open the translated survey.
2. On the survey designer toolbar, click the **Preview** button, and then select the needed language from the **Language** drop-down menu.

   The translated survey appears in **Preview** mode.

Culture code table

You can identify the correct culture for the language you are currently using to import users or work with translations.

For a list of language/culture names, see the **Culture code** table below.

Language/Region	Culture name
Afrikaans - South Africa	af-ZA
Albanian - Albania	sq-AL
Alsatian - France	gsw-FR
Amharic - Ethiopia	am-ET
Arabic - Algeria	ar-DZ
Arabic - Bahrain	ar-BH
Arabic - Egypt	ar-EG
Arabic - Iraq	ar-IQ
Arabic - Jordan	ar-JO
Arabic - Kuwait	ar-KW
Arabic - Lebanon	ar-LB
Arabic - Libya	ar-LY
Arabic - Morocco	ar-MA
Arabic - Oman	ar-OM
Arabic - Qatar	ar-QA
Arabic - Saudi Arabia	ar-SA
Arabic - Syria	ar-SY
Arabic - Tunisia	ar-TN
Arabic - U.A.E.	ar-AE
Arabic - Yemen	ar-YE

Language/Region	Culture name
Armenian - Armenia	hy-AM
Assamese - India	as-IN
Azerbaijani - Azerbaijan (Cyrillic)	az-Cyrl-AZ
Azerbaijani - Azerbaijan (Latin)	az-Latn-AZ
Bangla (Bangladesh)	bn-BD
Bangla - India (Bengali Script)	bn-IN
Bashkir - Russia	ba-RU
Basque - Basque	eu-ES
Belarusian - Belarus	be-BY
Bosnian - Bosnia and Herzegovina (Cyrillic)	bs-Cyrl-BA
Bosnian - Bosnia and Herzegovina (Latin)	bs-Latn-BA
Breton - France	br-FR
Bulgarian - Bulgaria	bg-BG
Burmese - Myanmar	my-MM
Catalan - Catalan	ca-ES
Central Atlas Tamazight (Latin) - Algeria	fr-FR
Central Atlas Tamazight (Latin) - Algeria	tzm-Latn-DZ
Central Atlas Tamazight (Tifinagh) - Morocco	tzm-Tfng-MA
Central Kurdish (Iraq)	ku-Arab-IQ
Cherokee (Cherokee, United States)	chr-Cher-US
Chinese - PRC	zh-CN
Chinese - Taiwan	zh-TW
Corsican - France	co-FR
Croatian - Bosnia and Herzegovina	hr-BA

Language/Region	Culture name
Croatian - Croatia	hr-HR
Czech - Czech Republic	cs-CZ
Danish - Denmark	da-DK
Dari - Afghanistan	prs-AF
Divehi - Maldives	dv-MV
Dutch - Belgium	nl-BE
Dutch - Netherlands	nl-NL
Dzongkha	dz-BT
English - Australia	en-AU
English - Belize	en-BZ
English - Canada	en-CA
English - Caribbean	en-029
English - India	en-IN
English - Ireland	en-IE
English - Jamaica	en-JM
English - Malaysia	en-MY
English - New Zealand	en-NZ
English - Philippines	en-PH
English - Singapore	en-SG
English - South Africa	en-ZA
English - Trinidad	en-TT
English - Great Britain	en-GB
English - United States	en-US
English - Zimbabwe	en-ZW

Language/Region	Culture name
Estonian - Estonia	et-EE
Faroese - Faroe Islands	fo-FO
Filipino - Philippines	fil-PH
Finnish - Finland	fi-FI
French - Belgium	fr-BE
French - Canada	fr-CA
French - France	fr-FR
French - Luxembourg	fr-LU
French - Monaco	fr-MC
French - Switzerland	fr-CH
Frisian - Netherlands	fy-NL
Fulah (Latin, Senegal)	ff-Latn-SN
Galician - Galician	gl-ES
Georgian - Georgia	ka-GE
German - Austria	de-AT
German - Germany	de-DE
German - Liechtenstein	de-LI
German - Luxembourg	de-LU
German - Switzerland	de-CH
Greek - Greece	el-GR
Greenlandic - Greenland	kl-GL
Guarani - Paraguay	gn-PY
Gujarati - India (Gujarati Script)	gu-IN
Hausa (Latin) - Nigeria	ha-Latn-NG

Language/Region	Culture name
Hawaiian - United States	haw-US
Hebrew - Israel	he-IL
Hindi - India	hi-IN
Hungarian - Hungary	hu-HU
Icelandic - Iceland	is-IS
Igbo - Nigeria	ig-NG
Inari Sami - Finland	smn-FI
Indonesian - Indonesia	id-ID
Inuktitut (Latin) - Canada	iu-Latn-CA
Inuktitut (Syllabics) - Canada	iu-Cans-CA
Irish - Ireland	ga-IE
isiXhosa / Xhosa - South Africa	xh-ZA
isiZulu / Zulu - South Africa	zu-ZA
Italian - Italy	it-IT
Italian - Switzerland	it-CH
Japanese - Japan	ja-JP
Javanese (Latin) - Indonesia	jv-Latn-ID
Kannada - India (Kannada Script)	Kannada - India (Kannada Script)
Kazakh - Kazakhstan	kk-KZ
Khmer - Cambodia	km-KH
K'iche - Guatemala	qut-GT
Kinyarwanda - Rwanda	rw-RW
Konkani - India	kok-IN
Korean(Extended Wansung) - Korea	ko-KR

Language/Region	Culture name
Kyrgyz - Kyrgyzstan	ky-KG
Lao - Lao PDR	lo-LA
Latvian - Legacy	lv-LV
Latvian - Standard	lv-LV
Lithuanian - Lithuania	lt-LT
Lower Sorbian - Germany	dsb-DE
Lule Sami - Norway	smj-NO
Lule Sami - Sweden	smj-SE
Luxembourgish - Luxembourg	lb-LU
Macedonian - F.Y.R.O.M	mk-MK
Malay - Brunei	ms-BN
Malay - Malaysia	ms-MY
Malayalam - India (Malayalam Script)	ml-IN
Maltese - Malta	mt-MT
Maori - New Zealand	mi-NZ
Mapudungun - Chile	arn-CL
Marathi - India	mr-IN
Mohawk - Mohawk	moh-CA
Mongolian (Cyrillic) - Mongolia	mn-MN
Mongolian (Mongolian) - Mongolia	mn-Mong-MN
Mongolian (Mongolian – PRC – Legacy)	mn-Mong-CN
Mongolian (Mongolian– PRC – Standard)	mn-Mong-CN
N'ko – Guinea	nqo-GN
Nepali - Federal Democratic Republic of Nepal	ne-NP

Language/Region	Culture name
Northern Sami - Finland	se-FI
Northern Sami - Norway	se-NO
Northern Sami - Sweden	se-SE
Norwegian - Norway (Bokmål)	nb-NO
Norwegian - Norway (Nynorsk)	nn-NO
Occitan - France	oc-FR
Odia - India (Odia Script)	or-IN
Pashto - Afghanistan	ps-AF
Persian	fa-IR
Polish - Poland	pl-PL
Portuguese - Brazil	pt-BR
Portuguese - Portugal	pt-PT
Punjabi - India (Gurmukhi Script)	pa-IN
Punjabi (Islamic Republic of Pakistan)	pa-Arab-PK
Quechua - Bolivia	quz-BO
Quechua - Ecuador	quz-EC
Quechua - Peru	quz-PE
Romanian - Romania	ro-RO
Romansh - Switzerland	rm-CH
Russian - Russia	ru-RU
Sakha - Russia	sah-RU
Sanskrit - India	sa-IN
Scottish Gaelic - Great Britain	gd-GB
Serbian - Bosnia and Herzegovina (Cyrillic)	sr-Cyrl-BA

Language/Region	Culture name
Serbian - Bosnia and Herzegovina (Latin)	sr-Latn-BA
Serbian - Montenegro (Cyrillic)	sr-Cyrl-ME
Serbian - Montenegro (Latin)	sr-Latn-ME
Serbian - Serbia (Cyrillic)	sr-Cyrl-RS
Serbian - Serbia (Latin)	sr-Latn-RS
Serbian - Serbia and Montenegro (Former) (Cyrillic)	sr-Cyrl-CS
Serbian - Serbia and Montenegro (Former) (Latin)	sr-Latn-CS
Sesotho sa Leboa / Northern Sotho - South Africa	nso-ZA
Setswana / Tswana - Botswana	tn-BW
Setswana / Tswana - South Africa	tn-ZA
Shona – Zimbabwe	sn-Latn-ZW
Sindhi (Islamic Republic of Pakistan)	sd-Arab-PK
Sinhala - Sri Lanka	si-LK
Skolt Sami - Finland	sms-FI
Slovak - Slovakia	sk-SK
Slovenian - Slovenia	sl-SI
Southern Sami - Norway	sma-NO
Southern Sami - Sweden	sma-SE
Spanish - Argentina	es-AR
Spanish - Bolivarian Republic of Venezuela	es-VE
Spanish - Bolivia	es-BO
Spanish - Chile	es-CL
Spanish - Colombia	es-CO
Spanish - Costa Rica	es-CR

Language/Region	Culture name
Spanish - Dominican Republic	es-DO
Spanish - Ecuador	es-EC
Spanish - El Salvador	es-SV
Spanish - Guatemala	es-GT
Spanish - Honduras	es-HN
Spanish - Latin America	es-419
Spanish - Mexico	es-MX
Spanish - Nicaragua	es-NI
Spanish - Panama	es-PA
Spanish - Paraguay	es-PY
Spanish - Peru	es-PE
Spanish - Commonwealth of Puerto Rico	es-PR
Spanish - Spain (International Sort)	es-ES
Spanish - Spain (Traditional Sort)	es-ES_tradnl
Spanish - United States	es-US
Spanish - Uruguay	es-UY
Standard Moroccan Tamazight - Morocco	zgh-Tfng-MA
Swahili - Kenya	sw-KE
Swedish - Finland	sv-FI
Swedish - Sweden	sv-SE
Syriac - Syria	syr-SY
Tajik - Tajikistan	tg-Cyrl-TJ
Tamil - India	ta-IN
Tamil - Sri Lanka	ta-LK

Language/Region	Culture name
Tatar – Russia (Legacy)	tt-RU
Tatar – Russia (Standard)	tt-RU
Telugu - India (Telugu Script)	te-IN
Thai - Thailand	th-TH
Tibetan - PRC	bo-CN
Tigrinya (Eritrea)	ti-ET
Tigrinya (Ethiopia)	ti-ET
Turkish - Turkey	tr-TR
Turkmen - Turkmenistan	tk-TM
Ukrainian - Ukraine	uk-UA
Upper Sorbian - Germany	hsb-DE
Urdu – India	ur-IN
Urdu (Islamic Republic of Pakistan)	ur-PK
Uyghur - PRC	ug-CN
Uzbek - Uzbekistan (Cyrillic)	uz-Cyrl-UZ
Uzbek - Uzbekistan (Latin)	uz-Latn-UZ
Valencian - Valencia	ca-ES-valencia
Vietnamese - Vietnam	vi-VN
Welsh - Great Britain	cy-GB
Wolof - Senegal	wo-SN
Yi - PRC	ii-CN
Yoruba - Nigeria	yo-NG

Branching Tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab.

Branching allows you to customize the survey so that individual respondents only see specific sections of the survey based on how they answer certain questions in your survey. With advanced branching, you can create surveys that change their behavior based on the input of a respondent. Therefore, you can set one or more logic rules that are considered when a respondent answers questions in a survey.

Branching requires that questions be separated by page breaks. Specifically, in order to branch to a certain question based on responses to previous questions, the target question must be separated from the previous questions by at least one page break.

If you plan on using the Validate Records function in the product, the following additional restrictions on branching must be adhered to, otherwise unintended data deletion may occur.

- The advanced branch checkpoint question must be the last question on a page.
- A question that has basic branching in it must be the last question on a page.
- The target question of a branch must be the first question on a page.

You can easily access the advanced branching functionality from the **Branching** tab in the left pane of the survey designer.

Adding Branching Criteria

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab > **Add Branch** button.

You can add branching criteria by using the **Add Branch** dialog box. To add new criteria, click the **Add Another Criteria** link. The drop-down lists appear, where you can specify the question, expression, and value.

The branching criteria can be based on more than one question. For example, a branch may contain criteria based on Question 1 (respondent gender) and Question 2 (respondent age). So, respondents who are both female and between the ages of 21 and 29 are branched to a question or series of questions related directly to them.

Under branching criteria designer, there is a **Device Type** criterion with the **Desktop** and **Mobile** values. You can use this criterion to branch based on the detected device type. By adding this branching criterion, you can set the path through your questions similarly to how you add branching logic to your survey. The **Device Type** criteria can be combined with other branching criteria.

iPad and tablets are considered Desktop devices.

In **Modern** survey rendering mode, under branching criteria designer, there is a response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

You can add branching criteria to set the path through your questions based on the count of responses provided by the respondent. For example, if you want to branch to the appropriate question and in the branching criteria designer you specify that the response count criterion equals 2, the respondent is directed to the specified question, if the respondent's answers match the specified criterion.

The options for expression vary depending on the question type. For example, the **Multiple Choice: Choose One** questions support the following expressions:

- Equal To
- Not Equal To
- Less Than
- Greater Than
- Less Than Or Equal
- Greater Than Or Equal

The **Fill in the Blank** questions support the following expressions for text responses:

- Equal To
- Not Equal To
- Contains
- Does Not Contain

- Begins With
- Ends With

For example, if you define the word "car" as a conditional branch phrase by selecting **Contains** and then typing the word "car," any respondent who enters the word "car" is branched to the appropriate question.

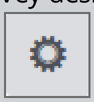
In the case where multiple criteria are needed, the order of each criterion determines the order they are applied in the survey. It is possible, for example, that one criterion may invalidate other criteria if it branches past questions that are referenced in other criteria.

Add Branch to the Survey

Procedure

1 On the **Design** tab of the survey designer, click the **Branching** side tab.

2 On the **Branching** page, click **Add Branch**.

> You can also access the **Add Branch** dialog box by clicking the **Add Branch** link at the bottom of the survey designer page or by clicking the **Add Branch** option in the block or page drop-down menus  in the survey designer.

3 In the **Branch Description** field, enter the name or description of a particular branching rule. It will appear as a link to the **Edit Branch** dialog box in the survey designer. If no description is added, the default link name is **Untitled**.

4 In the destination drop-down list, select the survey question that will appear to the respondent when branching occurs.

If the page order in the block containing the destination page is changed from rotated or randomized to fixed, the destination becomes invalid, and the corresponding message is displayed in the **Edit Branch** dialog box and on the **Branching** page. Also, if the block containing the destination page becomes a child block, the branch becomes invalid, and the corresponding message is displayed in the **Edit Branch** dialog box and on the **Branching** page.

> The pages and questions that belong to the rotated or randomized blocks are not included in the destination drop-down list; such blocks appear as **Block # End** in the list. Also, no child blocks appear in the destination drop-down list, only the parent blocks they belong to.

5 To add branching criteria, click the **Add Another Criteria** link.

6 Click the link next to **Source**, and then select one of the following sources:

- **Current Survey** (default) – Select to apply branching criteria based on the survey questions or device type.

a. In the first drop-down list, click one of the following options to apply the logic to:

  - The survey question
  - The response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions
  - The device type criterion

The device type and the response count criteria can be combined with other criteria for branching.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click one of the following:

- Question choice
- Number of responses provided by the respondent
- Detected type of device

The values list includes the actual response options for the question. The choices are numbered in the same way as the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, type in the expected response or leave the text box empty.

- **Participant Information – Select to apply branching criteria to the campaign:**

a. In the first list, **Campaign Name** is selected.

b. In the second list, click the expression.

c. In the third list, click the needed campaign.

The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply branching criteria based on the location parameter:

a. In the first drop-down list, click the needed parameter.

b. In the second drop-down list, click the expression, and then type the needed value in the adjacent box.

7 To save a single criterion, click **Save**.

8 To add more criteria, click **Add Another Criteria**, and then add several criteria.

You can combine criteria of all types.

9 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion.

10 Click the link next to the **This branch is evaluated after** option. The link displays a question in the survey where the branch will be applied (check point). After clicking the link, the list with all the available survey questions appears. By default, the check point is set to the criteria question that is the furthest from the beginning of the survey.

If the block containing the branch check point is changed from rotated or randomized to fixed, the branch becomes invalid, and the corresponding message asking to select a question in the block is displayed in the **Edit Branch** dialog box and on the **Branching** page. Also, if the block containing the branch check point becomes a child block, the branch becomes invalid, and the corresponding message is displayed in the **Edit Branch** dialog box and on the **Branching** page.

> The pages and questions that belong to the rotated or randomized blocks are not included in the list; such blocks appear as **Block # Start** in the list. For the surveys created in the previous versions of the EFM product, if a check point was set to **Block End** of a fixed block, it is automatically reset to the last question on the last page of the block. Also, no child blocks appear in the check point list, only the parent blocks they belong to.

11 From the list, select the survey question where you want the branch to be applied.

12 Click **OK**.

13 To save the whole set of branching criteria, click **OK**. The added criteria appear on the **Branching** page.

> All branches evaluated on the currently viewed page appear at the bottom of the survey designer page.

Adding Branch advanced options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab > **Add Branch** button.

You can define the advanced branching criteria for your survey logic by combining different criteria using parentheses and **And** / **Or** operators.

Procedure

1. Create a new survey or open a saved survey in the survey designer.
2. On the **Design** tab, click the **Branching** tab in the left pane.
3. On the **Branching** page, click the **Add Branch** button in the upper-right corner. The **Add Branch** dialog box opens, where you can define advanced branching and logic rules for your survey.

> You can also access the **Add Branch** dialog box by clicking the **Add Branch** link at the bottom of the survey designer page or by clicking the **Add Branch** option in the options menu of a corresponding survey element.

4. In the **Add Branch** dialog box, in the **Branch Description** text box, enter the name or description of a particular branching rule. It will appear as a link to the **Edit Branch** dialog box in the survey designer.

> If no description is added, the default link name is Untitled.

5. From the list that follows, select the survey question that will appear to the respondent when branching occurs (destination).
6. Click the **Add Another Criteria** link to add branching criteria. Add several criteria.
7. Select the **Advanced** option next to the **Match** option. The **And** / **Or** operators and parentheses lists appear next to each criterion.
8. Select the parenthesies to group multiple criteria according to your needs.
9. Select the **And** / **Or** operators to combine the defined criteria groups according to the logic that you need for the branch:.
   - the **And** operator denotes that two or more criteria are met at the same time.
   - the **Or** operator denotes that one of the criteria is met.

   For example, in a survey with four pages and four Choose One questions, you can define the following advanced criteria:

   ((Q1=1 OR Q1=2) AND (Q2=1 OR Q2=2)) Or (Q3=1 AND Q4=2)

   In fact, we have six criteria here (Q1=1, Q1=2, Q2=1, Q2=2, Q3=1, and Q4=2) that are combined into advanced criteria by using the corresponding logical operators.
10. Use the following options to the right of each criterion to manage your criteria:
    - **Move Up** – Move the criterion up in the list.
    - **Move Down** – Move the criterion down in the list.
    - **Delete** – Remove the criterion.

11 Click the link next to the **This branch is evaluated after** option; the link displays a question in the survey after which the branch will be applied (check point). By default, the check point is set to the criteria question that is the furthest from the beginning of the survey. The list with all the available survey questions appears.

12 From the list, select the survey question where you want the branch to be applied.

13 Click **OK** to save the whole set of branching criteria. The added criteria appear on the **Branching** page.

> All branches evaluated on the currently viewed page appear at the bottom of the survey designer page.

Branching page structure

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab.

The branches with check points set to the pages from fixed blocks are grouped in page buckets; the branches with check points set to the pages from rotated or randomized blocks are grouped in block buckets. All branches that are evaluated on the same page or block are grouped together in one collapsible bucket. The bucket title appears as the word "Page" or "Block" correspondingly with the page or block number and the page or block name if you have defined it.

By default, all buckets are collapsed. The collapsed buckets display only the number of branches in the bucket. You can expand the buckets to see the branching details by clicking the black down arrow to the left of the bucket title. The expanded buckets display detailed information about the branch: its title or description, criteria, check point, and destination.

You can perform the following actions on each branch by using the corresponding icons to the rightmost of each branch:

- **Move Down** – Move the branch down in the list.
- **Move Up** – Move the branch up in the list.
- **Copy** – Duplicate the branch.
- **Delete** – Remove the branch.

If there are errors in the branch, the corresponding error messages are displayed above that branch. The branches, for which check point questions no longer exist, are displayed in the **Orphaned Branches** bucket.

Improved Criteria Builder

The criteria builder is redesigned with a more intuitive layout. You can see the new layout in the following areas:

- Adding Branching Criteria, page 442
- Create an email trigger, page 1039
- WS Event Handler, page 474
- Filters, page 723
- Filter single report element , page 727
- Add conditional visibility choices rows columns, page 512
- Page Conditional Visibility, page 502
- Question Conditional Visibility, page 509

Branching Edit Criteria

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab > **Add Branch** button.

You can edit branching criteria on the **Branching** tab by using the **Edit Branch** dialog box. You can access the **Edit Branch** dialog box by clicking the branch description link on the **Branching** tab.

When you click the branch description link, the **Edit Branch** dialog box opens. You can edit the existing branching rules and add new criteria by following the same steps as in the **Add Branch** dialog box.

For the steps on how to add a branch, see Adding Branching Criteria, page 442.

Viewing Branching in the Content pane

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > add branches to your survey > **Content** tab.

You can add branches directly from the content pane by using the **Add Branch** link at the bottom of the survey designer page. All branches evaluated on the currently viewed page appear at the bottom of the page. Branches include the criteria summary and destination.

Branches are listed according to their evaluation order (check point).

Only the advanced branching logic is visible in this area. The individual question destinations are visible in the question area.

Errors Validation

The criteria in your logic statements are validated for any errors. If the logic is no longer valid, you will see the error messages in the criteria dialog box. Criteria validation works in the following areas:

- Branching
- Conditional pages
- Conditional questions
- Conditional choices and rows
- Email triggers
- Quotas
- Report filters
- Report element filters

The following logic is verified:

Does the check point exist?

Error messages:

- Check Point Block {0} does not exist.
- Check Point question {0} does not exist.

Does the destination exist?

Error messages:

- Destination Block {0} does not exist.
- Destination question {0} does not exist.

Does the branch have any criteria?

Error message:

- No criteria set.

Does the criteria heading still exist and is valid?

Error messages:

- Comparison question {0} does not exist.
- Comparison choice {0} does not exist in question {1}.
- Comparison topic {0} does not exist in question {1}.
- Question element {0} does not exist.
- Comparison question {0} has a dynamic topic list.

Is the expression valid for the field data type?

Error message:

- Expression {0} is invalid for question {1}.

Is the value still valid?

Error messages:

- Choice count {0} is out of range for question {1}.
- Comparison value {0} for question {1} must be numeric.
- Comparison value {0} for question {1} must be a valid date.

Branching Tab destination view

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab > **Destinations** button.

You can toggle between two types of view—**Branches** and **Destinations**. The **Branches** option is selected by default. With the **Destinations** view selected, you can see all survey's destinations in one place so that you do not have to visit every question and choice individually. When you switch to the **Destinations** view, you can see the list of survey pages as collapsible sections. By default, the page sections are collapsed. You can expand the sections to see all destination details by clicking the black right arrow to the left of the section title.

The expand/collapse settings are not saved across the sessions. When you re-open the **Branching** tab, all sections are collapsed, including previously expanded. The section title appears as the word **Page** with its number, for example, **Page 3** and the page name if you have defined it. The expanded page section displays all questions that the corresponding page contains.

You can set the destination for choices and questions by using the destination drop-down list. Destination is a page or question that the respondents will see after they answer the current question. The available options are **Not Set**, **End**, and all questions that follow the current question. The **Not Set** is a default option.

Procedure

1. In the **Design** view, create a new survey or select an existing survey from the **My Surveys** grid.
2. Click the **Branching** tab in the left pane.
3. On the **Branching** page, click the **Destinations** button in the right content area.
4. To find the question or choice you need, in the **Destinations** view, click the black right arrow to the left of the page or block section.
5. From the corresponding drop-down list, next to the question or choice, select the destination point for that survey question or choice.

If the block containing the destination question or choice is changed from rotated or randomized to fixed, the destination is cleared. Also, if the block containing the destination question or choice becomes a child block, the destination is cleared.

> The pages and questions that belong to the rotated or randomized blocks are not included in the question and choice drop-down lists; such blocks appear as **Block # Start** in the lists. Also, no child blocks appear in the question and choice drop-down lists, only the parent blocks they belong to.

Exporting Branches and Destinations

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Branching** tab > **Add Branch** button > **Actions** menu > **Export** option.

When you export a survey, you can include the survey branching logic into the export file. The following logic is exported:

- Advanced branching
- Question destinations
- Choice destinations

The branches and destinations appear at the end of each survey page according to their evaluation order.

Based on the export example above:

- Destination: Page 2 (Set in 3. Color (red)) is a choice destination with the criteria.
- Destination: Survey Submitted (Set in 3. Color) is a question destination with the criteria.
- Branch to: Page 3 (3. Color = green OR 3. Color = blue) is the advanced branching logic with the criteria.

To test, create a survey with advanced branching. Then, export your survey to MS Word or Adobe PDF and see the visual references included in your export file as in the example above.

If you use an MS Word file, import to create your survey, the branching logic is imported as a "comment" in the questionnaire. In order for this functionality to work properly, you need to manually program this functionality (branching logic) once you complete the import.

Procedure

1. On the **My Surveys** page, open a survey with branching.
2. In the **Actions** menu on the toolbar, point to **Export**, and then select the **Microsoft Word** or **PDF** option.
3. When exporting to the Microsoft Word format, select the **Content Review** survey type to export all the survey branching, and then click the **Export** button. The export file is generated in the selected format.
4. Click the link with the file name to save or open the file.
5. Click **Close**. The branches and destinations appear at the end of each survey page in the order in which they will be evaluated.

Advanced Branching and Destination Logic Rules

The order of priorities for logic is as follows:

1 Advanced Branches (If more than one exists for a check point, they are evaluated in branching order. Advanced branches always take precedence over destinations.)

2 Destinations

- Choice Destinations
- Question Destinations

Choice and Question destinations are evaluated in question order. If the first question on a page has a destination, and the second question has a choice destination, the question destination will win. However, if a question has both a choice and question destination on it, the choice destination will win.

Quotas

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Quotas** tab.

With the **Quotas** feature, you can set quotas to limit the number of participants who can respond to your survey, and add the criteria for excluding a respondent from the survey. For example, you can limit the survey responses to a gender, age group, income level, product purchased, or geographic location.

If multiple people access the survey and complete the survey questions, it allows the number of responses to be slightly in excess of the quota limit. Thus, it is recommended that survey invitations be sent to participants by batches and not all at once.

> The **Quotas** tab is available in the **Design** and **Collect** view if you have a license for the **QuotaManagement** feature.

After clicking the **Quotas** tab, the following page opens where you can select the quota evaluation method, set the response limit, and add individual quotas.

You can select one of the following quota evaluation methods:

- **Started Responses, Allow Overages**

  Every started response counts against the quota. Completed responses are not guaranteed because participants may leave the survey or meet another quota. Participants can complete a survey that has been started before the quota is reached.
- **Completed Responses, Allow Overages**

  Only completed responses count against the quota. Participants can complete a survey that has been started before the quota is reached.
- **Completed Responses, Do Not Allow Overages**

  Only completed responses count against the quota. When the quota is reached, all participants currently taking the survey will be directed to an end page.

Under the **Options** section, you can do the following:

- **Limit total number of responses to** – Select this check box to set the response limit for your survey, and then type the number in the provided box.
- **Add Quota** – Click this link to set individual quota criteria to exclude certain responses from your survey. For details about adding quota criteria, see Add quota criteria, page 459.

> To update the quota settings for the open survey, click the **Apply Changes** button in the **Design** or **Collect** view.

After adding individual quotas, they appear as rows on the **Quotas** page. If the **Limit total number of responses to** check box is selected, the **Total Responses** quota row appears. It tracks the total number of responses and displays the same information as other quota rows.

When you add or edit the quota criteria in an open survey, participants who pass the survey and meet the quota criteria will be counted in the quota row, but the **Over Quota** status and the **Quota Reached** page will appear only after you apply the changes.

You can manage quota rows as follows:

- Reorder quota rows by dragging them.

- View the status of each quota row. Quota can have one of the following statuses:
  - **Gray** – No respondents meet a quota.
  - **Yellow** – Quota is in progress.
  - **Green** – Quota is complete.
- Open the **Quota Management** dialog box by clicking the quota title.
- View the progress details on the progress bar.

To view the percentage of quota progress, point to the progress bar.

- Duplicate and delete the quota row by clicking or icon correspondingly.

Add quota criteria

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Quotas** tab > **Add Quota** button > **Quota Management** dialog box.

With the **Add Quota** option, you can set the criteria to exclude certain respondents from the survey. For example, you can limit the survey responses to a gender, age group, income level, product purchased, or geographic location.

Procedure

1 On the **Quotas** page, click the **Add Quota** button or the **Add Quota** link (if any quotas already exist).

2 In the **Quota Management** dialog box, in the **Description** box, type the name or description of the quota criteria.

3 In the **Limit** box, type the number of responses to be collected for the given criteria.

4 Click **Add Another Criteria**.

5 Click the link next to **Source**, and then in the drop-down menu, click one of the following options:

- **Current Survey** (default) – Click the name of your survey to apply quota criteria based on the survey questions or device type.

a. In the first drop-down list, click the survey question to apply the logic to.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click the question choice.

- **Column** – Select one of the following options:
  - **Participant Information** – Apply quota criteria to the campaign name parameter. This type of source is designed for use with multiple-campaign surveys (seeAdding multiple campaigns to survey, page 586).

> This option is available if at least one campaign is added to the survey.

  - **Respondent Location** – Apply quota criteria to the location parameter. You can use these criteria to limit the survey responses based on a city, country, state, zip or postal code.

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as a choice identifier.

6 To save a single criterion, click **Save**.

7 To add more criteria, click **Add Another Criteria**, and then add several criteria.

8 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion.

Criteria can be based on more than one question and are checked for logic when a survey participant clicks the **Next** or **Jump** button.

9 Click **OK**.

Branching in quotas

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Quotas** tab.

You can set how the respondents that reach the **Branched Out** end page are counted against the quota limit.

When you set the general quota to **Completed Responses, Allow Overages** or **Completed Responses, Do Not Allow Overages** and limit a total number of responses, only the responses marked as Complete are counted against the limit. In this case Started, Over Quota, and Branched Out responses are not counted against the limit. The Branched Out responses are counted as complete only if the **Branched Out** end page is set to Completed (for details, see Branched Out and Over Quota on the End Pages, page 400).

Triggers overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Triggers** tab.

You can define email and case triggers and alerts for your survey based on the specific survey responses and respondent location. You can set case and email triggers at a time. You can also send messages to any email address and create cases when a respondent submits a certain answer, a defined combination of several answers, or belongs to a specified location.

When you click the **Add Trigger** button at the right side, the **Add Trigger** dialog opens where you can define criteria for your triggers, create an alert message, and specify a person who receives an email and details of the case that is created based on the respondent's answers or location.

Triggers are activated after a respondent clicks the **Submit** button or the **Save** button or after a respondent is directed to the end of the survey through branching logic. If you want the trigger to be sent on survey submission only, set up the criteria for the trigger on the last survey page.

The case triggers are available only if you have a license for the Case Management feature.

In the **Add Trigger** dialog, the following options are available:

- **Description** – Enter a short summary of the trigger in the text box.
- **Trigger Action** – In the drop-down list, click the trigger action that will be performed when a respondent submits a certain answer, a defined combination of several answers, or a specified respondent location. The following options are available:
  - **Send Email**
  - **Create a Case**
  - **Create a Case and Send Email**

Depending on the trigger action, multiple tabs are displayed in the dialog:

- **Criteria** – Add the criteria for sending an email and/or case trigger.
- **Email** – Create an alert message and specify a person who receives an email when respondents match the selected criteria.
- **Case Details** – Define the details of the case that will be created based on the specific respondent's answer or location.

Criteria tab

To add a criterion, click the **Add Another Criteria** link. The **Criteria** section expands where you can specify the source for your trigger: a survey or a respondent location. For survey, specify the test question, expression, value, and operator if you have multiple criteria. For respondent location, specify state or province, city, ZIP or postal code, and country.

If you select **My Survey** as a source, you can specify the following:

- **Question** – Specify the question to be checked against the criteria by selecting it from the drop-down list.

- **Expression** – Select the expression from the drop-down list. The available options vary depending on the question type.

For example, the **Choose One** questions support the following expressions:

- Equal To
- Not Equal To
- Less Than
- Greater Than
- Less Than Or Equal
- Greater Than Or Equal

The **Fill in the Blank** questions support the following expressions for text responses:

- Equal To
- Not Equal To
- Contains
- Does Not Contain
- Begins With
- Ends With

- **Value** – Click the response option in the drop-down list. The available options vary depending on the question type. For example, the **Choose One** questions include all response options, and the **Fill in the Blank** questions have a blank text box.
- **Save** – Click the link or anywhere else in the dialog to save your criterion.

If you add multiple criteria, you can combine them using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The drop-down lists with parentheses and the **And / Or** operators appear next to each criterion.

In the dialog, you can copy, move up or move down, and delete the criteria. To edit the criteria, click its name.

After you create the criteria, click the **Email** or **Case Details** tab depending on the type of the trigger you have selected.

Email triggers

Navigation

Design & Collect tab > **Triggers** tab > **Add Trigger** button.

Use the Email Triggers feature to add email triggers and alerts to your survey based on specific survey responses. It is possible to send messages to any email address when a respondent submits a certain answer, a defined combination of answers, or a specified respondent location.

For the email triggers, you need to define criteria for your triggers, create an alert message, and specify a person who receives an email when respondents select the specific answer or belong to a specified location.

You can pipe different fields in your message body and the To, Cc, or Bcc field using the Piped Value icon on the tool bar. To insert the piped value in the To, Cc, or Bcc field, add the piped value to the message body and then copy and paste the value into the To, Cc, or Bcc field. When you send your email, the piped field is replaced by the appropriate value.

> The question containing the piped value must be on the previous page in relation to the criteria for the trigger, otherwise the piping does not work.

You can also edit the HTML of your message in the email trigger to modify the appearance of your message. The HMTL option is available in the lower-left part of the dialog box.

How to Create an Email Trigger

1. On the Triggers side tab in the survey designer, click the Add Trigger button.
2. In the Add Trigger dialog box, in the Description text box, enter a short summary of the trigger.
3. In the Trigger Action drop-down list, click Send Email.
4. On the Criteria tab, click the Add Another Criteria link.
5. Click the link next to Source, and then select one of the following sources:

- Current Survey (default) – Select the filter parameter, expression, and value from the drop-down lists:
  a. In the first drop-down list, click one of the following options to apply the logic to:
     - Survey question
     - Response count criterion with the values from 0 to the specific number of choices or columns in Choose Many, Matrix with Choose One or Choose Many sides, or Scrolling Matrix questions
     - Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

  b. In the second drop-down list, click the expression.
  c. In the third drop-down list, click one of the following:
     - Question choice
     - Number of responses provided by the respondent

- Detected type of device

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as an identifier for the choice.

- Participant Information – Select the filter parameter, expression, and value from the drop-down lists:
  a. In the first drop-down list, Campaign Name is selected.
  b. In the second drop-down list, click the expression.
  c. In the third drop-down list, click the needed campaign.

> The Campaign Name source is available only after you add at least one campaign on the Collect tab.

- Respondent Location – Select the filter parameter, expression, and value from the corresponding drop-down lists:
  a. In the first drop-down list, click the needed parameter.
  b. In the second drop-down list, click the expression, and then type the needed value in the adjacent box.

6 Click the Save link to save your criteria.

7 Click the Add Another Criteria link to add more criteria.

8 Specify if either all or any of the criteria need to be met by selecting the corresponding Match option.

9 Click the Email tab.

10 In the To field, type the email address of the person to be notified by the trigger.

11 In the Cc (carbon copy) and Bcc (blind carbon copy) fields, type the email addresses if required.

> Recipients in the Cc and Bcc fields also get the message. The names of the recipients in the Bcc field are not visible to other recipients.

12 In the Subject field, type the message short description.

13 In the message body, type the content of your email. You can customize the text by using the additional editing options from the tool bar. You can also pipe different fields in your message using the Insert Piped Value icon EmailTriggers6.png on the tool bar.

14 Click OK. The created trigger appears on the Triggers tab.

From address in email triggers

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** tab > create a new survey or open an existing one > **Design** view > **Triggers** tab > **Add Trigger** button > **Add Trigger** dialog box > **Criteria** tab > **Email** tab.

You can specify different email addresses in the **From** field in an email trigger. The **From** address is a sender's email address. By customizing the sender's email address, you increase the probability that the email is opened and prevent it from being sent to the **Junk Email** folder.

The administrator of a workgroup can activate this functionality and define the list of email addresses to be used on the **Administration** > **Mail Setup** tab.

Emails from this list are available in the From list when you create an alert message for the email trigger.

Add an email address to the list

Procedure

1. Go to the **Administration** tab, and then click the **Mail Setup** tab in the left pane. The **Mail Setup** page opens.
2. In the **From Address** section, select the **Enable all emails in the list below to be used as From addresses on invitations, reminders and email triggers** check box.
3. Click the **New** button. The **Add Email** dialog box opens.
4. Enter the email address you want to add in the **Email Address** field.
5. Enter the name of the email sender in the **Display Name** field.
6. Click **OK**.
7. Click the **Save Setup** button.

Delete an email address from the list

Procedure

1. Go to the **Administration** tab, and then click the **Mail Setup** tab in the left pane. The **Mail Setup** page opens.
2. In the **From Address** section, select the **Enable all emails in the list below to be used as From addresses on invitations, reminders and email triggers** check box.
3. Select the email address you want to delete from the list.
4. Click the **Delete** button.
5. Click the **Save Setup** button.

Case triggers

Navigation

Design & Collect tab > **Triggers** tab > **Add Trigger** button.

You can define case triggers to create cases based on the specific survey responses and respondent location. For the case triggers, you need to define criteria for your triggers and specify a person who receives the details of the case that is created when respondents select the specific answer or belong to a specified location.

The case triggers are available only if you have a license for the **Case Management** feature and the **Case Administration** > **Cases** permission enabled.

On the **Case Details** tab, in the **Add Trigger** dialog box, you can add the following information for the case:

- Assigned to
- Priority
- Title
- Notify Users
- Case Description

Optional fields:

- Contact's Email
- Contact's First Name
- Contact's Last Name
- Contact's Business
- Contact's Phone

Create a case trigger

Procedure

1. On the **Triggers** tab in the survey designer, click the **Add Trigger** button.
2. In the **Add Trigger** dialog box, in the **Description** text box, enter a short summary of the trigger.
3. In the **Trigger Action** drop-down list, click **Create a Case**.
4. On the **Criteria** tab, click the **Add Another Criteria** link.
5. Click the link next to **Source**, and then select one of the following sources:
   - **Current Survey** (default) – Select the filter parameter, expression, and value from the drop-down lists:

   a. In the first drop-down list, click one of the following options to apply the logic to:
      - Survey question
      - Response count criterion with the values from 0 to the specific number of choices or columns in Choose Many, Matrix with Choose One or Choose Many sides, or Scrolling Matrix questions

- Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click one of the following:

- Question choice
- Number of responses provided by the respondent
- Detected type of device

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as an identifier for the choice.

- **Participant Information** – Select the filter parameter, expression, and value from the drop-down lists:

a. In the first drop-down list, Campaign Name is selected.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click the needed campaign.

> The Campaign Name source is available only after you add at least one campaign on the Collect tab.

- **Respondent Location** – Select the filter parameter, expression, and value from the corresponding drop-down lists:

a. In the first drop-down list, click the needed parameter.

b. In the second drop-down list, click the expression, and then type the needed value in the adjacent box.

6 Click the **Save** link to save your criteria.

7 Click the **Add Another Criteria** link to add more criteria.

8 Specify if either all or any of the criteria need to be met by selecting the corresponding **Match** option.

9 Click the **Case Details** tab.

10 In the **Assigned to** text box, type the name of the workgroup member, to whom you want to assign the case. By default, the case is unassigned. The **Assigned to** text box is an autocompletion text box.

> You can also pipe values in the Assigned to text box from any question in the survey by typing the placeholder value in the text box, for example, %Q1_1%. You can pipe the user name or email. When the trigger is activated, the piped value is matched to a user name or email. If no match is found, the case is unassigned.

11 In the **Priority** drop-down list, click the case priority. **4 - Medium** is the default option.

12 In the **Title** text box, type the case summary.

13 In the **Notify Users** text box, enter the names of the persons to receive a notification that a new case is created. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

14 In the **Case Description** text box, type the case description. You can customize the case description by using the additional editing options from the toolbar.

> You can also pipe different fields in your case description using the Insert Piped Value icon on the toolbar.

15 In the **Contact's Email** text box, enter the email address of the person, who can provide the detailed information about the case.

16 In the **Contact's First Name** text box, type the first name of the contact person.

17 In the **Contact's Last Name** text box, type the last name of the contact person.

18 In the **Contact's Business** text box, type the company name of the contact person.

19 In the **Contact's Phone** text box, type the phone number of the contact person.

20 In the **Custom Properties** section, select the custom case property. The case properties are available only if specified on the **Case Setup** tab by **Case Administrator**.

21 Click **OK**. The created trigger appears on the **Triggers** tab.

Piping Responses in the Case Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > add a **Choose One** or **Fill in the Blank** question > **Triggers** tab > **Add Trigger** button.

You can pipe question responses into the custom properties of the cases created by triggers. When the trigger is activated, the response used by trigger criteria is applied to the newly created case as a custom property.

The case triggers are available only if you have a license for the **Case Management** feature.

When the survey responses are piped into a case custom properties, the system maps them to the available property choices. If they match, the case property is set. If they do not match, the response is added to the choices' list of the custom property, but not applied to the case. In the multiple language surveys, only the default survey language is used for matching and adding the custom properties.

- For the **Choose One** question, the responses are piped into the **Choose One** custom property type.
- For the **Fill in the Blank** question with the **Dates** input type, the responses are piped into the **Date** custom property type.
- For the **Fill in the Blank** question with the **Text** input type and the **Choose One** question with the activated **Please Specify** option, the responses are piped into the **Date** custom property type.

You can create multiple properties from a single response.

Procedure

1. On the **Content** tab of the survey designer, add a **Choose One** question to the survey.
2. On the **Triggers** tab, click the **Add Trigger** button.
3. In the **Add Trigger** dialog box, in the **Description** text box, enter a short summary of the trigger.
4. On the **Trigger Action** menu, select the **Create a Case** option.
5. On the **Criteria** tab, define the trigger criteria.
6. Click the **Case Details** tab.
7. On the **Case Details** tab, define the case details.

The case properties are available only if specified on the **Case Setup** tab by Case Administrator.

8. In the **Custom Properties** section, click the icon next to the custom property into which you want to pipe the survey response.
9. In the **Insert Piped Value** dialog box, select the question that you want to use for piping.
10. Click **OK**.
11. In the **Add Trigger** dialog box, click **OK**.

Advanced Tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab.

You can add advanced properties to your survey when you create or edit it in a survey designer.

On the **Advanced** tab, the following options are available:

- Advanced Features Survey Glossary, page 472 – Define the keywords you want to highlight and explain within your survey. Click the option and type a keyword with its definition to clarify it for your survey participants.
- WS Event Handler, page 474 – Enter your own Web Services provider for advanced integration options. Click the option to specify the URL and select when the survey engine calls the Web Service.

> This option is available if you have a license for the **Web Service** feature.

- Advanced Features Scoring, page 477 – Assign scores to questions in your survey and indicate to respondents whether they succeed or fail to reach the specified score. Click the option to create passing and failing score messages, specify a minimum score to pass, and assign scores to answers.
- Version History, page 478 – View and restore the previous version of your survey. Click the option and select the version you want to restore.
- Editing Survey HTML, page 479 – Upload, download, and edit your survey HTML. This option becomes available when you open your survey. The **Edit HTML** property is available only in classic survey rendering mode.

> Modifying the HTML of a survey has several risks. To avoid them, use the **Code Block** functionality, specifically designed to allow you to customize your survey without these risks. To learn more about code blocks, see Code Blocks, page 489.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering mode is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- All Survey Spell Check, page 481 – Ensure that all words are spelled correctly within your entire survey.

Advanced Features Survey Glossary

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **Survey Glossary** option.

With the **Survey Glossary** advanced option, you can explain the keywords in your survey that can be unfamiliar to your survey participants. Click the **Survey Glossary** option and type a keyword with its definition to clarify it. The keywords are marked with a dotted line in your survey. Your survey participants can hover over a keyword to view its definition in a tooltip.

Switch to **Preview** mode to test your survey glossary term.

The keywords that you create using the survey glossary are not added automatically to the custom spell check dictionary. See the **Steps** section in this topic for the procedure of adding survey glossary terms to the custom dictionary.

You can access the **Survey Glossary** option on the **Design** tab in the **Advanced Properties** section.

Add a Keyword to Survey Glossary

Procedure

1 On the **Advanced** tab, in the **Advanced Properties** section, click **Survey Glossary**.

You can define the relevant language for your keyword using the provided list.

2 Click the **New Keyword** link. Type a new keyword in the **Keyword** box in the right pane.

3 Type the definition of your keyword in the text area.

4 Click **OK**.

To avoid entering the insecure code into **Survey Glossary**, on the **General Setup** page, select the **Automatically remove insecure code from survey designer** check box. For more information, see General Setup, page 1406.

Delete a Keyword

1 On the **Advanced** tab, in the **Advanced Properties** section, click the **Survey Glossary** option.

2 In the dialog box, select the keyword you want to remove.

3 Click the **Delete** icon .

4 Click **Delete** in the confirmation dialog box.

Add a Keyword to Custom Dictionary

Procedure

1. On the **Advanced** tab, in the **Advanced Properties** section, click the **All Survey Spell Check** option.
2. In the **Spell Check** dialog box, select the needed word, and click the **Add Custom** button.
3. Click **OK** in the confirmation dialog box to add your glossary term to the custom dictionary.

WS Event Handler

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **Web Services Event Handler** option.

With the **Web Services Event Handler** advanced option, you can use your own Web Services provider to handle survey events.

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For the EFM contact information, Getting Started overview, page 49.

Click the option to specify the URL of an external Web Service and select when the survey engine calls the Web Service.

> The **Web Services Event Handler** option is available if you have a license for the Web Service feature.

You can access the **Web Services Event Handler** option on the **Design** tab under the **Advanced Properties** section.

After selecting the **Web Services Event Handler**, the **Web Service** dialog box opens, where you can specify the URL to the Web Service and select when you want events to occur in your survey. You can also specify an email address to receive notifications when your Web Service fails.

Use examples

- A receipt code survey where custom business logic validates what the respondent enters.
- Recording survey responses simultaneously to alternative data stores within your company.
- Changing the rendering of the survey for specific participants.
- Custom validation.
- Piping in custom data for the participant from an alternative data store (such as a CRM system).

> For more information about **Web Services Event Handler**, see the *EFM Web Services Technical guide*.

Format

You can select the format of the Web Service Event Handler call outs: JSON or XML.

> This option is available only for **Modern** survey rendering mode. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Authentication Token

With the **Web Services Event Handler**, you can provide an authentication token for your Web Service. You can set up a user name and password when calling the external Web Service. The **Authentication Token** field is optional.

Show Error Page on Event Handler Errors

If the survey event handler is unavailable, then the error page is shown notifying you that the web browser could not link to the requested survey page and listing possible solutions. This option is selected by default.

Notify the email address about Web Service Errors

You can set up receiving the email notifications when your Web Service fails. You can enter the needed email in the corresponding text box. The following information is available in the email message: event, URL, survey, respondent, and error. This option is selected by default.

Control Over Events Occurrence

You can select when the survey engine calls the Web Service as follows:

- **Survey Start** – Calls the Web Service when participants begin the survey. Only preloaded data is sent from the survey engine to the Web Service during this event.
- **Page Submit** – Calls the Web Service while participants are completing the survey. You can select the following options from the drop-down list:
  - None (fast)
  - Only the Responses Submitted for the Page (average)
  - All Non-empty Responses for the Survey (slow)
- **Survey End** – Calls the Web Service when participants complete the survey. All response data is sent from the survey engine to the Web Service during this event.
  - None (fast)
  - Only the Responses Submitted for the Page (average)
  - All Non-empty Responses for the Survey (slow)

Pre-Save and Pre-Response Check Boxes

- **Pre-Save** – Called before data is saved to the database. This option allows the Web Service to stop or change data from being saved to the response table.
- **Pre-Response** – Called before the page is rendered back to the respondent. This option allows the Web Service to return a table of replacement fields that the survey engine will expand and replace on the page about to be displayed to the respondent.

Response Data Sent

You can select when you want events to occur in your survey. For example, the survey author can have the event occur at the start of a survey or at the start of the survey and every page in the middle of the survey.

Procedure

1 On the **Advanced** tab, click the **Web Services Event Handler** option.

2 In the **URL** box of the **Web Service** dialog box, type a valid URL to the Web Service.

> You can pipe data in the **URL** box from the survey data.

3 In **Modern** survey rendering mode, in the **Format** drop-down menu, select the **JSON** or **XML** format.

4 In the **Authentication Token** box, type the security token. (This field is optional.)

5 To receive email notifications when your Web Service fails, select the **Notify Survey Author on Web Service Errors** check box. By default, this option is selected.

6 Select when the survey engine calls the Web Service.

> To ensure that the Web Service is called correctly, test the functionality by clicking the **Test** button.

7 Click **Save**.

Advanced Features Scoring

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **Scoring** option.

With the **Scoring** advanced option, you can assign scores to questions in your survey and show respondents whether they succeed or fail to reach the specified score. Click the option to create the passing and failing score messages, specify a minimum score to pass, and assign the scores to each response.

The **Scoring** option is available on the **Design** tab > **Advanced Properties** section.

After clicking the **Scoring** option, the dialog box opens where you can define the following settings:

- **Calculate scores for this survey** – Select this check box to calculate scores for the current survey.
- **Passing Score Message** – Type the message that appears to respondents who pass your survey. You can pipe values from the survey into this box.
- **Failing Score Message** – Type the message that appears to respondents who fail to pass your survey. You can pipe values from the survey into this box.
- **Minimum Score to Pass** – Define the minimum score value to pass your survey.

> To update the data in the dialog box and save changes, click the **Refresh** button.

Scoring piped values

You can use different placeholders to show a respondent's score and result.

> Insert the placeholders on the next page in relation to the questions to be scored.

- **To show a respondent's score** – Insert the **%PdcScore%** placeholder either in the survey question text or on the survey end page.
- **To report on a respondent's score** – Create a **Fill in the Blank** question on the last survey page and insert the **%PdcScore%** placeholder in the **Preselected** field. Respondent does not see this score, so it is recommended that you hide this question.
- **To show a respondent's result** – Insert the **%PdcScoreResult%** placeholder to show the passing or failing score message based on the respondent's score and the minimum score to pass the survey. Insert the placeholder on the survey end page only.

Version History

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **Version History** option.

With the **Version History** advanced option, you can view and restore the previous version of your survey. Click the option and select the version you want to restore. The history of the last twenty changes of your survey is available.

You can restore the changes made in a survey designer only. Other changes are not reset, for example, publishing the survey.

The **Version History** option is available on the **Design** tab > **Advanced Properties** section.

After clicking the **Version History** option, the following dialog box opens where you can select the survey version you want to restore.

- **Version** – Number of the change made to the survey.
- **Date** – Day and time of the change.
- **User Name** – Name of the user who made the change.
- **Description** – Short summary of the change.

Procedure

1. On the **Advanced** tab, click the **Version History** option. A dialog box opens.
2. Select the survey version you want to restore.
3. Click the **Restore** button. Your survey is updated in a survey designer.

Editing Survey HTML

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **Version History** option.

The **Edit HTML** property is available only in classic survey rendering mode.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

The **Edit HTML** functionality will be removed in a future release. You can use the **Code Blocks** functionality to customize your survey instead.

You can edit your survey HTML in the HTML editor or locally by downloading it to your computer. The changes can be uploaded back into the application environment. At the top of the **Survey HTML Editor** dialog box, you can select the survey language from the corresponding drop-down menu and view the **Page** menu with the following options:

- Page
- End Pages
- Invalid Access Page
- Jump Page

On the toolbar, the following options are available:

- **Download** – Use to download the selected page to the local machine to edit HTML outside the application.
- **Upload**– Use to upload the edited HTML from your computer into the application.
- **Revert** – Use to revert the changes made in the HTML to the state in which it was opened.
- **Save** – Use to save all the changes.

Download Survey HTML

Procedure

1. On the **Advanced** tab, click **Edit HTML**. The **Survey HTML Editor** dialog box opens.
2. On the toolbar, click **Download**. The **Download HTML Files** dialog box opens.
3. Click the survey page you want to download. The page is downloaded to your computer.
4. Click **Back** to return to the **Survey HTML Editor** dialog box.

Upload Edited Survey HTML

Procedure

1 On the **Advanced** tab, click **Edit HTML**. The **Survey HTML Editor** dialog box opens.

2 On the toolbar, click the **Upload** button. The **Upload HTML Files** dialog box opens.

3 Click the **Browse** button to locate your HTML file.

4 Click **OK**. You have now uploaded the HTML file.

5 Save the changes.

All Survey Spell Check

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Advanced** tab > **All Survey Spell Check** option.

With the All Survey Spell Check advanced option, you can ensure that all words are spelled correctly within your entire survey.

You can access the All Survey Spell Check option on the **Design** tab in the **Advanced Properties** section.

> You can also use the **All Survey Spell Check** option for individual questions when you edit a question in a survey designer.

After selecting the **All Survey Spell Check**, the **Spell Check** dialog box opens where you can view and manage the incorrect or specific words in your survey.

- **Not in Dictionary** – In this section, the word that is not found in the EFM dictionary is highlighted in bold.
- **Suggestions** – In this section, the potential spelling variations of the found word appear.

You can use the following functionality to manage the found words:

- **Ignore** – Ignores the current missing entry in the dictionary and proceeds to the next missing entry.
- **Ignore All** – Ignores all occurrences of the missing entry during the current spell check.
- **Add Custom** – Adds the missing entry to the custom dictionary.
- **Change** – Replaces the found word with the highlighted suggestion or with the edits you make manually in the **Not in Dictionary** section.
- **Change All** – Replaces all occurrences of the found word with your changes.

Check Spelling in All Survey

Procedure

1. On the **Advanced** tab, click the **All Survey Spell Check** option. The **Spell Check** dialog box opens with the potentially incorrect word highlighted in bold.
2. Select the correct word in the **Suggestions** section.

> You can also edit the found word in the **Not in Dictionary** section.

3. Click **Change**.
4. Click **OK** when the message appears that the spell check is complete.

Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Properties** tab.

On the **Properties** panel, you can set general properties for your survey operation, edit the survey description, define the survey owner, access portal options related to your survey, view your survey statistics, and create custom survey properties.

The **Properties** tab is available on the left-hand side of the **Design** view.

The survey properties include the following sections:

- General, page 482
- Portal Options, page 485
- Statistics, page 485
- Custom Properties, page 485

General

In the **General** section, you can define the following properties:

- **Allow respondent to update a completed survey** – Allow respondents to change their survey responses after completing the survey.

  You can edit the message that appears to the respondents when they try to update a completed survey under the **End Pages** section on the **Pages** tab.
- **Resume survey from last page** – Automatically direct respondents to the last visited survey page if they save the survey and try to access it again.

> The **Allow respondent to update a completed survey** and **Resume survey from last page** options are unavailable while your survey is in the **Test** mode. This allows you to take the survey more than once while testing it and check the survey logic properly.

- **Track Respondent Information** (selected by default) – Automatically gather the following respondent information upon survey submission:
  - **Respondent Fields**: IP address and HostName.
  - **Respondent System Information**: Record ID, Browser Family, Browser Version, Operating System Family, Operating System Name, and Device Type.
  - **Respondent Location**: City, State/Province, ZIP/Postal Code, Country, Latitude, and Longitude.

> The **Track Respondent Information** feature is not available for SMS surveys.

  You can view the gathered respondent information on the **Manage Participants** and **Manage Responses** pages (by using the **Columns** button).

  Also, you can use the **Respondent Fields** and **Respondent Location** data for filtering:
  - On the **Manage Participants** page
  - On the **Manage Responses** page

  - On the **Reports** page (**Analyze** tab) for filtering reports and report elements
  - On the **Images** page (**Analyze** tab) for filtering images gathered from the responses to the **Image Upload** question

  In addition, you can use the **Respondent Location** data for the following purposes:

  - As a source for conditional visibility for choices, questions, pages, and blocks (for details, see Add conditional visibility for block, page 506).
  - As a source for branching (for details, see Adding Branching Criteria, page 442).
  - As a source for quotas (for details, see Quotas, page 457).
  - To pipe **Respondent Location** values into question or response text (for details, see Piping values in the Question and Response Text, page 531).

- **Block potentially unsafe content from responses** – Detect malicious content in survey responses and protect user information. The HTML and scripts are stripped from the **Essay** and **Fill in the Blank** (textual) responses.
- **Generate Mobile HTML** – Create the mobile version of your survey. When you create a new survey, this check box is selected by default.

  Generate Mobile HTML does not apply to **Modern** survey rendering mode.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **JavaScript Required** – Require participants to activate JavaScript in their browsers to be able to take the survey. By default, this check box is selected for all new surveys. The following survey features require JavaScript:
  - **Choose One** question with the randomized choices
  - **Choose Many** question with the randomized choices
  - **Choose One** question with the **Please Specify** option
  - **Choose Many** question with the **Please Specify** option
  - **Choose One with Image** question
  - **Choose Many with Image** question
  - **Fill in The Blank** question with the **Date** input type
  - **Fill in The Blank** question with the **Numbers** input type and the **Display as Slider** topic option selected
  - Piping URL query in the **Fill in the Blank** question
  - Showing running total in the **Fill in the Blank** question
  - Preselected topics in the **Fill in the Blank** question
  - Character counter in the **Essay** question
  - Indication of the odd and even rows in the **Matrix** question with the **Drop-down** layout
  - Indication of the odd and even rows in the **Matrix** question with the randomized rows
  - Indication of the odd and even rows in the **Matrix** question with the **Hidden** or **Conditional** row visibility criteria
  - Piping in the **Matrix** question columns
  - **Matrix** question with the randomized topics or columns

- **Drag & Drop Rank Order** question
- **Scrolling Matrix** question
- **Scale Slider** question (both **Slider** and **Star** layouts)
- Page conditional visibility (if you disable JavaScript, the same page conditional visibility logic is cleared)
- **Jump** button
- Hierarchical questions
- Code blocks
- Survey glossary
- Allowing the respondent to email the survey end page

If the browser has JavaScript disabled, and you cleared the **JavaScript Required** check box in the **Properties** panel of the **Design** tab, the respondent will be able to take your survey.

- **Allow respondent to uncheck radio buttons** – Allow respondents to clear the previously selected radio buttons if they want to change their answer. This option applies to the **Choose One**, **Matrix** with the **Choose One** side, **Choose One with Image**, and **Rank Order** questions.

This option is available for **Modern** survey rendering mode only.
Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

- **Enable Survey Engine API** – Enable the usage of Survey Engine API. If this option is cleared, the request to Survey Engine API returns an error page. The option is cleared by default. For more information about Survey Engine API, see *Web Services Technical Guide*.

For SMS surveys, **Survey Engine API** is always enabled by default with no option to change it.

Description

Type a description of your survey in the provided text box. This entry is optional. You can use it to remember the function of the survey.

Tags

Add tags to your survey for searching and reporting on your surveys. You can add new tags, view existing tags, and remove the tags you do not need anymore. You can create up to 4 tags for a single survey. You can view tags in an expanded view of the survey on the **Surveys** tab.

Survey Owner

Click the **Edit** link to select and assign an owner to the survey. The survey owner is an EFM user who has a full access to the survey. The survey owner property does not extend the security role assigned to the user account. A survey owner should be assigned a security role similar to the standard "Survey Author" role with respect to survey edit permissions.

Share Access

Click the **Share Survey** link to allow other users to access your survey. For details on the survey sharing, see Share a survey, page 188.

Portal Options

In the **Portal Options** section, you can define the following properties.

> The portal functionality is only available in the EFM if you purchase the EFM Community Builder product.

- **Active Surveys**

  Show estimated time to complete the survey – Select the check box and provide a number in minutes to show your survey participants approximate time they need to complete the survey.
- **Completed Surveys**

  Allow all panelists to see survey results – Select the check box to allow all portal respondents to view the survey results after they complete the survey.

Statistics

With the **Statistics** option, you can view the general data associated with your current survey such as the number of words, questions, pages, and languages.

Custom Properties

With the **Custom Properties** option, you can store and access metadata for your survey. Metadata typically includes the survey title, description of the survey content, author name, and any other survey details. You can use this option to tag your survey for easy identification when you deal with hundreds of surveys. The metadata tag helps you to find the survey you are searching for within your database very quickly.

> This option is available if you have a license for the **Custom Properties** feature.

Click the **Custom Properties** option and define custom properties by creating a set of name and value pairs for your survey. These custom properties are added to the internal system file and are used by your Web Service client.

Comments tab

Navigation

Design & Collect tab > **Comments** tab.

With the **Comments** tab, you can add comments for the survey author or reviewer regarding your whole survey. The survey author, reviewer, or any other user who has access rights to your survey can add their comments too. The added comments appear in the **Survey Comments** pane directly under the text area. The most recent comments appear first. For each comment, you can view the name of a user who entered the comment, the date and time the comment is entered, and the comment itself.

Procedure

1. In the **Design** view, click the **Comments** tab in the left pane. The **Survey Comments** pane opens.
2. Click inside the text area and enter your comments.
3. Click **Submit**.

Text Blocks

Navigation

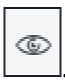
Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab > **Text** button > **Add** menu.

Text block is a non-question content. You can use a text block to add descriptive text about a section or instructions for your questions.

Select whether to show or hide your content in a published survey. The hidden content is only visible to you and is marked accordingly. To set conditions for the content's visibility, click **Conditional**, and then click the **Criteria** link that appears.

The following visibility options are available:

- **Shown** – The text block is shown.
- **Hidden** – The text block is hidden.
- **Conditional** – The text block is shown or hidden according to the certain conditions.

If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

Add a Text Block to Your Survey

1. On the **Content** tab of the **Design** view, click the **Text** button. The text block is added to your survey.

> If your survey contains at least one question or other content, you can add a text block by using the **Add** button or the **Add** menu.

2. Click **Click to edit text**, and then type your text. To cancel the changes, press **Esc**. You can customize the text and add images or media by using the editing toolbar.

> The editing toolbar appears when you edit the text.

Section Headings

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab > **Add** menu > **Section Heading** option.

A section makes it easier for you and participants to navigate the survey. You can arrange the questions, so that relevant information is grouped together. Sections are optional and useful in providing a structure for long surveys. You can use a section to break your survey into smaller pieces (for example, to separate demographic information about respondents from other questions).

> Section Heading is just a means of visual representation of survey sections, and it does not affect the survey logic or any reporting options.

Visibility

Select whether to show or hide your content in a published survey. The hidden content is only visible to you and is marked accordingly. To set conditions for the content's visibility, click **Conditional**, and then click the **Criteria** link that appears.

The following visibility options are available:

- **Shown** – The section heading is shown.
- **Hidden** – The section heading is hidden.
- **Conditional** – The section heading is shown or hidden according to the certain conditions.

> If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

Procedure

1 On the **Content** tab of the **Design** view, click the **Section Heading** button. The section heading is added to your survey.

> If your survey contains at least one question or other content, you can add a section heading by using the **Add** button or the **Add** menu.

2 Click the **Click to edit section heading** text, and then type the text of your section heading, for example, *Demographics Section*. To cancel the changes, press **Esc**. You can customize the text and add images or media to your section heading by using the editing toolbar.

> The editing toolbar appears when you edit the section heading.

3 To use additional options for text formatting and the spelling checker, click the **More** icon .

4 To preview the section heading, click the **Preview** button on the survey designer toolbar.

Code Blocks

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab > **Code Block** button > **Add** menu.

The **Code Block** feature is a better alternative to the survey HTML edits because it saves changes to your custom code even if you republish your survey or the product is upgraded. Additionally, you can include different validation criteria in your survey and add your own warning messages.

In the survey designer, the actual code is displayed. The code is rendered when you preview or test the survey.

Code Block Best Practices

When working with code blocks in the **Modern** survey rendering mode, be sure to follow these best practices:

1. HTML content of survey questions may change from version to version without a publish from the author.
2. IDs will probably be safe between versions.
3. Using methods like .parent() to walk the DOM structure is strongly advised against.
4. Do not rely on any undocumented client-side methods or libraries used by the survey as they may change from version to version without a publish from the author.

Visibility

Select whether to show or hide your content in a published survey. The hidden content is only visible to you and is marked accordingly. To set conditions for the content's visibility, click **Conditional**, and then click the **Criteria** link that appears.

The following visibility options are available:

- **Shown** – The code block is shown.
- **Hidden** – The code block is hidden.
- **Conditional** – The code block is shown or hidden according to the certain conditions.

If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

Add a Code Block to Your Survey

Procedure

1. In the **Add Other Content** area, click the **Code Block** button. The code block is added to your survey.

> If your survey contains at least one question or other content, you can add a text block by using the **Add** button or the **Add** menu.

2 Click the **Click to edit code block text** and enter the code. To cancel the changes, press **Esc**.

3 Click the **Edit in Expanded View** link in the options menu to edit the code in the expanded editor.

> You cannot format the code text.

Insert piped values into code blocks

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

You can insert the piped values into code blocks to enhance your own JavaScript code in the survey.

The Piping functionality requires that source questions and code blocks are separated by a page break.

Procedure

In this example, the **Choose One** question is used.

1 In the **Design** view, add the **Choose One** question.

2 On the next page, in the **Add Other Content** area, click the **Code Block**.

3 Click the **Click to edit code block** text and enter the code.

4 On the editing toolbar, click the icon.

5 In the **Insert Piped Value** dialog box, select the value that you want to insert into the code block, and then click **OK**.

The piped value is inserted into the code block.

Comments

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab > **Comment** button > **Add** menu.

You can use comments to add personal notes about the survey or notes to other users working on the survey. For example, you can add a note asking if a question is necessary or if a certain validation is needed on a particular question. Survey comments provide a means to document questionnaire design workflow.

Comments are visible only to people who work on the survey. They are displayed in **Design** mode, but they are not visible to survey respondents after opening the survey.

Visibility

Select whether to show your content in a survey HTML or hide it. To set conditions for the content's visibility, click **Conditional**, and then click the **Criteria** link that appears. The following visibility options are available:

- **Shown** – The comment is shown in the survey HTML.
- **Hidden** – The comment is hidden from the survey HTML.
- **Conditional** – The comment is shown or hidden according to the certain conditions.

If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

Add a Comment to Your Survey

Procedure

1 On the **Content** tab of the **Design** view, click the **Comment** button. The comment is added to your survey.

> If your survey contains at least one question or other content, you can add a comment by using the **Add** button or the **Add** menu.

2 Click the **Click to edit comment** text, and then type your text. To cancel the changes, press **Esc**.

> You cannot format the code text.

Page Breaks

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page. > **New** menu > **Design from Scratch** option > **Design** view > **Content** tab > **Page Break** button > **Add** menu.

When you insert a page break, a new page is added to your survey. Thus you can create new pages and design a multi-page survey.

A page break is placed at the insertion point in the survey, and the following questions are moved to a new page.

When you publish the survey and view it in a Web browser, the **Next** button appears at each point where a page break is inserted. On the final page of the survey, the **Submit** button appears.

Manage image subfolders

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > add question with the **Add Image** option.

You can create new subfolders to group your images for different purposes and minimize loading time if there are many images in the folder.

Create a subfolder

Procedure

1. In the **Image Manager** dialog box, select the folder for which you want to create a subfolder.
2. On the **Image Manager** menu, click the **Folder** icon.

> To create a new subfolder, right-click the folder, and then click **Create a New Subfolder**.

3. In the **Enter the new folder name** dialog box, change the name of your folder.
4. Click **OK**.

> You can create subfolders in **Group Media** folder if you have the **Upload Group Media** permissions.

Rename a subfolder

Procedure

1. In the **Image Manager** dialog box, right-click the subfolder that you want to rename.
2. On the subfolder shortcut menu, click **Rename**.
3. Edit the name of your subfolder, and then press **Enter**.

> You can rename the **Group Media** subfolders if you have the **Delete Group Media** permissions.

Delete a subfolder

Procedure

1. In the **Image Manager** dialog box, right-click the subfolder that you want to delete.
2. On the subfolder shortcut menu, click **Delete**.
3. In the confirmation dialog box, click **OK**.

You can delete the **Group Media** subfolders if you have the **Delete Group Media** permissions.

Manage media access restrictions

Navigation

Administration tab > **Roles** tab > **Roles** grid > **Create Role** button > **Create Role** page.

You can control the ability to upload and download images and media based on the user role set of permissions.

You can activate the **Images and Media** functionality for a user by creating a new role or editing the existing ones.

> When the Allow User Media option in the Images and Media section is not selected, the user cannot see the file folders in the Image Manager dialog box.

Activate the media access for a new role

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. On the **Roles** page, click the **Create Role** button.
3. On the **Create Role** page, fill the **Name** and **Description** text boxes.
4. In the **Images and Media** section, select the **Allow User Media** check box.
5. Click **Save**.

Disable the media access for a role

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. On the **Roles** page, click the name of the role that you want to edit.
3. On the **Edit Role** page, in the **Images and Media** section, clear the **Allow User Media** check box.
4. Click **Save**.

> By default, the **Allow User Media** check box is selected for all roles.

Upload images to Image Manager

Navigation

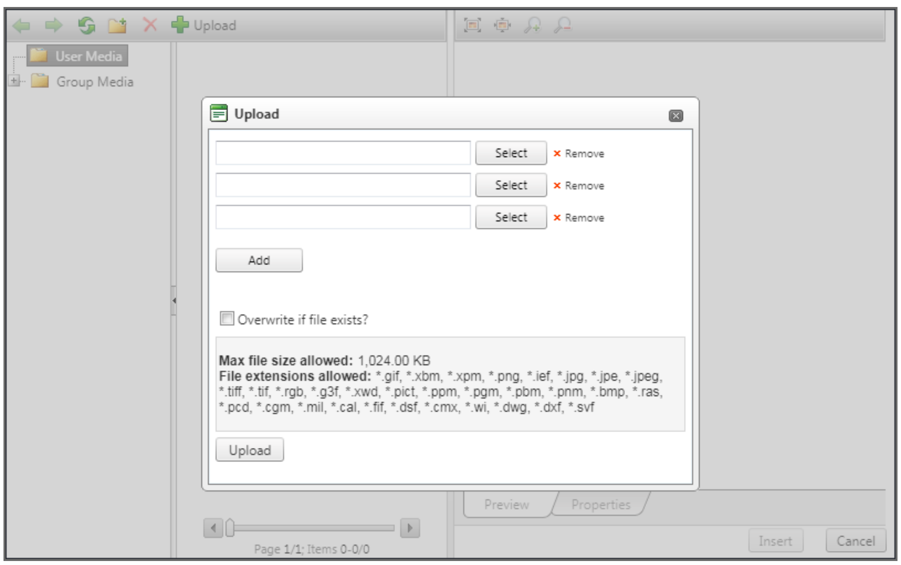
Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Add** menu > select the image-based question > **Add Image** button > **Image Manager** dialog box.

You can upload and place your images in different folders, and then insert them into your survey.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. On the **Analyze** tab > **Content** tab, add the image-based question.
4. Click the **Add Image** button.
5. In the **Image Manager** dialog box, on the toolbar, click the **Upload** button.

In the **Upload** dialog box, you can find the information on the maximum file size and extensions that are allowed.



The Upload dialog box

6. In the **Upload** dialog box, click the **Select** button to locate your image.
7. Select the image, and then click **Open**.

To add many images at once, click the **Add** button. You can also replace the images with the same file name by selecting the **Overwrite if the file exists** check box.

8. Click the **Upload** button.

Add images to questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Add** menu > add question with the **Add Image** option > click the **Add Image** button > **Image Manager** dialog box.

You can add images to the survey questions after uploading them into the **Image Manager** dialog box.

You cannot paste any images directly into the survey questions, topic or choice text, sections, or text blocks.

1 Go to the **Design & Collect** tab > **Surveys** tab.

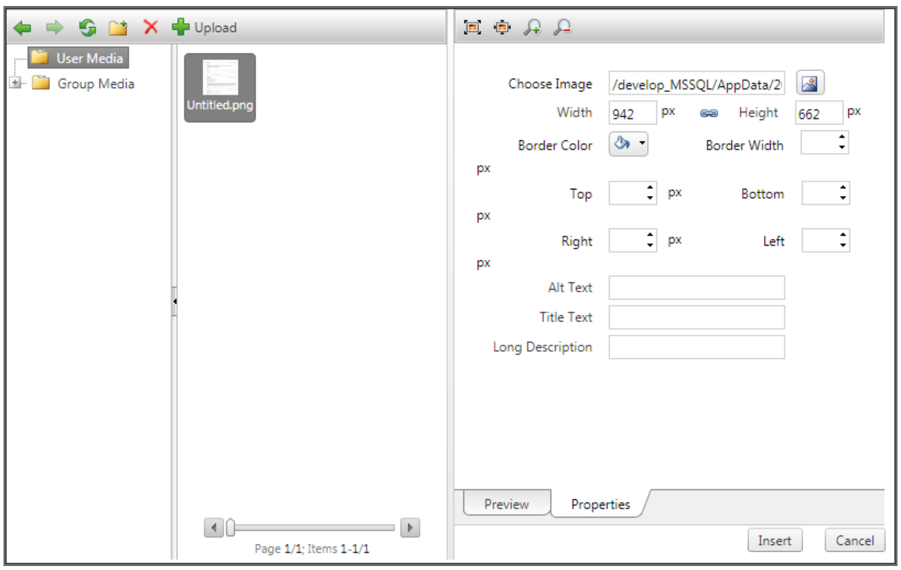
2 On the **My Surveys** page, create a new survey or open an existing survey.

3 On the **Analyze** tab, on the **Content** tab, add the image-based question.

4 Click the **Add Image** button.

5 In the **Image Manager** dialog box, select the image that you want to insert.

The **Preview** and **Properties** tabs become active.



The Properties tab

On the **Properties** tab, you can change the image width and height, border color and border width, add text, and set margins for your image.

6 In the **Image Manager** dialog box, click the **Insert** button.

Add image to customized theme

Navigation

Library tab > **Survey Themes** tab > **Survey Themes** content pane > click the **New** button.

You can insert an image into the HTML or CSS template of your theme to customize it.

It is also possible to insert an image into the older themes, created before the 8.1 release. Based on your permissions, you can insert images from the **User Media** or **Group Media** folder.

Add image to CSS theme

Procedure

1. Go to the **Library** tab > **Survey Themes** tab.
2. On the **Survey Themes** page, on the toolbar, click **New**.
3. On the **Create a Survey Theme** page, on the toolbar, click the **CSS** button.
4. Enter your custom CSS and place the pointer at the position where you want to insert the image.
5. On the toolbar, click the **Image Manager** button.
6. In the **Image Manager** dialog box, click the **Upload** button.
7. In the **Upload** dialog box , click the **Select** button to locate your image.
8. Select the image, and then click **Open**.
9. Click the **Upload** button.
10. Select the image, and then click **Insert**.
11. Click **Save**.

> You can preview your theme by clicking the **Preview in New Window** button on the **Create a Survey Theme** page.

Add image to HTML theme

Procedure

1. Go to the **Library** tab > **Survey Themes** tab.
2. On the **Survey Themes** page, on the toolbar, click **New**.
3. On the **Create a Survey Theme** page, on the toolbar, click the **HTML** button.
4. Place the pointer at the position where you want to insert the image.
5. On the toolbar, click the **Image Manager** button.
6. In the **Image Manager** dialog box, click the **Upload** button.
7. In the **Upload** dialog box , click the **Select** button to locate your image.
8. Select the image, and then click **Open**.
9. Click the **Upload** button.
10. Select the image, and then click **Insert**.

11 Click **Save**.

> You can preview your theme by clicking the **Preview in New Window** button on the **Create a Survey Theme** page.

Enable blocked content

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Properties** tab > **Block potentially unsafe content from responses** check box.

The **Block potentially unsafe content from responses** option prevents respondents from accessing user data through the malicious attacks.

If the system detects the malicious content in survey responses, it removes the potentially dangerous content and stores only the safe one.

You can allow the respondent to type the executable code or query string parameters if the survey questions require responses that contain such type of information.

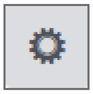
Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing survey.
3. On the **Design** tab, click the **Properties** tab.
4. In the **General** section, clear the **Block potentially unsafe content from responses** check box.

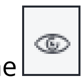
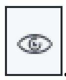
   Your changes are saved automatically.

Page Conditional Visibility

Navigation

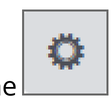
Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** tab >  menu > click **Add Conditional Visibility**.

You can define whether certain survey pages are shown or hidden. The hidden pages are not displayed to the respondents, and the next logical page appears to them instead. Multiple pages can be skipped in a sequence. Certain survey pages can also be shown or hidden based on specific conditions. For example, if you define the survey page as Conditionally Hidden and the respondent's answer matches the specified criteria, the page is not displayed to the respondent.

If conditional visibility is set on a page, the  icon and the conditions are shown at the top of the survey designer page. If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

After validating records, all fields on a hidden page are set to **Not Asked** in **Response Manager**. If there are no more valid pages in a block to be displayed, the block is exited, and the next logical page outside of the block appears to the respondent. For example, if the block is set to display three out of five pages and two have been displayed but none of the next three are defined to be visible, the block conditions are considered met and the next page outside of the block appears.

In the conditional visibility criteria designer, there is a **Device Type** criterion with the **Desktop** and **Mobile** values. You can use this criterion to show conditionally or hide pages based on the detected device type. The **Device Type** criteria can be combined with other criteria for conditional visibility.

You can access the page visibility options by clicking the **Add Conditional Visibility** on the  menu.

The visibility status appears to the right of the page name in the survey designer.

There are the following statuses:

- Shown
- Hidden
- Conditionally Shown
- Conditionally Hidden

Define Page Visibility

Procedure

1 On the **Design** tab of the survey designer, click the **Pages** tab.

2 On the **Pages** page, on the menu to the rightmost of the page bar, click **Add Conditional Visibility**.
The **Add Conditional Visibility** option is unavailable for the first page in the survey.

> You can access the same functionality from the page menu on the **Content** tab of the survey designer.

3 In the **Page Visibility** dialog box, in the **When the following criteria are met** list, select whether to show or to hide the page based on the visibility criteria.
Hide This Page is a default option.

> To hide the survey page without setting any criteria, click the **Hide this page** in the page menu.

4 To add visibility criteria, click **Add Another Criteria**.

5 Click the link next to **Source**, and then select one of the following sources:

- **Current Survey** (default) – Select to apply conditional visibility based on the survey questions or device type.

a. In the first list, click one of the following options to apply the logic to:
   - Survey question
   - Response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix with Choose One** or **Choose Many sides**, or **Scrolling Matrix** questions
   - Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click one of the following:
   - Question choice
   - Number of responses provided by the respondent

d. Detected type of device

> The values list includes the actual response options for the question. The choices are numbered in the same way as in the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, type in the expected response or leave the text box empty.

- **Participant Information** – Select to apply conditional visibility to the campaign:

a. In the first list, **Campaign Name** is selected.

b. In the second list, click the expression.

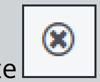
c. In the third list, click the needed campaign.

> The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply conditional visibility to the location parameter:

a. In the first list, click the needed parameter.

b. In the second list, click the expression, and then type the needed value in the adjacent box.

> If conditional visibility is set on a page, the corresponding icon and the visibility conditions are shown in the visibility status bar under the page name on the top of the survey designer page. To remove page visibility properties, click the delete  icon to the rightmost of the visibility status bar.

6 To save a single criterion, click **Save**.

7 To add more criteria, click **Add Another Criteria**, and then add several criteria.

8 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion (see Create advanced criteria, page 523).

9 To apply the selected visibility criterion to the other pages, click **Save and Apply to Others**.

10 Apply the visibility logic to the other pages by selecting the corresponding check boxes.

> If the pages already have criteria, the criteria are overwritten.

11 Click **Save**.

Same Page Conditional Visibility

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** tab > select the question that you want to show or to hide > **Question Options** panel > click the **Conditional** option > click the **Criteria** link > **Question Visibility** dialog box > **Same Page Conditional Visibility** check box.

You can set conditional visibility on the same page for the survey questions, text blocks, and section headings. When you select this option, only the questions on the same page before the current question are available for setting the criteria.

The following questions types are applicable:

- Choose One
- Choose One with Image
- Choose Many
- Choose Many with Image

When you select the **Same Page Conditional Visibility** check box and you have any existing criteria defined, the existing criteria are deleted.

To enable the conditional visibility on the same page, activate the JavaScript Required functionality. If you make JavaScript unavailable for the survey with the Same Page Conditional Visibility logic applied, the existing Same Page Conditional Visibility logic is cleared. For more information on activating the JavaScript Required option, see Properties, page 482.

If you set conditional visibility for questions on the first survey page, the Same Page Conditional Visibility check box must be selected. The only conditional visibility you can set for questions on the first page is on the same page.

When copying and pasting survey elements with the applied Conditional Visibility settings, remember that the visibility settings can be stripped and set to Shown if they are not valid anymore (for details, see Copying Conditional Visibility, page 518.

Add conditional visibility for block

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey with at least two blocks or open an existing one > **Pages** page > menu > click the **Add Conditional Visibility** option.

You can set the visibility of survey blocks to define whether certain blocks are visible or hidden based on a set of predefined criteria. The hidden blocks are not displayed to the respondents, and the next logical block appears to them instead.

If conditional visibility is set on a block, the icon and the conditions are shown at the top of the block. If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

> This feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, contact your Account Manager or Sales. For details, see Contact us, page 50.

Procedure

1 On the **Design** tab of the survey designer, click the **Pages** tab.

2 On the **Pages** page, on the menu to the rightmost of the block bar, click **Add Conditional Visibility**.
The **Add Conditional Visibility** option is disabled for the first block in the survey.

> You can access the same functionality from the menu on the **Content** side tab of the survey designer.

3 In the **Block Visibility** dialog box, in the **When the following criteria are met** list, click whether to show or to hide the block based on the visibility criteria.
The default option is **Hide this block**.

> To hide the survey block without setting any criteria, click the **Hide this block** on the page menu.

4 To add visibility criteria, click **Add Another Criteria**.

5 Click the link next to **Source**, and then select one of the following sources:

- **Current Survey** (default) – Select to apply conditional visibility based on the survey questions or device type.

a. In the first list, click one of the following options to apply the logic to:

  - Survey question

- Response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions
- Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

b. In the second list, click the expression.

c. In the third list, click one of the following:

- Question choice
- Number of responses provided by the respondent
- Detected type of device

> The values list includes the actual response options for the question. The choices are numbered in the same way as in the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, type in the expected response or leave the text box empty.

- **Participant Information** – Select to apply conditional visibility to the campaign:

a. In the first list, **Campaign Name** is selected.

b. In the second list, click the expression.

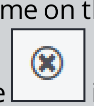
c. In the third list, click the needed campaign.

> The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply conditional visibility to the location parameter:

a. In the first list, click the needed parameter.

b. In the second list, click the expression, and then type the needed value in the adjacent box.

> If conditional visibility is set on a block, the corresponding icon and the visibility conditions are shown in the visibility status bar under the block name on the top of the survey designer page.
>
> To remove block visibility properties, click the delete  icon to the rightmost of the visibility status bar.

6 To save a single criterion, click **Save**.

7 To add more criteria, click **Add Another Criteria**, and then add several criteria.

8 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion (see Create advanced criteria, page 523).

9 Click **Save**.

When copying and pasting survey elements with the applied Conditional Visibility settings, remember that the visibility settings can be stripped and set to Shown if they are not valid anymore (for details, see Copying Conditional Visibility, page 518).

Question Conditional Visibility

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** tab > select the question that you want to show or to hide > **Question Options** panel > **Visibility** option.

You can set the conditional visibility for a question so if a respondent's answer matches the specified criteria, the question is shown or hidden. For example, if you define the question as Conditionally Hidden and the respondent's answer matches the specified criteria, the question is not displayed to the respondent.

If conditional visibility is set on a question, the icon and the conditions are displayed next to the question heading. If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon.

The following visibility options are available:

- **Shown** – The survey question is shown.
- **Hidden** – The survey question is hidden.
- **Conditional** – The question is shown or hidden according to the certain conditions.

Under conditional visibility criteria designer, there is a **Device Type** criterion with the **Desktop** and **Mobile** values. You can use this criterion to show conditionally or hide questions based on the detected device type. The **Device Type** criteria can be combined with other criteria for conditional visibility.

In the **Modern** survey rendering mode, under conditional visibility criteria designer, there is a response count criterion with the values from 0 to the specific number of choices or columns in the **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions.

The **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

You can use this criterion to hide conditionally or show questions based on the count of responses provided by the respondent. For example, if you want to hide the selected question and in the conditional visibility criteria designer you specify that the count of responses equals 2, the question is not displayed to the respondent, if the respondent's answers match the specified criterion.

If the question is **Conditionally Hidden**, no validation is performed on it. Thus if you activate such validation and logic options as **Destination**, **Preselected**, and **Answer Required** for the **Conditionally Hidden** question, they will be skipped in the published survey.

After validating records, the **Conditionally Hidden** questions are set to **Not Asked** on the **Response Manager** page. If a page is visible, and a question on that page is hidden, but has preselected values, the preselected values are shown in the **Response Manager** grid. Validating records does not set it to **Not Asked**.

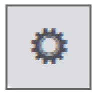
If all items on the survey page are hidden or empty, the page is not displayed to the respondents, and the next logical page appears instead.

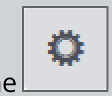
All conditionally hidden questions that were not shown to respondents do not appear on the **Display Live Results** and **Display Respondent Answers** survey end pages. Additionally, when respondents print or send their responses via email, the conditionally hidden questions are not shown in the printed files and email messages.

> When copying and pasting survey elements with the applied Conditional Visibility settings, remember that the visibility settings can be stripped and set to Shown if they are not valid anymore (see Copying Conditional Visibility, page 518).

Procedure

1 On the **Design** tab of the survey designer, click the **Pages** tab.

2 On the **Pages** page, on the  menu, click **Add Conditional Visibility**.
The **Add Conditional Visibility** option is unavailable for the first question in the survey.

> You can access the same functionality from the  menu on the **Content** tab of the survey designer.

3 In the **Question Visibility** dialog box, in the **When the following criteria are met** list, click whether to show or to hide the question based on the visibility criteria.
The default option is **Hide this question**.

4 To add visibility criteria, click the **Add Another Criteria** link.

5 Click the link next to **Source**, and then select one of the following sources:

- **Current Survey** (default) – Select to apply conditional visibility based on the survey questions or device type.
  - In the first list, click one of the following options to apply the logic to:
    - Survey question
    - Response count criterion with the values from 0 to the specific number of choices or columns in the **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions
    - Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

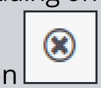
  - In the second list, click the expression.
  - In the third list, click one of the following:
    - Question choice
    - Number of responses provided by the respondent
    - Detected type of device

The values list includes the actual response options for the question. The choices are numbered in the same way as in the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, type in the expected response or leave the text box empty.

- **Participant Information** – Select to apply conditional visibility to the campaign:
  - In the first list, **Campaign Name** is selected.
  - In the second list, click the expression.
  - In the third list, click the needed campaign.

The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply conditional visibility to the location parameter:
  - In the first list, click the needed parameter.
  - In the second list, click the expression, and then type the needed value in the adjacent box.

If conditional visibility is set on a question, the corresponding icon and the visibility conditions are shown in the visibility status bar above the question heading on the survey designer page. To remove question visibility properties, click the delete icon  to the rightmost of the visibility status bar.

6. To save a single criterion, click **Save**.
7. To add more criteria, click **Add Another Criteria**, and then add several criteria.
8. Specify which criteria need to be met by selecting the corresponding **Match** options:
   - **All criteria** – All the criteria must be met.
   - **At Least One Criterion** – At least one of the criteria must be met.
   - **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion (see Create advanced criteria, page 523).
9. To apply the selected visibility criterion to the other questions, click **Save and Apply to Others**.
10. Apply the visibility logic to the other questions by selecting the corresponding check boxes.

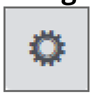
If the questions already have criteria, the criteria are overwritten.

11. Click **Save**.

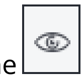
All existing conditional criteria created before the 6.5 release are conditionally hidden. All conditionally hidden questions that were not shown to respondents do not appear on the **Display Live Results** and **Display RespondentAnswers** survey end pages. Additionally, when respondents print or send their responses via email, the conditionally hidden questions are not shown in the printed files and email messages.

Add conditional visibility choices rows columns

Navigation

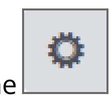
Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one >  menu > click the **Add Conditional Visibility** option..

You can set conditional visibility for question choices, rows and columns (for **Matrix** question), and topics (for **Scrolling Matrix** and **Scale Slider** questions) to define whether they are shown or hidden in a survey based on a set of predefined criteria.

If conditional visibility is set on a question choice, row, column, or topic, the  icon and conditions are displayed next to the question heading. If conditional visibility is not valid anymore, the warning icon appears next to the conditional visibility icon .

> The following procedure describes how to set conditional visibility for a choice. To set conditional visibility for a row, column, or topic, follow the same procedure.

Procedure

1. On the **Content** tab of the survey designer, on the  menu, click **Add Conditional Visibility**.
2. In the **Choice Visibility** dialog box, in the **When the following criteria are met** list, click whether to show or to hide the choice based on the visibility criteria.
3. To add visibility criteria, click **Add Another Criteria**.
4. Click the link next to **Source**, and then select one of the following sources:
   - **Current Survey** (default) – Select to apply conditional visibility based on the survey questions or device type.
   a. In the first list, click one of the following options to apply the logic to:
      - Survey question
      - Response count criterion with the values from 0 to the specific number of choices or columns in **Choose Many**, **Matrix** with **Choose One** or **Choose Many** sides, or **Scrolling Matrix** questions
      - Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

   b. In the second list, click the expression.
   c. In the third list, click one of the following:
      - Question choice
      - Number of responses provided by the respondent

- Detected type of device

> The values list includes the actual response options for the question. The choices are numbered in the same way as in the survey designer. For the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** with **Short Answer** or **Essay** sides questions, type in the expected response or leave the text box empty.

- **Participant Information** – Select to apply conditional visibility to the campaign:

a. In the first list, **Campaign Name** is selected.

b. In the second list, click the expression.

c. In the third list, click the needed campaign.

> The **Campaign Name** source is available only after you add at least one campaign on the **Collect** tab.

- **Respondent Location** – Select to apply conditional visibility to the location parameter:

a. In the first list, click the needed parameter.

b. In the second list, click the expression, and then type the needed value in the adjacent box.

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as an identifier for the choice.

5 To save a single criterion, click **Save**.

6 To add more criteria, click **Add Another Criteria**, and then add several criteria.

7 Specify which criteria need to be met by selecting the corresponding **Match** options:

- **All criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – Create the needed logical expressions using the drop-down lists with parentheses and the **And**/**Or** operators next to each criterion (see Create advanced criteria, page 523).

8 To apply the selected visibility options to the other choices, click **Save and Apply to Others**.

9 In the **Apply to Others** dialog box, apply the visibility logic to other choices by selecting the corresponding check boxes. The check box of the currently selected choice is unavailable.

> If the choices already have criteria, the criteria are overwritten.

10 Click **Save**.

> All existing conditional criteria created before the 6.5 release are conditionally hidden. All conditionally hidden choices that were not shown to respondents do not appear on the **Display Live Results** and **Display RespondentAnswers** survey end pages. Additionally, when respondents print or send their responses via email, the conditionally hidden choices are not shown in the printed files and email messages.

When copying and pasting survey elements with the applied **Conditional Visibility** settings, remember that the visibility settings can be stripped and set to **Shown** if they are not valid anymore (for details, see Copying Conditional Visibility, page 518).

Page and Question Visibility Rules

In the EFM application, the following page and question visibility rules are defined:

Text **Elements** are not considered **Questions** for visibility rules.

1 Any Object (Page, Question, Choice, Row/Topic) on Page 1 of a survey, can only be set to Shown or Hidden, as criteria can only be based on fields on prior pages. Objects are set to Shown and criteria cleared if moved to Page 1.

2 Any Object (Page, Question, Choice, Row/Topic) which is set to Conditional (Show this Object or Hide this Object) with no criteria, or criteria which is no longer valid, is considered Visible for the purpose of survey taking and validating records.

3 A Page is considered Visible for survey taking and validating records if:

- Explicitly set to Shown and:

  No Questions (To support text elements)

  OR

  All Questions explicitly Hidden

  OR

  At least one Visible Question (explicitly Shown or based on conditions)

- Explicitly set to Conditional (Show this Page) and:

  Criteria met

  AND

  No Questions (To support text elements) OR At least one Visible Question (explicitly Shown or based on conditions)

If all Questions are explicitly Hidden, Page is not shown. A Page with all explicitly Hidden Questions must be set to Shown to pass in data.

- Explicitly set to Conditional (Hide this Page) and:

  Criteria not met

  AND

  No Questions (To support text elements) OR At least one Visible Question (explicitly Shown or based on conditions)

If all Questions are explicitly Hidden, Page is not shown.

Next Page is displayed if there are no text elements on the Page, and data is collected in hidden fields.

4 A Question is considered Visible for survey taking and validating records if:

- Explicitly set to Shown
- Explicitly set to Conditional (Show this Question) and criteria met
- Explicitly set to Conditional (Hide this Question) and criteria not met

5 Validation

- If a Question is explicitly set to Hidden or Hidden (based on conditions), no validation is performed on it.

- If a Question is explicitly set to Shown or Visible (based on conditions), validation is performed on it.

6 Special rules for Questions which are Hidden (based on conditions) and do not contain preselected values on Pages considered Visible by Rule 3:

- Fields are set to Not Asked (NULL) during survey taking and validating records.
- Question and Choice Destinations are not evaluated.
- Fields are treated as Not Asked (NULL) for all other Logic (Advanced Branching, Triggers, Quotas, Visibility, etc.).

7 Special rules for Questions which are explicitly set to Hidden or Hidden (based on conditions) and contain preselected values on Pages considered Visible by Rule 3:

- Fields are allowed to collect data in Survey Engine
- Fields are allowed to contain data in Validate Records

8 Jump Page

- A Page which is explicitly set to Hidden or Hidden (based on conditions) does not appear in Jump Page.
- A Question which is explicitly set to Hidden or Hidden (based on conditions) does not appear in Jump Page.

9 Results Pages

- A Page which is explicitly set to Hidden or Hidden (based on conditions) does not appear in Results Pages.
- A Question which is explicitly set to Hidden or Hidden (based on conditions) does not appear in Results Pages.

> When copying and pasting survey elements with the applied Conditional Visibility settings, remember that the visibility settings can be stripped and set to Shown if they are not valid anymore (for details, see Copying Conditional Visibility, page 518).

Exporting Conditional Visibility

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** tab > add conditional visibility to pages, questions, and choices > **Actions** menu > select the **Export** option > **Conditional Visibility** notifications in the exported file.

You can define whether certain survey pages, questions, and choices are shown, hidden, or conditionally visible. When you export the survey with conditional visibility to the Microsoft Word or Adobe PDF format, the corresponding notification appears in the export file. The notification also includes a description of the visibility criteria that must be met.

The pages and questions with the **Hidden** visibility status are not exported.

Notification about the page conditional visibility appears at the beginning of a survey page.

Notification about the question conditional visibility appears above the question.

Notification about the choice or row conditional visibility appears above the question.

To test, create a survey with conditional visibility. Then, export your survey to Microsoft Word or Adobe PDF and see the visual references included in your export file as in the example above.

If you use an Microsoft Word file, import to create your survey, the conditional visibility logic is imported as a comment in the questionnaire. In order for this functionality to work properly, you need to program this functionality manually (conditional visibility) once you complete the import.

Procedure

1. Go to the **My Surveys** grid, and then create a new survey or open an existing one.
2. Define the visibility criteria for the survey pages, questions, and choices.
3. On the **Actions** menu, click **Export**, and then select the **Microsoft Word** or **PDF** option.
4. When exporting to the Microsoft Word format, select the **Content Review** survey type to export all the survey conditional visibility, and then click the **Export** button.
5. The export file is generated in the selected format.
6. To save or open the file, click the link with the file name.
7. Click **Close**.
   In the exported survey, you can see the notifications about the conditionally visible pages, questions, and choices.

Copying Conditional Visibility

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > add the **Choose Many** or **Choose Many with Image** question on the first page of your survey > add another page with any question > access the page, question, or choice visibility criteria builder.

When copying and pasting survey elements with the applied Conditional Visibility settings, take into account the following rules to avoid unexpected results in the flow of your survey:

- If visibility for the copied and pasted block (or parent block), page, question, or choice (column, topic, or row) is set to Conditionally Hidden or Conditionally Shown, it is stripped and set to Shown if visibility criteria become invalid due to the new position of the element. For example, the pasted page appears before the question that is referenced in the visibility criteria.
- When a block or page is copied and pasted:
  - The Conditional Visibility settings for all its child elements are stripped and set to Shown if the visibility criteria reference questions within the copied block or page.
  - The Conditional Visibility settings for its child elements remain unchanged if the visibility criteria reference questions that are before the copied block or page and are still valid for the current position of the pasted block or page.

Least filled quota visibility condition

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > add the **Choose Many** or **Choose Many with Image** question on the first page of your survey > add another page with any question > access the page, question, or choice visibility criteria builder.

You can use the Least Filled Quota functionality to specify what question, page, or choice is shown to users based on their previous answers.

This functionality allows you to follow a specified number of options chosen by the least amount of respondents by setting up the subsequent pages accordingly.

For example, you want to investigate 9 most popular pets in the country. You create a **Choose Many** question that contains typical animals as choices. You know that cats and dogs are the most widespread pets; however, you need information about other animals that are less popular. Also, you want an equal distribution of responses across all animals. For this, on the subsequent pages of the survey, you can ask about animals chosen by a minimum of respondents. For this purpose, use the **Least Filled Quota** functionality.

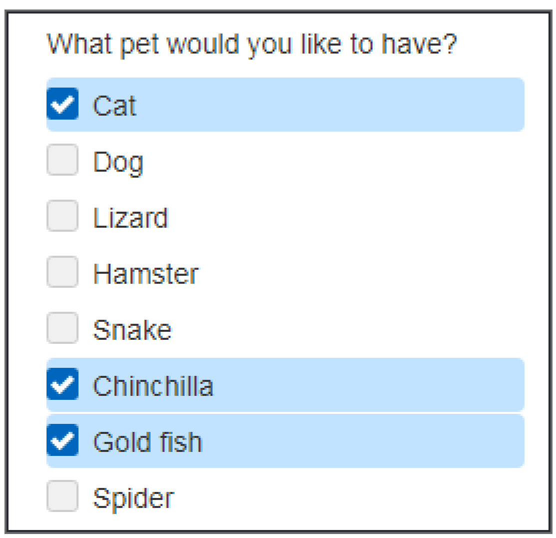
To set up the Least Filled Quota functionality, use the **Is in Bottom** option in the corresponding visibility dialog box. For details, see Add the least filled quota visibility condition, page 522.

The **Is in Bottom** option is available only for the **Modern** survey rendering mode.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

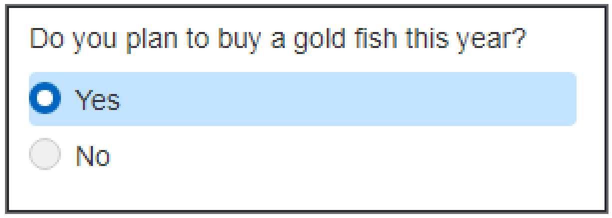
Example:

You are asking the respondents what pets they prefer.



Choose Many question

On the subsequent page, the respondent is shown questions about the pet that has the least responses. This means that if the respondent chose cat and gold fish, and if the gold fish is one of the options with the least responses, the question about gold fish will be shown. If the number of responses is equal for two bottom options, then the subsequent page is selected randomly for one of them.



Subsequent page

Assume that a new respondent answers the **Choose Many** question about pets, and the previously collected responses are as follows:

Cat	235
Dog	400
Lizard	9
Hamster	321
Snake	8
Chinchilla	367
Gold fish	7
Spider	1

With the Least Filled Quota functionality turned on for the bottom two options, based on the respondent's answers, the subsequent pages will be shown as follows:

1 option (chinchilla)	Page for chinchilla
2 options (dog and hamster)	Pages for dog and hamster
3 options (cat, dog, gold fish)	Pages for gold fish and cat, because they have fewer responses than the other two
4 options (cat, dog, lizard, hamster)	Pages for lizard and cat, because they have fewer responses than the other two

Autoselection

With the autoselection feature, you can set up a **Least Filled Choices** condition for the **Choose Many** and **Choose Many with Image** questions. A defined number of least filled choices is autoselected, so that you can conduct a least filled quota analysis.

You can use autoselection in the following cases:

- If a respondent does not select any option, but you want to collect answers for the bottom two pets.
- If the question is hidden and you want to show pages for bottom two pets.

To set up autoselection, in the **Question Options** pane, in the **Least Filled Choices** section, select the needed item in the list.

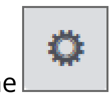
Add the least filled quota visibility condition

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > add the **Choose Many** or **Choose Many with Image** question on the first page of your survey > add another page with any question > access the page, question, or choice visibility criteria builder.

Use the Least Filled Quota functionality to specify what question, page, or choice is shown to users based on their previous answers.

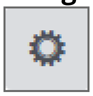
Procedure

1. On the **Content** tab of the survey designer, on the  menu, click **Add Conditional Visibility**.
2. In the visibility criteria builder, in the first list, click the needed **Choose Many** choice.
3. In the second (expression) list, click **Is In Bottom**.
4. In the third list, specify the needed value.

A number of options available in the value list is one less than the number of the **Choose Many** choices.

Create advanced criteria

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one >  menu of a needed survey element (question, page, block, etc.) > click **Add Conditional Visibility** > visibility criteria builder.

You can define the advanced conditional visibility criteria for your survey logic by combining different criteria using parentheses and **And / Or** operators.

Procedure

1. In the visibility criteria builder, add several criteria (see Question Conditional Visibility, page 509).
2. Select the **Advanced** option next to **Match**.
   The **And** / **Or** operators and parentheses lists appear next to each criterion.
3. To group multiple criteria according to your needs, select the parentheses.
4. Select the **And** / **Or** operators to combine the defined criteria groups according to the logic that you need for the conditional visibility:
   - The **And** operator denotes that two or more criteria are met at the same time.
   - The **Or** operator denotes that one of the criteria is met.

   For example, in a survey with four pages and four Choose One questions, you can define the following advanced criteria:

   ((Q1=1 OR Q1=2) AND (Q2=1 OR Q2=2)) Or (Q3=1 AND Q4=2)

   In fact, we have six criteria here (Q1=1, Q1=2, Q2=1, Q2=2, Q3=1, and Q4=2) that are combined into advanced criteria by using the corresponding logical operators.
5. To manage your criteria, use the following options to the right of each criterion.
   - **Move Up** – Move the criterion up in the list.
   - **Move Down** – Move the criterion down in the list.
   - **Delete** – Remove the criterion.

Outline and Flow Overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can view the outline of the survey questions and possible logical flows by switching to the **Outline and Flow** view during the survey designing or editing process. This can help to identify problem areas in your survey. You can access the **Outline and Flow** view from the survey designer by using the **Outline and Flow** button on the toolbar.

The **Outline and Flow** view displays the survey structure, including questions, pages, blocks, and logical flows like branching, visibility, destination, etc.

Under the toolbar, you can see a number of options, which you can use to customize the **Outline and Flow** view. The following options are available:

- **View** – Define the survey items that are displayed in the **Outline and Flow** view by selecting the corresponding check boxes to the right of the "View" option. The following options are available:
  - **Blocks** – Show all page blocks.
  - **Pages** – Show all pages.
  - **Branches** – Show all branches and destinations.
  - **Logic** – Show all decision points and conditional visibility indicators.

  By default, all check boxes are selected even if the survey does not contain the corresponding items. For example, the "Branches" check box is selected even if there are no branches in the survey.

  The element is hidden when you clear the corresponding check box. For example, when the "Blocks" check box is clear, all block entries become hidden. Selecting the check box will show them again.

  Hiding elements does not change the behavior of the page. For example, if a branch skips two pages, those pages are skipped even when the branch is hidden.

  The "View" settings are not saved across the sessions.
- **Device Type** – From the **Device Type** drop-down menu, you can select the **Desktop** or **Mobile** device type. According to the selected type, you can view the corresponding branching and conditional visibility of a survey. By default, the **Device Type** value is set to **Desktop**.
- **Expand All** – Show all decision points.
- **Collapse All** – Hide all decision points.
- **Clear All** – Clear and revert all decision points back to their original state.

Survey pages and questions in Outline and Flow view

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can see all survey pages and questions in a single view by switching to the **Outline and Flow** view in the survey designer.

Each page and question has its own line in this survey outline. The page line is displayed as the word **Page** with the page number, for example, **Page 1**, and the page name to the right. Pages that do not have a name are called **Untitled**.

The question line is displayed as the question heading and text without any images or media. The question heading is highlighted in bold. When the question text contains many characters, it is abbreviated in the middle so that it does not exceed a single line. The icon showing the question type appears to the right of the question.

When the **Answer Required** option is activated for the question, an asterisk (*) appears to the left of the question in the **Outline and Flow** view.

For the **Matrix** questions, each topic and side combination appears on its own line.

When you hover over the question text, the fly-out with the full question appears. Images are not displayed in the **Outline and Flow** view, the image file name appears instead.

End Pages and Custom End Pages in Outline and Flow view

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can see what type of end page is displayed to a respondent by switching to the **Outline and Flow** view in the survey designer.

The end page has its own line in the survey outline and appears below the last survey page. The end page is displayed as the word **Page** with the next incremental number and the end page type to the right. The type of the end page depends on the survey logic.

- If the respondent is branched to the end page, the end page is called **End (Branched Out)**.
- If the respondent is branched to the custom end page, the name of this custom end page is displayed.
- If the respondent is not branched to the end page, the end page is called **End (Survey Completed)**.

The Survey Saved, Prevent Updates, Survey Closed, and Quota Reached end page types are not displayed in the **Outline and Flow** view.

Page Blocks and other content in Outline and Flow view

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can see all page blocks and other survey content in a single view by switching to the **Outline and Flow** view in the survey designer.

Each block has its own line indicating the beginning and the end of each block. These lines appear as the word **Block** with the block number, and the word **Begin** or **End** to the right, for example, **Block 1** (**Begin**).

When the **Random Order** or **Rotated Order** option is activated for the page block, the corresponding notification appears at the beginning of the block in the **Outline and Flow** view.

The other survey items, such as section heading, code block, text block, and comment also appear at their own line in the **Outline and Flow** view. The icon showing the content type appears to the right of the survey item.

Branches and Destinations in Outline and Flow view

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can see the destination and branching applied to the survey and test the survey logic by switching to the **Outline and Flow** view in the survey designer. Each branch and destination has its own line in the survey outline.

The branch line starts with the words **Branch to:** followed by the destination page and branching criteria indicating the question that the branching is applied to. If you hover over the question, a tooltip containing the full question text appears.

The destination line starts with the word **Destination** followed by the destination page and the destination criteria to the right. If you hover over the question, a tooltip containing the full question text appears.

If the page contains more than one branch or destination, they appear according to their evaluation order.

The **Decision Point** icon appears to the left of the question where the branching or destination occurs. When you click the **Decision Point** icon, the **Choices** section expands displaying question choices. When the choice text contains many characters, it is abbreviated. You can hover over the choice to see the full choice text in a tooltip. For the Choose One with Image and Choose Many with Image questions, the image appears in a tooltip.

The Choices section is collapsed by default.

The **Decision Point** icon appearance depends on whether the **Choices** section is collapsed or expanded.

Clicking the icon again will collapse the **Choices** section back to its original state.

You can interact with the survey by clicking a choice to see where the respondent is taken in the survey. Both the question choice and the destination applied to it appear in green color. The survey content becomes hidden based on what a respondent will see when taking the survey.

For the Choose One or Choose Many question, each choice appears as a button.

For the Fill in the Blank or Essay question, a text box appears next to each choice. Enter the text in the text box and click the **Apply** link to the right of it to test the survey flow. For the Fill in the Blank questions with the Dates input type, the date picker appears when you click the date field.

To clear your selections, click the **Clear Responses** link to the right of the question. When you clear the choice selection, the survey flow is re-evaluated.

When a question has no choice selected, it is treated as not asked in reference to the survey flow.

If you select a choice with no destination applied, the survey flow is not affected.

Conditional Visibility in Outline and Flow view

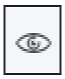
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** view > **Outline and Flow** button.

You can see which pages and questions are conditionally hidden or shown by switching to the **Outline and Flow** view in the survey designer. The **Conditional Visibility** icon appears to the left of the question or page where the visibility logic is applied.

If you hover over the icon, a tooltip containing the full visibility criteria appears.

You can interact with the survey by clicking a choice to see when the survey page or question is shown or hidden based on a set of pre-defined criteria. The **Conditional Visibility** icon changes its color depending on the visibility status of the page or question in the following way:

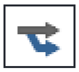
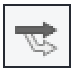
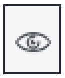
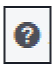
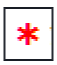
 – The icon appears for the Hidden status.

When the survey page is conditionally hidden, the page line is inactive, and its content is hidden.

When the survey question is conditionally hidden, the question line appears as inactive, its content is hidden, and the question text is struck through. Such question is treated as not asked in reference to the survey flow.

List of indicators in Outline and Flow view

The list of indicators used in the **Outline and Flow** view:

	The Decision Point icon for the collapsed Choices section.
	The Decision Point icon for the expanded Choices section.
	The Conditional Visibility icon for the survey pages and questions with the Hidden status.
	The criteria icon for the questions containing destination or branch.
	The Answer Required icon for questions.
Rotated Order	The Rotated Order notification for the page blocks.
Random Order: All	The Random Order: All notification for the page blocks.
Random Order: 1 Page(s)	The Random Order: # Page(s) notification for the page blocks.

Piping values in the Question and Response Text

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

You can insert a respondent's answer from a question into a later question in your survey. You can pipe values both in the question text and response text (the choice, topic, row, column, and category text). Also, you can pipe values in the choices that will be preselected for particular topics in the **Fill in the Blank** question.

For the **Matrix** and **Scale Slider** questions, you can use the piping functionality when defining the number of topics or sliders that should be visible to the respondents. In this case, the piping will work if the following two conditions are met:

1. There is a **Fill in the Blank** question on the previous pages of your survey.
2. The input type for the field from which you want to pipe a value is set to **Whole Number**.

The **Piping** functionality requires that the source and target questions are separated by a page break.

Pipe Report Values

You can pipe report values to easily pass the underlying values for categorical variables and use it for conditional visibility, branching, and reporting.

When piping a value, below each question you can see the report value for that question in the following format: Report Value for <question>.

Pipe Export Values

In **Modern** survey rendering mode, you can pipe export values defined for the question choices.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

The selected choice with the defined export value is piped into the question text or response text of the next page, if it is selected by the respondent. If the selected choice does not have an export value defined, it is piped into the question text or response text of the next page, but the choice value is returned. If the choice is not selected, but is piped, the blank value is returned.

For more information, see Piping export values, page 534.

Pipe Response Counts

In **Modern** survey rendering mode, you can pipe the count of responses selected in **Choose Many**, **Matrix with Choose One** or **Choose Many** sides, and **Scrolling Matrix** questions into the question text or response text of the next page. When a respondent takes your survey, the count placeholder is replaced with the number of answers provided by the respondent.

> The count placeholder for the **Choose Many question** is [[Question Title]][Q ID]CNT; the count placeholder for the **Matrix with Choose One** or **Choose Many** sides, and **Scrolling Matrix** questions is [[Question Title]][Q ID]_[Side]_[RepsponseID]CNT.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Pipe Respondent Fields and Respondent Location values

You can pipe **Respondent Fields** and **Respondent Location** values into question, choice, and topic text by using the **Other** side tab in the **Insert Piped Value** dialog box. For details about **Respondent Fields** and **Respondent Location** data, see Properties, page 482.

Pipe values for multi-campaign surveys

When you add multiple campaigns to your survey, piped values for the **Invite Panelists** campaign are hidden from the respondents that belong to other campaign types. Therefore, the question is shown, but the question placeholder is blank.

Pipe values from the file import

You can pipe values from file import into question, choice, and topic text and as preselected responses into **Short Answer**, **Fill in the Blank**, and **Essay** questions. For details, see Pipe values from a file import, page 548.

> Piping from file import is available only for the surveys that have participants added from this file import via the **Add Participants to a Survey** trigger (see Create a file import trigger, page 1175).

How to Pipe Values

> In the following example, **Fill in the Blank** questions are used.

Procedure

1. On the **Content** side tab of the **Design** tab, add a **Fill in the Blank** question, and then insert a page break.
2. On the second page of your survey, add another **Fill in the Blank** question.
3. On the editing toolbar, click the icon.
4. On the **Insert Piped Value** dialog box, click the **Questions** tab, and then select the question from which you want to pipe data.

5 Click **OK**.

The placeholder for the selected value is inserted in the question text. For more information, see Piping export values, page 534.

> In the **Insert Piped Value** dialog box, you can also pipe the following values by clicking the **Other** tab: Survey URL, Culture, Key 1, Key 2, Key 3, Group ID, Project ID, Record ID, Panelist ID, Session ID, and also the following respondent location values: City, State/Province, Country, and Zip Code/Postal Code.

Piping export values

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

You can pipe the defined export values both in the question text and response text (the choice, topic, row, column, and category text). Also, you can pipe values in the choices that will be preselected for particular topics in the **Fill in the Blank** question.

You can pipe export values only in **Modern** survey rendering mode.
Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

In the **Insert Piped Value** dialog box, placeholders appear for all choices of **Choose One**, **Choose Many**, and **Matrix** (with **Choose One** and **Choose Many** sides) questions that have an export value defined, similar as for report values.

Piping export values in the **Scrolling Matrix**, **Scale Slider**, and **RankOrder** questions works in the same was as for the **Matrix** with the **Choose One** side questions.

You cannot define export values for the **Fill in the Blank**, **Short Answer**, **Essay**, **Matrix** (with **Short Answer** and **Essay** sides), and **Drag & Drop Rank Order** questions.

The Piping functionality requires that the source and target questions are separated by a page break.

The export value which is defined in the selected choice is piped into the question text or response text of the next page. If the selected choice does not have an export value defined, it is piped into the question text or response text of the next page, and the choice value is returned. If the choice is not selected, but is piped, the blank is returned.

Insert piped values into code blocks

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

You can insert the piped values into code blocks to enhance your own JavaScript code in the survey.

The Piping functionality requires that source questions and code blocks are separated by a page break.

Procedure

In this example, the **Choose One** question is used.

1. In the **Design** view, add the **Choose One** question.
2. On the next page, in the **Add Other Content** area, click the **Code Block**.
3. Click the **Click to edit code block** text and enter the code.
4. On the editing toolbar, click the icon.
5. In the **Insert Piped Value** dialog box, select the value that you want to insert into the code block, and then click **OK**.

   The piped value is inserted into the code block.

Export values – placeholder formats

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

There are different placeholder formats for export values for certain types of questions.

Placeholder format	Question types
%[1]Q1EVAL%	**Choose One** questions.
%[1]Q1EVAL_1% %[1]Q1EVAL_2%	**Choose Many** questions.
%[1]Q1_A_1EVAL% %[1]Q1_B_2EVAL% %[1]Q1_C_3EVAL%	**Matrix** questions with the **Choose One** side. If there is more than one side added, the corresponding letters are specified in the placeholder (A, B, C, and so on).
%[1]Q1_AEVAL_1% %[1]Q1_BEVAL_2% %[1]Q1_CEVAL_3%	**Matrix** questions with the **Choose Many** sides. If there is more than one side added, the corresponding letters are specified in the placeholder (A, B, C, and so on).

Adding Choice List

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon > **Pipe in Topics** option.

You can insert responses from any **Choose Many**, **Choose Many with Image**, **Matrix**, or **Scrolling Matrix** question into the topics, rows, or columns of a later question in your survey. The corresponding images are also piped in the target questions provided that they support images.

The **Piping** functionality requires that the source and target questions are separated by a page break.

You can pipe responses into the questions of the following types:

- **Matrix** (does not support responses with images)
- **Drag & Drop Rank Order**
- **Rank Order** (does not support responses with images)
- **Scrolling Matrix**

If you pipe the respondent's answers, you cannot add any additional responses.

See an example below where a respondent answers a question, and then the selected responses are piped into the next question.

Piping Choices and Topics

Procedure

In this example, the **Matrix** and **Rank Order** questions are used.

1 On the **Content** tab of the **Design** tab, add a **Matrix** question.
2 Insert a page break.
3 Add a **Rank Order** question.

To prevent validation that the piping cannot meet, indicate that the respondent must rank all topics in your **Rank Order** or **Drag & Drop Rank Order** question.

4 Click the icon next to any topic in your **Rank Order** question.
5 On the menu, click **Pipe in Topics**.
6 In the **Piped Choices** dialog box, select the column of your **Matrix** question that you want to use for piping.
7 Indicate whether to pipe **Selected** or **Not Selected** responses.
8 Click **OK**.

Click the **Clear Piping** link below the topics to remove the piped responses. For the columns of the **Matrix** questions, the **Clear Piping** option is available on the drop-down menu at the column level.

Piping in topics

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > click a question > click icon > **Pipe in Topics** option.

You can insert responses from any **Choose Many**, **Choose Many with Image**, **Matrix**, or **Scrolling Matrix** question into the topics, rows, or columns of a later question in your survey. The corresponding images are also piped in the target questions provided that they support images.

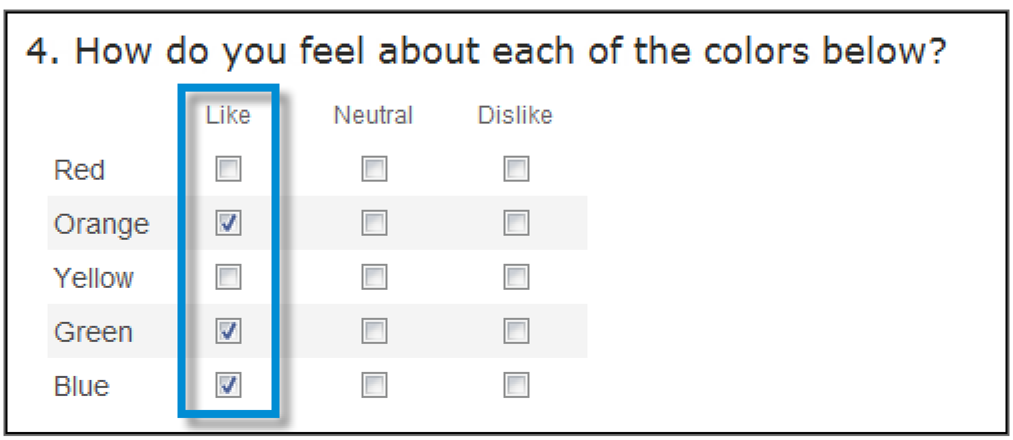
The Piping functionality requires that the source and target questions are separated by a page break.

You can pipe responses into the questions of the following types:

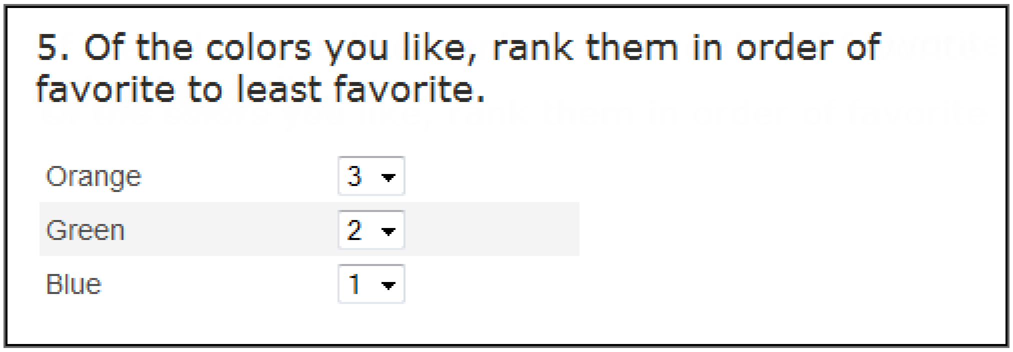
- **Matrix** (does not support responses with images)
- **Drag & Drop Rank Order**
- **Rank Order** (does not support responses with images)
- **Scrolling Matrix**

If you pipe the respondent's answers, you cannot add any additional responses.

Example: The respondent answers a question, and then the selected responses are piped into the next question.



The source question



The destination question

Piping choices and topics

Procedure

1. Go to the **Design** tab > **Content** tab, add a **Matrix** question.
2. Insert a page break.
3. Add a **Rank Order** question.

> To prevent validation that the piping cannot meet, indicate that the respondent must rank all topics in your **Rank Order** or **Drag & Drop Rank Order** question.

4. Click the icon next to any topic in the **Rank Order** question.
5. On the menu, click **Pipe in Topics**.
6. In the **Piped Choices** dialog box, select the column of the **Matrix** question that you want to use for piping.
7. Indicate whether to pipe **Selected** or **Not Selected** responses.
8. Click **OK**.
   A placeholder is inserted instead of the topics.

> Click the **Clear Piping** link below the topics to remove the piped responses. For the columns of the **Matrix** questions, the **Clear Piping** option is available on the menu at the column level.

Piping Responses

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Design from Scratch** option > name a new survey > **Design** tab > **Content** tab > click a question > click icon > **Pipe in Topics** option.

You can insert responses from multiple columns and questions into the topics, rows, or columns of your **Matrix**, **Drag & Drop Rank Order**, **Rank Order,** or **Scrolling Matrix** question. The corresponding images are also piped in the target questions provided that they support images.

The **Piping** functionality requires that the source and target questions are separated by a page break.

You can pipe multiple responses from the questions of the following types:

- **Choose Many**
- **Choose Many with Image**
- **Matrix**
- **Scrolling Matrix**

Rules for Piping

The following rules apply to piping from the multiple questions and columns:

1. For the **Choose Many** questions, you select whether to show **Selected** or **Not Selected** responses for the whole question, not for the individual topics.
2. For the **Choose Many** of a **Matrix** question, you select whether to show **Selected** or **Not Selected** responses for an individual column.
3. You cannot pipe responses from the same column or **Choose Many** question twice. After piping from a column or question, that column or question is removed from the piping list for that question to avoid confusion.
4. If there is a conflict of piping criteria and the logic is set to show and then not to show the same response, the response is shown by default.

Duplicate Topics

When you pipe topics from different sides of a matrix, these sides are treated as separate questions. So, you can accidentally repeat topics if you pipe them from a multi-sided matrix or from multiple questions with the same choice lists. Make sure the topics are not duplicated when you design your survey.

Piping from Multiple Questions and Columns

In this example, the **Matrix** and **Rank Order** questions are used.

Procedure

1 On the **Content** tab of the **Design** tab, add a **Matrix** question.

2 Insert a page break.

3 Add a **Rank Order** question.

4 Click the icon next to any topic in your **Rank Order** question.

5 On the menu, click **Pipe in Topics**.

6 In the **Piped Choices** dialog box, select the column the column from which to pipe responses.

7 Indicate whether to pipe **Selected** or **Not Selected** responses.

For example, if needed, you can choose to include the **Selected** responses from one question and **Not Selected** from another one.

8 Click **OK**. A placeholder is inserted instead of the topics.

After piping from a column or **Choose Many** question, that column or question is removed as an option for that question.

9 Click the icon next to the placeholder, and then repeat steps 5-8 to pipe multiple times.

If you want to remove a particular placeholder, click Delete on the corresponding menu. To delete all piped responses, click the **Clear Piping** link.

Piping URL Query

To have a question that allows pulling a value from the URL into the survey, a placeholder is needed in the preselected area of the topic for **Fill in the Blank** , **Short Answer**, and **Essay** questions on the first page of a survey. See the **Steps** section below to locate the **Preselected** field of a **Fill in the Blank** question.

> The survey engine can only get values from the URL on the first page of the survey.

The placeholder is composed of a flag ("URL") and the variable name that the survey engine is going to look for in order to grab the value from the URL and put it into the question in the survey.

The placeholder will look something like %URL.id% and will be put under **Preselected** on the **Topic Options** panel for **Fill in the Blank**, **Short Answer**, and **Essay** questions on the first page of the survey.

For example, %URL.first%, %URL.last%, and %URL.zip% can be used to add the first name, last name, and zip code into the survey. The used URL is the default URL of the survey with an added ampersand and then the variables and values for the information to pass into the survey. In **Modern** survey rendering mode, the survey URL is different and you need to add **?**before the first parameter.

Based on the example above, the URL looks this way:

Classic survey rendering mode

http://survey.vovici.com/se.ashx?s=091430145468A283&first=John&last=Smith&zip=90210

Modern survey rendering mode

http://survey.vovici.com/se/091430145468A283?first=John&last=Smith&zip=90210

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Procedure

1. Add a **Fill in the Blank** (**Short Answer** or **Essay**) question on the first page of your survey.
2. Click the topic within the **Fill in the Blank** question.
3. In the **Topic Options** panel, type the desired placeholder in the **Preselected** box. Repeat if needed for additional values to be piped in.
4. Design the remainder of the survey, test and/or open the survey and add the variables and values to the URL.

> Passing variables from the URL into the survey is not foolproof. Smart users can change values in the URL, some browsers will not pass the values properly to the survey engine and in some cases the code we use in the survey will not run and populate the values in the fill in the blank topics.

If there is information about a participant that is known and that needs to be part of the survey responses, it is best to use the **Create a List**, **Require a Passcode**, or **Invite Panelists** types of survey distribution and preload the data with the participants or panelists.

Hidden IDs and Piping URL Query String Parameter Value

Hidden IDs

You can pipe additional information into a survey by using the survey link.

Part A. Determine the Placeholder

The placeholder is what takes the place in the survey for the value being piped in the URL. This should be determined first.

A "%" sign is needed at the beginning and at the end of the placeholder. This tells the survey engine to pipe values into the survey. The text URL in capital letters tells the survey engine to pipe the value of the identifier from the survey URL into the survey. A period (.) separates the URL and the identifier.

%URL.identifier%

For example:

First Name to %URL.first%

Last Name to %URL.last%

Zip Code to %URL.zip%

Part B. Build the URL

An ampersand followed by the identifier tells the survey engine a value is to be piped into the survey. If you use **Modern** survey rendering mode, you need to add a question mark before the first parameter.

Example:

Classic survey rendering mode

http://www.surveys.com/Vovici/se.ashx?s=0B87A62B33A0810F&first=Bob&last=Gates&zip=94102

Modern survey rendering mode

http://www.surveys.com/Vovici/se/0B87A62B33A0810F?first=Bob&last=Gates&zip=94102

> The survey invitation designer does not support passing the identifier using this URL. These instructions should be used primarily for passing data to a survey from an existing URL or when using a third party mailer when more secure methods are not available, such as pre-loading data by .CSV/.TSV (using an External Access List), Web services or using borrowed questions or piping within the survey.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, **Classic** survey rendering will not be supported.

Part C. Setting up the Hidden ID question

1 Add a **Fill in the Blank** question as the first question in your survey.

For example:

Please provide some demographic information

First Name _________

Last Name _________

Zip Code ___________

2. Hide the question by using the **Visibility** section on the **Question Options** panel. Ensure that the **Show Question Heading** and **Show Question** check boxes are not selected.
3. Enter the desired placeholder under **Preselected**.
4. Design the remainder of the survey, save and publish the survey.

Piping Responses in the Case Properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > add a **Choose One** or **Fill in the Blank** question > **Triggers** tab > **Add Trigger** button.

You can pipe question responses into the custom properties of the cases created by triggers. When the trigger is activated, the response used by trigger criteria is applied to the newly created case as a custom property.

The case triggers are available only if you have a license for the **Case Management** feature.

When the survey responses are piped into a case custom properties, the system maps them to the available property choices. If they match, the case property is set. If they do not match, the response is added to the choices' list of the custom property, but not applied to the case. In the multiple language surveys, only the default survey language is used for matching and adding the custom properties.

- For the **Choose One** question, the responses are piped into the **Choose One** custom property type.
- For the **Fill in the Blank** question with the **Dates** input type, the responses are piped into the **Date** custom property type.
- For the **Fill in the Blank** question with the **Text** input type and the **Choose One** question with the activated **Please Specify** option, the responses are piped into the **Date** custom property type.

You can create multiple properties from a single response.

Procedure

1. On the **Content** tab of the survey designer, add a **Choose One** question to the survey.
2. On the **Triggers** tab, click the **Add Trigger** button.
3. In the **Add Trigger** dialog box, in the **Description** text box, enter a short summary of the trigger.
4. On the **Trigger Action** menu, select the **Create a Case** option.
5. On the **Criteria** tab, define the trigger criteria.
6. Click the **Case Details** tab.
7. On the **Case Details** tab, define the case details.

The case properties are available only if specified on the **Case Setup** tab by Case Administrator.

8. In the **Custom Properties** section, click the icon next to the custom property into which you want to pipe the survey response.
9. In the **Insert Piped Value** dialog box, select the question that you want to use for piping.
10. Click **OK**.
11. In the **Add Trigger** dialog box, click **OK**.

Using Mathematical Formulas in the Preselected Fields

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a **Fill in the Blank** or **Short Answer** question.

You can apply various mathematical formulas to the preselected fields of the **Fill in the Blank** and **Short Answer** questions in your survey. For example, you can calculate a total for particular fields of the **Fill in the Blank** questions in your survey so that this total is shown in a particular preselected topic of a particular **Fill in the Blank** question. This feature is called **Calculate Fields**. The data obtained through calculations can be used for later data analysis.

The input type for the fields of the above-mentioned types of questions must be set to **Whole Number** or **Real Number** if you want to apply the **Calculate Fields** feature to these fields. Otherwise, the values entered in the fields will be ignored.

In the example below, the following **Fill in the Blank** question is added to your survey.

The following formula can be applied to the preselected **Total** topic: %[1]Q1_1%+%[1]Q1_2%+%[1]Q1_3%+%[1]Q1_4%+%[1]Q1_5%+%[1]Q1_6% (no spaces).

When the respondents take the survey, the values entered in each field of this question will be added and the total will be displayed in the **Total** field (the total will be calculated each time a value is entered in any of those fields).

More complicated mathematical formulas can be used, such as %[1]Q1_1%*(%[2]Q2_1%+%[2]Q2_2%).

Procedure

1. On the **Content** tab of the **Design** tab, add a **Fill in the Blank** question.
2. Make sure that the fields that you want to use in calculations are of the **Whole Number** or **Real Number** input types.
3. Select the topic that you want to be predefined by default.
4. On the **Topic Options** panel, under **Preselected**, enter the appropriate mathematical formula in the text box. The mathematical formula appears in the text field next to the preselected topic.

Pipe values from a file import

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Content** tab > select a question > click icon.

If you added participants to your survey from file import by using the **Add Participants to a Survey** trigger (see Create a file import trigger, page 1175), you can pipe values from this file import into question, choice, and topic text and as preselected responses into **Short Answer**, **Fill in the Blank**, and **Essay** questions.

> Piping from file import is available only for the **Create a List** and **SMS** surveys.

Procedure

1. On the **Content** tab of the **Design** tab, select the needed question.
2. To insert the file import value into the question, choice, or topic text of any survey question, click the needed label, and then on the editing toolbar, click the icon.
3. To insert the file import value into a **Short Answer**, **Fill in the Blank**, or **Essay** question as a preselected response, in the **Question Options** or **Topic Options** panel correspondingly, click the icon in the **Preselected** section.
4. In the **Insert Piped Value** dialog box, click the **File Imports** tab, and then select the file import field that you want to insert into the selected question text or response.

> The **File Imports** tab is available only if the **Add Participants to a Survey** trigger is defined for this survey under **File Import** tab of the **Data Sources** tab (see Create a file import trigger, page 1175).

5. Click **OK**.

   The value placeholder is inserted into the selected question text or response.

When a participant that was added from the file import takes the survey, the value from the corresponding file import field is inserted into the selected question, choice, or topic text or as a preselected response for the corresponding question.

> If you delete a file import that is used as a source for piping, then the corresponding piped values will return no data.

Survey Status

Since the product is built to be a workflow environment, the survey design is broken up into different stages. These stages are assigned a Survey Status where in some cases only certain features can be accessed. This is important to keep in mind as your survey progresses through the survey life-cycle.

Status Details

- Design status, page 550 – This is the state before the survey is opened for the first time.
- Test Mode, page 551 – After the survey is created, it enters **Test** mode. All features of the survey should be tested at this time, before the survey is opened.
- Open a survey, page 553 – The survey is "live" and collecting real data from the survey participants.
- Closed survey, page 554 – The survey is closed and no longer collecting results. The survey can be re-opened under **Schedule**. Any participants accessing the survey will see the survey's **Closed Page**.

Design status

Each survey begins with this survey status. This is the early design phase of the survey.

Since the data tables do not exist until the survey is opened (only at that point the product knows what number and type of questions are going to be asked), some features are limited.

What can be edited when a survey is in the Design status

Surveys with the Design status only allow access to the following areas:

- **Survey Designer** – Used to create and modify the survey.
- **Manage Participants** – Select the survey respondents. The **Participants** link is not available for the **Generate Link** survey distribution type.
- **Write Invitations** – Compose the invitation text.
- **Schedule** – This would not generally be used until a survey is designed. It could be used to deploy a survey that was created from an existing questionnaire, template, or imported questionnaire file.

What cannot be edited when a survey is in the Design status

Survey with the Design status has some limitations. Since the data table for the survey is not created yet, the following features cannot be accessed:

- **Publish Location –** There will be no URL to view the survey as it does not appear online until you open it.
- **Response Manager** page.
- **My Reports** page.

Test Mode

You can test your survey using the **Test** button. Test mode allows the greatest range of features to be accessed during the survey design process. This allows the survey to be tested in almost every way possible, modified if needed, and tested again, until everyone working on the survey is satisfied with it.

All features of the survey should be tested at this time, before the survey is opened.

A simple example of what should be tested is:

- **Survey Appearance –** Look and feel (survey theme especially) of the survey, such as the question order, structure, and design.
- **Functionality –** How the survey functions, such as branching, validation, scoring, and end pages.
- **Survey data –** If data can be extracted from the survey test results in the desired format. Ultimately, the survey is created to collect data that either provides information to build a future plan or to rate past performance. If the current design of the survey does not provide the desired information, it needs to be fixed in Test mode. Waiting until after the survey is Closed is too late.
- **Reporting –** If the reports generated for the survey make sense and contain the right information for the questions being asked. Different questions have different options when reporting. It is important to be sure that the presentation of the data in reports is what is wanted.

> Republishing a survey in Test mode will result in the data table for the survey being dropped and all test records will be deleted. This is important to note if testing on the survey data is still being conducted.

What can be edited in Test mode

Test mode allows all sections of survey design to be edited.

What cannot be edited in Test mode

There are no restrictions in Test mode about what can be edited.

What features work differently in Test mode

The following features work differently in Test mode.

- **Invite Panelists** surveys – As soon as a workgroup member has been added on the **Manage Participants** page, opening survey from the **Collect** tab will allow surveys to be submitted.
- **Create a List** surveys – After a participant has been added under **Manage Participants**, opening survey from the **Collect** tab will allow surveys to be submitted.
- **Allow respondent to update completed survey** – This is unavailable while a survey is in Test mode. This option is set on the **Properties** side tab, which is accessed from the left pane in the survey designer. This allows taking the survey more than once while testing it and checking the survey logic properly. Once a survey is opened, this feature will be turned on and only one submission per respondent will be allowed.

- **Resume survey from last page** – This is unavailable in Test mode, so that survey logic (branching, email triggers, conditional responses, and so on.) is tested.
- **Data table dropped on republish** – When the survey is republished in Test mode, the survey's data table is dropped, deleting all current responses. This is why it is important that the survey is opened from the **Schedule** page before collecting live data.

Open a survey

An open survey collects live data to the database for analysis. Once a survey is opened some features can no longer be accessed. The sections below explain what can and cannot be edited, added or deleted depending on the survey status.

What edits can be made while the survey is Open

A survey that has the Open status allows the following items to be edited:

- All questions can have the following items edited:
  - Question headings
  - Question text
  - Choice and topic text
  - Images

> The modification of the previously published questions might impact the collected results.

- Text block (images and media can be added as well)
- Page breaks
- Section
- Comments

The following modifications can be performed:

- Move items up or down, except for choices
- Delete the following items:
  - Text block (including images and media)
  - Page breaks
  - Section
  - Comments

Full questions of all types can be added to the survey.

What cannot be edited while the survey is Open

A survey that has the Open status restricts the following items from being edited:

- Add, delete, or move choices

Closed survey

This is generally the last stage in the survey life cycle. A closed survey no longer collects new data. A participant trying to access a closed survey will see the survey's Closed page. Once the survey is closed, data analysis begins (although, inside the product, the data can be analyzed at any time in the process).

What can be edited while the survey is Closed

A survey that has a status of Closed allows the following things to be edited:

- The survey can be re-opened from the **Schedule** page.
- Reports can be created, edited, and viewed from the **My Reports** page.
- Survey data can be viewed, modified, and deleted from the **Response Manager** page.

What cannot be edited while the survey is Closed

A survey that has a status of Closed restricts all of the items not mentioned above from being edited.

Reopen a closed survey

After a survey has been closed it is still possible to open the survey again on the **Schedule** page. This can be used to collect more results to the data table.

When a survey is reopened, the status is changed to **Open**.

Reopen a survey immediately

Procedure

1 On the **Collect** tab of the survey, click the **Schedule** link. The **Schedule** page opens.

2 In the row labeled **Open Survey**, click the **Now** icon. The confirmation dialog box opens, and then click **OK**.

Reopen a survey at an assigned time

Procedure

1 On the **Collect** tab of the survey, click the **Schedule** link. The **Schedule** page opens.

2 Select the check box to the left of the **Open Survey**.

3 Click the **Edit** button on the toolbar. The **New Task – Open Survey** dialog box opens.

4 Specify the **Start** day from the calendar by using the **Calendar** .

5 Specify the time from the drop-down menu by using the **Clock** icon .

6 In the **Recurrence** section, specify whether to open your survey multiple times for a set or infinite period. You can set your survey not to open or open daily, weekly, or monthly.

> For more information, see Survey schedule options, page 675.

7 In the **Range of Recurrence** section, set an end date by using the **End By** option or select **No End Date**.

8 In the **Advanced** section, define whether to receive an email confirmation when the task is complete, and then clock **OK**.

> If you reopen the survey, the scheduled responses delivery is performed till the end date expires.

Chapter 6

SMS surveys

Topics

SMS survey overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > **New** menu on the toolbar > click the **Design SMS Survey** option.

You can create SMS surveys by using the EFM standard interface. You can design surveys that will be sent to participants as SMS (Short Message Service) messages.

> You need to have a license for the SMS feature to design, author, and distribute your SMS surveys.

SMS surveys allow establishing instant connection with customers and getting in-the-moment feedback that ensures higher response rates.

The SMS survey questions are passed to the SMS interface module and formatted for transmission to SMS Gateway. From there, they are delivered to the specified mobile participants. The first SMS message sent to the participants denotes they are invited to take the SMS survey. After getting the feedback, you can manage the achieved responses and have them analyzed with EFM and Text Analytics.

SMS feature is fully integrated into the EFM application, which allows using the standard EFM functionality with certain limitations. There is no option to redesign an SMS survey to be an online survey.

Activate SMS Survey feature for a user role

Navigation

Administration tab > **Roles** tab > select the role that you want to edit > **Edit Role** page.

The group and survey administrators can control if the workgroup members can create and distribute SMS surveys based on the user role set of permissions.

You can activate the **SMS Surveys** functionality for a user by creating a new role or editing the existing ones. By default, the **SMS Surveys** permission is enabled for the **Group Administrator**, **Survey Administrator**, and **Survey Author** roles.

If the **SMS Surveys** feature is disabled for a user, the access to the previously created SMS surveys is still available.

Before you begin

- Verify that you have a license for the **SMS** feature.

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. Click the name of the role that you want to edit.
3. On the **Edit Role** page, in the **Surveys** section, select the **SMS Surveys** check box.
4. Click **Save**.

SMS Gateway Settings

Navigation

Configuration tab > **SMS Gateway Settings** tab > **SMS Gateway Settings** page.

You can define the SMS gateway settings for your workgroup. By default, the SMS gateway settings are read only. To edit the SMS gateway settings, select the **Enable SMS Gateway** check box.

The **SMS Gateway Settings** tab is only available for the workgroups with the SMS license enabled. To enable the license, contact your System Administrator.

In the **SMS Gateway Type** list, you can select the type of the SMS gateway to be used: **OPG**, **SMPP**, **MacroKiosk**, **Telefonica SDF**, or **Twilio**. The default value is **OPG**.

OPG SMS gateway type

The following settings are available for the **OPG** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.
- **Incoming Message Username** – User name used by the SMS gateway when sending messages to the EFM system.
- **Incoming Message Password** – Password used by the SMS gateway when sending messages to the EFM system.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** - Originating number or branded text that the invitation message comes from. This setting is optional.
- **Request Reply for Contact List Invitations** - Option that indicates if the message can be replied to the sender. When the check box is selected, then originating number is used for sending the invitation messages. By default, the check box is cleared, in this case the participants receive a message from the company.
  This value applies only to SMS invitations and does not apply to two-way SMS surveys.

Extended parameters

- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **windows-1252**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.

- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

SMPP SMS gateway type

The following settings are available for the **SMPP** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.
- **Second Outgoing Message Server** – Backup server or address for sending messages via the SMPP-Type 1 SMS gateway.
- **Port** – Port for sending messages via the SMS gateway.
- **SMPP Version –** Indication of the SMPP protocol version. The default value is **v3.3**.

Originating Number Settings

- **Originating Number – Number from which the participants receive messages and to which they can reply.**
- **Source TON** – Type of number (TON) value of a sender for sending messages via the SMS gateway.
- **Source NPI** – Numbering plan identification (NPI) value of a sender for sending messages via the SMS gateway.
- **Destination TON** – Type of number (TON) value of a recipient for sending messages via the SMS gateway. The default value is **0**.
- **Destination NPI** – Numbering plan identification (NPI) value of a recipient for sending messages via the SMS gateway.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.
- **Invitation Source TON** – TON value of a sender for sending the first messages via the SMS gateway.
- **Invitation Source NPI** – NPI value of a sender for sending the first messages via the SMS gateway.
- **Invitation Destination TON** – TON value of a recipient for receiving the first messages via the SMS gateway. The default value is **0**.
- **Invitation Destination NPI – NPI value for receiving the first messages via the SMS gateway.**

Extended Parameters

- **Receiver Parameters** – Parameters of a recipient.
- **Transmitter Parameters** – Parameters of a sender.
- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **utf-8**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.

- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

MacroKiosk SMS gateway type

The following settings are available for the **MakroKiosk** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.
- **Originating Routing Token** – Value used for sending messages via the SMS gateway. This setting is optional.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.
- **Service ID** – Value used for sending messages via the SMS gateway.

Extended Parameters

- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **utf-8**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

Telefonica SDF SMS gateway type

The following settings are available for the **Telefonica SDF** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.
- **Outgoing Header Username** – User name value used to communicate with the SMS gateway.
- **Outgoing Header Password** – Password value used to communicate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.
- **Incoming Message Username** – User name used by the SMS gateway when sending messages to the EFM system.

- **Incoming Message Password** – Password used by the SMS gateway when sending messages to the EFM system.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.

Extended Parameters

- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

Twilio SMS gateway type

The following settings are available for the **Twilio** SMS gateway type:

Twilio Settings

- **Account SID** and **Authentication Token** – Credentials that are received while configuring Twilio account.
- **Webhook URL** – The URL to the machine where ESI service is running.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.

Extended Parameters

- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

General settings

The following settings are available for all SMS gateway types:

- **Start Sending Time** – Specifies the time of the day when sending of outgoing SMS invitation messages starts.
- **Stop Sending Time** – Specifies the time of the day when sending of outgoing SMS invitation messages stops.
- **Sending Time Zone** – Specifies the time zone used to interpret the **Start Sending Time** and **Stop Sending Time**.
- **Sending Days** – Specifies the days of the week when sending of outgoing SMS invitation messages occurs.

- **Opt Out Terms** – Specifies the terms that, if included in a participant's response SMS, denote that a participant opts out of taking a survey. The default opt out term is **stop**. You can add more terms in a pipe (|) delimited list.

> If no sending days are selected, the error message notifying that no SMS invitation is sent appears after clicking the **Save Setup** button.

- **Error Survey URL** – Specifies the address of a survey that is used to collect error messages.
- **Maximum Outgoing Messages per Second** – Specifies the maximum number of outgoing messages per second. The default value is **0**. This setting is optional.

SMS staging directories

For each valid SMS gateway, the defined SMS gateway settings are stored in the staging directories located in the AppData directory. You can find the staging directories in the following locations:

- {EFM install} AppData/{GroupId}/sms/incoming
- {EFM install} AppData/{GroupId}/sms/realtime
- {EFM install} AppData/{GroupId}/sms/archive
- {EFM install} AppData/{GroupId}/sms/error
- {EFM install} AppData/{GroupId}/sms/process

Create an SMS survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > **New** menu on the toolbar > click the **Design SMS Survey** option.

You can create a survey to be sent to participants as an SMS. The duplicate of an SMS survey is another SMS survey. There is no option to redesign an SMS survey to be an online survey.

Before you begin

- Verify that you have a license for the **SMS** feature.

Procedure

1 On the **My Surveys** page, on the **New** menu, select **Design SMS Survey**.

2 In the **Name Your Survey** dialog box, type your survey name, and then click **OK**.

3 On the **Design** tab > **Content** tab, select the question that you want to add.
The question is added to your survey.

With EFM 15.1 FP4, SMS surveys are rendered only in the **Modern** survey rendering mode with no option to change it. The SMS Surveys that were created prior to 15.1 FP4 are automatically republished to the **Modern** survey rendering mode (republishing may take some time). For more information about survey rendering modes, see Survey rendering overview, page 414.

SMS survey design overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > **New** menu on the toolbar > click the **Design SMS Survey** option > **Design** tab.

You can design your SMS survey using the available design options and features to create the appropriate look and feel of your SMS survey.

Each page in an SMS survey can contain only one visible question. A visible question from the first page is sent to the SMS survey participant, which creates a session for this participant. All the hidden questions are ignored and are not sent to the participant. A participant can proceed to the next question only after the completion of the previous one.

> If there are no visible questions or there is more than one visible question on the page, the corresponding warning messages appear at the top of the page.

SMS survey supports the **Short Answer** question, **Essay** question, and **Text** block. You can also make your SMS survey organization scoped by adding one of the library system questions (**Organization External ID** or **Employee External ID**). The organization scoped questions are added to an SMS survey as hidden with no option to change the visibility.

> You can copy and paste questions from other surveys if they are valid for the SMS survey.

SMS survey limitations

All the content available in an SMS survey functions similarly to an online survey with the following limitations:

- **Question Options** are limited to **Visibility**, **Destination**, **Additional CSS Keywords**, and **Custom Properties**.

> The **Conditional Visibility** option is not available for the SMS survey questions.

- Text formatting is not available.
- The editing toolbar contains only the **Insert Piped Value** option.

> There is a counter for the entered text characters available only for an SMS survey.

The following features are not available when designing an SMS survey:

- **Export to EFM Offline Mobile** feature
- **Bulk Edit** link at the bottom of the **Content** tab

Design tab in SMS survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Design** tab.

You can customize the look and feel of your SMS survey.

The **Design** tab in an SMS survey is limited to the following tabs:

- Content
- Pages
- Branching
- Quotas
- Triggers
- Advanced
- Properties
- Comments

The **Formatting**, **Labels**, and **Translation** tabs are not available in the SMS survey.

The **Content** tab functions as in a regular mode with certain question limitations. For more information, see Create an SMS survey, page 564.

The **Branching**, **Triggers**, and **Comments** tabs function as in a regular mode.

The **Pages** tab does not support text formatting. The editing toolbar contains only the **Insert Piped Value** option. The **Behavior** option in page designer is limited to **Standard Confirmation Page**. Also the following end pages are not available: **Survey Saved**, **Invalid Access**, **Prevent Updates**, and **JavaScript Required**.

The **Advanced** tab includes only the **Web Services Event Handler**, **Version History**, and **All Survey Spell Check** properties.

The **Properties** tab includes only four **General** sections (**Description**, **Tags**, **Survey Owner**, and **Share Access**), **Statistics**, and **Custom Properties**.

Block sending of SMS survey end page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > **Collect** tab > **Overview** dashboard for SMS survey.

You can block sending of the SMS survey end page to the respondents using the IGNORE_END_PAGE token.

Procedure

1. Log in to the EFM application.
2. Create an SMS survey with more than one page.
3. In the SMS survey designer, click the **Pages** tab.
4. On the **Pages** page, expand the **End Pages** section.
5. Click the **Add Custom End Page** link.
6. In the **Design Custom End Page** dialog box, on the **Count respondents who reach this page as** menu, click **Completed**.
7. In the text editing area, type IGNORE_END_PAGE.
8. Click **Save**.

Overview dashboard for SMS survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Overview** dashboard for SMS survey.

You can use the **Overview** dashboard to view information about general activity in your SMS survey and about survey participants.

When distributing an SMS survey, you cannot choose among different distribution methods. The **SMS Survey** distribution is the only available method. It is based on the **Email List** distribution method.

> There is no option to create an invitation for your SMS survey. The first SMS message is sent to the specified participants, which means they are invited to take the SMS survey.

The participants statuses pie chart

The participants statuses pie chart displays the relative counts of SMS survey participants. You can choose to view the **All Participants** chart or **Overall Campaign** chart by selecting one of these options on the **Chart** menu.

When the **All Participants** chart is selected, the following pie chart sections are displayed:

- **Not Yet Invited** – The participants who are added to the SMS survey.
- **Invited** – The participants who are invited to take the SMS survey.
- **Started** – The participants who started the SMS survey.
- **Completed** – The participants who completed the SMS survey.

When the **Overall Campaign** chart is selected, the following pie chart sections are displayed:

- **Sent** or **(In Queue)** – The participants to whom the invitation to take the SMS survey was sent. The **In Queue** status appears if the invitation was sent, but there was no delivery confirmation from the mail server.
- **Undeliverable** – The participants to whom the sending of SMS invitation failed.
- **Unsubscribed** – The participants who opted out from taking the SMS survey.
- **Started** – The participants who started the SMS survey.
- **Completed** – The participants who completed the SMS survey.

> If an SMS fails to be sent to a participant, a message notifying about the failure appears in the **Message** column on the **Manage Participants** page. This column is not visible by default.

You can also view the total number of participants at the bottom of the Campaign pie chart section.

Quick access links

You can quickly access the main distribution options clicking the following links positioned above and below the Campaign pie chart:

- **Additional Distribution Options** – Opens the **Keyword Trigger** section where you can enter a keyword that is used as a trigger to send a survey to the participants. The participants need to text the keyword to a specific phone number. This option is only available when the survey is open.

> Only one keyword can be used at a time for a survey. You can change the existing keyword.

- **View Participants** – Opens the **Manage Participants** page.
- **Import Participants** – Opens the **Import Participants** dialog box.
- **Email this Report** – Opens the **Send Report** dialog box, where you can enter the email address to send the copy of the report.
- **Printable View** – Opens the **Printable View** dialog box, where you can view and print the Campaign SMS report.

> The **Email this Report** and **Printable View** options are available only for the **Overall Campaign** chart.

The Scheduled Import grid

The **Scheduled Import** grid allows you to schedule the import of files containing participants' information. Click the **Schedule a File Import** link to open the **Schedule Import** dialog box. When the file import is scheduled, the file name and the import date are displayed in the **Scheduled Import** grid. You can change the schedule import settings by clicking the file name. You can also import the file at any suitable time by clicking the **Import Now** button next to the file name. For more information about the schedule import process, see Schedule Participants Import, page 655.

The Activity grid

The **Activity** grid displays the information about the file import activity. You can view the following columns:

- **File Delivered** – Shows the file name.
- **Import Start** – Shows the time when EFM started importing the file.
- **Import End** – Shows the time when EFM completed importing the file and delivered it to the SMS interface.
- **Elapsed Time** – Shows the amount of time the importing process took.
- **Invite Start** – Shows the time when the participants invitation process started.
- **Invite End** – Shows the time when the participants invitation process finished.
- **Status** – Shows the status of the imported file.
- **Rows** – Shows the total number of rows (participants) in the imported file.
- **Invalid Rows** – Shows the number of invalid rows (participants) in the imported file.
- **Invited** – Shows the total number of participants invited to take the survey.
- **Completed** – Shows the total number of participants who completed the survey.
- **Details** – Enables users to view the import task details.

The **Invited** and **Completed** counts are links, which take you to the **Manage Participants** grid where you can view the information about all the invited participants or participants who completed the survey.

SMS survey—Manage Participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > click the **Participants** link or **Participants** tab.

You can add participants to your survey, view their contact information and invitation status, import a list of participants into the survey, and export their data into different file formats.

Viewing participants information

The **Manage Participants** grid provides you information about each participant added to the survey. You can sort survey participants in the grid by clicking the column heading. To change the width of a column, drag its edge.

In addition, you can display more or fewer participants in the **Manage Participants** grid. At the bottom of the grid, the toolbar enables you to adjust the number of participants displayed on one page. The default number of participants per page is 10; however, you can select up to 100 participants to be displayed in your grid.

In the **Manage Participants** grid, the following fields are available:

- **Record ID** – Unique record ID in the database.
- **Mobile Number** – Participant's mobile number.
- **Started** – Time when the participant first accessed the survey.
- **Completed** – Time when the participant completed the survey.
- **Branched Out** – Time when the participant was branched out of your survey.
- **Over Quota** – Time when the participant reached the over quota limit.
- **Last Modified** – Last time when the participant accessed the survey.
- **Invitation Status** – Status of whether the invitation is sent to the participant.
- **Campaign Status** – High priority action taken by the participant while answering the survey.

> You can add additional fields to the **Manage Participants** grid, using the **Columns** button on the toolbar.

Click the **Record ID** value in a specific row to view the detailed information on the participant.

To manage all participants, select the check box next to the **Record ID** column heading.

Adding participants to your survey

On the **Manage Participants** page, you can add participants to your survey by clicking the **Add** menu options:

- **Mobile Numbers Only** – Enter the mobile number of the person you want to invite to the survey. You can type a list of delimited mobile numbers directly or copy a list of mobile numbers into the field.

- **Add Individual Participant** – Enter the mobile number, culture, and keys (1-3) for the individual participant to access the survey. The second and third keys are optional and all of the keys must be entered correctly by the participant in order to access the survey.
- **Import Participants** – Upload a file with a list of participants into the survey. You can import .csv, .tsv, .txt, and .xlsx file formats. The first line in a file must contain only identifying headers going from left to right. These headers are used to tell the product what values are assigned to each column in the database when the file is imported. Each participant entry must start on a new line in the file.

When importing participants from a .csv or .xlsx file, remove any extra worksheets from the file.

- **Schedule Import** – Upload participants from a file automatically. For more information about the schedule import process, see Schedule Participants Import, page 655.

After you add participants to a survey, a .csv file containing each participant's mobile number and survey URL is generated and placed at {EFM install}AppData/{group ID}/sms/incoming. The .csv file is generated only when the survey is open. If you open a survey with the already added participants, the dialog box confirming the invitation of those participants opens. After the .csv file is generated and delivered to the EFM SMS Interface module, the participants are marked as invited.

Add individual participants to an SMS survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Add** menu > click **Add Individual Participant**.

You can add an individual participant to your SMS survey by specifying the mobile number, keys, and culture.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Add Individual Participant**.
2. In the **Add Individual Participant** dialog box, in the **Mobile Number** text box, enter the mobile number of the participant.
3. Click the **Optional Fields** link to select the participant's culture and enter the keys for the participant to access the survey.
4. In the **Key 1** field, enter the first key.
5. In the **Key 2** field, enter the second key.
6. In the **Key 3** field, enter the third key.
7. In the **Culture** list, select the participant's language.
8. Click **Add Participant**.

The participant is displayed in the **Manage Participants** grid.

Add participants to an SMS survey by importing

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid >create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Add** menu > click **Import Participants**.

You can add multiple participants to your SMS survey by importing a file with a list of participants. You can import .csv, .tsv, .xlsx, txt, and .zip file formats.

The first line in a file must contain only identifying headers going from left to right. These headers are used to tell the application what values are assigned to each column in the database when the file is imported. Each participant entry must start on a new line in the file.

Before you begin

- When importing participants from a .csv or .xlsx file, remove any extra worksheets from the file.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Import Participants**.
2. In the **Import Participants** dialog box, click **Browse** to navigate to the file you want to upload.

> All times must be imported in UTC time. When you upload them, they appear in the default time zone set on the **My Account** tab.

3. Select the file, click **Open**, and then click **Next**.
4. In the **Map Fields** dialog box, match the imported columns to the corresponding respondent fields, and then click **Next**.
5. Click **Import**.

The imported participants list is displayed in the **Manage Participants** grid.

Add participants to an SMS survey by mobile

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Add** menu > click **Import Participants**.

You can add multiple participants to your SMS survey by specifying their mobile numbers.

You can also add participants to an SMS invitation from here. For more details, see Add participants by mobile numbers, page 651.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Import Participants**.
2. In the **Add Mobile Numbers** dialog box, enter participants' mobile numbers, separated by commas or semicolons.
3. Click **Add Participants**.

The new participants are displayed in the **Manage Participants** grid.

Export SMS survey participants list to a file

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Export** menu > select the appropriate file format.

You can export your participant list to the different file.

On the **Export** menu, the following file formats are available:

- CSV (Comma delimited)
- TSV (Tab delimited)
- Microsoft Excel
- SPSS

Procedure

1 On the **Manage Participants** page, on the **Export** menu, select the appropriate file format. The export file is generated in the selected format.

> Time stamps are exported in UTC time.

2 Click the link that appears to save or open the file.

3 Click **Close**.

Search for SMS survey participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Search** option.

You can quickly find the required participants by their mobile numbers.

Procedure

1 In the **Manage Participants** grid, in the **Mobile Number** search field, type the mobile number of the participant that you want to find.

2 Click the **Search** icon .

Entries with a similar mobile number appear in the **Manage Participants** grid.

To remove the current filter conditions, in the **Quick Search** notification message, click the **clear** link.

View SMS survey participant information

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > click the **Record ID** value.

You can view the detailed information about each participant added to your survey.

Procedure

1. In the **Manage Participants** grid, click the **Record ID** value in a specific row.
2. In the **Participant Information** dialog box, view the detailed information on the selected participant.
3. To close the dialog box, click **Close**.
   To print the information, click **Print**.

Delete participants from an SMS survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new SMS survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Delete** menu on the toolbar.

You can remove participants from your SMS survey. When you delete the participants on the **Manage Participants** page, they will no longer be able to access the survey or edit their responses.

Procedure

1. On the **Manage Participants** page, select the check boxes next to the participants that you want to remove from your survey.
2. On the **Delete** menu, select **Delete Selected Participant(s)**.
3. In the **Delete Participant(s)** dialog box, click **Delete Participant**.

> To remove the targeted participant responses associated with the current survey, on the **Delete** menu, click **Clear Participant Responses**.

Collect your survey results

Topics

Overview dashboard

Navigation

My Surveys grid > **Collect** view > the needed distribution method. For **Create a List**, **Require a Passcode**, and **Invite Panelists**, click the **Skip to Dashboard** button to access the **Overview** dashboard.

You can view, add, and manage your survey campaigns by using the corresponding widgets.

> If more than one campaign is added to the survey, the **Overview** dashboard is renamed to **Campaigns**. For details about multi-campaign surveys, see Adding multiple campaigns to survey, page 586.

To learn more about widgets functionality, on the **Overview** dashboard for each campaign type, follow these links:

- Generate Link – Overview dashboard, page 595
- Create a List - Overview dashboard, page 601
- Invite Panelists - Overview dashboard, page 611
- Social Media campaign, page 589
- Offline Device campaign, page 593
- QR Code campaign, page 591
- Require a passcode – Overview dashboard, page 606

To learn about Overview dashboard for SMS survey, follow this link:

- Overview dashboard for SMS survey, page 568

Map survey or profile to file import

Navigation

Create a new survey or open an existing one from the **My Surveys** grid. Click the **Collect** tab. On the **Choose How to Collect Your Survey Results** page, select one of the distribution methods. For the **Create a List**, **Require a Passcode**, and **Invite Panelists** distribution methods, click **Skip to Dashboard**. On the **Overview** dashboard, click **Open Now**. Click the **Data Channels** side tab.

OR

On the **Analyze** tab, click **View Responses**. On the **Response Manager** page, click the **Data Channels** side tab.

OR

On the **Panel** tab, click the **Profiles** side tab. Select the profile, go to the **Analyze Profile** tab, and then click the **Data Channels** side tab.

On the **Data Channels** side tab, you can map your survey or profile to a data store via data channel to add more attributes to the participant data. After adding a data store to a survey or profile, you use it to view its data on the **Response Manager** grid and to create report elements.

The survey or profile that you want to map to a data store need to have at least one **Short Answer** question that matches the data type of the data store unique field.

> The data from the data store becomes available on the **Response Manager** grid and for reporting only after a survey respondent submits a survey with the response that matches to one of the values from the corresponding data store column.

Before you begin:

- Verify that your data store is published.
- Verify that your survey is open and the profile is published.

Procedure

1. On the **Data Channels** page, click the **Add File Import** link.
2. In the **Add File Import** dialog box, select the data store that you want to use, and then click **Add**.

> Only published data stores and the ones that have not been used to create a data channel for the current survey or profile are shown in the dialog box.

3. In the **Matching Survey Question** or **Matching Profile Question** drop-down menu, click the question that matches the specified data field. The selected question will be used to identify the matching record in the data store and update the profile or survey data accordingly.

> If none of the survey or profile questions match the specified data field, the **Matching Survey Question** and **Matching Profile Question** drop-down menus are unavailable.

4. To save the created data channel, click in the area out of the data channel. You cannot edit the data channel anymore.
5. To add another data store to your survey or profile, click the **Add Data Store** link.

To delete the data channel, click the delete icon to the rightmost of this data channel. When deleting a data channel, any elements associated with this data channel (report elements, filters, **Response Manager** columns, and others) become unavailable.

Participant status

Navigation

My Surveys grid > open an existing survey or create a new one > **Collect** tab > select the survey distribution method > **Overview** dashboard > view the campaign statuses for your survey.

In the EFM application, survey participants can have different statuses that depend on their participation in the survey.

Following are the primary participant statuses:

- **Not Yet Invited** – Participants that were not invited to take the survey.
- **Invited** – Participants that were invited to take the survey.
- **Started** – Participants that started the survey.
- **Completed** – Participants that completed the survey.

Following are the secondary participant statuses, which are the subcategories of the **Invited** status:

- **In Queue** – Participants to whom the invitation was sent, but there was no delivery confirmation from the mail server.
- **Sent** – Participants to whom the invitation was sent.
- **Confirmed Received** – Participants that opened the invitation but did not click the survey URL (to make sure that the **Confirmed Received** status is tracked for your survey, select the **Enable "Confirmed Received" tracking** check box in the invitation designer > **Advanced Features** dialog box (see Advanced Features of invitation, page 625).
- **Unsubscribed** – Participants that opened the invitation and clicked the **unsubscribe** link.
- **Bounced Back** – Participants to whom the invitation was sent, but email did not make it to the participant and bounced back from server or email address.
- **Undeliverable** – Participants to whom the invitation was sent, but an immediate notification from the server was received, which can be caused by numerous reasons.

> The participants statuses pie chart on the **Overview** dashboard (**Collect** tab) displays only the primary statuses and the **Branched Out** and **Over Quota** statuses (for details, see Branched Out and Over Quota statuses, page 585).

Branched Out and Over Quota statuses

Navigation

My Surveys grid > open an existing survey or create a new one > **Collect** tab > select the survey distribution method > **Overview** dashboard > view the campaign statuses for your survey.

You can report on the Branched Out and Over Quota participants as a part of your campaign to have the better vision of the exact status of each participant. These statuses are available for all survey distribution types.

When you define the participant's status on the end page, the participant's campaign status is updated accordingly. For example, if you select the Branched Out status on the end page, the participant's campaign status is Branched Out if they reach this page (for details, see Branched Out and Over Quota on the End Pages, page 400).

If no Branched Out or Over Quota end page is used in a survey, no status appears. If a Branched Out or Over Quota end page is used but no participants reach it, the status appears and the number of respondents is 0.

You can view the Branched Out and Over Quota statuses in the **Campaign Status** column on the **Manage Participants** and **Response Manager** pages. You can also view these statuses on the participant status pie chart on the **Overview** page.

> The participant status pie chart is also available in a survey summary on the **My Surveys** page upon clicking ▶ next to the needed survey.

You can click any pie slice to go to the **Manage Participants** page and view only the participants that have the selected status. For example, click the Branched Out pie slice to view the list of participants who are branched out from your survey (for details, see Create a List - Overview dashboard, page 601).

Adding multiple campaigns to survey

Navigation

My Surveys page > create a new survey or open an existing one > **Collect** tab > select the survey distribution method (except for **Require a Passcode**) > **Overview** dashboard > **Add Campaign** menu.

On the **Overview** dashboard, you can add multiple campaigns to your survey. With this functionality, you can distribute the same survey via different methods without creating and publishing a new survey each time.

Multiple-campaign surveys cannot be distributed via the Require a Passcode method. If a survey is already distributed as Require a Passcode, you cannot add other campaigns to it.

Adding a campaign automatically creates a corresponding widget on the **Campaigns*** dashboard that is used to manage this campaign.

Once you add more than one campaign to your survey, the **Overview** dashboard is renamed to **Campaigns**.

To add a new campaign, click the **Add Campaign** menu at the bottom of the existing widget.

In Classic survey rendering, multiple-campaign feature is only available for Generate Link surveys, and you can add only the Offline Device campaign. For details about Classic survey rendering, see Survey rendering overview, page 414.

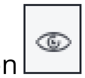
You can add the following campaigns to your survey:

- **Survey Link** – Add a Survey Link campaign, and then use the widget to take a survey using the generated survey URL, or view a live version of your survey. You can also copy the URL and paste it into an email message or a website. For details, see Generate Link – Overview dashboard, page 595.
- **Contact List** – Add a Contact List campaign, and then use the widget to add participants to this campaign. You can add multiple Contact List campaigns to a survey and provide custom names for each of them. For details, see Create a List - Overview dashboard, page 601.

Participants with preloaded data can be imported only into a Contact List campaign. Make sure that the survey is open.

- **Panelist** – Add a Panelist campaign, and then use the widget to add panelists to this campaign. You can add multiple Panelist campaigns to a survey and provide custom names for each of them. For details, see Invite Panelists - Overview dashboard, page 611.

For Contact List and Panelist campaigns, creating an Initial Invitation, reminders, or a Thank You message directly from a widget adds these messages to the corresponding campaign only.

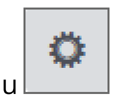
Profile questions and piped values for the Panelist campaign are hidden from the respondents that belong to other campaign types. For the profile questions, the conditional visibility icon  appears next to the question heading in the survey designer.

- **Social Media** – Add a Social Media campaign, and then use the widget to select one or multiple websites where you wish to post your survey URL. (for details, see Social Media campaign, page 589).

> Make sure that the **Enable publishing to social media sites** check box is selected on the **Administration** tab > **General Setup** side tab. If you do not have access to the **General Setup** side tab, contact your Group Administrator.

  You can post to the following websites:

  - Facebook
  - LinkedIn
  - Twitter
  - Reddit
  - Pinterest
  - Google+

- **Offline Device** – Add an Offline Device campaign, and then use the drop-down menu  on the widget to distribute your survey via the following options:
  - **Add Device** – Select the device to send your survey to. You can select any device that is registered on the **Administration** tab (see Register a Device, page 1388 and Send a survey to the device, page 1471). After adding at least one device, the **Offline Devices** side tab appears on the **Collect** tab, where you can manage all devices that are added to the survey (see Manage Offline Access, page 1468).
  - **Import Devices from Survey** – Select the survey to import devices from (see Import a device from another survey, page 1470).
  - **Export to EFM Offline Mobile** – Export your survey into the EFM Offline Mobile product in the .que format (same as clicking **Export** > **EFM Offline Mobile** in survey designer, see MS Word and PDF export options, page 185).

> The **Export** > **EFM Offline Mobile** option in survey designer is available only for open surveys with the Offline Device campaign.

  For surveys created prior to EFM 15.1 FP4, if there are devices added to the survey, the Offline Device campaign is automatically created and displayed on the **Campaigns** dashboard.

- **QR Code** – Add a QR Code campaign, and then use the widget to download a QR Code image. You can take a survey by scanning a QR code that will redirect you to a survey. The survey URL is unique for this campaign. Click the Download Image link to download the QR Code image.

> You can add Survey Link, Social Media, Offline Device, and QR Code campaigns only once for a survey.

In addition, on each widget, you can view the participant status pie chart and table, test the survey, and delete the campaign (before the survey is opened).

In the **Response Manager** grid, for multiple-campaign surveys, the **Campaign Type** column appears by default. In addition, you can add the **Campaign Name** (custom name for Contact List and Panelist campaigns) column to the grid by using the **Columns** button.

Social Media campaign

Navigation

Design & Collect tab > **Surveys** side tab > **My Surveys** page > select the needed survey > **Collect** tab > select any distribution type except for **Require a Passcode** > **Overview** dashboard > **Add Campaign** menu > **Social Media** campaign.

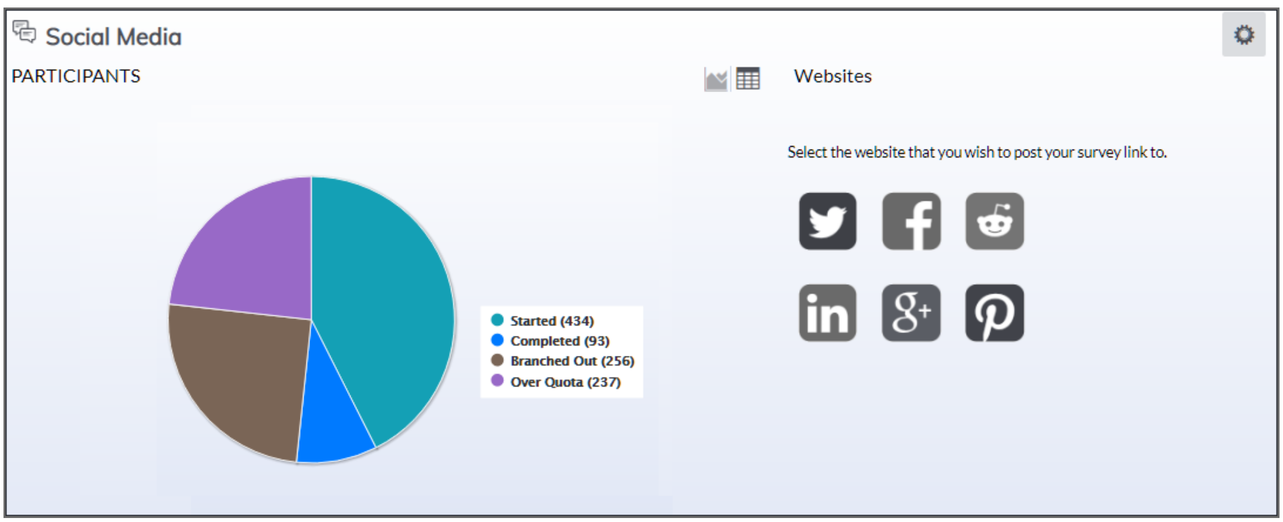
You can post your survey to one or multiple websites by adding the Social Media campaign on the **Overview (Campaigns)** dashboard.

> Make sure that the **Enable publishing to social media sites** check box is selected on the **Administration** tab > **General Setup** tab. If you do not have access to the **General Setup** side tab, contact your Group Administrator.

You cannot add a Social Media campaign if this campaign already exists for the current survey or if your survey is distributed via Require a Passcode method.

To add a Social Media campaign to your survey, use the **Add Campaign** menu on the **Overview (Campaigns)** dashboard (see Adding multiple campaigns to survey, page 586).

After adding a Social Media campaign, the corresponding widget appears on the **Campaigns** dashboard.



Social Media widget on Campaigns

With the **Social Media** widget, you can do the following:

- In the **Participants** section, view the participant status pie chart or table for the campaign. The following participant statuses are available for the Social Media campaign:
  - **Started** – Participants who have started the survey.
  - **Completed** – Participants who completed the survey
  - **Branched Out** – Participants who were branched out from the survey. This status is available only if branching was designed for the survey.

  - **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the **Design** or **Collect** tab > **Quotas** side tab.
- In the **Websites** section, select the website to post your survey link to. You can post to the following sites by clicking the corresponding icon:
  - Facebook
  - LinkedIn
  - Twitter
  - Reddit
  - Pinterest
  - Google+

You need to open the survey before you can post it to websites.

  Clicking a website icon opens a page of the corresponding website in a new tab, where you can edit and share your post.

  The survey link is the same for all sites, which means that the responses collected from different sites are added to a single Social Media campaign.
- Use the drop-down menu to complete one of the following actions (only before the survey is opened for the first time):
  - **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. You can print or send an email massage with a report by clicking the **Print** or **Email** button correspondingly.
  - **Test** – Test the look and feel of your survey.
  - **Delete** – Remove the Social Media campaign.

QR Code campaign

Navigation

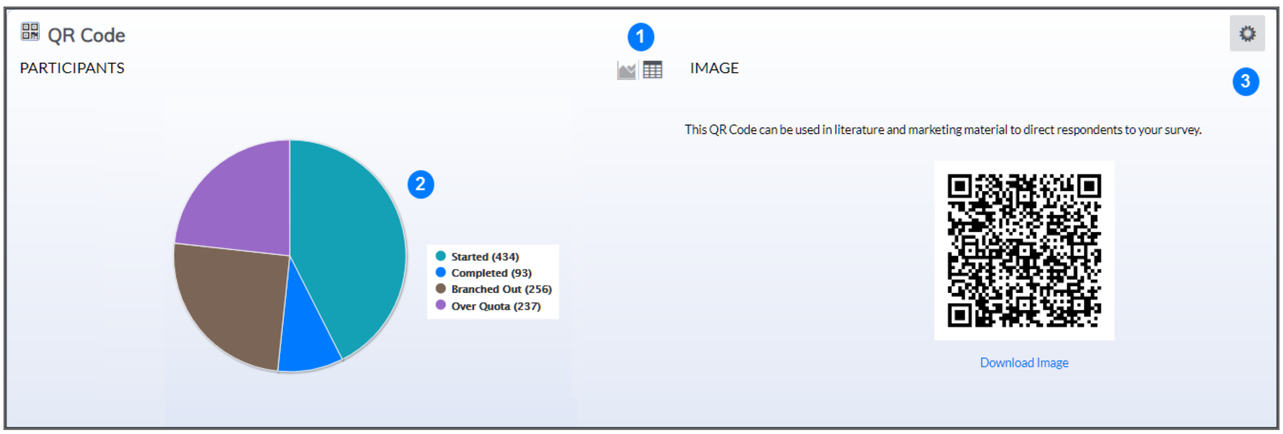
Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Collect** tab > select any distribution type except for **Require a Passcode** > **Overview** dashboard > **Add Campaign** menu > **QR Code** campaign.

You can generate a QR code image for your survey, and then download and attach it to any needed content. Participants can take a survey by scanning the QR code that will redirect them to a survey.

You can add only one QR Code campaign to your survey, but you can also add other campaigns to the same survey (see Adding multiple campaigns to survey, page 586).

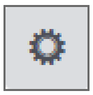
The survey URL is unique for this campaign.

For details about the QR Code widget, see the following image and table.



QR Code widget on Campaigns dashboard

Item	Description
1	Switch between a pie chart and a table view of the participant statuses. Table view additionally displays the percentage for each participant status and the total number of participants.

Item	Description
2	View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following participant statuses are available for the QR Code campaign: • **Started** – Participants who have started the survey, but not completed the survey yet. • **Completed** – Participants who completed the survey. • **Branched Out** – Participants who were branched out from the survey. This status is available only if branching was designed for the survey. • **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the **Design** or **Collect** tab > **Quotas** side tab.
3	Click the  menu to select one of the following actions: • **Click to Generate– Generate a QR code for your survey.** • **Download the Image – Download a QR code.** • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. You can print or send an email massage with a report by clicking the **Print** or **Email** button correspondingly.**Test** – Test the look and feel of your survey (available only before the survey is opened for the first time). When a survey is opened, all the test data is deleted. • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Offline Device campaign

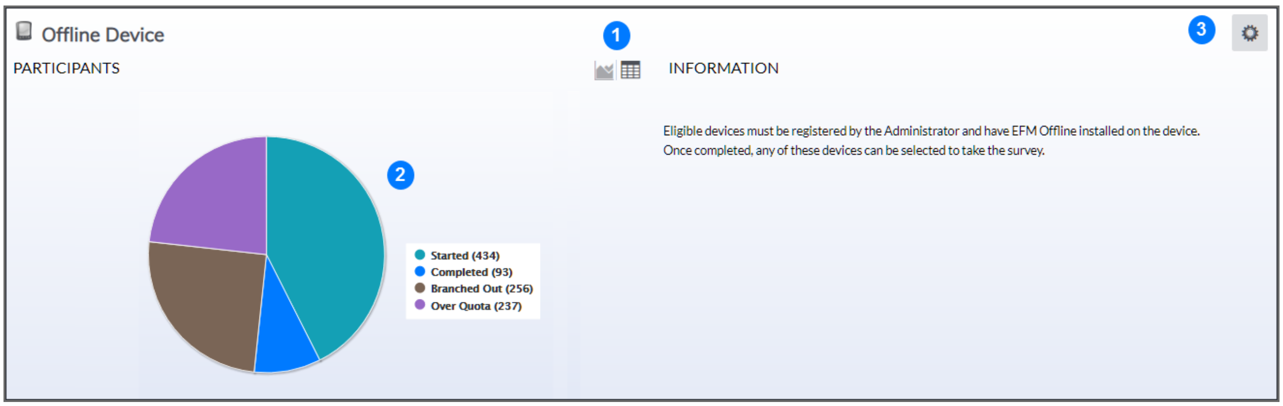
Navigation

Design & Collect tab > **Surveys** side tab > **My Surveys** page > select the needed survey > **Collect** tab > select any distribution type except for **Require a Passcode** > **Overview** dashboard > **Add Campaign** menu > **Offline Device** campaign.

You can add devices to your survey, import devices from a survey, and export devices to EFM Offline Mobile by using the Offline Device campaign.

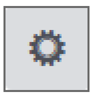
> You can add only one Offline Device campaign to your survey, but you can also add other campaigns to the same survey (see Adding multiple campaigns to survey, page 586).

For details about the Offline Device widget, see the following image and table.



The Offline Device widget

Item	Description
1	Switch between a pie chart and a table view of the participant statuses. Table view also displays the percentage for each participant status and the total number of participants.

Item	Description
2	View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following participant statuses are available for the Offline Device campaign: • **Started** – Participants who have started the survey, but not completed the survey yet. • **Completed** – Participants who completed the survey. • **Branched Out** – Participants who were branched out from the survey. This status is available only if branching was designed for the survey. • **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the **Design** or **Collect** tab > **Quotas** side tab.
3	Click the  menu to select one of the following actions: • **Add Device** – Select the device where to send your survey. You can select any device that is registered on the **Administration** tab (see Send a survey to the device, page 1471 and Devices, page 1388). • **Import Devices from Survey** – Select the survey from which to import devices. • **Export to EFM Offline Mobile** – Export a survey to the EFM Offline Mobile application. • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. You can print or send an email message with a report by clicking the **Print** or **Email** button correspondingly. • **Test** – Test the look and feel of your survey (available only before the survey is opened for the first time). When a survey is opened, all test data is deleted. • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Generate Link – Overview dashboard

Navigation

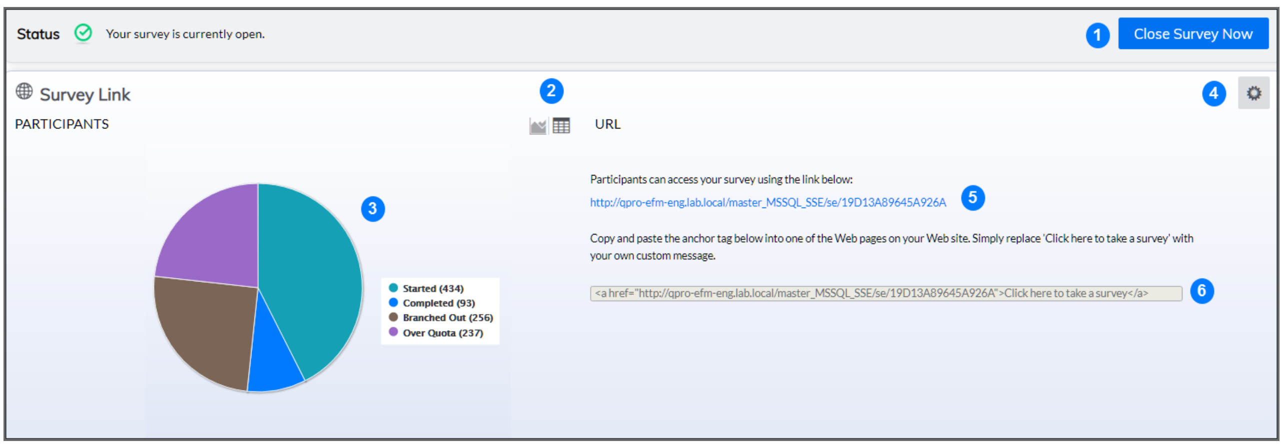
Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Generate Link** distribution method.

With the **Overview** dashboard for the **Generate Link** distribution method, you can view the status of survey participants and the survey URL by using the widget for your **Survey Link** campaign.

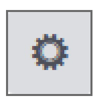
Access to the **Generate Link** survey is unrestricted, and anyone with the URL to this survey can take it; therefore, there is no participants list for this type of survey. For more information, see Copy survey URL, page 598.

> You can add only one **Survey Link** campaign to your survey, but you can also add other campaigns to the same survey (see Adding multiple campaigns to survey, page 586).

For details about the **Overview** dashboard functionality, see the following image and table.



Survey Link widget on the Overview dashboard

Item	Description
1	View the status of the current survey campaign and manage your survey distribution by using the corresponding buttons that guide you through the process: • **Open Survey Now** – Open your survey to make it available for respondents via the survey URL. After opening the survey, some survey features become locked. • **Apply Changes to Survey** – Apply the latest changes that were made to your survey in the survey designer. Clicking this button also opens your survey if it is closed. • **Close Survey Now** – Close your survey to make it unavailable for respondents. After closing the survey, anyone trying to access it will be redirected to the **Survey Closed** page. For details about survey statuses, see Survey Status, page 549.
2	Switch between a pie chart and a table view of the participant statuses. Table view additionally displays the percentage for each participant status and the total number of participants.
3	View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following participant statuses are available for the **Survey Link** campaign: • **Started** – Participants who have started the survey, but not completed the survey yet. • **Completed** – Participants who completed the survey. • **Branched Out** – Participants who were branched out from the survey. This status is available only if branching was designed for the survey. • **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the **Design** or **Collect** tab > **Quotas** side tab.
4	Click the drop-down menu  to select one of the following actions: • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. You can print or send an email message with the report by clicking the **Print** or **Email** button correspondingly. **Test** – Test the look and feel of your survey (available only before the survey is opened for the first time). When a survey is opened, all test data is deleted. • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Item	Description
5	Click the URL to take a survey or to view a live version of your survey. You can copy this URL, paste it into an email message or a website, and add it to an email or a website. If the survey is in **Design** mode, and the survey URL is not generated yet, click the **Click to Generate** link in the **URL** panel. This generates the survey URL and performs the same action as the **Test** option. If the survey is closed, the **Survey Closed** end page opens upon clicking the survey URL. For details, see Copy survey URL, page 598.
6	Copy and paste the HTML snippet of your survey to your website. If the survey is closed, an HTML link is not available. For details, see Add HTML snippet to website, page 599.

Copy survey URL

Navigation

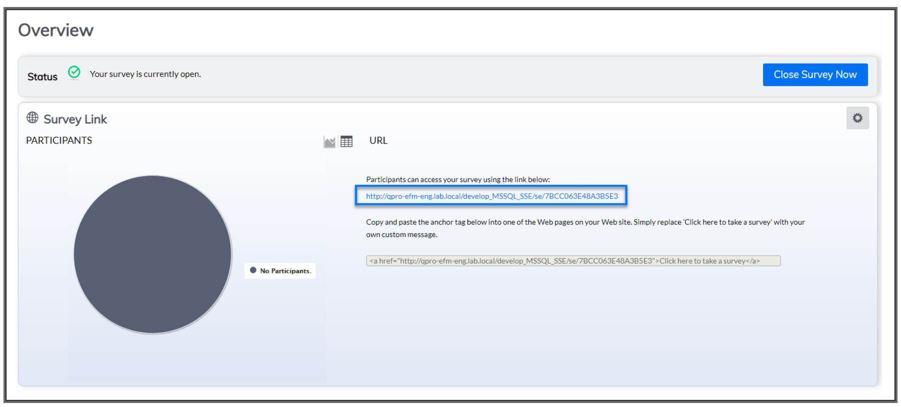
Design & Collect tab > **Surveys** side tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Generate Link** distribution method > **Overview** dashboard.

Using the **URL** panel, you can do the following with the survey URL:

- Copy and paste it onto a web page or an email message.
- Click to take the survey or view and test a live version of your survey.

Procedure

1. Click the **Collect** tab.
2. On the **Choose How to Collect Your Survey Results** page, click **Generate Link**.
3. In the **Open Your Survey Now** dialog box, click **Open Survey Now**.
4. On the **Overview** dashboard, in the **URL** panel, click the survey URL to view a live version of your survey. You can also copy this URL and add it to an email message or a website.



The survey URL

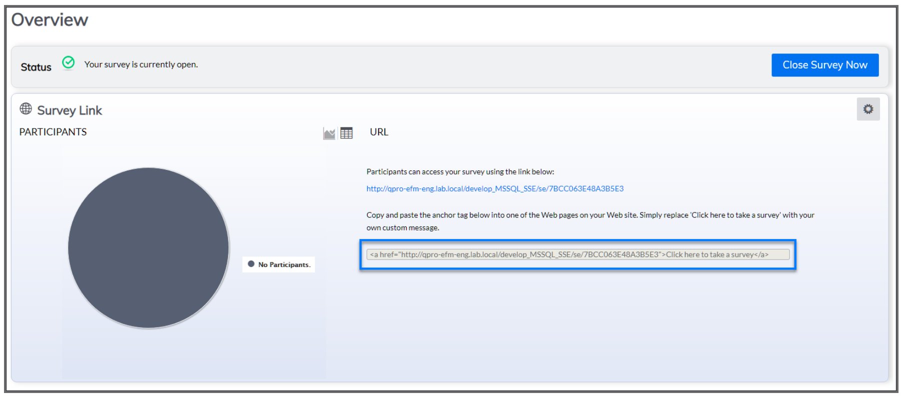
Add HTML snippet to website

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Generate Link** distribution method > **Overview** dashboard.

On the **Overview** dashboard of **Generate Link** distribution method, you can copy and paste the HTML snippet of your survey into your website, blog, or any other place.

This code provides your website visitors with a formatted link to your survey titled "Click here to take a survey."



The HTML snippet on the Overview dashboard

Procedure

1. On the **Overview** dashboard, in the **URL** panel, copy the generated anchor tag.
2. Paste the anchor tag into the HTML of your website.

> You can replace the default title with your own custom title by deleting "Click here to take a survey" in the code snippet and typing your own title in its place (for example, "Please participate in our short survey").

Create a List distribution method

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Create a List** distribution method.

Use the **Create a List** distribution method to restrict access to your survey to specific participants. Only the respondents who received survey invitations to their email addresses can complete the **Create a List** survey.

After you click **Create a List** on the **Choose how to Collect Your Survey Results** page, the **Initial Invitation** page opens, where you can:

- Compose your survey invitation (for details, see Write Invitations, page 616)
- Add participants via **Manage Participants** link (for details, see Add individual participant, page 652)
- Test your invitation (for details, see Test invitation, page 627)
- Schedule your invitation delivery (for details, see Scheduling invitations delivery, page 674)

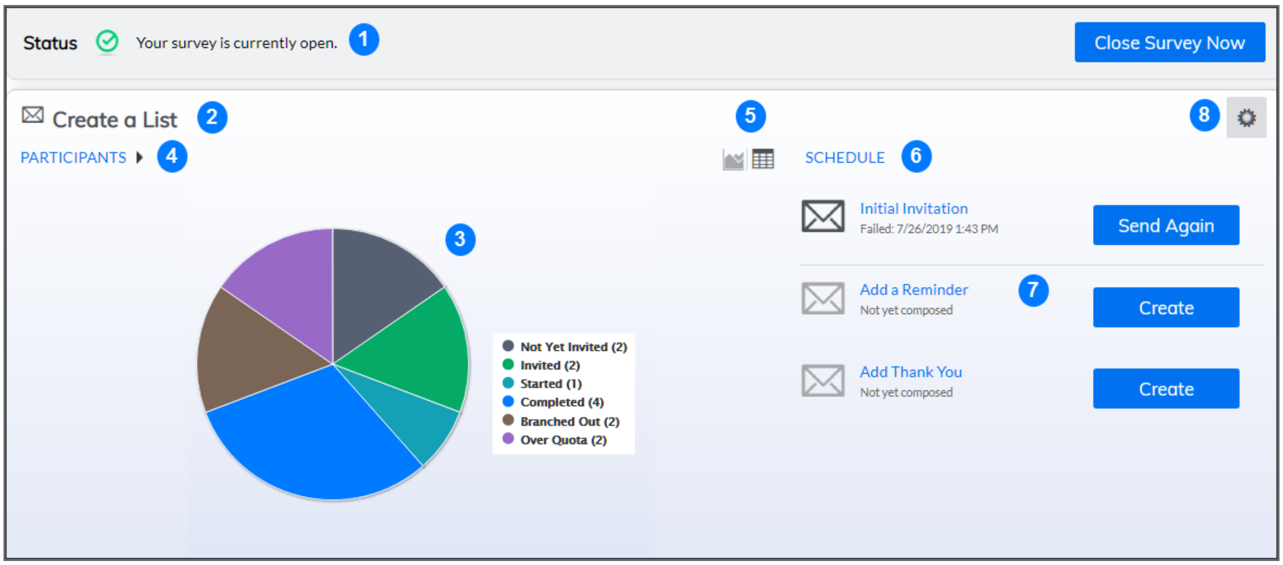
Create a List - Overview dashboard

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Create a List** distribution method > **Initial Invitation** page > **Skip to Dashboard** button > **Overview** dashboard.

With the **Overview** dashboard for the **Create a List** distribution method, you can view general statistics on the survey participant statuses, add participants, and manage survey invitations and scheduling settings by using the widget for your **Contact List** campaign.

For details about the **Overview** dashboard, see the following image and table.



Create List widget on the Overview dashboard

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>1</td><td>View the status of the current survey campaign and manage your survey distribution by using the corresponding buttons that guide you through the process:

Create Invitation – Access the invitation designer to compose the Initial Invitation (unless you did this before getting to the Overview dashboard).
Manage Participants – Access the Manage Participants page to add participants to your survey campaign.
Apply Changes to Survey – Apply the latest changes that were made to your survey in the survey designer. Clicking this button also opens your survey if it is closed.
Open Survey Now – Open your survey to make it available for respondents via the survey URL. After opening the survey, some survey features become locked.
Close Survey Now – Close your survey to make it unavailable for respondents. After closing the survey, anyone trying to access it will be redirected to the Survey Closed page.

For details about survey statuses, see Survey Status, page 549.</td></tr>
<tr><td>2</td><td>Rename your Contact List campaign by clicking the default Untitled List name and typing the custom name. The campaign name must be unique within a multi-campaign survey if more than one Contact List campaign is added.</td></tr>
<tr><td>3</td><td>View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following participant statuses are available for the Contact List campaign:

Not Yet Invited – Participants who are not invited to take the survey.
Invited – Participants who are invited to take the survey. The Invited status includes a number of subcategories that are accounted for but not displayed as separate slices on the pie chart (for more information, see Participant status, page 584).
Started – Participants who have started the survey but not completed it yet.
Completed – Participants who completed the survey.
Branched Out – Participants who were branched out from the survey. This status is available only if branching was designed for the survey.
Over Quota – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the Design or Collect tab > Quotas side tab.
Bounced Back – Participants to whom the invitation was sent, but email did not make it to the participant and bounced back from server or email address.
Undeliverable – Participants to whom the invitation was sent, but an immediate notification from the server was received, which can be caused by numerous reasons.
</td></tr>
</table>

Item	Description
4	If there is at least one invitation created, you can set the pie chart to display participant statuses based on a certain invitation by clicking the arrow next to the **Participants** link and selecting the needed option from the menu, for example, **Initial Invitation** or **Second Reminder**. The **Participants** link changes to **Initial Invitation**, **Reminder**, or **Thank You** correspondingly. Clicking this link brings you to the **Manage Participants** page.
5	Switch between a pie chart and a table view of the participant statuses. Table view additionally displays the percentage for each participant status and the total number of participants. Clicking a pie slice or a status link in the table takes you to the **Manage Participants** grid with the corresponding filter applied. For example, if you click the pie slice that represents the **Invited** participant status, you will be redirected to the **Manage Participants** grid where only the participants invited to take the survey are displayed. Also, if you set the pie chart to display participant statuses based on a certain invitation, the **Manage Participants** grid (displayed after clicking a pie slice) will be filtered accordingly (showing only participants invited via First Reminder, for example).
6	Click the **Schedule** link to go to the **Schedule** page, where you can manage schedule settings for different survey events, such as Open Survey, Send Initial Invitation, Close Survey, and other events. For details, see Schedule page, page 672.
7	Create and manage survey invitations, reminders, and Thank You message by clicking the corresponding link (to go to the invitation designer) and the corresponding button to the right (to send or resend the invitation). You can delete the schedule settings defined for a certain invitation by clicking the delete icon to the rightmost of this invitation.

Item	Description
8	Click the drop-down menu to select one of the following actions: • **Add Individual Participant** – Type the email address of the individual participant. You can also optionally provide the culture and keys (1-3) for the individual participant to access the survey (for details, see Add individual participant, page 652). • **Add Email Addresses** – Type the email address of the person that you want to invite to the survey. You can type a list of delimited email addresses directly or copy a list of email addresses into the field. The application supports simple and extended email formats, for example, user@vovici.com and <First name, Last name> user@vovici.com (for details, see Add participants by email addresses, page 650). • **Add Mobile Numbers** – Type the mobile number of the person that you want to invite to the survey. You can type several mobile numbers separated by commas or semicolons (for details, see Add participants by mobile numbers, page 651). • **Import Participants** – Upload a file with a list of participants into the survey. You can import .csv, .tsv, .xlsx, txt, and .zip file formats. The first line in a file must contain only identifying headers going from left to right. These headers are used to tell the product what values are assigned to each column in the database when the file is imported. Each participant entry must start on a new line in the file (for details, see Add participants by importing a file, page 654). • **Schedule Import** – Upload participants from a file automatically. For details about the schedule import process, see Schedule Participants Import, page 655. • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. If there are any invitations for the campaign, you can filter the information for a particular type of invitation. By default, **Overall Campaign** is selected. You can also print or send an email message with the report by clicking the **Print** or **Email** button correspondingly. • **Test** – Test the look and feel of your survey after adding survey participants (available only before the survey is opened for the first time). • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Require a Passcode distribution method

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Require a Passcode** distribution method.

Use the **Require a Passcode** distribution method to restrict access to your survey by using up to three keys and requiring that participants type these keys before starting the survey.

The **Require a Passcode** survey must start with a **Short Answer** or **Fill in the Blank** question that includes up to three topics with the **Text**, **IDs and Phone Numbers**, and **Postal Codes** input types and has its visibility set to **Shown**. Otherwise, participants will not be able to take the survey.

To access the survey, participants need to type the keys. For example, you may ask, "What is your name?", and the participant is required to type this information correctly before the survey opens. The information that participants type must match the keys you created for each participant in the **Manage Participants** grid. You can send the keys to participants along with the invitation to take the survey. Values to be typed as keys are case insensitive.

After you select the **Require a Passcode** distribution method, you need to create an invitation, schedule it, and add invitation recipients. For further steps, see Write Invitations, page 616.

After you click **Require a Passcode** on the **Choose how to Collect Survey Results** page, the **Initial Invitation** page opens, where you can:

- Compose your survey invitation (for details, see Write Invitations, page 616)
- Add participants via **Manage Participants** link (for details, see Manage Participants Overview, page 646)
- Test your invitation (for details, see Test invitation, page 627)
- Schedule your invitation delivery (for details, see Scheduling invitations delivery, page 674)

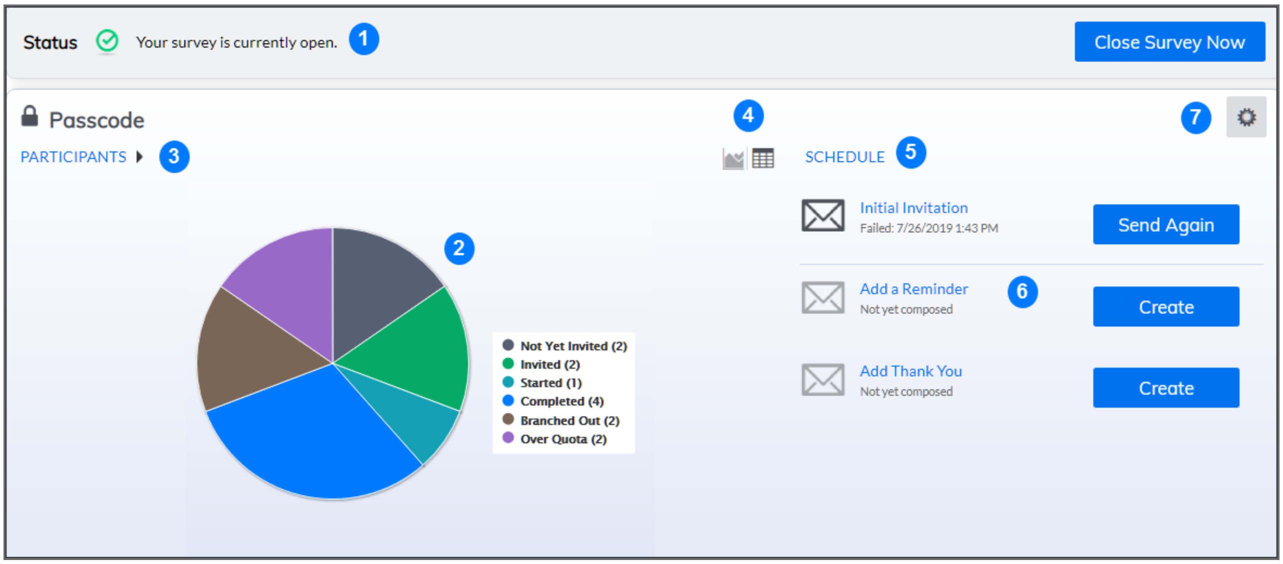
Require a passcode – Overview dashboard

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Require a Passcode** distribution method > **Initial Invitation** page > **Skip to Dashboard** button > **Overview** dashboard.

With the **Overview** dashboard for the **Require a Passcode** campaign, you can view the general statistics about your survey participants, add participants, and manage survey invitations and scheduling settings by using the widget for your **Require a Passcode** campaign.

For details about the **Overview** dashboard, see the following image and table.



Require a Passcode widget on the Overview dashboard

Item	Description
1	View the status of the current survey campaign and manage your survey distribution by using the corresponding buttons that guide you through the process: • **Create Invitation** – Access the invitation designer to compose the Initial Invitation (unless you did this before getting to the **Overview** dashboard). • **Manage Participants** – Access the **Manage Participants** page to add participants to your survey campaign. • **Apply Changes to Survey** – Apply the latest changes that were made to your survey in the survey designer. Clicking this button also opens your survey if it is closed. • **Open Survey Now** – Open your survey to make it available for respondents via the survey URL. After opening the survey, some survey features become locked. • **Close Survey Now** – Close your survey to make it unavailable for respondents. After closing the survey, anyone trying to access it will be redirected to the **Survey Closed** page.
2	View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following campaign statuses are available for the **Require a Passcode** survey: • **Not Yet Invited** – Participants who are not invited to take the survey. • **Invited** – Participants who are invited to take the survey. The Invited status includes a number of subcategories that are accounted for but not displayed as separate slices on the pie chart. • **Started** – Participants who have started the survey, but not completed yet. • **Completed** – Participants who completed the survey. • **Branched Out** – Participants who were branched out from the survey. This status is available only if branching was designed for the survey. • **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the **Design** or **Collect** tab > **Quotas** side tab. • **Bounced Back** – Participants to whom the invitation was sent, but email did not make it to the participant and bounced back from server or email address. • **Undeliverable** – Participants to whom the invitation was sent, but an immediate notification from the server was received, which can be caused by numerous reasons.
3	If there is at least one invitation created, you can set the pie chart to display participant statuses based on a certain invitation by clicking the arrow next to the **Participants** link and selecting the needed option from the drop-down menu, for example **Initial Invitation** or **Second Reminder**. The **Participants** link changes to **Initial Invitation**, **Reminder**, or **Thank You** correspondingly. Clicking this link brings you to the **Manage Participants** page.

Item	Description
4	Switch between the pie chart and table view of the participant statuses. Table view additionally displays the percentage for each participant status and the total number of participants. Clicking a pie slice or a status link in the table takes you to the **Manage Participants** grid with the corresponding filter applied. For example, if you click the pie slice that represents the Invited participant status, you will be redirected to the **Manage Participants** grid where only the participants invited to take the survey are displayed. Also, if you set the pie chart to display participant statuses based on a certain invitation, the **Manage Participants** grid (displayed after clicking a pie slice), will be filtered accordingly (showing only participants invited via First Reminder, for example).
5	Click the URL to take a survey or to view a live version of your survey. You can copy this URL, paste it into an email message or a website, and add it to an email or a website. If the survey is in **Design** mode, and the survey URL is not generated yet, click the **Click to Generate** link in the **URL** panel. This generates the survey URL and performs the same action as the **Test** option. For details, see Copy survey URL, page 598.
6	Click the **Schedule** link to go to the **Schedule** page, where you can manage schedule settings for different survey events, such as Open Survey, Send Initial Invitation, Close Survey, and other events. For details, see Schedule page, page 672.
7	Create and manage survey invitations, reminders, and Thank You message by clicking the corresponding link (to go to the invitation designer) and the corresponding button to the right (to send or resend the invitation). You can delete the schedule settings defined for a certain invitation by clicking the delete icon to the rightmost of this invitation.

Item	Description
8	Click the drop-down menu to select one of the following actions: • **Add Individual Participant** – Enter the email address of the individual participant. You can also optionally provide the culture and keys (1-3) for the individual participant to access the survey (for details, see Add individual participant, page 652). • **Import Participants** – Upload a file with a list of participants into the survey. You can import .csv, .tsv, .xlsx, txt, and .zip file formats. The first line in a file must contain only identifying headers going from left to right. These headers are used to tell the product what values are assigned to each column in the database when the file is imported. Each participant entry must start on a new line in the file (for details, see Add participants by importing a file, page 654). • **Schedule Import** – Upload participants from a file automatically. For details about the schedule import process, see Schedule page, page 672 • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. If there are any invitations for the campaign, you can select the needed invitation type from the list and view only the information for this type of invitation. By default, **Overall Campaign** is selected. You can also print or send an email message with the report by clicking the **Print** or **Email** button correspondingly. • **Test** – Test the look and feel of your survey after adding survey participants (available only before the survey is opened for the first time). • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Invite Panelists distribution method

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Collect** view > **Invite Panelists**.

The **Invite Panelists** distribution method is used when you want to restrict access to your survey for panelists within a workgroup. Only invited panel members from the workgroup can complete the **Invite Panelists** survey.

On the **Choose How to Collect Your Survey Results** page, after you click **Invite Panelists**, the **Initial Invitation** page opens where you can:

- Compose your email message (for details, see Write Invitations, page 616)
- Add panelists via **Manage Participants** (for details, see Manage Participants for Invite Panelists, page 664)
- Test your invitation (for details, see Test invitation, page 627)
- Schedule your invitation delivery (for details, see Scheduling invitations delivery, page 674)

Invite Panelists - Overview dashboard

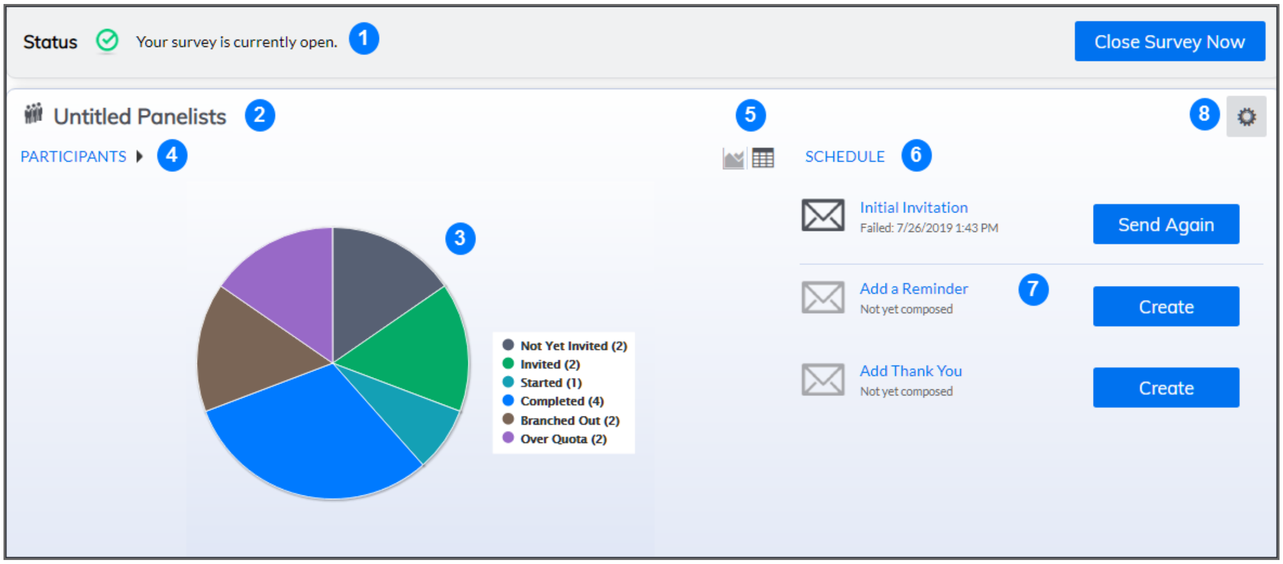
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey > **Choose How to Collect Your Survey Results** page > **Invite Panelists** distribution method > **Initial Invitation** page > **Skip to Dashboard** button > **Overview** dashboard.

With the **Overview** dashboard for the **Invite Panelist** distribution method, you can view general statistics of the survey participant statuses, add participants, and manage survey invitations and scheduling settings by using the widget for your **Panelist** campaign.

You can add only one **Panelists** campaign to your survey, but you can also add other campaigns to the same survey (see Adding multiple campaigns to survey, page 586).

For details about the **Overview** dashboard, see the following image and table.



Invite Panelists widget on the Overview dashboard

Item	Description
1	View the status of the current survey campaign and manage your survey distribution by using the corresponding buttons that guide you through the process: • **Create Invitation** – Access the invitation designer to compose the Initial Invitation (unless you did this before getting to the **Overview** dashboard). • **Manage Participants** – Access the **Manage Participants** page to add participants to your survey campaign. • **Apply Changes to Survey** – Apply the latest changes that were made to your survey in the survey designer. Clicking this button also opens your survey if it is closed. • **Open Survey Now** – Open your survey to make it available for respondents via the survey URL. After opening the survey, some survey features become locked. • **Close Survey Now** – Close your survey to make it unavailable for respondents. After closing the survey, anyone trying to access it will be redirected to the **Survey Closed** page. For details about survey statuses, see Survey Status, page 549.
2	Rename your **Invite Panelists** campaign by clicking the default *Untitled Panelists* name and typing the custom name. The name of the campaign must be unique within multi-campaign survey if more than one **Panelist** campaign is added.
3	View the participants statuses pie chart for the current survey campaign. By default, the pie chart displays statuses for all participants. The following participant statuses can be available for the **Invite Panelists** survey: • **Not Yet Invited** – Participants who are not invited to take the survey. • **Invited** – Participants who are invited to take the survey. The Invited status includes a number of subcategories that are accounted for but not displayed as separate slices on the pie chart. • **Started** – Participants who have started the survey, but not completed it yet. • **Completed** – Participants who completed the survey • **Branched Out** – Participants who were branched out of the survey. This status is available only if branching was designed for the survey. • **Over Quota** – Participants who reached the Over Quota status. This status is available only if the responses quota was set on the on the **Design** or **Collect** tab > **Quotas** side tab. • **Bounced Back** – Participants to whom the invitation was sent, but email did not make it to the participant and bounced back from server or email address. • **Undeliverable** – Participants to whom the invitation was sent, but an immediate notification from the server was received, which can be caused by numerous reasons.

Item	Description
4	If there is at least one invitation created, you can set the pie chart to display campaign statuses based on a certain invitation by clicking the arrow next to the **Participants** link and selecting the needed option from the drop-down menu, for example, **Initial Invitation** or **Second Reminder**. The **Participants** link changes to **Initial Invitation**, **Reminder**, or **Thank You** correspondingly. Clicking this link brings you to the **Manage Participants** page.
5	Switch between the pie chart and table view of the participant statuses. Table view additionally displays the percentage for each participant status and the total number of participants. Clicking a pie slice or a status link in the table takes you to the **Manage Participants** grid with the corresponding filter applied. For example, if you click the pie slice that represents the Invited participant status, you will be redirected to the **Manage Participants** grid where only the participants invited to take the survey are displayed. Also, if you set the pie chart to display participant statuses based on a certain invitation, the **Manage Participants** grid (displayed after clicking a pie slice) will be filtered accordingly (showing only participants invited via First Reminder, for example). On the Manage Participants grid, if the filter dependent on the pie slice or status link is applied, the Filter button on the toolbar is disabled until you clear the current filter.
6	Click the **Schedule** link to go to the **Schedule** page, where you can manage schedule settings for different survey events, such as Open Survey, Send Initial Invitation, Close Survey, and other events. For details, see Schedule page, page 672.
7	Create and manage survey invitations, reminders, and Thank You message by clicking the corresponding link (to go to the invitation designer) and the corresponding button to the right (to send or resend the invitation). You can delete the schedule settings defined for a certain invitation by clicking the delete icon to the rightmost of this invitation. On the Manage Participants grid, if the filter dependent on the pie slice or status link is applied, the Filter button on the toolbar is disabled until you clear the current filter.

Item	Description
8	Click the drop-down menu to select one of the following actions: • **Add Panelists** – Add panelists to be invited to your survey via filtering options (for details, see Add panelists via filtering options, page 665). • **Add Panelists One at a Time** – Add one individual participant to be invited to your survey (for details, see Add panelists one at a time, page 666). • **Advanced Properties** – Disable panelists health score updates for the survey. For details about adding and managing survey participants, see Manage Participants for Invite Panelists, page 664. • **Participant Details** – View a campaign chart and a table with the participant information collected for a campaign. If there are any invitations for the campaign, you can select the needed invitation type from the list and view only the information for this type of invitation. By default, **Overall Campaign** is selected. You can also print or send an email message with the report by clicking the **Print** or **Email** button correspondingly. • **Test** – Test the look and feel of your survey (available only before the survey is opened for the first time). When a survey is opened, all test data is deleted. • **Delete** – Remove the current campaign and return to the **Choose How to Collect Your Survey Results** page (available only before the survey is opened for the first time).

Chapter 8

Write invitations

Topics

Write Invitations

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page.

On the invitation designer page, you can create an email and SMS messages of your invitation, schedule the time when they will be delivered to your survey participants, and preview them.

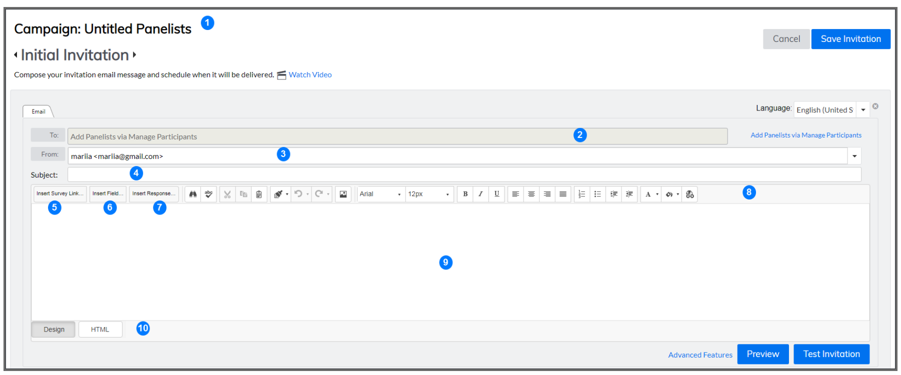
If you want to have the same invitation text for both email and SMS messages, compose one of the messages, and the text will be automatically duplicated to another one. If you want to have two different messages, edit another message correspondingly. For more information about all survey invitations, see Invitations page, page 631.

Email message

You can create an email message of your invitation by using the **Email** tab on the invitation designer page.

For definition of the Email message area, use the following image and table.

For more information, see Compose Initial Invitation, page 623.



The Email tab

Item	Description
1	**Campaign** – Name of the survey campaign that the invitation is associated with. It is displayed only for multiple-campaign surveys.

Item	Description
2	**To** – Add participants by typing a participant's email address directly in the box, or click the **Add Participants/Panelists via Manage Participants** link to navigate to **Manage Participants** where you can add participants or panelists to your survey. You can add multiple email addresses by separating them with commas or semicolons. For more information, see Add invitation recipients, page 620.
3	**From** – The box is filled in automatically using the current user's email address. Other options may be provided in a list as configured by your Survey Administrator.
4	**Subject** – Add a subject line for your email (for example: *Please take my survey*).
5	**Insert Survey Link** – Click to insert the survey link in the invitation, which opens the first page of the survey. If your survey is translated to other languages, you can create survey links to each survey translation by clicking the needed language in the **Languages** list. The created link navigates to the needed survey translation.
6	**Insert Field*** – Double-click any field that you want to insert into the body of your email. The **General** folder contains basic participant/panelist information, including email, survey URL, unsubscribe URL, keys, and close date. Additional folders reference each profile and include each profile question into the body of the invitation (for details, see Insert fields in the invitation, page 624).
7	**Insert Response Link** – Click to insert the survey link, which opens the first survey page with the preselected question (**Choose One** or **Choose One with Image** only). Respondents can change the preselected response or leave it as it is, and then proceed to the next survey questions. Specify the link text, question (from the first survey page only), and the preselected response (for details, see Insert Response Link, page 644). This functionality works in **Modern** survey rendering only. For more information about survey rendering modes, see Survey rendering overview, page 414.
8	**Toolbar** – Click to add formatting options for your email message such as font, bold, underline, find and replace, print, spell check, etc. Hover over each icon to see a tooltip.
9	**Message body** – Type your email message text here.
10	**Design or HTML** – Switch between the Design and HTML modes.

*The **Fields** dialog box contains fields that may be used to insert information into your invitation message from your panel database.

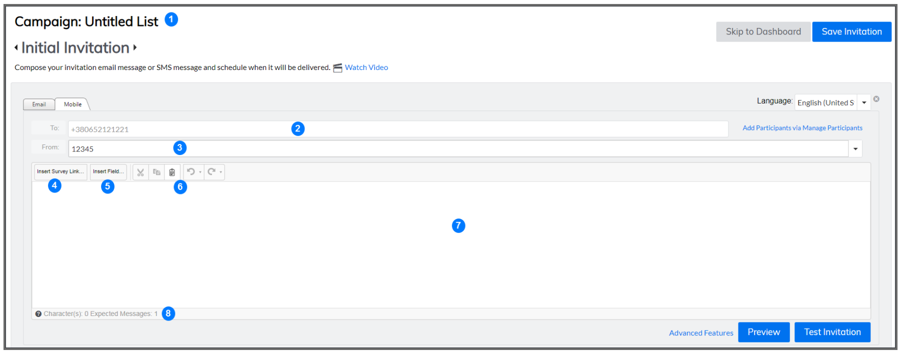
SMS message

You can create an SMS message of your invitation by using the **Mobile** tab on the invitation designer page.

Before you begin

- Ensure that System Administrator activated the SMS license for your workgroup.
- Ensure that Group Administrator configured the **SMS Gateway** settings for your workgroup.

For definition of the SMS message area, use the following image and table.



The Mobile tab

Item	Description
1	**Campaign** – Name of the survey campaign that the invitation is associated with. It is displayed only for multiple-campaign surveys.
2	**To** – Add participants by typing the participant's mobile number directly in the box, or click the **Add Participants/Panelists via Manage Participants** link to navigate to the **Manage Participants** page, where you can add participants to your survey. You can add several mobile numbers by separating them with commas or semicolons. For more information, see Add invitation recipients, page 620.
3	**From** – The box is filled in automatically using the mobile number provided on the **SMS Gateway Settings** page > the **Invitation Originating Number** box.
4	**Insert Survey Link** – Click to insert the survey link in the invitation, which opens the first page of the survey. If your survey is translated to other languages, you can create survey links to each survey translation by clicking the needed language in the **Languages** list. The created link navigates to the needed survey translation.
5	**Insert Field** – Double-click any field that you want to insert into the body of your SMS message. The **General** folder contains basic participant or panelist information, including email, survey URL, unsubscribe URL, keys, and close date. Additional folders reference each profile and include each profile question into the body of the invitation. If a user copies and pastes a placeholder with custom link text from an email invitation into an SMS invitation, the link text is ignored.

Item	Description
6	**Toolbar** – Click to add formatting options and functions for your SMS message such as cut, copy, paste, undo, and redo. Hover over each icon to see a tooltip.
7	**Message body** – Type your SMS message text here.
8	**Character count** – View the number of characters and the number of SMS messages in your invitation. You can send a multi-part SMS invitation that contains up to six messages. If your SMS invitation contains only one message, the maximum number of characters in the message is 70 or 160 depending on character encoding. If your SMS invitation contains two or more messages, the maximum number of characters in one SMS message is 67 or 153 depending on character encoding.

Add invitation recipients

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page.

You can add invitation recipients by typing each recipient's email address or mobile number directly in the **To** box. You can also use the **Add Participants via Manage Participants** link on the **Email** and **Mobile** tabs to add individual participants to your survey or upload a file with a list of participants into the survey.

Procedure

1. On the **Initial Invitation** page, next to the **To** box, click the **Add Participants via Manage Participants** link.
2. On the **Manage Participants** page, add participants that you want to invite to your survey.

   For more details, see Add participants, page 647.
3. To continue composing the invitation, on the **Manage Participants** page, click the **Return to Invitation Designer** button.
4. In the **To** box, the name, email address, or mobile number of the participant (panelist) selected as an invitation recipient appears.

   If both first and last names of the participant (panelist) are specified, they are displayed in the **To** box. The email address or mobile number of the participant (panelist) is displayed in the **To** box if neither first nor last name of the participant (panelist) is specified.
   Multiple recipients appear in the **To** text box separated by commas or semicolons. If the total number of recipients is more than three, they are displayed in the following way: participant 1, participant 2, participant 3...(# More Participants), where # is a counter for all participants who exceed 3.

Add Reply To, CC, BCC, and Subject to the invitation

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page.

You can add email addresses to the **Cc** and **Bcc** boxes and specify a **Reply To** address by using the **To** button in the **Email Message** area.

Procedure

1 On the **Initial Invitation** page, click the **To** button.

2 In the **Invitation Respondents** dialog box, select the **Send to all eligible participants** check box to send an email messages to your campaign participants only, or clear the check box, and in the **To** text box, provide the needed email addresses.

> To enable the **Send to all eligible participants** check box, on the **Mail Setup** side tab, select the **Enable address piping in To field of Invitation** permission.

> Any email address added in the **Invitation Respondents** dialog box will receive all invitations sent to participants. This may cause handling a large volume of email messages.

3 In the **Invitation Respondents** dialog box, provide the email addresses in the corresponding **Cc** and **Bcc** text boxes.

> You can only select one address in the **Reply To** list.

The recipients added to the **Cc** box receive the copy of the invitation. If you add recipients to the **Bcc** box, a copy of the message is sent to them, but their email addresses are not visible to other recipients of the invitation.

Related topics

Delivering invitations

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page.

OR

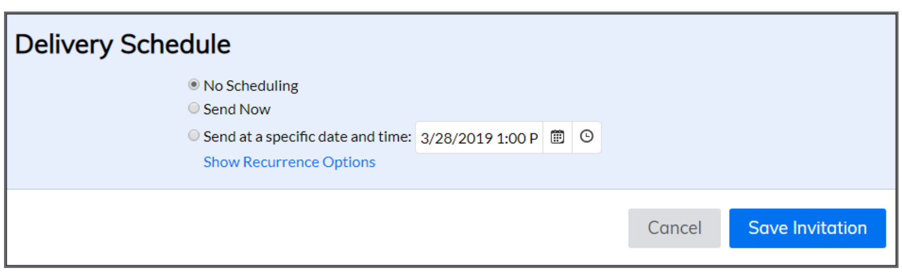
Overview side tab > **Create Invitation** button > **Initial Invitation** page.

In the **Delivery Schedule** area of the **Initial Invitation** page, select the needed options for the delivery of your invitation to the participants.

The following options are available :

- **No Scheduling –** Use this option to send your invitation later. You may want to select it if you have not finished adding participants, writing your invitation message, or have not yet decided when to send the invitation.
- **Send Now –** Use this option to send your invitation immediately. There may be a delay of several minutes before your invitation is delivered to participants.
- **Send at a specific date and time** (using the calendar function) – Use this option to specify a date and time when you want to deliver your invitation. You can either type the date and time manually into the available text field or select the date and time from pop-up menus. Click the **Show Recurrence Options** link to specify recurrence options for your invitation delivery. Use this functionality to send an invitation multiple times on a daily, weekly, or monthly basis. You can also set an end date or select **No End Date**. For more details, see Scheduling invitations delivery, page 674.

If the **Send at a specific date and time** option is selected, the **Save Invitation** button changes to **Save Schedule**, clicking on which saves both the composed email message and schedule settings.



The Delivery Schedule section

To ensure a high level of security and mail delivery reliability, EFM does not support external file attachments to any email messages sent from the application (including survey invitations, reminders, and Thank You messages.) If you need to share a file via EFM email, it is recommended that you place it on an accessible web location and provide a link to the location in the email.

Compose Initial Invitation

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page.

You can compose the email or SMS message of your invitation.

> To compose reminders and a Thank You message, use the same steps.

Procedure

1. On the **Email** or **Mobile** tab, use the **From** list to select an email address or specify a mobile number from which you want to send your invitation.
2. Click the **Add Participants via Manage Participants** link to add participants to your survey.

   For more details, see Manage Participants Overview, page 646.

> To continue composing the invitation, click the **Return to Invitation Designer** button on the **Manage Participants** page.

3. To add the **Cc**, **Bcc**, or **Reply To** email addresses, click the **To** button. Separate email addresses by commas or semicolons.
4. In the **Subject** field, type the invitation subject.
5. In the body of your invitation, type the content of the email or SMS message and customize it by using the editing toolbar.
6. To insert the survey URL into your invitation, click the **Insert Survey Link** or **Insert Response Link** on the toolbar.

   For more details, see Insert Response Link, page 644.
7. To pipe data into your invitation, place the pointer in the body of the message, click the **Insert Field** on the toolbar, and then in the **Fields** dialog box, double-click the needed field.

   For more details, see Insert fields in the invitation, page 624.
8. To test your invitation before delivering it, click the **Test Invitation** button.
9. In the **Test Your Invitation** dialog box, type your email address or mobile number, and then click the **Send** button.

   For more details, see Test invitation, page 627.
10. In the **Delivery Schedule** section, select the appropriate option for your invitation delivery.
11. Click **Save Invitation**.

> The name of the saving button varies depending on the delivery option that you select.

Related topics

Insert fields in the invitation

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Insert Field** button.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page > **Insert Field** button.

You can insert certain fields into the email or SMS invitation that will be populated with the appropriate values from the database upon sending to the specific recipient.

Procedure

1. Place your cursor in the message body where you want to insert a field, and then on the toolbar, click **Insert Field**.
2. In the **Fields** dialog box, double-click the name of the field to be inserted.

   It will be placed in the body of your message at the point of your cursor. When the message is sent, the field will be replaced with the appropriate value from the database.

> For panelists, you can additionally insert respondent location values (specified when adding a panelist) into the invitations: City, State, Country, Zip Code/Postal Code, Address 1, and Address 2.

3. Click the **Preview** button to view how your message will appear before it is sent.

   Email messages can be viewed and sent in HTML or Text format, SMS messages only in Text format.

Advanced Features of invitation

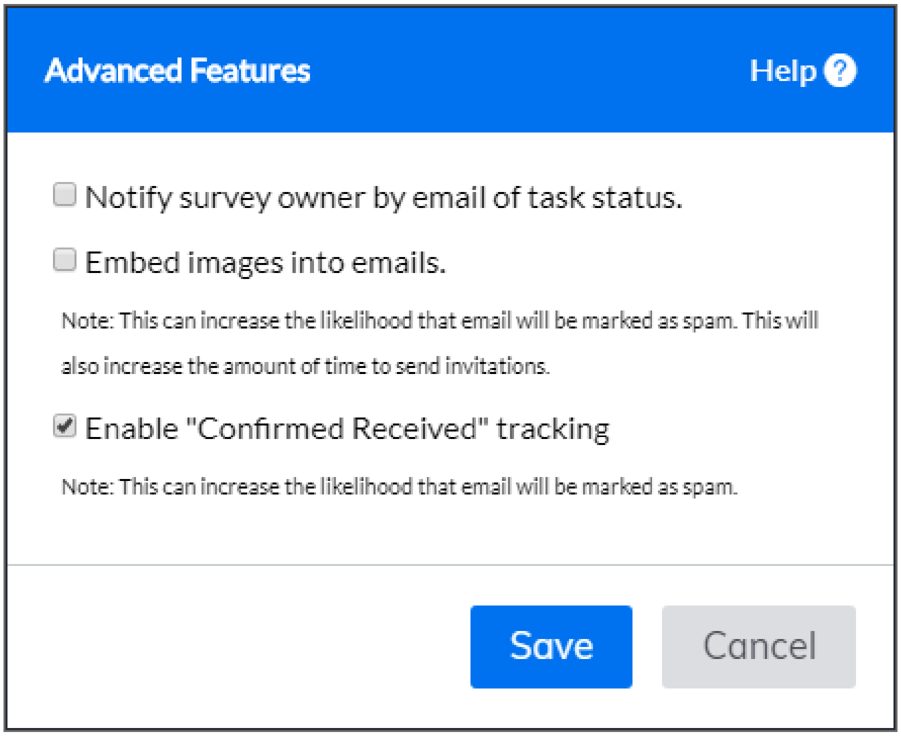
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Advanced Features** link.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page > **Advanced Features** link.

On the **Initial Invitation** page, you can specify the advanced features for your invitation.



The Advanced Features dialog box

In the **Advanced Features** dialog box, the following options are available:

- **Notify survey owner by email of task status** – If selected, the survey owner receives notification of invitation status via email.
- **Embed images into emails** – If selected, you can embed images into the invitation email or link them.

  For more details, see Embed Images into Invitations, page 639.
- **Enable "Confirmed Received" tracking** (selected by default) – If selected, this option provides tracking of the Confirmed Received status for each sent invitation and each participant in your survey (see Participant status, page 584).

  The Confirmed Received status is displayed in the following places in EFM:

  - **Collect** tab > **Invitations** page and invitation mail details dialog box.

- **Manage Participants** page (**Campaign Status** column and invitations status columns).

> To turn on this functionality on a user level, see Mail Preferences, page 1417. To turn on this functionality on a workgroup level, contact your Group Administrator.

- **Use email instead of mobile number if both present** (for Contact List only) – If selected, participants with both email address and mobile number specified, receive an email invitation preferred to SMS invitation. The participant's **Preferred Contact Method** value updates correspondingly.

Test invitation

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Email** or **Mobile** tab > **Test Invitation**.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page > **Email** or **Mobile** tab > **Test Invitation**.

On the **Initial Invitation** page, you can test your invitation by using the **Test Invitation** option on the **Email** and **Mobile** tabs. Use this option to send an email or SMS message to yourself or others to test the look and feel of your invitation before sending the invitation out to your participants.

Procedure

1. After composing your invitation, on the **Email** or **Mobile** tab, click **Test Invitation**.
2. In the **Test Your Invitation** dialog box, type an email address or mobile number to test the email or SMS message correspondingly.
3. Click **Send**.

> If you insert the **Survey Link** box in your test invitation, the URL placeholder for the survey link appears in the test invitation. However, the survey link in the test invitation is not a working survey link.

Previewing invitation

Navigation

Collect tab > select **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Email** or **Mobile** tab > **Preview**.

OR

Overview dashboard > **Create InvitationEmail** or **Mobile** tab > **Preview**.

On the **Initial Invitation** page, you can preview your email or SMS invitation by using the **Preview** option on the **Email** or **Mobile** tabs correspondingly.

In the **Preview** dialog box, you can do the following:

- View the actual email or SMS message of your invitation.

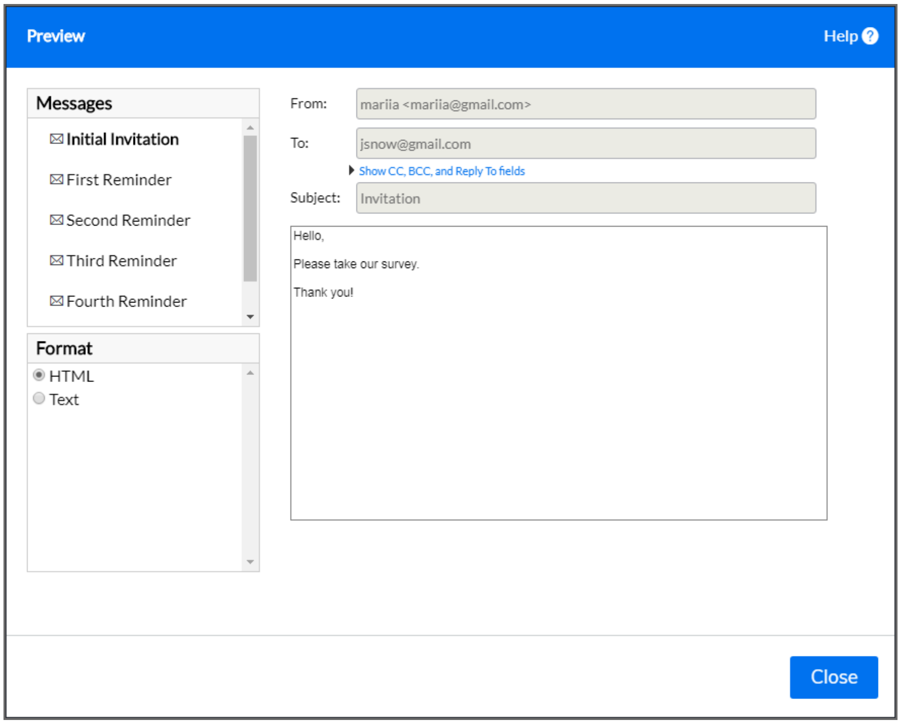
> If participants (panelists) are added to the participant list, participant data will be inserted in place of the **Field** bookmarks.

- For email invitations only, select to view different invitations from the **Messages** area.

> Additional invitations may be inspected by using the arrows at the bottom of the message preview.

- For email invitations only, switch between HTML and Text view of the invitation in the **Format** area.

When invitation preview is completed, click the **Close** button at the bottom of the **Preview** dialog box to return to the invitation designer or scheduler.



The Preview dialog box

Reminders and Thank You message

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Overview** side tab > **Schedule** pane > **Add a Reminder** or **Add Thank You** link.

You can remind the survey participants to take your survey by sending them reminders. You can also thank your survey participants for taking the survey by sending a Thank You message.

You can send up only to four reminders.

You can create a reminder or Thank You message by using one of the following options:

- On the **Overview** side tab, in the **Schedule** section, click the needed link (**Add a reminder** or **Add Thank You**) or click the **Create** button.
- On the **Invitations** side tab, on the **Invitations** page, in the **New** menu, click the needed option (**Reminder** or **Thank You**).

Using either of the described options takes you to the invitation designer, where you can compose and schedule your reminder or Thank You message.

An initial invitation and reminders can only be created in sequential order, which means that you cannot create the second Reminder before the first Reminder.

You can compose, edit, schedule, and send the reminders and Thank You message the same way as survey invitations. To view details about your reminders and Thank You message, see Invitations page, page 631.

The message and subject text of a reminder along with the **From**, **Cc**, **Bcc**, and **Reply To** fields are copied from the previous invitation or reminder into the next ones. The images and translations are copied too.

When you add and schedule a reminder, it appears in the **Schedule** section with the corresponding name (**First Reminder** or **Second Reminder**, for example). Clicking the needed reminder link takes you to the invitation designer, where you can edit this reminder. You can also delete the scheduled settings for the needed reminder or Thank You message by clicking the icon next to the needed message.

Reminders are sent only to the participants who were sent the previous invitation or reminder and have Invited status (see Participant status, page 584). Thank You message is sent only to the participants who completed the survey. If there are no participants that are eligible for the selected reminder or Thank You message, the email will not be sent.

To ensure a high level of security and mail delivery reliability, EFM does not support external file attachments to any email messages sent from the application (including survey invitations, reminders, and 'Thank You' messages.) If you need to share a file via EFM email, it is recommended that you place it on an accessible web location and provide a link to the location in the email.

Invitations page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Overview** page > **Invitations** side tab > **Invitations** page.

On the **Invitations** page, you can view and manage all your invitations (including reminders and a Thank You message) in a single grid.

An initial invitation and reminders can only be created in sequential order, which means that you cannot create the second Reminder before the first Reminder.

The following table describes the details that you can view about each invitation.

Invitation type	Type of the invitation: Initial Invitation, Reminder, or Thank You. You can access the invitation designer by clicking the needed invitation type link.
Campaign	Name of the campaign that the invitation is associated with (for details about multiple campaigns, see Adding multiple campaigns to survey, page 586).
Last modified	Date when the invitation was last modified.
Not Yet Invited	Number of participants to whom the invitation has not been sent yet.
In Queue	Number of invitation email messages that are being sent.
Sent	Number of invitation email messages that are successfully sent.
Confirmed Received	Number of invitation email messages that are received and opened by the participants.
Unsubscribed	Number of invitation email messages that are sent to the participants who unsubscribed from your survey.
Undeliverable	Number of invitation email messages that could not be delivered to the participants.
Bounced Back	Number of invitation email messages that bounced back from the server or email address and could not be delivered to the participants.
Started	Number of surveys that are started after participants received the invitation email message.

Completed		Number of surveys that are completed after participants received the invitation email message.
Status		Status of the invitation: • **Not Scheduled** – The invitation is composed but not scheduled yet. • **Scheduled** – The invitation is scheduled but not sent yet. • **In Progress** – The invitation is being sent. • **Completed** – The invitation is sent successfully to all recipients. • **# Error(s)** – Errors occurred when sending the invitation (Undeliverable or Bounced Back status). • **Failed** – The invitation task failed due to an EFM system error. The email message with the task error details is sent to the survey author. The participant statuses remain unchanged. To see the mail details of the invitation, click its status link (see Invitation mail details, page 634).

The total number of the participants in each row accounts for all participants that are eligible for the current invitation (have Invited status for the previous invitation), except for participants with Over Quota, Branched Out, and Not Eligible statuses. However, you can view the participants with these statuses in the mail details dialog box (see Invitation mail details, page 634).

Participants that have not completed the survey are listed as Not Eligible for the Thank You message.

The numbers in each column change according to the current status of participants. For example, when the invitation is sent to a participant, 1 is added to the **Sent** column; when this participant takes and completes the survey, 1 is added to the **Completed** column, and 1 is subtracted from the **Sent** column.

Actions menu

Use the **Actions** menu on the toolbar to complete the following actions:

- **Version History** – View version history of the selected invitation.

  For more details, see Invitation version history, page 636.
- **Download Details** – Export the **Invitations** grid content to a .csv file.
- **Resend Invitation** – Resend the selected invitation if it was not sent yet or failed to be sent. To make this option available, select a single invitation from the grid.
- **Delete** – Delete the selected invitation. To make this option available, select a single invitation from the grid. You cannot delete the invitation that was already sent at least once.

If you have an Initial Invitation and several reminders, you can delete only the latest reminder that has not been sent yet.

New menu

Use the **New** menu on the toolbar to create the following items:

- **Initial Invitation** – Create an Initial Invitation in the invitation designer. This option is not available if the Initial Invitation already exists.
- **Reminder** – Create a reminder in the invitation designer. This option is not available if the Initial Invitation does not exist or if all four reminders are already created.
- **Thank You** – Create a Thank You message in the invitation designer. This option is not available if the Thank You message already exists.

> Alternatively, you can create the next invitation in the order by simply clicking the **New** button without having to select the needed option from the drop-down menu. It creates an Initial Invitation if no invitations are created yet, First Reminder if an Initial Invitation is created, and so on.

If a survey has multiple campaigns (Email List or Panelist), you can use the **New** menu only after selecting the needed campaign name from the **Campaign** menu at the top-right corner of the page. The **Invitations** grid then shows and handles only the invitations associated with the selected campaign. Also, all new invitations are created only for the selected campaign. **All Campaigns** is selected by default.

Invitation mail details

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Overview** page > **Invitations** side tab > **Invitations** grid > **Status** column.

On the **Invitations** page, you can view the mail details for the specific invitation by clicking the needed link in the **Status** column.

The following statuses appear as links in the **Status** column: **Completed**, **# Errors**, **In Progress**, and **Scheduled**.

> **Scheduled** status appears as a link only if the invitation is already sent to at least one recipient.

Clicking one of the links opens the mail details dialog box for the specific invitation, where you can view the following information about each participant from the current campaign.

Status	Status of the invitation email for the specific participant: The email is scheduled to be sent The email is currently being sent The email was sent There was a problem when sending the email
Contact Info	Email address or mobile number of the participant; depends on the specified **Preferred Contact Method** value (see Add individual participant, page 652).
Date	Date when the invitation was sent to the specific participant or when the most recent campaign status was received.
Campaign Status	Campaign status of the participant: Not Yet Invited, Invited, In Queue, Started, Completed, Sent, Confirmed Received, Unsubscribed, Undeliverable, Bounced Back, Over Quota, Branched Out, or Not Eligible. • Not Eligible status is displayed for the participants who previously completed the survey, were unsubscribed, reached Over Quota status, or branched out from the survey. As a result, these participants cannot be sent the current reminder. • For Undeliverable or Bounced Back statuses, hover over the status to view the details.

Actions	Drop-down menu that allows you to complete the following actions on the selected participant: • **Resend Invitation** – Resend the invitation to the participant. This option is not available for participants with the following statuses: Completed, Branched Out, Over Quota, and Not Eligible. • **Delete Participants** – Delete the participant from the survey.

Invitation version history

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Overview** page > **Invitations** side tab > **Invitations** page > select a single invitation from the grid > **Actions** menu > **Version History**.

With the **Version History** option on the **Invitations** page, you can view information about changes made to the specific invitation.

> You can view the history of the last 20 changes of your invitation.

To view version history, select the needed invitation from the grid, and then in the **Actions** menu, click **Version History**.

> You can delete only a single invitation at a time.

In the **Version History** dialog box, you can view the following information:

- **Version** – Number of the change made to the invitation.
- **Date** – Day and time of the change.
- **User Name** – Name of the user who made the change.
- **Description** – Short summary of the change. The following changes are tracked and displayed in the **Description** column:
  - **Created** – Invitation is created.
  - **Invitation Updated** – Subject or body text of the invitation is changed and saved.
  - **Schedule Updated** – Schedule settings of the invitation are changed.
  - **Header Updated** – **To**, **From**, **Cc**, or **Bcc** field of the invitation is changed and saved.
  - **Properties Updated** – Options in the **Advanced Features** dialog box are changed and saved.
  - **Schedule Updated** – Schedule settings are changed and saved.
  - **Language (Name_OF_Language) Added** – New invitation language is added.
  - **Language (Name_OF_Language) Deleted** – Invitation language is deleted.

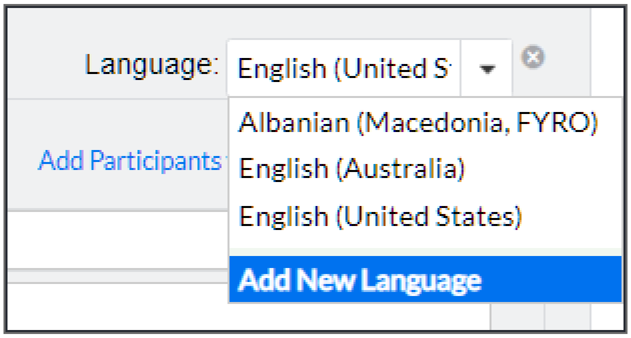
Add invitation language

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Email** or **Mobile** tab > **Language** menu.

You can add a new language, and then set it for your invitations and reminders by using the **Language** menu in the invitation designer.

The invitation can be designed in languages other than your default language. You can view the current invitation language next to the **Language** menu.



The Language menu

Procedure

1. Create a survey, and then go to the **Collect** tab.
2. Select any survey distribution method with closed participation, and then on the **Initial Invitation** page, compose your invitation (see Compose Initial Invitation, page 623).

> The invitation language depends on your default survey language.

3. In the **Language** menu in survey designer, click **Add New Language**.
4. In the **Add New Language** dialog box, select a new language in which you want to create your invitation.
5. Click **OK**. The selected language is added to the **Language** menu.

   Now you can type the email or SMS message in the added language, which will be saved as a separate message for the selected invitation.

   If you send the invitation to the participants of the specific culture, the email or SMS message will display in the corresponding language for them (if this language was previously added to the invitation). For example, if the participant's culture is Arabic, and you added the message in Arabic to the invitation, the participant will automatically see the received invitation in Arabic.
6. To delete the invitation language, select the needed language from the **Language** menu, and then click the delete icon  next to the menu.

You cannot delete the default invitation language, which is set under My Account page, page 1444.

Embed Images into Invitations

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Email** tab > **Advanced Features link**.

OR

Overview side tab >**Create Invitation** button > **Initial Invitation** page > **Email** tab > **Advanced Features link**.

You can choose to embed images into the invitation email by selecting the **Embed images into emails** check box in the **Advanced Features** dialog box.

> By default, the **Embed images into emails** check box is cleared, and images are linked in your invitations.

Embedding images guarantees that all respondents will see your images and also increases the amount of time to send the invitations by up to 6 times. But at the same time it increases the chance that the email will be marked as spam and the respondents may not see the invitations, which can decrease your response rate.

> In the test invitations, images are always embedded.

Procedure

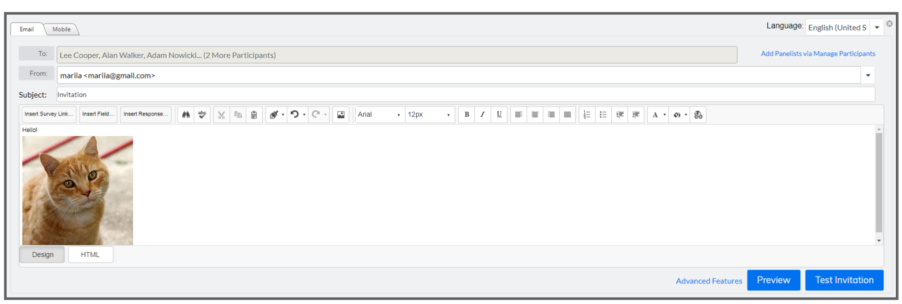
1 On the **Collect** tab, select the **Create a List**, **Invite Panelists**, or **Require a Passcode** distribution method.

2 On the **Initial Invitation** page, compose an invitation message.

For more information, see Compose Initial Invitation, page 623.

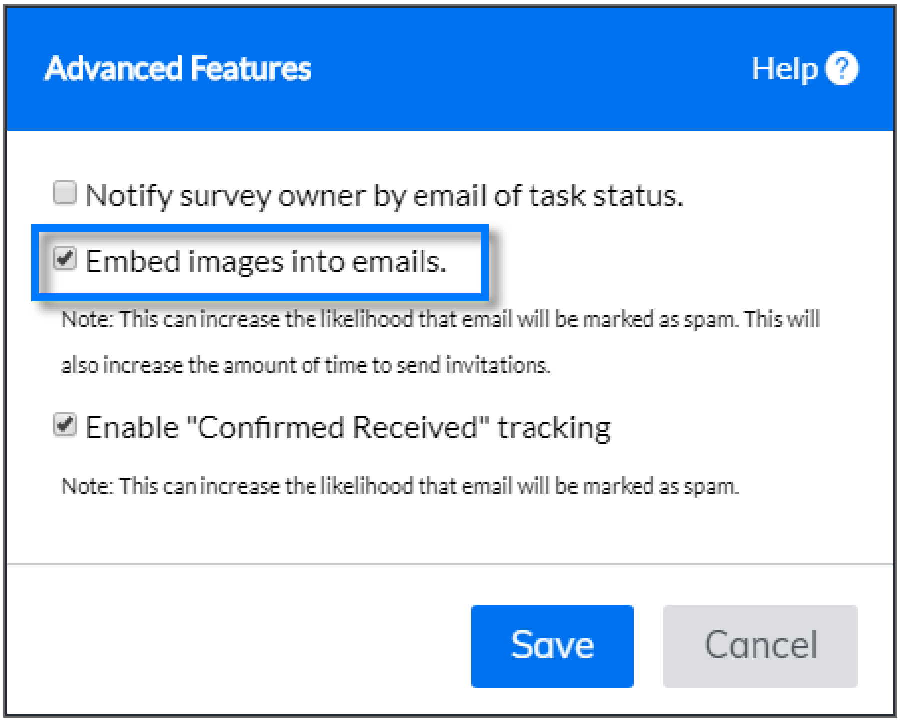
3 On the toolbar, click the icon.

4 In the image manager, select the image, and then click **Insert**.



The image manager

5 Click the **Advanced Features** link, and then select the **Embed images into emails** check box.



The Embed images into emails check box

6 Click **Save**.

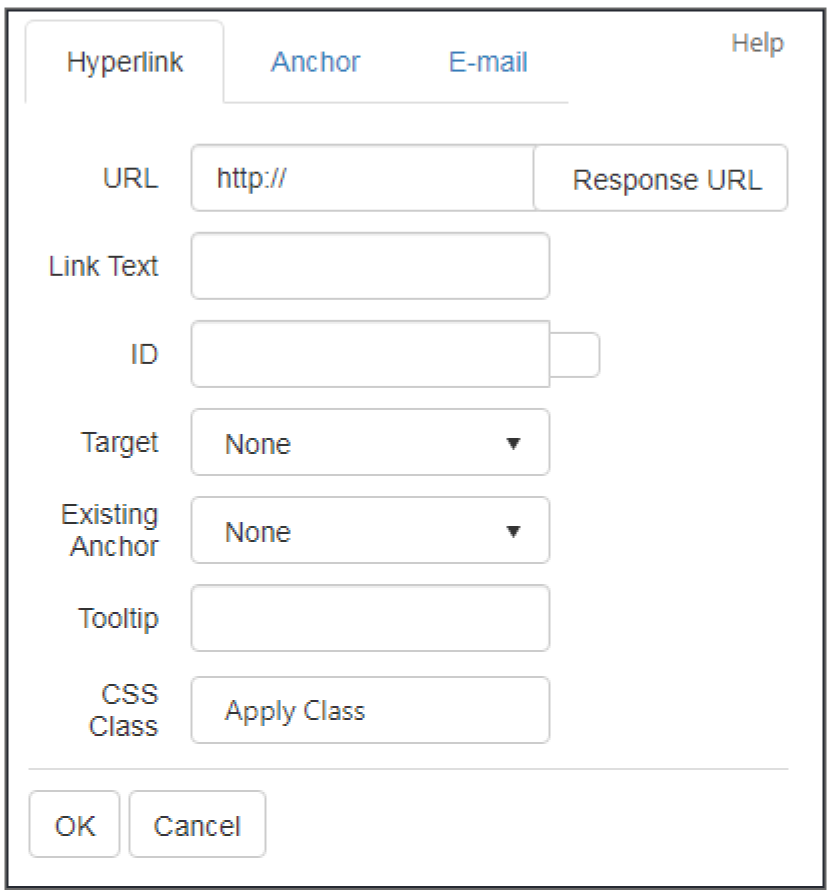
When you send the invitation, the image will be embedded into it.

Hyperlink Manager

With the **Hyperlink Manager**, you can insert a hyperlink in almost any text editor in EFM application. **Hyperlink Manager** is available in the following areas of the application:

- **Expanded Editor** for questions, choices, columns, and text blocks
- **Add Trigger** dialog box
- **Survey Glossary** (by pressing Ctrl+K)
- End page designer (by pressing Ctrl+K)
- **Library** tab: **Add Text Block** dialog box, **Hierarchical Question** designer (by pressing Ctrl+K)
- **Cases** tab: **Create New Case** dialog box (by pressing Ctrl+K)
- Invitation designer for **Initial Invitation**, reminders, and **Thank You** message
- **Schedule Export Delivery Page** on the **Response Manager** page
- **Schedule Report Delivery** on the **Reports** side tab of the **Cases** tab

You can insert three types of hyperlinks: **Hyperlink**, **Anchor**, and **Email**.



The Hyperlink Manager dialog box

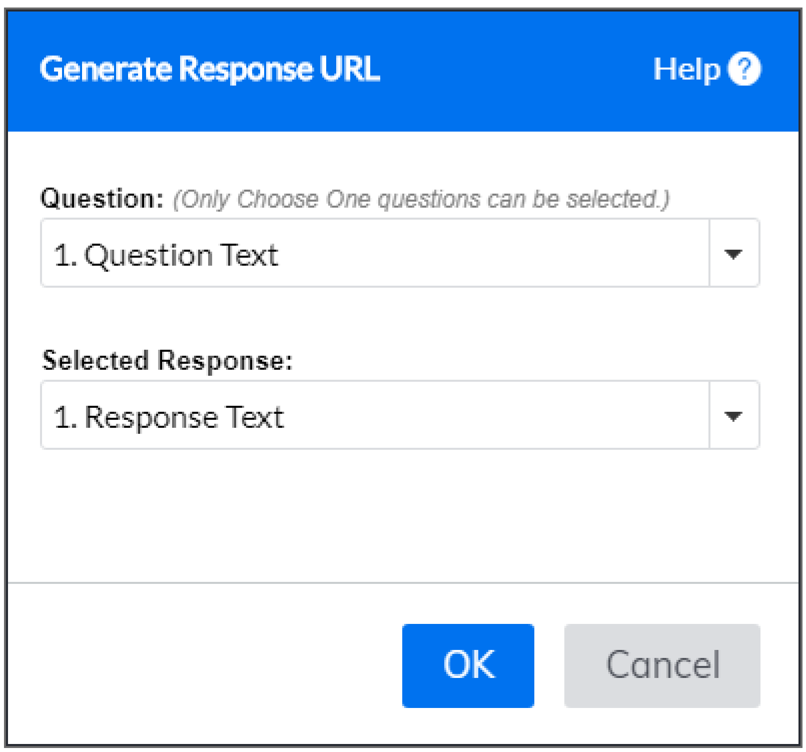
Hyperlink tab

On the **Hyperlink** tab, you can define a link to a URL. You can also link any text element or image to the specified URL. You need to set the following properties:

- **URL** – The URL of the hyperlink.
- **Response URL** – Insert the survey link in the invitation, which opens the first survey page with the preselected response to a **Choose One** or **Choose One with Image** question. Respondents can change the preselected response or leave it as it is, and then proceed to the next survey questions. Specify the link text, question (from the first survey page only), and the preselected response.

You cannot specify hidden questions and choices as preselected.

Response URL option is available only in invitation designer and only in **Modern** survey rendering. For more information about survey rendering modes, see Survey rendering overview, page 414.



The Generate Response URL dialog box

- **Link Text** – Text that appears instead of the URL and works as a link.
- **ID** – The unique ID for an HTML element (the value must be unique within the HTML document).
- **Target** – The way the link opens when clicked. Choose the preset target from the menu or customize your own target.

All preset targets open the link in a new window except for the **Same Window** target.

- **Existing Anchor** – If an anchor is defined, it appears in this menu and populates the URL field.
- **Tooltip** – Text that appears when you hover over the link.
- **CSS Class** – Link formatting. If selected, the link will be formatted according to the class characteristics. The class must be defined in the survey theme. If the class is not defined in the theme, it will be ignored, and the link will have no class formatting.

Anchor tab

On the **Anchor** tab, you can define an anchor to create hyperlinks to a specific location on a page. This provides a convenient way to link to a different point on a long page. You need to set the following properties:

- **ID** – Unique ID for an HTML element (the value must be unique within the HTML document).
- **Name** – Name of the anchor point.

Email tab

On the **Email** tab, you can define a link to an email address. The link will open the default email client with the **To** and **Subject** fields populated as specified on the **Email** tab. You need to set the following properties:

- **Address** – Type a valid email address.
- **Link Text** – Text that appears as the link instead of the email address.
- **Subject** – Text that appears in the **Subject** line of the email message when clicking the link.
- **ID** – Unique ID for an HTML element (the value must be unique within the HTML document).
- **CSS Class** – Link formatting. If selected, the link will be formatted according to the class characteristics. The class must be defined in the survey theme. If the class is not defined in the theme, it will be ignored, and the link will have no class formatting.
- **Tooltip** – The text that appears when you hover over the link.

Insert Response Link

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Collect** tab > **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Email** tab > **Insert Response Link** button.

OR

Overview side tab > **Create Invitation** button > **Initial Invitation** page > **Email** tab > **Insert Response Link** button.

With the **Insert Response Link** feature, you can insert a link to a specified question response in your invitation.

The link will open the first survey page with the preselected response to a **Choose One** or **Choose One with Image** question. Respondents can change the preselected response or leave it as it is, and then proceed to the next survey questions.

> This functionality works in **Modern** survey rendering only. For more information about survey rendering modes, see Survey rendering overview, page 414.

Procedure

1. In the invitation designer, type the question text.
2. On the toolbar, click **Insert Response Link**.

> You can also add a link to a question response by clicking the icon > **Response URL**. For more information, see Hyperlink Manager, page 641.

3. In the **Insert Response Link** dialog box, specify the following:
   a. In the **Link Text** box, type the text of the link that you want to appear in the invitation.
   b. In the **Question** menu, click the question for which you want to select the response.

> You can select only the **Choose One** or **Choose One with Image** question.

   c. In the **Selected Response** menu, click the preselected response.
4. Click **OK**.

Chapter 9

Manage Participants

Topics

Manage Participants Overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or select the needed one (that is not opened yet) > **Collect** tab > click **Create a List** or **Require a Passcode** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link > **Participants** tab > **Manage Participants** page.

You can add participants to your survey, view their contact information and invitation status, import a list of participants into the survey, and export their data into different file formats.

> The **Manage Participants** feature is available only for closed participation distribution methods, such as **Create a List**, **Require a Passcode**, and **Invite Panelists** (see Manage Participants for Invite Panelists, page 664).

Use the following links to navigate quickly to the information that you need:

- Manage Participants grid, page 646
- Add participants, page 647
- Filter participants, page 648
- Delete participants/panelists, page 648
- Set invitation status, page 648
- Export, page 649
- Search, page 649

Manage Participants grid

The **Manage Participants** grid provides you information about each participant that is added to the survey. You can sort survey participants in the grid by clicking the column heading. To change the width of a column, drag its edge.

In addition, you can adjust the number of participants that are displayed in the **Manage Participants** grid by using a toolbar at the bottom of the grid. The default number of participants per page is 10. However, you can select up to 100 participants to be displayed in your grid.

If a survey has multiple campaigns (Contact List or Panelist), you can select the needed campaign name from the **Campaign** list at the upper-right corner of the page. The **Manage Participants** grid then shows and handles only the participants associated with the selected campaign. Also, when adding new participants, they are added to the selected campaign only. **All Campaigns** is selected by default.

The following columns are available in the **Manage Participants** grid by default:

- **Record ID** – Unique record identifier of the participant.
- **Panelist ID** – Unique identifier of the panelist.
- **Email** – Participant's email address.
- **Campaign** – Name of the campaign associated with the participant. This column appears only for multiple-campaign surveys.
- **Started** – Time when the participant first accessed the survey.

- **Completed** – Time when the participant completed the survey.
- **Branched Out** – Time when the participant was branched out of your survey.
- **Over Quota** – Time when the participant reached the over quota limit.
- **Last Modified** – Last time when the participant accessed the survey.
- **Invitation Status** – Last invitation sent to the participant.
- **Campaign Status** – High priority action taken by the participant while answering the survey.
For **Require a Passcode**:
- **Key 1** – The first key the participant uses to access the survey.

> The **Require a Passcode** survey must start with a **Fill in the Blank** question with up to three topics for participants to access the survey. The number of keys in the **Manage Participants** grid depends on the number of topics that you enter in the first **Fill in the Blank** question.

- **Key 2** – The second key the participant uses to access the survey.
- **Key 3** – The third key the participant uses to access the survey.

To add more columns to the grid, click the **Columns** button on the toolbar. For details, see Add a column in Manage Participants, page 669.

To view the detailed information about the participant, click the **Record ID** value in a specific row. You can click the **previous** or **next** link in the **Participant Information** dialog box to browse through the list of participants.

To manage all participants, select the check box in the upper-left part of the **Manage Participants** grid.

Add participants

On the **Manage Participants** page, you can add participants to your survey by using the following **Add** menu options:

- **Email Addresses Only** (For **Create a List** only) – Type the email address of the person that you want to invite to the survey. You can type a list of delimited email addresses directly or copy a list of email addresses into the field. The application supports simple and extended email formats, for example, user@vovici.com and <First name, Last name> user@vovici.com (for details, see Add participants by email addresses, page 650).
- **Mobile Numbers Only** (For **Create a List** only) – Type the mobile number of the participant. You can add several mobile numbers separated by comma or semicolon. For details, see Add participants by mobile numbers, page 651.
- **Add Individual Participant** – Type the email address of the individual participant. You can also optionally provide the culture and keys (1-3) for the individual participant to access the **Require a Passcode** survey. The second and third keys are optional and all of the keys must be entered correctly by the participant to access the survey (for details, see Add individual participant, page 652).
- **Import Participants** – Upload a file with a list of participants into the survey. You can import .csv, .tsv, .xlsx, .txt, and .zip file formats. The first line in a file must contain only identifying headers going from left to right. These headers are used to tell the product what values are assigned to each column in the database when the file is imported. Each participant entry must start on a new line in the file (for details, see Add participants by importing a file, page 654).

When importing participants from a .csv or .xlsx file, remove any extra worksheets from the file.

- **Schedule Import** – Upload participants from a file automatically (for details, see Schedule Participants Import, page 655).

If a survey contains both Email List and Panelist campaigns and the grid is set to show **All Campaigns**, the panelist adding options are also available on the **Add** menu:

- **Add Panelists** – Develop your participants list from your panel workgroup. For details, see Add panelists via filtering options, page 665.
- **Add Panelists One at a Time** – Add each individual panelist at a time. For details, see Add panelists one at a time, page 666.

You can also add participants from the **Email Invitation** window. Any email address typed in the **To** field appears as a separate account on the **Manage Participants** page.

Filter participants

You can apply a custom filter to the **Manage Participants** grid to view the participants who only meet certain criteria. For example, you can filter by participants who have received the First Reminder to take the survey. You can create the filter using the **Filter** button on the **Manage Participants** toolbar. For details, see Filter participants, page 662.

Delete participants/panelists

On the **Manage Participants** page, you can remove participants from your survey. When you delete participants from the **Manage Participants** page, they will no longer be able to access the survey or edit their responses.

On the **Delete** menu, you can do the following:

- **Delete Selected Participants** – Select the check box next to the participants you want to delete from your survey, and then on the **Delete** menu, click **Delete Selected Participant(s)**.
- **Clear Participant Responses** – Select the check box next to the participants you want to target. On the **Delete** menu, click **Clear Participant Responses**. All targeted participant responses associated with the current survey will be removed.

Set invitation status

You can set the invitation status for your participants to resend an initial invitation or a reminder if the respondents have not received it by using the **Set Invitation Status** menu on the toolbar.

The message and subject text of a reminder along with the **From**, **Cc**, **Bcc**, and **Reply To** fields are copied from the previous invitation or reminder into the next one. Images and translations are copied too.

The following options are available in the **Set Invitation Status** menu:

- Not Yet Invited
- Invitation Sent

- First Reminder Sent
- Second Reminder Sent
- Third Reminder Sent
- Fourth Reminder Sent
- Thank You Sent

> To ensure a high level of security and email delivery reliability, EFM does not support external file attachments to any email messages sent from the application (including survey invitations, reminders, and 'Thank You' messages.) If you need to share a file via the EFM email, we recommend that you place it on an accessible web location and provide a link to the location in the email message.

Export

On the **Manage Participants** page, you can export your participants list to different file formats using the following **Export** menu options:

- CSV (Comma delimited)
- TSV (Tab delimited)
- Microsoft Excel
- SPSS

For details, see Export participants list to file, page 660.

Search

Using the **Search** option, you can quickly find the required participant in the **Manage Participants** grid. You can search participants by their email address. For details, see Search for participants, page 661.

Add participants by email addresses

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey or create a new one > **Collect** tab > click **Create a List** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link > **Participants** tab > **Manage Participants** page.

For **Create a List** campaign, you can add participants to your survey by simply typing their email addresses in the **Add Email Addresses** box.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Email Addresses Only**.
2. If your survey contains multiple campaigns of the same type and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participants will be added to the selected campaign only.
3. In the **Add Email Addresses** dialog box, type the email addresses of your survey participants separated by commas or semicolons.
4. Click **Add Participants**.

The added participants appear in the **Manage Participants** grid. The **Preferred Contact Method** column displays **Email** for these participants (to add columns in the **Manage Participants** grid, see Add a column in Manage Participants, page 669).

Add participants by mobile numbers

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey or create a new one > **Collect** tab > click **Create a List** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link > **Participants** tab > **Manage Participants** page.

You can add participants to the Contact List campaign of your survey by typing their mobile numbers in the **Add Mobile Numbers** box.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Mobile Numbers Only**.
2. If your survey contains multiple campaigns of the same type, and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participants will be added to the selected campaign only.
3. In the **Add Mobile Numbers** dialog box, type the mobile numbers of your survey participants separated by commas or semicolons.
4. Click **Add Participants**.

The added participants appear in the **Manage Participants** grid. The **Preferred Contact Method** column displays **Mobile Number** for these participants (to add columns in the **Manage Participants** grid, see Add a column in Manage Participants, page 669).

Add individual participant

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey or create a new one > **Collect** tab > click **Create a List** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link > **Participants** tab > **Manage Participants** page.

You can add an individual participant to your survey by using the **Add Individual Participant** option on the **Manage Participants** page.

Procedure

1 On the **Manage Participants** page, in the **Add** menu, click **Add Individual Participant**.

2 If your survey contains multiple campaigns of the same type, and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participants are added to the selected campaign only.

3 In the **Add Individual Participant** dialog box, type the email address or mobile number of the participant in the **Email** or **Mobile Number** boxes correspondingly.

   You are required to provide at least one contact method. You can view the specified contact method information (**Email** or **Mobile Number**) in the **Preferred Contact Method** column on the **Manage Participants** page for Contact List and Panelist campaigns.

> If your survey contains both Contact List and Panelist campaigns, to view the **Preferred Contact Method** column for the two campaigns, just select it either from **Respondent Fields** or **Panelists** folders. However, to hide this column, you need to clear it in both **Respondent Fields** and **Panelists** folders.

   If both email and mobile number are provided for a participant, you can specify which contact method to use for sending a specific invitation in the **Advanced Features** of the invitation (Advanced Features of invitation, page 625). The **Preferred Contact Method** column displays **Invitation Preference** for this participant.

> **Mobile Number** box is displayed in the **Add Individual Participant** dialog box only if the SMS feature is configured for your workgroup by System Administrator.

4 For **Require a Passcode** distribution method, define the keys in the provided fields to enable participants to access the survey.

5 For **Create a List** distribution method, click the **Optional Fields** link to do the following:

- Define keys in the provided fields to enable adding participants with the same email address. If you define keys for the participant, you can enter the email address that is already in use by another participant. The survey URLs for these participants are different and different records are created for them.
- Select the participant's culture in the **Culture** menu (also available for **Require a Passcode**).

6 Click **Add Participant**.

The added participant appears in the **Manage Participants** grid. The **Preferred Contact Method** column displays **Email** or **Mobile Number** correspondingly.

To add columns in the **Manage Participants** grid, see Add a column in Manage Participants, page 669.

Add participants by importing a file

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey or create a new one > **Collect** tab > click **Create a List** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link > **Participants** tab > **Manage Participants** page.

You can import a list of participants with the corresponding fields from a file without having to manually add each individual participant.

For Email List and Require a Passcode campaigns, you can also preload participants' responses to the questions that are available in your survey. When participants that are associated with these responses access the survey, the responses are preselected. The participants can edit the preselected responses or leave them as they are, and proceed to other questions.

> You can preload participants' responses only if the survey is open.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Import Participants.**
2. If your survey contains multiple campaigns of the same type and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participant will be added to the selected campaign only.
3. In the **Import Participants** dialog box, click **Choose File** to navigate to the file that you want to upload. You can import .csv, .tsv, .xlsx, .txt, and .zip file formats.

> All times must be imported in UTC time. When you upload them, they appear in the default time zone set on the **My Account** tab.

4. Select the file, and then click **Next**.
5. In the **Map Fields** dialog box, map the imported columns to the corresponding respondent fields, and then click **Next**.

> Preloaded participants' responses are available in the **Map Fields** dialog box only if the survey is open.

6. Click **Import**.

The imported participants' fields and preloaded data now appear in the **Manage Participants** grid.

Schedule Participants Import

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > select the needed survey or create a new one > **Collect** tab > click **Create a List** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can schedule to import participants from a file automatically.

> The automatic participants' import is available for the Create a List and Require a Passcode campaigns.

In addition, you can preload participants' responses to the questions that are available in your survey. When participants that are associated with these responses access the survey, the responses are preselected. The participants can edit the preselected responses or leave them as they are, and proceed to other questions.

> You can preload participants' responses only if the survey is open.

During import, all files (if a wild card is used) that match the file name are picked up according to the schedule set by you. Each row in the imported files is imported into the participant list based on the defined mapping. After the successful import, the files are renamed. The file is renamed to {existing file name} -yyyy-mm-dd-hh-mm.bak. The date is the current time that the file is imported.

Procedure

1. On the **Manage Participants** page, on the **Add** menu, click **Schedule Import**.
2. If your survey contains multiple campaigns of the same type, and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participant will be added to the selected campaign only.
3. In the **Schedule Import** dialog box, click **Choose File** to navigate to the file that you want to import. You can import .csv, .tsv, .xlsx, .txt, and .zip file formats.
4. Select the file, and then click **Open**.
5. On the **Map Import** tab, map the imported columns to the corresponding respondent fields, and then click **Next**.

> Preloaded participants' responses are available on the **Map Import** tab only if the survey is open.

6. On the **Import Settings** tab, on the **Import Method** menu, select whether you want to import the file with participants from the SFTP site or the EFM folder. The EFM folder path for participants import is {EFMinstall}AppData\{groupID}\import.

> For the **EFM Folder** option, you need to specify only the file name.

7. In the **Server Name** text box, type the name of the server where the file to import is located.

> The port number in the **Port** text box is fixed at **22** and is not changeable.

8 In the **Path** text box, type the path to the import file.

9 In the **File Name** text box, type the name of the file to import.

> The file name supports a wild card character (*) that allows using a dynamic file name. For example, survey1234participantsdate*.csv (all files that start with "survey1234participantsdate" and end with ".csv").

10 In the **User Name** and **Password** text boxes, type the user name and password to access the server.

11 To allow sending a survey to the same participant multiple times, select the **Allow duplicate emails in imported file(s)** check box.

> Email address is used to check for the duplicates.

12 To import new or existing participants that did not receive invitations within the specified period, select the **Only import participants who have not been emailed in the past [ ] days** check box, and then enter the number of days in the text box.

> If you select both **Allow duplicate emails in imported file(s)** and **Only import participants who have not been emailed in the past [ ] days** check boxes, in this case, the preload data will not be updated.

13 To test the SFTP connection, click **Test**.

14 Click **Next**.

15 On the **Import Frequency** tab, select the option for the frequency of the file import. The following options are available:

- **Not Scheduled** – Select this option to import the file later.
- **Import Now** – Select this option to import the file immediately.
- **Import participants at a specific date and time** – Select this option to import the file at a date and time of your choosing. You can enter a date and time manually or select a date and time by clicking the respective icons. Select a valid start date and time, otherwise the file will not be imported.
- **Show Recurrence Options** – Select this option to import the file multiple times for a set or infinite period. You can set your import to occur every 15 minutes, hourly, daily, weekly, or monthly. In addition, you can set an end date or select no end date.

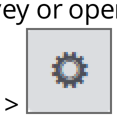
16 To send a status email with the results of the import transaction, select the **Notify survey owner by email of import status** check box.

17 Click **Finish**.

> You can use the **Back** button to go back to the previous tab. After the initial setup is configured, you can navigate between the tabs by clicking the tab name.

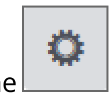
View participant details

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Collect** tab > click the needed distribution method > **Overview** dashboard >  menu > **Participant Details** option.

You can view a campaign chart and a table with the participant information collected for a particular campaign. You can also print or send an email message with the participant information report. For **Contact List**, **Panelist**, and **Require a Passcode** campaigns, if there are any invitations, you can select the needed invitation type from the list and view information for this type of invitation.

Procedure

1. On the **Collect** tab, click the **Overview** tab.
2. In the needed campaign widget, click the  menu, and then click **Participant Details**.
3. To view information for a particular type of invitation, select it from the list.
   By default, **Overall Campaign** is selected.
4. To print or send a report by email, click the **Print** or **Email** button correspondingly.

Delete participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > **Add Participants via Manage Participants** link.

You can delete the selected participants from the **Manage Participants** grid. If you delete a participant, all data related to the participant including responses will be deleted.

> The deleted participant has no access to the survey.

Procedure

1 On the **Manage Participants** page, select the check box next to the participant that you want to delete.

2 On the **Delete** menu, on the toolbar, click one of the following options:

- **Delete Selected Participant(s)** – Delete the selected participant(s).
- **Delete from Panel** – Delete the panelist, and, if needed, delete the participants.
- **Clear Participant Responses** – Delete the selected participant responses that are associated with the current survey.

3 In the confirmation dialog box, click the **Delete Participant(s)**, **Delete**, or **Clear** button correspondingly.

Set Invitation Status

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can set the invitation status for a specific participant. You can use this option if you do not want to send certain invitations (including Reminders and Thank You message) to some participants. For example, if you set the **Second Reminder Sent** status for a participant, this participant will not receive Second Reminder and all the previous invitations: Initial Invitation, First Reminder, and Second Reminder.

Procedure

1. On the **Manage Participants** page, select the check box next to the participant that you want to set the invitation status for.
   You can select multiple participants at a time.
2. On the **Set Invitation Status** menu, click the needed invitation status.
3. In the **Set Invitation Status** dialog box, set time and date of the selected invitation status, and then click **OK**.

The selected invitation status appears in the **Invitation Status** column.

Export participants list to file

Navigation

Design & Collect tab > **Surveys** side tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can export a list of participants into a file.

Procedure

1 On the **Manage Participants** page, on the **Export** menu, click the appropriate file format. The available options are .csv, .tsv, .xlsx, and spss.

The export file is generated in the selected format.

> Time stamps are exported in UTC time.

2 To save or open the file, click the link that appears in the **Export Participants** dialog box.

Search for participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can search for participants by their email address by using the **Search** box.

Procedure

1 On the **Manage Participants** page, type a partial or whole email address in the **Search** box.

2 Click the **Search** icon .
The participants that match your input are displayed in the grid.

Filter participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can filter participants by the custom filter criteria.

Procedure

1. On the **Manage Participants** page, click the **Filter** button.
2. In the **Filter** dialog box, click the **Add** button or the **Add Filter Criteria** link.
3. In the **Add Filter Criteria** dialog box, in the **Source** list, click the source data for your filter: **Participant Information**, **Respondent System Information**, or **Respondent Location**. For details about respondent location data, see Properties, page 482.
4. In the corresponding lists, click the field, expression, and value by which you want to filter participants. For example, to filter participants who have received an initial invitation, select **Initial Invitation Status = Sent**.
5. Click the **Add** button.
   The new filter appears in the **Filter** dialog box.
6. Click the **Apply Filter** button.

The **Manage Participants** grid now displays participants who meet the **Initial Invitation Status = Sent** criteria.

> To edit the filter, click the **edit** link. To remove the filter, click the **clear** link.

Filter participants by organization

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can filter participants by the organization that they belong to.

Procedure

1. In the **Manage Participants** grid, click the **Filter** button.
2. In the **Filter** dialog box, click the **Add** button to add a new filter.
3. On the **Source** menu, click **Participant Information**.
4. On the **Field** menu, click **Organization**.
5. Use the **Expression** and **Value** menus to specify the organization that you want to use for or exclude from filtering.
6. Click the **Add** button to save the filter criteria.
   The created filter is displayed in the **Filter** dialog box.
7. Click the **Apply Filter** button to filter participants according to the created criteria.

Manage Participants for Invite Panelists

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click **Add Panelists via Manage Participants** link.

You can invite the panelists from your panel workgroup to take your survey.

Select the panelists from the available workgroup by clicking the **Add Panelists via Manage Participants** link. Once you click this link, the **Manage Participants** page opens. There are numerous filtering options available from the **Add Panelists** dialog box. Use filtering to target a specific group of panelists who meet your survey criteria or add your participants one at a time searching by first name, last name, or email.

Add panelists via filtering options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can use several filtering options available in the **Add Panelists** dialog box to help you develop your participant list from your panel workgroup.

Typically, only a subset of your panelists is used as participants for your survey.

Procedure

1 On the **Manage Participants** page, on the **Add Panelists** menu, click **Add Panelists**.

2 If your survey contains multiple campaigns of the same type and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participant will be added to the selected campaign only.

3 In the **Add Panelists** dialog box, select one of the following options to define your participant list:

- **Limit Number of Panelists to** – Limit the number of Panelists in your survey based on a number you specify.
- **Apply Saved Filter** – Select filters you previously set up on the **Panel** > **Filters** tab.
- **Add Filter Criteria** – Define filter criteria for your panelists.
- **Filter by Activity** (expand **Activity** section) – Define participant list by filtering panelist activities. For example, you can add to the participant list all panelists that had their invitations sent 3 days ago or the panelists that have never been sent an invitation.
- **Filter using Advanced options** (expand **Advanced** section) – Select participants according to the panelist's original source (how they were added to the panel) or how many days the panelist has been a member of the Panel workgroup.

Add panelists one at a time

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can add each individual panelist at a time.

Procedure

1. On the **Manage Participants** page, on the **Add Panelists** menu, click **Add Panelists One at a Time**.
2. If your survey contains multiple campaigns of the same type and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participant will be added to the selected campaign only.
3. In the **Find Using** dialog box, type the panelist's first name, last name, or email address in the corresponding boxes, and then click **Find**.
   The names of the panelists that meet the search criteria appear in the **Panelists** box. You can use one or all of these fields to find the needed panelist.

> Select the **Exact Matches Only** check box if you want the search to return only names that exactly match the information you entered. For example, if you don't select the **Exact Matches Only** check box and enter the name John, the search might return Johnson as well as John.

4. To add the found panelists to the participant list, click **Add**.
   To conduct another search, click **Close**.

Add the same panelist multiple times

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can add the same panelist multiple times to the survey participant list by using key identifiers in the **Add Panelists** or **Add Panelists one at a time** options.

Typically, panelists are asked to take a survey only once, however, in some cases you may want to send the same survey out to the same panelists more than once (for example, a quarterly employee satisfaction survey). To do this, you need to provide a key identifier each time you send the same survey out to the same panelists. For example, you may have an employee satisfaction survey that you send out quarterly and you might designate the key identifiers as follows:

- The first time you send out the survey: Key 1 = Q1 and Key 2 = 2010
- The second time you send out the survey: Key 1 = Q2 and Key 2 = 2010

To further clarify, at the end of Q1 2010, you send out an employee satisfaction survey to all of your employees to gather information (employees = panelists). At the end of Q2 2010, you send out the same employee satisfaction survey to all of your employees, but in this instance you need to add a key identifier because your employees have already answered this survey in Q1 2010. The product only allows a panelist to reply once to a survey. If you try to resend the same survey to the same panelists, you will receive an alert that you have already added these panelists or they have already received this survey. By using the key identifiers, you can resend the same survey to the same group of panelists because you are associating the panelists with a key reference (for example, Q1 2010).

> The keys can be used for any purpose desired by the user but must be populated in order to allow a panelist to access a survey more than once. You can also use key identifiers in Course Evaluation (for details, see Course evaluation, page 668).

Procedure

1. Add panelists by clicking the **Add Panelists** or **Add Panelists one at a time** option.
2. If your survey contains multiple campaigns of the same type and the grid is set to show **All Campaigns**, in the **Add to this campaign** list, select the needed campaign. The participant will be added to the selected campaign only.
3. Configure key identifiers in one of the following ways:
   - If the **Add Panelists** option is selected:
   a. In the **Add Panelists** dialog box, select the **Configure User Keys** check box, and then click **Next**.
   b. Type the key identifiers in the corresponding **Key** fields, and then click **Next**.
   - If the **Add Panelists one at a time** option is selected:
   a. In the **Find Using** dialog box, type the key identifiers in the corresponding **Key** fields.
4. Click **Add**.

The added panelists are now associated with the corresponding key identifiers, and the panelists can take the same survey again.

Course evaluation

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > click **Create a List**, **Require a Passcode**, or **Invite Panelists** > **Initial Invitation** page > click the **Add Participants via Manage Participants** link.

You can use key identifiers defined through the **Add Panelists** or **Add Panelists one at a time** option for course evaluation.

For example, you want your students to evaluate a course each time it is completed. You use the same survey, but they are evaluating a different course. In the example provided below, Key 1 = course name, Key 2 = professor, and Key 3 = semester and year.

A Panelist with an External ID of 34GDRT3 (in this panel, it's the Student ID number). The first time this panelist is added, the following keys are assigned:

- Key 1: English Literature 101
- Key 2: Professor Leyland
- Key 3: Winter 2005

If another panelist with an External ID of 25FGDF8 is added at the same time, they will also receive:

- Key 1: English Literature 101
- Key 2: Professor Leyland
- Key 3: Winter 2005

To add different key information for panelist 34GDRT3, specify the following keys, and then click **Add** again:

- Key 1: English Literature 101
- Key 2: Professor Fowler
- Key 3: Spring 2005

Key 1 is the same in this round of imports, but Key 2 and Key 3 are different. Only one of the keys needs to be different to add the Panelist more than once, as all of the keys specified are verified in order to allow access. In this example, only External ID of 34GDRT3 is added twice. Panelist 25FGDF8 can only access the survey one time, but Panelist 34GDRT3 can access the survey twice.

Add a column in Manage Participants

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Columns** button.

You can specify which columns you want to display in the **Manage Participants** grid. Also, you can export the columns and filter on them.

You can add fields from the following folders as columns:

- **Respondent Fields**
- **Respondent System Information**
- **Respondent Location**

> **Respondent System Information**, **Respondent Location**, and some of the **Respondent Fields** data are available only if the **Track Respondent Information** check box is selected on the **Properties** tab in survey designer. For more information, see Properties, page 482.

For the **Invite Panelists** survey, you can also add the panelists and profiles information as columns. However, for surveys with multiple campaign types, the **Profiles** folder is unavailable.

Procedure

1. On the **Manage Participants** page, click the **Columns** button.
2. In the **Select Columns** dialog box, click the arrow next to the needed folder to expand it.
3. Select the check box next to the fields that you want to add.
4. Click **Apply**.

The added columns are now displayed in the **Manage Participants** grid. You can export the columns and filter on them.

Participant source reference

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Collect** tab > **Participants** tab > **Manage Participants** page > **Columns** button.

You can associate the participants added to your survey with the corresponding task to better understand the success of your campaigns.

The following columns can be added to the **Manage Participants** grid and to the **Responses** grid:

- **Source Type** – Shows the type of source used to add participants, for example, manual entry, file, Web Service, active directory, survey, and so on.

> The **Source Type** value is applicable to all participants added to the survey irrespective of the way you added them.

- **Task ID** – Shows the unique ID number of the task.
- **Occurrence** – Shows the number of the task occurrences.

> You can also use the **Source Type**, **Task ID**, and **Occurrence** values as criteria to filter participants or responses.

Chapter 10

Scheduling

Topics

Schedule page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > select the needed survey > **Collect** tab > click the **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > click **Skip to Dashboard** > **Overview** tab > **Schedule** link.

You can view and manage schedule settings of the survey and invitation tasks, such as **Open Survey**, **Close Survey**, **Send Initial Invitation**, and other tasks. Survey tasks and invitation tasks are presented in two separate grids with the corresponding headings.

If a survey has multiple campaigns (Email List or Panelist), you can select the needed campaign name from the **Campaign** list at the top-right corner of the page. The **Schedule** grid then shows and handles only the tasks associated with the selected campaign. The **All Campaigns** option is selected by default.

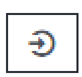
You can schedule survey tasks in the Standard or Transactional mode. By default, the **Schedule** page opens in the Standard mode. To switch between the modes, from the **Schedule using** list at the top-right corner of the page, select the needed option.

When switching between the schedule modes, all existing scheduled tasks are removed.

Standard mode

With the Standard mode, you can schedule each survey tasks separately without any dependencies between the tasks. Just select the task in the grid, and then click one of the following buttons on the toolbar to complete the needed action:

- **Edit** – Open the **Edit Task** dialog box, where you can do the following:
  - Set the task start date – In the **Task** section, type the start date and time in the box.
  - Set the task recurrence options – In the **Recurrence** section, set the task to occur multiple times for a set or infinite period of time. You can set the task to occur daily, weekly, or monthly. In addition, you can specify an end date or select the **No End Date** option.
  - Set the task advanced options – In the **Advanced** section, set to notify the survey owner of the task status. For reminders, in the **Advanced** section, you can additionally select the following options:
    - Send reminders to the participants who have begun but not yet competed the survey.
    - Send reminders to the participants who have not received a prior invitation to this survey in the specified number of days.
- **Remove** – Remove the schedule settings of the task.The task status changes to **Removed**.
- **History** – View the task history.

To perform a task immediately, click the  icon in the **New** column.

Transactional mode

With the Transactional mode, you can schedule sending of invitations to occur over a specified period of time based on the date when the participant was provided access to the survey by being added via **Manage Participants**.

For Open survey and Close survey tasks, scheduling in the Transactional mode works the same way as in the Standard mode.
To perform Open survey or Close Survey task immediately and override the transaction timing, select the task from the grid, and then click **Execute Now** on the toolbar.

To schedule sending of an invitation in Transactional mode, select the needed task in the grid, and then click **Schedule** on the toolbar. In the **Schedule** dialog box, you can set the time when each of the invitations is sent by clicking one of the following options in the corresponding menu:

- **Not Scheduled** (default) – Send the invitation later.
- **As Soon As Possible** – Send the invitation as soon as possible after the Access Granted date. This option is available only for the Initial Invitation and Thank You message.
- **After Set Period** – Send the invitation after the specified period of time, which is calculated based on the Access Granted date.
- **Access Never Revoked** – The access to the survey is never canceled.

Tips

- You can make changes to any triggered task if the task has not occurred yet.
- While using Transactional mode, you still have the option to close a survey. This will cancel the process and pending reminders will not be sent. Thank You messages will not be sent, because the process is terminated; however, you can manually send the Thank You message.

Example:

On the following image, the sending of invitations is scheduled as follows:

- The Initial Invitation is scheduled to be sent as soon as possible after the Access Granted date.
- The First Reminder is scheduled to be sent at 12:45 A.M., two days after the Access Granted date.
- The Second Reminder is scheduled to be sent at 12:45 P.M., three days after the Access Granted date.

Scheduling invitations delivery

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > select the needed survey > **Collect** tab > click the **Create a List**, **Require a Passcode**, or **Invite Panelists** distribution method > **Initial Invitation** page > **Delivery Schedule** area.

You can specify when your invitation will be sent by using the **Delivery Schedule** options in the invitation designer.

An invitation cannot be sent if the status of the survey is **Closed**.

You can schedule your invitations by using three different methods:

- **No Scheduling** – Send your invitation later. Select this option if you have not finished adding participants, writing your invitation message, or have not yet decided when to send the invitation.
- **Send Now** – Send your invitation immediately. To send your invitation, click the **Send Invitation Now** button and in the pop-up dialog box, click the **Send Now** button. There may be a delay of several minutes before your invitation is delivered to participants.
- **Send at a specific date and time** – Specify the date and time when you want to send your invitation. You can either type the date and time manually in the available box or select the date and time from the pop-up menus. Click the and icons correspondingly to select date and time to send your invitation. You can adjust invitation delivery settings on the **Schedule** page (for details, see Schedule page, page 672).
- **Show Recurrence Options** – Send your invitation multiple times for a set or infinite period of time. You can set your invitation to be sent daily, weekly, or monthly. In addition, you can specify an end date or select the **No End Date** option.

To save your **Delivery Schedule** settings and invitation, click the **Save Schedule** button. If you do not want to save changes to your invitation, including the **Delivery Schedule**, click **Skip to Dashboard**, and then click the **Continue without Saving** button.

Survey schedule options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > select the needed survey > **Collect** tab > click the **Generate Link** distribution method > click **Schedule the Survey**.

With the **Schedule the Survey** option, for the **Generate Link** distribution method, you can schedule survey open and close dates and set the recurrence options for these tasks. For example, you can set your survey to open and close every 15 days for two months.

On the **Schedule the Survey** page, you can select the following scheduling options:

- **Open Now** (default) – Open the survey now. Survey status is set to Opened on the **Overview** dashboard.
- **Open the survey at a specific date and time** – Open the survey at the date and time of your choosing. You can enter the date and time manually or select them by clicking the corresponding and icons.
- **Show Recurrence Options** – Open the survey multiple times for a set or infinite period of time. You can set your survey not to open or open daily, weekly, or monthly. In addition, you can set an end date or select the **No End Date** option.
- **Do not open survey** – Save the survey schedule options, navigate to the **Overview** dashboard, and set your survey status to Not Yet Opened.
- **Do not close survey** – Let the survey remain open.
- **Close the survey at a specific date and time** – Close the survey at the date and time of your choosing. You can enter the date and time manually or select them by clicking the corresponding and icons.

> You can schedule the automatic survey closure period for all your surveys on the **Configuration** tab > **Data Policies** tab > **Surveys** tab > **Option** section.

- **Show Recurrence Options** – Close the survey multiple times for a set or infinite period of time. You can set your survey not to close or close daily, weekly, or monthly. In addition, you can specify an end date or select the **No End Date** option.

Chapter 11

How to Create a Report

Topics

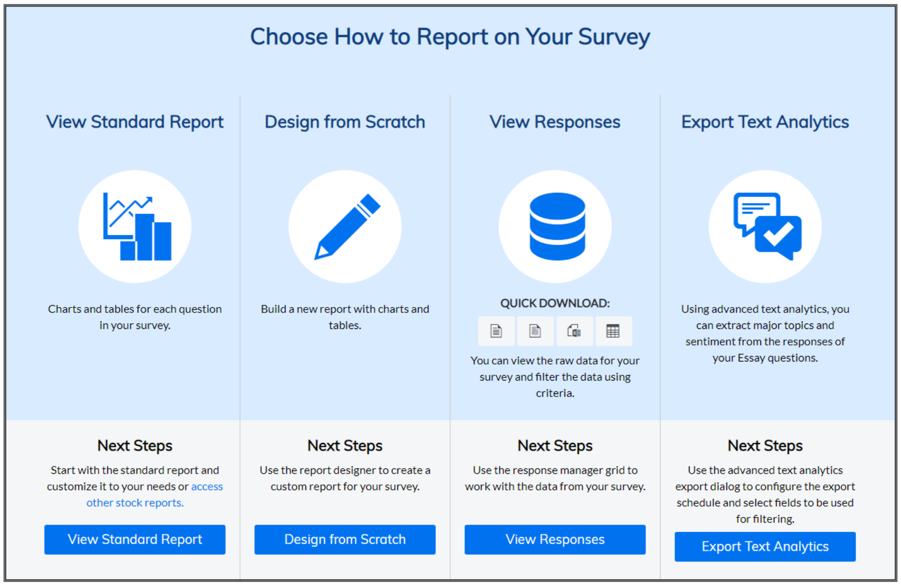
Report landing page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > report landing page.

You can create your own custom report from scratch, view the report responses, and save the report data in different file formats.

When you create the first report on the survey, the report landing page opens.



The report landing page

On the report landing page, the following options are available:

- **View Standard Report** – You can open the standard report with charts and tables for each survey question in the report designer and customize it to your needs or access other stock reports.
- **Design from Scratch** – You can open the report designer and create a custom report with charts and tables for each survey question.
- **View Responses** – You can open the **Response Manager** page where you can view, edit, filter, and export the survey responses to different file formats. To save the report data directly in CSV, TSV, Microsoft Excel, or SPSS format, click the **Quick Download** option. To download the data, click the required file type icon.
- **Export Text Analytics** – You can export the survey responses for advanced text analysis.

Reports page overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page.

You can create reports based on the results of a selected survey and save them for the later use.

You can set the order of your reports and customize how many reports are displayed in the grid.

By default, your reports are sorted by the **Last Modified** column in the **Reports** grid. If you want to change how your reports are displayed in the grid, click a column header (**Report Title**, **Primary Source**, **Source Type**, **Owner**, **Last Modified**, or **Published**). An arrow is displayed up (ascending) or down (descending) to show the sort order. You can also change a column width by dragging the edge of the column header.

The default number of reports per page is **10**. You can select up to 100 reports to be displayed on the **Reports** page.

To manage all reports, select the check box next to the **Reports Title** column header.

On the **Reports** page, the following columns are available:

- **Report Title** – Name of a report.
- **Primary Source** – Name of the project (survey or profile), to which the report belongs.
- **Source Type** – Project type (survey or profile) to which the report belongs.
- **Owner** – The user to whom the report belongs.
- **Last Modified** – The last time when the report was changed.
- **Published** – The sharing status of the report.
- **Public Link** – The link to the public report.

On the **Reports** page, the following tabs are available:

- **Reports** – Create a new report for your survey, open, download, share, or delete an existing report.
- **Responses** – View, edit, export, or delete the survey responses.
- **Weighting** – Calculate the specific weight per survey respondent to ensure the accurate representation of a specific population, for example, males vs. females, within the data set.
- **Advanced Text** – Export the survey response data to the **Text Analytics** to analyze respondents' sentiment based on their responses to the **Essay** questions in your survey.
- **Insights** – Evaluate the verbatims in the **Text Analytics** by using the industry standard classification models.
- **Data Channels** – Map survey to the imported data.

> If the survey contains an **Image Upload** question, the **Images** tab appears in the left pane. For more information, see Images side tab, page 868.

On the **Reports** toolbar the following options are available:

- **Actions** – Perform a certain action to the selected report.

  The following actions are available:

  - **Duplicate** – Create a copy of your report.

- **Download** – Save a selected report in the Adobe PDF, Microsoft Word, or Microsoft PowerPoint format and create a cluster report.

> You can download the **Cross-tab Analysis** report only in the Microsoft Excel format.

  - **Schedule Report Email** – Send email messages to the report viewers at the specified date and time.
  - **Share with Other Users** – Share your report with other users. You can select which users can view the report, change the report name, and notify users by email that the report is available to view.
  - **Make Report Public** – Allow the users that do not have access to the product to view a report.
  - **Delete** – Remove the report from the grid.
- **New** – Create different types of reports. You can create a new report from scratch, standard report, or other reports and view the response data from your survey. For more information about report types, see Predefined reports, page 693.
- **Download Report** – Export your report to the selected format.
- **Share** – Share your report with other users.

  The following share options are available:
  - **Share with Other Users** – Share your report with other users.
  - **Make Report Public** – Allow the users that do not have access to the product to view a report.

In the **Reports** grid, you can sort reports by the **Report Title**, **Owner**, **Last Modified**, or **Published** columns. To open a report, click on it or select a check box next to the report title, and then on the toolbar, click the appropriate option.

According to your permissions, the report opens in the **Preview** or **Edit** report views. For example, if you have permission to edit reports, and you have full access to the shared report, then the report opens in the **Edit** report view. Otherwise, the report opens in the **Preview** report view. Additionally, the public link is displayed to the right of the **Edit** column in the grid for public reports.

By default, the **Reports** grid displays only the first 10 reports. To view more saved reports per page, click 25, 50, or 100 next to the **View per Page** section at the bottom of the **Reports** grid.

In addition, if the **Reports** grid is longer than one page, you can navigate between pages using the page navigation arrows in the lower-right corner of the **Reports** grid.

Create report on unpublished survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > report landing page or **Reports** page.

You can create reports not only for published (open) surveys but also during the survey designing process.

For the first report on your survey, you can create the report on the report landing page. If you have any saved reports, you can create reports on the **Reports** page.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > report landing page, and then select one of the following options:
   - **View Standard Report**
   - **Design from Scratch**
   - **View Responses**
   - **Export Text Analytics**

Name a report

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > report landing page or **Reports** page > **New** menu > click the report type you want to create > **Name Your Report** dialog box.

You can name the report directly when you create it, either on the **Reports** grid or on the report landing page.

The default name is the report type followed by the next incremental number, for example, Standard Report 2. Naming a report makes it easier to organize and find the report later.

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > report landing page.

   In the **Reports** grid, the first report appears unless you have already saved reports.
4. To create a standard report, click the **View Standard Report** button.
5. To create your own custom report, click the **Design from Scratch** button.

> You can also create other report types by clicking the **New** menu.

6. In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report.
7. Click **OK**.

Duplicate reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Actions** menu > **Duplicate** button.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **Actions** menu > click the **Duplicate** button.

You can copy the saved reports, edit the report copy, and save it.

The theme of the original report is automatically applied to the new copied report.

You can copy only one report at a time.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then select a check box next to the report that you want to copy.
4. On the **Reports** toolbar, on the **Actions** menu, click the **Duplicate** button.
5. In the **Duplicate a Report** dialog box, in the **Report Name** text box, enter the name of the report.
6. Click **OK**.

Delete reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Actions** menu > **Delete** button.

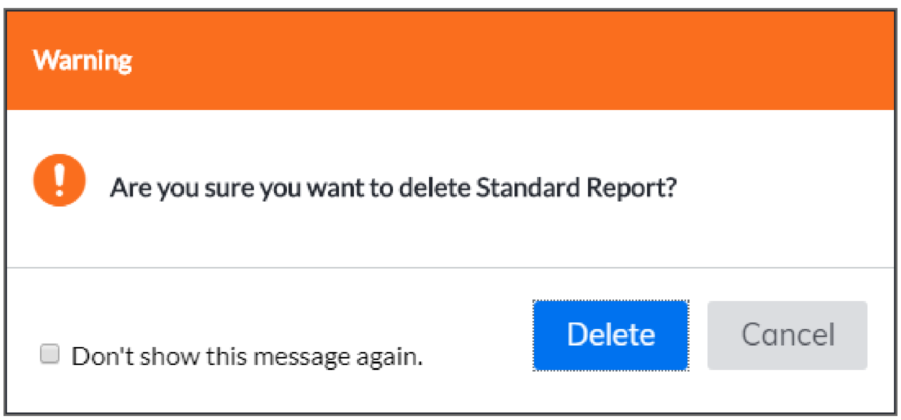
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **Actions** menu > **Delete** button.

You can delete one, a few, or all your reports.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then select a check box next to the report that you want to delete.
4. On the **Reports** toolbar, on the **Actions** menu, click the **Delete** button.
5. In the confirmation dialog box, click **Delete**.



The confirmation dialog box

Report types

Navigation

Report & Analyze tab > **Survey Reports** tab > **Reports** page > **New** menu.

You can automatically generate a wide variety of default reports with the predefined collection of report elements.

The following types of reports are available:

- **Blank Report** – The report type that allows you to insert charts, tables, and other report elements for a selected question manually. For more information, see Blank report overview, page 696.
- **Standard Report** – The default report that generates charts and tables for every question within your survey automatically. For more information, see Manage standard reports, page 687.
- **Frequency Report** – The report that shows the frequency distributions with counts and percentages of each close-ended question.
- **Verbatim Report** – The report that shows all responses to the verbatim (open-ended) questions.
- **Comprehensive Report** – The report that shows charts, summary statistics, and frequency distribution by selected question.
- **Executive Summary Report** – The report that shows overall summary information about each question.
- **Cross-Tab Analysis Report** – The report that shows a cross-tabulation of multiple variables at the same time.
- **Organization Performance Analysis Report** – The report that shows survey responses results associated with organizations and users.
- **Statistics Report** – The report that shows the summary statistics of the results, including means, medians, and standard deviations.
- **Single-Question Banner Report** – The report that shows a cross-tabulation of data based on selections for a specific question as compared with a demographic question of the **Multiple Choice** type.
- **Trend Report** – The report that shows an analysis of the survey data over a specified time period. By default, it provides the mean of each response, but you can customize it to your needs.
- **Summary of Means Report**– The report that shows a cross-tabulation of means for each question with options and provides a summary statistics as compared with two demographic questions of the **Multiple Choice** type.

Standard Report

Navigation

Report & Analyze tab > **Project Reports** tab > **New** menu.

You can automatically generate default reports with charts and tables for every question within your survey.

Create a standard report

Procedure

1. Go to the **Report & Analyze** tab > **Survey Reports** tab.
2. On the **New** menu, click the **Standard Report**.

   In the **Create Report** dialog box, you have access to the folders with the existing surveys, comment cards, profiles, data sets, and data stores.

> You can also search for the needed source by entering its name in the **Search** text box, and then clicking the **Search** button.

3. Click the arrow next to the folder that you need to expand, and then select the report source.

> Only published data stores are available in the **Data Stores** folder.

4. Click **Create**.

Rename a Report

Procedure

1. In the report designer, click the report name.
2. Edit the report name.
3. To apply changes, press **Enter**.

Every question with its report is placed on a separate page. For page names, the corresponding question text is used.

Once you create a standard report, the element editor opens in the left pane. You can customize the report to your needs by changing the report element properties in the element editor.

The standard report creates a report element for each survey question depending on the question type. Each report element is shown on a separate page in the same order as the questions in the survey designer. Each page is named according to the question text.

In the standard report, the **Response List** report element is used by default for the **Fill in the Blank** and **Essay** questions. **Frequency Chart** report element is used for all the other questions. For the **Matrix** question, the generated report elements depend on the side being reported.

Manage standard reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > report landing page or **Reports** page > click the **View Standard Report** button.

You can automatically generate default reports with charts and tables for every question within your survey.

Create a standard report (for survey without reports)

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.

2 On the **My Surveys** page, create a new survey or open an existing one.

3 Go to the **Analyze** tab > report landing page.

In the **Reports** grid, the first report appears unless you have already saved reports.

4 To create a standard report, click the **View Standard Report** button.

5 In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report.

6 Click **OK**.

Create a standard report (for survey with reports)

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.

2 On the **My Surveys** page, create a new survey or open an existing one.

3 Go to the **Analyze** tab > **Reports** toolbar, and then click the **New** menu.

4 In the **New** menu, click the **Standard Report**.

5 In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report.

6 Click **OK**.

Rename a report

Procedure

1 In the report designer, click the report name.

2 In the text box that appears, edit the report name.

3 To apply changes, press **Enter**.

Every question with its report is placed on a separate page. The corresponding question text is used for the page names. For the first report on your survey, you can create the standard report on the report landing page. If you have any saved reports, you can create the standard report on the **Reports** page.

Once you create a standard report, the element editor opens in the left pane. You can customize the report to your needs by changing the report element properties in the element editor.

The standard report creates a report element for each survey question depending on the question type. Each report element is shown on a separate page in the same order as the questions in the survey designer. Each page is named according to the question text.

In the standard report, the **Response List** report element is used by default for the **Fill in the Blank** and **Essay** questions, and the **Frequency Chart** report element is used for all the other questions. For the **Matrix** question, the generated report elements depend on the side being reported.

Share reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Actions** menu > click **Share with Other Users**.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **Actions** menu > click **Share with Other Users**.

You can share your reports with other users or organizations with a view access to them and view the reports that are shared with you by other users.

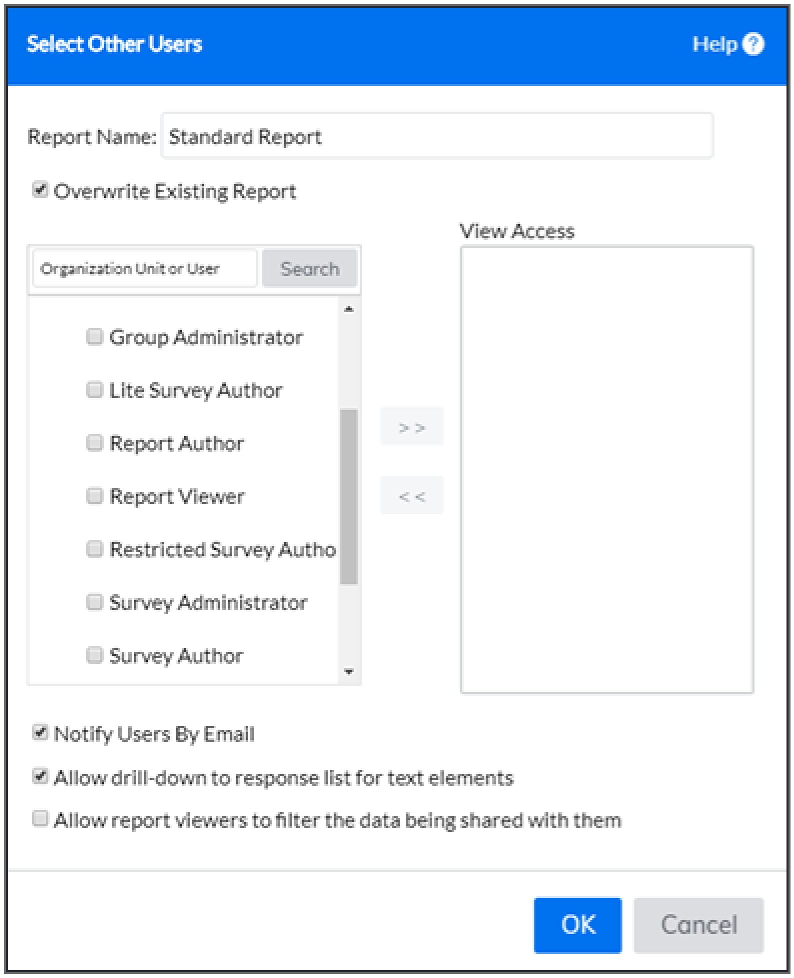
This feature is also available for the profiles.

When the report is shared with you, you are informed about it by email. The shared reports appear on the **Reports** tab when you use the **Shared with Me** quick filter.

If one report has been shared with you several times, only the last modified copy appears on the **Reports** tab. If you have the corresponding permission, you can scroll and navigate through the shared report pages, export the report, and filter the shared report data.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then select the check boxes next to the reports that you want to share.
4. On the **Reports** toolbar, on the **Actions** menu, click **Share with Other Users**.



The Select Other Users dialog box

5 In the **Select Other Users** dialog box, select a check box next to the user or the organization, and then click the right arrow button to move them to the **View Access** box.

All users that are assigned to the selected organization as well as all child organizations will be moved to the right box too. You can share the report with the users or organizations that you do not want by selecting the corresponding check boxes and clicking the left arrows button.

6 To send an email notification to the users that are allowed to view the reports, select the **Notify Users by Email** check box.

The check box is selected by default.

7 To allow users to click the embedded text analytics report elements, such as the **Word Cloud** element or **Sentiment Chart** element, and view responses that represent them, select the **Allow drill-down to response list for text elements** check box.

The check box is selected by default.

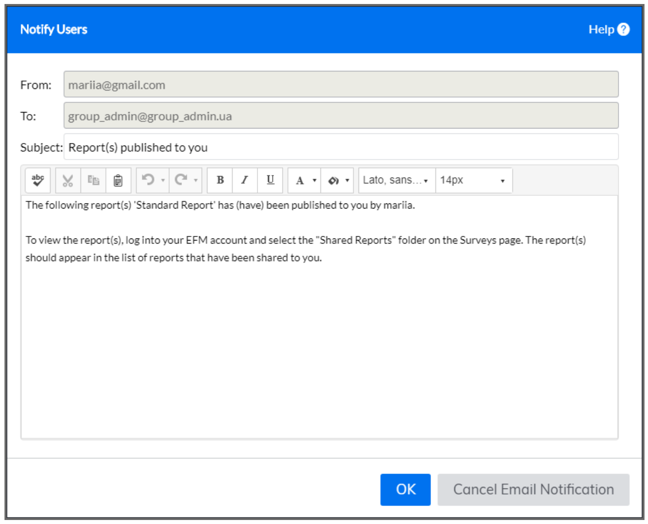
For more details, see Word Cloud – Filtering, page 918 and Sentiment Chart – Filtering, page 897.

8 To allow users to apply filters to the reports that are shared with them while viewing, select the **Allow report viewers to filter the data being shared with them** check box.

The check box is clear by default.

9 Click **OK**.

10 In the **Notify Users** dialog box, edit the email notification.



The Notify Users dialog box

The **Notify Users** dialog box opens only if the **Notify Users by Email** check box is selected.

11 Click **OK**.

If the report that is containing the response image is shared with users with no view access, the **Permission Denied** message appears.

Stop reports sharing

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Actions** menu > click **Share with Other Users**.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **Actions** menu > click **Share with Other Users**.

You can share your reports with other users or organizations with a view access to them and view the reports that are shared with you by other users. You can also stop reports sharing with other users.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then select the check boxes next to the previously shared report.
4. On the **Reports** toolbar, on the **Share** menu, click **Share with Other Users**.
5. In the **Select Other Users** dialog box, in the **View Access** text box, select the user or organization with which you want to stop the report sharing
6. To move the selected user or organization to the **Users** text box, click the left double arrow button.
7. Click **OK**.

   The report is no longer available for viewing by the user or organization.

When the multiple reports are selected, you can only add the report viewers. To view the list of users who have access to the report and stop the report sharing, select a single report.

Predefined reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** tab > **Analyze** tab > **Reports** page > **New** menu.

You can automatically generate a wide variety of default reports with the predefined collection of the report elements.

On the **New** menu, the following report types are available:

- **Blank Report** – The report type in which you can manually insert charts, tables, and other report elements for the selected question (see Blank report overview, page 696).
- **Standard Report** – The default report, that automatically generates charts and tables for every question within your survey (see Manage standard reports, page 687).
- **Frequency Report** – The report type in which the frequency distributions with counts and percentages of each close-ended question are displayed.
- **Verbatim Report** – The report type in which all responses to the verbatim (open-ended) questions are displayed.
- **Comprehensive Report** – The report type in which the charts, summary statistics, and frequency distribution by selected question are presented.
- **Executive Summary Report** – The report type in which the overall summary information about each question is presented.
- **Cross-Tab Analysis Report** – The report type in which the cross-tabulation of multiple variables at the same time is available.
- **Organization Performance Analysis Report** – The report type in which the survey responses results associated with organizations and users are displayed.
- **Statistics Report** – The summary statistics of the results, including means, medians, and standard deviations are presented.
- **Single-Question Banner Report** – The report type in which the cross-tabulation of data based on the selections for the specific question as compared with a demographic question of the Multiple Choice type is available.
- **Trend Report** – The report type in which the analysis of the survey data over the specified time period is displayed. By default, it provides the meaning of each response, but you can customize it to your needs.
- **Summary of Means Report** – The report type in which the cross-tabulation of means for each question with options and the summary statistics as compared with two demographic questions of the Multiple Choice type is available.

Create predefined report

Navigation

Report & Analyze tab > **Survey Reports** tab > **Reports** page > **New** menu.

You can automatically generate a wide variety of default reports with the predefined collection of the report elements.

In this example, creation of the **Single-Question Banner** report is described.

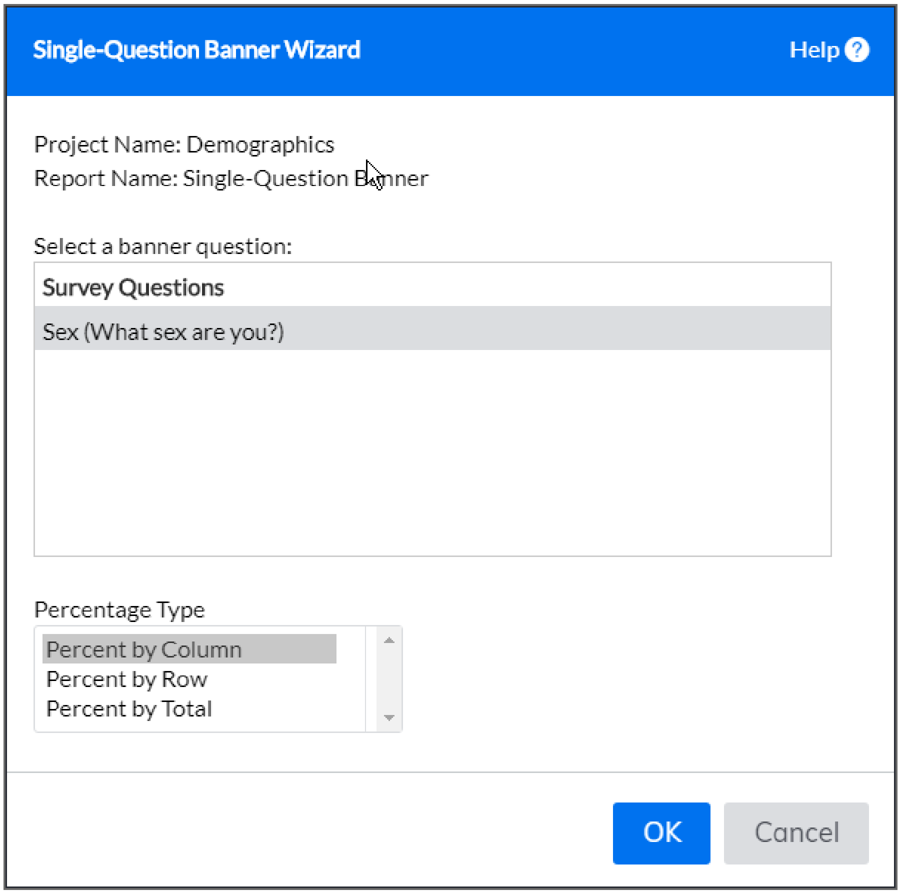
Procedure

1. Go to the **Report & Analyze** tab > **Survey Reports** tab.
2. On the **New** menu, select the report type that you want to create.
3. In the **Create Report** dialog box, you have access to the folders with the existing surveys, profiles, comments, data sets, Speech Analytics projects, Unified Data Set projects, ForeSee projects, or file imports.

> You can also search for the needed source by entering its name in the **Search** text box, and then clicking the **Search** button.

> Data from the Unified Data Set is available only if the System Administrator activates the **Unified VoC** license for your workgroup.

4. Click the arrow next to the folder that you need to expand, and then select the report source.
5. Click **Create**.



The Single-Question Bannder dialog box

6 In the **Single-Question Banner** dialog box, in the **Select a banner question** menu, select the question.

7 In the **Percentage** menu, select the type of percentage to be displayed in your report.

8 Click **OK**.

Blank report overview

Navigation

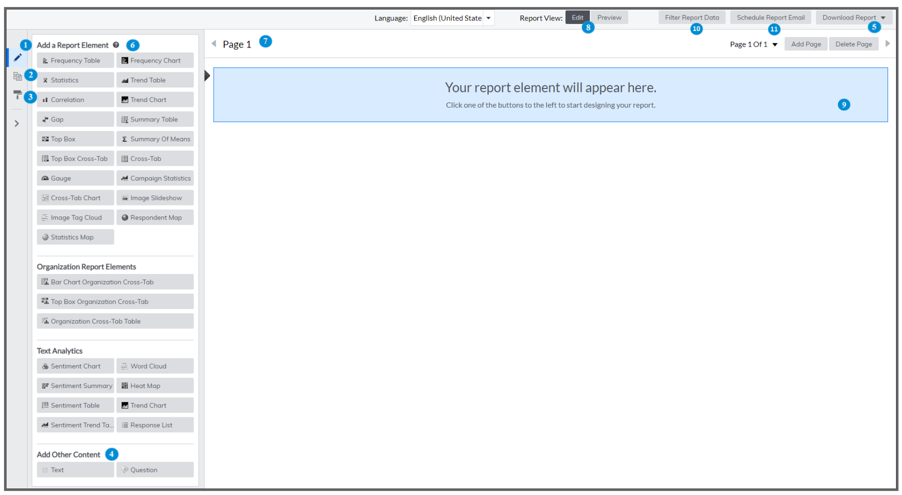
Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Design from Scratch** option.

You can create and manage your reports on the collected response data. You can insert charts, tables, and other report elements for the selected question.

> For more information, see Report Options page, page 246.

When you open a new **Blank Report**, the report does not display any charts or tables (report elements) in the **Report Content** area. You can create your own custom report. The types of available report elements depend on the selected question. Different questions have different chart and table options.

Other features of the **Blank Report** include the ability to organize your report into sections, manage report properties, download report data, print the report, and so on.



Blank Report features

Item	Description
1	Display the **Edit** report view of the report where you can add report elements and other content.
2	View the report pages.
3	View the report properties.
4	Add question text or free-form text to the report.

Item	Description
5	Download the report to a Microsoft PowerPoint, Microsoft Word, or Adobe PDF format.
6	Add a chart or table to the report on the **Add a Report Element** menu. You can edit report elements on the **Edit Content Panel**.
7	Edit the page title of the report.
8	Toggle between the **Edit** and **Preview** report views of the report.
9	Insert and organize charts and tables in the content area.
10	Filter the report based on data criteria and dates.
11	Prepare the report email message and schedule the date for its delivery.

Create a blank report

Navigation

Report & Analyze tab > **Survey Reports** tab > **Reports** page > **New** menu.

You can create and manage several types of reports on the collected response data by using the product.

You can create several report types, including the **Blank Report**. You can insert charts, tables, and other report elements for a selected question. For more information, see the Report Options page, page 246.

When you open a new **Blank Report**, your report does not display any charts or tables (report elements) in the **Report Content** area. You can create your own custom report. The types of available report elements depend on the selected question. Different questions have different chart and table options.

> For more information, see Blank report overview, page 696.

Procedure

1 Go to the **Report & Analyze** tab > **Survey Reports** tab.

2 On the toolbar, click the **New** button. The **Create Report** dialog box opens showing the folders with the existing surveys, comments, profiles, data sets, Speech Analytics projects, Unified Data Set projects, ForeSee projects, and file imports to which you have access.

> You can also search for the needed source by entering its name in the **Search** text box, and then clicking **Search** next to the text box.

> Data from the Unified Data Set is available only if the System Administrator activates the **Unified VoC** license for your workgroup.

3 Click the arrow next to the folder that you need to expand, and then select the report source.

> Only published file imports are available in the **File Imports** folder.

4 Click **Create**.

> You can also create a blank report by clicking the **Blank Report** option on the **New** menu on the toolbar.

Report preview mode

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > click the **Preview** button.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > click the **Preview** button.

You can view your report current appearance during the report designing or editing process, export your report to the Microsoft Word, Microsoft PowerPoint, or Adobe PDF format, and create a cluster report.

You can access the report **Preview** mode by clicking the **Preview** button. If you are logged in to the application as a report viewer, click the report title to preview the report.

> For more information on how to preview a report as a report viewer, see Report Viewer Grid, page 863.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open a saved one.
4. On the report designer, on the toolbar, click the **Preview** button.
5. In the report preview window, navigate through the report pages by clicking the **Previous Page** and **Next Page** buttons or **Go to Page** menu.

> If you rename the report pages, the **Go to Page** menu contains those names.

6. To export the report to the Microsoft Word, Microsoft PowerPoint, or Adobe PDF format, and create a cluster report to view the report results outside the product, click the **Download Report** menu.

> For more information on how to download the reports, see Downloading reports, page 1012 and Cluster Reports, page 1013.

Add a Report Element panel

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

You can add different elements to your report.

On the **Add a Report Element** panel, 19 report elements and 2 other content options are available:

- **Frequency Table** – Table that displays both the number and percentage of respondents who answered the specified question.
- **Frequency Chart** – Chart that displays the frequency of responses to a selected question.
- **Trend Table** – Table that reports a time series analysis on the selected question.
- **Trend Chart** – Chart that reports a time series analysis on the selected question.
- **Summary Table** – Table that displays the results of one question's responses against two demographic fields.
- **Summary of Means** – Table that reports the means of the responses based on two questions.
- **Cross-tab** – Report element that is a cross tabulation of two selected questions.
- **Response List** – Report element that displays answers from an open-ended question in the report.
- **Statistics** – Report element that is a various statistics from a question.
- **Correlation** – Report element that is a statistical technique that is showing how strongly a pair of variables is related. The range of potential values is from -1.0 to +1.0. A correlation approaching 1.0 signifies that two values are strongly related to one another in the same direction.
- **Gap** – This element reports on the differences between two numerical values. The **Gap** element subtracts the mean of the **Comparison** question from the mean of the **Basis** question. The **Gap** element is displayed both numerical and in a horizontal bar chart.
- **Top Box** – Report element that displays a cumulative value of the top two items of a rating scale. Researchers often combine the top two ratings as a way of comparing or evaluating preferences. Add this report element to define the number of rating points that are used in the top and bottom box calculation and choose from several options including the ability to display counts or percentages.
- **Top Box Cross-tab** – Report element that creates a summary of the responses to a question that is broken down by the responses of another question and presents the results by using a **Top Box** analysis format.
- **Gauge** – Report element that visualizes your scale-based questions as a gauge.
- **Campaign Statistics** – Report element that provides a quick overview of your campaign performance.
- **Cross-tab Chart** – Report element that provides a visual cross-tabulation of two selected questions as a chart.
- **Image Slideshow** - Report element with the help of which you can easily view and rotate images that are uploaded by the respondent when answering the **Image Upload** question.
- **Statistics Map** – Report element that adds a statistics map to your report that displays the specific metrics from a question.

- **Respondent Map** – Report element that adds a respondent map to your report that displays the geographical distribution of the survey respondents.
- **Text** – Add text to your report.
- **Question** – Insert the text of a question into the report.

Report elements selection

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

You can customize your report by adding and editing report elements.

When you create or edit a report, in the **Add a Report Element** panel, the following all report elements are available:

- Frequency Table
- Statistics
- Correlation
- Gap
- Top Box
- Top Box Cross-tab
- Gauge
- Cross-tab Chart
- Frequency Chart
- Trend Table
- Trend Chart
- Summary Table
- Summary of Means
- Cross-tab
- Campaign Statistics
- Image Slideshow
- Image Tag Cloud
- Statistics Map
- Respondent Map

Organization Report Elements

- Bar Chart Organization Cross-tab
- Top Box Organization Cross-tab
- Organization Cross-tab Table

Text Analytics

- Sentiment Chart
- Sentiment Summary
- Sentiment Table
- Sentiment Trend Table
- Word Cloud
- Heat Map
- Trend Chart
- Response List

Add Other Content

- Text
- Question

Add report elements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

OR

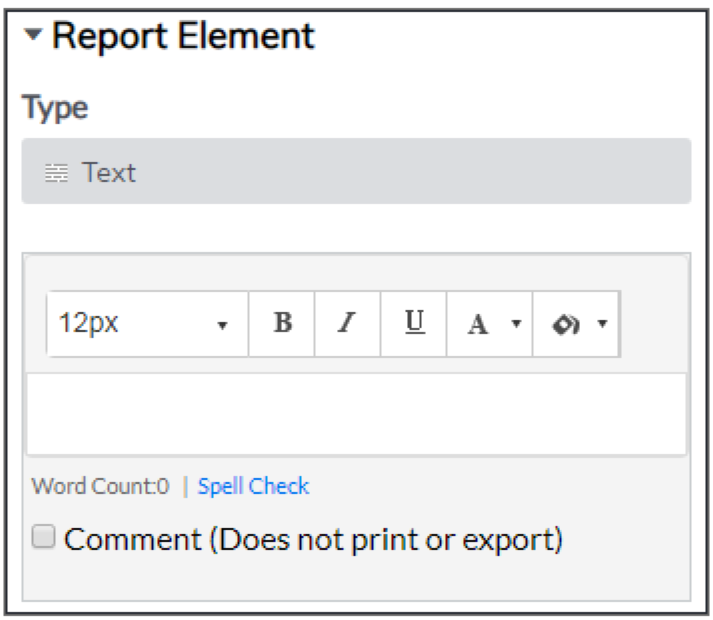
Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

You can add a new report element from the right content area by clicking the **Add** button.

> The **Add** button is displayed only if at least one report element is added to your report. You can paste the copied report element by clicking the **Paste** button next to the **Add** button.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. In the **Add a Report Element** panel, add at least one report element.
5. To add a new element, click the **Add** button.
6. In the left pane, click the **Text** button, for example, to add free-form text to your report.
7. In the **Edit Content Panel**, edit your text element.



Edit text element

You can add a number of report elements to a report depending on the question type. The procedure above is applicable for all report elements, except for the **Text** element.

Add report elements from different sources

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

You can have report elements from different projects in one report.

You can use all surveys and profiles to which you have access, including the **My Surveys**, **Shared Surveys**, **Other Users' Surveys**, **Comments**, **Profiles**, **Data Sets**, **Speech Analytics**, and **File Imports** folders.

You can also view a notice of the report element source on each report element. For more information, see Show Multi-Source Citation, page 708.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. In the **Add a Report Element** panel, click the report element that you want to add to your report.

> For this example, the **Trend Table** report element is used.

5. In the **Select data for your report element** dialog box, next to the **Data Source** option, click the project name which appears as a link.

> By default, the current project name is displayed.

6. Select the survey, comment, profile, data set, Speech Analytics project, Unified Data Set project, ForeSee projects, or file import from which you want to add a report element.

> Items in the **Design** report view are not shown.

> Data from the Unified Data Set is available only if the System Administrator activates the **Unified VoC** license for your workgroup.

7. To search for the specific survey, comment, profile, data set, Speech Analytics project, Unified Data Set project, or file import, enter a partial or whole name of the item in the search box, and then click the **Search** button. The list of surveys, profiles, comments, data sets, Speech Analytics projects, Unified Data Set projects, or file imports that match your input displays.
8. On the **Questions** menu, select the source question for the **Trend Table** element.

Only questions appropriate for this report element are displayed.

9 Click **Add**.

Data filtering is not allowed for reports that use multiple sources, so the **Data Filter** section is limited in functionality. If a filter is applied to a report and you add a new element from different source, the current report filter is removed.

If the **Logged-in User** filter is applied to a multi-source report, and a new report element is added for a non-organization scoped survey (without the **Employee External ID** or **Organization External ID** question), the filtering is removed on a report level. For more information about the **Logged In User** filter, see Filters, page 723.

Show Multi-Source Citation

Navigation

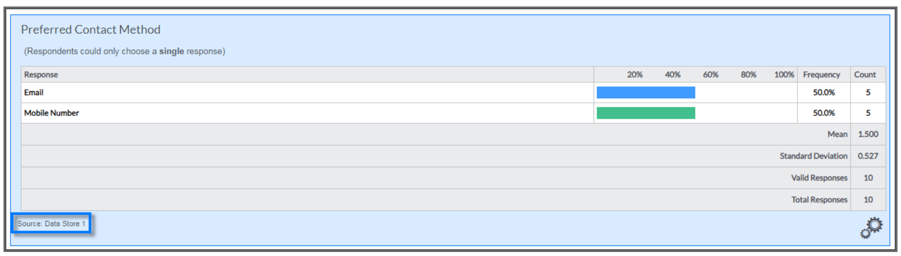
Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > add an element to the report > **Report Element** menu.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > add an element to the report > **Report Element** menu.

You can view the element data source if the report uses more than one data source.

You can activate this option by selecting the **Show Multi-Source Citation** check box on the **Report Element** menu. This option is active by default. When the **Show Multi-Source Citation** check box is selected, the source is displayed on all report elements, including exported reports and widgets. If the same source is used for all report elements, the source citation is not displayed.



The report element source

Activate auto-sizing option

Navigation

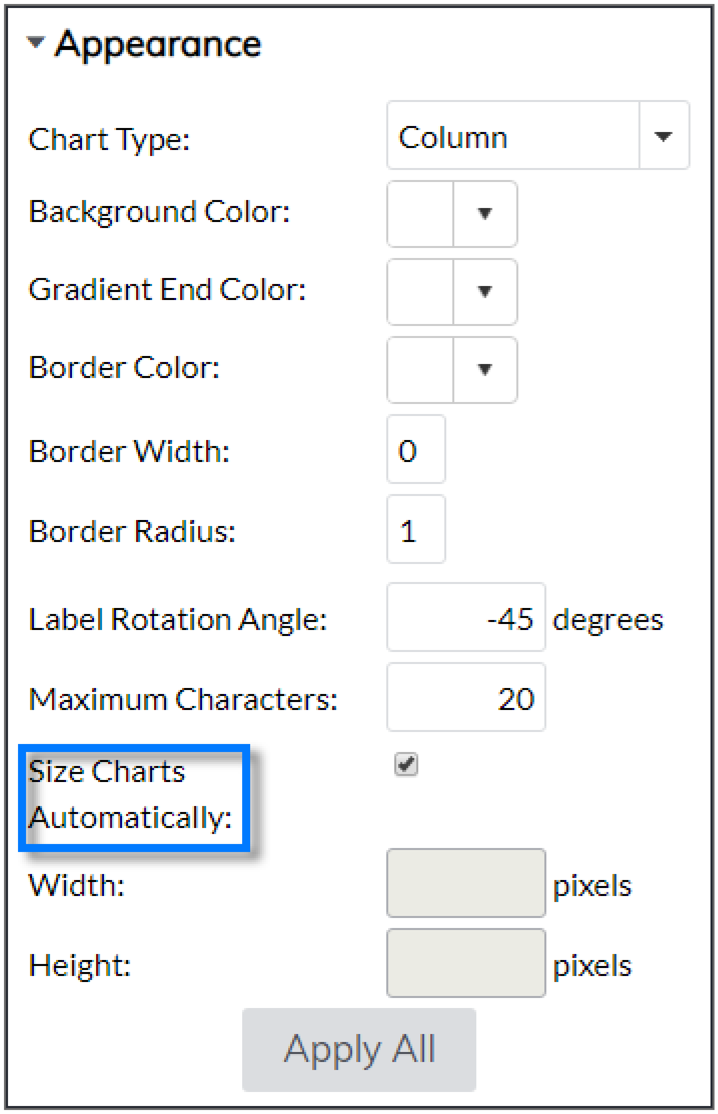
Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Chart** or **Frequency Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Chart** or **Frequency Chart** report element.

You can select the auto-sizing option for better appearance of the **Frequency Chart** and **Trend Chart** report elements.

When the **Size Charts Automatically** check box is selected, the charts fit the current window size automatically.



The Size Charts Automatically check box

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.

2 On the **My Surveys** page, create a new survey or open an existing one.

3 Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.

4 On the **Add a Report Element** panel, add the **Frequency Chart** or **Trend Chart** report element.

5 Click the **Appearance** menu, and then select the **Size Charts Automatically** check box.

If you activate the auto-sizing option and resize the browser window, the high chart components shrink or extend accordingly, so that the chart fits the window.

The **Size Charts Automatically** check box is selected by default.

When the auto-sizing option is activated, all the other report elements also resize to fit the window, but the tables containing a large amount of columns may not shrink. The maximum width of the chart with the auto-sizing option activated is set to 900 pixels. The auto-sizing option does not change the height of the high chart component. The minimum width and height of the chart are set to 480 and 360 pixels correspondingly. The auto-sizing option does not affect embedded report elements, since they have a default height and width.

When the **Size Charts Automatically** check box is selected, the **Width** and **Height** text boxes in the **Chart Appearance** menu are inactive.

Drag report elements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > add an element to report > select an element that you want to drag.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > add an element to report > select an element that you want to drag.

You can rearrange your elements within a report by dragging them.

This feature is also available for the profiles and such report elements as text and question.

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.

2 On the **My Surveys** page, create a new survey or open an existing one.

3 Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.

4 On the report designer page, hover over a report element that you want to drag.

5 Move the element to the appropriate location by dragging its top bar.

Returning to the top of the report page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > scroll down the report page > click **Return to top of page** arrow.

When you scroll down the report page and report designer toolbar disappears from your view, the **Return to the top of the page** arrow appears in the lower-right corner of the page.

You can click the arrow to return to the top of the page immediately. Once the toolbar comes into your view, the **Return to the top of the page** arrow disappears. This functionality is available in the **Preview** and **Edit** report views.

For the public reports, this functionality is not available.

Report toolbar options

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing saved one > **Reports** toolbar.

OR

Report & Analyze tab > **Survey Reports** tab > **Reports** page > create a new report or open an existing one > **Reports** toolbar.

You can use the toolbar options in the report designer to manage your report.

On the **Reports** toolbar, the following options are available:

- **Language** – You can view the report in every language into which the survey is translated.
- **Report View** – You can switch between the **Edit** and **Preview** modes for your report.
- **Filter Report Data** – You can apply data and date filters to your report. To apply selected filters, click **OK**.
- **Schedule Report Email** – You can send the email messages to the report viewers at the specified date and time.
- **Download Report** – You can export your report to a Microsoft Word, Microsoft PowerPoint, or Adobe PDF format or create a cluster report.

Multilanguage reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing saved one > **Reports** toolbar > **Language** menu.

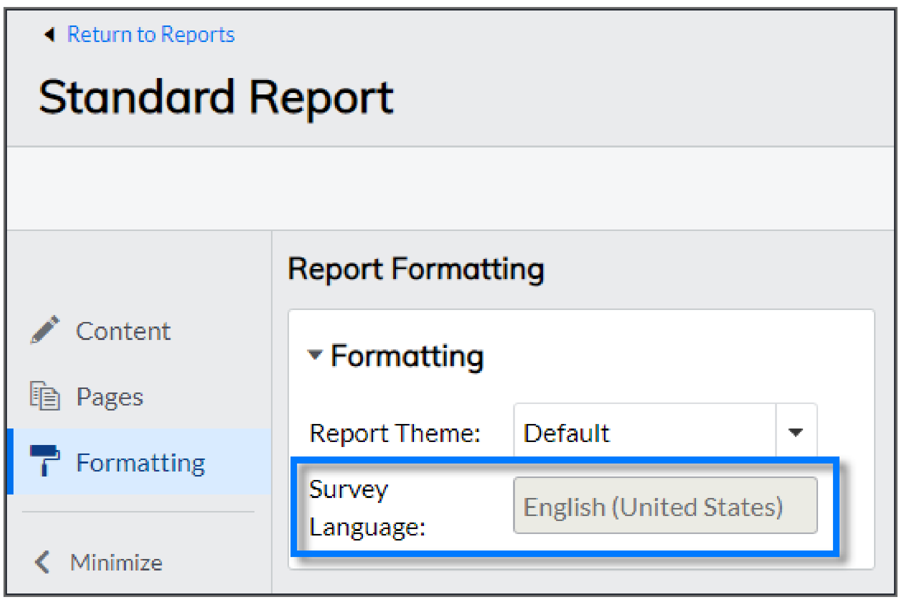
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing saved one > **Reports** toolbar > **Language** menu.

You can view the report in every language into which the survey is translated.

To switch between the languages, on the **Report** toolbar, on the **Language** menu, select the needed language.

You can view the survey base language in the report designer to see which language is used for your report. The **Survey Language** text box is available on the **Formatting** tab. You cannot change the survey base language from this location. You can use it only for information purposes.



The survey base language in the report designer

You can export the report with the translations, but this functionality does not apply to the widgets. You can export widgets only in the base language.

Schedule report delivery

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Reports** toolbar > **Schedule Report Email** button.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Reports** toolbar > **Schedule Report Email** button.

You can schedule reports to be delivered regularly to the report viewers so that they can access them.

On the **Schedule Report Delivery** page, you can create the email message, add recipients, select the file format, and schedule the delivery.

> You can also access the report scheduling functionality by clicking the **Schedule Report Email** option on the **Reports** page, on the **Actions** menu.

If there is an organization hierarchy defined for a workgroup, the report data is scoped to the recipient's organization access. For external emails, the data is scoped according to the task creator's organization access.

> If you close a survey, the scheduled responses export is performed one more time. If you reopen the survey, the export of responses is performed till the scheduled date expires.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. On the toolbar, click the **Schedule Report Delivery** button.

> The **Cross-tab Analysis** report can be downloaded only in Microsoft Excel format. If you want to zip the attachment, click the **Zip attachments** check box, and the report in the selected format is attached to the email message in a ZIP archive.

5. On the **Schedule Report Delivery** page, in the **To** text box, enter the email address of the recipient.

> You can add multiple addresses separating them by commas or semicolons.

6. To select the recipients within the organization hierarchy, click the **To** button.
7. In the **Survey Report Recipients** dialog box, select the check box next to the user or organization, click the right arrow button to add them to the **Recipients** list, and then click **OK**.
8. In the **From** text box, specify the email address from which you want to send your message.

   By default, your email address is selected.
9. In the **Subject** text box, enter the message subject.
10. In the email text box, enter the message text and customize it by using the editing toolbar.

11 To preview your message, click the **Preview** button.

12 To test your message before delivering it to the recipient, click the **Send Test Email** button.

13 In the **Send Test Email** dialog box, in the **Email Address** text box, enter your email address, and then click **Send**.

14 In the **Delivery Schedule** section, define the message delivery schedule and the recurrence options.

The following options are available:

- **No Scheduling** – You can send your message later. You may want to select it if you have not finished adding recipients, writing your message, or have not yet decided when to send the message. This option removes scheduling.
- **Send Now** – You can send your message immediately. There may be a delay of several minutes before your email is delivered to participants.
- **Send at a specific date and time** – You can specify a date and time when you want to deliver your email. You can either type the date and time manually into the available text box or select the date and time from the pop-up menus. Select a valid start date and time, otherwise the email will not be saved.

> To specify the recurrence options for your message delivery, click the **Show Recurrence Options** link. Use this functionality to send a message multiple times on a daily, weekly, or monthly basis. You can also set the end date or select the **No End Date** option.

15 Click **Save**.

Pages tab

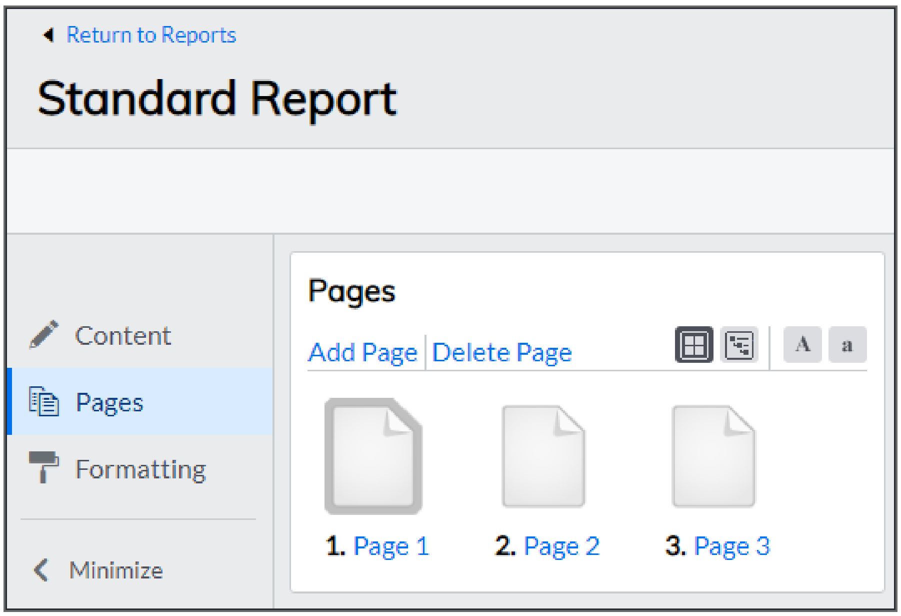
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Pages** tab.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Pages** tab.

You can change the page order, view, rename, add, and delete pages from the report.



The Pages side tab

In the **Pages** pane, you can manage your reports in the following way:

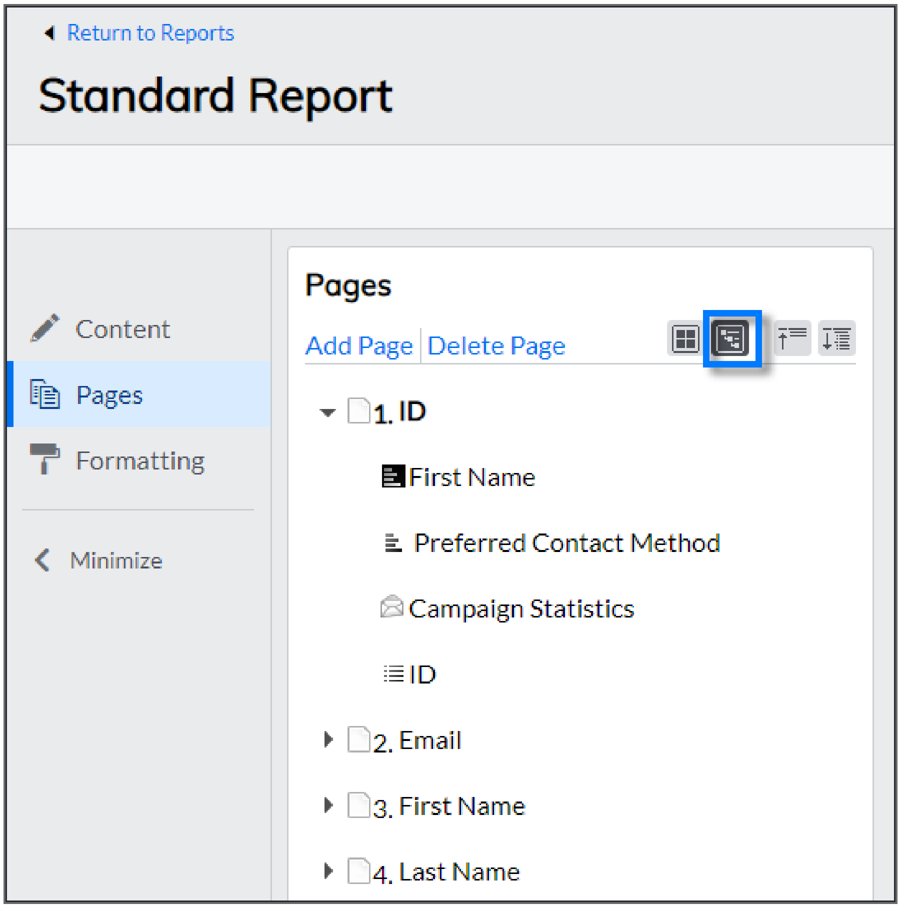
- To open the page, click the page icon.
- To add a page to the report, click the **Add Page** link.
- To delete the current page from the report, click the **Delete Page** link.
- To rename a report page, click the page name, edit it, and then press **Enter**.
- To move a page within the report, drag the page icon into a new position.
- To change the page icons size, click the  icon or  icon.

In the **Pages** panel, you can switch the page between the **Thumbnails** and **Tree** views.

The **Thumbnails** view is the default view of the report pages. To see the hierarchical structure of the page, on the **Pages** panel, click the **Tree** icon.

The **Tree** view shows the report element level information on each page in your report. The icon that is showing the report element type appears to the left of the question heading. The question heading or question text can appear in the **Tree** view depending on the report element or report theme settings.

To view the report elements on a certain page, click the black arrow next to that page to expand it. You can expand or collapse all pages and view their content by clicking the **Expand All** or **Collapse All** options (and icons correspondingly). By default, all pages are collapsed.



The Tree view

When you click the page or element heading on the **Pages** panel, it appears in the report content area.

Formatting tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Formatting** tab.

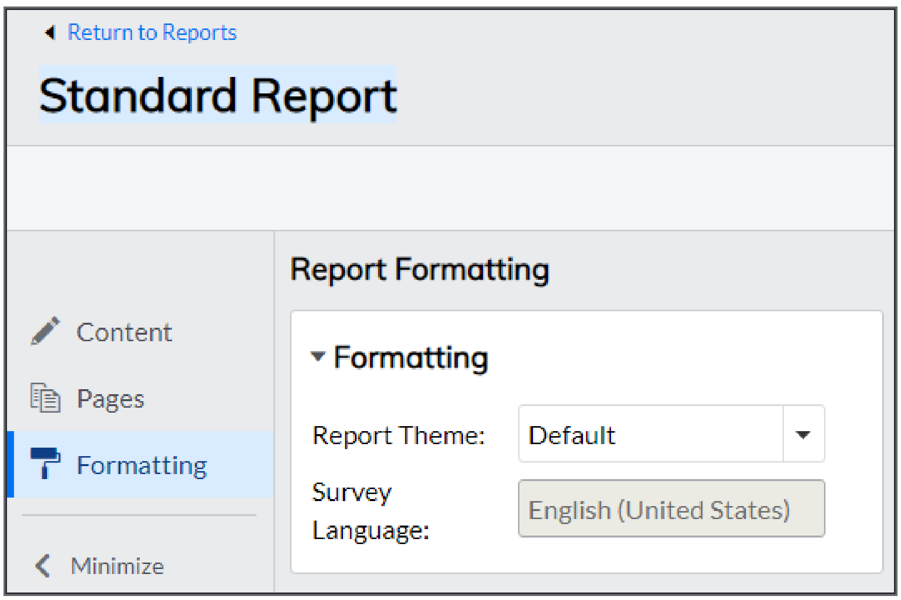
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Formatting** tab.

You can change the look of your report by applying a report theme.

When you create a new report, the report theme currently defined as default theme on the **Library** tab, on the **Report Themes** tab. You can change the theme of your report without changing the default theme of the other reports. The selected theme applies to all elements in your report.

If you modify a report element, its new properties override the theme settings for the existing elements of this type in your report. New elements of this type that are added to the report will still use the current theme settings.



The Formatting side tab

For more information, see Report Themes, page 1299.

Change a report theme

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Formatting** tab.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Content** pane > **Formatting** tab.

You can change the look of your report by applying a report theme.

When you create a new report, the report theme currently defined as default theme on the **Library** tab, on the **Report Themes** tab. You can change the theme of your report without changing the default theme of the other reports. The selected theme applies to all elements in your report.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. To open the **Report Themes** pane, click the **Formatting** side tab.
5. On the **Theme** menu, select the report theme .

Pagination bar overview

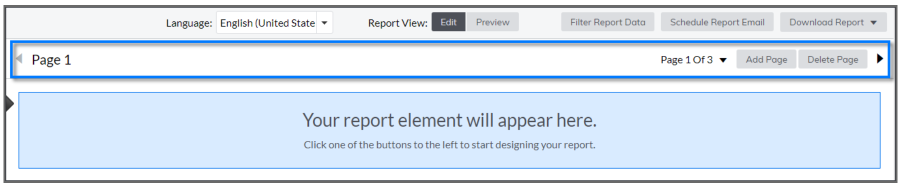
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > report landing page or **Reports** page > click the report type you want to create.

OR

Report & Analyze tab > **Project Reports** tab > report landing page or **Reports** page > click the report type you want to create.

You can navigate through the report pages and add new pages to your report, edit your report name, and switch between the **Edit** and **Preview** report views.



The report pagination bar

On the report pagination bar, the following options are available:

- **Page # of #** – You can view the number of the current page and the total number of the report pages, for example, **Page 1 of 3**.
- **Go to Page** – You can navigate to another report page.
- **Add Page** – You can add a new page to your report. When you click the **Add Page** link, a new page is added immediately after the current page and opens for viewing or editing.
- **Delete Page** – You can remove the page from your report. When you click the **Delete Page** link, the confirmation dialog box opens that is showing the number of report elements on the selected page. To confirm the page removing, click **Delete**.
- **Report View** – You can switch between the **Edit** and **Preview** report views. When you click the **Preview** link, a new window opens that is showing the report in its current state with the theme applied.
- **Page navigation** – You can navigate to the next or previous report page by clicking the arrows.

Filters

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Reports** toolbar > **Filter Report Data** button.

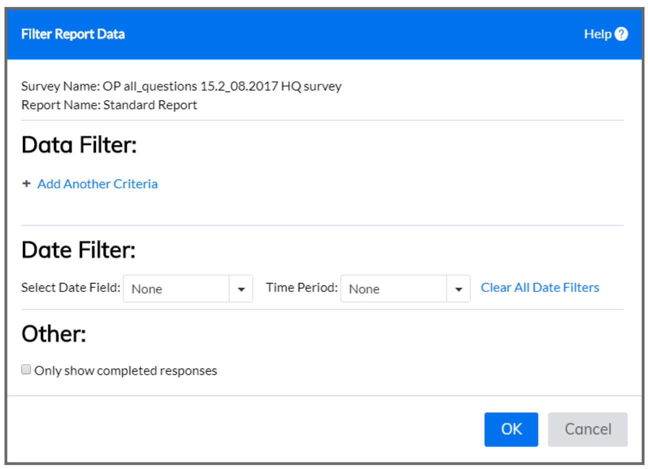
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Reports** toolbar > **Filter Report Data** button.

You can apply the data and date filters to your report to view only the certain results.

The data filter is based on questions, columns, or profile data. The date filter is based on the date when responses are last modified and on the selected time period.

The filter dialog box includes the **Data Filter** and **Date Filter** sections where you can set both filters at the same time.



Creating the report filter

Data filtering is not allowed for reports that use multiple sources so the **Data Filter** section is limited in functionality.

If a filter is applied to a report and you add a new element from another source, the current report filter is removed.

When you use a filter like the **Last Week**, **Last Month**, **Last Quarter**, and the rest, the filter will continue to update accordingly to the current date and not the date when it is created.

Data Filter

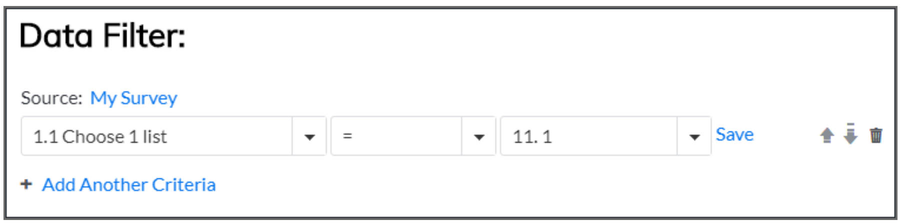
In the **Data Filter** section, you can define the filter criteria based on your report data by clicking the **Add Another Criteria** link.

- **Source** – Click the **My Survey** link to apply the **Current Survey**, **Columns**, **Profiles**, or **Data Channels** filtering criteria to your report element.
  - **Current Survey** – Questions from the survey are available as criteria.
  - **Columns** – The **Participant Information**, **Respondent System Information**, and **Respondent Location** data from the **Response Manager** are available as criteria.
  - **Profile** – Basic information taken from the Panelist profile is available as criteria.
  - **Data Channels** – The corresponding file import columns mapped to a survey are available as criteria.

For more information about data channels, see Map a file import to project or profile, page 1174.

- **Filter parameter** – Click the question or column by which you want to filter your report data in the drop-down list.
- **Expression** – Click the expression in the drop-down list to make a comparison between the **Filter parameter** and **Value**.

The options vary depending on the filter type.



The Data Filter section

- **Value** – Click the response choice for comparison in the drop-down list. The available options vary depending on the question type and column. For example, the **Multiple Choice: Choose One** and **Multiple Choice: Choose Many** questions include all available options, and for the **Fill in the Blank** questions you need to specify the response choice.
- **Save** – Click the link or anywhere else in the dialog box to save your criterion.
- **Remove** – Click the icon to delete the filter.
- **Up/Down** – Click the **Up** or **Down** arrows to move the selected filter up or down one level in the list. Filters are applied in a sequential manner, and their position in the list is important.

You can have a combination of the **Current Survey**, **Columns**, and **Profiles** filtering criteria. If you add multiple criteria, you can combine them by using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The drop-down lists with parentheses and the **And**/**Or** operators appear next to each criterion. The **And** operator defines that two or more filters are true for the responses included in the report. The **Or** operator defines that one of the filters linked together is true.

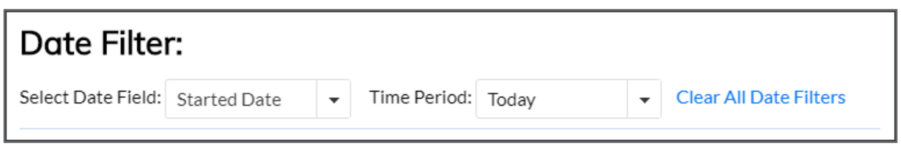
Date Filter

In the **Date Filter** section, you can set the filter based on the date when responses are last modified and based on the selected time period.

- **Select Date Field** – Click an option in the drop-down list to filter the responses based on their modification date. The following options are available:
    - **None** – Applies no date filters and is selected by default.
    - **Started Date** – Applies the filter based on the date when the survey was started.
    - **Modified Date** – Applies the filter based on the date when the survey was last modified.
    - **Completed Date** – Applies the filter based on the date when the survey was submitted.
- **Time Period** – Click an option in the drop-down list to filter the responses based on a certain time period. The following options are available:
    - **None** – Applies no time period filters and is selected by default.
    - **Today** – Shows the responses that are submitted today.
    - **Current Month** – Shows the responses for the current month, no matter the current date.
    - **Current Quarter** – Shows the responses for the current three months, no matter the current date.
    - **Current Year** – Shows the responses for the current calendar year, no matter the current date.
    - **Year to Date** – Shows the responses for the period starting January 1st of the current year up until the current date.
    - **Last Week** – Shows the responses for the past week.
    - **Last Month** – Shows the responses for the past month.
    - **Last Quarter** – Shows the responses for the past three months.
    - **Last Year** – Shows the responses for the past year.

To set the default values for the **Date Filters**, click the **Clear All Date Filters** link.

For the **Fill in the Blank** survey questions with date fields, you can apply date filters in the **Data Filter** section. In such case, the date filter options appear in the **Data Filter** section.



The Date Filter section

Other

In the **Other** section, the following options are available:

- **Only show completed responses** – Include only the complete responses while creating a report so that the report covers all the valid responses.
- **Logged in User Filter** – Include data for the currently logged in user only. This option is available only for the surveys with the **Organization External ID** or **Employee External ID** questions. You can add a report element with the applied logged in user filter to dashboard and view the

data filtered accordingly. If you share the filtered report or report element with other users, they will view only the data available for them according to the logged in user filter.

> The **Embed Report Element** option is not available for the report elements that are filtered by logged in user.

- **Include data from deleted panelists** – Include data from deleted panelists in the report calculations. This option is available only for the profile reports.

Organization

In the **Organization** section, you can set the filter based on the organization of which you are a member. This section shows up in the **Filter Report Data** dialog box only for the reports based on the surveys that contain the **External ID System Questions** option.

Filter single report element

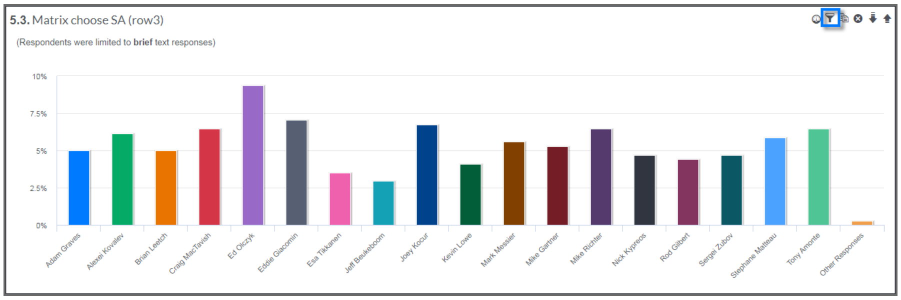
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > move the pointer over a report element > icon.

OR

Report & Analyze tab > **Project Reports** tab > select a survey that has received responses > **Analyze** tab > **Reports** page > move the pointer over a report element > icon.

You can view the certain results for a single report element. The data filter is based on questions, columns, or profile data. You can access the report element filter by clicking the **Filter** icon in the right pane of the report designer.



The Filter icon in the report designer

In the **Filter Element Data** dialog box, you can define the filter criteria for the single report element.

The following options are available:

- **Report Filter** – This option applies the report data filter to the single report element.
- **No Filter** – This option does not apply any filters to the report element.
- **Custom Filter** – This option applies the custom filter to the single report element.

  You can define the custom filter by clicking the **Add Another Criteria** link.

If your survey contains the **Organization External ID** or **Employee External ID** questions, you can select the **Logged In User Filter** option to include the data only for the currently logged in user. You can add a report element with the applied logged in user filter to dashboard and view the data that is filtered accordingly. If you share the filtered report element with other users, they will view only the data available for them according to the logged in user filter.

> The **Embed Report Element** option is not available for report elements that are filtered by logged in user.

In the **Data Filter** section, you can define the filtering criteria based on your report data by clicking the **Add Another Criteria** link.

> For more information, see Filters, page 723.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. Hover over the report element, and then click the **Filter** icon.
5. In the **Data Filter** dialog box, select the filter that you want to apply to your report element and define the filter criteria, if required.
6. Click **OK**.

Displayed Values panel

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **Displayed Values** panel.

OR

Report & Analyze tab > **Project Reports** tab > select a survey that has received responses > **Analyze** tab > **Reports** page > **Displayed Values** panel.

You can set the additional properties within your report to include the **Rows Per Page**, **ID column**, and **Display Newest Responses First** options.

- **Rows Per Page** – Enter in the text box a number that designates the number of rows that you want to display per page. To confirm the action, click **Apply All**.
- **ID Column** – Select the **ID Column** check box, to display the ID column in your report. The ID column represents the unique identifier for a particular respondent. When you select this check box, and then click **Apply All**, this column is displayed within your report. You can click the red ID number within the ID column and view the response record for that particular participant.
- **Display Newest Responses First** – Select the **Display Newest Responses First** check box, to display the newest responses from your survey in your report. To verify the action and confirm your request, click **Apply All**.

Report elements status messages

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one that contains data set information.

You can view the data set updates information for the report elements that are based on the data sets.

Data is unavailable in a report element based on data set information in the following cases:

- Filters that filter out all the data are applied.
- The data is not processed yet.

When you publish or republish the data set, it takes some time for the report elements to be updated. In such case, the **No Data Available** message appears for the report element body. Additionally, the following message appears at the top of the report element:

The requested data is being recompiled from scratch. This may take some time. Thank you for your patience.

If the data set is in the **Processing** status, it takes some time for the report elements based on the data set to be updated. In such case, the message is the following:

Processing, please check back shortly.

If the data points that are used in your report elements have new answers, the report element shows the existing answers in the report element and the message is the following:

Additional responses have been received but are pending processing. Chart will be updated shortly.

Use Element Hover Controls functionality

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > report designer.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > report designer.

You can add your report elements to the dashboard, filter, copy, delete, move up, or move down them by using the **Element Hover Controls** feature.

Copy, paste, and delete report element

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > **Reports** page, and then create a new report or open an existing one.
4. Hover your pointer over a report element.
5. To copy a report element, click the icon.
6. To insert a copy of the report element, click the **Paste** button .
7. To delete the report element, hover your pointer over a report element, and then click the icon.

Move report element up and down

Procedure

1. Hover your pointer over a report element.
2. To move a report element up, click the icon.
3. To move a report element down, click the icon.

If a **Move Up** or **Move Down** icon appears dimmed, you cannot move the element up or down because the element you have selected is at the top or bottom of the report section.

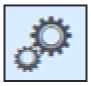
Advanced chart properties

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add a report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add a report element.

You can use the advanced chart properties to customize your chart in a more detailed way by clicking the  icon.

The following options are available:

- Chart Values
- Series Text
- X-Axis Series
- Y-Axis Series
- Axis Labels

Chart Values

You can enter the minimum and maximum values for your chart into the corresponding text boxes by clicking the **Chart Values** tab. If you do not provide any values, the default values are applied to the chart.

To cancel changes, click **Reset**.

Series Text

You can edit the series labels for your data to fit the text within the chart by clicking the **Series Text** tab.

On the **Series Text** tab, the following columns are available :

- **Original Label** – The original labels of the values that are displayed by the report element. The set of values depends on the selected element type.
- **Custom Label** – Edit the series labels by entering your own text into the text boxes to the right of the corresponding original label. Custom labels are truncated to 30 characters by design. If you do not provide any values, the default values are applied to the chart.
- **Show Value** – Select the check box next to the chart value which you want to display in your report element. By default, this option is active.

To cancel changes, click **Reset**.

X-Axis Series

You can edit the series labels for your data to fit the text within the chart by clicking the **X-Axis Series** tab.

On the **X-Axis Series** tab, the following columns are available:

- **Original Label** – The original labels of the values displayed by report element. The set of values depends on the selected element type.
- **Custom Label** – Edit the series labels by entering your own text into the text boxes to the right of the corresponding original label. Custom labels are truncated to 30 characters by design. If you do not provide any values, the default values are applied to the chart.
- **Show Value** – Select the check box next to the chart value which you want to display in your report element. By default, this option is active.

To cancel changes, click **Reset**.

This tab is available only for the **Cross-tab Chart** report element.

Y-Axis Series

You can edit the series labels for your data to fit the text within the chart by clicking the **Y-Axis Series** tab.

On the **Y-Axis Series** tab, the following columns are available:

- **Original Label** – The original labels of the values displayed by report element. The set of values depends on the selected element type.
- **Custom Label** – Edit the series labels by entering your own text into the text boxes to the right of the corresponding original label. Custom labels are truncated to 30 characters by design. If you do not provide any values, the default values are applied to the chart.
- **Show Value** – Select the check box next to the chart value which you want to display in your report element. By default, this option is active.

To cancel changes, click **Reset**.

This tab is available only for the **Cross-tab Chart** report element.

Axis Labels

You can define the axis labels for your chart by clicking the **Axis Labels** tab. You can enter the X- and Y-axis labels into the corresponding text boxes.

To cancel changes, click **Reset**.

To return to the standard view, click the **Chart** icon.

Advanced properties for report elements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

OR

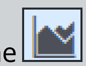
Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel.

You can customize your report element in a more detailed way by using the advanced properties.

The following options are available:

- **Row Labels**
- **Column Labels**

This option is available for the **Summary Table**, **Summary of Means**, **Cross-tab**, **Top Box**, **Top Box Cross-tab**, **Trend Table**, and **Frequency Table** report elements.

To return to the standard view, click the  icon.

Row Labels

Use the **Row Labels** tab to edit or hide the row labels for your table.

On the **Row Labels** tab, the following columns are available:

- **Original Label** – The original labels of the values displayed by report element. The set of values depends on the selected element type.
- **Custom Label** – Edit the row labels by entering your own text into the text boxes to the right of the corresponding original label. Custom labels are truncated to 30 characters by design. If you do not provide any values, the default values are applied to the table.
- **Show Row** – Select the check box next to the table row which you want to display in your report element. By default, this option is active.

To set the row labels to the original survey values, click **Reset**.

Column Labels

Use the **Column Labels** tab to edit or hide the column labels for your table.

On the **Column Labels** tab, the following columns are available:

- **Original Label** – The original labels of the values displayed by report element. The set of values depends on the selected element type.
- **Custom Label** – Edit the column labels by entering your own text into the text boxes to the right of the corresponding original label. Custom labels are truncated to 30 characters by design. If you do not provide any values, the default values are applied to the table.

- **Show Column** – Select the check box next to the table column which you want to display in your report element. By default, this option is active.

To set the column labels to the original survey values, click **Reset**.

Chart labels improvements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > add the **Trend Chart** or **Frequency Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > add the **Trend Chart** or **Frequency Chart** report element.

The chart labels in the **Trend Chart** and **Frequency Chart** report elements have the following improvements:

- The limit of characters for the chart labels is increased from 15 characters to the largest value available for the chart.
- If the label contains more characters than you set in the **Chart Appearance** properties menu, it is abbreviated and followed by an ellipsis. The label text is shown in a tooltip when you hover over the chart.
- If the label contains a large amount of text, it wraps to show appropriately on the chart.

To add a line break to the series text, access the chart advanced properties, and then insert "/r" in the text.

Displaying chart columns in different color

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > create a new report or open an existing one > add the **Trend Chart** or **Frequency Chart** report element.

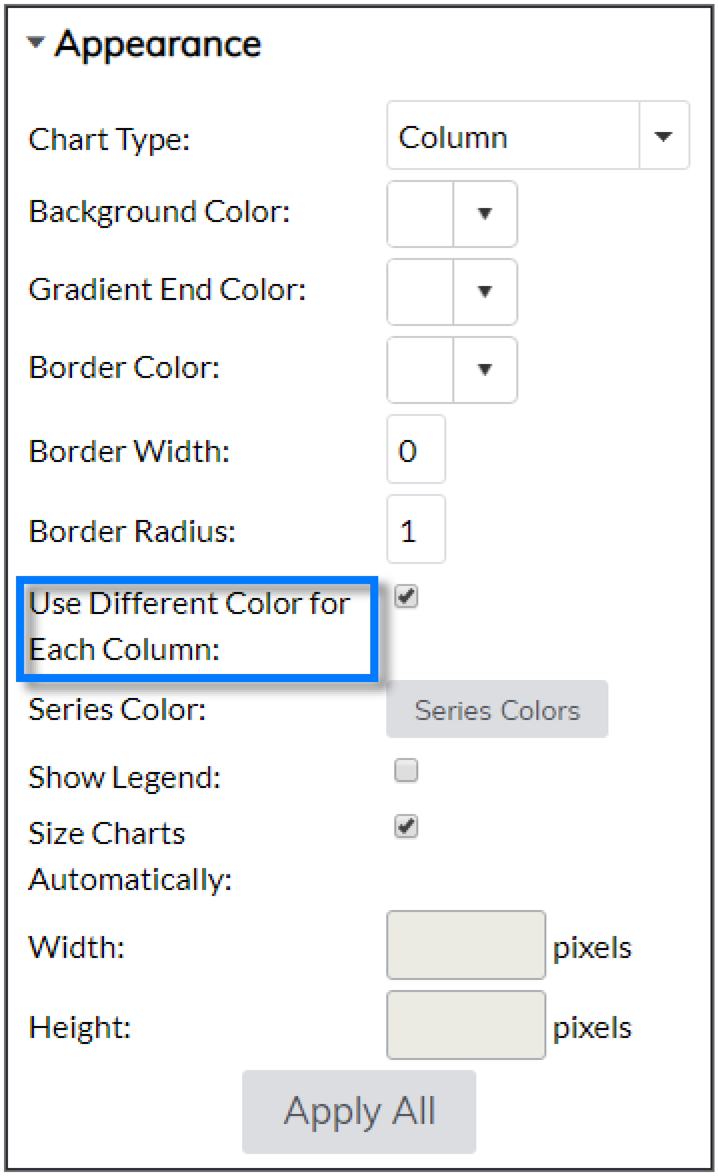
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > add the **Trend Chart** or **Frequency Chart** report element.

You can select the **Use different color for each bar (column)** check box for the **Frequency Chart** and **Trend Chart** report elements to display each bar or column in the chart in different color.

This option is available only for the **Column** and **Bar** chart types that render all bars or columns in the same color.

When the **Use different color for each bar (column)** option is activated, the color series that are used by the report theme is applied to the report element. You can view and change the selected color series by using the **Series Palette** option.



The Use Different Color for Each Column check box

Chapter 12

Net Score

Topics

Net Score overview

Net score is used to run the customer satisfaction surveys. Basically, every company's customers can be divided into three groups: Promoters, Passives, and Detractors. By asking a question–How likely is it that you would recommend us to a friend or colleague?–you can track these groups and get a clear measure of your company's performance through its customers' eyes. Customers respond on a 0-to-10 point rating scale and are categorized as follows:

- **Promoters (score 9-10)** are loyal customers who recommend your company to other people.
- **Passives (score 7-8)** are satisfied but unenthusiastic customers who can buy the goods or services from your competitors.
- **Detractors (score 0-6)** are unhappy customers who can damage your brand.

Related topics

Net Score in Top Box

Navigation

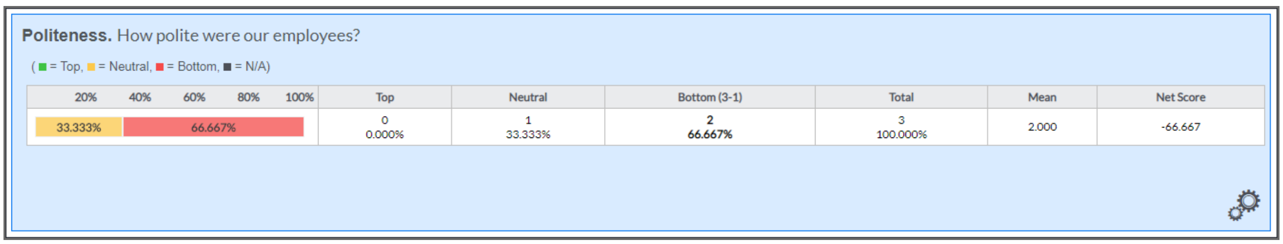
Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one with the **Top Box** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one with the **Top Box** report element.

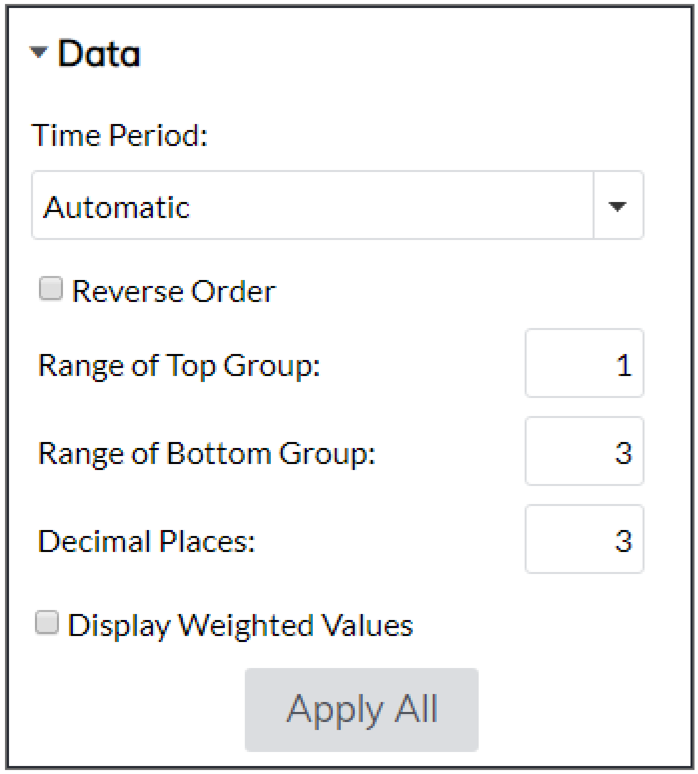
You can add the net score calculation to the **Top Box** report element. With the net score calculation, you can see the difference between the top and bottom items of a rating scale. To apply the net score to the **Top Box** report element, select the **Net Score** check box in the **Displayed Values** section.

You can use any scale-based question as a source for the net score calculation, for example: "How polite were our employees?". The responses are divided into three groups: **Top** (score 9-10), **Neutral** (score 7-8), and **Bottom** (score 0-6). The percentage of the **Bottom** group is then subtracted from the percentage of the **Top** group to get a net score.



The Net Score calculation in the Top Box report element

You can set the range of the **Top** and **Bottom** groups in the Data properties menu.



The Data properties menu

- **Range of Top Group** – Use this text box to define the number of choice items to be combined when generating the top group calculation. The default is set to the top 2. For example, on a ten-point scale all responses of 9 and 10 are combined.
- **Range of Bottom Group** – Use this text box to define the number of choice items to be combined when generating the bottom group calculation. The default is set to the bottom 6. For example, on a ten-point scale all responses of 1, 2, 3, 4, 5, and 6 are combined.

The range of **Top** and **Bottom** groups cannot be negative or overlap.

Net Score in Top Box Cross-tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one with the **Top Box Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one with the **Top Box Cross-tab** report element.

You can add the net score calculation to the **Top Box Cross-tab** report element. With the net score calculation, you can see the difference between the top and bottom items of a rating scale. To apply the net score to the **Top Box Cross-tab** report element, select the **Net Score** check box in the **Displayed Values** section.

For more information on the net score, see Net Score overview, page 740.

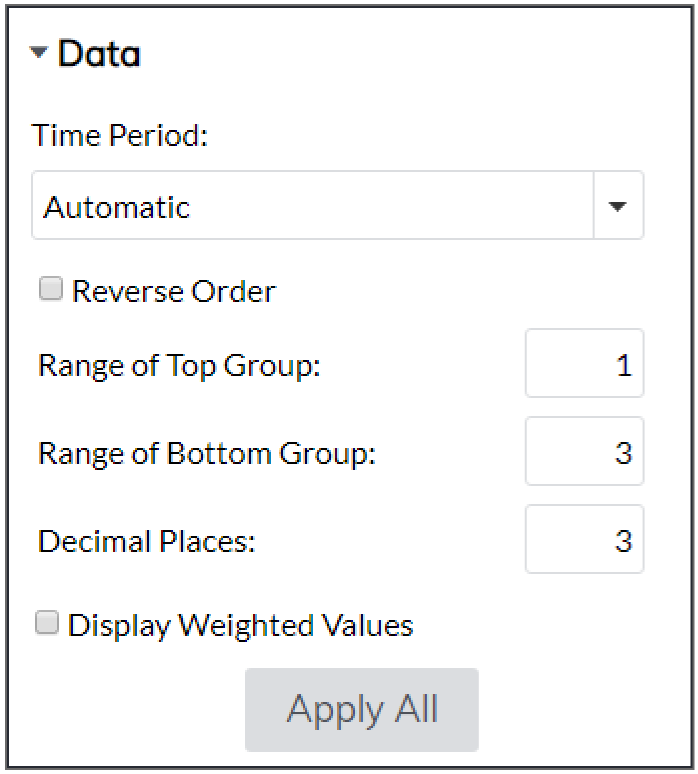
You can use any scale-based question as a source for the net score calculation, for example: "How likely is it that you would recommend us to a friend or colleague?". The responses are divided into three groups:

- **Top** (score 9-10)
- **Neutral** (score 7-8)
- **Bottom** (score 0-6)

Net Score = Top Group – Bottom Group

The net score is calculated by subtracting the percentage of the bottom group from the percentage of the top group.

The default values of the top and bottom groups are set to 18% and 62% of the general number of response choices respectively. You can set the range of the top and bottom groups in the **Data** section. The range of top and bottom groups cannot be negative or overlap.



The Data properties menu

- **Range of Top Group** – In this text box, you can specify the number of choices to be used for defining the top group. For example, if the top group range is set to 2, all responses of 9 and 10 on a 0-10 scale are included in the top group.
- **Range of Bottom Group** – In this text box, you can specify the number of choices to be used for defining the bottom group. For example, if the bottom group range is set to 7, all responses of 0, 1, 2, 3, 4, 5, 6, and 7 on a 0-10 scale are included in the bottom group.

Net Score in Trend Table

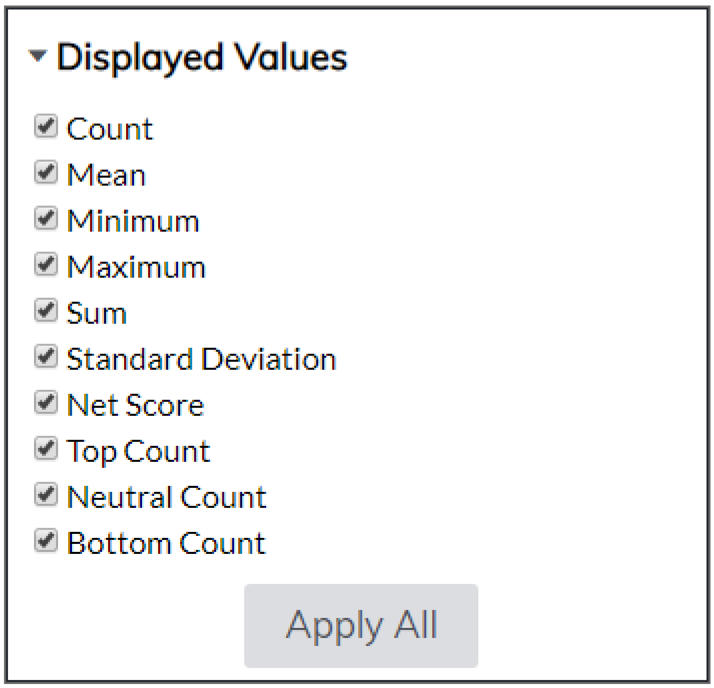
Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one with the **Trend Table** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one with the **Trend Table** report element.

You can add the net score calculation to the **Trend Table** report element. With the net score calculation in the trend table, you can see the customers' satisfaction over the specified time periods. To apply the net score to the **Trend Table** report element, select the **Net Score** check box in the **Displayed Values** section.

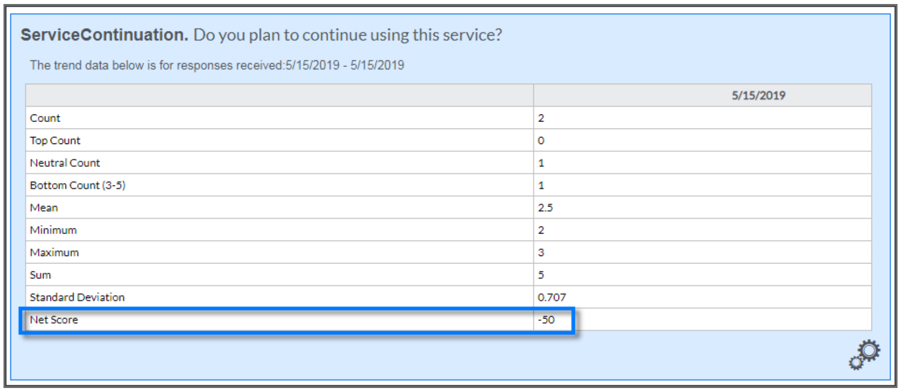


The Displayed Values properties menu

You can use any scale-based question as a source for the net score calculation, for example: "Do you plan to continue using this service?". The responses are divided into three groups:

- **Top** (score 9-10)
- **Neutral** (score 7-8)
- **Bottom** (score 0-6)

The percentage of the **Bottom** group is then subtracted from the percentage of the **Top** group to get a **Net Score**.



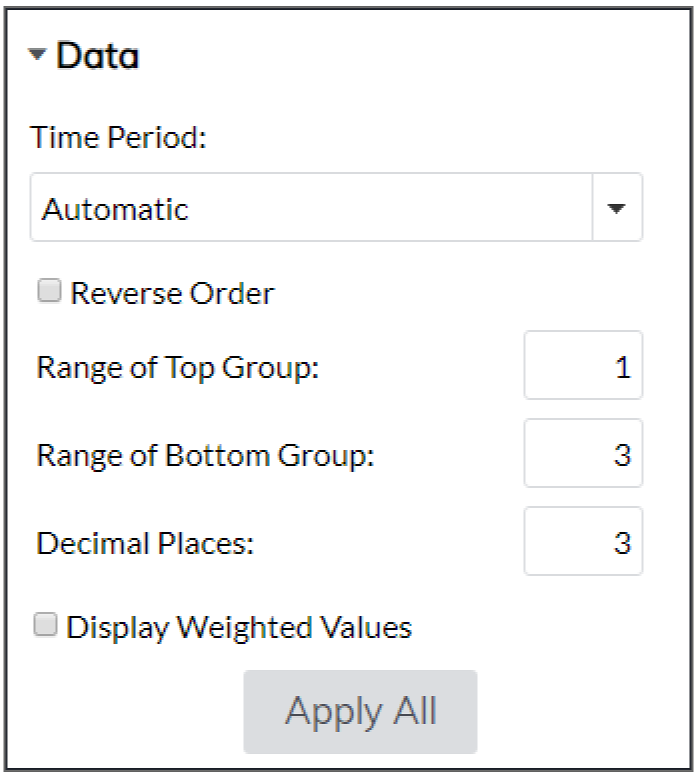
ServiceContinuation. Do you plan to continue using this service?

The trend data below is for responses received:5/15/2019 - 5/15/2019

	5/15/2019
Count	2
Top Count	0
Neutral Count	1
Bottom Count (3-5)	1
Mean	2.5
Minimum	2
Maximum	3
Sum	5
Standard Deviation	0.707
Net Score	-50

The Net Score calculation in the Trend Table report element

The default values of the **Top** and **Bottom** groups are set to 18% and 62% of the general number of response choices respectively. You can set the range of the **Top** and **Bottom** groups in the Data properties menu.



The Data properties menu

- **Range of Top Group** – Define the number of choice items to be combined when generating the top group calculation. For example, if the top is set to 2 on a ten-point scale, all responses of 9 and 10 are combined.

- **Range of Bottom Group** – Define the number of choice items to be combined when generating the bottom group calculation. For example, if the bottom is set to 6 on a ten-point scale, all responses of 1, 2, 3, 4, 5, and 6 are combined.

The range of **Top** and **Bottom** groups cannot be negative or overlap.

Net Score in Trend Chart

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one with the **Trend Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one with the **Trend Chart** report element.

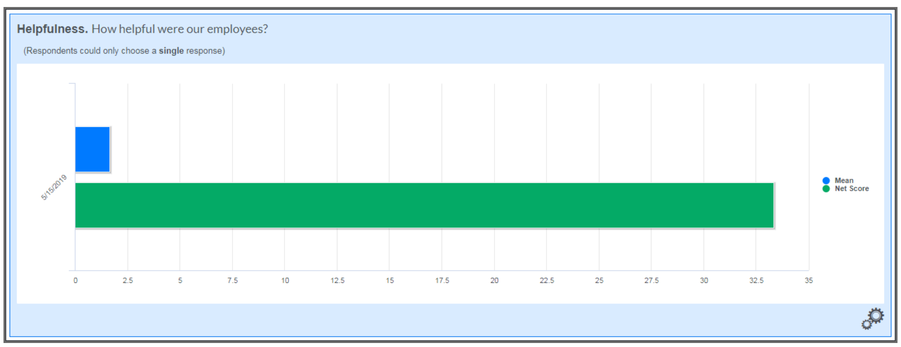
You can view the net score in the **Trend Chart** report element and track the customer satisfaction over the specified time periods. To apply the net score to **Trend Chart**, select the **Net Score** check box in the **Displayed Values** section.

You can use any scale-based question as a source for the net score calculation, for example: "How helpful were our employees?". The responses are divided into three groups:

- **Top** (score 9-10)
- **Neutral** (score 7-8)
- **Bottom** (score 0-6)

The net score is calculated by subtracting the percentage of the bottom group from the percentage of the top group.

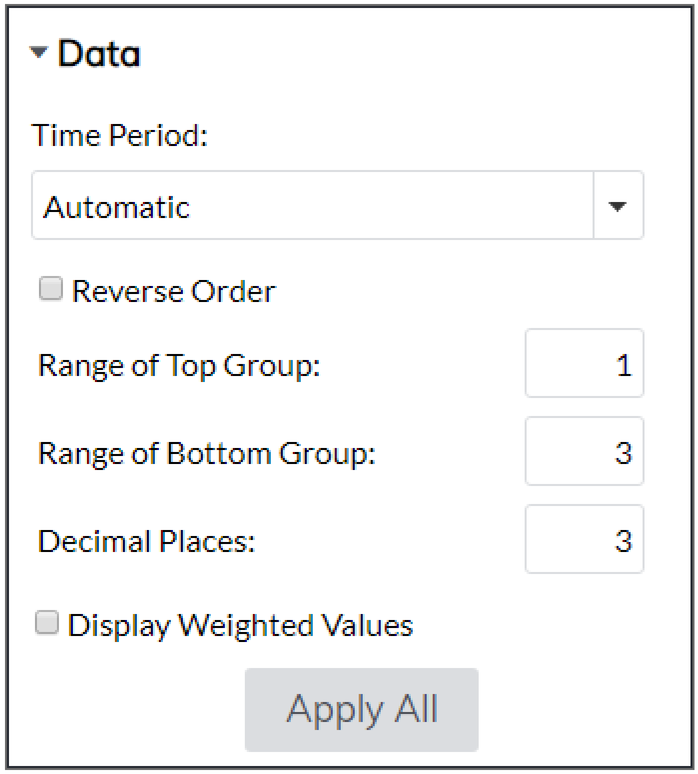
Net Score = Top Group – Bottom Group



The net score in Trend Chart

> Net score is available for all chart types, including bar, column, and time series. For more information on the net score, see Net Score overview, page 740.

The default values of the top and bottom groups are set to 18% and 62% of the general number of response choices respectively. You can set the range of the top and bottom groups in the **Data** section. The range of top and bottom groups cannot be negative or overlap.



The Data properties menu

- **Range of Top Group** – In this text box, you can specify the number of choices to be used for defining the top group. For example, if the top group range is set to 2, all responses of 9 and 10 on a 0-10 scale are included in the top group.
- **Range of Bottom Group** – In this text box, you can specify the number of choices to be used for defining the bottom group. For example, if the bottom group range is set to 7, all responses of 0, 1, 2, 3, 4, 5, 6, and 7 on a 0-10 scale are included in the bottom group.

Net Score in Statistics Map

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one with the **Statistics Map** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one with the **Statistics Map** report element.

With the **Net Score** functionality, you can determine the customer loyalty and satisfaction with your products and services. If you want to view the statistics map of your customer attitudes, apply the net score to the **Statistics Map** report element.

You can use any scale-based question as a source for the net score calculation. The responses are divided into three groups:

- **Top** (score 9-10)
- **Neutral** (score 7-8)
- **Bottom** (score 0-6)

The net score is calculated by subtracting the percentage of the bottom group from the percentage of the top group.

The default values of the top and bottom groups are set to 18% and 62% of the total number of response choices respectively.

You can set the range of the top and bottom groups in the **Data** section:

- **Range of Top Group** – Define the number of choice items to be combined when generating the top group calculation. The default value is set to 18%. The top map calculation can be set to 1, 2, or 3 choices. For example, if the top is set to 2 on a ten-point scale, all responses of 9 and 10 are combined.
- **Range of Bottom Group** – Define the number of choice items to be combined when generating the bottom group calculation. The default value is set to 62%. The bottom map calculation can be set to 1, 2, or 3 choices. For example, if the bottom is set to 6 on a ten-point scale, all responses of 1, 2, 3, 4, 5, and 6 are combined.

The range of **Top** and **Bottom** groups cannot be negative or overlap.

Chapter 13

Cross-tab Analysis

Topics

Cross-tab Analysis report

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **New** menu > click **Cross-tab Analysis Report**.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **New** menu > click **Cross-tab Analysis Report**.

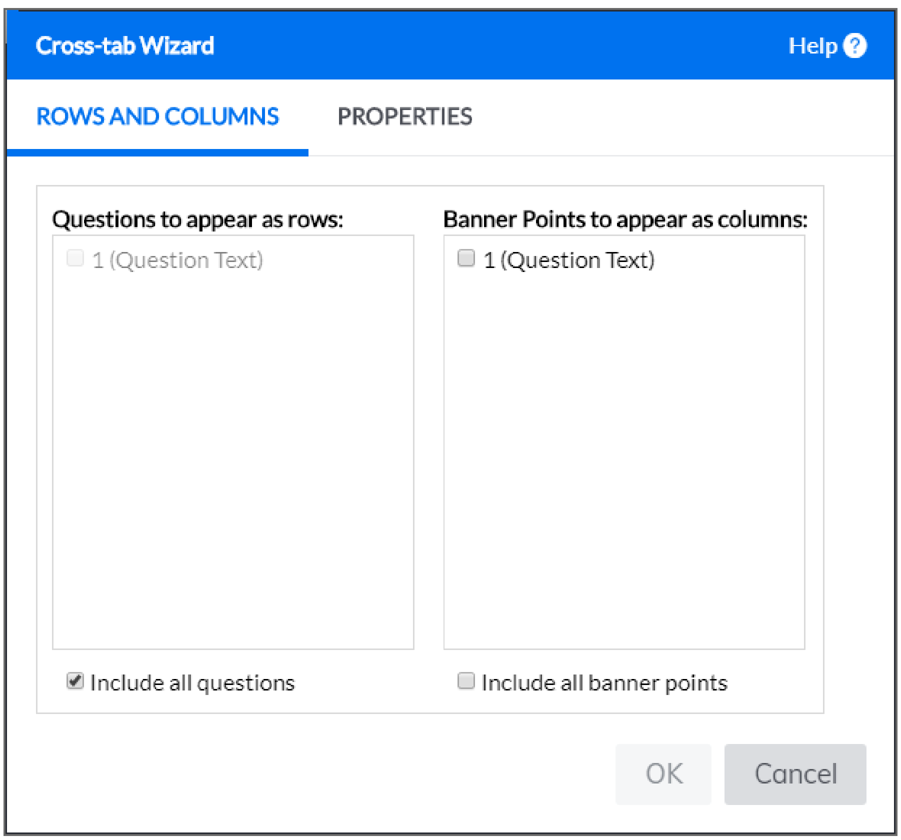
You can create a **Cross-tab Analysis** report showing a cross-tabulation of multiple variables at the same time.

When you create a new **Cross-tab Analysis** report, you can use the following tabs:

- Rows and Columns
- Properties

Rows and Columns

On the **Rows and Columns** tab, you can select the questions for columns and rows of your **Cross-tab Analysis** report. See image and description below.



The Rows and Columns tab

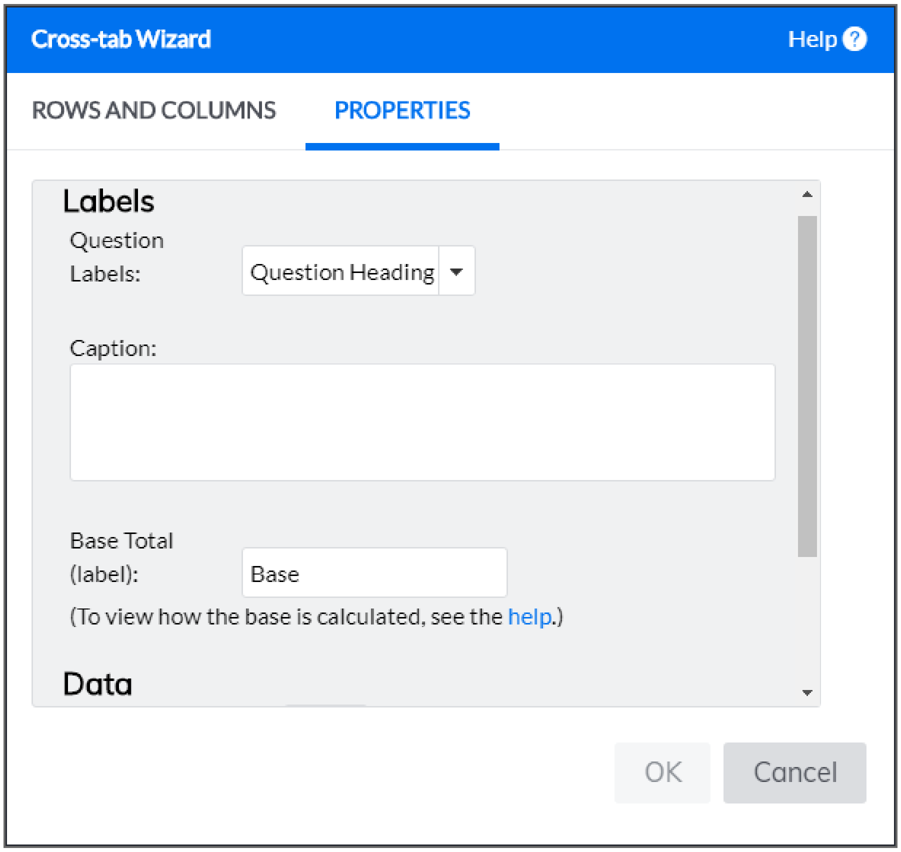
- **Questions to appear as rows** – Define the row question for the cross-tabulation.

  For the rows, you can use the following question types:
  - Multiple Choice: Choose One
  - Multiple Choice: Choose One with Image
  - Multiple Choice: Choose Many
  - Multiple Choice: Choose Many with Image
  - Matrix with a "Multiple Choice: Choose One" question as a side
  - Matrix with a "Multiple Choice: Choose Many" question as a side
  - Rank Order
  - Drag & Drop Rank Order
  - Scrolling Matrix
  - Scale Slider
  - Fill in the Blank with the "Numbers" input type
- **Include all questions** – Include all survey questions as rows for the cross-tabulation (selected by default).
- **Banner Points to appear as columns** – Define the column question for the cross-tabulation.

  For the columns, you can use the following question types:
  - Multiple Choice: Choose One
  - Multiple Choice: Choose One with Image
  - Multiple Choice: Choose Many
  - Multiple Choice: Choose Many with Image
  - Matrix with a "Multiple Choice: Choose One" question as a side
  - Matrix with a "Multiple Choice: Choose Many" question as a side
  - Rank Order
  - Drag & Drop Rank Order
  - Scrolling Matrix.
  - Scale Slider
- **Include all banner points** – Include all survey questions as columns for the cross-tabulation.

Properties

The **Properties** tab contains the **Labels** and **Data** sections, both providing a number of customization options.



The Properties tab

- **Question Labels** – Select the question label for your report. The available options are **Question Heading** and **Report Heading**.
- **Caption** – Type your text in this edit box to show a brief description below your report.
- **Base Total (label)** – Edit the label for total amount of response choices selected by respondents. **Base** is a default label. If you do not provide any value, the default value is applied to the report.
- **Significance Testing** – Turn on or turn off the significance testing on the **Choose One** variables by selecting the **On** or **Off** option correspondingly. **Off** is a default option.
- **Confidence Interval** – Select the confidence interval for significance testing. The available options are **90%**, **95%** and **99%**.

> The **Confidence Interval** option is only available when you enable the significance testing for your **Cross-tab Analysis** report.

- **Displayed Values** – Select the response data appearance in your report. The following options are available:
  - **Numbers and Percentages** – This option shows both percentage and number of the response choices selected by respondents. The response choices number appears above the percentage.
  - **Percentages only** – This option shows only percentage of the response choices selected by respondents.

  - **Numbers only** – This option shows only number of the response choices selected by respondents.
- **Decimal Places** – Define the decimal places for the values in the report. The available options are **0**, **1**, **2**, and **3**.

To apply changes that you made to the report properties, click **OK**.

Viewing the Cross-tab Analysis Report

If your **Cross-tab Analysis** report contains more than 52 columns, it shows on the multiple tabs.

The response data of one question are shown on the same tab. For example, Question 1 has 20 response choices, Question 2 has 30 response choices, and Question 3 has 8 response choices, then Tab 1 contains all responses for Questions 1 and 2 (which add up to 50), and all 8 responses for Question 3 appear on the Tab 2.

> The public report generation does not currently support the Cross-tab Analysis report types. The Cross-tab Analysis report types are now disabled for the public reports.

Exporting the Cross-tab Analysis Report

You can export the **Cross-tab Analysis** report to the Microsoft Excel file to view the results outside the EFM application. In the Microsoft Excel file, each tab is placed on a separate worksheet.

You can export the report by using the **Download Report** menu.

> For more information about how to download the reports, see Downloading reports, page 1012.

Create a Cross-tab Analysis Report

Procedure

1. On the **Reports** page, on the **New**, click **Cross-tab Analysis**.
2. In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report.
3. Click **OK**.
4. In the **Cross-tab Wizard** dialog box, on the **Rows and Columns** and **Properties** tabs, define report properties.
5. Click **OK**.

Significance testing

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports** page > **New** menu > click **Cross-tab Analysis Report**.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **New** menu > click **Cross-tab Analysis Report**.

You can perform the significance testing on the Choose One (including the Matrix sides) variables by using the **Cross-tab Analysis** report. You can use the significance testing to compare whether the proportion of respondents in one column is significantly different from the proportion in the other column within the single variable. To manage the significance testing options, access the **Properties** tab in your **Cross-tab Analysis** report.

- **Significance Testing** – Turn on or turn off the significance testing on the Choose One variables by selecting the **On** or **Off** option correspondingly. **Off** is a default option.
- **Confidence Interval** – Select the confidence interval for significance testing. The available options are **90%**, **95%** and **99%**. **95%** is a default option.

For the steps on how to create the **Cross-tab Analysis** report, see Cross-tab Analysis report, page 752.

When you perform the significance testing, the reference letters show as the column ID in the column headers below the column titles. For the columns 1-26, lowercase English letters are shown (a, b, c, ..., y, z), and, for the columns 27-52, uppercase English letters are shown (A, B, C, ..., Y, Z). If the difference between the columns is significant, the ID of one column shows under the response data of the other column. See image and example below.

If the number of degrees of freedom (responses) is less than 30, no significance testing is calculated and published, and a footnote on the table states **Base too small for significance testing between columns [a-b, a-c, b-c]**. If the number of degrees of freedom is less than 100, the significance testing is calculated and published, and a footnote on the table states **Caution – small bases for columns [c-d, c-e, c-f**]. Depending on the selected confidence interval, a footnote showing the chosen risk level appears on the table. For example, if you select the 95% confidence interval, a footnote states **Proportions: Columns Tested (5% risk) [a-c, b-c, a-c]**.

The significance testing is not saved if you close the report. When you open the saved report later, the previous test results are cleared. You can perform a new test if you want.

You can also export the significance testing results to the Microsoft Excel file format as a part of the **Cross-tab Analysis** report to view the test data outside the product.

Significance testing calculation

The application uses the same significance test calculations as described in Quantum's Special T statistics (Quantum volume 3, Section 7) for the T-test on column proportions. This example compares the values of the proportions in two columns of a table. For each of the two columns (k=1, 2), the sample proportions are defined as:

P1 = Cell frequency 1 / Base 1

P2 = Cell frequency 2 / Base 2

Population variance is calculated as:

P = (Cell frequency 1 + Cell frequency 2) / (Base 1 + Base 2)

The variable T is calculated as:

T = (P1 – P2) / Sqrt (p x (1-p) x (1 / Base 1 + 1 / Base 2) / (1 – 1 / (Base 1 + Base 2)))

Procedure

1. On the **Reports** page, on the **New** menu, click **Cross-tab Analysis Report**.
2. In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report.
3. Click **OK**.
4. Define your **Cross-tab Analysis** report properties.
5. On the **Properties** tab, on the **Significance Testing** menu, select the **On** option.
6. On the **Confidence Interval** menu, select the confidence interval for significance testing.
7. Click **OK**.

Enable significance testing for a workgroup

1. Go to the **Configuration** tab > **General** tab.
2. In the **Workgroup Setup** section, select the **Enable significance testing in Cross-tab Analysis** check box.
3. Click **Save Setup**.

Apply weighting to the Cross-tab Analysis report

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **Design** tab > **Analyze** tab > **Weighting** side tab > **Weighting** page > add weighting criteria > **Reports** page > **New** menu > **Cross-tab Analysis Report** option > **Rows and Columns** tab > **Properties** tab > **Display Weighted Values** check box.

You can apply previously defined weighting scheme to the **Cross-tab Analysis** report. When you name a report, you can apply weighting to it by selecting the "Apply a weighting scheme to the report" check box in the **Name Your Report** dialog box.

For the steps on how to create the **Cross-tab Analysis** report, see Cross-tab Analysis report, page 752.

When weighting is applied to the **Cross-tab Analysis** report, the corresponding notification is shown in the upper-left corner of the window.

You can also turn on or turn off weighting for the **Cross-tab Analysis** report by selecting the **Display Weighted Values** check box on the **Properties** tab. If weighting is activated, only weighted values are displayed in the **Cross-tab Analysis** report.

The **Display Weighted Values** check box is only available if you have a weighting scheme defined. For more details about how to define a weighting scheme, see Weighting overview, page 1016.

If you export the **Cross-tab Analysis** report that contains weighting scheme to the Microsoft Excel file format, the weighting scheme also shows in the exported report.

The Cross-tab Analysis Calculation Example

Gender	Weight	Q1	Q2
Male	0.750	2	4
Male	0.750	3	5
Male	0.750	4	3
Male	0.750	5	3
Male	0.750	4	1
Female	1.100	1	3
Female	1.100	3	4
Female	1.100	4	3

Gender	Weight	Q1	Q2
Female	1.100	2	5
Female	1.100	1	2

Unweighted

	Q2	Q2	Q2	Q2	Q2
Q1	1	2	3	4	5
1	0	1	1	0	0
2	0	0	0	1	0
3	0	0	0	1	1
4	1	0	2	0	0
5	0	0	1	0	1

Weighted

	Q2	Q2	Q2	Q2	Q2
Q1	1	2	3	4	5
1	0	1.1	1.1	0	0
2	0	0	0	0.75	0
3	0	0	0	1.1	0.75
4	0.75	0	1.85	0	0
5	0	0	0.75	0	1.1

Procedure

1. On the **Weighting** page, define a weighting scheme.
2. Navigate to the **Reports** page.
3. On the **Reports** page, in the **New** menu, click the **Cross-tab Analysis Report**. The opens.
4. In the **Name Your Report** dialog box, enter the name for your report.
5. Click **OK**.
6. On the **Rows and Columns** tab, select the questions and banner points for your report.
7. Click the **Properties** tab.

8. Select the **Display Weighted Values** check box.
9. Click **Save**.

Cross Tab Analysis Base Total Calculation

Overall bases represent the number of respondents who answered the question. Answering the question is counted by selecting at least one choice or entering a value for that question.

The row bases (this is the green column in the grid) represent the number of respondents who selected that choice or entered that value.

The column bases (this is the green row associated with each row question) represent the number of respondents who both selected the column choice and answered the row question.

Question Type	Base Calculation
• Multiple Choice: Choose One • Matrix with a "Multiple Choice: Choose One" side • Matrix with a "Fill in the Blank" question with a "Real Number" input type as a side • Matrix with a "Fill in the Blank" question with a "Whole Number" input type as a side • Scrolling Matrix • Scale Slider • Fill in the Blank with a "Whole Number" input type • Fill in the Blank with a "Real Number" input type • Rank Order • Drag and Drop Rank Order	The base equals the total number of respondents who answered the question.
• Multiple Choice: Choose Many • Matrix with a "Multiple Choice: Choose Many" side	The base equals the total number of respondents who selected any choice in the question.
• Essay • Fill in the Blank with a "Text" input type • Fill in the Blank with a "Dates" input type • Fill in the Blank with a "IDs & Phone Numbers" input type • Fill in the Blank with a "Postal Codes" input type	These question types are not supported in the **Cross-tab Analysis** report.

Prior to the October 29th 2011 update, bases for Multiple Choice: Choose Many and Matrix with a Multiple Choice: Choose Many side were calculated by tallying the total number of choices selected. The calculations for all other bases remain the same.

Chapter 14

Public Reports

Topics

Public reports

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Share** menu.

You can generate the report public link, paste the link into the email, and send the email to the user, whom you want to allow viewing a report. Thus users who do not have access to the product can view a report by clicking a report public link.

When the report public link is generated, Public Link appears in the **Reports** grid.

The theme of the original report is automatically applied to the public report. If you change the report theme for the original report, the public report updates immediately. Switch to the Web page showing the public report and refresh the page to see the updates.

Elements with logged-in user filtering cannot be shared publicly. They will be excluded from the public report.

In addition, you can secure the public report by password. If you set password for the public report, the lock icon shows next to Public Link on the **Reports** page.

If you delete the public shared report, the public link will no longer open this report and the **The public report you requested is not available at this time** message will appear.

Manage public reports

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Share** menu > **Make Report Public** option > **Share Public Report** dialog box.

You can allow users who do not have access to the product view a report by generating a report public link.

The public report generation does not currently support the Cross-tab Analysis report types. The Cross-tab Analysis report types are now disabled for the public reports.

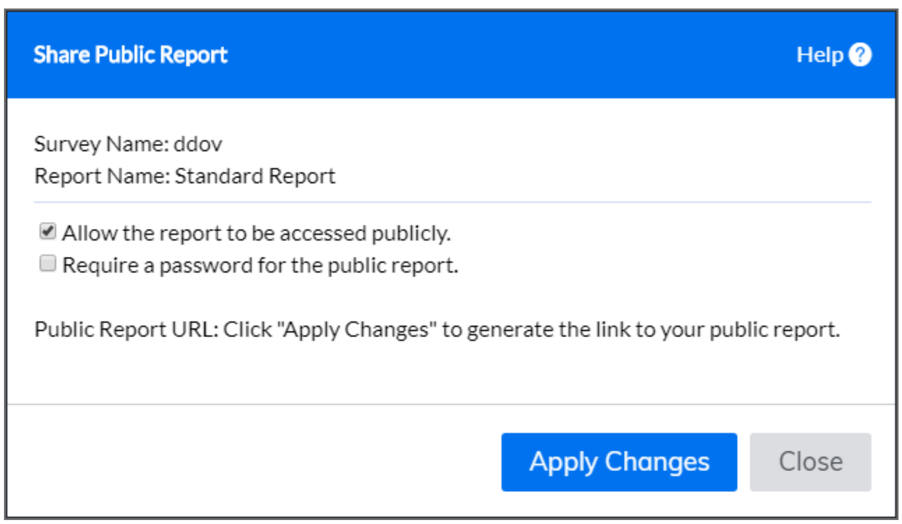
Generate a report public link

Procedure

1 On the **Reports** page, select a check box next to the report that you want to share.

2 On the **Share** menu, click **Make Report Public**.

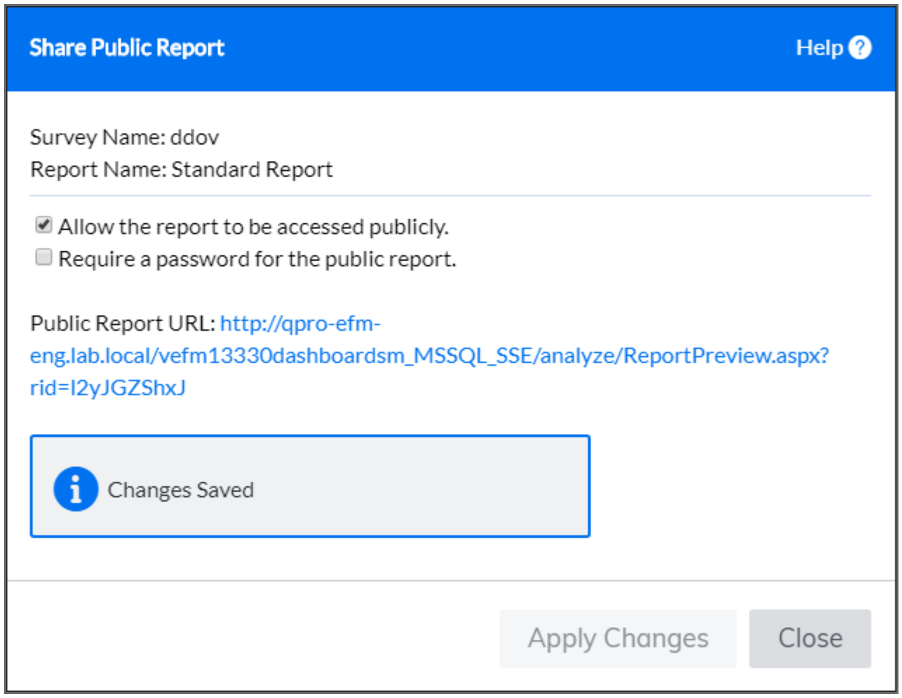
3 In the **Share Public Report** dialog box, select the **Allow the report to be accessed publicly** check box.



The Share Public Report dialog box

4 To set the password for accessing your public report, select the **Require a password for the public report** check box, and then type the password in the box.

5 To generate the report public link, click **Apply Changes** .



Generated report public link

6 Click **Close**.

> To stop report public sharing, clear the **Allow the report to be accessed publicly** check box. The report is no longer available for viewing by a report public link.

View public report protected by password

Procedure

1. Open an email that contains the report public link and password.
2. Click the generated report public link.
3. On the report access page, type the password for a public report in the **Password** box.
4. Click **Access Report**.

Enable public report for workgroup

Procedure

1. Go to **Configuration** tab > **General** tab.
2. Select the **Enable public report** check box.
3. Click **Save Setup**.

For the steps on how to enable public report based on the user role, see Public report–Role-based access, page 767.

Public report–Role-based access

Navigation

Administration tab > **Roles** tab.

Group administrator can control the workgroup members' access to public reports creation based on the user role set of permissions. You can enable public reports for a user by creating a new role or editing the existing ones.

For details on public reports, see the Public reports, page 763.

Activate public report for a user role

Procedure

1 Go to the **Administration** tab > **Roles** tab.
2 Click the name of the role that you want to edit.
3 On the **Edit Role** page, in the **Experience** section, select the **Public Report** check box.
4 Click **Save**.

For details on the user roles, see Roles, page 1378.

Adding public report link to widget

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Share** menu > **Make Report Public** option > open the report designer > add a report element > expand the **Embed Report Element** section > select the **Add link to public report** check box.

You can include a link to the public report in both the generated code snippet and element URL to allow users access the full public report while viewing the report element.

Procedure

1. Open a publicly shared report in the report designer.
2. Add a report element that you want to embed into a custom page.
3. Click the **Embed Report Element** section to expand it.
4. Click the **Generate Code** button.
   The code snippet and URL for the report element are generated.
5. Select the **Add link to public report** check box.
   Both the code snippet and URL are updated to include the link to the full public report.

> The **Add link to public report** check box appears after you share your report publicly.

6. Click within the text box with the URL to select the whole link, and then copy it.
7. Place the copied URL on the custom page.
   The report element with the link to the full public report appears.

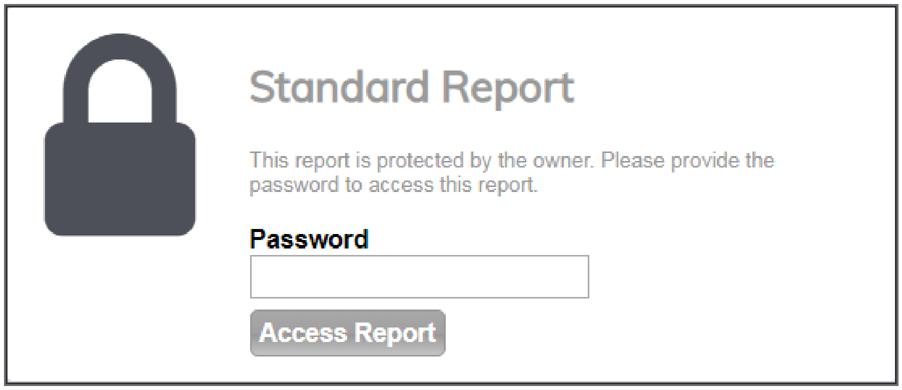
> For the steps on how to use the code snippet, see Embed Report Element, page 969.

When you select the **Add link to public report** check box, both the code snippet and element URL are regenerated immediately. However, the previously created widgets are not updated accordingly. You need to replace the code snippet and URL for these elements to create new widgets. If you stop the report public sharing, the link to the public report is no longer available.

> For details on the public reports functionality, see Public reports, page 763.

The link appears at the bottom of the report element in your widget. Click the link to access the full public report.

For the password protected public reports, the report access page appears after you click the public report link.



The report access page

To access the public report, enter the password provided by email.

Chapter 15

Report Element Types

Topics

Frequency Table

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Frequency Table** report element.

You can manage and customize your **Frequency Table** report element by using the following sections in the left pane:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

In the **Report Element** section of the **Frequency Table** report element, you can show or hide the question text, description, and caption.

The **Frequency Table** properties include the following sections:

- **Type** – The selected report element type.

  Question – The source question.
  You can select all question types except **Essay** and **Image Upload**. To change a question, use the **Question** menu.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type your text in the text box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section of the **Frequency Table** element, you can change the look and feel of the element.

The **Appearance** properties include the **Row** and **Header** sections, both providing a number of customizing properties:

- **Color** – Select the background color for the data or header rows.
- **Text Color** – Select the text color for data or header rows. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select in a list of web-compatible fonts for data and header text.
- **Font Size** – Select in a list of web-compatible font sizes for data and header text.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes that you made to all **Frequency Table** elements in your report, click **Apply All**.

Data

The **Data** section contains the following properties:

- **Sort Order** – Shows the order the values appear in the report element. The available options are **Original (Survey order)**, **Alphabetical Order**, and **By Count**. **Original (Survey order)** is a default value. Use the **Sort Order** menu to change the order. The frequency table updates to show data in the newly selected order.

  The **Original (Survey Order)** option is unavailable if the **Frequency Table** report element uses a file import column.

  To view the values in reverse order and group the individual responses rather than treating them as a separate item on the table, select the **Invert Sort Order** and **Group unique responses into 'Other Responses'** check boxes correspondingly.
- **Number Formatting** – Shows a set of text boxes that you can use to define the decimal places for the values that the frequency table shows.

The set of properties depends on the question type.

To apply changes that you made to all **Data** elements in your report, click **Apply All**.

Displayed Values

- **Calculation used for graph** – Select the calculation type from the menu.

  The following options are:
  - **Show Percent of Valid Responses** (default) – Count of people who have been shown the question and made a selection.
  - **Show Percent of Total Responses** – Count of everyone who has started the survey regardless of what questions they were shown or answered.

- **Show Percent of Sample** – Count of everyone who has started the survey regardless of what questions they were shown or answered.

> The percentages are derived by taking the number of respondents who selected a choice and dividing it by one of the three overall counts. The divisors are based on the different number of ways to define a response to a survey.

- **Statistics** – Define which statistics to show within the frequency table.
- **Row Counts** – Define the row count values to show.
- **Percentages** – Define the percentage values to show.
  - **Cumulative Percentages** – This is accomplished by adding the row percentages within the table.
  - **Percent of Valid Responses** (default) – Count of people who have been shown the question and made a selection.
  - **Percent of Total Responses** – Count of everyone who has started the survey regardless of what questions they were shown or answered.
  - **Percent of Sample** – Count of everyone who has started the survey regardless of what questions they were shown or answered.

> If only one of these percentage options is selected, the Frequency column might appear for it.

  - **Maximum Rows** – Define the number of rows to show within the frequency table by using the **Number of Rows to Display** text box. The valid range of values is from 10 to 15,000. The default value is set to 150. Setting the value greater than 150 may decrease performance.

    For the **Frequency Table** report element with more than 15,000 unique answers, the frequency data is irrelevant. This applies to the **Fill in the Blank**, **Short Answer**, and **Matrix** questions with a **Short Answer** side. Click the **Filter Report Data** button to apply data and date filters to your report.

> The set of properties depends on the question type.

To apply changes that you made to all **Displayed Values** elements in your report, click **Apply All**.

Frequency Chart report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Frequency Chart** report element.

With the **Frequency Chart** report element, you can view the frequency of responses to a selected question.

For the **Frequency Chart** report element with more than 15,000 unique answers, the frequency data is irrelevant. This applies to the **Fill in the Blank**, **Short Answer**, and **Matrix** questions with a **Short Answer** side. Click the **Filter Report Data** button to apply data and date filters to your report.

When you insert the frequency chart into your report, the element editor panel shows a number of collapsible menus, including:

- Report Element
- Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Chart Type**, **Question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Chart Type** – The selected report element type. Use the **Chart Type** menu to change the frequency chart type.
- **Question** – The source question. Use the **Question** menu to change a question. The frequency chart updates to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

> The **Show Question Heading** option is unavailable if the **Frequency Chart** report element uses a file import column.

- **Caption** – A brief description below your report element. Type your text in the text box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

The **Appearance** properties include a number of customization properties.

- **Chart Type** – Select in a menu the chart type for your report element.
    - Bar
    - Column
    - Pie
    - Doughnut
    - Area
    - Line
    - Scatter
    - Spline
    - Spline Area
    - 3D Column
    - 3D Pie (not for Matrix)
    - 3D Doughnut (not for Matrix)
    - Pyramid

Additionally, for a **Matrix** question only:

- Stacked Bar
- Stacked Bar Percentage
- Stacked Column
- Stacked Column Percentage
- 3D Stacked Column
- 3D Stacked Column Percentage

- **Background Color** – Select the background color for your frequency chart from a palette. Select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually into the **Background Color** menu or click **Custom Color** to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – Select the gradient color for the uppermost area of your frequency chart from a palette.
- **Border Color** – Select the border color of your frequency chart from a palette.

- **Border Width** – Adjust the width of borders in your frequency chart. Values that you input into this field are measured in pixels.
- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your frequency chart.
- **Use Different Color for Bar or Column chart types** - Select this check box to show each chart type in different color.
- **Series Color** – Click the **Series Colors** button to select a theme for the series in your chart from the **Series Palette** dialog box and color for each data point from a palette.
- **Show Legend** - Clear this check box to hide the legend on the frequency chart report element.
- **Legend Location** - In the **Legend Location** menu, click the needed legend location (top, bottom, left, or right).
- **Show Grid Lines** - Clear this check box to hide the grid lines on the chart background. **Show Grid Lines** check box is available for Bar, Column, Area, Line, Scatter, Spline, and Spline Area chart types. If you clear the **Show Grid Lines** check box, the grid lines disappear in the preview, test, and design modes.
- **Label Rotation Angle** – Use this text box to define the label rotation angle in degrees.
- **Maximum Characters** – Use this text box to define the maximum number of characters for your frequency chart.
- **Size Charts Automatically** - Select this check box to make the charts fit the current window size automatically.
- **Width** – Use this text box to define the width of your frequency chart. Values you input into this field are measured in pixels.
- **Height** – Use this text box to define the height of your frequency chart. Values you input into this field are measured in pixels.

Several Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Appearance properties, click **Apply All**.

Data

The **Data** properties include the following options:

- **Sort Order** – Shows the order the values appear in the report element. The available options are **Original (Survey order)**, **Alphabetical Order**, and **By Count**. **Original (Survey order)** is a default value. Use the **Sort Order** menu to change the order. The frequency chart updates to show data in the newly selected order.
- **Invert Sort Order** – Shows the values in reverse order.
- **Group unique responses into 'Other Responses'** – Group the individual responses rather than treating them as a separate item on the chart.
- **Decimal Places** – Use this text box to define the decimal places for the values that the frequency chart shows.

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Frequency Chart** element if you select the corresponding check boxes.

- **Label** – Data label that provides details on a particular data point on the **Pyramid** chart type.

> The **Lable** option is active only when the **Pyramid** chart type is selected. The **Pyramid** chart type uses highcharts-labels and highcharts-data-label to show labels, values, and percents on the chart.

- **Value** – Shows the minimum and maximum values for your chart.
- **Percent** – Shows the percentage for each response.
- **Percent by Total** – Shows the percentage for each response calculated by total number of responses.
- **Show Goal Line** – The goal line representing your chart data against a goal.
- **Goal Line Value** – In this text box, set the goal line value. By default, it is set to 0.
- **Label** – In this text box, define the goal line name. The goal line name appears on the legend.
- **Color** – Select the goal line color from a palette.

> The **Goal Line Value**, **Label**, and **Color** options are active only when the **Show Goal Line** check box is selected.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Embed Report Element

In the **Embed Report Element** section of the report designer, you can generate a code snippet and URL to use the **Frequency Chart** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Frequency Chart** report element by editing the code snippet in an HTML or text editor.

> For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

Add a Frequency Chart

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Frequency Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Table** report element.

You can add the **Frequency Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

Procedure

1. In the **Add a Report Element** area, click the **Frequency Chart** element.
2. In the **Select data for your report element** dialog box, in the **Questions** menu, define the source question for the frequency chart.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Trend Table

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Table** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Table** report element.

You can manage and customize your **Trend Table** report element by using the following sections in the left pane:

- Report Element, page 780
- Appearance, page 781
- Data, page 781
- Displayed Values, page 782
- Embed Report Element, page 782

Report Element

In the **Report Element** section, you can show or hide the question text, description, and caption.

The **Trend Table** properties include the following sections:

- **Type** – The selected report element type.

  Question – The source question.
  The following question types can be added as additional values: **Choose One-based**, **Fill in the Blank** (Whole Number/Real Number), **Short Answer** (Whole Number/Real Number), and **Matrix Short Answer** (Whole Number/Real Number).
  To change a question, use the **Question** menu. To add multiple questions (maximum four) from the same survey to the trend table element, use the **Add a question** button. This allows you to see how the selected variables (questions) vary with time and with respect to each other. The trend table is updating to show data from the newly selected questions.

> For the **Trend Table** report element that is based on multiple questions, the properties in the **Data** and **Displayed Values** drawers are limited.

  If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.

- **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section, you can change the look and feel of the element.

The **Appearance** properties include the **Row** and **Header** sections, both providing a number of customizing properties:

- **Color** – Select the background color for the data or header rows.
- **Text Color** – Select the text color for data or header rows. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select in a list of web-compatible fonts for data and header text.
- **Font Size** – Select in a list of web-compatible font sizes for data and header text.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes that you made to all **Trend Table** elements in your report, click **Apply All**.

Data

The **Data** section contains the following properties:

- **Time Period** – Select the time period to break down the selected question data.

Large data sets may take more time to load depending on the number of responses.

- **Reverse Order** – View the values in opposite order.
- **Range of Top Group** – Define the number of choice items to be combined when generating the top group. For example, on a five-point scale, all responses of 0 and 1 will be combined. The top group calculation can be set to 1, 2, or 3 choices. The default is set to the top 1.
- **Range of Bottom Group** – Define the number of choice items to be combined when generating the bottom group calculation. For example, on a five-point scale, all responses of 4 and 5 will be combined. The bottom group calculation can be set to 1, 2, or 3 choices. The default is set to the bottom 2.
- **Decimal Places** – Define the number of decimal places for the values in the table.

The range of **Top** and **Bottom** groups should not overlap and be negative.

To apply changes that you made to all **Trend Table** elements in your report, click **Apply All**.

Displayed Values

In the **Displayed Values** section, you can select the values to be displayed in a **Trend Table** element by selecting the following check boxes:

- **Count** – The number of responses selected for each response item.
- **Mean** – The sum of values divided by the number of values that is an average value.
- **Minimum** – The minimum value (question choice) selected by the respondents.
- **Maximum** – The maximum value (question choice) selected by the respondents.
- **Sum** – The total value of all responses.
- **Standard Deviation** – The distribution of the responses around the mean.
- **Net Score** – The net score calculation.
- **Top Count** – The top group of responses.
- **Neutral Count** – The neutral group of responses.
- **Bottom Count** – The bottom group of responses.

The **Count** and **Mean** check boxes are selected by default.

To apply changes that you made to all **Trend Table** elements in your report, click **Apply All**.

Embed Report Element

In the **Embed Report Element** section, you can generate a code snippet and URL to use the **Trend Table** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Trend Table** element by editing the code snippet in an HTML or text editor.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

Add Trend Table report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Table** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Table** report element.

With the **Trend Table** report element, you can view a time series analysis for any selected question in the survey. You can add the **Trend Table** element to the report either from the **Add a Report Element** left pane or using the **Add** list.

Procedure

1 In the **Add a Report Element** area, click the **Trend Table** report element.

In the **Select data for your report element** dialog box, select the survey question. The following question types can be added as additional values: **Choose One-based**, **Fill in the Blank** (Whole Number/Real Number), **Short Answer** (Whole Number/Real Number), and **Matrix Short Answer** (Whole Number/Real Number).

2 Click **Add**.

3 To change the source question, in the **Report Element** section, in the **Question** menu, click another question.

4 To add multiple questions (maximum four) from the same survey, click **Add a Question** button, and then click the needed question in the list.

> To delete additional question, click the **Delete a Question** button.

5 To change element properties, use the element editor in the left pane.

> For more details, see Trend Table, page 780.

6 To manage your **Trend Table**, use the toolbar in the upper-left corner of the **Trend Table** dialog box.

You can add a **Trend Table** to dashboard, filter, copy, move, or delete it.

Trend Chart

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Trend Chart** report element.

You can manage and customize your **Trend Chart** report element using the following sections in the left pane:

Report Element

In the **Report Element** section, you can show or hide the question text, description, and caption.

The **Trend Chart** properties include the following sections:

- **Type** – The selected report element type.
- **Question** – The source question.
  The following question types can be added as additional values: **Choose One-based**, **Fill in the Blank** (Whole Number/Real Number), **Short Answer** (Whole Number/Real Number), and **Matrix Short Answer** (Whole Number/Real Number).
  To change a question, use the **Question** menu. To add multiple questions (maximum four) from the same survey to the trend chart element, use the **Add a question** button. This allows you to see how the selected variables (questions) vary with time and with respect to each other. The trend chart updates to show data from the newly selected questions.

  > For the **Trend Table** report element that is based on multiple questions, the properties in the **Data** and **Displayed Values** drawers are limited.

  If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** drop-down list. For more information, see Map survey or profile to file import, page 582.
- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.

- **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section, you can change the look and feel of the element.

The **Appearance** properties include the **Row** and **Header** sections, both providing a number of customizing properties:

- **Chart Type** – Select in a list the chart type for your report element.
- **Background Color** – Select the background color of the trend chart.

  If you know the hexadecimal value of a color, you can enter it manually into the **Background Color** menu or click **Custom Color** to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – Select the gradient color for the uppermost area of the element.
- **Border Color** – Select the border color of the element.
- **Border Width** – Adjust the width of trend chart borders (in pixels).
- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your trend chart element.
- **Series Color** – Click the button to select a theme for the series in your chart from the **Series Color** dialog box and a color for each data point.
- **Show Legend** - Clear this check box to hide the legend on the trend chart report element.
- **Legend Location** - In the **Legend Location** menu, click the needed legend location (top, bottom, left, or right).
- **Show Grid Lines** - Clear this check box to hide the grid lines on the chart background. If you clear the **Show Grid Lines** check box, the grid lines disappear in the preview, test, and design modes.
- **Label Rotation Angle** – Define the label rotation angle (in degrees).
- **Maximum Characters** – Define the maximum number of characters for your element.
- **Width** – Set the width of the trend chart element (in pixels).
- **Height** – Set the height of the trend chart element (in pixels).

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes that you made to all **Trend Chart** elements in your report, click **Apply All**.

Data

The **Data** section contains the following properties:

- **Decimal Places** – Define the number of decimal places for the values in the table. The default value is set to 3.
- **Range of Top Group** – Define the number of choice items to be combined when generating the top box calculation. For example, on a five-point scale all responses of 1 and 2 will be combined. The top box calculation can be set to 1, 2, or 3 choices. The default is set to the top 2.
- **Range of Bottom Group** – Define the number of choice items to be combined when generating the bottom box calculation. For example, on a five-point scale all responses of 4 and 5 will be combined. The bottom box calculation can be set to 1, 2, or 3 choices. The default is set to the bottom 2.

Large data sets may take more time to load depending on the number of responses and length of time requested.

To apply changes that you made to all **Trend Chart** elements in your report, click **Apply All**.

Displayed Values

In the **Displayed Values** section, you can select the values to be displayed in a **Trend Chart** element by selecting the followingcheck boxes.

- **Count** – The number of responses selected for each response item.
- **Mean** – The sum of values divided by the number of values that is an average value.
- **Minimum** – The minimum value (question choice) selected by the respondents.
- **Maximum** – The maximum value (question choice) selected by the respondents.
- **Sum** – The total value of all responses.
- **Standard Deviation** – The distribution of the responses around the mean.
- **Value** – The minimum and maximum values for your chart.
- **Net Score** – The net score calculation.
- **Top Box** – The cumulative total of the top two items of a rating scale. This option is available only for the **Bar**, **Column**, **Line**, and **Area** chart types.
- **Show Goal Line** – The goal line representing your chart data against a goal.
- **Goal Line Value** – Set the goal line value. The default is set to 0.
- **Label** – Define the goal line name. The goal line name appears on the legend.
- **Color** – Select the goal line color.

The **Count** and **Mean** check boxes are selected by default.

To apply changes that you made to all **Trend Chart** elements in your report, click **Apply All**.

Embed Report Element

In the **Embed Report Element** section, you can generate a code snippet and URL to use the **Trend Chart** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Trend Chart** element by editing the code snippet in an HTML or text editor.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

Add a Trend Chart report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element.

You can visualize your survey verbatim datasets in a trend chart for better understanding of the verbatim responses.

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Trend Chart** element.

> You can add the **Trend Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Trend Chart** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Trend Chart** report element when your survey has the **Open** or **Closed** status only.

Image Slideshow report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Image Slideshow** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Image Slideshow** report element.

With the **Image Slideshow** report element, you can easily view and rotate images that are uploaded by a respondent when answering the **Image Upload** questions.

> You can select another data source for your report element by clicking the survey link in the **Select data for your report element** dialog box.

If you have already added other elements to the report, click the **Add** menu to add the **Image Slideshow** element. Images are displayed according to the date uploaded.

When clicking on the **Image Slideshow** report element, the **Image** dialog box opens, where you can view the image itself, date when it was uploaded, location where it was taken, and tags added to the image. You can also download the image by clicking the **Download Image** link, rate the image, and change the rating previously added to the image.

> The rating option is not editable if the **Edit Responses** permission is not activated for your user role.

In the element editor pane, you can customize the **Image Slideshow** report element in the following way:

- **Report Element** - Use to customize element properties:
  - **Type** - View the selected report element type.
  - **Question** - View the source question. Use the **Question** menu to change the source question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** - The customizing properties.

  Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.

  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** - Add a brief description below your report element. Type your text in the text box and customize its font size and style. You can select the color of caption foreground and background from the foreground color and background color drop-down menus. To check the spelling, click **Spell Check**.

Embed Report Element

Use the HTML code snippet to place the report elements into a custom webpage outside of the product. You can also configure the report element by editing the code snippet in HTML or text editor.

> The flow of the images or images themselves may appear blurry or distorted depending on which browser you use.

Image Tag Cloud report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Image Tag Cloud** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Image Tag Cloud** report element.

With the **Image Tag Cloud** report element, you can view a word cloud of tags that were added by the respondent when answering the **Image Upload** question.

You can select another data source for your report element by clicking the survey link in the **Select data for your report element** dialog box.

If you have already added other elements to the report, click the **Add** menu to add the **Image Tag Cloud** element.

In the element editor pane, you can customize the **Image Tag Cloud** report element in the following way:

- **Report Element** - Use to customize element properties.
  - **Type** – Use to view the selected report element type.
  - **Question** – Use to view the source question. Use the **Question** menu to change the source question.

If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – Add a brief description below your report element. Type your text in the text box and customize its font size and style. You can select the color of caption foreground and background in the menus. To check the spelling, click **Spell Check**.
  - **Appearance** – Use to customize the look and feel of the word cloud of tags.
  - **Cloud Shape** – Select the form of the word cloud of tags in menu: elliptic or rectangular.

  - **Background Color** – Select the background color for your word cloud of tags from a palette. Select from a range of colors in the Web Palette, RGB Sliders, Hue, Saturation, and Brightness (HSB), and Hue, Saturation, and Value (HSV). If you know the hexadecimal value of a color, you can enter it manually.
  - **Border Color** – Select the border color of your word cloud of tags from a palette.
  - **Border Width** – Adjust the width of borders in your word cloud of tags (in pixels).
  - **Size Cloud Automatically** – Select this check box to make the word cloud of tags fit the current window size automatically.
- **Data** – Use to manage the amount of content in your word cloud of tags.
  - **Maximum Items** – Enter the number of tags that you want to be displayed in the word cloud. By default, 100 items are displayed.

Summary Table report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the**Summary Table**report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary Table** report element.

With the **Summary Table** report element, you can view the results of one question's responses against two demographic fields, for example, a report on a salary against age and gender. You can add the **Summary Table** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

Once you insert the summary table into your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Row Question**, **Column Question**, **Question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Row Question** – The source row question. Use the **Row Question** menu to change a question. The summary table updates to show data from the newly selected question.
- **Column Question** – The source column question. Use the **Column Question** menu to change a question. The summary table is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Row Question** and **Column Question** menus. For more information, see Map a file import to project or profile, page 1174.

- **Question** – The source question. Use the **Question** menu to change a question. The summary table is updating to show data from the newly selected question.
- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.

- **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
- **Show Report Values** - Select the check box to display the report values on your report element.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties section includes the following options:

- **Decimal Places** – Use this text box to define the number of decimal places for the values that the summary table shows.
- **Show Values Using Color** – Select this check box to apply color to the values based on the **Calculation used to color cells** option.
- **Calculation used to color cells** – Use this menu to select calculation options for the value coloring.

To apply changes you have made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Summary Table** element if you select the corresponding check boxes.

- **Count** – The number of responses selected for each response item.
- **Mean** – The sum of values divided by the number of values that is an average value.
- **Minimum** – The minimum value (question choice) selected by the respondents.

- **Maximum** – The maximum value (question choice) selected by the respondents.
- **Sum** – The total value of all responses.
- **Standard Deviation** – The distribution of the responses around the mean.
- **Local Maxima** – The maximum value of each interval. It is shown in bold.
- **Group unique responses into 'Other Responses'** – Use this option to group the individual responses rather than treating them as a separate item on the table.

The **Mean** and **Local Maxima** values are selected by default.

Add Summary Table report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary Table** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary Table** report element.

You can add the **Summary Table** report element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

Procedure

1 In the **Add a Report Element** area, click the **Summary Table** element.

2 In the **Select data for your report element** dialog box, in the **Questions** menu, define the source question for the summary table.

3 In the **Row Question** menu, define the row question for the summary table.

4 In the **Column Question** menu, define the column question for the summary table.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

5 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Summary of Means report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary of Means** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary of Means** report element.

With the **Summary of Means** report element, you can view the means of the responses based on two questions in a single table. You can add the **Summary of Means** element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

When you add the **Summary of Means** element to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Broken Down By**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The **Summary of Means** element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Broken Down By** – The breaking-down question. Use the **Broken Down By** menu to change a question. The **Summary of Means** element is updating to show data from the newly selected question.
- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.

  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties include the following options.

- **Decimal Places** – Use this text box to define the number of decimal places for the values that the summary of means shows.
- **Show Values Using Color** – Select this check box to apply color to the values based on the **Calculation used to color cells** option.
- **Calculation used to color cells** – Use this menu to select calculation options for the value coloring.
- To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Summary of Means** element if you select the corresponding check boxes.

- **Count** – The number of responses selected for each response item.
- **Mean** – The sum of values divided by the number of values that is an average value.
- **Minimum** – The minimum value (question choice) selected by the respondents.
- **Maximum** – The maximum value (question choice) selected by the respondents.
- **Sum** – The total value of all responses.
- **Standard Deviation** – The distribution of the responses around the mean.

- **Group unique responses into 'Other Responses'** – Use this option to group the individual responses rather than treating them as a separate item on the table.
- **Local Maxima** – The maximum value of each interval. It is shown in bold.

The **Mean**, **Group unique responses into 'Other Responses'**, and **Local Maxima** check boxes are selected by default.

Add Summary of Means report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary of Means** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Summary of Means** report element.

You can add the **Summary of Means** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1. In the **Add a Report Element** area, click the **Summary of Means** element.
2. In the **Select data for your report element** dialog box, in the **Questions** menu, define the source question for the summary of means.
3. In the **Broken Down By** menu, define the breaking-down question for the summary of means. You can select any type of question in the menu.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

4. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab** report element.

With the **Cross-tab** report element, you can view a cross-tabulation of two selected questions. You can add the **Cross-tab** element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

When you add the cross-tabulation to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Row Question**, **Column Question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Row Question** – The source row question. Use the **Row Question** menu to change a question. The **Cross-tab** element is updating to show data from the newly selected question.
- **Column Question** – Shows the source column question. Use the **Column Question** menu to change a question. The **Cross-tab** element is updating to show data from the newly selected question.

If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Row Question** and **Column Question** menus. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.

  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

> Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties include the following options.

- **Decimal Places** – Use this text box to define the decimal places for the values that the cross-tabulation shows.
- **Calculation used to color cells** – Use this menu to select calculation options for the value coloring.

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Cross-tab** element if you select the corresponding check boxes.

- **Response Count** – Select this check box to show the number of cross responses on the column and row questions.
- **Percent by Column** – Select this check box to show the percentage for each response calculated by column.
- **Percent by Row** – Select this check box to show the percentage for each response calculated by row.
- **Percent by Total** – Select this check box to show the percentage for each response calculated by total number of responses.

- **Local Maxima** – Select this check box to show the maximum value of each interval. It is shown in bold.
- **Group unique responses into 'Other Responses'** – Use this option to group the individual responses rather than treating them as a separate item on the table.
- **Show Values Using Color** – Select this check box to apply color to the values based on the **Calculation used to color cells** option.

The **Percent by Column** and **Percent by Total** check boxes are clear by default.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab** report element.

You can add the **Cross-tab** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1. In the **Add a Report Element** pane, click the **Cross-tab** element.
2. In the **Select data for your report element** dialog box, in the **Column Question** menu, define the column question for the cross-tabulation.
3. In the **Row Question** menu, define the row question for the cross-tabulation.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

4. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Cross-tab Chart report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab Chart** report element.

With the **Cross-tab Chart** report element, you can view a cross-tabulation of two selected questions as a chart. The size of the chart bubbles depends on the number of responses to the corresponding question. You can add the **Cross-tab Chart** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

When you add the cross-tab chart to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Appearance
- Data
- Displayed Values
- Embed Report Element

Report Element

The **Report Element** properties include the **Chart Type**, **X-Axis question**, **Y-Axis question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Chart Type** – The selected report element type. Use the **Chart Type** menu to change the **Cross-tab Chart** type.
- **X-Axis Question** – The source question for the X axis of the chart. Use the **X-Axis Question** menu to change the question. The cross-tab chart element is updating to show data from the newly selected question.
- **Y-Axis Question** – The source question for the Y axis of the chart. Use the **Y-Axis Question** menu to change the question. The cross-tab chart element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.

   - **Show Question Description** - Select the check box to show the question description.
   - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
   - **Show Report Values** - Select the check box to display the report values on your report element.
   - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type the text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

The **Appearance** properties include a number of customization properties.

- **Chart Type** – Select in a menu the chart type for your report element.
   - Bubble
   - 3D Bubble
   - Scatter Plot– A chart which describes values for two variables for a set of data.

> The default chart type value is **Bubble**.

- **Background Color** – Select the background color for your cross-tab chart from a palette. Select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually into the **Background Color** menu or click **Custom Color** to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – Select the gradient color for the uppermost area of your cross-tab chart from a palette.
- **Border Color** – Select the border color of your cross-tab chart from a palette.
- **Border Width** – Adjust the width of borders in your cross-tab chart. Values you input into this field are measured in pixels.
- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your cross-tab chart.
- **Use Different Color for Each Bubble** – Select this check box to show each bubble in the chart in different color.
- **Series Colors** – Click the **Series Colors** button to select a theme for the series in your chart in the **Series Palette** dialog box and color for each data point from a palette.
- **Show Legend** – Select this check box to display the legend on the cross-tab chart. This check box is clear by default. The legend appears to the right of the chart. You can click the label to show or hide the chart values.
- **Legend Location** - In the **Legend Location** menu, click the needed legend location (top, bottom, left, or right).

- **Show Grid Lines** - Clear this check box to hide the gray lines on the chart background. If you clear the **Show Grid Lines** check box, the grid lines disappear in the preview, test, and design modes.
- **Label Rotation Angle** – Use this text box to define the label rotation angle in degrees.
- **Maximum Characters** – Use this text box to define the maximum number of characters for your cross-tab chart.
- **Size Charts Automatically** – Select this check box to make the cross-tab charts fit the current window size automatically.
- **Width** – Use this text box to define the width of your cross-tab chart. Values you input in this field are measured in pixels.
- **Height** – Use this text box to define the height of your cross-tab chart. Values you input in this field are measured in pixels.

You can also customize your chart appearance by using the advanced chart properties. For more information, see Advanced chart properties, page 732.

Data

These properties are available only when weighting scheme is applied to your cross-tab chart.

- **Decimal Places** – Use this text box to define the decimal places for the values that the cross-tab chart shows.
- **Display Weighted Values** – Select this check box to display weighted values in your cross-tab chart.

Displayed Values

- **Show Total Responses** – Select this check box to display the total number of responses.
- **Show Total Responses Weighted** – Select this check box to display the total number of responses covered by weighting.
- **Response Count** – Select this check box to show the number of cross responses on the X-axis and Y-axis questions.
- **Show Regression Line** – Select this check box to have a regression line displayed on a **Scatter Plot** chart. You can also set a label and color for a regression line.
- **Label** – In this text box, define the regression line name. The regression line name appears on the legend.
- **Color** – Select the regression line color from a palette.

The **Show Total Responses** and **Show Total Responses Weighted** check boxes are available only when weighting scheme is applied to your cross-tab chart and the **Display Weighted Values** check box in the **Data** section is selected.

The **Show Regression Line** check box is available only for a **Scatter Plot** chart type.

Embed Report Element

You can generate a code snippet and URL to embed the **Cross-tab Chart** report element into external applications.

You can use the code snippet to place the **Cross-tab Chart** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the cross-tab chart by editing the code snippet in an HTML or text editor.

You can use the URL to place the **Cross-tab Chart** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the cross-tab chart on your custom page.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

Add Cross-tab Chart report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab Chart** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Cross-tab Chart** report element.

You can add the **Cross-tab Chart** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1 In the **Add a Report Element** panel, click the **Cross-tab Chart** element.

2 In the **Select data for your reportelement** dialog box, in the **Y-Axis Question** menu, select the Y-axis source question for the cross-tab chart.

3 In the **X-Axis Question** menu, select the X-axis source question for the cross-tab chart.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

4 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Response List report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Response List** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Response List** report element.

The **Response List** report element enables you to insert the responses of any open-ended questions (**Essay** and **Fill in the Blank**) of your survey into your report. You can add the **Response List** element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

When you add the response list to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Displayed Values

Report Element

The **Report Element** properties are divided into the **Type**, **Question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The response list is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

The **Show Question Heading** option is unavailable, if the **Frequency Chart** report element uses a file import column.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties are divided into the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties enable you to define the rows number per page in your response list. Select the **ID column** check box to add the **ID** column to the response list.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Response List report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Response List** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Response List** report element.

You can add the **Response List** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1. In the **Add a Report Element** panel, click the **Response List** element.
2. In the **Select data for your report element** dialog box, in the **Questions** menu, click the question you want to add.
3. In the **X-Axis Question** menu, select the X-axis source question for the cross-tab chart.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

4. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Statistics report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics** report element.

With the **Statistics** report element, you can collect statistical data in a single table. The **Statistics** element can be used with the following question types: Choose One and multiple choice questions within a Matrix. You can add the **Statistics** element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

When you add the statistics element to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The statistic element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties.

  Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

> Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties menu contains the text box which you can use to set the number of decimal places for the values in the table.

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties menu shows the type of statistics element that appears in the table. You can select the statistics element type from the **Statistics** menu. The available options are **Standard**, **Detailed**, and **Basic**.

> The **Standard** set of values is selected by default.

- **Detailed** – Contains the following set of values for the selected question:
  - **Kurtosis** – The relatively peaked or flat distribution compared with the normal distribution. Positive kurtosis means a relatively peaked distribution. Negative kurtosis means a relatively flat distribution.
  - **Maximum** – The maximum value (question choice) selected by the respondents.
  - **Mean** – The sum of values divided by the number of values that is an average value.
  - **Mean Absolute Deviation** – The sum of absolute values of the differences from the mean.
  - **Median** – The numerical value in the center after ordering all the values. It has an equal number of values below and above it.
  - **Minimum** – The minimum value (question choice) selected by the respondents.

- **Mode** – The value representing the highest frequency.
- **Poisson** – The probability of a particular event occurrence in a specific time period.
- **Range** – The difference between the largest and smallest data point.
- **Skew** – The degree of distribution asymmetry around its mean. Positive skews mean a distribution with an asymmetric tail extending toward more positive values (to the right). Negative skews mean a distribution with an asymmetric tail extending toward more negative values (to the left).
- **Standard Deviation** – The distribution of the responses around the mean.
- **Sum** – The total value of all responses.
- **Total Responses** – The total number of responses.
- **Valid Responses** – The number of valid responses.
- **Variance** – The spread of the data around the mean.

- **Standard** – Contains the following set of values for the selected question:
  - **Maximum** – The maximum value (question choice) selected by the respondents.
  - **Mean** – The sum of values divided by the number of values that is an average value.
  - **Median** – The numerical value in the center after ordering all the values. It has an equal number of values below and above it.
  - **Minimum** – The minimum value (question choice) selected by the respondents.
  - **Mode** – The value representing the highest frequency.
  - **Standard Deviation** – The distribution of the responses around the mean.
  - **Sum** – The total value of all responses.
  - **Total Responses** – The total number of responses.
  - **Valid Responses** – The number of valid responses.
- **Basic** – Contains the following set of values for the selected question:
  - **Mean** – The sum of values divided by the number of values.
  - **Standard Deviation** – The distribution of the responses around the mean.
  - **Total Responses** – The total number of responses.
  - **Valid Responses** – The number of valid responses.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Statistics report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics** report element.

You can add the **Statistics** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1 In the **Add a Report Element** area, click the **Statistics** report element.

2 In the **Select data for your report element** dialog box, in the **Questions** menu, click the question you want to add.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Correlation report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Correlation** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Correlation** report element.

With the **Correlation** report element, you can compare two variables from your survey. The range of potential values is -1.0 to 1.0. A correlation approaching 1.0 signifies that two values are strongly related. You can add the **Correlation** element to the report either in the **Add a Report Element** pane or on the **Add** menu.

When you add the **Correlation** element to your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Variable 1**, **Variable 2**, **Labels**, , and **Caption** sections providing a number of customization properties.

- **Type** – The selected report element type.
- **Variable 1** – The first question to be compared. Use the **Variable 1** menu to change a question. The **Correlation** element is updating to show data from the newly selected question.
- **Variable 2** – The second question to be compared. Use the **Variable 2** menu to change a question. The **Correlation** element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available on the **Variable** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background on the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

> Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The Data properties include the following options:

- **Decimal Places** – Use this text box to define the number of decimal places for the values that the **Correlation** element shows.
- **Significance Cutoff** – Use this menu to define the significance value for your correlation element. The following options are available:
  - $p < 0.5$
  - $p < 0.2$
  - $p < 0.1$
  - $p < 0.05$
  - $p < 0.02$
  - $p < 0.01$
  - $p < 0.001$

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain the **Significance Column** check box. Select the **Significance Column** check box to show values based on the **Significance Cutoff** option.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Correlation report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Correlation** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Correlation** report element.

You can add the **Correlation** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1 In the **Add a Report Element** area, click the **Statistics** report element. The **Select data for your report element** dialog box opens.

2 In the **Select data for your report element** dialog box, in the **Variable 1** and **Variable 2** menus, define two questions to be compared.

- On the **Variable 1** menu, the following question types are available:
  - Multiple Choice: Choose One
  - Multiple Choice: Choose Many
  - Fill in the Blank (numeric)
  - Matrix
- On the **Variable 2** menu, the following question types are available:
  - Multiple Choice: Choose One
  - Multiple Choice: Choose Many
  - Mean calculation of Fill in the Blank questions (numeric)
  - Mean calculation of the Matrix questions based on the Multiple Choice: Choose One and Multiple Choice: Choose Many questions

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Gap report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Gap** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Gap** report element.

With the **Gap** report element, you can identify the differences between two numerical values. This report is run against the numerical **Fill in the Blank** questions or different sides of a **Matrix** question. A common gap analysis is to compare the satisfaction and importance ratings for a question topic. The **Gap** element subtracts the mean of the **Comparison** question from the mean of the **Basis** question. You can add the **Gap** element to the report either in the **Add a Report Element** left pane or on the **Add** menu.

When you add the **Gap** element to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Table Appearance
- Data

Report Element

The **Report Element** properties include the **Type**, **Comparison**, **Basis**, **Labels**, and **Caption** sections providing a number of customization properties.

- **Type** – The selected report element type.
- **Comparison** – The first question to be compared. Use the Comparison menu to change a question. The **Gap** element is updating to show data from the newly selected question.
- **Basis** – The second question to be compared. Use the **Basis** menu to change a question. The **Gap** element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Comparison** and **Basis** menus. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties menu contains the **Decimal Places** text box which you can use to set the number of decimal places for the values in the **Gap** report element.

To apply changes that you made to the Data properties, click **Apply All**.

Top Box report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box** report element.

With the **Top Box** report element, you can view the cumulative total of the top two items of a rating scale and define the number of rating points used in the top and bottom box calculation. You can add the **Top Box** element to the report either in the **Add a Report Element** left pane or on the **Add** menu.

When you add the top box to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Labels**, and **Caption** sections providing a number of customization properties.

- **Type** – Shows the selected report element type.
- **Question** – Shows the source question. Use the **Question** menu to change a question. The **Top Box** is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background

from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties include the following options:

- **Reverse Order** – Use this check box to view the values in an opposite order.
- **Decimal Places** – Use this text box to define the decimal places for the values that the top box shows.
- **Range of Top Group** – Use this text box to define the number of choice items to be combined when generating the top box calculation. The default is set to the top 2. For example, on a five-point scale all responses of 1 and 2 will be combined. The top box calculation can be set to 1, 2, or 3 choices.
- **Range of Bottom Group** – Use this text box to define the number of choice items to be combined when generating the bottom box calculation. The default is set to the bottom 2. For example, on a five-point scale all responses of 4 and 5 will be combined. The bottom box calculation can be set to 1, 2, or 3 choices.

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Top Box** element if you select the corresponding check boxes.

- **Mean** – Select this check box to show the sum of values divided by the number of values (average value).
- **Local Maxima** – Select this check box to show the maximum value of each interval. It is shown in bold.
- **Bar Chart Labels** – Select this check box to show the percentage labels on responses bar chart.

- **Box Ranges in Column Headers** – Select this check box to show the range of responses in column headers.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Top Box report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box** report element.

You can add the **Top Box** report element to the report either in the **Add a Report Element** left pane or in the **Add** menu.

Procedure

1. In the **Add a Report Element** area, click the **Top Box** report element.
2. In the **Select data for your reportelement** dialog box, in the **Questions** menu, click the question you want to add.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Top Box Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box Cross-tab** report element.

With the **Top Box Cross-tab** report element, you can create a summary of the responses to a question broken down by the responses of another question. You can add the **Top Box Cross-tab** element to the report either in the **Add a Report Element** left pane or on the **Add** menu.

When you add the **Top Box Cross-tab** element to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Table Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Broken Down By**, **Labels**, and **Caption** sections providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The **Top Box Cross-tab** element is updating to show data from the newly selected question.
- **Broken Down By** – The breaking-down question. Use the **Broken Down By** menu to change a question. The **Top Box Cross-tab** element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** and **Broken Down By** menus. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.

- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the Foreground Color and Background Color menus. To check the spelling, click **Spell Check**.

Table Appearance

The **Table Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

Several Table Appearance properties can be assigned throughout the report with the report theme.

To apply changes that you made to the Table Appearance properties, click **Apply All**.

Data

The **Data** properties include the following options:

- **Reverse Order** – Use this check box to view the values in an opposite order.
- **Decimal Places** – Use this text box to define the decimal places for the values that the top box cross-tabulation shows.
- **Range of Top Group** – Use this text box to define the number of choice items to be combined when generating the top box calculation. The default is set to the top 2. For example, on a five-point scale all responses of 1 and 2 will be combined. The top box calculation can be set to 1, 2, or 3 choices.
- **Range of Bottom Group** – Use this text box to define the number of choice items to be combined when generating the bottom box calculation. The default is set to the bottom 2. For example, on a five-point scale all responses of 4 and 5 will be combined. The bottom box calculation can be set to 1, 2, or 3 choices.
- **Group unique responses into 'Other Responses'** – Use this option to group the individual responses rather than treating them as a separate item on the table.

To apply changes that you made to the Data properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in a **Top Box Cross-tab** element if you select the corresponding check boxes.

- **Mean** – Select this check box to show the sum of values divided by the number of values (average value).
- **Local Maxima** – Select this check box to show the maximum value of each interval. It is shown in bold.
- **Bar Chart Labels** – Select this check box to show the percentage labels on responses bar chart.
- **Box Ranges in Column Headers** – Select this check box to show the range of responses in column headers.

To apply changes that you made to the Displayed Values properties, click **Apply All**.

Add Top Box Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Top Box Cross-tab** report element.

You can add the **Top Box Cross-tab** element to the report either in the **Add a Report Element** left pane or on the **Add** menu.

Procedure

1 In the **Add a Report Element** area, click the **Top Box** report element.

2 In the **Select data for your reportelement** dialog box, in the **Questions** menu, define the source question for the top box cross-tabulation.

3 In the **Broken Down By** list, define the breaking-down question for the top box cross-tabulation.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

4 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Respondent Map report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Respondent Map** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Respondent Map** report element.

You can manage and customize your **Respondent Map** report element by using the following sections in the left pane:

- Report Element
- Appearance
- Embed Report Element

Report Element

In the **Report Element** section, you can show or hide the element text, description, and caption. The **Respondent Map** properties include the following sections:

- **Type** – The selected report element type.
- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Element Text** - Select the check box to show the element text.
  - **Show Element Description** - Select the check box to show the element description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type the text in the edit box and customize its font size and style. You can select the color of caption foreground and background color in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section, you can specify the look and feel of the element. The appearance settings can change according to different report themes. The following properties are available:

- **Background Color** – Select the background color of the map.
- **Gradient End Color** – Select the gradient color for the uppermost area of the element.
- **Border Color** – Select the color of the border of the element.
- **Border Width** – Adjust the width of map borders (in pixels).

- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your respondent map element.
- **Series Colors** – Click the button to select a theme for the series in your pie chart from the **Series Colors** dialog box and a color for each data point.
- **Show Legend** – Select this check box to display the legend on the respondent map. This check box is selected by default.
- **Legend Location** - In the **Legend Location** list, click the needed legend location (top, bottom, left, or right).
- **Size Charts Automatically** – Select this check box to make the respondent map element fit the current window size automatically.
- **Width** – Set the width of the respondent map element (in pixels).
- **Height** – Set the height of the respondent map element (in pixels).

The **Width** and the **Height** options become available if you clear the **Size Charts Automatically** check box

Click the **Apply All** button to apply changes to all **Respondent Map** elements in your report.

Embed Report Element

In the **Embed Report Element** section, you can generate a code snippet and URL to use the **Respondent Map** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Respondent Map** element by editing the code snippet in an HTML or text editor.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

For the **Statistics Map** and **Respondent Map** report elements, the drill-down within continents and countries is unavailable in embedded report element.

Add Respondent Map report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Respondent Map** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Respondent Map** report element.

With the **Respondent Map** report element, you can view the geographical distribution of the survey respondents which is based on the number of responses gathered from different locations. In the **Respondent Map** dialog box, you can see the total number of responses to your survey.

The **Respondent Map** indicates areas of the maximum survey participation with different colors. It displays the respondents spread geographically: by the world, by continent, and by country/state. The following countries support the drill-down within a country: USA, Canada, United Kingdom, Germany, Australia, and New Zealand. For example, if there are respondents from different states of USA, you can view them distributed by their states. If all survey participants are from the same country, only this country is displayed on the **Respondent Map**.

> For the responses from the United Kingdom, clicking on **England**, **Wales**, **Northern Ireland**, or **Scotland** drills down to the next regional level.

Procedure

1 In the **Add a Report Element** area, click the **Respondent Map** report element.

2 In the **Select data for your report element** dialog box, select the source survey for the **Respondent Map**, and then click **Add**.

3 To view the number and percentage of participants on the map, click the locations or use zoom in + and zoom out − buttons.

4 To change the element properties, use the element editor in the left pane.

For more details, see Respondent Map report element, page 830.

5 To manage your **Respondent Map**, use the toolbar in the upper-right corner of the **Respondent Map** dialog box.

You can add a **Respondent Map** to dashboard, filter, copy, move, and delete it.

Statistics Map report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics Map** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics Map** report element.

You can manage and customize your **Statistics Map** report element by using the following sections in the left pane:

- Report Element
- Appearance
- Data
- Displayed Values
- Embed Report Element

Report Element

In the **Report Element** section, you can show or hide the heading, text, and description of the selected question.

The **Statistics Map** properties include the following sections:

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type the text in the edit box and customize its font size and style. You can select the color of caption text from the **Foreground**

Color, and background color from the **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section, you can specify the look and feel of the element.

The appearance settings can change according to different report themes.

The following properties are available:

- **Background Color** – Select the background color of the map.
- **Gradient End Color** – Select the gradient color for the uppermost area of the element.
- **Border Color** – Select the color of the border of the element.
- **Border Width** – Adjust the width of map borders (in pixels).
- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your respondent map element.
- **Series Colors** – Click this button to select a theme for the series in your pie chart from the **Series Colors** dialog box and a color for each data point.
- **Show Legend** – Select this check box to display the legend on the right side of the statistics map. This check box is selected by default.
- **Legend Location** - In the **Legend Location** list, click the needed legend location (top, bottom, left, or right).
- **Size Charts Automatically** – Select this check box to make the respondent map element fit the current window size automatically.
- **Width** – Set the width of the respondent map element (in pixels).
- **Height** – Set the height of the respondent map element (in pixels).

The **Width** and **Height** options become available if you clear the **Size Charts Automatically** check box.

To apply changes to all **Statistics Map** elements in your report, click the **Apply All** button.

Data

The **Data** section contains the following options:

- **Reverse Order** – View the values in an opposite order.
- **Decimal Places** – Define the decimal places for the values in the report element.
- **Range of Top Group** – Define the number of choice items to be combined when generating the top group calculation. The default value is 18%. The top map calculation can be set to 1, 2, or 3 choices. For example, if the top is set to 2 on a ten-point scale, all responses of 9 and 10 are combined.
- **Range of Bottom Group** – Define the number of choice items to be combined when generating the bottom group calculation. The default value is 62%. The bottom map calculation can be set to 1, 2, or 3 choices. For example, if the bottom is set to 6 on a ten-point scale, all responses of 1, 2, 3, 4, 5, and 6 are combined.

To apply changes to all **Statistics Map** elements in your report, click the **Apply All** button.

> The range of **Top** and **Bottom** groups cannot be negative or overlap.

Displayed Values

In the **Displayed Values** section, you can select the report metrics to be displayed on the map. By default, **Mean** is selected. Hover over the map element to view a tooltip with the selected metrics.

> Metrics selected from the menu are used as a source for displaying colors on the map. Metrics selected in check boxes are only displayed in the element tooltip.

The following metrics are available:

- **Minimum** – The minimum value (question choice) selected by the respondents.
- **Maximum** – The maximum value (question choice) selected by the respondents.
- **Range** – The difference between the largest and smallest data point.
- **Sum** – The total value of all responses.
- **Mean** – The sum of values divided by the number of values that is an average value.
- **Median** – The numerical value in the center after ordering all the values. It has an equal number of values below and above it.
- **Mode** – The value representing the highest frequency.
- **Variance** – The spread of the data around the mean.
- **Total Responses** – The total number of responses.
- **Valid Responses** – The number of valid responses.
- **Top** – The top group of responses.
- **Neutral** – The neutral group of responses.
- **Bottom** – The bottom group of responses.
- **Net Score** – The net score calculation. For more information, see Net Score in Statistics Map, page 750.

Embed Report Element

In the **Embed Report Element** section, you can generate a code snippet and URL to use the **Statistics Map** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Statistics Map** element by editing the code snippet in an HTML or text editor.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

For the **Statistics Map** and **Respondent Map** report elements, the drill-down within continents and countries is unavailable in embedded report element.

Add Statistics Map report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics Map** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Statistics Map** report element.

With the **Statistics Map** report element, can view the geographical distribution of the specific metrics based on responses to the selected survey question.

The **Statistics Map** displays the respondents spread geographically: by the world, by continent, and by country/state. The following countries support the drill-down within a country: USA, Canada, United Kingdom, Germany, Australia, and New Zealand. For example, if there are respondents from different states of USA, you can view them distributed by their states.

> For the responses from the United Kingdom, clicking on **England**, **Wales**, **Northern Ireland**, or **Scotland** drills down to the next regional level.

The **Statistics Map** report element can include information based on the following questions:

- **Choose One**
- **Choose One with Image**
- **Scrolling Matrix**
- **Matrix Choose One**
- **Scale Slider**
- **Drag & Drop Rank Order**
- **Rank Order**
- **Short Answer** (Whole Number and Real Number)
- **Fill in the Blank** (Whole Number and Real Number)

Procedure

1. In the **Add a Report Element** area, click the **Statistics Map** report element.
2. In the **Select data for your report element** dialog box, click the **Data Source** survey link, and then select the source survey and the needed question for the statistics map.
3. Click **Add**.
4. To view the statistics for specific locations on the map, click the locations or use zoom in + and zoom out − buttons.
5. To change the element properties, use the element editor in the left pane.

   For more details, see Statistics Map report element, page 833.

6 To manage your **Statistics Map**, use the toolbar in the upper-left corner of the **Statistics Map** dialog box.

You can add your **Statistics Map** to dashboard, filter, copy, move, and delete it.

Campaign Statistics report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Campaign Statistics** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Campaign Statistics** report element.

You can manage and customize your **Campaign Statistics** report element by using the following sections in the left pane:

- Report Element
- Appearance
- Displayed Values
- Embed Report Element

Report Element

In the **Report Element** section of the **Campaign Statistics** element, you can show or hide the element text, description, and caption.

The **Campaign Statistics** properties include the following sections:

- **Chart Type** – The selected report element type.
- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Element Text** - Select the check box to show the element text.
  - **Show Element Description** - Select the check box to show the element description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type the text in the edit box and customize its font size and style. You can select the color of caption foreground and background in the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section of the **Campaign Statistics** element, you can change the look and feel of the element.

There are the following **Appearance** properties:

- **Chart Type** – Select the chart type for your report element. The default value is Pie and it is not editable.

- **Background Color** – Select the background color of the element .
- **Gradient End Color** – Select the gradient color for the uppermost area of the element.
- **Border Color** – Select the border color of the element.
- **Border Width** – Adjust the width of campaign statistics borders (in pixels).
- **Border Radius** – Increase or decrease the roundness of border corners in your element.
- **Series Color** – Click the button to select a theme for the series in your pie chart from the **Series Palette** dialog box and a color for each data point.
- **Show Legend** – Display the legend on the campaign statistics. This check box is selected by default.
- **Legend Location** - In the **Legend Location** list, click the needed legend location (top, bottom, left, or right).
- **Show Grid Lines** - Clear this check box to hide the grid lines on the chart background. **Show Grid Lines** check box is available for Bar and Column chart types. If you clear the **Show Grid Lines** check box, the grid lines disappear in the preview, test, and design modes.
- **Label Rotation Angle** – Define the label rotation angle (in degrees).
- **Maximum Characters** – Define the maximum number of characters for the labels on your campaign statistics element.
- **Size Charts Automatically** – Fit the element to the current window size automatically.
- **Width** – Set the width of the campaign statistics element (in pixels).
- **Height** – Set the height of the campaign statistics element (in pixels).

> The **Width** and the **Height** options become available if you clear the **Size Charts Automatically** check box.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Campaign Statistics** elements in your report, click the **Apply All** button.

Displayed Values

The **Displayed Values** properties include a set of values that appear on the campaign statistics element if you select the corresponding check boxes.

- **Label** – Data label that provides details on a particular data point on the **Pyramid** chart type.

> The **Lable** option is active only when the **Pyramid** chart type is selected. The **Pyramid** chart type uses highcharts-labels and highcharts-data-label to show labels, values, and percents on the chart.

- **Value** – Number of participants for each campaign status.
- **Percent** – Percentage of participants for each campaign status.

To apply changes to all **Campaign Statistics** elements in your report, click the **Apply All** button.

Embed Report Element

In the **Embed Report Element** section, you can generate a code snippet and URL to use the **Campaign Statistics** report element outside of the EFM application. For example, you can place it into an IFrame on custom webpage. The HTML code of the report element is generated automatically. You can also configure the width and height of the **Campaign Statistics** element by editing the code snippet in an HTML or text editor.

For more information, see Manage Embed Report Element, page 970 and Publish widget to URL, page 972.

Add Campaign Statistics report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Campaign Statistics** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Campaign Statistics** report element.

With the **Campaign Statistics** report element, you can add a chart of your survey campaign status to your report.

The campaign status is displayed as a pie chart for total participants with sectors for different participant statuses. Hover over the status on the pie chart to view the count and percentage of participants that represent it. The **Campaign Statistics** report element shows the following participant statuses: Sent (or In Queue), Confirmed Received, Started, Undeliverable, Completed, Bounced Back, Unsubscribed, Branched Out, and Over Quota (for definitions of the statuses, see Participant status, page 584).

You can add the **Campaign Statistics** element to your report either in the **Add a Report Element** left pane or on the **Add** menu.

> The **Campaign Statistics** report element is not applicable to the **Profile** reports.

Procedure

1. In the **Add a Report Element** area, click the **Campaign Statistics** report element.
2. In the **Select data for your report element** dialog box, select the survey.

> The **Campaign Statistics** report element is calculated only for the surveys that have **Open** or **Closed** status.

3. Click **Add**.
4. To change element properties, use the element editor in the left pane.

   For more details, see Campaign Statistics report element, page 839.
5. To manage your **Campaign Statistics**, use the toolbar in the upper-right corner of the **Campaign Statistics** dialog box. You can add a **Campaign Statistics** to dashboard, filter, copy, move, or delete it.

> The **Campaign Statistics** element is added to the Executive Summary Report by default. When you create the Executive Summary Report, campaign statistics automatically appears as the first element on the first page of the report.

Gauge report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Gauge** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Gauge** report element.

With the **Gauge** report element, you can view your scale-based questions as a gauge. The gauge element is divided into three segments. You can customize your gauge element by selecting the color and width for each segment.

You can create the **Gauge** element by using the following questions:

- **Choose One**
- **Fill in the Blank** (Numeric)
- **Matrix with Choose One**
- **Fill in the Blank** (Numeric)
- **Choose One with Image**
- **Scale Slider**

The **Gauge** report element differs in displaying results for some question types:

- For the **Choose One** questions, the left part of the gauge is the first choice value (1) with the label and the right part of the gauge is the last choice value (n) with the label. The pointer shows the mean of all responses value for the question.
- For the numeric questions, the left part of the gauge is the lowest numeric value of all response data and the right part of the gauge is the highest numeric value of all response data. The pointer shows the mean of all responses value for the question.

You can add the Gauge element to your report either in the **Add a Report Element** left pane or on the **Add** menu.

After inserting the gauge element into your report, the element editor panel to the left shows a number of collapsible menus, including:

- Report Element
- Appearance
- Data
- Displayed Values
- Segments
- Embed Report Element

Report Element

In the **Report Element** section of the **Gauge** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** properties include the **Type**, **Question**, **Labels**, and **Caption** sections.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change the question. The gauge element is updated to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:
  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Report Values** - Select the check box to display the report values on your report element.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type the text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

In the **Appearance** section, you can change the look and feel of the gauge element in your report. The section provides a number of customization properties.

- **Background Color** – Select the background color for the gauge scale from the palette.
- **Border Color** – Select the color for the border of the gauge element from the palette.
- **Border Width** – Adjust the width of borders in your gauge element in pixels.
- **Border Radius** – Change this value to increase or decrease the roundness of border corners in your gauge element.
- **Maximum Characters** – Set the maximum number of characters for the labels on your gauge element.
- **Size Charts Automatically** – Select this check box to make the gauge element fit the current window size automatically.
- **Width** – Set the width of the gauge element in pixels.
- **Height** – Set the height of the gauge element in pixels.

> The **Width** and the **Height** options become available if you clear the **Size Charts Automatically** check box.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Gauge** elements in your report, click the **Apply All** button.

Data

In the **Data** section, you can control the sort order and decimal places displayed in the gauge element. The section includes options to manage the content in your **Gauge** element.

- **Reverse Order** – Use this check box to view the values in an opposite order. You can use this option together with the net score. Select the **Net Score** radio button in the **Displayed Values** section.
- **Decimal Places** – Use this text box to set the number of decimal places for the values on the gauge element.

To apply changes to all **Gauge** elements in your report, click the **Apply All** button.

Displayed Values

The **Displayed Values** properties include a set of values that appear on the gauge element if you select the corresponding radio buttons.

- **Mean** – Select this radio button to show the sum of values divided by the number of values (average value).
- **Net Score** – Select this radio button to show the difference between the top and bottom items of a rating scale, which reflects the customer's satisfaction.

> For the **Net Score**, the gauge range is set from -100 to 100.

- **Median** – Select this radio button to show the numerical value in the center after ordering all the values. It has an equal number of values below and above it.
- **Mode** – Select this radio button to show the value representing the highest frequency.

To apply changes to all **Gauge** elements in your report, click the **Apply All** button.

Segments

In the **Segments** section, you can set the look of the segments of your gauge element, selecting the color and width for each segment.

The section is divided into three sections – **Segment 1**, **Segment 2**, and **Segment 3** – each providing segment width and color properties. See description below.

- **Segment End** – Set the width of the segment.
- **Color** – Select the color for the segment from the palette.

Segment 3 has only the **Color** property as its width is determined by the **Segment End** property of the **Segment 1** and **Segment 2** sections.

Embed Report Element

You can embed a **Gauge** element into a custom page to share your report results outside of the product by generating a code snippet and URL to embed the **Gauge** report element into external applications.

The functionality is available in the **Embed Report Element** section in the report designer.

You cannot drill down into the embedded gauge element to view responses.

You can use the code snippet to place the **Gauge** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the gauge element by editing the code snippet in an HTML or text editor.

You can use the URL to place the **Gauge** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the gauge element on your custom page.

Add Gauge report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** side tab > create a new report or open an existing one > **Add a Report Element** panel > add the **Gauge** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add a Report Element** panel > add the **Gauge** report element.

You can add the **Gauge** report element to the report either in the **Add a Report Element** left pane or on the **Add** menu.

Procedure

1. In the **Add a Report Element** area, click the **Top Box** report element.
2. In the **Select data for your reportelement** dialog box, in the **Questions** menu, select the source question.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Bar Chart Organization Cross tab element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Organization Report Elements** panel > add the **Bar Chart Organization Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Organization Report Elements** panel > add the **Bar Chart Organization Cross-tab** report element.

With the **Bar Chart Organization Cross-tab** report element, you can view the hierarchy in cross-tab report that shows the response mean in the form of the bar with the percentage.

When adding a new report element, you can choose to view the results by organizations or employees. If you choose the view by an organization, the results gathered from all the child organizations that belong to the main organization are also added to the report. If you choose the view by employees, the results gathered from all the employees that belong to the selected organization are included to the report.

You can add the **Bar Chart Organization Cross-tab** report element to the report based on a survey, profile, or data set that contains the External ID System Question. Only organizations and employees that have associated data for the report scope are included in the report.

When you add the **Bar Chart Organization Cross-tab** element to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Broken Down By**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The **Bar Chart Organization Cross-tab** element is updating to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Broken Down By** – The breaking-down organization. The **Broken Down By** menu shows the organizations to which user has access. The **Bar Chart Organization Cross-tab** element updates to show data from the newly selected organization. You can view the results by users or organizations by selecting the corresponding option.
- **Labels** – The customizing properties. Use this section to customize the following properties:

- **Show Question Heading** - Select the check box to show the question heading.
- **Show Question Text** - Select the check box to show the question text.
- **Show Question Description** - Select the check box to show the question description.
- **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

The **Appearance** properties include the **Row** and **Header** sections, both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.
- To apply changes that you made to the **Appearance** properties, click **Apply All**.

Several Appearance properties can be assigned throughout the report with the report theme.

Data

The **Data** properties include the **Decimal Places** option. Use this text box to define the decimal places for the values that the bar chart cross-tabulation shows.

To apply changes that you made to the **Data** properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in the **Bar Chart Organization Cross-tab** element if you select the corresponding check boxes.

- **Question Count** – Select this check box to view the total number of responses for the selected question in your report.
- **Mean** – Select this check box to show the sum of values divided by the number of values (average value).
- **Values** – This option shows the percentage of the response choices selected by respondents.
- **Bars** – This option shows the bar with the percentage of the response choices selected by respondents.

To apply changes that you made to the **Displayed Values** properties, click **Apply All**.

Add Bar Chart Organization Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Organization Report Elements** panel > add the **Bar Chart Organization Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Organization Report Elements** panel > add the **Bar Chart Organization Cross-tab** report element.

You can add the **Bar Chart Organization Cross-tab** report element to the report either in the **Organization Report Elements** left pane or on the **Add** menu.

Procedure

1 In the **Organization Report Elements** area, click the **Bar Chart Organization Cross-tab** element.

2 In the **Select data for your report element** dialog box, in the **Questions** menu, select the source question.

3 In the **Select Organization** list, define the organization.

4 Select the **Organizations** or **Users** option to view the results by organizations or users.

> You can select another source for your report element in the left pane of the dialog box. To search for the specific survey, type a partial or whole survey name in the search box, and then click the **Search** button. The list of surveys that match your input displays.

5 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Top Box Organization Cross-tab element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Organization Report Elements** panel > add the **Top Box Organization Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Organization Report Elements** panel > add the **Top Box Organization Cross-tab** report element.

With the **Top Box Organization Cross-tab** report element, you can view the top box cross-tabulation of the responses gathered by organizations.

When adding a new report element, you can choose to view the results by organizations or employees. If you choose the view by an organization, the results gathered from all the child organizations that belong to the main organization are also added to the report. If you choose the view by employees, the results gathered from all the employees that belong to the selected organization are included to the report.

You can add the **Top Box Organization Cross-tab** report element to the report based on a survey, profile, or data set that contains the External ID System Question. Only organizations and employees that have associated data for the report scope are included in the report.

When you add the **Top Box Organization Cross-tab element** to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Broken Down By**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The **Top Box Organization Cross-tab** element updates to show data from the newly selected question.
- **Broken Down By** – The breaking-down organization. The **Broken Down By drop-down** list shows the organizations that the user has access to. The **Top Box Organization Cross-tab** element updates to show data from the newly selected organization. You can view the results by users or organizations by selecting the corresponding option.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** and **Broken Down By** menus. For more information, see Map survey or profile to file import, page 582.

- **Labels** – The customizing properties. Use this section to customize the following properties:

- **Show Question Heading** - Select the check box to show the question heading.
- **Show Question Text** - Select the check box to show the question text.
- **Show Question Description** - Select the check box to show the question description.
- **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
- **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.

- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

The **Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select web-compatible font sizes for data and header text.

To apply changes that you made to the **Appearance** properties, click **Apply All**.

> Several Appearance properties can be assigned throughout the report with the report theme.

Data

The **Data** properties include the following options:

- **Reverse Order** – Use this check box to view the values in an opposite order.
- **Decimal Places** – Use this text box to define the decimal places for the values that the top box cross-tabulation shows.
- **Range of Top Group** – Use this text box to define the number of choice items to be combined when generating the top box calculation. The default is set to the top 2. For example, on a five-point scale all responses of 1 and 2 will be combined. The top box calculation can be set to 1, 2, or 3 choices.
- **Range of Bottom Group** – Use this text box to define the number of choice items to be combined when generating the bottom box calculation. The default is set to the bottom 2. For example, on a five-point scale all responses of 4 and 5 will be combined. The bottom box calculation can be set to 1, 2, or 3 choices.

To apply changes that you made to the **Data** properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in the **Top Box Organization Cross-tab** element if you select the corresponding check boxes.

- **Question Count** – Select this check box to view the total number of responses for the selected question in your report.
- **Top** – The number of the responses in the top choice group.
- **Neutral** – The number of the responses in the neutral choice group.
- **Bottom** – The number of the responses in the bottom choice group.
- **Percent of Row Total** – This option shows the percentage in addition to the number of responses for each response choice.
- **Bar Chart Labels** – Select this check box to show the percentage labels on responses bar chart.

To apply changes that you made to the **Displayed Values** properties, click **Apply All**.

Add Top Box Organization Cross-tab report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Organization Report Elements** panel > add the **Top Box Organization Cross-tab** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Organization Report Elements** panel > add the **Top Box Organization Cross-tab** report element.

You can add the **Top Box Organization Cross-tab** report element to the report either in the **Organization Report Elements** left pane or on the **Add** menu.

Procedure

1 In the **Organization Report Elements** area, click the **Top Box Organization Cross-tab** element.

2 In the **Select data for your report element** dialog box, in the **Questions** menu, select the source question.

3 In the **Select Organization** list, define the organization.

4 Select the **Organizations** or **Users** option to view the results by organizations or users.

> You can select another source for your report element in the left pane of the dialog box. To search for the specific survey, type a partial or whole survey name in the search box, and then click the **Search** button. The list of surveys that match your input displays.

5 Click **Add**.

The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Organization Cross-tab Table element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Organization Report Elements** panel > add the **Organization Cross-tab Table** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Organization Report Elements** panel > add the **Organization Cross-tab Table** report element.

With the **Organization Cross-tab Table** report element, you can view the hierarchy in cross-tab report showing each response in a table.

When adding a new report element, you can choose to view the results by organizations or employees. If you choose the view by an organization, the results gathered from all the child organizations that belong to the main organization are also added to the report. If you choose the view by employees, the results gathered from all the employees that belong to the selected organization are included to the report.

You can add the **Organization Cross-tab Table** report element to the report based on a survey, profile, or data set that contains the External ID System Question. Only organizations and employees that have associated data for the report scope are included in the report.

When you add the **Organization Cross-tab Table** element to your report, the element editor panel to the left shows a number of collapsible menus including:

- Report Element
- Appearance
- Data
- Displayed Values

Report Element

The **Report Element** properties include the **Type**, **Question**, **Broken Down By**, **Labels**, and **Caption** sections, providing a number of customization properties.

- **Type** – The selected report element type.
- **Question** – The source question. Use the **Question** menu to change a question. The **Organization Cross-tab Table** element updates to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Broken Down By** – The breaking-down organization. The **Broken Down By** menu shows the organizations to which the user has access. The **Organization Cross-tab Table** element updates to show data from the newly selected organization. You can view the results by users or organizations by selecting the corresponding option.
- **Labels** – The customizing properties. Use this section to customize the following properties:

  - **Show Question Heading** - Select the check box to show the question heading.
  - **Show Question Text** - Select the check box to show the question text.
  - **Show Question Description** - Select the check box to show the question description.
  - **Align Question Text and Description** - Select the needed option from the list to align the question text and description.
  - **Show Source Citation** - Select the check box to display the element data source if the report uses more than one data source.
- **Caption** – A brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Appearance

The **Appearance** properties include the **Row** and **Header** sections both providing a number of customization properties.

- **Color** – Select the background color for the data or header rows from a palette.
- **Text Color** – Select the text color for data or header rows from a palette. It is recommended that contrasting color selections be made when changing the color and text color settings.
- **Font Name** – Select web-compatible fonts for data and header text.
- **Font Size** – Select of web-compatible font sizes for data and header text.

To apply changes that you made to the **Appearance** properties, click **Apply All**.

Several Appearance properties can be assigned throughout the report with the report theme.

Data

The **Data** properties include the **Decimal Places** option. Use this text box to define the decimal places for the values that the cross-tabulation shows.

To apply changes that you made to the **Data** properties, click **Apply All**.

Displayed Values

The **Displayed Values** properties contain a set of values that appears in the **Organization Cross-tab Table** element if you select the corresponding check boxes.

- **Count** – Select this check box to view the number of responses for each response choice and total number of responses for the selected question in your report.
- **Percent of Row Total** – This option shows the percentage in addition to the number of responses for each response choice.
- **Bars** – This option shows the bar with the count for each response choice.

To apply changes that you made to the **Displayed Values** properties, click **Apply All**.

Text report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add Other Content** panel > add the **Text** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add Other Content** panel > add the **Text** report element.

The Text Element feature enables you to insert text into a report. You can add a **Text Element** by clicking the **Text** button in the **Add Other Content** section on the **Analyze** tab. Enter text and format it by using the editing toolbar.

The edit box provides you with a number of editing options. Standard options include:

- Font Size
- Bold
- Italic
- Underline
- Font Color
- Background Color

Add Text report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add Other Content** panel > add the **Text** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add Other Content** panel > add the **Text** report element.

You can add the **Text** report element to the report either in the **Add Other Content** left pane or on the **Add** menu.

Procedure

1 In the **Add Other Content** area, click the **Text** element.

2 In the **Report Element** section, enter text into the edit box.

3 Customize your text by using the editing toolbar.

Your text element appears in the right content area in real time. To delete the text element, hover your pointer over the **Text** element in the right content area, and then click the icon.

Question report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add Other Content** panel > add the **Question** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add Other Content** panel > add the **Question** report element.

You can add a specific survey question to your report. You can add the **Question** element to the report either in the **Add Other Content** left pane or on the **Add** menu.

When you add the question element into your report, the element editor panel to the left shows the **Report Element** collapsible menu. The Report Element properties include the **Type**, **Question**, and **Caption** sections.

- **Type** – Shows the selected report element type.
- **Question** – Shows the survey question added to the report. Use the **Question** menu to change a question. The question element updates to show data from the newly selected question.

> If the data channel is defined for the survey, the columns from the corresponding file import are also available in the **Question** menu. For more information, see Map survey or profile to file import, page 582.

- **Caption** – Shows a brief description below your report element. Type your text in the edit box and customize its font size and style. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** menus. To check the spelling, click **Spell Check**.

Add Question report element

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > **Add Other Content** panel > add the **Question** report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > **Add Other Content** panel > add the **Question** report element.

You can add the **Question** element to the report either in the **Add Other Content** left pane or on the **Add** menu.

Procedure

1. In the **Add Other Content** area, click the **Question** element.
2. In the **Select data for your report element** dialog box, in the **Questions** menu, select the source question.

> You can select another source for your report element by using the **Data Source** option at the top of the dialog box.

3. Click **Add**.

   The element editor opens in the left pane, and the element appears in the right pane. You can change the element properties in the element editor.

Showing report values

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** tab > create a new report or open an existing one > add a report element.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > create a new report or open an existing one > add a report element.

You can view the report values on your report elements to better understand how the values are calculated.

If you set the report values for choices when designing a survey, they can be displayed on your report elements later on the analyze stage. This option is applicable to all questions that support the **Report Value** option. You can activate this option by selecting the **Show Report Values** check box on the **Report Element** menu. This option is active by default.

The **Show Report Values** option is available for the following report elements:

- Frequency Table
- Frequency Chart
- Summary Table
- Summary of Means
- Cross-tab
- Cross-tab Chart
- Top Box Cross-tab
- Gauge

Chapter 16

Report Viewers

Topics

Report Viewer Grid

Navigation

Log into the product as a report viewer > **Report & Analyze** tab > **Project Reports** tab > **Reports** page.

You can share your saved reports with other users giving them the view access to your reports. With a **Report Viewer** as a security role, you can view the reports shared with you on the **Reports** page.

When you log in as a Report Viewer, the **Reports** grid shows the saved reports to which you have access.

The following columns are available on the **Reports** page:

- **Report Title** – Name of a report. Click the report name to view the report.
- **Primary Source** – Name of the project (survey or profile) to which the report belongs.
- **Source Type** – Project type (survey or profile) to which the report belongs.
- **Owner** – The user to whom the report belongs.
- **Last Modified** – The last time when the report was changed.
- **Published** – The publishing status of the report.

You can open multiple reports at the same time with each report in a new window.

By default, the **Reports** grid shows the first 10 reports. To view more saved reports per page, use the **View per Page** option at the bottom of the **Reports** grid. Select the **25**, **50**, or **100** link to display more saved reports. In addition, if the **Reports** grid is longer than one page, you can navigate between the pages using the navigation arrows in the lower-right corner.

Searching for a report

To search for a report from the **Reports** grid, enter the name, source, or owner of the report in the **Search** text box on the toolbar, and then click **Search** next to the text box. The results of the search appear in the grid with the corresponding notification. You can click the **Clear** link to cancel the search parameters and view all reports.

View a report

Procedure

1 In the **Reports** grid, click the report you want to view. The report preview window opens.

The navigation and exporting options available on the title bar depend on individual viewer rights based on assigned user role.

2 Navigate through the report pages by clicking the **Previous Page** and **Next Page** buttons or the **Page #** menu. If report pages are renamed, the **Page #** menu contains those names.

3 To export the report data to the Microsoft Word, Microsoft PowerPoint, or Adobe PDF format and create a cluster report to view the report results outside the product, click the **Download Report** menu.

For the steps on how to download the reports, see Downloading reports, page 1012 and Cluster Reports, page 1013.

Report Viewer Filters

Navigation

Log into the product as a report viewer > **Report & Analyze** tab > **Project Reports** tab > **Reports** page.

A report viewer can see the filter defined by the report author to know how the report is filtered. Report viewers cannot remove the filter set by the report author. They can create and remove their own filters.

There are two filter types:

- **Filter Using** – Shows the filter created by the report author. It is the primary filter on the report.
- **Report Viewer Filter** – Shows the filter created by the report viewer. Any filter defined by the report viewer appears on top of the existing filter.

The applied filters merge together and show data that meets all defined criteria.

The filters are defined at the report level, not at the report element level.

Create a filter

Report viewers can create filters for the report if report authors activate this functionality for them when sharing the report.

Procedure

1. On the **Reports** page, click the name of the report that you want to filter. The report opens in a new window.
2. On the toolbar, click the **Filter Report Data** button.
3. In the **Filter Report Data** dialog box, in the question list, select the survey question by which you want to filter the report data.
4. Select the appropriate expression in the list.
5. In the value list, select the response choice by which you want to filter.
6. To save the filter criteria, click the **Save** link.

Click the **Add Another Criteria** link to add more criteria.

7. Click **OK**.

Remove a Filter

Procedure

1. On the **Reports** page, click the name of the report.
2. Click the **Clear** link next to the filter that you want to remove.

Report viewers cannot remove the filter defined by the report author.

Activating Filters for Report Viewers

Navigation

Report & Analyze tab > **Survey Reports** tab > **Reports** page > select a report > **Share** menu > **Select Other Users** option.

Report authors can define whether a report viewer can filter the shared report. When sharing a report with other users, a report author can select the **Allow report viewers to filter the data being shared with them** check box to turn the filtering on for the report viewers. By default, this check box is clear.

When filtering is activated, the **Filter Report Data** button is available for report viewers when they view a report. Report viewers can create and remove their own filters, but they cannot remove the filter set by the report author.

The filters are defined at the report level. So, when the report author activates the filtering functionality, the filtering is turned on for all the report viewers with whom the report is shared. If you, as a report author, want to share the same report with other users, but not allow them to filter your report, you need to copy the report, and then share it without selecting the **Allow report viewers to filter the data being shared with them** check box.

Activate a filter for report viewers

Procedure

1. On the **Reports** page, select the check box next to the report that you want to share.
2. On the **Share** menu, click **Select Other Users**. The report sharing dialog box opens.
3. In the **Select Users** dialog box, in the **Users** section, select the name of the user with whom you want to share your report.
4. Click the right double arrows button to allow this user to view your report.

   The user name is moved to the **View Access** section.
5. To activate the filter for the selected users, select the **Allow report viewers to filter the data being shared with them** check box.
6. Click **OK**.

Report viewers can filter the shared report using the **Filter Report Data** button.

Images

Topics

Images side tab

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Images** side tab.

Use the **Images** side tab to view, sort, size, delete, and rate images uploaded by respondent when answering the **Image Upload** question.

The **Images** side tab is available only if the survey contains the **Image Upload** question.

On the toolbar the following options are available:

- **View** – Use this menu to select images that you want to view on the **Images** page. For example, you can select to view all images or those images that are the answers to certain questions.
- **Sort** – Use this menu to specify the order in which images will be displayed on the **Images** page. You can sort images by rate or by date.
- **Size** – Use this slider to view and change the thumbnail size for images (you can select one of ten available values).

You can specify what thumbnail details will be displayed or delete the selected response images by using the **Actions** menu. For more information, see Define thumbnail details, page 869 and Delete images, page 870.

You can view up to 120 thumbnails on the **Images** page. If there are more than 120 images uploaded by the respondent, the **Show More Images** button appears. After clicking this button, other image thumbnails are displayed.

When the respondent uploads the image, it is resized to 725 × 725 pixels and is converted to .jpg format. The size of a thumbnail is 256 × 256 pixels.

You can rate the thumbnails on the **Images** page by clicking the corresponding rate on the thumbnail. To remove the rating, click the  icon.

You can filter images according to their rate, by clicking the needed rate in the **Rating** scale and by clicking one of the following values in the menu: **and Higher**, **and Lower**, or **Exactly**. To filter images according to their tags, type the tag name or part of the tag name in the **Tags** text box, and then click **Search**.

The rating option is not editable if the **Edit Responses** permission is not activated for your user role.

Upon clicking  on the image, the **Image** dialog box opens, where you can view the image itself, date it has been uploaded, location it has been taken at, and tags added to the image. You can also download the image by clicking the **Download Image** link, rate the image, and change the rating previously added to the image.

Define thumbnail details

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Images** side tab > **Actions** menu > **Details** option > **Thumbnail Details** dialog box.

Select the following check boxes in the **Thumbnail Details** dialog box to define what specific details to display on the **Images** side tab:

- **Image** – Select this option to view the thumbnail name.
- **Date** – Select this option to view the date when the response image was downloaded.
- **Rating** – Select this option to rate thumbnails and to view the existing rates.

Before you begin

- Verify that respondents uploaded images to answer the **Image Upload** question in your survey.

Procedure

1. From the **Analyze** tab, navigate to the **Reports** page.
2. In the left pane, click the **Images** side tab.
3. On the **Actions** menu, click the **Details** option.
4. In the **Thumbnail Details** dialog box, select the information to be shown in each thumbnail on the **Images** side tab.

If you change the thumbnail size after defining its details, this thumbnail defaults to the original view.

Delete images

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Images** side tab.

You can view and delete the response images from the **Images** side tab. The response images will be also deleted from the **Response Manager** grid.

Procedure

1. From the **Analyze** tab, navigate to the **Reports** page.
2. In the left pane, click the **Images** side tab.
3. On the **Images** page, choose the image thumbnail you want to delete by selecting the check box or by clicking anywhere on the thumbnail.
4. On the **Actions** menu, click **Delete**.
5. In the confirmation dialog box, click **Delete**.

> The **Delete** option is not available if the image you want to delete is not selected or if the **Edit Responses** permission is not activated for your user role.

Filtering images

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Images** side tab > **Filter** option.

You can filter the collected images based on the respondent information to view the certain results only. You can apply the **Data**, **Date**, and **Other** filters to the images.

Data filter

The **Data** filter is based on questions and columns. In the **Data Filter** section, click the **Add Another Criteria** link to specify the following:

- **Source** – Click the **My Survey** link, and then click **Current Survey** to make questions from the survey available as criteria or click **Columns** to make the **Participant Information** or **Respondent Location** data from the **Response Manager** available as criteria.
- **Filter parameter** – In the menu, click the question or column by which you want to filter your images.
- **Expression** – In the menu, click the expression to make a comparison between **Filter parameter** and **Value**. The options depend on the **Filter** parameter.
- **Value** – In the menu, click the response choice for comparison. The options depend on the question type and column.

> You can save the filter criterion by clicking the **Save** link, or remove and move up or down the filter criterion by clicking the corresponding buttons.

You can have a combination of the **Current Survey** and **Columns** filtering criteria. If you add multiple criteria, you can combine them using the following **Match** options:

- **All Criteria** – All the criteria are met.
- **At Least One Criterion** – At least one of the criteria is met.
- **Advanced** – Select the parentheses and the **And** or **Or** to define that one of the filters linked together is true and to define that two or more filters are true for the responses included in the report correspondingly.

> The **Add Another Criteria** link is available if you have at least one type of question different from the **Image Upload** question type.

Date Filter

The **Date** filter is based on the date responses were last modified and on the period of time they were created. In the **Date Filter** section, the following options are available:

- **Select Date Field** – Select an option on the **Select Date Field** menu to filter responses based on the date they were created. The following options are available:
  - **None** – No date filters.

    - **Started Date** – Based on the date the survey was started.
    - **Modified Date** – Based on the date the survey was last changed.
    - **Completed Date** – Based on the date the survey was submitted.
- **Time Period** – Select an option on the **Time Period** menu to filter the responses created during a certain period of time.

If you want to set the default values for the **Date Filters**, click the **Clear All Date Filters** link.

Other

The **Other** filter is based on whether the survey is completed or not. Select the **Only show completed responses** check box to include only completed responses.

Click **OK** to save the filters criteria. After that, you can view the filters criteria on the **Images** page. You can edit the **Filter Response Data** dialog box by clicking the **edit** link and you can clear the filters criteria by clicking the **clear** link.

Export images

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Reports** page > **Images** side tab.

You can export images from the **Images** side tab, and then use them locally. Images are exported as full-size .jpg files. You can export all images or select which images you want to export. Also, you can apply filter to the images to be exported.

> If an email address is associated with the participant who uploaded the image, the file name of the exported image is Record ID - Q# - Email Address.jpg; otherwise, the file name is Response ID - Q#.jpg.

Procedure

1. On the **Images** side tab, click the **Export** button, or select this option on the **Actions** menu.
2. In the **Export Images** dialog box, in the **Images** and **Filter** sections, select the needed options.

> The **Current Filter** is the filter defined by a user including rating and tag search.

3. Click **Next**.
   A link to the generated .zip file is displayed in the **Export Images** dialog box. Click the link to download the exported images.

> If export takes longer than the **Email Confirmation for Long Processes** time limit defined on the **My Account** page, you can close the **Export Images** dialog box. When images are exported, you will receive an email message with a link to the generated .zip file.

Chapter 18

Advanced Text Analytics

Topics

Advanced Text Analytics overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Analyze** tab > **Export Text Analytics** button > **Advanced Text** page.

You can export the survey response data to the advanced text analytics as a new project to analyze respondents' sentiment based on their responses to the **Essay** questions in your survey.

> You can perform advanced text analysis only after opening your survey.

The exported surveys are counted against your credits. Each answered **Essay** question is counted as one credit. Each survey can have multiple **Essay** questions. Also, every additional 2048 characters in the response is an additional credit.

Verbatim credits are valid for verbatim in size of 2048 characters or less. For any verbatim exceeding 2048 characters, you need to purchase one additional credit per increment of 2048 characters. You are also re-charged for previously exported responses if additional **Essay** questions are selected or any changes are applied to the previously exported responses.

> You can export all question types to the Text Analytics, but advanced text analysis is performed for the **Essay** questions only.

On the **Advanced Text** page, the following sections are available:

- **Login** – Enter your user name and password for the Text Analytics in the corresponding fields.
- **Project Name** – The automatically generated name of your project based on the survey name and ID to guarantee uniqueness.
- **Columns** – Select the survey questions to export.

  The following options are available:

  - **All** – The advanced text analysis is performed for all survey questions.
  - **Selected** – You can select the questions that you want to export for advanced text analysis.

  To open the question selection dialog box, click **Configure**, and then select the check box next to the survey question that you want to export.

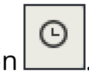
> To export all survey questions, select the check box next to the survey name.

> The **Configure** button is active only if the **Selected** option is selected.

- **Schedule** – Define the time to transfer the data for the advanced text analysis. Records that are modified after the initial export are updated.

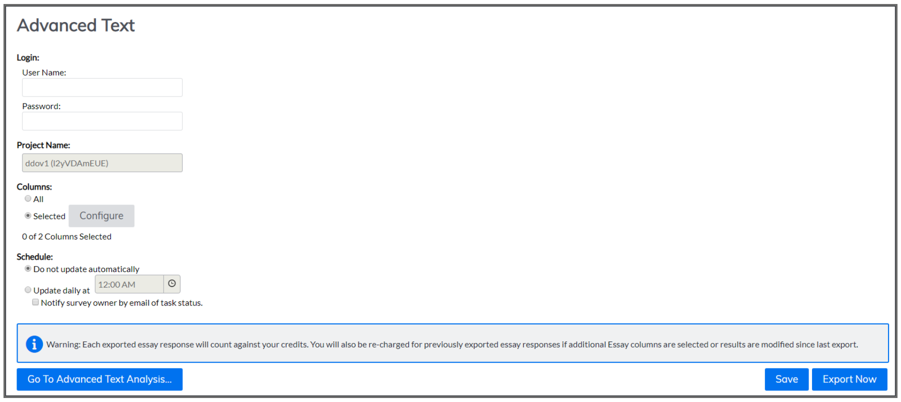
  The following options are available:

  - **Do not update automatically** – The new or modified responses are not exported to the Text Analytics automatically since the initial export.
  - **Update daily at** – The new or modified responses are exported at scheduled time since the last update. The existing project in Text Analytics is updated.

To open the time picker, click the **Time View** icon .

Define the project updating schedule either using the text box or the time picker.

- **Notify survey owner by email of task status** – The survey owner receives daily notification via email when scheduled responses export is performed, when the option is selected.



The Advanced Text page

To open the Text Analytics login page in a new window, click **Go to Advanced Text Analysis**.

To save the defined set of exporting options, click **Save**.

To export the survey response data to the Text Analytics, click **Export Now**.

Advanced Text Analytics–Export responses

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Analyze** tab > **Export Text Analytics** button > **Advanced Text** page.

You can export the survey response data to the advanced text analytics as a new project.

> You can export all question types to the Text Analytics, but advanced text analysis is performed for the **Essay** questions only.

Procedure

1. On the **My Surveys** page, create a new survey or open a saved one that contains the **Essay** questions.
2. Go to **Analyze** tab > **Choose How to Report on Your Survey** page, and then click the **Export Text Analytics** button.
3. On the **Advanced Text** page, define the export options for your project.
4. For the initial export, click **Export Now**.

Advanced Text Analytics–Administrator control

Navigation

Configuration tab > **General** tab.

The advanced text analytics permission and URL are provided by a system administrator only.

Group administrators can control the workgroup members' access to the advanced text analytics.

> The Advanced Text Analytics feature is available only if you have a license for it and Advanced Text Analytics is enabled for a workgroup.

You can use the **Batch Size** option to control the number of records to be exported to the Text Analytics at one time. The export task is triggered each hour. If the Text Analytics job is not completed within an hour, you receive the following message: “Waiting for previous text analytics job to complete–system will retry in 1 hour”.

To see the status of Text Analytics job, go to **Administration** tab > **System Tasks** tab.

The minimum batch size value is 500. The maximum batch size value is 100,000. The default value is **100,000**.

The advanced text analytics is available for all users having permissions to create reports.

> For details on the advanced text analysis, see Advanced Text Analytics–Export responses, page 877.

Enable Advanced Text Analysis for a workgroup

Procedure

1. Go to **Configuration** tab > **General** tab.
2. In the **Advanced Text Analytics** section, clear the **Disable Export for Text Analysis** check box.
3. Specify the batch size value.
4. Click **Save Setup**.

Chapter 19

Text Analytics

Topics

Text Analytics report elements overview

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new report > **Report** designer page > **Add** menu.

Respondents provide a lot of valuable feedback when answering the Essay questions in the survey. You can analyze all feedback and create statistic charts based on this data. With the Text Analytics report elements added to the EFM reporting functionality, you can view the analyzed verbatim responses for Essay and Matrix with Essay side questions. The data is broken down by top level categories, category leaves, terms, and relationships and shows a sentiment for each of them.

Sentiment illustrates opinions, emotions, and attitudes associated with an element within an interaction, expressed through a word or phrase, from very positive to extremely negative.

Sentiment types are represented as coefficients and range from positive to negative:

- Negative -5 to -0.5
- Neutral -0.4 to 0.4
- Positive 0.5 to 5

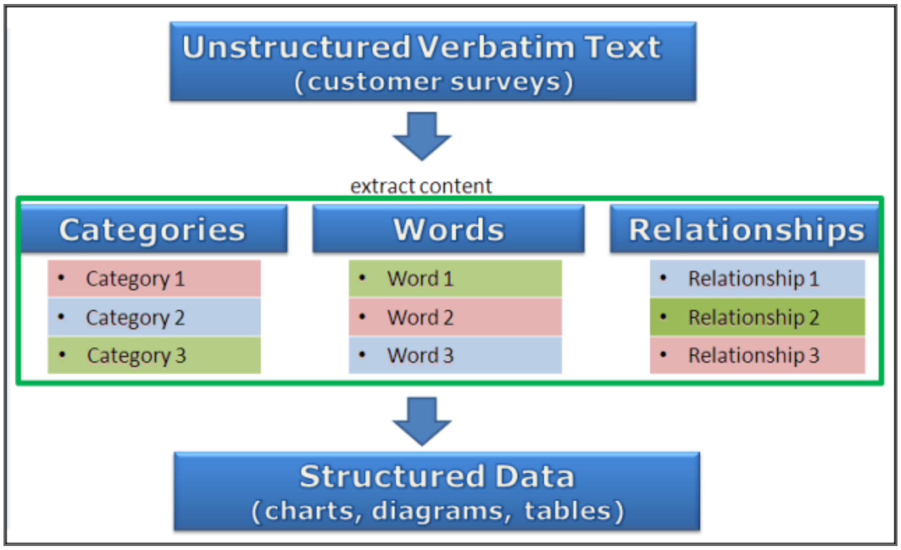
> If your Text Analytics data is not updated or used for more than 30 days, it is deleted due to inactivity.

You can add the following Text Analytics report elements:

- **Sentiment Chart** – Stacked bar chart that shows the sentiment breakdown by topic for a question.
- **Sentiment Summary** – Bar chart that shows the overall sentiment breakdown for the question.
- **Sentiment Table** – Table that shows the verbatim analysis results.
- **Sentiment Trend Table** – Table that shows the verbatim analysis results over the selected date range.
- **Word Cloud** – Set of words represented as a cloud that appears in different size and color, thus giving greater prominence to words that occur more frequently in the source text.
- **Heat Map** – A graphical representation of data that appears in different size and color. The size indicates volume of words that occur more frequently in the source text.
- **Trend Chart** – Chart that shows the top ten items as trend lines.

> The Text Analytics report elements are available only if you have a license for the Embedded Text Analytics.

A specific set of steps needs to be performed to get the analyzed data on these report elements.Text Analytics structures responses by identifying the categories and relationships between those categories and assigning the sentiment to them. The analyzed data is returned to the EFM application by Web Services and is represented in the report elements.



The data structuring

You can perform text analysis only after opening your survey.

Example: Data Structuring

I highly recommend the NY Standard – superior service. Fantastic rooms. Mind-blowing views! Book it!

- Top Level Categories: Room, Service, View
- Terms: highly, recommend, NY Standard, fantastic
- Relationships: Room > Impression, View > Reaction

Text Analytics–Role-based access

Navigation

Administration tab > **Roles** tab.

A survey administrator can control if the workgroup members can add the Text Analytics elements to the report by creating a new role or editing the existing ones. By default, the **Add Text Analytics Elements** permission is enabled for all roles that have the report editing permission.

This permission bit is available only if you have a license for the Embedded Text Analytics.

Activate the Add Text Analytics Elements functionality

Procedure

1. On the **Roles** tab, click the name of the role that you want to edit.
2. On the **Edit Role** page, in the **Experience** section, select the **Add Text Analytics Elements** check box.
3. Click **Save**.

Insights Embedded Text Analytics

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Insights** side tab > **Insights Embedded Text Analytics** page.

You can use the industry standard classification models to evaluate the verbatims in Text Analytics based on your use case.

> To select the Embedded Text Analytics service, go to the **Configuration** tab > **General** tab. The **Insights** tab is unavailable for workgroups with disabled **Embedded Text Analytics**. For more information, go to Embedded Text Analytics, page 1408.

The **Model Used for Analysis** list provides the theme detection models.When you select a model in the **Model Used for Analysis** list and click **Save**, the model is saved and the verbatims are reevaluated in Text Analytics.

If you change the model after adding the Text Analytics report elements to a report, it will re-export Text Analytics data and reinitiate the analysis with the new model. Changing the model restarts the analysis on any existing Text Analytics report elements.

It takes some time for the report elements, which are based on the model that has not been created yet, to be updated. In such case, the processing status message appears above the report element.

If you are an original report author, you can select the model that introduces changes to the report from the **Model Used for Analysis** list. The **Model Used for Analysis** list is disabled for the reports shared with you by other users. The models available in the **Model Used for Analysis** list vary depending on the selected Embedded Text Analytics service.

For Verint Text Analytics Services provider, the following Text Analytics models are available:

- Customer Experience
- Insurance
- Telco
- Travel and Leisure
- Banking
- Retail

Languages available for Text Analytics report elements are English, German, Spanish, Portuguese, and French. Each language supports all models, but **Retail** model is available only in English.

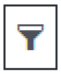
> When **Retail** model is selected, language option on report element level has only English option if it is present in the survey, otherwise—language option is empty.

Text Analytics–Extended data filtering capabilities

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Filter Report Data** button > **Filter Report Data** dialog box > **Data Filter** section.

OR

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > move the pointer over a report element > **Filter** icon  > **Filter Element Data** dialog box > **Data Filter** section.

With new data filtering options, you can filter results in the Text Analytics reports by the culture of participant, campaign status, dates of survey completion, location of respondents, and other participant properties.

On the report level, you can set filtering by clicking the **Filter Report Data** button on the toolbar of any report of analyzed Text Analytics data. For the individual report element, you can set filtering by moving the pointer over any report element, and then clicking **Filter** icon .

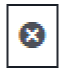
In the **Data Filter** section, you can define the filter criteria based on your report data or individual report element data by clicking the **Add Another Criteria** link.

- **Source** – Click the **My Survey** link to apply the **Current Survey**, **Columns**, or **Profiles** filtering criteria to your report element.
  - **Current Survey** – Questions from the survey are available as criteria.
  - **Columns** – The **Participant Information**, **Respondent System Information**, and **Respondent Location** data from the **Response Manager** grid are available as criteria.
    - **Participant Information** – Enables filtering by the culture of participant, campaign status, dates of survey completion and other participant properties.
    - **Respondent System Information** – Enables filtering by the device type that was used to access the survey.
    - **Respondent Location** – Enables filtering by the city, state/province, ZIP/postal code, or country of respondent.
  - **Profiles** – The **Basic Information** data is available as criterion. Enables filtering by properties that are specific to the panelists.

> The **Basic Information** option is available only if there are Panel campaigns in the current survey.

- **Filter parameter** – Click the question or column by which you want to filter your report data in the list.
- **Expression** – Click the expression in the list to make a comparison between **Filter parameter** and **Value**.

> The options vary depending on the filter type.

- **Value** – Click the response choice for comparison in the list. The available options vary depending on the question type and column.
- **Save** – Click the link or anywhere else in the dialog box to save your criterion.
- **Remove** – Click the **Remove** icon  to delete the filter.
- **Up/Down** – Click the **Up**  or **Down**  arrows to move the selected filter up or down one level in the list. Filters are applied in a sequential manner, and their position in the list is important.

You can have a combination of the **Current Survey**, **Columns**, and **Profiles** filtering criteria. If you add multiple criteria, you can combine them using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The drop-down lists with parentheses and the **And/Or** operators appear next to each criterion. The **And** operator defines that two or more filters are true for the responses included in the report. The **Or** operator defines that one of the filters linked together is true.

In the **Date Filter** section, you can proceed setting filters based on the date when responses are last modified and based on the selected time period.

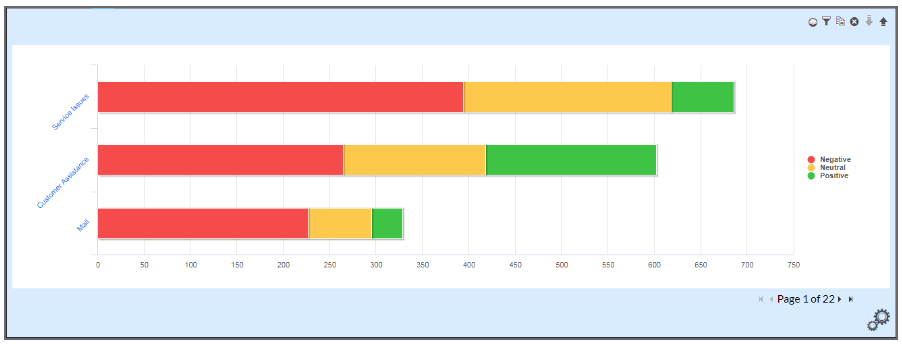
Sentiment Chart element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element.

With the **Sentiment Chart** report element, you can view the sentiment breakdown by topic for a question. The breakdown is between the **Positive**, **Neutral**, and **Negative** sentiments.

You can view data for the top level categories, category leaves, terms, or relationships created within the responses to the question. Data is represented as a stacked bar chart. Categories with the most number of responses appear at the top of the list.



The Sentiment Chart report element

You can drill down into the sentiment chart to view the responses.

To navigate through the pages of the sentiment chart, click the navigation arrows at the bottom of the element.

After adding the sentiment chart into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Sentiment Chart – Report Element, page 890
- Sentiment Chart – Appearance, page 891
- Sentiment Chart – Data, page 893
- Sentiment Chart – Displayed Values, page 894
- Sentiment Chart – Embed Report Element, page 896

Add a Sentiment Chart report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element.

You can use the **Sentiment Chart** report element to analyze responses to the open-ended questions and create comprehensive charts showing a breakdown of content and sentiments.

Procedure

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Sentiment Chart** element.

> You can add the **Sentiment Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the **Essay** and **Matrix with an Essay** side questions, or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Sentiment Chart** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Sentiment Chart** report element when your survey has the **Open** or **Closed** status only.

Sentiment Chart – Report Element

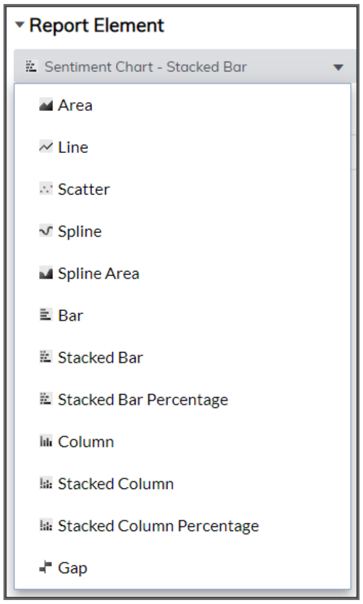
Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Sentiment Chart** element, you can select a chart type and question for the element as well as show or hide the question text, description, and caption for the element.

The **Report Element** section includes the following properties:

- **Chart Type** – The selected report element and chart type. You can select the sentiment chart type from the list.



The Chart Type drop-down list

- **Question** – The source question. You can select the source question from the list. The sentiment chart is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** drop-down lists.
  To check the spelling, click **Spell Check**.

Sentiment Chart – Appearance

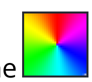
Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Sentiment Chart** element, you can change the look and feel of the sentiment chart in your report.

The **Appearance** section includes the following properties:

- **Chart Type** – The selected chart type of the report element. You can select the sentiment chart type for your report element from the list.
  The following options are available:
  - Area
  - Line
  - Scatter
  - Spline
  - Spline Area
  - Bar
  - Stacked Bar
  - Stacked Bar Percentage
  - Column
  - Stacked Column
  - Stacked Column Percentage
  - Gap
- **Background Color** – The background color of your sentiment chart.You can select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually or click the  icon to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – The gradient color for the uppermost area of your sentiment chart. You can select the color from a palette.
- **Border Color** – The border color of your sentiment chart. You can select the color from a palette.
- **Border Width** – You can adjust the width of borders in your sentiment chart. Values you enter in the text box are measured in pixels.
- **Border Radius** – You can increase or decrease the roundness of border corners in your sentiment chart.
- **Plot Area Color** – The plot area color of your sentiment chart. You can select the color from a palette.

- **Plot Area Gradient End Color** – The gradient color for the uppermost area of your sentiment chart plot area. You can select the color from a palette. This value is limited to the plot area and does not affect the background gradient of the chart.
- **Show Legend** – The legend (Positive, Neutral, and Negative) appears below the sentiment chart. By default, the check box is selected
- **Label Rotation Angle** – You can define the label rotation angle in degrees.
- **Maximum Characters** – You can define the maximum number of characters for your sentiment chart.
- **Size Charts Automatically** – You can make the sentiment charts fit the current window size automatically.
- **Width** – You can define the width of your sentiment chart. Values you enter in the text box are measured in pixels.
- **Height** – You can define the height of your sentiment chart. Values you enter in the text box are measured in pixels.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Sentiment Chart** elements in your report, click **Apply All**.

Sentiment Chart – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Data** section in the left pane.

In the **Data** section of a **Sentiment Chart** element, you can select the language used for the analysis, control the sort order, decimal places, and content displayed in the sentiment chart.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your sentiment chart.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Sentiment Chart Content** – You can select the content that you want to be displayed in the sentiment chart.
  The Text Analytics application structures responses by identifying the following items:
  - Top Level Categories
  - Category Leaves
  - Relationships
  - Terms
- **Sort Order** – You can select the order of the top level categories (category leaves, relationships, or terms) in the sentiment chart. The **Count** option is a default value. When you change the order, the sentiment chart is updated to show data in the newly selected order. In the **View Responses** dialog box, the order is updated too.
  The following options are available:
  - Alphabetical Order
  - Count
  - Most Negative
  - Most Neutral
  - Most Positive
- **Invert Sort Order** – You can select the check box to display the top level categories (category leaves, relationships, or terms) in reverse order in the sentiment chart.
- **Decimal Places** – You can define the decimal places for the values displayed in the sentiment chart.

To apply changes to all **Sentiment Chart** elements in your report, click **Apply All**.

Sentiment Chart – Displayed Values

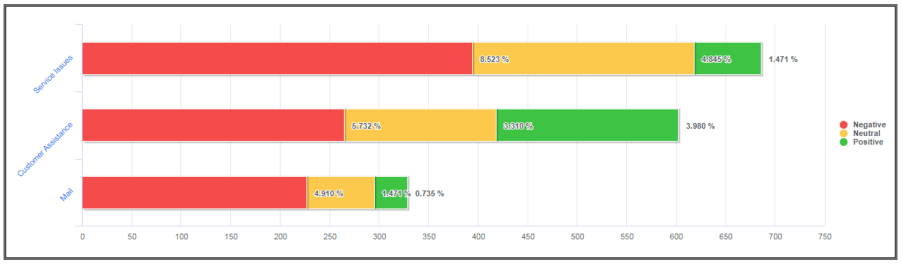
Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Displayed Values** section in the left pane.

In the **Displayed Values** section of a **Sentiment Chart** element, you can define the number of categories on each chart page, configure the chart export settings, and display the response count and percentage on the sentiment chart.

The **Displayed Values** section includes the following properties:

- **Items per Page** – You can control how many categories are shown on each page of the sentiment chart to ensure that the chart is readable. By default, the top 10 categories appear on the first page of the element.
- **Pages to Export** – You can control how many pages of the sentiment chart you want to export to PDF, Microsoft Word, or Microsoft PowerPoint. For example, if you set the value to 10, the first 10 pages of the sentiment chart are exported. Each chart appears on a new page in the export document. The pages are numbered. By default, only the first page of the sentiment chart is exported.
- **Count** – You can control the number of responses for each category (word or relationship) sentiment.
- **Sentiment Percentage** – You can control the percentage of responses for each category (word or relationship) sentiment.
- **Sentiment Percentage by Total** – You can control the percentage of responses for each category (word or relationship) sentiment calculated by total number of responses.



The Sentiment Chart with the count and percentages

To apply changes to all **Sentiment Chart** elements in your report, click **Apply All**.

Sentiment Chart – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Sentiment Chart** report element into external applications.

The sort order and number of categories per page in the embedded sentiment chart are the same as in the actual report element. However, paging is not supported. Only the first page of the sentiment chart is displayed if the chart is embedded. You can control the data you want to display by filtering or changing the sort order and number of categories per page.

You cannot drill down into the embedded sentiment chart to view the responses.

You can use the code snippet to place a **Sentiment Chart** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the sentiment chart by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Sentiment Chart** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the sentiment chart on your custom page.

Sentiment Chart – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element.

On a sentiment chart, you can click a sentiment or top level category and view the text that represents a portion of the chart. You can switch between the different sentiments and top level categories and view the full respondents' answers.

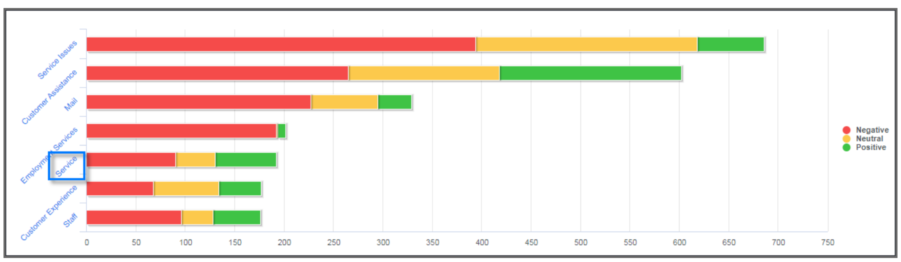
Filter responses by top level category

Procedure

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Sentiment Chart** report element.

You can add the **Sentiment Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the name of the top level category that you want to investigate further.



The top level category name

3 In the **View Responses** dialog box with all the sentences that represent that top level category regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

Content that cannot be categorized for the **Sentiment Chart** report element goes to the **Global Other** top level category. It does not depend on the **Sort Order** or **Invert Sort Order** option.

Filter responses by sentiment segment

Procedure

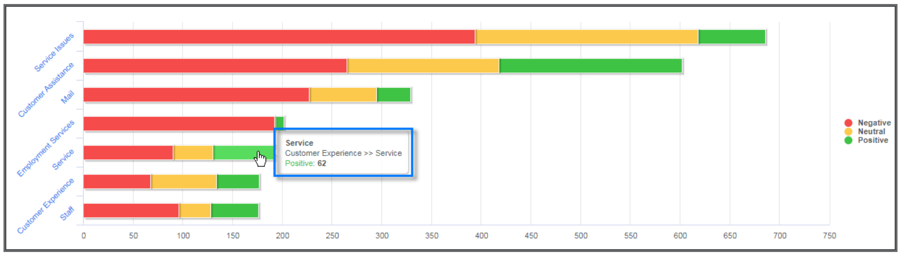
1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Sentiment Chart** report element.

> You can add the **Sentiment Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the sentiment segment next to the top level category that you want to investigate further.

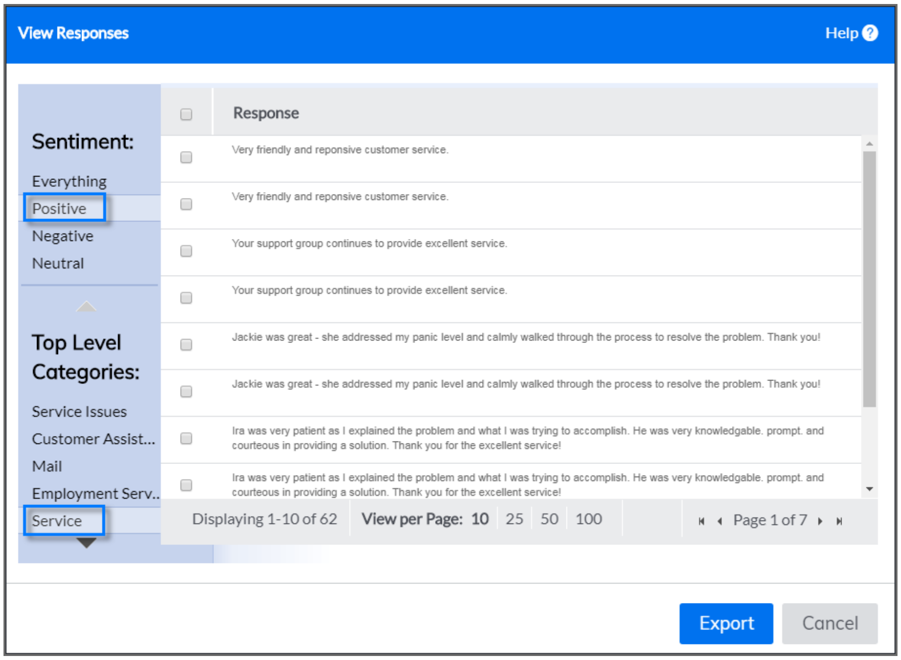
3 In the **View Responses** dialog box with all the sentences that contributed to that top level category and sentiment, navigate through the list of responses by clicking the scroll arrows

If you want to view all the positive feedback on the Service top level category, click the **Positive** segment next to **Service**.



The Positive segment next to Service top level category

In the **View Responses** dialog box, the selected sentiment and top level category are highlighted.



The positive responses for the Service category

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all the responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Category**, all the categories for the selected question are listed. The categories appear in the same order as on the chart. Thus, categories with the most number of responses appear at the top of the list. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

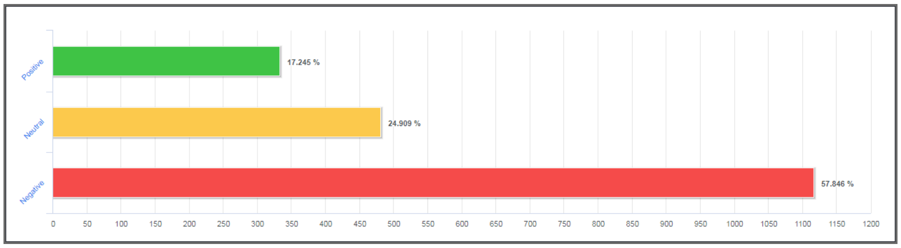
> You can select only one category and one sentiment at a time.

Sentiment Summary element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element.

With a **Sentiment Summary** report element, you can view how the overall sentiment for the question breaks down between the **Positive**, **Neutral**, and **Negative** ranges. The data is represented as a bar chart.



The Sentiment Summary report element

After adding the sentiment summary chart into your report, the element editor panel appears in the left pane with a number of collapsible menus:

Sentiment Summary – Report Element, page 903

Sentiment Summary – Appearance, page 905

Sentiment Summary – Data, page 907

Sentiment Summary – Displayed Values, page 908

Sentiment Summary – Embed Report Element, page 909

Add a Sentiment Summary report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element > add the **Sentiment Summary** report element.

You can use the **Sentiment Summary** report element to analyze responses to the open-ended questions and create comprehensive charts showing the overall sentiment breakdown.

Procedure

1 In the **Add a Report Element** left pane, in the **Text analytics** section, click the **Sentiment Summary** element.

> You can add the **Sentiment Summary** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the **Essay** and **Matrix with an Essay** side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Sentiment Summary** report element in the right pane and element editor - in the left, click **Add**.

> You can add a **Sentiment Summary** report element when your survey has the **Open** or **Closed** status only.

Sentiment Summary element, page 901

Sentiment Summary – Report Element

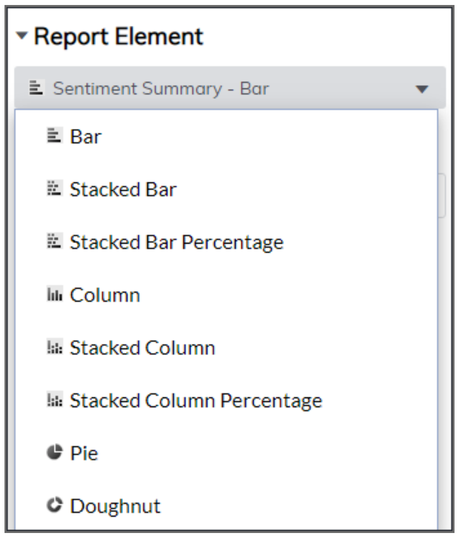
Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element > add the **Sentiment Summary** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Sentiment Summary** element, you can select the chart type and question for the element as well as show or hide the question text, description, and caption for the element.

The **Report Element** section includes the following properties:

- **Chart Type** – The selected report element and chart type. You can select the sentiment chart type from the list.



The Chart Type list

- **Question** – The source question. You can select the source question from the list. The sentiment summary is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.

- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** drop-down lists.
  To check the spelling, click **Spell Check**.

Sentiment Summary – Appearance

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element > add the **Sentiment Summary** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Sentiment Summary** element, you can change the look and feel of the sentiment summary chart in your report.

The **Appearance** section includes the following properties:

- **Chart Type** – The selected chart type of the report element. You can select the sentiment chart type for your report element from the list.
  The following options are available:
  - Bar
  - Stacked Bar
  - Stacked Bar Percentage
  - Column
  - Stacked Column
  - Stacked Column Percentage
  - Pie
  - Doughnut
- **Background Color** – The background color for your sentiment summary chart. You can select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually or click the icon to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – The gradient color for the uppermost area of your sentiment summary chart. You can select the color from a palette.
- **Border Color** – The border color of your sentiment summary chart. You can select the color from a palette.
- **Border Width** – You can adjust the width of borders in your sentiment summary chart. Values you enter in the field are measured in pixels.
- **Border Radius** – You can increase or decrease the roundness of border corners in your sentiment summary chart.
- **Plot Area Color** – The plot area color for your sentiment summary chart. You can select the color from a palette.
- **Plot Area Gradient End Color** – The gradient color for the uppermost area of your sentiment summary chart plot area. You can select the color from a palette. This value is limited to the plot area and does not affect the background gradient of the summary chart.
- **Show Legend** – The legend (Positive, Neutral, and Negative) appears below the summary chart and is available for the **Pie** and **Doughnut** chart types only. By default, the check box is selected.
- **Label Rotation Angle** – You can define the label rotation angle in degrees.

- **Maximum Characters** – You can define the maximum number of characters for your sentiment summary chart.
- **Size Charts Automatically** – You can make the sentiment summary charts fit the current window size automatically.
- **Width** – You can define the width of your sentiment summary chart. Values you enter in the text box are measured in pixels.
- **Height** – You can define the height of your sentiment summary chart. Values you enter in the text box are measured in pixels.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Sentiment Summary** elements in your report, click **Apply All**.

Sentiment Summary – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element > add the **Sentiment Summary** report element > **Data** section in the left pane.

In the **Data** section of a **Sentiment Summary** element, you can select the language used for the analysis, control the sort order, decimal places, and scale values displayed in the sentiment summary chart.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your sentiment summary chart.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Sort Order** – You can select the order of the sentiment bars in the chart. The **Positive to Negative** option is a default value. When you change the order, the sentiment summary chart is updated to show data in the newly selected order.
  The following options are available:
  - Positive to Negative
  - Negative to Positive
- **Calculate as Percentage** – You can select the check box to show a percentage on the chart scale rather than a count. The check box is selected by default.
- **Decimal Places** – You can define the decimal places for the values displayed in the sentiment summary chart.

To apply changes to all **Sentiment Summary** elements in your report, click **Apply All**.

Sentiment Summary – Displayed Values

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Summary** report element > add the **Sentiment Summary** report element > **Displayed Values** section in the left pane.

In the **Displayed Values** section of a **Sentiment Summary** element, you can display the response count and percentage on the sentiment summary chart.

The **Displayed Values** section includes the following properties:

- **Count** – You can control the number of responses for each sentiment.
- **Sentiment Percentage** – You can control the percentage of responses for each sentiment.

To apply changes to all **Sentiment Summary** elements in your report, click **Apply All**.

Sentiment Summary – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Chart** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Sentiment Summary** report element into external applications.

> You cannot drill down into the embedded word cloud to view the responses.

You can use the code snippet to place a **Sentiment Summary** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the sentiment summary chart by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Sentiment Summary** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the sentiment summary chart on your custom page.

Sentiment Summary – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new report > **Report** designer page > **Add** menu.

With a **Sentiment Summary** report element, you can view how the overall sentiment for the question breaks down between the **Positive**, **Neutral**, and **Negative** ranges. The data is represented as a bar chart.

On a sentiment summary chart, you can click a sentiment bar and view the text that represents a portion of the chart. You can switch between the different sentiments and categories and view the full respondents' answers.

Filter responses in the sentiment summary chart

Procedure

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Sentiment Summary** report element.

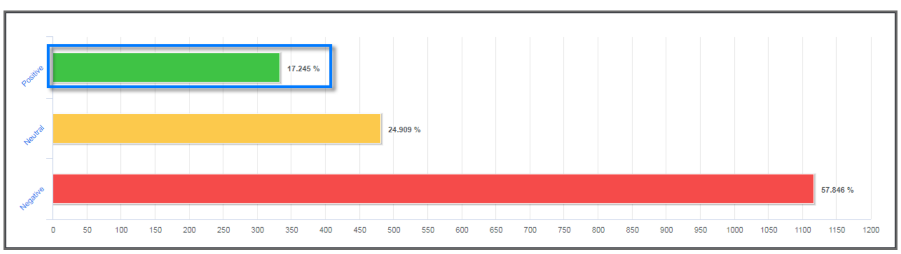
> You can add the **Sentiment Summary** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the sentiment that you want to investigate further.

3 In the **View Responses** dialog box with all the sentences that represent that sentiment including all the categories, navigate through the list of responses by clicking the scroll arrows.

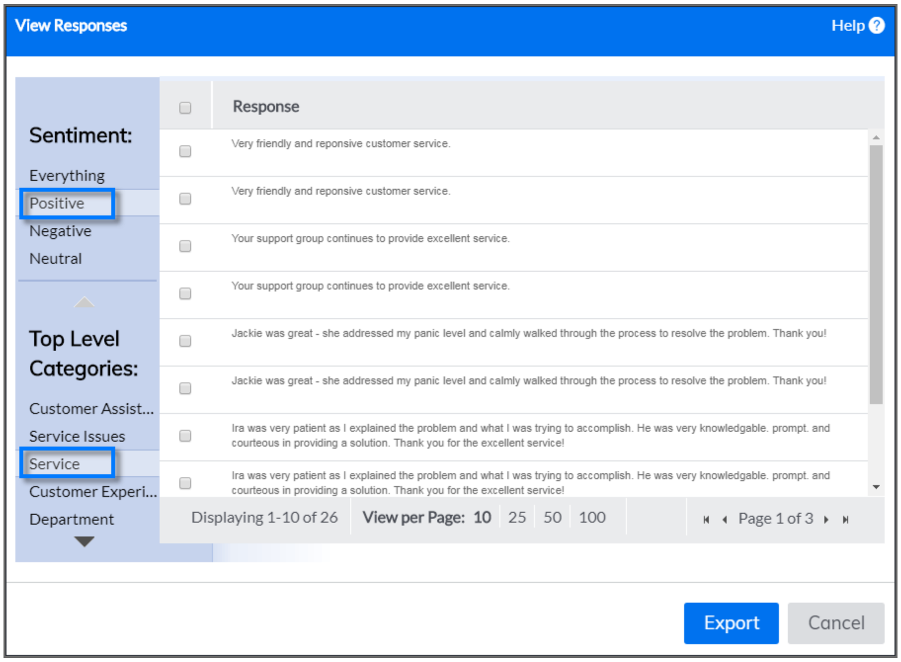
> You can switch between the different sentiments and categories in the dialog box.

If you want to view all the positive feedback on the **Positive** category, click the **Positive** sentiment bar in the **Sentiment Summary** element.



The Positive sentiment bar in the Sentiment Summary element

In the **View Responses** dialog box, the selected sentiment is highlighted.



The Positive responses for the Service category

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all the responses for the selected category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment bar.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Category**, all the categories for the selected question are listed. You can scroll between the categories by clicking the up and down arrows. When you select a different category, the response list on the right is updated to show the responses that represent that category.

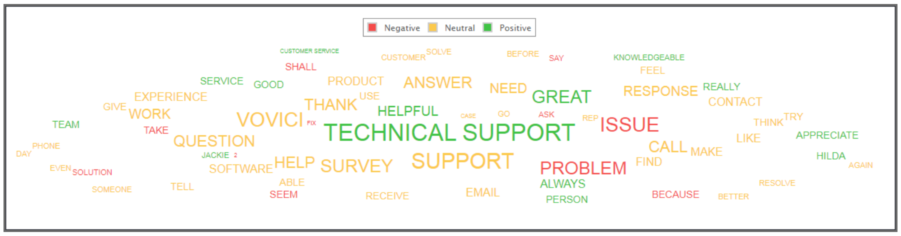
> You can select only one category and one sentiment at a time.

Word Cloud element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element.

You can use a **Word Cloud** report element to view the volume and sentiment for the words that are used in the unstructured text. The data appears in the form of a word cloud. Word cloud is a set of words represented as a cloud that appears in different size and color. The cloud gives greater prominence to words that occur more frequently in the source text. The color indicates the **Positive**, **Neutral**, and **Negative** sentiments.



The Word Cloud report element

You can drill down into the word cloud to view the responses.

After adding the word cloud into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Word Cloud Report Element, page 914
- Word Cloud – Appearance, page 915
- Word Cloud – Data, page 916
- Word Cloud – Embed Report Element, page 917
- Word Cloud – Filtering, page 918

Add a Word Cloud report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element.

Using the **Word Cloud** report element, you can view data for the terms, top level categories, category leaves, and relationships created within the responses to the question.

Procedure

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Word Cloud** element.

> You can add the **Word Cloud** report element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Word cloud** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Word Cloud** report element when your survey has the **Open** or **Closed** status only.

Word Cloud Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Word Cloud** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** section includes the following properties: :

- **Type** – The selected report element type.
- **Question** – The source question. You can select the source question from list. The word cloud is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** lists.
  To check the spelling, click **Spell Check**.

Word Cloud – Appearance

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Word Cloud** element, you can change the look and feel of the word cloud in your report.

The **Appearance** section includes the following properties:

- **Cloud Shape** – The selected cloud form of the report element. You can select the cloud shape of your report element from the list. The following options are available:
  - Elliptic
  - Rectangular
- **Background Color** – The background color for your word cloud.
  You can select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually or click the icon to adjust red, green, blue, hue, saturation, and black level values.
- **Border Color** – The border color of your word cloud. You can select the color from a palette.
- **Border Width** – You can adjust the width of borders in your word cloud. Values you enter in the text boxare measured in pixels.
- **Show Legend** – The legend (Positive, Neutral, and Negative) appears above the word cloud. By default, the check box is selected.
- **Size Cloud Automatically** – You can make the word cloud fit the current window size automatically.
- **Width** – You can define the width of your word cloud. Values you enter in the text box are measured in pixels.
- **Height** – You can define the height of your word cloud. Values you enter in the text box are measured in pixels.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Word Cloud** elements in your report, click **Apply All**.

Word Cloud – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element > **Data** section in the left pane.

In the **Data** section of a **Word Cloud** element, you can select the language used for the analysis and control the content displayed in the word cloud.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your word cloud.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Cloud Content** – You can select the type of content that you want to be displayed in the word cloud. The Text Analytics application structures responses by identifying the following items:
  - Terms (default option)
  - Relationships
  - Top Level Categories
  - Category Leaves
- **Maximum Items** – You can enter the number of terms to be displayed in the word cloud. By default, 100 items are displayed.

To apply changes to all **Word Cloud** elements in your report, click **Apply All**.

Word Cloud – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Word Cloud** report element into external applications.

You cannot drill down into the embedded word cloud to view the responses.

You can use the code snippet to place a **Word Cloud** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the word cloud by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Word Cloud** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the word cloud on your custom page.

Word Cloud – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Word Cloud** report element.

You can interact with the **Word Cloud** report element by clicking a term and exploring further the actual sentences that contributed to that selected term. The data can be filtered by terms and sentiments. You can switch between the different sentiments and terms and view the full respondents' answers.

Filter responses in the Word Cloud

Procedure

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Word Cloud** report element.

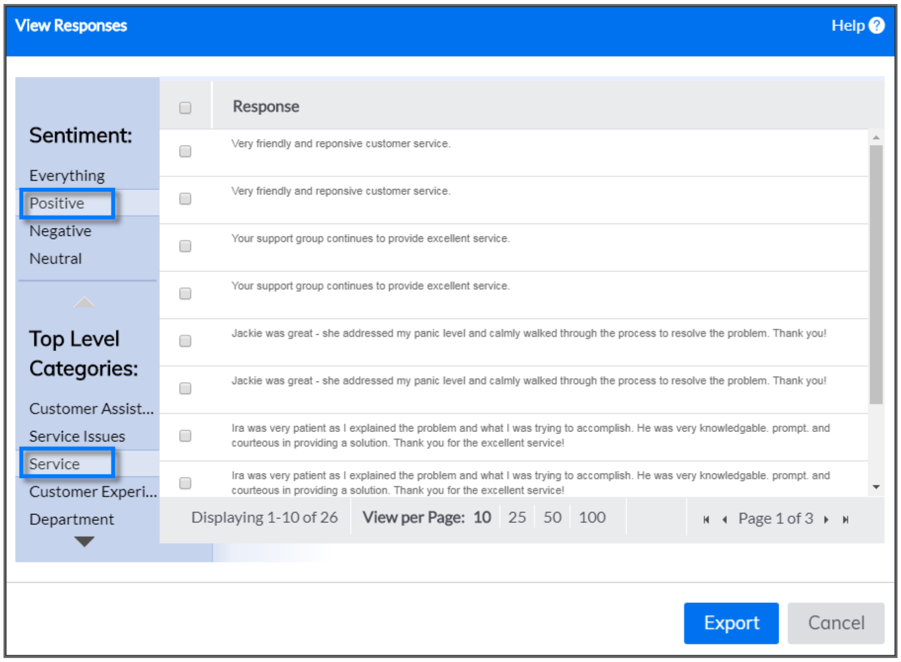
> You can add the **Word Cloud** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the term that you want to investigate further.

3 In the **View Responses** dialog box with all the sentences that represent that term regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

> You can switch between the different sentiments and terms in the dialog box.

If you want to view responses containing the **Service** term, click it within the word cloud. In the **View Responses** dialog box, the selected term is highlighted.



The responses for the Service term

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all the responses for the selected term, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on the page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Terms**, all the terms for the selected question are listed. The terms appear in the same order as used for sizing the word cloud. Thus, terms with the most number of responses appear at the top of the list. You can scroll between the terms by clicking the up and down arrows. When you select a different term, the response list on the right is updated to show the responses that represent that term.

> You can select only one term and one sentiment at a time.

Heat Map element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element.

With the **Heat Map** report element, you can view a graphical representation of data that appears in different size and color. The size indicates volume of words that occur more frequently in the source text. The color indicates the **Positive**, **Neutral**, and **Negative** sentiments.

The Heat Map report element

You can drill down into the heat map to view responses.

After adding the heat map into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Heat Map – Report Element, page 923
- Heat Map – Appearance, page 924
- Heat Map – Data, page 925
- Heat Map – Displayed Values, page 926
- Heat Map – Embed Report Element, page 927

Add a Heat Map report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element.

Using the **Heat Map** report element, you can view data for the top level categories and category leaves created within the responses to the question.

Procedure

1 In the **Adda Report Element** left pane, in the **Text Analytics** section, click the **Heat Map** element.

> You can add the **Heat Map** report element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **DataSource** option at the top of the dialog box.

3 To get the **Heat Map** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Heat Map** report element when your survey has the **Open** or **Closed** status only.

Heat Map – Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Heat Map** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** section includes the following properties:

- **Type** – The selected report element type.
- **Question** – The source question. You can select the source question from the list. The heat map is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text,description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** drop-down lists. To check the spelling, click **Spell Check**.

Heat Map – Appearance

Navigation

Projects tab > **Surveys** side tab > open an existing survey > **Analyze** tab > **Reports** side tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Heat Map** element, you can change the look and feel of the heat map in your report.

The **Appearance** section includes the following properties:

- **Border Color** – The border color of your heat map. You can select the color from a palette.
- **Border Width** – You can adjust the width of borders for your heat map. Values you enter in the text box are measured in pixels.
- **Size Charts Automatically** – You can make the heat maps fit the current window size automatically.
- **Width** – You can define the width of your heat map. Values you enter in the text box are measured in pixels.
- **Height** – You can define the height of your heat map. Values you enter in the text box are measured in pixels.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Heat Maps** elements in your report, click **Apply All**.

Heat Map – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element > **Data** section in the left pane.

In the **Data** section of a **Heat Map** element, you can select the language used for the analysis, control the sort order and content displayed in the heat map.

The **Data** section includes the following options:

- **Language used for Analysis** – You can select the language for your heat map.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Heat Map Content** – You can select the content that you want to be displayed in the heat map. The Text Analytics application structures responses by identifying the following items:
  - Top Level Categories (default option)
  - Category Leaves
- **Sort Order** – You can select the order of the top level categories (category leaves) in the heat map. The **Count** option is a default value. When you change the order, the heat map is updated to show data in the newly selected order. In the **View Responses** dialog box, the order is updated too.
  The following options are available:
  - **Count** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
  - **% of Total Count** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
  - **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

To apply changes to all **Heat Maps** elements in your report, click **Apply All**.

Heat Map – Displayed Values

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element > **Displayed Values** section in the left pane.

In the **Displayed Values** section of a **Heat Map** element, you can display the response count and percentage on the heat map.

The **Displayed Values** section includes the following properties:

- **Count** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
- **% of Total Count** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

To apply changes to all **Heat Maps** elements in your report, click **Apply All**.

Heat Map – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Heat Map** report element into external applications.

You cannot drill down into the embedded heat map to view responses.

You can use the code snippet to place a **Heat Map** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the heat map by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Heat Map** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the heat map on your custom page.

Heat Map – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Heat Map** report element.

On a **Heat Map** report element, you can click a top level category name and view the text that represents a portion of the heat map. You can switch between the different sentiments and top level categories and view the full respondents' answers.

Filter responses in the Heat Map

Procedure

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Heat Map** report element.

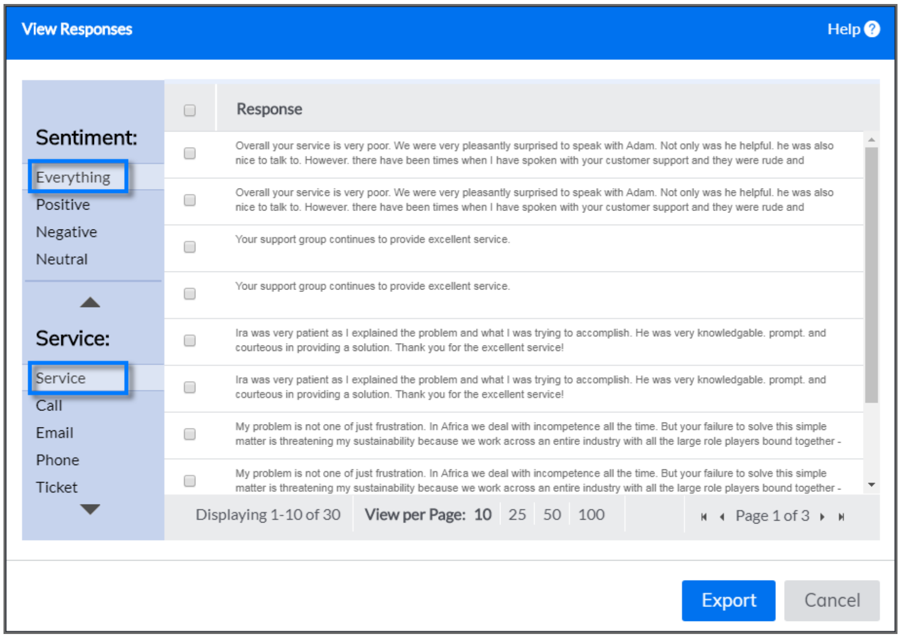
> You can add the **Heat Map** report element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the category leaf that you want to investigate further.

3 In the **View Responses** dialog box with all the sentences that represent that category leaf regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

> You can switch between the different sentiments and category leaves in the dialog box.

If you want to view responses containing the **Support Email** category leaf, click the selected category on the heat map.
In the **View Responses** dialog box, the selected category leaf is highlighted.



The Service category leaf on the Heat Map

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all the responses for the selected category leaf, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Category**, all category leaves for the selected question are listed. You can scroll between the category leaves by clicking the up and down arrows. When you select a different category leaf, the response list on the right is updated to show the responses that represent that category leaf.

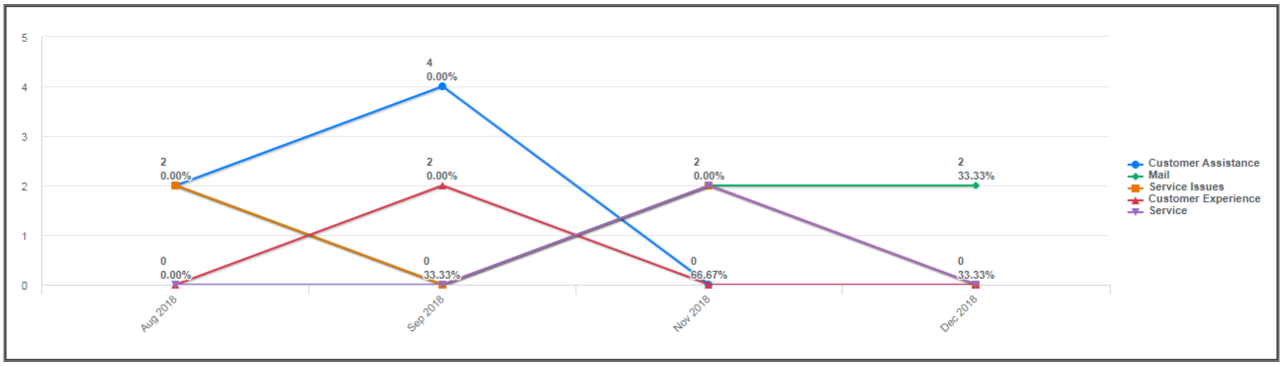
You can select only one category leaf and one sentiment at a time.

Trend Chart element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element.

With the **Trend Chart** report element, you can track the top ten items as trend lines. You can view data for the top level categories, category leaves, terms, or relationships created within the responses to the question.



The Trend Chart report element

> You can drill down into the trend chart to view responses.

After adding the trend chart into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Trend Chart – Report Element, page 933
- Trend Chart – Appearance, page 934
- Trend Chart – Data, page 935
- Trend Chart – Displayed Values, page 937
- Trend Chart – Embed Report Element, page 938

> The **Trend Chart** report element added to the dashboard does not support the dashboard date filter.

Add a Trend Chart report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element.

You can visualize your survey verbatim datasets in a trend chart for better understanding of the verbatim responses.

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Trend Chart** element.

> You can add the **Trend Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Trend Chart** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Trend Chart** report element when your survey has the **Open** or **Closed** status only.

Trend Chart – Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Trend Chart** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** section includes the following properties:.

- **Type** – The selected report element type.
- **Question** – The source question. You can select the source question from the list. The trend chart is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** lists. To check the spelling, click **Spell Check**.

Trend Chart – Appearance

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Trend Chart** element, you can change the look and feel of the trend chart in your report.

The **Appearance** section includes the following properties:

- **Background Color** – The background color for your trend chart. You can select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

  If you know the hexadecimal value of a color, you can enter it manually or click the icon to adjust red, green, blue, hue, saturation, and black level values.
- **Gradient End Color** – The gradient color for the uppermost area of your trend chart. You can select the color from a palette.
- **Border Color** – The border color of your trend chart. You can select the color from a palette.
- **Border Width** – You can adjust the width of borders in your trend chart. Values you enter in the text box are measured in pixels.
- **Border Radius** – You can increase or decrease the roundness of border corners in your trend chart.
- **Plot Area Color** – The plot area color for your trend chart. You can select the color from a palette.
- **Plot Area Gradient End Color** – The gradient color for the uppermost area of your trend chart plot area. You can select the color from a palette. This value is limited to the plot area and does not affect the background gradient of the chart.
- **Show Legend** – The legend appears to the right of the chart. By default, the check box is selected.
- **Label Rotation Angle** – You can define the label rotation angle in degrees.
- **Maximum Characters** – You can define the maximum number of characters for your trend chart.
- **Size Charts Automatically** – You can make the trend charts fit the current window size automatically.
- **Width** – You can define the width of your trend chart. Values you enter in the text box are measured in pixels.
- **Height** – You can define the height of your trend chart. Values you enter in the text box are measured in pixels.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Trend Chart** elements in your report, click **Apply All**.

Trend Chart – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element > **Data** section in the left pane.

In the **Data** section of a **Trend Chart** element, you can select the language used for the analysis, control the sort order and content displayed in the trend chart.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your trend chart.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Trend Chart Content** – You can select the content that you want to be displayed in the trend chart. The Text Analytics application structures responses by identifying the following items:
    - Top Level Categories (default option)
    - Category Leaves
    - Relationships
    - Terms
- **Sort Order** – You can select the order of the top level categories (category leaves, relationships, or terms) in the trend chart. The **Count** option is a default value. When you change the order, the trend chart is updated to show data in the newly selected order. In the **View Responses** dialog box, the order is updated too. The following options are available:
    - **Count** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
    - **% of Total Count** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
    - **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

- **Invert Sort Order** – You can select the check box to display the top level categories (category leaves, relationships, or terms) in reverse order in the trend chart.
- **Decimal Places** – You can define the decimal places for the values displayed in the trend chart.

To apply changes to all **Trend Chart** elements in your report, click **Apply All**.

Trend Chart – Displayed Values

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element > **Displayed Values** section in the left pane.

In the **Displayed Values** section of a **Trend Chart** element, you can display the response count and percentage on the trend chart.

The **Displayed Values** section includes the following properties:

- **Volume** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
- **% of Total Volume** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

To apply changes to all **Trend Chart** elements in your report, click **Apply All**.

Trend Chart – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Trend Chart** report element into external applications.

You cannot drill down into the embedded trend chart to view responses.

You can use the code snippet to place a **Trend Chart** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the trend chart by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Trend Chart** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the trend chart on your custom page.

Trend Chart – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Trend Chart** report element.

On a trend chart, you can click a top level category and view the text that represents a portion of the chart. You can switch between the different sentiments and top level categories and view the full respondents' answers.

Filter responses in the Trend Chart

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Trend Chart** report element.

> You can add the **Trend Chart** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

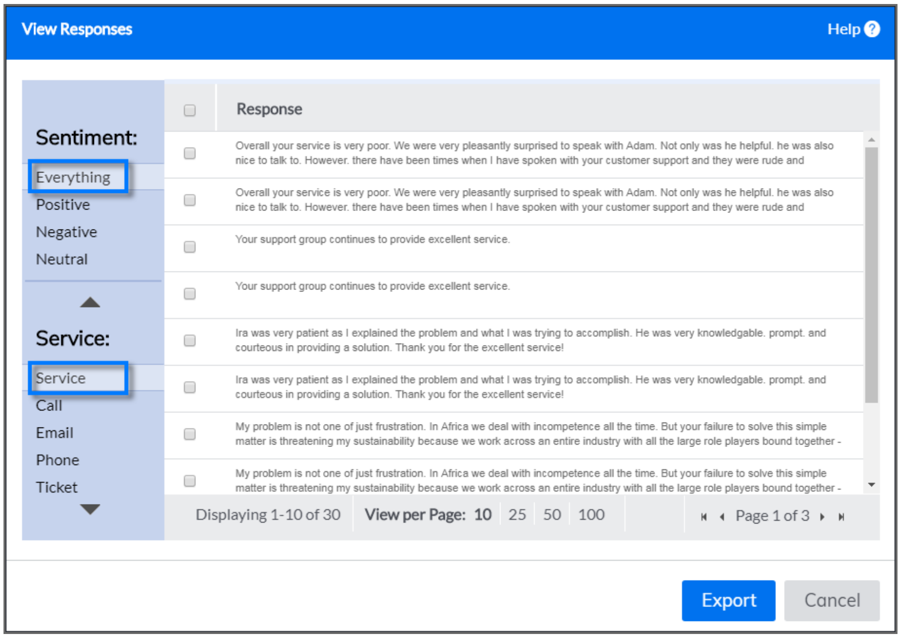
2 Click the trend line of the top level category that you want to investigate further.

3 In the **View Responses** dialog box with all the sentences that represent that category regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

If you want to view responses containing the **Service** top level category, click its trend line on the chart.

The Service top level category on the chart

In the **View Responses** dialog box, the selected category is highlighted.



The responses for the Service top level category

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all the responses for the selected top level category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all top level categories for the selected question are listed. You can scroll between the top level categories by clicking the up and down arrows. When you select a different top level category, the response list on the right is updated to show the responses that represent that top level category.

> You can select only one category and one sentiment at a time.

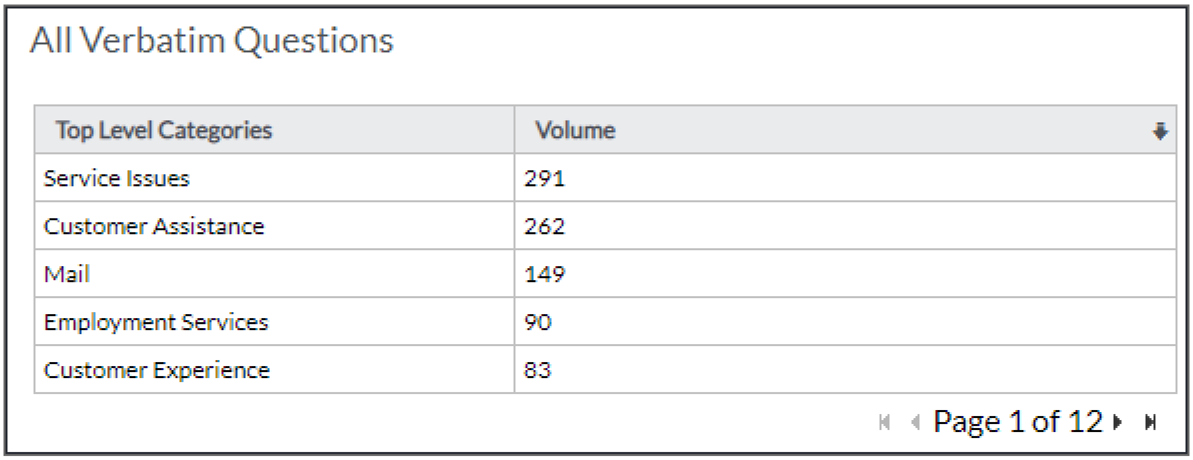
Sentiment Table element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element.

You can visualize your survey verbatim datasets in a table for better understanding of the verbatim responses.

With the **Sentiment Table** report element, you can view your Text Analysis results in a table. The color indicates the **Positive**, **Neutral**, and **Negative** sentiments.


All Verbatim Questions

Top Level Categories	Volume
Service Issues	291
Customer Assistance	262
Mail	149
Employment Services	90
Customer Experience	83

Page 1 of 12

The Sentiment Table report element

You can drill down into the sentiment table to view responses.

To navigate through the pages of the sentiment table, click the navigation arrows at the bottom of the element.

After adding the sentiment table into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Sentiment Table – Report Element, page 944
- Sentiment Table – Appearance, page 945
- Sentiment Table – Data, page 946
- Sentiment Table – Displayed Values, page 948
- Sentiment Table – Embed Report Element, page 949

Add a Sentiment Table report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element.

Using the **Sentiment Table** report element, you can view data for the terms, top level categories, category leaves, and relationships created within the responses to the question.

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Sentiment Table** element.

> You can add the **Sentiment Table** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Sentiment Table** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Sentiment Table** report element when your survey has the **Open** or **Closed** status only.

Sentiment Table – Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Sentiment Table** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** section includes the following properties:

- **Type** – The selected report element type.
- **Question** – The source question. You can select the source question from the list. The sentiment table is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color**drop-down lists. To check the spelling, click **Spell Check**.

Sentiment Table – Appearance

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element > **Appearance** section.

In the **Appearance** section of a **Sentiment Table** element, you can change the look and feel of the sentiment table in your report.

The **Appearance** section is divided into **Row** and **Header** subsections including the following properties:

- **Color** – The background color for the data or header rows. You can select the color from a palette.
- **Text Color** – The text color for data or header rows. You can select the color from a palette. It is recommended to select contrasting colors in text color settings.
- **Font Name** – You can select web-compatible fonts for data and header text from a list.
- **Font Size** – You can select web-compatible font sizes for data and header text from a list.
- **Top Level Categories (Category Leaves, Terms, or Relationships)** – You can type your text to rename the column header of the content type.
- **Volume** – You can type your text to rename the column header of the **Volume** displayed value.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Sentiment Table** elements in your report, click **Apply All**.

Sentiment Table – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element > **Data** section in the left pane.

In the **Data** section of a **Sentiment Table** element, you can select the language used for the analysis, control the sort order and content displayed in the sentiment table.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your sentiment table.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Sentiment Table Content** – You can select the content that you want to be displayed in the sentiment table. The Text Analytics application structures responses by identifying the following items:
  - Top Level Categories (default option)
  - Category Leaves
  - Relationships
  - Terms
- **Sort Order** – You can select the order of the top level categories (category leaves, relationships, or terms) in the sentiment table. The **Count** option is a default value. When you change the order, the sentiment table is updated to show data in the newly selected order. In the **View Responses** dialog box, the order is updated too.
  The following options are available:
  - **Alphabetical Order** – The item displays the data based on the alphabet.
  - **Count** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
  - **% of Total Count** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
  - **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

- **Invert Sort Order** – You can select the check box to display the top level categories (category leaves, relationships, or terms) in reverse order in the sentiment table.
- **Decimal Places** – You can set the number of decimal places for the values in the sentiment table. The default value is set to **3** or the highest value supported by Text Analytics if it is less than 3. This option is not applicable to the **Volume** displayed value.

To apply changes to all **Sentiment Table** elements in your report, click **Apply All**.

Sentiment Table – Displayed Values

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element > **Displayed values** section in the left pane.

In the **Displayed Values** section of a **Sentiment Table** element, you can control the **Rows per Page** value and display the response count and percentage on the sentiment table.

The **Displayed Values** section includes the following properties:

- **Rows per Page** – The number of rows displayed per page of the sentiment table.
- **Volume** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
- **% of Total Volume** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.

To apply changes to all **Sentiment Table** elements in your report, click **Apply All**.

Sentiment Table – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Sentiment Table** report element into external applications.

You cannot drill down into the embedded sentiment table to view responses.

You can use the code snippet to place a **Sentiment Table** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the sentiment table by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Sentiment Table** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the sentiment table on your custom page.

Sentiment Table – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Table** report element.

On a sentiment table, you can click a top level category and view the text that represents a portion of the table. You can switch between the different sentiments and top level categories and view the full respondents' answers.

Filter responses in the Sentiment Table

Procedure

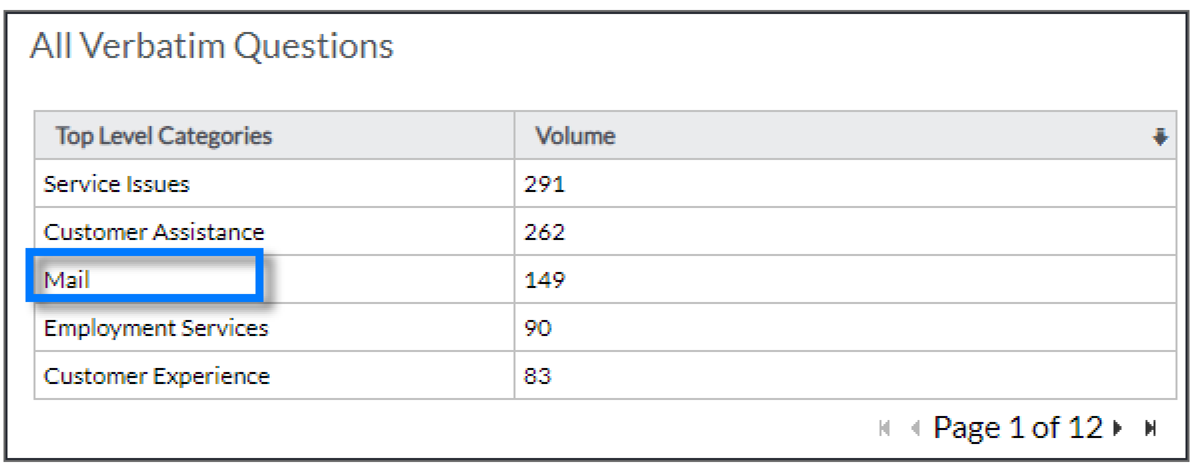
1. In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Sentiment Table** report element.

> You can add the **Sentiment Table** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2. Click the top level category that you want to investigate further.
3. In the **View Responses** dialog box with all sentences that represent that category regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

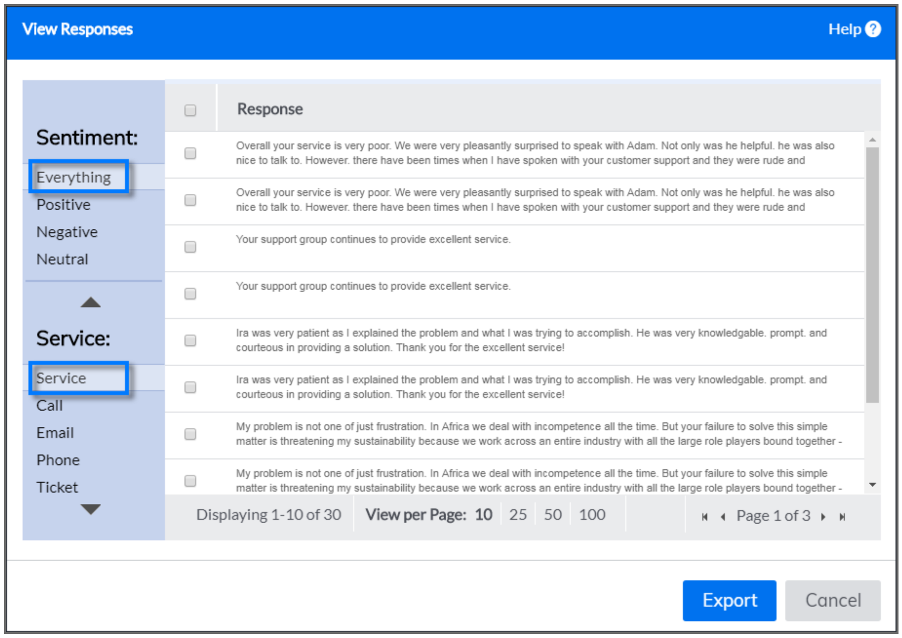
> You can switch between the different sentiments and categories in the dialog box.

If you want to view responses containing the **Mail** top level category, click its name on the table.



The Mail top level category on the table

In the **View Responses** dialog box, the selected category is highlighted.



The responses for the Service top level category

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected top level category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appears on one page. The default number of responses per page is **10**. You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

Under **Top Level Categories**, all top level categories for the selected question are listed. You can scroll between the top level categories by clicking the up and down arrows. When you select a different top level category, the response list on the right is updated to show the responses that represent that top level category.

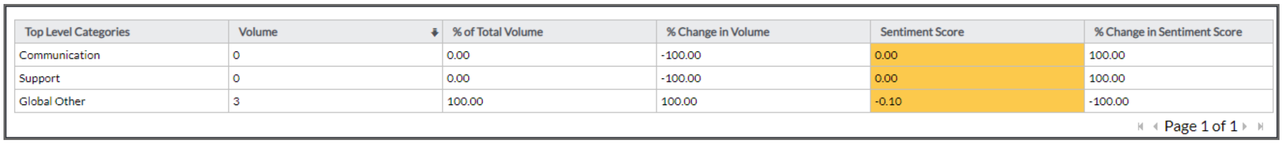
You can select only one category and one sentiment at a time.

Sentiment Trend Table element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element.

With the **Sentiment Trend Table** report element, you can view your text analysis results over the selected date range in a table. The color indicates the **Positive**, **Neutral**, and **Negative** sentiments.



Top Level Categories	Volume	% of Total Volume	% Change in Volume	Sentiment Score	% Change in Sentiment Score
Communication	0	0.00	-100.00	0.00	100.00
Support	0	0.00	-100.00	0.00	100.00
Global Other	3	100.00	100.00	-0.10	-100.00

Page 1 of 1

The Sentiment Trend Table report element

You can drill down into the sentiment trend table to view responses.

To navigate through the pages of the sentiment table, click the navigation arrows at the bottom of the element.

The **Sentiment Trend Table** report element added to the dashboard does not support the dashboard date filter.

After adding the sentiment trend table into your report, the element editor panel appears in the left pane with a number of collapsible menus:

- Sentiment Trend Table – Report Element, page 954
- Sentiment Table – Appearance, page 945
- Sentiment Trend Table – Data, page 956
- Sentiment Trend Table – Displayed Values, page 958
- Sentiment Trend Table – Embed Report Element, page 959

Add a Sentiment Trend Table report element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element.

Using the **Sentiment Trend Table** report element, you can view data for the terms, top level categories, category leaves, and relationships created within the responses to the question.

Procedure

1 In the **Add a Report Element** left pane, in the **Text Analytics** section, click the **Sentiment Trend Table** element.

> You can add the **Sentiment Trend Table** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 In the **Select data for your report element** dialog box, select the source question from the list of the Essay and Matrix with an Essay side questions or click **All Verbatim Questions**.

> You can select another source for your report element by clicking the **Data Source** option at the top of the dialog box.

3 To get the **Sentiment Trend Table** report element in the right pane and element editor in the left, click **Add**.

> You can add a **Sentiment Trend Table** report element when your survey has the **Open** or **Closed** status only.

Sentiment Trend Table – Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element > **Report Element** section in the left pane.

In the **Report Element** section of a **Sentiment Trend Table** element, you can select a base question for the element and show or hide the question text, description, and caption.

The **Report Element** section includes the following properties:

- **Type** – The selected report element type.
- **Question** – The source question. You can select the source question from the list. The sentiment trend table is updated to show data from the newly selected question.
- **Labels** – Displaying or hiding the question heading, text, description, and source citation. You can customize the question or description text by typing your own question or description in the **Show Question Text** or **Show Question Description** text box.
- **Caption** – A brief description below your report element. You can enter the text and customize its font size and style in the edit box. You can select the color of caption foreground and background from the **Foreground Color** and **Background Color** lists.
  To check the spelling, click **Spell Check**.

Sentiment Trend Table – Appearance

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element > **Appearance** section in the left pane.

In the **Appearance** section of a **Sentiment Trend Table** element, you can change the look and feel of the sentiment trend table in your report.

The **Appearance** section is divided into **Row** and **Header** subsections including the following properties:

- **Color** – The background color for the data or header rows. You can select the color from a palette.
- **Text Color** – The text color for data or header rows. You can select the color from a palette. It is recommended to select contrasting colors in text color settings.
- **Font Name** – You can select web-compatible fonts for data and header text from a list.
- **Font Size** – You can select web-compatible font sizes for data and header text from a list.
- **Top Level Categories (Category Leaves, Terms, or Relationships)** – You can type your text to rename the column header of the content type.
- **Volume** – You can type your text to rename the column header of the **Volume** displayed value.

Several **Appearance** properties can be assigned throughout the report with the report theme.

To apply changes to all **Sentiment Trend Table** elements in your report, click **Apply All**.

Sentiment Trend Table – Data

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element > **Data** section in the left pane.

In the **Data** section of the **Sentiment Trend Table** element, you can select the language used for the analysis, control the sort order, trend over period, and content displayed in the sentiment trend table.

The **Data** section includes the following properties:

- **Language used for Analysis** – You can select the language for your sentiment trend table.

> List of available languages is based on languages supported by Text Analytics, translations present in the survey, and selected model used for the analysis.

- **Sentiment Trend Table Content** – You can select the content that you want to be displayed in the sentiment trend table.
  The **Text Analytics** application structures responses by identifying the following items:
  - Top Level Categories (default option)
  - Category Leaves
  - Relationships
  - Terms
- **Sort Order** – You can select the order of the top level categories (category leaves, relationships, or terms) in the sentiment trend table. The **Count** option is a default value. When you change the order, the sentiment trend table is updated to show data in the newly selected order. In the **View Responses** dialog box, the order is updated too.
  The following options are available:
  - **Alphabetical Order** – The item displays the data based on the alphabet.
  - **Count** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
  - **% of Total Count** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
  - **% Change in Volume** – The item displays the percent change in the total number of distinct verbatims returned from Text Analytics over the selected date range.
  - **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.
  - **% Change in Sentiment Score** – The item displays the percent change in the rolled-up sentiment score for each content type as returned from Text Analytics over the selected date range.
- **Trend Over** – You can define the period over which you want to track the data. The following options are available:
  - **Day over Day** – Shows the result on a daily basis.
  - **Week over Week** – Shows the results on a weekly basis.

    - **Month over Month** – Shows the results on a monthly basis.
    - **Quarter over Quarter** – Shows the results on a quarterly (three months) basis.
    - **Year over Year** – Shows the results on a yearly basis.
- **Invert Sort Order** – You can select the check box to display the top level categories (category leaves, relationships, or terms) in reverse order in the sentiment trend table.
- **Decimal Places** – You can set the number of decimal places for the values in the sentiment trend table. The default value is set to **3** or the highest value supported by Text Analytics if it is less than 3. This option is not applicable to the **Volume** displayed value.

To apply changes to all **Sentiment Trend Table** elements in your report, click **Apply All**.

Sentiment Trend Table – Displayed Values

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element > **Displayed Values** section in the left pane.

In the **Displayed Values** section of a **Sentiment Trend Table** element, you can control the **Rows per Page** value and display the response count and percentage on the sentiment trend table.

The **Displayed Values** section includes the following properties:

- **Rows per Page** – The number of rows displayed per page of the sentiment trend table.
- **Volume** – The item displays the data based on the total number of distinct verbatims returned from Text Analytics.
- **% of Total Volume** – The item displays the data based on the percent of total verbatim volume returned from Text Analytics.
- **% Change in Volume** – The item displays the percent change in the total number of distinct verbatims returned from Text Analytics over the selected date range.
- **Sentiment Score** – The item displays the rolled-up sentiment score for each content type as returned from Text Analytics.
- **% Change in Sentiment Score** – The item displays the percent change in the rolled-up sentiment score for each content type as returned from Text Analytics over the selected date range.

To apply changes to all **Sentiment Trend Table** elements in your report, click **Apply All**.

Sentiment Trend Table – Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element > **Embed Report Element** section in the left pane.

You can generate a code snippet and URL to embed a **Sentiment Trend Table** report element into external applications.

You cannot drill down into the embedded sentiment trend table to view responses.

You can use the code snippet to place a **Sentiment Trend Table** report element into a custom page. The HTML code of the report element is generated automatically for you. You can also configure the width and height of the sentiment trend table by editing the code snippet in an HTML or text editor.

You can use the URL to place a **Sentiment Trend Table** report element into an IFrame on a custom page. The URL of the report element is generated automatically for you. You can also configure the width and height of the sentiment trend table on your custom page.

Sentiment Trend Table – Filtering

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > **Text Analytics** section > add the **Sentiment Trend Table** report element.

On a sentiment trend table, you can click a top level category and view the text that represents a portion of the table. You can switch between the different sentiments and top level categories and view the full respondents' answers.

Filter responses in the Sentiment Trend Table

Procedure

1 In the **Add a Report Element** area in the left pane, in the **Text Analytics** section, click the **Sentiment Trend Table** report element.

> You can add the **Sentiment Trend Table** element to the report either from the **Add a Report Element** left pane or from the **Add** menu.

2 Click the top level category that you want to investigate further.

3 In the **View Responses** dialog box with all sentences that represent that category regardless of the sentiment, navigate through the list of responses by clicking the scroll arrows.

> You can switch between the different sentiments and categories in the dialog box.

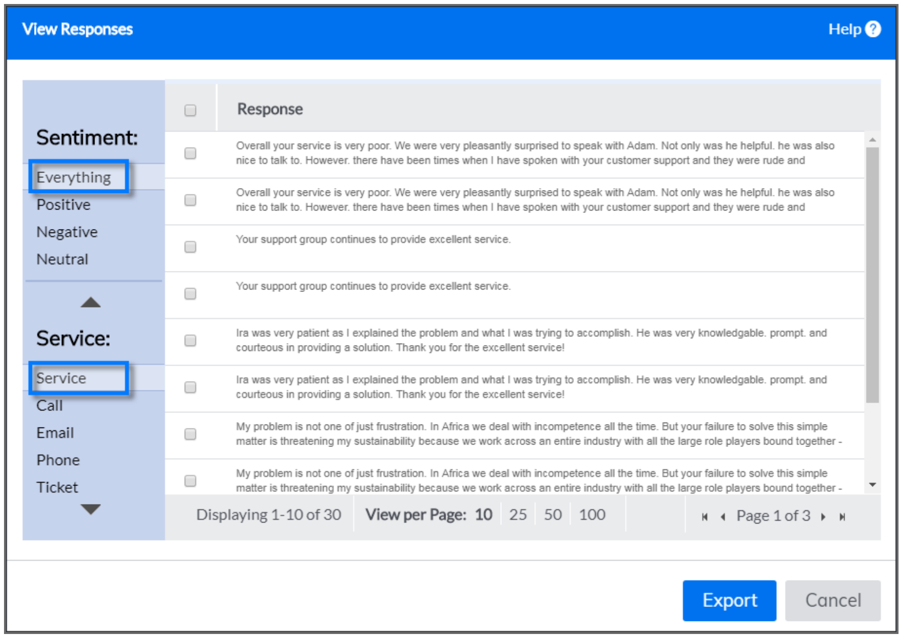
If you want to view responses containing the **Support** top level category, click its name on the table.

Top Level Categories	Volume	% of Total Volume	% Change in Volume	Sentiment Score	% Change in Sentiment Score
Support	12	48.00%	100.00%	0.06	100.00%
Vovici	6	24.00%	100.00%	-0.07	-100.00%
Global Other	12	48.00%	100.00%	0.03	100.00%

Page 1 of 1

The Support top level category on the table

In the **View Responses** dialog box, the selected category is highlighted.



The responses for the Service top level category

Under **Sentiment**, you can switch between the positive, negative, and neutral responses. The **Everything** option shows all responses for the selected top level category, including positive, negative, and neutral. When you select a different sentiment, the response list on the right is updated to show the responses that represent that sentiment segment.

The total number of responses for the selected sentiment is displayed at the bottom of the dialog box. You can adjust the number of responses that appear on one page. The default number of responses per page is **10.**You can also navigate through the pages of responses by clicking the scroll arrows at the bottom of the dialog box.

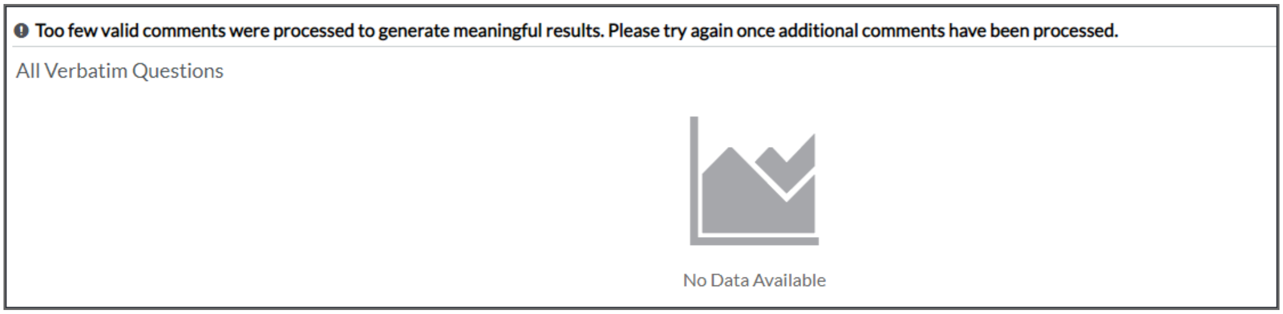
Under **Top Level Categories**, all top level categories for the selected question are listed. You can scroll between the top level categories by clicking the up and down arrows. When you select a different top level category, the response list on the right is updated to show the responses that represent that top level category.

You can select only one category and one sentiment at a time.

Text Analytics – Status messages

When you first add the Embedded Text Analytics elements to your report, the data may take up to 15 minutes to load. For all the further updates–up to an hour. Different messages appear for the report elements to notify you on the current status.

The status message appears above the report element that it refers to.



The status message

The following status messages may appear:

- Processing, please check back shortly.
- Additional responses have been received but are pending processing. Chart will be updated shortly.
- Too few valid comments were processed to generate meaningful results. Please try again once additional comments have been processed.
- Data is not currently available, please try again in a few minutes.
- The following data may be incomplete since text entries are still being processed.
- Filtering is not available yet, please check back later.

If you export the report, the status messages are exported too and appear as plain text in red in the export document.

If the number of records to be processed exceeds the batch size (100,000), you receive the following message: "Waiting for previous text analytics job to complete—system will retry in 1 hour."

On the **Administration** tab, on the **System Tasks** tab, you can view the status of your Text Analytics job.

Activate the drill-down to response list

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** page > create a report with a Text Analytics report element > select the check box next to the created report > click **Share** menu > click **Share with Other Users** option > **Select Other Users** dialog box > select **Allow drill-down to response list for text elements** check box.

Report authors can control whether a report viewer can drill down into the Embedded Text Analytics report elements to view the response list.

Procedure

1. On the **Reports** page, select the check box next to the report created with a Text Analytics report element.
2. On the toolbar, click **Share**>**Share with Other Users**.
3. In the **Select Other Users** dialog box, in the **Organization Unit or User** text box, select the name of the user with whom you want to share your report.
4. To allow the selected user to view your report, click the right double arrows button.
   The user's name is moved to the **View Access** text box.
5. To activate the drill-down for the selected user, select the **Allow drill-down to response list for text elements** check box.
6. Click **OK**.

By default, the **Allow drill-down to response list for text elements** check box is selected.

View the full response

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > add an element from the **Text Analytics** section > click the top level category (term) or sentiment > **View Responses** dialog box.

For the Text Analytics report elements, you can expand the response to view the full text.

Procedure

1. On the **Report** designer page, add a Text Analytics report element.
2. Click the top level category (term) or sentiment that you want to investigate further.
3. In the **View Responses** dialog box, click the response that you want to view for more details.
4. To get the full response, hover over it, and then click the **Show More Text** link.

View all respondent's answers

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > add an element from the **Text Analytics** section > click the top level category (term) or sentiment > **View Responses** dialog box.

For the Text Analytics report elements, you can view the full respondent record for the selected response.

You need the **View** access to responses to view the respondent's answers.

Procedure

1. On the **Report** designer page, add a Text Analytics report element.
2. Click the top level category (term) or sentiment that you want to investigate further.
3. In the **View Responses** dialog box, click the response that you want to view for more details.
4. To view all respondent's answers to the survey, hover over the selected response, and then click the **Go to Response** link.

Export the response list

Navigation

Design & Collect tab > **Surveys** tab > open an existing survey > **Analyze** tab > **Reports** tab > open an existing report or create a new one > **Report** designer page > **Add a Report Element** area in the left pane > add an element from the **Text Analytics** section > click the top level category (term) or sentiment > **View Responses** dialog box.

You can export the list of responses for the Text Analytics report elements. The data is exported to a text file (.txt). The exported file is represented as a list of sentence fragments, not the entire responses. Each response starts on a new line. The first line indicates the filter applied to the exported data. This includes the sentiment and top level categories (category leaves, terms, or relationships) filter plus the report filter, if any.

Procedure

1 On the **Report** designer page, add a Text Analytics report element.
2 Click the top level category or sentiment that you want to investigate further.
3 In the **View Responses** dialog box, select the check box next to the **Response** title.
4 To select all responses that represent the selected top level category or sentiment, click the **Select all "N" entries in this grid** link.

You can manually select the check boxes next to the individual responses you want to export.

5 To generate the export file, click **Export**.
6 In the **Export Responses** dialog box, to save or open the generated file, click the link that appears.
7 Click **Close**.

Change the sentiment colors

Navigation

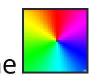
Library tab > **Report Themes** tab > select an existing theme or create a new one > **Report Theme** designer page > **Charts** tab > **Sentiment** section.

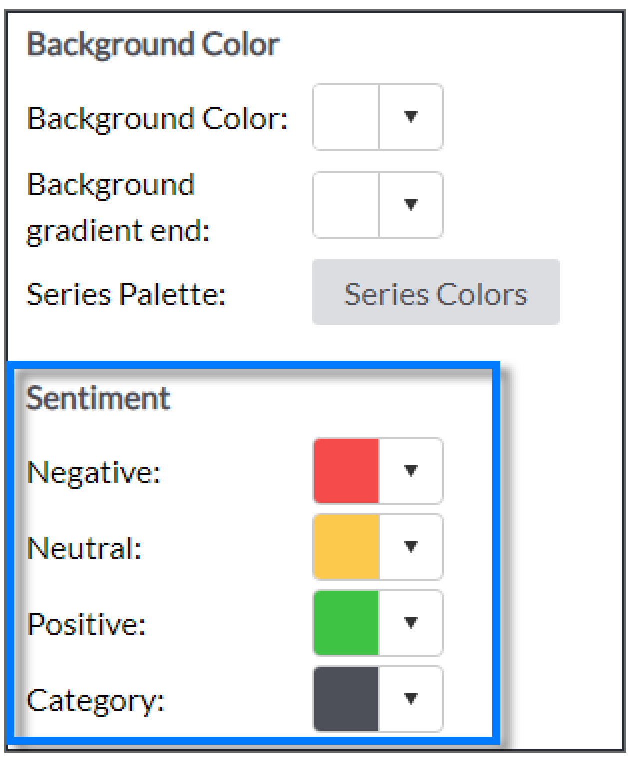
You can customize the color of the sentiments in the Text Analytics report elements.By default, the following colors are set for the sentiments:

- Negative sentiment – Red
- Neutral sentiment – Light Gray
- Positive sentiment – Blue
- Category – Dark Gray

Procedure

1. On the **Report Themes** page, open a theme, and click the **Charts** tab.
2. In the **Sentiment** section, select a color for the **Negative**, **Neutral**, and **Positive** sentiments and category from a palette.
   You can select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).

   If you know the hexadecimal value of a color, you can enter it manually or click the  icon to adjust red, green, blue, hue, saturation, and black level values.



The Sentiment section

You can preview the applied changes to the report element in the right pane.

Chapter 20

Embed Report Element

Topics

Manage Embed Report Element

Navigation

Design & Collect tab > **Surveys** tab > open a survey or create a new one > **Analyze** tab > **Reports** page > open a report or create a new one > select the report element to add to the report > **Embed Report Element** section.

You can use the HTML code snippet to place the report elements into a custom Web page and share your report results outside of the product. The HTML code of the selected report element is generated automatically for you. In addition, you can configure the report element by editing the code snippet in an HTML or text editor.

To access the code snippet of the report element, click the **Embed Report Element** collapsible menu on the report element editor panel.

You cannot embed the **Response List** report element. To display the embedded report element on the Web page, you should enable JavaScript and cookies in your browser's settings.

Generate and add a code snippet to a custom web page

Procedure

1. On the **Reports** page, create a new report.
2. In the **Name Your Report** dialog box, in the **Report Name** field, enter the name of a report.
3. Click **OK**.
4. On the report designer page, in the **Add a Report Element** area, select the report element.
5. In the element editor panel, click the **Embed Report Element** menu.
6. To generate the HTML code snippet for the selected report element, click the **Generate Code** button.
7. To select the entire generated code snippet, click within the text box.
8. Right-click the selected code, and click **Copy**.
9. Open any text editor, for example, **Notepad**, and insert the copied code snippet in the text editor.
10. Save the text file with the code snippet in the HTML format.
11. Open the saved HTML file, and you can view the report element in your Web browser.

Edit a code snippet

Procedure

1. Open the text file with the saved code snippet of the report element.
2. Edit the code snippet.
   You can configure the following parameters using the code snippet:
   - **W** – Define the width of the report element by setting a number, for example, &w=480. The value you input is measured in pixels.
   - **H** – Define the height of the report element by setting a number, for example, &h=360. The value you input is measured in pixels.

- **R** – Define the number of rows for the **Frequency Table** report element by adding the **r** parameter to the code snippet next to the **h** parameter, for example, &r=15. The valid range of values is from 10 to 150.

3 Save the changes in the HTML format.

4 Open the saved HTML file, and you can view the report element in your Web browser.

> You can switch to the Web page showing the report element and refresh the page to see the updated report element. It may take up to several minutes for the report element to update. So, it is recommended to clear the browser's cache to display the last changes correctly.

Delete a code snippet

Procedure

1 In the application, select the report element with the generated code snippet.

2 In the content area, click the **Delete** icon .

3 In the confirmation dialog box, click **Delete**.

Publish widget to URL

Navigation

Design & Collect tab > **Surveys** tab > open a survey or create a new one > **Analyze** tab > **Reports** page > open a report or create a new one > select the report element to add to the report > **Embed Report Element** section.

You can generate a URL with the report element (widget) in addition to the code snippet. Some Web pages do not allow the JavaScript code to be cut and pasted into the page. So, you have a choice of either embedding the JavaScript code or, if that is not possible, copying and pasting a link.

You can generate a URL with the widget while designing your report, and then copy and paste the URL into an IFrame on a custom page. The URL of the selected report element is generated automatically for you. In addition, you can edit the width and height of the report element on your custom page.

> You cannot embed the **Response List** report element.

Generate and add a URL to a custom page

Procedure

1. In the report designer, add a report element for which you want to generate a URL.
2. Click the **Embed Report Element** section.
3. Click the **Generate Code** button.
   The URL for the element is generated automatically.

> The **Generate Code** button disappears after generation.

4. To select the whole link, click within the text box with the URL.
5. Right-click in the text box, and click **Copy**.
6. Open the custom page where you want to place the report element.
7. Insert the copied URL into an IFrame on the custom page.
   The report element appears.

> You can insert the link directly in the Address bar of your Web browser and share the link with others.

Edit a report element on the custom page

The copied URL looks like this:

http://cog.example.com/Current/
ReportWidget.ashx?wid=ksGP30rsyt&w=480&h=360&htmlwrap=1

You can configure the following parameters for the embedded report element in the copied URL:

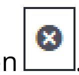
- **W** – Define the width of the report element by setting a number, for example, &w=480. The value you input is measured in pixels.
- **H** – Define the height of the report element by setting a number, for example, &h=360. The value you input is measured in pixels.
- **R** – Define the number of rows for the tables by adding the "r" parameter next to the "h" parameter, for example, &r=15. The valid range of values is from 10 to 150.

Also, you can edit the report element in the report designer as usually.

You may need to refresh the page to see the updated report element. It may take up to several minutes for the report element to update.

Delete a report element from the custom page

Procedure

1. In the report designer, select the report element with the generated URL that you want to delete.
2. In the right pane, hover over the report element, and click the **Delete** icon .
3. In the confirmation dialog box, click **Delete**.

Manage Responses

Topics

Response Manager Grid

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid.

You can view, delete, edit, and export your survey response data. In addition, you can filter, show or hide, validate, and sort response data. By default, the **Response Manager** grid displays the response data of 10 respondents, the dates they started and completed your survey, and the date you last modified their response data.

Actions menu

The **Actions** menu shows you a number of options how to customize your view of the **Response Manager** grid, edit responses, filter responses, import responses, and more. The following options are available:

- **View Data Type** – Specify what type of data you want to view in your **Response Manager** grid.
  - **Raw Data** – Display numeric values associated with responses.

    If a respondent does not see a question due to the designed survey logic, the choices of the skipped question are recorded as NULL* (not asked) in the **Response Manager** grid.

    For **Choose Many**, **Choose Many with Image**, and **Choose Many Matrix** questions, a choice (column or row) that is not displayed to the respondent (due to using **Hidden**, **Conditional Visibility**, **Number of Rows Visible** options, or piping) is also recorded as NULL (not asked) in the **Response Manager** grid.

    All report elements that support **Choose Many**, **Choose Many with Image**, or **Choose Many Matrix** questions record choices as the following values:
    NULL (not asked), 0 (not selected), and 1 (selected). NULL is the database value that is displayed as blank space in the EFM application.
  - **Choice Labels** – Display text associated with responses.

> You cannot re-import data that includes **Choice Labels**.

  - **Export Values** – Display values that you define in your survey. For example, if you want to display negative numbers in your **Response Manager** grid, specify this in the survey, and display it in the **Response Manager** grid.
- **Columns** – Specify which columns you want to display in your **Response Manager** grid. For example, you can hide the **Started** survey date and display your respondents' **Completed** survey date in the **Response Manager** grid.

  Clicking the **Columns** button opens the **Select Columns** dialog box, where you can select fields from the following folders: **Current survey**, **Respondent Fields**, **Respondent System Information**, **Respondent Location**, or **Surveys**.

You can track the **Respondent System Information** and **Respondent Location** only if the **Track Respondent Information** check box is selected on the **Properties** tab in survey designer. For more information, see Properties, page 482.

For **Contact List** campaign and multi-campaign survey (**Contact List** and **Panelist** campaigns), **Email** and **Mobile Number** columns are selected by default. For **Panelist** campaign, only **Panelist ID** column is selected by default.

For multi-campaign survey, if **Email** and **Mobile Number** columns are shown but values are empty for the **Panel respondent**, select the check box in **Columns** > **Panelists** > **Email** and **Mobile Number**.

If your survey has campaigns of different types, the **Surveys** and **Profiles** folders are not available in the **Select Columns** dialog box. In the **Surveys** folder, the surveys with multiple-campaign types are not available for selection if the current survey is a single-campaign one.

If there are one or more file imports mapped to your survey, then an additional section **Data Channels** appears in the **Select Columns** dialog box. You can make the columns from the selected file import visible in the **Response Manager** grid.

The data from the file import becomes available in the **Response Manager** grid only after a survey respondent submits a survey with the response that matches one of the values from the corresponding file import column.

- **Edit** – Use this feature to modify the response data submitted by a specific respondent. Select a response in the **Response Manager** grid, and then select the **Edit** option on the **Actions** menu.
- **Filter** – Use this feature to control types of information displayed in your **Response Manager** grid by defining certain filtering criteria. For example, you can exclude all responses that are larger than a certain value. You can also use the **Filter** option to search for a response you need by using the record ID.
  - In the **Add Filter Criteria** dialog box, if multiple campaign types are added to your survey, the **Surveys** option is hidden in the **Source** box.
  - In the **Surveys** folder, the surveys that contain multiple campaign types are unavailable for selection.
- **Clear All Filters** – Use this feature to remove any filter from your **Response Manager** grid. This means that responses will be displayed in your **Response Manager** grid based on the default view.
- **Generate Test Data** – Use this feature to insert test data into your survey automatically. You can define the number of responses that you want to generate and select the even or random response distribution type.

Generate Test Data is available for **Generate Link** distribution method only when the survey is in the Design mode. For **Create a List**, **Invite Panelists**, and **Require a Passcode** distribution methods, the **Generate Test Data** feature is not available. For multiple-campaign surveys, you can generate test data if the survey contains at least one **Survey Link**, **Social Media**, or **Offline Device** campaign.

- **Import** – Use this feature to import responses from a file or another survey into the current survey. For example, if you have collected the response data in a different survey and want to include this data into the current survey, select **Import** > **From Other Survey** on the **Actions** menu.

> You can only import responses into a **Generate Link** campaign. The time should be set to UTC time zone.

- **Export** – Use this feature to export data from the **Response Manager** grid into different file formats using the **Export** option. Select the export file format from the list of file types, which includes .csv, .tsv, xlsx, and .spss. If you have Tableau configured for your workgroup, you can also export responses into Tableau by clicking the **Export via Tableau** button. This will generate a URL that you will paste into Tableau Web Data Connector to export responses into Tableau. For information, see Import data from EFM into Tableau using Tableau WDC, page 1099.

  During the export process, you can customize how you want your data to be exported.

> You can also access the **Export** list on the toolbar of the **Response Manager** grid.

- **Validate Record** – Use this feature to clean data submitted by a respondent to account for skip patterns in your survey. This feature is only available if you select a certain response in the **Response Manager** grid.
- **Validate All Records** – Use this feature to clean data submitted by all respondents to account for skip patterns in your survey. This feature is only available if you select multiple responses in the **Response Manager** grid.
- **Update Profiles** – Use this option to update the profile information provided by panelists when responding the survey by using the **Update Profiles** option in the **Actions** drop-down menu on the **Response Manager** page. The **Update Profiles** option is available only for the **Invite Panelist** survey distribution method.
- **Export Selected Responses to PDF** – Export the responses that you need to the .pdf format. You can export single record and multiple records. For more information about exporting your responses to the .pdf format, see Print Respondent Record, page 989.
- **Delete Selected Respondent** – Use this feature to delete a selected respondent and all their response data from your **Response Manager** grid. This feature is only available if you select a respondent in the **Response Manager** grid.

> Some options on the **Actions** menu are disabled if no respondents are selected.

Date Filter

You can display response data based on the date when respondents provided their answers by clickig the **Date Filter** menu. For example, you can set the **Date Filter** to include responses from surveys that respondents completed today.

> If you select any **Date Filter** command, the response data is updated according to the current date.

Schedule Export

You can schedule export and email delivery of the responses to the recipients to analyze answers externally. You can schedule export by **Email**, to **Folder**, and to **SFTP**. You can export file in .csv, .tsv, .xlsx, and .spss file format. If there is an organization hierarchy defined for a workgroup, the export of responses is scoped according to the user's access level. For more information about scheduling import, see Schedule responses delivery, page 991.

> The scheduled export of responses is synchronized with the current date.

Frequency Chart

In your **Response Manager** grid, click the **Frequency Chart** icon  to view the **Frequency Chart**, which displays both the number and the percentage of respondents who answered the specified question.

Navigate the Response Manager grid

By default, the **Response Manager** grid only displays data for the first 10 respondents. To view more respondents per page, locate the **View per Page** options at the bottom of the **Response Manager** grid. Select the **25** link to display more respondents.

In addition, if your **Response Manager** grid is longer than one page, you can navigate between pages clicking the page navigation arrows in the lower-right corner of the **Response Manager** grid.

Additional columns in the Response Manager grid

If a survey includes the **Image Upload** question, additional columns displaying the **Image** link and rate are displayed in the grid.

To view the image:

- Click the **Image** link.

  OR
- Click the image Record ID, and then in the **Responses** dialog box, click the **Image** link.

If an image contains geolocation data, two more columns displaying the image's latitude and longitude are displayed. Also, if a respondent added tags to the image, a column displaying these tags is shown.

Click the **Image** link in the **Response Manager** grid to open the **Image** dialog box where you can view the image itself, the date when it was uploaded, the location it was taken at, and the tags added to the image. You can also rate the image and download it by clicking the **Download Image** link.

> In the **Image** dialog box, you can change the rating previously added to the image.

You can download the response image from the **Response Manager** page. After clicking the **Image** link in the **Response Manager** grid, click the **Download Image** link below the displayed image. If the response image is deleted from the **Images** tab, it is also deleted from the **Response Manager** grid.

Filter responses

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > click the **Filter** button.

You can control which responses to display in the **Response Manager** grid. For example, you can exclude all responses that are larger than a certain value.

You can add, copy, move up or move down, and delete the criteria.

Procedure

1 In the **Response Manager** grid, on the toolbar or on the **Actions** menu, click **Filter**.

2 In the **Filter** dialog box, click **Add** or **Add Filter Criteria**.

3 In the **Add Filter Criteria** dialog box, on the **Source** menu, select source data for your filter.
You can choose data from the **Current Survey**, **Columns** (**Participant Information**, **Respondent System Information**, or **Respondent Location**), **Surveys**, or **Data Channels**.

> The **Data Channels** group becomes available when at least one data channel is created for the survey.

If multiple campaign types are added to your survey, the **Surveys** group is not available on the **Source** menu. In the **Surveys** group, the surveys with multiple campaigns are not available for selection.

4 On the **Fields** menu, select a question or field to be checked against the criteria.

5 On the **Expression** menu, select the expression.
The available options vary depending on the question type.

6 In the **Value** text box, specify the value that the field should match.

7 Click **Add**.
You can combine your filters by selecting the check boxes and using menus with logical operators next to each criterion.

8 To see the result, in the **Response Manager** grid, click **Apply Filter**.

Test Data Generator

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Actions** menu > click **Generate Test Data**.

With the test data generator, you can insert test data into your survey automatically. It is a quick and easy way to test your survey. You can specify how many responses you want to generate and whether the responses are distributed evenly or randomly.

Generate Test Data is available only when the survey is in the **Design** mode.

The test data generator is intended for testing and demonstration purposes only. The process of generating test data includes inserting random data into your survey and cannot be undone, which can significantly affect your reports and analysis data.

On the **Response Manager** page, the generated test data appears. By default, the **Response Manager** grid shows the first 10 responses. To view more responses per page, click the **View per Page** option. Select the 25 link to display more responses. In addition, if the **Response Manager** grid is longer than one page, you can navigate between the pages by clicking the navigation arrows.

Generate Test Data

Procedure

1. On the **My Surveys** page, create a new survey or open a saved one.
   The survey designer opens.
2. Go to the **Analyze** tab > **Responses** tab.
   The **Response Manager** page opens.
3. On the **Actions** menu, select the **Generate Test Data** option.
   The test data generator dialog box opens.
4. In the **Number of Responses to Generate** box, enter the number of responses that you want to generate.
   Default value is **100**.
5. To enable even or random response distribution, in the **Distribution Type** box, select the corresponding option.
6. To include the responses for not answered and not asked questions, in the **Response Options** section, select the corresponding check boxes.
7. To facilitate trending, in the **Trend Options** section, define the start and end dates.
   You can use the **Calendar** icon or enter the dates into the calendar boxes manually.
8. Click **Next**.
9. To begin the generating test data process, in the confirmation dialog box, click the **Generate Test Data** button.
   The test data is generated, and the task completion message appears.

10 Click **Close**.
In the **Response Manager** grid, the generated responses test data are displayed.

Survey link in response data

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid.

You can access the survey through a piped link in the response data. The survey link is available in the responses grid and in the response record for all survey types. The survey link should start with a survey engine path for the current group to appear as a link, otherwise it appears as text.

> The survey engine path is specified on the **Configuration** tab > **Publishing** tab.

Procedure

1. Go to the **Responses** tab.
2. In the **Responses** grid, in the response column, click the survey link.
   The survey opens for you.

> To access the response record, click the **Record ID** value in the specific row.

Tracking the response source

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > add the **Response Source** column (if not available).

You can track whether a survey is completed via the intercept, mobile, or any other channel to see which channels are the most popular.

In the **Response Source** column, there are five types of response source that are displayed:

- **Web Intercept** – Survey responses received via a web intercept.
- **Mobile** – Survey responses received via a mobile browser.
- **Online** – Survey responses received via a survey link.
- **Offline** – Survey responses received via Mobile Survey PC Edition.
- **SMS** – Survey responses received via the SMS interface.

By default, the **Response Source** column is not available. You can add this column to the **Responses** grid by clicking the **Columns** button on the toolbar.

View the Response Source column

Procedure

1. On the **Responses** tab, click the **Columns** button.
2. Click the arrow next to the **Respondent Fields** folder name to expand it.
3. Select the check box next to the **Response Source** column.
4. Click **Apply**.
   The column appears on the responses grid.

Filter by response source

Procedure

1. On the **Responses** tab, click the **Filter** button.
2. In the **Filter** dialog box, click the **Add** button or the **Add Filter Criteria** link.
3. In the **Add Filter Criteria** dialog box, in the **Source** list, select **Participant Information**.
4. In the **Field** list, select **Response Source**.
5. In the **Expression** list, select "**=**" to include the survey responses in the filter or select "≠" to exclude them.

6. In the **Value** list, select the response channel by which you want to filter.
7. Click **Add**.
   The filter appears in the **Filter** dialog box.
8. Click the **Apply Filter** button.

Referring URL

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > add the **Referring URL** column (if not available).

You can view what web page the users are on when the intercept is displayed. Using this data, you can optimize the future deployment of the intercept.

When the survey is taken from a mobile offline device, the ID of the device registered on the **Administration** tab appears in the **Referring URL** column.

By default, the **Referring URL** column is not available. You can add this column to the responses grid by clicking the **Columns** button on the toolbar.

View the Referring URL column

Procedure

1. On the **Responses** tab, click the **Columns** button.
2. Click the arrow next to the **Respondent Fields** folder name to expand it.
3. Select the check box next to the **Referring URL** field.
4. Click **Apply**.
   The column appears on the responses grid.

Hiding the Email column

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Email** column.

You can hide the **Email** column in the **Responses** grid. If you hide the **Email** column, you cannot add columns to your survey from other surveys. The **Survey** folder is hidden in the **Select Columns** dialog box.

By default, the **Email** column appears in the **Responses** grid.

Procedure

1. On the **Responses** tab, click the **Columns** button.
2. In the **Select Columns** dialog box, click the red arrow next to the **Respondent Fields** folder to expand it.
3. Clear the check box next to the **Email** field.
4. Click **Apply**.
   The **Email** column disappears from the **Responses** grid.

Displaying only complete responses

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid.

You can select the **Completes Only** response type so that only valid and full responses are included in the reports. This functionality is also available for the profiles. You can toggle between the two response types **Completes Only** and **All Responses** in the **Responses** grid and in the report designer. The **All Responses** option is selected by default.

This functionality applies only to the current response grid and report. Thus, different reports can have it activated or not. You can select between the following response types:

- **Completes Only** – Click to view complete responses only. The **Responses** grid is updated and shows the complete responses only. The response is set to complete status when the respondent submits the survey.
- **All Responses** – Click to view all responses. The responses grid is updated and shows all the responses.

In the report designer, you can toggle between the response types by selecting the **Only show completed responses** check box in the **Filter Report Data** dialog box.

Select the response type in the report designer

Procedure

1. In the report designer, on the toolbar, click the **Filter Report Data** button.
2. In the **Filter Report Data** dialog box , select the **Only show completed responses** check box.
3. Click **OK**.
   The **Completed Responses Only** notification is displayed at the top of the report designer in yellow.

Print Respondent Record

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Actions** menu on the toolbar > **Print Selected Responses to PDF** option.

You can export respondent records to the Adobe PDF format, and then print them to have a hard copy of how the person answered your survey. You can export single record and multiple records. The respondent record ID is included into the export file to differentiate responses from different users. Responses from different users are also separated by a page break.

The following information is exported:

- Question Text
- Response
- Status

> You need to have permissions to export responses.

Print a single response to PDF

Procedure

1. In the **Response Manager** grid, click the respondent record that you want to export.
2. In the **Responses** dialog box, click the **Export Response to PDF** link in the upper-right corner.
   The file is exported to the Adobe PDF format.
3. Click the link with the file name to save or open the file.
4. Click **Close**.

Print multiple responses to PDF

Procedure

1. In the **Response Manager** grid, select the check boxes next to the responses that you want to export.

> To select all records on the page, select the check box to the left of the **Record ID** column. To select all records on all pages, click the **Select all "N" entries in this grid** link.

2. On the **Actions** menu on the toolbar, click **Export Selected Responses to PDF**.
   The file is exported to the Adobe PDF file format.
3. In the **Print Responses to PDF** dialog box, click the link with the file name to save or open the file.

> If the amount of selected responses is too large for export, select fewer responses and export again.

4 Click **Close**.

Schedule responses delivery

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Schedule Export** list > click the **Email**, **Folder**, or **SFTP** delivery type.

You can schedule export of the survey responses to analyze externally.

If there is an organization hierarchy defined for a workgroup, the export of responses is scoped according to the user's access level.

The following schedule export options are available:

- Schedule Export by Email, page 992
- Schedule Export to Folder, page 994
- Schedule Export to SFTP, page 995

If you close a survey, the scheduled responses export is performed one more time. If you reopen the survey, the export of responses is performed till the scheduled date expires.

Schedule Export by Email

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Schedule Export** list > **Email**.

You can schedule export and email delivery of responses to the recipients.

> If you close a survey, the scheduled responses export is performed one more time. If you reopen the survey, the export of responses is performed till the scheduled date expires.

Procedure

1. On the **Responses** tab, in the **Schedule Export** list, click **Email**.
2. On the **Schedule Export Delivery Page**, in the **Select Format** list, select the file format of the report (CSV, TSV, Microsoft Excel, or SPSS). If you want to zip the attachment, click the **Zip attachments** check box, and the report in the selected format is attached to the email message in a ZIP archive.

> If you want to specify the formatting options for your scheduled response exports, click the **Export Options** link next to the **Select Format** list, and then select the appropriate options. In the **Export Responses** dialog box, after saving the formatting option specifications, the generated export file of the next scheduled occurrence adhere to the last customized specified format options.

> If you applied a filter in the **Export Responses Scheduled** dialog box for your scheduled response exports previously, you need to make sure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter to your report when scheduling export of your responses not for the first time, on the **Schedule Export Delivery** page, click the **Export Options** link, in the **Export Responses Scheduled** dialog box, make sure that the **Current Filter** option is selected, and then click **Save**.

3. To add the recipients, do the following:
   a. In the **To** text box, type the email address.

> You can add multiple addresses separating them by commas or semicolons.

   b. If there are organizations in a workgroup, you can click the **To** button to select the recipients. In the **Survey Responses Recipients** dialog box, select a check box next to the user or organization, click the right arrow button to add them to the **Recipients** list, and then click **OK**.
4. In the **From** text box, specify the email address from which you want to send your message. By default, your email address is selected.
5. In the **Subject** text box, type the message subject.
   By default, it is **Responses for <survey name>**.
6. In the email body, type the message text and customize it by using the editing toolbar.
7. To preview your message, click the **Preview** button.

8 To test your message before delivering it to the recipient, do the following:
   a. Click the **Send Test Email** button.
   b. In the **Send Test Email** dialog box, in the **Email Address** field, type the test email address, and then click the **Send** button.

9 In the **Delivery Schedule** section, define when and how to deliver the responses:
   - **No Scheduling** – Select to send your message later. You may need it if you have not finished adding recipients or writing your message, or have not yet decided when to send the message. This option removes scheduling and stops sending of email notifications.
   - **Send Now** – Select to end your message immediately.

> There may be a delay of several minutes before your email is delivered.

   - **Send at a specific date and time** – Specify a date and time when you want to deliver your email message. Select a valid start date and time; otherwise, the email message will not be saved.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set an end date or select **No End Date**.

10 Click **Save**.

> When the **Send Now** option is selected in the **Delivery Schedule** section, the **Send Report** button is displayed instead of the **Save** button.

Schedule Export to Folder

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Schedule Export** list > click **Folder**.

You can schedule export of responses to the EFM local folder, which is located in {EFM Install}\AppData\{groupID}\Responses\{projectID}.

> If you close a survey, the scheduled responses export is performed one more time. If you reopen the survey, the export of responses is performed till the scheduled date expires.

Procedure

1. On the **Responses** tab, in the **Schedule Export** list, click **Folder**.
2. On the **Schedule Export Delivery Page**, in the **Select Format** list, select the format of the file (CSV, TSV, Microsoft Excel, or SPSS) to export to the EFM local folder. The file in the selected format will be exported to the EFM local folder.

> If you want to specify the formatting options for your scheduled response exports, click the **Export Options** link next to the **Select Format** list, and then select the appropriate options. In the **Export Responses** dialog box, after saving the formatting option specifications, the generated export file of the next scheduled occurrence adhere to the last customized specified format options.

> If you applied a filter in the **Export Responses to Folder Scheduled** dialog box for your scheduled response exports previously, you need to make sure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter to your report when scheduling export of your responses, on the **Schedule Export Delivery** page, click the **Export Options** link, in the **Export Responses to Folder Scheduled**dialog box, make sure that the **Current Filter** option is selected, and then click **Save**.

3. In the **Delivery Schedule** section, define when and how to deliver the responses:
   - **No Scheduling** – Select to end your file later. You may need it if you have not yet decided when to export file. This option removes scheduling and stops sending of email notifications.
   - **Export Now** – Export responses immediately.
   - **Export at a specific date and time** – Specify a date and time when you want to export your file. Select a valid start date and time; otherwise, the file will not be saved.

> To schedule a regular export (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set an end date or click **No End Date**.

4. Click **Save**.

> When the **Export Now** option is selected in the **Delivery Schedule** section, the **Export Now** button is displayed instead of the **Save** button.

Schedule Export to SFTP

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Schedule Export** list > click **SFTP**.

You can schedule export of responses to SFTP.

> If you close a survey, the scheduled responses export is performed one more time. If you reopen the survey, the export of responses is performed till the scheduled date expires.

Procedure

1 On the **Responses** tab, in the **Schedule Export** list, click **SFTP**.

2 On the **SFTP Delivery Page**, in the **Select Format** list, click the needed file format: CSV, TSV, Microsoft Excel, or SPSS. The report in the selected format will be exported to the set location.

> If you want to specify the formatting options for your scheduled response exports, click the **Export Options** link next to the **Select Format** list, and then select the appropriate options. In the **Export Responses** dialog box, after saving the formatting option specifications, the generated export file of the next scheduled occurrence adhere to the last customized specified format options.

> If you applied a filter in the **Export Responses to SFTP Scheduled** dialog box for your scheduled response exports previously, you need to make sure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter to your report when scheduling export of your responses, on the **SFTP Delivery** page, click the **Export Options** link, in the **Export Responses to SFTP Scheduled dialog** box, make sure that the **Current Filter** option is selected, and then click **Save**.

3 In the **SFTP Settings** sections, configure your SSH FTP connection:

- **Server name** – Name of the server where SFTP is located and where you want to export the file.
- **Port** – Port number for the specified server.
- **Path** – Location on a server to where you want to export the file.
- **User Name** – User name for the specified server.
- **Password** – Password for the specified server.

4 To validate connection, click **Test Settings**.

5 In the **Delivery Schedule** section, define the responses delivery schedule and the recurrence options. The following options are available:

- **No Scheduling** – Send your file later. You may want to select it if you have not yet decided when to export file. This option removes scheduling and stops sending of email notifications.
- **Export Now** – Export responses immediately.
- **Export at a specific date and time** – Specify a date and time when you want to export your file. You can either type the date and time manually into the available text field or select the date

and time from pop-up menus. Select a valid start date and time, otherwise the file will not be saved.

Click the **Show Recurrence Options** link to set recurrence options for your file delivery. Use this functionality to export a file multiple times on a daily, weekly, or monthly basis. You can also set an end date or select **No End Date**.

6 Click **Save**.

When the **Export Now** option is selected in the **Delivery Schedule** section, the **Export Now** button is displayed instead of the **Save** button.

Displaying only valid question responses

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > click the response ID.

You can filter the respondent record to view only valid responses by selecting the **Only show valid question responses** check box. By default, the **Only show valid question responses** check box is not selected.

When you export the respondent record to the Adobe PDF format, the exported file data is displayed depending on the **Only show valid question responses** option. If the **Only show valid question responses** check box is selected, only valid responses are displayed in the exported file.

You can also access the **Only show valid question responses** option in the **View Responses** dialog box of the Text Analytics report elements.

Validating records

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > **Actions** menu > **Validate Record** option.

This topic explains how data that is submitted by respondents can be cleaned to account for skip patterns in the survey. This is useful in four cases:

- **Jump** – A respondent uses the **Jump** button to answer a question that violates a skip pattern inside the survey.
- **Branching** – A respondent answers a question that has branching logic in it, uses the **Back** button to change their previous answer and proceeds down a different branching logic line.
- **Conditional Choice/Question/Page** – A respondent answers a question that has a Conditional Choice on a response option, uses the **Back** button to change the previous answer, and proceeds to a different page due to the Conditional Logic of the new response.
- **Drilldown** – A respondent answers the preliminary question and is taken to the Table question where only the table topics of their previous answered questions are displayed. Later, the respondents use the **Jump** or **Back** button to deselect their answers to the preliminary question, but never revisit the Table question to clear this data. **Validate Records** will remove the data from topic(s) in the Table question where the topic(s) in the preliminary question is now unanswered.

If a respondent does not see a question due to the designed survey logic, the choices of the skipped question are recorded as NULL* (not asked) in the **Response Manager**.

For **Choose Many**, **Choose Many with Image**, and **Choose Many Matrix** questions, a choice (column or row) that is not displayed to the respondent (due to using **Hidden**, **Conditional Visibility**, **Number of Rows Visible** options, or piping) is also recorded as NULL* (not asked) in the **Response Manager**.

All report elements that support **Choose Many**, **Choose Many with Image**, or **Choose Many Matrix** questions record choices as the following values: NULL (not asked), 0 (not selected), and 1 (selected). NULL is the database value that is displayed as blank space in the EFM application.

If you plan on using the **Validate Records** function in the EFM application, adhere to the following additional restrictions on branching; otherwise, unintended data deletion may occur.

- The advanced branch checkpoint question must be the last question on a page.
- A question that has basic branching in it must be the last question on a page.
- The target question of a branch must be the first question on a page.

Records in the database can be validated either one at a time or all at once. Steps for how to do both are included in the sections below.

Validate a single record

Procedure

1. On the **My Surveys** page, open a saved survey to validate its data.
   The survey designer opens.
2. Click the **Analyze** tab.
3. On the **Reports** page, click the **Responses** tab.

4 On the **Response Manager** page, select a response record to validate.
5 On the **Actions** menu, select **Validate Record**.

Validate all records

Procedure

1 On the **My Surveys** page, open a saved survey to validate its data.
The survey designer opens.
2 Click the **Analyze** tab.
3 On the **Reports** page, click the **Responses** tab.
4 On the **Actions** menu, select **Validate All Records**.
5 To validate all records page, type **YES** in all caps, and then click **OK**.
To leave the database records as they were, click **Cancel**.

While the records are being validated, a system busy message is displayed.

6 Click **Close**.

Last Page Visited

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > add the **Last Page** column (if not available).

You can view the last page the respondent visited in your survey. So, you can track where most respondents are leaving the survey, and then edit the survey to improve the response rates. The page name is available in the **Last Page** column on the **Response Manager** page. This column displays the name you defined for this page during the survey creation. The page you see in the column is the last page where the respondent clicked **Next** or **Submit** in your survey.

By default, the **Last Page** column is not available. You can add this column to the **Response Manager** page by clicking the **Columns** button on the toolbar. Also, you can select the **View Data Type** > **Raw Data** on the **Actions** menu to view the page values that are stored in the database. The values are the survey page URLs.

> You can export the **Last Page** column, but cannot import it.

In the **Modern** survey rendering mode, the page name and page URL are not available, only page ID. You can view the page ID if you select the **View Data Type** > **Raw Data** on the **Actions** menu.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

View the Last Page column

Procedure

1. On the **Response Manager** page, click the **Columns** button.
2. Click the red right arrow next to the **Respondent Fields** folder name to expand it.
3. Select the check box next to the **Last Page** field.
4. Click **Apply**.
   The column appears on the **Response Manager** page.

Filtering by the Last Visited Page

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Response Manager** grid > click **Filter**.

You can filter the report data by the **Last Page** column. The **Last Page** column displays the names of the last pages the respondents visited in your survey. The filter by the last pages is available on the **Response Manager** and **Manage Participants** pages.

Survey pages may have custom names, for example, "Entertainment" instead of "Page 2", but it does not affect the work of the filter.

In the **Modern** survey rendering mode, the page name and page URL are not available, only page ID. You can view the page ID if you select the **View Data Type** > **Raw Data** on the **Actions** menu.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

Procedure

1. On the **Response Manager** page, click the **Filter** button.
2. In the **Filter** dialog box , click the **Add** button or the **Add Filter Criteria** link.
   The **Add Filter Criteria** dialog box opens.
3. In the **Source** list, select **Participant Information**.
4. In the **Field** list, select **Last Page**.
5. In the **Expression** list, select the appropriate expression, for example, "**<**".
6. In the **Value** list, select the survey page by which you want to filter the data, for example, "Page 4".
7. Click **Add**.
   The filter appears in the **Filter** dialog box.
8. Click the **Apply Filter** button.
   The responses from respondents who left the survey on pages 1-3 appear.

Branched Out and Over Quota columns in reporting

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Collect** tab > select the survey distribution method > **Manage Participants** or **Responses** page > **Branched Out** and **Over Quota** columns.

You can track the time when respondents were branched out of your survey or reached the over quota limit. The time is available in the **Branched Out** and **Over Quota** columns correspondingly. The **Branched Out** and **Over Quota** columns appear by default.

Also, you can view the **Branched Out** and **Over Quota** columns in the **Participant Information** dialog box.

The **Over Quota** column appears only if the **Quota Management** functionality is available for your workgroup.

If a respondent goes back to a survey and changes the answer to the survey, the last survey status wins. For example, if the respondent is branched out, and then goes back and completes the survey, the respondent's status is Completed. If the respondent completes the survey, and then goes back, changes the answers, and is branched out, the respondent's status is Branched Out.

Filtering by Branched Out and Over Quota

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Analyze** tab > **Responses** tab > **Filter** button.

You can filter a report by the **Branched Out** and **Over Quota** date. So, you can better manage your reporting data by either including the **Branched Out** and **Over Quota** responses into your report or removing such responses from it.

The filters are available in the various locations, including the **Responses** page, the **Manage Participants** page, and the report designer.

Set a Date over quota filter in the report designer

The **Date over quota** option appears only if the Quota Management functionality is available for your workgroup.

Procedure

1. In the report designer, click the **Filter Report Data** button.
2. Click the **Add Another Criteria** link.
3. In the **Question** list, select the **Date over quota** option.
4. In the **Expression** list, select <=>.
5. Set the date by which you want to filter the **Over Quota** responses in the **Value** text box. For example, 10/23/2011.
6. To save the filter criteria, click the **Save** link.
7. Click **OK**.
   All responses that are over quota on 10/23/2011 appear.

You can use the similar steps to create a **Date Branched Out** filter.

Set a Branched Out filter on the Manage Participants page

Procedure

1. On the **Manage Participants** page, click the **Filter** button.
2. In the **Filter** dialog box, click the **Add** button or the **Add Filter Criteria** link.
3. In the **Add Filter Criteria** dialog box, in the **Source** list, select **Participant Information**.
4. In the **Field** list, select the **Branched Out** option.
5. In the **Expression** list, select <=>.
6. In the **Value** field, set the date by which you want to filter the **Branched Out** responses. For example, 1/6/2018.

7 Click **Add**.
The new filter appears in the **Filter** dialog box.

8 Click the **Apply Filter** button.
On the **Manage Participants** page, you can view participants who are branched out on 1/6/2018.

> You can use the similar steps to create an filter.

Set a Branched Out Date filter on the Response Manager page

Procedure

1 On the **Responses** page, click the **Date Filter** button, and then select the period by which you want to filter the responses.

2 Select the **Branched Out Date** option.

3 Click **OK**.
All responses that are branched out during the specified time period appear in the **Responses** grid.

> You can use the similar steps to create an **Over Quota Date** filter.

Export response data

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Quick Download** option > download your responses to a variety of formats.

You can now download your responses in the .xlsx, .csv, .tsv, or .spss. The Quick Download feature is available for a survey in the **Design**, **Open**, or **Closed** status.

All response data from the current survey is exported with the question headings and choice labels.

By default, the report values for question choices start at 1 and can be overridden by entering a value starting at 0 (zero). The report values for Not Answered questions have a definition of 0 (zero).

When exporting response data using **Export Values**, unanswered questions are set to the Not Answered value of 0 (zero). So any export value set to 0 (zero) is indistinguishable from the Not Answered value.

When exporting response data using **Report Values**, the unanswered questions are left blank. So a report value set to 0 (zero) is distinguishable from the Not Answered value.

Procedure

1. Click the **Analyze** tab.
   The **Analyze** landing page appears if you do not have any reports yet.
2. Click the appropriate button to download the responses to a file.
   The available options are **Download to Excel**, **Download to CSV**, **Download to TSV**, and **Download to SPSS**.
3. The export file is generated in the selected format.

> Time stamps are exported in your local time zone.

4. Click the link that appears to save or open the file.

Export to CSV

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export to CSV** feature.

The **Export to CSV** feature enables you to save survey response data to your computer in the .csv format. You can access this feature on the **Actions** menu > **Export** > **CSV** option or directly on the toolbar.

Procedure

1 On the **Export** menu, select **CSV**.
The **Export Responses** dialog box opens.

> If your export includes options marked with an asterisk, you cannot import the data back into the application.

2 To display a dialog box with a download link to the export file, select the appropriate options, and then click **Next**.

3 Click the link that appears to save or open the file.

Export to Excel

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export to Excel** feature.

The **Export to Excel** feature enables you to save survey response data to your computer in the Microsoft Excel format. You can access this feature on the **Actions** menu > **Export** > **Microsoft Excel** option or directly on the toolbar.

Procedure

1 On the **Export** menu, select **Microsoft Excel**.
The **Export Responses** dialog box opens.

> If your export includes options marked with an asterisk, you cannot import the data back into the application.

2 To display a dialog box with a download link to the export file, select the appropriate options, and then click **Next**.

3 To save or open the file, click the link that appears.

Excel export restrictions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export** menu > **Microsoft Excel** option.

If you export a large amount of responses to Microsoft Excel, which may consume a lot of memory, the export is restricted. In such case, you are offered to export responses to the .csv file format. If you agree, the system automatically exports all data to the .csv file, which you try to export to Microsoft Excel. You can open the .csv file with Microsoft Excel.

Export large data sets to Microsoft Excel

Procedure

1. On the **Export** menu, select **Microsoft Excel**.
2. In the export restriction dialog box, click the **Export to CSV** button.
3. In the **Export Responses** dialog box, select the appropriate options, and then click **Next**.
4. Click the download link.
5. In the **File Download** dialog box, click **Save**.

Export large panelist data to Microsoft Excel

Procedure

1. Go to the **Panel** tab > **Panelists** tab.
2. On the **Actions** menu, point to **Export**, and then click **Microsoft Excel**.
   For the large datasets, the export is restricted.
3. Click the **Export to CSV** button.
4. In the **Export Panelists** dialog box, click the download link, and then save the file.
5. Import the saved .csv file into Microsoft Excel.

Export to SPSS

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export to SPSS** feature.

With the **Export to SPSS** feature, you can save the survey response data to your computer in the SPSS format. You can access this feature using the **Export** > **SPSS** option on the **Actions** menu or directly on the toolbar.

Procedure

1. On the **Export** menu, select **SPSS**.
2. In the **Export Responses** dialog box, in the **Columns** section, select data export options:
   - **Displayed Data** – Only data available at the **Responses** side tab will appear in the exported file.
   - **All Response Data from the Current Survey** – All response data from the current survey is exported with the question headings and choice labels.
3. In the **Filter** section, define if any filter is applied to the exported response data:
   - **No Filter** – With this option, the exported file uses no filters.
   - **Current Filter** – This option applies the current filter to the exported response data.
4. In the **Content** section, select the content type to export:
   - **Raw Values with Choice Labels** – Export numeric database code values that you have defined in your survey as the response options and text associated with responses. For not selected responses the code value is set to 0. For each selected response the code value is set to 1.
   - **Report Values with Choice Labels** – Export positive whole numbers that you have defined in your survey as the response options and text associated with responses. Report values should be set to unique values for SPSS Analysis.
   - **Export Values** – Export alphanumeric values that you have defined in your survey as the response options.

     If the question or at least one of the question choices has an export value defined only as numeric, after exporting the responses to SPSS, in the SPSS Data Dictionary, the value type for the corresponding question or choice is displayed as Numeric in the **Type** column.

     If the question or at least one of the question choices has an export value defined as alphanumeric, after exporting the responses to SPSS, in the SPSS Data Dictionary, the value type for the corresponding question or choice is displayed as string in the **Type** column.

     If the export values are not defined in the question or question choices, after exporting the responses to SPSS, in the SPSS Data Dictionary, the value type for the corresponding question or choice is displayed as Numeric in the **Type** column.
5. Define missing value for not asked **Choose One** and **Choose Many** questions by selecting the corresponding check box. By default, this option is not active. The system value appears in the export file when the option is not active.
6. Enter the whole number for missing value into the text box.
   The default value is set to 99999999.
7. Click **Next**.
8. In the opened dialog box, click the link that appears to save or open the file.

Export the Unicode languages to SPSS

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export to SPSS** feature.

You can export survey responses to SPSS in any Unicode language such as Hebrew, Korean, or Japanese. Unicode is supported in SPSS versions 16 and higher.

You need to have SPSS version 16 and higher on your computer to view the Unicode languages in exported file. The **Unicode** character encoding must be set in SPSS to view the data.

Procedure

1. Open SPSS.
2. On the **Edit** menu, click **Options**.
   opens.
3. In the **Options** dialog box, on the **General** tab, select the **Unicode** option.
4. Click **Apply**.
5. Click **OK**.

Export to TSV

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export to TSV** feature.

The **Export to TSV** feature enables you to save survey response data to your computer in the .tsv format. You can access on the **Actions** menu > **Export** > **TSV** feature or directly on the toolbar.

Procedure

1 On the **Export** menu, select **TSV**.
The **Export Responses** dialog box opens.

If your export includes options marked with an asterisk, you cannot import the data back into the application.

2 To display a dialog box with a download link to the export file, select the appropriate options, and then click **Next**.

3 Click the link that appears to save or open the file.

Downloading reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Reports** page > **Download Report** menu.

You can export your reports to the Microsoft Word, Microsoft PowerPoint, or Adobe PDF format and create a cluster report to view the report results outside of the product. You can export reports from the **Reports** page or from a report designer using the **Download Report** menu.

The appearance of the exported report differs from the online report because the theme and table appearance changes are unavailable in the exported files. However, the **Question Text Color** and **Question Description Color** of custom report themes are rendered correctly in the exported reports.

You can use the **Export Free-Form Text Questions** option in the **Report Export** dialog box for PowerPoint to include all the **Response List** report elements in your report. The **Response List** report element is often used for comment-essay questions, which may contain a lot of text. If you want to include the survey comments into the exported reports, use the Microsoft PowerPoint output format because it extends the comments table into multiple slides, if required.

Cluster Reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Reports** page > **Download Report** menu > **Cluster Report** option.

With a cluster report, you can filter survey responses by a single question and view the exported results in the Adobe PDF, Microsoft Word, or Microsoft PowerPoint format outside of the product.

> The appearance of the exported report differs from the online report because the theme and table appearance changes are not reflected in the exported files.

Create a Cluster Report

Procedure

1. On the **Reports** page, create a new report or open a saved one.
2. On the report designer page, on the **Download Report** menu on the toolbar, select **Cluster Report**.
3. In the export report dialog box, in the **Question** list, define the base question for the cluster report.
4. To add a brand logo to your report, select the **Include Brand Logo** check box.
5. Select the output format for your cluster report.
   The available options are PDF, Microsoft Word, and PowerPoint.
6. Enter the minimum number of responses required to generate a report into the corresponding text box.
7. Click **OK**.
   Your cluster report is generated as a ZIP archive.
8. To save or open the exported cluster report, click the link that appears.

Completes Only notification in exported reports

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab >**Reports** page > create a new report or open a saved one > **Filter Report Data** button > **Filter Report Data** dialog box > **Other** section > click **Only show completed responses** > click **OK** > **Download Report** menu > export a report.

You can filter the report data so that only valid and full responses are included in the reports. When you export the report containing only completed responses to the Microsoft Word, Microsoft PowerPoint, and Adobe PDF formats or create a cluster report, the corresponding notification appears in the export file.

For more information on the report filters, see Filters, page 723.

Procedure

1. Open the report on the report designer page.
2. Click the **Filter Report Data** button on the toolbar.
3. In the **Filter Report Data** dialog box, in the **Other** section, select the **Only show completed responses** check box.
4. Click **OK**.
5. On the **Download Report** menu, export the report data.
   In the exported report, you can see the notification that only completed responses are included in the report.

Chapter 22

Weighting

Topics

Weighting overview

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

You can calculate a specific weight per survey respondent to ensure an accurate representation of a specific population, for example, Males vs. Females, within the data set. The main idea of weighting is to increase or decrease the importance of responses provided by one group of respondents as compared with another group in the demographic calculations, for example, to make sample response data set look more preferable.

When you click the **Weighting** tab, the **Weighting** page opens. On the toolbar, click the **Add Criteria** button to add new criteria for response weighting calculation.

On the **Weighting** grid, the following sections are available:

- **Questions** – Shows the survey question response choices selected for weighting.
- **Actual** – Shows the actual number and percentage of response choice selected by respondents.
- **Desired** – You can define the custom percentage of response choices, which you want to calculate by weighting. By default, the **Desired (N)** and **Desired (%)** fields are empty. When you change the **Desired (%)** value, the **Desired (N)**, **Weight**, and **Remaining Respondents** fields are updated automatically.
- **Weight** – Shows the calculated weight for the corresponding response choice. The weight is calculated as follows:

  Desired Percent / Actual Percent = Weight
- **Remaining Respondents** – Shows the number and percentage of respondents not covered by any weighting criteria.

Define weighting for the Choose One questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

Procedure

1 Go to the **Design & Collect** tab > **Surveys** tab.

2 On the **My Surveys** page, create a new survey or open an existing one.

3 Go to the **Analyze** tab > report landing page.

4 Click the **Weighting** tab.

5 On the **Weighting** page, click the **Add Criteria** button or **Add Criteria** link.

6 In the **Add Criteria** dialog box, select the **Choose One** survey question.

> Hover over the question to see the tool tip with the question and its response choices.

7 Click **Next**.

8 In the response choices selection dialog box, select the response choices that you want to cover by weighting criteria.

> You can group responses if you want. For details on grouping responses, see Define weighting for Choose One questions grouping, page 1020.

9 Click **Finish**. The defined weighting criteria show on the **Weighting** page.

10 In the **Desired (%)** text box, enter the weighting percentage that you want to define for each response choice.

The weighting scheme is updated and saved automatically.

Define weighting for the Choose Many questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

Procedure

1. Go to the **Design & Collect** tab > **Surveys** tab.
2. On the **My Surveys** page, create a new survey or open an existing one.
3. Go to the **Analyze** tab > report landing page.
4. Click the **Weighting** tab.
5. On the **Weighting** page, click the **Add Criteria** button or **Add Criteria** link.
6. In the **Add Criteria** dialog box, select the **Choose One** survey question, and then click **Next**.

> Hover over the question to see the tool tip with the question and its response choices.

7. To create a segment for weighting, click the **Add Segment** button or **Add Segment** link.
8. In the **Add Segment** dialog box, on the **Required State** menu, select the state for each choice to determine which states should be covered by the segment.

   The following options are available:

- **Not Selected** – The respondents do not select this choice in your survey.
- **Selected** – The respondents select this choice in your survey.
- **Any State** – The response choice selection does not matter.

9. Click **Add**.

> The segments must be mutually exclusive.

10. To delete a segment, select the check box next to the segment you want to delete, and then click the **Delete** button.
11. Click **Finish**.
12. In the **Desired (%)** text box, enter the weighting percentage that you want to define for each response choice.

    The weighting scheme is updated and saved automatically.

Define weighting for the Fill in the Blank question

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

You can define a weighting scheme for the **Fill in the Blank** questions with the Numbers input type only.

Procedure

1. Click the **Analyze** tab.
2. Click the **Weighting** tab in the left pane.
3. On the **Weighting** page, click the **Add Criteria** button or **Add Criteria** link in the working area.
4. In the questions selection dialog box, select the **Fill in the Blank** survey question from the list to segment the data for it.

> Hover over the question to see the tool tip with the question and its response choices.

5. Click **Next**.
6. In the range creation dialog box, click the **Add Range** button or the **Add Range** link in the working area to add a range of values for the segment.
7. Define the range of numeric values that should be covered by the segment. The ranges cannot overlap.

> You can either enter the value in the field or drag the slider.

- Enter the minimum value in the **>=** field.
- Enter the maximum value in the **<** field.

The minimum and maximum values are set to -2147483648 and 2147483647 correspondingly.

> To delete a range, click the icon. To add more ranges, click the **Add Range** button.

8. Click **Finish**. The actual number and percentage show on the **Weighting** page.
9. Enter the custom weighting percentage you want to define for each response choice in the corresponding field under **Desired** (%). Your changes are saved automatically.

Define weighting for Choose One questions grouping

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

When adding criteria to a weighting scheme for the **Choose One** questions, report authors can select two or more response choices to group. All values in the group are calculated as a cumulative total. For details on weighting functionality, see Weighting overview, page 1016.

Procedure

1 On the **Weighting** page, click the **Add Criteria** button or **Add Criteria** link in the working area.

2 In the questions selection dialog box, select the survey question from the list.

> Hover over the question to see the tool tip with the question and its response choices.

3 Click **Next**.

4 In the response choices selection dialog box, select the check boxes next to the response choices that you want to group, and then click the **Group** button.

> The **Group** button is only active if you select more than one response choice.

5 The response choices are shown as a group.

> To ungroup the response choices, select the check box next to the response choices group, and then click the **Ungroup** button.

6 Click **Finish**. The actual number and percentage are shown on the **Weighting** page.

7 Enter the custom weighting percentage you want to define for each response choice in the corresponding field under **Desired (%)**. Your changes are saved automatically.

Weighting – Role-Based Access

Navigation

Administration tab > **Roles** tab > **Roles** page.

Group administrator can control the workgroup members' access to the weighting functionality based on the user role set of permissions. You can enable weighting for a user by creating a new role or editing the existing ones on the **Roles** page. For details on weighting functionality, see Weighting overview, page 1016.

By default, weighting is available for all roles that have access to **Manage Responses**, except for the **Translator** role. The weighting permissions are only related to defining the weighting schemes. All users can view a report that has weighting applied as long as they have permissions to view the report. If the weighing criteria are defined for a survey, all users that have the right to edit the report can turn weighing on or off at the report level but they cannot define weighting criteria unless they have permissions to do it.

When copying the report that has weighting applied, the weighting scheme is copied too. However, the users copying the report cannot edit the weighting criteria but can turn the weighting on or off at the report level if they have permissions to edit the report.

So, if you do not have permission to define a weighting scheme, you can only view or use the weighting schemes defined by other users. In such case, the **Weighting** tab does not appear.

Procedure

1. **Administration** tab > **Roles** tab.
2. On the **Roles** page, click the name of the role that you want to edit.
3. On the **Edit Role** page, in the **Surveys** section, select the **Define Weighting Schemes** check box.
4. Click **Save**.

> For more details about user roles, see Roles, page 1378.

Weighting – View Count and Percent

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab > add weighting criteria.

Report authors can view the actual number and percentage for the respondents covered by the weighting criteria. In addition, they can view the number of remaining respondents. Report authors can also define the desired percentage for the respondents covered by the weighting criteria to change the response weight. For details on weighting functionality, see Weighting overview, page 1016.

When you add the weighting criteria, the actual **Count** and **Percent** of response choices are shown under **Actual**.

You can enter the custom weighting percentage that you want to define for each response choice in the corresponding **Desired (%)** text box. The calculated weight for the corresponding response choice is shown in the **Weight** column.

The desired values cannot be negative or exceed 100%.

Weighting by Completes Only

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

On the **Weighting** page, you can toggle between the two response types — **Completes Only** and **All Responses**. The **Completes Only** option is selected by default.

- **Completes Only** – Click to view complete responses only. The weighting scheme is updated and shows the counts, weights, and percentages for complete responses only.

  The response complete status is based on the response being set to complete status when the respondent takes the survey.
- **All Responses** – Click to view all responses. The weighting scheme is updated and shows the counts, weights, and percentages for all responses.

When you toggle between the response types, the **Desired (%)** values do not change.

You can also see the updates in the saved report with the weighting scheme applied.

Adding multiple questions to a weighting scheme

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab.

You can combine multiple questions into one weighting scheme. You can define multiple questions as separate criteria for the weighting scheme. Each defined question is shown in a separate column.

> For the steps on how to add weighting criteria, see Weighting overview, page 1016.

Delete questions from the weighting scheme

Procedure

1 On the **Weighting** page, click the icon next to the name of the question that you want to delete from the weighting scheme.

> Deleting the question affects the entire weighting scheme. If you delete a question from the weighting scheme, all weighting data is removed from the **Desired** and **Weight** columns.

2 In the confirmation dialog box, click **Delete**.

Apply weighting to report

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab > **Weighting** page > add weighting criteria to a survey > **Project Reports** page > create a new report or open an existing one > **Weighting** button.

You can apply previously defined weighting scheme to a report when naming the report or designing it. When you name a report, you can apply weighting to it by selecting the **Apply weighting scheme to report** check box in the **Name Your Report** dialog box.

For more details about weighting functionality, see Weighting overview, page 1016.

Additionally, you can either turn on or turn off weighting for a report during the report design process using the **Weighting** button on the toolbar in the report designer.

When you activate the weighting functionality, all report elements in the report except the Text Analytics report elements have weighting applied by default. Weighting is also applied to any new elements you add to the report. When weighting is applied, the corresponding notification shows for all report elements.

You cannot apply weighting scheme to the **Correlation** and **Response List** report elements.

Procedure

1. Create a new report or open a saved report in the report designer.
2. On the **Weighting** page, define a weighting scheme.

For more details about how to define a weighting scheme, see Weighting overview, page 1016.

3. On the toolbar, click the **Weighting** button.
4. To enable the weighting scheme for your report, in the **Weighting** dialog box, select the **On** option.
5. Click **OK**.

Apply weighting to report elements

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab > **Weighting** page > add weighting criteria to a survey > **Project Reports** page > create a new report or open an existing one.

Report authors can apply previously defined weighting scheme at the report element level. You can turn on weighting for a report element by selecting the **Display Weighted Values** check box in the **Data** properties menu.

When the weighting scheme is applied to the report element, additional check boxes appear in the **Displayed Values** properties menu. You can select the **Show Total Responses** and **Show Total Responses Weighted** check boxes to display additional values in the report element.

- **Show Total Responses** – Select this check box to display the total number of responses.
- **Show Total Responses Weighted** – Select this check box to display the total number of responses covered by weighting.

> If you export the report element that contains weighting scheme to the Adobe PDF, Microsoft Word, or Microsoft PowerPoint format, the exported report elements also contain the weighting scheme.

The selected values are shown in the report element along with the notification that the weighting scheme is applied.

> Applying weighting scheme to the report element also affects the shared reports and widgets. If you update the weighting scheme, the shared reports and widgets that contain weighting scheme are updated accordingly.

Procedure

1. On the **Project Reports** page, create a new report or open an existing one.
2. Add any report element to the report.
3. In the **Data** section, select the **Display Weighted Values** check box.

> The **Display Weighted Values** check box is only available if you have a weighting scheme defined. For details on how to define a weighting scheme, see Weighting overview, page 1016.

4. Click the **Displayed Values** menu to expand it.
5. To display the total number of responses, select the **Show Total Responses** check box.
6. To display the total number of responses covered by weighting, select the **Show Total Responses Weighted** check box.

Applying weighting manually to large datasets

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Weighting** tab > **Weighting** page > add weighting criteria to a survey > **Project Reports** page > create a new report or open an existing one.

A weighting scheme is applied automatically to the new survey responses since the weighting scheme was last applied or updated. The weighting scheme is not applied automatically to the survey responses if the number of responses exceeds 10,000 or the weighting scheme contains more than 100 rows. In these cases, the **Apply** link appears in the report designer. You can use the **Apply** link to apply the weighting scheme to the survey responses manually.

Also, weighting scheme is not automatically applied to the public reports and widgets. Public reports and widgets that contain weighting scheme are updated when you update the original report.

Procedure

1 In the report designer, click the **Apply** link.

> The **Apply** link appears for large datasets only.

2 In the **Weighting** dialog box, click **Apply**.

Chapter 23

Administration reports

Topics

Administration reports overview

Navigation

Report & Analyze tab > **Administration Reports** tab.

You can quickly generate and view information on survey activity, added users, inactive users, and response rates by invitation and survey closed date.

You can generate the following reports:

- Open Survey Activity, page 1029
- Users Added, page 1029
- Inactive Users, page 1029
- Response Rates by Invitation Sent Date, page 1029
- Response Rates by Survey Closed Date, page 1030
- Verbatim Counter report, page 1031

Open Survey Activity

The **Open Survey Activity** report shows you information about open survey events by workgroup for the last 12 months. Click the **Open Survey Activity** option to generate the report.

Users Added

The **Users Added** report shows you information about user levels by workgroup for the last 12 months. Click the **Users Added** option to generate the report.

Inactive Users

The **Inactive Users** report shows you a list of users who have not logged in to the application recently. Click the **Inactive Users** option to generate the report.

Select the date range by using the **Start Date** and **End Date** text boxes, and then click the **Report** button. The **Inactive Users** grid shows a number of columns, including:

- **Workgroup** – The name of the workgroup the user is assigned to.
- **Display Name** – The name of the user that displays in the application.
- **Email** – The user's email address.
- **Login Date** – The date when the user logged in for the last time.

Response Rates by Invitation Sent Date

The **Response Rates by Invitation Sent Date** report shows you the response rates for surveys that sent invitations within a specific date range. Click the **Response Rates by Invitation Sent Date** option to generate the report.

Select the date range by using the **Start Date** and **End Date** text boxes, and then click the **Report** button. The surveys that sent invitations within the selected date range show in the grid and in the chart.

The **Response Rates by Invitation Sent Date** grid shows a number of columns, including:

- **Survey** – The name of the survey that sent invitations.
- **Invitations** – The number of invitations sent by survey.
- **Responses** – The number of respondents who replied to the survey.
- **No Response** – The number of participants who did not reply to the survey.
- **Response Rate** – The percentage of responses for the total number of invitations.

Response Rates by Survey Closed Date

The **Response Rates by Survey Closed Date** report shows you the response rates for surveys that closed within a specific date range. Click the **Response Rates by Survey Closed Date** option to generate the report.

Select the date range using the **Start Date** and **End Date** text boxes, and then click the **Report** button. The surveys that closed within the selected date range show in the grid and in the chart.

The **Response Rates by Survey Closed Date** grid shows a number of columns, including:

- **Survey** – The name of the survey.
- **Invitations** – The number of invitations sent by survey.
- **Responses** – The number of respondents who replied to the survey.
- **No Response** – The number of participants who did not reply to the survey.
- **Response Rate** – The percentage of responses for the total number of invitations.

Verbatim Counter report

Navigation

Report & Analyze tab > **Administration Reports** tab > **Verbatim Counter** option.

The **Verbatim Counter** option is available only if you have a license for the embedded text analytics.

The **Verbatim Counter** report shows the number of verbatim credits used over the last 12 months. Click the **Verbatim Counter** option to generate the report. The report data is generated for a workgroup. The verbatim credits are counted for the embedded text analytics only.

In the **Verbatim Counter** report, the following columns are available:

- **Survey Name** – The name of the survey for which the verbatim credits were used.
- **Date** – The date when the verbatims were processed and credits were used.
- **Credits Used** – The number of used credits.

Alert & Act

Topics

Alert & Act tab overview

You can create and view triggers on the **Alert & Act** tab. You can add email, case, participant, webhook, and SMS message triggers and alerts to your survey, update profile fields, file imports, comments, Speech Analytics based on the specific responses and respondent location by using the **Alert & Act** tab. You can also send messages to any email address and create cases when a respondent submits a certain answer, a defined combination of several answers, or belongs to a specified location.

> To view the **Alert & Act** tab, you need to have the **Unified VoC** license activated for your workgroup and **Triggers** view permission enabled for your user role. To receive the needed permissions, contact **System Administrator** and **Group Administrator** correspondingly. Your triggers will still be accessible in your survey list.

To take advantage of all features within Unified Data Model triggers, you need to have the following permissions enabled:

- Case Administration > Cases > Create and View permissions
- Survey Administration > Participants > Create, View, and Edit permissions
- Panel Administration > Profiles > View and Edit permissions
- Unified VOC Configuration > Unified Data Source > View permission
- Unified VOC Configuration > Unified Data Model > View permission

Unified Data Model triggers

Navigation

Alert & Act tab > **Triggers** tab.

You can add triggers to your Unified Data Model based on the core measures, dimensions, and supplemental attributes, and delete values.

On the **Triggers** page, you can add new triggers or delete the existing ones. You can also view the following information about a trigger:

- **Name** – Name of a trigger.
- **Action** – Action type that is performed when a respondent submits a certain answer, a defined combination of several answers, or meets the specified criteria defined in the trigger.
- **Case Creation** – Notification about whether a trigger has an action selected to create a case.
- **Active** – State of a trigger. You can make it either active or inactive by switching the switch on or off.
- **Data Source(s)** - Name of a data source.

To update a trigger, click the name of the needed trigger, and the **Trigger** tab opens.

Trigger tab

Navigation

Alert & Act tab > **Triggers** tab > click the needed trigger > **Trigger** tab.

You can select the needed actions and set up criteria for a trigger.

If a Unified Data Source is inactive, the trigger is not executed.

On the **Trigger** tab, you can select the following actions for a trigger:

- **Actions** – Select the trigger action that will be performed when a respondent submits a certain answer, a defined combination of several answers, or meets the specified criteria defined in the trigger.
  - **Send Email** – Create an alert message and specify a person who receives an email when respondents match the selected criteria.
  - **Create a Case** – Define the details of the case that will be created based on the specific respondent's answer or location.

The action is available only if you have the **Case Administration** > **Cases** > **Create** and **View** permissions.

  - **Add as Participant to Survey** – Create a trigger to add participants to a survey.

The action is available only if you have the **Survey Administration** > **Participants** > **Create**, **View**, and **Edit** permissions.

  - **Update Profile Fields** – Create a trigger to update profile fields from the Unified Data Source.

The action is available only if you have the **Panel Administration** > **Profiles** > **View** and **Edit** permissions.

  - **Webhook** – Create a webhook trigger to send response information to a URL in the form of consumable JSON in a timely manner.
  - **SMS Message** – Create a trigger to send a followup SMS message with the link to another survey, comment, or other project, when a certain criteria is met (for example, a customer fills in the comment with a negative NPS score).

The action is available only if you have both the SMS license and the Unified VoC license enabled and configured.

- **Criteria** – Specify the criteria for sending a trigger.

  To add a criterion, click the **Add Another Criteria** link.

You can also specify the following expressions and values:

  - **Expression** – Select the expression from the list.
    - Equal To
    - Not Equal To

  - Contains
  - Does Not Contain
  - Begins With
  - Ends With
- **Value** – Type the needed value.
- **Save** – Click the link or anywhere else in the dialog box to save your criterion.

If you add multiple criteria, you can combine them using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The lists with parentheses and the **And / Or** operators appear next to each criterion.

In the dialog box, you can copy, move up or move down, and delete the criteria. To edit the criteria, click its name.

Triggers criteria builder

Navigation

Alert & Act tab > **Triggers** tab > click the needed trigger > **Trigger** tab > **Criteria** section.

The Criteria section allows you to set a number of criteria for your trigger.

- **Source** – Based on the source, the criteria builder menu lists the corresponding measures. The **Unified Data Set**, provides the following measures:
    - Core Measures
    - Dimensions
    - Supplemental

The **Expression** and **Value** lists options depend on the measure you select. For example, if you select the **Core Measures** > **Customer Satisfaction** measure, the following options are available:

- **Expression** – Select the expression from the drop-down list. The available options are:
    - Equal To (=)
    - Not Equal To (≠)
    - Less Than (<)
    - Greater Than (>)
    - Less Than Or Equal ()
    - Greater Than Or Equal (≥)
- **Value** – Enter or select the value depending on the selected measure. For Customer Satisfaction, the available options are numbers from 1 to 5.

To add a criterion, click the **Add Another Criteria** link.

If you add multiple criteria, you can combine them by using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The drop-down lists with parentheses and the **And/Or** operators appear next to each criterion.

You can activate or deactivate your criteria by switching the **Active** toggle on or off.

Send Email action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **Send Email** action.

For the email action, you need to define criteria for your trigger, create an alert message, and specify a person who receives an email when respondents select the specific answer or belong to a specified location.

You can edit the appearance of your message in the Design or HTML mode. The HTML option is available in the lower-left part of the dialog box.

Before you begin

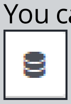
1. Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.
2. Map a field as a criteria to the Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.
3. Go to the **Triggers** tab, and then select the needed action.

Procedure

1. On the **Triggers** page, click the **New** button.
2. In the **Create New Trigger** dialog box, in the **Trigger Name** box, enter a name of the trigger, and then click **Confirm**.
3. In the **Trigger Actions** list, select the **Send Email** option.
4. Click the **Email** tab.
5. The **From** field can be configured on the **Configuration** > **Case Setup** > **Address Preferences** tab. If piping is enabled, you can provide your custom email address.
6. In the **To** field, type the email address of the person to be notified by the trigger.
7. In the **Cc** (carbon copy) and **Bcc** (blind carbon copy) fields, type the email addresses if required.

> Recipients in the **Cc** and **Bcc** fields also get the message. The names of the recipients in the **Bcc** field are not visible to other recipients.

8. In the **Subject** field, type the message short description.
9. In the message body, type the content of your email. You can customize the text by using the additional editing options from the toolbar.

> You can also pipe different fields in your message body by clicking the **Insert Piped Value** icon  on the toolbar.

10. Click **Save**. The created trigger appears on the **Trigger** tab.
11. To activate or deactivate your email trigger, on the **Email** tab, switch the toggle on or off.

Create an email trigger

Navigation

Alert & Act tab > **Triggers** tab > **Send Email** check box > **Email** tab.

For the email triggers, you need to define criteria for your triggers, create an alert message, and specify a person who receives an email when respondents select the specific answer or belong to a specified location.

You can edit the HTML of your message in the email trigger to modify the appearance of your message. The **HMTL** option is available in the lower-left part of the dialog box.

Procedure

1 Go to **Alert & Act** tab > **Triggers** tab, and select the **Send Email** check box.

2 On the **Email** tab, in the **From** text box, select the email address of the person who will notify about the trigger. By default, the email address of the person who created the trigger is selected, but you can update your address preferences by doing to the **Mail Setup** page. For more information, see Mail Setup, page 1415.

3 In the **To** text box, type the email address of the person to be notified by the trigger.

4 In the **Cc** (carbon copy) and **Bcc** (blind carbon copy) text boxes, type the email addresses if required.

> Recipients in the **Cc** and **Bcc** text boxes also get the message. The names of the recipients in the **Bcc** text box are not visible to other recipients.

5 In the **Subject** text box, type the message short description.

6 In the message body, type the content of your email. You can customize the text by using the additional editing options from the toolbar. You can also pipe different text boxes in your message using the **Insert Piped Value** icon on the toolbar.

7 Click **OK**. The created trigger appears on the **Trigger** tab.

8 To activate or deactivate a trigger, switch the toggle on or off correspondingly.

Create a Case action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **Create a Case** action.

You can create case triggers based on Unified Data Model. For the case triggers, you need to define criteria for your triggers and specify a person who receives the details of the case that is created when respondents select the specific answer.

The case triggers are available only if you have a license for the **Case Management** feature and the **Case Administration** > **Cases** permission enabled.

Before you begin

1. Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.
2. Map a field as a criteria to Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.
3. Go to the **Triggers** tab, and then select the needed action.

Procedure

1. On the **Triggers** page, click the **New** button.
2. In the **Create New Trigger** dialog box, in the **Trigger Name** text box, type a name for the trigger, and then click **Confirm**.
3. In the **Actions** list, select **Create a Case**.
4. On the **Case Details** tab, in the **Assigned to** text box, type the name of the workgroup member, to whom you want to assign the case. By default, the case is unassigned. The **Assigned to** text box is an auto-completing text box.

   You can also pipe different fields in the **Assigned to**, **Title**, **Contact's Email**, **Contact's First Name**, **Contact's Last Name**, **Contact's Phone**, and **Contact's Business** by clicking the **Insert Piped Value** icon.

5. In the **Priority** list, click the case priority.

   You can configure the **Priority** list on the **Configuration** > **Case Setup** tab.

6. In the **Title** text field, type the case summary.
7. In the **Notify Users** text field, enter the names of the persons to receive a notification that a new case is created. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an auto-completing text box.
8. In the **Case Description** text box, type the case description. You can customize the case description by using the additional editing options from the toolbar.

You can also pipe different fields in your case description by clicking the **Insert Piped Value** icon on the toolbar.

9 In the **Contact's Email** text box, type the email address of the person, who can provide the detailed information about the case.

10 In the **Contact's First Name** text box, type the first name of the contact person.

11 In the **Contact's Last Name** text box, type the last name of the contact person.

12 In the **Contact's Business** text box, type the company name of the contact person.

13 In the **Contact's Phone** text box, type the phone number of the contact person.

14 In the **Custom Properties** section, select the custom case property. The available properties are: text, date, and Choose One.

The case properties are available only if specified on the **Case Setup** tab by **Case Administrator**.

You can pipe the available properties values based on Unified Data Model by clicking the **Insert Piped Value** icon .

15 Click **Save**. The created trigger appears on the **Trigger** tab.

16 To activate or deactivate your case trigger, on the **Case Details** tab, switch the toggle on or off.

17 To view the case, go to the **Cases** tab. The case will be created if you receive a response that triggers the case.

Add as Participant to Survey action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **Add as Participant to Survey** action.

You can create an automatic trigger to add a participant to a survey to receive feedback from your users that fit certain criteria. You can add as many surveys as you need.

The action is available only if you have the **Survey Administration** > **Participants** > **Create**, **View**, and **Edit** permissions enabled.

Before you begin

1 Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.

2 Map a field as a criteria to the Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.

3 Go to the **Triggers** tab, and then select the needed action.

Procedure

1. On the **Triggers** page, click the **New** button.
2. In the **Create New Trigger** dialog box, in the **Trigger Name** text box, type a name for the trigger, and then click **Confirm**.
3. In the **Actions** list, select **Add as Participant to Survey** action.
4. On the **Add Participant** tab, click the **Add Survey** button.
5. In the **Add Survey** dialog box, select the needed survey from the list, and then click **Add**.

> Survey that are in the **Design** mode and that do not have at lease one **Contact List** campaign are not available for selection.

6. In the **Field Containing Invitation Data** column, select one of the following options:
   - Select a Channel Data Field
   - E-mail Address

   For surveys, the following data types are available: Email, Phone Number, Text. For SMS surveys – Numeric, Phone Number, Text.
7. In the **Select a Campaign** column, select the needed **Contact List** campaign.

> The **Select a Campaign** list appears in the table if more than one **Contact List** campaign is added to a survey.

8. Click **Apply**.

> If you restart the page before applying changes, the sources that you defined previously will not be saved.

Update Profile Fields action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **Update Profile Fields** action.

You can automatically update profile fields from the Unified Data Source by using the Update Profile Fields action.

> The action is available only if you have the **Panel Administration** > **Profiles** > **View** and **Edit** permissions.

Before you begin

1. Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.
2. Map a field as a criteria to the Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.
3. Go to the **Triggers** tab, and then select the needed action.

Procedure

1. On the **Triggers** page, click the **New** button.
2. In the **Create New Trigger** dialog box, in the **Trigger Name** text box, enter a name of the trigger, and then click **Confirm**.
3. In the **Trigger Actions** list, select the **Update Profile Fields** option.
4. On the **Profile Fields** tab, click the **Update Profile** link.
5. In the **Update Profile** dialog box, in the **Current Profile** menu, click the profile that you want to update.

> You can update only published profiles.

6. In the grid below, match the fields with Unified Data Model to the corresponding profile fields that you want to update, and then click **Add**. You need to match each field to a different profile field, or click **Not Selected** in the corresponding list.

> You can add multiple profiles in scope of a single trigger.

7. To save the trigger, click **Apply**. For the records that meet the defined criteria, the fields of the selected profile(s) are automatically updated with the corresponding information from the current Unified Data Set.

> If you restart the page before applying changes, the sources that you defined previously will not be saved.

8. To activate or deactivate your trigger, on the **Profile Fields** tab, switch the **Active** toggle on or off.

Send Webhook action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **Webhook** action.

You can create a webhook trigger to send response information to a URL in the form of consumable JSON in a timely manner.

Before you begin

1. Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.
2. Map a field as a criteria to Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.
3. Go to the **Triggers** tab, and then select the needed action.

Procedure

1. On the **Triggers** page, click the **New** button.
2. In the **Create New Trigger** dialog box, in the **Trigger Name** text box, type a name for the trigger, and then click **Confirm**.
3. In the **Actions** list, select **Webhook**.
4. On the **Webhook** tab, click **Add Webhook**.
5. In the **Configure Webhook** dilog box, in the **Webhook Name** text box, type the name of the webhook.
6. In the **URL** text box, type the URL to which JSON will be sent.
7. In the **Content Type** text box, the JSON format is set by default.
8. To add **Header** and **Value** pairs, click **Add HttpHeader**.
9. To generate a preview of JSON, click **Generate Content Data**.
   In the **Content Data** text box, you can view and edit the generated JSON before sending it.
10. To test a webhook, click **Send Test Request**.
11. Click **Save**.
    The created webhook trigger appears on the **Trigger** tab.
12. To view the webhook name, URL destination, or delete the webhook, go to the **Webhook** tab.
13. To save the trigger settings, click **Apply**.

Send SMS Message action

Navigation

Alert & Act tab > **Triggers** tab > select the existing trigger or create a new one > **SMS Message** action.

You can create a trigger to send a followup SMS message with the link to another survey, comment, or other project, when a certain criteria is met (for example, a user fills in the comment card with a negative NPS score).

> The action is available only if you have both the SMS license and the Unified VoC license enabled and configured.

Before you begin

1 Go to the **Unified Data Sources** tab, and add a comment, file import, survey, or Speech Analytics project as a source to Unified Data Set.

2 Map a field as a criteria to Unified Data Model and publish it to the Unified Data Set. For more information, see Map data from the Unified Data Model, page 1336.

3 Go to the **Triggers** tab, and then select the needed action.

Procedure

1 On the **Triggers** page, click the **New** button.

2 In the **Create New Trigger** dialog box, in the **Trigger Name** text box, type a name for the trigger, and then click **Confirm**.

3 In the **Actions** list, select **SMS Message**.

4 On the **SMS Message** tab, in the **To** text box, type the phone number of the person to be notified by the trigger.
To select the phone number from the list of phone type fields that are mapped in the Unified Data Source, click **Select Mobile Field**.

> You can add multiple phone numbers by clicking the **Select Mobile Field** button each time.

5 In the message body, type the content of your message. You can paste the full URL in the message body (if needed). You can customize the text by using the additional editing options on the toolbar.

6 In the **Preview** text box, you can preview the SMS text message.

7 To save the trigger settings, click **Apply**.
The created SMS trigger appears on the **Trigger** tab.

Trigger History page

Navigation

Alert & Act tab > **Trigger History** tab.

You can view a list of the most recently executed triggers in the workgroup and activity of automatic trigger actions.

On the **Trigger History** page, you can view the following values in the grid:

- **Record ID** – ID of the record for which the trigger is executed.
- **Trigger Name** – Name of a trigger.
- **Action** – Action type that is performed when the specified criteria is met in the trigger.

> For each performed trigger action, a new row in the **Trigger History** grid is created.

- **Case** – Link to a case trigger.
- **Data Source** – Source of a trigger.
- **Sent** – Time when a trigger is sent.

> Trigger history records stored in the workgroup are deleted after 90 days by default.

On the **Trigger History** page, you can export trigger history data to the .csv, .tsv, or .xlsx file formats by clicking the **Export** button > **CSV (Comma delimited)**, **TSV (Tab delimited)**, or **Microsoft Excel** option.

> You can also define the needed export file format by clicking the **Actions** menu > **Export** option > **CSV (Comma delimited)**, **TSV (Tab delimited)**, or **Microsoft Excel** option.

In the **Export Trigger History** dialog box, you can click the download link to open or save the export file locally.

To search for any related trigger information in the **Trigger History** grid, type your search query in the search text box, and then click **Search**.

Chapter 25

Feedback Intelligence

Topics

Reports – Feedback Intelligence

Navigation

Project Reports tab > **Feedback Intelligence**tab.

You can use the Feedback Intelligence product to create custom queries and reports to analyze your data for business insights and trends. For each Feedback Intelligence connection in the workgroup, a new side tab appears on the **Administration** tab. The side tab name is the display name of the Feedback Intelligence connection configured by your System Administrator. Click the side tab name to open the corresponding Business Objects InfoView web page.

You can view the **Current survey**, **Respondent Fields**, **Panelists**, **Profiles**, **Surveys**, **Respondent System Information**, and **Respondent Location** columns in Feedback Intelligence and create custom reports in Tableau or Business Objects based on this data.

> The Feedback Intelligence functionality is available if you have a license for the Feedback Intelligence feature.

System Administrator also needs to configure Feedback Intelligence, and then activate the Feedback Intelligence connection for your workgroup under **FI Connections** > **Reporting Usage**.

Feedback Intelligence – Role-Based Access

Navigation

Administration tab > **Roles**tab.

The survey administrator can control if the workgroup members can get access to the Feedback Intelligence functionality. Survey administrator can enable the Feedback Intelligence access for a user by creating a new role or editing the existing ones from the **Roles** tab on the **Administration** page.

By default, the Access Feedback Intelligence permission is enabled for **Report Viewer**, **Report Author**, **Survey Administrator**, **Survey Author**, and **Group Administrator**.

Activate the Access Feedback Intelligence functionality

Procedure

1. On the **Roles** tab, click the name of the role you want to edit.
2. On the **Edit Role** page, select the **Access Feedback Intelligence** check box in the **Experience** section at the bottom of the page.
3. Click **Save**.

Chapter 26

Importing EFM Feedback Surveys

Topics

Feedback Migration Multiple

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

You can quickly import multiple surveys at once from EFM Feedback into EFM using the "Import From Feedback" option. To easily identify the surveys you want to import, the survey details such as survey name, survey created date, most recent response date, and responses number are available for you during the import.

You can import a large number of surveys with the large response data sets from EFM Feedback into EFM. The task is running in the background without the process timeout. Additionally, you receive an email report when importing is completed.

The administrator of a workgroup can activate the functionality on importing data from EFM Feedback on the **Administration** > **General** tab by selecting the "Enable import from Feedback" check box and saving the settings. Then, the users within this workgroup can select the **Import From Feedback** option from the **New** menu on the **Surveys** tab. See images below.

After importing a survey from EFM Feedback into EFM, you cannot import any updates to this survey. You can reimport the survey from EFM Feedback to have the most recent data, but it will import into EFM as a new survey. Some advanced settings may not port properly from EFM Feedback and need to be updated manually. The features include:

- IP Address Includes or Excludes
- Custom Validation Logic
- Templates

It is recommended to review the survey for accuracy before distributing it.

Error Messages

There are two known error messages you can face when trying to import the EFM Feedback survey into EFM.

Message 1

Feedback survey format is invalid to import {0}.

Meaning:

The Feedback survey is too old to import. Feedback surveys created before a certain point in time are not in a format that can be used by the current Feedback product and thus cannot be imported into EFM. Only XML-based surveys can be imported; these are surveys created with EFM Continuum or with WebSurvey or version 4 or higher.

Message 2

Multiple Feedback translations appeared to be the same, unable to import {0}.

Meaning:

Feedback surveys have different rules for defining languages than EFM. To import a survey into EFM, you need to define a unique culture for each language. The "Languages And Messages" image below shows that English and German have the same culture (the "Description" column) and thus this survey cannot be imported.

Import surveys from EFM feedback

1. From the **New** menu, select **Import from Feedback**. The **Login to your EFM Feedback account** dialog box opens.
2. Enter your user name and password in the "User ID" and "Password" fields accordingly.
3. Click the **Options** button to expand the section.
4. Specify the link to EFM Feedback in the "URL" field.
5. Click **Login**. The following dialog box opens.
6. Select the check boxes next to the EFM Feedback surveys you want to import into EFM.

> Click the "Select all "n" entries in this grid" link to select all surveys.

7. Click **Next**.

> You can edit the survey name and description during the import process if you import a single survey.

8. Click **Import**. The survey import may take some time. When importing is completed, you can view the number of imported records and the number of records that failed to import.
9. Click **Close**. The imported surveys appear on the **My Surveys** page in EFM.

EFM Feedback – Importing Multiple Surveys

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

You can quickly import multiple surveys at once from EFM Feedback into EFM using the **Import From Feedback** option. To easily identify the surveys you want to import, the survey details such as survey name, survey created date, most recent response date, and responses number are available for you during the import.

You can import a large number of surveys with the large response data sets from EFM Feedback into EFM. The task is running in the background without the process timeout. Additionally, you receive an email report when importing is completed.

The administrator of a workgroup can activate the functionality on importing data from EFM Feedback on the **Administration** > **General Setup** tab by selecting the "Enable import from Feedback" check box and saving the settings. Then, the users within this workgroup can select the **Import From Feedback** option from the **New** menu on the **Surveys** tab.

After importing a survey from EFM Feedback into EFM, you cannot import any updates to this survey. You can reimport the survey from EFM Feedback to have the most recent data, but it will import into EFM as a new survey. Some advanced settings may not port properly from EFM Feedback and need to be updated manually. The features include:

- IP Address Includes or Excludes
- Custom Validation Logic
- Templates

It is recommended to review the survey for accuracy before distributing it.

Error Messages

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Message 2

Multiple Feedback translations appeared to be the same, unable to import {0}.

Meaning:

Feedback surveys have different rules for defining languages than EFM. To import a survey into EFM, you need to define a unique culture for each language. The "Languages And Messages" image below shows that English and German have the same culture (the "Description" column) and thus this survey cannot be imported.

Import surveys from EFM Feedback

Procedure

1 From the **New** menu, select **Import from Feedback**. The **Login to your EFM Feedback account** dialog box opens.

2 Enter your user name and password in the "User ID" and "Password" fields accordingly.

3 Click the **Options** button to expand the section.

4 Specify the link to EFM Feedback in the "URL" field.

5 Click **Login**. The following dialog box opens.

6 Select the check boxes next to the EFM Feedback surveys you want to import into EFM.

> Click the "Select all "n" entries in this grid" link to select all surveys

7 Click **Next**.

> You can edit the survey name and description during the import process if you import a single survey.

8 Click **Import**. The survey import may take some time. When importing is completed, you can view the number of imported records and the number of records that failed to import.

9 Click **Close**. The imported surveys appear on the **My Surveys** page in EFM.

EFM Feedback – Importing Surveys with Branching

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

You can smoothly import surveys with branching logic from EFM Feedback into EFM. Both the simple and conditional branching set in EFM Feedback is supported in EFM.

In EFM Feedback, the following four actions are associated with branching:

- Jump to the next question
- Jump to a specific question (drop-down list to select a question)
- Jump to a web address (text box to specify the URL)
- Submit survey now

The following logic is applied to these actions in EFM:

- **Jump to the next question** works as a simple page break.
- **Jump to a specific question** redirects survey participants to the destination question.
- **Jump to a web address** creates a new custom end page and redirects survey participants to the specified URL.
- **Submit survey now** redirects survey participants to the survey end page.

All branches from EFM Feedback are ported into the branches of EFM. See image and explanation below.

- **Description** – Contains all criteria descriptions from EFM Feedback separated by the And/Or operator.
- **Destination** – Contains the question number or end page name defined by branching in EFM Feedback.
- **Check Point** – Contains the question number where the logic rule is applied.
- **Criteria** – Contains a list of all criteria from EFM Feedback.

Criteria for the following EFM Feedback question types are imported into EFM:

- All Choose One
- Choose All That Apply
- Fill In The Blank
- Essay
- Numeric Value
- Date Value
- Choose One Matrix
- Choose All That Apply Matrix
- Side-By-Side Matrix
- Rank Order
- Hidden Field
- Data Block (with the question types from the list)

For the steps on importing a survey from EFM Feedback into EFM, Feedback Migration Multiple, page 1051

EFM Feedback – Importing Surveys with Translations

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

You can import surveys with translations from EFM Feedback into EFM. When you import a survey, each translation is assigned the language and culture code in EFM, for example, English (India). The following logic is used to map the translation languages:

- If culture is defined in EFM Feedback, the corresponding culture is set in EFM.
- If encoding is defined in EFM Feedback, the corresponding culture is set in EFM.
- If there is no culture or encoding defined in EFM Feedback, the default culture is set in EFM.

The survey is not imported into EFM, if it has at least two translations with the same language and culture code. After importing, you can view a list of surveys that fail to import. If you import multiple surveys, you can view the import details in an email report.

To import such survey, you need to change the culture code in EFM Feedback so that you do not have two similar translations. Make the changes and import your survey again.

For the steps on importing a survey from EFM Feedback into EFM,EFM Feedback – Importing Multiple Surveys, page 1053.

EFM Feedback – Text Formatting Import

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

When you import surveys from EFM Feedback into EFM, all text formatting is ported too. The formatting options include:

- Font Name
- Font Size
- Bold
- Italic
- Underline
- Foreground Color
- Background Color

You can preview your survey after import to check whether all text has the correct formatting applied.

For the steps on importing a survey from EFM Feedback into EFM, Import surveys from EFM feedback, page 1052.

EFM Feedback – "Choose One" Caption Import

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

When you import surveys from EFM Feedback into EFM, the "Choose One (Pull Down Menu)" questions are ported with the "Choose One" caption. The "Choose One" caption is ported for the "Choose One Matrix" questions too.

When you select the "Insert "Choose One" into first item of pull down lists" check box in the EFM Feedback, the "Choose One" caption appears in the drop-down list by default. This caption is the default text that your survey participants see when they answer the survey.

Surveys imported from EFM Feedback with this check box selected have an additional value in the "Caption" drop-down list in EFM. You can change the caption at the following location:

- In the "Multiple Choice: Choose One" question, you can change the caption in the **Appearance** section.
- In the "Matrix" question with the "Multiple Choice: Choose One" side, you can change the caption in the **Side #** section under **Advanced Options**.

Select the "Drop-down Box" layout to view the "Caption" feature.

The available options are "None," "Click here to choose," "Click here for choices," and "Choose One."

For the steps on importing the surveys from EFM Feedback into EFM, Import surveys from EFM feedback, page 1052.

EFM Feedback – Auto-Import Unique ID

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > **New** menu > **Import from Feedback**.

You can import the unique ID from an EFM Feedback survey into EFM automatically. When importing a survey from Feedback, the "Fill in the Blank" hidden system question is created storing the following participant data:

- Unique ID
- Response ID
- IP Address, and
- Language

This functionality is available for all the email-based surveys. The **Generate Link** surveys are not included.

If the unique participant ID is used in the EFM Feedback survey, it is automatically imported along with the other survey data into EFM. The unique ID is displayed in the "System (QSYSTEM_1)" column and in the Responses dialog box on the **Response Manager** page. See images below.

Synchronization of WFO and EFM

Topics

Import WFO organizations and users

Navigation

Administration tab > **Users** tab > **Actions** menu > **Import from WFO** option.

You can import organizations and users from the WFO source into the EFM application without setting up the same organization structure across both products. You can import the whole WFO hierarchical structure of organizations and users or select particular users and organizations. During import, the organizations and users are identified by their emails.

> This functionality is available only for Group and Survey Administrator.

Before you begin

- To verify if the **Enable WFO Organization Synchronization** check box is selected for your workgroup, contact your System Administrator.

Procedure

1. On the **Administration** tab, click the **Users** tab.
2. In the **Actions** menu, click **Import from WFO** option.
3. On the **Import Organizations and Users from WFO** page, in the **WFO** section, expand the **WFO Structure** tree view.
4. Select the organizations and users that you want to import into the EFM application.
5. To move the organizations and users to your EFM organization, click the right arrow button, and then click **Import**.

> Users without email, first name, and last name, users that were previously imported, and organizations with the same name as in the EFM application are not imported. To view import details, click **Administration** tab > **System Tasks** tab > **Import WFO Organizations** link.

After import is completed, the WFO users imported into the EFM application receive the email message with the link to activate their accounts in the EFM application.

> To view your WFO hierarchical structure, go to **Administration** tab > **Users** tab > expand the **WFO Structure** tree view.

Besides, after import, the following external data source keys automatically appear on the **External Sources** side tab:

- **WFO Organization**
- **WFO User**

You cannot delete or set as default the **WFO Organization** or **WFO User** external data source key.

> To view the details about **WFO Organization** or **WFO User** external data source key, go to the **Edit Organization** or **Edit User** dialog box.

If you import the WFO user from some other file, you receive one of the following results:

- A user who already exists in the EFM application cannot be imported.
- A user who does not exist in the EFM application becomes the EFM user.

> You can import the WFO organization only from the WFO source. If the organization with the same name already exists in the EFM application, it is not imported.

Mapping WFO roles to EFM roles

Navigation

Administration tab > **Users** tab > **Actions** menu > **Import from WFO** option.

When importing WFO organizations and users, the WFO roles are automatically changed to the corresponding roles in the EFM application:

- Admin to Administrator
- Manager to Survey Administrator
- Supervisor to Survey Administrator
- Analyst to Report Author
- Agent to Report Viewer
- The user with custom role to Report Viewer
- The user with no role to Report Viewer
- The user with multiple roles to the highest of the role

If the user's EFM role does not correspond to the user's WFO role, you can change the role in the **Edit User** dialog box.

For more information about changing the user role, see Users, page 1349.

If System Administrator changes the user role in the **Edit User** dialog box, this role is not mapped again to the WFO role automatically when updating.

Update the WFO hierarchical structure

Navigation

Administration tab > **Users** tab > **Actions** menu > **Import from WFO** option.

After importing WFO organizations and users, you can update your WFO hierarchical structure by adding or deleting WFO organizations and users. During update, the users and organizations are identified by their IDs.

Procedure

1. Log in to the EFM application as a Survey or Group Administrator.
2. On the **Administration** tab, click the **Users** tab.
3. In the **Actions** menu, click **Import from WFO**.
4. On the **Import Organizations and Users from WFO** page, in the **WFO** section, expand the **WFO Structure** tree view.
5. Select or clear the needed organizations and users, and then click the needed arrow button.
6. Click **Update**.

> To view the updated WFO hierarchical structure, go to **Administration** tab > **Users** tab > WFO icon .

Restrictions on WFO organizations and users

Navigation

Administration tab > **Users** tab > **WFO** icon > **Users** or **Organizations** button > click the needed user or organization.

You can manage WFO organizations and users according to the defined permissions. These permissions are almost the same as for EFM organizations and users, except for the following restrictions:

- Deleting WFO organizations and users
- Moving EFM organizations and users or new organizations and users to the WFO hierarchical structure
- Adding a child organization or user to the WFO organization
- Editing the name and external data source ID of the WFO organization
- Changing the user name, display name, email address, organization membership, status, and external data source IDs of the WFO user
- Assigning membership for the WFO user

For more information about permissions for managing EFM organizations and users, see Users, page 1349.

> To view or edit the details about a user, click the **Administration** tab > **Users** tab > **WFO** icon > **Users** button > click the needed user.To view the organization details, click the **Administration** tab > **Users** tab > **WFO** icon > **Organizations** button > click the needed organization.

Recurrence of WFO and EFM synchronization

Navigation

Administration tab > **Users** tab > **WFO** icon > **Users** or **Organizations** button > click the needed user or organization.

After you import WFO organizations and users, you can update them according to the WFO source by setting a synchronization recurrence.

> To set the recurrence of the EFM application and the WFO source synchronization, contact your System Administrator.

If the recurrence is set, after synchronization, all changes in the WFO source are imported into the EFM application except for the following:

- If a user in the WFO source is moved to an organization that exists in the EFM application, such user is moved from the current organization in the EFM application to the new organization.
- If a user in the WFO source is moved to an organization that is not imported into the EFM application, such user is deleted from the EFM application.

> To disable synchronization, contact your System Administrator. For more information, see Disabling WFO and EFM synchronization, page 1072.

Importing or activating existing users

Navigation

Administration tab > **Users** tab > **Actions** menu > **Import from WFO** option.

You can import the WFO users who already exist in the EFM application. Such users are imported according to the initial import or update procedure:

- To the WFO structure
- With editing restrictions applied to them
- With the **WFO source** indicated in the **Source** column

The following are special cases when importing users who already exist in the EFM application:

- Users with their first name, last name, or user name changed in the WFO source are imported and updated according to the changes in the WFO source.
- Deleted or suspended users are imported and become active.
- User roles assigned in the EFM application are not changed for existing users during import.

Existing users will not be imported or activated in the following cases:

- If users are assigned to multiple workgroups or to another workgroup.
- If user names are used by other users (except the user names which email addresses are the same in the WFO source and the EFM application).

Export WFO users

Navigation

Administration tab > **Users** tab > **Organizations** > **Actions** menu.

You can export the WFO users to the .csv, .tsv, or .xlsx file formats.

Procedure

1. Log in to the EFM application as a Survey or Group Administrator.
2. On the **Administration** tab, click the **Users** tab.
3. Click **Users**, and then in the **Actions** menu, click **Export**.
4. Select the type of export, and then in the **Export Users** dialog box, click the link to download and view the exported file.

In the **Source** column of the exported file, you can view if the user is exported from the WFO or EFM source.

Export WFO organizations

Navigation

Administration tab > **Users** tab > **Organizations** > **Actions** menu.

You can export the WFO organizations to the .csv, .tsv, or .xlsx file formats.

Procedure

1. Log in to the EFM application as a Survey or Group Administrator.
2. On the **Administration** tab, click the **Users** tab.
3. Click **Organizations**, and then in the **Actions** menu, click **Export**.
4. Select the type of export, and then in the **Export Organizations** dialog box, select the needed organizations.
5. In the **Export Organizations** dialog box, click the link to download and view the exported file.

In the **Source** column of the exported file, you can view if the organization is exported from the WFO or EFM source.

Adding WFO users to Feedback Intelligence

Navigation

Administration tab > **Users** tab > **Actions** menu > **Import from WFO** option.

If you import users from the WFO source into the EFM application, they are automatically added to Feedback Intelligence and can use Business Objects and Tableau functionalities.

You can view the details of the **Manage FI users for a workgroup** task on the **Tasks** tab.

> The WFO users are added to Feedback Intelligence automatically if WFO synchronization and Feedback Intelligence are enabled and configured in the EFM application.

When WFO users are created in Feedback Intelligence, **Groups** link (**EFM** > **Administration** > **Users**) is enabled and these users can be added to Feedback Intelligence groups.

If the WFO user role is changed in the EFM application to a new one that does not have **Access Feedback Intelligence** or **Access Tableau** permission enabled, this user is removed from Tableau Server and disabled in Business Objects correspondingly.

If the existing WFO user role is changed in the EFM application to a new one that has **Access Feedback Intelligence** or **Access Tableau** permission enabled, this user is added to Tableau Server and Business Objects correspondingly.

> If a WFO user is deleted during the synchronization, the user's account is removed from the Business Objects and Tableau. If the WFO user's email is changed during the synchronization, the user still has access to Tableau and Business Objects by using the existing user name and account name.

Disabling WFO and EFM synchronization

The process of updating WFO organizations and users according to the WFO source can be stopped by disabling synchronization with the EFM application.

> To disable synchronization of the EFM application with the WFO source, contact your System Administrator.

Disabling the WFO and EFM synchronization causes the following:

- Updating of the WFO users and organizations stops.
- Users and organizations imported from the WFO source remain the WFO users and organizations.

Deactivate the WFO source

Navigation

Administration tab > **External Sources** tab.

You can deactivate synchronization of WFO organizations and users with the EFM application.

Deactivating the WFO and EFM synchronization causes the following:

1. Updating of the WFO organizations and users stops.
2. Organizations and users imported from the WFO source become EFM organizations and users.

Procedure

1. Log in to the EFM application as a Survey or Group Administrator.
2. Click the **Administration** tab, and then click the **External Sources** side tab.
3. Select the **WFO** check box, and then click **Deactivate**.
4. In the confirmation message, click **Disable**.

Chapter 28

Integration with OpinionLab

Topics

Managing comments

Navigation

Data Sources tab > **Comments** tab

On the **Comments** tab, you can perform the following actions:

- View and export comments
  - Add comments to reports
  - Create reports based on comments
  - Enrich/Tire comments to data channels
  - Add comments to data sets
  - Add report elements with comments to dashboards

For more information on adding comments to dashboards, see Adding report elements to dashboard, page 89 and Create advanced dashboard, page 66

Export comments to the .csv, .tsv, or .xlsx file formats

Navigation

Data Sources tab > **Comments tab** > click the needed project link > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can export comments to the .csv, .tsv, or .xlsx file formats to save them locally.

Procedure

1. On the **Response Manager** page, in the **Export** menu, click the needed file format for export:
   - CSV (Comma delimited)
   - TSV (Tab delimited)
   - Microsoft Excel

   The **Export Responses** dialog box appears.
2. In the **Columns** section, select the needed option:
   - **Displayed Data** – Only data available on the **Responses Manager** page is exported.
   - **All Response Data from the Current Project** – All response data from the current project is exported.
3. In the **Filter** section, define if any filter is applied to the exported data:
   - **No Filter** – The exported file uses no filters.
   - **Current Filter** – The current filter is applied to the exported response data.
4. Click **Next**, and in the **Export Responses** dialog box, click the link to download the exported file.

Export comments to the .spss file format

Navigation

Data Sources tab > **Comments** tab > click the needed project link > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can export comments to the .spss file format to save them locally.

Procedure

1. On the **Response Manager** page, in the **Export** menu, click the **SPSS** option.

   The **Export Responses** dialog box appears.

2. In the **Columns** section, select the needed data export option:
   - **Displayed Data** – Only data available on the **Responses Manager** page is exported.
   - **All Response Data from the Current Project** – All response data from the current project is exported.

3. In the **Filter** section, define if any filter is applied to the exported data:
   - **No Filter** – The exported file uses no filters.
   - **Current Filter** – The current filter is applied to the exported response data.

4. To define the missing value for not asked questions, select the **Define Missing Value for Not Asked Questions** check box and enter the whole number for missing value into the text box.

> By default, this option is not active. The system value appears in the export file when the option is not active.

5. In the **Export Responses** dialog box, click the link to download and view the exported file.

Schedule export of comments by email

Navigation

Data Sources tab > **Comments tab** > click the needed project link > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of comment in the .csv, .tsv, .xlsx, or.spss file formats by email.

> The file exported is zipped and attached to the email message.

Procedure

1 On the **Response Manager** page, in the **Schedule Export** menu, click **Email**.

2 On the **Schedule Export Delivery Page**, in the **Select Format** menu, click the format of the exported file:

- CSV (Comma delimited)
- TSV (Tab delimited)
- Microsoft Excel
- SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the **Select Format** menu, and then select the appropriate options.

3 In the **To** text box, type the email address of the needed recipients.

> If there are organizations in a workgroup, click the **To** button to select the recipients. In the **Survey Responses Recipients** dialog box, select a check box next to the user or organization, click the right arrow button to add them to the **Recipients**, and then click **OK**.

4 In the **From** text box, type the sender's email address.
By default, your email address is selected.

5 In the **Subject** text box, type the title of the email message.
By default, the title of the email message is **Responses for <survey name>**.

6 In the email message body, type the needed text and customize it by using the editing toolbar.

> To preview the email message, click the **Preview** button. You can also test the email message by clicking the **Send Test Email** button and then entering the needed email address.

7 In the **Delivery Schedule** section, define the schedule of comment export:

- **No Scheduling** – Select to send your message later
- **Send Now** – Select to end your message immediately
- **Send at a specific date and time** – Specify a date and time when you want to deliver your email message

To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Schedule export of comments to Folder

Navigation

Data Sources tab > **Comments** tab > click the needed project link > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of comment in the .csv, .tsv, .xlsx, or .spss file formats to the EFM local folder, which is located in {EFMInstall}\AppData\{groupID}\Responses\ {projectID}.

Procedure

1 On the **Response Manager** page, in the **Schedule Export** menu, click **Folder**.

2 On the **Schedule Export Delivery** Page, in the **Select Format** menu, select the format of the exported file:

- CSV (Comma delimited)
- TSV (Tab delimited)
- Microsoft Excel
- SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the Select Format menu, and then select the appropriate options.

3 In the **Delivery Schedule** section, define the schedule of comment export:

- **No Scheduling** – Select to send a file later.
- **Export Now** – Select to export a file immediately.
- **Send at a specific date and time** – Specify a date and time when you want to export a file.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Schedule export of comments to SFTP

Navigation

Data Sources tab > **Comments** tab > click the needed project link > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of comment in the .csv, .tsv, .xlsx, or .spss file formats to the Secure File Transfer Protocol (SFTP) to access, transfer, and manage the comments.

Procedure

1 On the **Responses** tab, in the **Schedule Export** list, click **SFTP**.

2 On the **Schedule Export Delivery Page**, in the **Select Format** menu, select the format of the exported file:
   - CSV (Comma delimited)
   - TSV (Tab delimited)
   - Microsoft Excel
   - SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the **Select Format** menu, and then select the appropriate options.

3 In the **SFTP Settings** section, enter the needed text into the following text boxes:
   - **Server name** – Name of a server where SFTP is located and where you want to export the file to.
   - **Port** – Number of a port for the specified server.
   - **Path** – Location on a server to which you want to export the file.
   - **User Name** – User name for the specified server.
   - **Password** – Password for the specified server.

> To test connection, click the **Test Settings** button.

4 In the **Delivery Schedule** section, define the schedule of comment export:
   - **No Scheduling** – Select to send a file later.
   - **Export Now** – Export a file immediately.
   - **Export at a specific date and time** – Specify a date and time when you want to export a file.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Share a comment

Navigation

Data Sources tab > **Comments** tab > **Actions** menu > **Share** button.

You can share your comment which provides other users or organizations access to your comments.

The following sharing options are available:

- **View Access** – You can only view the shared comment.
- **Full Access** – You can view and edit the shared comment.

You can also share multiple comments. When multiple comments are selected, you can only add Authors or Viewers. To view who has access to multiple comments, open an individual comment. You can remove Authors or Viewers (if needed).

You can share comments only if the comments sharing permission is activated for your user role.

Procedure

1. Go to the **Data Sources** tab, and then select the **Comments** tab.
2. On the **OpinionLab Comments** page, select the check boxes next to the comment that you want to share.
3. On the toolbar, on the **Actions** menu, click **Share**.
4. In the **Share Access** dialog box, select a check box next to the user or organization, and then click the right arrow button to move it to the **View Access** or **Full Access** box.
5. To send an email notification to the user or organization that have the view or full access to the comment, select the **Notify Users by Email** check box.

   The check box is selected by default.
6. Click **OK**.
7. In the **Notify Users** dialog box, edit the email notification, and then click **OK**.

The **Notify Users** dialog box opens only when the **Notify Users by Email** check box is selected.

Change a comment owner

Navigation

Data Sources tab > **Comments** tab > **Actions** menu > **Change Owner** button.

You as a group administrator can reassign the comments to a new owner.
When the comment owner is changed, the corresponding email notification is sent.

Procedure

1. Go to the **Data Sources** tab, and then select the **Comments** tab.
2. On the **OpinionLab Comments** page, select the check boxes next to the comment that you want to reassign.
3. On the toolbar, on the **Actions** menu, click **Change Owner**.
4. In the **Bulk Assign Comment Projects to New Owner** dialog box, select the user who will be a new owner.

> The current comments owner is outlined in gray.

5. Click **OK**.

Push a comment to Feedback Intelligence

Navigation

Data Sources tab > **Comments** tab > **Actions** menu > **Push comments to FI** button.

Before you begin

- Publish the needed comment.

> Comment in the **Design** mode is not available for publishing.

- Contact a System Administrator to add the comment to Feedback Intelligence. A System Administrator can also enable and disable the **Push to Feedback Intelligence** option for a certain comment.

> When you update the existing comment in Feedback Intelligence, changes that you made to the comment may affect the previously generated Feedback Intelligence universe and Tableau data source, which may change or damage the existing reports. If you have reports based on this comment, it is recommended that you discuss your comment changes with a support manager before submitting this update.

Procedure

1. On the **Comments** page, select the comment that you want to update in Feedback Intelligence.
2. On the **Actions** menu, click the **Push to Feedback Intelligence** option.
3. In the confirmation dialog box, click **OK**.
   Your comment is marked to be updated in Feedback Intelligence.

Integration with ForeSee

Integration of ForeSee and EFM is the process of importing ForeSee projects into the EFM application. This feature allows you to view and export ForeSee projects, add them to reports, create reports based on these projects, add ForeSee projects to data sets and Unified VoC, add report elements with ForeSee projects to dashboards, and share them with other users.

Topics

ForeSee page overview

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page.

You can view information about the existing ForeSee projects, open, rename, and delete them.

> The **ForeSee** page is available if the System Administrator activates the **ForeSee** Integration license for your workgroup and only if you have the **View** permission.

Before you begin

- To verify if the **Enable ForeSee Iintegration**check box is selected for your workgroup, contact your System Administrator.

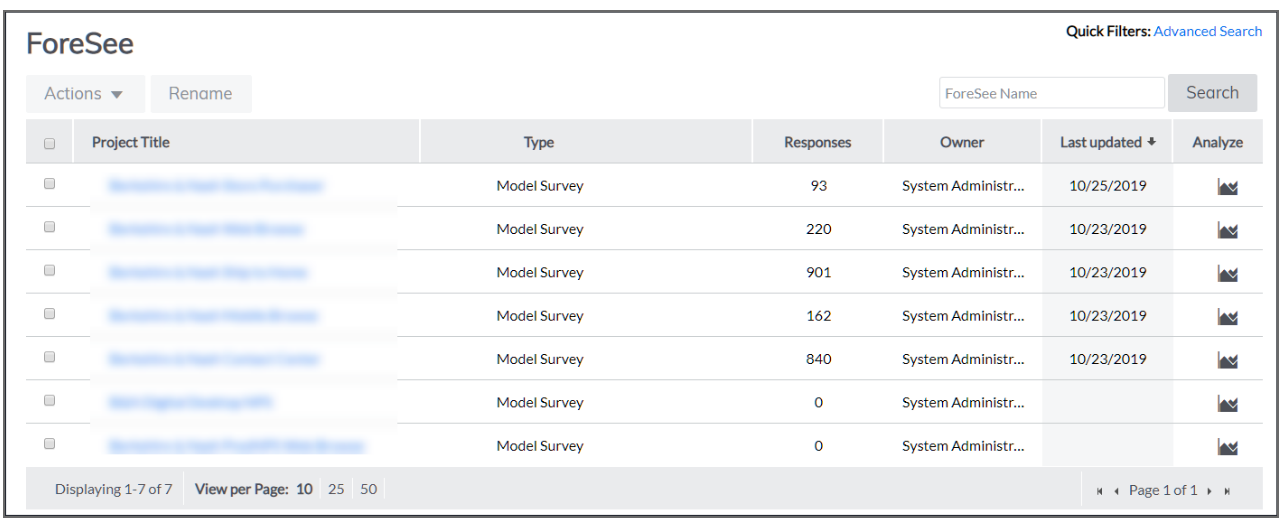
When you import a ForeSee project, the appropriate task is created on the System Task page.

On the **ForeSee** page, the following columns are available:

- **Project Title** – Name of a ForeSee project which is displayed as a link.
- **Type** – Type of the ForeSee project.

> For now, only responses from the Model Surveys are supported for the further analysis.

- **Responses** – Amount of responses for the ForeSee project.
- **Owner** – The user to whom the ForeSee project belongs.
- **Last updated** – The last time when the ForeSee project was changed.
- **Analyze** – Icon that redirects you to the **Analyze** tab of the ForeSee project when clicking it.



The ForeSee page

When you click the project title link or **Analyze**  icon, you will be redirected to the **Analyze** tab of the ForeSee project.

On the **Actions** menu, the following options are available:

- **Rename** – Click to rename the ForeSee project. To make this option available, select the check box next to the ForeSee project that you want to rename.
- **Share** – Click to share your ForeSee project with other users. You can select which users can view the ForeSee project, change the ForeSee project name, and notify users by email that the ForeSee project is available to view.
- **Change Owner** – Click to change the owner of ForeSee project.

In the **ForeSee** grid, you can sort your projects by the **Project Title**, **Type**, **Responses**, **Owner**, or **Last updated**.

By default, the **ForeSee** grid shows the first 10 projects. To view more saved projects, use the **View per Page** option. Select the **25**, **50**, or **100** link to display more projects. To navigate between the pages, click the navigation arrows in the lower right corner. The **Displaying # of #** option shows the number of current columns among the total number of them

Share a ForeSee project

Navigation

Data Sources tab > **ForeSee** tab > **Actions** menu > **Share** option.

You can share your ForeSee project which provides other users or organizations access to your ForeSee projects.

The following sharing options are available:

- **View Access** – You can only view the shared ForeSee project.
- **Full Access** – You can view and edit the shared comment.

You can also share multiple ForeSee projects. When multiple ForeSee projects are selected, you can only add Authors or Viewers. To view who has access to multiple projects, open an individual project. You can remove Authors or Viewers (if needed).

> You can share ForeSee projects only if the ForeSee projects sharing permission is activated for your user role.

Procedure

1. Go to the **Data Sources** tab, and then select the **ForeSee** tab.
2. On the **ForeSee** page, select the check boxes next to the project that you want to share.
3. On the toolbar, on the **Actions** menu, click **Share**.
4. In the **Share Access** dialog box, select a check box next to the user or organization, and then click the right arrow button to move it to the **View Access** or **Full Access** box.
5. To send an email notification to the user or organization that has the view or full access to the comment, select the **Notify Users by Email** check box.

   The check box is selected by default.
6. Click **OK**.
7. In the **Notify Users** dialog box, edit the email notification, and then click **OK**.

> The **Notify Users** dialog box opens only when the **Notify Users by Email** check box is selected.

Change a ForeSee project owner

Navigation

Data Sources tab > **ForeSee** tab > **Actions** menu > **Change Owner** option.

You as a group administrator can reassign the ForeSee projects to a new owner.
When the project owner is changed, the corresponding email notification is sent.

Procedure

1. Go to the **Data Sources** tab, and then select the **ForeSee** tab.
2. On the **ForeSee** page, select the check boxes next to the comment that you want to reassign.
3. On the toolbar, on the **Actions** menu, click **Change Owner**.
4. In the **Bulk Assign ForeSee Projects to New Owner** dialog box, select the user who will be a new owner.

> The current project owner appears dimmed.

5. Click **OK**.

Export ForeSee projects to the .csv .tsv, or .xlsx file formats

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page > click the needed project link or Analyze icon next to the needed project > **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can export ForeSee projects to the .csv, .tsv, or .xlsx file formats to save them locally.

Procedure

1. On the **Response Manager** page, in the **Export** menu, click the needed file format for export:
   - CSV (Comma delimited)
   - TSV (Tab delimited)
   - Microsoft Excel
2. In the **Export Responses** dialog box, in the **Columns** section, select the needed option:
   - **Displayed Data** – Only data available on the **Responses Manager** page is exported.
   - **All Response Data from the Current Project** – All response data from the current project is exported.
3. In the **Filter** section, define if any filter is applied to the exported data:
   - **No Filter** – The exported file uses no filters.
   - **Current Filter** – The current filter is applied to the exported response data.
4. Click **Next**, and in the **Export Responses** dialog box, click the link to download the exported file.

Export ForeSee project to the .spss file format

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page > click the needed project link or Analyze icon next to the needed project > **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can export ForeSee projects to the .spss file format to save them locally.

Procedure

1. On the **Response Manager** page, in the **Export** menu, click the **SPSS** option.
2. In the **Export Responses** dialog box, in the **Columns** section, select the needed data export option:
   - **Displayed Data** – Only data available on the **Responses Manager** page is exported.
   - **All Response Data from the Current Project** – All response data from the current project is exported.
3. In the **Filter** section, define if any filter is applied to the exported data:
   - **No Filter** – The exported file uses no filters.
   - **Current Filter** – The current filter is applied to the exported response data.
4. To define the missing value for not asked questions, select the **Define Missing Value for Not Asked Questions** check box and enter the whole number for missing value into the text box.

> By default, this option is not active. The system value appears in the export file when the option is not active.

5. In the **Export Responses** dialog box, click the link to download and view the exported file.

Schedule export of ForeSee projects by email

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page > click the needed project link or Analyze icon next to the needed project > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of ForeSee projectin the .csv, .tsv, .xlsx, or.spss file formats by email.

> The file exported is zipped and attached to the email message.

Procedure

1. On the **Response Manager** page, in the **Schedule Export** menu, click **Email**.
2. On the **Schedule Export Delivery Page**, in the **Select Format** menu, click the format of the exported file:
   - CSV (Comma delimited)
   - TSV (Tab delimited)
   - Microsoft Excel
   - SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the **Select Format** menu, and then select the appropriate options.

3. In the **To** text box, type the email address of the needed recipients.

> If there are organizations in a workgroup, click the **To** button to select the recipients. In the **Survey Responses Recipients** dialog box, select a check box next to the user or organization, click the right arrow button to add them to the **Recipients**, and then click **OK**.

4. In the **From** text box, type the sender's email address.
   By default, your email address is selected.
5. In the **Subject** text box, type the title of the email message.
   By default, the title of the email message is **Responses for <survey name>**.
6. In the email message body, type the needed text and customize it by using the editing toolbar.

> To preview the email message, click the **Preview** button. You can also test the email message by clicking the **Send Test Email** button and then entering the needed email address.

7. In the **Delivery Schedule** section, define the schedule of comment export:
   - **No Scheduling** – Select to send your message later
   - **Send Now** – Select to end your message immediately
   - **Send at a specific date and time** – Specify a date and time when you want to deliver your email message

To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Schedule export of ForeSee projects to SFTP

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page > click the needed project link or Analyze icon next to the needed project > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of ForeSee project in the .csv, .tsv, .xlsx, or .spss file formats to the Secure File Transfer Protocol (SFTP) to access, transfer, and manage the ForeSee projects.

Procedure

1. On the **Responses** tab, in the **Schedule Export** list, click **SFTP**.
2. On the **Schedule Export Delivery Page**, in the **Select Format** menu, select the format of the exported file:
   - CSV (Comma delimited)
   - TSV (Tab delimited)
   - Microsoft Excel
   - SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the **Select Format** menu, and then select the appropriate options.

3. In the **SFTP Settings** section, enter the needed text into the following text boxes:
   - **Server name** – Name of a server where SFTP is located and where you want to export the file to.
   - **Port** – Number of a port for the specified server.
   - **Path** – Location on a server to which you want to export the file.
   - **User Name** – User name for the specified server.
   - **Password** – Password for the specified server.

> To test connection, click the **Test Settings** button.

4. In the **Delivery Schedule** section, define the schedule of comment export:
   - **No Scheduling** – Select to send a file later.
   - **Export Now** – Export a file immediately.
   - **Export at a specific date and time** – Specify a date and time when you want to export a file.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Schedule export of ForeSee projects to Folder

Navigation

Data Sources tab > **ForeSee** tab > **ForeSee** page > click the needed project link or Analyze icon next to the needed project > click **View Standard Report**, **Design from Scratch**, or **View Responses** > **Responses Manager** page.

You can schedule export of ForeSee project in the .csv, .tsv, .xlsx, or .spss file formats to the EFM local folder, which is located in {EFMInstall}\AppData\{groupID}\Responses\ {projectID}.

Procedure

1 On the **Response Manager** page, in the **Schedule Export** menu, click **Folder**.

2 On the **Schedule Export Delivery** Page, in the **Select Format** menu, select the format of the exported file:

- CSV (Comma delimited)
- TSV (Tab delimited)
- Microsoft Excel
- SPSS

> To specify the formatting options for the scheduled export, click the **Export Options** link next to the Select Format menu, and then select the appropriate options.

3 In the **Delivery Schedule** section, define the schedule of comment export:

- **No Scheduling** – Select to send a file later.
- **Export Now** – Select to export a file immediately.
- **Send at a specific date and time** – Specify a date and time when you want to export a file.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set the end date or select **No End Date**.

Chapter 30

Tableau

Topics

Integration with Tableau

Tableau is a third-party tool for creating and using advanced reports, data visualizations, dashboards, and data analysis. Depending on the Tableau product that you are using, you can track and manage your EFM data in two ways:

- If you have your own license for Tableau products, you can manage data via Tableau Web Data Connector (WDC) by importing the EFM survey responses into Tableau. It is not a one-time procedure, and you need to refresh the data each time it is updated in EFM. For more information, see Import data from EFM into Tableau using Tableau WDC, page 1099.
- If you have a Verint license for Tableau Server, the export, exchange, and analysis of the EFM data is performed by clicking the Tableau tab on the **Reports** tab that redirects you to the Tableau web application. For more information, see Creating and managing reports in Tableau, page 1098

> The tab name is the display name of the Tableau connection configured by your System Administrator.

Creating and managing reports in Tableau

Navigation

Report & Analyze tab > Tableau tab > Tableau web application.

You can access Tableau to view and manage projects (surveys, file imports, or profiles), data sources, and reports that are created based on EFM surveys, profiles, and file imports by using the Tableau tab.

> To enable the Tableau feature and configure the Tableau tab for your workgroup, contact System Administrator.

The process of using Tableau for reporting and adding surveys, file imports, Speech Analytics project, comments, Unified Data Sets, and profiles is the following (same as for Business Objects):

1. System Administrator configures Tableau settings, establishes Feedback Intelligence connection for your workgroup, and activates Tableau permissions.
2. Owner of a project shares access to a survey, file import, or profile in the Actions menu, on the corresponding projects list page.

> It is recommended to share **Full Access** for the user to view and edit the project.

3. System Administrator pushes a survey, file import, or profile to Feedback Intelligence, or you click the **Push to Feedback Intelligence** option on the **Actions** menu (this option is available if the project is already added to Feedback Intelligence).

> After you or System Administrator adds a survey, file import , or profile to Feedback Intelligence, it might take some time for the data to become available for reporting in Tableau. In this case, the newly added fields are marked with red in the workbook until the data is finally uploaded to the database.

When the Tableau feature is configured for the workgroup, the **Access Tableau** permission is automatically granted to the following roles:

- Group Administrator
- Report Author
- Report Viewer
- Survey Administrator
- Survey Author

After System Administrator activates the Tableau license, all users assigned to the workgroup receive the Tableau accounts.

> By default, all users within a workgroup receive the **Viewer** site role permissions in Tableau regardless of the assigned user role. For additional permissions, contact System Administrator.

You can log in to Tableau by using the EFM credentials. Your user name in Tableau is your email address in EFM. If you change an email address in EFM, your user name in Tableau will remain the same. To set or change the Tableau password, in the EFM application, click **My Account** > **Change Tableau password**.

Import data from EFM into Tableau using Tableau WDC

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **View Responses** > **Responses tab**.

OR

Data Sources tab > **Comments tab** > click the needed comment card link > click the **View Standard Report**, **Design from Scratch**, or **View Responses** button > **Responses Manager** page.

You can import the survey, profile, or comment card response data from EFM into Tableau via Tableau Web Data Connector (WDC).

Procedure

1 On the **Actions** menu, click **Export** > **Tableau Link**.

> The users with **Report Viewer** or **Report Author** roles, who do not have access to the **Response Manager** grid, can export the data from EFM into Tableau if the Tableau link is shared with them by other users.

2 In the **Export to Tableau WDC** dialog box, copy the URL.

3 In the Tableau Desktop application, under **Connect** > **To a Server**, click **Web Data Connector**.

4 On the **Web Data Connector** page, paste the copied URL, and press **Enter**.

5 Log in with your EFM credentials.

6 On the **Verint EFM Web Data Connector** page, select the columns that you want to import. You can import all data related to profiles, surveys, and comment cards, such as data channels, participant information, location data, and other project-related data. For comment cards, columns represent all fields available in the Comments project.

> You can import the previously selected columns when exporting data for the second time by clicking the **Use previously selected columns** check box.

7 Click **Import**.

8 Click **Update Now**.
All response data that is available in EFM is now imported into Tableau WDC.

> To update the existing columns in Tableau, in a worksheet, right-click the data source, and then click **Extract** > **Refresh**. To add new columns to your data source in Tableau, right-click the data source > **Edit Data Source**.

Case Management Overview

Topics

Cases tab

Navigation

Cases tab.

You can create, view, or edit cases assigned to you and assign cases to the workgroup members.

The **Cases** tab is available if you have a license for the **Case Management** feature.

In the **Cases** grid, the following columns are available by default:

- **Case** – The case number.
- **Title** – The case name.
- **Contact's Email** – The email of the person who can provide the detailed information about the case.
- **Assigned to** – The workgroup member to whom the case is assigned.
- **Status** – The case status. The following options are available:
  - Open
  - On Hold
  - Closed
- **Priority** – The case priority. The following options are available:
  - 1 – Critical
  - 2 – Very High
  - 3 – High
  - 4 – Medium
  - 5 – Low
  - 6 – Very Low
  - 7 – Negligible
- **Last Modified** – The last time when the case was changed.

On the **Cases** page, on the toolbar, the following options are available:

- **Actions** – Select the action that you want to perform on your case. The following options are available:
  - **New** – Create a new case.
  - **Assign** – Assign one or more cases to the workgroup member.
  - **Filter** – Filter cases in the grid based on the specific criteria.
  - **Export** – Export cases to the .CSV, .TSV, or Microsoft Excel file formats.
  - **Schedule Export** - Schedule when case data is exported to Email, a local folder or an SFTP site.

- **Reopen** – Reopen the previously closed case. You can reopen multiple cases.
- **Close** – Close the case. You can close multiple cases.
- **Delete** - Delete the case. You can delete multiple cases.

The **Assign**, **Export**, and **Close** options are active only when one or more cases are selected.

- **Columns** – Select the columns to be displayed in the **Cases** grid. The following columns are available for selection:
  - **Opened by** – The name of the person who opened the case.
  - **Created** – The date and time when the case was created.
  - **Description** – The case description.
  - **First Name** – The first name of the contact person.
  - **Last Name** – The last name of the contact person.
  - **Contact's Business** – The company name of the contact person.
  - **Phone** – The phone number of the contact person.
  - **Closed** – The date and time when the case was closed.
  - **Duplicate Cases** - The names of the cases closed as duplicates.
  - **Viewed** – The number of people who saw the case.
  - **Custom Properties** – The additional values that can be set by a user to describe, categorize, and report on cases.
  - **Data Source Type** – The type of the data source. The available types are Survey, Comments, Model Survey, Speech Analytics, and File Import.
  - **Project Name** – The name of the project.
  - **Record ID** – The link with a unique ID number of the record. When clicked, it displays the Responses dialog box.
  - **Organization Name** – The name of the organization for the cases Org ID.
- **Search** – Search for the case by its title, contact information, or assignment. If you enter the number in the text field and it matches the case number, you are redirected to the case details page. The search filter is persisted while navigating through the **Cases** grid pages.

By default, all active cases assigned or unassigned to you are sorted by **Last Modified** in a descending order. You can change the view of cases in the **Cases** grid by using the customized filters. For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

The total number of cases is displayed at the bottom of the grid. You can adjust the number of cases that appears on one page. The default number of cases per page is **10**. However, you can select up to 100 cases to appear on one page. You can also navigate through the pages by clicking the scroll arrows at the bottom of the grid.

Case Management – Role-based access

Navigation

Administration tab > **Roles** tab.

The group and case administrators can control the workgroup members' access to create, view, edit, and assign cases based on the user role set of permissions. You can activate the **Case Management** functionality for a user by creating a new role or editing the existing ones.

Two new predefined roles are added to the application:

- **Case Administrator** – User is able to create, view, and configure cases regardless of the user's assignment.
- **Case User** – User is able to create, edit, and view cases assigned for that specific user only.

By default, all Case Management permissions are active for the Group Administrator, Survey Administrator, Case Administrator, and Survey Author roles.

Activate Case Management for a user role

Procedure

1 Go to the **Administration** tab > **Roles** tab.

2 On the **Roles** page, click the name of the role that you want to edit.

3 On the **Edit Role** page, define the actions the workgroup member can perform on cases by selecting the corresponding check boxes in the **View**, **Create**, and **Edit** columns in the **Case Administration** section.

- **View** – View cases assigned to you or currently unassigned.

> The selection of the **View** check box activates the **Cases** tab.

- **Create** – Add new cases.
- **Edit** – Modify cases assigned to you or currently unassigned.
- **Delete** – Remove cases assigned to you or currently unassigned. When you delete the case, the case records from all reports and dashboards are removed too.

> When you clear the **View**, **Edit**, or **Delete** check box for Cases, the **View**, **Edit**, or **Delete** check box for Organization Cases is cleared too.

4 Control the access of the workgroup member to customer emails by selecting the corresponding check boxes in the **View** and **Edit** columns in the **Customer Email** row in the **Case Administration** section.

> If the **View** check box is cleared, the following items are not visible to the workgroup member: the **Email** button when viewing a case, **Contact's Email** column in the **Cases** grid, **Contact's Email** filtering option, etc.

5 To let the workgroup member view all cases in a workgroup regardless of their assignment and organization, in the **Administration** section, select the **View All Cases** check box.

> When you select the **View All Cases** check box, the **View** check boxes for Cases and Organization Cases in the **Case Administration** section are selected automatically.

6 To let the workgroup member to edit the priority labels and create custom properties, in the **Administration** section, select the **Configure Case Settings** check box.

> When you select the **Configure Case Settings** check box, the **Configuration > Case Setup** tab is activated.

7 Click **Save**.

Organization Cases – Role-based access

Navigation

Administration tab > **Roles** tab.

The group and survey administrators can control the workgroup members' ability to view and edit organization cases based on the user role set of permissions. You can activate the **Organization Cases** functionality for a user by creating a new role or editing the existing ones. By default, all **Organization Cases** permissions are active for the group and survey administrators, case user and case administrator, and survey author.

Activate Organization Cases for a user role

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. On the **Roles** page, click the name of the role that you want to edit.
3. On the **Edit Role** page, in the **Case Administration** section, in the **Organization Cases** row, define the actions the workgroup member can perform on the organization cases by selecting the corresponding check boxes in the **View** and **Edit** columns.
   - **View** – View all cases associated with the same organization the user is assigned to and its sub-organizations.
   - **Edit** – Modify all cases associated with the same organization the user is assigned to and its sub-organizations.

> When you select the **View** or **Edit** check box for **Organization Cases**, the **View** or **Edit** check box for **Cases** is selected automatically.

4. Click **Save**.

Creating new cases

Navigation

Cases tab > **New** button on the toolbar > **Create New Case** dialog box.

You can create new cases and define their details.

> You can also open the **Create New Case** dialog box by clicking **Actions** menu > **New**.

In the dialog box, you can add the following information on the case:

- Assigned to
- Priority
- Title
- Notify Users
- Case Description

Optional fields:

- Contact's Email
- Contact's First Name
- Contact's Last Name
- Contact's Business
- Contact's Phone

Create a new case

Procedure

1. On the **Cases** tab, click the **New** button on the toolbar.
2. In the **Create New Case** dialog box, in the **Assigned to** list, select the workgroup member to whom you want to assign the case.
   By default, the case author's name is displayed. When there are more than 50 members in a workgroup, the **Assigned to** option appears as an autocompleting text box.

> If the user is out of office the case is assigned to their chosen case proxy who works on all cases while the user is out of office. The case can be assigned to the original user on their return.

3. In the **Priority** list, select the case priority.
   4 – Medium is the default option.
4. In the **Title** text field, type the case summary.
   This field is required.
5. In the **Notify Users** text field, enter the names of the persons to receive a notification that a new comment is added to the case.
   When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

6 In the **Case Description** text field, enter the case description. You can customize the case description by using the additional editing options on the toolbar.

7 In the **Contact's Email** text field, enter the email address of the person, who can provide the detailed information about the case.

8 In the **Contact's First Name** text field, enter the first name of the contact person.

9 In the **Contact's Last Name** text field, enter the last name of the contact person.

10 In the **Contact's Business** text field, enter the company name of the contact person.

11 In the **Contact's Phone** text field, enter the phone number of the contact person.

12 Click **Create**.
The new case is created and the case details page opens displaying all case data that you have defined.

Case Filters

Navigation

Cases tab > **Filter** button on the toolbar > **Filter** dialog box.

You can apply the data and date filters to the cases to view the certain results only. The data filter is based on the specific criteria that you can define on a cases data basis. The age filter is based on the date when cases are last modified, created, or closed X days (hours) ago. The date filter is based on the date when cases are opened, closed, or last modified and on the specific time period. You can use a few filters at the same time.

When you use a filter like Last Week, Last Month, Last Quarter, etc., the filter is a rolling filter. It means that the filter will continue to update relative to the current date and not the date when it is created.

Data Filter

In the **Data Filter** section, you can define the filter criteria based on your cases data. To add new criteria, click the **Add Another Criteria** link. The lists appear where you can specify the filter parameter, expression, and value.

- **Parameter** – Select the parameter by which you want to filter your cases data from the list. The following options are available:
  - Assigned to
  - Priority
  - Status
  - Contact's Email
  - Contact's First Name
  - Contact's Last Name
  - Contact's Business
  - Contact's Phone
  - Date Opened
  - Date Closed
  - Last Modified
  - Created By
  - Source
  - Title
  - Description
  - Data Source Type
  - Project Name
  - Record ID
  - Organization Name
- **Expression** – Select the expression from the list to make a comparison between **Parameter** and **Value**. The options for expression may vary depending on the selected parameter.
  The following options are available:

  - Equals
  - Does Not Equal
  - Less than
  - Greater than
  - Less than or equal
  - Greater than or equal
  - Contains
  - Does Not Contain
  - Begins With
  - Ends With
- **Value** – Select the value for filtering criteria in the list. The options vary depending on the selected parameter. For example, for the **Status** parameter, you need to select the needed case status in the list, and for the **Contact's Email** parameter, you need to type the contact data in the text box. For the date-related parameters, you need to specify a date either by using the text box or the calendar icon .
- **Save** – Click the link or anywhere else in the dialog box to save your criteria.

If you add multiple criteria, you can combine them by using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The lists with parentheses and the **And** / **Or** operators appear next to each criterion. The **And** operator defines that two or more filters linked together are true. The **Or** operator defines that one of the filters linked together is true.
- **Remove** – Click the **Remove** icon to delete the filter criteria.
- **Up/Down** – Click the **Up** or **Down** arrow to move the selected filter criteria up or down one level in the list. Filters are applied in a sequential manner, and their position in the list is important.

Age Filter

In the **Age** section, you can set the filter based on the date when cases are last modified, created, or closed X days (hours) ago. This filter is combined with the data filter. For example, you can set the following criteria:

Data Filter: Cases that are assigned to User 1

and

Age: Cases that are modified (created or closed) in X days.

Date Filter

In the **Date Filter** section, you can set the filter based on the date when cases are last modified and based on the selected time period.

- **Select Date Field** – Select an option in the list to filter the cases based on their modification date. The following options are available:
  - **None** – Applies no date filter and is selected by default.
  - **Opened Date** – Applies the filter based on the date the case was opened.
  - **Last Modified Date** – Applies the filter based on the date the case was last changed.
  - **Closed Date** – Applies the filter based on the date the case was closed.
- **Time Period** – Select an option in the list to filter the cases based on a certain time period. The following options are available:
  - **None** – Applies no time period filter and is selected by default.
  - **Today** – Shows the cases submitted today.
  - **Current Week** – Shows the cases for the current week, no matter the current date.
  - **Current Month** – Shows the cases for the current month, no matter the current date.
  - **Current Quarter** – Shows the cases for the current three months, no matter the current date.
  - **Current Year** – Shows the cases for the current calendar year, no matter the current date.
  - **Year to Date** – Shows the cases for the period starting January 1st of the current year up until the current date.
  - **Last Week** – Shows the cases for the past week.
  - **Last Month** – Shows the cases for the past month.
  - **Last Quarter** – Shows the cases for the past three months.
  - **Last Year** – Shows the cases for the past year.
  - **Custom Dates** – Shows the cases for the specific date range. When the **Custom Dates** option is selected, the **Start Date** and **End Date text** boxes appear. You can enter the date range in the corresponding text boxes manually or by using the calendar icon .

To set the default values for the date filters, click the **Clear All Date Filters** link.

Filter Cases by using the Data Filter

Procedure

1. On the **Cases** page, on the toolbar, click the **Filter** button.
2. In the **Filter** dialog box, in the **Data Filter** section, click the **Add Another Criteria** link.
   The drop-down lists appear where you can specify the filter parameter, expression, and value.
3. In the drop-down lists, select the parameter by which you want to filter your cases data, the expression to make a comparison between parameter and value, and the value for filtering criteria.
4. To save your criteria, click the **Save** link.
5. To add more criteria, click the **Add Another Criteria** link.
6. Specify if either all or any of the criteria need to be met by selecting the corresponding radio button to the right of the **Match** option.
7. To save your filter criteria, click **Apply Filter**.
   The **Cases** page is updated immediately.

Filter Cases by using the Age Filter

Procedure

1. On the **Cases** page, on the toolbar, click the **Filter** button.
2. In the **Filter** dialog box, click the **Age** section to expand it.
   You can filter by the cases, which were created 5 days ago, for example.
3. Select the check box next to the option that you want to use.
   The following options are available:
   - Date Last Modified
   - Date Created
   - Date Closed
4. Select the expression next to the selected option.
5. Type the number in the text box, which is the number of days or hours.
6. Select **Hour(s)** or **Day(s)** in the list.
7. To save your filter criteria, click **Apply Filter**.
   The **Cases** page is updated immediately.

Filter Cases by using the Date Filter

Procedure

1. On the **Cases** page, on the toolbar, click the **Filter** button.
2. In the **Filter** dialog box, in the **Date Filter** section, in the **Select Date Field** list, select an option to filter the cases based on their modification date.
3. In the **Time Period** list, select an option to filter the cases based on a certain time period.
4. To save your filter criteria, click **Apply Filter**.
   The **Cases** page is updated immediately.

When you apply filter to the cases, a notification describing the current filter appears above the **Cases** grid. You can change or cancel the custom filter by clicking the **Edit** or **Clear** link correspondingly.

Case Quick Filters

Navigation

Cases tab > **Cases** grid > **Quick Filters** option.

You can filter the cases. Quick filters are predefined filters that you can use to quickly get to the cases you need.

The following options are available:

- **All Cases** – View all cases that you have access to.
- **Assigned To Me** – View all cases assigned to you.
- **Unassigned Cases** – View all currently unassigned cases.
- **Custom Filter** – Define your own filter based on the specific criteria. For more information about filtering, see Case Filters, page 1109.

When you apply a filter to the cases, a notification describing the current filter appears above the **Cases** grid. You can change or cancel the custom filter by using the **Edit** or **Clear** link correspondingly.

> The **Edit** link is available for the custom filter only.

Add a column in the Cases grid

Navigation

Cases tab > **Columns** button on the toolbar.

You can specify which columns you want to display in the **Cases** grid.

Procedure

1. On the **Cases** tab, click the **Columns** button.
2. In the **Select Columns** dialog box, select the check box next to the **Case Fields** or **Custom Properties** that you want to add.
3. Click **Apply**.
   The added columns are now displayed in the **Cases** grid.

Exporting Cases

Navigation

Cases tab > **Actions** menu.

You can export the case data to the .CSV, .TSV, or Microsoft Excel format.

Procedure

1. Go to the **Cases** page > **Actions** menu.
2. On the **Actions** menu, point to **Export**, and then select the output format.
3. In the **Export Cases** dialog box, select the corresponding export options.
   There are the following options available:
   - **Columns** – Select if all columns or only the displayed ones should be exported.
   - **Filter** – Select if filter should be used to export the case data.
   - **Audit Log** – Select what audit information should be exported.
4. Click **Next**.
   The export file is generated in the selected format.
5. To save or open the export file, click the link that appears.
6. Click **Close**.

Schedule case data export

You can schedule case data exports regularly in a similar manner to how you schedule response data exports. The self-serve aspect of this feature means that there is no requirement to engage Verint services for the data broker service or use APIs. You can automatically pull the case data in with several options available.

To push case data into your chosen platform or file option, select the raw unformatted data, or choose to show the HTML formatting available when using a case trigger setup.

> You must have **Export** checked for **Cases** or **Organization Cases** under **Case Administration** to have access to scheduled exports for cases.

The following scheduling options are available to export case data:

- Schedule case export by Email, page 1117
- Schedule case export to folder, page 1119
- Schedule case export to SFTP, page 1120

Schedule case export by Email

You can schedule the export and email delivery of case data to email recipients.

Procedure

1. On the **Cases** tab, in the **Schedule Export** list, click **Email**.
2. On the **Schedule Export Delivery Page**, in the **Select Format** list, select the file format of the report (CSV, TSV or Microsoft Excel). To include a ZIP attachment, check **Zip attachments**, and the report in the selected format is attached to the email message in a ZIP archive.

> To specify the formatting options for your scheduled case export, click the **Export Options** link next to the **Select Format** list, then select the appropriate options.
> In the **Export Cases Scheduled** dialog box, after you save the formatting options, the next scheduled export file uses these options.

> If you applied a filter in the **Export Cases Scheduled** dialog box for your previously scheduled case exports, ensure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter on your report, on the **Schedule Export Delivery** page, click the **Export Options** link. In the **Export Cases Scheduled** dialog box, select the **Current Filter** option, then click **Save**.

3. To add recipients, do the following:
   a. In the **To** text box, type the email address.

   > You can add multiple addresses separating them by commas or semicolons.

   b. If there are organizations in a workgroup, you can click the **To** button to select the recipients. In the **Recipients** dialog box, select a check box next to the user or organization, click the right arrow button to add them to the **Recipients** list, and then click **OK**.
4. In the **From** text box, specify the email address from which you want to send your message. By default, your email address is selected.
5. In the **Subject** text box, type the message subject.
6. In the email body, type the message text and customize it by using the editing toolbar.
7. To preview your message, click the **Preview** button.
8. To test your message before delivering it to the recipient, do the following:
   a. Click the **Send Test Email** button.
   b. In the **Send Test Email** dialog box, in the **Email Address** field, type the test email address, and then click the **Send** button.
9. In the **Delivery Schedule** section, define when and how to deliver the case data:
   - **No Scheduling** – Select to send your message later. This option removes scheduling and stops sending of email notifications.
   - **Send Now** – Select to end your message immediately.

> A delay of several minutes can be expected before your email is delivered.

- **Send at a specific date and time** – Specify a date and time when you want to deliver your email message. Select a valid start date and time; otherwise, the email message will not be saved.

> To schedule regular messages delivery (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set an end date or select **No End Date**.

10 Click **Save**.

> When the **Send Now** option is selected in the **Delivery Schedule** section, the **Send Report** button is displayed instead of the **Save** button.

Schedule case export to folder

You can schedule a case data export to your local folder, which is located in {EFM Install}\AppData\{groupID}\Cases\

Procedure

1 On the **Cases** tab, in the **Schedule Export** list, click **Folder**.

2 On the **Schedule Export Delivery Page**, in the **Select Format** list, select the format of the file (CSV, TSV or Microsoft Excel) to export to your local folder. To include a ZIP attachment, check **Zip attachments**, and the report in the selected format is attached to the email message in a ZIP archive.

> To specify the formatting options for your scheduled case export, click the **Export Options** link next to the **Select Format** list, then select the appropriate options.
> In the **Export Cases to Folder Scheduled** dialog box, after you save the formatting options, the next scheduled export file uses these options.

> If you applied a filter in the **Export Cases to Folder Scheduled** dialog box for your previously scheduled case exports, ensure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter to your report, on the **Schedule Export Delivery** page, click the **Export Options** link. In the **Export Cases to Folder Scheduled** dialog box, select the **Current Filter** option, then click **Save**.

3 In the **Delivery Schedule** section, define when and how to deliver the case export:

- **No Scheduling** – Select to send your file later. This cancels the export to folder but not email notifications.
- **Export Now** – Select this to export the file immediately.
- **Export at a specific date and time** – Specify a date and time when you want to export your file. Select a valid start date and time; otherwise, the file is not saved.

> To schedule a regular export (daily, weekly, or monthly), click the **Show Recurrence Options** link. You can also set an end date or click **No End Date**.

4 Click **Save**.

> When the **Export Now** option is selected in the **Delivery Schedule** section, the **Export Now** button is displayed instead of the **Save** button.

Schedule case export to SFTP

You can schedule an export of case data to an SFTP server.

Procedure

1 On the **Cases** tab, in the **Schedule Export** list, click **SFTP**.

2 On the **SFTP Delivery Page**, in the **Select Format** list, click the required file format: CSV, TSV, or Microsoft Excel. To include a ZIP attachment, check **Zip attachments**, and the report in the selected format is attached to the email message in a ZIP archive.

> To specify the formatting options for your scheduled case export, click the **Export Options** link next to the **Select Format** list, then select the appropriate options.
> In the **Export Cases to SFTP Scheduled** dialog box, after you save the formatting options, the next scheduled export file uses these options.

> If you applied a filter in the **Export Cases to SFTP Scheduled** dialog box for your previously scheduled case exports, ensure that your newly set filter is enabled for the next scheduled export. To enable the currently applied filter to your report, on the **Schedule Export Delivery** page, click the **Export Options** link. In the **Export Cases to SFTP Scheduled** dialog box, select the **Current Filter** option, then click **Save**.

3 In the **SFTP Settings** sections, configure your SSH FTP connection:

- **Server name** – Name of the server where SFTP is located and where you want to export the file.
- **Port** – Port number for the specified server.
- **Path** – Location on a server to where you want to export the file.
- **User Name** – User name for the specified server.
- **Password** – Password for the specified server.

4 To validate the connection, click **Test Settings**.

5 In the **Delivery Schedule** section, define the case export delivery schedule and the recurrence options. The following options are available:

- **No Scheduling** – Select to send your file later. This cancels the export to SFTP but not email notifications.
- **Export Now** – Export case data immediately.
- **Export at a specific date and time** – Specify a date and time when you want to export your file. You can either type the date and time manually into the available text field or select the date and time from pop-up menus. Select a valid start date and time, otherwise the file will not be saved.

> Click the **Show Recurrence Options** link to set recurrence options for your file delivery. Use this functionality to export a file multiple times on a daily, weekly, or monthly basis. You can also set an end date or select **No End Date**.

6 Click **Save**.

When the **Export Now** option is selected in the **Delivery Schedule** section, the **Export Now** button is displayed instead of the **Save** button.

Case Management – Notify users

Navigation

Cases tab > click the case title or the case number > case details page.

You can receive email notifications when new cases are created or existing cases are updated. Also, you can define the users who will receive notifications.

You can notify users about the following actions performed on a case:

- Creating a new case on the **Cases** page or by the trigger
- Adding comment to a case
- Changing case description, status, or priority
- Assigning a new case
- Sending an email message to a contact person

> When the case is assigned to any user, you can select only users with the **View All Cases** permission to send notifications. For unassigned cases, you can select any user to send notifications.

The email notification contains the name of the user who performed an action on a case, case ID, case title, case priority, the URL to a case, and the action description.

You can notify multiple users at a time. The information about the notification appears on the case details page along with the related event.

Case triggers

Navigation

Design & Collect tab > **Triggers** tab > **Add Trigger** button.

You can define case triggers to create cases based on the specific survey responses and respondent location. For the case triggers, you need to define criteria for your triggers and specify a person who receives the details of the case that is created when respondents select the specific answer or belong to a specified location.

The case triggers are available only if you have a license for the **Case Management** feature and the **Case Administration** > **Cases** permission enabled.

On the **Case Details** tab, in the **Add Trigger** dialog box, you can add the following information for the case:

- Assigned to
- Priority
- Title
- Notify Users
- Case Description

Optional fields:

- Contact's Email
- Contact's First Name
- Contact's Last Name
- Contact's Business
- Contact's Phone

Create a case trigger

Procedure

1. On the **Triggers** tab in the survey designer, click the **Add Trigger** button.
2. In the **Add Trigger** dialog box, in the **Description** text box, enter a short summary of the trigger.
3. In the **Trigger Action** drop-down list, click **Create a Case**.
4. On the **Criteria** tab, click the **Add Another Criteria** link.
5. Click the link next to **Source**, and then select one of the following sources:
   - **Current Survey** (default) – Select the filter parameter, expression, and value from the drop-down lists:

   a. In the first drop-down list, click one of the following options to apply the logic to:
      - Survey question
      - Response count criterion with the values from 0 to the specific number of choices or columns in Choose Many, Matrix with Choose One or Choose Many sides, or Scrolling Matrix questions

- Device type criterion

> The device type and the response count criteria can be combined with other criteria for conditional visibility.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click one of the following:

- Question choice
- Number of responses provided by the respondent
- Detected type of device

> When the report or export value is set for a choice, it is displayed instead of the choice index and is used as an identifier for the choice.

- **Participant Information** – Select the filter parameter, expression, and value from the drop-down lists:

a. In the first drop-down list, Campaign Name is selected.

b. In the second drop-down list, click the expression.

c. In the third drop-down list, click the needed campaign.

> The Campaign Name source is available only after you add at least one campaign on the Collect tab.

- **Respondent Location** – Select the filter parameter, expression, and value from the corresponding drop-down lists:

a. In the first drop-down list, click the needed parameter.

b. In the second drop-down list, click the expression, and then type the needed value in the adjacent box.

6 Click the **Save** link to save your criteria.

7 Click the **Add Another Criteria** link to add more criteria.

8 Specify if either all or any of the criteria need to be met by selecting the corresponding **Match** option.

9 Click the **Case Details** tab.

10 In the **Assigned to** text box, type the name of the workgroup member, to whom you want to assign the case. By default, the case is unassigned. The **Assigned to** text box is an autocompletion text box.

> You can also pipe values in the Assigned to text box from any question in the survey by typing the placeholder value in the text box, for example, %Q1_1%. You can pipe the user name or email. When the trigger is activated, the piped value is matched to a user name or email. If no match is found, the case is unassigned.

11 In the **Priority** drop-down list, click the case priority. **4 - Medium** is the default option.

12 In the **Title** text box, type the case summary.

13 In the **Notify Users** text box, enter the names of the persons to receive a notification that a new case is created. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

14 In the **Case Description** text box, type the case description. You can customize the case description by using the additional editing options from the toolbar.

> You can also pipe different fields in your case description using the Insert Piped Value icon on the toolbar.

15 In the **Contact's Email** text box, enter the email address of the person, who can provide the detailed information about the case.

16 In the **Contact's First Name** text box, type the first name of the contact person.

17 In the **Contact's Last Name** text box, type the last name of the contact person.

18 In the **Contact's Business** text box, type the company name of the contact person.

19 In the **Contact's Phone** text box, type the phone number of the contact person.

20 In the **Custom Properties** section, select the custom case property. The case properties are available only if specified on the **Case Setup** tab by **Case Administrator**.

21 Click **OK**. The created trigger appears on the **Triggers** tab.

Organizations and Cases

Navigation

Cases tab.

Cases are assigned to an organization based on the case owner. When new cases are created and assigned to the users, their organization is associated with these new cases. When a case is reassigned to another user, the organization of the case is updated accordingly.

Case users can view all cases that are assigned to their organization. This way case users can see other cases that are relevant to them even if they are not assigned to them. They can track the case creation, assignment, or reassignment in their organization.

If the organization is deleted, all cases assigned to the members of that organization are no longer associated with the organization.

Case Details page

Navigation

Cases tab > click the case title or the case number > case details page.

You can view the details of the new and existing cases. The case details page opens when you create a new case or click the existing case in the **Cases** grid. You can navigate through the open cases, change case status and priority, assign case to the workgroup members, send email notifications to the contact person, and add comments to the case. In addition, you can see the history of all events on a case in an ordered list.

When the case details page opens, the case name and number are displayed at the top of the page, for example, **Case 9**. The **Next Case** and **Previous Case** arrows provide easy navigation to the next and previous cases within the case details page.

> The arrows become active when there are cases after or before the current case.

You can go back to the **Cases** page by clicking the **Return to Cases** link at the top of the page.

On the case details page toolbar, you can find the following options:

- Send an email message for cases, page 1132
- Close or reopen a case, page 1135
- Assign or reassign a case to a user , page 1130
- Put on hold or resume a case, page 1133
- Case Details – Case Properties, page 1138
- Case Details – Response Information, page 1137
- Add comments to a case, page 1139
- Case Details – History, page 1140

On the page, you can view and edit the following case details:

- **Title** – The case name.
- **Description** – The case's short summary.
- **Status** – The current case status (Open, On Hold, Closed).
- **Priority** – The current case priority that appears as a link, for example, 4 – Medium.
- **Assigned to** – The workgroup member to whom the case is currently assigned.
- **Contact Information** – The information about the contact person.

Contact Information

In the **Contact Information** section, the information about the contact person is displayed. The contact information is defined while creating the case. For more information, see Creating new cases, page 1107.

> If the contact information includes the email address, the address appears as a link in the **Contact Information** section. You can send an email message to a contact person by clicking the email link. For details, see Send an email message for cases, page 1132.

The contact information appears as the links in the **Contact Information** section. You can edit the contact information by clicking the corresponding link. By default, each link is set to **Not Set** if it was not edited during the case creation. When you click the link, the text field appears instead of the link, where you can enter the contact information. When you click the **Email** link, the auto-completion text field appears.

You can also edit the contact information for the closed case.

> You cannot edit the contact information if the contact is a panelist.

Additionally, if multiple cases are assigned to a single user, they appear as the links under **Other Open Cases** in the **Contact Information** section. You can view the other cases by clicking the corresponding link. When you click the **View All** link, the **Cases** page opens displaying all cases assigned to the selected user. A notification describing the current filter appears above the **Cases** grid.

Edit the case details

Procedure

1. On the **Cases** tab, click the case name or number in the grid.
2. On the case details page, click the case title field.
   The case title field becomes editable.
3. Edit the case title.
4. Press **Enter** to save your changes.
5. Click the case description field.
6. In the **Case Description** dialog box, enter the case description text. You can customize the text by using the editing toolbar, which provides additional editing options.
7. In the **Notify Users** text field, enter the names of the persons to receive a notification that the case is edited. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an auto-completion text box.
8. To apply changes, click **Save**.
9. Click the current case priority that appears as a link, for example, **4 – Medium**.
10. In the **Priority** list, click the necessary option, and click **Save**.
    The following priority options are available:
    - 1 – Critical
    - 2 – Very High
    - 3 – High
    - 4 – Medium
    - 5 – Low
    - 6 – Very Low
    - 7 – Negligible
11. In the **Assigned to** field, click the link, and in the **Assign Case** dialog box, select the assignee.
12. In the **Contact Information** section, fill out the following fields:
    - Email
    - First Name

- Last Name
- Contact's Business
- Phone

Assign or reassign a case to a user

Navigation

Cases tab > click the case title or the case number > case details page > **More Actions** button.

You can assign cases to the workgroup members. Also you can change the case owner and add comments while changing the assignment. If needed, you can delete a user.

Procedure

1. On the **Cases** tab, click the case name or number in the grid.
2. On the case details page, click the **More Actions** button > **Assign** option.
3. In the **Assign** dialog box, in the **Assign Case to User** list, select the workgroup member to whom you want to assign the case. When there are more than 50 members in a workgroup, the **Assign Case to User** option appears as an auto-completion text box.

> If the user is out of office the case is assigned to their chosen case proxy who works on all cases while the user is out of office. The case can be assigned to the original user on their return.

4. In the **Notify Users** text field, enter the names of the persons to receive a notification about the new case assignment. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an auto-completion text box.
5. Enter the comments while changing the assignment.
   You can customize the comment text by using the editing toolbar, which provides additional editing options.
6. Click **Assign**.

   If the user you assigned the case to is out of office, a message is displayed to inform you that the case will be assigned to a proxy instead of the intended user.

   Click **OK**.

   The case is assigned to the selected user, and the **Cases** page opens. The added comment appears on the case details page under description.

> You can reassign a case to other users in the workgroup if it is a case trigger and you have the **Reassign Cases** permission enabled.

Case Assignment notification

Navigation

Account menu > **My Account** option > **Case Management** tab > **Emails** section.

You can receive email notifications when a new case is assigned to you either by another user or based on trigger criteria.

To activate this option, go to the **Case Management** tab > **Emails** section > select the **Receive notification emails when Cases are assigned to you.** check box.

This option is active by default. When a new case is created by the trigger that is not set for sending an email message, you will not receive the case assignment notification.

Send an email message for cases

Navigation

Cases tab > click the case title or the case number > case details page > **Email** button.

You can send an email to the customer from within the application. You can customize the email text by using the editing toolbar.

Procedure

1. Go to the **Cases** tab > click the case name or number.
2. On the case details page toolbar, click the **Email** button.
3. In the **Email** dialog box, in the **From** list, select an email address from which you want to send your invitation.
   By default, your current email address appears in the **From** text box.
4. In the **To** field, enter the recipient's email address.
   By default, the contact person's email address appears in the **To** field. You can add multiple recipients by entering any valid email addresses separated by commas.
5. In the **Notify Users** text field, enter the names of the persons to receive a notification that a new email message is sent.
   When there are more than 50 members in a workgroup, the **Notify Users** option appears as an auto-completion text box.
6. In the **Subject** field, enter the subject of your email message.
   The default subject is the case name and number, for example, **Case 16: Property Case**.
7. Type your email text.
   You can customize the text by using the editing toolbar, which provides additional editing options.
8. Click **Send**.
   Your email is sent to the selected users.
9. Click **Close**.

Put on hold or resume a case

Navigation

Cases tab > click the case title or the case number > case details page > **Status** list > **On Hold** option.

You can put a case on hold or make a case active to reflect the interaction with the customer better.

You can set the case status to **On Hold** when you are waiting for information from a customer, for example, and time calculations will be paused. You can add comments while putting the case on hold and customize the comment text by using the editing toolbar.

When the case status is **On Hold**, the **Resume** button appears. You can use the **Resume** button to reactivate the case and time calculations will be resumed.

> You can put cases on hold only if you have permissions to edit the cases.

Put the case on hold

Procedure

1 Go to the **Cases** tab > click the case name or number.

2 On the case details page, in the **Status** list, click the **On Hold** option.

> If the property is marked as required, you cannot put the case on hold until you provide a value for the property.

3 In the **Put Case On Hold** dialog box, in the **Notify Users** text field, enter the names of the persons to receive a notification that the case is put on hold.
When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

4 Enter the reason for putting the case on hold.
You can customize the text by using the editing toolbar, which provides additional editing options.

5 Click **Hold**.
The case status updates immediately.

Resume the Case

Procedure

1 Go to the **Cases** tab > click the case name or number.

2 On the case details page toolbar, click the **Resume** button.

3 In the **Resume Case** dialog box, in the **Notify Users** text field, enter the names of the persons to receive a notification that the case is resumed.
When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

4 Enter your comments.
You can customize the comment text by using the editing toolbar, which provides additional editing options.

5 Click **Resume**.
The case status updates immediately.

Close or reopen a case

Navigation

Cases tab > click the case title or the case number > case details page > **Close**/**Reopen** button.

You can close or reopen the case to reflect the interaction with the customer better. You can add comments while closing the case and customize the comment text by using the editing toolbar.

When the case is closed, the **Close** button is displayed as **Reopen**. You can use the **Reopen** button to reopen the case and add comments if needed.

Close a case

Procedure

1. Go to the **Cases** tab, click the case name or number.
2. On the case details page, click the **Close** button.

> If the property is marked as required, you cannot close the case until you provide a value for the property.

3. In the **Close Case** dialog box, in the **Notify Users** text field, enter the names of the persons to receive a notification that the case is closed.
   When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.
4. Enter the reason for closing the case.
   You can customize the text by using the editing toolbar, which provides additional editing options.
5. If the selected case is a duplicate, select the **Is this a duplicate of a different case** check box and provide the primary case number in the text field next to it.
   The text field is active only when the check box is selected.
6. Click **Close**.
   The case status updates immediately.

> When the case is closed as a duplicate, its status is **Closed as Duplicate of #** with a number of the primary case displayed as a hyperlink. The case name appears in the tooltip when you hover over the hyperlink. You can use the hyperlink to access the primary case.

Reopen a case

Procedure

1. Go to the **Cases** tab, click the case name or number.
2. On the case details page, click the **Reopen** button.
3. In the **Notify Users** text field, enter the names of the persons to receive a notification that the case is reopened.
   When there are more than 50 members in a workgroup, the **Notify Users** option appears as an autocompletion text box.

4. Enter the reason for reopening the case.
   You can customize the text by using the editing toolbar, which provides additional editing options.
5. Click **Reopen**.
   The case becomes assigned to you.

Case Details – Response Information

Navigation

Cases tab > click the case title or the case number > case details page > **Response Information** tab.

You can see the information about responses from your participants. If the case is created by a case trigger, the **Response Information** section appears on the case details page. In this section, if the case is created by a survey or file import trigger, the source survey name or file import name and the record ID used for the case trigger are available. For comments and Text Analytics cases, the Campaign Name, Campaign Type, and Status information is not shown.

The **Response Information** tab appears only if you create a case trigger. For more information about case triggers, see Case triggers, page 1123.

The following information is displayed on the page:

- **Record ID** – Displays the unique ID number of a response.
- **Campaign Name** – Displays the name of a campaign.
- **Campaign Type** – Displays the name of a distribution type.
- **Show completed only** – Select the check box to show only completed responses.
- **Hide hidden questions** – Select the check box to hide questions with visibility set to Hidden.
- **Wrap text** - Select the check box to resize and display the full contents of the Question Text and Response rows.
- **Export Responses to PDF** – Click the link to export responses in the PDF format.
- **Question Text** – Displays the text of the question.
- **Response** – Displays the response to the question.
- **Status** – Displays the status of the question.

Case Details – Case Properties

Navigation

Cases tab > click the case title or the case number > case details page > **Case Properties** tab.

Case properties are additional values that can be set by a user to describe, categorize, and report on cases. The case properties appear in the set order on the **Case Details** page > **Case Properties** tab after you create them on the **Case Setup** page. To set a value for the property, click the drop-down list under the corresponding property, and then type the needed text in the box or select the required choice from the list. The **Not Set** value is available for all case properties that are not set as required.

If you make the property required on the **Case Setup** page, and select the **Select an Option** value for a property, you will not be able to open, put on hold, or close the case depending on the status that you selected in the **Status For Required** list.

The case properties are available only if specified on the **Configuration** tab > **Case Setup** tab.

Add comments to a case

Navigation

Cases tab > click the case title or the case number > case details page > **Comments** tab.

You can view and add comments to the case which allows you to better segment data associated with the case.

Procedure

1. On the **Cases** tab, click the case name or the number in the grid.
2. On the case details page, on the **Comments** tab, click the **Add Comment** button.
3. In the **Add Comment** dialog box, in the **Notify Users** text field, enter the name of the person to receive a notification that a new comment is added to the case. When there are more than 50 members in a workgroup, the **Notify Users** option appears as an auto-completion text box.
4. Enter the comment text.

   You can customize the comment text by using the editing toolbar, which provides additional editing options.
5. Click **Add**.

   The added comment appears on the case details page under description.

Case Details – History

Navigation

Cases tab > click the case title or the case number > case details page > **History** tab.

You can view particular details about the case including the actions performed on it. It allows you to better segment the data associated with the case and you can always find the historical information about the needed case.

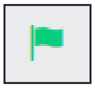
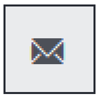
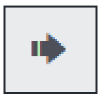
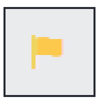
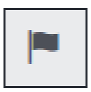
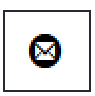
All actions that were performed on the case appear in an ordered list with the most recent action at the top. Each action type has its own indicator. The indicators appear in different color to the left of each event for better identification. This way you can view the history of changes and current status of a case. For more information about the indicators, see List of Case Indicators, page 1141.

The following actions are displayed on the **History** tab:

- Opened by
- Closed by
- Closed as Duplicate
- Resumed by
- Placed on hold by
- Priority changed to
- Assigned to
- Description edited by
- Changed contact information
- Changed case property

List of Case Indicators

The list of indicators used on the **Cases** tab.

List of Case Indicators	
	The **Open** icon notifies that the case is opened, reopened, or resumed.
	The **Edit** icon notifies that comments are added or the case name, description, priority, or custom property is changed.
	The **Email Sent** icon on the case details page.
	The **Assigned to** icon on the case details page.
	The **Placed On Hold** icon on the case details page.
	The **Closed** icon on the case details page.
	The **Last Updated** icon appears next to the cases which have not been updated in over 7 days.
	The **Unassigned** icon appears next to the currently unassigned cases.
	The **Newly Assigned** icon appears next to the cases that have been recently assigned to you.

Case Management reporting overview

Navigation

Report & Analyze tab > **Case Reports** tab.

You can view the general and detailed information on case management within the workgroup, such as statuses, priorities, comments, reassigns, and emails.

The following report types are available:

- Case Summaries, page 1143
- Case Averages, page 1149
- Case Priorities, page 1152
- Case Event Breakdown, page 1155

The **Case Reports** page is available if the **Case Management** permissions are enabled for your user role.

Case Summaries

Navigation

Report & Analyze tab > **Case Reports** tab > **Case Summaries** option.

You can view general information about your cases and filter the cases by status, user name, contact person data, and custom properties. In addition, you can export the existing cases data into the .CSV, .TSV, and Microsoft Excel file formats.

In the **Case Summaries** grid, the following columns are available:

- **Contact's Business** – The column content depends on the option selected from the **Segmented by** list above the grid. The **Contact's Business** is the default option.

> All cases without a contact's business or email are grouped in the **Unknown** row. When the **User** option is selected in the **Segmented by** list, the **Unassigned** row is displayed instead of **Unknown**, showing all unassigned cases.

- **Cases Opened** – The number of opened cases.
- **Cases On Hold** – The number of cases on hold.
- **Cases Closed** – The number of closed cases.
- **Total Cases** – The total number of cases.

At the bottom of the grid, the **Totals** row appears that totals all values in the corresponding columns.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting. At the bottom of the page, a toolbar enables you to adjust the number of items that displays on one page. You can adjust the number of items that appears on one page. The default number of items per page is **10**. However, you can select up to 100 items to appear on one page. You can also navigate through the pages of items by clicking the scroll arrows at the bottom of the dialog box.

You can select the type of data that the case report is filtered by in the **Segmented by** list. The following options are available:

- Core Properties
  - Contact's Business
  - Contact's Email
  - User
- Source
  - Surveys
- Custom Properties

In this subsection, the available custom properties are displayed. For details on the cases custom properties, see Case Management – Notify users, page 1122.

You can also define which cases to display on the **Case Summaries** page by using the **Displaying** list. The following options are available:

- **Cases Opened** – Displaying all cases, regardless of their current status.
- **Cases Closed** – Displaying all cases with the **Closed** status.

When you select another option in the **Segmented by** or **Displaying** list, the case report is regenerated immediately.

The **Case Summaries** report settings are saved within one session.

Case Report Filtering

You can apply the data filters to the case summaries to view the data that represents a certain value in the report. When you click the value in the **Case Summaries** grid, the results according to the applied custom filter are availbale on the **Cases** page. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

You can also filter the case summaries to view the information for a specific time period by using the date filter menu. You can apply the following date filters:

- **Date Range** – Define a date range to filter the information in the **Case Summaries** grid. The following options are available:
  - **None** – Applies no date filter.
  - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
  - **Today** – Shows the data for today.
  - **Current Month** – Shows the data for the current month, no matter the current date.
  - **Current Quarter** – Shows the data for the current three months, no matter the current date.
  - **Current Year** – Shows the data for the current calendar year, no matter the current date.
  - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
  - **Last Week** – Shows the data for the past week.
  - **Last Month** – Shows the data for the past month.
  - **Last Quarter** – Shows the data for the past three months.
  - **Last Year** – Shows the data for the past year.
  - **Last 30 Days** – Shows the data for the past 30 days.
  - **Last 90 Days** – Shows the data for the past 90 days.
  - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

Export the Case Report

Procedure

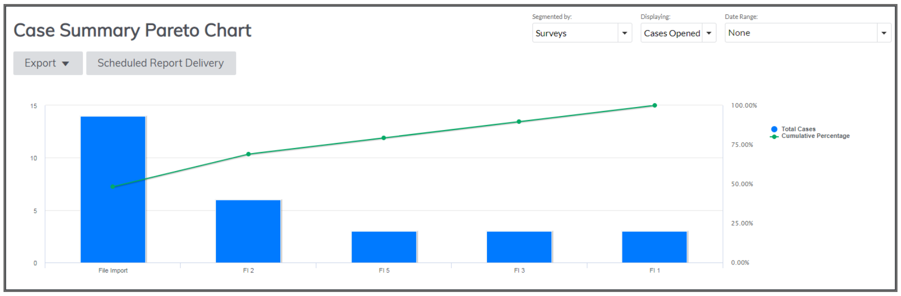
1. On the **Case Summaries** page, click the **Export** menu on the toolbar.
2. On the **Export** menu, select the output format.
3. In the **Export Case Report** dialog box, your file is generated in the selected format.
4. Click the link that appears to open or save the exported file. The file contains all data displayed in the grid at the moment of export regardless of the viewed page. If you apply the filter to the grid, only the filtered data is exported.
5. Click **Close**.

Case Summary Pareto Chart

Navigation

Report & Analyze tab > **Case Reports** tab > **Case Summary Pareto Chart** option.

You can view the case counts by core or custom properties in a Pareto chart. The Pareto chart is a type of chart that contains both bars and a line graph, where individual values are represented in descending order by bars, and the cumulative total is represented by the line. By looking at the bars and line, you can quickly determine, which cases make up 80% of your activity.



Case Summary Pareto Chart

The following charts are displayed in the **Case Summary Pareto Chart**:

- **Total Cases** – The number of cases according to the option selected in the **Segmented by** list above the chart against the total number of cases. The individual column appears for each option. The **Contact's Business** is the default option. The columns are arranged in a descending order from left to right. The chart may include up to 12 columns.
- **Cumulative Percentage** – The cumulative percentage of cases according to the option selected in the **Segmented by** list above the chart against the total percentage of valid cases. The cumulative percentage shows when you hover over the chart.
  The cumulative percentage is calculated in the following way:
  cumulative percentage = (cumulative frequency/total number of valid cases) x 100
  The example below describes the cumulative percentage calculation for the Pareto chart that includes three **Total Cases** columns:

  A = number of cases in the first column

  B = number of cases in the second column

  C = number of cases in the third column

  T = total number of cases

  X = the first point on the cumulative percentage chart

  Y = the second point of the cumulative percentage chart

  Z = the third point of the cumulative percentage chart

  The first point of the cumulative percentage chart is calculated as:

  A / T * 100 = X

  The second point of the cumulative percentage chart is calculated as:

  (A + B) / T * 100 = Y

The third point of the cumulative percentage chart is calculated as:

(A + B + C) / T * 100 = Z

You can click the label on the legend to show or hide the corresponding displayed value.

You can select the type of data that the case report is filtered by in the **Segmented by** list. The following options are available:

- Core Properties
  - Contact's Business
  - Contact's Email
  - User
- Source
  - Surveys
- Custom Properties

  In this subsection, the available custom properties are displayed. For details on the cases custom properties, see Case Management – Notify users, page 1122.

You can also define which cases to display on the **Case Summary Pareto Chart** page by using the **Displaying** list. The following options are available:

- **Cases Opened** – Displaying all cases, regardless of their current status.
- **Cases Closed** – Displaying all cases with the **Closed** status.

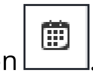
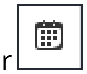
The **Case Summary Pareto Chart** report settings are saved within one session.

Case Report Filtering

When you click the chart value, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

You can also filter the **Case Summary Pareto Chart** to view the information for a specific time period by using the date filter menu. You can apply the following date filters:

- **Date Range** – Define a date range to filter the information in the **Case Summary Pareto Chart** report. The following options are available:
  - **None** – Applies no date filter.
  - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
  - **Today** – Shows the data for today.
  - **Current Month** – Shows the data for the current month, no matter the current date.
  - **Current Week** – Shows the data for the current week, no matter the current date.
  - **Current Quarter** – Shows the data for the current three months, no matter the current date.
  - **Current Year** – Shows the data for the current calendar year, no matter the current date.
  - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
  - **Last Month** – Shows the data for the past month.
  - **Last Quarter** – Shows the data for the past three months.
  - **Last Year** – Shows the data for the past year.

  - **Last Week** – Shows the data for the past week.
  - **Last 30 Days** – Shows the data for the past 30 days.
  - **Last 90 Days** – Shows the data for the past 90 days.
  - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar  icon.
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

Export the Case Report

Procedure

1. On the **Case Summary Pareto Chart** page, click the **Export** menu on the toolbar.
2. On the **Export** menu, select the output format.
3. In the **Export Case Report** dialog box, your file is generated in the selected format.
4. Click the link that appears to open or save the exported file.
   The file contains all data displayed in the grid at the moment of export regardless of the viewed page.
5. If you apply the filter to the grid, only the filtered data is exported.
6. Click **Close**.

Case Averages

Navigation

Report & Analyze tab > **Case Reports** tab > **Case Averages** option.

You can view how your workforce is handling the cases on average. In addition, you can export the existing cases data into the .CSV, .TSV, and Microsoft Excel file formats.

In the **Case Averages** grid, the following columns are available:

- **Contact's Business** – The column content depends on the option selected in the **Segmented by** list above the grid.
  The **Contact's Business** is the default option.

> All cases without a contact's business or email are grouped in the **Unknown** row. When the **User** option is selected in the **Segmented** by list, the **Unassigned** row is displayed instead of **Unknown**, showing all unassigned cases.

- **Average Open Time** – The average open time of the cases regardless of their current status.
- **Average Hold Time** – The average hold time of the cases regardless of their current status.
- **Average Resolution Time** – The average open time of the currently closed cases.
- **Average Total Case Time** – The average open plus hold time of the cases regardless of their current status.

At the bottom of the grid, the **Workgroup Averages** row appears that totals all values in the corresponding columns.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting. At the bottom of the page, on the toolbar, you can adjust the number of items that are displayed on one page. You can adjust the number of items that appears on one page. The default number of items per page is **10**. However, you can select up to 100 items to appear on one page. You can also navigate through the pages of items by clicking the scroll arrows at the bottom of the dialog box.

You can select the type of data that the case averages report is filtered by in the **Segmented by** list. The following options are available:

- Core Properties
  - Contact's Business
  - Contact's Email
  - User
- Source
  - Surveys
- Custom Properties

In this subsection, the available custom properties are displayed. For details on the cases custom properties, see Case Management – Notify users, page 1122.

You can also define which cases to display on the **Case Averages** page by using the **Displaying** list. The following options are available:

- **Cases Opened** – Displaying all cases, regardless of their current status.

- **Cases Closed** – Displaying all cases with the **Closed** status.

> When you select another option in the **Segmented by** or **Displaying** list, the case report is regenerated immediately.

Case Report Filtering

You can apply the data filters to the case averages to view the data that represents a certain value in the report. When you click the value in the first column of the **Case Averages** grid, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. A notification describing the current filter appears above the **Cases** grid.

You can also filter the case averages to view the information for a specific time period by using the date filter menu. You can apply the following date filters:

- **Date Range** – Define a date range to filter the information in the **Case Averages** grid. The following options are available:
    - **None** – Applies no date filter.
    - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
    - **Today** – Shows the data for today.
    - **Current Month** – Shows the data for the current month, no matter the current date.
    - **Current Quarter** – Shows the data for the current three months, no matter the current date.
    - **Current Year** – Shows the data for the current calendar year, no matter the current date.
    - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
    - **Last Week** – Shows the data for the past week.
    - **Last Month** – Shows the data for the past month.
    - **Last Quarter** – Shows the data for the past three months.
    - **Last Year** – Shows the data for the past year.
    - **Last 30 Days** – Shows the data for the past 30 days.
    - **Last 90 Days** – Shows the data for the past 90 days.
    - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

> For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

Export the Case Report

Procedure

1 On the **Case Averages** page, click the **Export** menu on the toolbar.

2 On the **Export** menu, select the output format.

3 In the **Export Case Report** dialog box, your file is generated in the selected format.

4 Click the link that appears to open or save the exported file. The file contains all data displayed in the grid at the moment of export regardless of the viewed page. If you apply the filter to the grid, only the filtered data is exported.

5 Click **Close**.

Case Priorities

Navigation

Report & Analyze tab > **Case Reports** tab > **Case Priorities** option.

You can view what kind of cases is being created. In addition, you can export the existing cases data into the .CSV, .TSV, and Microsoft Excel file formats.

In the **Case Priorities** grid, the following columns are available:

- **Contact's Business** – The column content depends on the option selected in the **Segmented by** list above the grid.
  The **Contact's Business** is the default option.

> All cases without a contact's business or email are grouped in the **Unknown** row. When the **User** option is selected in the **Segmented by** list, the **Unassigned** row is displayed instead of **Unknown**, showing all unassigned cases.

- **Critical** – The cases with the Critical priority.
- **Very High** – The cases with the Very High priority.
- **High** – The cases with the High priority.
- **Medium** – The cases with the Medium priority.
- **Low** – The cases with the Low priority.
- **Very Low** – The cases with the Very Low priority.
- **Negligible** – The cases with the Negligible priority.
- **Totals** – The total number of cases according to the option selected in the**Segmented by** list.

At the bottom of the grid, the **Totals** row appears that totals all values in the corresponding columns.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting. At the bottom of the page, a toolbar enables you to adjust the number of items that displays on one page. You can adjust the number of items that appears on one page. The default number of items per page is **10**. However, you can select up to 100 items to appear on one page. You can also navigate through the pages of items by clicking the scroll arrows at the bottom of the dialog box.

You can select the type of data that the case priorities report is filtered by in the **Segmented by** list. The following options are available:

- Core Properties
  - Contact's Business
  - Contact's Email
  - User
- Source
  - Surveys
- Custom Properties

In this subsection, the available custom properties are displayed. For details on the cases custom properties, see Case Management – Notify users, page 1122.

You can also define which cases to display on the **Case Priorities** page by using the **Displaying** list. The following options are available:

- **Cases Opened** – Displaying all cases, regardless of their current status.
- **Cases Closed** – Displaying all cases with the **Closed** status.

When you select another option in the **Segmented by** or **Displaying** list, the case report is regenerated immediately.

Case Report Filtering

You can apply the data filters to the case priorities to view the data that represents a certain value in the report. When you click the value in the **Case Priorities** grid, the **Cases** page opens displaying the results according to the applied custom filter. The custom filter criteria is based on the selected value. For example, if you click the specific segmented value, the filter will be **All cases assigned the specific segmented value**. A notification describing the current filter appears above the **Cases** grid.

You can also filter the case priorities to view the information for a specific time period by using the date filter menu. You can apply the following date filters:

- **Date Range** – Define a date range to filter the information in the **Case Priorities** grid. The following options are available:
  - **None** – Applies no date filter.
  - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
  - **Today** – Shows the data for today.
  - **Current Month** – Shows the data for the current month, no matter the current date.
  - **Current Quarter** – Shows the data for the current three months, no matter the current date.
  - **Current Year** – Shows the data for the current calendar year, no matter the current date.
  - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
  - **Last Week** – Shows the data for the past week.
  - **Last Month** – Shows the data for the past month.
  - **Last Quarter** – Shows the data for the past three months.
  - **Last Year** – Shows the data for the past year.
  - **Last 30 Days** – Shows the data for the past 30 days.
  - **Last 90 Days** – Shows the data for the past 90 days.
  - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

Export the Case Report

Procedure

1. On the **Case Priorities** page, click the **Export** menu on the toolbar.
2. On the **Export** menu, select the output format.
3. In the **Export Case Report** dialog box, your file is generated in the selected format.
4. Click the link that appears to open or save the exported file. The file contains all data displayed in the grid at the moment of export regardless of the viewed page. If you apply the filter to the grid, only the filtered data is exported.
5. Click **Close**.

Case Event Breakdown

Navigation

Report & Analyze tab > **Case Reports** tab > **Case Event Breakdown** option.

You can view information about all events that have been performed on the cases, such as adding comments, sending email messages, reassigns, and changing statuses. In addition, you can export the existing cases data into the .CSV, .TSV, and Microsoft Excel file formats.

In the **Case Event Breakdown** grid, the following columnsare available:

- **User** – The user who has performed an event on the case. Only users who have performed any action on the cases appear in the grid.
- **Cases Opened** – The number of cases opened by the corresponding user.
- **Cases On Hold** – The number of cases put on hold by the corresponding user.
- **Cases Closed** – The number of cases closed by the corresponding user.
- **Cases Reassigned** – The number of cases reassigned by the corresponding user.
- **Cases Edited** – The number of cases edited by the corresponding user.
- **Comments Added** – The number of comments added by the corresponding user.
- **Emails Sent** – The number of email messages sent by the corresponding user.

At the bottom of the grid, the **Totals** row appears that totals all values in the corresponding columns.

You can click the column header in the table to sort the results based on the selected column. A sort icon indicates which column is used for sorting. At the bottom of the page, a toolbar enables you to adjust the number of items that displays on one page. You can adjust the number of items that appears on one page. The default number of items per page is **10**. However, you can select up to 100 items to appear on one page. You can also navigate through the pages of items by clicking the scroll arrows at the bottom of the dialog box.

You can define which cases to display on the **Case Event Breakdown** page by using the **Displaying** list. The following options are available:

- **Cases Opened** – Displaying all cases, regardless of their current status.
- **Cases Closed** – Displaying all cases with the **Closed** status.

> When you select another option in the **Segmented by** or **Displaying** list, the case report is regenerated immediately.

Case Report Filtering

> You cannot filter the Case Event Breakdown report data by clicking the value in the grid.

You can filter the case event breakdown to view the information for a specific time period by using the date filter menu. You can apply the following date filters:

- **Date Range** – Define a date range to filter the informationin the **Case Event Breakdown** grid. The following options are available:
  - **None** – Applies no date filter.

  - **Custom** – Shows the data for the date range that you create by yourself. Enter the start date and end date of your custom filter in the corresponding text boxes.
  - **Today** – Shows the data for today.
  - **Current Month** – Shows the data for the current month, no matter the current date.
  - **Current Quarter** – Shows the data for the current three months, no matter the current date.
  - **Current Year** – Shows the data for the current calendar year, no matter the current date.
  - **Year to Date** – Shows the data for the period starting January 1st of the current year up until the current date.
  - **Last Week** – Shows the data for the past week.
  - **Last Month** – Shows the data for the past month.
  - **Last Quarter** – Shows the data for the past three months.
  - **Last Year** – Shows the data for the past year.
  - **Last 30 Days** – Shows the data for the past 30 days.
  - **Last 90 Days** – Shows the data for the past 90 days.
  - **Last 180 Days** – Shows the data for the past 180 days and is selected by default.
- **Start Date** – Enter the start date in the text box manually or by using the calendar icon .
- **End Date** – Enter the end date in the text box manually or by using the calendar icon .
- **Apply** – Save the selected changes.
- **Cancel** – Remove the changes.

For more information about filters, see Case Filters, page 1109 and Case Quick Filters, page 1113.

Export the Case Report

Procedure

1. On the **Case Event Breakdown** page, click the **Export** menu on the toolbar.
2. On the **Export** menu, select the output format.
3. In the **Export Case Report** dialog box, your file is generated in the selected format.
4. Click the link that appears to open or save the exported file. The file contains all data displayed in the grid at the moment of export regardless of the viewed page. If you apply the filter to the grid, only the filtered data is exported.
5. Click **Close**.

Case Reports Scheduled Delivery

Navigation

Report & Analyze tab > **Case Reports** tab > select any report type > click the **Scheduled Report Delivery** button on the selected report toolbar.

You can schedule reports to be delivered regularly to certain users so that they can track case metrics. On the **Schedule Report Delivery** page, you can create the email message, add recipients, select the file format, and schedule the delivery.

The report contains data available at the page at the moment when the email message is scheduled for delivery. If there is an organization hierarchy defined for a workgroup, the report data is scoped to the recipient's organization access. For external emails, the data is scoped according to the task creator's organization access.

Schedule the Case Report Delivery

Procedure

1. Go to the **Case Reports** tab > select any report type. For example, **Case Summaries**.
2. On the **Case Summaries** page toolbar, click the **Scheduled Report Delivery** button.
3. On the **Schedule Report Delivery** page , in the **Select Format** list, select the report format. For the **Case Summaries**, **Case Averages**, **Case Priorities**, and **Case Event Breakdown** reports, the following formats are available:
   - .CSV
   - .TSV
   - .XLSX

   For the **Case Summary Pareto Chart** report, the following formats are available:
   - .PDF
   - .DOCX
   - .PPTX

   If you want to zip the attachment, click the **Zip attachments** check box, and the report in the selected format is attached to the email message in a ZIP archive.
4. In the **To** text box, enter the email address of the recipient.
   You can add multiple addresses separating them by commas or semicolons. You can click the **To** button to select the recipients within the hierarchy if there is an organization hierarchy defined for a workgroup.
5. In the **Case Report Recipients** dialog box, select a check box next to the user or organization, click the right arrow button to add them to the **Recipients** list, and then click **OK**.
6. In the **From** text box, specify the email address from which you want to send your message.
   By default, your email address is selected.
7. In the **Subject** text box, type the message subject.
8. In the email body, type the message text and customize it by using the editing toolbar.
9. To preview your message, click the **Preview** button.
10. To test your message before delivering it to the recipient, click the **Send Test Email** button.

11 Type the test email address in the **Email Address** field, and then click the **Send** button.

In the **Delivery Schedule** section, define the report delivery schedule and the recurrence options. The following options are available:

- **No Scheduling** – Use this option to send your message later. You may want to select it if you have not finished adding recipients, writing your message, or have not yet decided when to send the message. This option removes scheduling.
- **Send Now** – Use this option to send your message immediately. There may be a delay of several minutes before your email is delivered to participants.
- **Send at a specific date and time** – Use this option to specify a date and time when you want to deliver your email. You can either type the date and time manually into the available text field or select the date and time from pop-up menus.

> To specify recurrence options for your message delivery, click the **Show Recurrence Options** link. Use this functionality to send a message multiple times on a daily, weekly, or monthly basis. You can also set an end date or select **No End Date**.

12 Click **Save**.

> When the **Send Now** option is selected in the **Delivery Schedule** section, the **Send Report** button is displayed instead of the **Save** button.

Chapter 32

File Imports

Topics

File imports overview

Navigation

Data Sources tab > **File Imports** tab.

You can enrich your survey respondent data with additional information imported from external sources.

With file imports, you can synchronize data about your survey, comments, and profile respondents in the EFM application with the data from other systems. This way you get a wider range of information about your respondents without having to collect this data via survey, comments, and profile.

Data heading

If a file import has a **Data Heading** selected as **Is Unique**, then after the file import is published, an index is created for this field.

Data types

The following data types can be imported into file imports:

- Text
- Email Address
- Date
- Numeric (Real Number)
- Set (Single Selection)
- Numeric (Whole Number)
- Essay
- Phone Number

You cannot set the **Essay** and **Set (Single Selection)** data types as unique values.

The **Set (Single Selection)** data type represents the **Choose One** question and behaves as the **Choose One** question when used for reporting or filtering.

If you upload a file with the **Phone Number** data type, the system automatically detects the field type based on domestic or international phone patterns. You can set the **Phone Number** data type as unique value.

You can use file imports with profiles.

Data channels

To use the imported data with your survey, comments, and profile you first need to map the file import to the survey, comments, and profile via data channel. This mapping is conducted with the help of the data field that contains unique information about the respondents. You should define the unique data field for your file import before publishing. The type of the unique data field should match the type of the survey and comments **Short Answer** question.

When the respondent replies to your survey, comments, and profile with the response available in the file import unique field, all other information from the file import associated with this respondent becomes available in the **Response Manager** grid. This information can be used for reporting and filtering.

File Imports page

Navigation

Data Sources tab > **File Imports** tab.

Use the **File Imports** page to create a new file import, view information about the existing file imports, open, rename, duplicate, and delete them. On the **File Imports** page, you can view the title, owner of your file import, dates when it was last published or modified, and whether the file import is used in the data channel.

You can also specify how many file imports to display per page by clicking the needed amount in the lower-left part of the **File Imports** page. By default, the file imports are sorted according to the date when they were last modified.

> You can change the column width on the **File Imports** page by dragging the needed column border.

On the **Actions** menu, the following options are available:

- **New** – Click to create a new file import.

> You can also create a new file import by clicking **New** on the toolbar.

- **Rename** – Click to rename the file import. To make this option available, select a check box next to the file import that you want to rename.
- **Delete** – Click to delete the existing file import. To make this option available, select a check box next to the file import that you want to delete.
- **Push to Feedback Intelligence** – Click to update the previously added file imports in Feedback Intelligence.

> Contact a System Administrator to add the file import to Feedback Intelligence. A System Administrator can also enable and disable the **Push to Feedback Intelligence** option for a certain file import.

Create a file import

Navigation

Data Sources tab > **File Imports** tab > click **New**.

You can create a file import.

Procedure

1 On the **File Imports** page, on the toolbar, click **New**.

> You can also click the **Actions** menu > **New**.

2 In the **Name Your File Import** dialog box, type the name of the file import, and then click **OK**.
The **Connection** page opens.

> If you want to return to the **File Imports** grid, click the **Return to File Imports** link.

Managing a file import

Navigation

Data Sources tab > **Speech Analytics** tab > click an existing file import or create a new one by clicking **New** on the toolbar.

After creating a file import, use the following tabs to set up and manage your file import:

- **Connection** – Specify the file to import, select connection type, import method, and test all the settings. For more information, see Set scheduled file import , page 1167.
- **Fields** – Map the fields of the imported file to the correct data type and publish your file import. For more information, see Publish a file import, page 1169.
- **Data** – View, export, filter, and delete the data from your file import.

To use the **Data** tab, you should first publish your file import.

- **Values** – Provide report labels, report values, and export values for the file import fields to use later for reporting, export, and view on the **Response Manager** page. Report labels specified for the Set (Single Selection) fields are displayed on the **Data** tab.
- **Access** – Control access of users and organizations to your file import. You can grant users full access or view access. For more information, see Check for new columns in a file import, page 1172.
- **Data Channels** – Map the imported data to survey or profile to add more attributes to the participant data and use the enriched data for reporting. For more information, see Map a file import to project or profile, page 1174.
- **Triggers** – Create triggers which occur upon the file scheduled import. For more information, see Create a file import trigger, page 1175.

Add data to the file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Connection** page.

You can add information to your survey by importing a file or several files. The data from the imported files are available for data channels.

You can select the data update method in the file import. For more information, see Data update methods, page 1171.

Procedure

1. On the **Connection** page, on the **Connection type** menu, select the **File Upload Import** option.
2. Click the **Select** button, and then choose the file to import.

If you want to select another file, next to the file name, click **Remove**, and select the needed file.

3. Click the **Upload** button.

You can preview the data from the imported files on the **Fields** tab. You can also publish the file import with the data from the uploaded files. For more information about publishing a file import, see Publish a file import, page 1169.

When you import a file for the first time:

- If column value contains more than 255 characters, then the default data type is set to **Essay**.
- If column value contains all **Numeric** with a decimal place or a value that exceeds 2 billion, then the default data type is set to **Numeric (Real Number)**.
- If column value contains all **Numeric** with no decimal place, then the default data type is set to **Numeric (Whole Number)**.
- If column value contains valid date data type, then the default data type is set to **Date**.
- If column value contains valid email address data type, then the default data type is set to **Email Address**.
- If column value contains more than one different value repeated at least 2 times in the first 11 items, then the default data type is set to **Set (Single Selection)**.
- If column value contains valid phone number data type, then the default data type is set to **Phone Number**.
- If column value is empty or not specified, then the default data type is set to **Text**.

Set file upload import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Connection** page > **File Upload Import** connection type.

You can upload a file into the file import and define its import from the selected location. An uploaded file with its data are available for the data channels.

You can add only one file containing a single table into your file import. For the SQL database, the table can include 4,096 columns maximum and for the Oracle database –1,000 columns maximum.

If you want to return to the **File Imports** grid, click the **Return to File Imports** link.

Procedure

1 On the **Connection** page, on the **Connection type** menu, select the **File Upload Import** option.

2 To upload a file from a computer, click **Select**.

3 In the **File Name** text box, select a file that you want to import, and then click **Open**.

The following file formats are valid: .csv, .tsv, .xlsx, .txt, .zip.

4 When file is processed, click **Upload**.
The file is uploaded immediately. You can view the number of records imported, number of records failed, and list any errors which occurred in the dialog box.

5 Go to the **Fields** tab, and then click **Publish**.
On the **Data** tab, data from the uploaded file import appears in the **Data** grid.

6 If you update a previously uploaded file import, go to the **Connection** tab, follow Steps 1-3 to upload the updated file again, and then click **Upload**.
The file is uploaded immediately. You can view the number of new records imported, number of records failed, and list of any errors that occurred in the dialog box.

If there is no new column added to the uploaded file import, you can view the current progress in percent, bytes processed, and total processed data in the dialog box.

If task takes longer, then **Email confirmation is required for processes exceeding** setting, the task continues to run in the background. You can close this window to continue working. A status email is sent to you when the task completes.

If there is a new column added to the uploaded file import, go to the **Fields** tab, and then click **Publish**.

You can use the **File Upload Import** method to upload multiple files and use append or upsert update methods to add more data to the file import (the procedure is similar to how data is appended or upserted for the scheduled file import).

You can use multiple connection types to upload data into a file import. For example, you can start with a scheduled upload for the initial data, and then change to file upload for subsequent data or vice versa.

Set scheduled file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Connection** page > **Schedule File Import** connection type.

On the **Connection** page, you can specify the file to import, schedule its import from the selected location, and test all the settings.

You can add only one file containing a single table into your file import. For the SQL database, the table can include 4,096 columns maximum and for the Oracle database –1,000 columns maximum.

> If you want to return to the **File Imports** grid, click the **Return to File Imports** link.

Procedure

1 On the **Connection** page, on the **Connection** type menu, select the **Schedule File Import** option.

2 On the **Import Method** menu, select the file location:

- **EFM Folder** - if your file is saved in the EFM folder. The path to the EFM folder is the following: {EFM install}AppData\{groupID}\import\{projectID}.

> You should be granted access to the EFM folder or ask your system administrator to place the needed file there.

  If selected, type the name of the file you want to import in the **File Name** box.

> The following file formats are valid: .csv, .tsv, .xlsx, .txt, .zip.

- **SFTP – SSH File Transfer Protocol** – If your file is saved locally. If selected, specify:
  - **Server name** – Name of the server where your file is located.
  - **Port** – Port number for the specified server.
  - **Path** – Path to your file.
  - **File name** – Name of the file to import.
  - **User Name** – Your user name for the specified server.
  - **Password** – Your password for the specified server.

3 Click **Recurrence** to specify:

- Start date of automatic data import from the external file.
- Recurrence of automatic data import from the external file.
- End date of automatic data import from the external file.

> You can check the status of the data import on the **Tasks** tab of the **Administration** tab. You can also view the details of the data import task by clicking the corresponding event in the grid.

4 Click **Save Setup**.

After saving connection setup, file import fields are automatically evaluated and mapped to the corresponding data types (text, email address, date, numeric (real/whole number), set (single selection), essay, or phone number) according to the following rules:

- If 100% of data in the field is composed of email addresses, the field type is marked as **Email Address**.
- If 100% of data in the field is composed of dates, the field type is marked as **Date**.
- If there are certain text data points that repeat in the field, the field type is marked as Set **(Single Selection)**. In other words, if there is more than one text value repeating in less than 11 records, the field is **Set (Single Selection)**.
- If 100% of data in the field is composed of numbers, the field type is marked as **Numeric (Real Number)**.
- If a numeric field looks like numeric with no decimal place, the field type is still marked as **Numeric (Whole Number)**.
- If 100% of data in the field is composed of telephone number, the field type is marked as **Phone Number**.
- If a field is not specified, the field type is marked as **Text**.

> The numeric data type is represented as a floating point number, and its precision is restricted to 15 digits.

5 To test the connection settings, click **Test Settings.**

When the connection is set, you can publish your file import on the **Publish** tab (see Publish a file import, page 1169).

Publish a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Fields** tab.

You can verify the mapping of the imported data fields to the corresponding data types is correct. Make the relevant updates and publish your file import. You can also preview the file import fields in the **Sample Data** grid.

> By default, the first row of the imported file is used for data headings. To use the first row as data, clear the **Use First row for data headings** check box in the **Options** section, and then provide your own data headings in the **Columns** grid.

Procedure

1. In the **Columns** grid, in the **Data Heading** column, verify that your data headings are correct and change if needed.
2. To edit the data heading, in the **Columns** grid, click the **Data Heading** column.
If the **Use first row of file for data headings** check box is cleared, the default data headings are Field1, Field2, and so on.
To save your edits, click outside the text box.

> You can edit data headings only before publishing your file import. After you publish a file import, the **Data Heading** text boxes become unavailable.

3. In the **Columns** grid, in the **Data Type** column, verify the data fields mapping and change it if needed.
4. To define the unique field for your file import, click the corresponding option button in the **Is Unique** column.
Unique field is used to map file import data to a survey and is required to be defined.

> The **Mobile Number** field is compatible with the **Phone Number** data type. You can set a field with the **Phone Number** data type as a unique value.

> Make sure that the mapping done in steps 1 and 2 is correct. After publishing the file import, you cannot change the mapping.

5. Click **Publish**.
After you click **Publish**, the file import is automatically validated for errors.
6. In the **Publish Your File Import Now** dialog box, view the details of the file import, and then click **Publish** if there are no errors or **Cancel** if errors are detected.
    - If 500 or more errors are detected during file import, no rows from your file are imported.
    - If less than 500 errors are detected, only the rows with no errors are imported.
7. To check for new columns in your imported file, in the **Options** section, select the **Check for new columns in the File Import** check box. For more information, see Check for new columns in a file import, page 1172.

8 In the **Data Update Method** list, select the way to update data in the file import. For more information, see Data update methods, page 1171.

> After you publish the file import, the uploaded file is deleted from the EFM folder within the next 24 hours.

Now, you can use your file import to enrich the existing surveys or profiles with the help of data channels. For more information, see Map a file import to project or profile, page 1174.

Data update methods

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Fields** tab.

You can select the method to update data in the published file import.

The file import update is performed automatically according to the file upload import or scheduled import settings specified on the **Connection** tab.

On the **Data Update Method** menu, you can click the following update methods:

- **Append** – Click to ignore data in the imported file when the unique identifier in the imported file matches the unique identifier in the file import. For example, in a file import with several imported columns, email is a unique identifier. When the file is imported according to the scheduled import, the data in columns for rows with matching unique identifiers is not updated.
- **Upsert** – Click to update data in the file import when the unique identifier in the imported file matches the unique identifier in the file import. For example, in a file import with several imported columns, an email is a unique identifier. When the file is imported according to the scheduled import, data in columns for rows with matching unique identifiers is updated.

If the unique identifier in the imported file does not match the unique identifier in the file import, a new row is added to the file import.

Check for new columns in a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Fields** tab > **Check for new columns in the file import** check box.

With the **Check for new columns in the file import** check box selected, each time import is performed (according to the specified scheduled import settings), the application automatically checks if any new columns (fields) have been added to the imported file since last publish.

If there are no new columns added to the imported file, the file import is automatically published.

If there are one or more columns added to the imported file, you receive an email notification about this change asking you to publish the file import.

The new columns appear highlighted in the **Columns** grid on the **Fields** page and they are automatically mapped to the corresponding data types. You need to check the mapping, edit new data headings if needed, and then publish the file import.

> The updated file will not be imported until you click the **Fields** tab > **Publish**.

If the **Check for new columns in the file import** check box is cleared, all the new columns in the imported file are ignored.

> If there are new rows in the file, for the **Append** data update method, only the newly added columns are updated for new rows. For the **Upsert** data update method, all columns are updated for all rows in the file.

Control access to a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Access** tab.

You can define the level of access that the users and organization units can have to your file import. The following options are available:

- **Full Access** – The users can edit the file import.
- **View Access** – The users can only view the file import and map it to their surveys or profiles for enrichment.

> If you want to return to the **File Imports** grid, click the **Return to File Imports** link.

Procedure

1 On the **File Imports** page, click an existing file import or create a new one by clicking **New**.

2 On the **Access** tab, select the check boxes next to the users or organizations that you want to grant access to your file import.

> Only users that have at least **View** permission for file imports are shown on the **Access** page. For more information, see Roles, page 1378.

3 To move the selected user or organization to the **Full Access** or **View Access** box, click the corresponding right arrow button.

> All users assigned to the selected organization and all child organizations will be moved to the selected box on the right. You can move back the users or organizations that you do not want to share the file import access with by selecting the corresponding check boxes, and then clicking the left arrow button.

4 To send the email notification about the file import being published to the users granted access to the file import, select the **Notify Users by Email** check box.

> All users assigned to the selected organization will receive the email notification. Users can access the file import by clicking the link in the email message.

Map a file import to project or profile

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Data Channels** tab.

On the **Data Channels** tab, you can map the file import to a survey, comments, or profile via data channel to add more attributes to the participant data. After adding a file import to a survey or profile, you can use it to view its data in the **Response Manager** grid and to create report elements.

The survey, comments, or profile that you want to map to a file import needs to have at least one **Short Answer** question that matches the data type of the file import unique field.

Before you begin:

- Verify that your file import is published.
- Verify that your survey is open, data for comments is imported, and the profile is published.

Procedure

1. On the **Data Channels** page:
   - To map the file import to a project, click the **Add Project** link.
   - To map the file import to a profile, click the **Add Profile** link.
2. In the **Add Project** or **Add Profile** dialog box correspondingly, select the needed project or profile, and then click **Add**.
3. On the **Matching Project Question**, **Matching Profile Question**, or **Matching Comment Field** menu, click the question that matches the specified data field. The selected question is used to identify the matching record in the file import and update the survey or profile data accordingly.

> If none of the survey or profile questions match the specified data field, the **Matching Project Question**, **Matching Profile Question**, and **Matching Comment Field** menus are unavailable.

4. To save the created data channel, click in the area out of the data channel.
   You cannot edit the data channel anymore.

> To delete the data channel, click the delete icon to the rightmost of the needed data channel. When deleting a data channel, any elements associated with this data channel (report elements, filters, **Response Manager** columns, and others) become unavailable.

Create a file import trigger

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Triggers** tab > **Add Trigger** button.

On the **Triggers** tab, you can create triggers, which occur upon the file scheduled import (see Set scheduled file import , page 1167).
You can trigger the following actions:

- **Create Case**
- **Add Participants to a Survey**
- **Update Profile Fields**

The result of the trigger action depends on the selected data update method (see Data update methods, page 1171).

> To create triggers, first publish your file import.

Procedure

1. On the **Triggers** tab, click the **Add Trigger** button.
2. In the **Add Trigger** dialog box, in the **Description** box, type the name for your trigger.
3. On the **Trigger Action** menu, click the action that you want to be triggered upon the defined criteria are met.
4. To define the trigger criteria, click the **Criteria** tab > **Add Another Criteria** link.
   You can define criteria based on the fields of the current file import only. You can define as many criteria as you need, and then combine them by using the criteria builder advanced options.
5. To proceed with the applied changes, go to the **Fields** tab, and click **Publish**.

> The file import records are checked against the defined criteria only after the next file upload import or scheduled file import.

6. Depending on the action selected in Step 3, follow the corresponding steps below.
   - For the **Create a Case** action:
   a. On the **Case Details** tab, define the details of the case: assign it to the user from your workgroup, specify case priority, title, and description, notify users of this case, and provide contact information of the person who receive the case details in the corresponding boxes.
   b. To add piping support for the file import **Case Triggers**, in the **Case Details** section, on the **Case Descriptions** toolbar, click **Insert Piped Value** icon .
      - In the **Insert Piped Value** dialog box, in the **Fields** section, in the list of published Data Headings, click a field that you want to pipe, and then click **OK**.

For Whole Number, Real Number, Text, Email, Phone Number, and Date, the placeholder for database value is inserted as %[Field1]Q1_1%.

For Essay, the placeholder for database value is inserted as %[Field1]Q1%.

For Set (Single Selection) the placeholder for choice label value is inserted as %[1]Q2LBL%.

- In the **Custom Properties** section > **Insert Piped Value** icon , in the list of question fields (where question type matches type of custom property), click a field that you want to pipe.

When the trigger is executed, the placeholders are replaced with the value or label for the file import record.

c. Click **OK** to save the trigger.
For the records that meet the defined criteria, upon scheduled import, the case is created and its details are sent to the specified contact.

Case triggers are available only if you have a license for the **Case Management** feature.

- For the **Add Participants to a Survey** action:

a. On the **Survey Selection** tab, click the **Add Survey** link.

b. In the **Add Survey** dialog box, select the survey that you want to add participants to, and then click **Add**. You can add multiple surveys.

Only Contact List, Passcode campaign, and SMS surveys that are open are available for selection. Email and Mobile Number data fields are available in the published campaigns, and both data fields can be used for participant creation in triggers.

c. For multiple-campaign surveys, on the **Campaign** menu, select the needed campaign name.

d. On the **Data Field** menu, click the file import field that you want to import the participants from. For **Contact List** and **Panelist** surveys, you can import email addresses (**Email Address**, **Mobile Number**, or **Text** data fields); for SMS surveys, you can import telephone numbers (**Numeric**, **Mobile Number**, or **Text** data fields).

e. To save the trigger, click **OK**.
For the records that meet the defined criteria, the email addresses or telephone numbers from the specified file import field are automatically added to the selected survey(s) as new participants.

For the participants added from file import, you can pipe values from file import fields into question, choice, and topic labels and as preselected answers into **Short Answer**, **Fill in the Blank**, and **Essay** questions (see Pipe values from a file import, page 548).

- For the **Update Profile Fields** action:

a. On the **Profile Fields** tab, click the **Update Profile** link.

b. In the **Update Profile** dialog box, on the **Current Profile** menu, click the profile that you want to update. You can select to update only published profiles.

c. In the grid below, match the file import fields to the corresponding profile fields that you want to update, and then click **Add**. You need to match each file import field to a different profile field or click **Not Selected** on the corresponding menu. You can only update the fields with the responses to **Fill in the Blank**, **Short Answer**, **Essay**, and **Choose One** questions.

> If **Set (Single Selection)** values in the file import do not match **Choose One** question choices in the profile, the **Choose One** question responses show empty fields in the **Response Manager** grid.
>
> If **Set (Single Selection)** includes additional values, which are not among the **Choose One** question choices, these values are ignored upon profile update.

d. On the **Matching Profile Question** menu, click the profile question that matches the data type of the file import unique field. The selected question is used to identify the matching record in the file important update the profile data accordingly. If file import and profile are matched by the **Email Address** data field, the new records are added from the file import to the profile as panelists.

> You can add multiple profiles in scope of a single trigger.
>
> You can view the defined mapping by clicking the profile link on the **Profile Fields** tab.

e. Click **OK** to save the trigger.
For the records that meet the defined criteria, the fields of the selected profile(s) are automatically updated with the corresponding information from the current file import. In addition, if file import unique field is **Email Address** data type, new records are added to the profile(s) as panelists. You can view the updated profile fields and newly added panelists in the **Response Manager** grid and in the **Panelists** grid accordingly.

7 To edit the trigger, click its link on the **Triggers** tab, and then make your changes in the **Edit Trigger** dialog box.

8 To apply the created trigger, on the **Fields** tab, click **Publish**.

Delete a file import

Navigation

Data Sources tab > **File Imports** tab.

You can delete file imports in the **File Imports** grid.

If you delete a file import that is used as a source for piping, then the values that are piped from this file import return no data.

Procedure

1. In the **File Imports** grid, select one or more file imports, and then click **Delete**.

   You can also click the **Actions** menu > **Delete**.

2. In the **Please, type in 'DELETE' and click Delete** box, type **DELETE**, and then click **Delete**.

   Your file import is permanently deleted.

   You cannot delete a file import if it is defined in a data channel. You should first remove all the associated data channels.

Delete a record from a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Data** tab > select a record you want to delete > click the **Delete Record(s)** button.

You can delete a selected record or all selected records from the file import.

Procedure

1 In the **Data** grid, select the check box next to one or more records that you want to delete, and then click the **Delete Record(s)** button on the toolbar.

> You can also click the **Actions** menu > **Delete Record(s)** option.

2 In the **Delete Record(s)** dialog box, click the **Delete Record(s)** button.
Your record is permanently deleted from the file import and any referenced data set.

> You should first delete the record(s) from the source file, otherwise, the record(s) will be added back in the EFM application after the next import recurrence.

Filter a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Data** tab > click the **Filter** button.

You can control what types of information to display in the **Data** grid by defining certain filtering criteria.

> To use the **Data** tab, you should first publish your file import.

Procedure

1. On the **Data** page, on the toolbar, click the **Filter** button.

> The filter option is also available on the **Actions** menu.

2. In the **Filter** dialog box, click the **Add** button or the **Add Filter Criteria** link.
3. In the **Add Filter Criteria** dialog box, select the source file import for your filter.
4. In the corresponding lists, click the field, expression, and value by which you want to filter the data.
5. Click the **Add** button.
   The new filter appears in the **Filter** dialog box.
6. In the **Date Filter** section, on the **Select Date Field** menu, set the filter based on the date when records were submitted or on the fields with **Date** data type.
7. On the **Time Period** menu, select the option from the list to filter the data based on a certain time period.
8. To set the default values for the date filters, click the **Clear Filter** link.
9. To save your changes, click the **Apply Filter** button.

> Export file import options meet all the filtering criteria you set.

When the filtering criteria are applied, a notification describing the current filter appears above the **Data** grid. You can change or cancel the custom filter by clicking the **Edit** or **Clear** link correspondingly.

Export a file import

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Data** tab > click **Export**.

On the **Data** page, you can export your file import to the .csv, .tsv, or .xlsx file formats by clicking the **Export** menu.

> To use the **Data** tab, you should first publish your file import.

Procedure

1 On the **Data** page, on the **Export** menu, click the appropriate file format.
The export file is generated in the selected format.

> Time stamps are exported in your local time zone.

2 In the **Export file import** dialog box, click the link to download the file.

3 Click **Close**.

Push a file import to Feedback Intelligence

Navigation

Data Sources tab > **File Imports** tab > click an existing file import or create a new one > **Actions** menu > **Push to Feedback Intelligence** option.

You can update your file imports in Feedback Intelligence by clicking the **Push to Feedback Intelligence** option. This option is available if your file import is already added to Feedback Intelligence by a System Administrator of your workgroup. The System Administrator can also turn the **Push to Feedback Intelligence** option on or off for a certain file import.

When you update the existing file import in Feedback Intelligence, changes that you made to the file import may affect the previously generated Feedback Intelligence universe, which may change or damage the existing reports.

If you have reports based on this file import, it is recommended that you discuss your file import changes with a support manager before submitting this update.

Procedure

1. On the **File Imports** tab, select the file import that you want to update in Feedback Intelligence.
2. On the **Actions** menu, click **Push to Feedback Intelligence**.
3. In the confirmation dialog box, click **OK**.
   Your file import is marked to be updated in Feedback Intelligence.

Speech Analytics

Speech Analytics integration provides the possibility to retrieve WFO Speech Analytics data into EFM for further analysis and reporting on interaction categories and data fields. Speech Analytics data can be used in data sets, UVoC Module, and Feedback Intelligence for reporting purposes.

Topics

Speech Analytics grid

Navigation

Data Sources tab > **Speech Analytics** tab.

You can create a new Speech Analytics project, view information about the existing Speech Analytics projects, open, rename, and delete them.

On the **Speech Analytics** page, you can view the title, owner of the Speech Analytics project, and dates when it was last published or modified.

> The **Speech Analytics** tab is only available for the workgroups with the Speech Analytics license enabled. To enable the license, contact your System Administrator.

If your Speech Analytics project is added to Feedback Intelligence, click the arrow next to the project name to expand Feedback Intelligence dialog box with details on project responses loading.

You can specify how many Speech Analytics projects to display per page by clicking the needed amount in the lower-left part of the **Speech Analytics** grid. By default, the Speech Analytics projects are sorted according to the date when they were last modified.

> You can change the column width on the **Speech Analytics** page by dragging the needed column border.

On the **Actions** menu, the following options are available:

- **New** – Click to create a new Speech Analytics project.

> You can also create a new Speech Analytics project by clicking **New** on the toolbar.

- **Rename** – Click to rename the Speech Analytics project. To make this option available, select the check box next to the Speech Analytics project that you want to rename.
- **Delete** – Click to delete the existing Speech Analytics project. To make this option available, select the check box next to the Speech Analytics project that you want to delete.
- **Push to Feedback Intelligence** – Click to update the previously added Speech Analytics projects in Feedback Intelligence.

> Contact a System Administrator to add the Speech Analytics project to Feedback Intelligence. A System Administrator can also enable and disable the **Push to Feedback Intelligence** option for a certain Speech Analytics project.

Create Speech Analytics project

Navigation

Data Sources tab > **Speech Analytics** tab > **New** button.

You can create a Speech Analytics project.

Procedure

1 On the **Speech Analytics** page, on the toolbar, click **New**.

> You can also click the **Actions** menu > **New** option.

2 In the **Name Your Speech Analytics Project** dialog box, type the name of the Speech Analytics project, and then click **OK**.

The **Configure** page opens.

> If you want to return to the **Speech Analytics** grid, click the **Return to Speech Analytics** link.

Managing Speech Analytics

Navigation

Data Sources tab > **Speech Analytics** tab > click an existing Speech Analytics project or create a new one by clicking **New** on the toolbar.

After creating a Speech Analytics project, use the following tabs to set up and manage Speech Analytics:

- **Configure** – Select the Speech Analytics project with the configured SFTP settings. When you click **Save Setup**, a new **Import Speech Analytics** task is created with import recurrence every 15 minutes, and project selection is saved to the task settings.

> When you select the Speech Analytics project, and then click **Save Setup**, the list is dimmed with the item selected.

- **Data** – View, export, and filter data, and delete the records from your Speech Analytics project. For more information how to export a Speech Analytics project, go to Export Speech Analytics project, page 1188.

> To use the **Data** tab, you need first to select the Speech Analytics project on the **Configure** tab.

> You need first to delete one or more records from the Speech Analytics source, otherwise, the records will be added back to EFM after the next import recurrence.

- **Values** – Provide the report labels, report values, and export values for the Speech Analytics fields to use later for reporting, export, and view them on the **Response Manager** page. Report labels specified for the Set (Single Selection) fields are displayed on the **Data** tab.

> To review and modify the values, you need first to select the Speech Analytics project on the **Configure** tab.

The Speech Analytics project is published with the following default fields:

- Transaction Id
- Agent Name
- Start Time
- ANI Code
- DNIS Code
- Direction
- Number of Holds
- Total Hold Time (secs)

On the **Data** tab, the **Transaction Id** for each record is a link. If you are not already logged in, by clicking the **Transaction Id** link, you are redirected to the **Login** page in the WFO app. If you are already logged in, you are redirected to the **Interaction Review** page related to the Transaction Id of the selected record.

The Transaction Id links are active, only if the WFO server settings are configured for the workgroup by your System Administrator.

When Speech Analytics data is imported, the data is analyzed for the categories. If the import file has new defined categories, a new category choice is created with the label set to the category name. Then this new choice is added to the **Categories** question, the questionnaire is republished, and the **Speech Analytics** grid is updated with the **Categories** column.

By default all category choices are set to **Not Asked** (null).
If category has a **Rank > 0** for a record, the categories choice is set to selected (1).
If category has **Rank = 0** for a record, the categories choice is set to not selected (0).

Export Speech Analytics project

Navigation

Data Sources tab > **Speech Analytics** tab > click an existing Speech Analytics project or create a new one > **Data** tab > **Export** button.

You can export your Speech Analytics project to the .csv, .tsv, or .xlsx file.

To use the **Data** tab, you should first select the Speech Analytics project on the **Configure** tab.

Procedure

1 On the **Data** page, on the **Export** menu, click the appropriate file format.
The export file is generated in the selected format.

You can also export a Speech Analytics project by clicking the **Actions** menu > **Export** option > the appropriate file format.

Time stamps are exported in your local time zone.

2 In the **Export file import** dialog box, click the link to download the file.

3 Click **Close**.

Delete Speech Analytics project

Navigation

Data Sources tab > **Speech Analytics** tab.

You can delete Speech Analytics projects in the **Speech Analytics** grid.

> If you delete a Speech Analytics project that is used as a source for piping, then the values that are piped from this project return no data.

Procedure

1 In the **Speech Analytics** grid, select one or more Speech Analytics projects, and then click **Delete**.

> You can also click the **Actions** menu > **Delete** option.

2 In the **Please, type in 'DELETE' and click Delete** box, type **DELETE**, and then click **Delete**.
Your Speech Analytics project is permanently deleted.

Push a Speech Analytics project to Feedback Intelligence

Navigation

Data Sources tab > **Speech Analytics** tab > click an existing Speech Analytics project or create a new one > **Actions** menu > **Push to Feedback Intelligence** option.

You can update your Speech Analytics project in Feedback Intelligence by clicking the **Push to Feedback Intelligence** option. This option is available if your Speech Analytics project is already added to Feedback Intelligence by a System Administrator of your workgroup. The System Administrator can also turn the **Push to Feedback Intelligence** option on or off for a certain Speech Analytics project.

> When you update the existing Speech Analytics project in Feedback Intelligence, changes that you made to the Speech Analytics project may affect the previously generated Feedback Intelligence universe, which may change or damage the existing reports.
>
> If you have reports based on this Speech Analytics project, it is recommended that you discuss your Speech Analytics project changes with Support before submitting this update.

Procedure

1. On the **Speech Analytics** tab, select the Speech Analytics project that you want to update in Feedback Intelligence.
2. On the **Actions** menu, click **Push to Feedback Intelligence**.
3. In the confirmation dialog box, click **OK**.
   Your Speech Analytics project is marked to be updated in Feedback Intelligence.

When your Speech Analytics project is added to Feedback Intelligence, in the **Speech Analytics** grid, click the arrow next to the project name to expand Feedback Intelligence dialog box with details on project responses loading.

Chapter 34

Data Sets

Topics

Data sets overview

With data sets, you can combine questions from multiple sources and tie-in contextual information after the data is collected into a single entity for analysis and reporting purposes.

Data points

Data points are fields collected from various sources that can be used for analysis needs. You can add questions from multiple internal and integrated projects such as surveys, profiles, comments, Speech Analytics projects, ForeSee projects, and file imports, and then combine them into a single data set.

You can add different fields from various sources into one project by linking data points of the same type of questions. Otherwise, analysis will produce meaningless results. Make sure you map appropriate data together.

Linked fields

With linked fields, you can combine data points of the same type of questions that are available in different projects into one data set to create a custom report.

For example, if you know the email address of a respondent because that type of question was asked previously in the survey or it is in a panel profile, a linked field will allow you to copy that information to all of the responses from multiple sources. This can be used for further analysis.

With linked fields you can uniquely identify the participants in the combined data. If you want to use results from the **Generate Link** surveys your data set must contain at least one data point that can be linked to a question in the **Generate Link** survey. For example, if you want to link the employee ID both your data set and link survey must have matching fields that can be used to link the data.

Creating data sets process

Navigation

Data Sources tab > **Data Sets** tab.

Data Sets creating process contains the following three-step procedure:

- Creating data sets process, page 1194
- Tie-in linked fields, page 1194
- Publish a data set for reporting, page 1195

Add a data point

Procedure

1. Go to the **Data Sources** tab > **Data Sets** tab, on the toolbar, click the **New** button.
2. In the **Name Your Data Set** dialog box, in the **Data Set Name** text box, type the name of your data set.
3. Click **OK**.
4. On the **Data Points** page, on the toolbar, click the **Add Data Points** button.
5. In the **Add Data Points** dialog box, select the survey, comment, Speech Analytics project, ForeSee projects, profile, or file import, from which you want to add data points.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

6. Select the check box next to the questions that you want to add as data points.
7. Click **Add**.
   The data points are added to the data set.
8. Add an identity question (**Fill in the Blank** or **Short Answer**) as a data point to your data set.

> You can combine and recode data points, change the primary question, and edit report options in the **Edit Data Point** dialog box.

Tie-in linked fields

Procedure

1. Go to the **Data Points** page, on the toolbar, click the **Add Linked Fields** button.
2. In the **Add Linked Fields** dialog box, select the survey, comment, Speech Analytics project, profile, or file import, from which you want to add linked fields.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

3. Select the check box next to the questions that you want to link, and then click **Next**.

4 Select the question that uniquely identifies the respondent in the data source.
5 Select the question that has the matching information in your data set to the linked source identity question.
6 Click **Add**.
The data points are linked.

Publish a data set for reporting

Procedure

1 Go to the **Data Points** page, click the **Publish** button.
2 In the **Publish Your Data Set Now** dialog box, click **Publish**.
The data set is published, and the data points and linked fields are available for reporting.

Data Sets tab

Navigation

Data Sources tab > **Data Sets** tab.

With data sets, you can easily gather and analyze specific information from multiple sources, merge it, and report on it. You can add, duplicate, share, and delete your data sets.

By default, your data sets are sorted by the **Last Modified** column in the **Data Sets** grid. If you want to change how your data sets display in the grid, click a column header (**Title**, **Owner**, **Status**, **Last Populated**, or **Last Modified**). An arrow displays up (ascending) or down (descending) to show the sort order. You can also change a column width by dragging the edge of the column header.

The default number of data sets per page is **10**. However, you can select up to 100 data sets to be displayed on the **Data Sets** page. You can also navigate through the pages of data sets by clicking the scroll arrows at the bottom of the page.

To manage all data sets, select the check box in the upper-left corner of the **Data Sets** page.

On the **Data Sets** page, the following columns are available:

- **Title** – Name of a data set. To edit the data set, click the data set name.
- **Owner** – The user to whom the data set belongs.
- **Status** – The current data set status.
  The following data set status options are available:
  - **Design** – Data set can be edited but is not available for reporting.
  - **Published** – Data set is published for reporting.
  - **Processing** – Data set information is in the update process after publishing.
- **Last Populated** – The last time when the data set was updated or published.
- **Last Modified** – The last time when the data set was changed.

On the toolbar, the following options are available:

- **New** – Create a new data set.
- **Duplicate** – Duplicate the selected data set.
- **Rename** – Change the name of the data set.
- **Share** – Share the selected data set with the other users.
- **Publish** – Publish the data set to make it available for reporting.
- **Delete** – Remove the selected data set.

Data Sets–Role-based access

Navigation

Administration tab > **Roles** tab.

The group and survey administrators can control the workgroup members' ability to view, create, edit, and delete data sets based on the user role set of permissions. You can activate the Data Sets functionality for a user by creating a new role or editing the existing ones on the **Administration** tab > **Roles** tab.

By default, all **Data Sets** permissions are active for the group and survey administrators. Additionally, a **View** access is active for the **Lite Survey Author**, **Restricted Survey Author**, and **Report Author** roles.

Activate Data Sets for a user role

Procedure

1. Go to the **Administration** tab > **Roles** tab, and then click the name of the role that you want to edit.
2. On the **Edit Role** page, define the actions the workgroup member can perform on data sets by selecting the corresponding check boxes in the **View**, **Create**, **Edit**, and **Delete** columns in the **Data Sets** row in the **Survey Administration** section.
   The selection of the **View** check box activates the **Reports** > **Data Sets** tab.
   - **View** – View data sets shared with you by other users.
   - **Create** – Create new data sets.
   - **Edit** – Modify data sets that you have access to.
   - **Delete** – Remove data sets that you have access to.

> When you select the **Create**, **Edit**, or **Delete** check boxes in the **Survey Administration** section, the **View** check box is selected automatically.

3. To let the workgroup member view all data sets in a workgroup regardless of their authorship and sharing status, in the **Administration** section, select the **View All Data Sets** check box.
4. Click **Save**.

Organization scoped data sets

Navigation

Data Sources tab > **Data Sets** tab > **New** button.

You can create organization scoped data sets to share the scoped surveys with other users, allow them to use scoped report elements, and enforce scoping to protect data.

When you add a data point to the data set from an organization scoped survey, the data set becomes an organization scoped data set. Access to results is limited to the report viewers organization scope.

Adding a linked field from an organization scoped survey does not make a data set organization scoped. Access to results is not limited to the organization scope.

You can ensure that your scoped survey is not distributed in a non-scoped way in data sets. When a survey is scoped and you want it to remain scoped, clear the **Allow survey to be linked into data sets** check box. This way you mark the survey as excluded from linked fields. The survey will not be in the list when you add linked fields to the data set. The survey can still be used to add data points to the data set, which retains its scoping.

If you select the **Allow survey to be linked into data sets** check box, the survey can be used when you add linked fields to the data set. Adding a linked field to the data set makes a survey non-scoped.

The **Allow survey to be linked into data sets** check box is available only for the **Organization External ID** and **Employee External ID** library questions in the **Question Options** panel in the survey designer.

Push a data set to Feedback Intelligence

Navigation

Data Sources tab > **Data Sets** tab > select the needed data set > **Actions** menu > **Push to Feedback Intelligence** option.

Before you begin

- Publish the needed data set.

> Data set in the **Design** mode is not available for publishing.

- Contact a System Administrator to add the data set to Feedback Intelligence. A System Administrator can also enable and disable the **Push to Feedback Intelligence** option for a certain data set.

> When you update the existing data set in Feedback Intelligence, changes that you made to the data set may affect the previously generated Feedback Intelligence universe and Tableau data source, which may change or damage the existing reports. If you have reports based on this data set, it is recommended that you discuss your data set changes with a support manager before submitting this update.

You can add and update your data set in Feedback Intelligence for advanced reporting by using the **Push to Feedback Intelligence** option.

> When a data set is added to Feedback Intelligence, the columns on the **Data Sets** > **Responses** grid and the responses from multi-campaign surveys are available in Feedback Intelligence.

You can view and use the following columns for creating report elements in Business Objects and Tableau:

- **Current Data Set**
- **Respondent Fields**
- **Panelists**
- **Profiles**
- **Respondent System Information**
- **Campaign Information**
- **Data Source Information**
- **Respondent Location**

Procedure

1. On the **Data Sets** tab, select the data set that you want to update in Feedback Intelligence.
2. On the **Actions** menu, click the **Push to Feedback Intelligence** option.
3. In the confirmation dialog box, click **OK**.
   Your data set is marked to be updated in Feedback Intelligence.

Create a data set

Navigation

Data Sources tab > **Data Sets** tab > **New** button.

You can name your data set right when you create it. The default name is **Untitled Data Set** followed by the next incremental number, for example, **Untitled Data Set 3**. Naming a data set makes it easier to organize and find your data set later.

Procedure

1. Go to the **Data Sets** tab, on the toolbar, click the **New** button.
2. In the **Name Your Data Set** dialog box, in the **Data Set Name** text box, type the name of a data set.
3. Click **OK**.
   The data set is created in the **Design** mode.

Your next step is to add data points to your data set.

Duplicate a data set

Navigation

Data Sources tab > **Data Sets** tab > **Duplicate** button.

You can manage the report data from different surveys. You can copy an existing data set to create a new one with your custom settings easier and faster.

You can copy shared with you data sets if the edit permission is active for your role.

> You can copy only one data set at a time.

Procedure

1. In the **Data Sets** grid, select the check box next to the data set that you want to copy.
2. On the toolbar, click **Duplicate**.
3. In the **Duplicate a Data Set** dialog box, in the **Data Set Name** field, type a name of the data set.
4. Click **OK**.
   The **Data Points** grid opens with the available data points. The duplicated data set contains the same data points and linked fields that were created in the original data set.

Share a data set

Navigation

Data Sources tab > **Data Sets** tab > **Share** button.

You can manage the report data from different surveys. You can share your data sets with other users and organizations to give them the **View** or the **View and edit** access to your data sets.

The following sharing options are available:

- **View Access** – The users can only view the data set shared with them.
- **Full Access** – The users can view and edit the data set shared with them.

> You can share only one data set at a time and only your own data sets.

The list of users and organizations in the **Share Access** dialog box contains maximum 200 user names. To search for a specific user or organization, use the search box at the top of the list.

You can also view data sets shared with you by other users. The shared with you data set appears among your data sets. The name of the user who shared a data set with you is shown in the the **Data Sets** grid > **Owner** column. If you have the **View** access to the shared data set, all edit buttons will be disabled for the current data set.

Procedure

1. In the **Data Sets** grid, select the check box next to the data set that you want to share.
2. On the toolbar, click **Share**.
3. In the **Share Access** dialog box, with the list of users and organizations displayed, select a check box next to the user or an organization, and then click the right arrow to move them to the **Full Access** or **View Access** box.

> All users assigned to the selected organization as well as all child organizations will be moved to the selected right box too. You can move back the users or organizations you do not want to share the data set with, by selecting the corresponding check boxes and clicking the left arrows button.

4. To send the email notification to the users allowed to view or edit the data set, select the **Notify Usersby Email** check box.
   The check box is selected by default.

> All users assigned to the selected organization will receive the email notification of the data set being shared with them.

5. Click **OK**.
6. In the **Notify Users** dialog box, edit your email notification, and then click **OK**.

> The **Notify Users** dialog box opens only when the **Notify Users by Email** check box is selected.

Stop sharing a data set

Procedure

1. In the **Data Sets** grid, select the check box next to the previously shared data set.
2. On the toolbar, click **Share**.
3. In the **Share Access** dialog box opens, in the **Full Access** or **View Access** box, select the user with whom you want to stop sharing the data set.
4. Click the left double arrows button to move the selected user to the **Users** box.
5. Click **OK**.
   The data set is no longer available for the user.

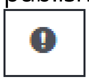
Publish a data set

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Publish** button.

After creating a data set, you need to publish it to make it available for further reporting. When your data set is published, its editing is restricted. The data points and linked fields become available for reporting. The **Publish** button is renamed to **Republish** and becomes unavailable.

You can view the last time data was updated to track all changes in your report. The exact time of the update is displayed on the **Data Points** page > **Data Last Populated** status. If the data set is not updated yet, the **Pending** status is displayed. When the data set is in the update process, the **Data Last Populated** status is set to **Processing**.

If you want to edit your data set after publishing, for example, add a new data point or combine it with a published one, you need to republish the data set after making all the changes. The **Unpublished** icon  appears in front of the unpublished data point. Click **Republish** to make the updated data available for reporting.

Your data set is automatically validated for any errors before publishing.

If there are no errors, the **No problems were detected with your data set** message appears.

You can also view a number of rows to be processed for this data set after publishing.

Procedure

1. In the **Data Sets** grid, click the name of the data set that you want to publish.
2. In the **Data Points** page, on the toolbar, click the **Publish** button.
3. In the **Publish Your Data Set Now** dialog box, check your data set for the listed issues (if any).
4. Click **Publish**.
   The data set is published, and the data points and linked fields are available for reporting.

Data set update frequency

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Update Frequency** menu.

When your data set is published, it needs to be updated with the new responses or any changes in your surveys to provide accurate report information.

You can set the frequency of your data set updates with the following options:

- **Daily**
- **Weekly**
- **Every 12 hours**
- **Never**

By default, the frequency of the update is set to **Daily**. You can change it to **Weekly**, **Every 12 hours**, or to **Never** by clicking the needed option on the **Update Frequency** menu.

If you create a data set for one-time use only and do not need the updates for it, you can set the update frequency to **Never**. You can also change it any time you like.

You can view the last time the data was updated to track all changes in your report. The exact time of the update is displayed on the **Data Points** page > **Data Last Populated** status. If the data set is not updated yet, the **Pending** status is displayed. When the data set is in the update process, the **Data Last Populated** status is set to **Processing**.

Only data sets that have new or modified data will be processed.

If your data set is not updated or used by Feedback Intelligence for more than 30 days, the data set is not updated anymore.

Report elements status messages

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or open an existing one that contains data set information.

You can view the data set updates information for the report elements that are based on the data sets.

Data is unavailable in a report element based on data set information in the following cases:

- Filters that filter out all the data are applied.
- The data is not processed yet.

When you publish or republish the data set, it takes some time for the report elements to be updated. In such case, the **No Data Available** message appears for the report element body. Additionally, the following message appears at the top of the report element:

The requested data is being recompiled from scratch. This may take some time. Thank you for your patience.

If the data set is in the **Processing** status, it takes some time for the report elements based on the data set to be updated. In such case, the message is the following:

Processing, please check back shortly.

If the data points that are used in your report elements have new answers, the report element shows the existing answers in the report element and the message is the following:

Additional responses have been received but are pending processing. Chart will be updated shortly.

Validate a data set

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Actions** menu > **Validate** option.

You can check your data set for any errors and fix them before publishing the data set. The following information is available:

- Data points that should be recoded.
  These are data points where you need to map similar data together, fix reversed scales, or adapt slightly mismatched questions.
- Items that have sparse data.
  These are data points and linked fields where you need to provide the missing information. You can view the list of the missing items in the dialog box.

If there are no errors, the **No problems were detected with your data set** message appears.

You can also view a number of rows to be processed for this data set after publishing. Once your data set is published, its editing is restricted. The data points and linked fields become available for reporting.

Procedure

1. On the **Data Points** page, on the **Actions** menu, click **Validate**.
2. In the **Validate Data Set** dialog box, check your data set for the listed issues (if any).
3. Click **Close**.

Delete a data set

Navigation

Data Sources tab > **Data Sets** tab > **Delete** button.

You can delete data sets that you do not need any more. If you delete a data set, the **Data No Longer Available** notification appears for the report elements using this data set. You can delete multiple data sets at a time.

Procedure

1. On the **Data Sets** tab, select the check box next to the data set that you want to delete.
2. On the toolbar, click the **Delete** button.
3. In the confirmation dialog box, click **Delete**.
   The data set is deleted.

Data Points overview

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page.

After creating the data set, you need to add data points to it.

Data points are fields collected from various sources, such as surveys, profiles, comments, Speech Analytics projects, and file imports, that can be used for reporting and analysis purposes. You can add, edit, combine, publish, and delete data points for the specific data set.

You also need to add an identity data point into your data set so that respondents can be tied to the linked fields. Identity data point is a question in your data set that holds unique identifying information about your respondents. Only the **Fill in the Blank** and **Short Answer** type of questions can be set as an identity data point.

The **Data Points** page provides you information on each data point and linked field that you created. You can identify the linked field by the **Linked Field** icon before its title. The updated data point that should be republished for reporting is marked by the **Warning** icon before its title. You can sort data points and linked fields by clicking the column heading. To change the width of a column, drag its edge.

To manage all items, select the check box in the upper-left corner on the **Data Points** page.

On the **Data Points** page, the following columns are available:

- **Icon** – The updated data point that should be republished for reporting and the linked fields are marked by icons in this column.
- **Title** – Question heading plus the question text, separated by a period. To edit the item, click the title.
- **Data Format** – Question type of the question.
- **Data Source** – Survey, profile, comment, Speech Analytics project, ForeSee projects, or file import that the question is taken from. If data point consists of more than one column, it has the **Source N** name with all the sources listed. **N** is the number of columns that are combined together in the data point.

On the toolbar, you can see the following options:

- **Actions** – On the menu, the following options are available:
  - **Add Data Points** – Add questions from multiple internal and integrated projects such as surveys, profiles, comments, Speech Analytics projects, ForeSee projects, and file imports, and then combine them into a single data set.
  - **Add Linked Fields** – Combine data points of the same type of questions that are available in different projects into one data set to create a custom report.
  - **Validate** – Check your data set for any errors.
  - **Publish** – Publish the data set to make it available for reporting.
  - **Delete** – Delete the selected data point.

If you do not have permission to edit data sets, only the **Validate** option is active on the **Actions** menu.

Add a data point to data set

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button.

You can add data points to the data set from a survey, comment, file import, Speech Analytics project, ForeSee project, or profile. You can use all surveys, comments, file imports, Speech Analytics projects, ForeSee projects, and profiles you have access to, including the **My Surveys**, **Comments**, **File Imports**, **Shared Surveys**, **Other Users' Surveys**, **Speech Analytics**, **ForeSee**, and **Profiles** folders. Surveys and profiles in the **Design** or **Test** mode are not shown. You can only add questions that are published in the open survey.

You can add all question types as data points, but not such content as text, code blocks, or sections. An identity data point can be a **Fill in the Blank** or **Short Answer** type of questions only.

Procedure

1. On the **Data Points** tab, on the toolbar, click the **Add Data Points** button.
2. In the **Add Data Point** dialog box, select the survey, comment, profile, Speech Analytics project, or file import, from which you want to add data points. The list of questions from the selected source appears in the **Questions** box. Hover over the question to preview it.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

3. To search for the specific survey, comment, profile, Speech Analytics project, or file import, type a partial or whole project name in the search box, and then click the **Search** button. The list of surveys, profiles, comments, Speech Analytics projects, ForeSee projects, or file imports that match your input displays.
4. Select the check box next to the questions that you want to add as data points.
When you add data points from the multi-campaign survey, the system fields from all campaign types in the survey are available for the selection. The following campaign specific system fields are available:
   - **Panelist ID**, **Email**, and **Mobile Number** (for **Panelist** campaign)
   - **Email** and **Mobile Number** (for **Contact List** campaign)
   - **Email** (for **Passcode** campaign and comments)

> The **Mobile Number** system field is available, only if SMS Surveys feature is enabled for the wokgroup.

> Questions that are already added to the data set are inactive in the dialog box.

5. Click **Add**.
The data point is added to the data set.
6. Repeat the steps to add more data points. Add an identity data point, which is a **Fill in the Blank** or **Short Answer** types of question that holds unique identifying information about your respondents.

After that you can add linked fields and set the identity data point for your data set.

Add and remove an identity data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button.

To combine projects for custom reporting you need to add an identity data point to your data set. An identity data point uniquely identifies the respondent in the data source. Only **Fill in the Blank** or **Short Answer** type of questions can be set as an identity data point.

You need to add an identity data point while adding other data points to your data set to tie respondents to the linked fields later. Only then you can link questions from a different survey. The **Add Linked Fields** button on the toolbar is only available if the identity data point is added to the data set.

For the **Invite Panelists** surveys, the identity information list contains Panelist ID, email, and mobile information. For the **Create a List** survey, list contains email and mobile information. For the **Require a Passcode** survey and comments, the list contains only email information.

> The mobile information is available, only if SMS Surveys feature is enabled for the workgroup.

If you delete an identity data point, the linked fields in your data set are also deleted. You can add them again after choosing a new identity data point.

When you delete an identity data point, all report elements and filters that included the deleted identity data point are deleted too.

Add an identity data point to a data set

Procedure

1. On the **Data Points** tab, on the toolbar, click the **Add Data Points** button.
2. In the **Add Data Point** dialog box, select the survey, comment, profile, Speech Analytics project, or file import, from which you want to add an identity data point.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

3. To search for the specific survey, comment, profile, Speech Analytics project, or file import, type a partial or whole project name in the search box, and then click the **Search** button. The list of surveys, profiles, comments, Speech Analytics project, ForeSee project, or file imports that match your input displays.
4. Select the check box next to the **Fill in the Blank** or **Short Answer** type of questions that you want to add as an identity data point.

> Questions that are already added to the data set are inactive in the dialog box.

5. Click **Add**.
The identity data point is added to the data set.

Delete an identity data point

Procedure

1. On the **Data Points** page, select the check box next to the identity data point that you want to delete.
   Identity data point is highlighted in gray in the grid.
2. On the toolbar, click **Delete**.
3. In the confirmation dialog box opens, click **Delete**.

Add linked fields

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Linked Fields** button.

With linked fields, you can combine data points of the same type of questions that are available in different projects into one data set to create a custom report. The surveys, profiles, comments, Speech Analytics projects, and file imports that you want to combine need to have identity questions. These are the **Fill in the Blank** or **Short Answer** type of questions that uniquely identify the respondent in the data source. Only surveys that contain the **Fill in the Blank** or **Short Answer** type of questions are shown to the user in the **Linked Questions** box > **Add Linked Fields** dialog box.

You can use all surveys, comments, file imports, and profiles you have access to, including the **My Surveys**, **Comments**, **File Imports**, **Shared Surveys**, **Other Users' Surveys**, **Speech Analytics**, and **Profiles** folders. Surveys and profiles in the **Design** or **Test** mode are not shown. You can only add questions that are published in an open survey.

You need to add an identity data point while adding other data points to your data set so that respondents can be tied to the linked fields. Only then you can link questions from a different data source. The **Add Linked Fields** button on the toolbar is only available if the identity data point is added to the data set.

For the **Invite Panelists** surveys, the identity information list contains Panelist ID, email, and mobile information. For the **Create a List** surevy, list contains email and mobile information. For the **Require a Passcode** survey and comments, the list contains only email information.

The mobile information is available, only if SMS Surveys feature is enabled for the workgroup.

Connecting linked source

After selecting the data points that you want to link, you need to set the question that identifies the respondent in the survey that you want to link and the matching data point in your data set.

The **Which question uniquely identifies a respondent in this data source** list contains all **Fill in the Blank** or **Short Answer** questions from the survey or comment that you want to link. The identity question that you use more often is selected automatically. This question is called Linked Source Identity Question. If the published data set contains linked fields for a particular project, you cannot change the Linked Source Identity Question for that project.

The **Which data point in your data set has matching information in it** list contains all **Fill in the Blank** or **Short Answer** questions from your data set. This question is called **Data Set Identity Question**. If the published data set contains linked fields, you cannot change the **Data Set Identity Question**.

If your data set already contains linked fields and you want to add more linked fields from other sources, the **Which data point in your data set has matching information in it** list becomes unavailable for editing. You do not need to edit it to add all other linked fields.

You need to republish the data set after adding linked fields to update it for reporting.

Procedure

1 On the **Data Points** page, on the toolbar, click the **Add Linked Fields** button.

2 In the **Add Linked Fields** dialog box, select the survey, comment, profile, Speech Analytics project, or file import, from which you want to add linked fields.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

3 To search for the specific survey, comment card, profile, Speech Analytics project, or file import, type a partial or whole project name in the search box, and then click the **Search** button. The list of surveys, profiles, comments, Speech Analytics projects, or file imports that match your input displays.

4 Select the check box next to the question you want to link.
The system fields from all campaign types in the survey are available for the selection, if they match the linked source identity question.

> Questions that are already added to the data set are inactive in the dialog box.

5 Click **Next**.

6 Select the question that uniquely identifies the respondent in the data source.

7 Select the question that has the matching information in your data set to the linked source identity question.

8 Click **Add**.
The data points are linked.

Combine a data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box > **Combine Data Point** button.

You can combine data points from one source with data points from another source in one data set to create a custom report.

To combine similar questions from various sources, you need to select questions, which have the same question type. For example, if your primary question is a choice question (**Choose One, Choose Many**, **Choose One with Image or Choose Many with Image**), the combined question you can choose is the same choice question. If it is a **Fill in the Blank** question type, then the combined questions need to have the same number of topics and the same data type (text, number, date, etc.). For the matrix questions, the data points that you want to combine need to have the same number of rows, table sides, and the same data type for **Fill in the Blank**.

You can use all surveys, comment cards, file imports, and profiles that you have access to, including the **My Surveys**, **Comments**, **File Imports**, **Shared Surveys**, **Other Users' Surveys**, **Speech Analytics**, **ForeSee**, and **Profiles** folders. Surveys and profiles in the **Design** or **Test** mode are not shown. You can only add questions that are published in an open survey. You can add all question types as data points, but not such content as text, code blocks, or sections.

You need to republish the data set after combining data points to update it for reporting.

Procedure

1. On the **Data Points** page, click the data point that you want to combine with another data point.
2. In the **Edit Data Point** dialog box, on the toolbar, click the **Combine Data Point** button.
3. Select the survey, comment, profile, Speech Analytics project, ForeSee project, or file import, from which you want to add a data point to the primary data point.

> Questions that are already added to the data set are inactive in the dialog box.

4. To search for the specific survey, comment, profile, Speech Analytics project, ForeSee project, or file import, type a partial or whole project name in the search box, and then click the **Search** button. The list of surveys, profiles, comments, Speech Analytics projects, ForeSee projects, or file imports that match your input displays.

> Surveys and profiles in the **Design** or **Test** mode are not shown. Only published file imports are available in the **File Imports** folder.

5. Select the question that you want to combine with your previously added data point.
   The system fields from all campaign types in the survey are available for the selection, if they match the data type of the selected data point. The following campaign specific system fields are available:
   - **Panelist ID**, **Email**, and **Mobile Number** (for **Panelist** campaign)
   - **Email** and **Mobile Number** (for **Contact List** campaign)
   - **Email** (for **Passcode** campaign and comments)

The **Mobile Number** system field is available, only if SMS Surveys feature is enabled for the wokgroup.

You can select only one question at a time.

6 Click **Add**.
The data point is added to the primary data point.

7 Repeat the steps to combine more data points with the primary data point.

You can also recode response options in your combined data points.

Change primary question in a data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box > **Combine Data Point** button.

The question with which you combine other questions in your data point is called a primary question. You need to set a primary question for your data point to map all other question responses in your data point to that question for recoding. You can change data point primary question once you combine different questions in the data point. The primary question is highlighted in gray and marked with the **Star** icon . You cannot delete a primary question.

By default, the first question in the data points is set as a primary question.

If you recode questions in your data point, and then want to change the primary question, you need to recode the questions again.

If you change the primary question after the data set is published, all other questions in the data point are indicated with the **Warning** icon . You need to republish the data set after changing the primary question to update it for reporting.

Procedure

1. In the **Edit Data Point** dialog box, combine the questions in your data point with the primary question.
2. Select the check box next to the question that you want to set as primary.

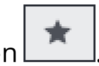
   If you change the primary question, all the recoding you previously set is lost.

3. On the toolbar, click the **Set as Primary** button on the toolbar. The question becomes highlighted in gray and is marked with the **Star** icon .

Delete a combined data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box > **Delete** button.

You can delete combined data points that you do not need anymore. You can also delete multiple combined data points at a time. You cannot delete the primary data point, to which you combine all the other data points. The primary data point is marked with the **Star** icon .
After deleting combined data points, you need to republish the data set to update it for reporting.

Procedure

1. On the **Data Point**s page, click the data point that you want to edit.
2. In the **Edit Data Points** dialog box, select the check box next to the data point that you want to delete.
3. On the toolbar, click **Delete**.
4. In the confirmation dialog box opens, click **Delete**.

Delete a data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box > **Delete** button.

You can delete data points and linked fields that you do not need anymore. You can also delete multiple data points and linked fields at a time. After deleting data points or linked fields, you need to republish the data set to update it for reporting. If you delete the identity data point, the linked fields in your data set are also deleted. You can add them again after choosing a new identity data point.

When you delete a data point, all report elements and filters that included the deleted data point are deleted too.

Procedure

1. On the **Data Points** page, select the check box next to the data point or linked field that you want to delete.
2. On the toolbar, click **Delete**.
3. In the confirmation dialog box, click **Delete**.

Edit a data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box.

You can make the following changes to the data point:

- Add more questions to the data point or remove questions from it.
- Set a primary question for your data point to map all other questions' responses in your data point to that question for recoding.
- Set the report labels for a data point ahead of time to keep the labels consistent when you use the data in reporting.
- Recode questions combined together to fix reversed scales or adapt slightly mismatched questions.

You can view the following information on the data point for the reference:

- **Data Type** – Question type of the data point.
- **Icons** – The **Star** icon indicates the primary question. The **Warning** icon indicates the question thatis added to the data point but is not published yet.
- **Title** – Question heading plus the question text, separated by a period.
- **Source** – Survey or profile that the question is from.

Procedure

1. On the **Data Points** page, click the data point name that you want to edit.
2. In the **Edit Data Point** dialog box with all questions that compose your data point, in the **Title** field, edit the data point name.
3. To add more questions to the data point, click the **Combine Data Point** button.
4. To delete a question, select the check box next to the question that you want to remove, and then click the **Delete** button.
5. To change a primary question, select the check box next to the question that you want to set as primary, and then click the **Set as Primary** button.

   The **Star** icon indicates the primary question.
6. To edit the settings used when reporting on the data point, click the **Report Options** button.
7. Fix the mismatched questions by using the **Recode** button.
8. Click **Close**.
   Your changes are saved.

> If you do not have permission to edit data sets, all functionality in the **Edit Data Point** dialog box is inactive.

Edit linked fields

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box.

You can edit the title for your linked fields to identify them easier later.

You can view the **Title**, **Data Type**, **Linked Source Identity Question**, and the **Data Set Identity Question** boxes in the **Edit Linked Field** dialog box. The data type shows the question type of the linked field and is not editable.

The **Linked Source Identity Question** list contains all the **Fill in the Blank** or **Short Answer** type of questions from the survey that you want to link to your data set. The **Data Set Identity Question** list contains all the **Fill in the Blank** or **Short Answer** type of questions from your data set.

When the data set is published, you cannot edit the **Linked Source Identity Question** and the **Data Set Identity Question** information. Also if an unpublished data set contains linked fields from multiple projects, the **Data Set Identity Question** cannot be changed. To change it, you need to delete linked fields to have one linked source again.

Procedure

1. In the **Data Points** grid, click the name of the linked field that you want to edit.
2. In the **Edit Linked Field** dialog box, in the **Title** box, change the name of the linked field.
3. In the **Linked Source Identity Question** list, select the question that you want to set as an identity question in your data source.
4. In the **Data Set Identity Question** list, select the question that you want to set as an identity question in your data set.
5. To save the changes, click **Save**.

Edit report labels and values

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > **Add Data Points** button > click the data point name > **Edit Data Point** dialog box > **Report Options** button.

You can set the report labels for a data point ahead of time to keep the labels consistent when you use the data in reporting.

You can edit the report labels for the following question types:

- Choose One
- Choose One with Image
- Choose Many
- Choose Many with Image
- Fill in the Blank
- Short Answer
- Matrix with the Choose One and Choose Many sides

For the **Choose One** questions and the **Choose One** sides in the **Matrix** question, you can change the report and export values. For the **Choose Many** questions and the **Choose Many** sides in the **Matrix** question, you can change the export values.

When the export or report value is set for a choice, it is displayed instead of the choice index in the survey designer and is used as an identifier for the choice.

The following order of priority determines what value is displayed to the left of the choice:

- **Export Value** (if set)
- **Report Value** (if set)
- **Choice Index**

For example, if both export and report values are set to the choice, the export value will be displayed.

You can view a row for each response in a question. The ghost text shows the response labels and values that are used in the original question.

When you change the labels, labels that appear in the reporting are changed when this data point is used. It also changes the labels in the **Recode Data** dialog box accordingly. When you change the report values, it updates the calculations in report elements that use this data point. When you change the export values, it updates the exported values when you export the responses from this data point.

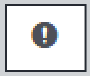
Procedure

1. On the **Data Points** page, click the data point name that you want to edit.
2. In the **Edit Data Point** dialog box, on the toolbar, click the **Report Options** button.
   The **Edit Report Options** dialog box opens.
3. In the **Question Heading** text box, edit the question heading.
4. In the **Question Text** text box, edit the question text.

For the **Matrix** question, you can switch between the topics and sides by clicking the **Matrix Section** list. When you switch between the sides, all changes are remembered.

5 In the **Report Label** section, edit the response text in the corresponding row.

6 In the **Report Value** section, edit the report value in the corresponding row.

You can enter positive whole or decimal numbers for the report values. If you enter an invalid value, the warning icon  appears and an invalid value is reverted to an original one.

7 In the **Export Value** section, edit the export value in the corresponding row.

You can use the **Reset** button to set all labels and values to the original labels and values. The **Reset Side** button in Matrix resets the currently selected side only.

8 Click **Save**.

9 Click **Close**.

Recode a data point

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Data Points** page > click a previously combined data point > **Edit Data Point** dialog box > **Recode** button.

You can recode questions that have been combined together in one data point to map similar data together, fix reversed scales, or adapt slightly mismatched questions.

You can recode the following question types:

- Choose One
- Choose One with Image
- Choose Many
- Choose Many with Image
- Matrix with the Choose One and Choose Many sides

For **Choose One** and **Choose Many** questions, you can also recode the **Please Specify** text. The response with the **Please Specify** text is marked with an icon.

When you click the **Recode** button, the **Recode Data** dialog box opens, showing the following columns:

- **Title** – The title of the questions combined in one data point.
- **Source** – The data source that contains the corresponding question.
- **Raw Label** – The original label of the question choice.
- **Report Label** – The question choice label, which will be used for the data set. If you do not edit the report options, the original labels are used by default.

In the dialog box, the choices of the combined data points are displayed. The primary data point choices are in yellow and are not editable.

For the **Matrix** questions, you can select the side for data recoding in the **Matrix Section** list.

The list of primary data point choices appears to the right of each choice of the secondary data point. By default, the choices of secondary data point are set to the matching options of primary data point. For the secondary data point choices that do not match the primary data point choices, the **Not Set** option is selected.

The data recoding does not impact the data present in the original source of the data point.

Procedure

1. On the **Data Points** page, click the data point that you want to edit.
2. In the **Edit Data Point** dialog box, on the toolbar, click **Recode**.
3. In the **Recode Data** dialog box, in the **Matrix Section** list, select the **Matrix** question side that you want to recode.
   Your mapping is saved when you switch between the sides.

> This option is available only for the **Matrix** questions.

4. In the **Report Label** column, map the secondary data point choices to the primary data point choices by using the list to the right of each secondary data point choice.

For the **Choose Many** questions, you can not select the same choice multiple times.

5 To set all your data mappings to the original values, click **Reset**.
The **Reset Side** button in **Matrix** resets the currently selected side only.

6 After mapping all choices, click **Save**.

7 Click **Close**.

Responses grid

Navigation

Data Sources tab > **Data Sets** tab > create a new data set or open an existing one > **Responses** tab.

You can view, export, and filter your data set responses. Responses are available after publishing or republishing the data set.

You can view the last time the data was updated to track all changes in your responses. The exact time of the update is displayed on the **Responses** page > **Data Last Populated** status. If the data set is not updated yet, the **Pending** status is displayed.

By default, the **Responses** grid displays the response data of 10 respondents, the dates they started and completed your survey, branched out and over quota dates, and the date you last modified their response data.

In addition, if your **Responses** grid is greater than one page in length, you can navigate between pages by clicking the page navigation arrows in the **Responses** grid.

In the **Responses** grid, click the **Frequency Chart** icon  to view the **Frequency Chart** that displays both the number and the percentage of respondents who answered the specified question.

Actions

The **Actions** menu provides you a number of options to customize your view of the **Responses** grid, filter responses, export responses, and more.
The **Actions** menu includes the following options:

- View Data Type
- Columns
- Filter
- Clear All Filters
- Export
- Export Selected Responses to PDF

Some options may appear dimmed on the **Actions** menu if no respondents are selected.

View Data Type

By clicking the **Actions** menu > **View Data Type**, you can specify what type of data you want to view in the **Responses** grid.

The following options are available:

- **Raw Data** – Displays numeric values associated with responses.
- **Choice Labels** – Displays text associated with responses.
- **Export Values** – Displays values that you define in your survey.
  For example, if you want to display negative numbers in the **Responses** grid, specify this in the survey, and display it in the **Responses** grid.

- **Report Values** – Displays values that you define in your report.

Columns

By clicking the **Actions** menu > **Columns** or the **Columns** button on the toolbar, you can specify which columns you want to display in the **Responses** grid. You can exclude the responses that you do not need in your report and include the respondent information that you want to use for reporting. For example, you can hide the **Started** survey date and display your respondents' **Completed** survey date.

You can add the following columns:

- **Current Project** – Lists the questions from the current project.
- **Respondent Fields**
  - **Record ID** – Shows the unique ID number of the record.
  - **Preferred Contact Method** – Shows the specified contact method information (**Email** or **Mobile Number**) for **Contact List** and **Panelist** campaigns.

> The mobile information is available only if SMS Surveys feature is enabled for the workgroup.

  - **Campaign Name** – Shows the name of a campaign.
  - **Campaign Type** – Shows the name of a distribution type.
  - **Started** – Shows the date a respondent started the survey.
  - **Completed** – Shows the date a respondent completed the survey.
  - **Branched Out** – Shows the date a respondent was branched out of the survey.
  - **Over Quota** – Shows the date a respondent reached the over quota limit.
  - **Last Modified** – Shows the date when the survey was last modified.
  - **Campaign Status** – Shows the campaign status, which is calculated only for the surveys that are in the **Open** or **Closed** status. There are the following campaign statuses: **Sent**, **Confirmed Received**, **Started**, **Undeliverable**, **Completed**, **Bounced Back**, **Unsubscribed**, **Branched Out**, and **Over Quota**.
  - **Culture** – Shows the language culture that is used for the survey.
  - **Last Page** – Shows the last page that the respondent visited.
  - **Response Source** – Identifies where the survey response is coming from, for example, from intercept, mobile, or panel.
  - **Source Type** – Shows the type of a source used to add participants, for example, manual entry, file, Web Service, active directory, survey, and so on.
  - **Task ID** – Shows the unique ID number of the task.
  - **Occurrence** – Shows the number of task occurrences.
  - **Referring URL** – Tracks what triggered the intercept that the response is tied to.
  - **Web Browser’s User Agent** – Shows the user agent of a web browser.
  - **Respondent’s IP Address** – Shows the IP address of a respondent.
  - **Respondent’s Hostname** – Shows the host name of a respondent.
  - **Data Source** – Shows the name of the project that the response originated from and is consistent with the values shown in the **Data Source** column in the **Data Points** grid. When

applying a filter, the **Data Source** is available in the **Participant Information** section where the **Value** text box contains a list of project names for each data source used within the data set. If data point consists of more than one column, it has the **Source N** name with all the sources listed. **N** is the number of columns that are combined together in the data point.

- **Key 1/ Key 2 / Key 3** – Shows the **Require a Passcode** data in the column.

> When the comment and survey fields exist in a single data set, the **User Key 1 / OL ElasticSearch Id** column is displayed in the **Responses** grid.
>
> When only a comment is available in the data set, the **OL ElasticSearch Id** column is displayed in the **Responses** grid.

- **Panelists**
  - Panelist ID
  - First Name
  - Last Name
  - Address 1
  - Address 2
  - City
  - State/Province
  - ZIP/Postal Code
  - Country
  - Phone Number
  - Preferred Contact Method
  - Panelist Culture
  - External ID
  - Health Score
  - Is Subscribed
  - Status
- **Respondent System Information**
  - Record ID
  - Browser Family
  - Browser Version
  - Operating System Family
  - Operating System Name
  - Device Type
- **Respondent Location**
  - City
  - State/Province
  - ZIP/Postal Code
  - Country
  - Latitude

- Longitude

Filter

By clicking the **Actions** menu > **Filter** or the **Filter** button on the toolbar, you can control what types of information to display in the **Responses** grid by defining custom filtering criteria. For example, you can exclude all responses that are larger than a certain value.

In the **Add Filter Criteria** dialog box, in the **Source** list, data from the current project, columns, and profiles are available for defining the filtering criteria.

If data set contains at least one data point from a multi-campaign survey, you can add filtering criteria by **Campaign Name** and **Campaign Type** in the **Participant Information** source.

If you select **Campaign Name** as a filtering field, text value field is available for input.

If you select **Campaign Type** as a filtering field, value list is available with all possible campaign types within all data set survey sources.

If you apply filtering by **Campaign Name** and/or **Campaign Type**, response data is available according to this filtering criteria.

Clear All Filters

By clicking the **Actions** menu > **Clear All Filters** option, you can remove any filter from the **Responses** grid. This means that responses will be displayed in the **Responses** grid based on the default view.

Export

By clicking the **Actions** menu > **Export** or the **Export** button on the toolbar, you can export data from the **Responses** grid into different file formats. Select the export file format from the list of file types, which includes **CSV (Comma delimited)**, **TSV (Tab delimited)**, **Microsoft Excel**, and **SPSS**. During the export process, you can customize how you want your data to be exported.

Export selected responses to PDF

You can export the responses to the Adobe PDF format. You can export single record or multiple records. For more information about exporting your responses to the Adobe PDF format, see Print Respondent Record, page 989.

Date Filter

By clicking the **Date Filter** button on the toolbar, you can display response data based on the time the respondents provided their answers. For example, you can set the date filter to include responses from surveys that respondents completed today or last year. You can also clear all date filters.

Schedule Export

By clicking the **Schedule Export** button on the toolbar, you can schedule export and email delivery of the responses to the recipients to analyze answers externally. If there is an organization hierarchy defined for a workgroup, the responses export is scoped according to the task creator's organization access. The report in the selected format will be attached to the email message in a ZIP archive.

Chapter 35

Panel page

Topics

Panel tab

The **Panel** main tab enables you to add and filter panelists, create groups and profiles, access the link to your portal, and generate reports. Panelists may be a group of employees within a department or customers you want to solicit for information.

There are five more tabs under the **Panel** tab: **Panelists**, **Profiles**, and **Filters**. This topic provides a brief overview of all of them.

- **Panelists** – Use this tab to add new panelists to your panel and manage their basic information. You can add panelists manually or import a panelists list into the panel. In addition, you can export a panelists list to the .csv, .tsv, and Microsoft Excel file formats. On the **Panelists** tab, you can also view the average panel health score, which shows the panelists' activity status. A number of factors determine the health score, for example, email opening rates, survey start and completion rates, and unsubscribe rates.
- **Profiles** – Use this tab to create new profiles. A profile is a collection of related questions that are often used to track information about a panelist. For example, a **Contact Information** profile may contain questions about a panelist's home or company address, phone number, and email. Information gathered about each panelist is then used to help you determine which panelists are the best candidates to complete your surveys.
- **Filters** – Use this tab to create filters based on panelist profiles, activity status, or advanced features, such as **Original Source of Panelist** and **Portal Membership Status**. Panel filters help you compile a list of participants that closely meet the survey criteria.

> The portal functionality is only available in EFM if you purchase the EFM Online Community Builder product.

Panelists page overview

Navigation

Panel tab > **Panelists** tab.

On the **Panelists** tab, you can add new panelists to your panel and manage their basic information. You can add panelists manually or import a panelists list into the panel. In addition, you can export a panelists list to the .csv, .tsv, and Microsoft Excel file formats. The average panel health score on the **Panelists** tab shows the average activity rate of panelists.

The **Panelists** grid provides information about each panelist added to the panel. In the **Panelists** grid, the following columns are available:

- **Panelist ID** – Unique record ID of the panelist in the EFM database.
- **Email** – Email address of the panelist.
- **First Name** and **Last Name** – First and last names of the panelist.
- **Address 1** and **Address 2** – Address at which the panelist resides. You can provide more than one address.
- **City** – City in which the panelist resides.
- **State/Province** – Sate or province in which the panelist resides.
- **Country** – Country in which the panelist resides .
- **Health Score** – Average activity rate of the panelist.
- **Is Subscribed** – Status that shows whether the panelist is subscribed to your surveys.

You can sort panelists in the grid by clicking the column heading. To change the width of a column, drag its edge. At the bottom of the **Panelists** grid, you can adjust the number of panelists that are displayed on one page. The default number of panelists per page is 10; however, you can select up to 100 panelists to be displayed in the grid.

Average panel health score

The **Average Panel Health Score** link is located in the upper-right corner of the **Panelists** grid; it is based on the average health score for the entire panel, and it is updated daily. The health score shows the average activity rate of the panelist. A number of factors determine the health score, for example, email opening rates, survey start and completion rates, and unsubscribe rates.

On the **Report & Analyze** tab > **Panel Reports** tab > **Average Panel Health** page, you can generate reports on the overall growth of the panel membership and on the **Average Panel Health Score** over certain periods. For more information, see Panel Reports tab, page 1262.

> For panelists who are not invited to surveys or campaigns, the health score is N/A and is not included in the overall **Average Panel Health Score**.

The health score is a value from 0 to 100%. A health score that equals to or is less than 25% is an unhealthy rating and is highlighted in red in the **Panelists** grid. A health score that equals to or is greater than 75% is a healthy rating and is highlighted green in the **Panelists** grid. Other health score ratings are not highlighted. An administrator can change the healthy panel threshold on the **Administration** tab. See General Setup, page 1406 for details.

Actions menu options

On the **Panelists** page, on the **Actions** menu, you can select the following options:

- **Choice Labels** – Turn the response text on or off.
  - Select **On** to view the actual responses that you can see in the survey designer, for example, "Yes," "No," and "Somewhat."
  - Select **Off** to view the raw numerical values for the question responses, for example, "1," "2," and "3."
- **Health Score Highlighting (Rows)** – Turn highlighting of the **Health Score** column values on or off.
  - Select **On** to enable highlighting of panelist health scores shown in the **Health Score** column.
  - Select **Off** to remove highlighting of panelist health scores shown in the **Health Score** column.
- **Filter** – Apply a custom filter to the **Panelists** grid to view the panelists who only meet certain criteria. You can create filters based on panelist profiles, activity status, or advanced features. For example, you can filter by panelists, whose first name is Richard. For more information about managing filters, see Filters tab, page 1256.
- **Import** – Upload a file with a list of panelists to the panel. You can import .csv, .tsv, .xlsx, .txt, and .zip file formats. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats. The first line in a file must contain only identifying headers going from left to right. Each panelist entry must start from a new line in the file.

A	B	C	D	E
External ID	First Name	Last Name	Culture	Email
12345	Lisa	Mayer	en-US	lisa@hotmail.com
12346	Roger	Black	en-US	rblack@gmail.com
12347	Bill	White	en-US	Billie@yahoo.com

Import file example in Microsoft Excel

> You can save a Microsoft Excel document to the .csv or .tsv file format by using the **Save As** option.

During the import process, new panelists are added to the panel and existing panelists are updated. If a row contains an invalid email address, it is not imported. Panelists are identified by External ID. If no External ID is available during import, the system uses an email address as the External ID.

- **Export** – Export a list of panelists and their basic information into different file formats. Profile data is not exported. You can export into .csv, .tsv, or Microsoft Excel file formats.

> If you export data with the **Choice Labels** option enabled, you cannot import the data back into the panel.

- **View Panelist History** – View the surveys and campaigns history of a selected panelist. You can print panelist history details.
  - Surveys history includes survey name, last action, and date for each survey sent to the panelist.
  - Campaigns history includes survey name, invitation status, date, and campaign status for each survey to which the panelist has been invited.

> The surveys list only includes **Invite Panelists** and profile surveys, which are surveys built from the profile questions.

- **Delete Selected Panelists** – Make the selected panelists inactive. In the **Manage Participants** window, you will not be able to select a deleted panelist to take your surveys until you activate the panelist on the **Panelists** tab. For the steps on activating a deleted panelist, see Activate deleted panelists, page 1239.

Add panelists

In addition to importing a panelists list into your panel, you can add panelists manually by using the **Add Panelist** button. To add a panelist, you should provide the following information about the panelist:

- Email
- Panelist’s Display Name (optional)
- First Name (optional)
- Last Name (optional)
- Address 1 (optional)
- Address 2 (optional)
- City (optional)
- State/Province (optional)
- ZIP/Postal Code (optional)
- Country (optional)
- Phone Number (optional)
- Mobile Number (optional)
- Preferred Contact Method (set automatically)

  When a new panelist is added (or an existing panelist is updated by file import), and a **Mobile Number** exists for this panelist, **Preferred Contact Method** is automatically set to Mobile Number (if SMS feature is defined within the workgroup by System Administrator). Otherwise, it is set to Email.

  For all existing panelists, **Preferred Contact Method** is set to Email by default. You can change it to Mobile Number manually if needed.

  When sending a survey invitation to a panelist with both Email and Mobile Number specified, the **Preferred Contact Method** value is used to define whether to send invitation via email or via SMS.
- External ID (optional)

> If you do not provide any external ID, the system sets the panelist's email address as the external ID value.

- Culture (optional)

You can also add a panelist to one or more portal groups.

You can view all the panelist information on the **Manage Participants** page when adding a specific panelist to the Invite Panelists campaign.

After you added a new panelist, click **OK**. The **Add Panelist** dialog box remains open for you to continue adding more panelists. Click the **Close** button to exit the dialog box.

Edit panelists

You can change the panelist's basic information by clicking the **Panelist ID** link of a particular panelist. The **Edit Panelist** dialog box opens where you can make changes and click the **Apply** button to save your edits.

Filter menu options

On the **Filter** menu, the following options are available:

- **Customize Filter** – Create a filter and apply it to your **Panelists** grid to view only the panelists that meet your criteria. You can apply a previously created filter by selecting it on the **Apply Saved Filter** menu.

Click the **Activity** or **Advanced** section title to expand it.

- **Show All Stars** – View all panelists who have health score rating of 75% or greater.
- **Show Unhealthy Panelists** – View all panelists who have health score rating of 25% or less.
- **Show Deleted Panelists** – View all panelists who have a status of **Deleted**.

To remove the applied filter, click the **Clear** link above the **Panelists** grid.

Delete panelists

You can remove panelists from your panel by clicking the **Delete** button on the **Panelists** toolbar. A deleted panelist does not receive any invitations or reminders from your surveys. Additionally, in the **Manage Participants** window, you will not be able to select a deleted panelist to take your surveys until you activate the panelist on the **Panelists** tab.

Search

Using the **Search** option, you can quickly find a panelist in the **Panelists** grid. Type a partial or whole panelist's first name, last name, or email address in the search field and click the **Search** button. The list of panelists that matches your input is displayed.

Import panelists list

Procedure

1 On the **Panelists** page, on the **Actions** menu, click **Import**.

2 In ther **Import Panelists into the Panel** dialog box:

a. Click **Browse** to navigate to the file that you want to upload. You can import .csv, .tsv, .xlsx, .txt, and .zip file formats. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats. For faster uploading, compress your files.

> All date and time values must be imported in **Coordinated Universal Time** (**UTC**) format.

b. Select the file, and then click **Open**.

c. Click **Next**.

3 In the **Map Fields** dialog box, match the imported file columns to the corresponding panelist field names, and then click **Next**.

4 Click **Import**.

The imported panelists list is displayed in your **Panelists** grid.

Activate deleted panelists

Procedure

1 On the **Panelists** page, on the **Filter** menu, click **Show Deleted Panelists**.

The filter is applied, and all deleted panelists appear in your **Panelists** grid.

2 Click the **Panelist ID** link of a deleted panelist.

3 In the **Edit Panelist** dialog box, on the **Status** menu, click **Active**.

4 Click **Apply**.

The panelist is activated and appears in your **Panelists** grid again.

> To browse through the list of panelists, click the previous or next link in the **Edit Panelist** dialog box.

5 Click the **Clear** link above the **Panelists** grid to remove the applied filter and view the active panelists on your panel.

Manage columns

You can add more columns to the **Panelists** grid, including the columns from other surveys.

> **Generate Link** surveys do not have this option.

You can only add columns from other surveys if they are the same survey type.

1 On the **Panelists** toolbar, click **Columns**.

2 In the **Columns** dialog box, click the red arrow next to the folder that you want to add columns from (**Panelists**, **Campaign History**, **Profiles**, or **Surveys**).

3 Select the check box next to the column that you want to add to your **Panelists** grid or clear the check box next to the column that you want to remove from the **Panelists** grid.

4 To save your changes, click **Apply**.

Excel export restrictions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one > **Analyze** tab > **Responses** tab > **Export** menu > **Microsoft Excel** option.

If you export a large amount of responses to Microsoft Excel, which may consume a lot of memory, the export is restricted. In such case, you are offered to export responses to the .csv file format. If you agree, the system automatically exports all data to the .csv file, which you try to export to Microsoft Excel. You can open the .csv file with Microsoft Excel.

Export large data sets to Microsoft Excel

Procedure

1. On the **Export** menu, select **Microsoft Excel**.
2. In the export restriction dialog box, click the **Export to CSV** button.
3. In the **Export Responses** dialog box, select the appropriate options, and then click **Next**.
4. Click the download link.
5. In the **File Download** dialog box, click **Save**.

Export large panelist data to Microsoft Excel

Procedure

1. Go to the **Panel** tab > **Panelists** tab.
2. On the **Actions** menu, point to **Export**, and then click **Microsoft Excel**.
   For the large datasets, the export is restricted.
3. Click the **Export to CSV** button.
4. In the **Export Panelists** dialog box, click the download link, and then save the file.
5. Import the saved .csv file into Microsoft Excel.

Panel Health Score

Navigation

Panel tab > **Panelists** tab > **Panelists** grid > **Health Score** column.

EFM's proprietary health scores provide administrators with an immediate overview of respondent history, both at the individual panelist and aggregate panel levels. Numerous factors go into determining the health score including email open rates, survey start and completion rates, and unsubscribe rates.

With the Health Score functionality, you have great flexibility in viewing "star panelists" with one click on the panelists **Filter** menu (**Show All-Stars**). This is a great shortcut for quickly identifying panel stars for a focus group follow up, for example. Similarly, you can select the **Show Unhealthy Panelists** option for consideration of deletion or other actions with a single click.

Panelist Activity and the Panelist's Health Score

If the Panelist has not been invited to any surveys or campaigns, their health score will appear as "N/A" and will not be factored into the panel overall **Average Health Score**.

View Panelist History

To view a particular Panelist's history, use the View Panelist History functionality.

Procedure

1. On the **Panelist** grid, select a check box next to the desired panelist.
2. On the **Action** menu, select **View Panelist History**. The **Panelist History** dialog box displays. The dialog box defaults to the **Surveys** tab and displays the **Survey Name**, **Last Action**, and **Date** for each survey the Panelist has been sent.
3. In the **Panelist History** dialog box, select **Send to Printer** to print the current page.

> Also available from this **Surveys** dialog box tab is the Panelist's name and current health score. Only **Workgroup** and **Profile Surveys** are included in the list.

Campaigns tab

The **Campaigns** tab is also available in the **Panel History** dialog box and provides the campaign history of each panelist.

To view a particular Panelist's campaign history, use the **View Panelist History** functionality, but select the **Campaigns** tab when the **Panel History** dialog box displays.

Procedure

1. On the **Panelist** grid, select a check box next to the desired panelist.
2. On the **Action** menu, select **View Panelist History**. The **Panelist History** dialog box displays. The dialog box defaults to the **Surveys** tab.

3 In the **Panelist History** dialog box, select the **Campaigns** tab. This tab displays the **Survey Name**, **Invitation Status**, **Date**, and **Campaign Status** for each survey the Panelist has been sent.

4 Select **Send to Printer** to print the current page.

Campaign action status definition

- **Undeliverable** – An immediate notification from the server that can be caused by numerous reasons.
- **Bounced Back** – Email did not make it to the participant and bounced back from server or email address.
- **Unsubscribe** – Opened the email, but clicked the **unsubscribe** link. Will remove user from all future mailings.
- **Opened Email** – Opened the email but did not click the survey link.
- **Survey Started** – Opened the email and clicked the survey link.
- **Completed Survey** – Completed and submitted your survey.

Show All Stars and Show Unhealthy Panelists

Show All Stars and **Show Unhealthy Panelists** are available on the **Filter** menu.

Show All-Stars

To show Panelists that have a high rating, use the **Show All-Stars** functionality.

Procedure

1 On the **Filter** menu, select **Show All-Stars**.

2 A list is generated based on your Administrator's designated threshold for this status. Thresholds are set on the **Administration** main page.

> Panelists above or at this percentage will have scores highlighted in green in the Panelists list. The threshold is based on a 1%-100% score scale, where 1 is very bad and 100 is excellent.

Show Unhealthy Panelists

To show Panelists that have a low rating, use the **Show Unhealthy Panelists** functionality.

Procedure

1 On the **Filter** menu, select **Show Unhealthy Panelists**.

2 A list is generated based on your Administrator's designated threshold for this status. Thresholds are set on the **Administration** main page.

> Panelists below or at this percentage will have scores highlighted in red in the Panelist grid. The threshold is based on a 1%-100% score scale, where 1 is very bad and 100 is excellent.

Health Score Highlighting

Health Score Highlighting – A health score for each panelist is available. The health score is a weighted value on a 0% to 100% scale, where anything 25% and under is unhealthy and 75% and above is healthy. This is the default setting.

Health Scores are presented with color-keying to quickly identify good/bad thresholds. By default, the healthy score for each panelist will present as:

- Green, bold if above 75% – healthy
- Red, bold if below 25% – unhealthy
- All other percentages display in black

Administrators have the ability to change the preset thresholds. This option is located on the **Administration** tab.

Procedure

1. Click the **Configuration** tab > **General Setup** tab.
2. Click inside the **Healthy Panel Threshold** text box and enter a number for the Healthy Threshold (1-100).
3. Click inside the **Unhealthy Panel Threshold** text box and enter a number for the Unhealthy Threshold (1-100).
4. Click **Save Setup**.

Selecting Columns to Display

Administrators can select what data columns are visible on the **Panelists** tab. Create the report that you want by selecting the columns you want to display.

Procedure

1. On the **Panelists** page, click the **Columns** button.
2. In the **Column** dialog box, select the check box next to the column names that you want to display.
3. Click **Apply**.

> You can filter data based on selected columns, based on basic profiles, or custom profile data by using the **Filter** button. In addition, you can also sort by columns in the grid to get the most relevant Panelists' view. Once you acquire your desirable information in the grid, simply export to .csv (column delimited), .tsv (tab delimited) or Microsoft Excel format. Export is available on the **Actions** menu.

Average Panel Health Report

Available from the **Report & Analyze** tab > **Panel Reports** tab > **Average Panel Health** option. This report provides the health of your Panel over time.

Procedure

1. Go to the **Report & Analyze** tab > **Panel Reports** tab > **Average Panel Health** option.

2 The **Average Panel Health** page displays.

You have the ability to filter the report by date, email the report, or display for printing.

Deactivating the Health Score Updates

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Collect** tab > **Overview** dashboard.

For the **Invite Panelists** surveys, you can send emails that are not counted towards the panelist health score so that you can send emails without surveys. If panelist takes the survey with the **Disable panelists health score updates for the survey** check box selected, the panelist health score and average panel health score are not affected. By default, this check box is clear.

You can deactivate the panelist health score updates on the **Overview** dashboard.

If the unsubscribe link is included in the email and the user clicks the link, the user's health score becomes zero.

Procedure

1 On the **Overview** dashboard, click the icon, and then click the **Advanced Properties** option.

> The **Advanced Properties** option is available for the **Invite Panelists** surveys only.

2 To deactivate the health score updates, select the **Disable panelists health score updates for the survey** check box.

3 Click **Save**.

Profiles tab

Navigation

Panel tab > **Profiles** tab > **Profiles** page.

A profile is a collection of related questions that are often used to track information about a panelist. For example, a profile labeled **Contact Information** might contain questions about a panelist's home address, work address, and phone number. A panelist might be included in one or more profiles. It is recommended, but not required that each profile contain related questions about the panelists. The **Basic Information** profile is the default profile that is included in all Workgroups. It contains exactly what the name infers basic information to include **Email**, **First Name**, **Last Name**, **External ID**, and **Culture**.

> The **Basic Information** profile cannot be edited or deleted from the **Profiles** tab. Basic Information for each panelist is created when you select **Add Panelist** on the **Panelist** page. The **Add Panelist** dialog box displays.

Design Profile

Design your profiles similar to how you would design your survey. Notice how the User Interface is similar to the **Survey Designer** page. Create your profile questions as you would in the **Survey Designer**. See Choose One questions, page 247 and Choose Many questions, page 249.

> Profiles are always rendered in **Classic** survey rendering mode with no option to change it. For more information about survey rendering modes, see Survey rendering overview, page 414.

You can navigate to the **Design Profile** page by clicking the **New** button on the **Profiles** toolbar or if you have an existing profile you want to edit, click the  icon next to the profile you want to edit.

Create a profile

Procedure

1. On the **Profiles** toolbar, click the **New** button.
2. In the **Name Your Profile** dialog box, in the **Profile Name** text box, enter a name for your profile.
3. Click **OK**.

Duplicate a profile

Procedure

1. On the **Profiles** page, select a check box next to the profile that you want to duplicate.
2. On the toolbar, click the **Duplicate** button.
3. In the **Duplicate a Profile** dialog box, in the **Profile Name** text box, enter a name for your profile.
4. Click **OK**.

Select **Include all reports associated with this survey** check box if you want to include the reports that were associated with the original profile. In addition, note that this copy process will create a new, unpublished profile without any of the responses that were received in the original profile.

Insert profile questions or data

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Analyze** tab > **Design** tab > **Add a Question** panel > **Add from Library** option > **Insert Item** dialog box > **Profile Questions** tab.

You can insert profile questions and data into your survey to pipe information from the **Panel** and **Profiles** into your survey. This functionality is available for the **Invite Panelists** surveys only.

Adding profile questions to the survey offers three key benefits:

- Profile questions function as library questions in that the design can be applied to multiple surveys.
- Profile question data is automatically preselected for each panel member added to the survey participant list. This means that pre-existing demographics for survey respondents is available for use in survey response analysis without having to ask repeatedly. Once inserted into the questionnaire, profile questions can be hidden from participant view.
- If profile questions remain visible to allow respondents to update existing demographics, the updates can be transferred to the participant panel data directly from the survey.

> You can use **Step-by-step** mode only to add, remove, and apply properties to your profile questions.

Profile questions added to the survey are locked from any updates but you can access the following properties for this question:

- **Appearance** (read and write access)
  - Show Question Heading
  - Show Question
- **Validation & Logic** (read access)
  - Custom Properties

To edit the profile question, go to the profile designer.

> When you export a survey containing profile questions to another Workgroup, the profile questions are lost and need to be added to the survey again.

When you add multiple campaigns to your survey, profile questions for the **Invite Panelists** campaign are hidden from the respondents that belong to other campaign types, and the icon appears next to the question heading in the survey designer.

Insert profile question into your survey

Procedure

1. In the **Add a Question** panel, click the **Add from Library** option.
2. In the **Insert Item** dialog box, click the **Profile Questions** tab.
3. In the **Profiles** menu, select the profile with the question that you want to insert.

4 In the **Questions** menu, select the check box next to the question that you want to add to your survey. You can select multiple questions to be added to your survey at a time in the order they appear in the **Questions** menu.

> You can preview the selected question in the right pane.

5 Click **OK**.

Insert profile data into your survey

Procedure

1 Click any question, and then click in the question text field. The editing toolbar for this question appears.

2 Click the icon in the question edit box.

3 In the **Insert Piped Value** dialog box, click the **Profiles** tab.

4 In the **Panel Profile** menu, select the profile with the question that you want to insert.

5 In the **Field** menu, select profile data that you want to pipe into your survey.

6 Click **OK**.

> You can update the profile information provided by panelists when responding the survey by using the **Update Profiles** option in the **Actions** menu on the **Response Manager** page. For more information, see Update profiles, page 1255.

Create and edit profiles

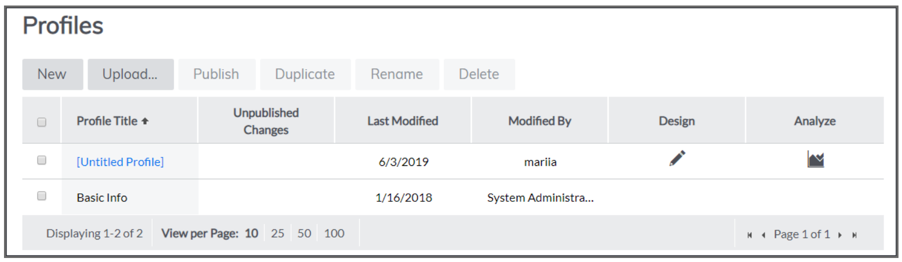
Navigation

Panel tab > **Profiles** tab.

On the **Profiles** page, you can create and manage your profiles to gather information about each panelist and determine the best candidates to complete your surveys. You can create profiles manually in a profile designer or import an EFM profile file.

The **Profiles** grid provides you information on each profile you created. You can sort profiles by clicking the column heading. To change the width of a column, drag its edge.

In addition, you can display more or fewer profiles in the **Profiles** grid. At the bottom of the page, a toolbar enables you to adjust the number of profiles that appears on one page. The default number of profiles per page is 10, but you can select up to 100 profiles to appear on the **Profiles** page.



The Profile page

To manage all profiles, select the check box in the upper-left corner of the **Profiles** grid.

In the **Profiles** grid, the following columns are available:

- **Posted to Portal** – Shows whether the profile is active and posted to the portal. This column appears only if the Online Community Builder add-on product is installed.
- **Profile Title** – Shows the name of the profile.
- **Unpublished Changes** – Shows whether all changes are published and present in the live profile.
- **Last Modified** – Shows the last time when a user made changes to the profile.
- **Modified By** – Shows the name of a user who made changes to the profile.
- **Design** – Opens a profile designer where you can edit your profile.
- **Analyze** – Opens a report designer where you can create and edit reports on your profile.

For information on creating a profile in a profile designer and duplicating a profile, see Create a profile, page 1246 and Duplicate a profile, page 1246.

Publish or apply changes to a profile

After editing a profile, you need to publish it to update your live profile.

- For an unpublished profile, select the profile in the list, and then, on the toolbar, click **Publish**.

- For a published profile that has changes, select the profile in the list, and then, on the toolbar, click **Apply Changes**.

> You can view the publishing status of a profile in the **Profiles** grid, in the **Unpublished Changes** column.

Activate or deactivate a profile

After designing a profile, you can activate it to make this profile visible in your portal. Note that the **Activate** button is available only if the Online Community Builder add-on product is installed.

- To activate a profile, select the inactive profile in the list, and then, on the toolbar, click **Activate**.
- To deactivate a profile, select the active profile in the list, and then, on the toolbar, click **Deactivate**.

> You can view the status of a profile in your portal in the **Profiles** grid, in the **Posted to Portal** column.

Rename and delete a profile

- To rename a profile, select a check box next to the needed profile, and then, on the toolbar, click **Rename**.
- To delete a profile, select a check box next to the needed profile, and then, on the toolbar, click **Delete**.

Add profile

Navigation

Panel tab > **Profiles** tab.

You can create a profile by importing it from a Microsoft Word (.doc and .docx) or EFM profile file (.que). It is possible to use the profile designer to create a prototype for the profile, and then download the profile to create the .que file. In addition, you can select a Microsoft Word document as the profile source. Be sure to include formatting for questions, text, and comments. You may use the Microsoft Word document example link in the **Upload Profile** dialog box as a reference for your profiles as well.

Before you begin

- Verify that the file to be uploaded does not contain **Modern** survey rendering features. Otherwise it will not be uploaded.

Procedure

1. On the **Profiles** page, click **Upload**.
2. To navigate to the file you want to upload, in the **Upload Profile** dialog box, click **Select**.

   The available file formats are Microsoft Word (.doc and .docx) and EFM survey file (.que).
3. Select the file, and then click **Open**.

> The **OK** button becomes available after you upload a file.

4. Click **OK**. The profile is created from the selected file.

> You can download a Microsoft Word example by clicking the **Microsoft Word Survey** link in the **Upload Profile** dialog box.

Upload a profile

Navigation

Panel tab > **Profiles** tab.

You can create a profile by importing it from a Microsoft Word (.doc and .docx) or EFM profile file (.que). It is possible to use the profile designer to create a prototype for the profile, and then download the profile to create the .que file. In addition, you can select a Microsoft Word document as the profile source. Be sure to include formatting for questions, text, and comments. You may use the Microsoft Word document example link in the **Upload Profile** dialog box as a reference for your profiles as well.

Before you begin

- Verify that the file to be uploaded does not contain Modern survey rendering features. Otherwise it will not be uploaded.

Procedure

1. On the **Profiles** page, click **Upload**.
2. To navigate to the file that you want to upload, in the **Upload Profile** dialog box, click **Select**. The available file formats are Microsoft Word (.doc and .docx) and EFM survey file (.que).
3. Select the file, and then click **Open**.
4. Click **OK**.

> The OK button becomes available after you upload a file.

The profile is created from the selected file.

> You can download a Microsoft Word example by clicking the **Microsoft Word Survey** link in the **Upload Profile** dialog box.

Edit a profile

Navigation

Panel tab > **Profiles** tab.

You can edit your profile by adding, deleting, or changing the questions as needed.

Procedure

1. In the **Profiles** grid, click the name of the profile that you want to edit.
2. In the profile designer, change your profile questions.

   The changes are saved automatically in the profile designer.

To publish your profile, that is to apply changes to your live profile, in the profile designer, click the **Apply** link.

Update profiles

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > open an existing survey or create a new one > **Analyze** tab > **Design** tab > **Add a Question** panel > **Add from Library** option > **Insert Item** dialog box > **Profile Questions** tab > **Profiles** menu > select the profile with a question you want to insert in your survey.

You can update the profile information provided by panelists when responding to the survey by clicking the **Update Profiles** option in the **Actions** menu, on the **Response Manager** page.

Before you begin

- Verify that panelists answered the survey that was previously sent to them.

Procedure

1. To access the **Response Manager** page, select the **Analyze** tab, and then click the **Responses** tab.
2. In the **Actions** menu, click **Update Profiles**.
3. To copy all of the answers to any borrowed questions back to the panelist's profile, in the **Update Profiles** dialog box, click **OK**, and then click **Close**.

   The panelist's profile is updated.

> Updating profiles will overwrite the already-existing profile information.

Filters tab

Navigation

Panel tab > **Filters** tab > **Filters** page.

Panel filters help you compile a list of participants who meet the survey criteria. On the **Filters** page, you can create filters based on panelist profiles, activity status, or advanced features. All your filters are saved in the **Filters** grid, so you can use previously created filters to quickly build a list of survey participants.

On the **Filters** toolbar, you can use the following options to manage panel filters:

- **New** – Open the **Filter** dialog box where you can create a new filter and use it to compile a list of participants that meet your survey criteria.
- **Delete** – Remove the selected filter from the **Filters** grid.
- **Share** – Allow other users to access your filter.

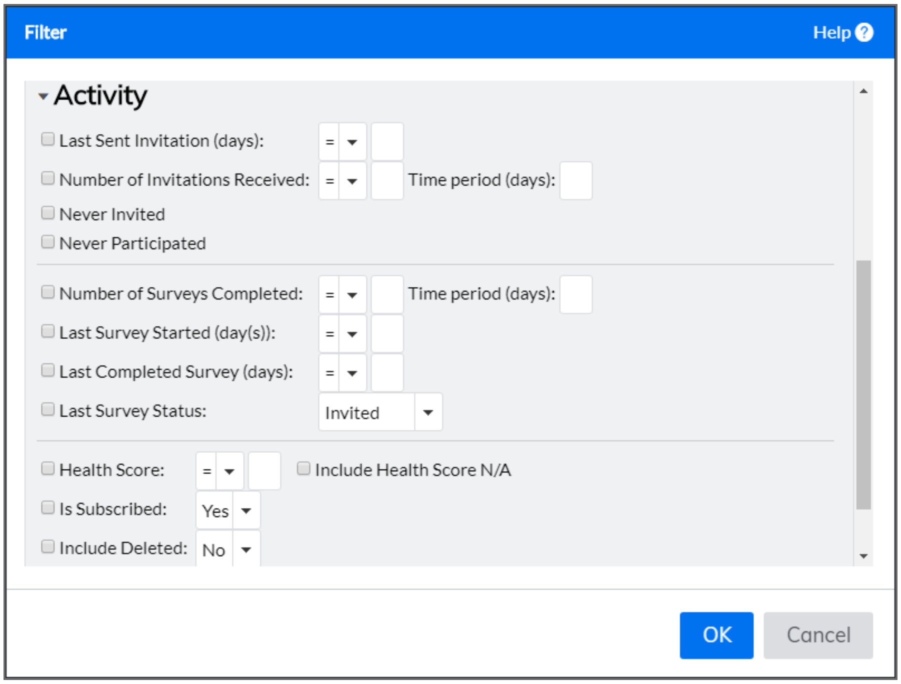
You can also apply a previously created filter by selecting it from the **Apply Saved Filter** menu in the **Filter** dialog box.

To view the filter options under the **Activity** or **Advanced** section, click its title.

Activity section

You can filter panelists based on their activity status in your survey. The following options are available under the **Activity** section:

- **Last Sent Invitation (days)** – Filter panelists who have been sent the invitation to a survey during a specified date range.
- **Number of Invitations Received** – Filter panelists who received a certain number of invitations in the last N days.
- **Never Invited** – Filter panelists who have never been invited to take your surveys.
- **Never Participated** – Filter panelists who have been invited to take your surveys, but have never started a survey.
- **Number of Surveys Completed** – Filter panelists who completed a certain number of surveys in the last N days.
- **Last Survey Started (days)** – Filter panelists who started the survey during a specified date range.
- **Last Completed Survey (days)** – Filter panelists who completed the survey during a specified date range.
- **Last Survey Status** – Filter panelists who have the **Invited**, **Started**, or **Completed** last survey status.
- **Health Score** – Filter panelists who have a specified health score. You can also filter the panelists who have the N/A heath score.
- **Is Subscribed** – Filter panelists who are subscribed to or unsubscribed from your surveys.
- **Include deleted** – Filter panelists who have the **Deleted** status on the **Panelists** tab.



Activity section

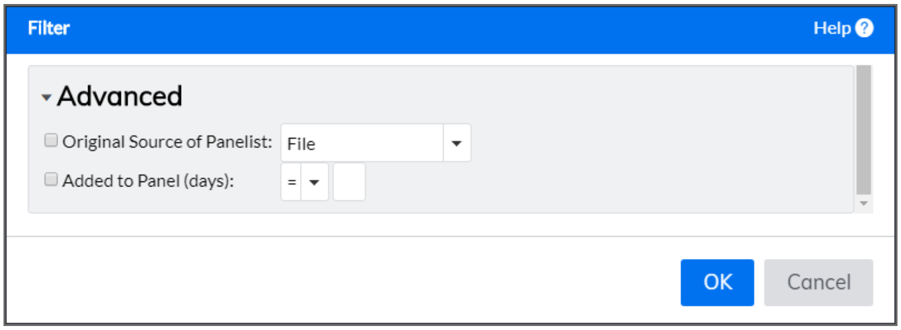
Advanced section

You can filter panelists based on advanced features. The following options are available under the **Advanced** section:

- **Original Source of Panelist** – Filter panelists based on how they are added to the panel.
- **Added to Panel (days)** – Filter panelists based on when they are added to the panel.

The **Portal Membership Status** and **Portal Group Assignment** options are available if you have the EFM Online Community Builder product.

- **Portal Membership Status** – Filter panelists based on their status in your portal. The available options are **Not Yet Invited**, **Invited, But Not Registered**, **Registered, but Unconfirmed**, and **Registered Panelist**.
- **Portal Group Assignment** – Filter panelists based on the portal group to which they belong.

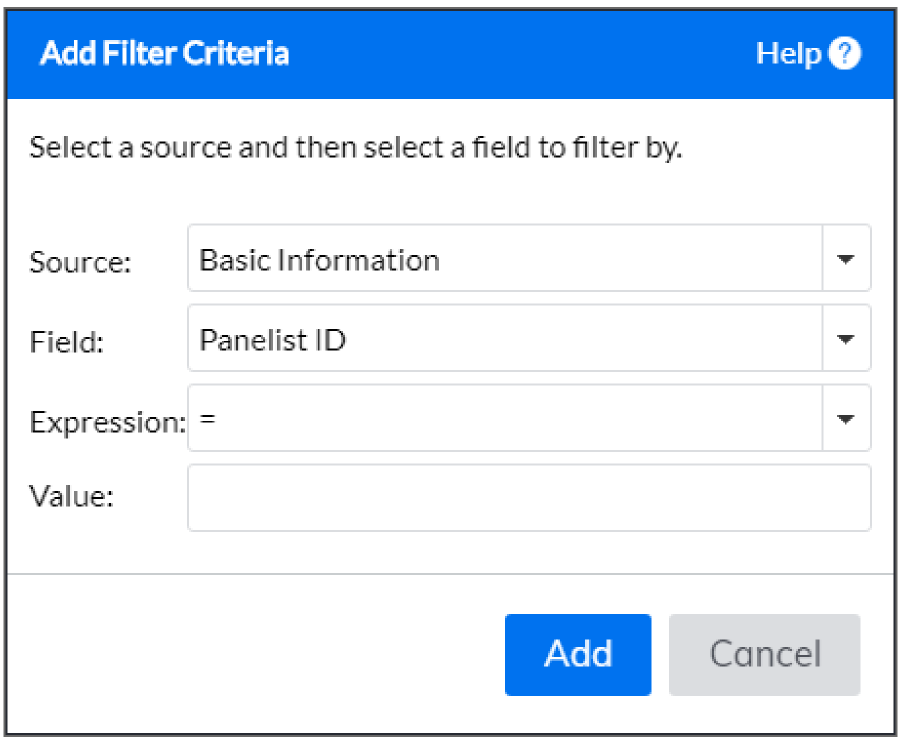


Advanced section

Create a new filter based on panelist profile

Procedure

1. On the **Filters** page, click the **New** button.
2. In the **Filter** dialog box, in the **Filter Name** text box, enter the title of your filter.
3. Click the **Add** button or **Add Filter Criteria** link.
4. In the **Add Filter Criteria** dialog box, in the **Source** list, select the source data for your filter.



Add Filter Criteria dialog box

5 Select the field, expression, and value by which you want to filter panelists. For example, to filter panelists whose first name is Richard, select **First Name = Richard**.

6 Click the **Add** button.

The new filter appears in the **Filter** dialog box.

> You can use a toolbar to add, duplicate, move up, move down, or delete your filter criteria.

7 Click **OK**.

The filter appears in the **Filters** grid.

Edit Your Filter

Procedure

1 On the **Filters** page, click the name of the filter that you want to edit.

2 In the **Filter** dialog box, edit the filter criteria.

3 Click **OK**.

Share Your Filter

Procedure

1 On the **Filters** page, select the check box next to the filter taht you want to share with other users.

2 On the **Filters** toolbar, click the **Share** button.

The appropriate icon appears next to the shared filter.

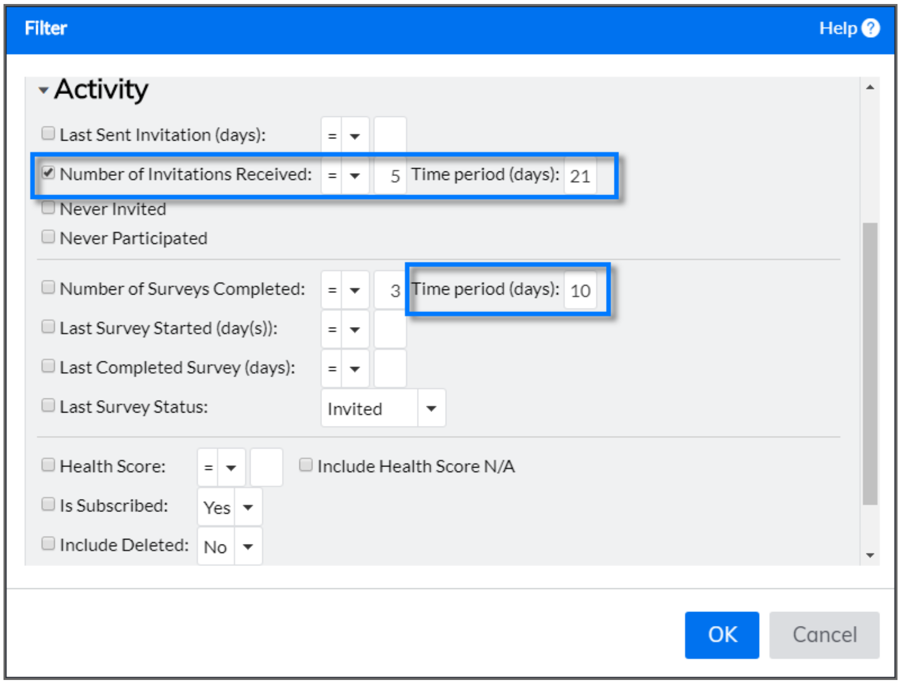
> If you no longer want to share your filter, select the check box next to the filter, and then click the **Share** button. The icon next to that filter disappears.

Panel filtering – additional options

Navigation

Panel tab > **Filters** tab > **Filters** page > **New** button > **Filter** dialog box > **Activity** section.

You can use additional filtering options based on the panelists activity.



The additional filtering options in the Filter dialog box

You can filter the panelists by number of completed surveys and received invitations to compile a list of participants who meet the survey criteria. You can also access the filtering while adding the panelists on the **Manage Participants** page.

Number of Invitations Received

You can filter panelists who received the invitation to take a survey in the last N days. Filtering is based on the number of surveys they have been invited to, not the number of emails they have received to take a survey. For example, if a participant received one initial invitation and three reminders for the same survey, they are counted as one "invite" for this filter, not four. For the transactional surveys scenario or the scenario where the same panelist can be asked to take the same survey more than once, invitations are counted as one. If you manually change the invitation status to **Invitation Sent**, it counts towards this filter.

Number of Surveys Completed

You can define the date range for the survey completion by entering the number of days in the **Time period (days)** text box. If the time period is not defined, the filter includes no time limit.

> For more information about the panel filtering, see Filters tab, page 1256.

Filter panelists by the number of invitations received

Procedure

1. On the **Filters** page, click the **New** button.
2. In the **Filter** dialog box, click the **Activity** section to expand it.
3. Select the **Number of Invitations Received** check box.
4. Select the expression from the adjacent drop-down list. The following expressions are available:
   - Equal To
   - Not Equal To
   - Less Than
   - Greater Than
   - Less Than Or Equal
   - Greater Than Or Equal
5. Enter the number of invitations received during the specific date range in the text box to the right of the **Expression** list.
6. Define the date range of the invitations received by entering the number of days in the **Time period (days)** text box. If the time period is not defined, the filter includes no time limit.
7. To save the filter, click **Apply Filter**.

Panel Reports tab

Navigation

Report & Analyze tab > **Panel Reports** tab > **Panel Size Report** or **Average Panel Health** option.

The **Report & Analyze** tab > **Panel Reports** tab provides access to two **Panel** reports:

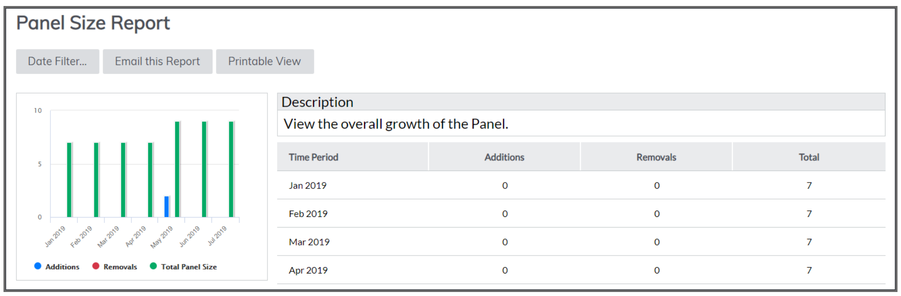
- **Panel Size Report** – Provides information on the growth of your **Panel**. This report provides you how many panelists were added or deleted, by month, as well as a chart view of the information.
- **Average Panel Health** – Provides information on your Panel's health over time. This report provides you the Average Panel Health, by month, as well as a chart view of the information.

You have options from the reporting pages to filter the data by date, email the report, or print the report.

Create a Panel Size Report

Procedure

1 Go to the **Report & Analyze** tab > **Panel Reports** tab > **Panel Size Report** option.



The Panel Size Report

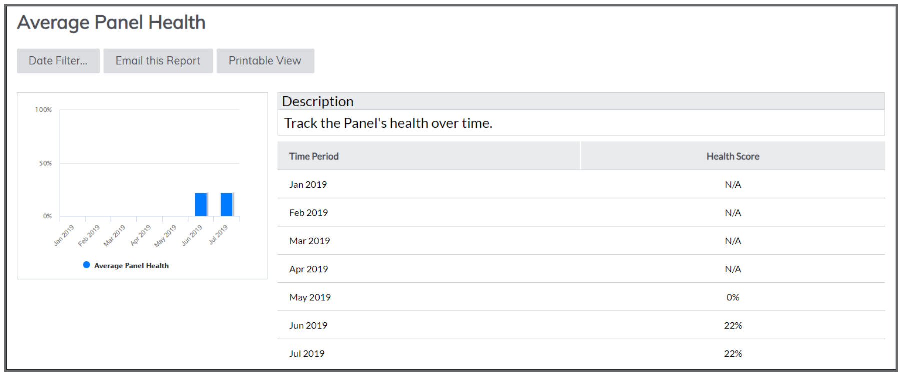
From this page, you have the option to filter the data by selecting the **Date Filter** button. Restrict the results to a specific time period or choose to include all data. See the **Date Filter** dialog box below.

In addition, you have the option to print the report or send a copy via email. Click the appropriate button to perform these functions.

Create an Average Panel Health Report

Procedure

1 Go to the **Report & Analyze** tab > **Panel Reports** tab > **Panel Size Report** option.



Time Period	Health Score
Jan 2019	N/A
Feb 2019	N/A
Mar 2019	N/A
Apr 2019	N/A
May 2019	0%
Jun 2019	22%
Jul 2019	22%

The Average Panel Health Report

From this page, you have the option to filter the data by selecting the **Date Filter** button. Restrict the results to a specific time period or choose to include all data.

In addition, you have the option to print the report or send a copy via email. Click the appropriate button to perform these functions.

Library page

Topics

Library tab

Navigation

Library tab > **Questions** tab.

You can access a variety of information that can be created and stored for the later use.

> The **Library** tab is available if you have the **Library Items** permission. To assign permission to the needed user role, contact your Group Administrator.

On the **Library** page, the following tabs are available:

- **Questions** – Questions that are stored at this location can be used in multiple surveys without recreating the question each time. On this side tab, you can add new questions, and then add them to your **Question Library**.
- **Hierarchical Questions** – Hierarchical questions can be used in your survey when your participants are presented with several choices. The choices with which participants are presented are based on their answers to previous steps in the question hierarchy.
- **Choice Lists** – Different lists of choices/responses that can be inserted as answer options for a question within your survey.
- **AutoDropdowns** – AutoDropdown list of choices from which you can choose, and then insert them into your surveys.
- **Page Blocks** - Page blocks allow you to add groups of questions from the library rather than individual questions, to build surveys.
- **Code Blocks** – Code blocks that you can add to your own JavaScript code in the survey. You can add code blocks to the library to reuse them in your surveys later.
- **Text Blocks** – Text blocks that you can create to add descriptive text about a section or instructions for your questions. You can add text blocks to the library to reuse them in your surveys later.
- **Survey Templates** – Survey that you (as well as other users) can use as a template by adding it to your Survey Template list at this location. This can make the process of creating surveys quicker and more efficient. In addition, users have access to several templates that come with the product.
- **Survey Themes** – Survey themes are used to quickly control the look and feel of questionnaires. Survey consists of the questionnaire itself and all steps needed to create, publish, receive, and analyze the results. The application uses standard CSS and HTML header files to create themes. These files can be created and/or modified by users with the appropriate permissions or role.
- **Report Themes** – Similar to **Survey Themes**, a default theme can be assigned to your report or you can create a customized report theme that you can apply to your reports.
- **Language Packs** – Language pack contains the default validation messages, labels, and end pages of the survey in a certain language. You can store, export, import, and delete the language packs at this location. When you create a new survey or change the language of your survey, the language pack is applied to your survey in the closest matching language automatically.
- **Image Manager** – Your images can be uploaded, placed in different folders, and you can edit them. Then you can insert the images into your survey questions, reports, themes, etc. You can also remove the images you do not need anymore.

- **Media Manager** – Your media can be uploaded and placed in different folders. Then you can insert the media into your survey questions, reports, themes, etc. You can also remove the media you do not need anymore.

Add a question to the question library

Procedure

1. On the **Library** tab > **Questions** tab, click **New**.
2. In the **Add Library Question** dialog box, enter a name for your question.
3. In the **Questionnaire** list, all of your available surveys are displayed. Select your survey from the list.
4. In the **Questionnaire** list, questions for the selected survey are displayed. When you select a survey question, it is previewed in the right display pane.

> There is the **Add All** link in the question drop-down, which enables you to add all questions from the selected survey into the library as a group or individually.

5. Specify a category for your library question.
   You can select a category from the list or create a new category list name by entering a new name in the text box.
6. To add the question to the library, click **OK**.

> Select the **Allow editing of this question** check box if you want to grant other users the ability to modify this question once they add it to their survey.

Delete a question

Procedure

1. To delete a question from the library, select the question, and then click **Delete**.
2. To confirm, in the confirmation dialog box, click **OK**.
   To terminate the action, click **Cancel**.

Edit a question

You can only edit a question from the library if it is defined as **Editable**. The **Allow editing of this question** check box that is available when you create a new library question, determines whether the question is editable.

If there is a **Yes** status in the **Editable** column, the question will be editable once you insert it into your survey. If this column has a **No** status, then you must use the question in its current state. When you change the text in the editable question, it will be updated only in the survey where you make the changes.

> In this grid, all columns (**Name**, **Question**, **Category**, and **Editable**) can be sorted. Click the heading name once for ascending order or twice for a descending order sort.

Adding library questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** menu or **Add a Question** section > click **Library Question**.

When you create a survey, you can use questions from the library to design your survey quickly and efficiently. Library questions are managed by the Library Manager for the later use by any survey designer in your environment. Questions in the library can be open or locked. The design of a locked library question cannot be modified and serves as a standard for your organization surveys.

If the library question is locked, you cannot edit the question but you can edit the following question properties:

- Show Question Heading
- Visibility

The locked library question is marked with the lock sign.

Procedure

1. On the **Design** tab > **Content** tab > **Add a Question** section, click the **Library Question** button.
2. In the **Insert Item** dialog box > **Library Questions** tab, questions are sorted by categories.

> If your survey contains at least one question or other content, you can add a library question by clicking the **Add** button or the **Add** menu.

3. In the **Categories** list, select the category with the library question that you want to insert.
4. In the **Questions** list, select the check box next to the question that you want to add to your survey. You can select multiple questions to be added at a time in the order they appear in the **Questions** list.
   Question preview is available in the right pane.

> You can add only one **External ID** question to your survey.

5. Click **OK**.
   The selected library question is added to your survey.

Adding other content from library

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing survey > **Design** tab > **Content** tab > **Add** menu or **Add a Question** section > click **Add from Library**.

When you create a survey, you can add text blocks and code blocks from the library to design your survey quickly. You can create code blocks and text blocks for the later use, and then add them to your survey.

Procedure

1 On the **Design** tab > **Content** tab > **Add a Question** section, click the **Add from Library** button.

> If your survey contains at least one question or other content, you can add code blocks and text blocks by clicking the **Add** button or the **Add** menu.

2 In the **Insert Item** dialog box, click the **Other Content** tab.

3 In the **Categories** list, select the **Code Blocks** or **Text Blocks** option. The **Text Blocks** is a default option.

4 In the **Elements** box, the list of available code blocks appears. Select the check box next to the item that you want to add to the survey. You can select multiple items to be added to your survey in the order they appear in the **Elements** list.

> You can preview the selected element in the right pane.

5 Click **OK**.
The selected element is added to your survey.

Library Hierarchical Questions tab

Navigation

Library tab > **Hierarchical Questions** tab.

With hierarchical questions, you can create multiple-choice questions in your survey. The presented choices are based on the participant's answer to a previous step in the question hierarchy.

For example, in a survey that relates to car or truck manufacturers and models, you want to provide your participants with choice selections. Let us say that your question is "What type of automobile do you drive?" You create a hierarchical question that includes a "Manufacturer" list and add Honda, Ford, Chevy, etc. to the list. As a second step to this question, you also specify the model of the vehicle. So, you add "Model" as a sublist, and in that list you add all models for each manufacturer, such as Honda where you enter models like Accord, Civic, Pilot, etc.

With the help of hierarchical questions, participants can answer your survey quickly and easily. As they click manufacturer, for example, they are presented with choices of Honda, Ford, Chevy, and any other type of manufacturer you want to add as a choice. Based on their choice of manufacturer, they are presented with a group of model choices from which to choose. For instance, if the user selected Chevy, then they could be presented with Malibu, Corvette, Impala, etc.

Tips for hierarchical questions

- Your list in each step appears in alphabetical order.
- You can select the **Preview** tab at any time to see how your hierarchical question looks before inserting it into your survey.
- Question heading and question text are required when creating your hierarchical question.
- You can use the **Delete** button to remove the choices associated with a particular list item. This does not remove the whole step.
- Use the **Remove Previous Step** and **Add Step** options to delete or add steps within your hierarchical process, respectively.

Hierarchical Questions are only available with the EFM Enterprise Edition.

Feedback Intelligence Users, hierarchical questions are not available for export to Feedback Intelligence and should not be used if you require your data to be exported to the Feedback Intelligence product.

On the **Library** page, with Hierarchical Questions you can do the following:

- **New** – To create a new hierarchical question, select **New**.
- **Duplicate** – To duplicate a question, select the check box next to the question that you want to duplicate, and then click **Duplicate**.
- **Delete** – To delete a question, select the check box next to the question that you want to delete, and then click **Delete**.

Create a new hierarchical question

Procedure

1. Go to the **Library** page > **Library** tab > **Hierarchical Question** tab > click **New**.
2. On the **Questions** tab of the hierarchical question editing page, enter a name for your question, your **Question Heading** text, and add your question to the **Question Text** area. You can also provide additional instructions to the question in the **Instructions** text box.

   > In the **Classic** survey rendering mode, instructions text is not displayed in the survey. Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

3. Create a **List Caption** (optional), and then click **OK**.
4. On the **Text** tab, create your first **Step Label** by typing the name.

   > You will actually see the words **Step Label** in the text box. Replace the text with your own label name.

   In the example below, **Step Label** is replaced with **Genre**, and three choices are added to the choice text box.
5. To activate the **New**, **Edit**, and **Delete** buttons, click the **Add Step** link.

   > When you click **Add Step**, a new step text box is added to the right of the current step label text box, so that you can continue your hierarchical steps.

   You can specify the sort order of your choices on the **Sort** menu. With the **User Defined** sort order, you can change the choices order by clicking the arrows next to each choice.
6. To add a sublist to any choice (that you have just added), select one of your choices in the first step list, and then click **Add Step**.

   For example, select the genre of your choice, and it displays with a green highlight. Click the **New** button (under the second Step Label), and the **Add Multiple Choices** dialog box opens. Enter each choice in a separate line in the text box, and then click **OK**. Your choices are added into the next step label text box.

   > You can specify Choice Values for your Choice Names by entering [Choice Label]=[Choice Value], for example, English=EN. A Choice Value is stored as the response and is displayed in the response manager and reporting. If no Choice Value is entered, the Choice Name is used as the Choice Value.

7. Type in a **Step Label** for your sublist.
   Continue this process until you have completed all hierarchical choices and added all your steps and sublists.
8. To save, click **OK**.

For the **Modern** survey rendering, you can choose not to display the steps with 1 or 0 items in a survey by selecting the **Hide steps with 1 or 0 items in the list from rendering in Survey** check box at the bottom of the **Text** tab.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

Preview a hierarchical question

You can preview your hierarchical question by clicking the **Preview** tab. You can access the **Preview** tab when creating a new hierarchical question or editing an existing one.

Create a hierarchical question with the Web Service option

Procedure

1. Go to the **Library** page > **Library** tab > **Hierarchical Question** tab > click **New**.
2. On the hierarchical question editing page, enter a name for your question, your **Question Heading** text, and add your question to the **Question Text** area.
3. Create a **List Caption** (optional).
4. Select the **Web Service** tab.
5. Type in the URL of your Web Service Database.
6. Type in the Step Labels (one per line, for example, Make, Model, Year).
7. To confirm, click **OK**.
   To terminate the action, click **Cancel**.

The **Web Service** option is used to integrate with your Web Service client. If you need more information about Web Services, contact the EFM Services Department.

Example of using a Web Service

For example, you create a Web Service call that gets a list of choices from an external database. When your survey participant selects a choice from step one, the Web Service is called with that choice as an argument, it then goes to the external database, takes the choices associated with that list, and populates the next step's drop-down.

The same process occurs when your participant selects a choice from second step's list. Again the Web Service is called with that choice as an argument, goes to the external database, takes the choices associated with that list, and populates the next step. This process will continue based on how many steps are in your hierarchical question. Each time a step needs to be populated with choices, your Web Service is called.

See Also Reference: The W3C defines a Web Service as a software system designed to support interoperable machine-to-machine interaction over a network. Web Services are frequently just Web APIs that can be accessed over a network, such as the Internet, and executed on a remote system hosting the requested services. Web Service definition can be found on the following Wikipedia Web site: http://en.wikipedia.org/wiki/Web_service

Add a hierarchical question to a survey

Procedure

1 On the **My Surveys** page, create a new survey or open a saved survey.

2 On the **Design** tab, in the **Add a Question** panel, click **Add from Library**.

3 In the **Insert Item** dialog box, click the **Hierarchical Questions** tab.

4 Select the check box next to the hierarchical question that you want to add to the survey.
You can select multiple questions to be added at a time in the order they appear in the **Questions** list.

> You can preview the selected question in the right pane.

5 Click **OK**.

Edit a hierarchical question

Procedure

1 Go to the **Library** page > **Library** tab > **Hierarchical Question** tab.

2 On the **Hierarchical Questions** page, click the name of the hierarchical question that you want to edit.

3 On the hierarchical question editing page, make your changes, and then go back to the **Library** page.

> If the hierarchical question has been published in a survey, you can no longer add or remove steps in it. Changes to step lists are reflected immediately in the published survey.

Previewing a Hierarchical Question

Navigation

Library tab > **Hierarchical Questions** tab > **Hierarchical Questions** page > create a new question or open an existing one > **Preview** tab.

You can preview your hierarchical question by clicking the **Preview** tab. You can also view a translation for your hierarchical question by selecting the corresponding language in the **Language** list.

On the **Preview** tab, a hierarchical question is displayed as in the **Modern** survey rendering.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

The **Preview** feature is only available with the Enterprise edition of EFM. If you want to upgrade from Professional to Enterprise, see Contact us, page 50 for company contact information.

To see how the **HierarchicalQuestion** works within your survey, you must first insert it, and then publish your survey.

Translate Hierarchical Question

Navigation

Library tab > **Hierarchical Questions** tab > **Hierarchical Questions** page > create a new question or open an existing one.

You can add translations to your hierarchical questions to ensure better survey experience for respondents with different language backgrounds.

Procedure

1. On the **Library** page, select the **Hierarchical Questions** tab.
2. Click the name of the hierarchical question that you want to translate.
   OR
   To create a new question, click **New**.
3. On the hierarchical question editing page, click the **Translations** tab.
4. To add the translation language for your hierarchical question, click the **Add Language** button.
5. To export your hierarchical question to the .csv, .xlsx, .xliff, or .zip file formats, click the **Export** button.

> To export and import the hierarchical question translation, follow the same procedures as for the survey translation export and import. For more information, see Translations import and export , page 429.

6. In the exported file, translate all the strings of the hierarchical question to the added language, and then save the file.

> You can add multiple languages to your hierarchical question and provide multiple translations in a single file.

7. To import the question translation back into the EFM product, click the **Import** button.

When translating a survey containing the hierarchical question into the corresponding language, the translated question appears in the survey translation editor.

Hierarchical Question "Required" option

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > create a new survey or open an existing one > **Design** tab > **Content** tab > **Add** menu or **Add a Question** section > click the **Validation & Logic** section > **Options** section > **Answer Required** check box.

You can make the hierarchical questions required. The **Answer Required** check box is available for you to require survey participants to answer the hierarchical questions. This option applies to the whole hierarchical question, which means that survey participants need to answer the full question before moving to the next page or submitting the survey.

You can view how your hierarchical question works within your survey in the **Test** or **Preview** mode.

Make all Hierarchical Questions required

Procedure

1. On the **Design** tab, click the **Bulk Edit** link.
2. In the dialog box, select the **Answer Required** check box.
3. Click the **Apply All** link.
   All questions in your survey become required.

Library Choice Lists tab

Navigation

Library tab > **Choice Lists** tab.

You can create a library of choice lists and use them later during your create-a-survey process. When you create a question in your survey and want to add response choices quickly, you can insert a choice list that you have previously created and saved in your library.

Add a choice list to your library

Procedure

1. On the **Library** tab, click the **Choice Lists** tab.
2. On the toolbar, click **New**.
3. In the **Add Library Responses** dialog box, enter a name for your choice list, and then type each choice on a separate line.
4. To save your changes, click **OK**.

Edit a choice list

Procedure

1. On the **Choice Lists** page, click the name of the choice list that you want to edit.
2. In the **Edit Library Responses** dialog box, make your changes, and click **OK**.

Delete a choice list

Procedure

1. On the **Choice Lists** page, select a check box next to the choice list that you want to remove, and click **Delete**.
2. In the confirmation dialog box, click **Delete**.

Duplicate a choice list

Procedure

1. On the **Choice Lists** page, select a check box next to the choice list that you want to duplicate.
2. Click **Duplicate**.

> To manage all choice lists, select the check box next to the **Name** title in the grid.
>
> You can sort your choice lists in ascending or descending alphabetical order by clicking the **Name** title on the toolbar.

Library AutoDropdowns

Navigation

Library tab > **AutoDropdowns** tab.

With the AutoDropdowns feature, you can create choice responses on a menu format. When you create a question in your survey you can insert the AutoDropdown list that you have previously created and filed in your library.

To manage the AutoDropdown lists, click the following buttons on the toolbar:

- **New** – Create a new AutoDropdown list.
- **Duplicate** – Duplicate the selected AutoDropdown list.
- **Delete** – Remove the selected AutoDropdown list.

AutoDropdowns can only be used with the **Fill in the Blank** and **Short Answer** questions.

Create an AutoDropdown

Procedure

1 Go to the **Library** tab > **AutoDropdowns** tab.

2 On the **Autodropdowns** page, click **New**.

3 In the **Add AutoDropdown** dialog box, enter the name for your AutoDropdown, and then type your options on separate lines.

You can specify Choice Values for your Choice Labels by entering [Choice Label]=[Choice Value], for example, English=EN. A Choice Value is stored as the response and is displayed in the response manager and reporting. If no Choice Value is entered, the Choice Label is used as the Choice Value.

4 To confirm, click **OK**.

Edit an AutoDropdown

Procedure

1 Select the AutoDropdown that you want to modify.

2 In the **Edit AutoDropdown** dialog box, make your changes, and then click **OK**.

Delete an AutoDropdown

Procedure

1 Select a check box next to the AutoDropdown that you want to remove, and then on the toolbar, click **Delete**.

2 In the confirmation dialog box, click **Delete**.

Duplicate an AutoDropdown

Procedure

1. Select a check box next to the AutoDropdown that you want to duplicate.
2. Click **Duplicate**.
   In the **AutoDropdown** grid, the duplicated AutoDropdown with "(2)" at the end of its name appears.

Library Page Blocks

Navigation

Library tab > **Page Blocks** tab.

You can define groups of multiple questions based on the type of survey being conducted. EFM can store these questions individually, but you can also group questions together as a page block that can be added to a survey to save time and ensure accuracy.

To manage the page blocks, on the toolbar click the following buttons:

- **New** – Create a new page block.
- **Delete** – Remove the selected page block.

The **Delete** button is active only when at least one page block in the grid is selected.

Create a new Page Block

Procedure

1. Go to the **Library** tab > **Page Blocks** tab.
2. On the toolbar, click **New**.
3. In the **Add Page Block** dialog box enter the title of a new page block in the **Name** text box. It is limited to 64 characters.
4. In the **Description** text box, enter how and when this page block should be used (optional).
5. Specify a **Category** for your page block.

   You can select a category from the list or create a new category list name by entering a new name in the text box.
6. In the **Questionnaire** list, select the questionnaire from your available surveys.
7. In the **Page Block** list, select the page block you want to insert.

   A portion of the page block is displayed in the preview.
8. Click **Add**.
   The page block appears in the grid.

Delete a Page Block

Procedure

1. Go to the **Library** tab > **Page Blocks** tab.
2. Select the check box next to the page block that you want to delete, and click **Delete**.
3. In the confirmation dialog box, click **Delete**.
   The selected page block is removed from the library.

Library Code Blocks

Navigation

Library tab > **Code Blocks** tab.

You can use code blocks to add your own JavaScript code to the survey. You can add code blocks to the library to reuse them in your surveys later.

To manage the code blocks, on the toolbar click the following buttons:

- **New** – Create a new code block.
- **Duplicate** – Duplicate the selected code block.
- **Delete** – Remove the selected code block.

> The **Duplicate** and **Delete** buttons are active only when at least one code block in the grid is selected.

Create a new code block

Procedure

1. Go to the **Library** tab > **Code Blocks** tab.
2. On the toolbar, click **New**.
3. In the **Add Code Block** dialog box, in the **Name** text box, enter the title of a new code block. It is limited to 64 characters.
4. Type your code, and then click **Add**.
   The code block appears in the grid.

Duplicate a code block

Procedure

1. Go to the **Library** tab > **Code Blocks** tab.
2. Select the check box next to the code block that you want to duplicate.
3. On the toolbar, click **Duplicate**.
   The duplicate of the code block appears in the grid below the original code block. The name of the duplicate is the original code block name followed by the next incremental number, for example, **Code Block (2)**.

Edit a code block

Procedure

1. Go to the **Library** tab > **Code Blocks** tab.
2. In the grid, click the name of the code block that you want to edit.
   The **Edit Code Block** dialog box opens.
3. Edit your code.

4 To save your changes, click **OK**.

Delete a code block

Procedure

1. Go to the **Library** tab > **Code Blocks** tab.
2. Select the check box next to the code block that you want to delete, and click **Delete**.
3. In the confirmation dialog box, click **Delete**.
   The selected code block is removed from the library.

Code Blocks – Role-based access

Navigation

Administration tab > **Roles** tab.

The survey administrator can control if the workgroup members can get access to adding and editing their custom code blocks.

By default, code blocks editing is enabled for the predefined roles and disabled for the custom roles.

When code editing is disabled for a user role, the **Code Block** functionality becomes hidden for the user in the following places:

- **Survey** designer page > **Design** tab > **Content** tab > **Add** menu
- **Survey** designer page > **Design** tab > **Content** tab > **Add** panel
- **Library** tab > list of tabs

If you do not have the permission to add and edit your custom code blocks, you can still add the predefined code blocks from library. The predefined code blocks cannot be edited. For more information on library questions, see the Adding other content from library, page 1269.

Procedure

1. On the **Roles** tab, click the name of the role that you want to edit.
2. On the **Edit Role** page, in the **Experience** section, select the **Edit Code Blocks** check box.
3. Click **Save**.

Library Text Blocks

Navigation

Library tab > **Text Blocks** tab.

Text block is a non-question content. You can add text blocks to the library to reuse them in your surveys later.

To manage the text blocks, on the toolbar click the following buttons:

- **New** – Create a new text block.
- **Duplicate** – Duplicate the selected text block.
- **Delete** – Remove the selected text block.

The **Duplicate** and **Delete** buttons are active only when at least one code block in the grid is selected.

Create a new Text Block

Procedure

1. Go to the **Library** tab > **Text Blocks** tab.
2. On the toolbar, click **New**.
3. In the **Add Text Block** dialog box, in the **Name** text box, enter the title of a new text block. It is limited to 64 characters.
4. Type your text.
   You can customize the text and add images or media by using the editing toolbar.
5. Click **Add**.
   The text block appears in the grid.

Duplicate a Text Block

Procedure

1. Go to the **Library** tab > **Text Blocks** tab.
2. Select the check box next to the text block that you want to duplicate.
3. On the toolbar, click **Duplicate**.
   The duplicate of the text block appears in the grid below the original text block. The name of the duplicate is the original text block name followed by the next incremental number, for example, **Text Block (2)**.

Edit a Text Block

Procedure

1. Go to the **Library** tab > **Text Blocks** tab.
2. In the grid, click the name of the text block that you want to edit.

3. In the **Edit Text Block** dialog box, edit your text.
   You can customize the text and add images or media by using the editing toolbar.
4. To save your changes, click **OK**.

Delete a Text Block

Procedure

1. Go to the **Library** tab > **Text Blocks** tab.
2. Select the check box next to the text block that you want to delete, and click **Delete**.
3. In the confirmation dialog box, click **Delete**.
   The selected text block is removed from the library.

Library Survey Templates tab

Navigation

Library tab > **Survey Templates** tab.

The **Survey Templates** tab displays templates that accompany the product and provides you the ability to add new templates. You can use a survey that you or other users have created as a template by adding it to your library. This feature makes creating surveys quicker and more efficient.

On the actions toolbar, the following options are available:

- **New** – Create a new survey template.
- **Delete** – Delete the selected survey template.

> Click the **Template** button to sort your survey templates in ascending or descending order.

Add a new template

Procedure

1. On the toolbar, click **New**.
2. In the **Add Library Template** dialog box, type a name for the template.
3. In the **Select a survey** section, select a survey to add as a template.
4. Click **OK**.
   Template is added to your library.

Use the template you added to your library

Procedure

1. Go to the **Surveys** tab, on the **New** menu, click **Use a Template**.
2. In the **Survey Templates** list, all survey templates from your library appear.
3. In the **Use a Template** dialog box, select the needed template, and then click **Create Survey**.

> An example of what the template looks like is provided in the **Preview** pane.

Delete a template

Procedure

1. Go to the **Survey Templates** tab.
2. Click the check box next to the template that you want to delete, and click **Delete**.

> You can only delete templates that do not have the lock icon .

3. Click **Delete**.

4 In the confirmation dialog box, click **Delete**.

Survey themes

Navigation

Library tab > **Survey Themes** tab.

Themes are used to quickly control the look and feel of your surveys using a CSS view or HTML format. You can create new themes, copy, edit, or delete your themes, and set your default theme for new surveys.

In the **Survey Themes** grid, the following columns are available:

- **Name** – Name of the survey theme.
- **Group** – Name of the survey theme group (**User Defined**, **Featured**, **Standard**, or **Legacy**).
- **Last Modified by** – Name of a user who last edited a survey theme.
- **Last Modified** – The last time when the survey theme was edited.
- **Default** – Denotes a survey theme set as default for all surveys.

> If a survey theme is marked with the locked icon, you cannot edit or remove it.

To manage tasks, use the following options on the toolbar:

- **New** – Create a new theme.
- **Duplicate** – Make a copy of a theme by selecting the check box next to the theme that you want to copy.
- **Set as Default Theme** – Set your default theme by selecting the check box next to the theme that you want as your default.
- **Delete** – Delete a survey theme by selecting the check box next to the theme that you want to delete.
- **Search** – Search for a survey theme by its name.

> You cannot edit original survey themes included in the EFM application. You must first duplicate an original theme and give the duplicated theme a new name before modifying it.

Create a survey theme

Navigation

Library tab > **Survey Themes** tab > click the **New** button.

You can create a new survey theme and control the look and feel of your surveys using a CSS view or HTML format. Your customized theme will work for all device types.

Procedure

1. On the **Survey Themes** page, click the **New** button.
2. To edit the default theme name, click **Untitled**.
3. In the **Survey Rendering** list, select the **Classic** or **Modern** survey rendering modes to support your ongoing or customized survey.

> Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

4. In the **Select a Base Theme** list, select the theme on which you want to create your custom theme.
5. On the **Fonts**, **Survey Colors**, **Button Colors**, **Images**, and **Miscellaneous** tabs, set options to customize the look and feel of your survey.
6. To view the survey appearance, click the **Preview in New Window** button.

> On the top of the page, you can click the **Return to Library** link to go back to the **Library** > **Survey Themes** page.

Create a survey theme in a CSS view

Procedure

1. On the **Survey Themes** page, click the **New** button.
2. On the **Create a Survey Theme** page, click the **CSS** button, and then click the **Upload** button.
3. In the **Upload** dialog box, click the **Choose file** button to select your CSS file.
4. To upload the CSS file for your survey theme, click **OK**.

> Go to the CSS Tutorial, page 1297 for tips on creating your own theme.

Create a survey theme in an HTML view

Procedure

1. On the **Survey Themes** page, click **New**.
2. On the **Create a Survey Theme** page, click the **HTML** button, and then click the **Upload** button.
3. In the **Upload** dialog box, click the **Choose file** button to locate your HTML file.
4. To upload the HTML file for your survey theme, click **OK**.

To save the current content as a file, and then use an alternate editor to make changes, click the **Download** button.

To replace the current tab content with the changes made with the alternate editor, click the **Upload** button.

Manage a survey theme

Navigation

Library tab > **Survey Themes** tab.

You can copy, delete, edit, and set your default survey theme.

Duplicate a survey theme

Procedure

1. On the **Survey Themes** page, select the check box next to the theme that you want to duplicate.
2. Click **Duplicate**.

> The name of the duplicated survey theme is the original survey theme name followed by the next incremental number, for example, “Cotton (2)." To edit the default theme name, click the name that you want to change.

Delete a survey theme

Procedure

1. On the **Survey Themes** page, select the check box next to the theme that you want to delete.
2. On the toolbar, click **Delete**.
3. In the confirmation dialog box, click **Delete**.

Edit a survey theme

Procedure

1. On the **Survey Themes** page, click the name of the theme that you want to edit.
2. To edit the CSS or HTML of a survey theme template, click the **CSS** or **HTML** buttons respectively.

> If you rename a theme, any surveys using that theme will revert to the default theme when the survey is republished.

Set your default theme

Procedure

1. On the **Survey Themes** page, select the check box next to the theme that you want to set as default.
2. Click **Set as Default Theme**.

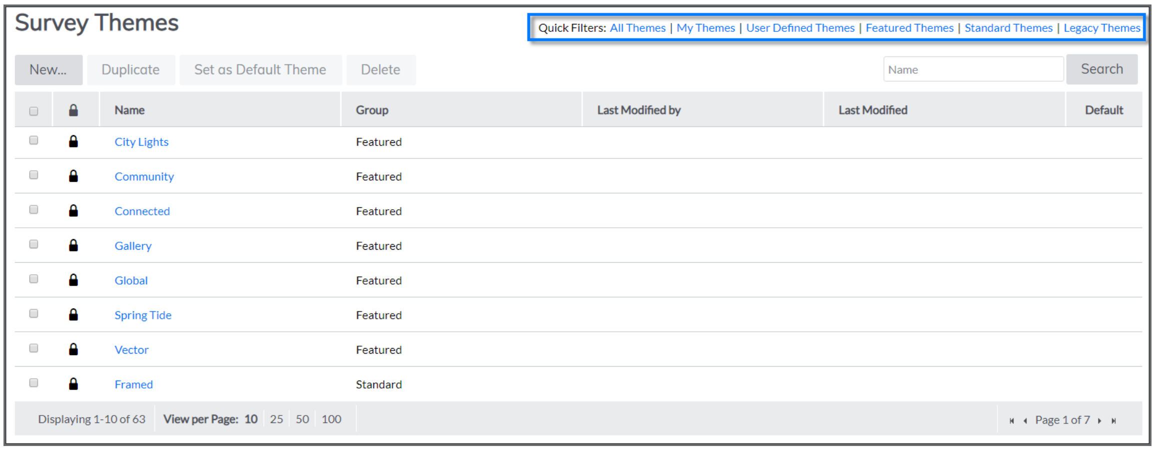
After you make a theme your designated to be default, a green check mark appears in the default column for that particular theme.

Survey themes quick filters

Navigation

Library tab > **Survey Themes** tab > **Survey Themes** page > **Quick Filters** option.

You can filter the survey themes by using the **Quick Filters** option. Quick filters are predefined filters you can use to quickly get to the survey themes you need.



The Quick Filters links

The following options are available:

- **All Themes** – View all the survey themes you have access to.
- **My Themes** – View all themes that you created.
- **User Defined Themes** – View only all the customized survey themes.
- **Featured Themes** – View only all the precreated featured survey themes.
- **Standard Themes** – View only all the precreated standard survey themes.
- **Legacy Themes** – View only all the precreated legacy survey themes.

Use the **Search** option to quickly find the required survey theme in the **Survey Themes** grid.

When you apply a filter to the survey themes, a notification describing the current filter appears above the **Survey Themes** grid. You can cancel the quick filter by using the **clear** link.

The Current Filter notification

Survey theme designer

Navigation

Library tab > **Survey Themes** tab > **Survey Themes** page > **New** button on the toolbar.

You can customize the appearance of your survey theme by setting particular options on the **Fonts**, **Survey Colors**, **Button Colors**, **Images**, and **Miscellaneous** tabs.

> You cannot use the Look and Feel view of a survey theme designer to set styles for the custom themes, created before the 8.0 release.

On the **Fonts** tab, select among a number of editing options for section heading, question heading, question text, response text, column headers, validation messages, and button labels. Standard options include:

- Font Name
- Bold
- Italic
- Underline
- Font Color

On the **Survey Colors** tab, select the necessary color in the RGB sliders (Red, Green, and Blue) and HSB (Hue, Saturation, and Brightness). The color of the following elements can be modified:

- Response (On Hover)
- Response (Selected)
- Check Box (Background)
- Radio Button (Background)
- Table Header
- Table Row (Odd)
- Table Row (Even)
- Table Border
- Accent Colors

> You cannot change the color of **Response(On Hover)** and **Response (Selected)** in the **Classic** survey rendering mode.

- Slider (Handle)
- Sloder (Selection)

On the **Button Colors** tab, change the color of text, background, border, background (on hover), and border (on hover) for the following buttons:

- Next Button
- Back Button
- Reset Button
- Save Button

- Jump Button

On the **Images** tab, change images for radio button (clear), radio button (selected), check box (clear), check box (selected), page background, logo, and star rating. You can also change the style of a page background. The following options are available:

- Fit Horizontal
- Fit Vertical
- Stretch
- Tile
- Center

Images for radio button (clear), radio button (selected), check box (clear), and check box (selected) should be 16x16 pixels for both **Classic** and **Modern** survey rendering modes. Larger images should be additionally customized.

Starting with the EFM 15.1 FP3, the **Classic** survey rendering is unavailable for new workgroups. In the future EFM releases, the **Classic** survey rendering will not be supported.

On the **Miscellaneous** tab, select the color in the RGB sliders (Red, Green, and Blue) and HSB (Hue, Saturation, and Brightness) for the following elements:

- Page Background
- Progress Bar (Incomplete)
- Progress Bar (Complete)
- Validation Message (Background)
- Validation Message (Border)

Survey themes – HTML template keywords

Navigation

Library tab > **Survey Themes** tab > **Survey Themes** page > **New** button on the toolbar > **HTML** view.

You can use the predefined HTML keywords to edit the HTML template of your survey theme.

HTML template keywords	Description
%PROGRESS_BAR%	Places the progress bar HTML at the given location.
%BUTTONS%	Places all survey buttons at the given location.
%TAG_LINE%	Places the tag line HTML at the given location.
%CONTENT%	Places the survey content at the given location.
%LOGO%	Places the logo HTML at the given location.
%FORM%	Is supported to enable the functioning of previously created themes.
%SURVEY_TITLE%	Is supported to make title shown in the survey by default.

If the %FORM% keyword is present in the template, all new keywords are ignored.
If the %FORM% keyword is missing in the template, the new keywords are used.

If the %SURVEY_TITLE% keyword is present, the survey title is rendered in its own <h1> outside the %CONTENT% placeholder.
If the %SURVEY_TITLE% keyword is missing, the survey title is rendered in a forced section heading inside the %CONTENT% placeholder.

CSS Tutorial

You can use CSS to customize the look and feel of your survey theme. For example, use CSS to adjust the position of elements on the screen or to change the background color of your survey theme. EFM enables you to upload your own CSS files. You can use the following elements in the CSS file you upload to EFM.

If you are creating your own CSS file, you will need these CSS elements in your CSS file for the Survey Themes to work. It is recommended that you use the EFM provided theme titled **Default** as the basis for new themes, as the essential structure for both CSS and HTML pages are provided. First, make a copy of the **Default** theme, rename the copy, and make the desired changes.

Global

CSS Element	What it modifies
.body	The entire document
.hr	The <hr /> horizontal lines
.h1	Heading format text

Questions

CSS Element	What it modifies
.section-heading	Section headings
.question-heading	Question headings
.question-text	Question text
.choice-text	Text labels of choices
.text-block	Non-question text blocks

Tables

CSS Element	What it modifies
.category-row	Table category rows

CSS Element	What it modifies
.anchor-row	Table category rows
.choice-row	Table choice rows
.total-row	Non-topic rows
.odd-row	Odd topic rows (3,5,7)
.even-row	Even topic rows (2,4,6)
.topic-text	Topic column

Progress Indicator (every progress indicator is made up of table cells)

CSS Element	What it modifies
.progress-table	Do not modify this unless you are very familiar with CSS
.completed-cell	Change the color of completed cells
.uncompleted-cell	Change the color of uncompleted cells

Properties

Click inside the { } braces on the line with the property you want to edit.
In the upper-right area of the screen, look for the property you want, for example:

CSS Property	What it modifies
background-color	Background color
font-family	Font name or font family name
font-size	Font size
font-style	Font style (bold, italic, etc.)

To learn more about CSS elements, visit the W3C's Web site below.
http://www.w3schools.com/default.asp

Report Themes

Navigation

Library tab > **Report Themes** tab > **Report Themes** page.

You can create new report themes, copy, edit, and delete the existing themes, and set the selected theme as your default theme for all your reports. Report themes help you to control the appearance of your report.

To manage the report themes, you can select the following options:

- **New** – Create a new theme in a report theme designer.
- **Duplicate** – Duplicate the selected report theme.
- **Set as Default Theme** – Set the selected theme as your default theme for all your reports.
- **Delete** – Remove a report theme from the library.
- **Search** – Search for a report theme by its name.

You cannot edit or delete the locked themes.

By default, the **Report Themes** grid shows the first 10 report themes. To view more saved report themes per page, click the **View per Page** option at the bottom of the **Report Themes** grid. Select the **25**, **50**, or **100** link to display more report themes. In addition, if the **Report Themes** grid is longer than one page, you can navigate between the pages clicking the navigation arrows in the lower-right corner.

For the steps on how to create and edit the report themes, see Report Theme Builder, page 1301.

Duplicate a Report Theme

Procedure

1. In the **Report Themes** grid, select the report theme that you want to copy.
   Once selected, the report theme is highlighted in brown.
2. On the toolbar, click **Duplicate**.
   A duplicate of the report theme appears in the right pane. The name of the duplicate is the original report theme name followed by the next incremental number, for example, Khaki (2).

Delete a Report Theme

Procedure

1. In the **Report Themes** grid, select a theme.
2. On the toolbar, click **Delete**.
3. In the confirmation dialog box, click **Delete**.

Edit a Report Theme

Procedure

1. In the **Report Themes** grid, click the name of the report theme that you want to edit. The report theme designer opens.
2. Make your changes. Your changes are saved automatically.

Set a Default Report Theme

Procedure

1. In the **Report Themes** grid, select a report theme.
2. On the toolbar, click the **Set as Default Theme** button.
   The selected report theme is set as your default theme for all your future reports.

> The check mark  appears in the **Default** column next to your default report theme.

Report Theme Builder

Navigation

Library tab > **Report Themes** tab > **Report Themes** page > click the **New** button > create a new theme or select an existing one > click the **Edit** button > report theme designer.

With the report theme designer, you can create and edit themes that specify default appearance and formatting properties for the report elements.

You can define properties for the various report elements and the overall theme using the following tabs:

- General Appearance, page 1301
- Chart Appearance, page 1302
- Table Appearance, page 1302
- Text Appearance, page 1303

General Appearance

On the **General Appearance** tab, you can select the template and background color for your report, add a logo, and specify the logo position in your report.

- **Template** – Use the list to select a template for your report.
  The default templates are as follows:
  - Cotton
  - Khaki
  - Worldwide Blue
  - Plain Color
  - Default
- **Background Color** – Select from a palette, the background color for your report. Select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value). If you know the hexadecimal value of a color, you can enter it manually or click **Custom Color** to adjust red, green, blue, hue, saturation, and black level values.

> The **Background Color** option is only active if the **Plain Color** option in the **Template** list is selected.

- **Choose Logo** – Click the button to add an image or a brand logo to your report. Click the **Clear** button to delete the logo image from the report
- **Logo position** – Use the list to select the logo position on the report page.
  The available options are as follows:
  - Right
  - Center
  - Left

Chart Appearance

The **Charts Appearance** tab includes the **Series Labels**, **Size**, **Border Style**, **Background Color**, and **Sentiment** sections, providing a number of customization properties.

- **Series Labels** – Section contains options to customize the labels font and appearance.
  - **Font** – Select the web-compatible fonts for your charts.
  - **Font Size** – Select the web-compatible font sizes for your charts.
  - **Font Color** – Select the font color for the chart report elements. Select from a range of colors in the Web Palette, RGB Sliders, HSB (Hue, Saturation, and Brightness), and HSV (Hue, Saturation, and Value).
  - **Label Rotation** – Define the label rotation angle in degrees.
  - **Max Characters** – Define the maximum number of characters for your charts.
- **Size** – Section contains options to customize the chart size.
  - **Width** – Define the width of your charts. Values you input into this field are measured in pixels.
  - **Height** –Define the height of your charts. Values you input into this field are measured in pixels.
- **Border Style** – Section contains options to customize the border of your charts.
  - **Border Color** – Select the border color of your charts.
  - **Border Width** – Adjust the border width of your charts. The available options are Default, Light, Medium, and Heavy.
  - **Border Radius** – Define the border radius of your charts. The available options are Default, Small, Medium, and Large.
- **Background Color** – Section contains options to customize the background color of your charts.
  - **Background Color** – Select the background color of your charts.
  - **Background gradient end** – Select the gradient color for the uppermost area of your charts.
  - **Series Palette** – Select a theme for the series in your chart by clicking the **Series Colors** button in the **Series Palette** dialog box, and then select color for each data point from a palette.
- **Sentiment** – Section contains options to customize the sentiment color in the text analytics elements.
  - **Positive** – Select the color of a positive sentiment.
  - **Neutral** – Select the color of a neutral sentiment.
  - **Negative** – Select the color of a negative sentiment.
  - **Category** – Select the color of the category in a heat map, for example.

Table Appearance

The **Table Appearance** tab includes the **Bar Colors**, **Table Headers**, and **Table Rows** sections, both providing a number of customization properties.

- **Use Series Colors from Frequency Charts** – Select the web-compatible fonts for the table headers and rows.
- **Series Palette** – Select a theme for the series in your table by clicking the **Series Colors** button in the **Series Palette** dialog box, and then select color for each data point from a palette. This option is active only when the **Use Series Colors from Frequency Charts** check box is clear.

- **Font** – Select the web-compatible fonts for the table headers and rows.
- **Font Size** – Select the web-compatible font sizes for data and header text.
- **Font Color** – Select the font color for the table headers and rows.
- **Header Background Color** – Select the background color for the table headers.
- **Row Background Color** – Select the background color for the table rows.

Text Appearance

The **Text Appearance** tab includes the **Question Text**, **Question Description**, **Caption** and **Text Element** sections, providing a number of customization properties.

- **Question Text** – Section contains options for your question text appearance.
  - **Show Question Heading** – Show the question heading.
  - **Show Question Text** – Show the question text.
  - **Question Text Font** – Select the web-compatible fonts for the question text in your report.
  - **Question Text Size** – Select the web-compatible font sizes for the question text in your report.
  - **Question Text Color** – Select the text color for the questions in your report.
- **Question Description** – Section contains options for your question description appearance.
  - **Show Question Description** – Show the question description text.
  - **Question Description Font** – Select the web-compatible fonts for the question description in your report.
  - **Question Description Size** – Select the web-compatible font sizes for the question description text.
  - **Question Description Color** – Select the text color for the question description in your report.
- **Caption** – Section contains options for the caption appearance.
  - **Caption Font** – Select the web-compatible fonts for the caption text.
  - **Caption Size** – Select the web-compatible font sizes for the caption text.
  - **Caption Color** – Select the text color for the caption.
- **Text Element** – Section contains options for the **Text** report element appearance.
  - **Text Font** – Select the web-compatible fonts for the **Text** report element.
  - **Text Size** – Select the web-compatible font sizes for the **Text** report element.
  - **Text Color** – Select the color for the **Text** report element.

Rename a Report theme

Procedure

1. Click the **Edit** link next to the report theme name.
   The theme name appears as a text field for editing.
2. Edit the report theme name.
3. To apply change, press **Enter**.

Add a logo to a Report heme

Procedure

1. Click the **Choose Logo** button.
2. In the **Picture** dialog box, select the image that you want to insert.
3. To edit the image, use the **Image Editor**.

> To select another image, click the **Upload** button.

4. Click **Insert**.

Locked library questions

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** grid > open an existing survey or create a new one > **Design** tab > add a locked library question to the survey > **Translation** tab > add the language into which you want to translate your survey or open any existing translation > translation editor.

You cannot edit the locked library questions in the translation module. This also applies to the locked hierarchical and profile questions. Locked questions are system questions that are secured and cannot be edited or deleted. Each locked question has the lock icon and the corresponding message next to it.

You can add translations to the hierarchical questions by clicking the **Translations** tab on the hierarchical question editing page. For more information, see Translate Hierarchical Question, page 1275.

Locked library, hierarchical, and profile questions are included in the calculation of the completion percentage in the translation module.

Image Manager

Navigation

Library tab > **Image Manager** tab > **Image Manager** page.

You can upload your images, place them in different folders, and edit them. You can insert the images into your survey questions, reports, themes, and so on. You can also remove the images you do not need anymore.

> The **Image Manager** page is available only if the **Allow User Media** permission is activated for the user role.

On the **Image Manager** page, you can find the following folders:

- **User Media** – The images and media added by a specific user. This folder is only available if the **Allow User Media permission** is activated for the user role.
- **Group Media** – The images and media for a workgroup. You can upload images and media to this folder if the **Upload Group Media** permission is activated for the user role.

You can also view the following information on the image:

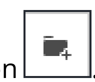
- **Filename** – The name of the file.
- **Size** – The size of the file measured in bytes.
- **Last Modified** – Last time the file was changed.

You can click the image name in the grid to preview it in the right pane.

Add a new folder

Procedure

1 On the **Library** > **Image Manager** page, select the folder, for which you want to create a folder.

2 On the **Image Manager** toolbar, click the **New Folder** icon .

> You can also right-click the folder, and then click **New Folder** to create a new folder.

3 In the **Enter the new folder name** dialog box, edit your folder name.

4 Click **OK**.
A new folder appears.

> You can create subfolders under Group Media if you have the **Upload Group Media** permissions.

Rename a folder or file

Procedure

1 On the **Library** > **Image Manager** page, right-click the folder or file that you want to rename.

2 Click **Rename**.

3 Edit the your folder name, and then click **Enter**.
Your folder is renamed.

> You can rename the **Group Media** folders if you have the **Delete Group Media** permissions.

Delete a folder or file

Procedure

1 On the **Library** > **Image Manager** page, select the folder or file that you want to delete.

2 On the **Image Manager** toolbar, click the **Delete** icon .

3 In the confirmation dialog box, click **OK**.
The folder is deleted.

> You can delete the **Group Media** folders if you have the **Delete Group Media** permissions.

Upload an image to the Image Manager

Procedure

1 On the **Library** > **Image Manager** page, select the folder to which you want to upload the image.

2 On the **Image Manager** toolbar, click the **Upload** icon . The **Upload** dialog box opens, where you can find the information on the maximum file size and extensions allowed.

3 Click the **Select** button to locate your image.

4 Select the image, and then click **Open**.

> To add many images at once, click the **Add** button. You can also choose to overwrite the images with the same file name by selecting the **Overwrite if the file exists** check box.

5 Click the **Upload** button.
The image appears in the folder.

Edit the image

Procedure

1 On the **Library** > **Image Manager** page, select the image that you want to edit.

2 Click the **Edit** link below the image preview.

3 In the **Edit Image** dialog box, customize your image by using various editing options on the toolbar.

4 To apply your changes, click **Save**.

Media Manager

Navigation

Library tab > **Text Blocks** tab > **Media Manager** tab > **Image Manager** page.

You can upload your media and place them in different folders. You can insert the media into your survey questions, reports, themes, and so on. You can also remove the media you do not need anymore.

> The **Media Manager** page is available only if the **Allow User Media** permission is activated for the user role.

On the **Media Manager** page, you can find the following functionalities:

- **User Media** – The media added by a specific user. This folder is only available if the **Allow User Media** permission is activated for the user role.
- **Group Media** – The media for a workgroup. You can upload media to this folder if the **Upload Group Media** permission is activated for the user role.

You can also view the following information on the media:

- **Filename** – The name of the file.
- **Size** – The size of the file measured in bytes.
- **Last Modified** – Last time the file was changed.

Add a new folder

Procedure

1. On the **Library** > **Media Manager** page, select the folder, for which you want to create a folder.
2. On the **Media Manager** toolbar, click the **New Folder** icon .

> You can also right-click the folder, and then click **New Folder** to create a new folder.

3. In the **Enter the new folder name** dialog box, edit your folder name.
4. Click **OK**.
   A new folder appears.

> You can create folders under **Group Media** if you have the **Upload Group Media** permissions.

Rename a folder or file

Procedure

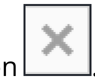
1. On the **Library** > **Media Manager** page, right-click the folder or file that you want to rename.
2. Click **Rename**.
3. Edit the your folder name, and then click **Enter**.
   Your folder is renamed.

You can rename the **Group Media** folders if you have the **Delete Group Media** permissions.

Delete a folder or file

Procedure

1 On the **Library** > **Media Manager** page, select the folder or file that you want to delete.

2 On the **Media Manager** toolbar, click the **Delete** icon .

3 In the confirmation dialog box opens, click **OK**.
The folder is deleted.

You can delete the **Group Media** folders if you have the **Delete Group Media** permissions.

Upload a media to the Media Manager

Procedure

1 On the **Library** > **Media Manager** page, select the folder to which you want to upload the media.

2 On the **Media Manager** toolbar, click the **Upload** icon 

.

3 In the **Upload** dialog box, you can find the information on the maximum file size and extensions allowed.

4 To locate your media, click the **Select** button.

5 Select the media, and then click **Open**.

To add many media at once, use the **Add** button. You can also choose to overwrite the media with the same file name by selecting the **Overwrite if the file exists** check box.

6 Click the **Upload** button.
The media appears in the folder.

Search for library items

Navigation

Library tab > **Questions**, **Hierarchical Questions**, **Choice Lists**, **AutoDropdowns**, **Survey Themes**, or **Report Themes** pages > **Search** field > search for the library items.

You can quickly find the required library items by their names.

> The **Search** option is only available for the following tabs: **Questions**, **Hierarchical Questions**, **Choice Lists**, **AutoDropdowns**, **Survey Themes**, and **Report Themes**.

Procedure

1. In the **Name** search field in the upper-right corner of the **Questions** grid, type the name of the library question that you want to find.
2. Click the **Search** button.
   Entries with a similar name appear in the **Questions** grid.

> To remove the current filter conditions, in the **Quick Search** notification message, click the **Clear** link.

Chapter 37

Unified VoC

Topics

Unified Data Set overview

You can combine multiple sources in the Unified Data Set and tie-in contextual information after the data is collected into a single entity for analysis and reporting purposes. You can combine these sources by mapping them to the Unified Data Model.

To combine data from the multiple sources into the Unified Data Set, and then analyze it, you must have **Unified VoC** license enabled for your workgroup.

Unified Data Model

With the Unified Data Model, you can define a set of values or fields to combine data from different sources by using the mapping capabilities. You can add questions from different internal and integrated projects such as surveys, file imports, comments, and ForeSee and Speech Analytics projects, and then combine them into a single data set.

Within the Unified Data Model, you can create the following values:

- **Core measures** – Numeric values that have the specific range of attributes that help to identify the positive, neutral, and negative feedback.
- **Dimensions** – Various forms of data that can be used in reporting to gain the critical insight on how they impact core measures.
- **Supplemental attributes** – Data entries that can help in qualitative analysis of the feedback and connection with a concerned individual.

Unified Data Source

Unified Data Sources are connections to other repositories where the mapped data is monitored for alerts, triggers, and some modest analysis. With the Unified Data Sources, you are able to build dashboards and reports based on their feedback, and take automatic action through Unified Data Model triggers.

Configure Unified Data Set

You can combine multiple sources in the Unified Data Set to use them for further analysis and reporting purposes. The main feature of the Unified Data Set is that you can define sources and areas that interest you the most, or where you want additional feedback or improvements. You can define these areas by creating the core measures, dimensions, or supplemental attributes on the **Unified Data Mode** page.

Workflow

1 Ensure that you have the **Unified VoC** module.

Make a request for the **Unified VoC** module to perform actions on the Unified VoC features.

The Unified Data Set functionality is only available for the workgroups with the Unified VoC license enabled. To enable the license, contact your System Administrator.

2 Ensure that you have the needed role permissions.

To verify that you have all necessary user role permissions, contact your System Administrator. Administrator can activate the Unified Data Set functionality for a user by creating a new role or editing the existing ones on the **Administration** tab > **Roles** tab.

3 Configure Unified Data Model.

Define the Unified Data Model by creating the core measures, dimensions, or supplemental attributes. You create these values according to your needs.

4 Publish your changes to use the data types from the Unified Data Model in the Unified Data Sources.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

5 Connect Unified Data Sources.

Unified Data Set supports the survey, file Import, comments, ForeSee and Speech Analytic project types.

a. Map data sources fields to the data types of the configured Unified Data Model.

b. Specify value mapping for the data fields with the **Choose One** or **Choose Many** questions.

c. Publish your changes to make them available for further reporting and analysis.

After you define the Unified Data Model values according to your needs, map them to the Unified Data Sources, and then publish them, the Unified Data Set project is created automatically. It is a virtual project where the mapped data is stored. This data becomes available in reporting, dashboards, and other features. You can also make it available for advanced analysis by using the Feedback Intelligence solution and create reports and dashboards from all sources that are joined together.

> If you apply any changes to the data that is already published, the Unified Data Set is updated automatically.

Overview page

Navigation

Unified VoC tab > **Overview** tab > **Sources** view.

The **Overview** page is a summary page to view and manage all connected sources to the Unified Data Set.

> The **Overview** page appears only if you have the **Unified VoC** license enabled and the **View** permission selected for Unified Data Sources.

The following sources are displayed in widgets if you have integration configured and enabled:

- Surveys
- Comments
- File Imports
- Speech Analytics
- ForeSee

If you do not have permissions for a particular source project, you will still see information about it in widgets having the **View** permission for Unified Data Sources.

Each widget displays a total number of sources connected to Unified Data Set of that type and the number of active sources of the particular type. Clicking the widget name redirects you to the **Unified Data Sources** page.

Unified data view page

Navigation

Unified VoC tab > **Overview** tab > **Data** view.

The Unified data view page allows viewing feedback data available in Unified Data Set, filter the data, and perform export of it.

On the **Responses** tab, you can show or hide particular columns, filter the data, export or schedule export of responses, and push them to FI.

The following columns are available for selection:

- Unified Data Set
- Respondent Fields
- Respondent System Information
- Respondent Location

You can export responses to CSV, TSV, Microsoft Excel, SPSS file formats, or schedule export by email, to folder, or to SFTP.

By clicking the **Actions** menu > **Filter** option, you can control what feedback data to display on the Unified data view page by defining custom filtering criteria. For example, you can exclude all responses that are larger than a certain value. Also, the Date Filter with the following options in the list is available: Clear All Date Filters, Today, Current Week, Current Month, Current Quarter, Current Year, Year to Date, Last Week, Last Month, Last Quarter, Last Year.

In the **Add Filter Criteria** dialog box, in the **Source** list, data from the current project, columns, and profiles are available for defining the filtering criteria.

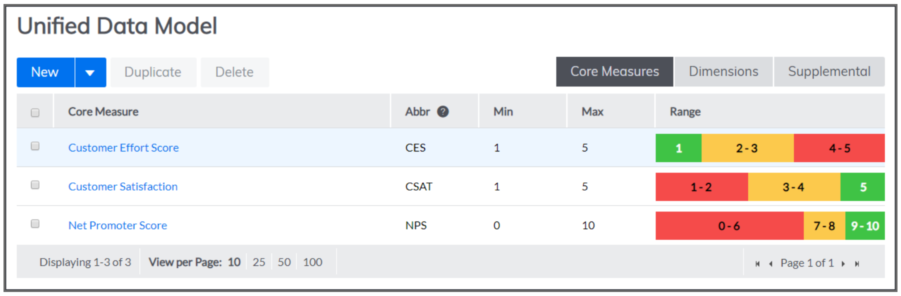
Unified Data Model page

Navigation

Unified VoC tab > **Unified Data Model** tab > **Unified Data Model** page.

You can view, create, edit, and delete the needed data types in a schema that can be mapped on the **Unified Data Model** page.

> The **Unified Data Model** page is available if the System Administrator activates the **Unified VoC** license for your workgroup and only if you have the **View** permission.



The Unified Data Model page

On the **Unified Data Model** page, the following options are available:

- **Core Measures** – Displays the list of the **Core Measures** values that you can view, create, edit, and delete according to your role permissions. This allows you to use them in the Unified Data Set.
- **Dimensions –** Displays the list of the **Dimensions** values that you can view, create, edit, and delete according to your role permissions. This allows you to use them in the Unified Data Set.
- **Supplemental – Displays** the list of the **Supplemental** values that you can view, create, edit, and delete according to your role permissions. This allows you to use them in the Unified Data Set.

When the **Core Measures** tab is selected, the following columns are available:

- **Core Measure** – Name of the core measure.
- **Abbr** – Shortened form for the core measure's name.
- **Min** – Maximum selected value for the core measure.
- **Max** – Minimum selected value for the core measure.
- **Range** – Highchart that displays the positive, neutral, and negative ranges according to the numeric values (red color for the negative, yellow for neutral, and green for positive). When you point to the appropriate range section, it becomes highlighted and the numeric values that define the negative, neutral, or positive range are displayed.

When the **Dimensions** tab is selected, the following columns are available:

- **Dimension** – Name of the **Dimension** value.
- **Data Type** – Type of the **Dimension** value to match the target question or field for mapping it on the **Unified Data Model** page.

- **Description** – Name or short explanation of the **Dimension** value.

When the **Supplemental** tab is selected, the following columns are available:

- **Supplemental Data** – Name of the Supplemental attribute.
- **Data Type** – Type of the **Supplemental** attribute to match the target question or field for mapping it on the **Unified Data Model** page.
- **Description** – Name or short explanation of the Supplemental attribute.

By default, the **Unified Data Model** grid shows the first 10 items. To view more saved items, use the **View per Page** option. Select the **25**, **50**, or **100** link to display more items. To navigate between the pages, click the navigation arrows in the lower right corner. The **Displaying # of #** option shows the number of current columns among the total number of columns.

Create new core measure

Navigation

Unified VoC tab > **Unified Data Model** tab > **Core Measures** tab > **New** button.

You can create the core measures if you have the appropriate permissions.

Core measures are numeric values that have the specific range of attributes with a help of which you can easily identify the positive, neutral, and negative feedback.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model** page, select the **Core Measures** tab.
3. To add a new core measure, click the **New** button.

> The **New** button is available only if you have the **View** and **Create** permissions.

4. In the **Add Core Measure** dialog box, enter the appropriate information.

   The following options are available:

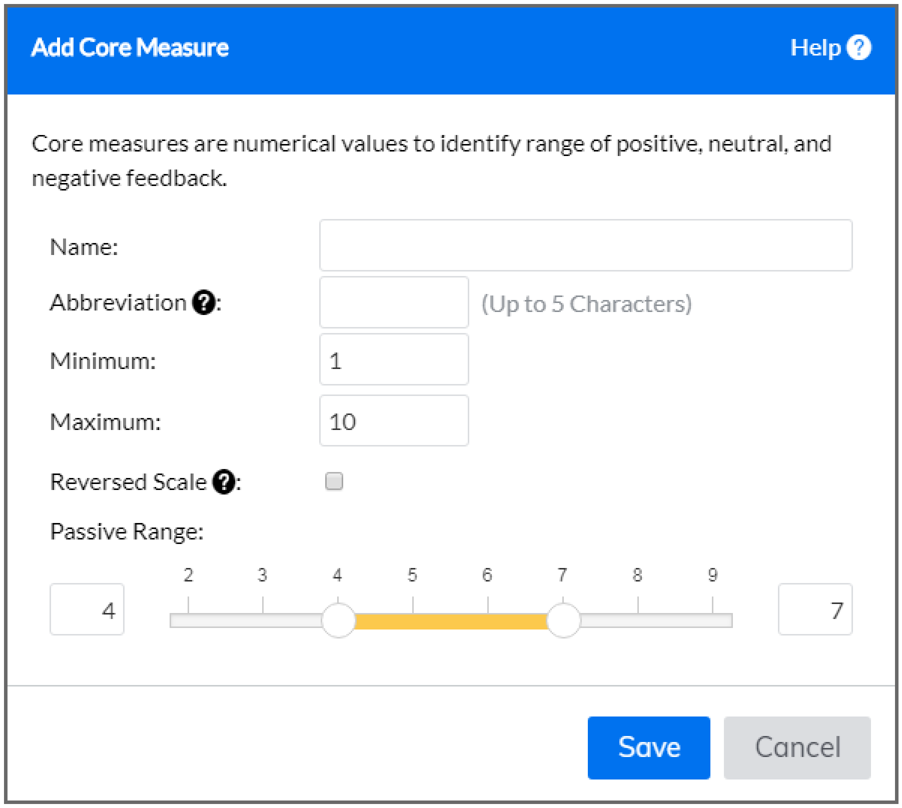
   - **Name** – Enter the name of the core measure.
   - **Abbreviation** – Enter the shortened form of the core measure's name.

> The maximum number of characters that you can enter in the **Abbreviation** text box is five.

   - **Minimum** – Define the minimum value for the core measure.
   - **Maximum** – Define the maximum value for the core measure.

> The maximum value should be at least two values greater than the minimum value.

   - **Reversed Scale** – Select the check box so the range of values from the positive to negative is measured in the reverse order.
   - **Passive Range** – Enter the range of values to define the neutral feedback for your core measure.



The Add Core Measure dialog box

5 Click **Save**.

The new item is added to the **Core Measures** grid.

> When you click the title of a core measure, the **Edit Core Measure** dialog box opens where you can edit the core measure information.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Delete core measure

Navigation

Unified VoC tab > **Unified Data Model** tab > **Core Measures** tab > **Delete** button.

You can delete the previously created core measures.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the**Unified Data Model** page, select the **Core Measures** tab.
3. In the **Core Measures** grid, select the check box next to the item that you want to delete.
4. Click the **Delete** button.

> The **Delete** button is available only if you have the **View** and **Delete** permissions.

5. In the confirmation dialog box, click **Delete**.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Duplicate core measure

Navigation

Unified VoC tab > **Unified Data Model** tab > **Core Measures** tab > **Duplicate** button.

You can duplicate the previously created core measures.

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Model** tab.

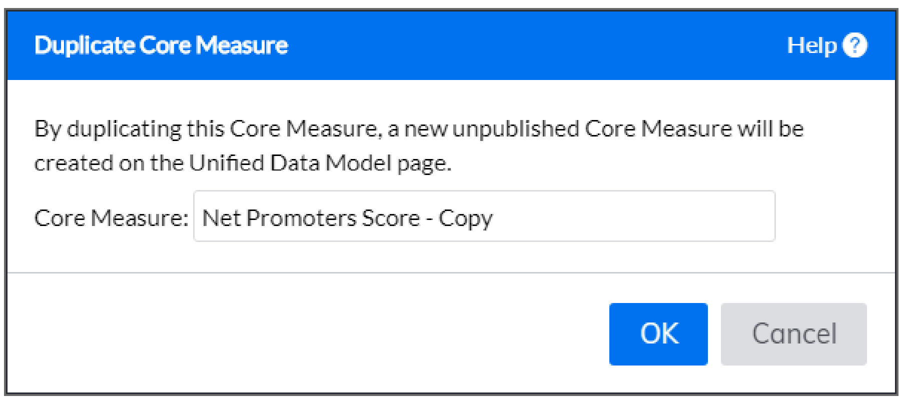
2 On the **Unified Data Model** page, select the **Core Measures** tab.

3 In the **Core Measures** grid, select the check box next to the item that you want to duplicate.

4 Click the **Duplicate** button.

> The **Duplicate** button is available only if you have the **View**, **Create**, and **Delete** permissions.

5 In the **Duplicate Core Measure** dialog box, enter the name of the core measure or leave the default one.



The Duplicate Core Measure dialog box

6 Click **OK**.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Create new dimension

Navigation

Unified VoC tab > **Unified Data Model** tab > **Dimensions** tab > **New** button.

You can create the dimensions if you have the appropriate permissions.

Dimensions are various forms of data and you can use them in reporting to get the information on how they impact the core measures.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model** page, select the **Dimensions** tab.
3. To add a new dimension, click the **New** button.

> The **New** button is available only if you have the **View** and **Create** permissions.

4. In the **Add Dimension** dialog box, enter the appropriate information.

   The following fields are available:

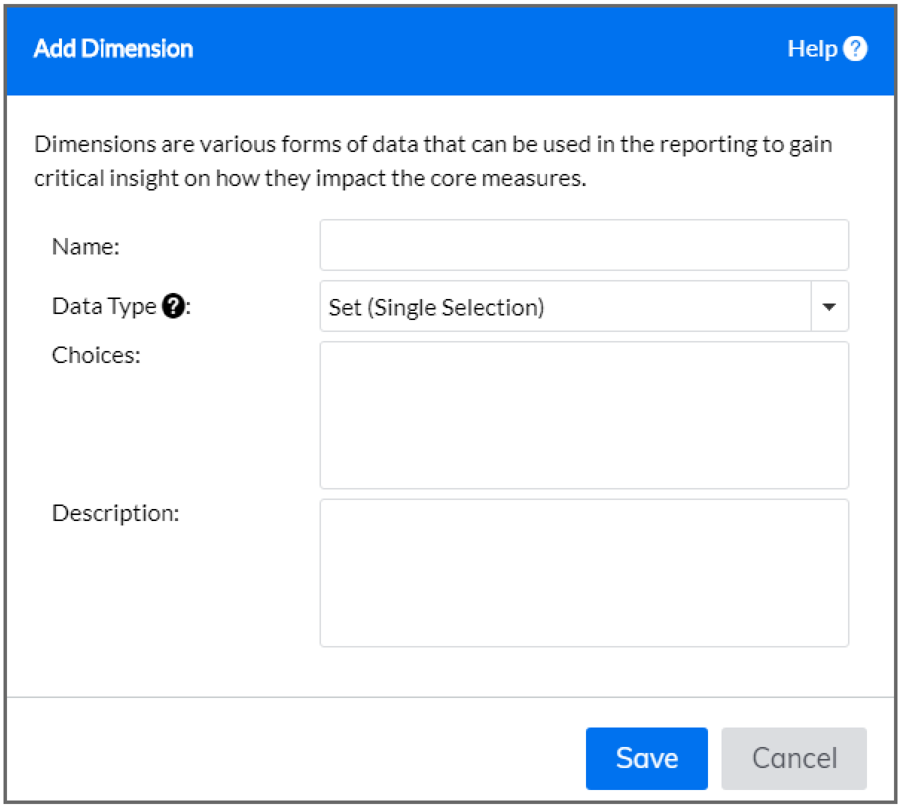
   - **Name** – Enter the name of the dimension.
   - **Data Type** – Select the type of the dimension to match the target question or field for mapping it on the **Unified Data Model** page.

     You can select among the **Text**, **Number (Whole Number)**, **Number (Real Number)**, **Set (Single Selection)**, **Set (Multiple Selection)**, and **Date** data types.
   - **Choices** – Specify the choice label for your dimension.

     Multiple choice labels should be separated by pressing Enter. The specified labels will be displayed in the **Description** column with a comma.

> The **Choices** text box is available only if the **Set (Single Selection)** or **Set (Multiple Selection)** data type is selected.

   - **Description** – Enter the name or short explanation of the dimension.



The Add Dimension dialog box

5 Click **Save**.

The new dimension is added to the **Dimensions** grid.

When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Delete dimension

Navigation

Unified VoC tab > **Unified Data Model** tab > **Dimensions** tab > **Delete** button.

You can delete the previously created dimensions.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model** page, select the **Dimensions** tab.
3. In the **Dimensions** grid, select the check box next to the item that you want to delete.
4. Click the **Delete** button.

> The **Delete** button is available only if you have the **View** and **Delete** permissions.

5. In the confirmation dialog box, click **Delete**.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Duplicate dimension

Navigation

Unified VoC tab > **Unified Data Model** tab > **Dimensions** tab > **Duplicate** button.

You can duplicate the previously created dimensions.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model** page, select the **Dimensions** tab.
3. In the **Dimensions** grid, select the check box next to the item that you want to duplicate.
4. Click the **Duplicate** button.

> The **Duplicate** button is available only if you have the **View**, **Create**, and **Delete** permissions.

5. In the **Duplicate Dimension** dialog box, enter the name of the dimension or leave the default one.
6. Click **OK**.

> When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Create new Supplemental attribute

Navigation

Unified VoC tab > **Unified Data Model** tab > **Supplemental** tab > **New** button.

You can create the supplemental attributes if you have the appropriate permissions.

Attributes are supplemental data entries that can help you in qualitative analysis of the feedback and connection with a concerned individual.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model**page, select the **Supplemental** tab.
3. To add a new supplemental attribute, click the **New** button.

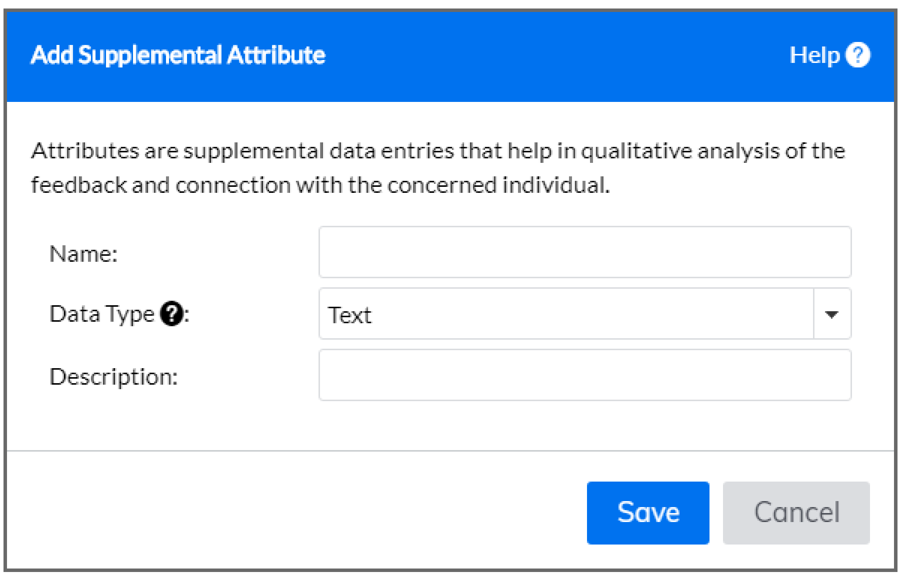
The **New** button is available only if you have the **View** and **Create** permissions.

4. In the **Add Supplemental Attribute** dialog box, enter the appropriate information.

   The following fields are available:

   - **Name** – Enter the name of the attribute.
   - **Data Type** – Select the type of the attribute to match the target question or field for mapping it on the **Unified Data Model** page.

     You can select among the **Text**, **Email Address, Number (Whole Number)**, **Number (Real Number)**, **Phone Number**, **Date**, and **Essay** data types.
   - **Description** – Enter the name or short explanation of the attribute.



The Add Supplemental Attribute dialog box

When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Delete Supplemental attribute

Navigation

Unified VoC tab > **Unified Data Model** tab > **Supplemental** tab > **Delete** button.

You can delete the previously created supplemental attributes.

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Model** tab.

2 On the **Unified Data Model** page, select the **Supplemental** tab.

3 In the **Supplemental** grid, select the check box next to the item that you want to delete.

4 Click the **Delete** button.

The **Delete** button is available only if you have the **View** and **Delete** permissions.

5 In the confirmation dialog box, click **Delete**.

When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

Duplicate Supplemental attribute

Navigation

Unified VoC tab > **Unified Data Model** tab > **Supplemental** tab > **Duplicate** button.

You can duplicate the previously created supplemental attributes.

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Model** tab.

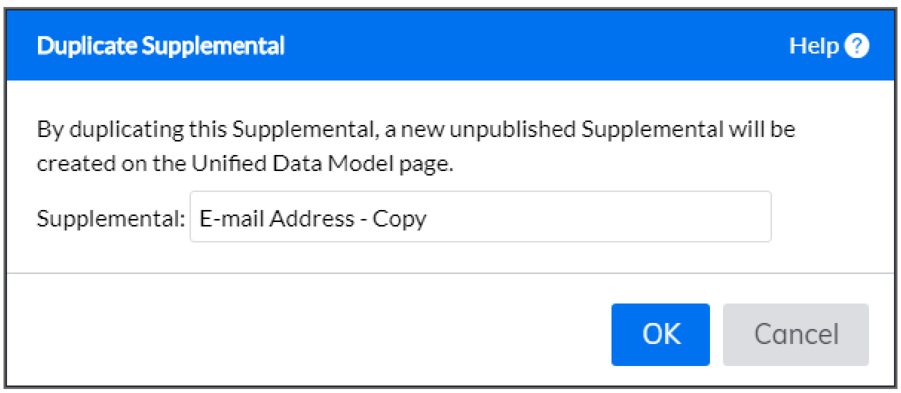
2 On the **Unified Data Model** page, select the **Supplemental** tab.

3 In the **Supplemental** grid, select the check box next to the item that you want to duplicate.

4 Click the **Duplicate** button.

The **Duplicate** button is available only if you have the **View**, **Create**, and **Delete** permissions.

5 In the **Duplicate Supplemental** dialog box, enter the name of the dimension or leave the default one.



The Duplicate Supplemental dialog box

6 Click **OK**.

When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Yes**. To cancel your changes, click **Revert**.

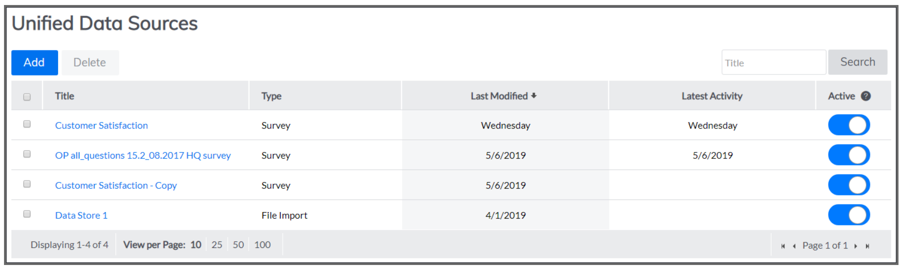
Unified Data Source page

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page.

You can view, add, and edit the projects and map their data types from the configured Unified Data Model to add them to the Unified Data Set.

> The **Unified Data Sources** page is available if the System Administrator activates the **Unified VoC** license for your workgroup and only if you have the **View** permission.



The Unified Data Source page

On the **Unified Data Sources** page, the following columns are available:

- **Title** – Type of a project. It can be a survey, comment, Speech Analytics project, or file import.
- **Last Modified** – Date and time when the project was last modified.
- **Latest Activity –** Date and time when the latest activity to a project was performed.
- **Active –** Toggle with a help of which you can determine whether the source is active.

> You can sort your sources by the title and the date when they were last modified.

To search for the specific source, type a partial or whole source name in the search box, and then click the **Search** button. The list of sources that match your input are displayed.

By default, the **Unified Data Sources** grid shows the first 10 sources. To view more saved sources, use the **View per Page** option. Select the **25**, **50**, or **100** link to display more sources. To navigate between the pages, click the navigation arrows in the lower right corner. The **Displaying # of #** option shows the number of current columns among the total number of them.

Add a new source

Navigation

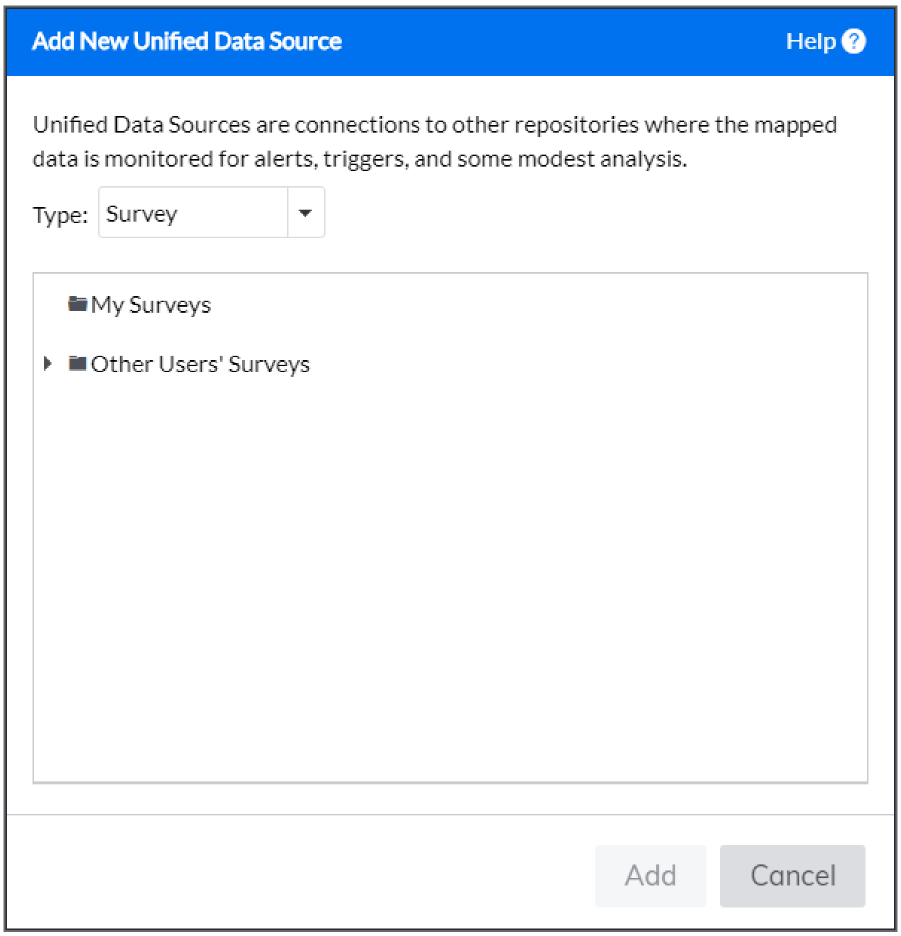
Unified VoC tab > **Unified Data Sources** tab > **Add** button.

You can add new sources to the Unified Data Set and map their data types to the configured Unified Data Model.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2. On the **Unified Data Sources** page, click the **Add** button.
3. In the **Add New Unified Data Source** dialog box, in the **Type** menu, select the type of a project to be added as a source.
4. Select the needed project from the list of all available projects.

   You can select from the following project types: survey, comment, ForeSee and Speech Analytics project, or file import.



The Add New Unified Data Source dialog box

If the project is already added as a source, it is dimmed and you cannot select it again.

5 Click **Add**.

When you click the **Add** button, you will be redirected to the **Data Mapping** page. For more information, see Map data from the Unified Data Model, page 1336.

Deactivate a source

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page.

You can deactivate a source to control the updates that will be included in the Unified Data Set.

When you publish the data for the particular source, the toggle next to this source on the **Unified Data Sources** page becomes active by default. You can deactivate the source to control the updates to the Unified Data Set as well as exclude the response or feedback data from the reports and dashboards without reimporting them to the Unified Data Set.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2. On the **Unified Data Sources** page, turn off the toggle next to the source that you want to deactivate.
3. In the confirmation dialog box, click **Deactivate**.

   Now, the source is deactivated and the Unified Data Set will not be updated with new records.

Delete a source from the Unified Data Set

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page > select a channel > **Delete** button.

You can delete sources that you do not need to use anymore. When a source is deleted, its records are removed from the Unified Data Set.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2. In the **Unified Data Sources** grid, select the check box next to the source that you want to delete from the Unified Data Set.
3. Click the **Delete** button.

> The **Delete** button is available only if you have the **View** and **Delete** permissions.

4. In the confirmation dialog box, click **Delete**.

   Now, all records from the source are removed from the Unified Data Set, reporting, dashboards, and other features, but you can add them later. For more information, see Add a new source, page 1332.

Map data from the Unified Data Model

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page > create a new source or open an existing one > **Data Mapping** tab.

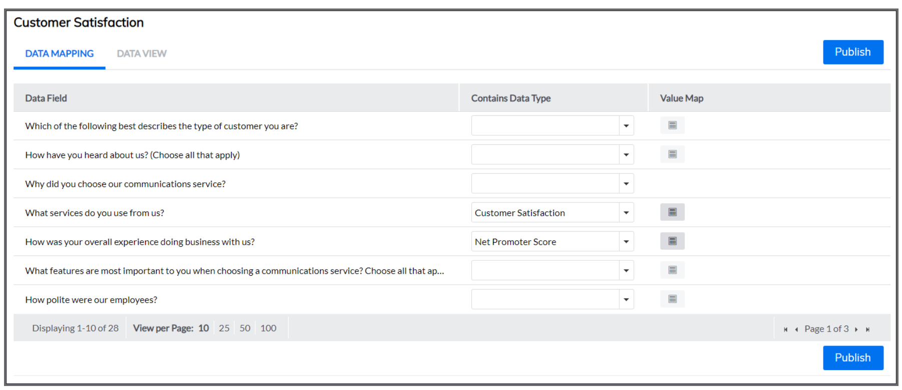
You can map data from the Unified Data Model to specify which question or field corresponds to the Unified Data Set.

You can map data while you are creating a source, or click the title of existing source, and then you are redirected to the Data Mapping tab.

For more information, see Add a new source, page 1332.

In the **Data Mapping** grid, the following columns are available:

- **Data Field** – Contains the list of each field that is present in the data source that will be mapped.
- **Contains Data Type** – Contains the list of Unified Data Model fields. It can be a core measure, dimension, or supplemental attribute.
- **Value Map** – Click the calculator icon to specify value mapping for the data fields with the **Choose One** or **Choose Many** questions.



The Data Mapping tab

Procedure

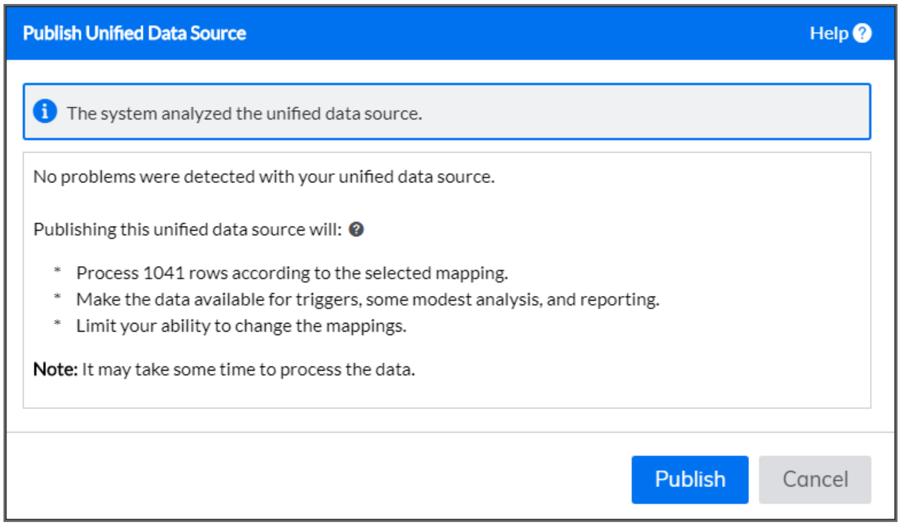
1. Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2. In the **Unified Data Sources** grid, click the source to which you want to map the data.
3. On the **Data Mapping** tab, in the **Contains Data Type** column, select the core measure, dimension, or supplemental that contains the required data type.
4. Specify value mapping for the data fields with the **Choose One** or **Choose Many** questions by clicking the icon. For more information, see Specify value mapping, page 1339.
5. Click the **Publish** button.

> The **Publish** button is active when at least one value is mapped.

6. In the **Publish Unified Data Source** dialog box, click **Publish**.

Now, the mapped data is available in the Unified Data Set.

> When you publish the data for a particular source, the toggle next to this source on the **Unified Data Source** page becomes active by default.



The Publish Unified Data Source dialog box

> When you click the **Publish** button, you are redirected to the **Data View** tab. For more information, see Data View tab, page 1341.

When you make any changes to the Unified **Data Model** values that are already mapped to the Unified Data Set, you receive the warning message. It says that your changes may affect the mapping for the Unified Data Sources. If you confirm your changes, the Unified Data Set is updated accordingly.

To map comments to Unified Data Set by using Unified Data Sources, you must have the **OpinionLab** and **Unified VoC** licenses enabled. If the OpinionLab license expired, you will still see comments as Unified Data Sources and mappings will be the same, but publishing and importing will be unavailable. To import and publish data in a comment, activate the **OpininoLab** license.

Predefined values of the Unified Data Model

Navigation

Unified VoC tab > **Unified Data Model** tab > **Unified Data Model** page.

The EFM application contains a number of predefined values for the Unified Data Model. It allows you to save time on the creation of most commonly used data fields that are needed for reports. Each predefined value includes a defined set of parameters.

The following predefined core measures are available:

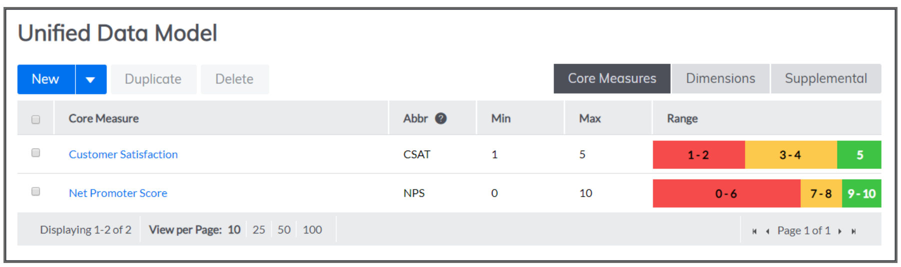
- **Net Promoter Score**
- **Customer Satisfaction**

The following predefined dimension is available:

- **Feedback Date**

The following predefined Supplemental values are available:

- **E-mail Address**
- **Phone Number**



Predefined core measures

Specify value mapping

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page > open a source > **Data Mapping** view > icon.

You can specify value mapping for the data fields with the Choose One or Choose Many questions by clicking the icon.

The **Calculator** icon is available only when the **Contains Data Type** list is filled and **Choose One** or **Choose Many** question type is selected.

If not all question choices are mapped to the Unified Data Set, you will see the icon next to the appropriate data field. You need to specify choice values to receive the complete results.

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Sources** tab.

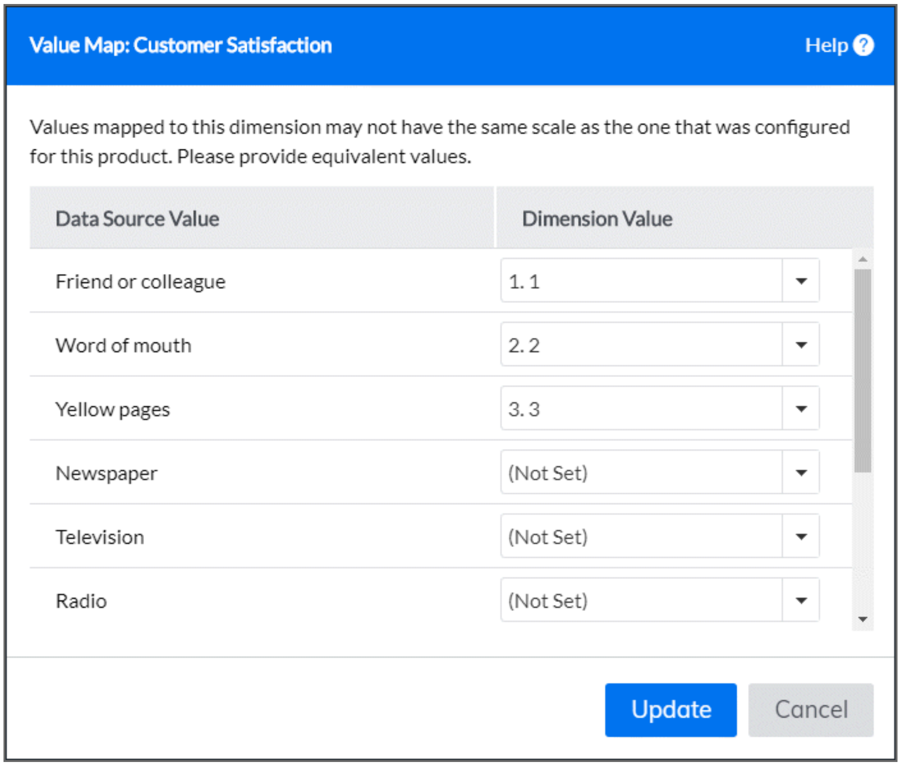
2 In the **Unified Data Sources** grid, open the needed source.

3 If the data is already mapped, in the **Data Mapping** view, click the icon next to the field that includes the **Choose One** or **Choose Many** question type.

4 If the data is not mapped yet, in the **Contains Data Type** column, select the core measure or dimension that contains the required data type, and then click the icon.

For more information, see Map data from the Unified Data Model, page 1336.

5 In the **Value Map** dialog box, specify the choices values.



The Value Map dialog box

6 Click **Publish**.

If you specify the value mapping for the **Choose One** question, you can select one value for the data source value multiple times. For the **Choose Many** question, you can select one value for the data source value only once.

When you update the mapping, the data source becomes unpublished. To apply changes, you should click the **Publish** button.

When the source is published, all the value mappings are processed and the Unified Data Set is updated automatically.

Data View tab

Navigation

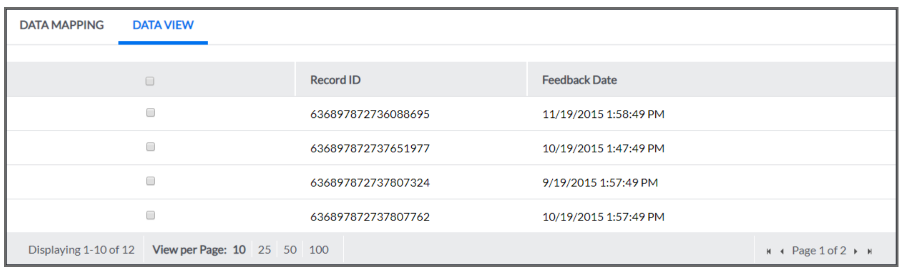
Unified VoC tab > **Unified Data Sources** tab > add a new source or open an existing one > **Data Mapping** tab > **Data View** tab.

You can view all records of the appropriate source after the data from the Unified Data Model was mapped and this source was published.

After you click the **Publish** button on the **Data Mapping** tab, you are redirected to the **Data View** tab.

For more information on data mapping, see Map data from the Unified Data Model, page 1336.

The **Data View** tab is available only if you have the **View** permissions and the source is published.



The Data View grid

The **Data View** grid shows all columns that were mapped to the fields on the **Data Mapping** tab. The **Record ID** column on the **Data View** grid represents the unique record identifier of the field from the Unified Data Model that was mapped.

By default, on the **Data View** grid, the first 10 items are shown. To view more saved items, use the **View per Page** option. Select the **25**, **50**, or **100** link to display more items. To navigate between the pages, click the navigation arrows in the lower right corner. The **Displaying # of #** option shows the number of current items among their total number.

Update the mapping

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page > select a source with mapped data > **Data Mapping** tab.

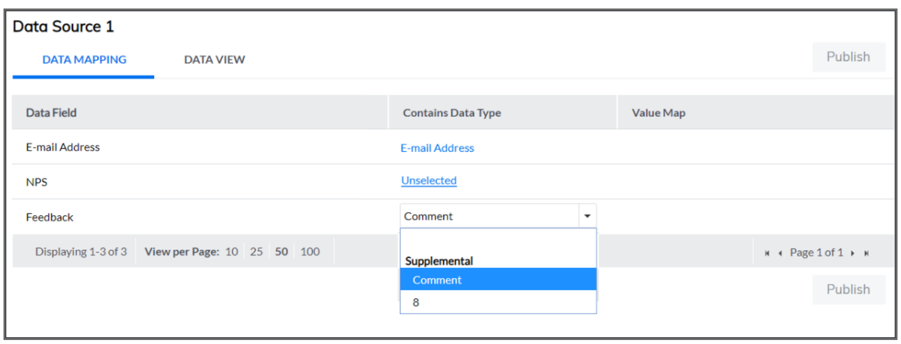
You can update the mapping for the source after it is published.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2. In the **Unified Data Sources** grid, select the source that already has the mapped data.
3. On the **Data Mapping** tab, in the **Contains Data Type** column, click the name of the value that you want to remap, and then, in the drop-down menu, select the new core measure, dimension, or supplemental.

   Name of the value is displayed as a link.
4. If you want to map the data field that was not mapped before, click the **Unselected** link, and then, in the drop-down menu, select the core measure, dimension, or supplemental that contains the required data type.
5. Click **Publish**.

When you click the **Publish** button, the Unified Data Set is automatically updated.



Updating the mapping

Push a Unified Data Set project to Feedback Intelligence

Navigation

Unified VoC tab > **Unified Data Sources** tab > **Unified Data Sources** page > select a source > **Push to Feedback Intelligence** button.

You can add and update your Unified Data Set project in Feedback Intelligence for advanced reporting by using the **Push to Feedback Intelligence** option.

Before you begin

- Publish the needed Unified Data Set project.
- Contact a System Administrator to add the Unified Data Set project to Feedback Intelligence. A System Administrator can also enable and disable the **Push to Feedback Intelligence** option for a certain project.

When you update the existing Unified Data Set project in Feedback Intelligence, changes that you made to the Unified Data Set project may affect the previously generated Feedback Intelligence universe, which may change or damage the existing reports.

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Sources** tab.

2 On the **Unified Data Sources** page, select the check box next to the source that you want to push to FI, and then click the **Push to Feedback Intelligence** button.

3 In the confirmation dialog box, click **OK**.
Your Unified Data Set project is marked to be updated in Feedback Intelligence.

When you update the Unified Data Set project, the warning message appears telling that the structure of the project is changed. The **Push to Feedback Intelligence** button becomes available on **Unified Data Sources** page and you should push the Unified Data Set project to FI again.

Configure Unified VoC to view feedback in Mobile Comment Stream

The mobile comment stream feature in the Experience Mobile application allows you to monitor customer feedback and identify potential customer experience issues. For more information on using the application see the Experience Mobile User Guide.

> To use this feature you must configure the **Unified Data Model** so that specific core measures are displayed along with comments (Essays) in the mobile comment stream feed.

Workflow

1. Ensure that you have the **Unified VoC** module.

   Make a request for the **Unified VoC** module to perform actions on the Unified VoC features.

   The Unified Data Set functionality is only available for the workgroups with the Unified VoC license enabled. To enable the license, contact your System Administrator.
2. Ensure that you have the needed role permissions.

   To verify that you have all necessary user role permissions, contact your System Administrator. Administrator can activate the Unified Data Set functionality for a user by creating a new role or editing the existing ones on the **Administration** tab > **Roles** tab.
3. Configure Unified Data Model.

   Define the Unified Data Model by creating the core measures (feedback) you want to display in the comment stream.
4. Publish your changes to use the data types from the Unified Data Model in the Unified Data Sources.
5. Connect Unified Data Sources.

   Create the data source (survey) and map the core measures you created, then publish your data source so the comment stream displays data.

Configure Unified Data Model for Mobile Comment Stream

The Unified Data Model must be configured with the core measures and attributes which are used to display customer feedback in the comment stream.

You must create a new **Essay** supplemental attribute. The attribute must be mapped to a core measure so that the comments appear with a score.

Procedure

1. Go to the **Unified VoC** tab > **Unified Data Model** tab.
2. On the **Unified Data Model** page select the **Supplemental** tab.
3. To add a new supplemental attribute, click the **New** button.

> The **New** button is available only if you have the **View** and **Create** permissions.

4 In the **Add Supplemental Attribute** dialog box, enter the **Name** and select **Essay** as the **Data Type**.
5 Click **Save** and check that your new attribute is displayed in the list.
6 Select the **Core Measures** tab.
7 Create a new core measure or edit an existing measure.
8 Select the **Mobile Comment Stream** check-box then in the Essay Question drop-down menu select your newly created supplemental attribute (of data type Essay).
9 Click **Save**.

You must now configure the Unified Data Source.

When you make any changes to the **Unified Data Model** page, the **Publish Changes** message appears. To apply your changes, click **Commit**, and then, in the confirmation dialog box, click **Continue**. To cancel your changes, click **Cancel**.

Configure Unified Data Source for Mobile Comment Stream

To create data for the comment stream you must add a survey as a new source to the Unified Data Set and map the data types to the configured Unified Data Model. The survey must contain at least one of the following:

- Choose One Question
- Essay Question

Procedure

1 Go to the **Unified VoC** tab > **Unified Data Sources** tab.
2 On the **Unified Data Sources** page, click the **Add** button.
3 In the **Add New Unified Data Source** dialog box, in the **Type** menu, select **Survey** as the type of project to be added as a source.
4 Select your survey from the list and click **Add**.
5 In the **Data Mapping** screen pick the first Choose One question and select your Core Measure in the **Contains Data Type** column.
6 Click the icon in the **Value Map** column and accept the default values displayed.
7 Click **Update**.
8 In the **Data Mapping** screen pick the first Essay question and select your Supplemental Attribute in the **Contains Data Type** column then click **Publish**.
9 In the **Publish Unified Data Source** dialog click **Publish**.

The mapped data is available in the Unified Data Set and can be viewed in the mobile comment stream.

Chapter 38

Administration

Topics

Administration tab overview

The **Administration** tab provides access to the following administrative tasks:

- Users, page 1349 – Add, import, delete users, and send email messages to a workgroup. You can also add or delete organizations in your workgroup and assign users to organizations.
- Roles, page 1378 – Add, modify, and delete roles that define permissions of users.
- Devices, page 1388 – Register your device for use with the EFM Mobile Offline App. Devices that can be used are the iPhone, iPad, and iPod Touch.
- Feedback Intelligence, page 1394 – View the contents of the Feedback Intelligence Folders table for the current workgroup. You can also view the list of users of your workgroup with the access to Feedback Intelligence.
- User Logs, page 1399 – View the transaction events specific to your workgroup.
- Unsubscribe List, page 1396 – Add panelists (and non-panelists) to this list that will be excluded from survey-based emails.
- Tasks–History view, page 1450 – Track tasks that have been performed by all users within a workgroup.

Users

Navigation

Administration tab > **Users** tab.

You can use the **Users** tab to add new users to a workgroup, import users from a .csv, .tsv, .xlsx, or .txt file, export users to a .csv, .tsv, or Microsoft Excel file format, edit, and remove existing users from a workgroup. On the **Users** page, you can find different information about the users.

The **Users** page shows a number of columns including:

- **User Name** – The name with which the user logs into the product.
- **Display Name** – The name of the user to display in the application.
- **Email –** The user's email address. This is usually used as the **From** address on invitations created by the user.
- **Organization** – The organization to which the user is assigned.
- **Role** – The user's security role.
- **Groups** - The groups to which the user is assigned.

On the toolbar, you can find the following functionality:

- **Actions** – On this menu, the following options are available:
  - **Add User** – Add a new user to a workgroup. You must have authority under the **Roles** tab to add users.
  - **Assign Membership** – Add selected individual users or groups of users to organizations assigned to your workgroup. One user can be a member of only one organization at a time. You can move users from one organization to another.
  - **Import** – Import users from a .csv, .tsv, .xlsx, .txt, or .zip file. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats.
  - **Export** – Export selected users to the .csv, .tsv, or Microsoft Excel file format.
  - **View User’s History** – View the login and logout dates and times for a particular user in the current workgroup.
  - **Notify User(s)** – Send an email notification to the selected users in the current workgroup.
  - **Reassign All Cases** – Assign the cases of the selected user to another user. You can reassign cases between users that belong to one organization.
  - **Delete** – Remove selected users from the workgroup.
- **New** – Add a new user to a workgroup. You must have authority under the **Roles** tab to add users.
- **Users**/**Organizations/Groups** – Toggle between the **Users**, **Organizations**, and **Groups** views.
- **Search** – Enter the name of the user you want to find in the text box and click the **Search** button next to the text box.

By default, the **Users** page shows the first 10 users. To view more items per page, use the **View per Page** option at the bottom of the **Users** page. Select the **25**, **50**, or **100** link to display more users. In addition, if the **Users** page is longer than one page, you can navigate between the pages by clicking the navigation arrows.

Adding a new user

Navigation

Administration tab > **Users** tab > **Users** page.

To add a new user to a workgroup, on the toolbar, click the **New** button. The **Add User** dialog box opens with the following tabs:

Basic Information

Define the basic information for a new user.

- **User Name** – Enter the name for the user to log into the application.
- **Display Name** – Enter the name for the user you want to display to other users.
- **Email** – Type the user's email address.
- **Language** – Select the language for the user from the list.
- **Default Workgroup** – Select the default workgroup for the user. If you are working with only one workgroup, that workgroup name displays. If you have multiple workgroups, select it from the list.
- **Status** – Select a user status from the list. The default is **Active**.
- **Time Zone** – Select a time zone from the list.

Extended Information

Define the additional information for a new user. On the **Extended Information** tab, you can find the following fields:

- Organization
- Department
- Country
- Province
- Fax
- Employee Count
- Registration Date
- Industry
- Job Title
- State
- Telephone
- Interests
- Registration Portal
- Referred By

Preferences and Settings

Define the settings for the preference mode, questionnaire designer, and the default report charts for a user. On the **Preferences and Settings** tab, you can customize the following functionality:

- **Predefined Settings** – Set the levels for the users based on their experience with the product on the **Preferences Mode** menu:
  - **Beginner** – Applies the recommended settings for a beginning user.
  - **Standard** – Applies the recommended settings for a user who is more comfortable with the application but who is not an expert.
  - **Expert** – Applies the recommended settings for an expert user, such as Free Form Word Processor and more rows displayed per page in any page with a grid view such as the **Response Manager** page.

After you select the preference mode from the list, click the **Load** button to apply the settings.

- **Questionnaire Designer**
  - Designer View
  - Display XML Tab
  - Display HTML Tab
  - Display DB Headings in Tree View
- **Default Report Charts**
  - Choose One
  - Choose Many
  - Matrix Question
- **Experience**
  - Email confirmation is required for processes exceeding: "n" (minutes)

For more details on the preferences and settings, see My Account page, page 1444.

Workgroup

Select the role and reviewer status for a user on the corresponding menus.

- **Workgroup** – The name of the workgroup to which the user is assigned.
- **Role** – Select the workgroup role for the user.
- **Organization Membership** – Select the organization you want the user to be the member of. If you change the user's workgroup, the user becomes the member of the root organization in the new workgroup.
- **Organization Access** – Select the organization to which you want the user to have access. If the user is a member of a child organization, you can give him/her access to the parent organization. By default, the user has access to the organization he or she is the member of. If you change the organization membership, the user then has access only to the assigned organization.
- **Reviewer Status** – Select the status that defines the review permission for the user.

External IDs

Assign an external identifier for a user to associate external data to users efficiently. On the **External IDs** tab, you can find the following columns:

- **External Data Source** – View the list of the external data sources defined for your workgroup.
- **External Data Source ID** – Type any text that helps you identify the external source better. The external source ID should be unique for all users.

Click **OK** to add a new user. The user is added to the workgroup and a message with the login information is sent to this user's email.

You can change the information of any user in the workgroup by using the **Edit User** dialog box that opens when you click the user's name in the grid.

Manage users

Navigation

Administration tab > **Users** tab > **Users** page.

View user's login history

Procedure

1 On the **Users** page, select the user whose login history you want to view.
2 On the **Actions** menu, click the **View User's History** option.
3 In the **Login History** dialog box, navigate through the pages by clicking the navigation arrows.
4 Click **Close**.

Assign users to organization

Procedure

1 On the **Users** page, select the users to whom you want to assign an organization.
2 On the **Actions** menu, click **Assign Membership**.
3 In the **Assign Membership** dialog box, select the organization from the organization tree.
4 Click **Assign**.

Reassign all user's cases to another user

Procedure

1 On the **Users** page, select the user whose cases you want to reassign.
2 On the **Actions** menu, click **Reassign All Cases**. opens.
3 In the **Bulk Assign Cases to New Owner** dialog box, select the user to whom you want to assign the cases.
4 Click **OK**.

Import users from a file

Navigation

Administration tab > **Users** tab > **Users** page.

Multiple users can now be assigned the same role as they are imported into EFM.

You can also import users with their organization information. The organization name in the imported document should be exactly the same as the organization name in the application.

Additionally, you can import the following user fields: Employee External Data Source, Employee External ID, Organization External Data Source, and Organization External ID. These fields are optional. If you want to import employee fields, you need to specify both employee user fields (Employee External Data Source and Employee External ID). Similarly, if you want to import organization fields, you need to specify both organization user fields (Organization External Data Source and Organization External ID).

If the **Employee External Data Source** field is valid, and the **Employee External ID** field is unique for the data source, the employee is added with the specific external ID on the data source. If you do not specify the **Employee External Data Source** field and the **Employee External ID** field, the employee is added without External ID.

If the **Organization External Data Source** and the **Organization External ID** fields are valid, the employee is added with the assignment to the specific organization. If you do not specify the **Organization External Data Source** and the **Organization External ID** fields, the employee is added to the root organization.

Procedure

1. Go to the **Administration** tab > **Users** tab.
2. On the **Actions** menu, click **Import**.
3. In the **Import Users** dialog box, click **Select** to locate the file to import on your system.

   File type must be .csv, .tsv, .xlsx, .txt, or .zip. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats.
4. Click **Next**.
5. In the **Map Fields** dialog box, map the fields from the import file to the **User Fields**.

> Certain fields will map automatically such as User Name, Display Name, Email, Culture, Organization, Employee External Data Source, and Employee External ID.

6. Click **Next**.
7. In the list with the user roles, select the role that will be assigned to all of these users.
8. Click **Next**. The **Ready To Import Users** message shows.
9. Click **Import**. The **Task Completed** message shows.
10. Click **Close**.

Export users

Navigation

Administration tab > **Users** tab > **Users** page.

The system and group administrators can export the workgroup users data to the .csv, .tsv, or Microsoft Excel format.

The exported file contains the following data about all users registered under the current workgroup, regardless of the selected user or page:

- User Name
- Display Name
- Email
- Organization Membership
- Organization Access
- Role
- Culture

Procedure

1. Go to the **Administration** > **Users** tab.
2. On the **Actions** menu, click **Export**, and then select the output format.
3. In the **Export Users** dialog box, click the link that appears to save or open the export file.
4. Click **Close**.

Notify users

Navigation

Administration tab > **Users** tab > **Users** page.

You can view the list of all user accounts in the current workgroup and send emails to the needed users.

Procedure

1. Go to the **Administration** > **Users** tab.
2. Select the check box next to the user to whom you want to send an email, and then on the **Actions** menu, click **Notify Selected Users**.
3. Complete the following fields to compose your message:
   - **From** – An email address of the email sender. By default, it is your user account.
   - **Reply To** – An email address the recipients reply to if they select to answer the email. By default, it is your user account.
   - **To** – Select the check boxes next to the people names you want to send your email to.
   - **Subject** – Add the subject line to your email.
   - **Email Body** – Add content to the body of your message and customize it by using the editing toolbar. You can change the format of your message text, add images, input HTML, check spelling, print your email, and so on.
4. Click the **Send** button.

Organizations

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button.

On the **Organizations** page, you can add, delete, disable, and edit organizations in your workgroup. In the left corner of the **Organizations** page, you can view the list of organization titles that belong to your workgroup.

Click the organization name in the grid to edit the organization title and the **External Data Source ID** information.

You can disable an organization without users or child organizations if you do not need to use it for data collection any longer but want to include it in reporting. Disabled organizations appear dimmed in the grid.

You can add child organizations to the existing organizations. Click the organization title in the tree and the list of child organizations appears in the **Organizations** grid.

By default, your organizations are sorted by the **Title** column in the **Organizations** grid. If you want to change how your organizations display in the grid, click a column header (**Title** or **Organization**). An arrow appears up (ascending) or down (descending) to show the sort order. You can also change a column width by dragging the edge of the column header.

The default number of organizations per page is 10; however, you can select up to 100 organizations to display on the **Organizations** page. You can also navigate between the pages of organizations by clicking the navigation arrows at the bottom of the page.

To manage all organizations, select the check box in the upper-left corner of the **Organizations** page.

The following columns are available on the **Organizations** page:

- **Title** – Name of a child organization. Click the child organization name to edit the child organization.
- **Organization** – Name of the organization to which the child organization belongs.
- **External Data Source ID** – Unique identifier of an organization.

Add an organization

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > **New** button.

You can add organizations and child organizations to arrange a hierarchy of users and organizations in your workgroup. You can also export your organization hierarchy into a file to easily modify it, and then import your updates back to EFM. For more details, see Export organizations, page 1360.

The name of each new organization and of all child organizations should be unique.

Procedure

1. On the **Users** page, click the **Organizations** button.
2. On the **Organizations** page, click the workgroup name.
3. On the toolbar of the **Organizations** grid, click the **New** button.
4. In the **Add Organization** dialog box, in the **Title** text box, enter the name of the organization.
5. Click **Add**.

Add a child organization

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > **New** button.

You can add new organizations to the Organizations grid to arrange a hierarchy of organizations in your workgroup.

Procedure

1. On the **Users**page, click the **Organizations** button.
2. In the **Organizations** grid, from the list of workgroup organizations, select the organization name to which you want to add a new child organization.

> You can find the organization name by using the search box at the top of the list. To search for the specific organization name, type a partial or whole organization name in the search box. The list of organization names that match your input displays.

3. On the toolbar of the **Organizations** grid, click the **New** button.
4. In the **Add Organization** dialog box, in the **Title** text box, enter the name of the organization.
5. Click **Add**.

Export organizations

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > **Actions** menu > **Export** option.

You can maintain your organizations' hierarchy by exporting it to the needed file format (.csv, .tsv, or .xlsx). In the exported file, you can modify the organizations' hierarchy, and then upload your updates back to the EFM application.

The exported file contains the following columns:

- **Workgroup** – Workgroup of the exported organization hierarchy. Ensure that workgroups match before importing a file.
- **Organization Name** – Title of the organization. This column is empty for top-level organizations in the hierarchy.
- **Parent Organization Name** – Title of the parent organization.
- **External Data Sources** – IDs of external data sources separated by semicolons.

The file for import should contain the same columns.

Procedure

1. In the **Organizations** grid, in the **Actions** menu, click **Export**, and then select the needed file format.
2. In the **Export Organizations** dialog box, download your file, and then close the dialog box.
3. Modify the organizations' hierarchy as needed.

Import organizations

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > **Actions** menu > **Import**option.

You can import organizations in the following formats: .csv, .tsv, or .xlsx

Procedure

1. In the **Organizations** grid, in the **Actions** menu, click **Import**.
2. In the **Import Organizations** dialog box, choose one of the following options:
   - **Update current organization structure** – The existing organizations will be updated, and new ones will be added from the file (if any). No organizations will be disabled in EFM.
   - **Import new organization structure** – Besides updating the existing organizations and adding the new ones, the organizations from the previous structure will be disabled according to the updates in the imported file.

> The organizations containing child organizations or users will not be disabled, and the import task will be completed with errors.

3. Click **Select** and locate the needed file on your computer. You can import .csv, .tsv, or .xlsx files.

> You can also download a file template by clicking the **Download Template** link.

   a. Click **Next**.
   b. In the **Import Organizations** dialog box, map the columns from the imported file to the corresponding data fields by using the drop-down lists, and then click **Next**. Certain fields are mapped automatically.
   c. Click **Import**, and then click **Close**.

> If the file structure is broken, the import process fails. Reasons of the broken structure can be the following: organizations with non-existing organization set as a parent, some columns are missing or extra columns are present in a file, non-existing External Data Sources are used, and so on.

Disable organizations

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > select an organization > **Actions** menu > **Disable Organizations** option.

You can disable organizations that you do not need to collect information from any longer. The disabled organizations remain available for reporting.

Once you disable an organization, it is impossible to enable it again. You cannot perform the following actions on the disabled organizations:

- Assign users and child organizations
- Use as default
- Edit
- Share reports or surveys with

It is possible to disable only the organizations that do not include any child organizations or users. If you want to disable an organization that contains users or child organizations, you need to reassign all users it contains and delete all child organizations in it.

You can also disable child organizations.

Procedure

1. In the **Organizations** grid, select the check box next to the organization that you want to disable.
2. On the **Actions** menu, click the **Disable Organizations** option.
3. In the confirmation dialog box, click **Disable Organizations**.

   The organization is disabled and appears dimmed in the grid.

Delete organizations

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > select an organization > **Actions** menu > **Delete** option.

You can delete the organizations and child organizations that you do not need to use anymore. When an organization is deleted, it is no longer available in the application. Any data associated with the shared surveys or shared reports scoped to the deleted organization is removed from the application as well.

If an organization has survey results or cases associated to it, they are reassigned to the parent organization. You can disable an organization instead of deleting it to leave it available for reporting of the existing survey results. For more information, see the Disable organizations, page 1362. You can also delete the disabled organizations that you do not need to use for reporting any longer.

It is possible to delete only the organizations that do not include any child organizations or users. If you want to delete an organization that contains users or child organizations, you need to reassign all users that it contains and delete all child organizations in it.

It is possible to delete multiple organizations at a time.

Procedure

1. In the **Organizations** grid, select the organization that you want to delete.
2. On the **Actions** menu, click **Delete**.
3. In the confirmation dialog box , click **OK**.

Assign External Data Source ID to organization

Navigation

Administration tab > **Users** tab > **Users** page > **Organizations** button > click the needed organization > **Edit Organization** dialog box.

You can assign External Data Source ID to an organization to associate external data with that organization efficiently.

> Organizations imported from the WFO source have their External Data Source IDs already assigned. You cannot edit the External Data Source IDs of the organizations imported from the WFO source.

Procedure

1. In the **Edit Organization** dialog box, in the **External Data Source** column, find the data source that you want to assign to the organization.
2. In the **External Data Source ID** text box, next to the needed data source, type the unique name for the data source that identifies the external data in the particular organization.
3. Click **Save**.

For information about adding external data source, see External Data Sources, page 1437.

Assign External Data Source ID to a user

Navigation

Administration tab > **Users** tab > **Users** page > click the needed user > **Edit User** dialog box > **External IDs** tab.

You can assign External Data Source ID to a user to associate external data with that user efficiently.

> Users imported from the WFO source have their External Data Source IDs already assigned. You cannot edit the External Data Source IDs of the users imported from the WFO source.

Procedure

1. On the **External IDs** tab, in the **External Data Source** column, find the data source that you want to assign to the user.
2. In the **External Data Source ID** column, next to the needed data source, type the unique name for the data source that identifies the external data.
3. Click **Save**.

For more information about adding external data source, see External Data Sources, page 1437.

Organization scoped surveys

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Design** tab > **Content** tab > **Add** menu or **Add a Question** section > click **Add from Library**.

You can add the **Organization External ID** or **Employee External ID** question to your survey to associate survey results with employees or organizations. The collected data can be used for statistics and reports. Only one of these questions can be added to the survey. The questions are added as hidden.

> You can only add the **Organization External ID** and Employee External ID questions to a survey in **Design** mode before it is published or reopened.

The **Organization External ID** question includes the following topics:

- External Data Source
- Organization External ID
- Organization Display Name (always hidden)

The **Employee External ID** question includes the following topics:

- External Data Source
- Employee External ID
- Employee Display Name (always hidden)
- Organization Display Name (always hidden)
- Employee Username (always hidden)
- Employee Email Address (always hidden)

You can ensure that your scoped survey is not distributed in a non-scoped way in data sets. When a survey is scoped and you want it to remain scoped, clear the **Allow survey to be linked into data sets** check box. The **Allow survey to be linked into data sets** check box is available only for the Organization External ID and Employee External ID library questions on the Question Options panel in the survey designer. For more information, see Organization scoped data sets, page 1198.

Collecting Survey Responses

You can collect responses to the **External ID** questions via any means available for the **Fill in the Blank** question (pre-load data, API calls, user input, piping from another question, etc.). The submitted data is compared to the Organization or Employee External ID for the specified external data source. If a match is found, the Organization or Employee is associated to the survey. If a match is not found, the default organization is used. You can define the default organization under **Question Options**.

> The comparison of IDs is case-insensitive.

If your survey includes the **Organization External ID** question, the following fields are available on the **Responses** side tab and for any report element supporting the **Fill in the Blank** question:

- Organization External ID
- External Data Source

- Organization Display Name

If your survey includes the Employee External ID question, the following fields are available on the **Responses** tab and for any report element supporting the **Fill in the Blank** question:

- Employee External ID
- External Data Source
- Employee Display Name
- Employee Username
- Employee Email Address

So you can add report elements based on these **External ID** fields. The report data will include only the responses associated with a specific organization. This ensures secure access to response data limited to authorized users only. If a report author is not associated to the root organization, the public report and public widget features are unavailable.

Organization performance analysis report

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports**page > **New** menu > click **Organization Performance Analysis Report**.

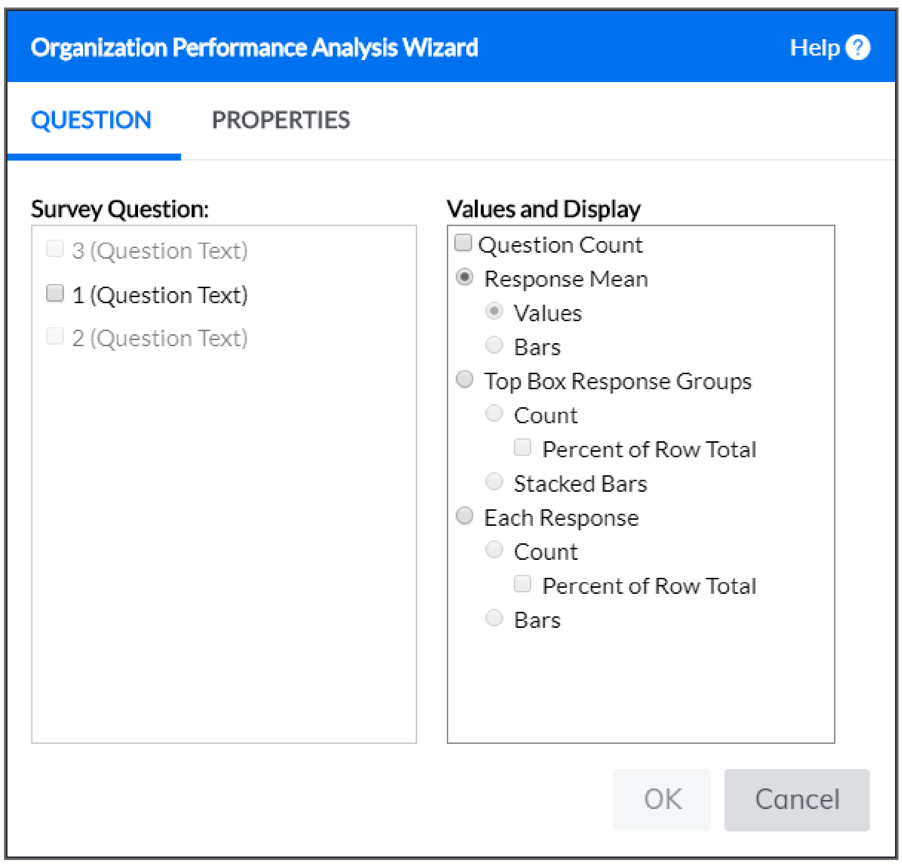
OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **New** menu > click **Organization Performance Analysis Report**.

You can create an **Organization Performance Analysis** report to associate the survey results with definite organizations or users. The report is created based on the user's current organization.

For that purpose your survey should include the External ID System Question, which can be shown or hidden for the users. If the question is hidden, the responses are automatically assigned to the user's current organization. For more information on the External ID System Questions, see Organization scoped surveys, page 1366.

When you create a new **Organization Performance Analysis** report, you can use the **Question** and **Properties** tabs.



The Organization Performance Analysis Wizard dialog box

Question

On the **Question** tab, you can select the question you want to analyze in your **Organization Performance Analysis** report.

- **Survey Question** – Select the question responses to which you want to analyze in your report. It is possible to analyze only one question at a time.

> For the **Choose Many** questions, only the **Each Response** option is available.

- **Values and Display** – Select the data format that you want to use in your report.
- **Question Count** – Select this check box to view the total number of responses for the selected question in your report.
- **Response Mean** – This option shows the sum of values divided by the number of values (average value).
  - **Values** – This option shows the percentage of the response choices selected by respondents.
  - **Bars** – This option shows the bar with the percentage of the response choices selected by respondents.
- **Top Box Response Groups** – This option shows either percentage or number of the response choice groups selected by respondents. You can specify the number of choices to be used for defining the top and the bottom groups on the Properties tab.
  - **Count** – This option shows the number of the response choice groups selected by respondents.
    - **Percent of Row Total** – This option shows the percentage in addition to the number of the response choice groups selected by respondents.
  - **Stacked Bars** – This option shows the bar with the percentage of the response choice groups selected by respondents.
- **Each Response** – This option shows either percentage or number of each response choice selected by respondents.
  - **Count** – This option shows the number of responses for each response choice.
    - **Percent of Row Total** – This option shows the percentage in addition to the number of responses for each response choice.
  - **Bars** – This option shows the bar with the count of responses for each response choice.

Properties

The **Properties** tab contains the **Labels** and **Data** sections, both providing a number of customization options.

In the **Labels** section, the following options are avaliable:

- **Question Labels** – Select the question label for your report. The available options are **Question Heading** and **Report Heading**.
- **Caption** – Enter your text in this text box to show a brief description below your report.
- **Base Total (label)** – Use this text box to edit the label for total amount of response choices selected by respondents. Base is a default label. If you do not provide any value, the default value is applied to the report.

In the **Data** section, the following options are avaliable:

- **Displayed Values** – Select the response data appearance in your report. The following opations are available:
  - **Numbers and Percentages** – This option shows both percentage and the number of the response choices selected by respondents. The response choices number appears above the percentage.
  - **Percentages only** – This option shows only the percentage of the response choices selected by respondents.
  - **Numbers only** – This option shows only the number of the response choices selected by respondents.
- **Decimal Places** – Define the decimal places for the values in the report. The available options are 0, 1, 2, and 3.
  - **Reverse Order** – Select this check box to view the values and means in an opposite order.
- **Range of Top Group** – Use this text box to specify the number of choices to be used for defining the top group. For example, if the top group range is set to 2, all responses of 9 and 10 on a 0-10 scale are included in the top group.
- **Range of Bottom Group** – Use this text box to specify the number of choices to be used for defining the bottom group. For example, if the bottom group range is set to 7, all responses of 0, 1, 2, 3, 4, 5, 6, and 7 on a 0-10 scale are included in the bottom group.

To apply changes that you made to the report properties, click **OK**.

Viewing the Organization Performance Analysis Report

Your **Organization Performance Analysis** report consists of the three main sections:

- **Organization** – The name of the main organization that you are assigned to.
- **Organizations in** [the name of the main organization] – The name of the child organizations that belong to the main organization.
- **Employees in** [the name of the main organization] – The users that belong to both main and child organizations.

Your **Organization Performance Analysis** report might contain responses gathered from users that belong to different child organizations. You can view the results received from each organization by clicking the child organization's name in the second section of the report.

> The public report generation does not currently support the Cross-tab Analysis report types. The Cross-tab Analysis report types are now disabled for the public reports.

It is also possible to filter your report by organizations.

> You can create an Organization Performance Analysis report by using the survey that contains the External ID System Question.

Add organization performance analysis report

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Design** tab > **Analyze** tab > **Reports**page > **New** menu > click **Organization Performance Analysis Report**.

OR

Report & Analyze tab > **Project Reports** tab > **Reports** page > **New** menu > click **Organization Performance Analysis Report**.

You can add an **Organization Performance Analysis** report to associate the survey results with definite organizations or users. The report is created based on the user's current organization.

Procedure

1. Open the **Reports** page.
2. On the **New** menu, click **Organization Performance Analysis Report**.
3. In the **Name Your Report** dialog box, in the **Report Name** text box, enter the name of a report .
4. Click **OK**.
5. In the **Organization Performance Analysis Wizard** dialog box, on the **Question** and **Properties** tabs, select the properties for your report.
6. Click **OK**.

Filter responses by organizations

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or open an existing one > **Analyze** tab > **Responses** tab > **Actions** menu > click **Filter**.

You can filter responses by the organizations with which they are associated.

Procedure

1. On the **Responses** tab, on the **Actions** menu, select the **Filter** option.
2. In the **Filter** dialog box, click the **Add** button.
3. In the **Add Filter Criteria** dialog box, in the **Source** menu, select the **Participant Information** option.
4. In the **Field** menu, select the **Organization** option.
5. Use the **Expression** and **Value** menus to specify the organization you want to use for or exclude from filtering.
6. To save the filter criteria, click the **Add** button.

   The created filter displays in the **Filter** dialog box.
7. To filter responses according to the created criteria, click the **Apply Filter** button.

Groups

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button.

Use the **Groups** view to manage the groups assigned to your workgroup.

> The **Groups** view is available only if the system administrator configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features**.

Use the following options to manage groups:

- **Actions** – Select whether you want to add or remove a group from the workgroup.

  The following options are available:

  - **Add Group** – Add a new group to the workgroup.
  - **Delete** – Delete the selected group from the workgroup.
  - **Import** – Import groups from a .csv file.
  - **Export** – Export selected groups to the .csv file format. For more details, see Export and import the user group assignments, page 1377.
- **Add Group** – Add a new group to the workgroup.
- **Users/Organizations/Groups** – Toggle between the **Users**, **Organizations**, and **Groups** views.
- **Search** – Enter the name of the group in the text box and click the **Search** button.

By default, the **Groups** view shows the first 10 groups on the page. To view more items per page, use the **View per Page** option at the bottom of the **Groups** view. Click 25, 50, or 100 to display more groups.

You can sort survey participants in the view by clicking the column heading. To change the width of a column, drag its edge.

Assign users to group

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button > **Groups** column > click the count link > **Assigned Groups** dialog box.

You can manage the list of groups assigned to the user by using the **Assigned Groups** dialog box.

> Only users with Feedback Intelligence enabled roles can be assigned to the group.

Before you begin

- Verify that the system administrator configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features** to activate the **Groups** view.

Procedure

1. Go to the **Administration** tab > **Users** tab.
2. On the **Users** page, in the **Groups** column, click the group's link.
3. In the **Assigned Groups** dialog box, select the check box next to the group that you want to add.
4. In the **Actions** menu, click **Add Group**.
5. In the **Assign Groups** dialog box, select the check box next to the group that you want to assign to the user, and then click **Add Group**.
6. In the **Assigned Groups** dialog box, click **Close**.

   The group is assigned to the specified user.

> To delete the assigned group, select the group in the **Assigned Groups** dialog box, and then on the **Actions** menu, click **Remove Group**.

Add group

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button > **New** button.

You can add a new group and assign users to this group.

Before you begin

- Verify that the system administrator has configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features** to activate the **Groups** view.

Procedure

1. Go to the **Administration** tab > **Users** tab.
2. On the **Users** page, click the **Groups** button.
3. On the toolbar, click **New**.
4. In the **Add Group** dialog box, click **Group**, and then enter the name and description of the group in the corresponding text boxes.
5. On the **Surveys** tab, in the **Actions** menu, click **Add**.
6. In the **Add Surveys to**dialog box, select the surveys to add to the group, and then click **Add**.

> Select the **All Surveys** check box to map the group to all existing and future surveys submitted to Feedback Intelligence.

7. On the **Users** tab, in the **Actions** menu, click **Add**.
8. In the **Add Users to** dialog box, select the surveys to add to the group, and then click **Add**.

> Only users with Feedback Intelligence enabled roles can be assigned to the group.

9. Click **Close**.

Edit group

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button > click a group name > **Edit Group** dialog box.

You can edit the group with the assigned users.

Before you begin

- Verify that the system administrator has configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features** to activate the **Groups** view.

Procedure

1. Go to the **Administration** tab > **Users** tab.
2. On the **Users** page, click the **Groups** button.
3. In the **Groups** view, click the group's name.
4. In the **Edit Group** dialog box, click the **Group** tab, and then edit the description of the group in the **Description** text box. The name of the group is not editable.
5. On the **Surveys** tab, in the **Actions** menu, click **Add**.
6. In the **Add Surveys to** dialog box, select the surveys to add to the group, and then click **Add**.

> Select the **All Surveys** check box to map the group to all existing and future surveys submitted to Feedback Intelligence.

7. To delete the assigned survey, select the survey in the **Surveys** grid.
8. In the **Actions** menu, click **Delete**, and then click **OK**.

> Only users with Feedback Intelligence enabled roles can be assigned to the group.

9. To delete the assigned user, select the user in the **Users** grid.
10. In the **Actions** menu, click **Delete**.
11. Click **Close**.

Export and import the user group assignments

Navigation

Administration tab > **Users** tab > **Users** page > **Groups** button > **Actions** menu.

You can maintain your user to group assignments in a workgroup by exporting them to the .csv file format. In the exported file, you can modify the assignments, and then upload your updates back to the EFM application.

The exported file contains two columns: **User Name** and **FI Group Name**.

> The file for import should contain the same columns.

Before you begin

- Verify that the system administrator has configured Feedback Intelligence under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features** to activate the **Groups** view.

Procedure

1 Export assignments:

   a. In the **Groups** grid, on the **Actions** menu, click **Export**, and then select the .csv file format.

   b. In the **Export User-Group Assignments** dialog box, download your file, and then close the dialog box.

Modify the exported assignment as needed.

> The imported user-group mappings replace all the existing mappings. Any user-group mappings not contained in the imported file are removed.

2 Import assignments back to EFM:

   a. In the **Groups** grid, on the **Actions** menu, click **Import**.

   b. In the **Import User-Group Assignments** dialog box, click **Select** and choose the needed file.

   c. Click **Next**.

   d. Click **Import**.

> If the file is not valid, contains user name or group name that is incorrect, does not have an FI account, or does not exist in a workgroup, then the import process is canceled.

   e. Click **Close**.

Roles

Navigation

Administration tab > **Roles** tab.

You can create, edit, copy, and delete user roles and corresponding permissions within the application and set the selected role as a default role for all new users.

Having a custom role, you can set the selected role as default one only for users with the same or less permissions than your custom role has.

EFM is a role defined application. By using either standard or custom roles, administrators can control the use of each aspect of the application.

The **Roles** page shows a number of columns, including:

- **Name** – The name of the role.
- **Description** – The role's short description.
- **Default** – The default role, which is marked by the check mark .

On the toolbar, you can find the following functionality:

- **Duplicate** – Duplicate the selected role.
- **Delete** – Remove the selected role.
- **Default Role** – Make the selected role as default role for all new users. If you do not assign any role to the users, the default role is assigned to them automatically with the permissions that accompany that role.
- **Create Role** – Create a new role.

You can click any selected role to change it, except the locked roles.

By default, the **Roles** page shows the first 10 roles. To view more items per page, use the **View per Page** option at the bottom of the **Roles** page. Select the **25**, **50**, or **100** link to display more roles. In addition, if the **Roles** page is longer than one page, you can navigate between the pages by clicking the navigation arrows.

Predefined roles

Navigation

Administration tab > **Roles** tab.

The EFM application contains a number of predefined roles, each including a defined set of permissions.

The predefined roles are marked as the locked roles. Administrator assigns a role to each user within the workgroup.

The following predefined roles are available:

- **Default** – Default unassigned role.
- **Case Administrator** – Users can create, view, and configure cases regardless of their assignment.
- **Case User** – Users can create and edit cases that are assigned to them only. Also, users can view any cases in their organization; users that are not assigned to any organization can view all cases in the workgroup.
- **Group Administrator** – Administrator of a workgroup.
- **Lite Survey Author** – Survey author that does not have access to advanced features.
- **Report Author** – Users can create and edit reports.
- **Report Viewer** – Users can view saved reports they have been granted access to.
- **Restricted Survey Author** – Users can create surveys and have limited reporting access.
- **Survey Administrator** – Survey author that has access to some administration functions.
- **Survey Author** – Users can create and design surveys.
- **Translator** – Users can translate surveys, invitations, and responses.
- **Web Administrator** – Users can design and generate code for Web Intercepts.

> To view the permissions assigned to a role, select the check box next to the role name, and then click the **Edit** button on the toolbar.

Create a new role

Navigation

Administration tab > **Roles** tab > **New** button.

To create a new role, click the **New** button on the toolbar.
The **Create Role** page opens.

On the **Create Role** page, complete the following text boxes:

- **Name** – Enter the title of a new role.
- **Description** – Enter a short description of a new role.

The **Create Role** page provides a set of permissions, which determine the actions the user can perform within the product, including:

- **View** – The user can see the specified item.
- **Create** – The user can add a new item.
- **Edit** – The user can modify the item.
- **Delete** – The user can remove the item.
- **Translate** – The user can perform a translation of the item.
- **Import** – The user can import data into the item.
- **Export** – The user can save the specified item to use it outside the product.

Some actions cannot be performed on certain features. These items do not have a check box.

The permissions are divided into ten categories, each including a number of items. You can assign permissions to the role by selecting the corresponding check boxes. The categories are divided as follows:

- **Survey Administration** – Permissions to work with the **Surveys** tab.
  - Questionnaire
  - Campaigns

By default, the **Campaigns** permissions are enabled for the Group Administrator, Survey Administrator, Survey Author, Lite Survey Author, and Restricted Survey Author roles. For other default and custom roles, the permissions are cleared, and the **Campaigns** feature is unavailable. To enable the **Campaigns** permissions, contact your Group Administrator.

  - Participants
  - Invitations
  - Tasks
  - Responses
  - Reports
  - Data Sets
- **Reporting** - Permissions that allow building reports.
  - Reports
- **Unified VoC Configuration** – Permissions to work with the Unified VoC Module.

> The Unified VoC Configuration permissions are available only if the System Administrator activates the **Unified VoC** license for your workgroup.

- Unified Data Set – Select the needed check boxes to view, add, import, export, and edit the Unified Data Sets.
- Unified Data Source – Select the needed check boxes to view, add, and edit the projects and map their data types to the configured unified data mode to add them to the VoC main features.
- Unified Data Model – Select the needed check boxes to view, create, edit, and delete the needed data types in a schema that can be mapped the unified data source.
- Global Triggers – Select the needed check boxes to create, edit, and delete triggers.

- **Data Connectors** – Permissions to work with the **Data Sources** tab.
  - File Imports

> By default, all permissions (**View**, **Edit**, and **Delete**) are selected only for the Group Administrator and Survey Administrator roles.

  - OpinionLab Comments
  - Speech Analytics
  - ForeSee

> The **OpinionLab Comments**, **Speech Analytics**, and **ForeSee** categories are available only if the System Administrator activated the OpinionLab license, Speech Analytics license, and ForeSee Integration license for the workgroup correspondingly.

- **Poll Administration** – Permissions to work with the **Polls** tab.
  - Polls
- **Web Intercept Administration** – Permissions to work with the **Web Intercepts** tab.
  - Web Intercepts
- **Panel Administration** – These items relate to the **Panel** tab.
  - Panelists
  - Profiles
  - Filters
- **Group Administration** – Permissions to work with the administration of the workgroup.
  - Library Items
  - Survey Themes
  - Users and Organizations
  - Roles
  - Email
  - Unsubscribe List
  - Devices
  - External IDs

> The following categories do not have the standard set of actions (for example, **View**, **Create**, or **Edit**) listed. Items are enabled by selecting the appropriate check boxes.

- **Case Administration** – Permissions to work with the **Cases** tab.
  - Cases
  - Organization Cases
  - Customer Email Address
- Anomaly Detection – Permissions to control users who have access to Anomaly Detection features.
  - Access Anomaly Detection – Allows accessing and viewing the Anomaly Detection projects and provides access to the Anomaly Detection page under Report & Analyze.
  - Add to Anomaly Detection – Allows adding new projects to Anomaly Detection and provides access to the Anomaly Detection page under View Responses.
  - Reassign Cases – Allows reassigning cases to other users in the workgroup. By default, it is enabled for Group Administrator, Case Administrator, Case User, Survey Administrator, and Survey Author.
- **Administration** – Permissions to configure different features.
  - Configure Group Settings
  - View All Surveys
  - View All Tasks
  - View All Intercepts
  - Configure Portal Settings
  - Manage Panelist Status
  - Configure Workgroup Options
  - View Transaction Events
  - Configure Case Settings
  - View All Cases
  - View All Data Sets
  - Workgroup Reports Activity
  - View FI Security
  - Track As Admin
  - Data Retention Notifications – Allows receiving scheduled notifications about surveys and responses. By default, the permission is enabled for Group and Survey Administrators.
  - Manage Data Policies – Displays the Data Policies page under the Configuration tab and allows specifying settings for data retention and deletion. By default, the permission is enabled for Group and Survey Administrators.
- **Images and Media** – Permissions to work with images and media.
  - Upload Group Media
  - Delete Group Media
  - Allow User Media
- **Users** – Permissions to work with the users.

- Notify Group Users
- Audit Users
- **Surveys** – Permissions to work with the **Surveys** tab.
  - Open Surveys
  - Close Surveys
  - Edit Survey HTML
  - Send Invitations
  - Share Surveys
  - View Campaign Reports
  - Permanently Delete Surveys
  - Define Weighting Schemes
  - Send to Offline Device
  - SMS Surveys
- **Campaign Creation** - Permissions to work with campaigns.
  - Survey Link
  - Contact List
  - Panelist
  - Social Media
  - Offline Device
  - Passcode
  - QR Code

By default, the **Campaign Creation** permissions are enabled for the Group Administrator, Survey Administrator, Survey Author, Lite Survey Author, and Restricted Survey Author roles. Group Administrator and Survey Administrator can select and clear certain permissions for the duplicated default and custom roles. Depending on this, a user can either view, add, or edit the selected campaigns.

- **Profiles** - Permissions to work with the **Profiles** tab.
  - Open Profiles
  - Close Profiles
- **Experience** - Permissions to work with different features.
  - Advanced Branching
  - Email Triggers
  - Free Form Word Processor
  - Scoring
  - Custom Properties
  - Page Rotation
  - Public Report
  - View Dashboards
  - Share Dashboards

- Public Dashboard

> If the **View Dashboards** check box is cleared, the **Share Dashboards** and **Public Dashboard** check boxes are cleared automatically.
>
> If the **Share Dashboards** check box is selected, the **View Dashboards** check box is selected automatically.
>
> If the **Public Dashboard** check box is selected, the **View Dashboards** check box is selected automatically.

- Add Text Analytics Elements
- Access Feedback Intelligence – Allows requesting the project to be pushed to FI.
- Add to Feedback Intelligence – Allows pushing new projects to FI.

> If you have the Access Feedback Intelligence permission, but do not have the Add to Feedback Intelligence permission, you can update the existing FI projects, but cannot push a new project to FI.

- Edit Code Blocks
- Export to Tableau WDC
- Mobile Comment Stream - Allows access to the comment stream feature on the Experience Mobile application.

> By default, the **Mobile Comment Stream** permission is enabled for the Group Administrator, Survey Administrator and Report Viewer.

To apply settings to a new role, click the **Save** button.

Manage user roles

Navigation

Administration tab > **Roles** tab > **Roles** page.

You can create, delete, duplicate, and edit user roles.

The **Create Role** page provides a set of permissions, which determine the actions a user can perform within the product, including:

- **View** – The user can see the specified item.
- **Create** – The user can add a new item.
- **Edit** – The user can modify the item.
- **Delete** – The user can remove the item.
- **Translate** – The user can perform a translation of the item.
- **Import** – The user can import data into the item.
- **Export** – The user can save the specified item to use it outside the product.

Some actions cannot be performed on certain features. These items do not have a check box.

Duplicate a role

Procedure

1. On the **Roles** page, select the role that you want to copy.
2. On the toolbar, click the **Duplicate** button.

   The name of the duplicate is the original role name followed by the next incremental number, for example, "Group Administrator (2)."

Delete a role

Procedure

1. On the **Roles** page, select the role that you want to delete.
2. On the toolbar, click **Delete**.
3. In the confirmation dialog box, click **Delete**.

Edit a role

Procedure

1. On the **Roles** page, click the name of the role that you want to edit.
2. On the **Edit Role** page, make your changes.
3. Click **Save**.

Default role

Procedure

1. On the **Roles** page, select the role that you want to make a default one.
2. On the toolbar, click the **Default Role** button.
   The selected role is set as a default role for all new users.

> The check mark  appears in the **Default** column next to the default role.

Activate workgroup reports activity for user role

Navigation

Administration tab > **Roles** tab > **Roles** page > **New** button > **Create Role** page > **Administration** section.

You can control the user's ability to access workgroup reports based on the user role set of permissions. You can activate the Workgroup Reports Activity functionality for a user by creating a new role or editing the existing ones from the **Roles** side tab on the **Administration** page. When the **Workgroup Reports Activity** option is not active, you can only access your own reports and reports shared with you by other users. By default, this option is active for group and survey administrators.

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. On the **Roles** page, on the toolbar, click the **New** button.
3. On the **Create Role** page, scroll down to the **Administration** section, and then select the **Workgroup Reports Activity** check box.
4. Click **Save**.

Devices

Navigation

Administration tab > **Devices** tab > **Devices** page.

You must be a **Survey Administrator** to view this functionality.

The **Devices** page is used to register your device for use with the EFM Mobile Offline App. Devices that can be used are the iPhone, iPad, and iPod Touch. To send your survey to devices, you first need to add the Offline Device campaign to the survey (see Adding multiple campaigns to survey, page 586), and then open your survey.

Alerts are provided for text and email notifications. In the **ID** section, blue arrow appears if the device has either email or text messaging available. Selecting the blue arrow will launch either a new email message or a new text message to allow users to send the device's ID to the EFM system administrator in order to simplify the process of adding a device to the EFM server.

If both email and text messaging are available, the email takes priority over the text message. A standard email or text will appear (with the device information) and the user will add the appropriate contact information (email address or text message phone number).

The **Mobile Offline Survey Taking** feature is available only if you have a license for it.

You can use the **Devices** page to register your device.

You can use the following options on the toolbar to manage devices:

- **Actions** – Activate, deactivate, import, and export your devices.
- **Register Device** – Register a device in the product to establish connection between the device and the application.
- **Delete** – Delete the previously added device.
- **Search** – Search for the device by its ID, description, or tags.

You can find the following information about each registered device in the **Devices** grid:

- **Device ID** – The ID of the registered device.
- **Description** – A brief description of the registered device.
- **Status** – The status of the registered device. The available options are active and inactive.
- **Tags** – The custom user information (for example, a group name). It is limited to 255 characters.

When you delete a device, all surveys and respondent data are deleted from the device.

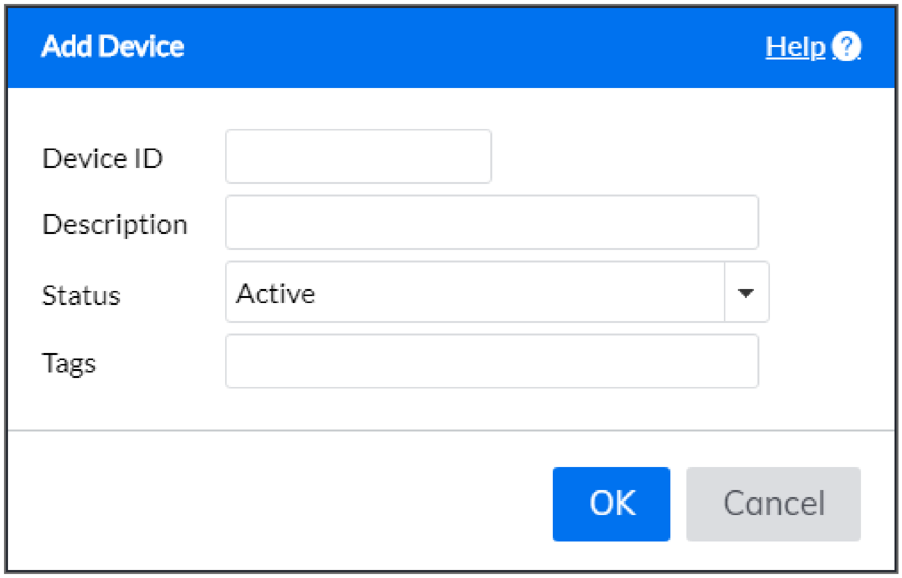
The responses that have already been synchronized with the Web application are not deleted.

Register a Device

Procedure

1. Go to the **Administration** tab > **Devices** tab.
2. On the **Devices** page, click the **Register Device** button.

3 In the **Add Device** dialog box, fill in the requested information.



Add Device dialog box

4 Click **OK**.

5 To send surveys to your iPhone or iPad, navigate to the **Collect** tab, add the Offline Device campaign (see Adding multiple campaigns to survey, page 586), and then use the created widget to add or import devices from another survey (see Manage Offline Access, page 1468).

Remove a Device

Procedure

1 Go to the **Administration** tab > **Devices** tab.

2 On the **Devices** page, select the check box next to the device that you want to remove from the application.

3 Click the **Delete** button.

4 In the warning dialog box, type **DELETE** in all caps.

5 Click the **Delete** button.

Edit the Device Data

Procedure

1 On the **Devices** page, click the device ID.

2 In the **Edit Device** dialog box, edit the device data.

3 Click **OK**.

Self-register a device

Navigation

Administration tab > **Devices** tab > **Devices** page.

Administrators can send the registration emails to the device users so that users can automatically register their devices. Administrators can share the registration URL by using email, text message, or a web page. When users click the registration URL on their device, their device is automatically registered to the appropriate workgroup in an active state. After activation, any available surveys are accessible.

The registration URL is unique for each workgroup. If device is already registered to a workgroup, and users click another registration URL, the device is deactivated from the previous workgroup and activated in a new workgroup.

Procedure

1. Go to the **Administration** tab > **Devices** tab.
2. On the **Devices** page, copy the URL above.
3. Send the URL to the user's device by email or text message or share the URL by using a web page.
4. Notify the URL recipients that they need to click the registration link to register the device. After clicking the link, the device is registered to the appropriate workgroup in an active state.

Tag devices for self-registration

Navigation

Administration tab > **Devices** tab > **Devices** page.

When you register a device by using the URL, you can specify a tag for the device. You can specify the tag in the **Option Tag** text box on the **Devices** page. After specifying the tag, the registration URL is updated to include the specified tag value. The tag value in the URL is encoded and is assigned to the device on registration. When the device is registered, the tag appears on the **Devices** page in the **Tag** column next to the device.

Procedure

1. On the **Devices** page, in the **Option Tag** text box, enter a tag for the device.
2. Copy the updated URL from the text box.
3. Send the URL to the user's device by email or text message or share the URL by using a web page.
4. Notify the URL recipients that they need to click the registration link to register the device. After clicking the link, the device is registered with the tag to the appropriate workgroup.

Activate and deactivate multiple devices

Navigation

Administration tab > **Devices** tab > **Devices** page.

Administrators can activate and deactivate multiple devices to manage them more efficiently. You can make multiple devices active or inactive by clicking the **Activate** or **Deactivate** option correspondingly. You can also activate the inactive devices any time you need.

Deactivate Devices

Procedure

1. Go to the **Administration** tab > **Devices** tab.
2. On the **Devices** page, select the check boxes next to the devices that you want to make inactive.
3. On the **Actions** menu, click **Deactivate**.

   The deactivated devices appear as **Inactive** in the **Status** column.

Activate Devices

Procedure

1. On the **Devices** page, select the check boxes next to the devices that you want to make active.
2. On the **Actions** menu, click **Activate**.

   The activated devices appear as **Active** in the **Status** column.

Import and export devices

Navigation

Administration tab > **Devices** tab > **Devices** page > **Actions** menu.

You can upload multiple devices on the **Devices** page, on the **Actions** menu. Additionally, you can export a list of devices and their basic information into the different file formats to view the devices data outside of the application.

Import Devices

Procedure

1 Go to the **Administration** tab > **Devices** tab.

2 On the **Devices** page, on the **Actions** menu, click **Import**.

3 In the **Import Devices** dialog box, click **Select** to navigate to the file that you want to upload.

> You can import .csv, .tsv, .xlsx, .txt, and .zip file formats. The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats. You need to specify the device ID and description in the file for the device to be uploaded successfully.

4 Select the file, and then click **Open**.

5 Click **Next**.

6 In the **Map Fields** dialog box, match up the fields from the import file with the corresponding fields in the right pane if needed.

7 Click **Next**.

> If the imported file contains the devices which have been already added to the **Administration** > **Devices** page, they will be updated.

8 In the **Ready to Import Devices List** dialog box, click **Import** to begin importing data.

9 In the **Task Completed** dialog box, click **Close**.

Export Devices

Procedure

1 On the **Devices** page, select one or more devices that you want to export.

2 On the **Actions** menu, click **Export**, and then select the output format.

3 In the **Export Devices** dialog box, click **Export**.

4 Your file is generated in the selected format.

5 To open or save the exported file, click the link that appears.

6 Click **Close**.

Feedback Intelligence

Navigation

Administration tab > **Feedback Intelligence** tab.

You can view the contents of the Feedback Intelligence **Folders** table for the current workgroup. You can also view the list of users of your workgroup with the access to Feedback Intelligence.

Before you begin

- The system administrator needs to configure Feedback Intelligence, and then activate the **Feedback Intelligence** tab for your workgroup under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features**.

The users with access to Feedback Intelligence grid

To view the list of users who have access to Feedback Intelligence, click the counter link next to the **Users with Access to Feedback Intelligence**. The **Users with Access to Feedback Intelligence** grid opens with the following columns:

- **User Name** – The name with which the user logs into the product.
- **Display Name** – The name of the user that displays in the application.

> To sort the results based on the selected column, you can click the column header in the table.

The Folders grid

The following columns are available on the **Folders** grid:

- **Folder** – Provides a single folder name located under the **Public Folders** in the associated Business Object system.
- **Description** – Describes the current Business Object environment.
- **Path** – Provides the path to the current Business Object environment.
- **Groups** – Contains a count of groups assigned to the user.

> You can click the column header in the table to sort the results based on the selected column.

To ensure you are viewing the most recent data, click the **Refresh** button above the **Folder** column.

Assign groups to Feedback Intelligence folder

Navigation

Administration tab > **Feedback Intelligence** tab > **Groups** column > click the count link > **Assign Groups** dialog box.

You can assign Business Object groups to reporting folders in your Feedback Intelligence system from the application.

Before you begin

- The system administrator needs to configure Feedback Intelligence, and then activate the **Feedback Intelligence** tab for your workgroup under **Feedback Intelligence** > **Business Objects** > **Enable FI User Security Automation Features**.

Procedure

1. In the **Groups** column, click the count link.
2. In the **Assign Groups** dialog box, click **Add Group** to add a group to the folder.
3. In the **Authorize Group for Folder** dialog box, select the check box next to group that you want to authorize.
4. Specify the access level of the group by clicking the necessary option in the **Access Level** menu, and then click **Add Group**.

   The following options are available:

   - **No Access**
   - **View**
   - **Schedule**
   - **View on Demand**
   - **Full Control**
5. To change the access level of the assigned group, select the check box next to the group, and then click **Change Access Level** in the **Actions** menu.
6. To delete the assigned group, select the check box next to the group, and then click **Delete Group** in the **Actions** menu.
7. Click **Close**.

Unsubscribe List

Navigation

Administration tab > **Unsubscribe List** tab > **Unsubscribe List** page.

On the **Unsubscribe List** page, you can manage all survey participants in your workgroup that select to unsubscribe from your surveys. Each participant that clicks the **Unsubscribe** link in your survey is automatically added to the **Unsubscribe List** page and will not receive any emails with survey invitations or reminders. You can also import and export the unsubscribe list.

The Unsubscribe List functionality applies to panelists and non-panelists.

> Only group and survey administrators can add, import, export, and delete email addresses from the unsubscribe list.

The **Unsubscribe List** page shows the following columns:

- **Email** – Shows email addresses you add to the unsubscribe list.
- **Is Panelist?** – Shows whether the email address in the unsubscribe list belongs to a panelist or non-panelist.

On the toolbar, you can find the following functionality:

- **Add Email Address** – Add email addresses to the unsubscribe list.
- **Import** – Import a list of email addresses that you want to add to the unsubscribe list.
- **Export** – Export the unsubscribe list to the .csv file format to view the unsubscribe list outside the application.
- **Delete** – Remove the email addresses from the unsubscribe list.
- **Search** – Enter the email address you want to find in the text box and click the **Search** button next to the text box.

By default, the **Unsubscribe List** page shows the first 10 email addresses. To view more items per page, use the **View per Page** option at the bottom of the **Unsubscribe List** page. Select the **25**, **50**, or **100** link to display more email addresses. In addition, if the **Unsubscribe List** page is longer than one page, you can navigate between the pages by clicking the navigation arrows.

Unsubscribe Tips

- The unsubscribe list is synchronized with the panel **Is Subscribed** field. All panelists who unsubscribe are added to the workgroup unsubscribe list.
- If a panelist is unsubscribed and becomes subscribed, then the panelist email address is removed from the workgroup unsubscribe list automatically.
- When participants receive the invitation or reminder emails and select to unsubscribe, those participants remain in the participant list and are marked as unsubscribed.
- Participants who previously unsubscribed are distinguished from participants who unsubscribed from your current survey project. The difference is in the status: previously unsubscribed versus unsubscribed.

Add an email address to the unsubscribe list

1. On the **Unsubscribe List** page, click the **Add Email Address** button.
2. In the **Unsubscribe Emails** dialog box, enter the email address of any survey participant you want to exclude from all survey-based email messages in a text box.

> Enter each email address on a new line or separate them with a semicolon.

3. Click the **Unsubscribe** button.

Import the unsubscribe list

1. On the **Unsubscribe List** page, click the **Import** button.
2. In the **Iimport Unsubscribe List** dialog box, click the **Select** button and select the file of the .csv, .tsv, .txt, .xlsx or .zip file format.

> The contents of the .zip file is scanned before extraction to check whether it contains the supported file formats. The file should include the **Email** column with the list of email addressesthat you want to import.

3. Click **Next**.
4. In the **Map Fields** dialog box, match up the fields from the import file with the corresponding fields in the right pane by using the **Unsubscribe Fields** menu.

> Select the **Display fields that are mapped by this wizard** check box to view the fields mapped automatically.

5. Click **Next**.

   The **Ready to Import Unsubscribe List** message shows.
6. Click **Import**.

   The **Task Completed** message shows.
7. Click **Close**.

Export the unsubscribe list

1. On the **Unsubscribe List** page, click the **Export** button.

   The export file is generated in the .csvformat.
2. Click the link that appears to open or save the exported data.
3. Click **Close**.

Remove an email address from the unsubscribe list

1. On the **Unsubscribe List** page, select the check box next to the email address that you want to remove from the **Unsubscribe List**.

2. Click the **Delete** button.
3. In the confirmation dialog box, click **Delete**.

User Logs

Navigation

Administration tab > **User Logs** tab > **Transaction Events** page.

The group and survey administrators can view all transaction events performed in the application, for example, adding a user to a workgroup or login history. The transaction events are displayed for the current workgroup.

You can filter events by using the following options on the **Transaction Events** page:

- **Options** – Select the type of transaction events that you want to view by using the **Action Type** menu. All events are displayed by default.
- **Date** – Define the date range over which you want to track the transaction events by using the start date and end date filters.

You can additionally track and filter the following transaction events:

- Export Organizations
- Import Organizations
- Data Store Triggers

The filtered data appears at the bottom of the **Transaction Events** page. You can view the following information:

- **Action Type** – The transaction events based on your filter.
- **Successes** – The number of the corresponding successful transaction events.
- **Errors** – The number of the corresponding unsuccessful transaction events.

You can use the **Success** and **Errors** columns to export data about the transaction events. For more information about exporting transaction events data, see Export data about transaction events, page 1401.

By default, the **Transaction Events** grid displays the first 10 events. To view more events per page, click **25**, **50**, or **100** to the right of the **View per Page** option.

In addition, if the **Transaction Events** grid is greater than one page in length, you can navigate between the pages by clicking the navigation arrows.

You can click the item in the **Successes** or **Errors** columns to view more details about the transactional event.

The following columns appear in the **Transaction Events** dialog box:

- **Date** – The date of the transaction event.
- **User** – The workgroup member who performed the transaction event.
- **Project** – The survey or file import related to the transaction event.
- **Information** – The additional information about the transaction event, for example, an IP address.

The information in the **Transaction Events** dialog box may vary according to the selected action type.

Filter the transaction events

Procedure

1. Go to the **Administration** > **User Logs** tab.
2. On the **Transaction Events** page, on the **Action Type** menu, select the transaction event type that you want to view, for example, **Login**.
3. In the **Start Date** text box, enter the start date manually or by clicking the icon .
   By default, the current date is selected.
4. To apply the no start date filter, click the **No Start Date** button.
5. In the **End Date** text box, enter the end date manually or by clicking the icon.
   By default, the current date is selected.
6. To apply the no enddate filter, click the **No Start Date** button.

> You can click the icon to open the time picker.

7. Click the **Applying Filter** button.

Activate transaction events for a user role

Procedure

1. Go to the **Administration** tab > **Roles** tab.
2. On the **Roles** page, click the name of the role you that want to edit.
3. On the **Edit Role** page, in the **Administration** section, select the **View Transaction Events** check box.
4. Click **Save**.

Export data about transaction events

Navigation

Administration tab > **User Logs** tab > **Transaction Events** page.

You can export the data about transaction events to the following file formats: CSV, TSV, and Excel.

This functionality is available for users with permission to view transaction events.

Procedure

1. Go to the **Administration** tab > **User Logs** tab.
2. In the **Transaction Events** grid, in the **Success** or **Errors** column (depending on what you want to export), click the needed number.
3. In the **Transaction Events - Login** dialog box, click the **Export** menu, and then click the needed format.
4. In the dialog box, click the link to download and view the exported file.

System Tasks – History view

Navigation

Administration tab > **System Tasks** tab > **Tasks** page.

With the **History** task view, you can send invitations, track the progress of long operations, and track all tasks performed in the application, for example, testing surveys, exporting responses, or importing participants.

On the **Tasks** page, the following columns are available:

- **Event** – Short description of the task.
- **Event Details** – Name of the project to which the task refers.
- **User** – Owner of the project to whom the task refers.
- **Start Date** – Date and time when the task starts.
- **Elapsed Time** – Time during which the task is performed.
- **Status** – Task status, for example, in progress, completed, completed with errors, removed, canceled, or failed.
- **Execution Location** – Location where a task or request was executed, for example, the web application or scheduler.

By default, the **Tasks** grid displays the first 10 tasks. To view more tasks per page, click **25**, **50**, or **100** links. To change the width of a column, drag its edge.

In addition, if the **Tasks** grid is greater than one page in length, you can navigate between the pages by clicking the page navigation arrows

On the toolbar, the following options are available:

- **Cancel** – Stop the task execution.

> The **Cancel** button is only active for the tasks with the **In Progress** status.

- **Filter** – Filter the tasks that are displayed on the **Tasks** page by specific features, for example, by task type, status, or task execution date.

View task details

Procedure

1. On the **Tasks** page, select the task for which you want to view details.
2. In the **Task Details** dialog box, view the current information for the selected task.
   For the **Send Initial Invitation**, **Send First Reminder**, **Send Second Reminder**, **Send Third Reminder**, **Send Fourth Reminder**, and **Send Thank You** task types, you can view the following information:
   - **Campaign** – Campaign name that is associated with the invitation.
   - **Campaign ID** – Campaign ID that is associated with the invitation (only for tasks associated with multiple-campaign surveys).
   - **Email Invitations** – Number of email messages that are associated with the invitation.
   - **SMS Invitation** – Number of SMS messages that are associated with the invitation.

3 Click **Close**.

Cancel a task

Procedure

1. On the **Tasks** page, select the task with the **In progress** status that you want to cancel.
2. On the toolbar, click **Cancel**.

Set a filter

Procedure

1. On the **Tasks** page, click the **Filter** button.
2. In the **Filter Tasks** dialog box, on the **Project** menu, select the project for filtering.

   You can select a survey, profile, file import, or data set.
3. On the **Event Type** menu, select the task type for filtering.

   You can filter by group of events, such as all distribution actions, all import actions, all export actions, or all miscellaneous.
4. On the **Status** menu, select the task status for filtering.
5. In the **Start Date** text box, enter date when the task starts manually or by using the icon. By default, the current date is selected.
6. In the **End Date** text box, enter the end date manually or using the icon. By default, the current date is selected.

> You can click the icon to open the time picker.

7. To apply the filter, click **OK**.
   The notification appears on the **Tasks** page.

System Tasks – Scheduled view

Navigation

Account menu > **My Account** option > **Tasks** tab > **Scheduled** view.

You can track all future tasks that you have scheduled in the application, such as test survey, export responses, import participants, or send invitations with the **Scheduled** task view.

In the **Tasks** grid, the following columns are available:

- **Event** – The event type.
- **Event Details** – The name of the survey the task refers to.
- **Start Date** – The date and time when the task starts.
- **Recurrence** – The scheduled recurrence of the task, for example, weekly or monthly.
- **Next Occurrence** – The date and time when the task will be performed next time.

The **Tasks** grid displays the first 10 tasks by default. To view more tasks per page, select **25**, **50**, or **100** next to **View per Page** option at the bottom of the **Tasks** grid. To change the width of a column, drag its edge.

If the **Tasks** grid has more than one page, you can navigate through pages by using the page navigation arrows in the lower-right corner of the **Tasks** grid.

To manage tasks, use the following options on the toolbar:

- **Filter** – Filter the tasks by survey or event type.
- **Cancel** – Stop recurrence of the scheduled reports and scheduled export of responses by a task type. The canceled recurrence will be added to the **Transaction Events** page with the **Task Cancel** action type and the **Delivery Schedule** will be updated to **No Schedule**, but the message body, subject, and recipients will not change.
  You can cancel recurrence only for the following task types:
  - **Export Responses Schedule**
  - **Export Responses to Folder Scheduled**
  - **Export Responses to SFTP Scheduled**
  - **Export Scheduled Survey Report**

  For other task types, the **Cancel** button is unavailable.

Configuration

Topics

General Setup

Navigation

Configuration tab > **General** tab > **General Setup** page.

You can define settings for your workgroup, portal, panel, and library.

To save your changes, click the **Save Setup** button at the bottom of the **General Setup** page.

Workgroup Setup

In the **Workgroup Setup** section, you can define the following options:

- **Workgroup Name** – Enter the workgroup name, which appears in the application banner when you log in.
- **Workgroup Description** – Enter a short description of the workgroup.
- **Theme** – View the theme for the workgroup.
- **ID** – The workgroup ID number.
- **Survey Publish Warning** – Provide a custom warning that will appear in the **Open Your Survey Now?** dialog box for all survey authors in the workgroup. You can type up to 255 characters in the text box. If you do not specify any custom warning, the default message opens.

> This option is only available for users with the **Group Administrator** role.

- **Enable automatic survey permanent deletion** – Allow the permanent deletion of the surveys from the recycle bin after a specified number of days.

> Enable automatic survey permanent deletion is available only for users with the **Group Administrator** role.

- **Enable publishing to social media sites** – Allow survey authors to publish **Generate Link** survey links to social media sites (for example, Facebook, Twitter, and LinkedIn) within the workgroup. This option is useful if corporate policy prohibits sharing the company branding on personal social networks.
- **Enable significance testing in Cross-tab Analysis** – Disable significance testing using the **Cross-tab Analysis** report for the users in the workgroup.
- **Enable Public Report** – Allow the workgroup members to share reports with the users that do not have access to the application.
- **Enable Public Dashboard** – Allow the workgroup members to share dashboards with the users that do not have access to the application.
- **Automatically remove insecure code from survey designer** – Removes the insecure code that is entered outside of the Code Blocks for the users who do not have the **Edit Code Blocks** permission selected. This option is available for Group Administrator, Survey Administrator, and custom roles with the **Configure Workgroup Options** permission selected.

Portal Setup

In the **Portal Setup** section, you can define the following options:

- **Enable Portal** – Select the option to enable the portal.
- **Portal URL** – This field is completed automatically if you purchase the EFM Community Builder Module (VCBM) portal product.
- **Portal Registration Profile** – If you want your portal members to complete after they register, select the profile.
- **Require Approval** – If you want administrator to approve each portal registration before the user gains access to the portal, select this check box.

Panel Setup

In the **Panel Setup** section, you can change the default health score for the panel. The health score shows the average activity rate of the panelist. A number of factors determine the health score, for example, email opening rates, survey start and completion rates, and unsubscribe rates. The health score is a value from 0 to 100%.

- **Healthy Panel Threshold** – Enter a value for the healthy score in the provided text box.
- **Unhealthy Panel Threshold** – Enter a value for the unhealthy score in the provided text box.

Library Setup

In the **Library Setup** section, you can define the following options:

- **Enable Featured Survey Themes** – Select this check box to allow users in the workgroup to use precreated featured survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable Standard Survey Themes –** Select this check box to allow users in the workgroup to use precreated standard survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable Legacy Survey Themes** – Select this check box to allow users in the workgroup to use precreated legacy survey themes. It applies to the themes on the **Library** > **Survey Themes** tab and on the **Formatting** tab in the survey designer.
- **Enable use of System Report Themes** – Select this check box to allow users in the workgroup to use precreated system report themes. It applies to the themes on the **Library** > **Report Themes** tab and on the **Formatting** tab in the report designer.
- **Enable use of System Survey Templates** – Select this check box to allow users in the workgroup to use precreated system survey templates. It applies to the templates on the **Library** > **Survey Templates** tab and on the **New** menu on the **My Surveys** page.

If a featured (standard or legacy) theme is applied to a survey, and you clear the **Enable Featured (Standard or Legacy) Survey Themes** check box, the selected theme still appears in the **Survey Theme** menu on the **Survey Formatting** tab, but no other featured (standard or legacy) themes are available.

If a system theme is applied to a report, and you clear the **Enable use of System Report Themes** check box, the selected theme still appears in the **Report Theme** menu on the **Report Formatting** tab, but no other system report themes are available.

Advanced Text Analytics

In the **Advanced Text Analytics** section, you can disable users in the workgroup to export the survey response data for the advanced text analysis by selecting the **Disable Export for Text Analysis** check box.

> The **Advanced Text Analytics** section is available only for the workgroups with the granted Advanced Text Analytics license. To enable the license, contact your system administrator.

Embedded Text Analytics

In the **Embedded Text Analytics** section, you can configure connection to one of the Text Analytics providers: **Verint Text Analytics** or **Verint Text Analytics Services**.

For **Verint Text Analytics** provider, type the URL to connect to the Text Analytics instance and enter the **User Name** and **Password** into the designated text boxes.

For **Verint Text Analytics Services** provider, type the corresponding URLs into the following text boxes:

- **Text Engine** – URL to the system that conducts the data analysis.
- **Configuration Service** – URL to the system that contains all configuration settings.
- **Search** – URL to the search engine.

> To disable Text Analytics connection, select **Disabled**.

You can test the configured connection by clicking **Test** below the **Embedded Text Analytics** section.

> The **Embedded Text Analytics** section is available only for the workgroups with the granted Embedded Text Analytics license. To enable the license, contact your system administrator.

SMS Gateway Settings

Navigation

Configuration tab > **SMS Gateway Settings** tab > **SMS Gateway Settings** page.

You can define the SMS gateway settings for your workgroup. By default, the SMS gateway settings are read only. To edit the SMS gateway settings, select the **Enable SMS Gateway** check box.

> The **SMS Gateway Settings** tab is only available for the workgroups with the SMS license enabled. To enable the license, contact your System Administrator.

In the **SMS Gateway Type** list, you can select the type of the SMS gateway to be used: **OPG**, **SMPP**, **MacroKiosk**, **Telefonica SDF**, or **Twilio**. The default value is **OPG**.

OPG SMS gateway type

The following settings are available for the **OPG** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.
- **Incoming Message Username** – User name used by the SMS gateway when sending messages to the EFM system.
- **Incoming Message Password** – Password used by the SMS gateway when sending messages to the EFM system.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** - Originating number or branded text that the invitation message comes from. This setting is optional.
- **Request Reply for Contact List Invitations** - Option that indicates if the message can be replied to the sender. When the check box is selected, then originating number is used for sending the invitation messages. By default, the check box is cleared, in this case the participants receive a message from the company.
  This value applies only to SMS invitations and does not apply to two-way SMS surveys.

Extended parameters

- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **windows-1252**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.

- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

SMPP SMS gateway type

The following settings are available for the **SMPP** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.
- **Second Outgoing Message Server** – Backup server or address for sending messages via the SMPP-Type 1 SMS gateway.
- **Port** – Port for sending messages via the SMS gateway.
- **SMPP Version –** Indication of the SMPP protocol version. The default value is **v3.3**.

Originating Number Settings

- **Originating Number – Number from which the participants receive messages and to which they can reply.**
- **Source TON** – Type of number (TON) value of a sender for sending messages via the SMS gateway.
- **Source NPI** – Numbering plan identification (NPI) value of a sender for sending messages via the SMS gateway.
- **Destination TON** – Type of number (TON) value of a recipient for sending messages via the SMS gateway. The default value is **0**.
- **Destination NPI** – Numbering plan identification (NPI) value of a recipient for sending messages via the SMS gateway.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.
- **Invitation Source TON** – TON value of a sender for sending the first messages via the SMS gateway.
- **Invitation Source NPI** – NPI value of a sender for sending the first messages via the SMS gateway.
- **Invitation Destination TON** – TON value of a recipient for receiving the first messages via the SMS gateway. The default value is **0**.
- **Invitation Destination NPI – NPI value for receiving the first messages via the SMS gateway.**

Extended Parameters

- **Receiver Parameters** – Parameters of a recipient.
- **Transmitter Parameters** – Parameters of a sender.
- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **utf-8**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.

- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

MacroKiosk SMS gateway type

The following settings are available for the **MakroKiosk** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.
- **Originating Routing Token** – Value used for sending messages via the SMS gateway. This setting is optional.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.
- **Service ID** – Value used for sending messages via the SMS gateway.

Extended Parameters

- **Send Message Encoding** – Gateway specific coding that is used for SMS messages. The default value is **utf-8**.
- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

Telefonica SDF SMS gateway type

The following settings are available for the **Telefonica SDF** SMS gateway type:

Outgoing Message Settings

- **Outgoing Message Server** – Server or address for sending messages via the SMS gateway.
- **Outgoing Message Username** – User name used to authenticate with the SMS gateway.
- **Outgoing Message Password** – Password used to authenticate with the SMS gateway.
- **Outgoing Header Username** – User name value used to communicate with the SMS gateway.
- **Outgoing Header Password** – Password value used to communicate with the SMS gateway.

Incoming Message Settings

- **Incoming Message URL** – URL to which the SMS gateway sends messages.
- **Incoming Message Username** – User name used by the SMS gateway when sending messages to the EFM system.

- **Incoming Message Password** – Password used by the SMS gateway when sending messages to the EFM system.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.

Extended Parameters

- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

Twilio SMS gateway type

The following settings are available for the **Twilio** SMS gateway type:

Twilio Settings

- **Account SID** and **Authentication Token** – Credentials that are received while configuring Twilio account.
- **Webhook URL** – The URL to the machine where ESI service is running.

Originating Number Settings

- **Originating Number** – Number from which the participants receive messages and to which they can reply.

Invitation Originating Identity Settings

- **Invitation Originating Identity** – Originating number or branded text that the invitation message comes from. This setting is optional.

Extended Parameters

- **HTTP Accept Language** – Language used when the SMS Gateway opens a survey in the EFM system. The default value is **cy;q=0.8,en;q=0.4**.
- **Filtered Out Error Codes** – List of unreported errors. The default value is **1105,1220**.

General settings

The following settings are available for all SMS gateway types:

- **Start Sending Time** – Specifies the time of the day when sending of outgoing SMS invitation messages starts.
- **Stop Sending Time** – Specifies the time of the day when sending of outgoing SMS invitation messages stops.
- **Sending Time Zone** – Specifies the time zone used to interpret the **Start Sending Time** and **Stop Sending Time**.
- **Sending Days** – Specifies the days of the week when sending of outgoing SMS invitation messages occurs.

- **Opt Out Terms** – Specifies the terms that, if included in a participant's response SMS, denote that a participant opts out of taking a survey. The default opt out term is **stop**. You can add more terms in a pipe (|) delimited list.

> If no sending days are selected, the error message notifying that no SMS invitation is sent appears after clicking the **Save Setup** button.

- **Error Survey URL** – Specifies the address of a survey that is used to collect error messages.
- **Maximum Outgoing Messages per Second** – Specifies the maximum number of outgoing messages per second. The default value is **0**. This setting is optional.

SMS staging directories

For each valid SMS gateway, the defined SMS gateway settings are stored in the staging directories located in the AppData directory. You can find the staging directories in the following locations:

- {EFM install} AppData/{GroupId}/sms/incoming
- {EFM install} AppData/{GroupId}/sms/realtime
- {EFM install} AppData/{GroupId}/sms/archive
- {EFM install} AppData/{GroupId}/sms/error
- {EFM install} AppData/{GroupId}/sms/process

Publishing Setup

Navigation

Configuration tab > **Publishing** tab > **Publishing Setup** page.

You can define the Web locations and options for publishing surveys within the workgroup and test your settings.

To save your changes, click the **Save Setup**.

You can configure the following settings:

- **Survey Engine Path** – Path to the CGI script used to process the surveys.
- **Web Survey Location** – Directory on the Web server where the published surveys for the current workgroup are located.

The **Publish To** section contains three options:

- **Local Web Server** – Surveys are published to the local file system. The path to the local Web server where the surveys are posted is specified in the **Local Publish Path** text box. It is the default setting. You can update it by clicking the **Refresh Local Publish Path** icon next to the text box.
- **Network Share** – Surveys are published to the shared network directory. The path to the shared network directory where your surveys are posted is specified in the **UNC File Path** field. This setting is useful if the application is hosted on a Web server farm.
- **Remote FTP Server** – Surveys are published to the remote FTP server. You need to provide the following information if you use this option:
    - FTP Server Name
    - FTP Port Number
    - Subfolder to publish to
    - User Name
    - Password
    - File Transfer Protocol (FTP or SFTP)

On the **Publishing Setup** page, you can also do the following:

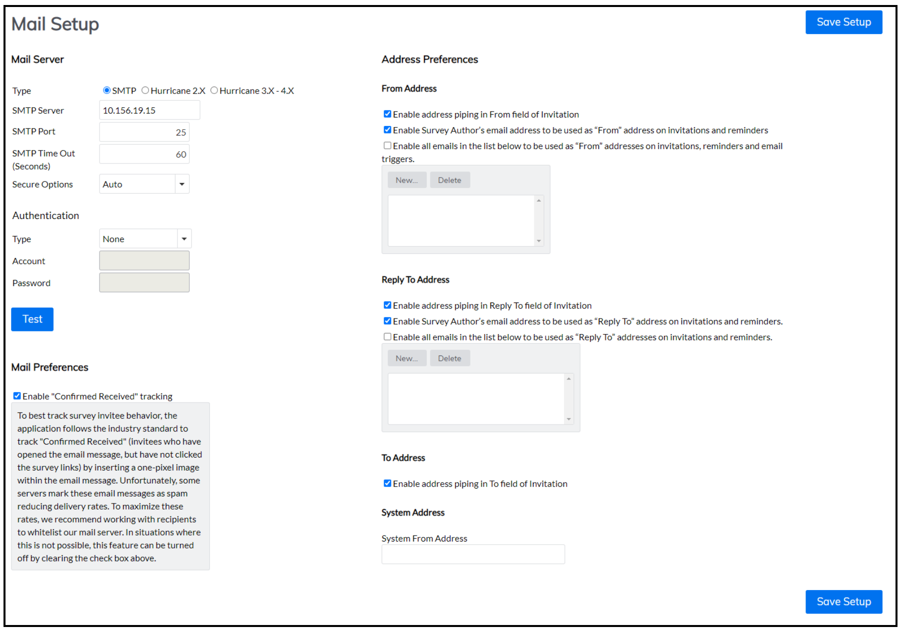
- **Test** – Test the survey publishing options. The passing or failing message appears.
- **Clear Cache** – Clear the cache content.

Mail Setup

Navigation

Configuration tab > **Mail Settings** tab > **Mail Setup** page.

You can select what type of mail server to use and customize the address preferences for the invitations and reminders emails.



The Mail Setup page

To apply your changes, click **Save Setup**.

All outgoing system messages have a unique mailing ID and message ID. So you can track all the emails in the email system logs, such as Hurricane. Examples of emails include: user name/password emails, triggers, case emails, schedule emails, participant emails, share report/dashboard/survey/data set, portal messages, test messages, export, messages sent by Web Services (errors), long running tasks, notify users, review actions, panel reports, survey invitations, etc.

Mail Server

In the **Mail Server** section, you can select between the SMTP and Hurricane mail server types. Depending on the server type that you select, the **Mail Server** section shows different properties.

SMTP Mail Server

- **SMTP Server** – Define the email server that is used by the EFM application.

- **SMTP Port** – Specify the SMTP port for the SMTP server defined. The default value is **25**.
- **SMTP Time Out (Seconds)** – Specify the time in seconds that EFM waits for a response from the SMTP server. The default value is **60**.
- **Secure Options** – Select the secure option of SSL and/or TLS encryption that is used for a connection for the SMTP mail server.

  The following options are available:
  - **Auto** – Select the secure option to decide automatically which SSL or TLS options to use. If the server does not support SSL or TLS, then the connection continues without any encryption.
  - **SSL On Connect** – Select the secure option if the connection should use SSL or TLS encryption immediately.
  - **Start TLS** – Select the secure option that elevates the connection to use TLS encryption immediately after reading greeting and the capabilities of the server. If the server does not support the Start TLS extension, then the connection fails and a NotSupportedException will be thrown.
  - **Start TLS When Available** – Select the secure option that elevates the connection to use TLS encryption immediately after reading the greeting and capabilities of the server, but only if the server supports the Start TLS extension.
  - **None** – No SSL or TLS encryption is used.

Authentication

- **Type** – Select the authentication type from the following options:
  - **None** – Select if no authentication is required.
  - **Auth Login** – A method of email authentication that passes the user name and password encrypted via base-64 encryption.
  - **CRAM-MD5** – A method of email authentication used by LDAP servers. The password is encrypted using the MD5 algorithm.
  - **DIGEST-MD5** – A method of SASL email authentication that performs authentication to the directory server with a user name and password in a way that does not expose the clear-text password.
  - **NTLM** – A method of email authentication that performs authentication to a server by using an IP Address.
  - **PLAIN** – A method of SASL email authentication that performs authentication to the directory server with a user name and password. The client can identify itself with a user name rather than a DN (Distinguished Name).
  - **SCRAM-SHA-1** – A method of email authentication that performs authentication by verifying the name of a user, password, and authentication database.
  - **SCRAM-SHA-256** – A method of email authentication that performs authentication by requiring the server-side password hashing.
- **Account** – Enter the account to use when authenticating.
- **Password** – Enter the account password when authenticating.

Hurricane Mail Server

- **Hurricane Server** – Define the email server that is used by the EFM application.
- **Hurricane Account** – Enter the account data.

To test your settings functionality, click **Test**.

Mail Preferences

In the **Mail Preferences** section, you can turn on tracking of the Confirmed Received invitation status by selecting the **Enable "Confirmed Received" tracking** check box (selected by default).

> The **Enable "Confirmed Received" tracking** check box is available for both SMTP and the Hurricane mail servers.

With this functionality, survey authors can track the Confirmed Received status on a user level by including the tracking pixel in the emails. Note that the tracking pixel can increase the chances that emails are viewed as spam. To maximize response rates, survey authors can turn off this feature if tracking of the Confirmed Received status is not critical.

> To turn on this functionality on a survey level, see Advanced Features of invitation, page 625. To turn on this functionality on a workgroup level, contact your Group Administrator.

If the **Enable "Confirmed Received" tracking** check box is selected, the Confirmed Received status is displayed in the following places of the EFM application:

- **Collect** tab > **Invitations** page and invitation mail details dialog box (see Invitations page, page 631).
- **Collect** tab > **Manage Participants** page > **Campaign Status**, **Initial Invitation Status**, **First Reminder Status**, **Second Reminder Status**, **Third Reminder Status**, **Fourth Reminder Status**, and **Thank You Status** columns.

Address Preferences

The **Address Preferences** section contains the **From Address**, **Reply To Address**, **To Address**, and **System Address** subsections. You can use them to define your email address preferences.

- **From Address** – The email address that the recipients of the email invitation see as the sender.
  - **Enable address piping in From field of Invitation** – Turn on the address piping in the **From** text box of invitation email.
  - **Enable Survey Author's email address to be used as "From" address on invitations and reminders** – Make a survey author's email address visible in the **From** text box.
  - **Enable all emails in the list below to be used as "From" addresses on invitations and reminders** – Make all email addresses from a defined list visible in the **From** text box and provide the ability to manage that list.
    - To add an email address to the list, click the **New** button.
    - To delete an email address from the list, select it in the list, and then click the **Delete** button.

- **Reply To Address** – The email address that the recipients reply to if they select to reply to the survey invitation.
  - **Enable address piping in Reply To field of Invitation** – Turn on the address piping in the **Reply To** text box of invitation email.
  - **Enable Survey Author's email address to be used as "Reply To" address on invitations and reminders** – Make a survey author's email address visible in the **Reply To** text box.
  - **Enable all emails in the list below to be used as "Reply To" addresses on invitations and reminders** – Make all email addresses from a defined list visible in the **Reply To** text box and provide the ability to manage that list.
    - To add an email address to the list, click the **New** button.
    - To delete an email address from the list, select it in the list, and then click the **Delete** button.
- **To Address**
  - **Enable address piping in To field of Invitation** – Turn on the address piping in the **To** text box of invitation email.
- **System Address**
  - **System From Address** – Define an alternative system address.

Related topics

Add an email address to list, page 1419

Add an email address to list

Navigation

Configuration tab > **Mail Settings** tab > **Mail Setup** page > **Address Preferences** section.

You can add new email address to the list.

Procedure

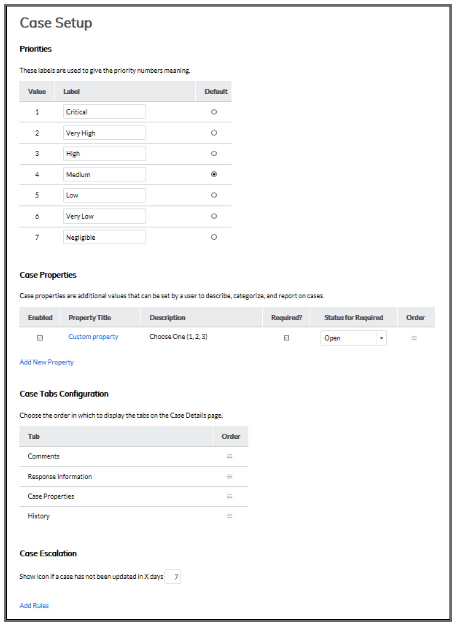
1. Go to the **Configuration** tab > **Mail Settings** tab > **Mail Setup** page.
2. In the **From Address** section, click the **New** button.
3. In the **Add Email** dialog box, in the **Email Address** box, type the email address that you want to add.
4. In the **Display Name** box, type the name of the email sender.
5. Click **OK**.
6. Click the **Save Setup** button.
7. To delete an email address from a list, select the email address, and then click the **Delete** button.
8. Click the **Save Setup** button.

Case Setup

Navigation

Configuration tab > **Case Setup** tab > **Case Setup** page.

The Case Administrators can customize the case priority options and create case properties as additional values that can be set by a user to describe, categorize, and report on cases. Also, they can configure the case escalation emails.



The Case Setup page

> The **Case Setup** tab is available only if the **Configure Case Settings** permission check box is enabled for the user role.

In the **Priorities** section, the following columns are available:

- **Value** – Set the numeric value of each priority option. The range of values is from 1 to 7, where 1 refers to the highest priority.
- **Label** – Enter the label text for the priorities into the text boxes. When you change the priority label, it is updated throughout the application. The character limit for the text labels is 64 characters. By default, the following priority labels are available:
  - **Critical**
  - **Very High**
  - **High**
  - **Medium**

    - **Low**
    - **Very Low**
    - **Negligible**
- **Default** – Set the default priority option for all new cases and case triggers by selecting the corresponding option.

  In the **Case Properties** section, the **Add New Property** link appears. Click the **Add New Property** link to add the following custom properties: **Choose One**, **Date**, or **Text**.

> You can add multiple properties of the same type.

The added case property appears in the **Case Properties** section as a hyperlink followed by the property choices.

You can move the rows with properties by using the icon in the **Order** column. The **Case Properties** appears in the set order on the **Case Details** page, in the **Case Properties** section.

You can edit the case properties by using the **Edit Case Property** dialog box, which opens when you click the property name.

> Editing choice labels affects all cases that currently use that choice.

In addition, you can define the visibility criteria for the case properties.

> By default, the new custom property is visible to all case users and appears on a **Case Details** page, in the **Case Properties** section. The **Not Set** check box is the default choice option.

You can hide the case properties for the case users by clearing the check box in front of the property that you want to hide.

You can also make the property required and select the status in which to enforce the requirement by clicking the **Required** check box and selecting the needed option from the **Status for Required** list next to the needed property. The required properties can have the following statuses: **Open**, **On Hold**, **Closed**.

> The hidden properties become unavailable for all cases.

In the **Case Tabs Configuration** section, you can choose the order in which to display the tabs on the **Case Details** page.

In the **Case Escalation** section, you can define when the icon appears in the **Cases** grid next to the cases that have not been updated for a certain time period. Enter the number of days in the text box in the **Case Escalation** section. By default, the time period is set to seven calendar days.

> You can enter only whole numbers in the text box.

Add Case Property

Navigation

Configuration tab > **Case Setup** tab > **Case Setup** page.

The Case Administrators can customize the case priority options and create custom properties as additional values that can be set by a user to describe, categorize, and report on cases. Also, they can add the case property.

Procedure

1 Go to the **Configuration** tab > **Case Setup** tab.

2 In the **Case Properties** section, click the **Add New Property** link.

3 In the **Add Case Property** dialog box, in the **Type** menu, select the case property type.

The following options are available:

- **Choose One** – Filter the cases by using the property followed by choices.

> You can select only one choice for the filtering.

- **Date** – Filter the cases by using the following options for date-based properties:
  - **Equal To**
  - **Not Equal To**
  - **Less Than**
  - **Greater Than**
  - **Less Than Or Equal**
  - **Greater Than Or Equal**
- **Text**– Filter the cases by using the following options for text-based properties:
  - **Equal To**
  - **Not Equal To**
  - **Contains**
  - **Does Not Contain**
  - **Begins With**
  - **Ends With**

4 In the **Label** text box, type the name for the case property.

5 In the **Choice** column, enter the text for the property choices into the corresponding text boxes.

6 In the **Enabled** column, select the check box next to the choice to make it available on the **Case Details** page for the user.

> By default, all choices are selected.

7 To add more choices, click the **Add Choice** link.

8 Click **Add**.

A new case property appears on the **Case Setup** page and on the **Case Details** page.

The **Value**, **Choice**, and **Enabled** columns are available only for the **Choose One** case property type.

Case Escalation

Navigation

Configuration tab > **Case Setup** tab > **Case Setup** page > **Case Escalation** section.

You can define which cases need to be reported in the emails by adding rules. You need to specify criteria for the case escalation emails and add the email contacts. When the criteria are met for a case, a notification email is sent to the specified emails. The email contains a list of cases matching the rules with their URL. The list is ordered from the newest to the oldest cases.

You can apply the data, age, and date filters to the cases.

Data Filter

In the **Data Filter** section, you can define the filter criteria based on your cases data. To add new criteria, click the **Add Another Criteria** link. The menus appear where you can specify the filter parameter, expression, and value.

- **Parameter** – Select the parameter by which you want to filter your cases data in the menu.

  The following options are available:
  - Assigned to
  - Priority
  - Status
  - Contact's Email
  - Contact's First Name
  - Contact's Last Name
  - Contact's Business
  - Contact's Phone
  - Date Opened
  - Date Closed
  - Last Modified
  - Created by
  - Source
  - Title
  - Description
- **Expression** – Select the expression in the menu to make a comparison between **Parameter** and **Value**. The options for expression may vary depending on the selected parameter. The following options are available:
  - Equals
  - Does Not Equal
  - Less than
  - Greater than
  - Less than or equal

  - Greater than or equal
  - Contains
  - Does Not Contain
  - Begins With
  - Ends With
- **Value** – Select the value for filtering criteria in the menu. The options vary depending on the selected parameter. For example, for the Status parameter, you need to select the needed case status from menu, and for the Contact's Email parameter, you need to type the contact data in the text box. For the date-related parameters, you need to specify a date either by using the text box or the calendar icon.
- **Save** – Click the link or anywhere else in the dialog box to save your criteria.

If you add multiple criteria, you can combine them by using the following **Match** options:

- **All Criteria** – All the criteria must be met.
- **At Least One Criterion** – At least one of the criteria must be met.
- **Advanced** – The menus with parentheses and the **And / Or** operators appear next to each criterion. The **And** operator defines that two or more filters linked together are true. The **Or** operator defines that one of the filters linked together is true.
- **Remove** – Click the icon to delete the filter criteria.
- **Up/Down** – Click or arrow to move the selected filter criteria up or down one level in the list. Filters are applied in a sequential manner, and their position in the list is important.

Age Filter

In the **Age** section, you can set the filter based on the date when cases are last modified, created, or closed X days (hours) ago. This filter is combined with the data filter. For example, you can set the following criteria:

Data Filter: Cases that are assigned to User1

and

Age: Cases that are modified (created or closed) in X days.

Date Filter

In the **Date Filter** section, you can set the filter based on the date when cases are opened, closed, or last modified and based on the selected time period.

- **Select Date Field** – Ffilter the cases based on their modification date.

  The following options are available:
  - **None** – Applies no date filter and is selected by default.
  - **Opened Date** – Applies the filter based on the date when the case was opened.
  - **Last Modified Date** – Applies the filter based on the date when the case was last changed.
  - **Closed Date** – Applies the filter based on the date when the case was closed.
- **Time Period** – Ffilter the cases based on a certain time period.

The following options are available:

- **None** – Applies no time period filter and is selected by default.
- **Today** – Shows the cases submitted today.
- **Current Week** – Shows the cases for the current week, no matter the current date.
- **Current Month** – Shows the cases for the current month, no matter the current date.
- **Current Quarter** – Shows the cases for the current three months, no matter the current date.
- **Current Year** – Shows the cases for the current calendar year, no matter the current date.
- **Year to Date** – Shows the cases for the period starting January 1st of the current year up until the current date.
- **Last Week** – Shows the cases for the past week.
- **Last Month** – Shows the cases for the past month.
- **Last Quarter** – Shows the cases for the past three months.
- **Last Year** – Shows the cases for the past year.
- **Custom Dates** – Shows the cases for the specific date range. When the **Custom Dates** option is selected, the **Start Date** and **End Date** text boxes appear. You can enter the date range in the corresponding text boxes manually or by clicking the icon.

To set the default values for the date filters, click the **Clear All Date Filters** link.

Delivery Options

You can schedule sending your case escalation emails by using two different methods:

- **No Scheduling** – Send your email later.
- **Send at a specific date and time** – Specify a date and time when you want to deliver your email. You can either type the date and time manually into the available text field or select the date and time from pop-up menus. Select a valid start date and time, otherwise the case escalation email will not be saved.

By clicking the **Show Recurrence Options** link, you can specify the recurrence options for your case escalation email delivery. Use this functionality to send an email multiple times on a daily, weekly, or monthly basis. In addition, you can set an end date or select **No End Date**.

Add rules for case escalation emails

Navigation

Configuration tab > **Case Setup** tab > **Case Setup** page > **Case Escalation** section > **Add Rules** link > **Add Condition** dialog box.

Procedure

1 Go to the **Configuration** tab > **Case Setup** tab.

1 In the **Case Escalation** section, click the **Add Rules** link.

2 In the **Add Condition** dialog box, in the **Description** text box, enter a short summary of the rule.

3 On the **Criteria** tab, click the **Add Another Criteria** link.

4 In the parameter list, select the parameter by which you want to filter your case data.

5 In the expression list, select the expression.

6 In the value list, select the value for filtering criteria.

7 Click the **Save** link.

8 To add more criteria, click the **Add Another Criteria** link.

9 Specify if either all or any of the criteria need to be met by selecting the corresponding option to the right of the **Match** section.

10 Click the **Age** section to expand it.

11 Select the check box next to the option you want to use, select the expression, type the number in the text box, and then select **Days** or **Hours** from the menu. For example, **Date Last Modified < 5 Days**.

12 Click the **Date Filter** section to expand it.

13 Select an option in the **Select Date Field** menu, and then select an option in the **Time Period** menu.

14 Click the **Email** tab.

15 In the **To** text box, type the email address of the person to receive the email.

16 In the **Cc** and **Bcc** text boxes, type the email addresses if required.

17 In the **Subject** text box, type the case escalation short description.

18 Set the delivery options for your email.

19 Click **OK**.

The escalation email will be sent according to the settings configured on the **Criteria** and **Email** tabs and the delivery options.

Edit rules for case escalation

Navigation

Configuration tab > **Case Setup** tab > **Case Setup** page > **Case Escalation** section > click a link of a rule > **Edit Condition** dialog box.

You can edit the case escalation criteria on the **Case Setup** page by using the **Edit Condition** dialog box. You can access the **Edit Condition** dialog box by clicking the rule description link on the **Case Setup** page.

You can move the rules up and down, copy, or delete the rules by using the corresponding icons.

When you click the rule description link, the **Edit Condition** dialog box opens. You can edit the existing rules and add new criteria by following the same steps as in the **Add Condition** dialog box.

Data policies

Navigation

Configuration tab > **Data Policies** page.

Use Data Policies to manage surveys, responses, notifications, and exclusions by selecting options to enforce survey and response behavior.

> To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.

Data Policies supports the four tabs, Surveys, Responses, Notifications, and Exclusions, that describe how to configure parameters to permanently delete surveys and responses.

- **Surveys** tab: Add a configuration option to enforce how long your surveys will remain open. In addition, you can automatically move closed surveys to the Recycle Bin, and permanently delete surveys after a fixed period of time.
- **Responses** tab: Configure your system to automatically delete any responses after a fixed period of time, permanently delete responses for closed surveys after a fixed period of time, or select to keep responses.

  If the workgroup is FI-enabled, response data present in Feedback Intelligence must be deleted manually and is not covered by these settings.
- **Notifications** tab: Configure your system to notify survey owners and other email recipients about upcoming deletions.
- **Exclusions** tab: If your surveys are configured to be deleted automatically, you can configure your system to exclude surveys that you want to keep from the automatic deletion process.

Related topics

Set a scheduled automatic response deletion, page 1432

Set a scheduled automatic survey closure, page 1429

Set a scheduled automatic survey deletion, page 1430

Set a scheduled permanent response deletion, page 1432

Set a scheduled permanent survey deletion, page 1431

Set notifications for survey owners about scheduled actions, page 1433

Set periodical reminders about scheduled deletions, page 1434

Exclude surveys from automatic deletion, page 1434

Set a scheduled automatic survey closure

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Surveys** tab.

Configure the time you want your surveys to remain open. Setting up this option will help you to manage your survey process more efficiently.

You can also allow users to delete surveys manually from the Recycle Bin by selecting the **Allow users to permanently delete surveys from the Recycle Bin** check box.

Before you begin

- To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Surveys** tab.
2. In the **Option** section, select the **Enforce a maximum amount of time for a survey to remain open** check box, and specify a value greater than 0. By default, it is set to 90 days.

> When you set the value, it affects other settings in the following way:
>
> Any open surveys that do *not have* a scheduled close date set, are updated with a close date according to the value you defined in this option, for example, surveys will close after 90 days from the day the option was set.
>
> Any open surveys that *have* a scheduled close date set, their scheduled close date remains the same as before, and are not impacted by this option.
>
> Any new surveys created in the workgroup, have a close date according to the value defined, for example, will close 90 days after the survey opens.

All settings that you define are saved automatically.

When configured, settings are saved, and the User Logs > Transaction Events page is updated with information about who made the changes and when.

Set a scheduled automatic survey deletion

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Surveys** tab.

You can configure your system to automatically move closed surveys to the Recycle Bin after a fixed period of time, or you can select to keep surveys.

> If the workgroup is FI-enabled, response data present in Feedback Intelligence must be deleted manually and is not covered by these settings.

Before you begin

- To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Surveys** tab.
2. In the **Automation** section, select the **Automatically move surveys to the Recycle Bin when closed after fixed period of time** option, and specify a value greater than 0.

By default, the **None** option is selected and surveys are not moved to the Recycle Bin .

> When selected, the first scheduled task is executed in seven days to allow users to receive a prior notification.

All settings that you define are saved automatically.

Following the setting configuration, task executions that take place are logged in the Task Logs with information about what surveys were deleted and when.

When configured, settings are saved, and the **User Logs** > **Transaction Events** page is updated with information about what surveys were deleted and when.

Set a scheduled permanent survey deletion

Navigation

Configuration tab > **Data Policies** tab > **Surveys** page.

You can configure your system to permanently delete surveys that are located in the Recycle Bin after a fixed period of time, or you can select to keep surveys.

> For surveys moved to the Recycle Bin before the option was activated, the automatic permanent deletion date is scheduled based on the date the option was activated (that is in 90 days from the day when auto-deletion was scheduled, not from when the surveys were moved to Recycle Bin).

Before you begin

- To view the **Data Policies** page and delete the surveys permanently, ensure that you have the **Manage Data Policies** and the **Permanently Delete Surveys** permissions. By default, it is enabled for Group Administrators and Survey Administrators.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Surveys** tab.
2. In the **Data Retention** section, select the **Permanently delete surveys located in the Recycle Bin after a fixed period of time** option, and specify a value greater than 0.

   By default, the surveys are not deleted and the **None** option is selected.

> When selected, the first scheduled task is executed in seven days to allow users to receive a prior notification.

> When you set the value, it affects other settings in the following way:
>
> Any surveys that are used in *data sets* and *Unified Data Sets*, are not deleted and this information is tracked in Task Details.
>
> Any surveys added to *Advanced Dashboard* will be deleted according to the value you set even though you cannot delete them manually.

All settings that you define are saved automatically.

Following setting configuration, task executions that take place are logged in the **Task Logs** with information about what surveys were deleted and when.

When configured, settings are saved and the **User Logs** > **Transaction Events** page is updated with information about what surveys were deleted and when.

Set a scheduled automatic response deletion

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Responses** tab.

You can configure your system to delete responses automatically after a fixed period, or select to keep responses. You can change the default values of time-based settings to any value greater than 0.

> If the workgroup is FI-enabled, response data present in Feedback Intelligence must be deleted manually and is not covered by these settings.

Before you begin

- To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Responses** tab.
2. In the **Automation** section, select the **Automatically delete any response after a fixed period of time** option, and specify a value greater than 0. The default value is 180 days and applies to all surveys, including the ones in a **Design** mode.

   By default, the **None** option is selected.

> When selected, the first scheduled task is executed in seven days to allow users to receive a prior notification.

All settings that you define are saved automatically.

When configured, settings are saved and the **User Logs** > **Transaction Events** page is updated with information about who made the changes and when.

Set a scheduled permanent response deletion

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Responses** tab.

You can configure your system to permanently delete responses for closed surveys after a fixed period, or select to keep responses.

Before you begin

- To view the **Data Policies** page and delete the responses permanently, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey

Administrators.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Responses** tab.
2. In the **Data Retention** section, select the **Permanently delete responses for closed surveys after a fixed period of time** option, and specify a value greater than 0. The default value is 90 days.

> When selected, the first scheduled task is executed in seven days to allow users to receive a prior notification.

The **None** option is selected by default.

All settings that you define are saved automatically.

When selected, an automated nightly process checks the time that has passed after a survey is closed. If this is more than the specified number of days, the responses are permanently deleted.

Following the setting configuration, task executions that take place are logged in the **Task Logs** (permanent delete) with information about which responses were deleted and when.

When configured, settings are saved and the **User Logs** > **Transaction Events** page is updated with information about who made the changes and when.

Set notifications for survey owners about scheduled actions

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Notifications** tab.

You can set one-time or periodical notifications about scheduled survey or response deletions for survey owners and users with whom the survey is shared.

You receive a separate email message for each survey.

Before you begin

- To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.
- To receive notifications, you must be a Group or Survey Administrator, a user with the **Data Retention Notifications** permission, a survey owner, or a user with whom the survey is shared.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Notifications** tab.
2. In the **Survey Specific Notifications** section, select the **Notify survey owners and shared users starting a fixed period of time before the deletion** option, and the value greater than 0. By default, it is set to 90 days.
3. To schedule notifications recurrence, in the **Recurrence Options** list, select the needed options.

All settings that you define are saved automatically.

When configured, settings are saved, and the **System Tasks** > **Tasks** page is updated with the list of users and email addresses who received the notification.

Set periodical reminders about scheduled deletions

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Notifications** tab.

You can set a reminder about all scheduled survey and response deletions in your workgroup to all users of the workgroup and to any additional recipients who have the **Data Retention Notifications** permission.

Before you begin

- To view the **Data Policies** page, ensure that you have the **Manage Data Policies** permission. By default, it is enabled for Group Administrators and Survey Administrators.
- To receive notifications, you must be a Group or Survey Administrator, a user with the **Data Retention Notifications** permission or a user added to the **Additional Email Recipients** list, a survey owner, or a user with whom the survey is shared.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Notifications** tab.
2. In the **Survey Summary Notifications** section, select the **Notify users periodically via email about upcoming deletions** check box. By default, it is set to 14 days.
3. To add additional recipients, in the **Additional Email Recipients** list, click the **New** button and type email address and display name.

All settings that you define are saved automatically.

When configured, settings are saved, and the System Tasks > Tasks page is updated with the list of users and email addresses who received the notification.

Exclude surveys from automatic deletion

Navigation

Configuration tab > **Data Policies** tab > **Data Policies** page > **Exclusions** tab.

If your surveys are configured to be deleted automatically, you can configure your system to exclude surveys that you want to keep from the automatic deletion process. Only **surveys** are currently supported for exclusions and data policies.

All surveys added to the Exclusions list, are excluded from all automated retention policies. If you want to delete the surveys that are excluded from the automatic deletion, you must do it manually.

Before you begin

- To view the **Data Policies** page and delete the surveys permanently, ensure that you have the **Manage Data Policies** and the **Permanently Delete Surveys** permissions. By default, it is enabled for Group Administrators and Survey Administrators.
- To exclude other user's surveys, ensure that you have the **Group Administrator** role with the **View All Surveys** permission.

Procedure

1. Go to the **Configuration** tab > **Data Policies** tab > **Exclusions** tab.

2 Click the **Add Project** button.

3 In the **Add Project to Exclusions List** dialog box, select a survey to exclude, and click **Add**.

> You can select your own surveys to exclude, as well as surveys shared with you. Surveys in the Design mode are also available and can be added to the Exclusions list.

4 (Optional) If you select a survey to exclude from automatic deletion, which is currently in the recycle bin, you have the option to restore the survey from the recycle bin, or leave it in the recycle bin by clicking the **Yes** or **No** button correspondingly. In both cases, the surveys remain excluded and will not be deleted.

5 (Optional) To remove a survey from the **Exclusions** list, select the survey in the grid, and click the **Remove from List** button.

After you remove surveys from the **Exclusions** list, the automatic survey deletion will apply to these surveys, during the next task run.

When configured, settings are saved, and the **User Logs** > **Transaction Events** page is updated with information about who made the changes and when.

Workflow

Navigation

Configuration tab > **Workflow** tab > **Workflow** page.

You can assign the users in your workgroup a role of the survey reviewer or assisted survey author. These roles are used in the survey approval process.

In some companies, the survey and invitation content must be reviewed and approved by someone other than the survey author (for example, marketing or legal department) before the survey becomes available externally.

Users who require approval to open a survey are called assisted survey authors. Users who approve a survey are called survey reviewers. An assisted survey author cannot open a survey or republish a live survey without the prior reviewer's approval of the content. A survey reviewer can accept or decline a survey submitted for review.

Assign user a survey reviewer role

Procedure

1. Go to the **Configuration** tab > **Workflow** tab.
2. On the **Workflow** page, in the **Users** text box, enter a partial or whole user name.
3. Select the user name to whom you want to assign a survey reviewer role.
4. To add the user name to the **Survey Reviewers** list, click the right double arrows button.

To cancel the assignment and move the user name back to the Users list, click the << arrow.

Assign user an assisted survey author role

Procedure

1. Go to the **Configuration** tab > **Workflow** tab.
2. On the **Workflow** page, in the **Users** text box, enter a partial or whole user name.
3. Select the user name to whom you want to assign an assisted survey author role.
4. To add the user name to the **Assisted Survey Authors** list, click the left double arrows button.

To cancel the assignment and move the user name back to the Users list, click the << arrow.

External Data Sources

Navigation

Configuration tab > **External IDs** tab > **External Data Sources** section.

In the **External Data Sources** grid, you can add and delete external data sources and set one of them as default.

The name of the new data source should be unique.

The following columns are available in the **External Data Sources** grid:

- **External Data Source Key** – Name of the data source that is used as an ID of the external source when importing data. To edit the data source description, lick a data source name.
- **Description** – Name or short explanation of the data source key.
- **Default** – Data source that is used by default. The default external source is used when an external ID is provided without a specific reference to an external source name.

By default, your external data sources are sorted by the **External Data Source Key** column in the **External Data Sources** grid. If you want to change how your data sources display in the grid, click a column header (**External Data Source Key** or **Description**). An arrow appears up (ascending) or down (descending) to show the sort order. You can also change a column width by dragging the edge of the column header.

The default number of data sources per page is 10; however, you can select up to 100 data sources to display in the **External Data Sources** grid. You can also navigate through the pages of data sources by using the scroll arrows at the bottom of the page.

To manage all data sources, select the check box in the upper-left corner of the **External Data Sources** grid.

Manage external data sources

Navigation

Configuration tab > **External IDs** tab > **External Data Sources** section.

In the **External Data Sources** grid, you can add and delete external data sources and set one of them as default. The name of the new data source should be unique.

Add an External Data Source

Procedure

1 Go to the **Configuration** tab > **External IDs** tab.

1 In the **External Data Sources** grid, click the **New** button.

2 In the **Add External Data Source** dialog box, in the **External Data Source Key** text box, enter the name of the data source.

3 In the **Description** text box, enter the data source description.

4 Click **OK**.

Delete an External Data Source

Procedure

1 In the **External Data Sources** grid, select the check box next to the data source that you want to delete.

2 Click the **Delete** button.

> Removing a data source will affect any new imports or responses configured to use this data source. All user and organization external IDs associated with this data source will also be removed.

3 In the confirmation dialog box, click **Delete**.

Edit an External Data Source

Procedure

1 In the **External Data Sources** grid, click the data source key.

2 In the **Edit External Data Source** dialog box, in the **Description** text box, edit the data source description.

3 Click **OK**.

> You can edit only the data source description. The data source key cannot be edited because it is used as an ID of the external source while importing data.

Set an External Data Source as Default

Procedure

1. In the **External Data Sources** grid, select the check box next to the data source that you want to set as default.
2. Click the **Set as Default** button.

   The data source is set as default and is marked with a green check mark in the **Default** column.

The **Set as Default** button is available only if one external data source is selected.

External Sources Administration Control

Navigation

Configuration tab > **External IDs** tab > **External Connections** section.

Group and survey administrator can control the workgroup members' access to the external connections based on the user role set of permissions. You can use the **External Connections** functionality to turn the external connections on or off for a workgroup. The **External Connections** grid displays a number of columns, including:

- **Name** – Shows the external connection name.
- **Description** – Shows the external connection description.
- **Status** – Shows whether the external connection is active or not.

> The External Connection functionality is available if you have a license to use the External Source feature.

You can also enable the external connections for a single user by creating a new role or editing the existing ones on the **Administration** tab, on the **Roles** tab.

When the external connection is enabled for a workgroup by administrator, the **External IDs** side tab appears on the **My Account** page, where you can configure the external connections. When survey administrator turns off the external connection, which is currently in use, the dashboard items no longer display the data from the disabled connection.

Chapter 40

Single Sign On integration

Topics

Single Sign On integration

Single Sign On (SSO) occurs when a user logs in to one application and remains logged in to another third-party service automatically, regardless of the platform or domain the user is using.

A System Administrator enables SSO between EFM and other third-party service so that end users do not have to enter their user names and passwords every time they switch the applications.

A System Administrator creates and manages application credentials, and assigns those credentials to workgroups that need access to the application. In that way, users created within the specific workgroup gain single sign-on access to the third-party application simply by clicking the provided link in the EFM application.

A user can access the EFM application by entering the user name (or the email address) and the password provided by a System Administrator. To log in to the application, each user needs to have a unique email address. If the email address is assigned to two or more accounts, then access is possible by providing a user name.

> For details on Service Provider and Identity Provider support in EFM, refer to the *EFM SSO Integration Guide*.

If you use SSO with a certificate file (either for encryption or signing), you can see a warning message with the expiration period details.

SSO certificate expiration warning message

Chapter 41

My Account

Topics

My Account page

Navigation

Account menu > **My Account** option.

You can edit your profile information, change your EFM password, define settings for your login experience, decide what charts are selected by default for reports, enable advanced designer options, and adjust email settings.

Profile Information

In the **Profile Information** section, you can define the following options:

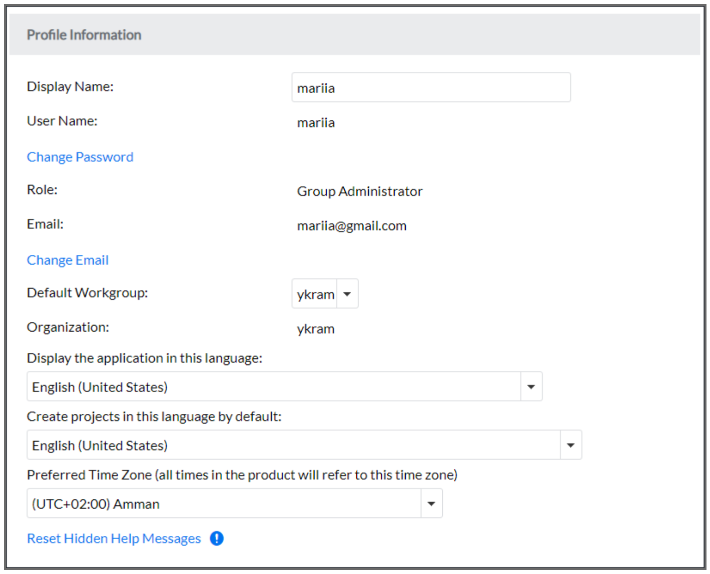
- **Display Name** - Enter the name that you want to be displayed in the application.
- **User Name** - The name that you use to log in to the application. Only System Administrator can define and update a user name.
- **Change Password** - Change your password by clicking the link.
- **Role** - The user role determines the access level and defines permissions for users to perform a group of tasks in the application. System Administrator assigns a role to each user within the workgroup.
- **Email** - The email address that you use to log in to the application.
- **Change Email** - Change your email address by clicking the link.

> If your new email address is not unique, an error message appears saying that this email is already used by another user.
> To confirm email address change, you need to enter the confirmation code that you receive to your new requested email address.

- **Default Workgroup** - Select your default workgroup.
- **Organization** - The organization that you are assigned to. System Administrator assigns users to the organization.
- **Display the application in this language** - Select the language of the application user interface.
- **Create projects in this language by default** - Select the language for your projects.
  The survey languages are divided into two groups:
  - **Language Pack Support** – This group includes the survey languages that are supported by the system language packs. A language pack contains the default validation messages, labels, and end pages of the survey in a certain language and is applied to your survey automatically.
  - **Additional Translation Required** – This group includes all languages, except the languages supported by the system language packs. You need to translate the validation messages, labels, and end pages of your survey into the selected language.

If you select the blank option in the **Display the application in this language** list, the application will be displayed in the language of your web browser.
If you select the blank option in the **Create projects in this language by default** list, the project will be created in the language selected for the application.

- **Preferred Time Zone (all times in the product will refer to this time zone)** - Select the time zone for the EFM application. All your projects will refer to this time zone.
- **Reset Hidden Help Messages** - Click the link to display features that were previously hidden by clicking **Hide This** or **Don't show this message again** links within the application.



The Profile Information section

After login, if the application language or time zone is not configured, the **Preferences** page opens. You can set your preferences for time, dates, and numbers to be displayed correctly in the EFM application. To proceed to the application, click **Continue**.

Define Log-on Experience

- **Remember the last selected survey project on login** - Select the check box to remember the last survey project you worked on.
- **Display dashboard after login** - Select the check box to display the **Dashboard** page after logging in to the application.

Reports

- **Default chart type for a Choose One question**
- **Default chart type for a Choose Many question**
- **Default chart type for a Matrix question**

Survey Properties

- **Enable Advanced Designer Options** – Select the check box to view the following items:
    - **Outline and Flow**, **HTML**, and **XML** tabs on the **My Surveys** page.
    - Custom End Pages on the **Pages** tab.
    - Group and project IDs in **Survey Designer** > **Properties** > **API Access**.
    - Campaign ID next to the campaign name, for example, (1) Passcode.
    - Culture code next to **Translation** > **Languages**.

Email

- **Email confirmation is required for processes exceeding** - Type the number of minutes you want the system to wait before sending an email confirmation message.

About

The **About** section displays a copyright statement and information about the Open Source Attribution, End User License, and Intellectual Property Notice.

To save all your changes and preferences, click **Save** either at the top or at the bottom of the **My Account** page.

External Sources

Navigation

Account menu > **My Account** option > **External IDs** tab.

You can add, configure, and delete the connection to the external sources in EFM that you have access to. You can add as many connections to the same external source as you want.

The **External IDs** grid displays the following columns:

- **Name** – The name of the connection.
- **External Source** – The source of the connection.
- **Configuration** – The URL of the external source.

The **External IDs** tab is available only if you have a license to use the External IDs feature. Currently, you can configure only the **Impact 360 Text Analytics** source.

Manage External Sources

Navigation

Account menu > **My Account** option > **External IDs** tab.

You can add, edit, and delete the connection to the external sources that you have access to.

> The **External IDs** tab is available only if you have a license to use the External Source feature. Currently, you can configure only the **Impact 360 Text Analytics** source.

Add the Impact 360 Text Analytics source

Procedure

1 On the **External IDs** page, on the toolbar, click the **New** button.

2 In the **Configure Source** dialog box define the following:
- **Connection Name** - Enter the name of the connection to the external source.
- **External Source** - The **Impact 360 Text Analytics** external source is selected by default.
- **URL** - Enter the Embedded Text Analytics URL.
- **User Name** - Enter the name that you use to log in to the application.
- **Password** - Enter the password you use to log in to the application.

3 To add a new source to the **External IDs** grid, click **Save**.

> When you save the external source configuration, your credentials are saved in the database for future sessions.

Edit the Impact 360 Text Analytics source

Procedure

1 On the **External IDs** page, click the name of the external source that you want to edit.

2 In the **Configure Source** dialog box, edit the **Impact 360 Text Analytics** source settings.

3 To update the external source, click **Save**.

Delete the Impact 360 Text Analytics source

Procedure

1 On the **External IDs** page, select the check box next to the external source that you want to delete.

2 On the toolbar, click the **Delete** button.

3 In the confirmation dialog box, click the **Remove Selected Sources** button.

When you delete the external source that is currently in use, the dashboard items no longer display the data from the deleted source.

Tasks–History view

Navigation

Account menu > **My Account** option > **Tasks** tab > **History** view.

You can view the history of the tasks performed in the application, such as test survey, export responses, import participants, or send invitations with the **History** task view. You can also track the progress of the tasks that potentially require a longer period of time to be completed.

In the **Tasks** grid, the following columns are available:

- **Event** – The event type.
- **Event Details** – The name of the survey that the task refers to.
- **Start Date** – The date and time when the task starts.
- **Elapsed Time** – The time during which the task is performed.
- **Status** – The task statuses are in progress, completed, removed, cancelled, deferred, completed with errors, or failed.
- **Execution Location** – The location where the task or request was executed, for example, the web application or scheduler service.

The **Execution Location** column is available only for the group and system administrators.

The **Tasks** grid displays the first 10 tasks by default. To view more tasks per page, click **25**, **50**, or **100** next to the **View per Page** option at the bottom of the **Tasks** grid. To change the width of a column, drag its edge. If the **Tasks** grid has more than one page, you can navigate through pages by using the page navigation arrows in the lower-right corner of the **Tasks** grid.

To manage tasks, use the following options on the toolbar:

- **Cancel** – Stop the task execution.

The **Cancel** button is only available for the tasks with the **In Progress** status.

- **Filter** – Filter the tasks by the survey, event type, status, or task execution start and end dates.

System Tasks – Scheduled view

Navigation

Account menu > **My Account** option > **Tasks** tab > **Scheduled** view.

You can track all future tasks that you have scheduled in the application, such as test survey, export responses, import participants, or send invitations with the **Scheduled** task view.

In the **Tasks** grid, the following columns are available:

- **Event** – The event type.
- **Event Details** – The name of the survey the task refers to.
- **Start Date** – The date and time when the task starts.
- **Recurrence** – The scheduled recurrence of the task, for example, weekly or monthly.
- **Next Occurrence** – The date and time when the task will be performed next time.

The **Tasks** grid displays the first 10 tasks by default. To view more tasks per page, select **25**, **50**, or **100** next to **View per Page** option at the bottom of the **Tasks** grid. To change the width of a column, drag its edge.

If the **Tasks** grid has more than one page, you can navigate through pages by using the page navigation arrows in the lower-right corner of the **Tasks** grid.

To manage tasks, use the following options on the toolbar:

- **Filter** – Filter the tasks by survey or event type.
- **Cancel** – Stop recurrence of the scheduled reports and scheduled export of responses by a task type. The canceled recurrence will be added to the **Transaction Events** page with the **Task Cancel** action type and the **Delivery Schedule** will be updated to **No Schedule**, but the message body, subject, and recipients will not change.
  You can cancel recurrence only for the following task types:
  - **Export Responses Schedule**
  - **Export Responses to Folder Scheduled**
  - **Export Responses to SFTP Scheduled**
  - **Export Scheduled Survey Report**

  For other task types, the **Cancel** button is unavailable.

Set a filter for a task in History view

Navigation

Account menu > **My Account** option > **Tasks** tab > **Scheduled** view.

You can filter the tasks performed in the application with the **History** task view by applying different filter settings.

Procedure

1 On the **Tasks** page, click the **Filter** button.

2 In the **Filter Tasks** dialog box, from the **Survey** list, select the survey name for filtering.

3 In the **Event Type** list, select the task type for filtering.
You can filter by group of events, such as all distribution actions, all import actions, all export actions, or all miscellaneous.

4 In the **Status** list, select the task status for filtering.

5 In the **Start Date** text box, type the start date manually or use the **Calendar** icon .
The current date is selected by default.

6 In the **End Date** text box, type the end date manually or use the **Calendar** icon .
The current date is selected by default.

You can click the **Time View** icon to open the Time Picker.

7 To apply the filter changes, click **OK**.

On the **Tasks** page, the notification appears about current filter settings.

To change or delete the applied filter, click the **Edit** or **Clear** links correspondingly.

Change a workgroup

Navigation

Log in to the application > **Workgroup** menu.

A workgroup is a set of users who can collaborate within the EFM application. You can create workgroups, such as R&D workgroup, HR workgroup, Marketing workgroup, and others to work in the protected environments. Each workgroup has access to only their environment while Group Administrator can manage all workgroups.

You can quickly and easily share questionnaires and other data in your workgroup, allowing other users in the same workgroup to view, edit, and analyze the same data.

Procedure

1. Select the workgroup on the **Workgroup** menu.
2. If you belong to more than 10 workgroups, the **Change Workgroup** dialog box appears.
3. Type the needed workgroup name or ID, and click **Search**.
4. Select the needed workgroup name, and click **OK**.

Mobile apps

Topics

Mobile apps overview

A mobile version of EFM is available on the mobile devices including the Apple iPhone, iPad, and the Android smart phone.

The EFM mobile apps provide access to:

- **My Surveys** folders and list of surveys
- **Shared Surveys** folder and list of surveys
- Ability to view **Survey Status**
- Option to send a **Survey Link** from the device
- Ability to view campaign information
- Ability to view response history
- Option to review a mobile report

For more details, click your device name:

- EFM Mobile apps–iPhone, page 1456
- EFM Mobile apps–iPad, page 1459
- EFM Mobile apps–Android, page 1461

> EFM Mobile does not currently support customer accounts that require SSO for authentication in the EFM platform. Currently, the EFM Mobile login page has not been designed with the custom header values, and therefore cannot successfully authenticate using the SSO server.

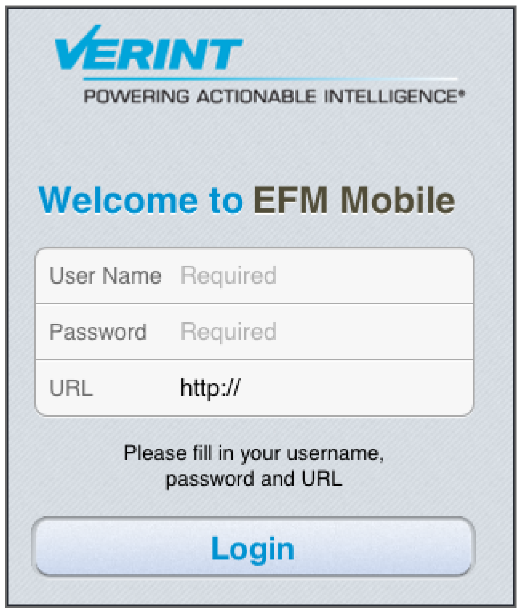
EFM Mobile apps–iPhone

Install the EFM Mobile iPhone app

1. Go to your iPhone App store, and then search for **EFM Mobile**.
2. Click **Free**, and then click **Install**.

Log in to EFM Mobile (iPhone)

1. On the iPhone touch screen, tap the **EFM Mobile App** icon.
   The **Welcome to EFM Mobile** screen appears.



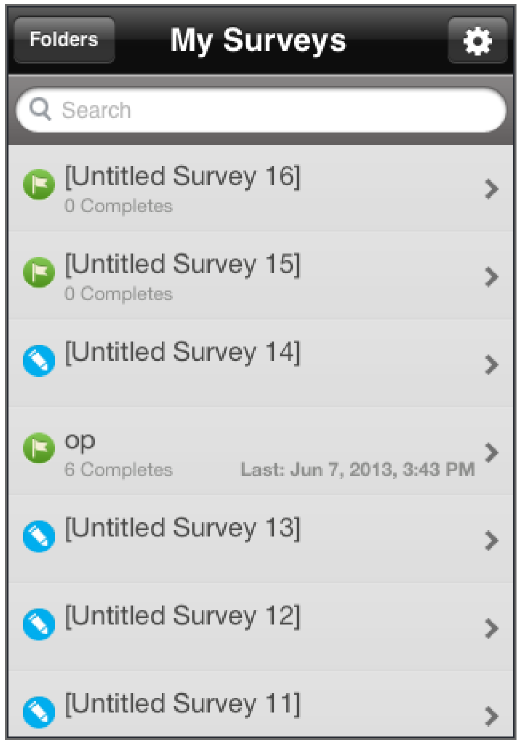
iPhone EFM Mobile Login screen

2. Enter the following required information:
   - **User Name** – The name that you use to log in to the EFM application.
   - **Password** – The password that you use to log in to the EFM application.
   - **EFM application URL** – The URL where EFM is located.
   - Tap **Login**.
     The **My Surveys** page appears.

My Surveys page

The **My Surveys** page provides access to your surveys (including SMS surveys), folders, and settings. Select a survey in the list of surveys. You can also view the surveys that are shared with you. Go to the

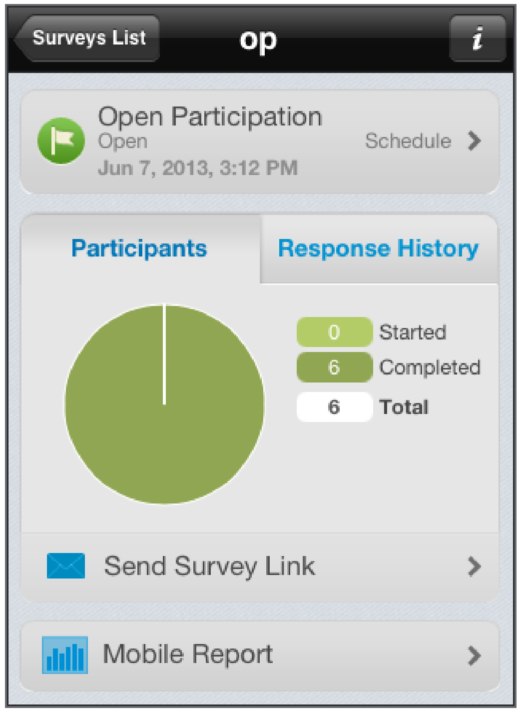
Folders > **Shared Surveys** folder.



iPhone Mobile > My Surveys page

Procedure

1 In the **My Surveys** list, select a survey.
The survey information screen appears.



Survey information screen

2 On the survey information screen, you have access to:

- **Participant Status** – View the number of participants who started and completed your survey and the total number of participants. The **Over Quota** and **Branched Out** statuses appear only if there are any data for over quota and branched out.
- **Response History** – Display the chart view of the response history.
- **Send Survey Link** – Email your survey link and invitation to one of your contacts.
- **Mobile Report** – View the mobile report for each of your survey questions. You have the ability to page through each question using the arrows, or tap the button in the middle to display the list of all questions. In the list of questions you can tap and display responses for that question.

To display the **Settings** screen, change your workgroup, or log out of the EFM Mobile Application, tap the **Settings** icon .

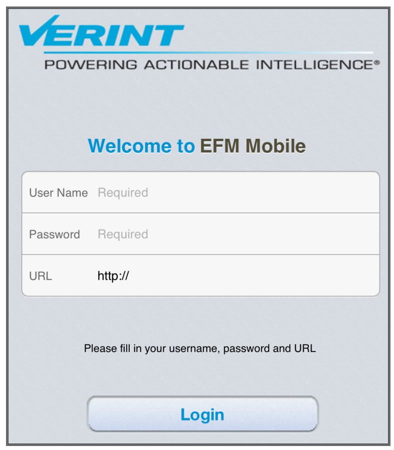
EFM Mobile apps–iPad

Install the EFM Mobile iPad app

1. Go to your iPad App store, and then search for **EFM Mobile**.
2. Click **Free**, and then click **Install**.

Log in to EFM Mobile (iPad)

1. On the iPad touch screen, tap the **EFM Mobile App** icon.
   The **Welcome to EFM Mobile** screen appears.

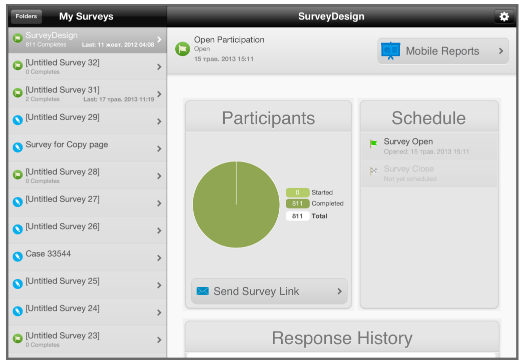


iPad EFM Mobile Login screen

2. Enter the following required information:
   - **User Name** – The name that you use to log in to the EFM application.
   - **Password** – The password that you use to log in to the EFM application.
   - **EFM application URL** – The URL where EFM is located.
   - Tap **Login**.
     The **My Surveys** page appears.

My Surveys page

The **My Surveys** page provides access to your surveys (including SMS surveys), folders, and settings. Select a survey in the list of surveys. You can also view the surveys that are shared with you. Go to the **Folders** > **Shared Surveys** folder.



iPad Mobile > My Surveys page

Procedure

1 In the **My Surveys** list, select a survey.
The survey information screen appears.

2 On the survey information screen, you have access to:

- **Participant Status** – View the number of participants who started and completed your survey and the total number of participants. The **Over Quota** and **Branched Out** statuses appear only if there are any data for over quota and branched out.
- **Response History** – Display the chart view of the response history.
- **Send Survey Link** – Email your survey link and invitation to one of your contacts.
- **Mobile Report** – View the mobile report for each of your survey questions. You have the ability to page through each question using the arrows, or tap the button in the middle to display the list of all questions. In the list of questions you can tap and display responses for that question.

To display the **Settings** screen, change your workgroup, or log out of the EFM Mobile Application, tap the **Settings** icon .

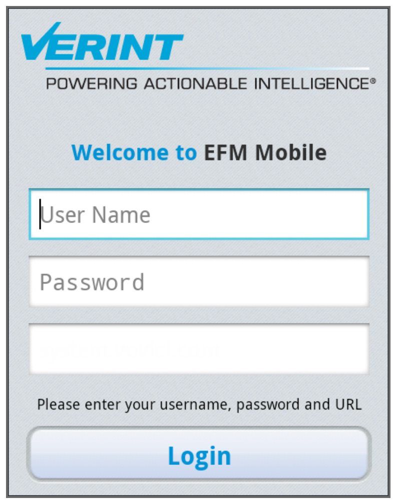
EFM Mobile apps–Android

Install the EFM Mobile Android app

1. Go to the EFM Mobile app for the Android.
2. Download the application.
   You can also download from the Android Marketplace.

Log in to EFM Mobile (Android)

1. On the Android touch screen, tap the **EFM Mobile App** icon.
   The **Welcome to EFM Mobile** screen appears.



Android EFM Mobile Login screen

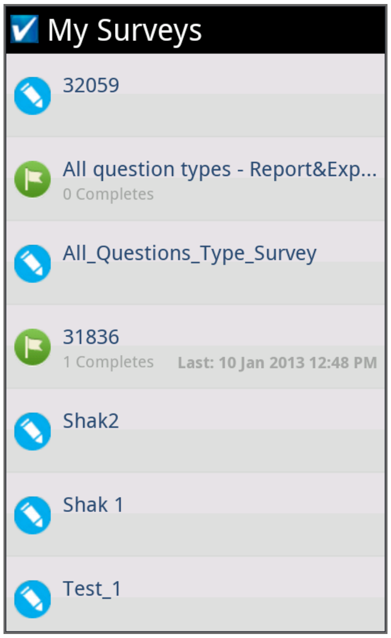
2. Enter the following required information:
   - **User Name** – The name that you use to log in to the EFM application.
   - **Password** – The password that you use to log in to the EFM application.
   - **EFM application URL** – The URL where EFM is located.
   - Tap **Login**.
     The **My Surveys** page appears.

My Surveys page

The **My Surveys** page provides access to your surveys, folders, and settings. Select a survey from your list of surveys. You can also tap the menu button, and then on the **My Surveys** page, click **Search** > enter the survey name.

The SMS survey support will be added in the future release.

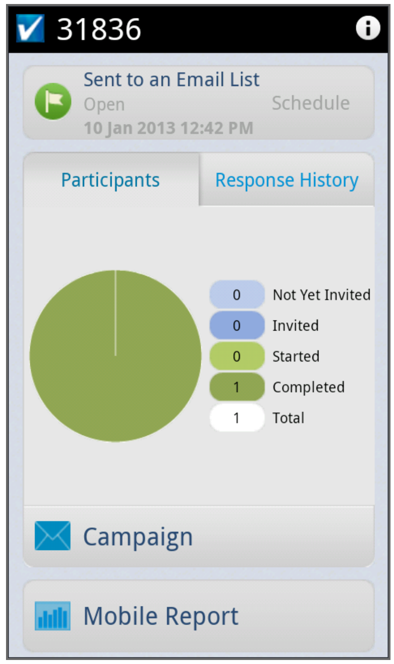
You can also view the surveys that are shared with you. Tap the menu button, and then go to the **Folders** > **Shared Surveys** folder.



Android Mobile > My Surveys page

Procedure

1 In the **My Surveys** list, select a survey.
The survey information screen appears.



Survey information screen

2 On the survey information screen, you have access to:

- **Participant Status** – View the number of participants who started and completed your survey and the total number of participants.
- **Response History** – Display the chart view of the response history.
- **Send Survey Link** – Email your survey link and invitation to one of your contacts.
- **Mobile Report** – View the mobile report for each of your survey questions. You have the ability to page through each question using the arrows, or tap the button in the middle to display the list of all questions. In the list of questions you can tap and display responses for that question.

To display the **Settings** screen, change your workgroup, or log out of the EFM Mobile Application, tap the **Settings** icon .

Offline Device

Topics

Offline Mobile–Guided Access mode

Navigation

Start **EFM Offline Mobile** on your mobile device.

You can deploy surveys using the Offline Mobile app in the **Guided Access** mode to survey in a retail environment like a bank and lock down access to the rest of iOS and management aspects of Offline Mobile app. Guided Access keeps the device in a single application and allows you to control which features are available. In Guided Access mode, the close button and the survey details button are not visible.

Enable Guided Access mode

Procedure

1. Go to **Settings** > **General** > **Accessibility** > **Guided Access**.
2. Turn **Guided Access** mode on.
3. Set the passcode that is used when **Guided Access** is enabled.
4. To display the accessibility shortcut settings in the **Guided Access** mode, turn **Accessibility Shortcut** on.

Set Kiosk Time-Out

Procedure

1. Click **About**.
2. Press the plus or minus sign to increase or decrease the time-out.

Conduct survey in Guided Access mode

Procedure

1. Triple-click the **Home** button to start Guided Access.
2. Click the **Launch Survey** button.
3. Collect responses.

> Click the **Need More Time** button if respondents need more time to answer the questions. Otherwise, the survey starts again when the countdown reaches zero.

4. Click the **Start Over** button to start a new survey.

Exit Guided Access

Procedure

1. Triple-click the **Home** button.

2. Enter the passcode.
3. Click **End** in the upper-left corner.

Offline Device–Role-based access

Navigation

Administration tab > **Roles** tab.

The group and survey administrators can control the workgroup members' access to authorize surveys for distribution to the offline mobile devices based on the user role set of permissions. You can enable the Send to Offline Device functionality for a user by creating a new role or editing the existing ones.

> This option is available only if you have a license for the Mobile Offline Survey Taking feature.

By default, the Send to Offline Device functionality is active for all users that have access to open a survey.

When the offline mobile survey taking is disabled, you can see neither the **Devices** tab on the **Administration** tab nor the **Send to Device** button in the **Collect** view.

Activate Offline Mobile for a user role

Procedure

1. Go to **Administration** tab > **Roles** tab.
2. Click the name of the role that you want to edit.
   The **Edit Role** page opens.
3. On the **Edit Role** page, in the **Surveys** section, select the **Send to Offline Device** check box.
4. Click **Save**.

> For details on the user roles, see Roles, page 1378.

Manage Offline Access

Navigation

Design & Collect tab > **Surveys** tab > create a new survey or select an existing one > **Collect** view > select any distribution type except for **Require a Passcode** > **Overview** dashboard > add the Offline Device campaign for your survey > **Offline Devices** tab > **Manage Offline Access** page.

You can add, remove, import, and search for the devices of the EFM Offline Mobile users by using the **Manage Offline Access** page functionality.

After registering a mobile device on the **Administration** page, you can send a survey to it, and then respond to it in the offline mode from your device.

> This topic refers to EFM Offline Mobile App that can be installed on iPhone, iPad, and iPod Touch. Do not confuse it with EFM Offline Mobile (PC edition), for details, see Export a survey to EFM Offline Mobile (PC edition), page 187.

The **Manage Offline Access** page is only available after you add the Offline Device campaign to your survey on the **Overview** dashboard by clicking the **Add Campaign** menu.

> If your survey is already distributed via **Require a Passcode** method, you cannot add any other campaigns to it including **Offline Device** campaign.

After this, the **Offline Devices** tab appears on the **Collect** tab. Click the **Collect** tab to open the **Manage Offline Access** page.

After adding the **Offline Device** campaign, you can add devices to your survey in one of the following ways:

- By clicking options on the menu:
  - **Add Device** – Select the device to which send your survey. You can select any device that is registered on the **Administration** tab (see Register a Device, page 1388 and Send a survey to the device, page 1471).
  - **Import Devices from Survey** – Select the survey from which to import devices.
- By clicking the toolbar options on **Offline Devices** > **Manage Offline Access**:
  - **Actions** – Import devices from another survey into the current survey (see Import a device from another survey, page 1470).
  - **Add** – Select the device to which to send your survey. You can select any device that is registered on the **Administration** tab (see Send a survey to the device, page 1471).

All the added devices are displayed in the **Manage Offline Access** grid.

To manage the added devices, you can also use the following options on the toolbar:

- **Remove** – Stop survey sharing with the previously added device (see Stop sharing survey with the device, page 1472).
- **Search** – Search for the device by typing its ID, description, or tags in the **Search** box.

In the **Manage Offline Access** grid, you can find the following information about each device that is added to your survey:

- **Device ID** – The ID of the registered device.
- **Description** – A brief description of the registered device.

- **Tags** – Custom user information (for example, a group name). It is limited to 255 characters.

By default, the **Manage Offline Access** grid displays the first 10 devices. To view more devices per page, click **25**, **50**, or **100** to the right of the **View per Page** option at the bottom of the **Manage Offline Access** grid. You can also sort devices by clicking the column heading. To change the width of a column, drag its edge.

In addition, if the **Manage Offline Access** grid is longer than one page in length, you can navigate through pages by clicking the page navigation arrows.

Import a device from another survey

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or select an existing one > **Collect** view > select any distribution type except for **Reguire a Passcode** > **Overview** dashboard > **Add Campaign** menu > add the **Offline Device** campaign to the survey.

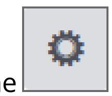
You can import devices from another survey, and then send your survey to the imported devices to respond to it in offline mode.

Procedure

1 Go to the **Collect** tab of the survey that you want to send to a mobile device.

Make sure that your survey is not distributed via **Require a Passcode** method.

2 On the **Overview** dashboard, on the **Add Campaign** menu, add the **Offline Device** campaign.

3 On the created **Offline Devices** widget, on the  menu, click **Import Devices from Survey**.

Or

Go to the **Offline Devices** > **Manage Offline Access**, and then on the **Actions** menu, click **Import Devices from another survey**.

4 In the **Import from Survey** dialog box, select a survey that you want to import devices from, and then click **OK**.

You can select only one survey at a time.

5 Click **Import**.

When importing is completed, you can view the number of imported devices and the number of devices that failed to import.

6 Click **Close**.

The imported devices appear on the **Manage Offline Access** page.

Send a survey to the device

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or select an existing one > **Collect** view > select any distribution type except for **Reguire a Passcode** > **Overview** dashboard > **Add Campaign** menu > add the **Offline Device** campaign to the survey.

You can send a survey to a mobile device, and then respond to it in the offline mode from your device. You can select any device that is registered on the **Administration** tab (see Register a Device, page 1388).

> If a survey contains **Hierarchical** questions, **Image Upload** questions, or has the **Web Service Event Handler** functionality configured, you cannot send it to mobile devices and respond to it in offline mode.

Procedure

1 Go to the **Collect** tab of the survey that you want to send to a mobile device.

2 On the **Overview** dashboard, on the **Add Campaign** menu, add the **Offline Device** campaign.

3 On the created **Offline Devices** widget, on the menu, click **Add Device**.

Or

Go to the **Offline Devices** > **Manage Offline Access**, and then click **Add** on the toolbar.

4 In the **Add Device** dialog box, to the right of the **Find Using** option, specify how you want to search for the devices by selecting the corresponding option:

- **Description or Device ID**
- **Tags**

5 In the text box, type the device information.

6 Click **Search**.

The results of the search appear in the **Devices Found** grid.

> You can navigate through the pages in the dialog box by clicking the page navigation arrows.

7 Select the check box next to the device that you want to use for the survey distribution.

8 Click **Add Device**.

The survey is sent to the selected device, and the device appears in the **Manage Offline Access** grid.

> If your survey is shared with any offline device, a corresponding notification appears on the **Collect** tab under the survey status.

Stop sharing survey with the device

Navigation

Design & Collect tab > **Surveys** tab > **My Surveys** page > create a new survey or select an existing one > **Collect** view > select any distribution type except for **Reguire a Passcode** > **Overview** dashboard > **Add Campaign** menu > add the **Offline Device** campaign to the survey.

You can stop sharing your survey with the mobile device to which you sent it.

Procedure

1. On the **Collect** tab, click the **Offline Devices** tab.
2. On the **Manage Offline Access** page, select the check box next to the device that you want to stop sharing the survey with.
3. On the toolbar, click the **Remove** button.
4. In the confirmation dialog box, click **Remove**.

The device is removed from the survey distribution.

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