



Qualpha Solutions Survey System User Manual

Creating, editing, publishing
surveys and reviewing results

Qualpha Solutions

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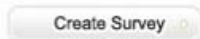
1. Logging in to the system:

Enter the appropriate path into the URL bar of your web browser (or follow the link given by your systems administrator).

Enter your username (email address format) and password

2. Creating/Editing a survey (Survey creation is only applicable to users with rights to create surveys)

Step 1: Click 'Create Survey' or select an existing survey for editing and skip to Step 5.



Step 2: Enter the Survey Name, default username and password to manage this survey. The user entered here will have rights to control, add or edit questions or create further editors of this survey. It would usually be the user who created the survey but this is not essential.

Survey Name

Enter name of survey. This is the name that people will see so they can be told apart. Use a descriptive name such as

Default Username and Password

You must create a default user that will have permissions Edit Survey pages.

Username:

Password:

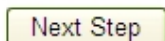
Step 3: Select whether to create a completely new survey or copy from an existing survey.

Copy Survey

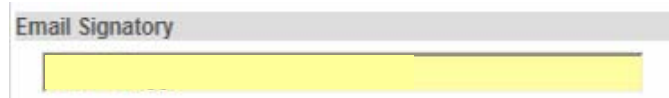
To copy an existing survey, choose it from the list below. Only public surveys can be copied. If you choose to copy a survey, all messages, demographics, and questions will be loaded from the existing survey and then you can go through and edit it to your liking.

None - Start with blank survey

Step 4: Click 'Next Step'.



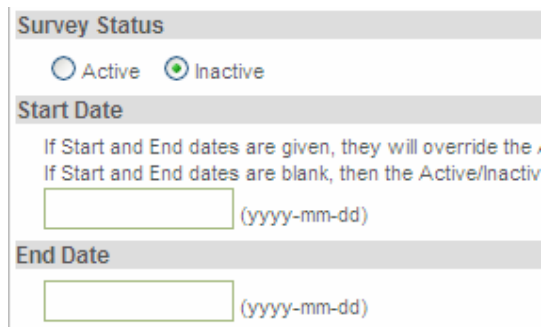
Step 5[Optional]: Enter the name of the person from whom the invitation email will be sent



Step 6: upload the school logo.



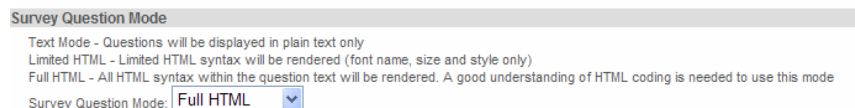
Step 7: Set the Survey Status to be active **or** enter the start + end date for the survey.



Step 8: Select the survey template (currently only the default template is available)



Step 9: Select Survey question mode



This enables formatting of question text, e.g. font size, font style, bold, underline etc..

Text mode = no formatting of question text

Limited HTML = limited HTML tags accepted (font name, size and style only)

Full HTML = all HTML tags accepted (great care need if applying images etc.)

Note: An understanding of HTML coding is needed to use this function.

Step 10[Optional]: Enter the URL of the site to which the respondent will be redirected after the survey is completed.

Completion Redirect Page

This is the page respondents will be sent to after they complete the survey.

- Main Survey Page (*index.php*)
- Survey Results Page (*Results Access should be Public*)
- Custom URL

URL:

Step 11: Enter the subject line and the text of the invitation email to respondents. The email should include the URL link for accessing the survey – it will appear as <<Survey_URL>> (i.e. the variable Survey URL enclosed by the shown symbols. When the email is sent, the link will automatically include a unique code for the respondent.

The screenshot shows the 'Invitation Email Template' configuration window. It has two main sections: 'Subject' and 'Contents'. The 'Subject' field is empty. The 'Contents' field contains HTML code: `<html><body>`, `<div>`, `Dear Parent,

`, and `As part of our efforts to build on our strengths and to further improve, we are introducing an annual survey for`. To the right of the 'Contents' field is a legend titled 'Click on the links below to insert the variables into Email contents:'. The legend lists several variables: `<<Survey_Name>>` (Name of the Survey), `<<User_Code>>` (Invitation Code of the Protected Survey), `<<Survey_URL>>` (Direct Link for accessing the survey), `<<Email_Signatory>>` (Signature), `<<Username>>` (username), `<<password>>` (password), and `
` (line break between contents).

Note: The Reminder Email Template (situated below the invitation email) is setup in the same way.

Step 12: Click 'Save Changes' to save the properties.

Step 13: Click 'Edit Questions' to edit or add questions.

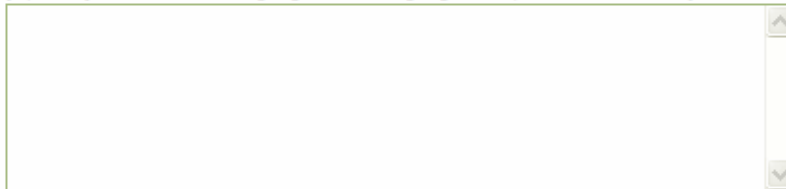
Step 14: Enter the Question in the text area. (HTML tags may be used for formatting depending on the mode selected in Step 9.)

Enter the question text or [%PAGE BREAK%](#) in order to create a page break in your survey (answer type will be ignored).

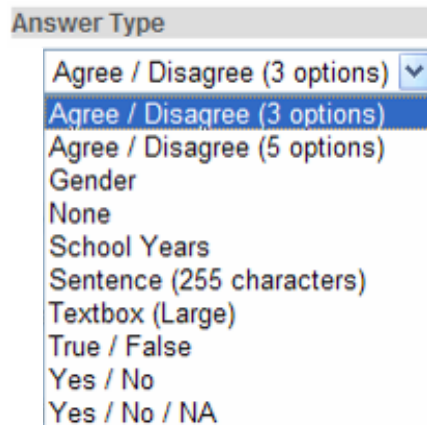


Step 15[Optional]: Enter the 2nd Language if dual language is required for the survey

[Optional] Enter the 2nd Language if dual language is required for the survey.



Step 16: Choose the answer type from the drop down list.

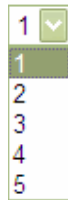


Answer Type

- Agree / Disagree (3 options)
- Agree / Disagree (5 options)
- Gender
- None
- School Years
- Sentence (255 characters)
- Textbox (Large)
- True / False
- Yes / No
- Yes / No / NA

Step 17: Choose the number of answer blocks from the drop down list.

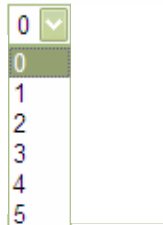
Number of Answer Blocks



A dropdown menu with a grey header 'Number of Answer Blocks'. The current selection is '1'. The menu is open, showing options: 1 (highlighted), 2, 3, 4, and 5.

Step 18: Choose the number of required answers from the drop down list

Required Answers



A dropdown menu with a grey header 'Required Answers'. The current selection is '0'. The menu is open, showing options: 0 (highlighted), 1, 2, 3, 4, and 5.

Step 19[Optional]: Choose the position of the question.

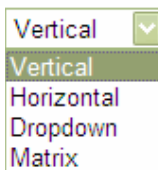
Insert After Number



A dropdown menu with a grey header 'Insert After Number'. The current selection is '1'. The menu is open, showing options: 1 (highlighted), First, and 1.

Step 20[Optional]: Choose the orientation of the answers, e.g. vertical or horizontal

Orientation



A dropdown menu with a grey header 'Orientation'. The current selection is 'Vertical'. The menu is open, showing options: Vertical (highlighted), Vertical, Horizontal, Dropdown, and Matrix.

Step 21: Click 'Save This Question' save the question

Save This Question

Step 22[Optional]: Click 'Preview Survey' to preview how it looks.

Preview Survey

3. Publishing the survey and allowing respondents access to it:

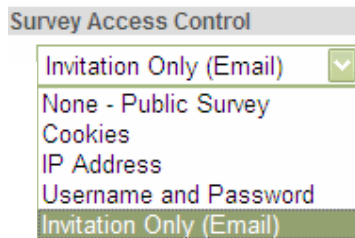
Step 1: Click 'Edit Properties' to check that the survey status is set to 'Active'



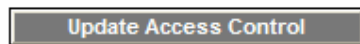
Step 2: Click 'Access Control' to edit the survey respondent list or set the survey type



Step 3: Choose the survey type from the 'Survey Access Control' drop down list. Available options include *Public*, *Cookies*, *IP Address*, *Username and Password* and *Invitation only (Email)*. *Public* and *Invitation Only* are the most commonly used



Step 4: Click 'Update Access Control' to update the changes



Step 5 [Optional]: Add/edit users who will have rights to edit the survey and/or view results.

Users and Editors						
Name	Email	Username	Password	View Results	Edit Survey	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 6: Search Respondents [Optional]



Enter email address and on clicking <Search> the status of that respondent will be displayed.

Step 7: Load Respondents



Choosing all, or a respondent group, will display the selection.

Step 8: Filter Repondents

Filter Respondents
status:

Choosing 'Uninvited' displays the list of those who have not yet been sent an invitation email. To display all respondents use the function in 7 above

9. Entering Respondent Details

Name	Email	Respondent Group	Invited	Invite Code	Completed	View Results	Action
Uncheck All							
<input type="text"/>	xyz@xyz.com	G1	2008-06-04 00:34	ap7wsrUbWY	(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="text"/>	abc@abc.com	G2	N		(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>			(-)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Total # of Respondents : 2							

(Be sure to save Respondents before sending invite codes.)
Do Not Click The go Button More Than Once.This could take a few minutes, please do not exit this page until all emails are sent

Action:

Upload Respondents

Upload respondents:

[Download Respondent Template here](#)

*csv format:name,email,Respondent_group
name:Respondent's Name (not required for anonymous survey)
email:Respondent's Email (required)
Respondent_group:Respondent's Group (required)
Note:Maximum of 200 respondents should be assigned per group

[Import Respondents](#)

Enter the respondent's name (not mandatory) and email address and assign the respondent to a group. Group assignment is very useful when sending out emails and is recommended if there is a large number. Group names are user definable and the recommended maximum is 200. The system will handle much larger numbers but the dispatch time may be slower.

Alternatively, to upload respondents from a file, click the "Import Respondent" link (see next). A template can be downloaded to show the necessary format of the import file.

10. Import Respondents

Enter the path and file name of the import file (Use the downloadable template to ensure the correct column headings)

N.B THE IMPORT FILE MUST BE IN CSV FORMAT

Online Survey Tool

Invitee Import

Source file for invitee import (CSV only):

Auto-Assign Group

To automatically assign invitees to groups, check the Auto-Assign Group box. The group size will be a maximum of 50 invitees. (If any respondents are already assigned to groups in the import file, they will be reassigned if this option is selected).

Click <Import Now> to upload the invitee list

Step 11: Action items for the respondent list

Action:

The following actions may be performed on the respondent list – only those with the ‘Action’ box checked will be affected. Click <go> to carry out the action.

Save selected respondent – must be actioned after any change to items in the list or after an upload

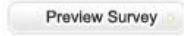
Delete selected respondents – to remove selected respondents from the list (Note: if a respondents email address is removed after the invitation they will not be able to complete the survey. However, if the address is removed after the respondent has completed the survey, the results will still stand)

Send invitation email to selected respondents – the invitation email is sent to all the selected respondents. (Note: although the survey system can handle a large number of email invitations in one batch, it is advisable to send in groups of about 200. Please wait until the confirmation page is returned before closing the browser)

Send reminder email to selected respondents – as above but the reminder email is sent (Note: reminder emails are sent only to those who have not yet completed the survey)
Move selected to users list – this can be used to make a respondent an editor of the survey.

4. Viewing and Exporting Results:

Step 1: Click 'View Results' to go to the results page



Step 2: Click the 'Pie Chart' link to view the results in Pie Chart format. Only non-text type answers can be displayed in the Pie Chart view

[Pie Chart Results](#)

Step 3: Click the *Column Chart* link to view the results in Column Chart format. Only non-text type answers can be displayed in the Column Chart view

[Column Chart Results](#)

Step 4: Click the *Friendly Print* link for a printable version of the report.

[Print Friendly](#)

Step 5: Click 'Export->Text' or Export>Numbers (depending on whether text or numerical data is required) to export data for further analysis in Excel or other programs.



5. Administrative Functions:

Edit Properties

Properties of the Survey System

- *Survey Name*: Name of the Survey
- *Principal Name*: Name of the School Principal or signatory of the invitation email
- *Survey Logo*: Upload the school logo which will be displayed at the top of the survey
- *Survey Status*: Set the survey to be Active/Inactive
- *Start Date*: Start Date of the Survey to become active
- *End Date*: End Date of the Survey to become inactive
- *Survey Template*: default template
- *Survey Question Mode*: Allow HTML tags in questions
- *Completion Redirect Page*: Redirect user to a 'Thank you' page or other page/site.
- *Results Date Format*: Format of the date on result page
- *Time Limit*: Limit the time a respondent can spend on the survey (0 = indefinite)
- *Clear Results*: Clear the survey results data but keep the questions(recycling) (caution: cannot be undone)
- *Delete Survey*: Delete the current survey (caution: cannot be undone)
- *Email Template*: Text of email to be sent to respondents (use HTML tags)

Edit Questions

Setting up and editing questions

- *Delete*: Delete the selected question
- *Edit*: Edit the selected question
- *Move Up*: Move the question up to a new position
- *Move Down*: Move the question down to a new position
- *Add a new question*: Create a new question
- *Optional question text*: Alternative language for the question
- *Answer Type*: Select the answer type: e.g. Yes/No/Options/Text
- *Number of Answer Blocks*: Number of answer blocks required for the question (usually 1 block)
- *Required Answers*: Select how many answers choices are mandatory for this question. Choose 0 for Non-Question Type text (for example, a welcome or thank you message)
- *Insert After Number*: Insert the new question after question X
- *Orientation*: Direction of the answers, either vertical or horizontal
- *Dependencies*: Skip Logic, it controls which question to jump to after a respondent selects an answer for a question (maximum of 3 logics supported)

New Answer Type

Creating Answer Types

- *Answer Name*: Name of the answer, for instance Gender, Agree and Disagree etc.
- *Label*: Label to be displayed with the answer
- *Answer Type*: For example, Multiple choice, Text etc.

Edit Answer Type

Edit the existing answer type

Access Control

Controlling who accesses the survey

- *Survey Access Control*: Choose Type of Survey: Public, Private, Password protected etc.
- *Hide Survey*: Hide the survey
- *Public Survey Results*: Control whether the results can be viewed by respondents.
- *Survey Limit*: Control the # of times respondent can take the survey
- *Reset Completed Surveys*: Reset the # of times respondent has taken the survey to allow the respondent to re-take the survey
- *Users*: Add or Edit users who can edit the survey or view results.
- *Respondents*: List of Respondents including their email and key (system generated). This option will only show up if the survey is 'email invitation' only type
- *Import Respondent*: Import respondents details using a CSV file

Preview Survey

- Preview the look of the current survey.

Main Panel

- Return to the default home page, which lists the available surveys and allows the creation of new ones (if the user has appropriate permissions).

View Results

- View survey results.

Admin

This is for the use of users with an administrative account – see the Administrators Supplementary Guide.