Survey Manager *lite* 4.2

internet marketing

WEB ACCESSIBILITY W3C INIATIVE COMPLIANT

SEARCH ENGINE SEO OPTIMIZATION FRIENDLY

Table of Contents

Thank you for choosing the Survey Manager Lite v4.2!

Create, manage, and run online surveys easily and effectively with the next generation of the Survey Manager Lite! Version 4.2 lets you create a full-powered survey management service that features a familiar and consistent user interface, an easy-to-use **Administration Panel** that uses the best elements of our suite of products, and a hybrid system that allows you to configure surveys as quizzes, complete with printable summary reports and a flexible scoring system.

Created in ASP.NET and built on the Microsoft SQL Server platform, the Survey Manager Lite v4.2 is a powerful information-gathering solution that offers a wide range of out-of-the-box features, and is nimble and flexible enough to be up and running in no time, avoiding the costly development process.

Provide your site visitors and customers with a service that allows them to provide feedback, request for information, and give you access to their demographic information at a click of a button! As a **Site Administrator**, you can easily manage the Survey Manager Lite's survey, question, feedback option, admin user, participant and general module settings through the **Administration Panel**, which has an integrated **Web Content Editor** (WCE), a powerful web-authoring tool that lets you manage the content of your web pages in a dynamic, WYSIWYG method.

The Survey Manager Lite v4.2 comes with full system maintenance and is easy to configure. It has multi-question and multi-feedback option capabilities, as well enhanced export functions that allow you to save participant and survey databases into your local computer. The Survey Manager Lite's scalable and fully customizable interface ensures that you will have a reliable platform for your business' future growth and development.

What's new in Survey Manager Lite v4.2?

Global Login

Survey Manager now uses the global site login. Front-end users are no longer required to login separately to take a survey.

Anonymous Surveys

A **Public System** option has been added to the **Configuration** page. If checked, users are not required to login to take a survey.

User Groups Added

A **Group** option has been added to the right-hand **Main Menu**. Groups can be created and users can be assigned to groups. Groups can be assigned a limited number of accessible surveys and permissions. The **Survey Participants** option has been modified to give the administrator the ability to set similar survey permissions for individual users.

Groups created with Document Manager can be imported via a new **Synch** option in the **Configuration** page.

SEO Fields Added to the Survey Details

Survey Detail pages now support expanded SEO data. You may enter a title, keywords, an SEO descriptions, and customize the final portion of the URL.

Expanded Reporting

The **Reports** page has been expanded to create reports based on filters. You can display reports that match programmed criteria. Search results can be saved and later accessed under a new right-hand Main Menu option called **Saved Search Results**.

Section 1: The Survey Manager Lite Front-end Interface

The Survey Manager Lite Login Page

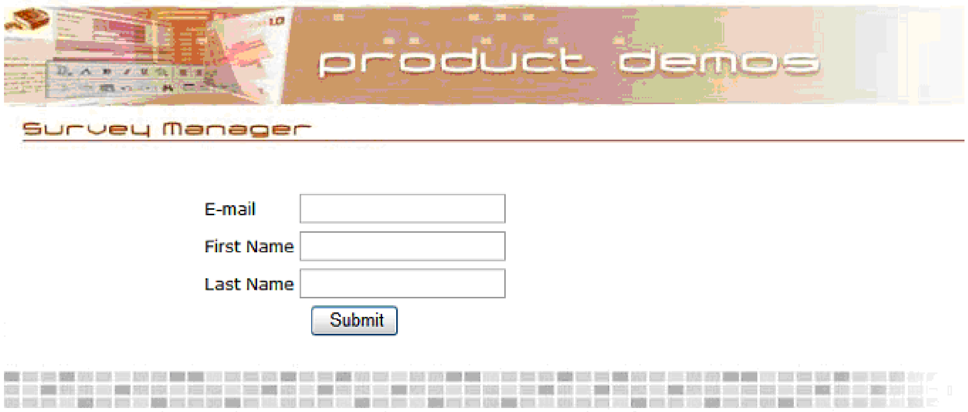


Figure 1-1 Login Page

The Survey Manager Lite v4.2 **Login Page** (Figure 1-1) provides an easy-to-use interface for your site visitors to login to the Survey Manager Lite module. If Survey Manager is not setup for public use, users are required to enter a valid E-Mail Address and their first and last name in order to access the Survey Manager Lite.

The Survey List Page

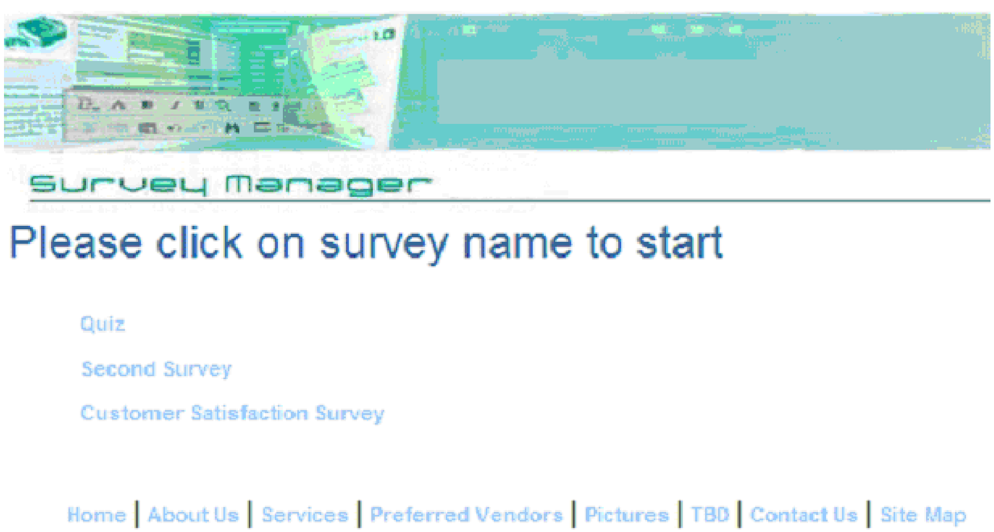


Figure 1-2 Survey List Page

A successful login brings the user to the **Survey List Page** (Figure 1-2), providing them with links to all available surveys within the Survey Manager Lite. Clicking on a **Survey Name** link directs the user to the **Main Survey Page** (Figure 1-3) of the survey they have selected.

The Main Survey Pages

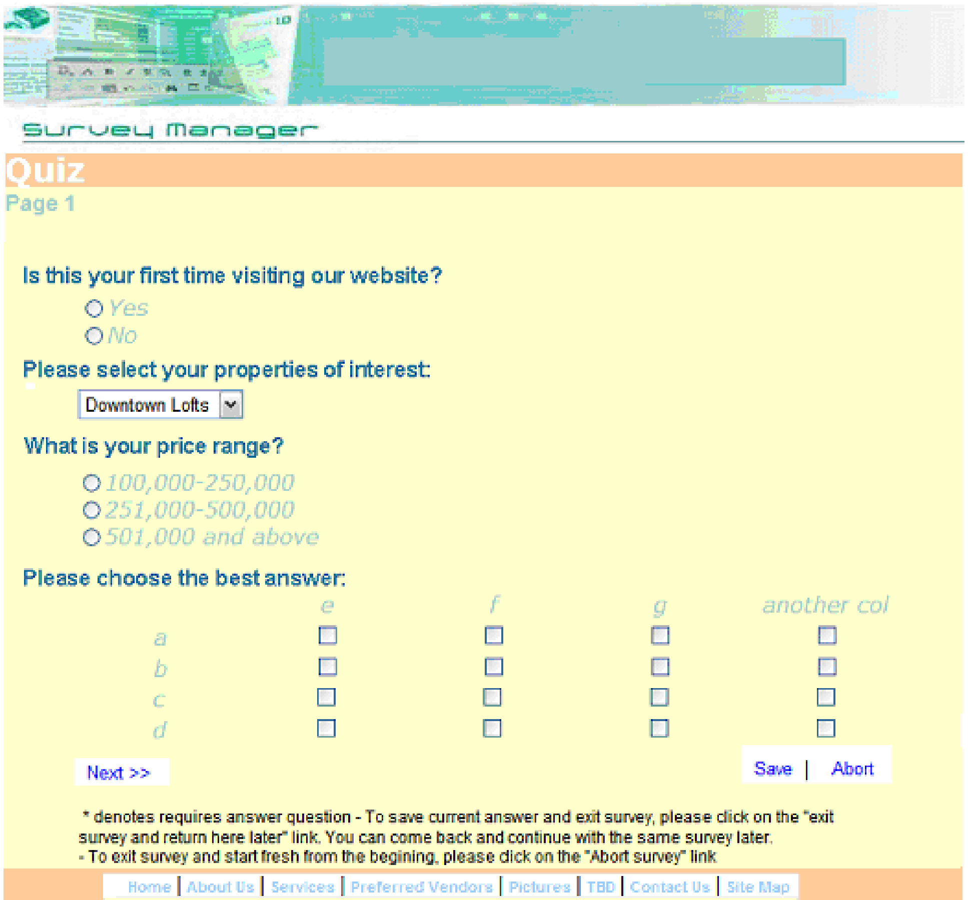


Figure 1-3 Main Survey Page

The **Main Survey Pages** (Figure 1-3) contain survey questions to be answered by the survey participant. Each question can be configured to contain a number of feedback options - text, text area, checkbox, radio, selection, matrix-checkbox, and matrix-radio responses. These feedback option types can limit or widen the potential answers of each survey participant and is easily configurable in the **Feedback Options page** (Figure 7-3).

Within any of the **Survey Main Pages**, a survey participant can abort or save the current survey at any time. Clicking on the **Save** link automatically saves the survey and all answered survey questions. Once the survey participant logs in again, they can go back and complete the rest of the survey. Clicking on the **Abort** link brings up a pop-up window requesting confirmation to abort the survey. Clicking **OK** will abort the survey and no records will be saved.

The Finish Survey Page

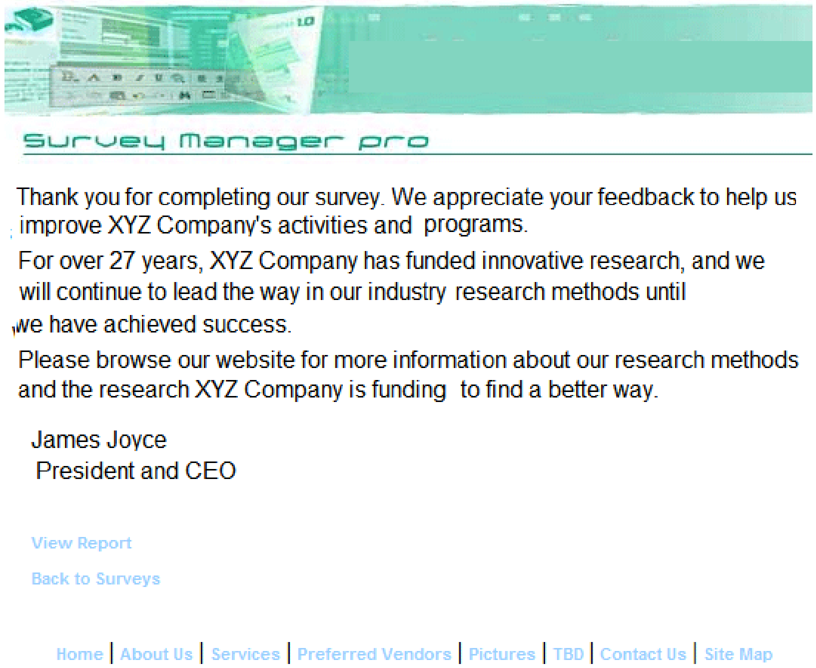


Figure 1-4 Finish Survey Page

After a survey participant has completed the survey, the **Finish Survey Page** (Figure 1-4) will be displayed, providing confirmation that the survey is completed. As a Site Administrator, you can configure the contents of the **Finish Survey Page** within the **Configuration page** (Figure 2-1).

Within the **Finish Survey Page**, survey participants can access a summary report of the survey the have just completed by clicking the **View Report** link. They can also go back to the **Survey List Page** by clicking the **Back to Surveys** link.

The Survey Report Page

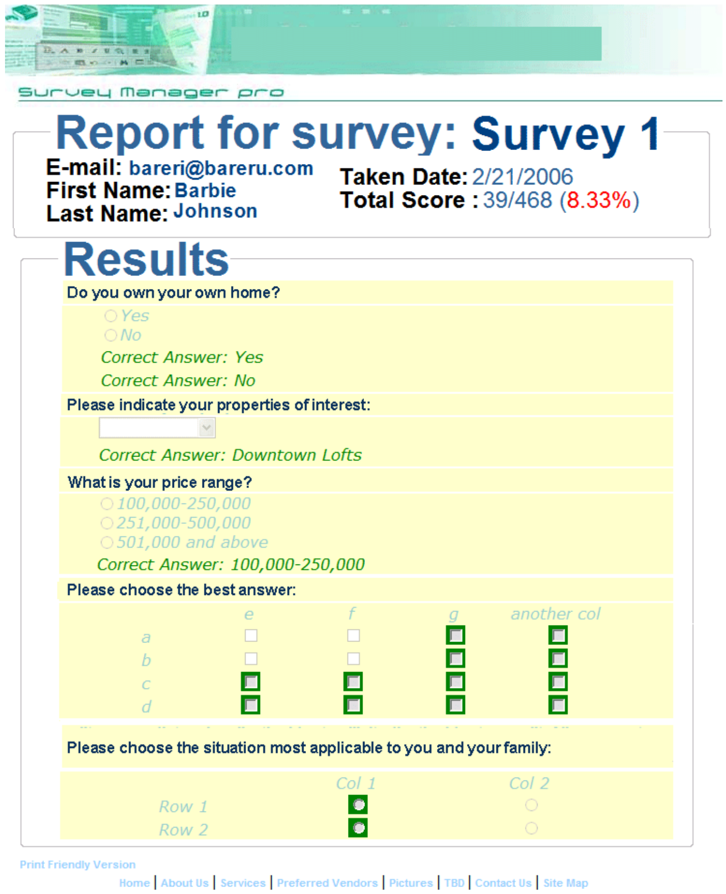


Figure 1-5 Survey Report Page

The **Survey Report Page** (Figure 1-5) provides a list of all survey questions and the survey participant's chosen answer(s) for each question. If the survey has been configured as a quiz, the **Survey Report Page** also indicates a **Total Score** and indicates the correct answer(s) for each question. You can easily configure your survey to be a quiz within the **Survey page** (Figure 5-1).

To print the **Survey Report Page**, the survey participant clicks on the **Print Friendly Version** link. The page will be reloaded in a new window and they can print the page by using their browser's **Print** function (In Internet Explorer, click **CTRL + P** or click on the **Print** icon).

Section 2: Configuring General Settings

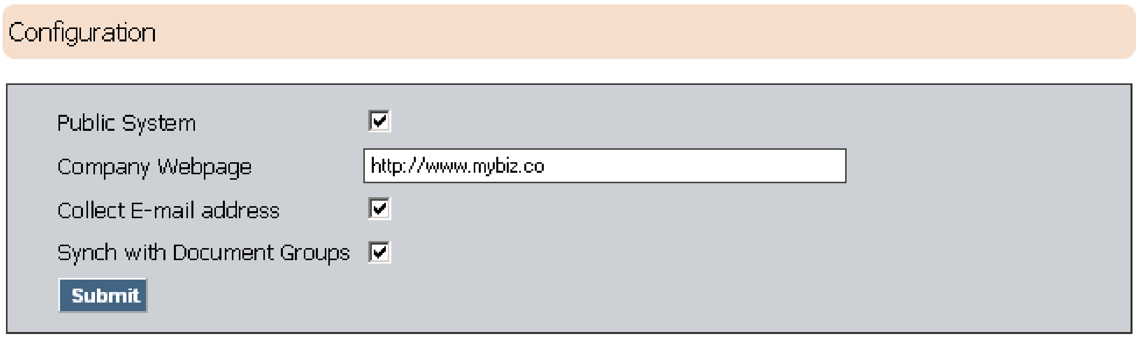


Figure 2-1 Configuration page

The **Configuration page** (Figure 2-1) allows you, the **Site Administrator**, to manage general module settings as well as customize a message for participants who have finished a survey.

Public System

If you check the **Public System** option, users can take surveys without need to login.

Company Webpage

Enter your web address in the **Company Webpage** field.

E-Mail Address Collection

Check the **Collect E-Mail Address** checkbox to require potential survey participants to enter an E-Mail address to access the survey system.

Synch with Document Groups

Survey Manger can use the same group structure you might have set up in Document Manager. If you would like to import the group structure already set up in Document Manager, click this option. Groups will be imported when you click the **Submit** button.

After you have configured general settings for the Survey Manager Lite, click the **Submit** button. The message **Info Updated Successfully** will be displayed. Refresh the browser page displaying the Front-end Survey Manager Lite interface or click **Back To Main Menu**. The selected settings will have taken effect.

Section 3: Managing User Groups

After you have configured general module settings, you can now create user groups as a means of organizing users into multiple user types. Members of a group can have specific access rights assigned, specifying which surveys they can have access to.

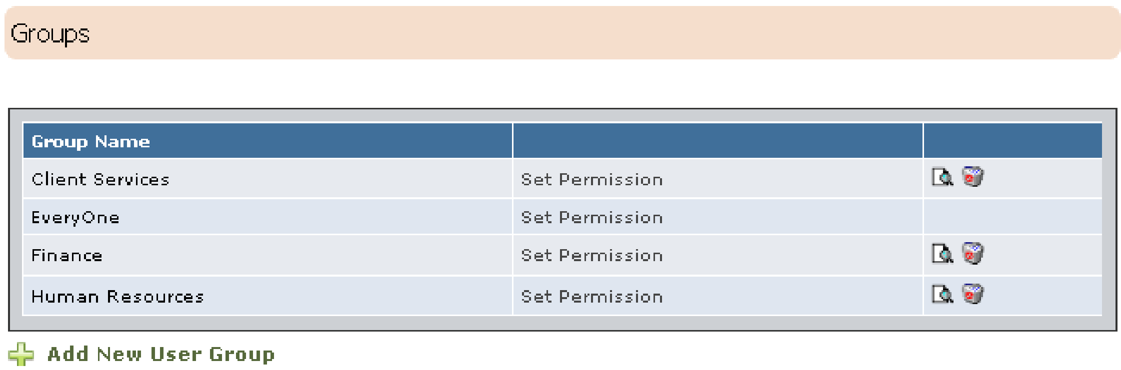


Figure 3-1 User Groups page

The **User Groups page** (Figure 3-1) displays the **User Group List**.

Adding a New User Group

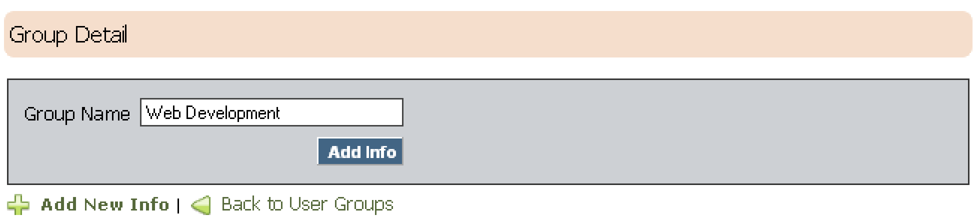


Figure 3-2 Group Detail Page

1) Select **Groups** from the right-hand **Main Menu**.
2) Click **Add New User Group**. The **Group Detail Page** will open (Figure 3-2).
3) Enter a user group name in the **Group Name** field.
4) Click the **Add Info** button to save your changes.

Editing a User Group Entry

1) Select **Groups** from the right-hand **Main Menu**.
2) To delete, find the user group name in the **Group List** and click the **Delete** icon assigned to it. A confirmation window will appear.
3) To edit, click on the Magnifying Glass icon assigned to the user group. This opens the **Group Detail Page** (Figure 3-2).
4) Edit the group name field, and click the **Update Info** button to save your changes.

Allowing Public Access

The **Everyone User Group** is a special group that allows the **Site Administrator** to give user access to surveys without a login and password. Give this group permission to access general surveys that you would like to be accessed by all website visitors.

Configuring User Group Permissions

After creating a user group, you can assign survey and group permissions to the user group through the **Permissions Page**.

1) From the **Main Menu**, click **Groups**. The **Groups page** appears (Figure 3-1).

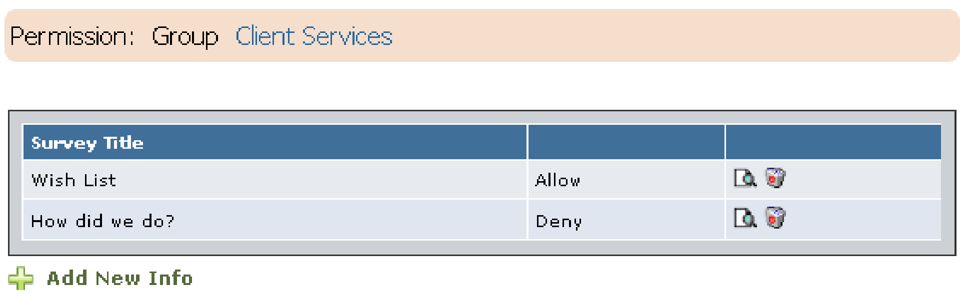


Figure 3-3 Group Permissions page

2) Find the group name from the **User Group List** and click the **Set Permissions** link assigned to it. The **Group Permissions** page (Figure 3-3) for the selected user group appears.

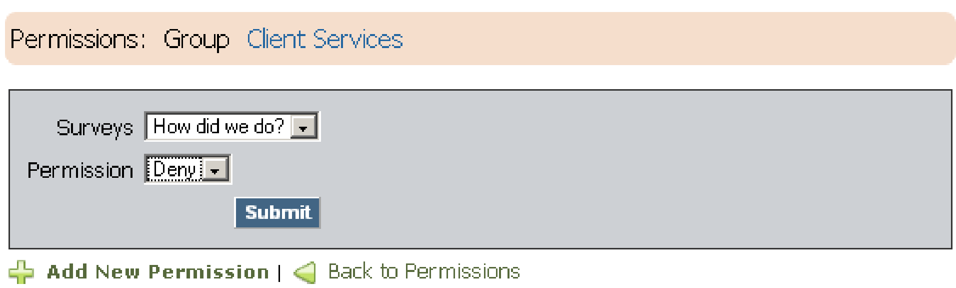


Figure 3-4 Permissions Detail page

3) Click **Add New Permission**. The **Permissions Detail** page (Figure 3-4) appears.

4) Select a survey from the **Surveys** drop-down list.

5) Select a permission level from the **Permission** drop-down menu. (Please see the table below for **Permission Level** details).

Detail	Description
Allow	Allows user groups to take the survey and view results.
Deny	Explicitly disallows user groups from taking a survey or viewing results.

6) Click the **Submit** button to save your changes.

Editing User Group Permissions

1) Find the group name from the **User Group List** and click the **Permissions** link assigned to it. The **Group Permissions Page** (Figure 3-3) for the selected user group will open.
2) Find the survey permission you would like to edit from the **Group Permissions List**. Click the **Magnifying Glass** icon assigned to it to open the **Permissions Detail Page** (Figure 3-4).
3) Edit the necessary fields, and click the **Submit** button to save your changes.

Deleting User Group Permissions

1) Find the group name from the **Group List** and click the **Set Permissions** link assigned to it. The **Group Permissions Page** (Figure 3-3) for that user group will open.
2) Find the category or document permission you would like to delete from the group permissions list. Click the **Delete** icon assigned to it. A confirmation window will appear.
3) Click the **OK** button. The selected permission will be deleted from the list.

Section 4: Managing Survey Participants

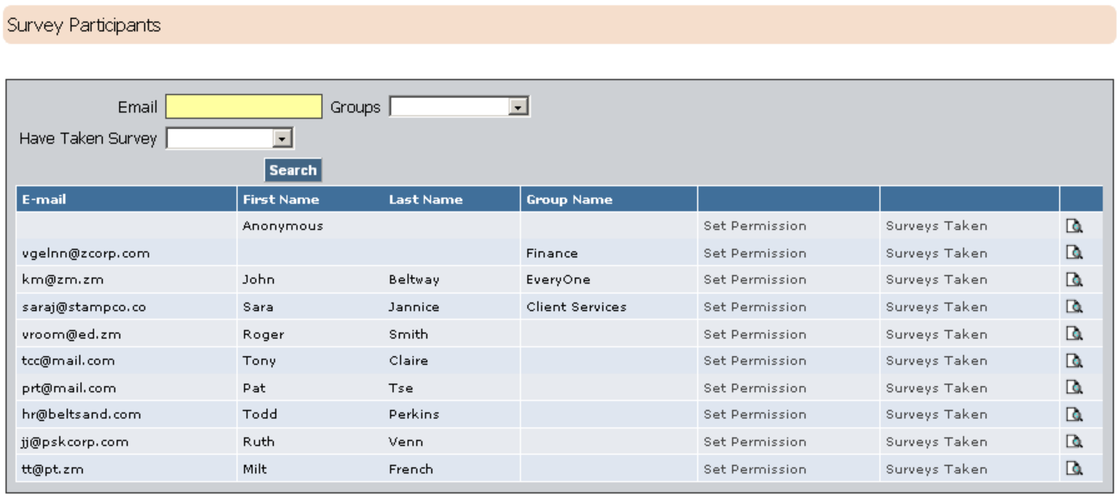


Figure 4-1 Survey Participants page

Within the **Survey Participants page** (Figure 4-1), you can view detailed information about survey participants, surveys completed, and a detailed report of each survey. Additionally, you can export participant information into a CSV file, viewable in any spreadsheet program, such as Microsoft Excel.

Viewing Surveys Taken

The **Survey Participants page** (Figure 4-1) displays a list of each survey participant's **E-Mail Address**, **First Name**, **Last Name**, and **Group Name**.

1) To view surveys taken by a participant, click the **Search** button. You can use the **Email**, **Groups**, and **Have Taken Survey** fields to narrow your search.

2) Find the name or E-Mail address from the Survey Participants page and click the associated **Surveys Taken**.

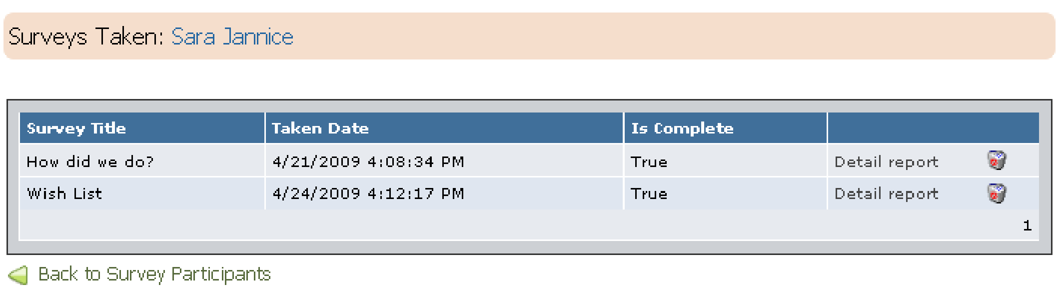


Figure 4-2 Surveys Taken page

3) The **Surveys Taken** page will be displayed (Figure 4-2). The **Completed Surveys List** displays the survey **Title**, **Date Taken**, and **Completed** status for each survey taken by the participant.

4) To see how the user answered each survey, click the **Detail Report** link associated with the appropriate **Survey Title**. You will see the survey score, correct or preferred answers for each question, as well as participant details and the date the survey was taken.

Deleting a Survey Detail Report

1) Find the participant name in the **Survey Participants page** (Figure 4-1) and click the **Surveys Taken** link. The **Completed Surveys List** will be displayed (Figure 4-2).
2) Find the **Survey Title** in the **Completed Survey List** and click the **Delete** icon assigned to it. A confirmation window will be displayed.
3) Click the **OK** button. The selected participant record will automatically be deleted.

Editing Survey Participant Details

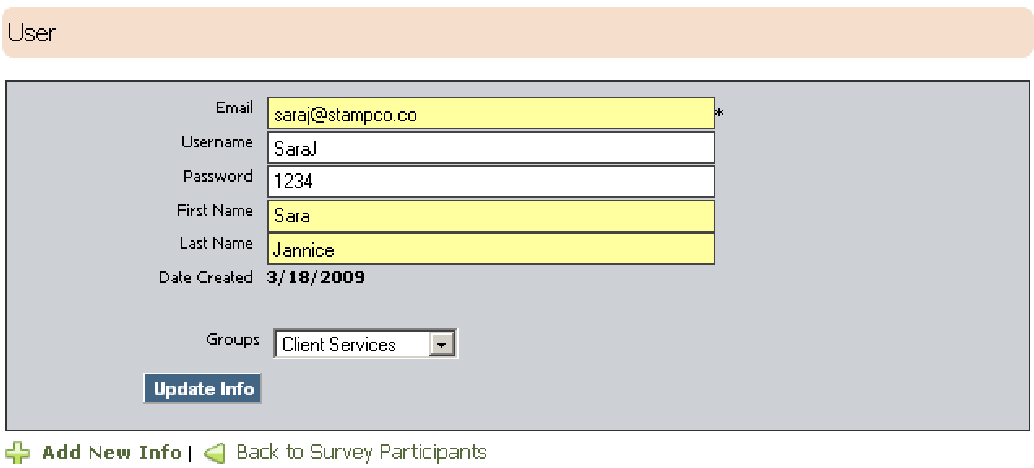


Figure 4-3 User Details Page

1) To edit user details, find the name in the **Survey Participants page** (Figure 4-1) and click the **Magnifying Glass** icon assigned to it. The **User Details Page** opens (Figure 4-3), displaying the **Username**, **Password**, **E-mail**, and **User Group** fields.
2) Edit user detail fields as needed.
3) Click the **Update Info** button.

Configuring User Permissions

You can assign survey permissions to an individual user through the **Survey Participants** page (Figure 4-4).

1) From the **Main Menu**, click **Survey Participants**. The **Survey Participants page** will open and the list of participants will be displayed (Figure 4-1).

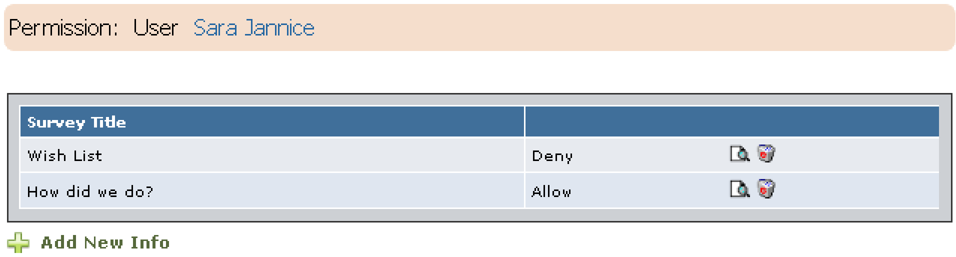


Figure 4-4 Permissions List Page

2) Find the name of the user from the list and click the **Set Permissions** link assigned to it. The **Permissions List** for the selected user will be displayed (Figure 4-4).

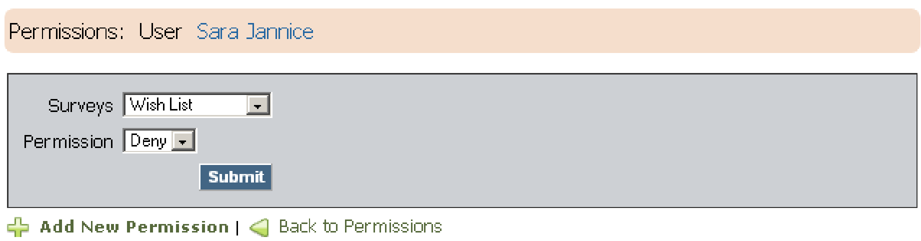


Figure 4-5 Permissions page

3) Click **Add New Permission**. The **Permissions** page (Figure 4-5) will open.
4) Select a survey from the **Surveys** drop-down list.
5) Select a permission level from the **Permission** drop-down menu. (Please see the table below for **Permission Level** details).

Detail	Description
Allow	Allows a use to take the survey and view results.
Deny	Explicitly disallows a user from taking a survey or viewing results.

6) Click the **Submit** button to save your changes.

Section 5: Creating and Customizing Surveys

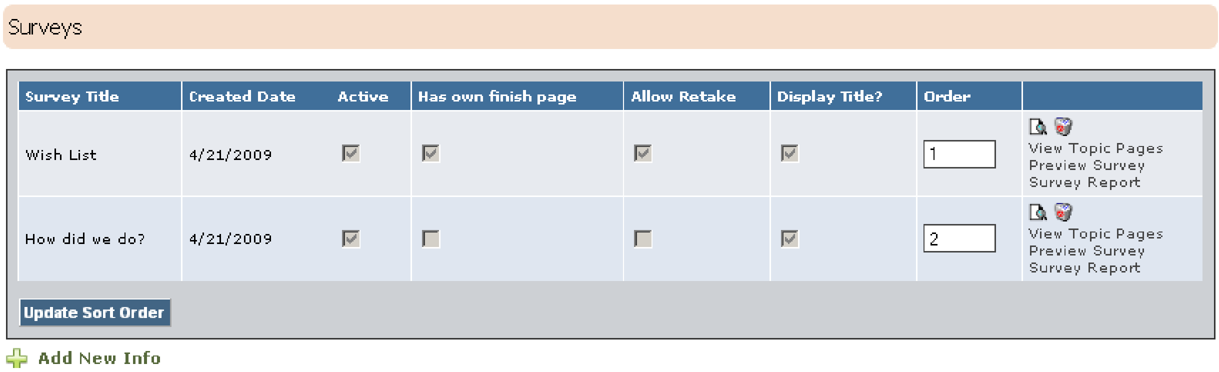


Figure 5-1 Survey page

The **Survey page** (Figure 5-1) displays a list of surveys and each survey's **Created Date**, **Active** status, **Finish Page** specifications, **Retake** options, **Title** display options, and **Sort Order** status. This page also allows you to create, edit and delete a survey, view survey topic pages, display survey previews, and view survey reports.

Creating a New Survey

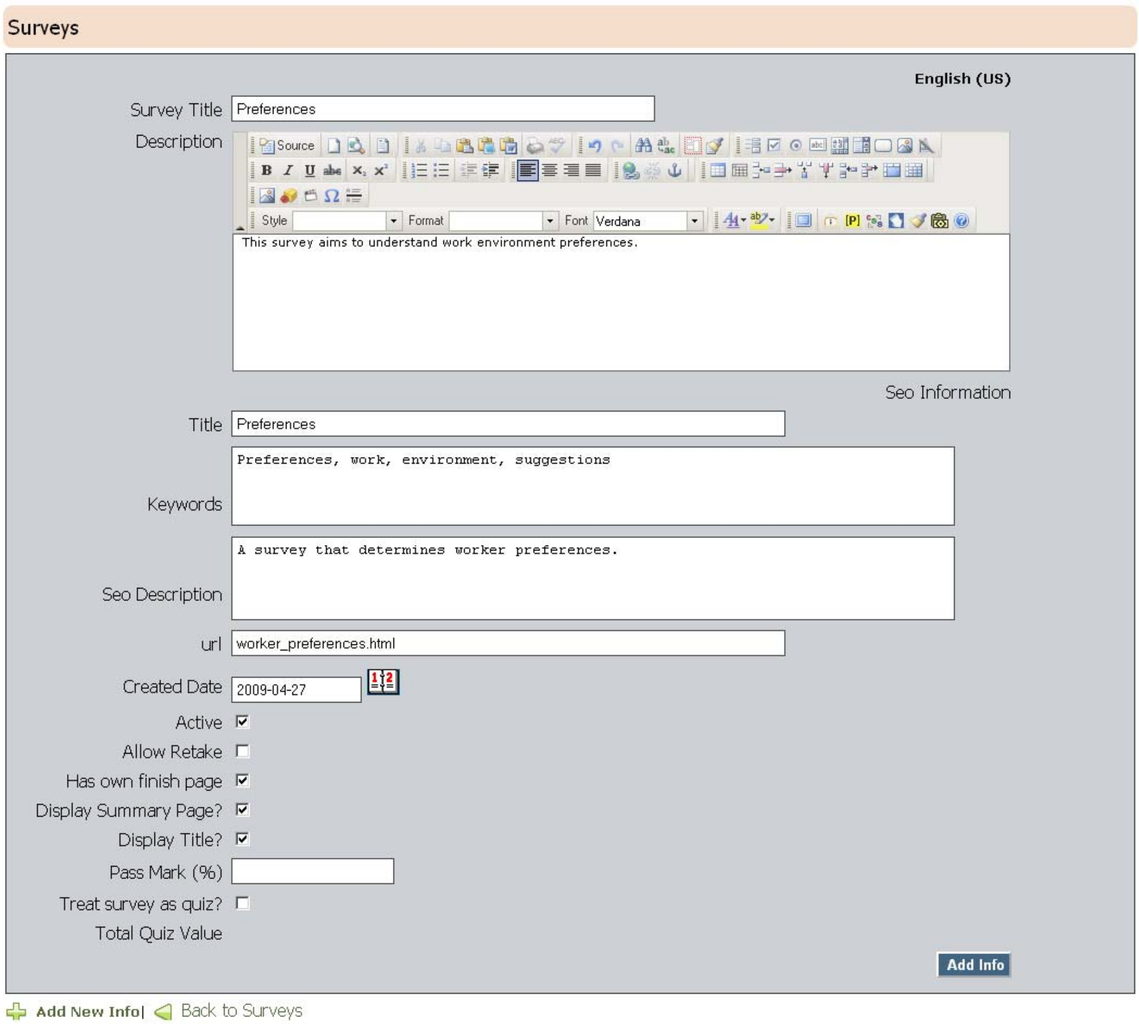


Figure 5-2 Survey Details Page

1) From the **Survey page** (Figure 5-1), click A**dd New Info** button. The **Survey Details** Page (Figure 5-2) will open. Enter a title for the survey in the **Survey Title** field.
2) Enter a survey description or welcome message in the **Description screen**. Use the **Web Content Editor (WCE)** to format your text. If you have configured your site to be displayed in multiple languages, the **Survey Title** and **Description** fields will be displayed in each language.
3) Complete the SEO fields:

Field	Description
Title	What text should appear in the title bar of the browser.
Keywords	Enter keywords associated with this survey for Search Engine Optimization (SEO) purposes.

Field	Description
SEO Description	Enter a summary for this survey. The description will generally be used by search engines in the results as a page summary.
URL	Enter the final block of text for the page name in the URL. This is optional. However, an accurately named URL helps with SEO. Do not use spaces. Only use letters, numbers, and dashes/underscores. For example, "interests_survey".

4) The **Created Date** field displays the date the survey was created. Click on **Calendar** icon to modify the date. You can also enter the date in **YYYY-MM-DD** format.
5) Check the **Active** checkbox to change its status to **Active** and if you would like the survey to be displayed on the Front-end interface. Check **Allow Retake** to enable the same participant to take the survey again.
6) Check the **Has Own Finish Page** checkbox to load the **Survey Finish Message** in its own separate page.
7) Check **Display Summary Page?** to allow survey participants to view a summary of their survey results when the survey is completed. If the survey has been configured as a quiz, the summary page will provide a quiz score and will display the correct answers.
8) Check **Display Title?** to make the **Survey Title** visible to participants.
9) Click **Treat Survey as Quiz?** if you would like to configure the survey as a test. At the end of the quiz, participants will be given a score and a **Pass** or **Fail** rating. To set a pass rating, enter a value (expressed in percent) in the **Pass Mark** field. If the survey is not a quiz, do not use the **Pass Mark** field. The **Maximum Quiz Score** field displays the maximum score that can be received by a participant.
10) Click the **Add Info** button to save your changes. The newly-created survey or quiz will be displayed in the **Survey page**. To view your changes, refresh the browser page displaying the website Front-end interface or click **Back to Site** from the **Main Menu**.

Editing Survey Details

To edit a survey, find the **Survey Name** from the **Survey page** (Figure 5-1) and click on the **Magnifying Glass** icon assigned to it. Edit the necessary fields (please refer to *Creating a New Survey* for details), then click the **Update Info** button. The message **Info Updated Successfully** will be displayed.

Deleting a Survey

To delete a survey, find the **Survey Name** from the **Survey page** (Figure 5-1) and click the **Delete** icon assigned to it. The selected survey will automatically be deleted.

Updating the Survey Sort Order

The sort order is the order surveys appear in your website. Establish a sort order for a survey by entering a numeric value in the **Order Field** in the **Survey page**. A sort order value of **1** will place the survey as first in the list; a sort order value of **2** will place that survey second, and so on. After you have made survey sort order changes, click the **Update Sort Order** button to refresh the sort order status.

Viewing the Survey Report

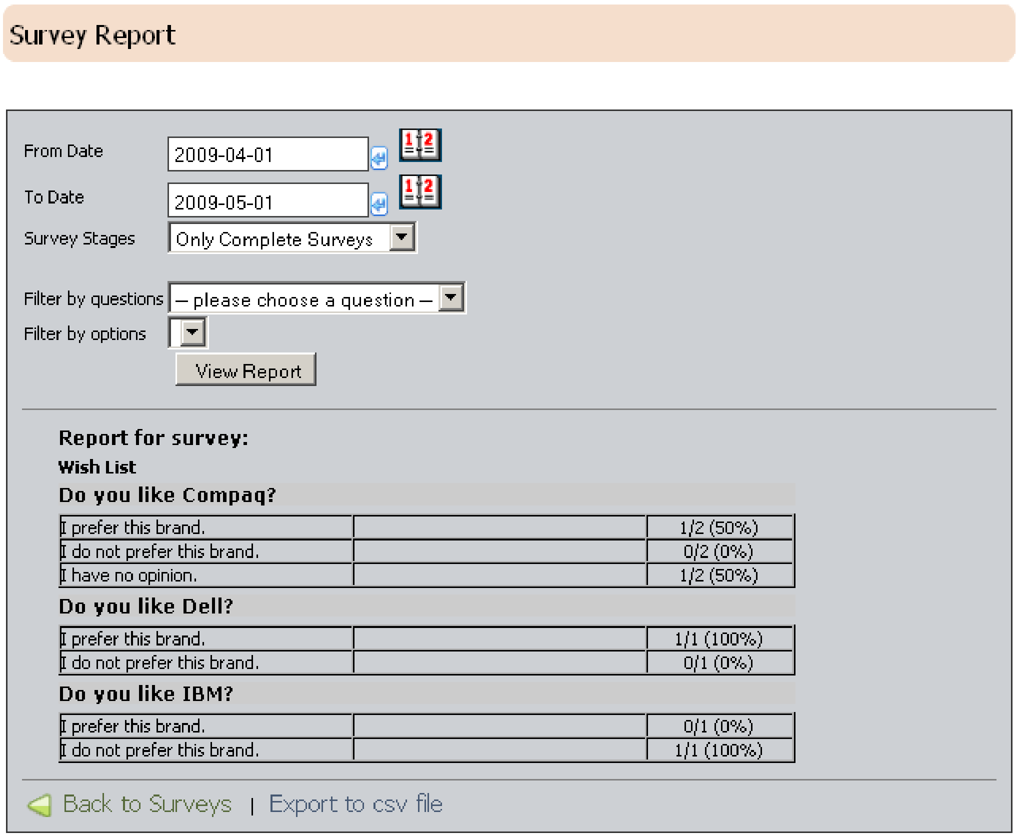


Figure 5-3 Survey Report page

From the **Survey page** (Figure 5-1), click S**urvey Report** to get a detailed summary on the percentages of correct answers for each survey question from the **Survey Report page** (Figure 5-3).

1) Enter a date range in the **From Date** and **To Date** fields following the **YYYY-MM-DD** format. Alternatively, you can use the pop-up calendar to select specific dates by clicking on the **Calendar** icon.

2) Select **Complete Surveys**, **Incomplete Surveys**, or **Both Types** from the **Survey Stages** drop-down box.

3) You can narrow the report results by selecting a question from the **Filter By Questions** drop-down box. If you have chosen to filter by question, you have the option to filter by options by selecting feedback options from the **Filter by Options** drop-down box.

4) Click the **View Report** button to generate the report.

5) You can choose to export the **Survey Report** to your hard drive as a CSV file by clicking on the **Export to CSV file** link. (A CSV file is a text file format that contains comma-delimited values[4], where each piece of data is separated by a comma. CSV files can be opened by spreadsheet applications such as Microsoft Excel.) Once the export process is finished, the message **Click here to download the exported file** will be displayed.

6) Click on the link to download the exported file. A **File Download** dialog box will open. Click the **Open** button to display the file on the page or click the **Save** button to save the export_report.csv file to your computer.

Previewing the Survey

From the **Survey page** (Figure 5-1), click **Preview Survey** to view the survey as it would appear on the Front-end interface.

Section 6: Managing Topic Pages

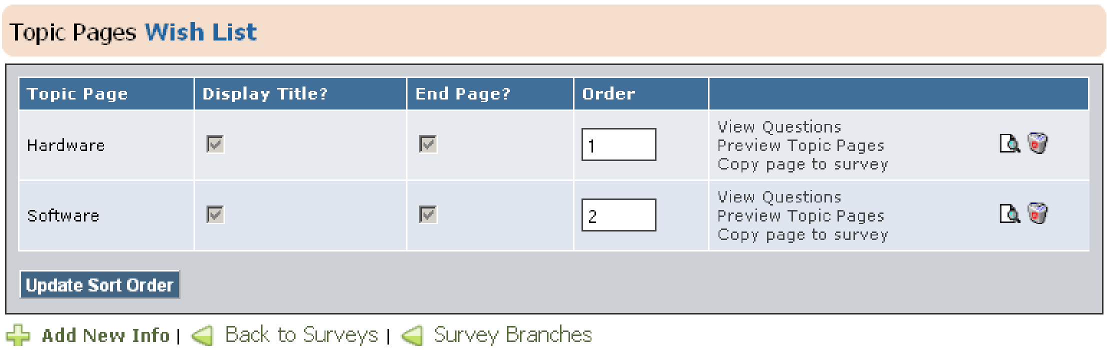


Figure 6-1 Topic Pages

In the **Survey page**, each survey is composed of topic pages that contain survey questions. To view a topic page, click on **View Topic Pages** from the **Survey page** (Figure 5-1). The **Topic Page** will be displayed (Figure 6-1). Within the **Topic Page**, you can create, edit, and delete topic page, create survey questions, preview topic pages, copy topic pages to existing surveys assign topic pages to survey branches, and update the topic page sort order.

Adding a New Topic Page

1) From the **Survey page** (Figure 5-1), click V**iew Topic Pages**. The **Topic Page** (Figure 6-1) will open.

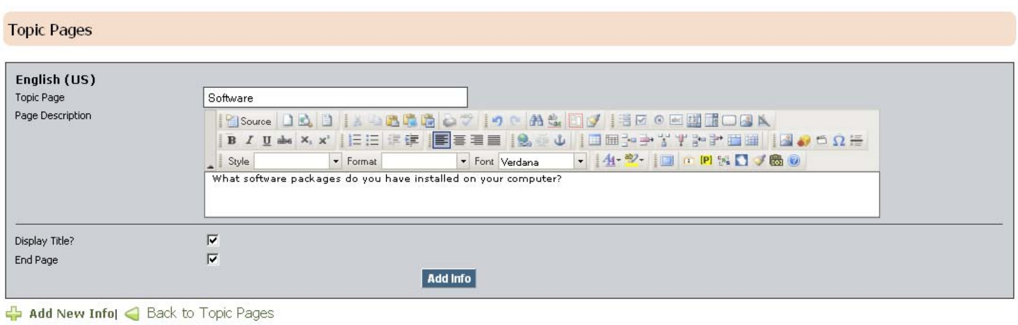


Figure 6-2 Topic Page Detail page

2) Click **Add New Info**. The **Topic Page Detail page** (Figure 6-2) will be displayed. Enter a title for the topic page in the **Topic Page** field.

3) Enter a topic page description in the **Page Description screen**. Use the **Web Content Editor (WCE)** to format your text. If you have configured your site to be displayed in multiple languages, the **Topic Page** and **Page Description** fields will be displayed in each language.

4) Check the **Display Title** checkbox to allow survey participants to view the **Topic Page** title.

5) Check the **End Page** checkbox to mark the page as the last page in the survey.

6) Click the **Add Info** button to save your changes. The newly-created topic page will be displayed in the **Topic Page**. To view your changes, refresh the browser page displaying the website Front-end interface or click **Back to Site** from the **Main Menu**.

Editing Topic Page Details

To edit a **Topic Page**, find the **Topic Page Name** from the **Topic Page** (Figure 6-1) and click on the **Magnifying Glass** icon assigned to it. Edit the necessary fields (please refer to *Adding a New Topic Page* for details), then click the **Add Info** button. The message **Info Updated Successfully** will be displayed.

Deleting a Topic Page

1) To delete a topic page, find the **Topic Page Name** from the **Topic Page** (Figure 6-1) and click the **Delete** icon assigned to it. A confirmation window will be displayed.
2) Click the **OK** button to confirm deletion of the selected topic page. The page will be deleted from the **Topic Page** (Figure 6-1).

Changing the Topic Page Sort Order

The sort order is the order topic pages appear within the survey. Establish a sort order for a topic page by entering a numeric value in the **Order Field** in the **Topic Page**. A sort order value of **1** will place the page as first in the list; a sort order value of **2** will place that page second, and so on. After you have made topic page sort order changes, click the **Update Sort Order** button to refresh the sort order status.

Copying Topic Pages to Existing Surveys

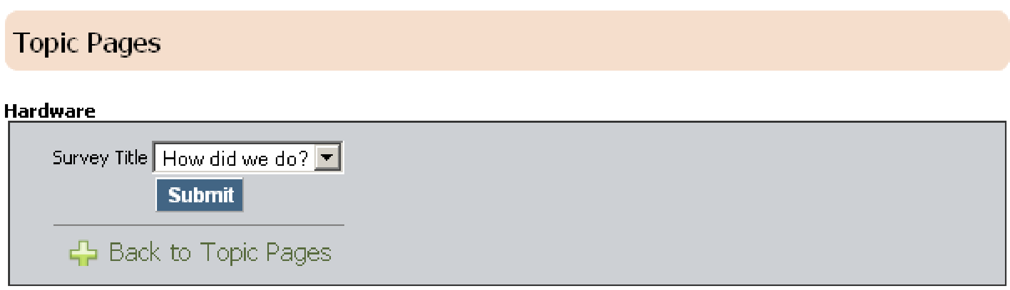


Figure 6-3 Topic Page Copy page

1) To copy a topic page into another survey, click the **Copy Page to Survey** hyperlink from the **Topic Page** (Figure 6-1). The **Topic Page Copy page** (Figure 6-3) will be displayed.
2) Select a survey name from the **Survey Title** drop-down box and click the **Submit** button. The **Message Info Updated Successfully** will be displayed and the selected **Topic Page** will be copied to the selected survey's **Survey page.**

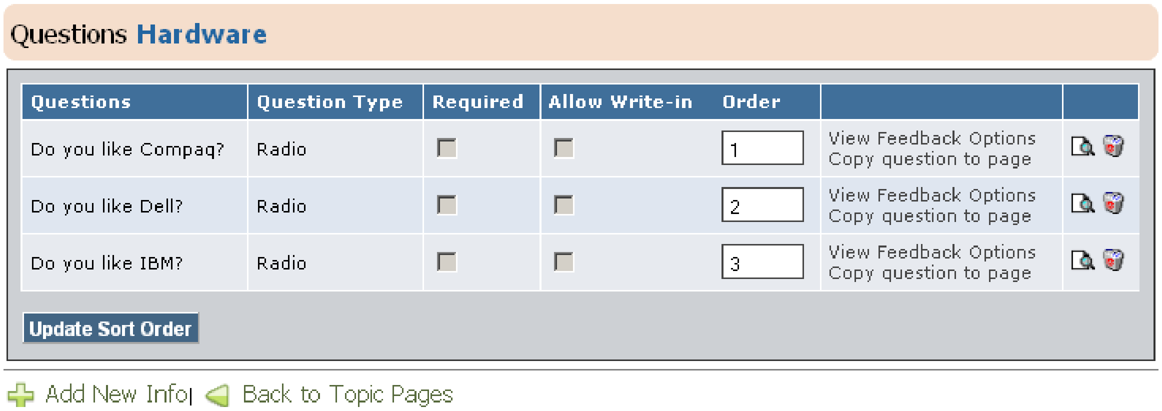
Previewing Topic Pages

Click the **Preview Topic Pages** hyperlink to view your selected Topic Page settings on the Survey Manager Lite *Front-end interface.*

Viewing Topic Page Questions

Click the **View Questions** hyperlink to view **Topic Page** questions and to access the **Questions page** (Figure 7-1). The **Questions page** allows you to add, edit and delete questions within a topic page.

Section 7: Managing Questions and Options



Questions Hardware

Questions	Question Type	Required	Allow Write-in	Order		
Do you like Compaq?	Radio			1	View Feedback Options Copy question to page	
Do you like Dell?	Radio			2	View Feedback Options Copy question to page	
Do you like IBM?	Radio			3	View Feedback Options Copy question to page	

Update Sort Order

Add New Info | Back to Topic Pages

Figure 7-1 Questions page

The **Questions page** (Figure 7-1) allows you to add, edit and delete questions contained within a topic page. You can also change the question sort order, assign feedback options, as well as copy questions to existing topic pages from this menu.

Adding a New Question

1) From the **Survey page** (Figure 5-1), click **View Topic Pages**. The **Topic Page** (Figure 6-1) will be displayed. From the **Topic Page**, click **View Questions**. The **Questions page** (Figure 7-1) will open.

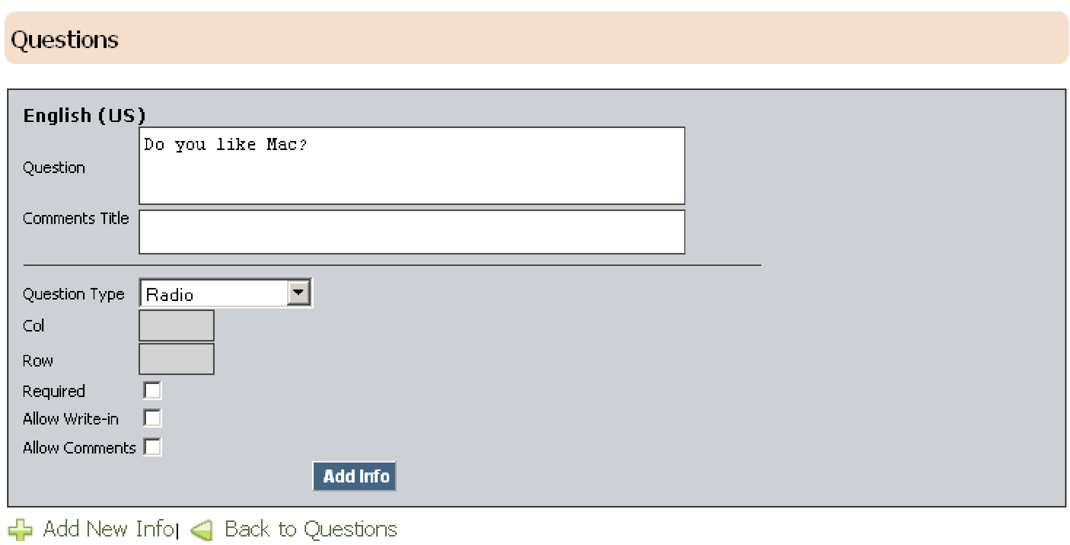


Figure 7-2 Question Details page

2) Click **Add New Info**. The **Question Details page** (Figure 6-2) will be displayed. Enter a question for the topic page in the **Question** field.

3) Enter a title for comments in the **Comments Title** field. The **Comments** field is a textarea that allows survey participants to add comments to **Checkbox** and **Radio** questions after they have

chosen a feedback option. To enable comments, check the **Allow Comments and Allow-write-in** checkboxes.

4) Select the type of question from the **Question Type** drop-down box. The **Question Type** determines the how survey participants are able to answer the question. Each question type has row and column specifications. If applicable, enter a value expressed in pixels. If non-applicable, these properties will be grayed out.

Question Types

Type	Description
Text	A single-line input field, suitable for short responses.
Text Area	A multiple-line field, for longer answers.
Checkbox	A small square box which displays an X when clicked. Within a list, users can click on more than one box to specify their choices. To uncheck a box, users must click the checkbox again to remove the X.
Radio	A list of choices that the user can click to make their selection. This option allows users to click on only one of the choices given.
Selection	A menu presenting the user with a list of choices. The user can highlight an item or multiple items to make a selection.
Matrix-Checkbox	A rectangular array of checkboxes arranged in rows and columns which display an X when clicked. Users can click on more than one box to specify their choices. To uncheck a box, users must click the checkbox again to remove the X.
Matrix-Radio	A rectangular array of radio buttons arranged in rows and columns that the user can click to make their selection. This option allows users to click on only one of the choices given for every row within the matrix.

1) Check the **Required** textbox to make the question mandatory for all participants.

2) Click the **Add Info** button to save your changes. The message **New Info Added Successfully** will be displayed and the newly-created question will be displayed in the **Questions page** (Figure 7-1).

Editing Question Details

To edit a question, find the **Question Name** from the **Questions page** (Figure 7-1) and click on the **Magnifying Glass** icon assigned to it. Edit the necessary fields (please refer to ***Adding a New Question*** for details), then click the **Update Info** button. The message **Info Updated Successfully** will be displayed.

Deleting a Question

To delete a question, find the **Question** from the **Questions page** (Figure 7-1) and click the **Delete** icon assigned to it. The selected question will automatically be deleted.

Changing the Question Sort Order

The sort order is the order questions appear in your survey. Establish a sort order for a question by entering a numeric value in the **Order Field** in the **Questions page**. A sort order value of **1** will place the question as first in the list; a sort order value of **2** will place that question second, and so on. After you have made question sort order changes, click the **Update Sort Order** button to refresh the sort order status.

Copying a Question to an Existing Topic Page

1) To copy a question into another topic page, click the **Copy Question to Page** hyperlink from the **Questions page** (Figure 7-1). You will see the **Question Copy page**.
2) Select a survey name from the **Survey Title** drop-down box.
3) Select a topic page name from the **Topic Page** drop-down box and click the **Submit** button. The **Message Info Updated Successfully** will be displayed and the selected **Question** will be copied to the selected topic page's **Topic Page.**

Managing Feedback Options

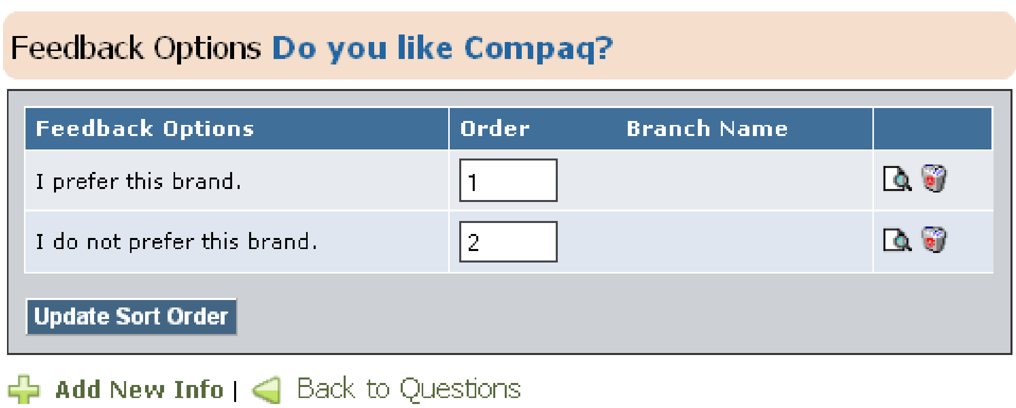


Figure 7-3 Feedback Options page

After adding questions to a topic page, you can now assign feedback options (i.e., actual answer options) to each question through the **Feedback Options page** (Figure 7-3).

Adding a New Feedback Option

1) From the **Survey page** (Figure 5-1), click **View Topic Pages**. The **Topic Page** *(Figure 6-1)* will be displayed. From the **Topic Page**, click View Questions. The **Questions page** (Figure 7-1) will open.
2) Click **View Feedback Options**. The **Feedback Options page** will open (Figure 7-3).

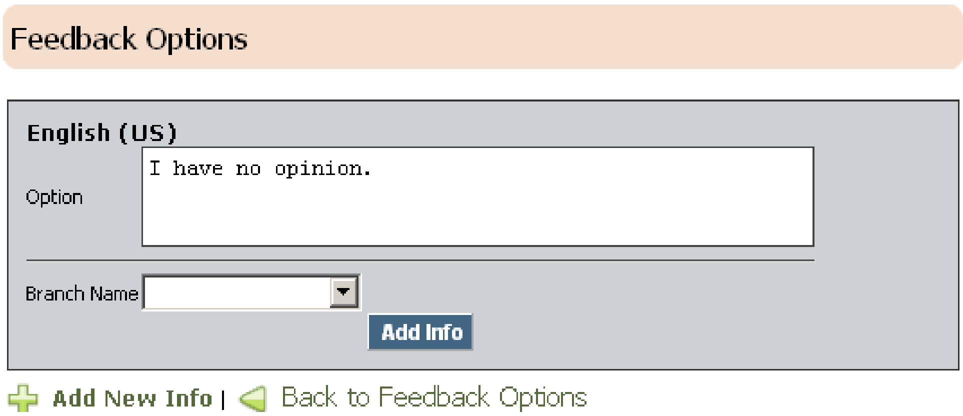


Figure 7-4 Feedback Option Details page

3) Click **Add New Info**. The **Feedback Option Details page** (Figure 7-4) will be displayed.

4) Enter a response for the question in the **Option** field. If applicable, select a branch for the feedback option from the **Branch** drop-down box.

5) For matrix-radio and matrix-checkbox questions, assign a row or column to the feedback option using the **Type** drop-down box.

6) If the survey has been configured as a quiz, enter a value for the feedback option in the **Value** field. You can assign negative values for matrix-radio and matrix-checkbox questions.

7) If the survey has been configured as a quiz, check the **Correct Answer** checkbox to select the feedback option as the correct answer for the question.

8) Click the **Update Info** button. The new feedback option has now been saved.

Editing Feedback Option Details

To edit a feedback option, find the **Feedback Option Name** from the **Feedback Option page** (Figure 7-3) and click on the **Magnifying Glass** icon assigned to it. Edit the necessary fields, then click the **Update Info** button. The message **Info Updated Successfully** will be displayed.

Deleting a Feedback Option

To delete a feedback Option, find the **Feedback Option Name** from the **Feedback Option page** (Figure 7-4) and click the **Delete** icon assigned to it. The selected feedback Option will automatically be deleted.

Updating the Feedback Option Sort Order

1) The sort order is the order feedback options appear after the question. Establish a sort order for a feedback option by entering a numeric value in the **Order Field** in the **Feedback Option page**. A sort order value of **1** will place the feedback option as first in the list; a sort order value of **2** will place that feedback option second, and so on. After you have made **Feedback Option** sort order changes, click the **Update Sort Order** button to refresh the sort order status.

Section 8: Reports

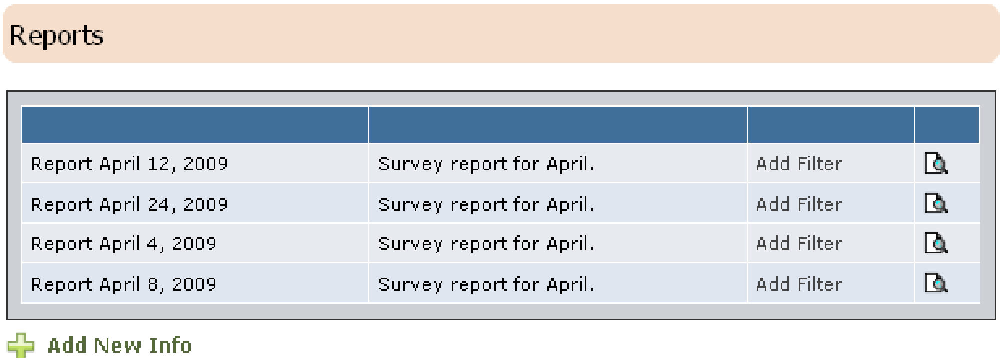


Figure 8-1 Reports page

The **Reports** page lets you set up filtered reports of your surveys.

Creating a Report

Figure 8-2 Adding a search filter

1) Click **Reports** from the right-hand **Main Menu**. You'll see the **Reports** page (see Figure 8-1).
2) Click the **Add New Info** button. You will see the **Report Details** page (Figure 8-2).

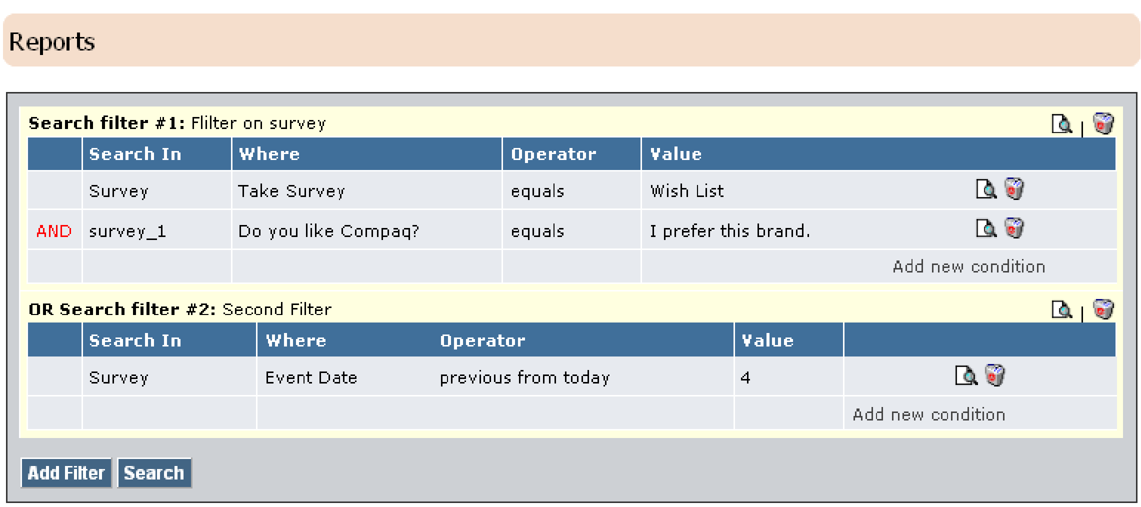


Figure 8-3 Adding a search filter

3) In the **Report Name** field, enter a name for your report.

4) In the **Short Description** field, enter some text to help you remember the intent of the report.

5) Click the **Back to Report List** button.

6) Locate your report on the report page and click its **Add Filter** link. You will see the **Filter** page.

Figure 8-4 Search Filter Name page

7) Click the **Add Filter** button. Enter a name for the filter (Figure 8-4) and click the **Submit** button.

8) Click the **Add new condition** link in the filter table. You will see the **Search Condition** pop-up (see Figure 8-5).

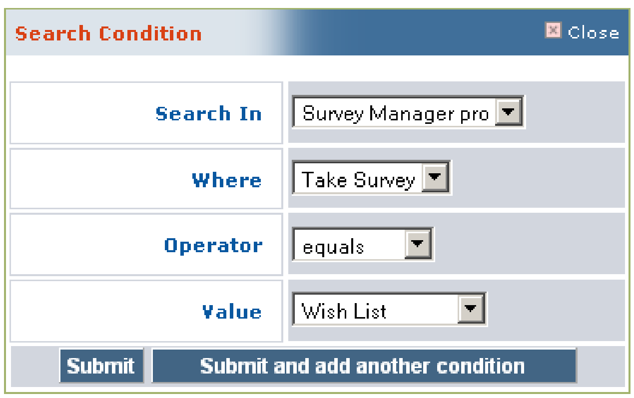


Figure 8-5 Search Condition pop-up

9) In the **Search In** drop-down box, select a survey you want the search to be limited to. You can also select Survey Manager Lite to search all surveys.

10) The **Where** drop down will populate with actions. Select the action you wish to search on.

Value	Description
Take Survey	Search all instances of the survey or surveys being taken.
New Action	Search all instances of any new action performed with the module
Event Date	Search the dates of any action.

11) From the **Operator** drop down select one of the following

Value	Description
Equals	Select **equals** if you wish the search to return results specified in the **Value** field.
Not equals	Select **not equals** if you wish the search to exclude such matches.
Larger	Select **Larger** if you wish the condition to report only on conditions when the total is larger than the matching value.
Smaller	Select **Smaller** if you wish the condition to report only on conditions when the total is smaller than the matching value.
Larger or equal	Select **Larger or equal** if you wish the condition to report only on conditions when the total is greater than or equal to the matching value.
Smaller or equal	Select **Smaller or equal** if you wish the condition to report only on conditions when the total is less than or equal to the matching value.
Previous from today	Select **Previous from today** if you wish the condition to report on a date range. Enter how many days from the current date you want the object to report on. For example, if you want to report on the last 2 weeks of activity, select this operator and enter 14 (i.e., 14 days) in the Value field.
Greater than from today	Select **Greater than from today** to define the "right most" bound of your date range. This will only work in conjunction with a **Previous from today** condition that defines the "left most" bound of your date range. For example, if you want to report on the previous week's activities (so from 14 days ago to 7 days ago), create one condition as noted above and then create a second condition with a **Greater than from today**. To sent the termination date of the date range, enter a negative number. In the example, enter a **-7**.

12) In the **Value** field, select the value you wish to use with your search operator.

13) Click the **Submit** button to add the condition and return to the filter table. If you want to add this condition to the filter table but immediate add another, click the **Submit and add another condition** button.

14) Add additional conditions or filters (see below about **And** and **Or** relationships). Click the **Search** button when you're ready to generate your report.

15) If you would like to save the report's results, click the **Save Search** button. Enter a name and descriptive text for the saved search and click the submit button. The saved results can be viewed any time from the **Saved Search Results** page (see below).

And and Or

If you add multiple conditions they are joined by an **And** condition. Your search will only return results if both the conditions are met. If you create two different filters (via the **Add Filter** button), these filters are treated as **Or** conditions. The search will only return the results that match either filters.

Editing a Report

1) Click **Reports** from the right-hand **Main Menu**. You'll see the **Reports** page (see Figure 8-1).
2) Click the **Add Filter** link to edit the report's filters.
3) Click on the **Edit** icon to edit the reports name and description..

Deleting a Report

1) Click **Reports** from the right-hand **Main Menu**. You'll see the **Reports** page (see Figure 8-1).
2) You will see a list of created reports.
3) Click the report's associated **Delete** icon.

Saved Search Results

The **Saved Search Results** page displays report results you've previously saved from the **Reports** page. You can view the results again or export the results.

Accessing Your Saved Results

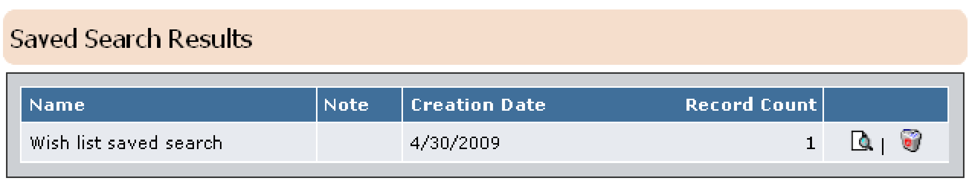


Figure 8-6 Saved Search Results page

1) Click **Saved Search Results** from the right-hand **Main Menu**. You'll see the **Saved Search Results** page (Figure 8-6).
2) Click on the **Edit** icon. You'll be taken to the **Saved Search Results Details page** (Figure 8-7).

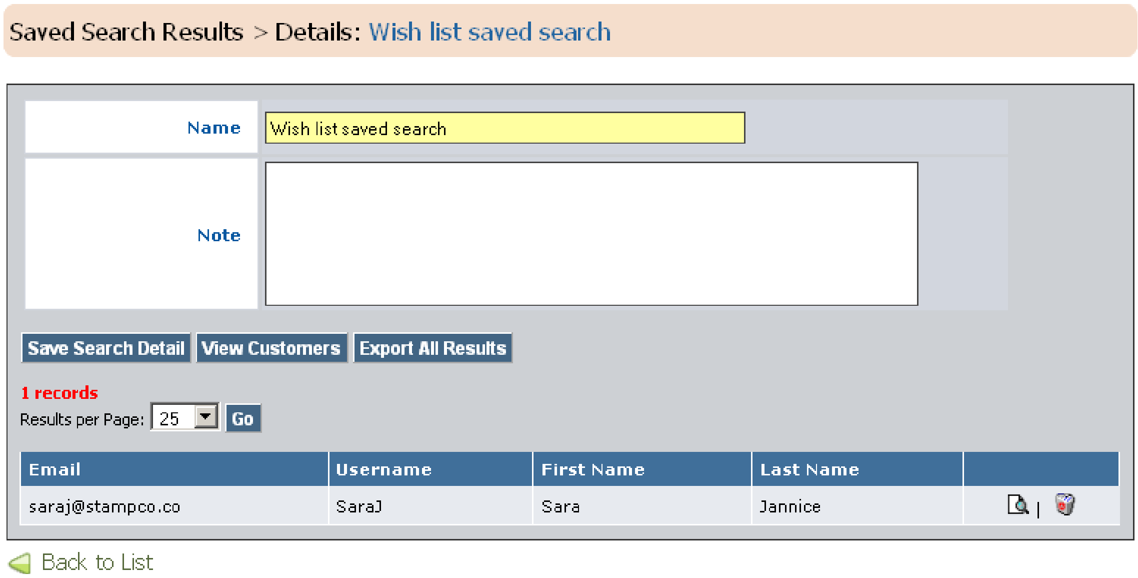


Figure 8-7 Saved Search Results Details page

3) You can modify the **Name** and **Note** fields. Click the **Save Search Detail** button if you do.

4) Click the **View Customers** button to see the saved results.

5) Use the **Results Per Page** drop-down box to control how many results you wish displayed on a page.

6) If you would like to export the results (including the contact details) as a Microsoft Excel spreadsheet, click the **Export All Results** button.

Section 9: Managing Survey Manager Lite Pages

The **Survey Manager Lite Pages Menu** lists all the Web pages within the **Survey Manager Lite**. This menu allows you to configure each page using the WCE tool.

The **Survey Manager Lite Survey Pages Menu** allows you to configure text and Search Engine Optimization (SEO) details for the front-end the **List**, **Display**, **Final**, and **Results** front-end pages.

Configuring a Module Page

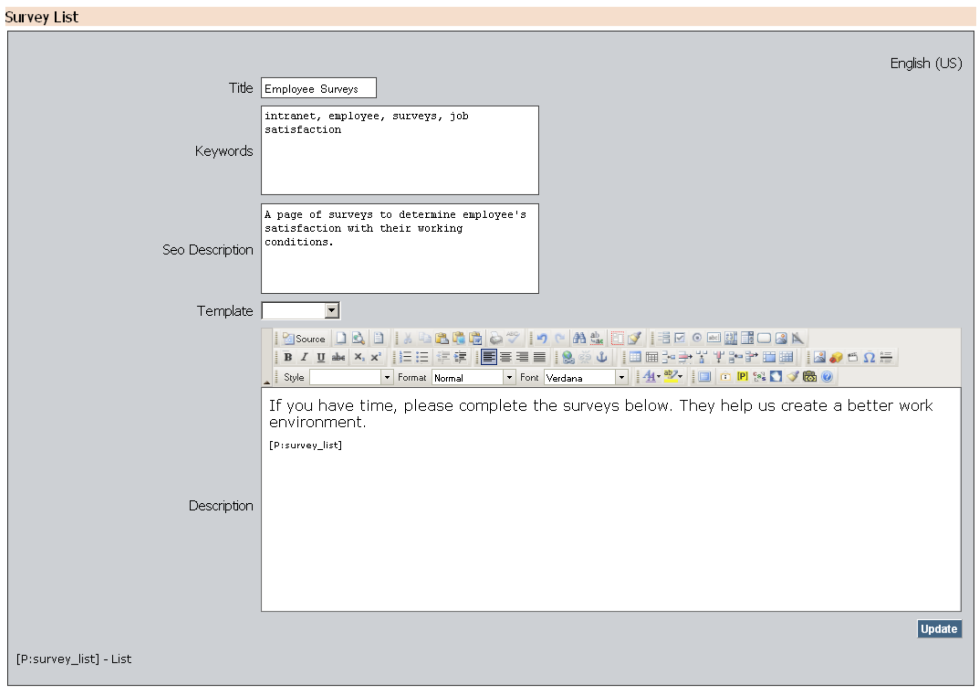


Figure 9-1 The List Page

1) From the right-hand **Main Menu**, click survey page option (for example, **List**).
2) Enter a page title in the **Title** field. The title appears on a browser title line, usually at the top of the window, and is the part of the page displayed on search engines as a link. It also appears in browser **Forward/Backward** lists, as well as in browser Bookmarks and Favorites.
3) Enter keywords for the front-end page in the **Keywords** field. Keywords are words used to search for a topic. Use keywords that best describe your website, its contents, and the products and services offered. Separate each keyword using a comma.
4) Enter a description for the front-end page in the **SEO Description** field. The page description is used by search engines to summarize the contents of a webpage and is displayed with the Page Title and the Web address as part of a search result.
5) Select a template from the **Template** drop-down box.
6) Enter text in the **Description** field. Use the WCE tools to customize the front-end page formatting and layout. You can use the **[p]** placeholder toolbar button to enter a valid placeholder. See the table below for which placeholders are available.
7) When you are finished, click the **Update** button.

Placeholders Available

Module Page	Place Holder	Description
List Page	[P:survey_list]	Displays the list of surveys available within Survey Manager Lite.
Main Survey Page	[P:survey_display]	Displays the actual survey.
Finish Survey Page	[P:survey_final]	Displays the survey's finish page.
Survey Report Page	[P:survey_result]	Displays the survey's results page.

Section 10: Survey Manager Integration

Survey Manager is fully modular and is easily integrated within your Web project in Opensites.

Integrating the Survey Manager Application

1) From the OpenSites Work Area, drag the **Survey Manager** to the page you would like to host the Survey Manager application. The tool icon will appear within the Page icon.
2) Double-click the page icon. The **Page Details View** will be displayed. Click the **Contents** tab.
3) Within the WCE window, position your cursor where you would like the News Manager application to be placed.
4) Click the Insert/Edit Placeholder **[p]** icon. The **Placeholder Propertie**s dialog will be displayed.
5) Select Survey Manager from the Placeholder Name dropdown list and click **OK**. The Survey Manager placeholder will be displayed in the WCE window. You have now successfully added the Survey Manager application to your Web project.

Section 11: Internet Marketing Toolkit Integration

Voloper's Internet Marketing Toolkit (Customer Manager, Campaign Manager, and Dashboard) integrates with the Survey Manager Lite module and captures user activity. The following module activities are captured:

Take a Survey: The toolkit captures which surveys are taken and how often.

Number of Survey Participants: The toolkit captures how many users take each survey.

Adding the Internet Marketing Module

If you do not have the Internet Marketing Toolkit installed, you can drag-and-drop the toolkit from the Work Areas Pane to one of your project pages (e.g., your home page). You do not need to place it on your page via the page details contents tab (i.e., using the [p] placeholder tool). You can access the Internet Marketing Toolkit from your Admin screen like any other module.

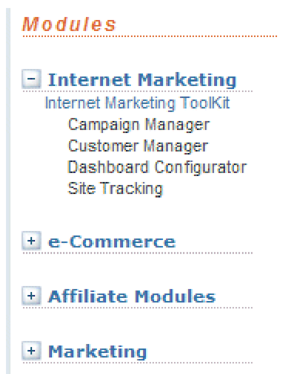


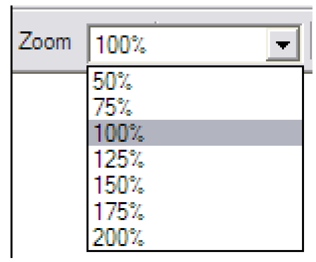
Figure 11-1 OpenSites WDP Internet Marketing Module

Section 12: Talk to Us

Your feedback is important to us. Whether you'd like to share your opinion about a product, ask a question about one of our services, or comment on our website, we want to hear from you. Send your feedback and valuable suggestions to us. We look forward to hearing from you.

Section 13: The Web Content Editor Toolbar Page

- Open File
- Save File
- Format
- Font
- Bold
- Italic
- Underline
- Color
- Align Left
- Align Center
- Align Right
- Align Center
- Number List
- Bullet List
- Decrease Indent
- Increase Indent
- Break
- Subscript
- Superscript
- Horizontal Line
- Special Character
- Cut
- Copy
- Paste
- Paste Text
- Paste from Word
- Undo
- Redo
- Find Text
- Insert Table
- Show Invisible Borders
- Insert Row
- Delete Row
- Insert Column
- Delete Column
- Insert Cell
- Delete Cell
- Merge Cell
- Split Cell
- Style Sheet Manager
- Apply Style



- Link
- Unlink
- Select All
- Remove Format
- Show Details
- Insert File
- Insert Image
- Insert Rollover
- Insert Thumbnail
- Insert Script
- 7Insert HTML Tag

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