

RIX EasySurvey

Administrators' Training Guide



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Introduction

EasySurvey is an online application used to create and send surveys. We believe it is the world's first accessible survey tool and designed to make sure everyone can enjoy taking surveys and having their views taken into account.

When you use EasySurvey you are making an active choice to work in an inclusive way.

EasySurvey has been created by the RIX Centre, who research and develop inclusive technology and are based at the University of East London.

Using this guide

Part 1 of the guide takes you through the process of creating, editing and sharing a simple survey.

Part 2 of the guide shows you how to access the survey results.

Part 3 of the guide shows you the special advanced features of EasySurvey.

Help

For further RIX EasySurvey support, please visit;

<https://rix-wiki-help-desk.groovehq.com/help/rix-easysurvey> for support articles and to raise a support ticket.

Logging in

1. You will need a large tablet (like an iPad) or a laptop or a desktop PC that is connected to the internet.
2. Use a modern browser such as Firefox, Chrome, Safari or Edge. Internet Explorer version 10 and version 11 is supported.
3. Go to: <https://www.rixeasysurvey.org/users/login>
4. Type your email address - this acts as your username.
5. Type your password
6. Click **Login**

Tip

To reset your password, click **Forgotten password** and follow the instructions. Make sure you check for your password reset email from RIX, in your inbox and junk or spam folders.

Tip

EasySurvey voters do not need to log in to EasySurvey to vote in a survey.

The EasySurvey Dashboard

After logging in, users are taken to the **EasySurvey Dashboard**.

The screenshot shows the EasySurvey dashboard for a survey titled "Community Event Feedback Form 2". At the top, there is a navigation bar with tabs for "Users", "Organizations", "Voters", "Surveys", and "Media". A "Log out" button is in the top right corner. Below the navigation bar, there is a search bar and a "Create survey" button. The main content area is divided into two columns. The left column is a list of surveys, with "Community Event Feedback Form 2" selected. The right column shows the details for the selected survey, including a description, status, and survey mode.

Survey Name	Questions	Created	Organization
Community Event Feedback Form 2	8 questions	Created May 24th 2017 3:38 PM	RIX Research and Media
Myself, My Family, My Wiki- Questionnaire 2 (Parent/Carer)	18 questions	Created May 23rd 2017 2:43 PM	RIX Research and Media
(new survey)	3 questions		

Community Event Feedback Form 2
Description: Thank you for attending our recent community event and for taking the time to complete this short questionnaire.
Status: Active
Survey mode: Invite only
Survey contents:
#1 - Question 1. Do you feel that you have received enough information about the event prior to the event?
#2 - Question 2. If you felt you did not receive enough information, what information would you have found useful?
#3 - Question 3. What were you hoping to get out of the event?
#4 - Question 4. What did you get out of today?
#5 - Question 5. Which service was most useful?

Along the top of the Dashboard there is a main menu.



There could be a list of all the surveys you or your team have created in the left panel. If you have not yet created a survey, no surveys will appear in the Survey List.

A close-up of the survey list on the left panel. It shows a search bar with "(show all surveys)" and a dropdown arrow. Below the search bar is a "Sort by: name, date, activity" label. The list contains three items: "Community Event Feedback Form 2" (8 questions, Created May 24th 2017 3:38 PM, RIX Research and Media), "Myself, My Family, My Wiki- Questionnaire 2 (Parent/Carer)" (18 questions, Created May 23rd 2017 2:43 PM, RIX Research and Media), and "(new survey)" (3 questions).

The Survey editing area will automatically show, under the Overview tab, the most recent survey, providing you with options to change or manage this survey.

The screenshot displays the 'Community Event Feedback Form 2' survey overview. At the top, there are four buttons: 'Preview', 'Edit survey', 'Clone survey', and 'Export'. Below these are four tabs: 'Overview', 'Invitations', 'Activity', and 'Entry listing', with 'Overview' being the active tab. The main content area shows the following details:

- Description:** Thank you for attending our recent community event and for taking the time to complete this short questionnaire
- Status:** Active
- Survey mode:** Invite only
- Survey contents:**
 - #1 - Question 1. Do you feel that you have received enough information about the event prior to the event?
 - #2 - Question 2. If you felt you did not receive enough information, what information would you have found useful?
 - #3 - Question 3. What were you hoping to get out of the event?
 - #4 - Question 4. What did you get out of today?
 - #5 - Question 5. Which session was most useful?

Part 1 - Creating a simple survey

Creating a new survey

One of the first things people like to do when starting to use EasySurvey is to create a simple survey and try out all the key features.

In this part of the guide we will show you how to create and test a new survey. In EasySurvey we call the survey taker the **Voter**.

1. Go to the main EasySurvey dashboard
2. Locate the **Create survey** button below the EasySurvey Dashboard main menu
3. Click the **Create survey** button
4. A new survey is created.

Editing a survey

1. Locate the **Edit survey** button in the Survey Editing area
2. Click the **Edit survey** button
3. In the **Survey name** field you can name the survey, click and type a name. (Don't worry, you can change the name of your survey later on.)

4. A new survey will always be set to **Inactive**. Leave this setting as Inactive. This means no one can take your survey while you edit and create it
 5. Leave the survey display mode as **Invite only** whilst you edit the survey
 6. In the **Description** field, you can add text that you would like your voters to see when they start their survey, e.g. *'This is a survey about sweets, please click next to continue the survey'*
 7. **Skip logic** and **Show section headers** will be addressed later in this guide. You won't need these advanced features in a simple survey
 8. In the **Survey questions** field the text will show **No questions added yet**
 9. Click the **Save survey** button
-

Finding your survey in the Survey List

The Survey List contains every survey you have made as well as all the surveys made by other people in your organisation.

Tip

EasySurvey always pools all of your organisation's surveys into the Survey List. This can be really helpful as you can work collaboratively and share media and content. It also means that your Survey Administrators can view the results of any survey created by anyone in your organisation.

The Survey List contains all the surveys and lists them by date in descending order.

Over time, you may find that you have many surveys in the Survey List. You can sort and filter the Survey List to help you locate a specific survey.

The Survey List defaults to **Show all surveys**.

1. Click on the **Show all surveys** drop down menu
 2. You are given the option to see surveys created in a specific month
 3. Underneath the drop down menu there are three view options:
 - name** - the name of the survey (in alphabetical order)
 - date** - the date the survey was created (in chronological order)
 - activity** - the surveys which have been most recently activeJust click on the option to re-order the Survey List
 4. Please note, the drop down menu will only show past months where surveys have been created and new users may not have any options in the drop down menu list.
-

Adding a Single select question

Use the **Finding your survey** and **Editing a survey** instructions above. Below we explain how to create a question in a survey.

1. Select your survey from the Survey List
2. Click **Edit survey**
3. Click **Add question**
4. The **Question editor** window will pop up
5. In the **Question Text** field, type the question, e.g. Which sweet is your favourite?
6. Click the **Question format** (single select is the default question type)
7. Click **Single select**

RIX Tip: EasySurvey has various question formats which we review later in this guide.

The **Include free type 'other'** option allows your survey voter to free type their own response into your survey if they don't want to choose from your options. For example, you might ask *'What is your favourite sweet?'* with the options *Yorkie* or *Smarties*. The user may not like either of these options, so can free type *'Crunchie'* to answer the question in their own way.

By default, the **Include free type 'other'** field is not activated on new questions. Check the box to activate this option.

If the **Required entry** option is activated (via the check box) this question is compulsory for the survey voter. The voter cannot move past this question until they have selected an answer.

By default, the **Required entry** field is not activated on new questions. Check the box to activate this option.

The **Question media** area (to the right of the **Question editor window**) gives the survey creator the option to add one image, one video and one audio clip to this question.

Adding images, video and audio is covered in the later chapters of this training guide.

Adding Single select answers

After completing the steps in the Adding a Single select question section of this guide, it is time to add some options for the voter to choose from.

As the name suggests, a single select question allows the voters to select just one option from your list or to provide their own if you have checked **Include free type 'other'**

1. Click **Add answer option**
2. A new answer option is created
3. Type a possible answer in the **(new option)** field, eg. Dairy Milk chocolate
4. The **Camera** icon allows you to add an image from your **Media Library** to each answer. Later on in this guide we provide instructions on the use of the **Media Library**
5. You may wish to add additional answer options by clicking **Add answer option**.
6. To delete an answer option, click the red **Delete option** button associated with the answer option you wish to delete
7. Once you have added all the answer options for your question click **Save question**
8. Click **Close**

You are now back in the **Survey editor** window.

You will see that your new question has been added to your survey.

New questions are always added to the end of the question list.

You can change the order of questions in your list by dragging and dropping the questions up and down the list.

Adding a Multiple select question

A **Multiple select** question allows voters to select one or more options. An example of this question type is *'Which are your favourite animals? Pick at least three from this list.'*

To add a **Multiple select** question, follow the same process as for a **Single select** question (see above).

Underneath the **Question text** there are some settings for Multiple select responses.

Min number of choices - allows the survey creator to stipulate the minimum number of choices the voter must make for this question.

Max number of choices - allows the survey creator to stipulate the maximum number of choices the voter can make for this question.

To change the default number in these fields, click in the field and overwrite the existing number.

Tip: There is no warning message if you type a number in the **Min number of choices** field that is greater than the number of answers provided.

Adding a Multiple select answer

To add a **Multiple select** answer follow the same process as with a [Single select answer](#).

Adding a Rating scale question

A **Rating scale** question allows the voter to drag a bar along a scale that the survey creator designs.

To add a **Rating scale** question follow the same process as for a **Single select** question.
[p8]

Adding a Rating scale answer

1. Click **Add answer option**
2. A new answer option is created
3. Type the answer (label) you would like to add to the left side of your scale
4. The **Camera** icon allows you to add an image from your **Media Library** that will align with the label you have added.
5. Later on in this guide we provide instructions on the use of the **Media Library**.
6. To add a second answer option, click **Add answer option**. This answer's label will align to the right hand side of the scale.
7. Your third answer label will align to the centre of the scale.
8. EasySurvey intelligently spaces all possible answers along the scale with equal spacing. So you may add further answers (labels) to the scale.
9. Having three answers label works really well in a simple survey but you can have up to ten
10. To delete an answer option, click the red **Delete option** button associated with the answer option you wish to delete
11. Once you have added all the answer options for your question, click **Save question**
12. Click **Close**

You are now back in the **Survey editor** window.

You will see that your new question has been added to your survey.

Adding a Ranked list question

A **Ranked list** question allows the voter to drag answer options up and down a list. The items on the top of the list are considered more preferable and the items at the bottom of the list are considered less preferable.

An example of this question type is *'order the chocolate bars in the list by dragging your favourite to the top, least favourite to the bottom etc'*.

To add a **Ranked list** question follow the same process as for a **Single select** question. [p8]

Adding a Ranked list answer

1. Click **Add answer option**
2. A new answer option is created
3. Select **Ranked list** from the **Question format** drop down list
4. Type the answer you would like to add to the top of your list (don't worry, you can change the order of answers later)
5. The **Camera** icon allows you to add an image from your **Media Library** that will align with the label you have added
6. Later on in this guide we provide instructions on the use of the **Media Library**.
7. To add additional answer options, click **Add answer option**
8. To delete an answer option, click the red **Delete option** button associated with the answer option you wish to delete.
9. Once you have added all the answer options for your question click **Save question**
10. Click **Close**

You are now back in the **Survey editor** window.

You will see that your new question has been added to your survey.

Adding a Text entry question

A **Text entry** question allows the voter to respond by typing in their own answer.

An example of this question type is *'Describe how you will put into practise what you have learned on this course'*.

To add a **Text entry** question follow the same process as for a **Single select** question.

Adding a Text entry answer

By definition, a **Text entry** question has no selectable answer options. The voter responds to this question by typing in their own answer.

To support you to experiment with different question types, you will notice that there is the option to add answers. Voters will not see these answers in a **Text entry** question. When a survey creator changes the question type from **Text entry** to **Single select**, for example, the answers are retained and will automatically become visible to the survey voter.

Adding images to questions

Introduction

EasySurvey has been designed to make the most of multimedia. At RIX, we believe that text, images, video and audio are essential for effective communication and engagement for everyone.

In EasySurvey you can add pictures, video and audio to the:

- Survey start page
- Question pages
- Individual answer options
- Information pages

The Media library

Select the Media option in the Dashboard main menu. This area contains the media for your organisation.

If you are the first user of EasySurvey, the Media library may be empty. If other people in your organisation have been using EasySurvey for some time, you may see lots of images and videos already in your library.

You can store the following media in your library:

- Images
- Video
- Audio

The file formats supported by EasySurvey for each media type are:

- Images (jpg and png)
- Video (flv Flash, 3gp, 3gpp, mov, m4v, mpg, wmv, mp4 and QuickTime)
- Audio (aac, aiff, m4a, mp3 and wav)

Tip: Some file types are not accepted by EasySurvey. You cannot upload a Word document or PDF to your Media library.

Tip: The Media library should not be used as a backup facility for your content. Always keep the original media safe on your own device or storage system, locally or in the cloud.

The idea behind the Media library

Your Media library will be used to store media from everyone in your organisation. This means that frequently used images (for example your organisation's logo) can be uploaded once and used by everyone across multiple surveys.

The layout of the Media library

The Media library is divided into three sections.

Upload area

A space for you to drag and drop media from your computer. This will then be uploaded to the Library.

Image editor

A space to crop and edit images within EasySurvey itself.

Library

The space below the Upload area and Image editor displays all the media you and other people in your organisation have added to the Media library.

The Upload area

You may have images, video or audio files on your computer. If you want to use them in a survey you need to upload them to EasySurvey.

Tip: To add media from a cloud storage service such as Google Drive or Office 365, download the media to your desktop or another folder on your computer first.

1. Click the Upload area
2. A file explorer window appears
3. Select the file you wish to upload
4. Click OK or Open
5. The file is uploaded to the Media Library

You can also add media by dragging and dropping files onto the Upload area.

You can upload up to a 100 files at a time.

The maximum individual file size is **15MB**.

Image editor

You can crop images that you have uploaded to the Media library.

1. Click on the image you wish to crop in the Library
2. The image appears in the Image Editor area
3. Use the blue squared icons (cropping handles) on the corners of the image to adjust the crop
4. Click **Crop and Save**
5. A new cropped image is generated and added to the Media Library alongside the original unedited image

Library

The Library will quickly increase in size as you add media to EasySurvey.

There are no folders to organise your media. You can use the Media search tools at the top of the Media library.

To find media you can

- Search by name
- Filter to show one media type, e.g. just images
- Filter to show media added in a specific month
- Filter to show media that you personally uploaded. (This removes from view all the images that were uploaded by other people in your organisation.)

Tip: Remember, this is a shared library. If you delete media, that media is deleted for everyone.

Tip: If you delete a media asset (image, video, audio) from the Library that is being used in a survey, the survey will show a blank space placeholder, where the media asset was originally included.

Editing questions

1. Locate the **Edit survey** button in the Survey Editing area
2. Click the **Edit survey** button
3. Locate the question in the Survey questions list that you wish to edit
4. Click **Edit**
5. The Question text and Answer options can be edited
6. Click **Save question**
7. Click **Close**

Deleting questions

1. Locate the **Edit Survey** button in the Survey Editing area

2. Click the **Edit Survey** button
3. Locate the question in the Survey questions list that you wish to edit
4. Click **Delete**
5. Click **Save survey**
6. Click **Close**

Organising questions (changing the order of your questions)

Once you have created your questions in a survey you may decide that you would like to put them in a different order.

1. Click the **Edit survey** button in the Survey Editing area.
2. Locate the Survey questions list
3. Click on the grey bar of the question text
4. Drag the question up or down the list
5. Click **Save survey**

Adding, editing and deleting an Info page

EasySurvey has four types of pages.

- A Title page that introduces the survey (you can only have one of these)
- Question pages (you can have as many of these as you wish)
- Info page (you can have as many of these as you wish)
- Finish page (you can only have one of these)

An Info page is similar in design to a Title page. It includes:

- a title
- a text description
- space for media (one image, video and audio file)
- forwards and backwards navigation buttons

People use an Info page to introduce an idea or to help structure their survey into different sections.

It is not essential to have an Info page, it is an additional feature of EasySurvey that can help to improve accessibility by breaking up a complex idea over a number of pages. At RIX we

describe accessible information as 'easy to read'. The Info page allows for messages to be broken down into a series of easy to read Info pages.

Adding an Info page to a survey

1. Select your survey from the Survey List
2. Click **Edit survey**
3. Click **Add info page**
4. The **Information page editor** window will pop up
5. In the **Information page title** field, type the title, e.g. '*Crossing the road*' (the voter will see this title)
6. In the **Information page admin title** field, type the title e.g. '*This explains the next set of question about road crossing safely*' (the voter will not see this admin title)
7. In the **Information page body text** field, add the text that the voter will read on the Info page
8. Media can be added to the Info page. See [The Media library](#) section of this guide
9. Click **Save info page**
10. Click **Close**

Editing an Info page in a survey

1. Select your survey from the Survey List
2. Click **Edit survey**
3. Locate the Info page in the Survey questions list
4. Click **Edit**
5. The **Information page editor** window will pop up
6. The **Information page title** field, **Information page admin title** field and **Information page body text** field can be edited
7. Make any changes you want to make
8. Click **Save info page**
9. Click **Close**

Deleting an Info page in a survey

1. Select your survey from the Survey List
2. Click **Edit survey**
3. Locate the Info page in the Survey questions list
4. Click **Delete**
5. Click **Save info page**
6. Click **Close**

Deleting a survey

The **Delete survey** action cannot be undone.

EasySurvey does not have a recycle bin and surveys that are deleted cannot be recovered.

1. Select your survey from the Survey List
 2. Click **Delete survey**
 3. You are prompted to confirm by clicking **Delete survey**
-

Testing your survey using the Preview feature

Once you have created your survey, you will want to see what it feels like to take the survey as a voter.

The **Preview** function lets you do this.

The **Preview** function launches your survey in a new tab in your browser. You can complete the survey by answering each question. Your answers are not saved or stored.

1. Select your survey from the Survey List
2. Click **Edit survey**
3. Click the blue **Preview** button next to the survey title text
4. The survey opens in Preview mode in a new tab
5. You can complete the survey
6. When you have finished previewing your survey, close the tab

Tip - If you spot something you want to change, close the Preview survey tab, edit the survey to make the changes and, after saving, click on the blue preview tab again - this will incorporate your recent changes

Sending out your survey

Making your survey Active and survey status types

1. Select your survey from the Survey List
2. Click the **Edit survey** button

3. A new survey will always be set to **Inactive**. This means no one is able to take your survey while you edit and create it
4. Click the **Status** drop down menu and select **Active**

Status types and what they mean:

Inactive	No voters can take this survey - it is closed
Active	Voters can take this survey - it is open
Date range	You can select a date range for the survey to automatically open and close without you needing to change the Active/Inactive setting manually
Archived	This is a visual marker for the Administrator. An Archived survey is the same as a Inactive survey with an Archived label applied by the Administrator.

Deciding how your survey is set up through the display mode

1. Select your survey from the Survey List
2. Click the **Edit survey** button
3. Click the **Service display mode** drop down menu to review the options

Invite only

These survey invitations will be sent directly to specific users through their email address. The survey voter can only vote once using the unique code sent to them.

Kiosk, open to all

These surveys are accessed via a weblink. You can send this link to anyone. They can complete the survey by clicking the weblink that is unique to this survey. Voters can complete unlimited surveys using this link. Kiosk mode has a feature that instructs the survey to start again after it has been completed. Therefore it works in situations where you have a survey that you want lots of people to take in a public space, for example.

The easiest setting to start with if you are new to EasySurvey is **Kiosk, open to all**.

Using Invite only display mode

The **Invite only** display mode allows you to send out an email invitation to specific people or groups of people.

In order to invite people to the survey you need to add them to the Voters area of EasySurvey.

Adding a new voter

1. Click **Voters** In the Dashboard main menu
2. Click **Add new**
3. Type the voter's first name into the **Voter first name** field
4. Type the voter's surname or family name into the **Voter last name** field
5. Type the email address of the voter in the **Voter email** field
6. There is a **Voter groups** field, leave this field empty for the moment
7. Click **Save**

Creating a Voter Group

Once you have created your voters using the instructions to **Add new** voter, you have to create a **Voter group**.

The purpose of a **Voter Group** is to send out a survey invite to a group of voters.

A voter can be a member of multiple groups.

An example of using a Voter group:

In this example, imagine you have led a Person Centred Planning training event. You want to invite each delegate who attended the event to complete a survey to evaluate the training. In this instance you would add all the delegates (voters) into EasySurvey using **Add new** voter. You would create a group called *PCP event 11 July 2019* - adding the date will help to remind you of the reason for the group. You can then send the survey to the *PCP event 11 July 2019* voter group and the survey would be sent to all the voters in this group.

To create a new voter group

1. Click **Voters** in the Dashboard main menu
2. Click **Group editor**
3. Click **Add new voter group**
4. Enter a short name (The short name is used for on-screen display to save space and text wrapping)
5. Enter voter group name (The long name allows a fuller description of the group)
6. Click **Save**
7. Close the window by clicking on the cross in the top right hand corner

Adding a voter to a Voter group

1. Click **Voters** in the Dashboard main menu

2. Locate and click the voter you wish to add to the group in the Voter list on the left side of the screen
3. Locate the **Voter groups** field
4. Begin to type the name of the group you would like this voter to join
5. The group name will automatically appear
6. Click the group name and it is then added as one of the voter's groups. A voter can join multiple groups
7. Click **Save**

Tip: Voters and groups are shared throughout an organisation, so voters you add and groups you create are seen by all EasySurvey users in your organisation.

Removing a voter from a Voter group

1. Click **Voters** in the Dashboard main menu
2. Locate and click the voter you wish to remove from the group in the Voter list on the left side of the screen
3. Click on the **Voter groups** field
4. Select the Voter group that you wish to remove the voter from
5. Click the small cross on the Voter group label
6. The Voter is removed from the Voter group

Sending an Invite only survey to a Voter group via email

1. Select your survey from the Survey List
2. Locate and click the **Invitations** option in the Survey menu
3. Click the **Select voter group** drop down menu
4. Select the Voter group that you wish to send this survey to

Generating a card for an Invite only survey

1. Select your survey from the Survey List
2. Check that your Survey is in **Invite only** mode
3. Check that your survey is **Active**
4. Locate and click the **Invitations** option in the Survey menu
5. Click the **Select voter group** drop down menu
6. Select the Voter group that you wish to send this survey to
7. On the **Select voter group** line, click **Create PDF**

8. A new tab is created in your browser displaying a PDF which can be printed or downloaded. This PDF contains the invitation with the name of the Voters and their unique weblink

Using Kiosk, open to all display mode

These surveys are accessed via a weblink. You can send this link to anyone you wish to.

The benefits of **Kiosk, open to all** are:

- You do not need to create Voters or Voter groups
- You can copy and paste the weblink for the survey into an email and send this to the Voters you wish to invite to the survey
- You can still stop voters from accessing the survey through the use of the **Inactive** setting in the Survey editor.

The disadvantages of using **Kiosk, open to all** are:

- Voters can distort your results by submitting multiple survey responses
- A Voter can share the link with an unauthorised person who can then complete the survey

1. Select your survey from the Survey List
2. Check that your Survey is in **Kiosk, open to all** mode
3. Check that your survey is **Active**
4. Locate and click the **Invitations** option in the Survey menu
5. The Invitations page will show a URL (weblink) for you to copy and use as a link to the live survey
6. There is also a QR (barcode style image) that links directly to the live survey
7. You can generate an **Invites to named voters** through the **Create PDF** button
8. You can generate an **Invites to anonymous voters** through a PDF. You can select how many invites are generated, up to a maximum of 100

Part 2 - Viewing the results collected by a survey

Viewing the results from a survey

After creating and sending a survey out, your voters will begin to take the survey and answer the questions you set.

EasySurvey collects their responses and allows you to review these in different ways.

Activity information

1. In the Survey editing area click the **Activity** option
2. The results from each question are presented

Results that can be interpreted in numerical data are presented with a % and number of votes per answer option.

Results that cannot be interpreted in numerical data (text entry questions) are presented with a word cloud. This puts together all the text added by all voters. The size of the word relates to the frequency of its use. Larger words in the word cloud denote a high frequency of use.

Entry Listing information

1. In the **Survey editing area** click the **Entry listing** option
2. The results from each voter are presented
3. Each voter is given a unique ID attributed to them automatically by EasySurvey
4. The time and date they completed the survey is listed
5. A red **bin** icon next to the voter, allows users to delete that single survey response. (There is no undo or recycle bin facility when deleting a response)
6. There is no option to delete or edit an individual response to a specific question

Export survey data

1. In the **Survey editing area** menu click the **Export** button
2. The results from this survey are downloaded to your PC in a Microsoft Excel format
3. You can open, edit and present the data using Microsoft Excel

Part 3 - Using advanced survey creation features

Clone survey

Imagine you have created a survey for a training event. If you choose to re-run the event, you can clone the original survey. Cloning the survey only clones the questions and answer options, it does not clone the responses from your voters.

To clone a survey:

1. Select your survey from the Survey List
2. Click **Clone survey**

3. The survey is cloned and added into your Survey List
4. The survey will be named as *Survey Name (copy)*. Therefore a survey named *Favourite Sweets* will become *Favourite Sweets (copy)*
5. **Edit survey** and you can change the title and remove the *(copy)* text

Skip logic

Skip logic allows you to create complex surveys with multiple routes through the questions depending on the answers the voters give.

For example, a restaurant creates a survey to ask clients how their meal tasted. If you ask, 'Did you have a starter?' The response 'Yes' will take the user to the question 'How did you rate your starter?'. However, if the client did not eat a starter, they would select 'No' and would be taken to the question 'Did you have a main course?'.

Skip logic allows voters to only answer questions that are relevant to them.

Before you start, there are some points to consider:

- **Skip logic** must be set up and activated prior to voters taking part in the survey
- You cannot set up **Skip logic** retrospectively, after a voter has completed a survey.
- The **Skip logic** mode supports **Single select** or **Rating scale** questions
- The **Skip logic** mode will **not** support **Text entry**, **Ranked list** or **Multiple select** questions

Turning Skip logic on

1. Locate the **Edit survey** button in the Survey editing area
2. Click the **Edit survey** button
3. Check the box for **Skip logic active**
4. Check the box for **Show section headers**
5. Click **Save survey**
6. Please note that you must click **Save survey** to activate **Skip logic**

How Skip logic works

To make **Skip logic** work, you will need to create sections in your survey. A survey could be composed of different sections to organise the groups of questions. Here is an example of a **Skip logic** survey structure.

Title page: Restaurant feedback survey
Section 1 - Starter?
Did you eat a starter? - Answers: Yes, No
Section 2 - Rate starter
Rate your starter from 1 - 10
Section 3 - Main course?
Did you eat a main course? - Answers: Yes, No
Section 4 - Rate main course
Rate your main course from 1 - 10
End of survey - Finish page

Skip logic allows you to direct voters who did not eat a starter straight to section 3 to ask them if they ate a main course.

At the end of a section, a voter can be made to do any of the following:

- Continue the survey into the next section in the sequence.
- Skip straight to section 'x' (you can choose the section you want them to skip to)
- Submit the survey immediately, ignoring any further sections and questions

Creating a section

1. In the Survey editing area click **Edit survey**
2. Click **Add section**
3. A section is given a section number, e.g. Section 1
4. Type in your own label in **enter a section name**, e.g. *Starters course questions*
5. The label serves to support you as a survey Administrator and is not visible to the survey voter
6. You can add info pages and questions to a section
7. You can move info pages and questions within a section using drag and drop
8. You cannot move info pages and questions into a different section
9. You can change the order of sections by dragging them up and down the list
10. At the end of a section there is a drop down field for you to decide what action you would like the user to take at the end of the section
11. Create a **Single select** question with a section and click **Edit**
12. Below an answer option you will see the text **When this option is selected**
13. The first drop down allows you to select, **Continue to next question**, **Skip to section 'x'** or **Submit survey**

14. When selecting the **Skip to section** option, a new drop down menu appears. You can now select the section you wish to skip to
15. Click **Save question**
16. Click **Close**

Skip logic overview

1. Select the survey in the Survey List
2. The survey outline is presented in the Survey editing area
3. The survey outline shows you how the questions and sections are organised
4. This view can be very helpful in identifying errors in your survey structure

For further RIX EasySurvey support, please visit;

<https://rix-wiki-help-desk.groovehq.com/help> for support articles and to raise a support ticket.

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