

Survey Manager (Apache) Manual

Rev 0.1

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1. Introduction

The Survey Manager is a powerful web survey tool that allows you to generate flexible surveys.

You can see an example of a survey here :

<http://www.deliverytoolkit.com/sm-apache-demo>

You can see the product page here :

<http://www.focul.net/sm>

You can see the OpenNTF Apache Project here :

<http://www.openntf.org>

2. Versions

The Survey Manager comes in 3 versions :

- Survey Manager Pro
- Survey Manager Lite
- Survey Manager Open Source

2.1. Survey Manager Pro

This version is a fully supported application available on a subscription or outright purchase basis. It provides the following additional features :

- Fully Supported
- Integrates with other systems such as CRM
- Allows surveys to be tracked by person
- Supports multi-lingual surveys.
- Exports to Excel
- Automatically Generates Pivot Tables and Charts in Excel

2.2. Survey Manager Lite

This is a simpler but fully supported version of the application. There is no charge for the application and an annual support agreement is available.

2.3. Survey Manager Open Source

This is an Open Source version of the application distributed under the Apache licence through OpenNTF.org.

We can provide ad-hoc support to this version but we would recommend one of the two options above if you require a supported product.

3. System Components

3.1. Question and Phrase Bank

In order to make it easier to manage surveys the system has a bank of questions or phrases that are defined centrally and then added to individual survey templates.

This approach means that :

- Less effort is required to prepare questions for different surveys
- There is less spell and grammar checking to do
- There are lower translation costs
- The style of the language is consistent
- Responses to the same question can be aggregated across multiple surveys
- The cost of translation is reduced (see PRO version for multi-lingual capability)

3.2. Survey Templates

Each survey has a Survey Template. The survey template contains the phrases (introduction, section headings, thank you block and the available languages.

3.3. Survey Responses

There are two types of response documents :

The Response Header Documents
The individual Question Response Documents

3.3.1. The Response Header Document

For each survey that is created there is an umbrella document called the response header. This document then contains a number of Individual Response Questions.

3.3.2. Individual Question Response Documents

There is an Individual Question Response for each question created in a survey. Using individual documents allows the responses to individual questions to be compared across multiple surveys and in multiple languages.

3.4. Application Profile (PRO Version Only)

The Applications Profile is a configuration document that can be used to link The Survey Manager to a CRM type system such as our Contact Manager Application. This allows survey responses to be tracked at managed per recipient. This profile is normally set up when the system is installed.

4. How the system works

1. The survey owner either creates or re-uses some existing questions and phrases (introduction etc..) in the Question / Phrase Bank.
2. The survey owner then creates a new Survey Template.
3. The web link is then sent to the survey participants (this may be done via the Contact Manager Application).
4. If the Survey was sent via the Contact Manager application the system may create a blank survey response documents immediately otherwise the survey response documents will be created when the users first click on the web link.
5. If the survey response documents were pre-created by Contact Manager then you will be able to see the whether each individual has completed their survey.

6. Once the recipients have completed their survey you can see the responses. These can be examined singly or across multiple surveys.

5. Integration with other systems and tracking individual responses (PRO version only)

Note : Appendix A covers integration in more detail

Survey Manager Pro contains some very rich functionality which allows you integrate the web survey tool into other systems such as your CRM system and then track the individual responses.

Survey Manager Pro includes a free entitlement to our Contact Manger for Web Surveys product. We will use this as an example to demonstrate how Contact Manager Pro can be integrated with other systems.

6. Setting up a Web Survey

6.1. Questions

6.1.1. Check what questions are already available

Check what questions are already available and what languages they are available for. Make a note of their category and reference codes.

6.1.2. Creating new questions (if required)

- Open the Question / Phrase Bank
- Click on Master Questions
Master Questions are those in the default language
- Click on “New Question”
Create the question.

Question			
Language:	en : English	Active:	Yes
Question ID:	do you want SM	Question Type:	Check Box
Question Category:	Survey Tool Interest	Include Comments Box:	Yes
Question:	Would you be interested in a copy of this Survey Tool?	Question Alias:	like to receive SM
Responses:	Yes - the full Pro version Yes - the Lite version (free) Yes - please tell me how to get the open source version No Thanks	Response Aliases:	Pro Lite Open Source No

6.1.2.1. Language (PRO Version Only)

The first version of a question is always in the default language. Once this version has been created languages can be created in other languages.

6.1.2.2. Active

Questions can be made inactive if you do not want them to be used in future surveys

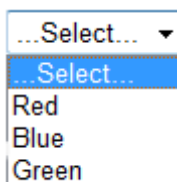
6.1.2.3. Question ID

Each question must have a unique ID

6.1.2.4. Question Type

There are 4 types of questions

- Free Text
- Drop Down



- Check Box

- Employees
- Customers
- Suppliers
- More than one of the above

- Radio Button

Yes

No

6.1.2.5. Question Category

It is very important to group your questions into categories so that it is easier to construct new surveys and also because these categories are used for reporting purposes.

6.1.2.6. Include Comments

This option allows you to include a text box for additional comments

Yes

No

Please add any comments:

6.1.2.7. Question

The Question is what the user will see when they come to complete the survey. You can add other languages once the default language (the masseter question) has been configured.

6.1.2.8. Question Alias

The Question Alias has two functions :

- It allows the question to be shortened for internal use e.g. when collated in graphical or tabulated form.
- This Question Alias – in the default language - is retained across all of the language versions making it easier for the questions to be understood when they are collated together.

6.1.2.9. Responses

There are the available responses that the user can give. You can add other languages once the default language (the masseter question) has been configured.

6.1.2.10. Response Aliases

The Response Alias has two functions :

- It allows the responses to be shortened for internal use e.g. when collated in graphical or tabulated form.
- This Response Alias – in the default language - are retained across all of the language versions making it easier for the questions to be understood when they are collated together.

6.1.2.11. Creating other language versions (PRO Version Only)

Once the default language question (the Master Question) has been created other language versions can be created using the button at the top of this Master Question.

6.1.2.12. Modifying Questions

If you modify a question then the new version will be visible in all new surveys.

6.2. Paragraphs

Paragraphs are used for the following :

- Survey Header Text
- Section Title and Introductions
- Survey Footers / Thanks

Check what phrases are already available and what languages they are available for. Make a note of their category and reference codes.

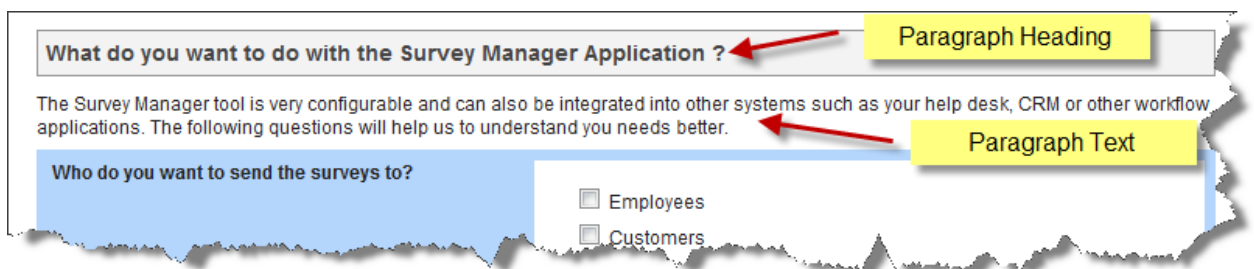
6.2.1. Creating new paragraphs (if required)

- Open the Question / Phrase Bank
- Click on Master Paragraphs
Master Paragraphs are those in the default language

Click on “New Paragraph”

Create the paragraph.

Paragraph / Section Details			
Language:	en : English	Active:	Yes
Paragraph ID:	<input type="text" value="Survey Use Case"/> <small>A unique identifier.</small>	Paragraph Type:	<input type="checkbox"/> Heading <input type="checkbox"/> Thank You <input checked="" type="checkbox"/> Question Block
Paragraph Heading:	<input type="text" value="What do you want to do with the Survey Manager Application ?"/>		
Paragraph Text:	<input type="text" value="The Survey Manager tool is very configurable and can also be integrated into other systems such as your help desk, CRM or other workflow applications. The following questions will help us to understand you needs better."/> <input type="text" value="The 'Insert E-mail Address' button at the top of the form will insert a return e-mail address link on the survey."/>		



- Paragraph ID

A unique reference

- Paragraph Type

A Heading can be used at the top of the Survey

A Thank you can be used at the end of the survey

A Question block can be used at the start of a series of questions

6.2.1.1. Creating other language versions

Once the default language question (the Master Paragraph) has been created other language versions can be created using the button at the top of this Master Paragraph.

6.2.1.2. Modifying Paragraphs

If you modify a question then the new version will be visible in all new surveys.

6.3. Survey Template

Choose Survey Templates from the main menu and then “New Template”

Template ID:	SCUL-8G6AWR A unique identifier.
Template Name:	
Template Category:	Questions should be grouped into relevant categories.
Template Owner:	Sean Cull/FoCul
Mail Principal:	The e-mail address that the survey e-mail will show as being sent from.
Base URL:	http://www.deliverytoolkit.com/Public/FDT/survey/survey.nsf/xp_f_survey.xsp The base URL for the survey link in the e-mail.
Survey URL:	http://www.deliverytoolkit.com/Public/FDT/survey/survey.nsf/xp_f_survey.xsp?s=&l=en change the l=en portion for different languages
Survey Readers:	The people / groups who are authorised to read completed surveys.
Application(s):	The applications (databases) that this survey can be triggered from.
Active:	Yes
Languages:	en : English
Default Language:	en : English
Comments:	

- Template Name

This is an internal name and is not visible to the web survey participants.

- Template Category

The Category is used in template administration and also in reporting

- Template Owner

The Template Owner field is used in reporting

- Mail Principal

The mail principal is the email address that can be included in the survey for people to respond to. This must be a valid email address in the format #####@###.### or similar.

- Base URL

The base URL is the URL of the survey application. This is configurable so that different domains can be used with different surveys e.g. focul.net or deliverytoolit.com

- Survey URL

The survey URL is automatically populated. Note the following :

- This url is not person specific. If you are using the Contact Manager application (or any other integrated system) each individual will have a unique web link
- This is the url for the default language

- Survey Readers

People who can see the survey results

- Applications

If the survey tool is linked to any CRM or similar applications then that system needs to be referenced here.

6.4. Adding Paragraphs and Questions

Use the buttons on the form to add the paragraphs and questions

6.5. Enabling other Languages

Once you have set up the Master Survey in the default language you can enable other languages using the “Add Language” button at the top of the form.

The system will identify any issues arising from incomplete language versions for the selected questions.

7. Sending a Survey

There are two ways to send a survey to recipients :

- A generic link
- A person specific link that can be tracked (PRO Version Only)

7.1. Sending a Generic Link

1. Copy the Survey URL from the survey template.
2. Paste this into your browser to make sure the survey works.
3. If the survey does not work then make sure that the template document has reached the “web facing server” which may be different from the survey that you are using.
4. Paste the survey URL into an email and send it to the survey participants.

7.2. Sending a person specific link (Pro Version Only)

7.2.1. Manual Process

To send a person specific link you need to include a unique parameter in the url for each person. If the base URL is

http://www.deliverytoolkit.com/Public/FDT/survey/survey.nsf/xp_f_survey.xsp?s=SCUL-8F8H5R&l=en

then the person specific URL would be

http://www.deliverytoolkit.com/Public/FDT/survey/survey.nsf/xp_f_survey.xsp?s=SCUL-8F8H5R&l=en&d=1234

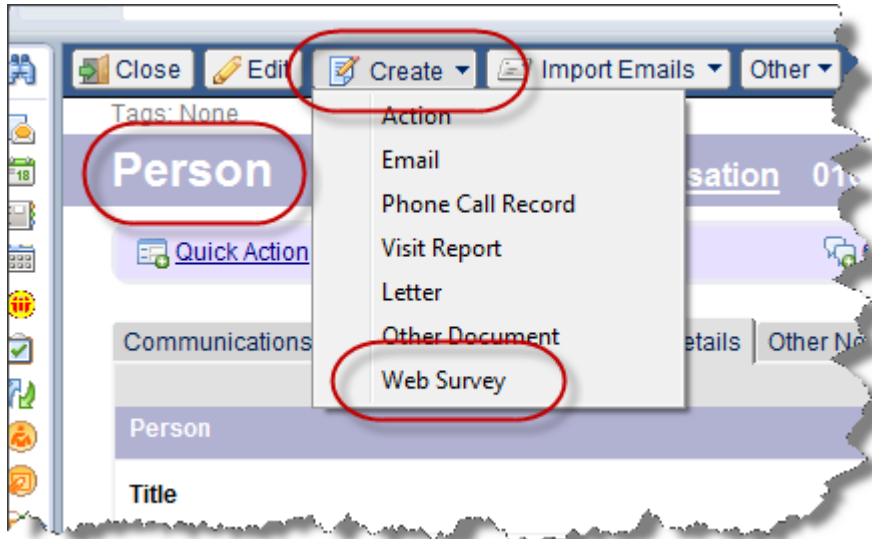
where the 1234 is unique to this person.

This process can be managed automatically by integrating the web survey tool with a CRM system. Web Survey Pro includes a free entitlement to use the FoCul Contact Manager (Web Survey) CRM system.

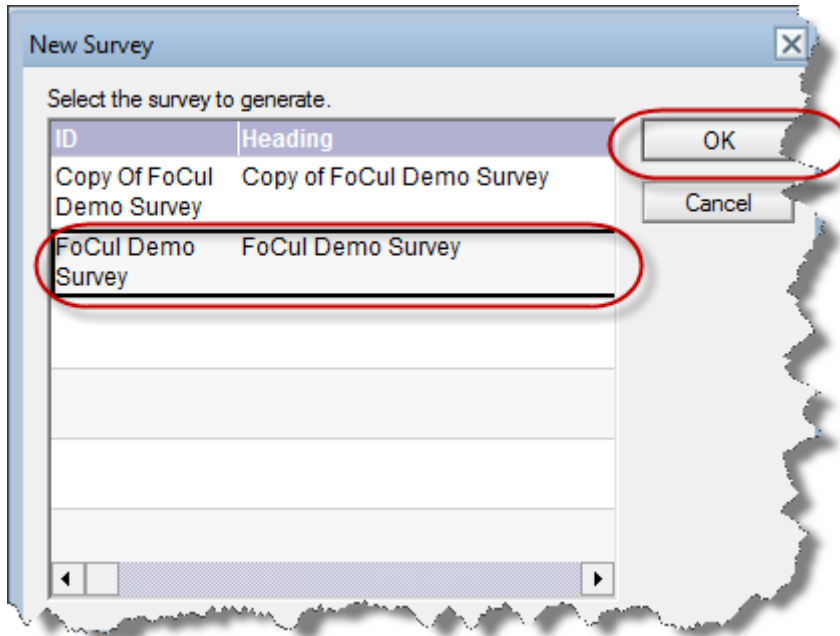
7.2.2. Using the Contact Manager Application

The [FoCul Contact Manager \(Web Surveys \)](#) application is free with Contact Manager Pro.

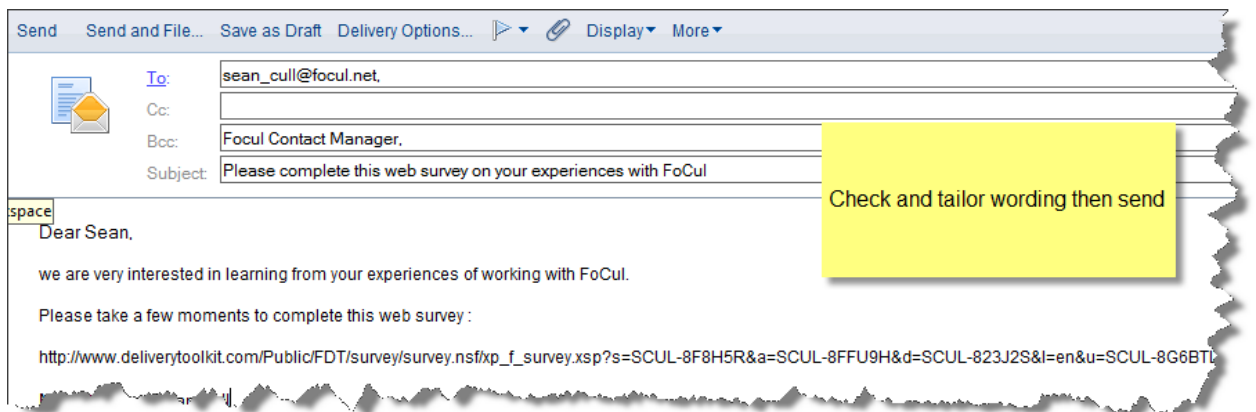
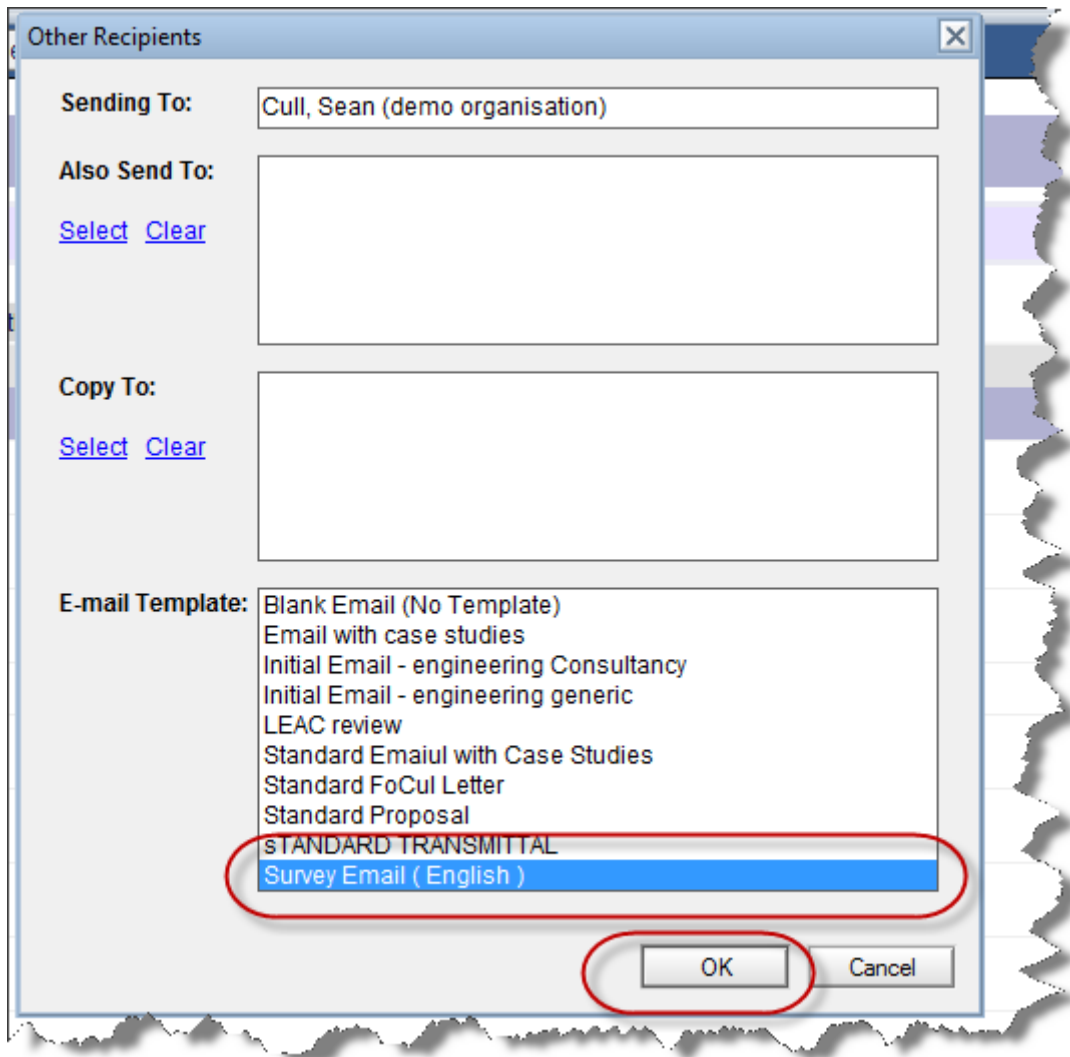
From the person record initiate a web survey.



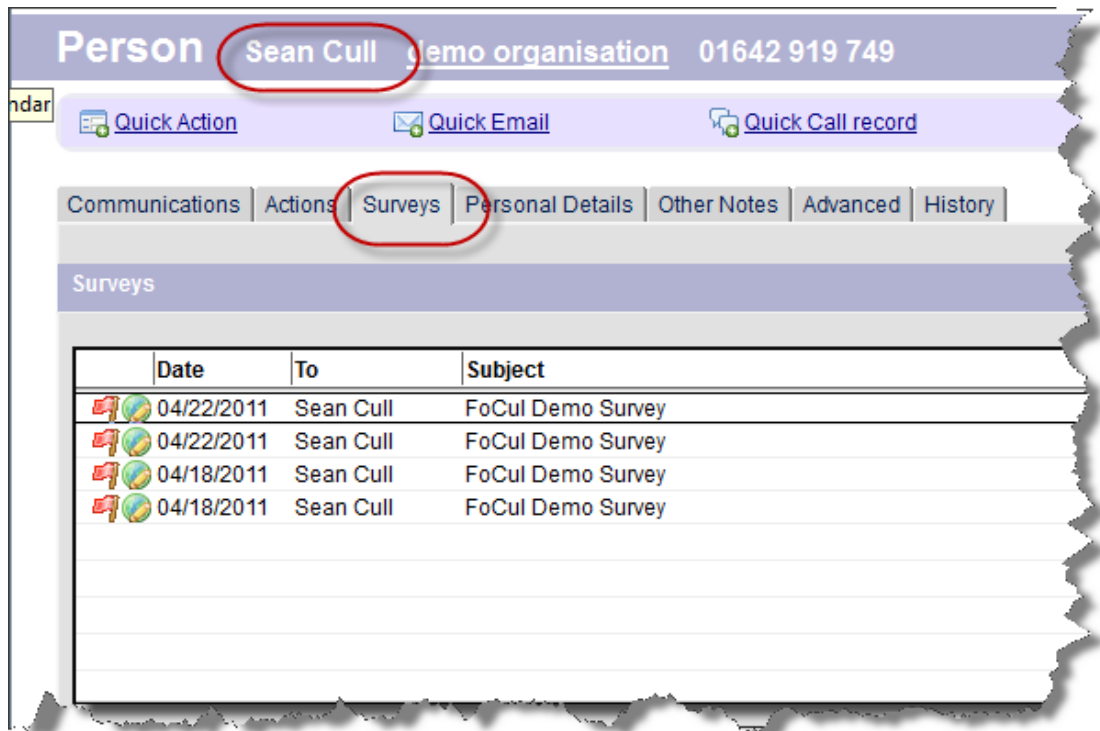
Choose the survey from the available list



Choose the email style to send



You can then track the survey responses within Contact Manager



8. Viewing the responses

The responses can be viewed in two ways :

- Directly in the Web Survey Manager Application
- In Contact Manager

8.1. *Directly in the Web Survey Manager Application*

The responses can be reviewed by complete survey or by individual question response.

12 Satisfaction				
12 Opinion of Notes				
04/12/2011	LCTY001	What is your opinion of Lotus Notes?	It could work better	
04/12/2011	LCTY001	What is your opinion of Lotus Notes?	It could work better	
04/14/2011	LCTY001	What is your opinion of Lotus Notes?	It could work better	
04/13/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/13/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/13/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/12/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/12/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/13/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/17/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/18/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	
04/21/2011	LCTY001	What is your opinion of Lotus Notes?	It works well	

8.2. In Contact Manager

A summary of the survey responses is also captured in Contact Manager under the person record.

This is useful because it is held with the rest of the persons details, correspondence etc.. but the best reporting functionality is in the Web Survey Manager application

9. Export

There are three ways to export data from the application.

- Using the Excel Export Functionality
- Via The Web
- Using “Copy as Table”

9.1. Using the Excel Export Functionality (Pro Version Only)

Clicking on the Export Menu option on the heft hand menu opens a list of available export templates. You can run the export by opening the template and clicking the run button at the top of the form.

When the export is triggered the following sequence takes place :

1. The spread sheet attachment is automatically downloaded and opened.
2. The specified data in Notes is pulled from the Notes views and pushed into the named data ranges in excel
3. The pivot tables and charts are refreshed

If you are setting up a new template the best thing to do is :

1. Create a new export template in Notes

2. Define the view and data ranges that you want to use
3. Create a new blank spread sheet
4. Add the data ranges to the spread sheet
5. Attach the spread sheet to the notes template
6. Run the export
7. Add the charts and pivot tables that you want
8. Delete all but the first row of data from the spread sheet
9. Replace the existing spread sheet attachment with this latest one

9.2. Exporting via the Web

Add the following string to the end of the survey url.

`/xp_f_export.xsp?openpage&ogin=1`

It should start just after the .nsf as shown below

http://www.deliverytoolkit.com/Public/FDT/survey/survey.nsf/xp_f_export.xsp?openpage&ogin=1

9.3. Exporting using “Copy as Table”

In any Notes view you can select documents in the left hand margin and then choose Edit > Copy as Table.

You can then paste this table into Notes, word or Excel

10. Appendix – Deploying Apache Version

1. Download the application from OpenNTF
2. Sign The application (when you are happy to trust the contents)
3. Open the application in Notes

4. Modify the settings shown below

Web Survey Manager (Apache)
www.deliverytoolkit.com

Survey Responses

Keywords

New Keyword

Keyword	Choices
Agent Log Recipient	support@focul.net
Application Owner	Joe Bloggs
Base URL	http://www.deliverytoolkit.com/publicfdt/sm/sm
FoCul Logging Level	10
Question Categories	Customer Satisfaction, Customer Service
Review Status Codes	Needs further attention, Complete
Template Categories	Customer Service, Potential Customers, Product
.Client Logo	
.Client Logo 40px	
.Optional application base colour for form Action Bars	FoCul_App_Base_Clr_Page.jpg
.Optional application base colour for pages	FoCul_App_Base_Clr_Page.jpg
.Optional application base colour for view Action Bars	FoCul_App_Base_Clr_View_ABar.jpg
.Optional application title override	Web Survey Manager (Apache)
.Optional gradient bar for top pages	FoCul_App_Base_Clr_grad.jpg
.Test Message Recipient	sean_cull

Server: Local

5. Go to the Templates view
Open the demo template
Save and Exit the Document to refresh it
Click the Preview Button