Portal Prodigy™
Surveys Feature in Detail

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www.portalprodigy.com

1.1 Introduction

PortalProdigy makes it quick and easy to conduct surveys, qualification exams or interviews over the web. Our online survey tool makes it easy to examine data immediately as it is collected. You can take a survey from concept to response within hours. Online surveying is lower cost than traditional methods such as face-to-face, telephone and mail, and eliminates interviewer effects. Conduct regular surveys of employees, customers vendors and others to assess overall satisfaction or to gain knowledge regarding specific areas of interaction. For example, event planners can verify fulfillment of event promises, get suggestions for improvement and determine probability of future attendance. Associations, employers and publishers conduct surveys to gain and test information on emerging trends and current topics. Follow surveys to transactions such a purchases provide timely information regarding a user's recent interaction experience. Surveys feature can be used in conjunction with Memberships feature.

Survey feature benefits include:

- Take a survey idea from concept to response within hours.

- Conduct surveys, qualification exams or interviews online.

- Surveys feature can be used in conjunction with other features such as Memberships to create acceptance qualification questionnaires.

- Create surveys with an unlimited number of questions using any combination of multiple choice, true/false, rating or text answer formats.

- Survey notices can be automatically broadcast to specified individuals, contact types or interest groups via email.

- Message recipients click on a link bringing them to the corresponding website survey page where they answer questions and submit their results.

- Survey results are stored by PortalProdigy and reported when needed.

- Load questions easily.

- Broadcasts survey notice to all categories of contacts linking them back to surveyor feature at the website.

- Scrutinize results privately or publish results publicly.

- Gets results in hours.

- Contacts can answer questions at their convenience from any Internet browser.

- Authorized administrators access the Survey Tool via the web and in minutes create a survey.

- Results are returned real time in a pre-determined format.

- Private surveys are secure and utilized to poll specific individuals or groups. Public surveys are open and can survey the general public.

Some of the components, fields and settings of the Surveys feature, discussed in detail in this chapter, are:

Survey Management Page
Add Icon
Browse Icon
Survey Details
Survey Title Field
Description
Allow Repetitive Selection
Field
Response Notification Email
Field
Question Details
Question Field –
Question Type Radio Buttons
Maximum Answers Field
Order # Field
Choices Field
Survey Record
Active Field
Expires Date Field
Chapter ID Field
Topic Selection Field
Level Selection Field
Private Selection Field

1.2 The Visitor Experience

Administration decides which surveys are available to the public and which are available to specific security groups requiring login. PORTALPRODIGY displays surveys and provides access in accordance with those settings. The survey feature can be set up so visitors see a survey link on the home page menu or surveys can be accessed via links included in email messages or on web pages.

If the survey link is activated on the organization's home page, visitors click on the link and access the survey list.

Surveys Topics

Art Buyers Survey

Art Dealer Survey

Art Education Survey

Art Supplies Manufacturers Survey

Artist Survey

Event Attendee Survey

Clicking on a survey title accesses the selected survey form which can be filled out and submitted in the visitor's browser.

The visitor clicks on the ● **Done** button and the survey answers are transmitted to the PORTALPRODIGY database.

1.3 Components

The following components are used to create and manage surveys.

1.3.1   Survey Management Page

The Survey Management Tools are accessed from the Site Administration Menu by clicking on the appropriate Surveys Icon located in the Content Management column.
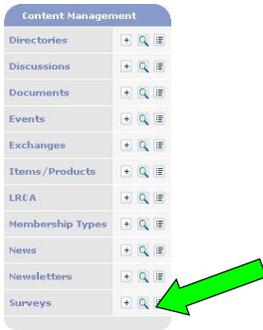
Click on the ➕ icon to access the Survey Management page.

➕ **Add Icon** - Activates the Add a New Survey function.

🔍**Browse Icon** - Accesses the Search for Surveys function.

1.3.2   Survey Management Page Survey Details

- **Survey Title Field –** The Administrator enters the title of the survey into the Survey Title Field. The title is displayed in lists on public portions of the site and, when clicked on by a visitor, opens a page which displays the entire survey
.
- **Description -** The Administrator enters a brief description, into the Description Field. The description is displayed on the visitors page at the top of the questionnaire just below the Survey Title..

- **Allow Repetitive Selection Field –** This field can be set to *Yes* or *No*. Setting the field to No prevents survey participants from submitting more than one set of answers.
   It is important to note that this feature will only work if the Private Field of the Record Detail is set to *Yes*. Since setting it to Yes requires the survey taker to login, thusly giving the system a way of knowing who took the survey. When a non-longed in visitor attempts to take a survey he will be prompted to login or signup. A new signup login automatically enters the visitor into the *User* security group. (Non–logged in visitors default to the *Visitor* security group). Setting the private security group to *User* for surveys meant for public participation can help prevent single visitors from multiple submissions and secure a record of the visitor's contact information.

- **Response Notification Email Field –** The Response Notification Email Field is used to indicate the email address of the individual that should be automatically notified of each time survey answers are submitted. For example, the survey chairperson. Each time a new survey questionnaire is submitted, an email message based on the selection in the Response Notification Template Field (on feature management page) will be sent to the email address entered into the Response Notification Email Field. The Response Notification Template is selected during the administrative setup of the feature and may be updated there on the Surveys Feature Management Page. The template selected in the Response Notification Template Selection Field indicates the message to be sent to the email address entered into the Response Notification Email Field when a completed survey questionnaire is submitted to PORTALPRODIGY.

1.3.3   Survey Management Page Question Details

- **Question Field** – The Administrator enters a survey question into this field. The question entered here will appear on the survey questionnaire displayed to visitors. After the first question is saved, PORTALPRODIGY adds another control form to the page as shown below. This control form permits the Administrator to navigate the survey questions by entering the question ID # into the Got To Question field, or clicking on the navigation links such as

.

- **Question Type Radio Buttons** – Each question requires one or more answers. PORTALPRODIGY survey feature supports the collection of multiple choice (includes True/False), short text and essay responses. The appropriate response form is selected by clicking on the Choice, Text or Memo radio buttons.

- **Maximum Answers Field** – This selection is only relevant if the Choice Question radio Button is selected. Generally, this is set to one meaning only one answer may be selected by the visitor. However, under certain conditions multiple answers might be desirable and in such cases the number may be set higher.

- **Order # Field** – This field controls the order in which questions are displayed to the visitor on the questionnaire.

- **Choices Field** – This selection is only relevant if the Choice Question radio Button is selected. The Administrator enters the list of possible answers into this field.

  If an Administrator attempts to edit this field after at least one visitor has submitted answers to the survey, the look and operation of this field changes slightly as shown below.

To update an answer using this field form, the Administrator must first click on the answer she wishes to edit and then click on the edit icon.

 Changing questions after answers have been submitted can skew results and only should be undertaken after careful consideration.

1.3.4   Survey Management Page Record

▪ **Active Field** – The Active Field can be set to *Yes* or *No*. When set to No, the survey will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search

results box is checked. It does not delete the record but tags the record so it will be filtered from display.

▪ **Expires Date Field** – The Expires Date Field provide for the input of a date, after which the survey will no longer be displayed on the visitor (public) portion of the website. It does not delete the record but tags the record so it will be filtered from display.

▪ **Chapter ID Field -** Indicates the chapter of the user who entered the discussion record. This field is applicable on multi-chapter versions of PORTALPRODIGY.

▪ **Topic Selection Field** – The Topics Field contains a selection list based on entries made on the Survey Topics Management pages. Topics determines which surveys are grouped together on the list displayed to visitors.

▪ **Level Selection Field** – The Level Field is applicable to multi-chapter synchronous installations of PORTALPRODIGY where levels, such as National, Regional, State and Local are used to filter the display of records.

- **Private Selection Field -** The Private Field can be set to *Yes* or *No*. Selecting *No* indicates that the discussion record may be displayed to all visitors. Selecting *YES* indicates that only visitors with appropriate privileges may view the discussion record and causes the Security Groups selection box to be displayed at the bottom of the Survey Management page. Clicking to check the corresponding check box(es) permits specified group members to view the discussion record on the public portion of the website.
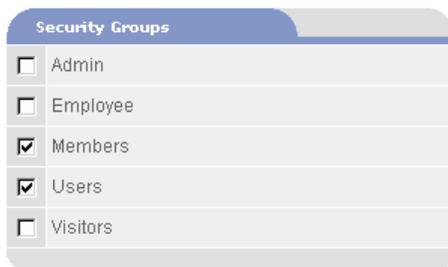
1.4 Feature Administration

Implementing the Surveys Features involves the following steps:

- Create a Surveys Auto Broadcast Template
- Prepare a Surveys Response Notification Template
- Prepare a New Survey Announcement Template
- Activate the Events Feature
- Add Survey Link to Side Menu
- Create Survey Topic Categories
- Enter Surveys

1.5 Tutorials

The following tutorials describe how to create and manage surveys and to perform related tasks.

1.5.1   Create a Surveys Auto Broadcast Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The Auto Broadcast message is delivered when a visitor submits a survey questionnaire if the feature is turned on in Survey Features Management. Variable Data from the specific event is inserted into the template and delivered to the registrant for the purpose of confirming registration.

Sample Events Broadcast Template

1.5.2 Prepare a Surveys Response Notification Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The Response Notification message is delivered when a visitor registers for a specified event if the feature is turned on for that event. Variable Data from the specific event is inserted into the template and delivered to the recipient designated in the

 field on the Event

Management page for the specific event.

Sample Response Notification Surveys

1.5.3   Prepare a New Survey Announcement Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The New Survey Announcement message is delivered when an Administrator clicks on the Broadcast button on a specific Survey's Management page and then selects the template and the appropriate recipients. Variable Data from the specific survey is inserted into the template and delivered to the recipient list for the purpose of announcing the survey.

Sample Survey Notification Template

1.5.4   Activate the Events Feature

Click on the Features Management link in the Site Management column of the Administration Menu.

Click the box next to the Surveys label on the Features Management page to activate the Surveys Feature. Click on the **Surveys** link to access the Events Feature Management page.

Surveys Feature Management Page

- **Select an Auto Broadcast template -** The Auto Broadcast message is delivered when a visitor submits a survey questionnaire if the feature is turned on in Survey Features Management. Variable Data from the specific event is inserted into the template and delivered to the submitter for the purpose of confirming the submission.
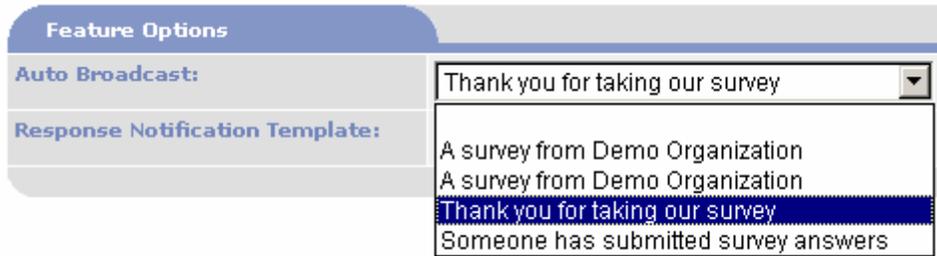
- **Select a Response Notification Template** - The Response Notification message is delivered when a visitor submits a survey questionnaire. Variable Data from the specific survey is inserted into the template and delivered to the recipient designated in the field on the Survey Management page for the specific survey.

Sample Survey Response Notification Template
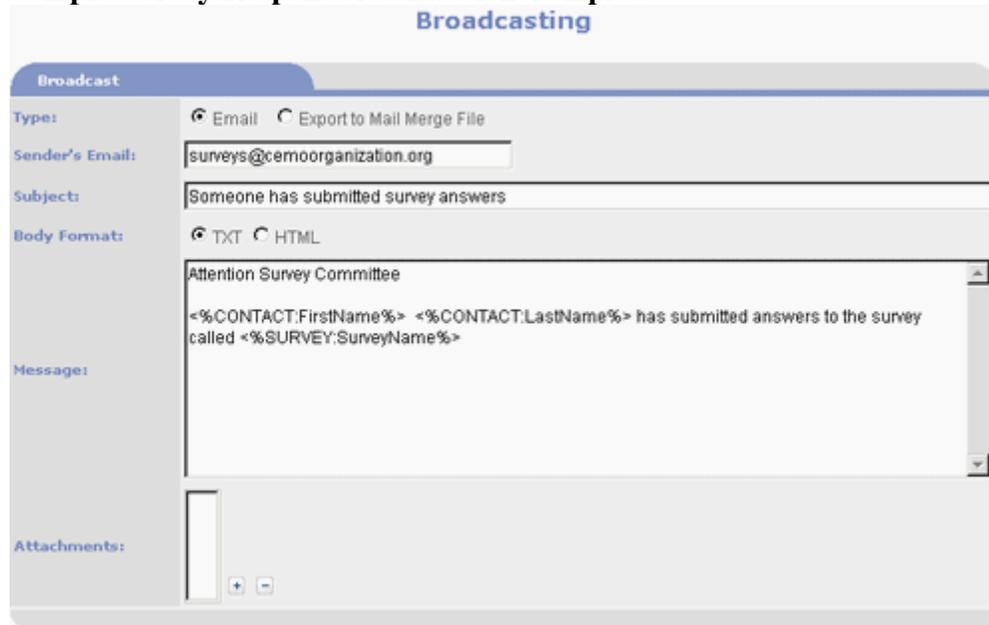
1.5.5   Add Survey Link to Side Menu

Click on the Features Management link in the Site Management column of the Administration Menu.
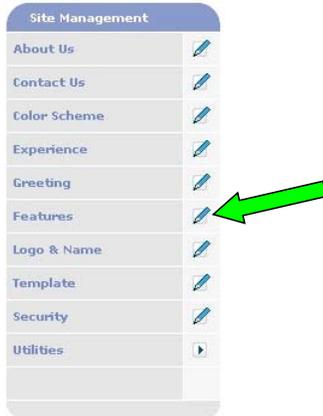
Click on the **Menu Builder** link located on the Features management page.

Click on the Search button on the Search for Menus page and click on the menu title for the menu you wish to add the events link.
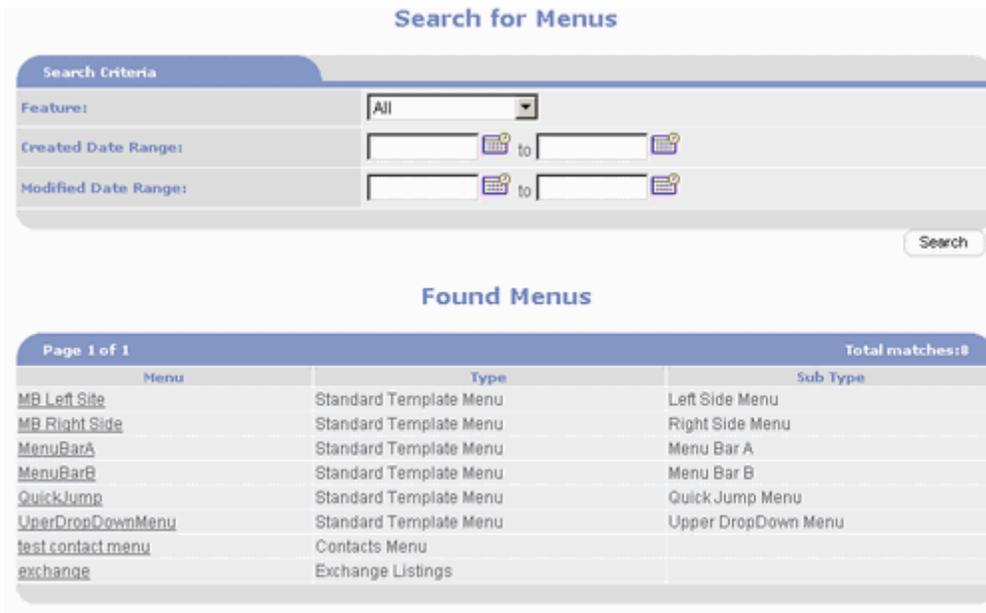
Click the Add Menu Item button on the Menu Builder page. And enter the desired values.
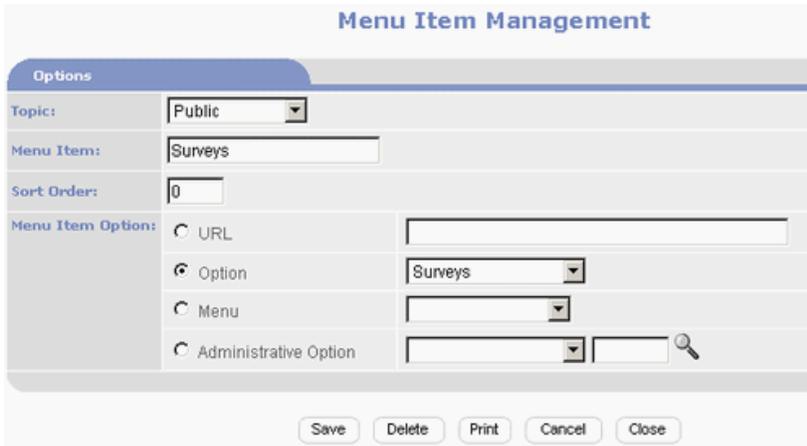
See the chapter titled Menu Builder in Detail for more specifics regarding the setup of links on menus.

1.5.6   Create Survey Topic Categories

Topic categories should be used if the user organization conducts large numbers of surveyss. The Topic categories can help organize the display of long lists of surveyss based on areas of interest. Access the Topics Management page by clicking on the **Topics** link on the Surveys Features Management page.

Add new topics by clicking on the **Add New Topic** link

Topics can be selected when entering Surveys so that they organize for display.

Surveys Topics

General Public Surveys

Art Education Survey

Member Surveys

Art Supplies Manufacturers Survey

Artist Survey

Event Attendee Survey