How To Guides – Survey Launch Tool

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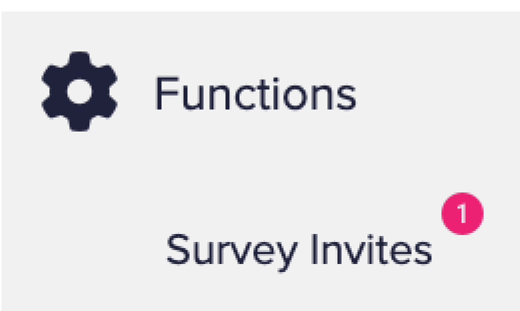
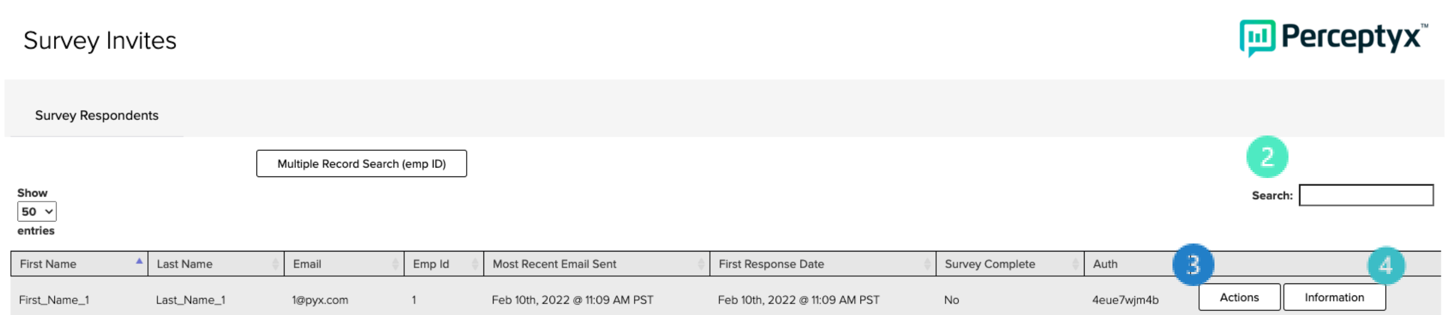
Overview

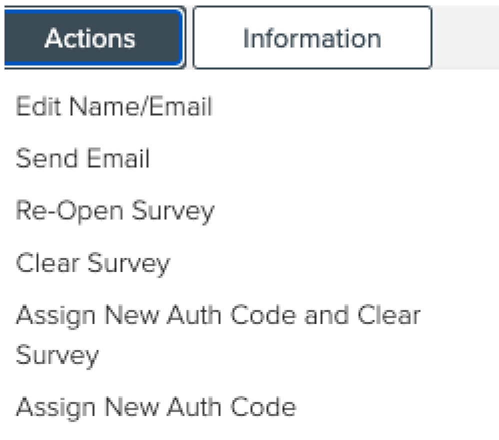
1. **Survey Invitees** – Click to Survey Invites.
2. **Search Record** – Click to Search to find an existing user record.
3. **Actions** – Click to look at survey level actions.
4. **Information** – Click to find survey information.





Actions Button

Use this button to edit an employee's basic information, send and email invite, open or clear an employee’s survey, or assign them a new link.

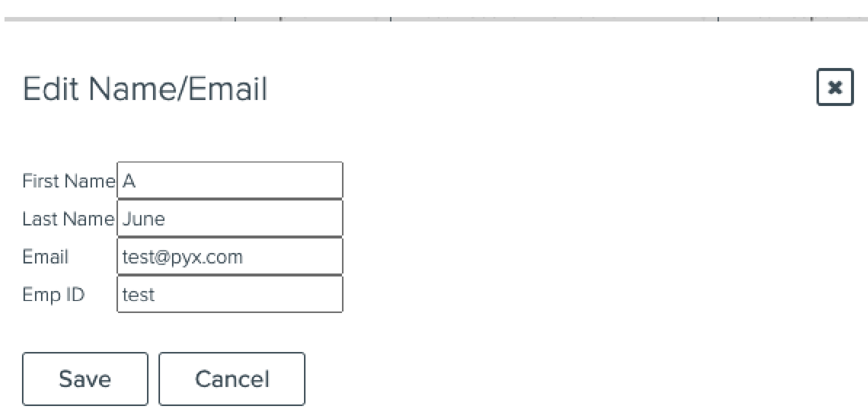


Select from the following areas:

- **Edit Name/Email:** Alter the participant’s name, email or employee id number.
- **Send Email:** Send and email invitiaon or a reminder email during the live survey event.
- **Re-Open Survey:** Allows a participant that has completed their survey to access their survey again to update or review responses. They must click submit again.
- **Clear Survey:** Removes all participants previously submitted responses. They cannot get those responsee back once the survey has been cleared.
- **Assign New Auth Code (/and Clear Survey):** Deletes the previous unique link completely, and create a brand new unique participant link for access. If cleared, this also deletes all previously submitted responses, regardless if they completed the survey or not. (Helpful when a unique link was forwarded to other team members in error.)

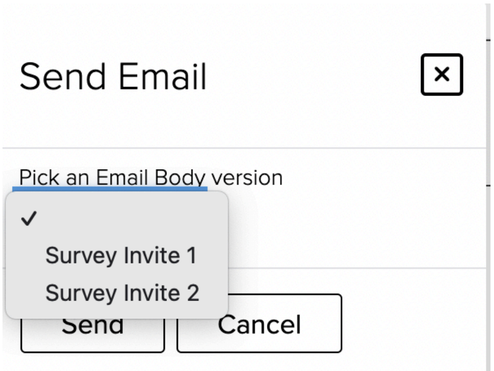
Editing a Name/Email

1. Select the **Actions** button next to an existing record.
2. Edit the information as listed below to update the **first name, last name, email, or employee id** of a participant. Each of these fields are required.
3. Click **Save**.



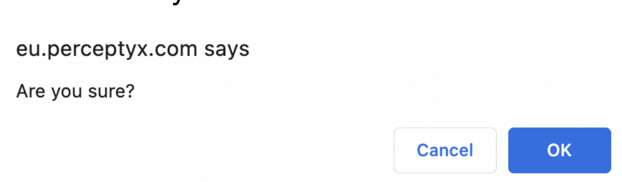
Send Email

1. Select the **Actions** button next to an existing record.
2. Choose **Send Email.**
3. **Select** from the drop down list of invitation and reminder emails that can be sent.
4. Click **Send**
5. A pop up will appear saying ‘Are you sure?’. Click **OK**.



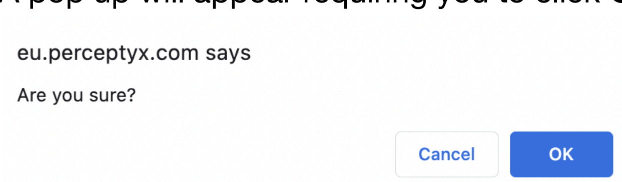
Re-Open Survey

1. Select the **Actions** button next to an existing record.
2. Select **Re-Open Survey**.
3. A pop up will appear requiring you to click **OK** and confirm you would like to reopen the survey.



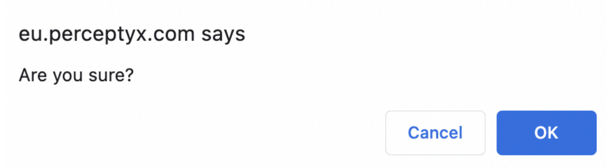
Clear Survey

1. Select the **Actions** button next to an existing record.
2. Select **Clear Survey**.
3. A pop up will appear requiring you to click **OK** and confirm you would like to clear the survey.



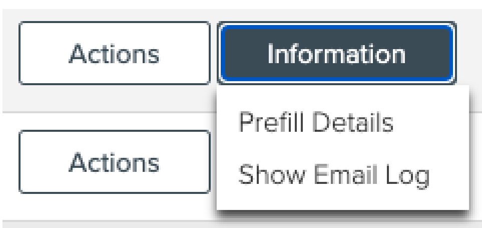
Assign New Auth Code (/and Clear Survey)

1. Select the **Actions** button next to an existing record.
2. Select **Assign New Auth Code and Clear Survey**.
3. A pop up will appear requiring you to click **OK** and confirm you would like to clear the survey.



Information Tab

See employees' demographics or look at their email sent history.

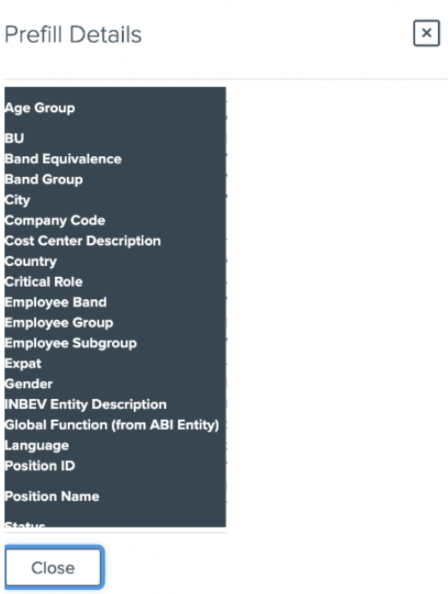


Select from the following areas:

- **Prefill Details:** Used to see demographic information of the employee.
- **Show Email Log:** See the history/log of emails that have already been sent to the participant.

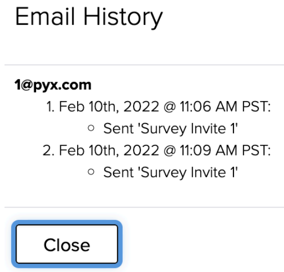
Prefill Details

Select the **Information** button next to an existing record. Then, select **Prefill Details.** Here you will see data assigned to the participant during the survey set up (example below).



Show Email Log

Select the **Information** button next to an existing record. Then, select **Show Email Log.** This will show all invitation and reminder emails sent to the participant through the platform. (However, this will not show if the email bounced or any errors occurred).



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