

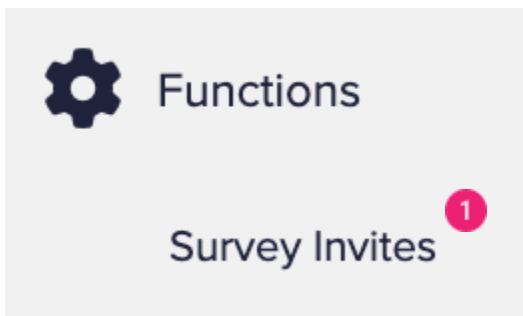
How To Guides – Survey Launch Tool

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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.



Survey Invites

Survey Respondents							
<div> <div>Multiple Record Search (emp ID)</div> <div> <div>2</div> <div>Search: <input type="text"/></div> </div> </div>							
<div> <div>Show</div> <div>50</div> <div>entries</div> </div>							
First Name	Last Name	Email	Emp Id	Most Recent Email Sent	First Response Date	Survey Complete	Auth
First_Name_1	Last_Name_1	1@pyx.com	1	Feb 10th, 2022 @ 11:09 AM PST	Feb 10th, 2022 @ 11:09 AM PST	No	4eue7wjm4b
							<div> <div>3</div> <div>Actions</div> </div> <div> <div>4</div> <div>Information</div> </div>

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.

Actions	Information
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Edit Name/Email

Send Email

Re-Open Survey

Clear Survey

Assign New Auth Code and Clear Survey


Assign New Auth Code

Select from the following areas:

- **Edit Name/Email:** Alter the participant's name, email or employee id number.
- **Send Email:** Send and email invitation 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 responses 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**.

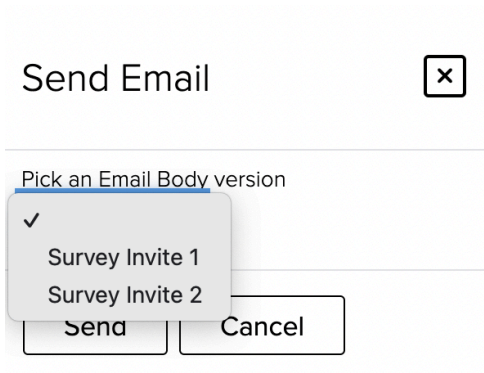
Edit Name/Email	
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First Name	<input type="text" value="A"/>
Last Name	<input type="text" value="June"/>
Email	<input type="text" value="test@pyx.com"/>
Emp ID	<input type="text" value="test"/>

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
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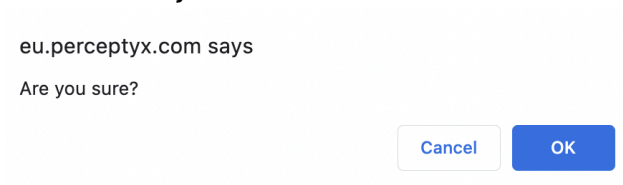
Send Email

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**.



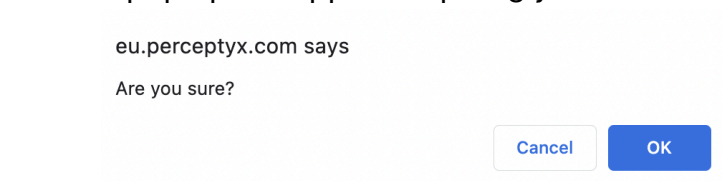
Re-Open Survey

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.

eu.perceptyx.com says

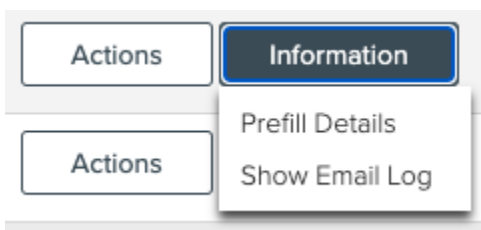
Are you sure?

Cancel

OK

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).

Prefill Details



Age Group
BU
Band Equivalence
Band Group
City
Company Code
Cost Center Description
Country
Critical Role
Employee Band
Employee Group
Employee Subgroup
Expat
Gender
INBEV Entity Description
Global Function (from ABI Entity)
Language
Position ID
Position Name
Status

Close

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).

Email History

- 1@pyx.com
1. Feb 10th, 2022 @ 11:06 AM PST:

Sent 'Survey Invite 1'
2. Feb 10th, 2022 @ 11:09 AM PST:

Sent 'Survey Invite 1'

Close

Bottom of Form