

Surveys

Using the voice of customer capabilities provided by CardioLog Analytics you can create online surveys for all visitors or specific target segments to learn more about your users in real time.

- Create surveys based on either single answer, write-in answer, multiple choice or required input fields, and create dynamic responses based on the answers provided.
- Deliver a defined surveys to specific visitor segments.
- Direct your visitors to further action, depending on their survey response.

In the main **Surveys** window under **Visitor Engagement**, you can view the status of each survey and filter surveys by status (active / inactive), by type (initial / consecutive) and by visitor segment.

The screenshot shows the 'Surveys' main window in CardioLog Analytics. The top navigation bar includes 'CARDIOLOG ANALYTICS' and a user profile 'knowledge base | Connected As VM1A3B71E\Administrator'. The left sidebar contains navigation items: Report Center, Analysis Center, Optimization, Acquisition, Visitor Engagement (with sub-items: Behavioral Targeting, Message Bars, Surveys), Settings, and Administration. The main content area is titled 'Surveys' and features a filter input field and a 'Show surveys' dropdown menu with options: All, Active, Inactive, Initial, Consecutive, and By Segment. An 'Add Survey' button is located in the top right corner. Below the filter is a table listing five surveys:

Survey Name	Status	Views	Responses	Reports	Preview
Ruby's Survey	Active	180 Views	12 Responses	Reports	Preview
Jonathan's survey	Inactive	2 Views	0 Responses	Reports	Preview
Campaign Survey	Inactive	4 Views	2 Responses	Reports	Preview
Rotem's survey	Inactive	2 Views	0 Responses	Reports	Preview
Jake's Survey	Active	0 Views	0 Responses	Reports	Preview

Surveys Main Window

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How to Create a Survey

1. In the Surveys main window click **Add Survey** from the upper right hand corner of the main window, and you will be presented with a list of options.

New Survey Dialog

2. The General Details dialog requires a basic set of information about the survey
 - a. Enter a **Survey Name**.
 - b. Decide **Where should this survey appear?** and select the webpage or pages where the survey will appear using the Object Explorer. You can enter * to display the survey on all pages of your SharePoint environment.
 - c. Selecting **Show survey on all page URLs beginning with this URL address** will display the survey on all pages defined.
 - d. Use **Survey Status** to choose whether or not to activate the survey immediately.

General Behavior

Who should be prompted to take this survey?

Anyone ▼

Show as long as visitor did not answer or closed survey

Show only once per visitor

Show survey even if visitor already answered

Show survey even if visitor already answered (once per visit)

When should this survey be prompted?

When the visitor is part of 'Anyone'

When the visitor is part of 'Anyone' and he/she moves the cursor towards the browser close button

When the visitor is part of 'Anyone' and he/she scrolls down the page

What do you want to have on the submit button?

How do you want the survey to appear?

Opened ▼

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Survey General Details dialog

3. In the General Behavior dialog choose **Who should be prompted to take this survey?** Click the drop down menu to select the **visitor segment** you would like to view the survey. Select "Anyone" to display the survey to all visitors.

Select how often to show the survey:

- **Show as long as visitor has not answered or closed survey** - The survey will remain open until the visitor completes or closes it.
- **Show only once per visitor** - The survey will appear on the first relevant page the visitor navigates to on your site, and not again.
- **Show survey even if visitor already answered** - The survey will persist on all selected pages regardless of the user's actions
- **Show survey even if visitor already answered (once per visit)** - The survey will be presented on the first relevant page a user visits, every time they visit your site.

Select **When should this survey be prompted?**

- When the visitor is part of the 'selected visitor segment'
- When the visitor is part of the 'selected visitor segment' and he/she moves the cursor towards the browser close button
- When the visitor is part of the 'selected visitor segment' and he/she scrolls down the page

Enter text for **What do you want to have on the submit button?** By default the survey submit button text is "Submit"

How do you want the survey to appear? Choose either opened or closed for for the initial appearance on a page. The user can always open or close the survey manually.

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new

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Submit.

Save

Survey opened



Survey closed

General Behaviour

Who should be prompted to take this survey?

Anyone

Show as long as visitor did not answer or closed survey

Show only once per visitor

Show survey even if visitor already answered

Show survey even if visitor already answered (once per visit)

When should this survey be prompted?

When the visitor is part of 'Anyone'

When the visitor is part of 'Anyone' and he/she moves the cursor towards the browser close button

When the visitor is part of 'Anyone' and he/she scrolls down the page

What do you want to have on the submit button?

How do you want the survey to appear?

Opened

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Preview

Save

Survey General Behaviour dialog

- In the Appearance dialog, select the survey **Theme**, color **Palette** and **Position** as you'd like it to appear on your site. Choose Default-RTL for text that includes language characters that are read from right to left, such as Arabic or Hebrew.

Appearance

Theme:

Palette:

Position:

Appearance dialog

▼

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new site?

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Submit.

Survey Default Theme with Dark Palette

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new site?

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Submit.

Survey Basic Theme with Blue Palette

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new site?

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Submit.

Survey Basic Theme with Yellow Palette

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new

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Submit.

Survey Designed Theme with Light Palette

Did you find what you were looking for?

Yes

No

Some of it

What do you think of our new site?

It's great!

It's ok.

I don't like it.

How can we improve our new site?

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Submit.

Survey Designed Theme with Dark Palette

- b. From the Theme menu, you may choose **Custom** and a complete set of options for changing the graphics of your survey will become available. Select the text style and color palette as it will appear on to your users. Select simple colors from the drop down menu, manually enter your choice using the color selector, which appears when you begin to type in a **hex color** identifier text box. The color selected will appear as a preview in the relevant text box.

Appearance

Theme: Custom ▾

Palette: Light ▾

Position: Right ▾

Body Color: white ▾ or choose hex color: FFFFFFFF

Footer Color: white ▾ or choose hex color: FFFFFFFF

Border Color: #dcd9d9 ▾ or choose hex color: DCD9D9

Arrow Background: white ▾ or choose hex color: FFFFFFFF

Font Family: Arial ▾

Font Size: 12px ▾

Button Color: white ▾ or choose hex color: FFFFFFFF

Button Background: #9ca3fd ▾ or choose hex color: 9CA3FD

Button Height: 40px ▾

Button Width: 200px ▾

Powered By Color: #337ab7 ▾ or choose hex color: 337AB7

Columns Footer: 1 ▾

[<< Back to dashboard](#) [Preview](#) [Save](#)

Survey Appearance Custom Options

Appearance

Theme: Custom ▾

Palette: Light ▾

Position: Right ▾

Body Color: C4FFCB ▾ or choose hex color: C4FFCB

Footer Color: DCC7FF ▾ or choose hex color: DCC7FF

Border Color: 000000 ▾ or choose hex color: 000000

Arrow Background: FF8FD8 ▾ or choose hex color: FF8FD8

Font Family: Helvetica ▾

Font Size: 12px ▾

Button Color: 000000 ▾ or choose hex color: 000000

Button Background: #9ca3fd ▾ or choose hex color: 9CA3FD

Button Height: 40px ▾

Button Width: 220px ▾

Powered By Color: 265A87 ▾ or choose hex color: 265A87

Columns Footer: 1 ▾

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Did you find what you were looking for?

Yes

No

Not entirely

SUBMIT

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ave

Survey Appearance Custom Options with Custom Color Preview

4. In the Question dialog, begin by entering the **Question** as you'd like it to appear,

Surveys

How can we improve our new site? Up Down Delete

Question:

How can we improve our new site?

Enable segmentation based on this question ?

Required

Description: Place before question ▼

Answer type:

Text-based answer - free response ▼

Question Dialog

Select **Enable segmentation based on this question** if you would like to create a new [visitor segment](#) for all visitors who enter an answer to the question.

Select **Required** to specify that the question must be answered before submitting the survey. Required questions will be marked with an asterisk (*).

Add an optional **Description**. From the adjacent drop-down menu you can choose **Place before question**, **Place after question**, or **Hide description** to decide where the Description text will be displayed to the user.

Select the **Answer type** from the following available options:

(1) **Text-based answer - free response**: The visitor enters their own answers within a text box.

What is the purpose of your visit to our website?

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Text-based Answer

(2) **Write-in answer**: Defined as either short text, Email, Phone, or Number. The visitor will be presented with a single-line text box.

Name: *

Phone Number: *

Email: *

Age: *

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Write-in Answer

(3) **Single answer - radio button:** The visitor may choose a single, predefined answer from a list of two or more answers that you enter. Answer options will not appear until "Single Answer - radio button" is chosen.

What is the purpose of your visit to our website?

Get more info on your product

Check out personalization

Demo

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Single Answer

(4) **Multiple answer selection - checkboxes:** The visitor may select one or more answers from a list of custom answers that you predefine. Answer options will not appear until "Multiple answer - checkboxes" is chosen.

What is the purpose of your visit to our website?

Get more info on your product

Check out personalization

Demo

Other

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Multiple Answer

Click on **Add another answer** to add a predefined answer to a single or multiple answer question.

Select **No explanation**, **short explanation**, or **long explanation** to add an explanation text box that will be displayed after the visitor selects the answer.

Click on **Delete** to delete an answer.

Answer type:

Multiple answer - checkboxes ▼

Answers:

It's great!	No explanation ▼	Delete
It's ok.	No explanation ▼	Delete
I don't like it.	No explanation ▼	Delete

[Add another answer](#)

Answer Type Dialog

Were you able to find the information you were looking for?

Yes!

Most of it.

No.

Powered by CardioLog **Right On!**

Short Explanation

Were you able to find the information you were looking for?

Yes!

Most of it.

No.

Powered by CardioLog **Right On!**

Long Explanation

Note: Once a survey is saved there is no way to modify the answer type.

- a. Click on **Add Question** In order to add multiple questions. Drag and drop the Question, or click **Up** or **Down** in order to rearrange the order of the questions. Click on **Delete** in order to delete a question.

⊕ Did you find what you were looking for?	Up Down Delete
⊕ What do you think of our new site?	Up Down Delete
⊕ How can we improve our new site?	Up Down Delete
Add Question	

Multiple Questions

- b. You may include a dynamic thank you message that appears once a survey is submitted that depends on the visitor's response.

Thank you message behavior

Show the same thank you message for all answers

Show the survey results

Redirect the user to a different page

Redirect the user to a different survey: Choose survey ▾

Show a conditional thank you message (based on visitor's response):

<< Back to dashboard Delete Flush Copy Preview Save

Thank You Message Behavior Dialog

Show the same thank you message for all answers allows you to enter a thank you message text and the duration in seconds that the message will appear to the user. You may also execute a JavaScript code simultaneously by entering the script in the provided area. For example, you can create a dialog for inviting visitors to register for an event that includes required fields such as the visitor's name and email.

Upcoming webinar: Reserve your spot!

"Search as Application:
Much more than Technology",
with Agnes Molnar, SharePoint MVP

Will be held on May 21, 2014

First Name: *

Last Name: *

Email Address: *

Organization *

Powered by CardioLog Register Now

Thank You Message Example: Register to a Webinar

By selecting **Show the survey results**, the answers that other users have provided will appear after the visitor submits the survey.



Survey Results

Select **Redirect the user to a different page**, to have the visitor redirected to a new webpage after submitting the survey. Enter the page URL in the text box, or select the adjacent browse button (...) to use the Object Explorer. Enable **Open in a new window** to open the page in a new browser window or tab depending on the user's browser preferences.

Thank you message behavior

- Show the same thank you message for all answers
- Show the survey results
- Redirect the user to a different page

Open in a new window
- Redirect the user to a different survey: ▼
- Show a conditional thank you message (based on visitor's response):

Thank you message behavior dialog

Select **Redirect the user to a different survey** to present the visitor with another survey after pressing submit. Choose the second survey you would like to display from the drop-down menu. For more information see "[How to create a multi-page survey](#)".

Select **Show a conditional thank you message (based on visitor's response)** to display different thank you messages, include JavaScript actions, redirect the visitor to a different page, or redirect the user to additional survey questions based on their response. Choose a single or multiple answer question that you would like to prompt a conditional response from the drop down menu. Then enter in the appropriate options as described above for each of the appropriate answers.

Thank you message behavior

- Show the same thank you message for all answers
- Show the survey results
- Redirect the user to a different page
- Redirect the user to a different survey: Choose survey ▼
- Show a conditional thank you message (based on visitor's response):
 - Select the question you want to use for your conditional thank you message: 1st Question ▼

Default

- Show the following message:

Thank you.
- Show the thank you message for seconds
- Execute the following JavaScript code

// JS code goes here...
- Redirect the user to a different survey: Choose survey ▼
- Redirect the user to a different url: ...

Conditional Thank You Messages

5. You may **Preview** or **Save** the survey you have created. You may use the Preview feature throughout the design of your survey without affecting any changes. It is also available in the main Surveys UI once the survey has been created.

How to Add Personal User Details to a Survey

You can include personal details about the current visitor within the survey questions and descriptions automatically by using dynamic user category labels. A user database will need to be configured previously. In order to import information from user categories into the tool see [User Category Management](#).

1. In the Survey question or description dialog, include a dynamic label with a user category name in brackets such as [Department] to directly address your users. To find out which user categories are available, use [visitor segments](#) to find all known user categories by creating a new visitor segment and selecting the advanced segment details dialog, under user information.

Surveys

Hi [Display Name], do you want to get more out of SharePoint?

Question:

Enable segmentation based on this question ?

Description:

Answer type:

Answers:

<input text"="" type="text" value="No explanation"/>	Delete	
<input type="text" value="No thanks, not right now"/>	<input type="text" value="No explanation"/>	Delete

[Add another answer](#)

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New Question Dialog with Dynamic User Categories

- When the survey appears on the website, the label will contain the current visitor details.

Welcome back, Sales department!

Dan Smith, Do you want to learn more about SharePoint?

Yes
 No

How would you rate our service?

Good
 Not so good
 Bad

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Personalized Survey

How to Add Images to a Survey

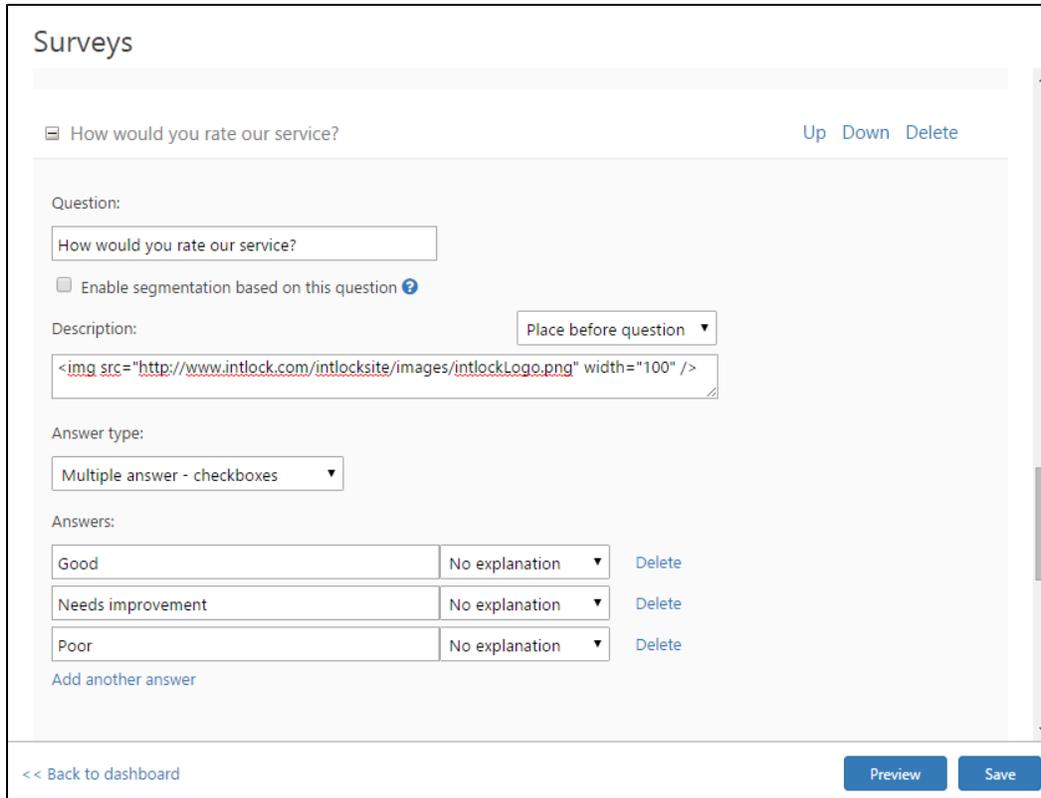
You can add images, such as your company logo, to the survey question description and thank you message text boxes. For example, the following HTML image tag would display the Intlock company logo:

```

```



Survey with Intlock Logo Image



Add Logo Image to Survey Question Description

Surveys

Thank you message behavior

Show the same thank you message for all answers

```

```

Thank you.

Show the thank you message for seconds

Execute the following JavaScript code

```
// JS code goes here...
```

Show the survey results

Redirect the user to a different page

Redirect the user to a different survey:

Show a conditional thank you message (based on visitor's response):

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Add Logo Image to Survey Thank You Message

How to Create a Multi-Page Survey

You can create a multi-page survey by creating a continual survey that will appear right after a visitor submits a survey.

1. In the Survey General Behaviour dialog, under **Who should be prompted to take this survey?**, select **No one (this is a continual survey)** from the drop-down menu.
2. In the Thank you message behaviour dialog of the leading survey, click **redirect the user to a different survey** and select the following survey from the drop-down menu.

Example - How to Display a Survey on the SharePoint Search Results Page When No Results Are Found

You can create a survey that will appear on a page only when specific conditions apply. Follow these steps to display a survey to visitors immediately after they perform a search that returned no results.

1. In the main Surveys user interface, create a continual survey that will appear on the SharePoint search results page when zero results are found.
2. In the Survey General Behaviour dialog, under **who should be prompted to take this survey**, select **No one (this is a continual survey)**.
3. Create a new segment (for more information see "[How to create a segment](#)") with the following parameters:

Segment Type - Basic segment

Segment Scope - Page

URL - contains "osssearchresults.aspx" (the SharePoint search results page)

4. Add a Script type pixel to the segment and enter the following script path: `/_layouts/CardioLogAgent/searchresults.js`

5. Contact your system administrator in order to edit the survey ID in the `searchresults.js` script (var `survey_id_to_show`).
When using the [CardioLog tracking agent feature](#), the `searchresults.js` script is located under the SharePoint web application `_layouts` folder on all Web Front Ends (WFEs).
The survey ID can be retrieved from the `tab_voc_surveys` table in the CardioLog database.
[Contact Intlock](#) if you need any assistance.

Note: The code in this example is compatible with SharePoint 2013 default search.

When a user visits the search results page, they will be added to the segment and the script attached to the pixel will be executed. The code will display the survey only when the search returns zero results.

How to Edit a Survey

In the main Surveys user interface, simply click on the name of the survey you wish to edit.

Surveys

Show survey on all page URLs beginning with this URL address

Survey status:

Active Inactive

General Behavior

Who should be prompted to take this survey?

Show as long as visitor did not answer or closed survey

Show only once per visitor

Show survey even if visitor already answered

Show survey even if visitor already answered (once per visit)

When should this survey be prompted?

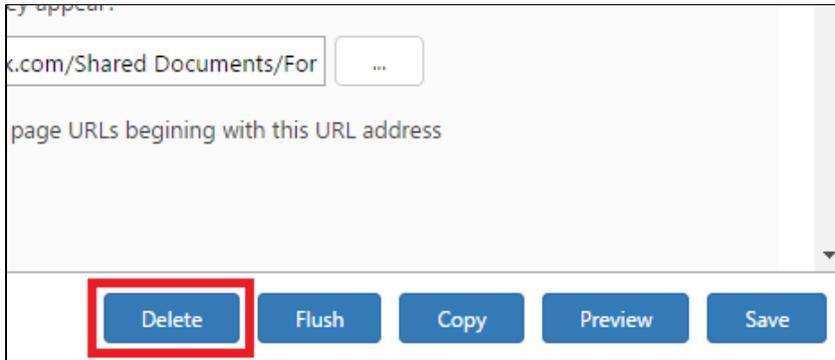
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An open Survey in Edit Mode, with file options highlighted

How to Delete a Survey

1. In the main Surveys user interface, click on the survey you wish to delete.
2. Click on **Delete** in the bottom right hand corner of the main window to delete the survey.
3. Click **Delete** in the pop-up dialogue to confirm your choice.

Note: All related survey reports will be deleted as well.



Survey File Options - Delete Survey

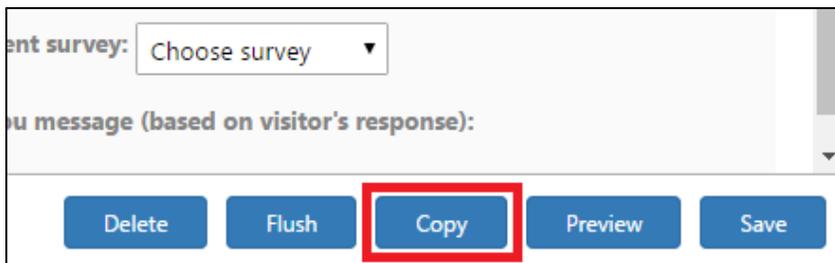


Delete Survey Confirmation Dialogue

How to Copy a Survey

1. In the main Surveys user interface, click on the survey you wish to copy.
2. Click on **Copy** in the bottom right hand corner of the main window to copy the survey.

Note: The copied survey title will be "Copy of ..." and the survey status will be Inactive until you edit it.



Survey File Options - Copy Survey

How to View Survey Reports

Each survey has a **Reports** section which holds information about the survey's responses. The information displayed in the report are general details including the total number of views, the total number of responses, the total number of unique users who have responded to the survey, and the click through rate (CTR), as well as the list of questions and responses. Open text responses and explanations display the date of the response, the response itself and the visitor who responded (IP and user name). The results can be displayed for all pages from which visitors responded to the survey or for specific pages.

1. In the Surveys main window, click **Reports** to the right of the title of the survey you wish to view.
2. By default the survey results are displayed for all pages from which visitors responded to it. In order to view survey results for a specific page, select a webpage from the drop down menu under **List of questions**.

General Details

Views	Responses	CTR	Unique Users
180	12	2.22%	4

Survey Report General Details

Text-based answer - free response				Total: 2
Date	IP	User Name	Answer	
Mon May 9 2016	10.0.0.31	intlock-qa\administrator	free	
Mon May 9 2016	10.0.0.31	intlock-qa\administrator	work work	
Single Answer - radio button				Total: 2
Apple	Total 2			100%
Orange	Total 0			0%
Multiple answer - checkboxes				Total: 3
Apple	Total 1			33%
Orange	Total 2			67%
Write-in answer - short text				Total: 2
Date	IP	User Name	Answer	
Mon May 9 2016	10.0.0.31	intlock-qa\administrator	text	
Mon May 9 2016	10.0.0.31	intlock-qa\administrator	short	

Survey Report List of Questions

How to Export Survey Reports to a Webpart

In order to view survey results through a SharePoint webpart do the following:

1. Create a Page Viewer webpart in SharePoint. The page URL will be the survey report page.
2. In order to retrieve the survey report page URL, click on the desired survey "Reports" button, right click anywhere on the report page, select "Properties" and copy the URL address.

How to Export Survey Reports to a File

CardioLog allows you to automatically export PDF and CSV files directly from the Survey Report window. Simply select **SHARE** from the upper left hand corner and choose the file type you would like to export. The file will automatically be downloaded to your browser's default download folder.

How to Erase Survey Reports

In order to erase the survey reports, without erasing the survey questions or preferences, simply:

1. Click on the survey you wish to erase the reports for In the Surveys main window.
2. Click on **Flush** in the bottom right hand corner to erase the survey reports.

Note: The survey itself will not be deleted.



The screenshot shows a survey report interface. At the top, there is a question: "rompted to take this survey?". Below this is a dropdown menu. The main content area contains several lines of text: "visitor did not answer or closed survey", "per visitor", "n if visitor already answered", and "n if visitor already answered (once per visit)". At the bottom of the interface, there is a row of five buttons: "Delete", "Flush", "Copy", "Preview", and "Save". The "Flush" button is highlighted with a red rectangular border.

Erase survey report