



# Questback Essentials

## User Manual



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# General information

## Browser support and accessibility

Please consult the following document for an updated list of recommended browsers and our policy regarding accessibility: [Browser Support and Accessibility in Questback Essentials](#).

## User Types

PLEASE NOTE that each user license is personal and not for use by anyone except that individual user. Please refer to your organization's user contract for information about the number of available user licenses.

There are three different user types in Questback:

**Super User** (We recommend limiting the number of super users to only one per account.)

- Has access to everything in the service (except private folders not shared by other users).
- Can add new users to the account as well as deactivate current ones.
- Can request reset password links on behalf of other users.

**Designer User**

- Can design, own and publish quests as well as invite respondents to them.
- Can perform advanced analyses and initiate follow up activities to quests owned by the designer as well as other users' shared quests.

**Reporter User**

- Can perform advanced analyses and initiate follow up activities to quests shared with the reporter.

## Account Settings

You have access to the account settings from the side menu. Please note that only super users have the privileges to edit the account settings. From the account settings, you have access to the number of available users on your account, as well as the name of your account.

## Users

You have access to “Users” from the side menu. From the Users page, super users can add new users as well as activate, deactivate or permanently delete existing users. Super users can also request a reset password link on behalf of another user.

- To add a new user, simply click “New User”.
- To activate or deactivate a user, simply check or uncheck the checkbox in the user’s “Active” column.
- To delete an existing user, simply select the user (check the checkbox to the left of its name) and click “Delete User”.
- To add or remove the user from a user group, simply use the checkboxes available under “User groups”.
- To request a reset password link on behalf of a user, simply click the user’s name and then click “Send login information to user”.

PLEASE NOTE: When adding a new user, the option “Send login information to user” must remain checked for the user to receive the welcome e-mail containing the first-time login link. For the convenience of the new user, we do not recommend unchecking this option.

ALSO NOTE:

- If a user is deactivated and the option “Do not move data” is selected, the now deactivated user will remain a member of any user group he/she currently is assigned to.
- If the data is moved to another user, the new user will inherit not only the folders and Quests of the de-activated user, but also any user group memberships. Please



note that once the data has been moved to another user, it will no longer be available to the original user, even if re-activated.

- If a user is deleted, all Quests and folders will be moved to another user. The selected user will also inherit any group memberships.

## User groups

You have access to “User groups” from the side menu. From the User groups page, super users can create, edit and manage user groups.

User groups contain any number of users. Folders can be shared with user groups by super users and designers. Simply adding a new user to a user group gives instant access to multiple folders instead of adding the user separately to each folder.

To create a new group, simply click the “New Group” button, and provide a name for the group and assign users to it in the dialog box that appears.

Existing groups can be edited by clicking on the group name in the grid. This will open same dialog as when creating a new group. Group name can be edited but cannot be left empty.

## SMS Usage (only for accounts with SMS distribution)

Note: Only the responsible user on the account is allowed to make changes to these settings.

**Limit the countries this account can send SMS messages to:** Using this setting, the responsible user can provide the country prefixes (country codes) for the countries in which he/she will allow the users on the account to send SMS messages. Please note that the prefixes must be provided in the following format: +47, +358, etc.

**Limit the amount of SMS messages this account can send:** Using this setting, the responsible user can provide an upper limit on the amount of SMS messages that can be sent from the account. Please note that the users will only be stopped from adding new

SMS invitees when the limit is reached, and that any scheduled SMS invitations and/or reminders will be sent even though the limit is reached. As a result of this, the limit should be treated as an approximate limit rather than an absolute limit.

## **Updating Your User Information**

From time to time you will be prompted to update your user information. If you want to do this manually, simply click your name from the side menu.

When updating your user information, you must set a unique username and password. If you have already set a unique username and password, you can just confirm your information. PLEASE NOTE that you must use your unique username and password every time you log in to the Questback service.

In addition, your user settings include fields such as your name, title, e-mail address, telephone number, country, role and interface language, as well as the option to activate/de-activate the autosave function.

## **Time zone support**

As part of your user settings, you also need to choose your time zone. Once you have selected your time zone, all date/time related information in your quests will be displayed in that time zone: publish and end date/time, date/time of email and SMS invitations and reminders, plus date/time stamps in the distribution log, the reporting and the follow-up. This time zone support provide you a detailed overview about all your activities, as well as allows you to schedule and time your quests according to your local needs.

## **Activity Overview**

After successfully logging in, you will be taken to the activity overview. From here, you have easy access to Quests you own as well as important information about them.

On top of Activity Overview, you will be presented with key information about your account. In the left-hand pane you'll find some key figures:

- **Active Quests:** This is the number of your active Quests.
- **Completed Quests:** This is the number of your completed, i.e. finished Quests.
- **Invitations:** This is the number of invitations you have sent out.
- **Responses:** This is the number of responses you have received to your Quests.
- **Response rate:** This is the average response rate to your Quests.

In the middle pane, you will find your work history. The work history gives you easy access to the most recent Quests you have been working on. Simply click on a Quest title in the work history to open the Quest in Designer. You will also see the number of responses to your most recent Quests in your work history.

In the right-hand pane, you will have access to the latest news from Questback.

From Activity Overview you can easily create a new Quest by clicking the “New Quest” button.

The lower part of Activity Overview consists of six different elements that of course can be organized to suit your needs by simply dragging and dropping them into position:

- **My work history** displays the last quests you have worked on.
- **Active quests** displays the quests made available to respondents.
- **Scheduled quests** displays the quests that will be activated on a given date.
- **Response** displays quests that respondents have completed. The number of completed responses is shown in the “total” column.
- **Incoming messages** displays the quests that have received feedback from respondents following a follow up link.
- **Outgoing messages** displays the quests that have sent a follow up link or notification message to a respondent.

If you want to hide an element, simply click the little cross in its upper right corner. If an element contains more than five Quests, an “expand” button will appear, allowing you to instantly view the entire content. To revert back to the default layout, simply click the “Reset layout” button.

### How to navigate in the activity overview

- To open a quest in Quest Designer, just click its title.
- To open a quest's response in Reporter, simply click the number in its total column in the response element.
- To handle feedback, click a number in the total column in either the incoming messages or the outgoing messages element.
- To change the sorting criteria in an element, simply click the title of the column by which you want to sort.
- To change the activation or expiration date of active or scheduled quests, simply click the date you want to change (in the active quests or scheduled quests element).

## Quests

In Quests, you have easy access to every Quest and folder you own, as well as those shared by other users. From here, you also have quick access to the public Questback templates folder, containing many useful templates for professional quest design.

The **search** field is useful for instant retrieval of quests or folders.

The **action buttons** are located beneath the path bar. (NOTE: some of the action buttons only become available when you select one or more quests/folders by checking the checkbox to the left of their status.)

- **New Quest** offers you two options: you can create a new quest from scratch in the currently open folder (or the folder set as the default folder if you have not opened a specific folder), you can create a quest based on a Questback template in our quest wizard.
- **New Folder** creates a new folder. You will be prompted for a name, the placement and whether you want to share it with other users. You will also have the option to set the folder as the default folder for new quests.
- **Delete** deletes the selected quest(s) and/or folder(s).

- **Duplicate** makes an identical copy of a selected quest. (NOTE: This button is only available when a single quest is selected.) (Video: How to duplicate a Quest)
- **Move** lets you move selected quests and/or folders.
- **Stop** deactivates selected active quests. (NOTE: This button is only available when the selection consists of one or more currently active quests.)

\* The following is NOT copied: the name of the sender (in Distribution), reminder dates (including intervals), notification schemes, the e-mail address entered in the field "Send copy of response to e-mail address" (in Quest Settings), the distribution URL (in Distribution), the invited respondents and the respondent data.

Located directly beneath the action buttons is the quest and folder overview showing:

- The **status** of a quest:
  - **Draft:** an unpublished quest
  - **Scheduled:** A published but not yet active quest
  - **Active:** An active quest is a quest that is available to the respondents
  - **Closed:** A closed quest is a quest that has been deactivated (i.e. it has either outrun its availability interval or been deactivated by the owner or users with whom the quest is shared).
  - **Public:** A quest we at Questback have shared with everyone. You are free to duplicate or adjust it according to your needs.
- The **status** of a folder:
  - **Shared:** A folder shared between you and one or several other user(s)
  - **Private:** A folder you own and have exclusive access to
  - **Public:** A folder we at Questback have shared with everyone
- The **name** of a quest or folder
- The **owner** of a quest or folder
- The **start** (activation date) and **stop** (deactivation day) of a quest
- The **response** a quest has received. This shows the number of responses a given quest has.

- **Shortcuts** for relevant activities (NOTE: These will change according to your user privileges.)

## Questback Templates

From Quests, you have access to the public folder called "Questback Templates". Here you will find many useful templates, all developed by professionals. Our templates are built on well-proven methodologies, covering the following areas:

- HR
- Sales
- Education
- Miscellaneous

Every template is of course customizable, and you are free to use them in any project.

PLEASE NOTE that it is not possible to delete public folders and/or quests.

## Contacts

The contacts page is where you have access to all your saved contact groups. A contact group consists of a set of e-mail addresses (and/or mobile phone numbers if the account has SMS distribution), and can be used to easily invite a group of people (please see the section "Invitees" in this user manual for more info about this) to a Quest.

The contacts page consists of two sections:

### 1. Action buttons

- **New group:** This will create a new contact group. When clicked, you will be asked to provide a name for your new group, as well as whether or not to share it with the rest of the users on your account. After providing these settings, your newly

created list will be opened in order for you to begin adding e-mail addresses to it (please see “Adding contacts” below for more details on this).

- **Export:** This will export the e-mail addresses of the selected contact group(s) to an Excel spreadsheet (.xlsx file).
- **Duplicate:** This will duplicate the selected contact group(s).
- **Delete:** This will delete the selected contact group(s).

## 2. Contact list

In the contact list, you will see all the contact groups you have created, as well as the ones shared with you by other users on your account. The contact list contains the following information:

### Status

This displays whether the contact group is shared or not. Shared groups can be accessed (but not edited) by all users on your account, whereas private groups are only available to you. By clicking ▼, you may filter the list by status. In the dialog, simply select either “Private” or “Shared”, and click “Filter” to limit the displayed groups to only one category. To reset the filter, simply click ▼, and then click “Clear”.

### Group name

This displays the name of the contact group. To open a group, simply click its name.

### Contacts

This displays the number of contacts in the group.

### Group owner

This displays the name of the user that has created the group. By clicking ▼, you may filter the group by owner. In the dialog that opens, simply provide the text you would like to filter by, and select the logic from the dropdown:

- **Is equal to:** This will only display owners that match the entire provided text string.
- **Is not equal to:** This will only display owners that do not match the entire provided text string.

- **Starts with:** This will only display owners that names begin with the provided text string.
- **Contains:** This will only display owners that contain the provided text string somewhere in their name.
- **Does not contain:** This will only display owners which names do not contain the provided text string.

## **Date created**

This displays the date the list was created.

## **Adding contacts**

There are two ways of adding contacts to your contact groups:

### **1. From Contacts page**

To add contacts to a contact group, simply open the group by clicking its name in the contact list, and then click “Add E-mails”. In the dialog that follows, simply copy and paste the e-mail addresses you would like to add into the text box, and click “Finish”. PLEASE NOTE that the e-mail addresses must be separated by line breaks.

### **2. From Invitees**

If you have invited some invitees to a Quest, you may create a new contact group from these. To do this, simply open the “Invitees” section on the Distribution page (please see “Distribution” in this user manual for more info about this), select the invitees you would like to add to the contact group, and click “Save to Contacts”. You will then be presented with a dialog box where you’ll have to provide a name for the contact group, as well as whether or not to share the group with the other users on your account.

Please note that if your account has SMS distribution, you are able to add mobile numbers as well as e-mail addresses. The workflow would be the same.



## Editing a contact group

To edit an existing contact group, simply open the group by clicking its name. Inside the group, you'll have access to the following:

- **Add E-mails:** This will open a dialog box where you can add e-mail addresses to the list by copying and pasting them into a text box. PLEASE NOTE that the e-mail addresses must be separated by line breaks.
- **Delete:** This will delete the selected contact(s).
- **Settings:** This will open a dialog box where you can edit the name of the contact group, as well as decide whether to share it with the other users on your account or not.

Please note that if your account has SMS distribution, you are able to add mobile numbers as well as e-mail addresses. The workflow would be the same.

## Designer

The Quest Designer is divided into three main areas:

1. The Action Buttons
2. The Quest Overview
3. The Working area

### 1. Action Buttons

- **Add:** Use this button to add one of the following elements to your quest:
  - **Add Question** creates a new question for your Quest. When you click "Add Question", the Question Type bar expands automatically, so that you can easily select the right question type for your question.
  - **Add Page Break** creates a new page break in your Quest. Page breaks are useful when you want to determine the questions that appear at the same time (i.e. on the same page).

- **Preview Quest** lets you preview your Quest without recording the answers you provide. If you want to record the test answers, please choose "Test Quest" from the Test & Publish page.

We offer four different previews of the quest: Desktop view, tablet view, smartphone view as well as a print preview. The print preview renders the quest in a paper friendly format, stripping away as much unnecessary extras as possible. Moreover, it turns dropdown menus into radio buttons, and some heavier question types like hierarchy questions into sets of open answer inputs. Despite this, we recommend that you take the output medium into consideration when designing quests for paper, and to stick to simple question types like single and multi-select vertical, as well as open ended questions.

From the print preview, you are able to export the quest to MS Word (.docx) format for further editing prior to printing, or simply print it directly using the print dialog in your operating system. TIP! If you would like to export the quest to PDF, most modern operating systems have this as an option in their native print dialog.

- **Other Actions** contains the following useful tools:

### 1. Set Properties on Multiple Questions

Clicking this opens a dialog box where you have easy control over the properties "Mandatory Question" and "Hide Question Text" for all your questions.

To set the properties on a question, simply check the checkboxes next to it and click "Save".

### 2. Randomize Question Sets

This feature allows you to group questions together in question sets that can be presented in a random order (while the order of the questions inside each set is preserved). This is useful to help avoiding the order of the questions affecting the outcome.

To start using this feature, it is helpful to think of it as consisting of three levels:

1. **The Groups:** This is the top level. The groups are presented in a static order, while the content of each individual group can be presented in a random order. (To enable this, just check "Randomize" next to the group name.)
2. **The Question Sets:** This is the middle level. Each question set must be contained within a group, and they will be presented in a random order if randomization is activated for their parent group.
3. **The Questions:** This is the lowest level. Each question must be contained within a question set, and they will be presented in a static order.

To **add a question** to a question set, simply select it from the dropdown menu under the set. To add another question, just click "Add a Question" (from within the question set to which you want to add the question).

To **add a question set**, simply click "Add a Question Set" (from within the group to which you want to add the question set).

To **add a group**, simply click "Add a Group".

If you want to turn off randomization for any of your groups, simply expand the group and remove the check mark from the "Randomize" check box.

PLEASE NOTE that if you are using this feature in combination with page breaks, you have to include the page breaks in the question sets to ensure that they occur in the right place. If you e.g. would like the page breaks to occur between the question sets, we recommend that you include a page break at the end of each question set.

### 3. Import Questions

This feature allows you to quickly import questions into Questback. In order to use this feature efficiently, we recommend that you create a spreadsheet or a word processor table with four columns. Column A is where you provide the **question texts**. In column B you

can provide **answer alternatives**. If the question is an open answer question, column B can be used to provide a **default text**, i.e. a placeholder text pre-populating the input field. If you are creating a matrix question, please provide the **sub-questions** in column C. To add **additional information** to the question, simply provide the text in column D. Here is a visual representation of how the table should be structured:

Question 1 (multiple choice / single select)	Answer alternative a		Additional information in question 1
	Answer alternative b		
	Answer alternative c		
Question 2 (open answer)	Default text		Additional information in question 2
Question 3 (matrix)	Answer alternative a	Sub-question 1	
	Answer alternative b	Sub-question 2	
	Answer alternative c	Sub-question 3	
	Answer alternative d		

When you have structured your questions according to these rules, simply click "Start", and follow the instructions in the dialog box. In the last step, you are presented with a preview of your questions as well as the opportunity to set the correct question type for each individual question. When you are satisfied with your questions, simply click "Finish" to add the questions to your Quest.

PLEASE NOTE that you cannot enable the "I don't know" and/or "Other" options in the import dialog. In order to add these options to an imported question, you would have to manually enable them in Quest Designer after completing the import.

ALSO NOTE that each import is limited to 500 lines. If you must import more than 500 lines, we recommend dividing the material so that you can import in two or more turns.

#### **4. Assign scores to answer alternatives (only available for silver and gold accounts)**

With scoring, you can assign scores to answer alternatives in single select and multi select questions.\* When the respondent provides his/her answers, the score achieved is summarized and saved as respondent data for use in reporting (please see "Add score" in the reporting section of this help file), notifications (both as data tags and to trigger notifications), routing, follow-up, and as data tags within the Quest itself.

To add scores to answer alternatives, simply select "Assign scores to answer alternatives" and provide your scores in the input box next to the answer alternatives displayed in the dialog box that appears. You may assign positive as well as negative scores with up to two decimals.

TIP! Negative scores are helpful in multi select questions. Simply give the correct answers a positive score and the wrong answers a negative score.

\* You may add scoring to the following question types: single select horizontal/vertical, multi select horizontal/vertical, single select matrix, multi select matrix, and single select dropdown.

#### **Displaying scores with data tags**

In all text fields that accepts respondent data tags, you can now use the following score tags in order to display score related information:

- `[!ScoreObtained!]`: <sup>[L]</sup><sub>[SEP]</sub>This is the score obtained by the respondent. Please note that if you use this tag inside the Quest, it must be preceded by at least one page break to work.
- `[!ScoreCurrentMax!]`: This is the max possible score from the questions the respondent has been presented with. If used inside the quest, it will of course display the max score from the questions the respondent has been presented with up until the latest page break.
- `[!ScoreMax!]`: This is the sum of all the highest possible scores in single select questions and all positive scores in multi select questions.

The score tags are available via the dropdown menu “Insert tag” in the text editors.





### **Filtering, routing, and triggering notifications based on score**

If you have a Quest with scoring, you may create filters and routing conditions, as well as to trigger notifications based on the achieved score. To do so, simply select the option “ScoreObtained” from the “Select question” dropdown when setting up your criterion, and then proceed by selecting one of the operators (is equal to, is equal or lower than, is equal or higher than, or is between) and provide your values in the input boxes.

## **2. Quest Overview**




The Quest Overview presents you with a simple map of your Quest.

### **Information Symbols**

1.  This is a mandatory question.
2.  This question has active actions.
3.  Routing is enabled for this question.
4.  This question is part of a randomization group.

### **Action Icons**

When you hold (hover) your mouse pointer over a question, the action icons are revealed:

1.  Move the question up or down.
2.  Duplicate the question.
3.  Delete the question.

### Working in the Quest Overview

- To **move** a question or a page break, simply drag and drop it to the desired location. It is also possible to move a question using the green up and down arrows. PLEASE NOTE that elements marked with a padlock (e.g. the thank you note etc.) cannot be moved.
- To **edit** a question, just select it (click the question once so that it changes to a darker color) and start editing in the working area.
- To **duplicate** a question, just click its duplication icon.
- To **delete** a question, just click its deletion icon.

## 3. Working Area

The working area is divided into different sections that can be expanded and collapsed using the triangle symbol in front of the section name. Please note that the sections available change with the selected question type.






### Question Type

This is where you decide which question type to use. It is important that you choose a question type that suits your question and the information you want to gather. To help you, we have included a short description of every question type in the service. To view the description of a specific question type, simply hold (hover) your mouse pointer over it.

The default question type (i.e. the one selected when you create new questions) is marked with "Default". To change the default question type, simply select the desired one and click "Make Default".

The currently selected question type is always displayed in the section bar.

## Question properties

- **Question** is the question text (max 250 characters).
- **Include Additional Information** is useful if you need to add more text, e.g. answer instructions. If you choose to include additional information, simply provide the text in the text box that appears upon activating this option.
- **Answer Alternatives** is where you provide the answer alternatives for single select and multiple choice questions. You can add and edit your answer alternatives in the input fields, reserving a separate input field for each answer alternative.
  - To add another answer alternative, simply click .
  - To delete an answer alternative, simply click .
  - To move an answer alternative up or down, simply click the arrows  .
  - To access the answer alternative settings, simply click the gear icon () next to the answer alternative:
    - **Action**  
This lets you define a special action that is to occur when the answer alternative is selected:
      - **Continue**: Selecting this option lets the respondent continue to the next question in the Quest. This is the default option for all the questions in your Quest.
      - **Go to end**: Selecting this option directs the respondent to the end of the quest.
      - **Go to website**: Selecting this option lets you specify a website to which the respondent is directed. If you decide on using this feature, please be aware that the respondent will not be able to answer any questions



following the action. Any answer given prior to the action, however, is recorded as usual.

- **Quota**

This lets you specify and apply an answer-based quota, i.e. the number of times an answer alternative can be selected before being “closed” for further selection. This is useful if you e.g. use ESS to register participants to a course with limited slots etc.

- **Quota size:** This is the number of times this answer alternative can be selected before being closed for further selection.

When the quota is reached, you can either:

- Stop and return the respondent to the quota question and display a custom message, or
- Simply stop the respondent, by not allowing him/her to proceed.

- **Routing**

This lets you define conditions that has to be met in order for the answer alternative or row to show up. When selected, simply define the condition, and the answer alternative or row will be hidden from anyone not meeting the condition.

You may base the routing on any preceding questions with fixed answer alternatives, i.e. all questions except Open answer (short and long), Calendar, File upload, Matrix open answer and Hierarchy.

The following question types support routing on answer alternatives, rows, and/or items:

- Single select (horizontal and vertical)
- Multi-select (horizontal and vertical)
- Matrix single select
- Matrix multi-select
- Matrix open answer

- Matrix multiple (for fixed alternative columns)
- **Image**  
This lets you add an image to the answer alternative. PLEASE NOTE that for reporting purposes, we recommend not leaving the answer alternative text blank even though you add an image to the alternative. If you would like to only display the image, simply use the function “Hide question text” described in the question settings section below.
- To delete all the provided answer alternatives from the question, simply click **"Delete All Answer Alternatives"**.
- To change the numeric values of the scale (the default is 1-n), simply click **"Change numeric values"**, and provide the values in the input fields that appear next to the input fields for the answer alternative texts. The numeric values may be integer, negative or decimal numbers. We support any scales, incl. “regular” scales such as 1-to-5, inverse scales like 5-to-1, scales that start with 0 such as 0-to-10, or scales with a custom range, such as 6-to-10. This option is available for the following question types: Single Select Vertical, Single Select Horizontal, Matrix, single select and Single Select Drop-Down. PLEASE NOTE that the numeric values applied to the options “I don’t know” and “Other” will not be part of the calculation when calculating the mean value. These options are always removed from this calculation. The numeric values applied, will however be available when exporting the raw data.
- If you want to provide multiple answer alternatives in a fast and simple way, click **"Paste multiple answer alternatives from the clipboard"**, and provide them in the dialog box that appears. PLEASE NOTE that the individual alternatives must be line separated.
- **Also Include the Following Answer Alternatives** lets you include two useful answer alternatives: the “I don’t know” option and a text field for “Other” answers, opinions etc.
- **Rows:** This is the texts that are to be located on the vertical axis of matrix, “open answer short, multiple” and “priority drop down” questions.

- **Items:** This is the texts that are to be prioritized in “priority drag and drop” questions.
- With **Default answer**, you can pre-populate the input field for open answer questions with a default answer. The respondent will of course be able to replace the default answer with his/her own answer.
- **Answering options:**
  - **Display as slider:** A slider is an alternative way of inputting answers to a survey. The slider can be dragged from left to right, and the answer is provided by dragging the slider to the desired position.\*\*
  - **Respondent can remove the given slider answer:** This is an option for the respondent to remove a given answer by clicking a “Remove answer” link below the slider. This leaves the slider unanswered. The slider becomes inactive and the drag handle is no longer displayed.
  - **Display current position above slider:** If enabled, a tooltip with the current answer will be displayed above the slider drag handle.
  - **Starting position is selected by default:** This activates the slider by default, i.e. the answer defined as the starting position will be automatically given if the respondent doesn’t move the slider.
  - **Starting position:** This defines the answer that should be pre-selected as the slider’s starting position.
  - **Start and End labels:** This is the text labels that are to be displayed above the left and right endpoint of the slider. By default, these will be the same as the first and the last answer alternative in the question. If you leave these empty, no labels will be displayed when answering the question.

By default, the slider is themed with neutral grey colors. These can, however, be changed with a custom theme using custom CSS. More information about slider customization with CSS can be found in the [custom CSS documentation](#).

**Please note:** Slider is displaying answer alternative names not numeric values.

\* This is only available for single select and multiple choice questions, but not the matrix versions.

\*\* The slider is available as an option for the following question types: single select vertical, single select horizontal, single select drop-down, matrix, single select, NPS, matrix, double scale and matrix, custom. Please note that that the following limitations apply to the slider:

1. The options “I don’t know” and “other” cannot be used in combination with the slider.
2. The slider cannot be used in combination with randomization of answer alternatives.

## Matrix questions

We offer a handful of matrix question presets to quickly get you going setting up a matrix question. In addition to these, you may set up your own custom matrix question using the “Matrix, custom” question type.

When a matrix question is selected, you will have access to the following matrix-specific controls:

- **Rows:** These are the rows in the matrix question, i.e. the texts populating the vertical axis of the matrix. Think of these as your “sub-questions” in the matrix.
- **Column number:** This is for selecting the matrix column you would like to edit. NOTE: this control is only available for matrixes with multiple columns.
- **Display column label:** When this is activated, a label of your choice will be displayed above the matrix column. This is useful if you e.g. would like to provide more context to the answer alternatives in the column. NOTE: this control is only available for matrixes with multiple columns.
- **Valid format:** This is for restricting the input the respondents can provide in the open text field. NOTE: this control is only available for columns with open answer text fields.
- **Add a default text to the input field:** This is for adding a default answer to the input fields. The input fields will be pre-filled with their default answer, and the respondent is free to either submit this as his/her answer, or provide their own answer in place of the default answer.
- **Column type:** This is for setting the column type of the selected column in matrix, custom questions. We offer the following column types:

- **Multiple choice:** The column will contain fixed answer alternatives. The respondent can select one or more of these.
- **Single select:** The column will contain fixed answer alternatives. The respondent can select only one of these.
- **Open answer short, multiple:** The column will contain multiple text fields of the type “Open answer short”. The respondent can provide free text answers in these.

## Translations

Here you can provide translations for the currently selected question. To do so, just select a language from the drop down menu, and provide your translations in the appropriate fields. PLEASE NOTE that only languages selected as additional languages on the Languages page will show up in the drop down menu.

## Question Settings

This is where you edit the question specific settings.

- **Show a Dividing Line above This Question:** By selecting this alternative, the question is visually separated from the preceding one by a line.
- **Hide Entire Question** hides the entire question from the respondents. This option is used in combination with respondent data. It will automatically be used when you have imported predefined information about your respondents.
- **Hide Question Text:** By hiding the question text, the text provided in the Question Text field (under Question Properties) is hidden from the respondents. This can be useful if your question is especially long – simply hide the question text, and provide your long question in the field for additional information. We do, however, recommend that you provide a short identifying text in the Question field to help you navigate on the Results page.
- **Personal data:** When selected, the question is flagged as personal data, meaning that it will be deleted when the retention period is up (see GDPR settings in the section Quest Settings for more details) or when manually deleting personal data.

- **Randomize Answer Alternatives** presents the answer alternatives in a random order. This is useful if you want to be sure that the order of the alternatives does not systematically influence the responses.
- **Mandatory Question:** By selecting this alternative, the respondent must provide an answer to the question to be able to move to the next page in the quest. For the convenience of your respondents, we do not recommend overusing this feature.

## Routing

If you want to channel respondents to different questions depending on their answers on previous questions, routing offers a set of sophisticated tools for doing this. With routing you can choose to only display a specific question if a certain condition is met (i.e. the respondent answers according to a defined response pattern). The condition can be as simple or complex as you need.\*

To enable routing, simply create a condition. When you have created a condition, the routing is enabled, and the question only visible to respondents matching the set condition. To disable the routing, simply remove the condition, and the question will be visible to all respondents.

If you have created a condition you want to apply to other questions in your Quest, you can easily do this by clicking "Apply this condition to other questions". This opens a dialog box where you can check the questions to which the selected condition will be applied.

\* The upper limit is 50 conditions in max 5 levels.

## Format

If you want to limit the permitted input format in an open answer\*, you can do so by automatic input validation. To activate this feature, simply select the desired format from the dropdown menu. This is useful when you want to record a date, time, currency etc.

The predefined valid formats are:

- Email
- Date (99.99.9999)
- Time (99:99)
- Time (99:99:99)
- Numbers only (#)
- Letters (without spaces) only (@)
- Four letters (AAAA)
- Four numbers (9999)

It is also possible to create your own custom combinations using:

A = a letter

9 = a number in the range 0-9

% = anything, no length limitation

\_ = space

! = preceded by modulus type name

### **Examples:**

- "AA99" (two letters followed by two numbers, e.g. "sr78")
- "A%" (a string starting with a letter, e.g. "t48rns3")
- "cd999A" (a string starting with "cd" followed by three numbers and one letter, e.g. "cd332r")

\* This only applies to questions of the type "Open Answer Short".

## **Media Manager**

Media Manager is the area where all media files are uploaded and managed. Files can be images, documents or videos. These files can be used in various places around Essentials. For example, logos and images used in themes are uploaded and accessed here.

Media Manager can be accessed from the side menu.

Media Manager offers two modes of viewing the files.

- Thumbnail mode
- Grid mode

User can easily toggle between these modes by selecting either one of the icons above the grid. In addition, users can also select which media type they want to view. Media types are: images, documents, videos. A checkbox for viewing user's private files only is also available.

### **Upload file**

Files up to 5 MB of size can be uploaded. All uploaded files are private by default.

File type extensions supported are: doc, docx, ppt, pptx, xls, xlsx, dot, dotx, rtf, pdf, txt, csv, jpg, jpeg, jpe, png, gif, bmp, eot, svg, woff, woff2, ttf, otf

### **Link media**

External media files can be added to Media Manager by providing the URL for the media. Following media types are accepted: png, gif, jpg, and jpeg images as well as YouTube videos.

Linking an image file loads the file from the given URL and copies it to Media Manager. Media Manager will work with the copy and not load the file from original URL after that.

### **Delete**

User can delete any file he or she has uploaded. Files shared by other users cannot be deleted.

### **Share**

User can share any file he or she has uploaded. Shared file will be visible to all users in the account.

Sharing a file is easy way to make sure everyone is using, for example, same version of company logo.



## **Make private**

Make private is the opposite of sharing – meaning user can make their file private again.

## **Selecting media files**

Files in Media Manager can be selected and used in most text fields, as well as Theme Manager, the logo section of Quest settings etc. This is done using the Media picker.

## **Quest Settings**

In Quest Settings you can edit the Quest specific settings. The settings are grouped in seven sections.

## **Texts**

**Quest type:** to start with, we ask you to categorize your quest, and to select one of the 5 options in the dropdown:

1. Customer Feedback (VoC)
2. Market Research
3. Employee/HR feedback (VoE)
4. Training/seminar/event
5. Other

This quest categorization helps us to learn more about the feedback activities of all our customers, so that we can improve and align our services and content to the actual usage of Questback Essentials.

**Quest Language:** Here you can view the default language of your Quest. If you are editing a multilingual Quest, the additional languages are shown in a separate column to the right. (NOTICE that only one additional language is shown at a time. Please use the dropdown menu to rotate between the additional languages.)

To provide your translations, just select the correct language and add the text to the textboxes underneath. Repeat this step for every additional language you want to support.

**Quest Name:** This is the name of the Quest. (PLEASE NOTE that the Quest name is an obligatory field.)

**Quest Introduction:** Here you can add an introduction to your Quest. This is useful if you want to inform or give instructions to your respondents.

**Thank You Note:** This text is shown to the respondent upon Quest completion. (PLEASE NOTE that this is an obligatory field.)

## Ownership and Location

**Quest Owner:** This is the user holding the editing rights to the Quest. PLEASE NOTE that designer users only can edit Quests they own, while super users can edit every Quest in folders to which they have access.

**Folder:** The folder that contains the Quest. To move the Quest, simply select a different folder from the dropdown menu.

## Hidden Identity

With hidden identity the respondent's e-mail address is hidden, making the respondent not easily recognizable. Your ability to initiate follow up activities is not influenced by this setting, as it is only their e-mail address (i.e. their main identifying mark) that is hidden. PLEASE NOTE that in order to make the hidden identity feature efficient, you must not include any questions that may make the respondents easy to identify in the Quest.

**Always:** This option hides every respondent's identity.

**Optional:** This option allows each respondent to choose whether or not to hide his/her identity.

**Never:** This option makes every respondent easily recognizable by displaying his/her e-mail address on the Feedback page.

NOTICE: It is not possible to change this setting if the Quest is published.

## Logo

Here you can select a logo for your Quest (e.g. your organization's logo).

**Align Logo:** Here you can choose the horizontal placement of the logo. It can be positioned to the left, right or center of the page.

**Show logo on:** Here you can choose which pages to display the logo on. It can be displayed on every page, only the first page or the first page and thank you note page only (i.e. only the first and the last page), or on no page (of the quest).

In addition, you can activate the option “Show logo in emails” to have your logo not only displayed in your quest, but also in your email invitations and reminders, in your notification and follow-up emails as well as the email receipts.

## Theme

Here you can select a theme (i.e. color scheme and design) for your Quest, plus a theme for your emails (i.e. email invitations and reminders, notification and follow-up emails, as well as email receipts). Our large selection of diverse themes is available in the dropdown menus, and with the selected theme displayed as thumbnail.

**Display Quest name:** Enable if you would like the name of the Quest to be visible in the survey form.

**Display progress bar:** Enable if you would like to display a progress bar to the user while he/she responds to the Quest. The progress bar will show the amount of completion based on the number of pages left.

## Response Options

**Send Copy of Response to E-mail Address:** By enabling this option you can specify an e-mail address to which a copy of every response is sent.

**Allow Multiple Responses per Respondent:** By enabling this option every respondent is permitted to submit more than one response. Please be aware of the impact this may have on the results of your Quest. You should only enable this option for Quests where the statistics themselves are not important (e.g. seminar registrations etc).

**Display Back Button at the Bottom of Each Page:** If you add a back button to your Quest, the respondents are able to navigate backwards (i.e. revise already submitted pages).

NOTE: We do not recommend activating the back button as some browsers may have trouble with this.

**Add Opt-Out Option to the E-mail Invitation:** This will add an opt-out link to the e-mail invitation, allowing the respondents to exclude themselves from both the Quest and any reminders. This option is enabled by default due to spam preventing actions. We do not recommend disabling it.

**Send Copy of Response by E-mail to Respondent:** Here you can choose whether or not to e-mail a copy of the response to the respondent. By selecting "Optional" you let the respondents choose for themselves.

## Security

**Require Password from Respondents:** If you enable this option, a password is required for the respondent to respond to the Quest. PLEASE NOTE that this only applies for respondents following a distribution URL (see "Distribution" for more information on how to distribute your Quest by URL).

When enabling this option, a password is automatically generated and displayed. To change the password, simply replace it and save your work. PLEASE NOTE that every respondent must use the same password. We do not support generating individual passwords.

**Use SSL:** When this option is enabled, the response is transferred over an SSL-encrypted connection. This option is enabled by default, and we do not recommend disabling it.

## Quota Settings

By using quotas, you can set an upper limit on the number of responses allowed. To activate this, simply select “Quest has upper limit on number of answers”, and provide the number of responses you would like to receive in the “Quota size” input field. You can then select what to do when the Quota is reached:

- **Close the Quest:** selecting this will close the Quest, and display the message you provide in the input field to invitees trying to access the Quest.
- **Redirect respondents:** selecting this will redirect invitees trying to access the Quest to the URL you provide in the input field.

## GDPR settings

**Make this quest GDPR compliant:** this enables/disables the GDPR feature on the quest. When enabled, the data subject will be presented with the information provided in the input boxes and will have to comply to the terms in order to be able to respond to the quest.

**Define personal data questions:** this opens a dialog where the controller can flag questions and respondent data as personal data, and hence data that will be deleted when the retention period is up, or a user manually deletes a respondent’s personal data.

**Delete pre-GDPR:** This will delete the personal data from responses received prior to enabling GDPR on the quest. PLEASE NOTE that in order for this to work as intended, you must first define the questions containing personal data. When you initiate this

function, all personal data for responses received prior to enabling GDPR will be deleted within one minute.

**Load template:** this opens a dialog for selecting an existing template (templates are managed in the GDPR Statement Manager). Templates can be used as is or tweaked to match the individual quest by modifying the data filled into the input fields. Templates works by copy, i.e. modifying data in the GDPR settings, will not affect any loaded template. Note that all fields except Retention period can be part of a template.

**Save as template:** this opens a dialog for saving the data currently provided in the GDPR settings as a template (all provided data except Retention period will be included in the template). The template can be further modified in the GDPR Statement Manager.

**Retention period:** This defines how long the personal data will be stored before being deleted from the system. The retention period is calculated from the moment the data subject complies to the GDPR statement (more precisely: from the moment the data subject clicks next or submit on the first page of the quest). If the controller selects “Unlimited”, he/she will have to provide information in the field “Please explain criteria used to determine the retention period”.

**Welcome message:** This is a message that will be displayed above the GDPR statement on the consent page the data subject is presented with.

The other available fields are as follows:

Field label	Mandatory	Example for employee engagement
Company name (controller)	yes	Questback AS
Contact Details <ul style="list-style-type: none"> <li>• Address</li> <li>• Phone</li> <li>• Email</li> </ul>	yes	Bogstadveien 54, Oslo
Controller’s representative (if applicable)	no	Kanzlei Vollpfeifen & Partner ADDRESS

Purpose of <b>each processing operation</b> for which consent is sought	yes	The purpose for the processing of personal data for the defined use case is to comply with company regulations regarding continuous dialogue with employees about their work environment, job satisfaction, career opportunities and other elements relevant to their position in the company. Company will use the personal data in order to assess trends in employee satisfaction over years, in order to pinpoint areas where measures are needed for increased employee satisfaction, or to mitigate negative working environment.
What personal data will be collected and used	no	Name, email, IP address,
What special categories of personal data will be collected and used	no	sexual orientation, health information, trade union membership
Retention period	yes	3 months
Criteria used to determine processing period (if no retention period has been defined)	yes if unlimited retention period	after 250 survey are completed
Legal basis for processing	no	consent
Legitimate interest of controller or third party (if applicable)	no	evaluate and assess customer satisfaction, improve workplace culture and atmosphere

Recipients or categories of recipients of the personal data	no	HR, Senior management
Transfer of data to a non-EU/EEC country or international organisation, and safeguards	no	transfer to USA based on EU standards clauses
Statutory or contractual requirement (if applicable)		none
Automated decision making	no	none
Information on data subject rights	no	text
Information on right to withdraw consent	no	text
Information on supervisory authority	no	text
Name & contact details of data protection officer (if applicable)	no	Dr. Kinast und Partner ADRESSE

Next to the following fields, you will have access to a folder icon, providing you with a handful of boilerplate texts for the field in question:

- Purpose of each processing operation for which consent is sought
- Legal basis for processing

## Languages

This is where you manage the languages in your Quest as well as translate the individual questions and responses options.

**Select Default Language:** This is where you set the default language in your Quest.



## Additional Language

**This is a Multilingual Quest:** If you want to add additional languages to your Quest, simply enable this option and choose a language from the dropdown menu that appears. To add another language, simply click "Add a Language" and select it from the dropdown menu that appears.

Once an additional language is added, you also get the selection to make this additional language the new default language of your quest.

**Let Respondent Choose Language?:** Here you can choose whether or not to let the respondent choose between the provided languages.

- If you select "**Yes, with flag**", the list of languages contains national flags in addition to letters, with the default language of the quest pre-selected as language choice.
- If you select "**Yes, without flags**", the list of languages contains letters only with the default language of the quest pre-selected as language choice.
- If you select "**No, open the quest in the language of the invitation**", the is not presented with a language selection page but the quest opens automatically in the language in which he or she received the invitation in.

## Translations

If you have activated multilingual support (i.e. enabled the option "This is a Multilingual Quest") and translated your questions in MS Excel, Google Docs etc.\*, you can copy and paste them all into Questback here. To do this, simply copy a continuum of cells from your spreadsheet, head back to Questback, and select the first cell to which you want to amend the text (this cell should correspond to the first cell in the copied continuum).

When you have done this, simply click "Add Translations", and paste the translated texts into the window that appears. PLEASE NOTE that only plain text is supported, i.e. any rich text formatting applied will be removed when pasting.

TIP 1: When using quotation marks (single and/or double) in a spreadsheet, please make sure to use an even number.

TIP 2: Due to the way spreadsheets handle text, you need to add TWO single quotation marks (") at the beginning of a cell to display ONE ('). PLEASE NOTE that this only applies to single quotation marks at the beginning of a cell.

TIP 3: To minimize the risk of doing errors, it is recommended to have all questions, answer alternatives, comments etc. saved in the default language before you start providing translations.

TIP 4: If you prefer to work in a spreadsheet, you can export the default language questions by clicking “Copy to Clipboard” and pasting them into a new spreadsheet.

\* If you prefer to translate the questions directly in Questback, you can do this question by question under “Translations” in Quest Designer.

## Distribution

From here you can distribute your Quest to your respondents. There are three primary ways of doing this: by e-mail invitation, by SMS (if activated in your account) and by link.

### Invitees

This section is where you have access to all the invitees you have added to the Quest. PLEASE NOTE that people you invite via the “Distribute by Link” option will not show up under the invitees section.

The invitees section consists of two main sections:

#### 1. Action buttons


- **Add Invitees:** This will add invitees to the Quest. See section “Adding invitees” below for more information about this.
- **Send Invitation:** This will send an e-mail invitation to the selected invitees.

- **Export:** This will export the e-mail addresses, unique invitation link, and any uploaded respondent data associated with the selected invitees to an Excel spreadsheet (.xlsx file).
- **Save to Contacts:** This will save the selected invitees to a new contact group. See “Contacts” in this user manual for more information about contact groups.
- **Delete:** This gives you the following options:
  - **Delete invitees:** This deletes the selected invitees and any uploaded respondent data.
  - **Delete invitees and responses:** This deletes the selected invitees, their uploaded respondent data as well as their response. PLEASE NOTE that deleting invitees that have responded with hidden identity, will not delete their response to the Quest.
  - **Delete respondent data:** This deletes the respondent data for the selected invitees, but the invitation (and their e-mail address) will remain.
  - **Delete personal data:** This deletes respondent data marked as personal data (see the section GDPR settings in Quest Settings in this guide for details on how to do this) from the invitation, as well as anonymizing the e-mail address for the selected invitees. PLEASE NOTE that you will not be able to send new invitations or reminders to the invitee after having used this function. When this function is used in conjunction with the deletion of personal data on the response, ALL personal data for the respondents in question is deleted from our systems.

## 2. List of invitees

In the list of invitees, you will see all the invitees you have added to the Quest, as well as some important information:


### E-mail

This is the e-mail address of the invitee. By clicking , you may filter the list by e-mail address. In the dialog that opens, simply provide the text you would like to filter by, and select the logic from the dropdown:

- **Is equal to:** This will only display e-mail addresses that match the entire provided text string.
- **Is not equal to:** This will only display e-mail addresses that do not match the entire provided text string.
- **Starts with:** This will only display e-mail addresses that start with the provided text string.
- **Contains:** This will only display e-mail addresses that contain the provided text string.
- **Does not contain:** This will only display e-mail addresses that do not contain the provided text string.

By using the “And/or” dropdown, you may provide an additional criterion, e.g. you may filter the list to only display e-mail addresses that start with “John” and that contain the “.org” domain.

### Language


This is the language that the invitee should be invited in. By clicking , you may filter the list by invitation language. In the dialog that opens, simply provide the text you would like to filter by, and select the logic from the dropdown:

- **Is equal to:** This will only display invitation languages that match the entire provided text string.
- **Is not equal to:** This will only display invitation languages that do not match the entire provided text string.
- **Starts with:** This will only display invitation languages that start with the provided text string.
- **Contains:** This will only display invitation languages that contain the provided text string.
- **Does not contain:** This will only display invitation languages that do not contain the provided text string.

### Invitation status

This is the status of the e-mail invitation:

- **Not invited:** This means that the invitee is neither invited, nor scheduled to be invited. If you would like to invite an invitee with the status not invited, simply select him or her and click “Send invitation”.
- **Scheduled for delivery:** This means that the invitee will be invited when the Quest is published and our e-mail server has the capacity.
- **Delivered:** This means that the invitation has been sent to the invitee.
- **Soft bounced:** This means that the invitation failed to reach the invitee. Even though delivery failed this time, future deliveries to the same invitee might succeed. The reasons for being categorized as soft bounced are temporary failures like full recipient mailbox, disabled recipient mailbox, recipient mail server continuously asking us to “try later”, etc.
- **Hard bounced:** This means that the invitation failed to reach the invitee. Future deliveries to the same invitee will also fail. The reasons for being categorized as hard bounced are permanent failures like invalid e-mail address or invalid e-mail domain, message rejected errors like blacklisting, inappropriate content, too many connections in a period of time, receiving server unable to accept e-mail for the destination domain, or communication failures like not being able to connect to recipient server.


By clicking , you may filter the list by invitation status. In the dialog that opens, simply provide the text you would like to filter by, and select the logic from the dropdown:

- **Is equal to:** This will only display invitation statuses that match the entire provided text string.
- **Is not equal to:** This will only display invitation statuses that do not match the entire provided text string.
- **Starts with:** This will only display invitation statuses that start with the provided text string.
- **Contains:** This will only display invitation statuses that contain the provided text string.
- **Does not contain:** This will only display invitation statuses that do not contain the provided text string.

## Response status

If the e-mail invitation was delivered, this will display the response status:

- **Completed:** This means that the invitee has submitted a complete response.
- **Uncompleted:** This means that the invitee has started, but not finished responding.
- **Opt-out:** This means that the invitee has opted out of the Quest.
- **Not responded:** This means that the invitee has not responded (yet).
- **Deleted:** This means that the personal data has been deleted (GDPR functionality).

By clicking , you may filter the list by response status. In the dialog that opens, simply provide the text you would like to filter by, and select the logic from the dropdown:

- **Is equal to:** This will only display response statuses that match the entire provided text string.
- **Is not equal to:** This will only display response statuses that don't match the entire provided text string.
- **Starts with:** This will only display response statuses that start with the provided text string.
- **Contains:** This will only display response statuses that contain the provided text string.
- **Does not contain:** This will only display response statuses that don't contain the provided text string.

## Date sent

This is the date the e-mail invitation was sent.

## Adding invitees

There are three ways of adding invitees to a Quest: Manually, from Contacts, and via file import (.xlsx or .csv). Please note that if your account has SMS distribution, you are able to add mobile numbers as well as e-mail addresses. The workflow would be the same.

## Manually

When you choose to add invitees manually, you are presented with a text box. To add the invitees, simply copy and paste their e-mail addresses into the text box, making sure that each e-mail address is separated by a line break. When you have copied and pasted all your invitees into the text box, simply click “Next”.

In the next dialog, you will be presented with the choice of whether or not to invite the invitees you are about to add via e-mail. If you would like to invite the invitees using our e-mail invitations, please make sure that the option “Yes, invite the added invitees via e-mail” is checked before you click “Finish”. If you would like to send the e-mail invitations later or not use our e-mail system, please make sure that the option “Yes, invite the added invitees via e-mail” is de-checked before you click “Finish”.

### Duplicate e-mail addresses

If you are trying to add more than one instance of an e-mail address, or the e-mail address you are trying to add has already been added to the Quest, you will be presented with the following choices:

- **Add only one instance of each e-mail address (no duplicates):** Selecting this option will make sure that you are neither adding the same e-mail address twice, nor adding e-mail addresses already added to the Quest.
- **Add all e-mail addresses (duplicates allowed):** Selecting this option will add all the e-mail addresses you have copied and pasted into the text box, regardless of the amounts of duplicates this will create.

PLEASE NOTE that by creating duplicates, the same invitee will be invited to the Quest more than one time.

### From Contacts

When you choose to add invitees from Contacts, you are presented with a list of all the contact groups you have access to. Simply select the contact groups you would like to invite, and click “Next”.

In the next dialog, you will be presented with the choice of whether or not to invite the invitees you are about to add via e-mail. If you would like to invite the invitees using our e-mail invitations, please make sure that the option “Yes, invite the added invitees via e-mail” is checked before you click “Finish”. If you would like to send the e-mail invitations later or not use our e-mail system, please make sure that the option “Yes, invite the added invitees via e-mail” is de-checked before you click “Finish”.

**Duplicate e-mail addresses**

If one or more of the invitees you are trying to add has already been added to the Quest, you will be presented with the following choices:

- **Add only one instance of each e-mail address (no duplicates):** Selecting this option will make sure that you are only adding new invitees to the Quest.
- **Add all e-mail addresses (duplicates allowed):** Selecting this option will add all selected invitees, regardless of the amounts of duplicates this will create.

PLEASE NOTE that by creating duplicates, the same invitee will be invited to the Quest more than one time.

**Import file**

When you choose to add invitees via file import, you have more options than when adding invitees manually or from Contacts. Most importantly, you have the option to import respondent data (please see “Using respondent data” below for more details about the benefits of respondent data).

When adding invitees via file import, you will first be asked to select the file. Please note that we only accept .xlsx and .csv files, and that you would have to structure the file so that each invitee occupies a separate row. If you would like to import respondent data, please add this as columns. This is an example of how to structure a file with the respondent data “Gender”, “Language”, and “Shoe size”:

<b>E-mail</b>	<b>Gender</b>	<b>Language</b>	<b>Shoe size</b>
---------------	---------------	-----------------	------------------



invitee1@email.com	male	en	43
invitee2@email.com	female	en	39
invitee3@email.com	female	nb	40
invitee4@email.com	male	nb	41
invitee5@email.com	female	en	38

When you have selected your file (and clicked “Next”), you will be presented with a preview of the first two rows of your file. We try our best to analyze your data and help you by providing appropriate default settings. If we are a bit off, feel free to modify the following setting:

- **First row contains headers:** When this option is checked, the first row of the imported file is treated as a header row (just like in the example above). When this option is de-checked, the first row of the imported file is treated just like the other data-containing rows.

If everything looks OK, click “Next” to continue.

In the next dialog, you will be asked to select the file headers you would like to import. If the file only contains a single e-mail column, we have probably already selected it for you. If the file contains more than one e-mail column, e.g. if the example above included a fifth column containing the e-mail addresses of the key account managers responsible for the different invitees, you will have to manually select the file header containing the e-mail addresses of the invitees. To do this, simply drag and drop the correct file header on top of the “Email” system field box in the “System Fields” pane.

If you would like to import all of the file headers as respondent data, simply click the “Add all” text on the bottom of the “File Headers” pane. If you would like to only import a couple of file headers as respondent data, simply drag and drop them onto the “Add New” box in the “Custom Fields” pane.

When you have moved the file headers you would like to import from the “File Headers” pane to the “Custom Fields” pane, feel free to give them new names using the text boxes next to each entry in the “Custom Fields” pane. PLEASE NOTE that the respondent data will carry the name you provide here.

If you would like to be able to base analyzes on the data from a particular file header, please make sure that the “Filterable” checkbox is checked for that field. When a field is filterable, it is treated as a question with fixed answer alternatives, making it possible to create analyzes from it as well as to display the data in chart form. When a field is not filterable, it is treated as an open answer question.

PLEASE NOTE that the data added as custom fields, will be imported as respondent data and added to the Quest as hidden questions.

When you have made your selection and reviewed the settings, please click “Next” in order to proceed to the next step.

In the next dialog, you will be presented with the choice of whether or not to invite the invitees you are about to add via e-mail. If you would like to invite the invitees using our e-mail invitations, please make sure that the option “Yes, invite the added invitees via e-mail” is checked before you click “Finish”. If you would like to send the e-mail invitations later or not use our e-mail system, please make sure that the option “Yes, invite the added invitees via e-mail” is de-checked before you click “Finish”.

### **Duplicate e-mail addresses**

If one or more of the invitees you are trying to add have already been added to the Quest or exist as multiple instances in the file you are about to import, you will be presented with some of the following choices depending on the situation:

- **Import new invitees only (no duplicates):** This will only import invitees not already imported. If one or more of the invitees you are about to import already have been added to the Quest, they will not be imported this time.
- **Import new invitees and update existing respondent data (no duplicates):** This will only import invitees not already imported. If one or more of the invitees you are about to import already have been added to the Quest, they will have their

previously uploaded respondent data updated with the respondent data from the file.

- **Update existing respondent data only (no duplicates):** This will not import any new invitees from the file, but only update the respondent data for invitees already added to the Quest with the respondent data from the file.
- **Import all invitees and create duplicates if they exist (duplicates allowed):** This will add all invitees from the file. If one or more invitee has already been added to the Quest, he or she will be added as a duplicate. This option will not edit any previously uploaded respondent data.
- **Import new invitees and update existing respondent data. Update the last of the duplicates if they exist (duplicates allowed):** This will add new invitees and update any existing. If there are duplicates in the file, the last one will be used. If there are duplicates on the server, the latest one will be updated.

PLEASE NOTE that if you already have duplicate invitees in the Quest, you will not be able to update any respondent data using the import functionality.

## Using respondent data

When you import respondent data, each data field will be added as a hidden question at the end of your Quest. The questions will not be visible to the respondent when he/she responds to the Quest, but they will be “answered” using the imported data for each individual respondent. As a result of this, the data can be included in your reports, and given that you have made the data “filterable” (see “Import file” above for more details), you may create analyses from the data (please see “Analyses” in this user manual for more details on how to create an analysis). Another use of imported background data, is customizing invitation e-mails, notification messages, question texts, and additional information. To do this, simply provide the appropriate data tag, e.g. [!Email!], to the desired text field. When the text is presented to the invitee, we will substitute the data tag with the respondent data corresponding with the invitee. To view the data tags available in your Quest, simply open one of your invitees from the invitees list (click the invitee’s e-mail address in the list). The data tags are then to be found next to each imported data field. Please note that you would have to provide the entire data tag, i.e. including the “[!” and “!]”, in order for it to be substituted with actual data.

Here's a simple example of one way of using respondent data: Given that you have imported a data field containing the invitees' names, and this custom field was given the name "Name", you can make the e-mail invitation messages more personal by using the data tag "[!Name!]". If you provide the following invitation message: "Hi [!Name!], please be nice and answer this short survey", the invitees will receive a message with their own name inserted, e.g. "Hi Jane, please be nice and answer this short survey".

## Multi-lingual Quests

When importing data via file in multi-lingual Quests, you have the option of specifying the invitation language in the file. If you would like to use this option, please make sure to add a language column in your file, and to specify it using either the ISO 639-1 or ISO 639-3 standard. When you import the file, simply select "Distribution language is specified in the file" from the "Distribution language" dropdown, and make sure to verify that the correct language file header is added as the "Language" system field when adding the file headers later in the dialog.

For a complete overview of the ISO 639-1 and ISO 639-3 language codes, please visit:  
<http://www-01.sil.org/iso639-3/codes.asp>

## Distribute by E-mail Invitation

**Name:** This is the input field for the name of the person inviting to the Quest.

**From:** This is the from address, i.e. the address the e-mail is being sent from. This will always be "feedback@questback.com"\*

**Reply-to:** This is the address that will be inserted in the "to" field if the recipient decides to reply to the e-mail. It will also – depending on the e-mail client in use – be visible along with the name provided in the "name" field in the recipients' e-mail client.


\* If you would like to send from a custom e-mail address, please have your system administrator contact Questback support to enable the feature Custom sender address. Please note: in order to use a custom sender address, your system administrator will have to set up an SPF and DKIM record in your domain approving Questback IPs. Our support team have detailed information on how to carry out with this.

**Language:** If you have a single language Quest, this displays only the default language. If you have a multilingual Quest, a second column appears, showing the additional languages.

PLEASE NOTE that only one additional language is shown at a time. To edit another additional language, please select it from the dropdown menu.

ALSO NOTE that only languages added as additional languages on the "Languages" page, can be chosen in the dropdown menu.

**Invitation Subject:** This is the "subject" field in the generated e-mail message.

**Invitation Body:** This is the main text in the invitation, the body of the e-mail message. If you prefer to work in the advanced text editor, simply click .

By default we will create a “Click here to participate” button directly beneath the invitation body. If you would like to place the button somewhere inside the body text, please use the dropdown menu in the text editor to manually position the invitation link:

- **Position as button:** This adds the tag [BUTTON] for a button with the text “Click here to participate”. When clicked, the respondent will be taken to the Quest.
- **Position as clickable text:** This adds the tag [ANCHOR] for a link with the text “Click here to participate”. When clicked, the respondent will be taken to the Quest.
- **Position as link:** This adds the tag [LINK] for a link to the Quest. When clicked, the respondent will be taken to the Quest.

All 3 tags can be placed anywhere in the body of your email invitation and reminders.

PLEASE NOTE: in case you would not like the default texts for the buttons and the clickable text (i.e. “Click here to participate”), you can insert the following tags with the syntax included to define your own wording:

- For buttons: add the tag [BUTTON text="This is your button text"], where you would add your own button text between the quotation marks, currently with "This is your button text" as placeholder.
- For links: add the tag [ANCHOR text="This is your link text"], where you would add your own link text between the quotation marks, currently with "This is your link text" as placeholder.

In cases where you would like to send out an email invitation or reminder without any button or link to the quest, you could add the following tag: [BUTTON visible="false"],

You can at any time preview the invitation message by providing your e-mail address to the input field directly below the invitation body before clicking "Send preview".

**Reminder:** With reminders, you can automatically remind respondents that have not responded after a certain amount of time. To set up reminders, just enable the option "The Invitation has Automatic E-mail Reminders".

**Reminder Subject:** This is the "subject" field in the generated e-mail message.

**Reminder Body:** This is the main text in the reminder, the body of the e-mail message.

For information about the placement of the link, please refer to the invitation section above.

**Send Reminder:** Here you decide when to send the reminders.

To send a reminder on a **specific date and time**, just select the desired date and time in the respective dropdowns,

To send a reminder **after an interval**, just select the desired amount of days in the dropdown menu, and select the time in the day when the reminder is to be sent.

**TIP:** In running Quests, we only recommend sending out reminders after an interval, as this makes every respondent receive the same amount of reminders after the same amount

of time following their initial invitation. If you, on the other hand, were to manually add a new reminder date every time you add a new respondent, you would not only remind the newly added respondents, but every respondent in the list that has not yet submitted an answer.

Currently active reminders are shown in a list. To delete a reminder, simply select it in the list and click "Delete Selected Reminders".

### **Quarantines and Delays for Email Invitations**

When setting up an email invitation, you have the option to define the invitation routines in some more details:

**The quest has quarantine period for email invitations:** with this option, you can define a time interval during which the same email address is not to be invited again to the quest. When an email address is uploaded that falls under the set quarantine rules, it is added to the invitee list but flagged separately as “discarded by quarantine”

**The quest has default delay on email invitations:** with this option, the send-out of email invitations is delayed by the defined interval, e.g. by 15 minutes or 3 hours. This delay option is typically used in scenarios where respondents are uploaded via an automated integration, and where there needs to be a delay between upload and invitation send-out.

### **Distribute by Link**

If you would like to distribute your Quest by a link that you can embed on your website, in your blog etc., just enable the option "**Distribute by Link**". This generates a link that you can copy and paste according to your needs.

**Display Obligatory E-mail Input Field:** By enabling this option, the respondents following the link must provide their e-mail addresses at the very beginning of the quest. This is essential for your ability to initiate follow-up activities with those respondents.

PLEASE NOTE if the option “Display Obligatory E-mail Input Field” is not activated, all incoming responses via this link will technically be linked to a default system email

address "[distbylink@questback.com](mailto:distbylink@questback.com)". This means that these responses appear to come from the email address "[distbylink@questback.com](mailto:distbylink@questback.com)" in reports and follow-up, unless the quest is conducted with hidden identity. In addition, two-way follow-up dialogs with these respondents will not be supported, as the system does not know their real email addresses.

## Pop-Up script

If you would like to embed the Quest as a pop-up on your website, you can obtain an easy to use pop-up script by clicking the "Get Pop-Up Script" button. Please see the separate helpfile available from the "Get Pop-Up Script" dialog for more details on how to use the script.

## Distribute by SMS invitation (only for accounts with SMS distribution)

**Sender Name:** This is the name you want to appear in the "from" field in the generated SMS message.

**Language:** If you have a single language Quest, this displays only the default language. If you have a multilingual Quest, a second column appears, showing the additional languages.

PLEASE NOTE that only one additional language is shown at a time. To edit another additional language, please select it from the dropdown menu.

ALSO NOTE that only languages added as additional languages on the "Languages" page, can be chosen in the dropdown menu.

**Estimate number of invitation messages:** Click this to get an overview of the number of SMS messages that will be sent. Please note that the numbers presented are a result of an estimation, and that the actual numbers may deviate from this. This becomes especially relevant if your SMS message contains respondent data tags.



**Invitation Body:** This is the invitation text. Please note that we will insert a short invitation URL at the end of the invitation text when sending the SMS message.

**Send Preview:** To preview the invitation message, simply provide a mobile number in the small input field and click “Send Preview”. This will send a preview of the SMS message to the provided mobile number.

**Reminder:** With reminders you can automatically remind respondents that have not responded after a certain amount of time. To set up reminders, just enable the option "The invitation has automatic SMS reminders".

**Reminder Body:** This is the main text in the reminder. Please note that we will insert a short invitation URL at the end of the reminder text when sending the SMS message.

**Send Preview:** To preview the reminder message, simply provide a mobile number in the small input field and click “Send Preview”. This will send a preview of the SMS message to the provided mobile number.

### **Quarantines and Delays for SMS Invitations**

When setting up an SMS invitation, you have the option to define the invitation routines in some more details:

**The quest has quarantine period for SMS invitations:** with this option, you can define a time interval during which the same mobile phone number is not to be invited again to the quest. When a mobile phone number is uploaded that falls under the set quarantine rules, it is added to the invitee list but flagged separately as “discarded by quarantine”

**The quest has default delay on SMS invitations:** with this option, the send-out of SMS invitations is delayed by the defined interval, e.g. by 15 minutes or 3 hours. This delay option is typically used in scenarios where respondents are uploaded via an automated integration, and where there needs to be a delay between upload and invitation send-out.

## Distribution Log

In the distribution log you have access to an overview of what have happened to the e-mail invitations you have sent out, as well as the ratio between uncompleted (partial) and completed responses resulting from both e-mail distribution and link distribution. You will also have access to information about the device used by the respondent when answering the Quest. Depending on the distribution method activated, you will have access to the following information in both chart and tabular form, plus an extra table with the distribution history and list with the amount of invitations/reminders sent per day.

### Distribution by E-mail

This chart gives an overview of what have happened with the e-mail invitations.

- **Scheduled for delivery:** This is the amount of e-mails not yet sent to the e-mail server responsible for sending out e-mail messages.
- **Soft bounced:** These are e-mail messages that failed to reach the recipient. Even though delivery failed this time, future deliveries to the same e-mail address might succeed. The reasons for being categorized as soft bounced are temporary failures like full recipient mailbox, disabled recipient mailbox, recipient mail server continuously asking us to “try later”, etc.
- **Hard bounced:** These are e-mail messages that failed to reach the recipient. Future deliveries to the same e-mail address will also fail. The reasons for being categorized as hard bounced are permanent failures like invalid e-mail address or invalid e-mail domain, message rejected errors like blacklisting, inappropriate content, too many connections in a period of time, receiving server unable to accept e-mail for the destination domain, or communication failures like not being able to connect to recipient server.
- **Delivered:** This is the amount of e-mail addresses that were delivered.\*

In the center of the chart, you will see the total amount of invitation e-mails in the Quest.

\* **DISCLAIMER:** Since we rely on the receiving server to send us error notifications when it rejects a message, this number might be artificially high in the rare cases when the receiving e-mail server is configured not to send error notifications.

## Responses from E-mail Distribution

This chart gives an overview of what the delivered e-mail invitations have resulted in.

- **Completed:** This is the amount that has submitted a complete response to the Quest.
- **Uncompleted:** This is the amount that has started but not finished responding to the Quest.
- **Opt-out:** This is the amount that has opted out of the Quest.
- **Not responded:** This is the amount that has neither responded nor opted out of the Quest.

In the center of the chart, you will see the total amount of delivered invitation e-mails.

## Responses from Link Distribution

This chart gives an overview of the response resulting from link distribution.

- **Completed:** This is the amount that has submitted a complete response to the Quest.
- **Uncompleted:** This is the amount that has started but not finished responding to the Quest.

In the center of the chart, you will see the total, i.e. the number of completed and uncompleted responses combined.

By using the tabs on top of the distribution log, you may switch between charts and tabular view of the data.

## Distribution by SMS

This chart gives an overview of what have happened with the SMS invitations.

- **Scheduled for delivery:** This is the amount of SMS messages not yet sent.
- **Delivered:** This is the amount of SMS messages that were delivered.
- **Failed:** This is the amount of SMS messages that we failed to deliver.

## Responses from SMS distribution

This chart gives an overview of what the delivered SMS invitations have resulted in.

- **Completed:** This is the amount that has submitted a complete response to the Quest.
- **Uncompleted:** This is the amount that has started but not finished responding to the Quest.
- **Not responded:** This is the amount that has neither responded nor opted out of the Quest.

## Device type

This chart gives an overview of the type of device used when answering the Quest:

- **Mobile:** This is the amount that has submitted a response from a mobile device.
- **Desktop:** This is the amount that has submitted a response from a desktop computer.
- **Unknown:** This is the amount that has submitted a response from an unknown device.

## Exporting E-mail Addresses

To export a list of the e-mail addresses belonging to any of the categories described under “Distribution by E-mail” and/or “Responses from E-mail Distribution” (see above section for details), simply click the “Export” button at the bottom of the Distribution Log and select your preferred format. Upon selecting the format, you will be presented with a

dialog box where you can select the categories to include. After you have made your selection, simply click “Export”, and the file will be offered as a download in your browser.

PLEASE NOTE that you will not be able to export e-mail addresses if hidden identity is activated.

## Notifications

With notifications you have the ability to have an e-mail message sent to a recipient of your choice either each time a respondent answers or when a specific answer is given. This is a very useful feature if you want to quickly be able to act, e.g. initiate follow up activities, or just keep an eye on some answers.

On the Notifications page you are presented with an overview of all the notifications set up in your Quest. Each notification can be expanded and collapsed to either show or hide its settings.

To **select** a notification, simply check the checkbox to the left of its name.

To **activate** or **deactivate** a notification, simply make a choice in the dropdown menu to the right of the notification name.

To **delete** a notification, simply select it and click "Delete".

To **duplicate** a notification, simply select it and click "Duplicate".

To add a new notification, simply click "**Add notification**". You will then get the following choice:

- **Email with follow-up:** Selecting this will set up a notification email with a button to initiate a follow-up activity with the respondent (see section “Follow-up” for more info on the follow-up functionality).
- **Email:** Selecting this will set up a notification email without a follow-up button, i.e. just an email message. If you would like to include the questions and answers in the email, simply add the tag “[RECEIPT]” to the body of the email message.

When you expand a notification (to expand a notification, just click the triangle to the left of the name), you are presented with a set of settings:

**Send Notification:** This describes when a notification is to be sent. The default is to send the notification every time someone responds. To make the notification conditional, i.e. to only send it if the response matches a certain condition (e.g. particular answer to one or more questions), simply create a condition. When the condition is created, the notification will only be sent when the response matches the set condition.

If you would like to go back to sending the notification every time someone responds, simply remove the active condition.

**Notification Name:** This is the name of the notification.

**From:** This is the e-mail address listed as sender of the notification e-mail. PLEASE NOTE that this is locked to "noreply@Questback.com"

**To:** This sets the recipient of the notification e-mail. You can choose between:

1. **User Specified Recipient:** This option opens a field for manually providing the recipients' e-mail addresses.
2. **Respondent:** This option sends the notification message to the respondent.
3. **Recipient specified in open answer question:** This option sends the notification to an e-mail address provided in an open answer question. Only questions of the type open answer short with format set to "E-mail" will be available in the dropdown.
4. **Recipient Specified in Respondent Data:** This option lets you select a recipient based on information stored in the respondent data. This is a very powerful feature, allowing you to specify the notification recipient for each individual respondent. A possible use for this feature is for instance when you want to notify the key account manager connected to each respondent. For more information on respondent data, please refer to "Respondent Manager" under "Distribution" in this manual.

When you select this option, a dropdown menu appears, allowing you to select the respondent data tag connected to the e-mail addresses.

PLEASE NOTE that you must have uploaded a respondent data file containing a separate column of recipient e-mail addresses to use this feature.

**Language:** If you have a single language Quest, this displays only the default language. If you have a multilingual Quest, a second column appears, showing the additional languages.

PLEASE NOTE that only one additional language is shown at a time. To edit another additional language, please select it from the dropdown menu.

ALSO NOTE that only languages added as additional languages on the "Languages" page, can be chosen in the dropdown menu.

**Notification Subject:** This is the "subject" field in the generated e-mail message.

**Notification Body:** This is the main text in the notification, the body of the e-mail message.

## Test & Publish

**Validate Quest:** This performs a validation of your Quest, detecting any critical errors. PLEASE NOTE that only technical errors (e.g. routing problems etc.) are discovered. The validation does not detect content errors.

**Open Test Quest:** This lets you test your Quest. During testing the Quest behaves just like if it is published, i.e. both routing and special actions are fully functional, and the response is recorded and made available on the Results page. Features relying on respondent data (such as some notifications or question hidings), however, will not be functional during testing.

**View Test Report:** This shows you the test data on the Results page. (At least one test Quest must be completed for this button to be available.)

**Delete Test Data:** This deletes the stored test data. (At least one test Quest must be completed for this button to be available.)

**Preview Quest:** This lets you preview your Quest without recording your response. If you want to record the response, please click "Open Test Quest".

**Publish:** This publishes your Quest. (PLEASE NOTE that any stored test data will be deleted upon publishing the Quest.)\*

**Stop:** This deactivates your Quest. (PLEASE NOTE that the Quest must be active for this button to be available.)

### **\* Approval process (add-on enabled by request)**

When this feature is enabled, an embedded approval process is introduced on the account in order to meet corporate needs such as:

- Designer users that work locally have the right to create own surveys, but need to submit them first for (internal) approval before they can publish and launch them.
- Super users that typically work in a central role receive the (internal) approval requests and review the draft survey. If all their (internal) quality requirements are met, the super users approve the survey so that the designer user can publish it.

When the approval process add-on is activated, all designer users get a "Request Approval" button, instead of the "Publish" button. In addition, the designer users get a mandatory dropdown list with all super users when submitting a Quest for approval, and need to select one of them. Once the selected super user has approved the Quest, the designer user will be free to publish it.

NOTE: This feature isn't enabled by default. Please contact us in order to enable it.



## Availability

Here you decide when the published Quest is to become available to the respondents (i.e. activated).

**Immediately:** This makes the Quest available immediately after publishing it.

**On a Specific Date/Time:** This automatically makes the Quest available on a date/time of your choice. To set the activation date/time, simply click the calendar icon that appears.

**This Quest has an expiration date/time:** By enabling this option you can set an expiration date upon which the Quest is automatically made unavailable (i.e. deactivated).

Please note: the date/times you select for your availability period are displayed in the time zone you selected in your user profile.

## Reports

When it's time to have a look at the results from your Quest, or set up the way you would like to view the results as they come in, it's time to enter Reports.

The Reports page presents you with a list of all the reports contained within the Quest. If the Quest is a shared Quest, all the reports contained within it will be shared among the same users that are sharing the Quest. A shared report can be edited by all users with access to it, making collaboration a breeze. If the Quest doesn't contain any reports, a default report containing all of the questions from the Quest will be created for you the moment you access the Reports page.

The Reports page is divided in two sections:

### 1. Action Buttons

**New Report:** Clicking this will open a wizard, helping you create a new report. For more information on the wizard, please see "Creating a new report" below.

**Delete:** Clicking this will delete the reports currently selected in the report list. If no report is selected, this button will be disabled (greyed out).

Tip! It's possible to delete several reports in one go by selecting more than one prior to clicking "Delete". Please note that you are only allowed to delete your own reports.

**Duplicate:** Clicking this will duplicate (i.e. make a copy of) the reports currently selected in the report list. If no report is selected, this button will be disabled (greyed out).

Tip! It's possible to duplicate several reports in one go by selecting more than one prior to clicking "Duplicate".

The duplicate reports will have a number appended to their name, making it easy to separate them from their originals. You are of course more than welcome to rename these reports (see "Report Settings" in this user manual for more info on how to rename a report).

**Batch Copy:** Clicking this will open a wizard, helping you make several copies of the selected report, all with a different filter or comparison applied. In the wizard, simply select the filters and/or comparisons you would like to create a copy with. Please note that each selected filter and comparison will result in a separate copy with the filter or comparison applied to all the questions in the report. In the copies, the selected filter or comparison will therefore replace any filters or comparisons that were applied to the original report.

If you would like to apply an interval filter to all copies (this will be applied in addition to the selected filter or comparison), simply check "Apply interval filter to all versions", and then select an interval filter from the dropdown that appears.

When you have made your selection, simply click "Next".

On the next page of the wizard, you will have access to the LiveReport settings for the reports you are about to create.

**Status:** This sets the availability of the LiveReport. (1) “Private” means that the LiveReport only will be visible to logged in users with whom the Quest is shared. (2) “Public” means that the LiveReport is available to everyone in possession of its URL. To restrict a public LiveReport’s audience, simply protect it with a password.

**Require Password:** This will protect the LiveReports with a password. To use the same password for all the LiveReports, simply select “Use same password for all LiveReports”. Feel free to modify the password in the input field that appears. If you would like the system to generate a unique password for each LiveReport, simply select “Use unique password for each LiveReport”. The system will then create a unique, strong password for each of the LiveReports you create. The passwords will be available for you to download in an Excel file after you have completed the wizard.

**Display time last updated:** Selecting this will display a timestamp in the LiveReport, telling the viewer when the data was last updated.

**LiveReports:** These are the names of the copies (and LiveReports) you are about to create.

When you are satisfied with the settings, simply click “Finish” to create the copies.

**Export:** Clicking this will open a wizard, helping you export the selected report. For more information on exporting, please see the section "Exporting" in this user manual. If no report (or more than a single report) is selected, this button will be disabled (greyed out).

**The Search Field:** Simply start typing in this field to narrow down the reports displayed. The search will search through all the columns of the report list as you type, making it incredibly easy to locate a particular report.

## 2. The Report List

This list contains all of the reports in the Quest. To open a report in Report Designer, simply click its name in the list. To sort the list by a particular column, simply click the column name once and a small arrow indicating the sorting order will appear (upward pointing equals ascending order, downward descending). To reverse the sorting order,

simply click the column one more time. To stop sorting by the column, simply click once more to make the small arrow disappear.

**TIP!** To decide on a column by which to sort if the primary sorting column contains reports with the same data, e.g. the same owner, simply click on the name of a second column. Notice that both columns will display a small arrow, indicating that the list is sorted by these columns.

If you previously have exported one or more report using the download link (see “Exporting” below for more details), you will have access to these by clicking “View available exported files”. From the list, you are then able to download any previously generated file – directly in the browser.

### **What’s in the Columns**

**Status:** This displays the availability of the report. It can have two states: (1) “Private” means that the report only will be visible to logged in users with whom the Quest is shared. (2) “Public” means that the report is available via the LiveReport, so anyone in possession of the LiveReport URL is able to view it. To restrict the audience, simply password-protect the LiveReport (see “Report Settings” for more information on this).

**Name:** This displays the name of the report. Clicking a report name will open that particular report in Report Designer.

**Created by:** This displays the user who created the report, and therefore is considered the report owner.

**Last modified:** This displays the date and time of the last edit.

**Shortcut column:** This contains two convenient shortcuts: (1) Preview LiveReport (this lets you preview the report’s LiveReport, the best way of viewing a report), and (2) Report settings (see the section “Report Settings” for more information on this).

## Creating a New Report

Upon clicking “New Report”, you will encounter a two-paged wizard, designed to guide you through the process of setting up a new report:

### Page 1

Here you can set the availability and behavior of the report’s LiveReport:

**Status:** This sets the availability of the LiveReport. (1) “Private” means that the LiveReport only will be visible to logged in users with whom the Quest is shared. (2) “Public” means that the LiveReport is available to everyone in possession of its URL. To restrict a public LiveReport’s audience, simply protect it with a password (see below for more details). To distribute the URL, simply copy it from the “Report Settings” dialog (see “Report Settings” in this user manual for details), and paste it into e.g. an e-mail message.

**Require Password:** This will protect the LiveReport with a password of your choice. In order to access the LiveReport, the audience would have to know both the URL and the password. To better protect your data, we always recommend using a strong password for the LiveReport.

**Display time last updated:** Selecting this will display a timestamp in the LiveReport, telling the viewer when the data was last updated.

When you are satisfied with the settings on page 2, simply click “Next” to proceed to the next page.

**Layout:** This controls the layout of the LiveReport. If you would like to create a traditional LiveReport, simply select “One chart per page”. This will present each chart on a separate page. If you would like to present multiple charts on one page, simply select “Single page”, and choose your preferred amount of columns from the dropdown that appears.

## Page 2

This is where you would have to give the report a name. When done, simply click “Save” in order to create the report and get started adding content in Report Designer.

Please note that if you are working with a multilingual Quest, a language dropdown will be available next to the “Report Name” input field. Please use this to provide the report name in the different languages. If you do not provide the report name in a particular language, it will be displayed in the default language.

## Report Designer

To open a report in Report Designer, simply click on its name in the Report list.





Just like Quest Designer, Report Designer is divided in three main areas:

### 1. The Question List

The question list contains all the elements included in your report. To add elements to the report, please click the “Add Questions” button (see the section “The Action Buttons” below for details).

To open a list element in the working area, simply click on it. The list element currently open in the working area is highlighted.

If you hover over an item in the question list, you will have access to a set of functions:

-  Move the item up. You may also move the item up by clicking and dragging its “drag handle” (dotted area to the left of the item).
-  Move the item down. You may also move the item down by clicking and dragging its “drag handle” (dotted area to the left of the item).
-  Duplicate the item.
-  Remove the item from the report.

## Multilingual Reports

When working with a multilingual report, a language dropdown will be available at the top of the question list. Please use this to view the different languages, and to provide any additional information, comments, etc. in more than one language:

1. Click on a list element containing translatable text (text items or questions).
2. View or modify the text in the default language in the working area.
3. Choose another language from the language dropdown.
4. Provide the translated text in the working area.
5. If the report contains more than one additional language, repeat step 3 and 4.

## 2. The Action Buttons

The action buttons are used to perform global actions to the open report.

**Add:** Clicking this will give you the following options:

- **Add questions:** Lets you select the question(s) you would like to add to the report.
- **Add text item:** Lets you add a text to the report.
- **Add response log:** Lets you add a response log to the report.
- **Add section:** Lets you add a section with its own heading to group items in the report.  
NOTE: this is only available for single page reports.
- **Add index:** Lets you add an index to the report. An index is a feature where you can select a number of questions, and have their average calculated and displayed as one average. The index is calculated as follows: *The average of each included question is multiplied with the weight the question is given. The sum of all these averages are then divided by the sum of all the weights.*
- **Add score:** If you have used scoring in the Quest, you'll be able to add the following items via this option (NOTE: scoring is only available on Silver and Gold accounts):
  - **Respondent scores:** This will add a list of the respondents and their achieved score to the report. <sup>[1]</sup><sub>SEP</sub> You may add filters to narrow down the list, but you will not be able to apply additional series (comparisons or cross tabulations) to this item.
  - **Score statistics:** This will display the average score obtained (in the Quest) as a chart/table. You may add filters and/or additional series (comparisons) from other score statistics items.

**Export:** Clicking this will open the export wizard, guiding you through the process of exporting your report. Please see the “Exporting” section in this user manual for more information on exporting reports.

**Report Settings:** Clicking this will open the report settings. Please see the “Report Settings” section in this user manual for more information.

**Save:** Clicking this will save your changes to the report. If you have not made any changes to the report since the last time it was saved, this button will be disabled (greyed out).

PLEASE NOTE: Just like in Quest Designer, all changes will be automatically saved if you have enabled auto save in your user settings.

**Cancel:** This will discard any unsaved changes, reverting the report to the last saved state. If you have not made any changes to the report since the last time it was saved, this button will be disabled (greyed out).

PLEASE NOTE: Just like in Quest Designer, all changes will be automatically saved if you have enabled auto save in your user settings. If you are about to make radical changes to your report, we recommend that you work on a duplicate.

**Preview LiveReport:** This will open the report’s LiveReport in a new window. Please see the “LiveReport” section in this user manual for more information.

### 3. The Working Area

The working area will always display the item currently selected in the question list, and the available controls will vary with the kind of item selected. We have gone to great lengths trying to make the report design process as simple and fluid as possible by dynamically hiding non-applicable options, e.g. pie charts in multiple choice questions, cross tabulations in reports with comparisons etc.



## Text Item

If you select a text item, the working area will display two input fields:

**Heading:** This is the heading text of the text item. TIP! In order to increase readability, try to keep your headings short and to the point.

**Body:** This is the body text of the text item. This is where you would add the main content of the text item.

Text items are perfect for adding e.g. an introduction or summary to the report, adding comments between questions, or providing the viewer with essential background information about the survey.

TIP! When working with multilingual reports, you can use the language dropdown above the question list to edit the text in a different language.

## Response Log

If you select the response log, the working area will display the response log. Here you can see the number of responses received each day the Quest has been available.

## Questions

If you select a question, the working area will be divided into four sections:

### Series

In this section, you have control over which data to present in the chart. Each data series is represented by a box with tools for filtering the data. Inside the box you have access to the following:

- **Quest:** This is the Quest the data is coming from.
- **Question:** This is the question the data is coming from. For additional series, you may select a particular question, or the option “corresponding question”. By

selecting “corresponding question”, you will be comparing the question with the same question, given that the selected Quest is identical. Please note: we don’t recommend using “corresponding question” unless you are comparing with a Quest where the question types are the same and in the same order.

- **Filters:** This section contains the controls for applying filters to the data series
  - **New Filter:** This triggers the New filter dialog, and will automatically apply the created filter to the series when completed. See “Creating filters” below for more information on the process of creating filters.
  - **Value filter:** This is for applying an existing value filter to the chart.
  - **Interval filter:** This is for applying an existing interval filter to the chart.
  - **Manual filter:** This is for applying an existing manual filter to the chart. For more info about manual filters, please see the section ”Follow-up” in this user manual.
  - **Apply filters to all series:** This is only available for the root series of a comparison, and is de-selected by default. When de-selected, any filters applied to the root series will only be used to filter the data in that series. When selected, any filters applied to the root series will also be applied to the additional series – on top of any filters currently applied to these.

Example: If you compare a question with itself, and have e.g. the filters “Norway”, “Finland” and “Denmark” applied to the additional series and the filter “female” on the root series with “Apply filters to all series” de-selected, the chart will display the following series: all females regardless of country, all respondents from Norway regardless of gender, all respondents from Finland regardless of gender and all respondents from Denmark regardless of gender. If you do the same with “Apply filters to all series” selected, the chart will display the following series: all females regardless of country, all females from Norway, all females from Finland and all females from Denmark.

### Action buttons

- **Add series:** This contains the tools for adding additional data to the chart/table. It contains the following:
  - **Add comparison:** This adds an additional data series to the chart. By default, the added series displays data from the same Quest and question, but you are free to

select other Quests and/or questions as well as to apply filters. To add more data series, simply click this option again.

- **Add batch comparison:** This is a tool designed to help you quickly add multiple series (with data from the same Quest and question) but with different filters. This is an easy way of quickly comparing different filters, or simply getting a head start setting up multiple series that you continue to modify according to your needs.
- **Add cross tabulation:** This adds a cross tabulation to the question. When adding a cross tabulation, you'll get access to a dropdown for selecting the question you would like to cross tabulate against. If you would like to display only selected answer alternatives from this question, simply click "Select answer alternatives to show" and de-select the alternatives you would like to hide.
- **Load comparison:** This is for loading a previously saved comparison. Please see "Save comparison" below for more info.
- **Apply to other questions:** This is for applying the settings, including filters and any additional data series (comparison or cross tabulations), to other questions in the report.
- **Clear all series:** If you have one or more additional series added, you can use this button to quickly remove these.
- **Save comparison:** If you have one or more additional series added, you can save these as a preset for easy re-use in other reports (from the same Quest).

## Creating filters

### Value filter

When setting up a value filter, you get the following options:

- **Create one or more single-condition filters:** Select this option if you would like to create one or more filters based on only one criterion. When you have selected this, each answer alternative you select in the following dialog will result in a separate filter filtering down the responses to only those that have answered the selected answer alternative. If you e.g. select "male" and "female" from a question about gender and "Norway" and "Finland" in a question about country, you will

create four filters, one filtering down the answers to only the male ones, one filtering down the answers to only the female ones, one filtering down the answers to only the Norwegian ones, and one filtering down the answers to only the Finnish ones.

- **Create one multi-condition filter:** Select this option if you would like to create a filter with more than one condition. When you have selected this, each answer alternative selected from the same question will result in an "or" logic, whereas answer alternatives selected from different questions will result in an "and" logic. If you e.g. select "male" and "female" from a question about gender and "Norway" and "Finland" in a question about country, you will create a single filter, filtering down the answers to the ones coming from either male or female respondents that live in either Norway or Finland.

### **Interval filter**

Setting up an interval filter is as simple as defining the interval you would like to filter down the responses to. When using an interval filter, the responses displayed will be limited to the ones received within the defined time interval.

### **Display Settings**

This is where you determine how the question is to be presented in the report.

**Chart Type:** This is where you set the chart type for the question. PLEASE NOTE that we have made it easier for you to decide on a chart type by hiding chart types incompatible with the chosen question.

**Show Data as:** This is where you set the data format (i.e. x-axis value) for the question. We offer three different data formats: values (i.e. the response count), percent (i.e. percentages), and average (i.e. the average value).

**Show Data Labels in Chart:** Enabling this will add a badge to each series, displaying its value.

**Show Statistical Table:** Enabling this will add a table under the chart, displaying the total amount of respondents, the mean, the median, and the standard deviation.

**Show Chart Legend:** Enabling this will replace the series names on the x-axis with numbers. A table explaining the numbers will be added beneath the chart. TIP! This is the perfect way of cleaning up charts with long answer alternative texts.

**Chart Colors:** This is where you set the colors of the chart. Single color allows you to specify a color to be used on the entire chart, whereas Color scheme allows you to select one of our pre-defined color schemes.

**Use in Other Questions:** The display settings will only affect the selected question. To apply the display settings of a particular question to other questions, simply click this button and select the questions to which you would like to apply them in the dialog box that appears. PLEASE NOTE that some settings are incompatible with certain question types. If you try to apply incompatible settings to a question, the default settings will be applied instead.

**Show average value only:** With this option the average of a full matrix question will be displayed as a single average value. The average value is calculated from all responses to all of the sub questions in the matrix, i.e. it is not an average of the sub questions' averages. This option is only available for matrix questions.

**Sorting:** This is for setting the order in which the answer alternatives are presented in the chart. To make them appear in the same order as they appeared in the Quest, simply select "Default order". To make them appear in alphabetically order, simply select "Alphabetically A -> Z" or "Alphabetically Z -> A". To sort them by answer count, simply select "Answers smallest to largest" or "Answers largest to smallest". You may also choose to display the answer alternatives in a reversed order, by selecting "Reversed default order".

**Select answer alternatives to show:** Using this function, you can opt to only display a subset of the answer alternatives. Highly useful for narrowing the focus in questions with a high amount of answer alternatives.

## Display

This is where you will see your chart as it will appear in the LiveReport.

**Additional Information:** To add some text above the chart, simply enable this option and provide the text in the text editor that appears. PLEASE NOTE that if the question contained additional information in the Quest, the same text will be applied to this field by default. If you would like to hide the text from the report, simply disable this option. If you decide on modifying the text applied by default, the modifications will only be visible in this individual report.

**Comments:** To add some text below the chart, simply enable this option and provide the text in the text editor that appears.

**Chart tab:** Here you'll see the results in a chart.

**Table tab:** Here you'll see the results in a table.

**Text tab:** Here you'll see any free text input.

TIP! to follow-up with the respondent behind a particular free text answer, simply click on the answer to open the respondent up in the Feedback module. Please see "Feedback" in this helpfile for more information on the follow-up functionality.

For NPS™ questions the chart will display data following regular NPS™ standards, i.e. the NPS™ score as well as a breakdown of respondents into "Detractors", "Passives", and "Promoters".

## Label Editor

In this section you have the ability to edit a selection of texts and labels that are displayed in the report. Depending on the question type selected, you will have access to one or more of the following tabs:

**Question Text:** Here you have access to an input field for editing the question text of the currently selected question. This is useful if you e.g. would like to shorten the text in order to improve the layout and readability of the report.

If you have applied a comparison to the selected question, you will also have access to input fields for editing the name of the different series in the chart/table.

PLEASE NOTE that the edits you make are constricted to the particular report you are working on, and will neither affect other reports nor the Quest itself.

**Answer Alternatives:** Here you have access to input fields for editing the answer alternative texts of the currently selected question. This is useful if you e.g. would like to shorten the texts in order to improve the rendering of the charts.

PLEASE NOTE that the edits you make are constricted to the particular report you are working on, and will neither affect other reports nor the Quest itself.

**Rows/items:** Here you have access to input fields for editing the row or item texts of the currently selected question. This is useful if you e.g. would like to shorten the texts in order to improve the layout and readability of the report, or to improve the rendering of the charts.

PLEASE NOTE that the edits you make are constricted to the particular report you are working on, and will neither affect other reports nor the Quest itself.

**Series:** Here you have input fields for editing the series labels. This is useful if you e.g. would like to shorten the texts in order to improve the layout and readability of the report, or to improve the rendering of the charts.

If you would like to use the same series labels in other questions of a similar type and with a comparison applied, simply click “Apply to other questions” and select the questions you would like to apply the labels to.

**Column labels:** Here you have access to input fields for editing the column labels of currently selected matrix questions.

## Index

### Index contents

**Name:** This is the name the index will be given. The title of the index.

**Select questions:** This is where you select the questions to include in the index. Next to each question, you have access to an input field for modifying the weighting of the question when the index is calculated. By default, all included questions are given a weight of 1.

**Create from an existing index:** If you have created one or more index in a report belonging to the same Quest, you'll have access to this control. If selected, you'll be able to select one of your existing indexes as the point of departure for the index.

### Series

An index can be filtered like a regular question, and it may be compared to other indexes by adding additional series. Please note that indexes cannot be subject to cross tabulations.

### Display settings

Indexes may be displayed with the following chart types:

- Column
- Bar
- Line
- Area

An index is always displayed as an average.

**Show index only:** this will display only the index value in the chart, i.e. the average of the individual questions will be hidden. NOTE: this setting will be enforced when you apply a comparison to an index.



## Label editor

In the label editor, you'll have access to:

**Question text:** This is the title of the index. It will be displayed as the question text for the index question, i.e. on top of the chart.

**Index:** This is the label that will be applied to the index value in the chart, i.e. the label attached to the index chart column.

**Questions:** These are the labels that will be applied to the individual questions making up the index in the chart.

When an index has an active comparison, you'll have access to:

**Question text:** This is the title of the index. It will be displayed as the question text for the index question, i.e. on top of the chart.

**Series:** These are the labels attached to the individual series in the chart.

## Report Settings

Here you have access to the overall report settings.

**Name:** This is where you can edit the report name. Please note that if you are working with a multilingual quest, a language dropdown will be available next to the "Report Name" input field. Please use this to provide the report name in the different languages. If you do not provide the report name in a particular language, it will be displayed in the default language.

**Theme:** This is the theme, i.e. the look and feel of the report.

**LiveReport URL:** This is the URL for accessing the LiveReport. To distribute a public LiveReport, simply copy this URL and paste it into e.g. an e-mail message. To preview the LiveReport from this dialog box, simply click the "Preview" link next to the URL.

**Require Password:** This will protect the LiveReport with a password of your choice. In order to access the LiveReport, the audience would have to know both the URL and the password. To better protect your data, we always recommend that you choose a strong password.

**Let viewer choose filters:** If you select “No, display report as is”, the report will be displayed exactly the way you design it. If you select “Yes, give LiveReport viewer access to selected filters”, you’ll be prompted to select the filters you would like to give the LiveReport viewer access to. The viewer will then be able to apply those filters to any questions in the report. You may give the LiveReport viewer access to any value and/or interval filter.

**Status:** This sets the availability of the LiveReport. (1) “Private” means that the LiveReport only will be visible to logged in users with whom the Quest is shared. (2) “Public” means that the LiveReport is available to anyone in possession of its URL. To restrict a public LiveReport’s audience, simply protect it with a password.

**Display time last updated:** Selecting this will display a timestamp in the LiveReport, showing the viewer when the data was last updated.

**Layout:** This controls the layout of the LiveReport. “One chart per page” is the classic layout where each chart is presented on a separate page. If you would like to present multiple charts on one page, simply select “Single page”, and choose your preferred amount of columns from the dropdown that appears. Please note that the single page LiveReport only displays data and question texts. Content like question comments will be hidden.

## Filters

On this page you have access to all the filters that have been created in the Quest. In addition to filters, you will also see any saved comparison presets here.

At the heart of the page, the filters (and saved comparison presets) are listed in a table with the following columns:

- **Status:** Filters currently in use will be labeled "In use" in this column.
- **Name:** This is the name of the filter (or saved comparison preset).
- **Created by:** This is the name of the user owning the filter (or comparison preset).
- **Type:** This is the type of filter (or comparison preset).
- **Last modified:** This is the date and time of the last modification of the filter (or comparison preset).

To edit an existing filter, simply click the filter name (NOTE: comparison presets are made and edited in the "Series" section of Report Designer).

Depending on the selection made in the table, you have access to the following buttons:

- **New Filter:** This is for creating a new filter. Please see the section "Creating filters" in this user manual for more information on this.
- **Delete:** This is for deleting the selected filters and/or comparison presets.
- **Duplicate:** This is for duplicating the selected filters and/or comparison presets.

## LiveReport

The LiveReport is the newest, most efficient, and best-looking way of sharing your results. By sharing a LiveReport, the viewer will always have access to the latest data. This is especially relevant in running surveys. The live data in the LiveReport looks equally good on mobile devices and desktop computers.

To share a LiveReport, simply make sure it is set to "public", and then distribute the URL to your audience. (See "Report Settings" in this user manual for more details on this.)

If you have given the LiveReport viewer access to a few filters, he/she can apply these using the filter icons that will appear next to the charts. If the report is displayed as a single page report, the LiveReport viewer will also have access to a utility for applying a filter to all the questions in the report where applicable.

## Exporting

To export your report, you can either select it from the report list and click “Export”, or click “Export” from within Report Designer. Upon clicking “Export”, our export wizard will guide you through the process:

1. Select the desired output format. Please note that we offer the following types of output:

- **Summarized reports:** this is a complete report, containing the same data you will see in the LiveReport. Please note that due to the exports being on a different medium and technology than the LiveReports, there will be some visual differences between them. Feel free to style the exported Microsoft Office documents according to your own needs after the fact.
- **Raw data output:** this is your data only. No charts or tables are included. This is the perfect choice if you intend to continue analyzing your findings in a stand-alone tool.
- **Report metadata:** this is a table containing the information found in the reports list, as well as the link to the LiveReports and their password (if any) of the selected report(s).
- **All answer forms:** This contains all the individual answers forms presented in a consecutive view. Please note that only answers displayed in the report will be included, e.g. answers discarded by an applied filter will not be included in this report.

2. According to the chosen format and the contents of the report, you will now have to set the relevant settings. To make it easier for you, we will always hide non-applicable settings.

**Send report as e-mail attachment:** Selecting this option will attach the exported file to an e-mail message and send it to the e-mail address provided in the input field beneath.

**Send report as download link (secure):** Selecting this option will send a secure (https) link to the exported file to the e-mail address provided in the input field beneath. Moreover,

the files generated will be available for you to download from the Reports page. Simply click “View available exported files” above the report list to change the view to exported files and make your selection.

**To:** This is the input field for the recipient e-mail address.

**Include free text input:** Select this option if you would like to include the text input received via the “other” option in questions.

**Display e-mail addresses:** Select this to identify the respondent behind each free text answer (the respondent’s e-mail address will be displayed next to his or her answer).

**Export charts and tables:** Selecting this option will export each question in both chart and table view. NOTE: Open answer questions will always be exported in text view only.

**Export tables only:** Selecting this option will export each question in table view only. NOTE: Open answer questions will always be exported in text view only.

**Export charts only:** Selecting this option will export each question in chart view only. NOTE: Open answer questions will always be exported in text view only.

**Field separator:** This determines the symbol used to separate the fields (columns) in .csv files.

**Data values:** This determines how the data is exported. “Text” means that the chosen answer alternatives are exported as text, i.e. words, whereas “Numeric” means that they are represented by a digit referring to their position in the questionnaire.

**Batch Export:** Select this option if you would like to export different versions of your report, i.e. the same report with different filters or comparisons applied. After you have selected this option, you will see all of your filters and comparisons listed. Select the filters and/or comparisons you would like to apply in a version. PLEASE NOTE that each selected filter or comparison will be exported as a separate version, and that the filters or comparisons applied to a version will overwrite any analyses applied in Report Designer.

**Previous:** Click this to go back to the format selection page.

**Finish:** Click this to initiate the export.

## Follow-up

Follow-up is where you can get back to your respondents, whether it is a single respondent (1-to-1), a few manually selected ones (1-to-many), or the ones selected by one of your filters, e.g. your unhappy customers (1-to-many), or all respondents (1-to-all).

The follow-up page is divided into three sections:

### 1. Responses

Here you have access to a list of all the respondents that have responded to the Quest. To open a particular response, simply click the link in the "Respondent" column. In the column "Cases" you'll see the number of follow-up cases (manual as well as those created by automatic notifications) related to a particular response.

In addition to the list, you have access to the following buttons:

- **Select columns:** Clicking this will trigger a dialog box where you are able to select the content you would like to be included in the table displaying the responses. In addition to the regular system fields like respondent, number of cases etc., you may choose to include answers to questions as well as respondent data of your choice.
- **New case:** Clicking this will open a new follow-up case with the selected respondents. Upon clicking the button, you will have access to a text editor for providing the follow-up message
  - Button "**Send**": if you would like to engage with the respondent in an email dialog, and send the respondent the follow-up message you just inserted, click on the "**Send**" button. The respondent will receive an email with your message, and will have the option to reply to your message by clicking on the follow-up link that is added automatically at the bottom of the email with your message.

- In cases you would like to manually position this follow-up link, simply use the dropdown "Manually position link" in the menu bar when editing your message.
    - In cases you would like to invite the respondent to a follow-up Quest, simply use the dropdown "Insert Quest" to insert an invitation link to one of your Quests\*.
  - Button "**Add Internal Comment**": if you would like your follow-up case with an internal message first, click on "**Add Internal Comment**" instead of "Send". By doing so, you are creating a follow-up case that appears in the "Case" grid below. Continue your follow-up activities in the "Case" grid, e.g. by the case a status or by assigning it to another user.  
Please note: when starting your new case with the button "Add Internal Comment", you do not send any message back to the respondents, and do not engage in an email dialog.
  - Dropdown menu "**Assignee**": Use this to select the user on your account to whom you would like to assign the case.
  - Dropdown menu "**Case status**": If you would like to set a case status to the case, simply select one from this dropdown menu.
- **Save as manual filter**: This will save the current selection as a manual filter.
  - **Export**: This will export the selected rows to an Excel spreadsheet. Please note that only the information included in the table will be exported.
  - **Delete**: This gives you two options:
    - **Delete complete response**: This will delete the entire response.
    - **Delete personal data**: This will delete the personal data only, leaving answers to questions (and respondent data) not tagged as personal data intact.

PLEASE NOTE that the actual deletion of the personal data will be carried out within a minute.

TIP: If a respondent wants his or her personal data deleted, simply use this function in order to safely delete this data.

- **Value filter**: This will filter the list according to the selected value filter.
- **Interval filter**: This will filter the list according to the selected interval filter.

- **Manual filter:** This will filter the list according to the selected manual filter.

\* In order for a Quest to be available as a follow-up Quest, it must fulfill the following criteria: (1) be published, (2) hidden identity must be set to "always", (3) multiple answers from a single respondent must be allowed, and (4) "Distribute by link" must be active.

### **Inside a response**

On the left-hand side of the page, you have access to the answers and respondent data constituting the response. You may move between the individual responses using the "Next response" and "Previous response" buttons on the top of the left-hand side of the page.

To add a comment to the open response, simply use the input field under the "Comment" section. These comments are visible to the other users with access to the quest, but not to the respondent.

On the right-hand side of the page you will either have access to an input field for creating a case by sending a follow up message to the respondent responsible for the response, or – if one or more cases have been created from this response – a list of existing follow-up cases for this response. In order to view or continue a follow-up dialog, simply click the case subject in the list.

You may delete the response using the available "Delete" button (you will be presented with the same options as when deleting from the table, see above section for more details), or use the edit button to edit the response. When editing the answers, you will be presented with the Quest with the respondent's submitted answers already filled in. Simply go through the Quest, changing the answers, and click "send" in order to update the response. When updating the custom fields, simply make your changes in the dialog box that appears.

When you open a follow-up case in the right-hand editor, you will get access to the following buttons:



- **Set Case Status:** This is for giving the case a status. This function is optional, and is designed to help you keep track of a large number of follow-up cases.
- **Assign to User:** This is for assigning the follow-up case to another user on your account.
- **Add Internal Comment:** This is for adding an internal comment to the follow-up dialog. The internal comments will not be visible to the respondent.

In addition to the buttons, you have access to a control for changing the subject of the follow-up case. The subject is used as the subject in the follow-up e-mails being sent to the respondent.

## 2. Cases

Here you have access to a list of all the follow-up cases created. The list contains the following information:

- **Flag:** This is for highlighting particular follow-up cases.
- **Read status:** This will display an icon if you have an unread message or if the last message was an outgoing message.
- **Case subject:** This is the subject of the follow-up case. To open one of the follow-up case, simply click its name.
- **Respondent:** This is the respondent connected to the follow-up case.
- **Messages:** This will display the number of messages in the follow-up case.
- **Case status:** If you have set the case status for a case, it will be displayed here.
- **Assignee:** This displays the user assigned to a particular follow-up case.
- **Last action:** This displays the time and date of the last action in the follow-up case.

For information about the buttons "Set Case Status", "Assign to User", and "Add Internal Comment", please see the section "Inside a response" above.

- **Quick filter:** This will let you quickly narrow down the list according to the following criteria:
  - Open cases: only display cases with status set to "open".
  - My open cases: only display cases assigned to you and with the status set to "open".
  - My cases: only display cases assigned to you.
- **Value filter:** This will filter the list according to the selected value filter.
- **Interval filter:** This will filter the list according to the selected interval filter.
- **Manual filter:** This will filter the list according to the selected manual filter.

### **3. Cases log**

This section displays the number of read and unread messages, as well as the number of messages belonging to the various case statuses.

## NPS™ Module

The NPS™ module consists of a new question type, an NPS™ report designer, as well as a set of filters and routing/notification criteria.

## NPS™ Question

The NPS™ question is a 0-10 scale-based single select question, with a specific question text: How likely is it that you would recommend (your company/brand) to a friend or colleague? To make it easy for you to ask the correct question, we have filled in your account name in the question text. If your company or brand is different from your account name, feel free to modify the proposed question text. PLEASE NOTE: You should only modify the company/brand name. If you modify other parts of the proposed question text, the NPS™ data you collect cannot be considered accurate.

When you add an NPS™ question to a Quest, you have to provide some extra information:

## NPS™ Target

The NPS™ target is the NPS™ score you are aiming for, and will show up in your NPS™ charts. When setting the NPS™ target, we recommend that you do some research to find out what is considered a good NPS™ score in your industry.

## NPS™ Classification

When you add an NPS™ question to a Quest, a new section called “NPS™ Classification” will appear in the Quest Settings:

- **Industry:** This is the industry to which the company/brand you are getting the NPS™ score for belongs. Please select one of the industries from the dropdown menu. Please note that this is a mandatory field.
- **Target Group:** This is the Quest’s target group. Are you primarily going to invite “internal” respondents, e.g. your own employees, or “external” respondents, e.g. your customers? Please note that this is a mandatory field.

- **Survey Type:** This contains a list of traditional survey types where the use of NPS™ is popular. Please note that this is an optional field.

## **Routing and Notification Criteria**

When you add an NPS™ question to a Quest or translate an existing question to an NPS™ question, we give you access to a special routing and notification criterion. This criterion makes it easy to e.g. route detractors and promoters to different questions in a Quest, or send out a notification to e.g. the HR manager each time an employee is categorized as a detractor.

### **Routing Criterion**

In contrast to regular questions, you do not have to select individual answer alternatives to set up a routing criterion. With NPS™ questions, we give you the NPS™ categories “detractors”, “passives”, and “promoters” within the routing section, making it a breeze to route e.g. promoters to an open answer question asking why they are likely to recommend your company to a friend or colleague.

### **Notification Criterion**

In contrast to regular questions, you do not have to select individual answer alternatives to set up a notification criterion. With NPS™ questions, we give you the NPS™ categories “detractors”, “passives”, and “promoters” within the notification section, making it a breeze to notify e.g. a key account manager each time a customer turns out to be a detractor.

## **Automatically Generated Filters**

When you add an NPS™ question to a Quest, we automatically generate a set of filters for you to use in e.g. the Feedback module or Report Designer. The filters can be found in the “Value Filter” dropdown in Report Designer and the Feedback module, and they are

named “Detractors”, “Passives”, and “Promoters”, to make it easy to narrow your results down to any of these groups.

## List of NPS™ Reports

When you click the “NPS™” tab, you are taken to the list of NPS™ reports. Here you will have access to your own NPS™ reports as well as NPS™ reports shared by other users on your account. The action buttons are the same as the ones you are familiar with from Report Designer, with the exception of the “Translate to NPS™” button, used for translating other compatible scale-based questions to NPS™ questions (see “Translating Other Scale-based Questions to NPS™” below for more info on this). As in the regular report list, you can sort by different columns, search for reports, and click a report to open it. Most of the available columns are the same as in the regular report list, with a couple of exceptions.

To the left of the “status” column, there is an information column. If you see a symbol in this column, simply hover above it with your mouse pointer to receive the information as a tooltip.

To the right of the “status” column, there is a column used to warn you of a low NPS™ score. If you see a light red circle, the aggregate NPS™ score in the report is significantly lower than its target. If you see a dark red circle, the aggregate NPS™ score in the report is below 0.

The column named “NPS™” is used to give you a quick overview of the aggregate NPS™ score in the report. In this column you’ll see the NPS™ score as a number between -100 and 100, the NPS™ score in relation to the target as a bullet graph, as well as the NPS™ trend as a sparkline.

## NPS™ Report Designer

The NPS™ Report Designer is the heart of the NPS™ module, and it is a powerful tool for calculating and analyzing your NPS™ score.

To get started, you would need access to at least one Quest with an NPS™ question. The real strength of the NPS™ Report Designer, however, comes into play when you have access to several Quests with NPS™ questions. To set up your first NPS™ report, simply navigate to the NPS™ tab, click “New Report”, and work your way through the dialog box that appears.

## Creating a New NPS™ Report

- **Report Name:** This is the name of the NPS™ report.
- **Source:** This is the Quests you would like to make available to the NPS™ report you are creating. Only data from Quests added as sources can be displayed in the NPS™ report.
  - **Quest:** This is where you select the Quest you would like to make available to the report.
  - **Add Source:** To make another Quest available to the NPS™ report, simply click this button and select the Quest in the “Quest” dropdown that appears. To remove an added source, simply click the red cross to the right of its NPS™ target.
  - **NPS™ Target:** This is the NPS™ score you are aiming for, or would consider a decent NPS™ score.
- **Sharing Permissions:** The NPS™ report is not tied to a specific Quest, and is therefore not automatically shared with the same set of users as the included Quest(s). To share the NPS™ report with other users, please use the checkboxes provided in this section. “Share with all users” will share the report with all the other users on your account. If you would rather share the report with individual users on the account, please check the checkboxes next to the users you would like to share the report with. When you select a user, you will get the option to either share the report as “read only”, or to give the user both read and write access, i.e. the rights to edit the report.

## Inside the NPS™ Report

The NPS™ Report Designer is divided into two main sections:

## 1. The Action Buttons

- **Save:** This will save the open NPS™ report.
- **Save As:** This will let you save the open NPS™ report under a new name.
- **Cancel:** If your report has unsaved changes, you can click this to revert back to the previous saved state.
- **Report Settings:** This opens the report settings dialog (see “Report Settings” below for more details).
- **Print:** This will print the open NPS™ report. Please refer to your printer driver manual for more information on various print settings.
- **Export:** This will open the export wizard, guiding you through the process of exporting the open NPS™ report.
- **Preview:** This will open the report in the LiveReport.

## 2. The Main Working Area

This is where you determine the contents and layout of your NPS™ report. Just like in Report Designer, the main working area is divided into several sections:

### Series

Here you can add, modify, and sort the series:

- **Source:** This is where you select the Quest from which to pull this series' NPS™ score. Please note that only Quests added as a source in either the “Report Settings” or “New Report” dialog will show up in this dropdown.
- **Value Filter:** This is for applying a value filter to this series. Please note that only value filters from the source Quest will show up in the dropdown. To create a new value filter, simply click the green plus icon next to the dropdown.
- **Interval Filter:** This is for applying an interval filter to this series. Please note that only interval filters from the source Quest will show up in the dropdown. To create a new interval filter, simply click the green plus icon next to the dropdown.
- **Series Name:** Here you can provide a name for the series.
- **The color picker dropdown:** This is where you set the color for this series. The selected color will be applied to this series in the timeline as well as to its NPS™ charts.
- **Add Series:** This will add another series to the report.

TIP! If you have multiple series, you can use the green up and down arrows to re-order the series.

### Display Settings

**Timeline Chart Type:** This will change the chart type of the timeline chart.

**Aggregate Chart Color:** If you have added more than a single series, you will always see an aggregate NPS™ score in addition to your added series. Please use this color picker to set the color of the aggregate charts.

### Display

Just like in Report Designer, this is where you can view your data and add comments.

**Show Comments:** Use this to add comments to your report. If you would like to add more than a single comment, simply click the green plus icon in the comment section. To remove a comment, simply click the red cross in the comment section. If you only have a single comment, simply uncheck the “Show Comments” checkbox to remove the comment.

TIP! It’s possible to re-order comments by dragging and dropping them into the desired position. It’s also possible to drag and drop comments between the different chart sections, e.g. between the NPS™ charts and the timeline.

**Show NPS™:** This determines the visibility of the NPS™ charts. The NPS™ charts consists of the following: (1) the NPS™ score as a number between -100 and 100, (2) the NPS™ score in a bullet graph with the NPS™ target marked as a dotted red line, and (3) a stacked bar chart displaying the ratio between detractors, passives, and promoters.

**Show Timeline:** This displays how your NPS™ score has evolved over time.

**Show Table:** This gives you a tabular view of your NPS™ data.

### Report Settings

This is where you have access to the same settings as in the new NPS™ report wizard.



- **Report Name:** This is the name of the NPS™ report.
- **Source:** This is the Quests you would like to make available to the NPS™ report. Only data from Quests added as sources can be displayed in the NPS™ report.
  - **Quest:** This is where you select the Quest you would like to make available to the report.
  - **Add Source:** To make another Quest available to the NPS™ report, simply click this button and select the Quest in the “Quest” dropdown that appears. To remove an added source, simply click the red cross to the right of its NPS™ target.
  - **NPS™ Target:** This is the NPS™ score you are aiming for, or would consider a decent NPS™ score.
- **Sharing Permissions:** The NPS™ report is not tied to a specific Quest, and is therefore not automatically shared with the same set of users as the included Quest(s). To share the NPS™ report with other users, please use the checkboxes provided in this section. “Share with all users” will share the report with all the other users on your account. If you would rather share the report with individual users on the account, please check the checkboxes next to the users you would like to share the report with. When you select a user, you will get the option to either share the report as “read only”, or to give the user both read and write access, i.e. the rights to edit the report.

## Translating Other Scale-based Questions to NPS™

If you’ve previously asked the “NPS™ question”, i.e. “How likely is it that you would recommend this or that to a friend or colleague?”, but made use of a different scale, e.g. a 1-5 or 1-6 scale, you can use this function to translate your question into an NPS™ question. To translate a question to NPS™ simply click “Translate to NPS™” and follow the on-screen instructions.

**Quest:** This is where you select the Quest containing the question you would like to translate. Please note that only Quests containing single select questions will show up in the dropdown.

**Question:** This is where you select the question you would like to translate. Please note that only questions deemed to be scale-based single select questions will show up in the list.

**NPS™ Target:** This is the target for the translated question.

Just like when setting up a native NPS™ question, you have to provide some NPS™ classification information. Please see the “NPS™ Question” section in this manual for more information about this.

If we manage to translate the selected question to an NPS™ question, it will behave just like a native NPS™ question. Please note that we are only translating, not converting the question. This means that the original question will remain the same.

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# Theme Manager

With **Theme Manager** users can create their own custom **Quest, email** and **report themes**. They can also select which ones are available in the account. Themes can be created from scratch or any theme (also built-in Essentials system themes) can be used as a starting point.

Theme Manager can be accessed from the side menu. The link is visible for all users and all users can access the page and create themes. However, some functionality is only available for super users and the responsible user.

## Columns

- **Type:** Usage area for the theme: *Quest, Email* or *Report*
- **Name:** Name of the theme. Clicking on name opens the theme in theme editor.
- **Editable:** Yes or No. System themes cannot be edited and themes shared by other users cannot be edited by Designer user. See more for permissions on the related chapter below.
- **Origin:** Themes created by users are of type *User* and built-in Essentials themes are *System*. Themes shared from another account are *External*. System and External themes can only be set up by Questback, not by users.
- **Status:** *Shared* or *Private* depending if theme is made available for all users
- **Created by:** Name of user who created the theme. System themes have name *Questback*. Custom themes created by Questback before Theme Manager have responsible user's name.
- **Last modified:** Date and time when theme was last modified.
- **Actions:** Icons for Share, Make private and Delete. These work the same as buttons above grid.

The search function on the Theme Manager page searches through the following categories:

- Name
- Created by

## New theme

**New theme** button opens the theme editor – see Theme Editor chapter below.

Button is a split button that allows selecting theme type of new theme: Quest, Email or Report.

## Duplicate

**Duplicate** button creates a copy of existing theme. Only one theme can be duplicated at a time. If more than one theme is selected in the grid, then Duplicate button is disabled.

Creating a duplicate creates a new theme with name *<themename>(n)* same way as quest duplication works. The duplicated theme has same settings as the original one.

System themes cannot be edited but they can be duplicated and the duplicate freely edited.

## Delete

**Delete** button deletes an existing theme. One or more themes need to be selected for the button to be enabled. One or more can be deleted at the same time. Selecting a system theme will disable the Delete button because they cannot be deleted.

Deleting a theme will:

- Remove it from the Theme Manager grid
- Remove it from Quest settings and Report settings theme drop downs, i.e. theme cannot be selected anymore

Remove it from any quest using it so respondents and Livereport viewers cannot see the theme anymore. Those quests revert to Essentials Standard system theme.

## Make default

When a theme is made default theme, the theme appears as default selection on theme drop downs in Quest settings or Report settings. This way it's easy to have a same theme on all new Quests since there is no need to select that theme separately. Default themes can be selected for all three areas: Quest, email and report. So **total of three default themes is possible**.

Only one theme can be selected and made default at same time. If more than one theme is selected, then the button is disabled.

All users can set any theme as **default theme for themselves**. The responsible user can set any theme as account-wide **default theme for all users**. Users may override this with their own default theme.

## Share and Make Private

Share button makes the selected themes available in theme drop downs in Quest settings or Report settings **for all users**. Make Private button is opposite of this and makes a shared theme **back to private**.

One or more themes need to be selected for the buttons to be enabled. One or more can be shared or made private at same time. Selecting a system theme will disable the buttons because they cannot be shared or made private – except by the responsible user who is the only one who can do this to system themes. This means the responsible user can control which system themes are hidden in the account from all users by making them private.

## Theme Editor

Creating a new theme or editing an existing theme opens a new page – the **Theme Editor**. Settings on this page for theme layout are used to generate the actual theme CSS which is used in quests, emails and reports.

Page is divided in to two parts:

- left side: all the settings

- right side: preview area – a static html page with preview of Quest, email or report.

Any changes to are immediately reflected in the preview area.

Newly created themes are not shared by default. New theme starts with settings from Essentials Standard system theme.

**PLEASE NOTE:** When an existing theme is edited the changes done are immediately reflected in any Quests or reports using the theme. Emails waiting to be sent are also affected. Emails already sent are obviously not affected by theme changes.

Depending on the theme type, you'll have access to the following controls in Theme Editor:

## Quest theme

### Name

Name of the theme. Must not be left empty.

### Logo

Logo can be selected for a theme. Logo image is selected with media picker from Media Manager. Preview image is displayed if logo is selected.

Logo alignment and pages can be selected. These are same selection as in Quest settings.

**PLEASE NOTE:** Logo settings in Theme Editor can be overridden with similar existing options in Quest settings.

Name  
New quest theme 2304

▼ **LOGO**

Image

Alignment  Left  Centre  Right

Show Logo on: All pages

▼ **BACKGROUND**

Color

Image

Alignment Left Top

Repeat No repeat

Auto-fit

▼ **TEXT**

Base font Verdana 14px

Title Verdana 240%

Questions Verdana 100%

Button Verdana 120%

▼ **OTHER**

Quest area background

Dividing line color

Progress bar color

Progress bar background

Button color

Display Quest name

Display progress bar

▼ **CUSTOM CSS**

Themes can be styled even further with custom CSS. [Click to learn more..](#)

1  
2  
3  
4  
5  
6  
7  
8  
9  
10

**Background**

Either background color or image can be selected. Color is selected by default.

**Color**

Color picker is available to select single color for background.

**Image**

An image can be selected from Media Manager and used as a background image. Preview image is displayed if an image is selected.

**Alignment:**

- horizontally - values in drop down:  
Left, Center, Right
- vertically - values in drop down:  
Top, Middle, Bottom

**Repeat**

Image can be repeated as a pattern. Values in drop down are: Yes, Horizontally, Vertically, No. Default is No.

Auto-fit option fills the background with image so that it fills the whole browser window. Background also stays in place when content is scrolled.

## Text

Font, text size, text color, bold or italic can be selected for different areas of text in the theme.

## Other

Miscellaneous theme related options can be found here:

- **Quest area background:** Color for background behind quest content.
- **Quest area shadow color:** Shadow color around content area.
- **Display quest area shadow:** Toggles shadow on and off
- **Dividing line color:** Color for optional dividers between questions.  
**Progress bar color:** The progressed part of the bar.
- **Progress bar background:** Bar background color.
- **Button color:** Color for Next/Send and Back buttons.
- **Display Quest name:** Toggles title on and off on all pages.
- **Display progress bar:** Toggles progress bar on and off on all pages.

## Custom CSS

Custom CSS allows users to specify theme layout in more detailed way than what is provided by the Theme Manager settings. Whatever is specified in custom CSS text area can be used to override or enhance what has been set above with settings.

**Custom CSS is meant for expert users with knowledge of HTML and CSS languages.**

Simple documentation of answer module CSS classes is provided behind the link above the text area. Users can also find out the required CSS classes by inspecting preview area HTML with Chrome Developer Tools or similar tools.

PLEASE NOTE: Generation 2 themes only display theme CSS here. No other options are available for those.

## Quest theme generations

Quest themes can be divided into three generations depending on when they were created and what kind technical differences they have.



### **Generation 1 - Pre v13.2 ( -2014) - File-based themes**

Oldest themes are always file based. These cannot be edited with theme editor, but can be deleted by the responsible user. Cannot be duplicated.

### **Generation 2 - Post v13.2 (2014-2016) - Mother-theme based**

Themes based on mother theme can be edited only with the custom CSS field. These are typically custom themes ordered in the period 2014-2016. Can be deleted by the responsible user. Cannot be duplicated.

### **Generation 3 - Post v21 (2016- ) - Parametrized themes**

These are the new themes created with the theme editor. They can be edited, deleted, duplicated etc. as described here.

Email and report themes are always Generation 3.

## **Email theme**

Email themes have less options to choose from due to the more limited nature of HTML emails.

Different email clients interpret emails differently. This means careful styling done for an email might work fine in e.g. Gmail, but not with Outlook. Quest and Report theming is easier because modern browsers usually display all content in same way.

Previewing an email theme is done with preview area on right, and also optionally by sending an email with the **Send test** functionality. Email field is by default populated with user's email address but can be changed to any email address.

PLEASE NOTE: Previewing email themes by sending them to yourself is **highly recommended**. Email can then be viewed with actual desktop and mobile devices if possible.

## Report theme

Report theme settings are almost the same as with Quest theme – with some variations, such as controls for report menu items and sections which can only be found in reports.

A drop down can be used to toggle between preview of single page and multiple page report.

**Note:** Only LiveReports are affected by a report theme – **not any exported files.**

## Permissions per user type

Below is description of how theming is reflected on different user types.

### All users

- can create a theme and share it with all users
- can edit and delete their own themes
- created private themes remain private from all other users
- can make any theme as default theme for themselves
- can use any theme they see in Theme Manager on Quests, emails or reports
- cannot edit themes shared by other users, but can duplicate them and edit the duplicates

### Super users

All of the above plus:

- cannot see any private themes in Theme Manager grid
- can edit anyone's shared themes
  - o Generation 1 themes: Name can be edited only
  - o Generation 2 themes: Name and Custom CSS can be edited
  - o Generation 3 themes: Everything can be edited

### Responsible user

All of the above plus:

- cannot see users' private themes in Theme manager grid, but can see private System themes

- can change sharing of System themes to control their visibility for all users
- can delete old custom themes - even old file-based themes
- can set any theme as account-wide default theme for all users

## Examples of usage

### How to create a custom theme

- Go to Theme Manager
- Click the button New Theme and select theme type
- Select the settings for your theme such as colors, fonts, logo, etc.
- Save the theme by clicking Ok
- Optionally theme can be shared with all users

### How to select which themes are visible in an account

- All users and super users:
  - o Create your own theme and share it with all users
  - o Or make your shared themes back to private
  - o Or delete your themes
- Responsible user:
  - o As above, but can also toggle sharing of any System themes, i.e. hide them from users

### How to make sure same company theme is selected by default for all users

- Create a theme with company branding
- Share it with all users
- Set it as account-wide default theme for all users (*only responsible user can do this*)

**Note:** Users can still create their own themes and override the default theme with their own theme.

## GDPR Statement Manager

Like all managers in ESS, the user will have access to their own GDPR statements as well as the statements other users in the account have shared. Shared statements will be shared

with all users on the account. Users can use and edit other users' shared statements, but only delete or un-share their own.

Each statement is mono-lingual, so translations are carried out by creating multiple versions of the same statement, each in their own language.

When creating and/or editing a statement, the controller has access to the same fields as described in "Quest settings" above, with the exception of retention period, which is treated as a quest-specific setting. In addition, he/she will have to tag the GDPR statement with a language using the language control.

## Condition builder

The condition builder is available from everywhere you may use conditions (routing, notifications, and filters). It supports the building of complex conditions using nested levels (groups).

On each level, you can select between an "AND" logic (i.e. that all of the conditions must be met) and an "OR" logic (i.e. that at least one of the conditions must be met). Each level is visualized with a line from the logic selector switch so it's easy to see how the condition is constructed.

Depending on the content on which you base the condition, you can set the logic/operand for each individual condition:

### Single select questions

- Any of (i.e. any of the alternatives you check off in the dialog)
- None of (i.e. none of the alternatives you check off in the dialog)
- Answered (i.e. that the question has been answered)
- Not answered (i.e. that the question has been left unanswered)

### Multi select questions

- Any of (i.e. any of the alternatives you check off in the dialog)
- All of (i.e. all of the alternatives you check off in the dialog)
- None of (i.e. none of the alternatives you check off in the dialog)

- Answered (i.e. that the question has been answered)
- Not answered (i.e. that the question has been left unanswered)

#### **Score obtained (for quests with scoring)**

- Is equal to (i.e. the score has to be exactly equal to the score you provide in the input field in the dialog)
- Is equal to or higher than (i.e. the score has to be equal to or higher than the score you provide in the input field in the dialog)
- Is equal to or lower than (i.e. the score has to be equal to or lower than the score you provide in the input field in the dialog)
- Is between (i.e. the score has to be between the values you provide in the two input fields in the dialog).

#### **Open answer questions**

- Contains (i.e. that the text you provide in the input field in the dialog is found somewhere in the answer, regardless of the order of the words)
- Does not contain (i.e. that the text you provide in the input field in the dialog is nowhere to be found in the answer)
- Is equal to (i.e. that the exact string you provide in the input field in the dialog is found in the answer. The difference between this and “contains”, is that this takes the order of the words into account)
- Answered (i.e. that the question has been answered)
- Not answered (i.e. that the question has been left unanswered)

## Question and Answer Tags

This functionality is one of the steps on the way to provide workflow/process type processes to be set up with Essentials. This usually involves the capability for creating actions or dynamic content based on the responses to by the respondents.

## Redirect URL

This means that at the finish of the quest you can forward the respondent to a specified URL, where you can use answers as parameters of the query string. This allows Essentials users to tie some more sophisticated processes to the surveys.

Sample redirect URL:

```
https://www.mysamplesite.com/surveycompetition?customerdetail=[question id="12345" output="[answer]" encoding="url"]
```

When the redirect occurs when the respondent finishes responding, the tag will be replaced with the answer to the specified question thus in reality redirecting the user to the following URL:

```
https://www.mysamplesite.com/surveycompetition?customerdetail=answerdetail
```

## Tag Specification

The question tag has the following attributes:

Attribute name	Attribute value(s)	Description	Mandatory	Default
id	Integer	The unique number identifying a specific question.	Yes	-
output	[answer]  [question]	Output is defined by attribute, which can contain one or more of two tags.  [answer] is replaced by the corresponding answer.  [question] is replaced by the corresponding question text.	Yes	-
type	value  text	This applies when [answer] appears in the output attribute.  When value is chosen, the order value of answer alternative is used when replacing [answer].  When text is chosen, the text label of answer alternative is used when replacing [answer]	No	text
encoding	utf8  url  html	Specifies the encoding of the output.  Formats the output string as utf8 encoded ANSI string  Encodes the output string with URL encoding ( <a href="https://en.wikipedia.org/wiki/Percent-encoding">https://en.wikipedia.org/wiki/Percent-encoding</a> )  Encodes the output string with HTML encoding ( <a href="https://en.wikipedia.org/wiki/Character_encodings_in_HTML">https://en.wikipedia.org/wiki/Character_encodings in HTML</a> )	No	Unicode

## Samples

Below we list some sample usages that correspond to specific functionality:

## URL Redirects

Tag	Result
[question id="1234" output="[question]" encoding="url"]	The%20Question%20Name
[question id="1234" output="[answer]" encoding="url"] <i>1234 refers to a question type having alternatives</i>	Alternative%20X
[question id="1234" output="[answer]" type="value" encoding="url"] <i>1234 refers to a question type having alternatives</i>	1
[question id="1234" output="[answer]" encoding="url"] <i>1234 refers to a question type that is open answer</i>	My%20comments
[question id="1234" output="[question]" encoding="url"]	Question%20title

## Extra Samples

Tag	Result
[question id="1234" output="You answered [answer] on the question [question]"]	You answered Yes on the question Do you like Q&A tags
[question id="1234" output="You answered [answer] on the question [question]" encoding="url"]	You%20answered%20Yes%20on%20the%20question%20Do%20you%20like%20Q%26A%20tags
[question id="1234" output="You answered [answer] on the question [question]" encoding="html"]	You answered Yes on the question Do you like Q&A tags

## Notes

Type attribute is only applicable for output of [answer] at the moment. Output of [question] is always type text.



If question is of type multiple, then the result with [answer] in output attribute will result in comma separated list.

For example:

Alternative 1, Alternative 2, Alternative 3

Or

1, 2, 3

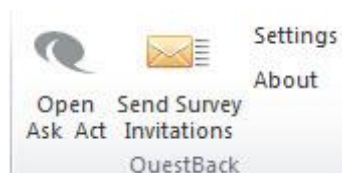
## Add-ons

### Questback Outlook Connector

The Outlook Connector is a plug-in for the Windows version of Microsoft Outlook that enables you to send survey invitations to your Outlook contacts.

To get started using the Outlook Connector, you first have to download and install the plug-in. When logged in to Questback Essentials, simply head over to the “Resource Center”, and click “Add-ons”. From there, you will have access to the installer files.

Upon installing the Outlook Connector, you will find a new set of controls on the “Home” ribbon in Microsoft Outlook:



## **Settings**

### **Log in**

In order to connect the Questback Outlook Connector to your Questback account, you first have to provide your login credentials. When you have provided your Questback Essentials username and password, simply click “Log in”. When successfully logged in, you can start inviting your Outlook contacts (see “Send Survey Invitations” below for details on how to send survey invitations to your Outlook contacts).

### **Questback Connector Preference**

Here you have access to a control for setting the interface language of the Questback Outlook Connector. We currently support English and Norwegian.

## **Send Survey Invitations**

This activates a wizard designed to guide you through the process of inviting Outlook contacts to a survey of your choice (NOTE: the survey must be published and it has to reside in a folder to which you have access in order to be available to the Outlook Connector).

### **Select Survey**

Here you can select the survey you would like to invite people to. After having located the folder containing the survey using the “Folder” dropdown, simply select the correct survey in the “Survey” dropdown and click “Next”.

### **Select Names**

This is the native Microsoft Outlook interface for adding recipients. Simply select your desired address book from the dropdown and start adding recipients. When you have added the contacts you would like to invite to the survey, simply click “OK” to add the selected contacts as invitees.

## **Invitation Message**

Here you are presented with a preview of the invitation message. Please note that you are not able to edit the message from Questback Outlook Connector. The invitation message will always be the one provided on the “Distribution” page in the Questback Essentials service.

If the selected survey is multilingual, please make sure to select the desired invitation language from the “Language” dropdown before you click “Next”. PLEASE NOTE: The invitation will be sent in the language selected in the “Language” dropdown.

## **Review Contacts**

Here you are presented with a list of the contacts you are about to invite to the survey. If you would like to make changes to the list, simply click “Back” to clear the list and re-trigger the “Select Names” dialog. If you are satisfied with your selection, simply click “Next”.

## **Send Invitations**

Here you are presented with a short summary to help you make sure you are inviting the contacts to the correct survey. If everything looks OK, simply click “Send” to send the invitations. The contacts are now added to the list of respondents in Questback Essentials’s Respondent Manager.

## **Open Questback Essentials**

Clicking this will open Questback Essentials in your default browser.

## **Uninstalling Questback Outlook Connector**

To uninstall Questback Outlook Connector, simply open the “Control Panel” (can be located in your PC’s “Start” menu) and click “Uninstall a program”. Select “Questback Connector” from the list of installed programs, and click “Uninstall”. When finished

uninstalling, you may have to restart Microsoft Outlook in order to remove the Questback Outlook Connector buttons from the ribbon.

## **Need more help?**

If you need to contact Questback support, please use the support form directly in Questback Essentials under “MENU/Support”, or contact your local Questback office.

If you have any suggestions on how to improve Questback, please submit your suggestion directly in Questback Essentials under “MENU/Suggestions”, or contact your local Questback office.

If you are interested in video tutorials for self-learning, please check our extended library directly in Questback Essentials under “MENU/Tutorials”.

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