

# SmartSurvey Tool Box

Brought to you by the Federation working with the Gatsby Foundation

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## **Introduction**

Throughout the development of an Apprenticeship standard there are many opportunities to gather industry feedback through the use of online surveys. To help with this process, the Federation has developed a number of survey templates to support different stages of development of a standard. These survey templates can be used as they are or can be adapted to your specific needs.

We recommend that you read every question within the surveys to make sure that each is applicable to your survey requirements. Within the survey templates, you can edit, add or remove the existing questions. There are notes [in squared brackets] that indicate where you might want to provide additional information and where you will need to add specific details into the question. The templates indicate questions that must be answered by the respondent. However, whether you require these questions to be answered is your decision and you can remove the 'required' option or add it to other questions.

Throughout the guide there are screenshots of the images that you will see. Where there is specific reference to a section of the screen shot throughout the text a red box will highlight the area that this will appear on the screen. If there are multiple boxes used to highlight areas then the box will be identified with a corresponding number within the text.

If you have any problems using the site then the Federation can offer some support along with Smart Survey themselves. The contact details for both are at the end of the guide.

## Start

You will need to contact the Federation for an account that you can use for the duration of your surveys. If you would like to use the surveys set up by the Federation please contact [ruth.davies@fiss.org](mailto:ruth.davies@fiss.org).



Once you have received your log in details you will need to go to the SmartSurvey home page to log in <http://www.smartsurvey.co.uk/> and select the option to log in

## Dashboard

The Federation have developed this survey tool for you using a SmartSurvey platform which is generic across SmartSurvey. When you are logged in you will be taken to SmartSurvey dashboard which allows you to access your surveys, access your resources and help documents. There are several options on the dashboard of which come under 3 headings: General, Resources and Support, though you will mainly use the General and Support areas.

### General (1)

Under general you will find the option to go to 'my surveys' which is where you will find all your existing surveys. Including the template ones the Federation have developed. You will also see create a survey, this is the option to develop a survey either by copying an existing survey or start a new one.

### Support (2)

This is the area where you can get direct help from SmartSurvey through using their ticket system or looking at the help documents that they have provided. If there is a particular issue that you are having with using the system then you can select the option new ticket. Once you have sent your issue you can view the ticket selecting the view tickets button.

All help documents that have been provided by SmartSurvey can be found when you select the help documents button. This will open in a new tab and you have the option to search for help with a particular topic or look through the lists that they have provided.

SmartSurvey™ Dashboard My Surveys Resources Support Logout

Account Number s53265 | You have a CORPORATE USER account | If you need any help, please create a [support ticket!](#)

Dashboard [Create New Survey](#)

**General** 1

My Surveys Create a Survey

Resources

Address Book Themes File Cabinet

Downloads Question Library

**Support** 2

View Tickets New Ticket Help Documents

Latest Updates

My Account CORP

User: [REDACTED] Account Number: s53265

Account E-mail: [REDACTED]

Monthly Responses

Remaining	5,000	Total Limit	5,000
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Within the dashboard you will be able to manage all of your surveys. The Federation have drafted some template surveys for you to use at the different stages of standard development. To view these you will need to select the option 'My Surveys'

The screenshot shows the SmartSurvey dashboard interface. At the top, there is a navigation bar with the SmartSurvey logo and menu items: Dashboard, My Surveys, Resources, Support, and Logout. Below the navigation bar, the dashboard is divided into several sections. The 'General' section contains a 'My Surveys' button, which is highlighted with a red rectangle, and a 'Create a Survey' button. The 'Resources' section includes buttons for Address Book, Themes, File Cabinet, Downloads, and Question Library. The 'Support' section includes buttons for View Tickets, New Ticket, Help Documents, and Latest Updates. On the right side of the dashboard, there is a 'My Account' widget for a corporate user. It displays the user's account number (s53265), account email, and monthly response limits. The 'Monthly Responses' section shows 5,000 remaining responses out of a total limit of 5,000.

Account Number	Account E-mail	Monthly Responses Remaining	Monthly Responses Total Limit
s53265	[Redacted]	5,000	5,000

## My Surveys

Within the 'my surveys' tab you will see a list of all of the surveys that you have access to, these include the 4 that the Federation have drafted:

### Questions for all consultations

This is the set of questions that should be included within all surveys that are carried out and contain generic background questions for the respondent to complete.

### Pre Expression of Interest

The questions included within this survey template are primarily to establish and explore demand for the proposed standard.

### Draft Standard Consultation and high level assessment

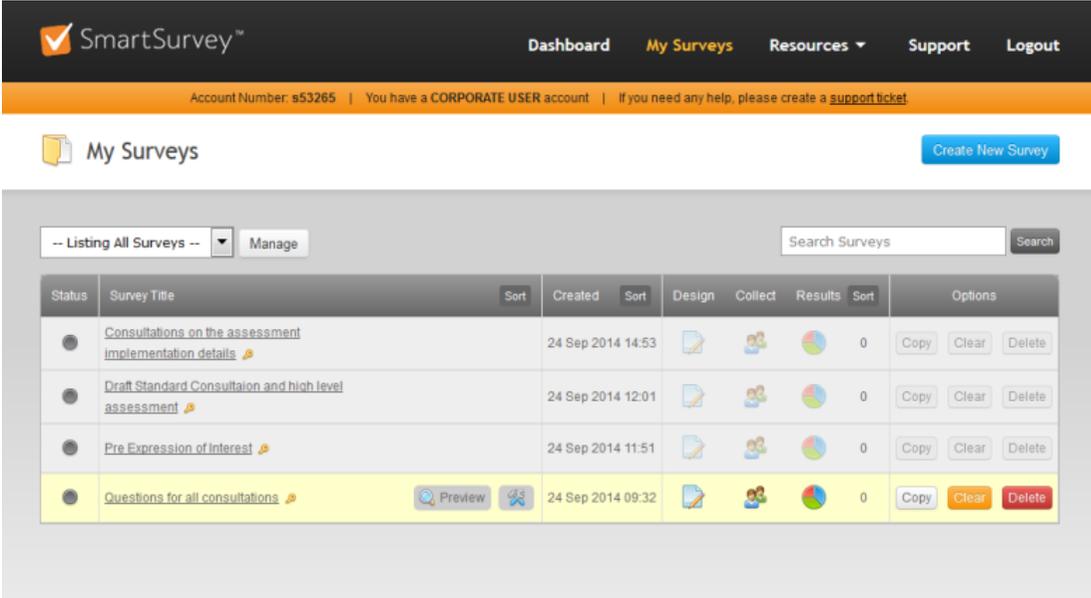
This survey contains the questions that you may wish to ask during the standard development phase. There may be multiple stages throughout the standard development process in which you may be wanting to carryout a survey and so you will need to ensure the question wording reflects this.

### Conulstation on the assessment implementation details

This survey contains the questions that you may wish to ask during the assessment implementation phase.

## Copying a Template

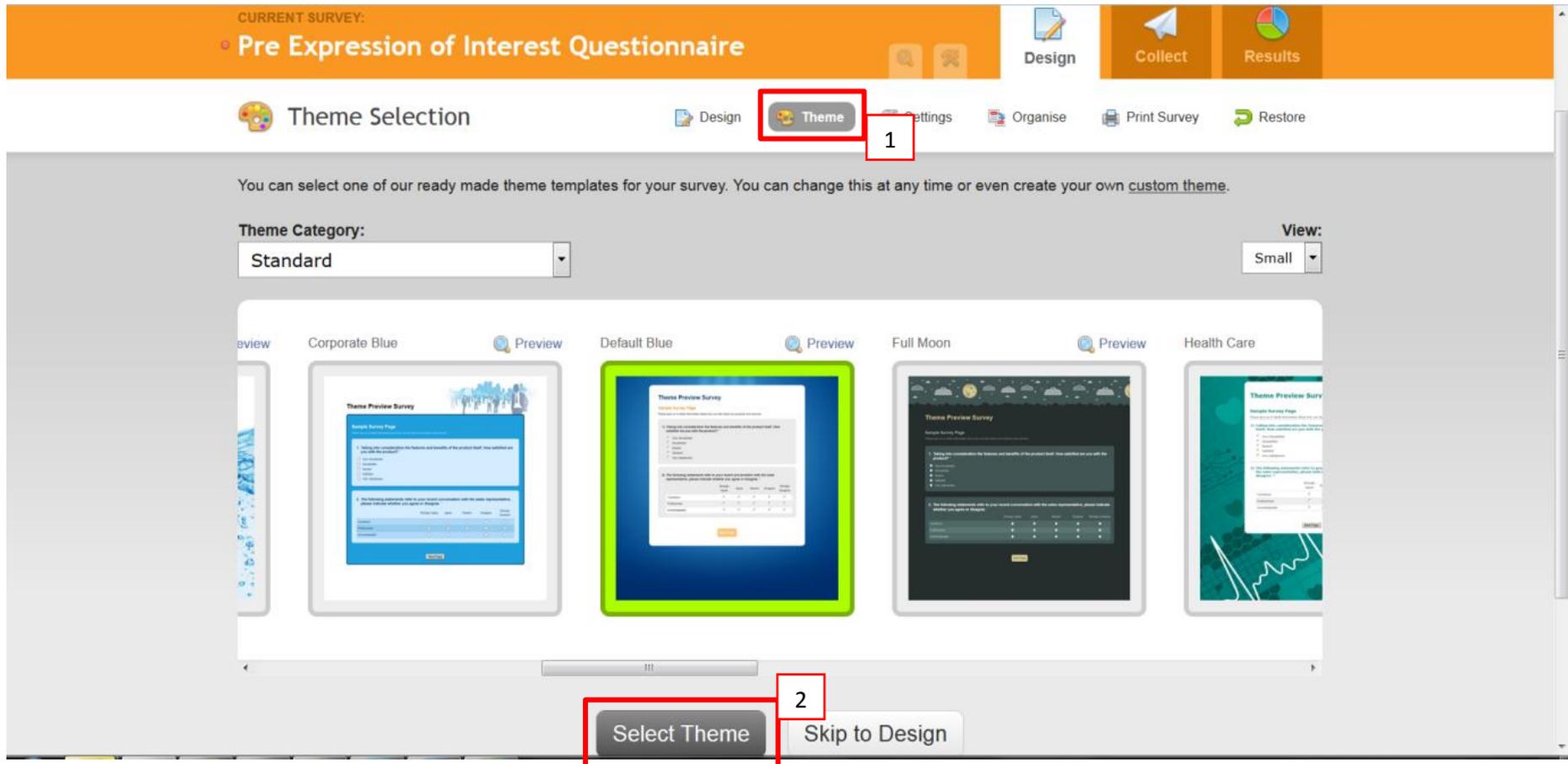
These four templates are editable by yourselves and the Federation hold the originals. Therefore if you would like to have an original copy after you have made changes you will need to contact [ruth.davies@fiss.org](mailto:ruth.davies@fiss.org) who will be able to prvide you with an additional copy.



The screenshot shows the SmartSurvey 'My Surveys' dashboard. At the top, there is a navigation bar with 'Dashboard', 'My Surveys', 'Resources', 'Support', and 'Logout'. Below this is a header with account information: 'Account Number: s53265 | You have a CORPORATE USER account | If you need any help, please create a support ticket'. The main content area is titled 'My Surveys' and includes a 'Create New Survey' button. Below this is a search bar and a 'Manage' button. The main part of the dashboard is a table listing four surveys:

Status	Survey Title	Sort	Created	Sort	Design	Collect	Results	Sort	Options
●	<a href="#">Consultations on the assessment implementation details</a>		24 Sep 2014 14:53					0	Copy Clear Delete
●	<a href="#">Draft Standard Consultaion and high level assessment</a>		24 Sep 2014 12:01					0	Copy Clear Delete
●	<a href="#">Pre Expression of Interest</a>		24 Sep 2014 11:51					0	Copy Clear Delete
●	<a href="#">Questions for all consultations</a>		24 Sep 2014 09:32					0	Copy Clear Delete

Double click on the survey you want to open and you will be taken to that survey. Once you have done this you will be able to go to the survey theme in the menu across the top of the page (1). The theme is the background design for the survey of which there are several you can choose from although we would recommend that you stay to something professional or related to your standard area. The more vibrant and busy that the theme is the more it could distract respondents from the questions. When you have browsed through and chosen your design you will need to choose the 'select theme' button at the bottom of the page (2).

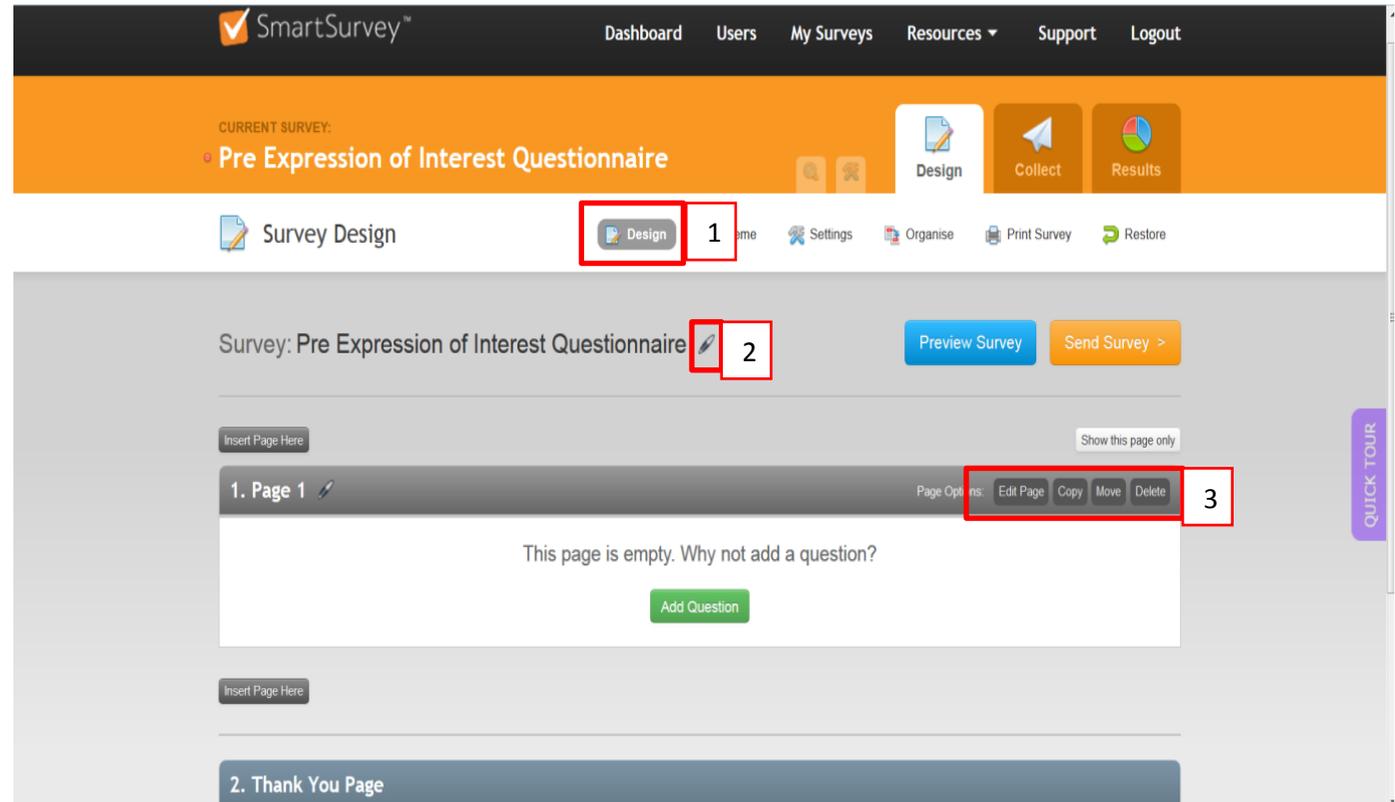


By selecting the design tab across the top of the page (1) you will be taken to the page of the survey where all the questions are loaded and if you have already copied your survey you will be able to edit your questions and the pages within the survey.

On this page you will see a pen symbol (2), where this appears it means that you can edit the wording. Simply click on the pen and a pop up will appear for you to amend the details. When there are free text areas the system uses HTML codes for paragraphs and bold text etc. to help you with this some HTML codes are detailed later in the document.

You also have the option to edit/copy/move/delete the page by selecting the options at the top of the survey page (3). However **please be aware that by deleting the page you will not be able to restore it.**

To add any questions simply click on the green 'add question' button and a pop up will appear. Follow the details on the page as to how you do this.



When you select the green add question button the pop up you will see is shown below. You will have an open text box where you can enter the question you would like to ask. There are sample questions that can be viewed if you would like ideas on how to ask the questions. You then have the ability to select the question type. These include; multiple choice, comments, matrix questions and depending on your selection will depend on what is then displayed under the Question type box.

**Add Question**

**Question**

Question Text Check spelling

Enable Editor

Question Type

-- Choose Question Type -- View Question Examples

Add Question from Library Cancel Add Question

**Add Question**

**Question**

Question Text Check spelling

What type of organisation do you represent?

Enable Editor

Question Type

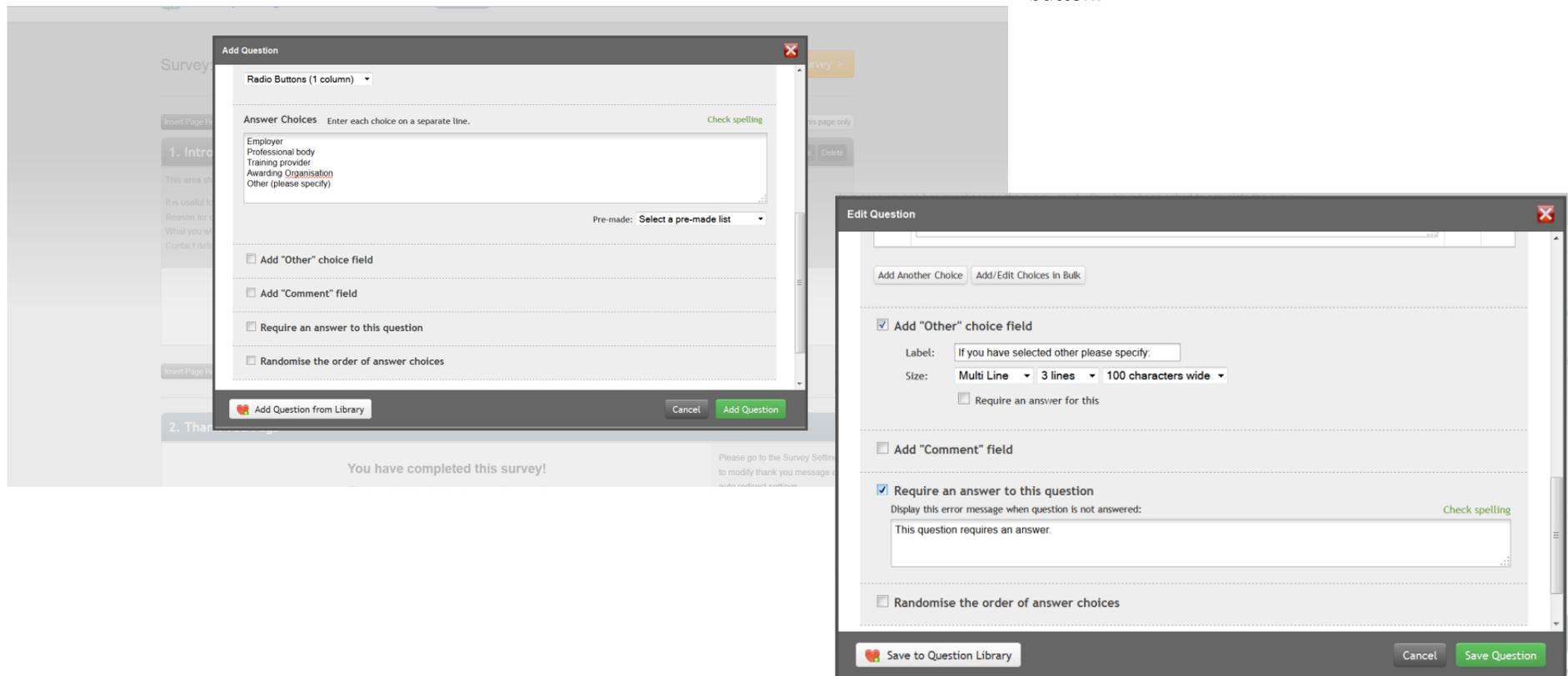
-- Choose Question Type -- View Question Examples

- Choose Question Type --
- Multiple Choice (Only One Answer)
- Multiple Choice (Multiple Answers)
- Comment/Essay Box
- Ranking
- Matrix of Choices (Only One Answer per Row)
- Matrix of Choices (Multiple Answers per Row)
- Matrix of Textboxes
- Matrix of Drop-down Menus
- Single Textbox
- Multiple Textboxes
- Descriptive Text
- Date/Time Box

Add Question from Library Cancel Add Question

The display shown below is for the multiple choice question type. You can select how respondents answer although the common is through radio buttons, as well as add the answer choices. These should be clear, succinct and each response entered onto a separate line. If you did want an 'other' choice with the opportunity for respondents to then expand and explain, then you are best to use the 'Add "Other" choice field' as this will automatically provide the option in the answer choices and a box for expansion.

If you would just like the respondents to add additional comments if they have any select the add comment field, you can edit the wording and space available. If you would like the question to be a mandatory question for all respondents than you will need to select the 'require an answer to this question field' likewise if you would like to remove this function simply un-tick the box. When you have completed the question select the green save question button.



## Editing existing questions

If you would like to edit any pre-set questions or you have made a mistake you can edit any of the developments already discussed in this guide by simply selecting the edit question button (1) which will open the question pop up again for you to make any changes. In this screen image you will notice that there is a red asterisk (\*) (2) in front of question 3, this identifies that this question is a mandatory question and question 2 is not. Please bear this in mind when using a pre-existing survey developed by the Federation as you may want to amend this so that the survey meets your needs.

The screenshot displays a survey editor interface for a survey titled "Draft Standard Consultaion and high level assessme...". The interface shows two questions, Q2 and Q3, with their respective editing options and a right-hand sidebar containing a "QUICK TOUR" button.

**Question 2 (Q2):** "2. If you are an employer - how many employees do you have?"

- <10
- 10-49
- 50-249
- 250-499
- >500

**Question 3 (Q3):** "\*3. Do you currently employ apprentices in this occupation?"

- Yes
- No

If you do not currently employ apprentices please explain why:

The interface includes a "Navigate" dropdown menu set to "-- Select Page --", a "Top" button, and a "Preview Survey" button. For each question, there are "Add Question Here" and "Split Page Here" buttons, and a "Required" checkbox (checked for Q3). The right-hand sidebar for each question contains: "Edit Question" (highlighted with a red box and labeled '1'), "Copy Question", "Move Question", "Skip Logic", and "Delete Question". A "QUICK TOUR" button is located on the far right.

## Ending your survey

When you have finished the survey questions you will need to amend the 'closing' page. This is automatically titled Thank You Page in the surveys. However, you have the ability to add your own message in the space provided and we recommend you personalise this by providing information on the next steps, such as; will you contact them, what will you do with the responses etc. you can access this area in two ways – either select the change setting shown in the first image or select the settings tab at the top of your screen shown in the second

The image consists of two screenshots from the SmartSurvey web application. The top screenshot shows the 'Survey: Pre Expression of Interest Questionnaire' editor. It features a list of radio button options: Professional Body, Trade press, Social media, Your employer, and Other (please specify). Below these is a text input field and an 'Add Question Here' button. On the right side, there are 'Skip Logic' and 'Delete Question' options. At the bottom of the editor, a '4. Thank You Page' section is visible, containing the text 'You have completed this survey!' and 'Thank you for taking the time to answer this survey!'. Below this text is an 'Auto Redirect' status bar and a 'Change Settings' button, which is highlighted with a red rectangle. The bottom screenshot shows the SmartSurvey dashboard. The top navigation bar includes 'Dashboard', 'Users', 'My Surveys', 'Resources', 'Support', and 'Logout'. Below this, the current survey is identified as 'Consultations on the assessment implementatio...'. A 'Survey Design' section contains several tabs: 'Design', 'Theme', 'Settings' (highlighted with a red rectangle), 'Organise', 'Print Survey', and 'Restore'. At the bottom of the dashboard, there are 'Preview Survey' and 'Send Survey >' buttons.

Once in the settings you will need to select the 'finish' tab from the list on the left of the screen. Here you will be able to amend the text displayed on the final page and also an automatic redirect. This can be to a page on your website or something that you would like to promote. The standard set up is for the page to be automatically redirected to smart survey unless you enter a new URL. You can also set the time delay in how long a respondent has to read this page so please bear this in mind with how much text you enter on this page.

The screenshot displays the 'Survey Settings' interface. On the left is a sidebar with the following menu items: General, Features, Appearance, Logo, Finish (highlighted), Save and Continue, Security, and Restrictions. Below the sidebar is a green 'Save Changes' button. The main content area is titled 'General' and contains the following sections:

- Final Page Text**:
  - Heading Text:
  - Thank you text:
- Auto Redirect**:
  - Enable Redirect:
  - Address (URL):
  - Jump After:  seconds
- Disqualify Auto Redirect**:
  - Address (URL):
- Print Response Feature**:
  - Enable Summary:

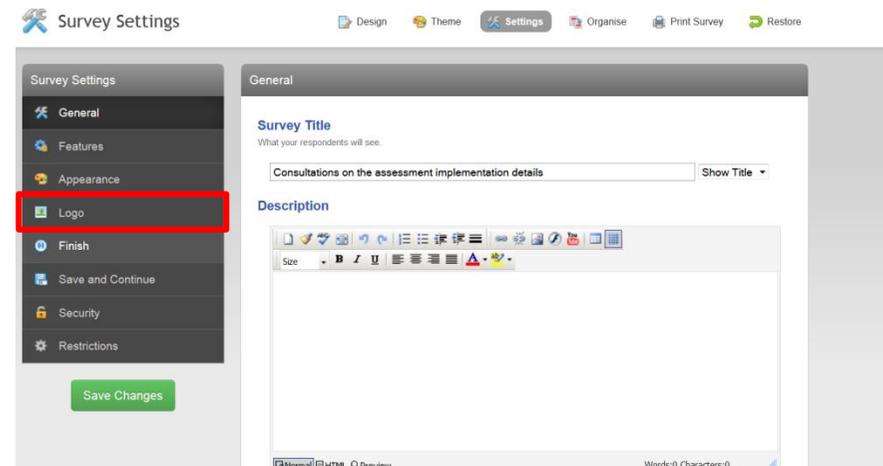
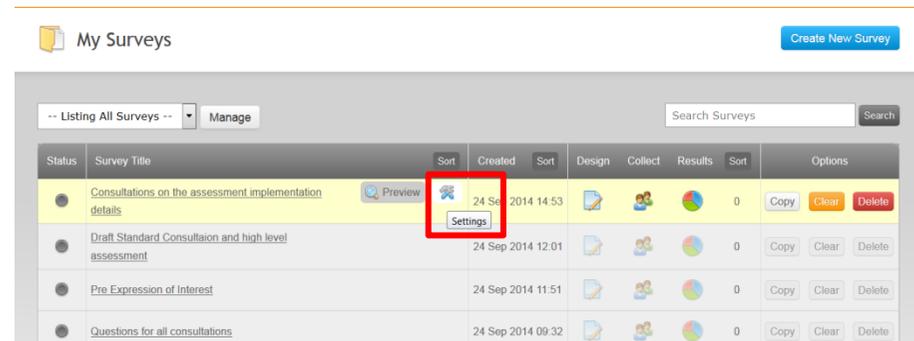
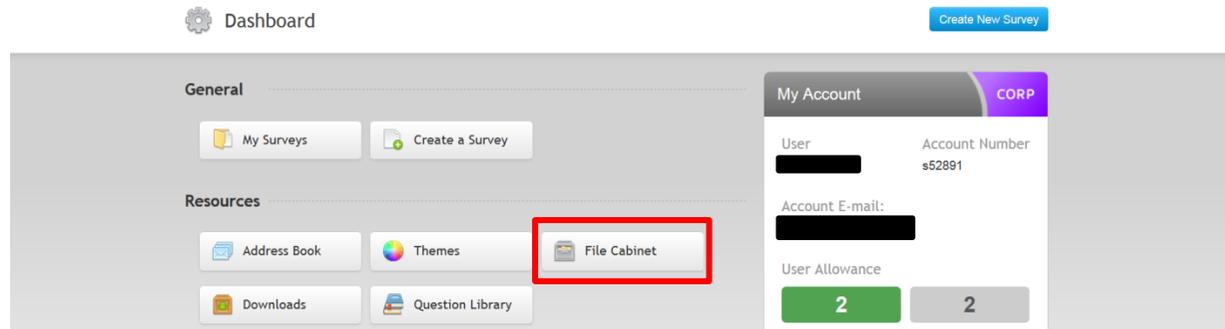
## Add your own logo

When on your dashboard page select the option file cabinet. This will take you to a new page that will initially say 'you have no files' if you select the green upload file button, a pop up will appear where you can browse your files.

Follow the steps to browse and select the logo you wish to add to the survey. Once you have done this the file will be stored in the file cabinet on the system.

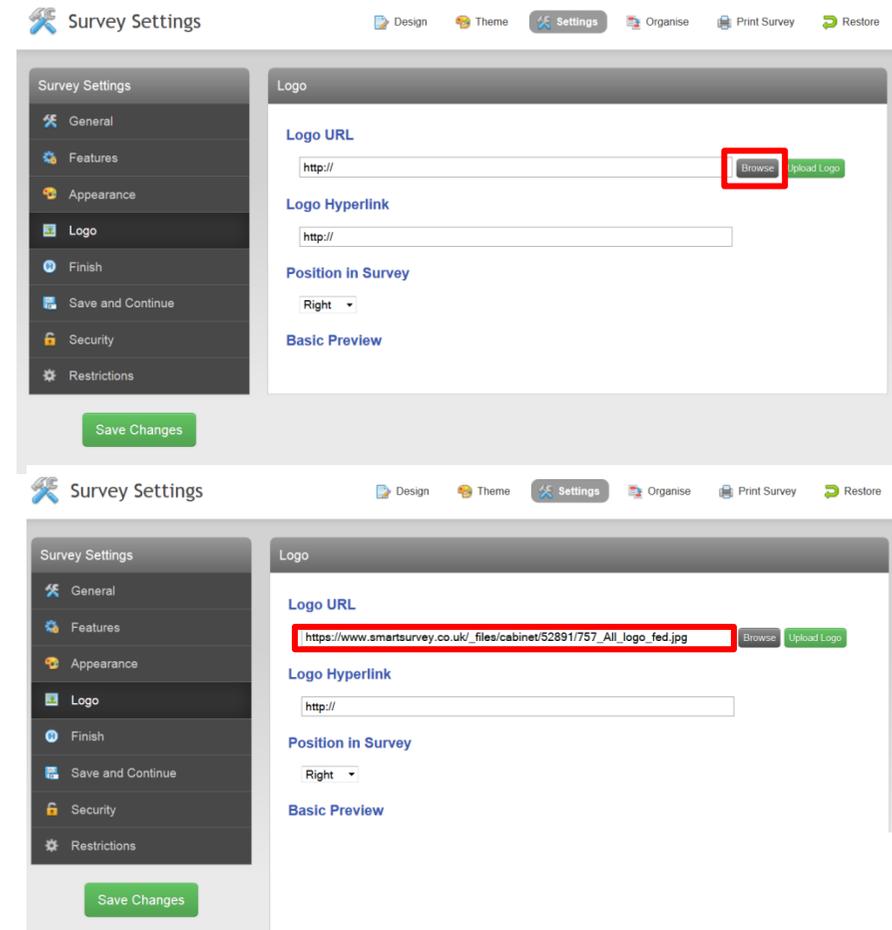
Go to the 'My Surveys' page from the dashboard. This will list all of the surveys currently in your account that you can view. If you hover over the survey that you would like to add the logo to the settings image will be displayed (this is a hammer and spanner image).

Once you have selected the settings option you will be taken to the setting page for the survey with a menu of options on the left hand side. From this list select the option 'Logo'.



You will see the screen to the right giving you several options. As you have already loaded the file to your filing cabinet online, you can select the browse option where a pop up will show you the contents of your filing cabinet. Choose the logo file that you previously loaded to the system by clicking on the file name. This will return you to the setting screen and under the logo URL will be a file path name and you can view the logo under the basic preview heading. Once you are satisfied with the logo select the green button 'save changes' which will save the logo to the survey.

If you have loaded the wrong logo to the survey you can change this by simply browsing for a new file and re saving the changes. The survey will pick up the new file path name and store this against your survey.



## Useful HTML Codes

You may have seen in some coding for websites or when working on line what seem to be random letters like <p>. These are what are known as HTML codes and allow the internet to understand what you are asking it to do. Within the questions and free text areas of the surveys HTML codes are used to determine things like a new paragraph or bold writing. Some of the common HTML codes that you may need are listed below with an example of how to use the codes:

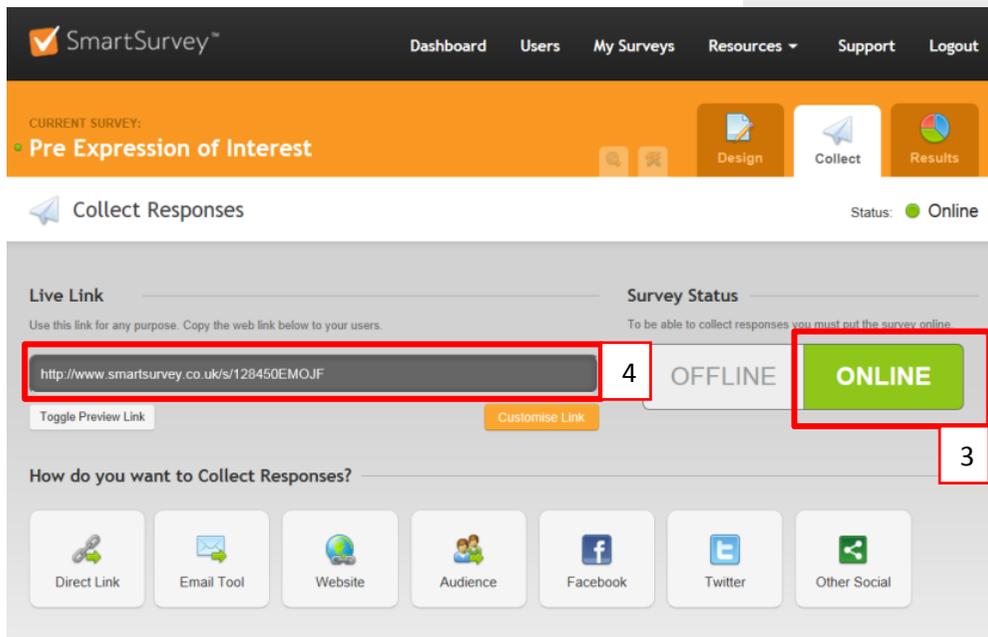
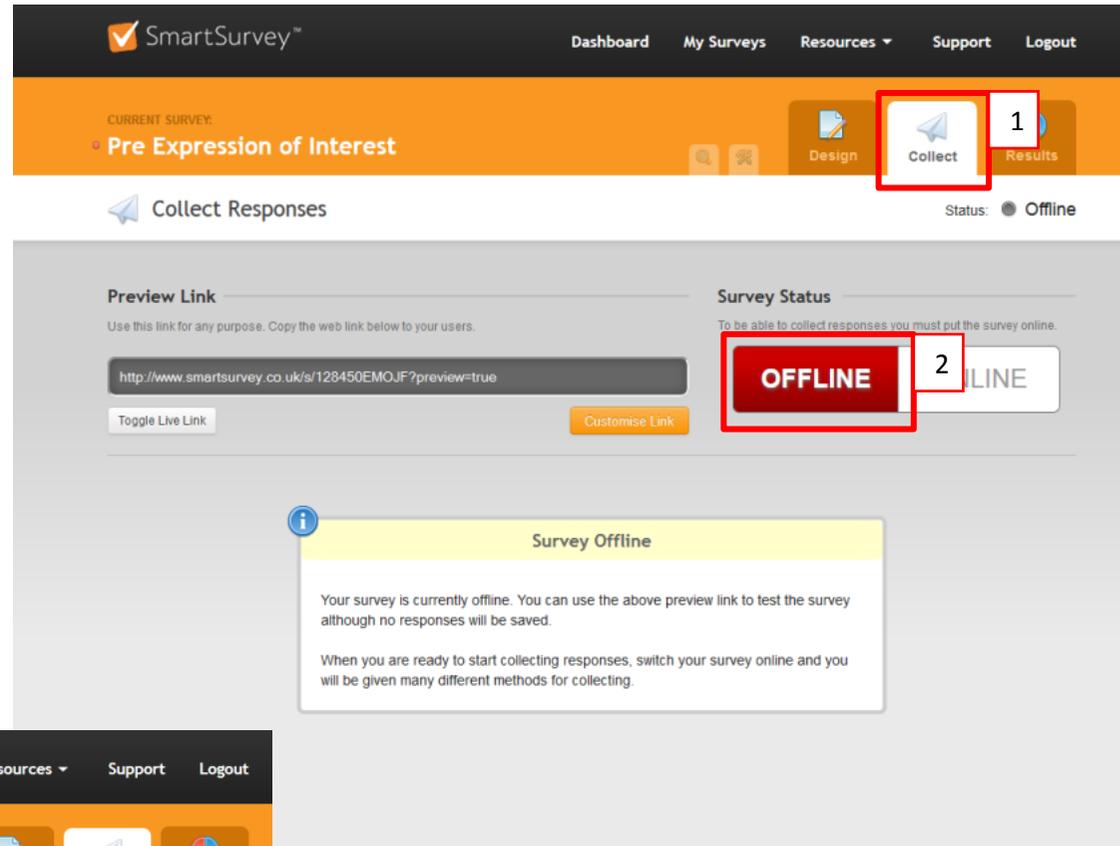
Action	HTML code	Example
New paragraph	<p>	This paragraph ends here. <p> The new paragraph starts here.
Bold writing	<b>	I would like to emphasise the word <b>skills</b> within this text.
Italic writing	<i>	I would like to make some text <i>italic</i> format to make it stand out.
Break in a line of text	 	I would like to show  My text in broken lines  Like a list would  Look 

## Sending out your survey

When you have completed your survey and you are ready to send to respondent to complete you will need to switch your survey to 'online'.

In order to do this you will need to go to the 'Collect' tab at the top of the page (1).

You will see towards the right hand side that the survey is currently 'OFFLINE' highlighted in red (2). When you want to allow respondents to complete the survey click on the 'ONLINE' button which will turn green (3) and offer you several choices of how you would like to collect responses.



If you would like to send an email you can either follow the steps on the system or you can copy the link shown in the live link area (4) which you can then include in any email correspondence or use for hyperlinks on your website.

## Results

You can monitor your results throughout the survey being live but at the end of the survey you will want to be able to access all of the respondent's answers. In order to get to them you will need to select the 'Results' tab at the top of the page (1). Once on the results page you will see when the survey was created and a breakdown of how many respondents started and completed the survey (2).

The responses are given for each question but also broken down per page. Therefore do not panic if you see no responses initially as you may be on page one which if you followed the template set up is a text page where there are no questions and therefore you will need to start at page 2. You can navigate through the pages at the top of the responses (3).

There are then several options for you to access the results, you can print them, send them to a word document (4) or export them into a CSV file (5). All of which will be determined by your preference but if you do need any assistance in how best to view the results, please contact the Federation.

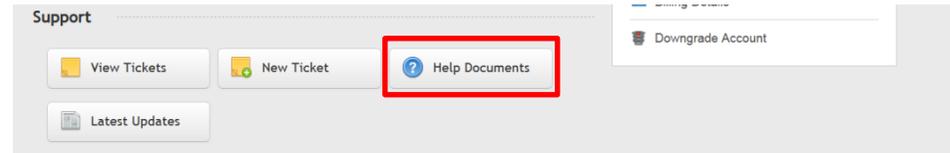
The screenshot shows the SmartSurvey interface for the 'ACE-IT Events' survey. At the top, the 'Results' tab is highlighted with a red box and labeled '1'. Below the navigation bar, the 'Export' button is highlighted with a red box and labeled '5'. The 'Results Summary' section contains a table with statistics: Survey Created (01/08/2014), Started (523), Partial (110), and Completed (413). This table is highlighted with a red box and labeled '2'. To the right of the statistics are buttons for 'Print Friendly', 'Send to Word', 'Filter Summary', and 'Key Analysis', which are highlighted with a red box and labeled '4'. Below the summary, a 'Navigate' section shows 'Page 2' selected, highlighted with a red box and labeled '3'. The main content area shows question 2: 'Please provide your name:'. Below this is a table with columns for 'Response Percent' and 'Response Total'. The table shows 100.00% answered (413) and 0% skipped (0). Below the table is question 3: 'Please provide your organisation name:'.

Survey Created	Started	Partial	Completed
01/08/2014	523	110	413

Response Percent	Response Total
100.00%	413
answered	413
skipped	0

## Contact

If you have any questions about how to do something within SmartSurvey then you should first use their extensive help section which can be found on your dashboard as the 'help documents' tab under Support.



You can also contact the Federation on:

Tel: 0300 303 4444

Email: [ruth.davies@fisss.org](mailto:ruth.davies@fisss.org)

Or SmartSurvey directly on:

Tel: 0800 0937 822

Email: [support@smartsurvey.co.uk](mailto:support@smartsurvey.co.uk)