

Survey Administration

Managing a Live Survey
Using a Distribution List

Introduction

This material provides an overview of the Survey Admin page and the features available to you when you've created a survey that uses a distribution list you uploaded.

Enabled Benchmarks 7

3

Select benchmarks to put your survey data into context. We have a large array of benchmarks to choose from, including location-specific and industry-specific scores. And don't worry...your decisions aren't final. You can change your selections later. Survey benchmarks are based on a 3-year rolling set of Kincentric client data, and are weighted to reflect the global or regional workforce as appropriate.

Click to add benchmarks

Global Best Employer X Global Average X Global Top Quartile

Employee Data Source

Choose Your Employee Data Source and File

Select where your employee data, like employee attributes (EX: gender) and employee hierarchies, comes from. This will be the definitive source of data about your employees for this survey

Other Source

Choose Your Source

Employee File (With Hierarchies) 7

Hierarchy Structure 7

Other Source 7

Save Save and go to next step

Steps

Quarterly Engagement

- 1 Initial survey setup
- 2 Define survey content
Survey title, intro, and logo
Add questions
Manage Dimensions
- 3 Design your survey
- 4 Distribute your survey
- 5 Setup survey reporting
- 6 Confirm and schedule

Using 'Other Source' in Step 1

Survey Admin Edit Survey

Survey Name Multiple Events - Distribution Lists
Program Type Custom
Employee Data Source Other source
Reporting Application My Reports (eX-Pulse)

Survey Administration

Preview Survey Survey Overview Benchmarks
Reporting Users Trend To Cancel Survey
Anonymity Threshold Manage Dimensions Re-Open Survey

Events

Duplicate employee IDs will be removed from distribution upon publish so that an employee does not receive two survey email links. Expect changes to your employee count if this occurs.

Add New Audience

NAME	OPEN DATE	CLOSE DATE	DISTRIBUTION	EMPLOYEES
No email addresses	Dec 15, 2022 at 11:38am CST	Jun 29, 2023 at 12:00am CDT	A single link you send	--
Everyone with email addresses	Dec 15, 2022 at 11:38am CST	Jun 30, 2023 at 12:00am CDT	Unique link for each employee	108

Survey Admin Page

The Survey Admin is used to Manage your survey while it's live and make changes to the reporting site.

The tiles that appear will vary depending on different options you chose when designing your survey.

Each tile will provide you with options to either edit selections or view the selections depending on what phase your survey is in.

The Events section contains each audience you created and tiles specific to manage them.

The screenshot displays the Survey Admin interface. At the top right, there is a green 'Edit Survey' button. Below the header, survey details are listed: Survey Name (Multiple Events - Distribution Lists), Program Type (Custom), Employee Data Source (Other source), and Reporting Application (My Reports (eX-Pulse)).

The 'Survey Administration' section features a grid of nine tiles: Preview Survey, Survey Overview, Benchmarks, Reporting Users, Trend To, Cancel Survey, Anonymity Threshold, Manage Dimensions, and Re-Open Survey.

The 'Events' section includes a notification: 'Duplicate employee IDs will be removed from distribution upon publish so that an employee does not receive two survey email links. Expect changes to your employee count if this occurs.' Below this is an 'Add New Audience' button and a table of survey events.

NAME	OPEN DATE	CLOSE DATE	DISTRIBUTION	EMPLOYEES
No email addresses	Dec 15, 2022 at 11:38am CST	Jun 29, 2023 at 12:00am CDT	A single link you send	--
Everyone with email addresses	Dec 15, 2022 at 11:38am CST	Jun 30, 2023 at 12:00am CDT	Unique link for each employee	108

Edit Survey

The 'Edit Survey' button allows you to edit specific elements of a live survey.

- Survey Title & Translations
- Survey Intro & Translations
- Survey Definitions & Translations
- Response Required Option
- Question Text & Translations
 - Use this feature with caution. It should primarily be used to correct typos or small spelling/translation changes.
 - Changing the entire wording of a question could impact the participants perception of the question and produce an undesired result.

The screenshot displays the 'Survey Admin' interface. At the top right, a green 'Edit Survey' button is highlighted with a red rectangular border. Below the header, a table lists survey details:

Survey Name	Q2 Quarterly Pulse
Program Type	Custom
Employee Data Source	Other source
Reporting Application	Thrive

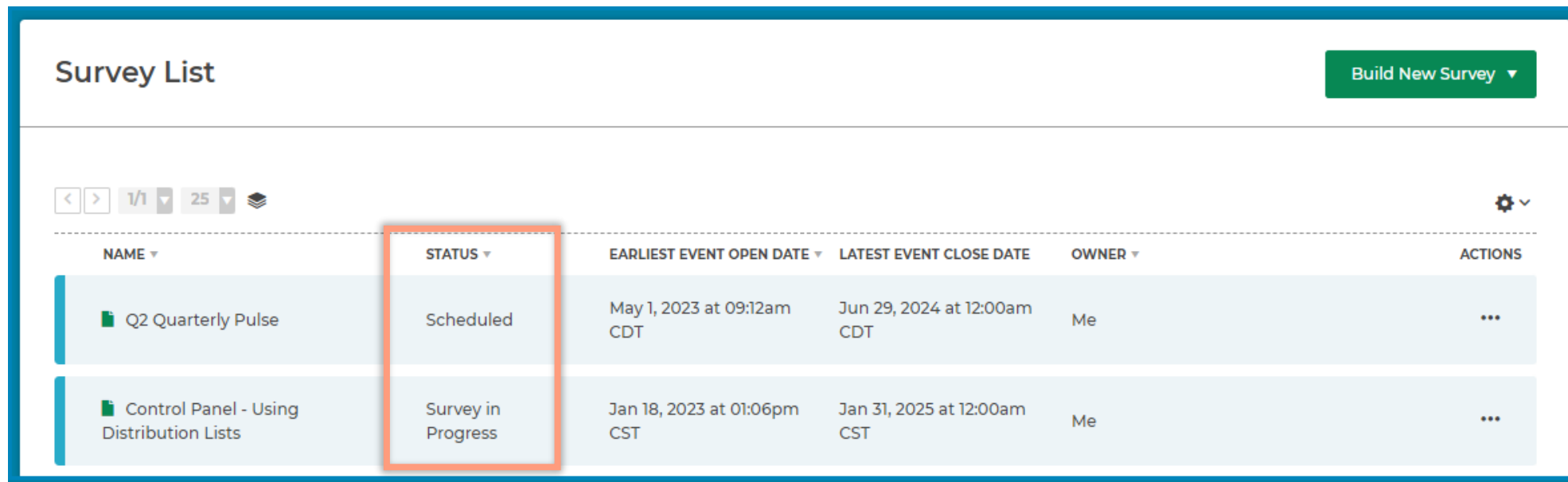
Below the table is a dark grey bar labeled 'Survey Administration'. Underneath this bar is a grid of nine light blue rectangular buttons with rounded corners and a small blue triangle in the top right corner. The buttons are arranged in three rows and three columns:

- Row 1: Preview Survey, Survey Overview, Benchmarks
- Row 2: Reporting Users, Trend To, Cancel Survey
- Row 3: Anonymity Threshold, Manage Dimensions, Re-Open Survey

Edit Survey

When you make a change and click the 'Sync' button our system will begin updating your survey.

- Changes should only take a few minutes to process
- The status on the Survey List page will change to 'Scheduled' while the process is launching.
- When the synch is completed, the status will change to 'Survey in Progress'



The screenshot shows a 'Survey List' interface with a table of surveys. The 'STATUS' column is highlighted with an orange box. The table has the following data:

NAME	STATUS	EARLIEST EVENT OPEN DATE	LATEST EVENT CLOSE DATE	OWNER	ACTIONS
Q2 Quarterly Pulse	Scheduled	May 1, 2023 at 09:12am CDT	Jun 29, 2024 at 12:00am CDT	Me	...
Control Panel - Using Distribution Lists	Survey in Progress	Jan 18, 2023 at 01:06pm CST	Jan 31, 2025 at 12:00am CST	Me	...

Edit Survey

Make the desired changes to the survey and click 'Sync'.

Participant Experience

- Any participant that is currently taking the survey will not observe any disruption.
- If a change is made to a page they have not viewed yet, your changes will be seen when they get to the page.
- If a change is made to a page they have already completed, they will not see the change.
- If you change a question to required and the participant has already viewed the page and not entered a response, they will be prompted to return to the page when they try to submit the survey.

Live Survey: Making edits to your survey will cause changes to the live version and potentially create discrepancies between people who have finished and not finished taking the survey.

Survey Title: Q2 Quarterly Pulse

Survey Intro: This is the introductory text to your survey. If you're using a survey intro, be sure it's translated into all of your enabled languages.

Survey Definitions: Add framing around your survey with definitions that will anchor employees in the appropriate context.

Term	Definition
Direct Leader	The person who gives me a performance review that I report to in the reporting hierarchy within Workday
Group Leader	The person who supervises my work (for non-manufacturing employees, this is the person you report directly to)
Supervisor	The person who supervises my work (for non-CCA employees, this is the person you report directly to)
Company	The entity for which I work (e.g., Superior Kitchens, Superior Kitchens China, or Superior Korea)
Site	The entire complex at which you work, not the specific building within the Complex.

Questions:

QUESTION ID	QUESTION	RESPONSE REQUIRED	TRANSLATIONS
EN006	This organization motivates me to contribute more than is normally required to complete my work	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN003	This organization inspires me to do my best work every day	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN001	It would take a lot to get me to leave this organization	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN002	I would not hesitate to recommend this organization to a friend seeking employment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN004	I rarely think about leaving this organization to work somewhere else	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN005	Given the opportunity, I tell others great things about working here	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EN043	My manager ensures that tasks without defined owners are distributed fairly within the team	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Preview Survey

Preview Survey will launch a survey in a new tab so you can view and walk through it.

- Survey responses are not recorded when you view the survey through the preview survey option.
- If a survey is in progress, you will not have the option to add, delete or change the survey since this would impact existing responses.

Survey Overview

Survey Overview is a summary of all the selections made during the design process.

- You cannot change or edit anything on this page but its handy when you want to view the design in its entirety.
- It will display any warnings or issues that need to be resolved such as reminder dates being set after the survey close date.
- Navigate back to the Survey Admin by clicking Survey Admin in the Breadcrumbs bar or clicking the back button in your browser.

KINCENTRIC A Spencer Stuart Company

Instructional Video
Send Email

Survey Admin / Survey Overview

Survey Overview

Summary

Program Type	Custom
Survey Name	2022 Engagement
Employee Data Source	Employee file (with hierarchies)
Languages	<ul style="list-style-type: none">English (United States)French (France)
Benchmarks	<ul style="list-style-type: none">Global AverageGlobal Best EmployerGlobal Top Quartile
Survey Title	Engagement Survey
Survey Intro	Greetings. We are successful because of you. Learning what you think and how you feel about working at our company is important to understanding what we need to do to as an organization to be your employer of choice. Because you have been so vital to our success, we want to hear what you think through this Employee Engagement Survey.

Benchmarks

Benchmarks are editable even after the survey closes.

- You can delete existing selections
- Search and select new benchmarks
- Once you save your selections, the changes will be automatically changed in your reporting site.

Benchmarks

Enabled Benchmarks ⓘ

3

Select benchmarks to compare your survey data against. We have a large array of benchmarks including location-specific and industry-specific to choose from.

[Click to add benchmarks](#)

Global Best Employer ✕ Global Average ✕ Global Top Quartile ✕

[Save Changes](#)

Reporting Users

Reporting Users lets you view the list of people who will have access to My Reports once the survey closes.

- This page will always be editable even after the survey closes.
- You can add or remove users at anytime and edit the scope.
- Once the survey closes, this page will become read only.

Reporting Users

Reporting Users - Individually 2

Give reporting access one user at a time, up to 50 users. These users will have access to the overall survey results. An invitation will be sent to the user upon survey close.

FIRST NAME	LAST NAME	EMAIL	
Tom	Hanks	lapislazuli.TomHanks@modernsurvey.com	
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Email"/>	

Add Users Add new user for reporting access

Send invitation

Remove User

Save Changes

Trend To

Trend To allows you to change which survey you want this survey compared to in the reporting site.

- Simply select the Survey from the drop-down menu and click Save Changes.

Trend Your Results

Trend Your Results

Instructions

Trending allows you to compare your survey audience's results against past surveys they've taken. To do this, select the trend group below that best matches your survey audience. If you're still confused about trending, [watch our short video](#).

Chosen Trend Group

Trend Groups

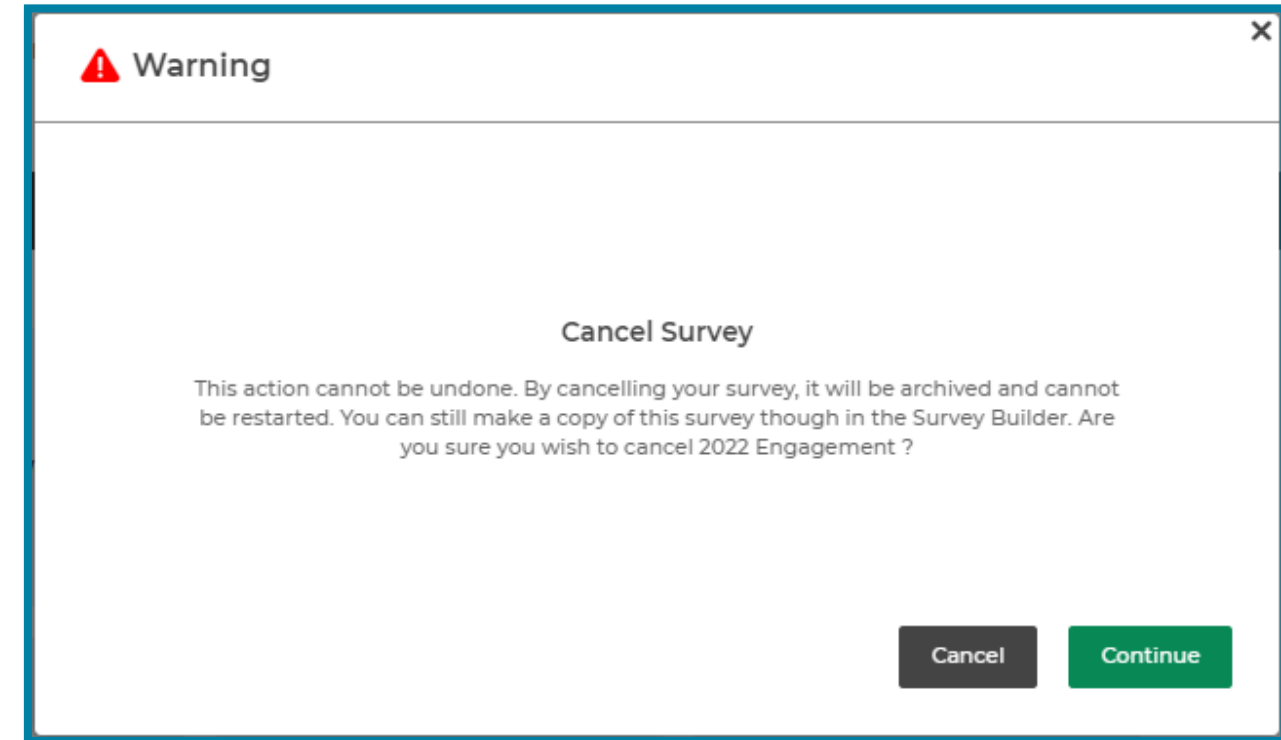
Previous Surveys

These are the Pulse surveys you've previously conducted for Trend Groups that will be used for trending. Note: Users with access to this survey's reporting site will only see the trend surveys that they also have reporting access to. [?](#)

Cancel Survey

Cancel Survey allows you to cancel a survey while it is in progress.

- This feature will immediately cancel a survey
- When a participant clicks on the link in their invitation, the survey will display a message that the survey has been cancelled.
- This will apply to everyone that was invited to take the survey regardless of what administration they are in.
- No data will be sent to the Reporting site when a survey is cancelled.
 - If you want the data to be available in reporting, change the Close Date for each event.



NAME	OPEN DATE	CLOSE DATE	DISTRIBUTION	EMPLOYEES
Senior Mangers - 1 day before everyone else	Feb 28, 2023 at 01:00pm CST	Dec 30, 2023 at 12:00am CST	Unique link for each employee	--

Anonymity Threshold

Anonymity Threshold shows you the Minimum Number of responses for charts and graphs in the reporting site.

- This is for viewing purposes only.
- If you need this changed, please reach out to your Kincentric project team.

Anonymity Threshold

Anonymity Threshold ⓘ 5

Save Changes

Manage Dimensions

Manage Dimensions allows you to manage the dimension each question is assigned to while the survey is live and after it closes.



- All the same features are available in this view as when you designed the survey.
- Changes made during a live survey will be sent to the reporting site when the survey closes.
- Changes made after the survey closes will be processed and sent to reporting, please allow 5-10 minutes to see the changes in reporting.

Manage Survey Dimensions

Survey dimension organize questions under broad categories for this survey. Selected scored questions can only be listed **under 1 scored dimension at a time.**

[Create Dimension](#)

Total selected survey questions 6

NAME	QUESTIONS	RESPONSE OPTION	SCORED	ACTIONS
Engagement	6	6-Point Agree	--	 

Bulk Actions

! Engagement questions are restricted from moving to other dimension types

	QUESTION	RESPONSE OPTION
<input type="checkbox"/>	This organization motivates me to contribute more than is normally required to complete my work	6-Point Agree
<input type="checkbox"/>	This organization inspires me to do my best work every day	6-Point Agree
<input type="checkbox"/>	It would take a lot to get me to leave this organization	6-Point Agree
<input type="checkbox"/>	I would not hesitate to recommend this organization to a friend seeking employment	6-Point Agree
<input type="checkbox"/>	I rarely think about leaving this organization to work somewhere else	6-Point Agree
<input type="checkbox"/>	Given the opportunity, I tell others great things about working here	6-Point Agree
	No Dimensions	--

Re-Open Survey for Everyone

When all the events in the survey are closed, you can re-open the survey for everyone.

- Enter in a new close date and time
- Click: Save Changes


Participants in any event will now be able to access the survey. If you want to only open the survey for a specific administration, click on the event in the [Events](#) section.

Awareness: If users already have access to the reporting site, the existing data will change after the new survey close date.

Re-Open Survey

Instructions

Your survey will reopen when a close date is selected



[Clear Date](#)

Time Zone

CDT (GMT -05:00)

[Save Changes](#)

Events Section

The Events Section is where you can manage each audience individually based on your needs.

- Each audience is listed, from here you can add a new audience or take action on a single audience.
- Adding a new audience creates another distribution and follows the exact process you used when designing your survey.
- To make changes to an audience, click on the name of the desired audience to see all the tiles.

The screenshot shows the 'Events' section of a survey tool. At the top, there is a dark header with the word 'Events'. Below the header, a dark grey box contains a warning message: 'Duplicate employee IDs will be removed from distribution upon publish so that an employee does not receive two survey email links. Expect changes to your employee count if this occurs.' To the right of this message is a green 'Add New Audience' button. A blue callout box with a white border points to this button and contains the text 'Create another event'. Below the warning and button is a table with the following columns: NAME, OPEN DATE, CLOSE DATE, DISTRIBUTION, and EMPLOYEES. The table contains two rows of data. At the bottom of the screenshot, there are navigation arrows and a gear icon.

NAME	OPEN DATE	CLOSE DATE	DISTRIBUTION	EMPLOYEES
Everyone Else	Immediately	Mar 30, 2024 at 12:00am CDT	A single link our system sends	99
Sr. Manager (1 day before everyone else)	Immediately	Mar 30, 2024 at 12:00am CDT	A single link our system sends	6

When the survey was published, Survey Builder looked across events for people with the same Employee ID's and removed duplicates.

The number of employees may have changed after publish.

Audience Administration

The tiles on this page affect only the distribution that you selected in the Event Section on the previous page.

- This allows you to manage each administration separately and give you more control over your audience.

The screenshot displays the 'Audience Admin' interface. At the top, there is a header 'Audience Admin' and a sub-header 'Audience Administration'. Below the sub-header, there are seven light blue tiles with dark blue corner accents, arranged in three rows. The tiles are labeled as follows:

- Open / Close Dates
- Invite Email
- Reminder Emails
- Participation Monitor
- Distribution List
- Hierarchy View
- Reset Survey, Reopen Survey, Resend Invite
- Cancel Event


Open and Close Dates

Open and Close Dates will allow you to modify the survey Date and Time.

- When the survey is in progress, you cannot edit the start date.
- If the start date for this audience has been scheduled but not launched yet, the Start Date is editable.
- Simply select the new Date and Time and click Save Changes.
- This is handy if participation is low in one administration, and you want to extend the survey period.

Survey Open / Close Dates

Instructions These are the dates when your audience can take the survey. The invite email will be sent on the open date. We recommend you plan for at least 7 days for your employees to complete the survey.

Feb 28, 2023 at 01:00pm Dec 30, 2023 at 12:00am 

[Clear Date](#)

Time Zone CDT (GMT -05:00)

[Save Changes](#)

Invite Email

Invite Email allows you to edit the invitation text and send a test email.

- The invitation is not editable once the survey starts, in this phase it is Read Only.
- If invitations have not been sent yet, then you would have the ability to modify the email content.

Editable when open dates are in the future.

Invite Email (read-only)

Invite Email

Note: The invite email has already been sent out, changes are no longer allowed.

From ⓘ

Kincentric

Reply To ⓘ

randierickson@modernsurvey.com

Subject Line


The Employee Survey Is Here!

Content

Please do not forward this email!

The Employee Engagement Survey is now open! You have the opportunity to tell us what you think about working here. We'd like to hear about what you think we are doing well and what we could be doing better. Your feedback is critical to helping us plan for a successful future.

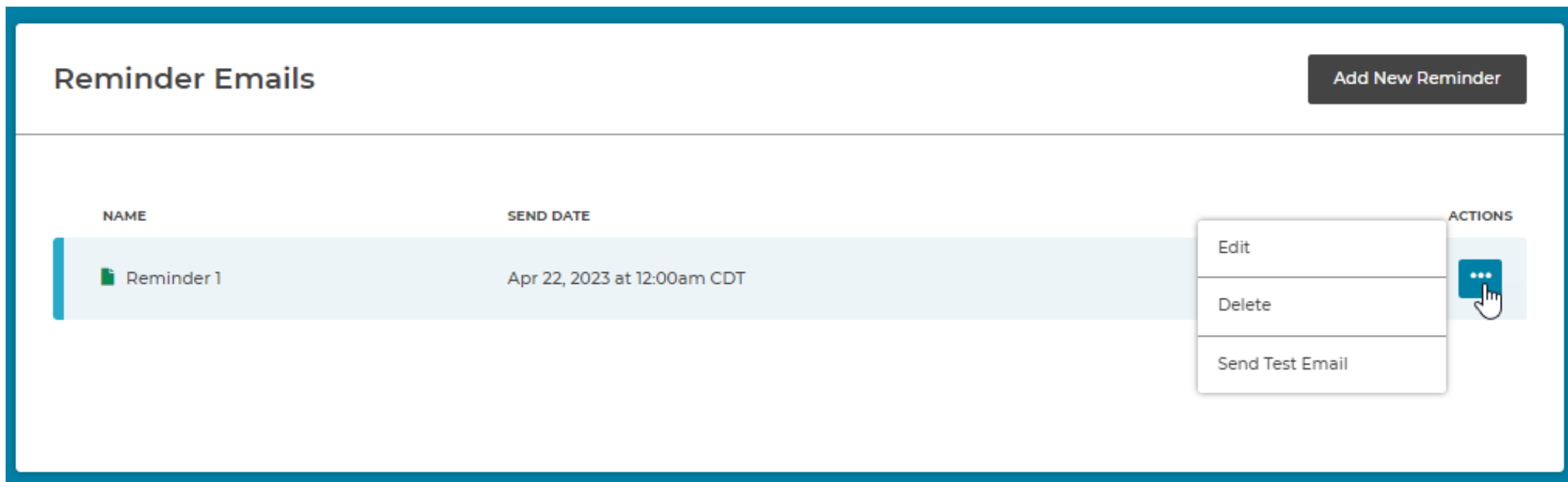
In order to maintain confidentiality, the survey will be administered by the consulting firm Kincentric. Your individual responses are confidential and no one from our company will have access to your answers. Kincentric will process the data and report the results to us, and we will share the results and our follow-up action plans with you. We will use the results to help us focus our efforts on things that make a difference to you.

NAME	OPEN DATE	CLOSE DATE	DISTRIBUTION	EMPLOYEES
 New Employees	May 20, 2023 at 12:00am CDT	Mar 30, 2024 at 12:00am CDT	Unique link for each employee	--


Reminder Email

Reminder Emails allows you to review existing reminders or create new ones.

- When a reminder date has passed, the information here becomes Read Only.
- You can create additional reminders by clicking Add New Reminder.
- Enter the details of the reminder and click Update Email.



The screenshot displays the "Reminder Emails" interface. At the top right, there is a button labeled "Add New Reminder". Below this is a table with the following structure:

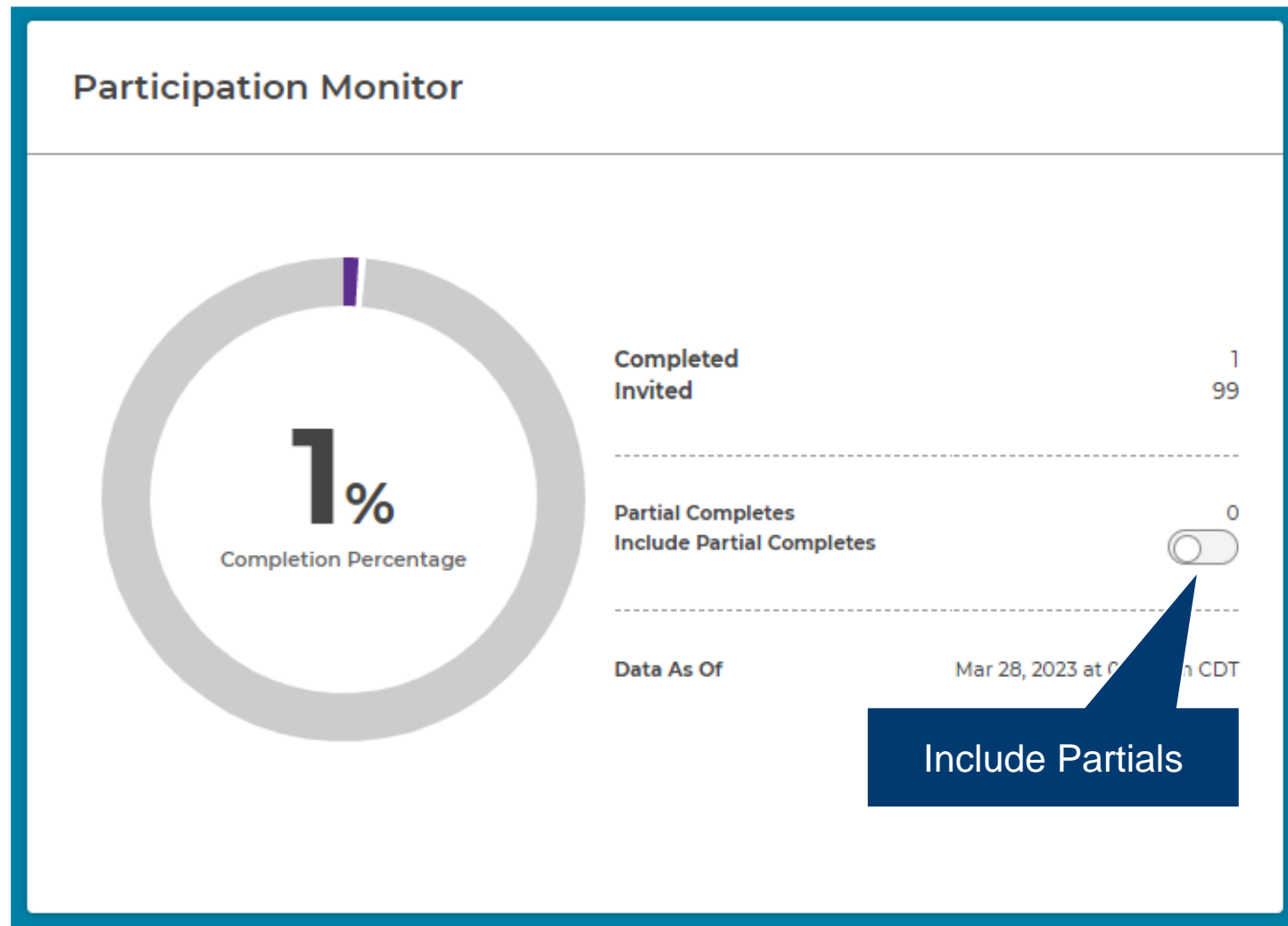
NAME	SEND DATE	ACTIONS
 Reminder 1	Apr 22, 2023 at 12:00am CDT	<ul style="list-style-type: none">EditDeleteSend Test Email

The "ACTIONS" column for the first row contains a menu with three options: "Edit", "Delete", and "Send Test Email". A hand cursor is shown clicking on the menu icon (three dots) in the "ACTIONS" column.

Participation Monitor

The Participation Monitor allows you to track how many people in this administration has started and completed the survey.

- You can use the toggle to include people who have started but not hit Submit Survey yet.
- The information on this page is refreshed every time you visit it.



Distribution List

The content of the Distribution List tile allows you to delete participants and upload new participants.

- Simply click Add New Participants and upload a distribution file with additional participants.
- To delete a participant, click the Trash Icon and Confirm the action.
- You can also delete them in bulk by checking the boxed and selecting Delete from the dropdown and clicking Continue.

The screenshot displays the 'Distribution List' interface. At the top right, there is a button labeled 'Add New Participants'. Below this, a 'Select Actions' dropdown menu is open, showing a 'Delete' option. The main area contains a table with columns for 'FIRST NAME', 'LAST NAME', 'EMAIL ADDRESS', and 'ACTIONS'. The table lists several participants, including Alan Arkin, Angelica, Anna, Ben, Betty, and Bruce. An 'Add New Participants' modal window is overlaid on the table, containing instructions: 'Download the template, fill it out, then upload it. After the upload, the new participants will be added to the main list.' The modal includes buttons for 'Download Template' and 'Upload File'. At the bottom of the modal, there are 'Close' and 'Append Distribution List' buttons.

	FIRST NAME ▲	LAST NAME ▼	EMAIL ADDRESS ▼	ACTIONS
<input checked="" type="checkbox"/>	Alan	Arkin	lapislazuli.AlanArkin@modernsurvey.com	
<input type="checkbox"/>	Angelica			
<input type="checkbox"/>	Anna			
<input type="checkbox"/>	Ben			
<input type="checkbox"/>	Betty			
<input type="checkbox"/>	Bruce			

Reset, Reopen and Resend

Reset, Reopen and Resend will allow you to manage actions for participants.

- The options available to you will depend on the survey status of the participants you selected.
- The options available to you are
 - Reset Survey
 - Reopen a completed survey
 - Resend an invitation
- For more information on how each of these features work, watch the [Reset Survey, Reopen Survey & Resend Invite](#) instructional video.

WARNING: Two or more employees share the same email address. If selected, each employee will receive a unique email with a link to their survey at the shared address.

Select Actions

- Reset Survey
- Reopen Completed Survey
- Resend Email

Applied to participants with the status of "Complete" or "In Progress". The Reopen survey action can only be applied to

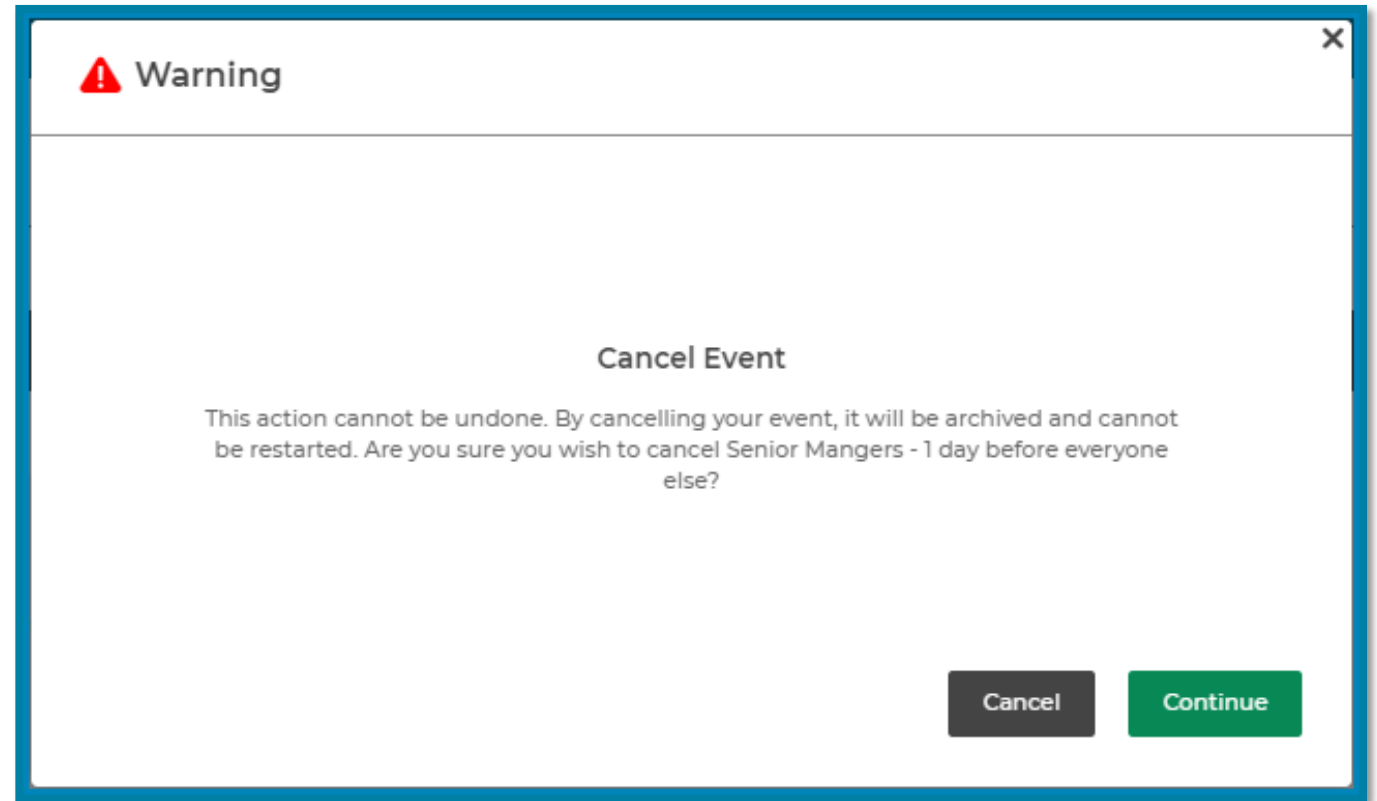
< > 1/1 25 12

<input type="checkbox"/>	FIRST NAME ▲	LAST NAME ▼	EMAIL ADDRESS ▼	SURVEY STATUS ▼
<input type="checkbox"/>	Betty	Davis	lapislazuli.AdamSandler@modernsurvey.com	Not Started
<input type="checkbox"/>	Bing	Crosby	lapislazuli.BingCrosby@modernsurvey.com	Not Started
<input checked="" type="checkbox"/>	Cameron	Diaz	lapislazuli.CameronDiaz@modernsurvey.com	In Progress
<input type="checkbox"/>	Chris	Pratt	lapislazuli.ChrisPratt@modernsurvey.com	Not Started

Cancel Event

Cancel event will close the survey for all the participants in this administration.

- When a participant clicks on the link in their invitation, the survey will display a message that the survey has been cancelled.



Re-Open Survey for an Event Administration

Re-Open allows you to open the survey back up for all the people in this administration.

- Enter in a new close date and time
- Click: Save Changes

Participants in the event will now be able to access the survey.


The link in the invitation email that was sent to them will now work.

Awareness: If users already have access to the reporting site, the existing data will change after the new survey close date.

Re-Open Survey

Instructions

Your survey will reopen when a close date is selected



[Clear Date](#)

Time Zone

CDT (GMT -05:00)

[Save Changes](#)