

Survey Administration

Managing a Live Survey Using a
Hierarchy in Org Manager

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 an Employee File and Hierarchies created in Org Manager.

Survey Admin

[Edit Survey](#)

Survey Name: 2022 Engagement
Program Type: Custom
Employee Data Source: Employee file (with hierarchies)

Survey Administration

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

Events

[Add New Audience](#)

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.

| NAME | OPEN DATE | CLOSE DATE | DISTRIBUTION | EMPLOYEES |
|---|-----------------------------|-----------------------------|-------------------------------|-----------|
| Generic Link | Immediately | Feb 28, 2030 at 12:00am CST | A single link you send | .. |
| All Other Regions | Mar 1, 2023 at 06:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | .. |
| Day 2 - North America | Mar 1, 2023 at 07:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | .. |
| 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 | .. |

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

Choose Your Source

- Choose Your Source
- Employee File (With Hierarchies) **Selected**
- Hierarchy Structure
- Other Source

[Save](#) [Save and GO to Next Step](#)

Steps

- Initial survey setup**
- Define survey content
Survey title, intro, and logo
Add questions
Manage Dimensions
- Design your survey
- Distribute your survey
- Setup survey reporting
- Confirm and schedule

[Previous](#) [Next](#)

Using 'Employee File (With Hierarchies)' in Step 1

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, the title 'Survey Admin' is shown next to an 'Edit Survey' button. Below this, survey details are listed: Survey Name (2022 Engagement), Program Type (Custom), and Employee Data Source (Employee file (with hierarchies)).

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

The 'Events' section contains 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 the notification is an 'Add New Audience' button and a table of events.

| NAME | OPEN DATE | CLOSE DATE | DISTRIBUTION | EMPLOYEES |
|---|-----------------------------|-----------------------------|-------------------------------|-----------|
| Generic Link | Immediately | Feb 28, 2030 at 12:00am CST | A single link you send | -- |
| All Other Regions | Mar 1, 2023 at 06:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | -- |
| Day 2 - North America | Mar 1, 2023 at 07:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | -- |
| 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 | -- |

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 |

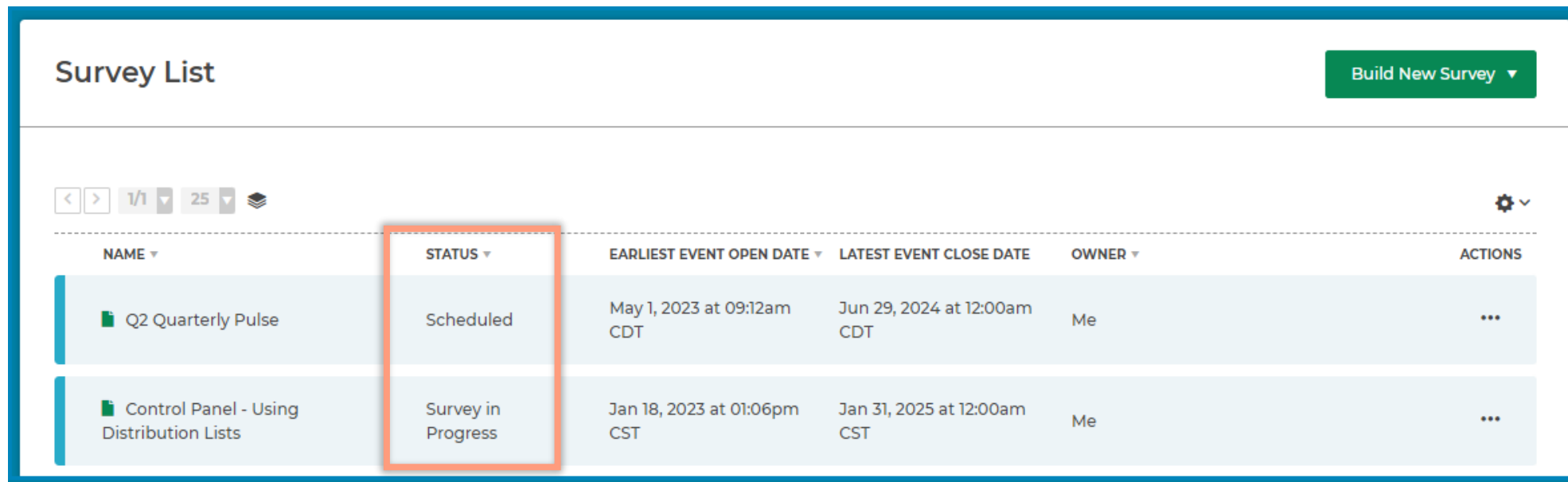
Below the table is a dark grey bar labeled 'Survey Administration'. Underneath this bar is a grid of nine light blue rectangular buttons with dark blue corner accents. The buttons are arranged in three rows and three columns:

- 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.

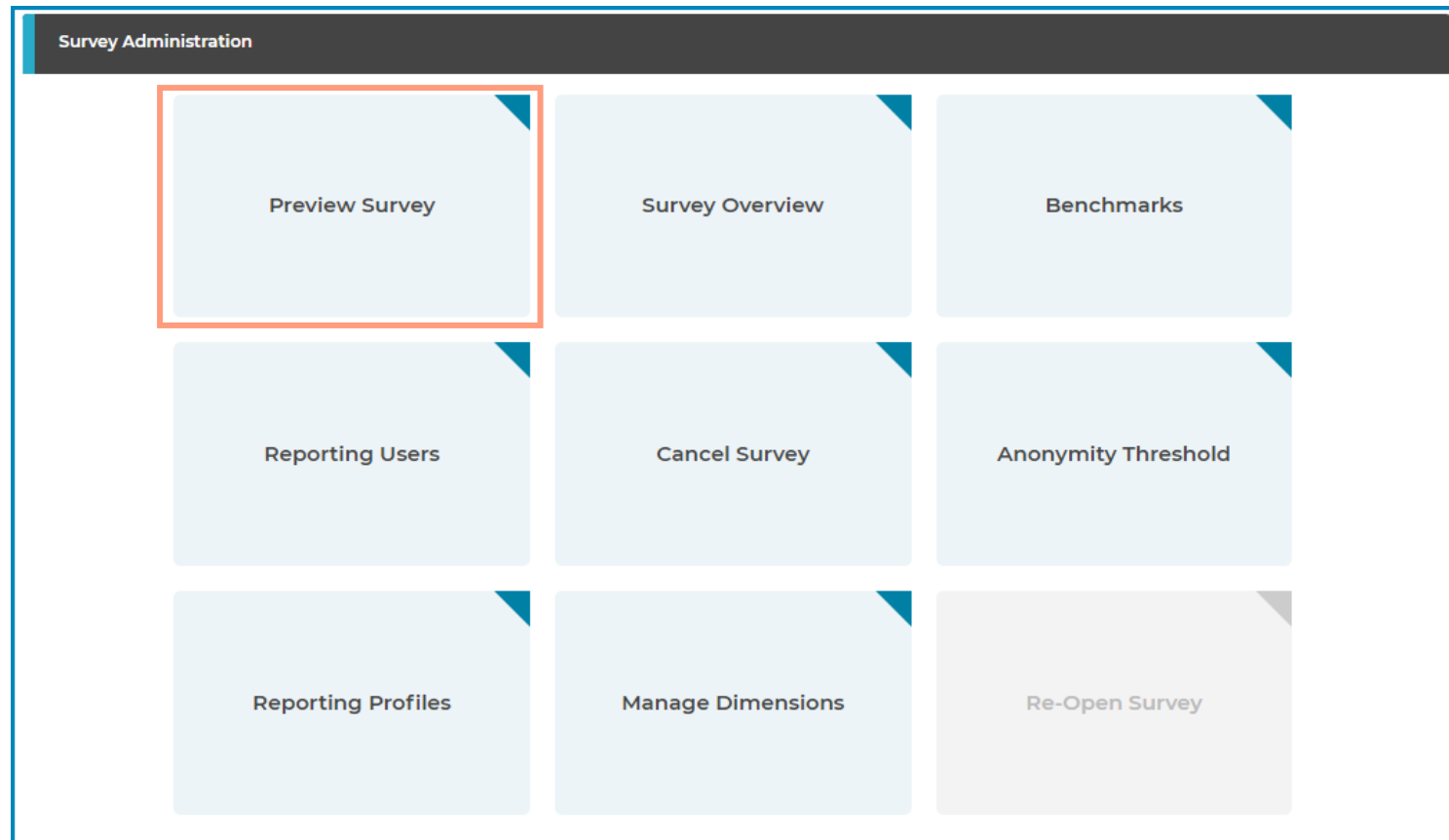
The screenshot displays the 'Edit Survey' interface in the KINCENTRIC system. At the top, there is a 'Live Survey' warning banner. Below it, the 'Survey Title' is set to 'Q2 Quarterly Pulse'. The 'Survey Intro' section contains a rich text editor with a warning about survey changes. The 'Survey Definitions' section has a toggle switch turned on. The 'Page Description' section also features a rich text editor. A table of definitions is visible, listing terms like 'Direct Leader', 'Group Leader', 'Supervisor', 'Company', and 'Site' with their respective definitions. At the bottom, a table of survey questions is shown, with columns for 'QUESTION ID', 'QUESTION', 'RESPONSE REQUIRED', and 'TRANSLATIONS'. The 'RESPONSE REQUIRED' column contains toggle switches for each question.

| 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"/> |
| EN007 | 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.

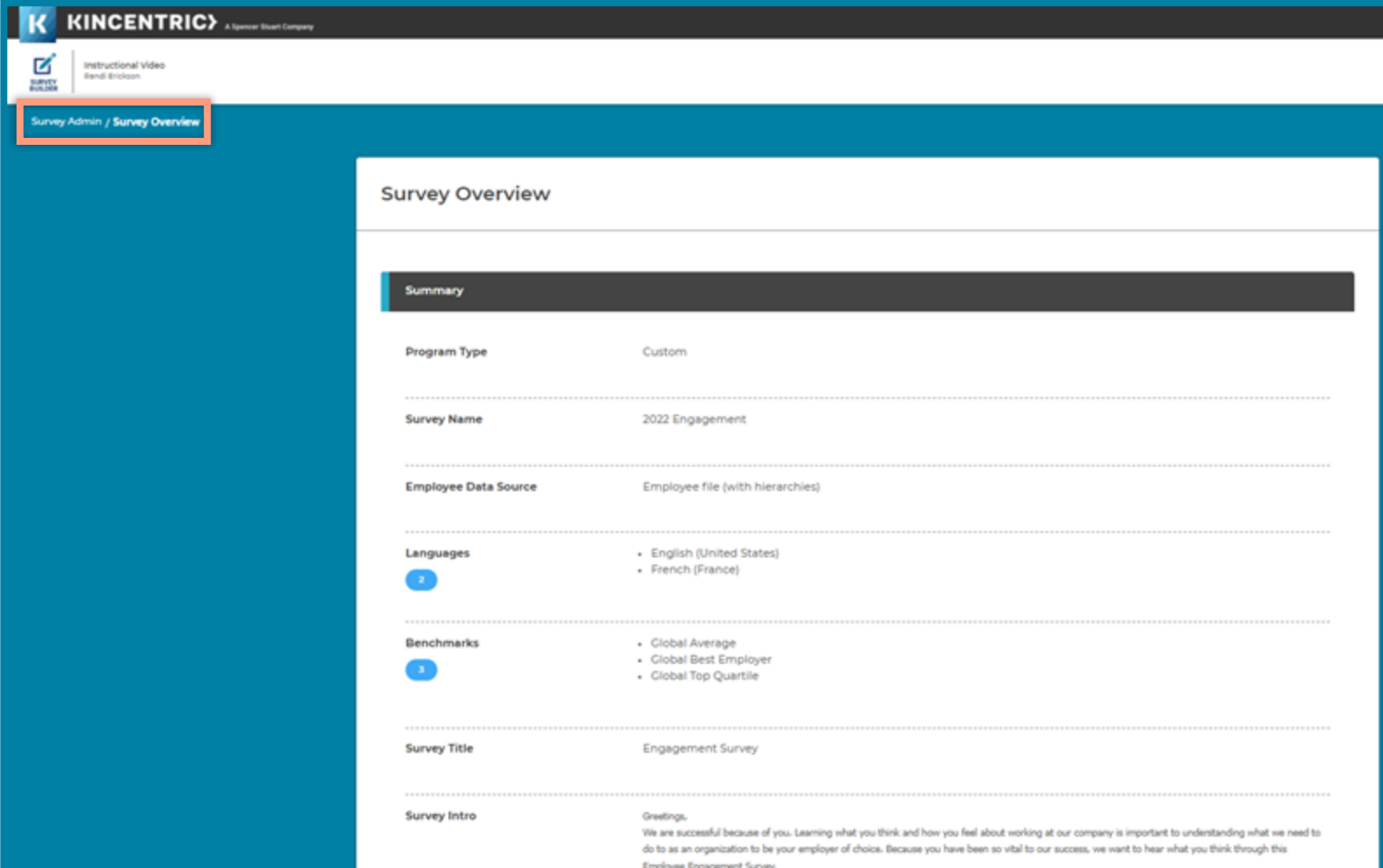
- Survey responses are not recorded when you view the survey through the preview survey option.
- If a survey is in progress, you will not have the option to add, delete or change the survey since this would impact existing responses.



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.
- Access & Profiles from Org Manager
 - Edit the data scope.
 - Add new profiles.
 - To create new profiles, first go to Org Manager to create the new profiles then add them here.

Reporting Users

Reporting Users - Individually

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

The screenshot displays the 'Reporting Users' interface. At the top, there's a header 'Reporting Users' and a sub-header 'Reporting Users - Individually' with a '2' in a blue circle. Below this is a table with columns 'FIRST NAME', 'LAST NAME', and 'EMAIL'. One user is listed: Tom Hanks, with email lapolisazuli.TomHanks@modernsurvey.com. Below the table are input fields for 'First Name', 'Last Name', and 'Email', along with a trash icon. A modal window titled 'Add Reporting Users' is open, showing options for group access hierarchy (Manager Hierarchy), profile selection, and data scope. The modal has a search table with 'Jude Law / Company Overall (Access: Jude Law)' selected. Below the search table are options for 'Unparented' and 'Selected Hierarchy Nodes'. At the bottom of the modal, there's a 'Select data scope' dropdown with options: 'Their group only' (checked), 'Their group and all below', 'Their rollups only', and 'Their rollups and all below'. There are 'Cancel' and 'Add Access' buttons. A 'Save Changes' button is visible at the bottom of the main interface. A blue callout box points to the '+ Add Users' button with the text 'Add Profiles'. Another blue callout box points to the 'Edit' button in the 'ACTIONS' column of the 'PROFILES' table with the text 'Change Data Scope'. The 'PROFILES' table has columns 'PROFILES', 'DATA SCOPE', and 'ACTIONS'. It lists 'Day 1 - Sr. Managers' with data scope 'Their rollups and all below' and 'Day 5 - Everyone Else' with data scope 'Their group and all below'. The 'ACTIONS' column has an 'Edit' button and a three-dot menu icon.

Reporting Users

Add Profiles from Org Manager

1. Go to Org Manager and create a new profile
2. Return to Survey Builder/Reporting Users Tile and click Add Users
3. Select the new profile and scope
4. Click: Add Access

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 dataset. Invite emails will be sent to the user upon survey close.

| FIRST NAME | LAST NAME | EMAIL |
|----------------------|----------------------|---------------------------------------|
| Tom | Hanks | lapislazuli.TomHanks@modernsurvey.com |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Reporting Users - Bulk 28

Give reporting access using a hierarchy's group access and profiles. Group access

| HIERARCHY | REPORTING USERS | PROFILES | ACTIONS |
|-------------------|-----------------|---|---------|
| Manager Hierarchy | 6 | Day 1 - Sr. Managers Their rollups and all below | Edit |
| Manager Hierarchy | 22 | Day 5 - Everyone Else Their group and all below | ... |

Add Profiles

Add Reporting Users

I want individuals with group access in this hierarchy

and to have the profile of

Select the Profile

Search Table

Jude Law / Company Overall (access: Jude Law)

Unparented

Selected Hierarchy Nodes

to have the survey results (scope) of

Their group only

Their group and all below

Their rollups only

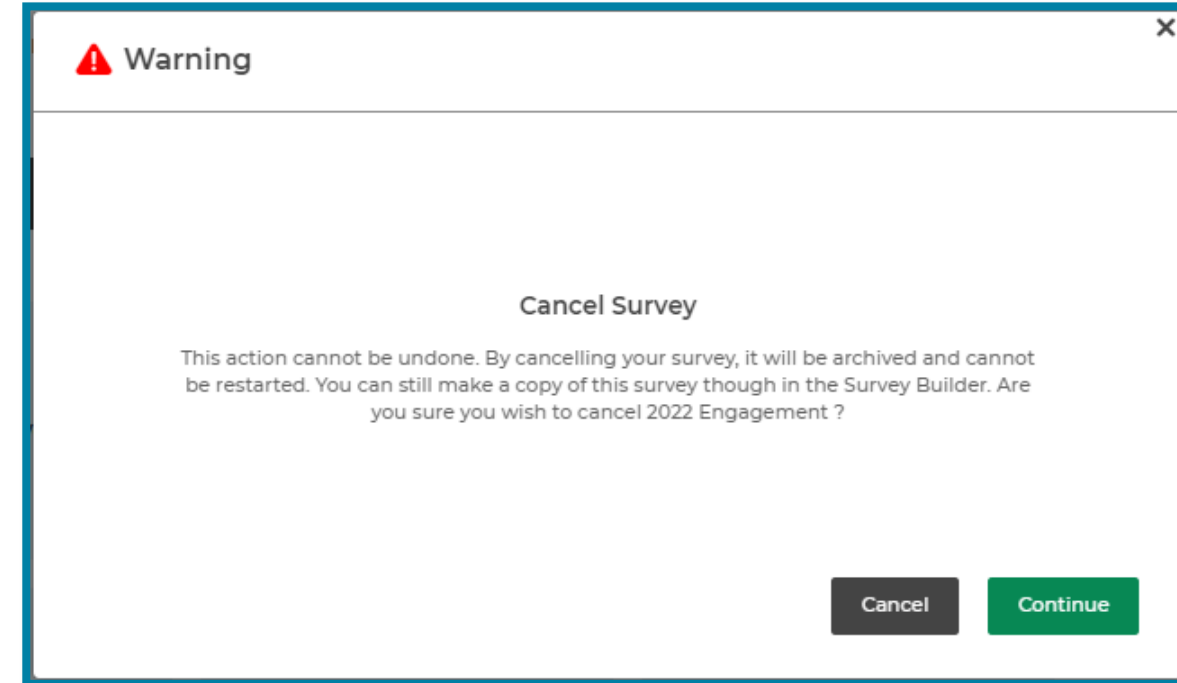
Their rollups and all below

Select the Scope

Cancel Survey

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

- This feature will immediately cancel a survey for all participants
- 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

Reporting Profiles

The Reporting Profiles page lets you edit the reporting go live date which is also the date the invitation email is sent.

- You will only have this tile if you used the Access & Profiles feature in Org Manager.

1. Click the Actions icon
2. Select: Edit reporting site go live date, invite email
3. Select a new date/time
4. Click Save And Close

The screenshot displays the 'Reporting Profiles' page. At the top, there is a section titled 'Reporting Site User Profiles' with instructions: 'Every reporting site user must be assigned a profile. Profiles are used to control when the invite email is sent out, filters and segments users have access to, and more. Note: You can edit these choices later.' Below this is a table with columns: PROFILE NAME, REPORTING USERS, REPORTING SITE GO LIVE DATE, REPORTING FILTERS / SEGMENTS, DEFAULT HIERARCHY, and ACTIONS. Two rows are visible, both with a '0' in the 'REPORTING SITE GO LIVE DATE' column. The 'ACTIONS' column for the first row has a hand icon, and a tooltip above it says 'Edit reporting site go live date, invite email'. A modal window titled 'Edit Go Live Date, Invite Email' is open in the foreground. It contains a 'Go Live Date' section with a toggle for 'Immediately upon survey close' (which is currently off), a date input field showing 'Mar 31, 2023 at 12:00am', and a 'Clear Date' link. The 'Time Zone' is set to 'CDT (GMT -05:00)'. At the bottom of the modal are 'Cancel', 'Save', and 'Save And Close' buttons.

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

| <input type="checkbox"/> | 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

0

--

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.

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

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.

Create another event

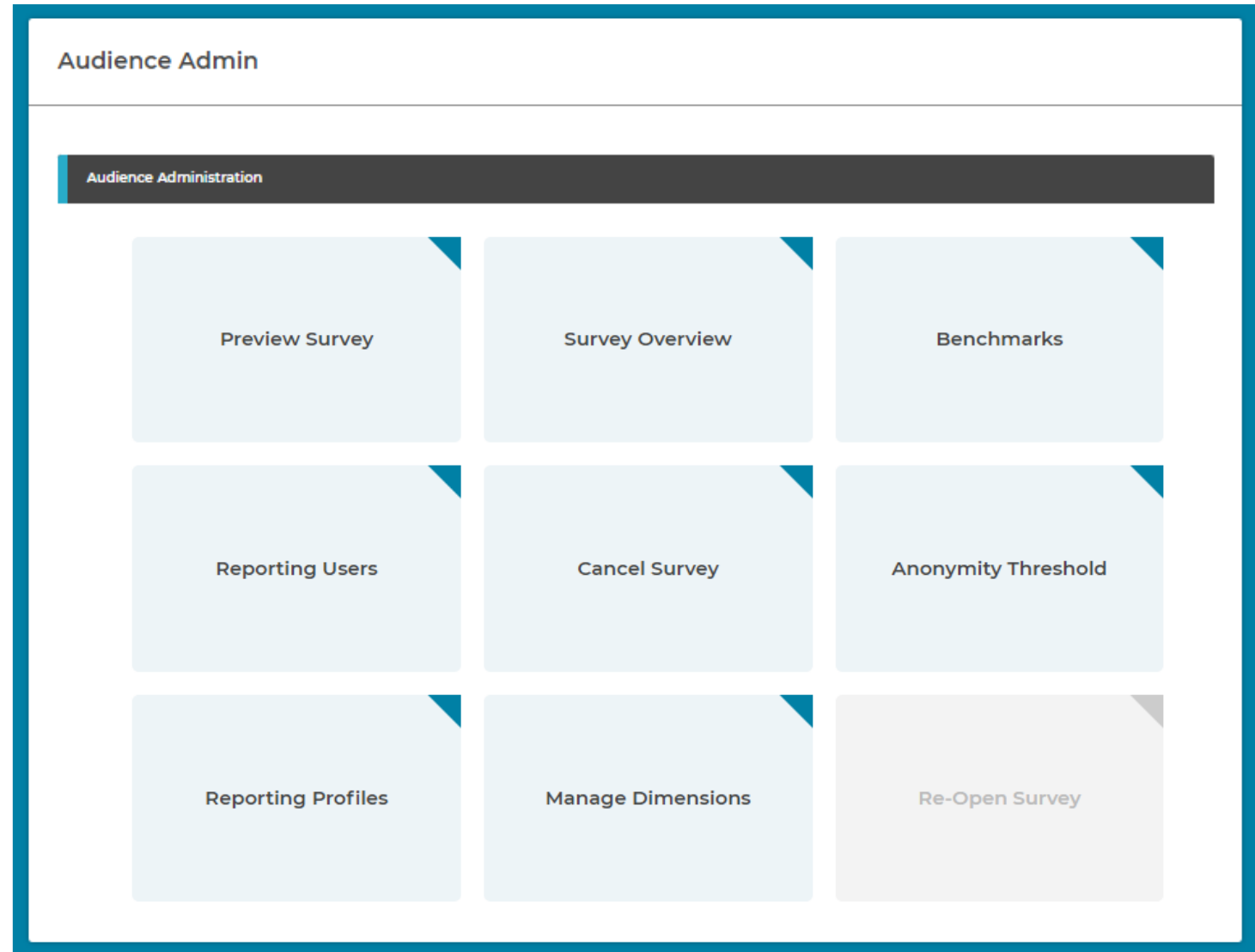
Add New Audience

| NAME | OPEN DATE | CLOSE DATE | DISTRIBUTION | EMPLOYEES |
|---|-----------------------------|-----------------------------|-------------------------------|-----------|
| Generic Link | Immediately | Feb 28, 2030 at 12:00am CST | A single link you send | -- |
| All Other Regions | Mar 1, 2023 at 06:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | -- |
| Day 2 - North America | Mar 1, 2023 at 07:00am CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | -- |
| 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 | -- |

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 is a grid of nine tiles, each representing a different management function. The tiles are arranged in three rows and three columns. The first row contains 'Preview Survey', 'Survey Overview', and 'Benchmarks'. The second row contains 'Reporting Users', 'Cancel Survey', and 'Anonymity Threshold'. The third row contains 'Reporting Profiles', 'Manage Dimensions', and 'Re-Open Survey'. The 'Re-Open Survey' tile is highlighted with a grey background, while the others are light blue.

| Audience Administration | | |
|-------------------------|-------------------|---------------------|
| Preview Survey | Survey Overview | Benchmarks |
| Reporting Users | Cancel Survey | Anonymity Threshold |
| Reporting Profiles | Manage Dimensions | Re-Open Survey |


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.

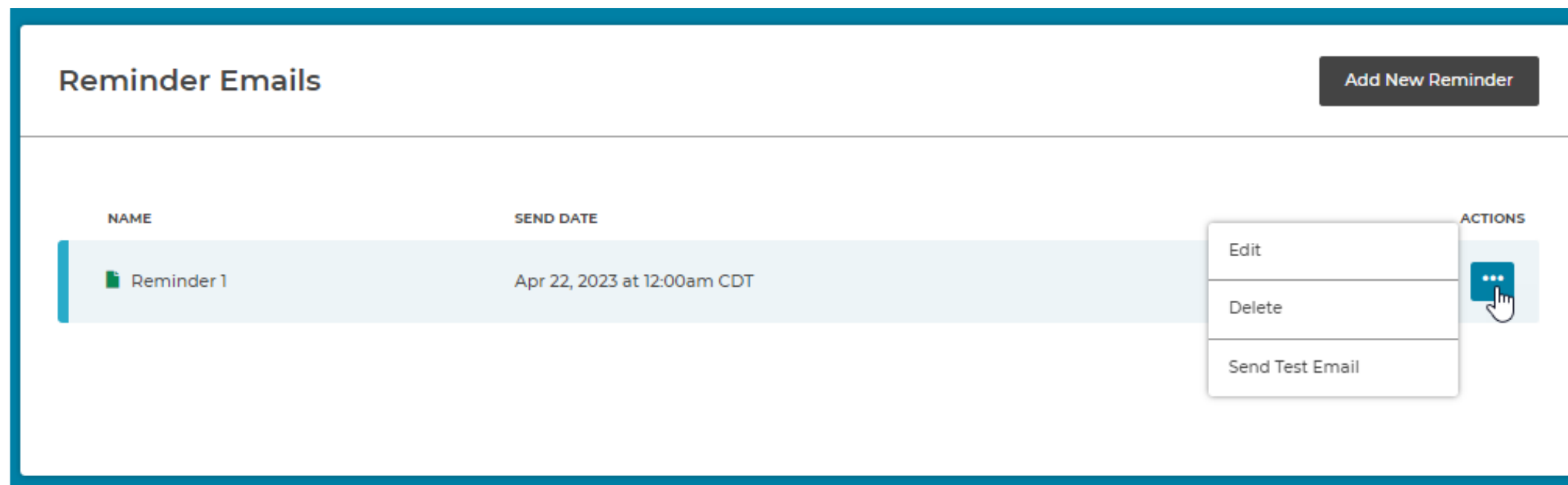
Kincentric will process the data and report the results to us, and we will share the results and our follow-up action plans with you. We will use the results to help us focus our efforts on things that make a difference to you.

| 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:

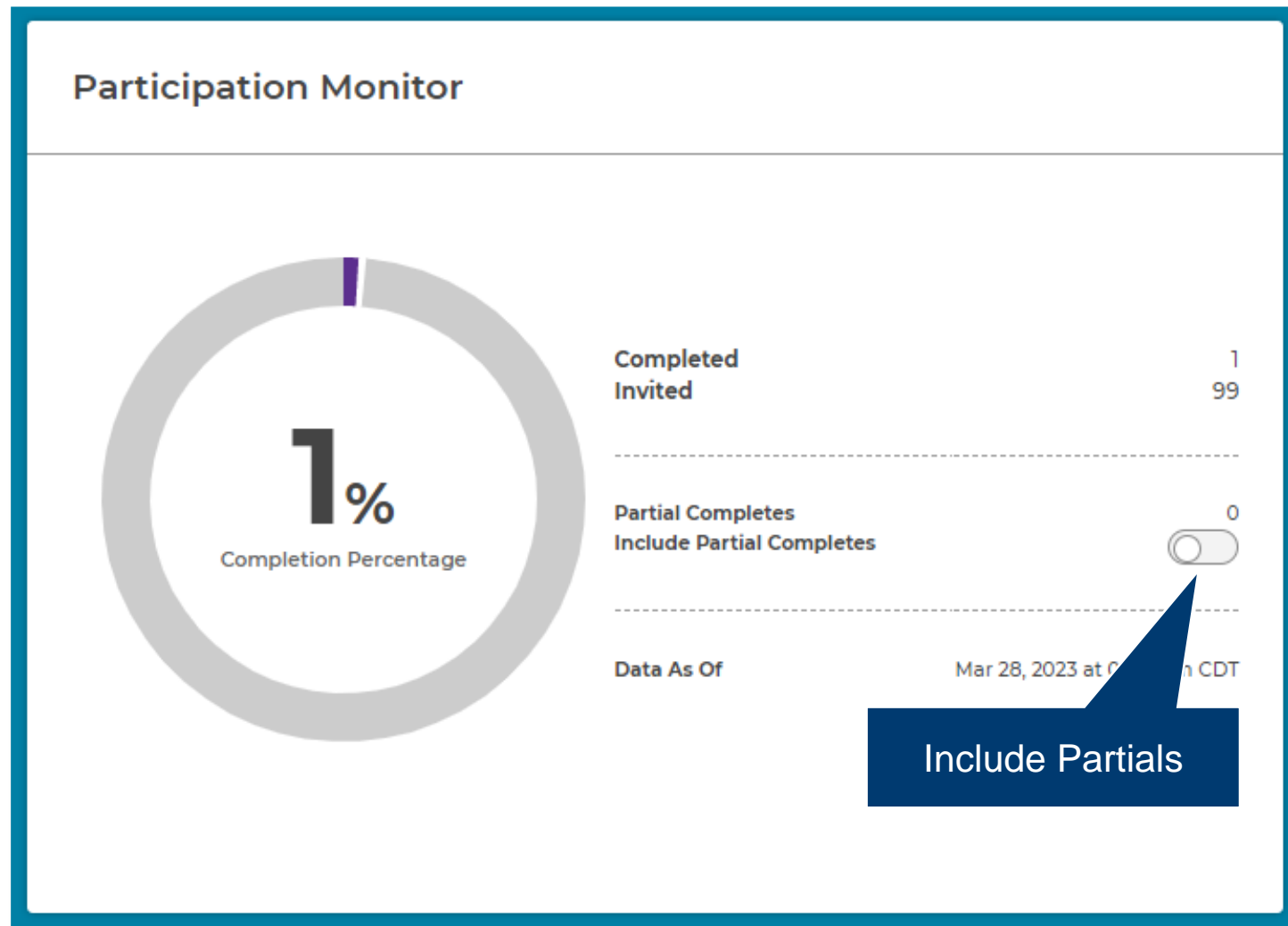
| NAME | SEND DATE | ACTIONS |
|--|-----------------------------|---|
|  Reminder 1 | Apr 22, 2023 at 12:00am CDT | <ul style="list-style-type: none">EditDeleteSend Test Email |

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 Distribution List tile provides you with a list view of all the participants in the audience.

- Use the search feature to look for employees.
- The employees in this list are managed in Org Manager. This view is for reference only, no actions can be performed from this screen

Distribution List

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.

< > 1/1 25 12

Columns (4) Betty

Show duplicate email addresses

| FIRST NAME ▲ | LAST NAME ▼ | EMAIL ADDRESS ▼ |
|--------------|-------------|---|
| Betty | Davis | lapislazuli.AdamSandler@modernsurvey.com |
| Bing | Crosby | lapislazuli.BingCrosby@modernsurvey.com |
| Cameron | Diaz | lapislazuli.CameronDiaz1@modernsurvey.com |

Hierarchy View

The Hierarchy View allows you to see and download your audience in a hierarchy format.

- Since all changes to the distribution are made in Org Manager, the information is read only.
- Search for an employee to find the node they are in.
- Download the full list of employees including email address into Excel.
- Find duplicate employees
- For more information on how to add, delete or modify participants during a survey please watch the [Employee File with Hierarchies](#) video.

The screenshot shows the 'Hierarchy View' interface. At the top right, there is a 'Download Name/Email List' button. Below it, a dark warning banner reads: '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. Click [here](#) to view the entries with duplicate email address.' A callout box labeled 'Find Duplicates' points to the 'here' link. Below the warning is a search bar labeled 'Search Table' with a magnifying glass icon. Underneath the search bar is a dropdown menu showing 'Jude Law / Company Overall'. Below the dropdown is the text 'Unparented'. The main content area is titled 'Selected Hierarchy Nodes' and contains a list of nodes with counts: 'Selected Node Count 6', 'Harrison Ford / Finance 1', 'Chris Pratt / HR 1', 'Tom Hardy / Information Technology 1', 'Matt Damon / Quality 1', 'Mel Gibson / Sales and Distribution 1', and 'Lady Gaga / Training and Development 1'. A callout box labeled 'Export to Excel' points to the top right area of the interface.

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

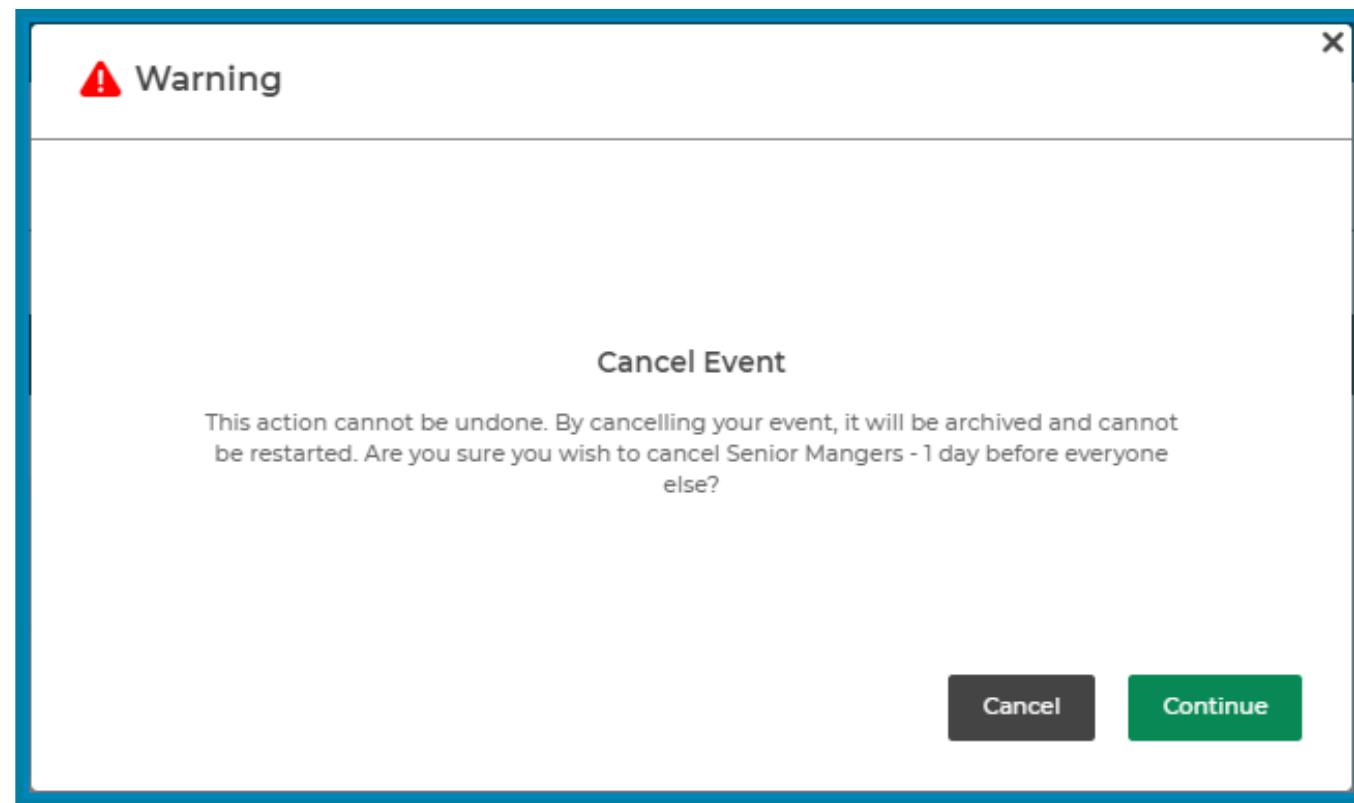
< > 1/1 25 12

| <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](#)