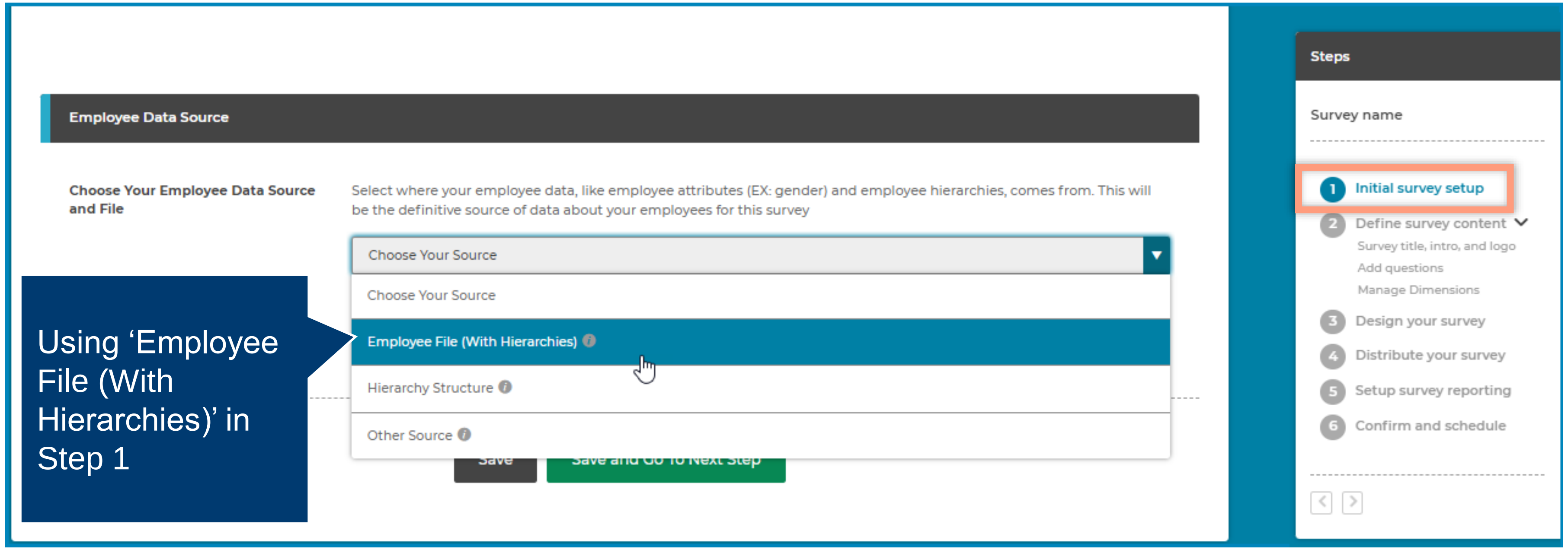
KINCENTRIC A Spencer Stuart Company

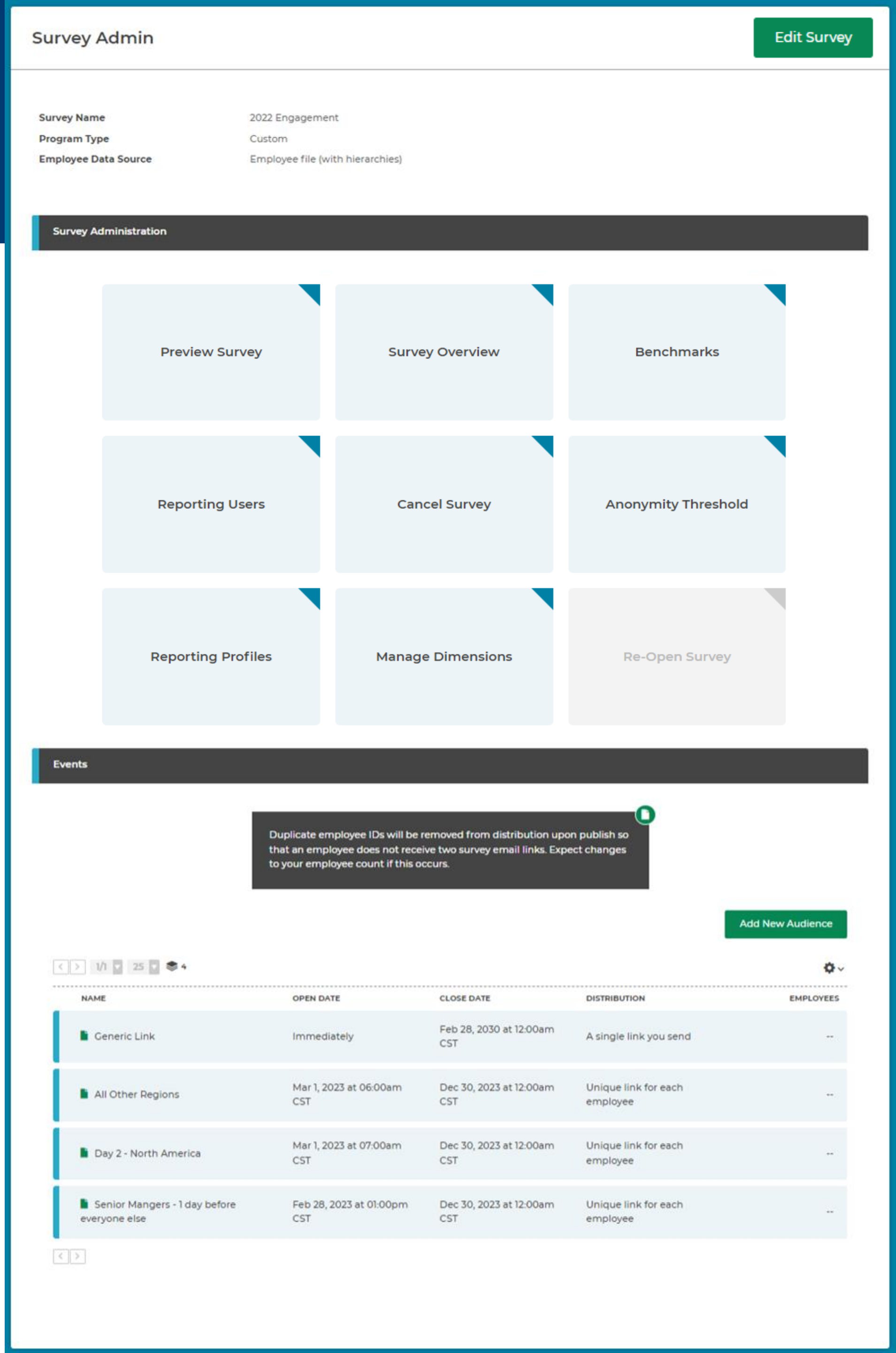
# Survey Administration

## 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.



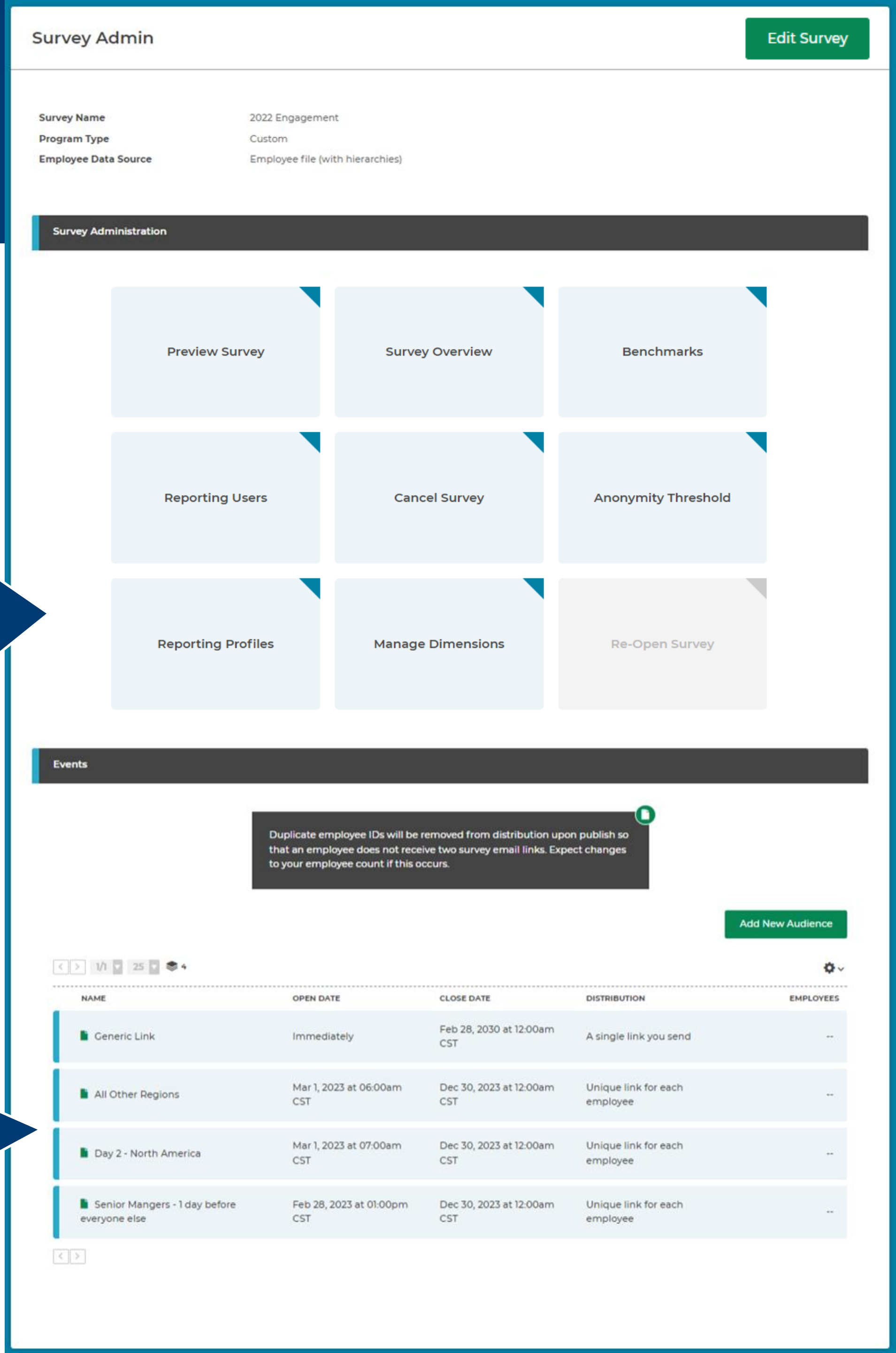
# Survey Admin Page

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.

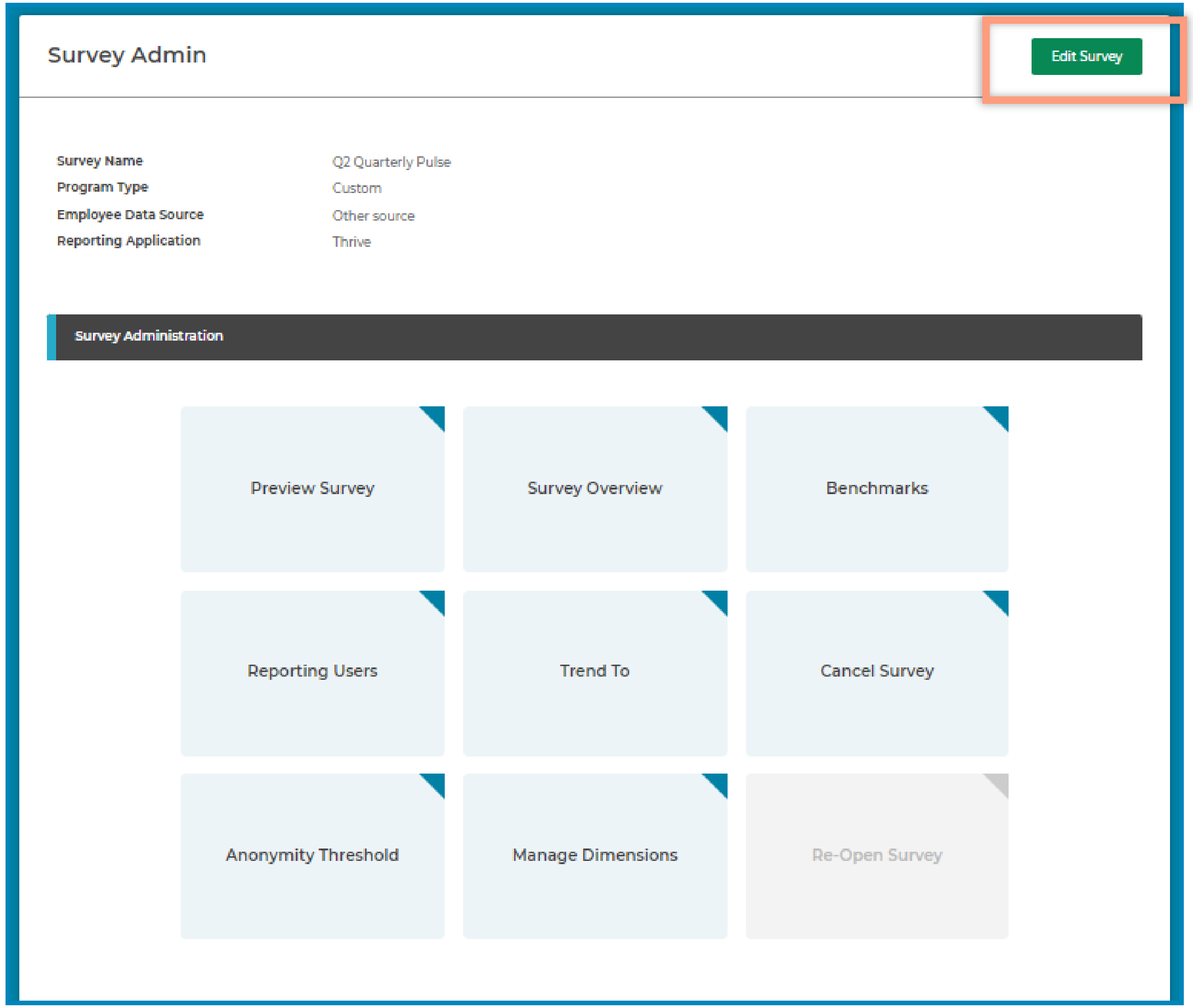
The Events section contains each audience you created and tiles specific to manage them.



# Edit Survey

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

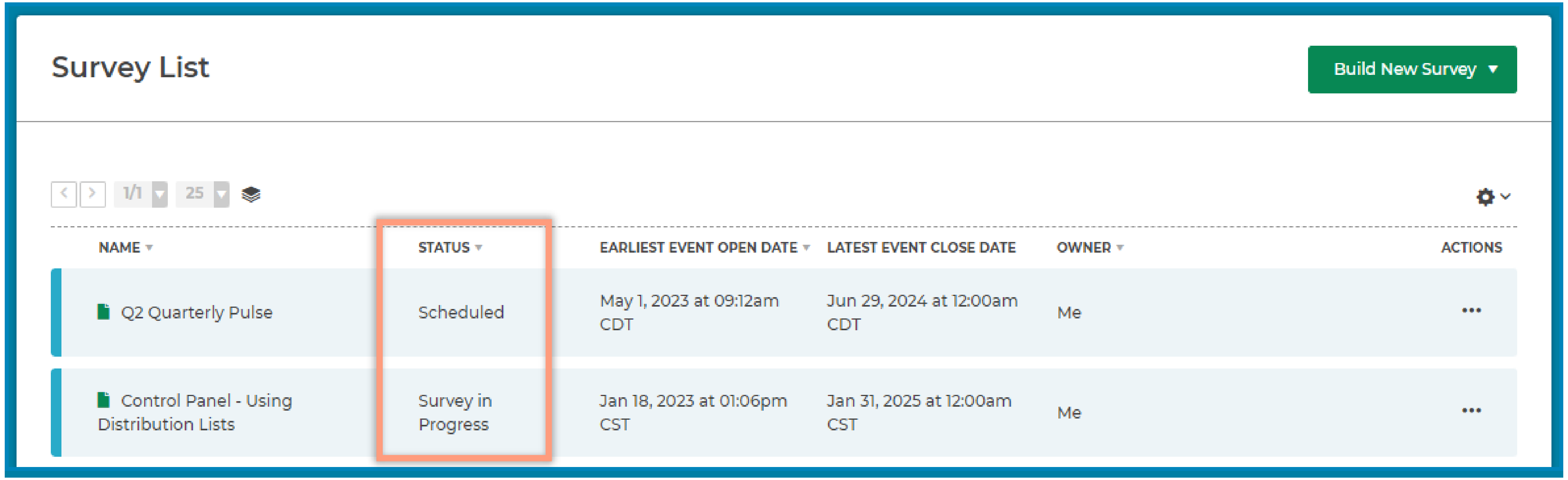
- Survey Title & Translations
- Survey Intro & Translations
- Survey Definitions & Translations
- Response Required Option
- Question Text & Translations
  - Use this feature with caution. It should primarily be used to correct typos or small spelling/translation changes.
  - Changing the entire wording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



# 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’

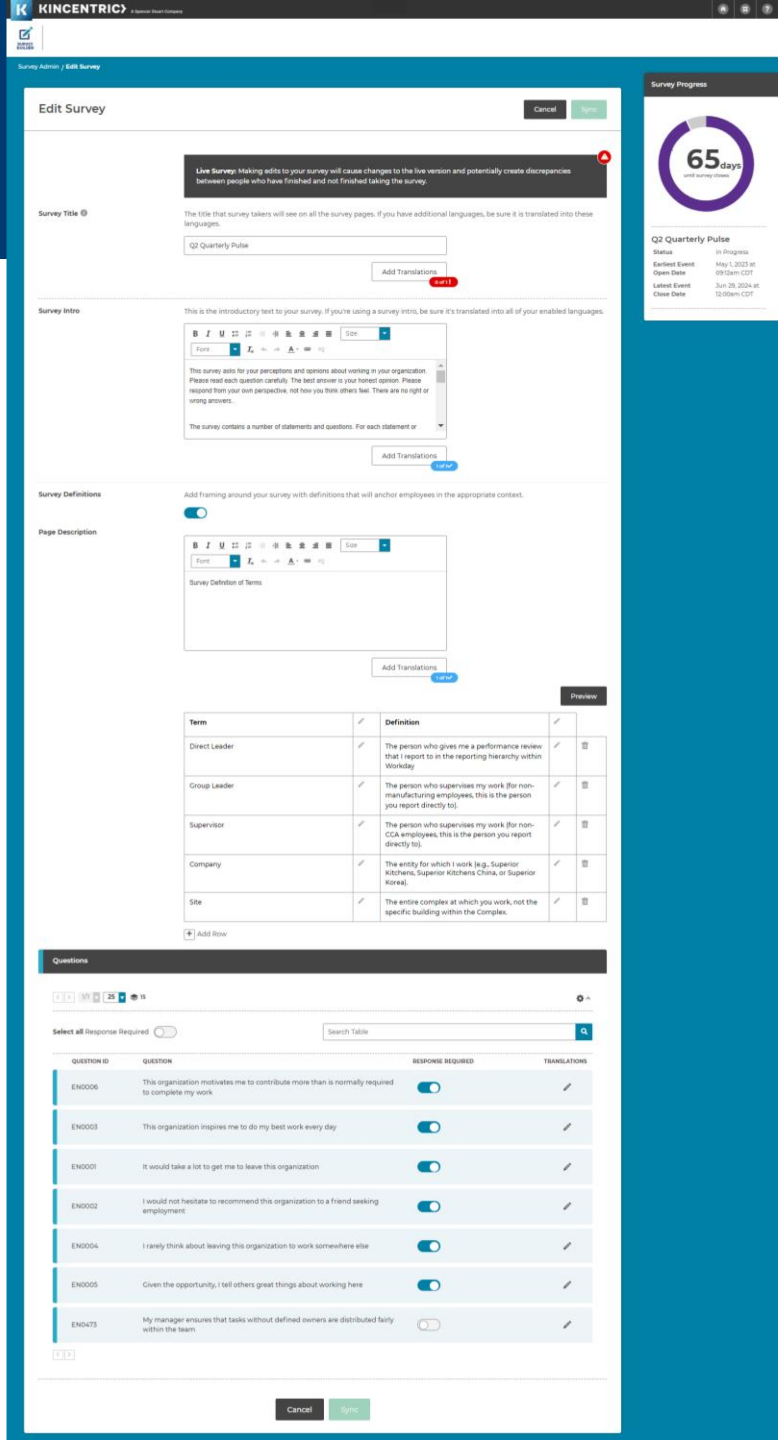


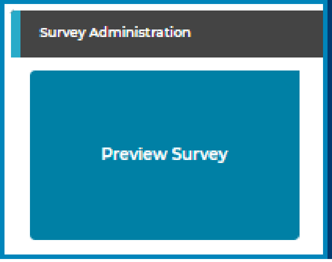
# Edit Survey

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.

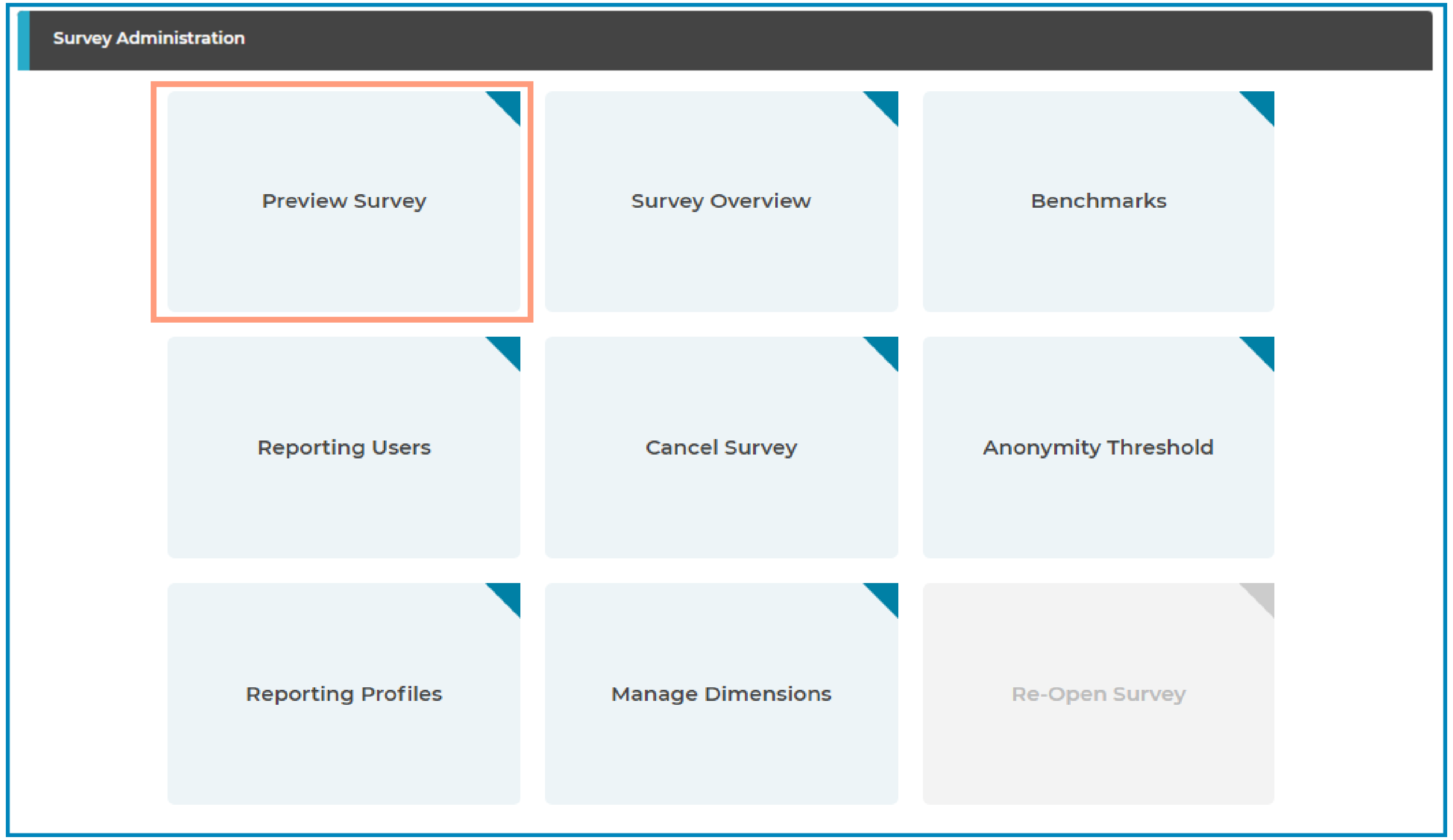





# Preview Survey

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.



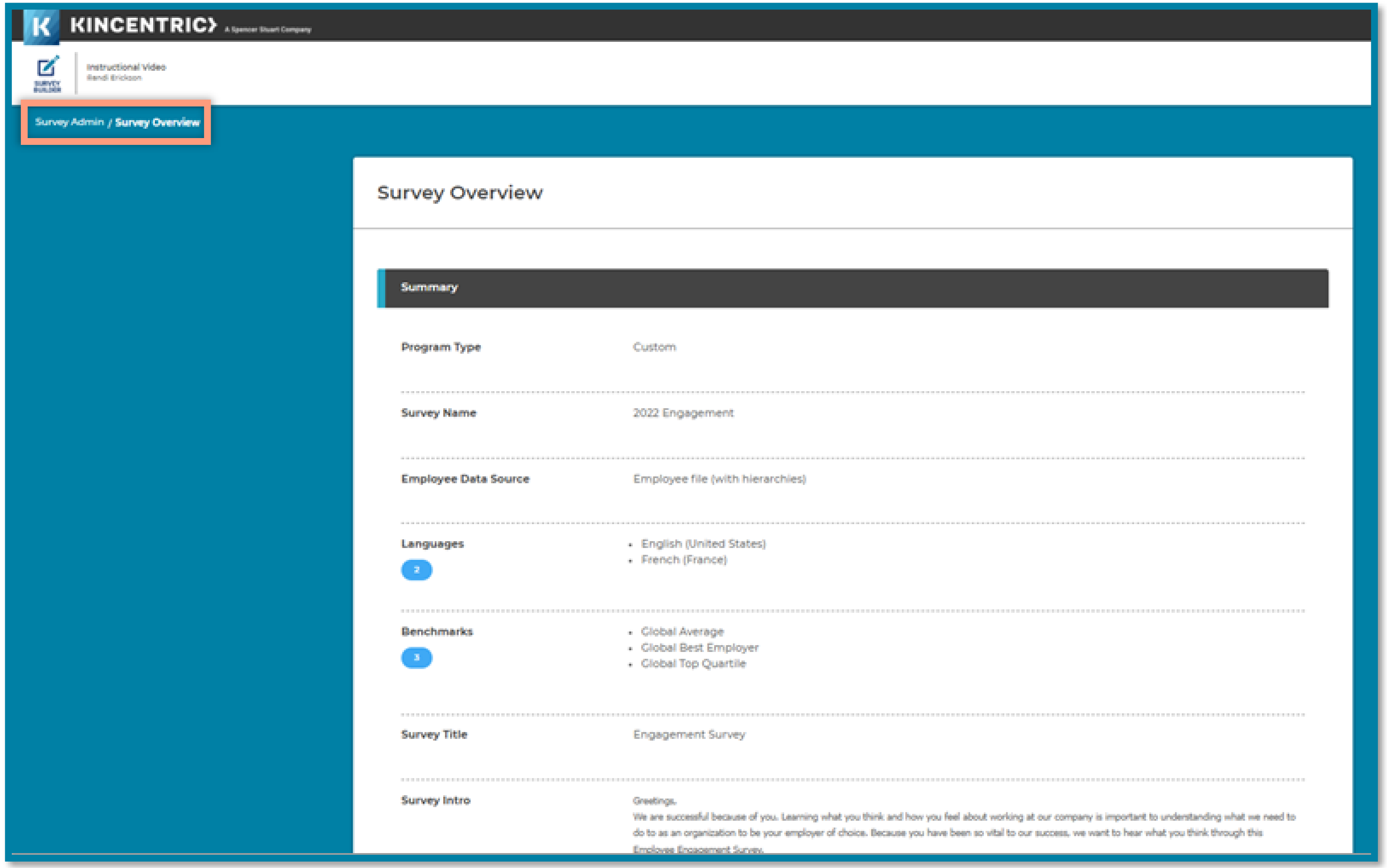
Survey Administration

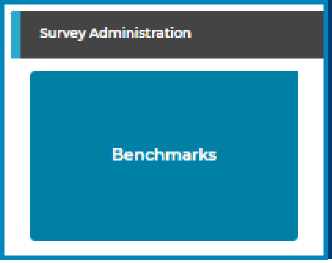
Survey Overview

# 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.

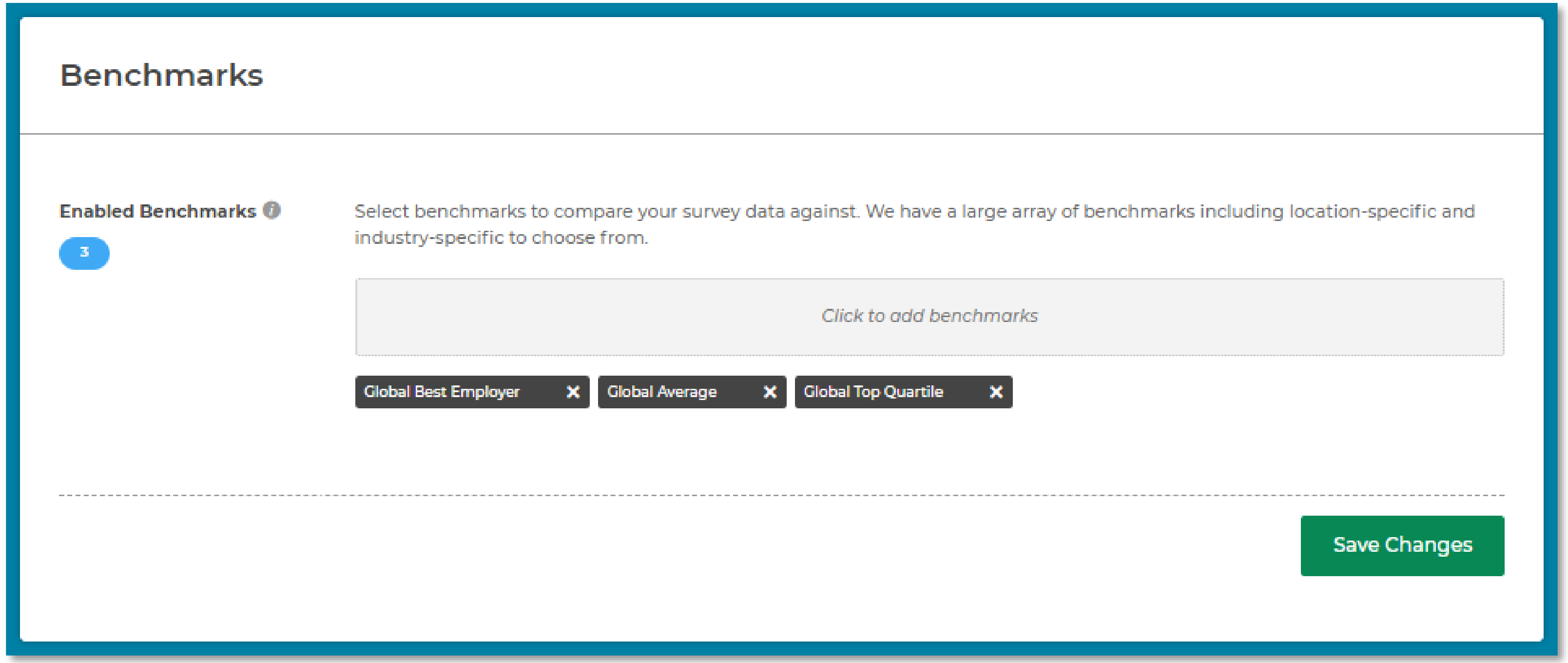


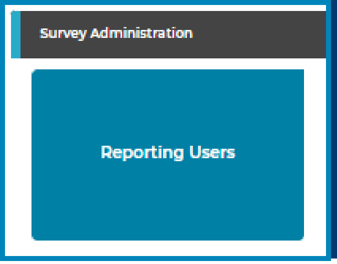



# Benchmarks

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.

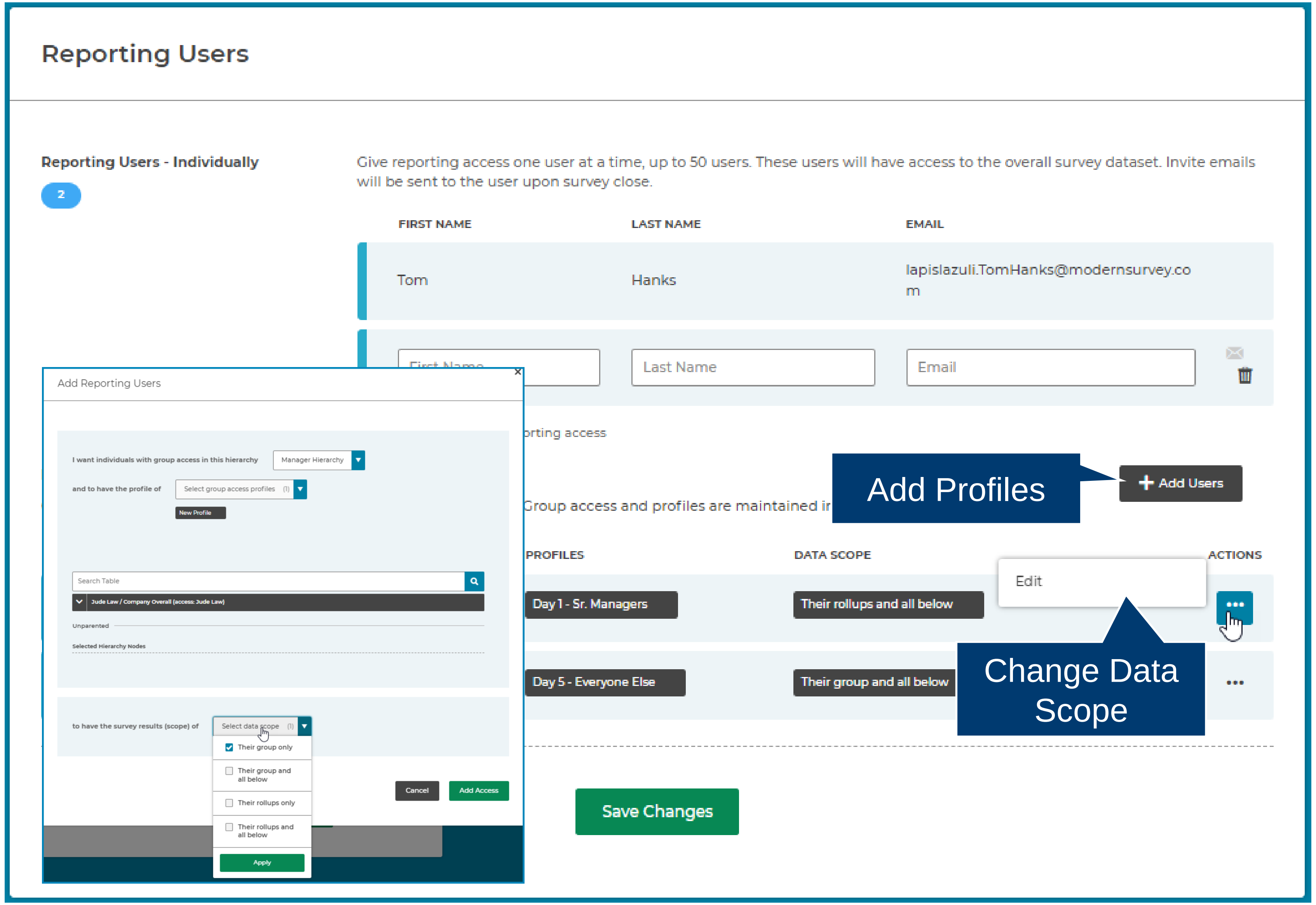


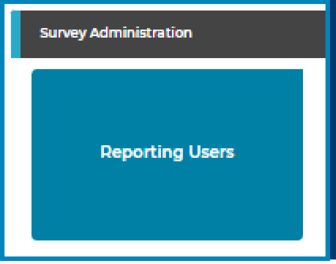



# Reporting Users

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.

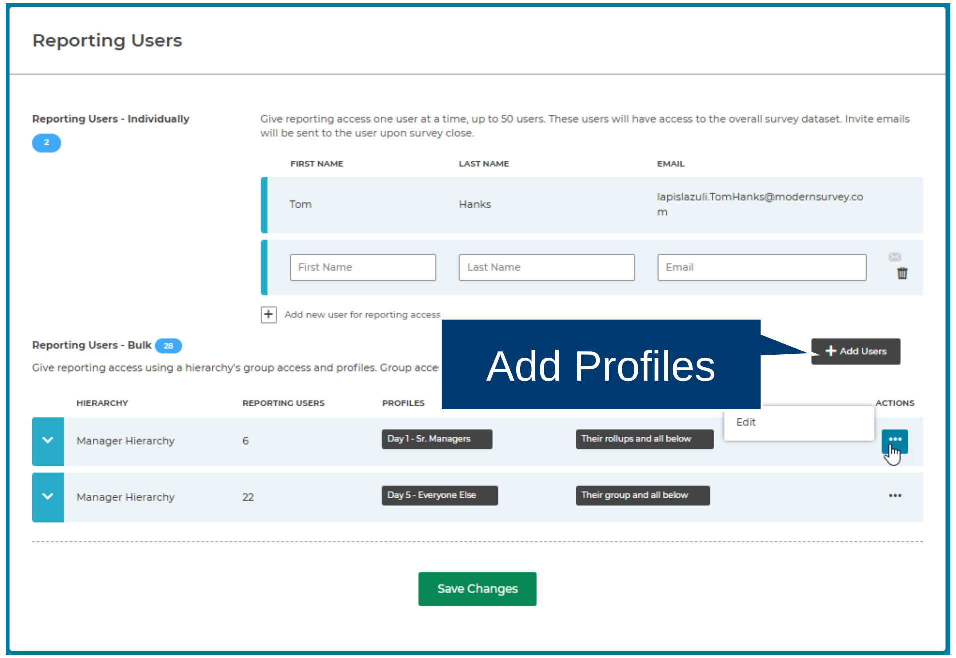


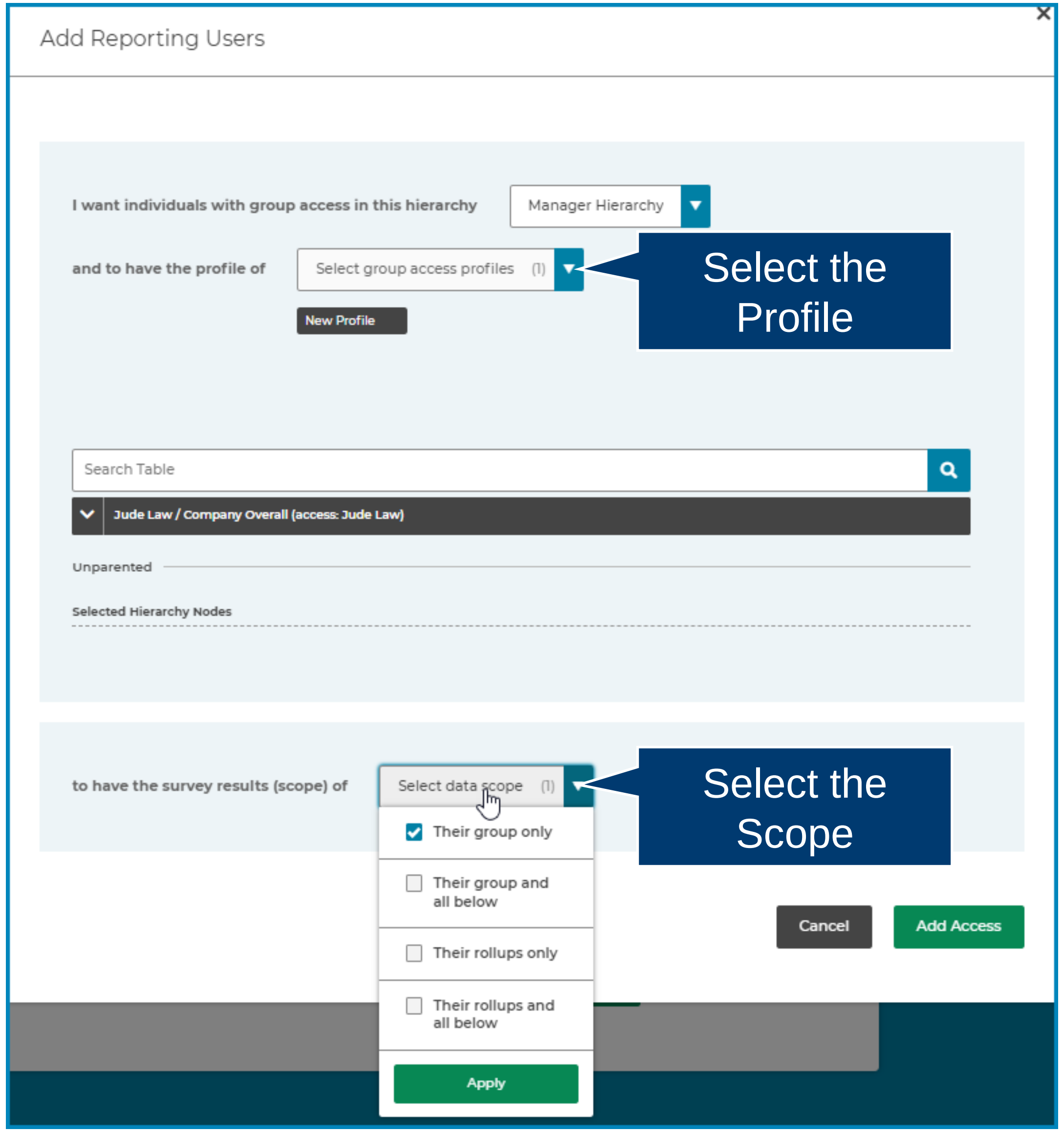


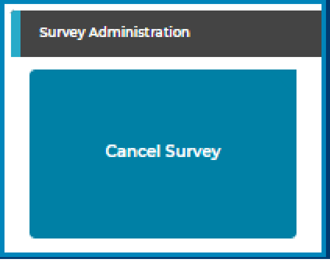

# Reporting Users

## 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



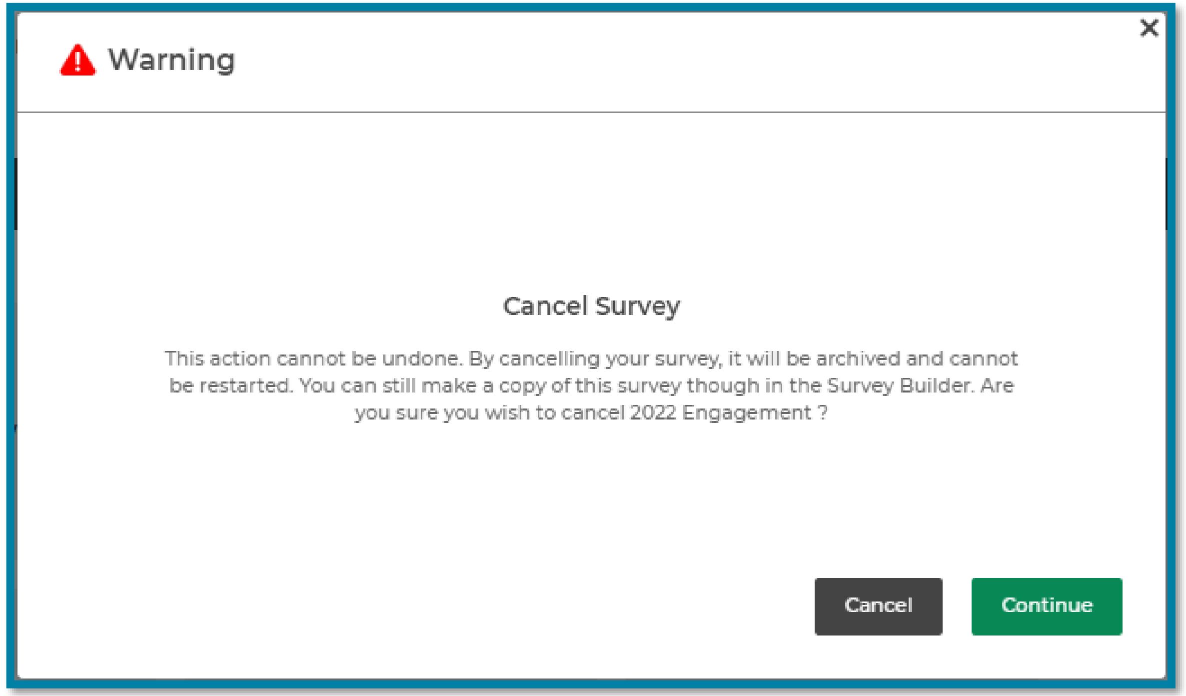



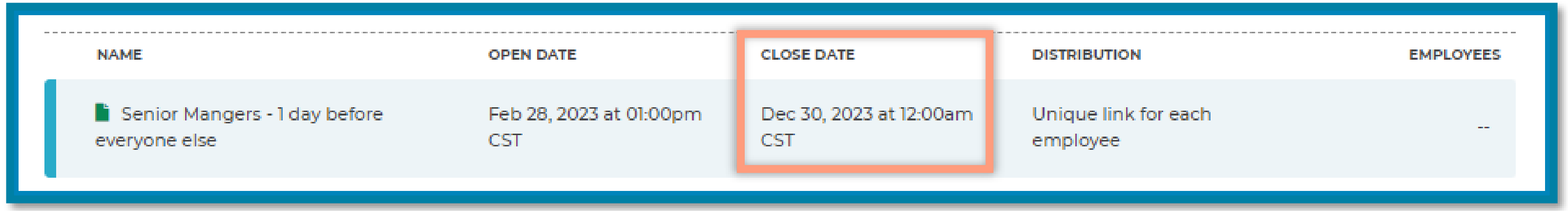



# Cancel Survey

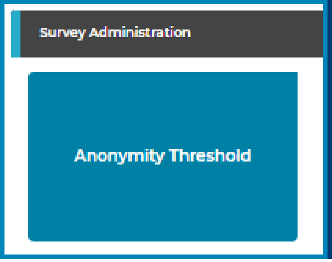
Cancel Survey allows you to cancel a survey while it is in progress.

- 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.



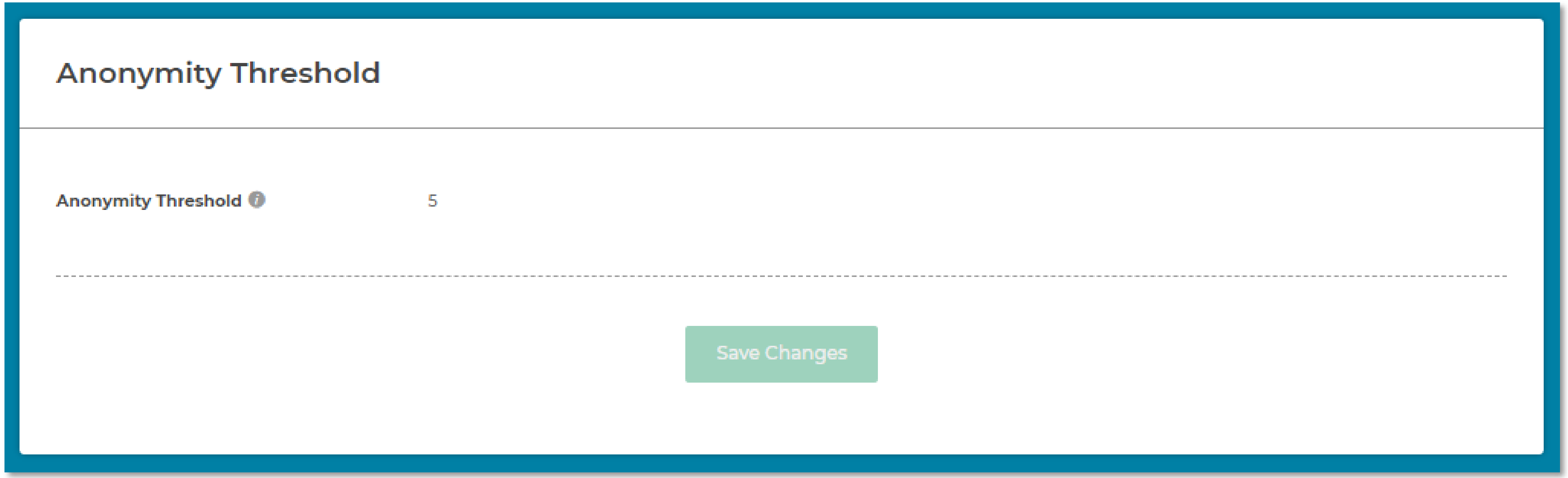
| NAME | OPEN DATE | CLOSE DATE | DISTRIBUTION | EMPLOYEES |
|---|---|---|---|---|
| Senior Mangers - 1 day before everyone else | Feb 28, 2023 at 01:00pm CST | Dec 30, 2023 at 12:00am CST | Unique link for each employee | -- |




# Anonymity Threshold

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

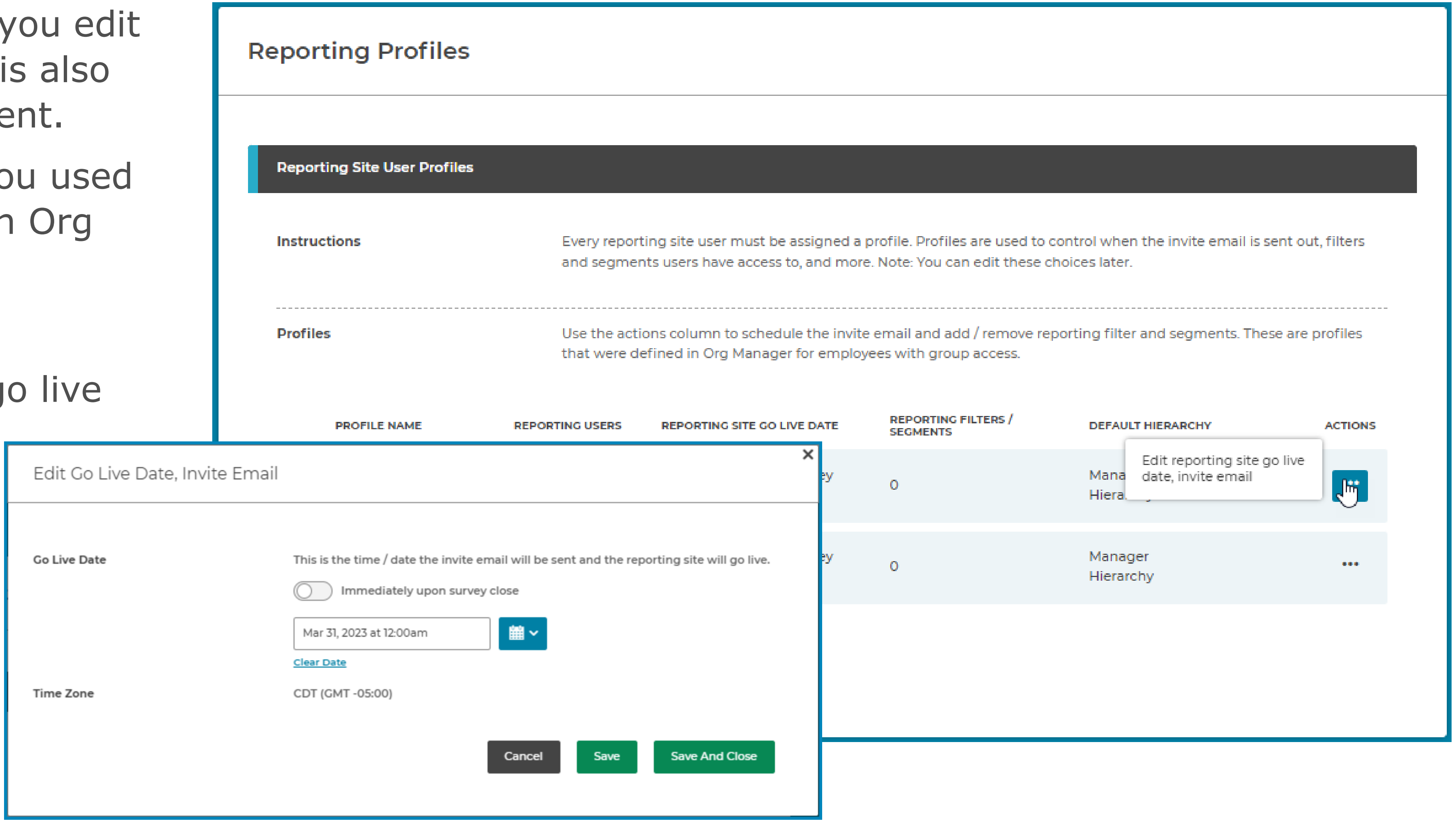
- This is for viewing purposes only.
- If you need this changed, please reach out to your Kincentric project team.

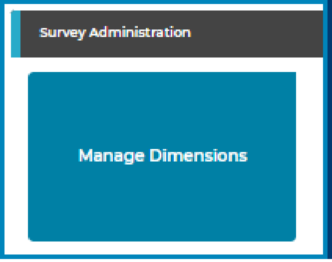


# Reporting Profiles

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

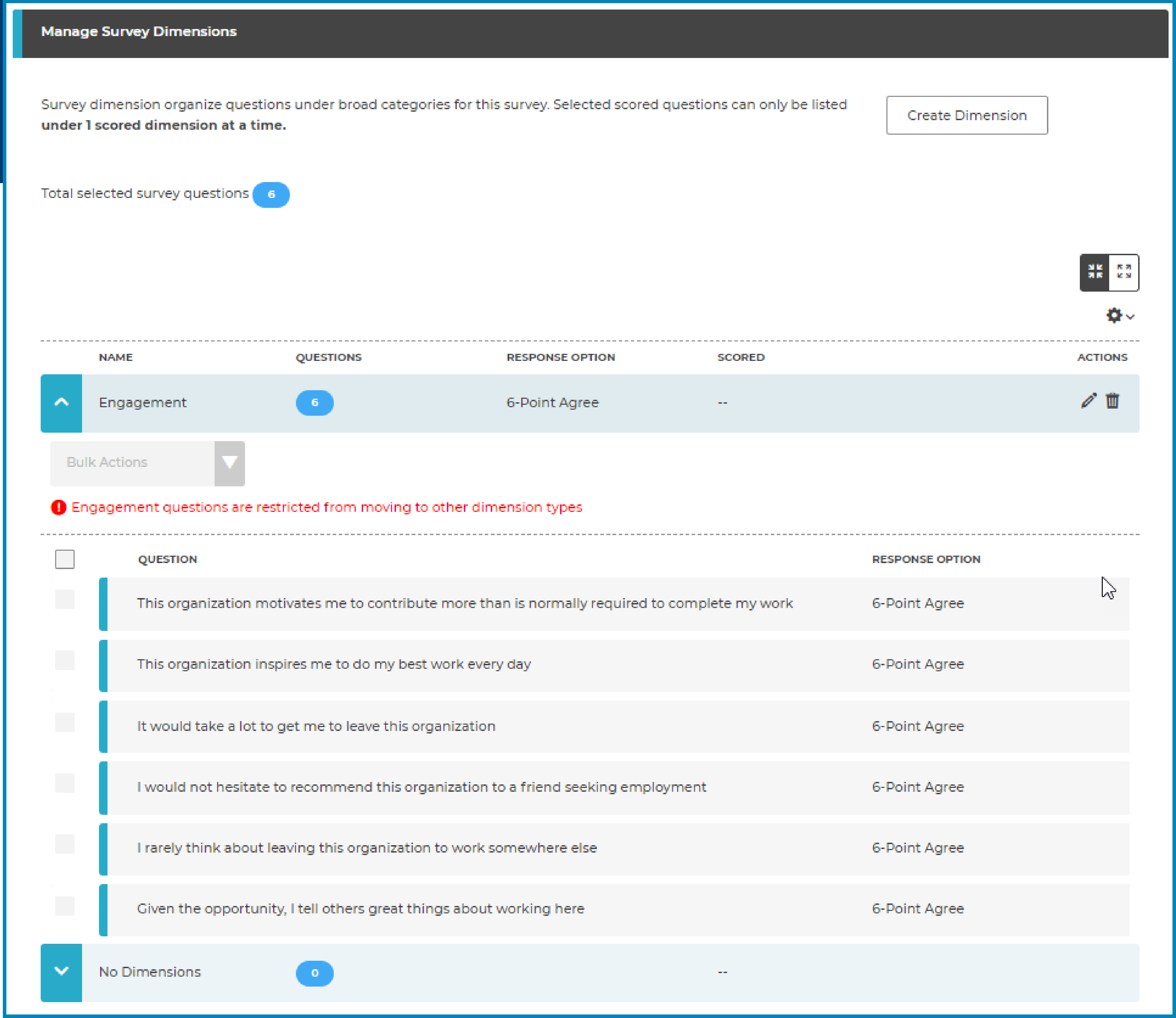


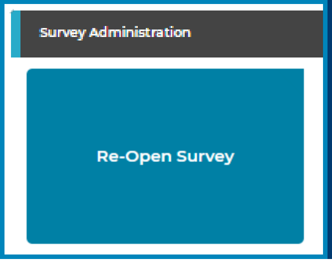



# Manage Dimensions

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.





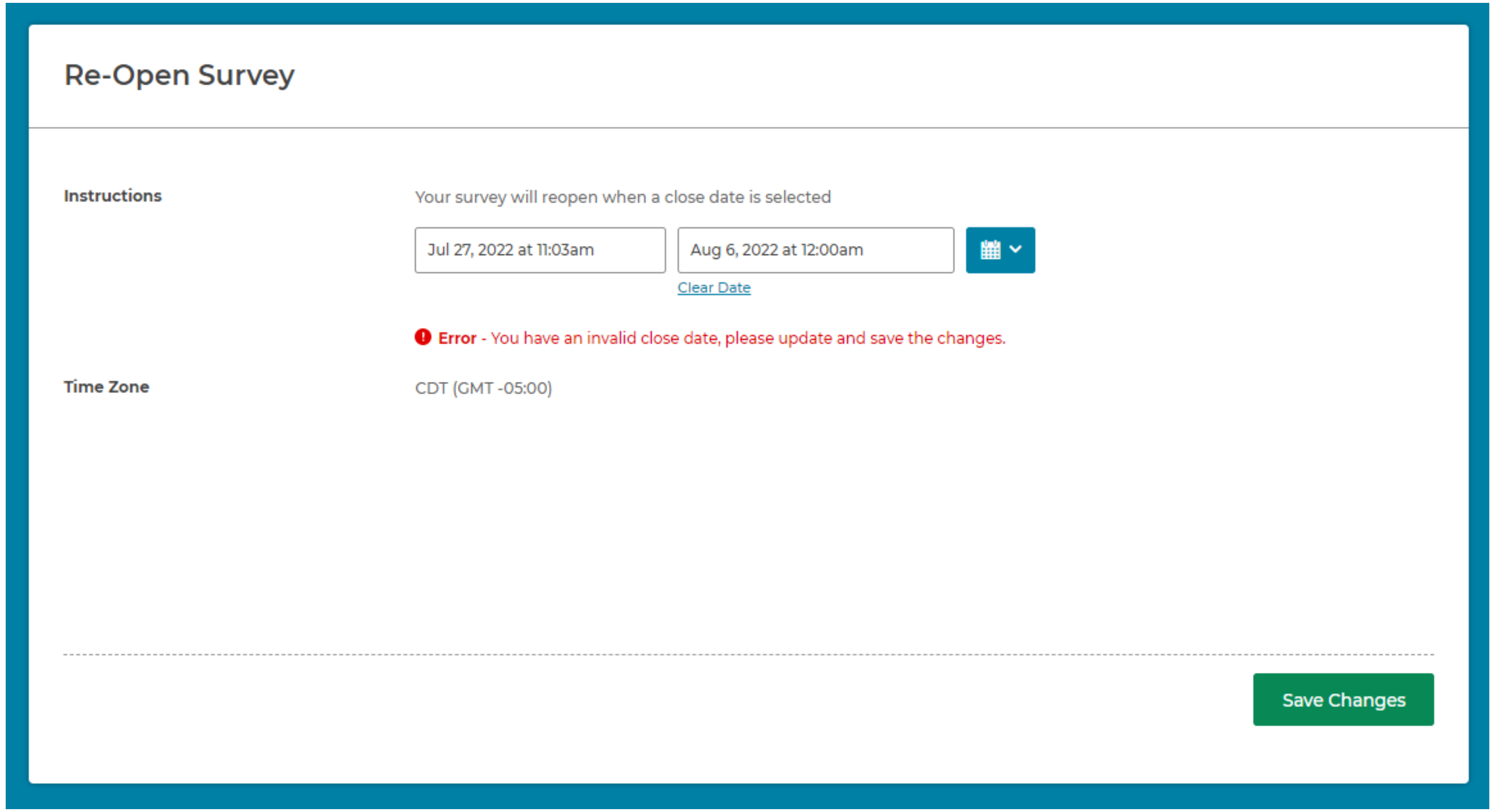

# Re-Open Survey for Everyone

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.

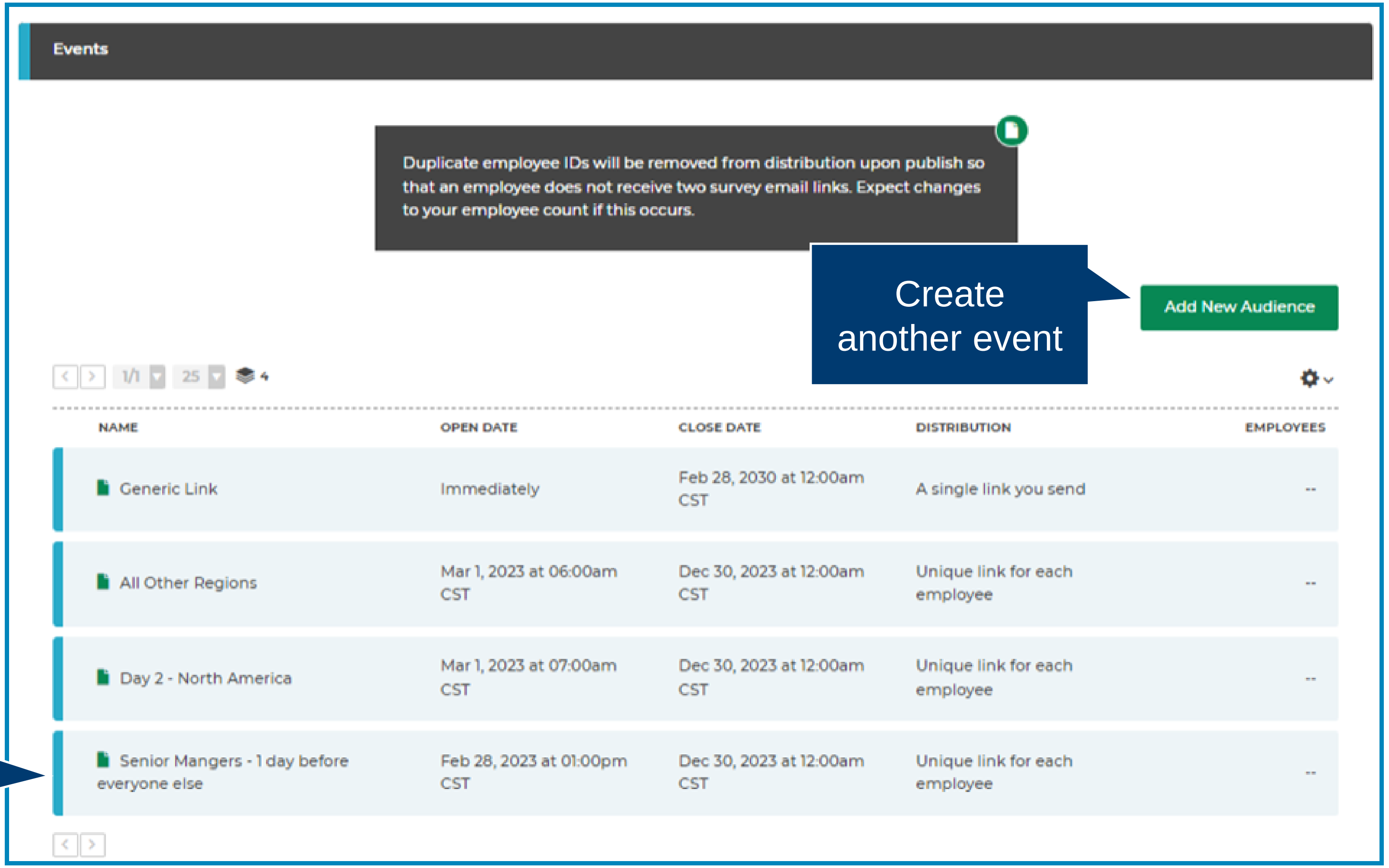
Awareness: If users already have access to the reporting site, the existing data will change after the new survey close date.



# 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.



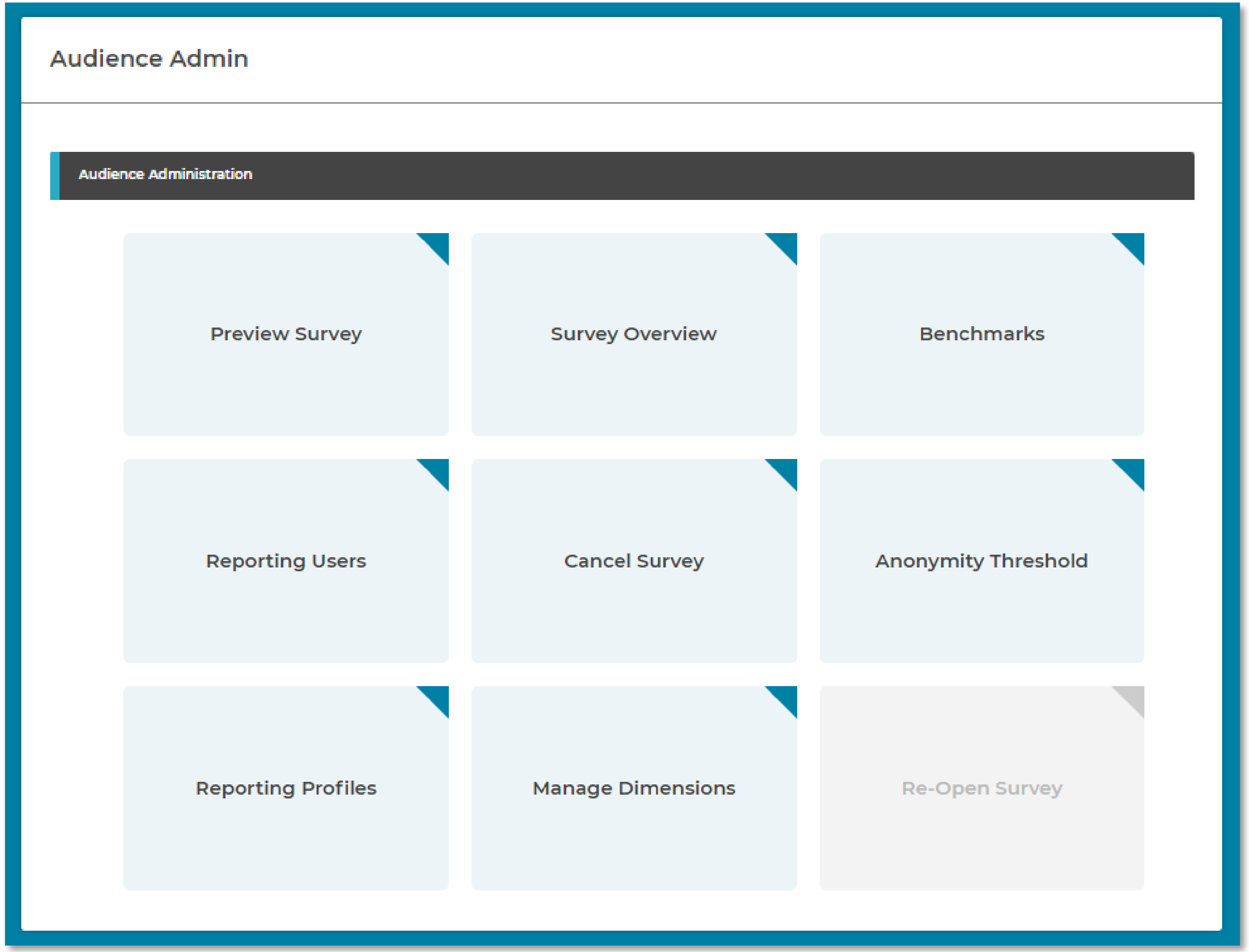

Create another event

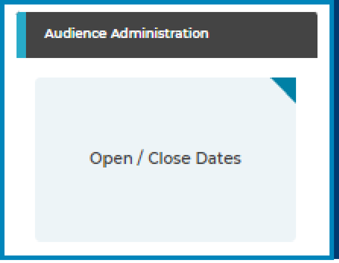
When the survey was published, Survey Builder looked across events for people with the same Employee ID's and removed duplicates.

# 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.

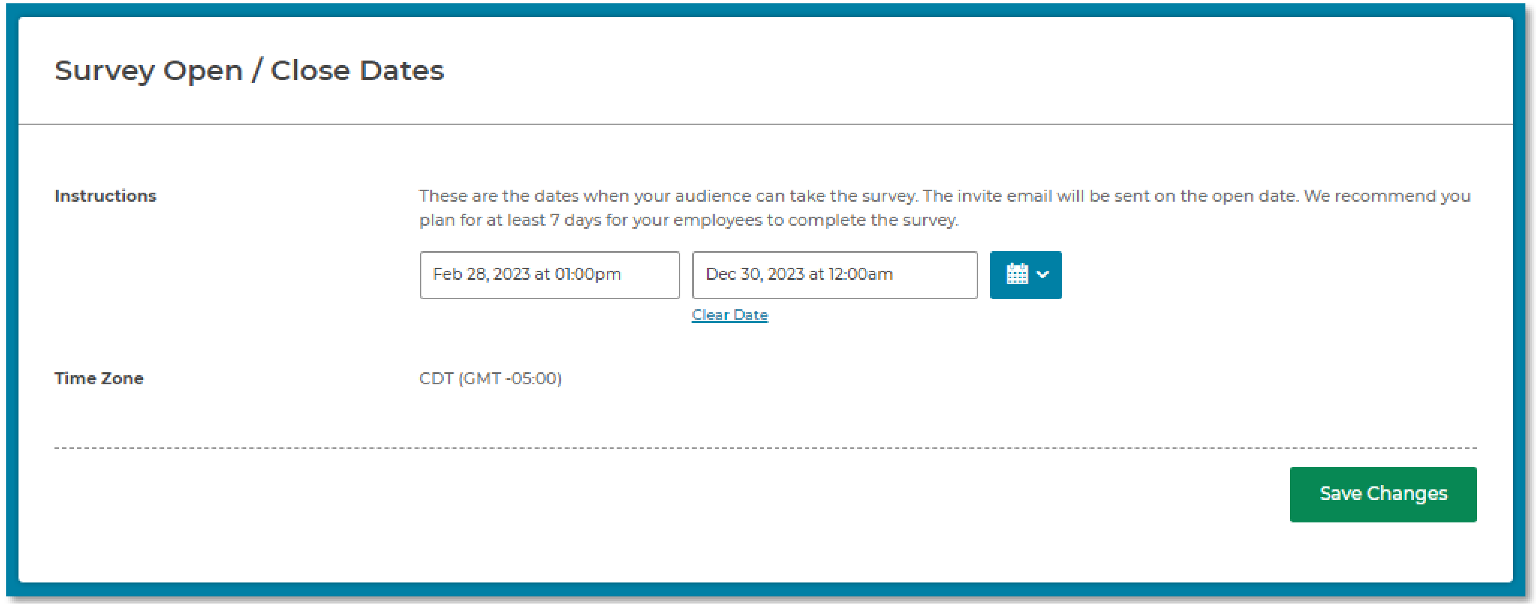


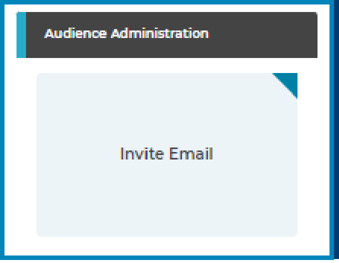



# Open and Close Dates

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.



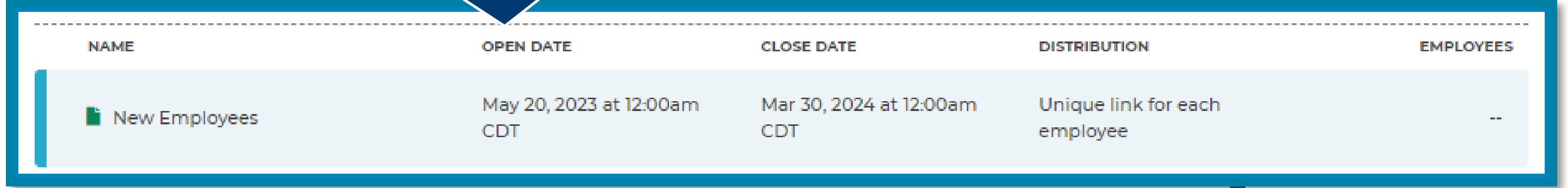


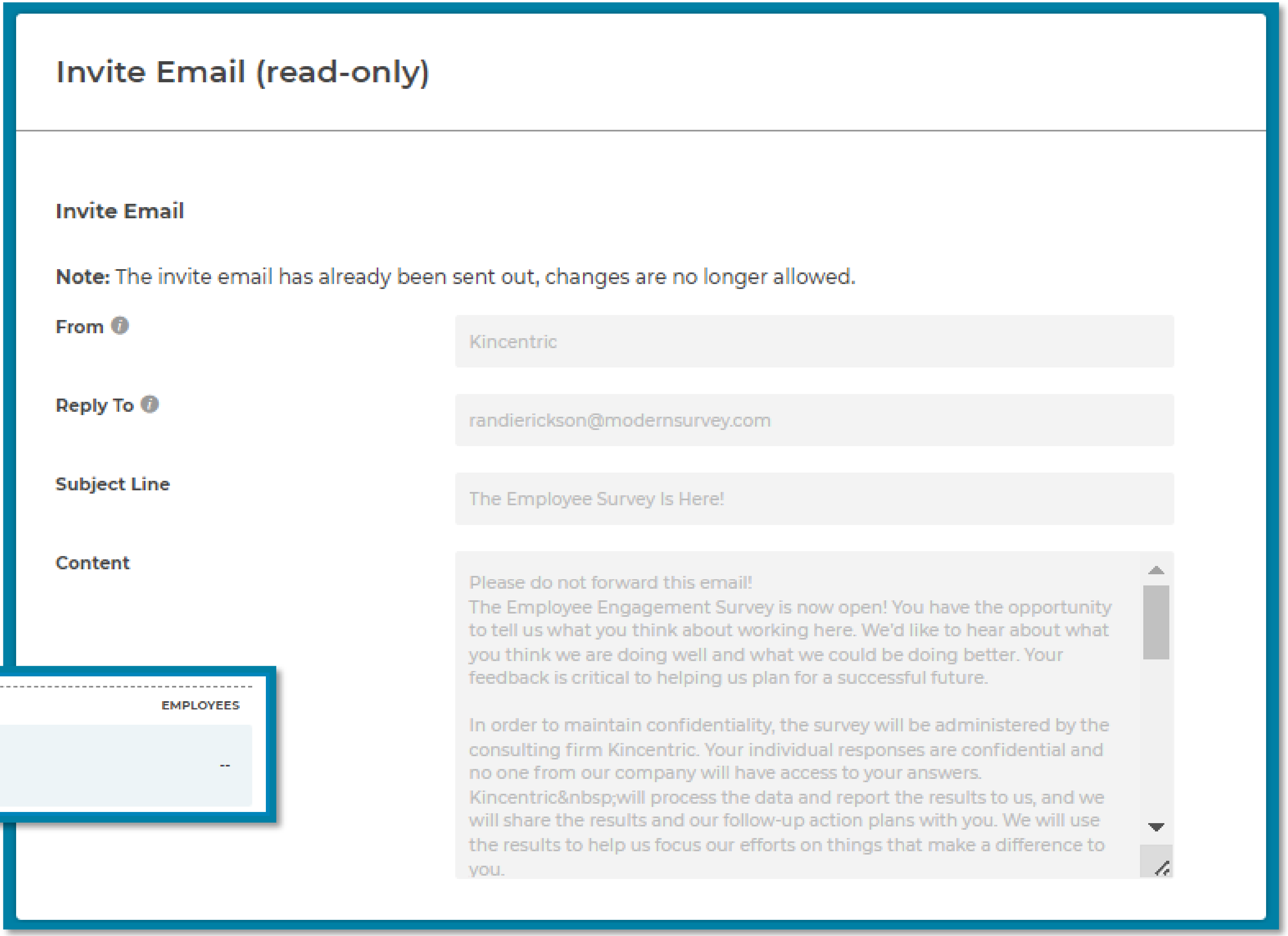

# Invite Email

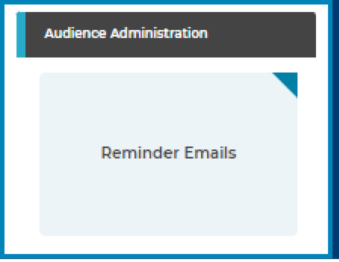
Invite Email allows you to edit the invitation text and send a test email.

- 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.



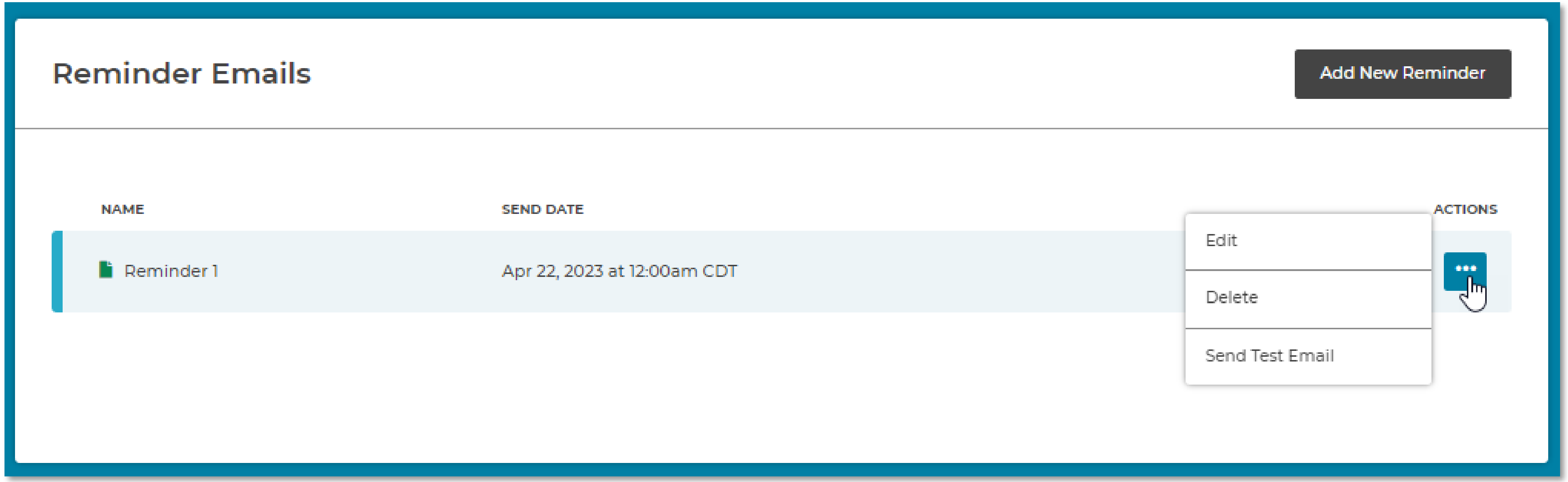



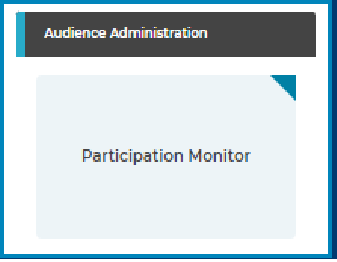



# Reminder Email

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.

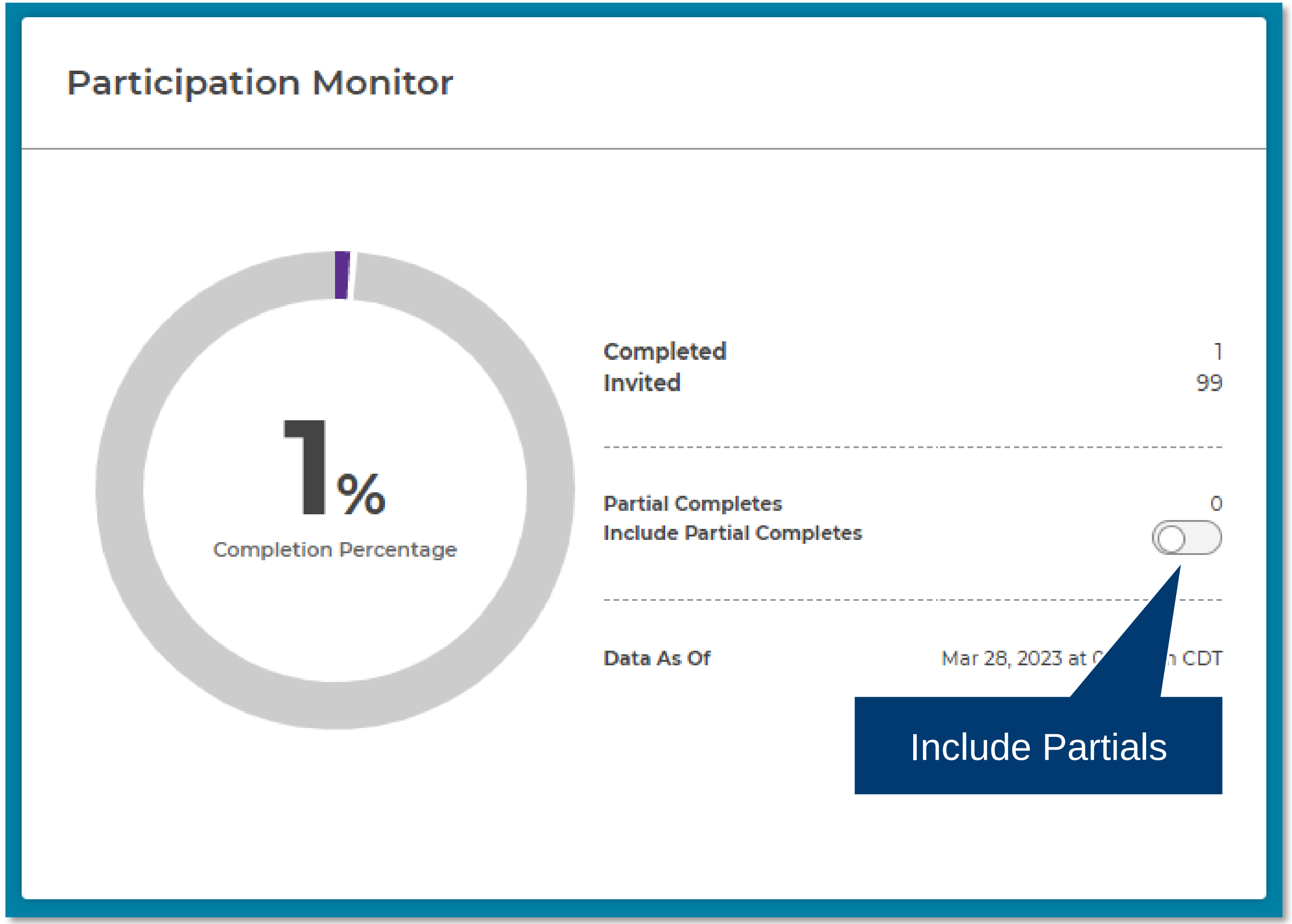


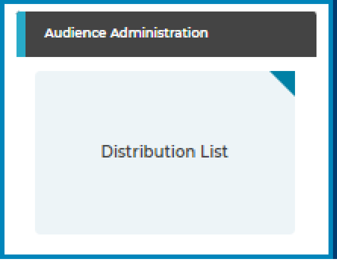



# Participation Monitor

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.

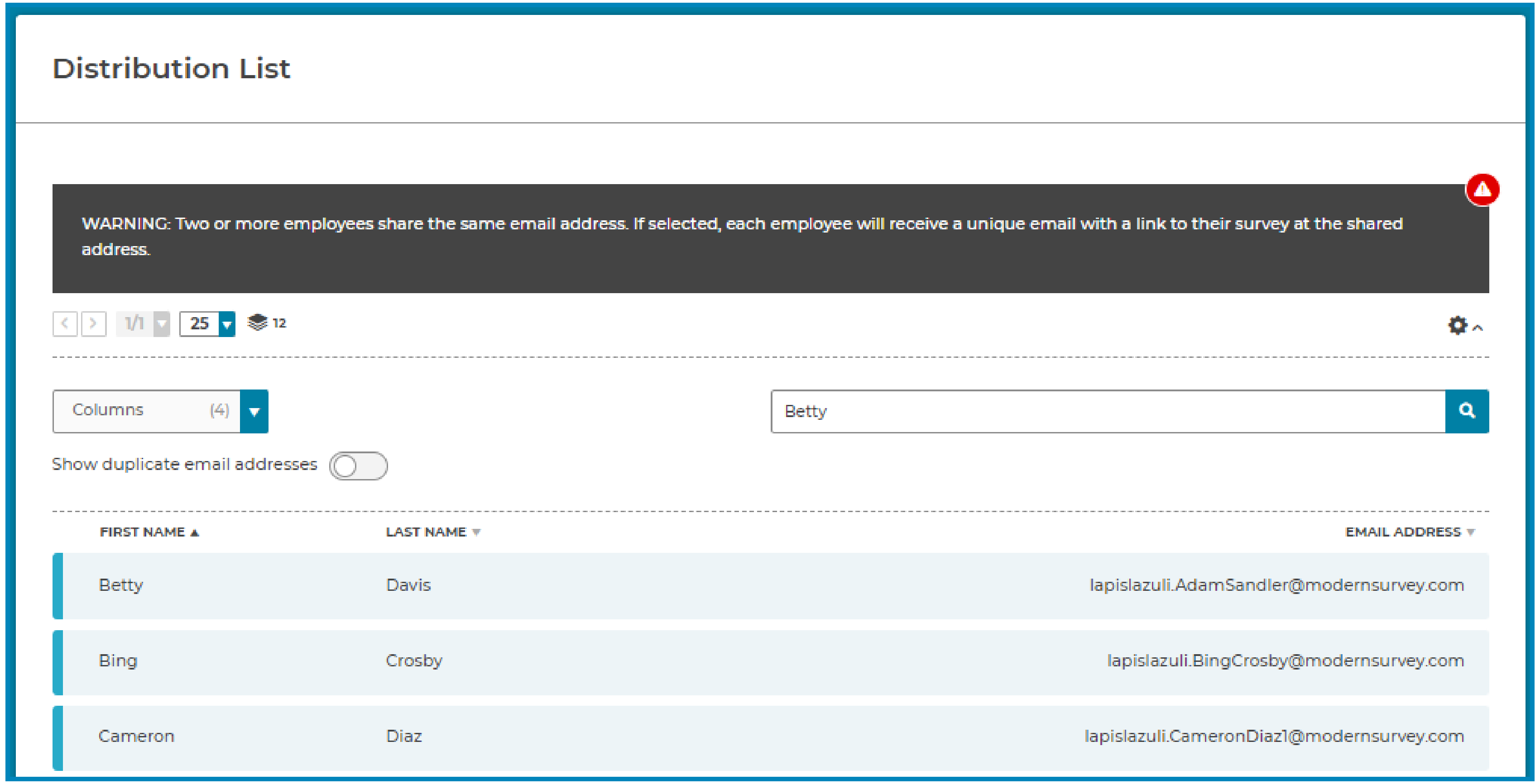





# Distribution List

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

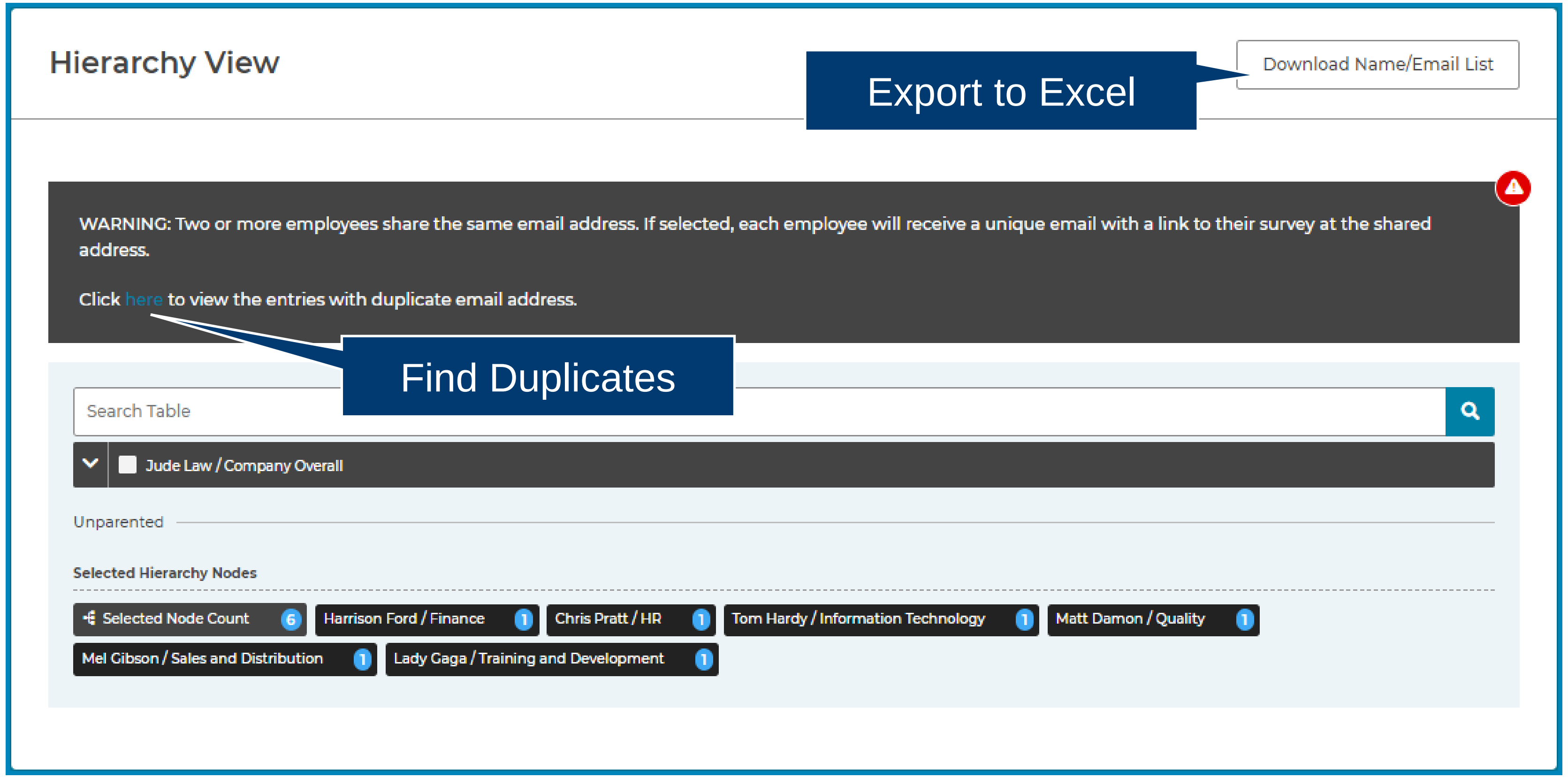
- Use the search feature to look for employees.
- The employees in this list are managed in Org Manager. This view is for reference only, no actions can be performed from this screen

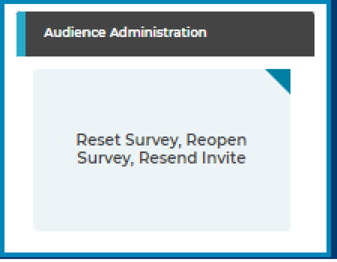


# Hierarchy View

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.

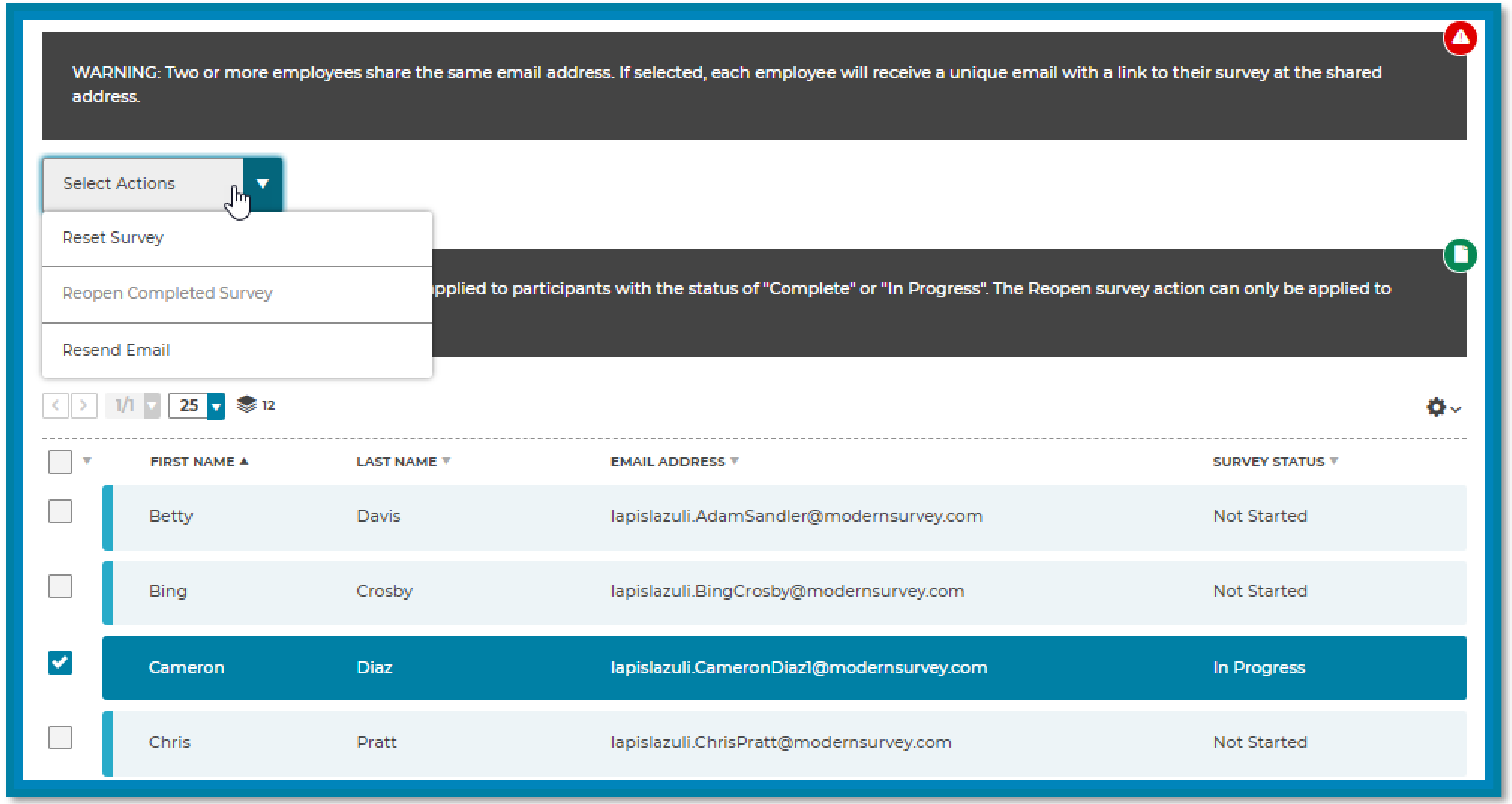


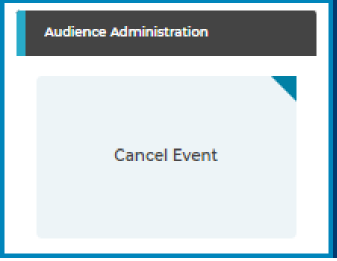



# Reset, Reopen and Resend

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.

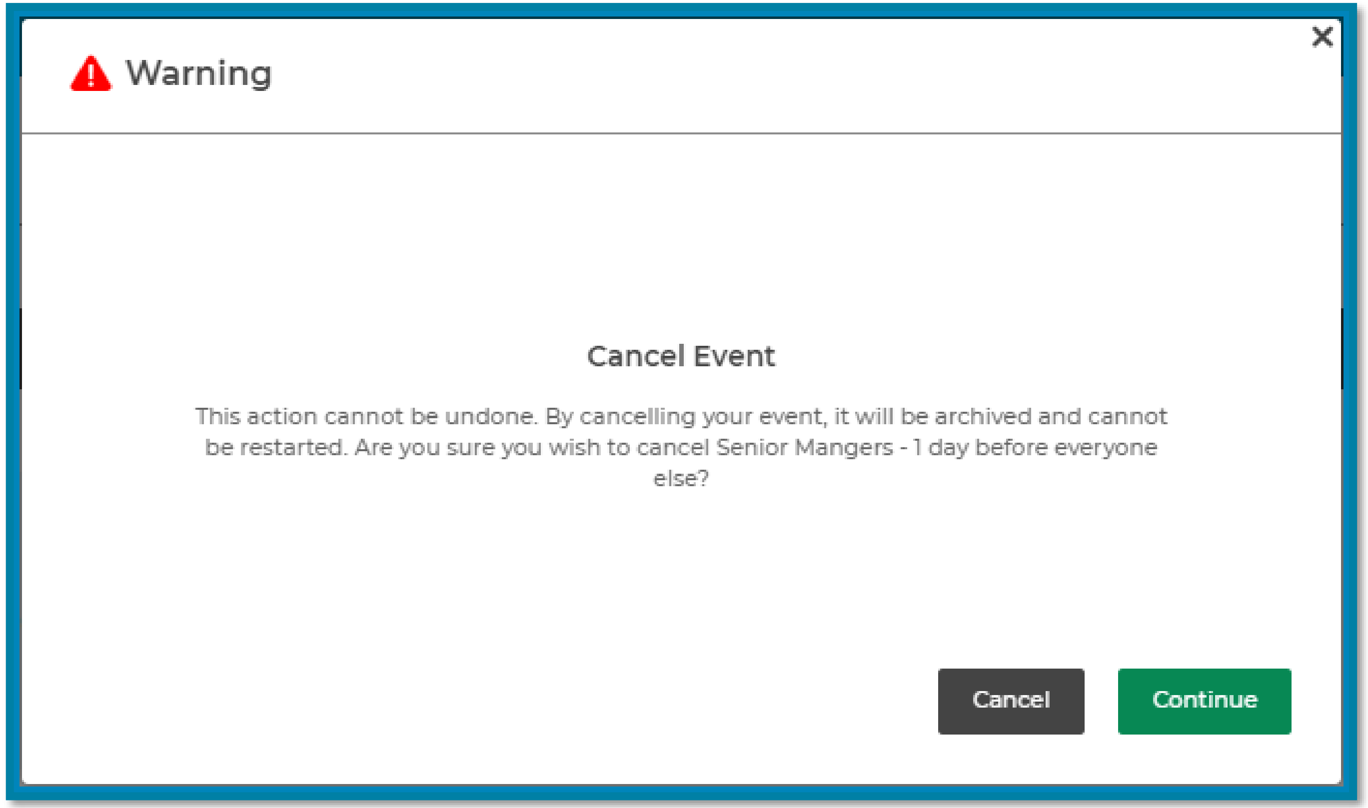


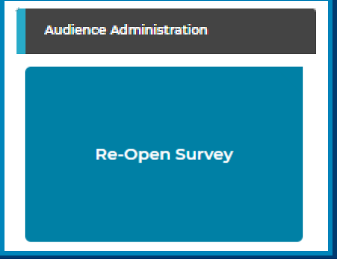



# Cancel Event

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.