class apps

Select Survey .NET

v5

Quick Start Guide v4 to v5

SelectSurvey.NET v4 to v5 Quick Start Guide

v.5.0 2/2018

This guide describes major navigational changes migrating from v4 to v5.
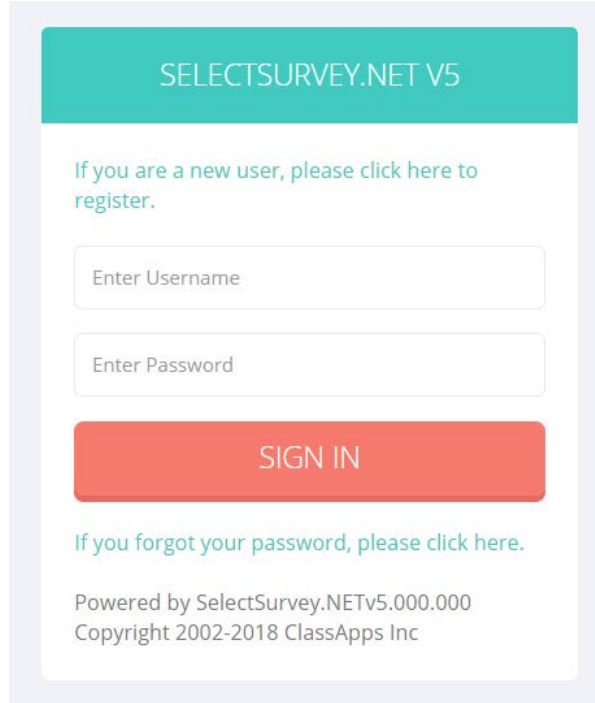
Contents

Getting Around the Application

Login

Using an internet browser or mobile device, click on or enter the URL link provided by your company or organization to login. You should see a login page that looks similar to the image below.

Strong Passwords

Strong passwords are required. **Your password must be 8 or more characters long and contain at least one lowercase letter, one uppercase letter, AND one symbol OR number.** The first time you login to v5 with your v4 password, you will be prompted to reset your password.
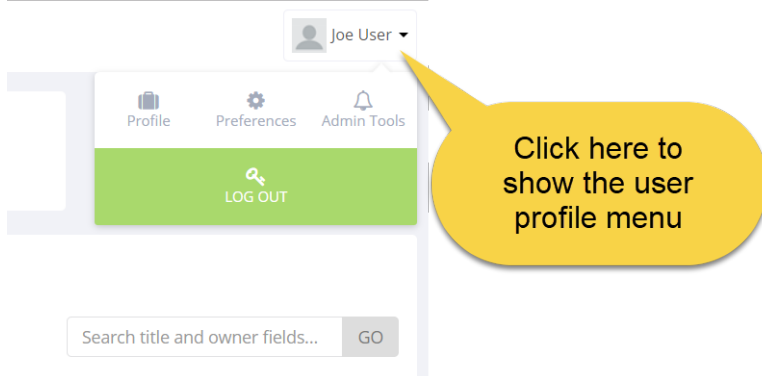
Resetting Your Password

After you enter your old login and password, you will be prompted to enter a new password in a strong password format. Your password must be 8 or more characters long and contain at least one lowercase letter, one uppercase letter, AND one symbol OR number.

Password Security

All personal data is encrypted, and no one can look up your password. To change your password, you must contact your onsite administrator for the survey application or click the forgot password link on the login page if the company has opted to display it there. If there is no forgot password link, you must go through the survey administrator to activate a password reset.
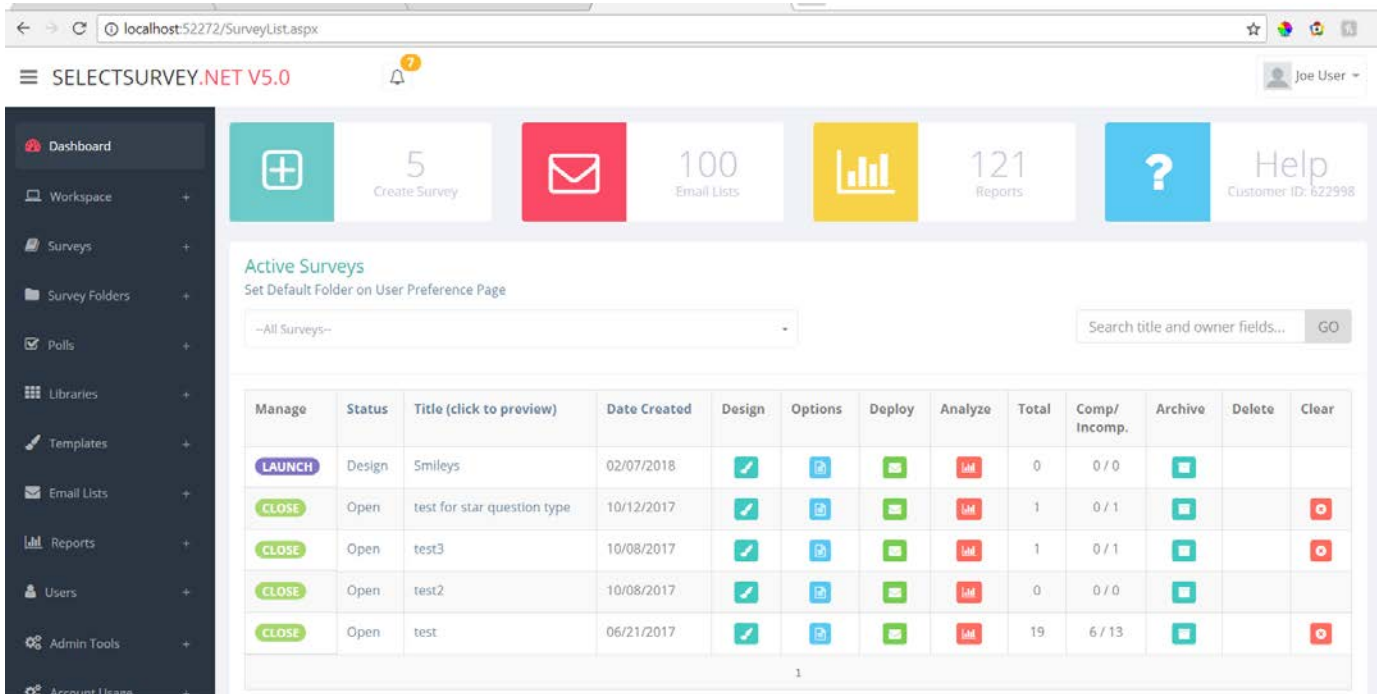
How to Logout of the Application

You must logout by clicking the logout button before closing the browser and exiting the system. Remember to click Logout when you are finished. Click your name in the upper right corner then click the green "Logout" button. This is also where you change your contact information and email for the forgot password functionality. Make sure your contact information is up to date.
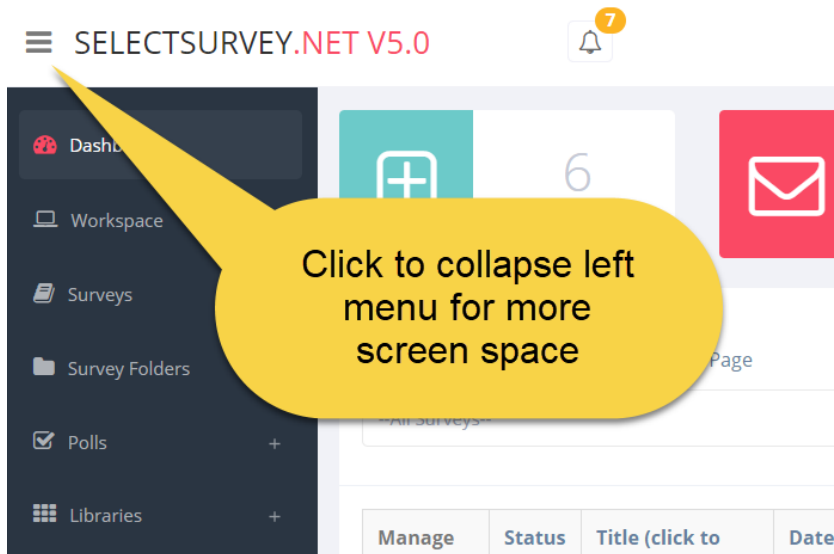

Dashboard Navigation

The below image is the Survey List Dashboard window that you will normally see right after logging in. You will see all of your surveys listed here that you have permissions to, similar to v4.
The large icons at the top of the page are clickable, click the large plus sign to create a survey. Click the large question mark for help.

All navigation links are in the left menu so it only takes one click to get to the page you need. The left navigation menu is collapsible and expandable.
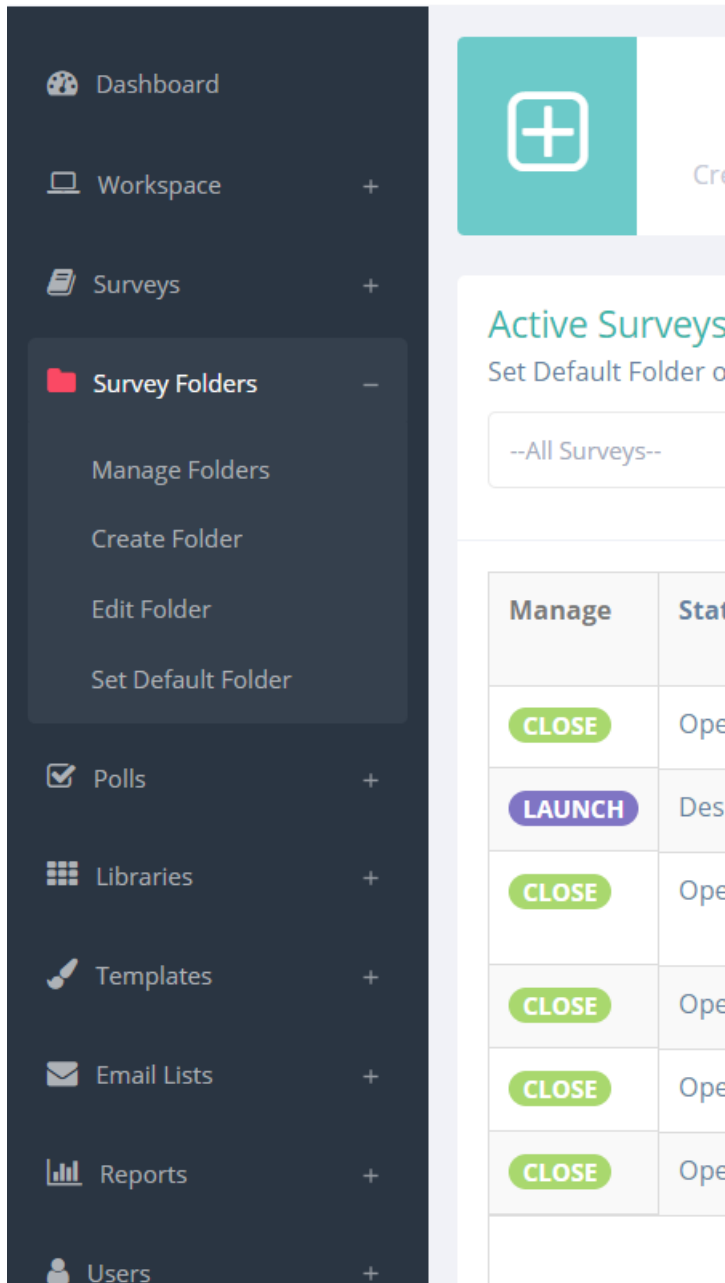
Collapsible Menus

To increase screen space, you can collapse or expand the left menu by clicking the menu icon as shown below:

Sub Menus

You can expand the folders in the left navigation as shown below by clicking on them to see sub menus. This is the easiest way to navigate the application.

User Profile and User Preferences
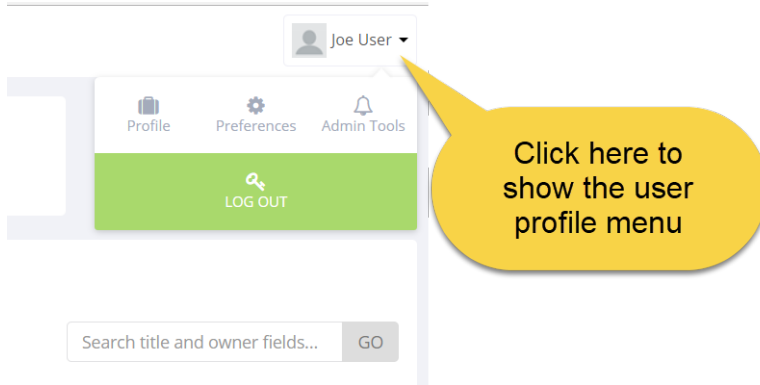
You can expand In the right hand corner you will see the name of the person logged in. If you click the dropdown next to your name, you will see a menu containing a link to edit your profile, user preferences and to logout. If you are an admin user you will also have access to the admin tools.
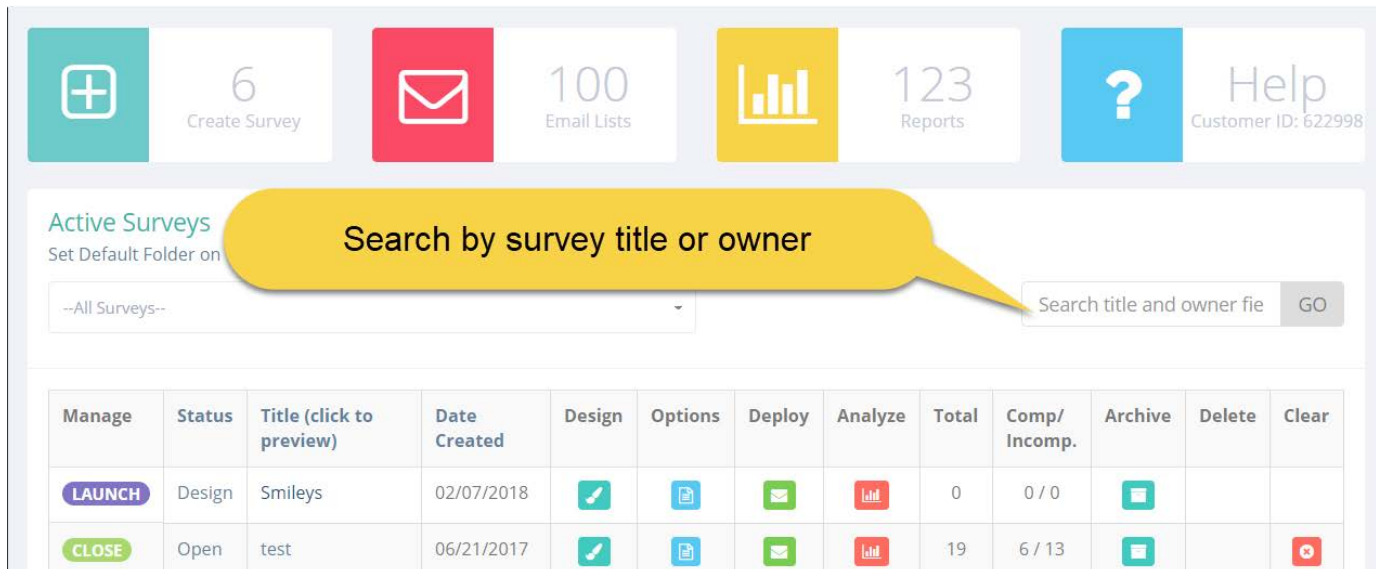

Search Functions

There are search boxes on most pages to assist with filtering your results to help you find the items you need to work with.

To search for a survey:
- From the **Manage Surveys** page type a survey's name or owner in the search bar and click **go**.

To access all surveys in a folder:

- From the **Manage Surveys** page click the dropdown arrow in the **Browse Survey Folders** field and select the folder
- Click **Go**

Active Surveys

Set Default Folder on User Preference Page

--All Surveys--

Default Folder					
--Surveys Not In Folders--					
--All Surveys--					
Manage	**Status**	**Title (click to preview)**	**Date Created**	**Design**	**Options**	**Deploy**
CLOSE	Open	Test Survey	02/09/2018	🖌	📄	✉
LAUNCH	Design	Smileys	02/07/2018	🖌	📄	✉

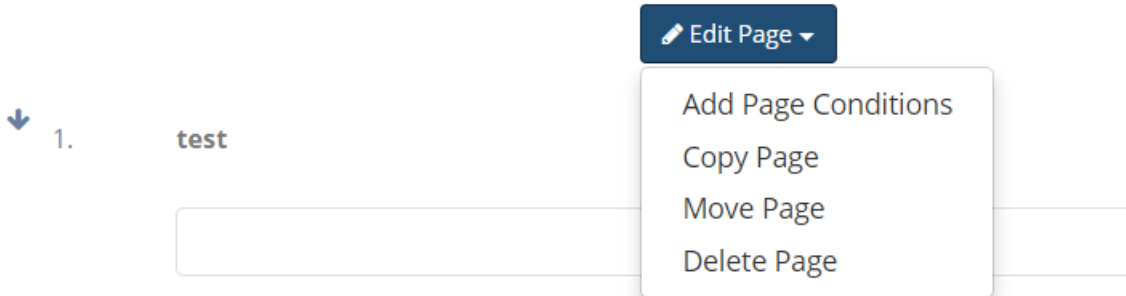# Modifying Surveys – Navigation Changes

Some of the functions on the modify survey page have been consolidated into submenus as shown in the screenshot below:
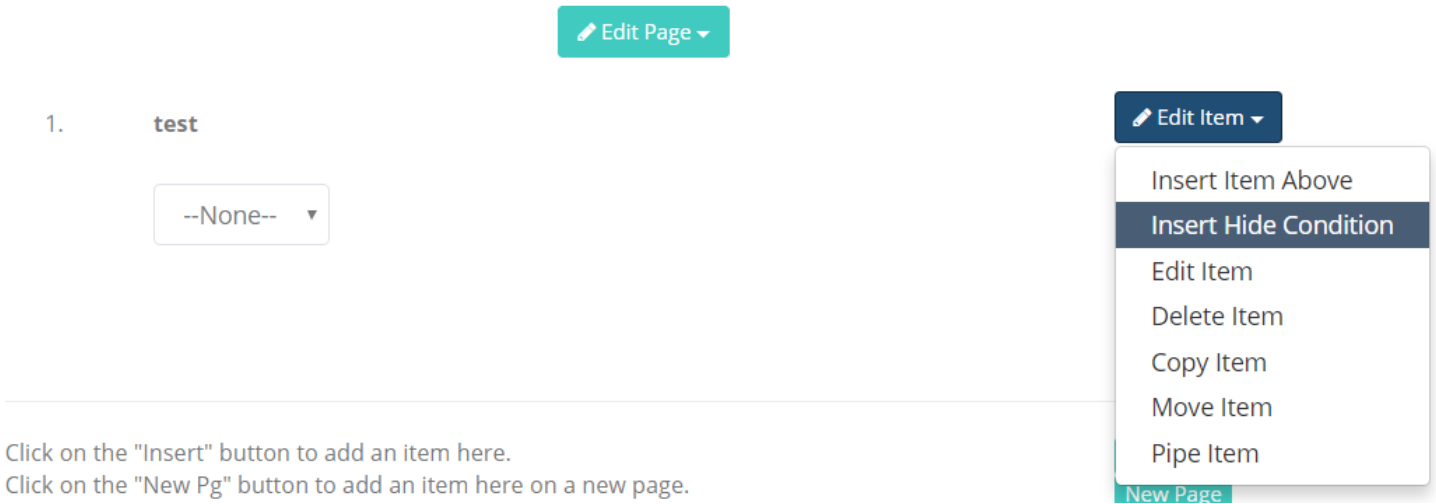
testing 2-15

Options

Click on the "New Pg" button to add a new item on a new first page.

[No Title Entered]

✎ Edit Page ▾

Add Page Conditions
Copy Page
Move Page
Delete Page

↓   1.   **test**

If a button has a down arrow on it – that means it has sub items which will display when you click it.

✎ Edit Page ▾

1.   **test**

--None-- ▾

✎ Edit Item ▾

Insert Item Above
Insert Hide Condition
Edit Item
Delete Item
Copy Item
Move Item
Pipe Item

Click on the "Insert" button to add an item here.
Click on the "New Pg" button to add an item here on a new page.

New Page

The top right button "Survey Settings" is where you will find a lot of the familiar survey options.

Modify Survey

This survey is currently LOCKED for editing by Joe User. It will become availa   nutes has passed with no activity. Click here to unlock and exit the survey

Click "Preview"

CLOSE **PREVIEW** **SURVEY SETTINGS ▾**

| Page 1 | Page 2 | All Pages |

Test Survey

✏ Options

Click on the "New Pg" button to add a new item on a new first page.

New Page

[No Title Entered]