

# QUICK START GUIDE

The intent of this Quick Start guide is to help you get started building your first survey. Every survey is different, and with a feature-rich survey tool, there will be many ways to customize and build your survey. This guide is intended to get you pointed in the right direction.

We expect and look forward to you sending us support questions if you run into anything you're not sure how to do – that's expected because while it is easy to add questions to create a basic survey, if you have complex requirements, they are likely unique ones and we want you to ask us for help if you need it!

That all said, read on to learn how to create and launch your survey!

## WELCOME EMAIL

To login, you can click the link your welcome email. You will be prompted to enter your own password or accept the system generated password:



### Set password

Password \*

Repeat password \*

Random password (suggestion):

Save

# LOGIN

To log in to your account, enter your username and password.



Administration

Username

Password

2FA key (optional)

Language

 ▼

Log in

[Forgot your password?](#)

*Note: On our trial platform, while 2FA is enabled, you won't need to enter a value on your first login. You can enable it on your account once you have logged in. How to do this isn't covered in the quick guide.*

Click the green **Log in** button.

If you forget your password, you click the **Forgot your password?** link to request a password reset link.

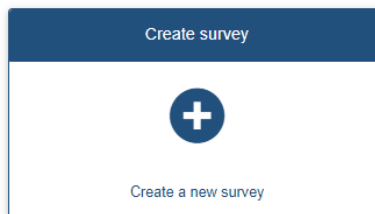
## WELCOME PAGE:

Once you log in, you'll be directed to the admin page where you can create a new survey or access an existing one:

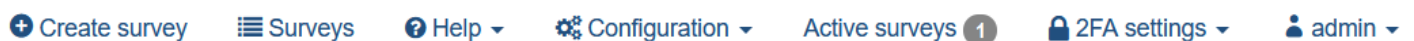


## CREATING NEW SURVEY

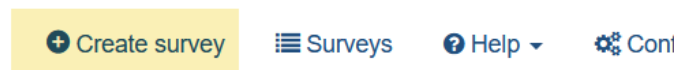
To create a new survey, you can click the **Create Survey** box on the welcome page:



You can also use the **Administration toolbar** (found at the top of every page) to create a new survey, access previously created surveys, manage your account, and set up your and log out:



To create a new survey, from any page, click **Create survey** from the admin toolbar:



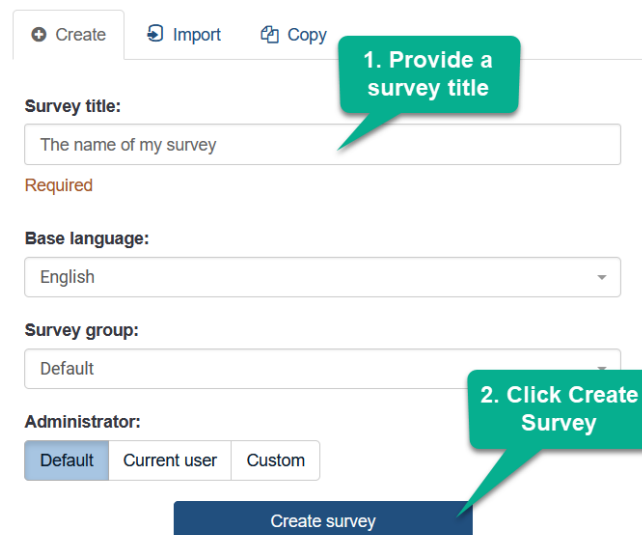
A survey has three integral elements:

- a survey title
- at least one group of questions
- at least one question

Optional elements of a new survey include:

- Applicable answers to each question
- Modifiable labels (known as label sets)
- Conditions that determine whether a question should be asked

To create a new survey, the only piece of information you must provide is a **Title**. After clicking on **Create Survey**, you will be prompted for this information:



The screenshot shows the 'Create Survey' form with the following fields and options:

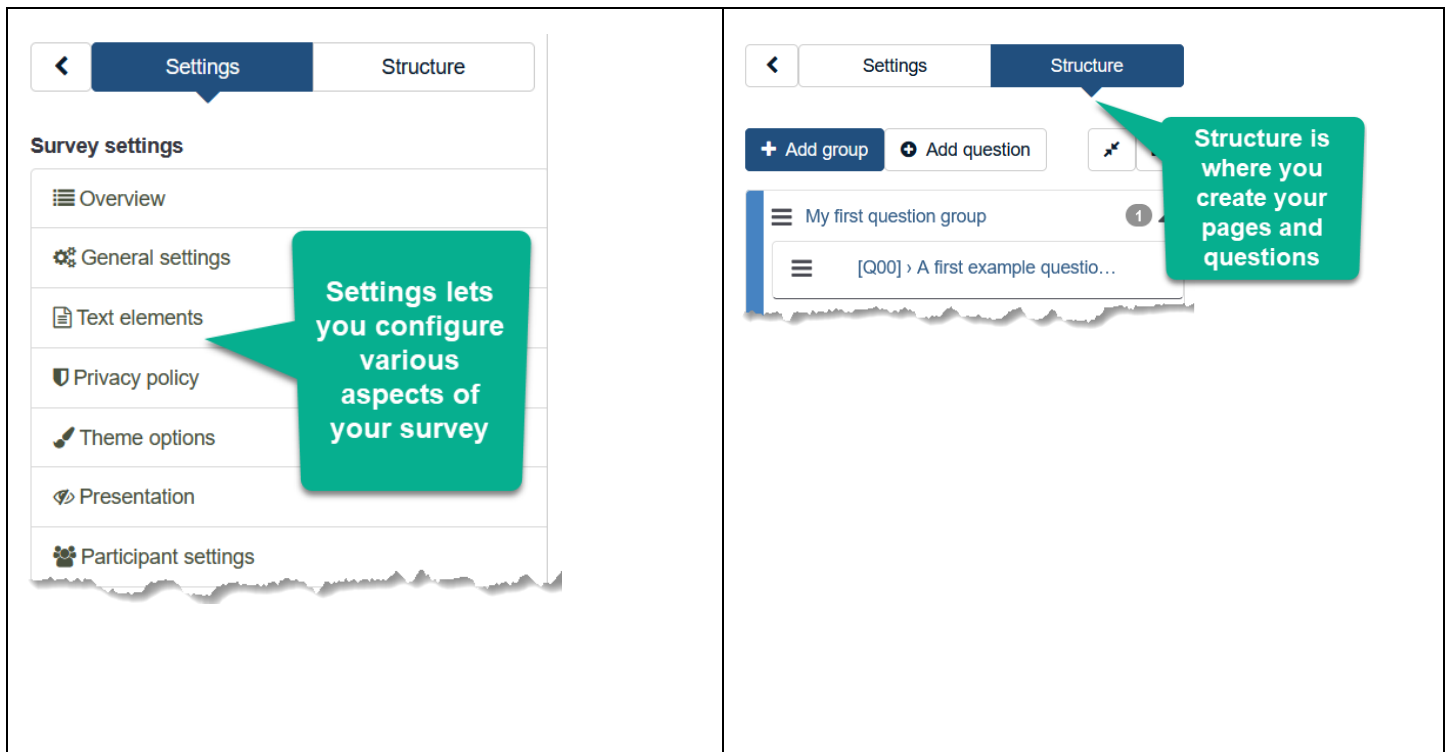
- Create** (selected), **Import**, **Copy**
- Survey title:**  (Required)
- Base language:**
- Survey group:**
- Administrator:**  Default,  Current user,  Custom
- Create survey** button

Callouts:

- 1. Provide a survey title (points to the Survey title field)
- 2. Click Create Survey (points to the Create survey button)

Once you complete the information above (Title being the only required field), click **Create survey** to create your survey.

You will be redirected to the **Survey Summary** page for your new survey. This page is comprised of a left tab style menu with two important elements: **Settings** and **Structure**:



The image displays two screenshots of the Survey Summary page interface, illustrating the 'Settings' and 'Structure' tabs.

**Left Screenshot (Settings Tab):** The 'Settings' tab is selected. The 'Survey settings' menu includes: Overview, General settings, Text elements, Privacy policy, Theme options, Presentation, and Participant settings. A green callout box states: "Settings lets you configure various aspects of your survey".

**Right Screenshot (Structure Tab):** The 'Structure' tab is selected. The interface shows options to '+ Add group' and '+ Add question'. Below, a list of question groups is visible, including 'My first question group' and '[Q00] > A first example questio...'. A green callout box states: "Structure is where you create your pages and questions".

The **Summary Page** (accessed by clicking **Settings->Overview**) contains useful general information about your survey:

Survey summary : 2023 Parks Program Satisfaction Survey (ID 888467)

**Click gear icon to edit items**

Share survey	
English (Base language):	https://demo.hostedincanadasurveys.ca/888467?lang=en
End URL:	-
Number of questions/groups:	10/1
Sharing panel:	<input type="button" value="Open sharing panel"/>

**Public link to the survey**

**QR code and social sharing**

Text elements:	
Description:	This survey will be used to guage the level of satisfaction among parents and participants who use the CVRD Parks Program. We are constantly looking for ways to improve the program to better serve the participants, and the information obtained by this survey assists us in achieving that goal.
Welcome:	Thank you for choosing to participate in the 2023 CVRD Parks Program survey! We greatly appreciate the time you've taken... <input type="button" value="Show more"/>
End message:	Thank you for your feedback on the 2023 CVRD Parks Program. We take great consideration in all feedback we recieve and a... <input type="button" value="Show more"/>

Publication and access settings:	
Start date/time:	21.08.2023 13:20
Expiration date/time:	01.09.2023 09:00
Listed publicly:	No

**Shows the period the survey is available to participants**

Survey general settings	
Owner:	admin (support@hostedincanadasurveys.ca)
Administrator:	Someones Name (email@example.com)
Theme:	AccessibilityPro2022 ( AccessibilityPro2022) <input type="button" value="🗑️"/> <input type="button" value="✍️"/>

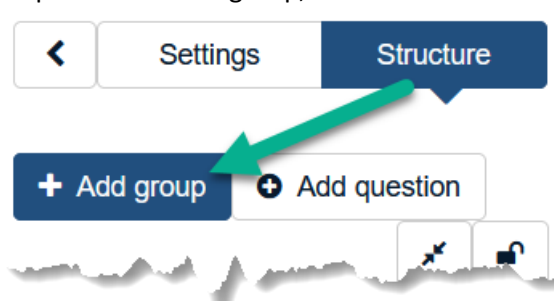
Hints and warnings:	
Responses to this survey are anonymized.	
It is presented group by group.	
Participants have partially finished	



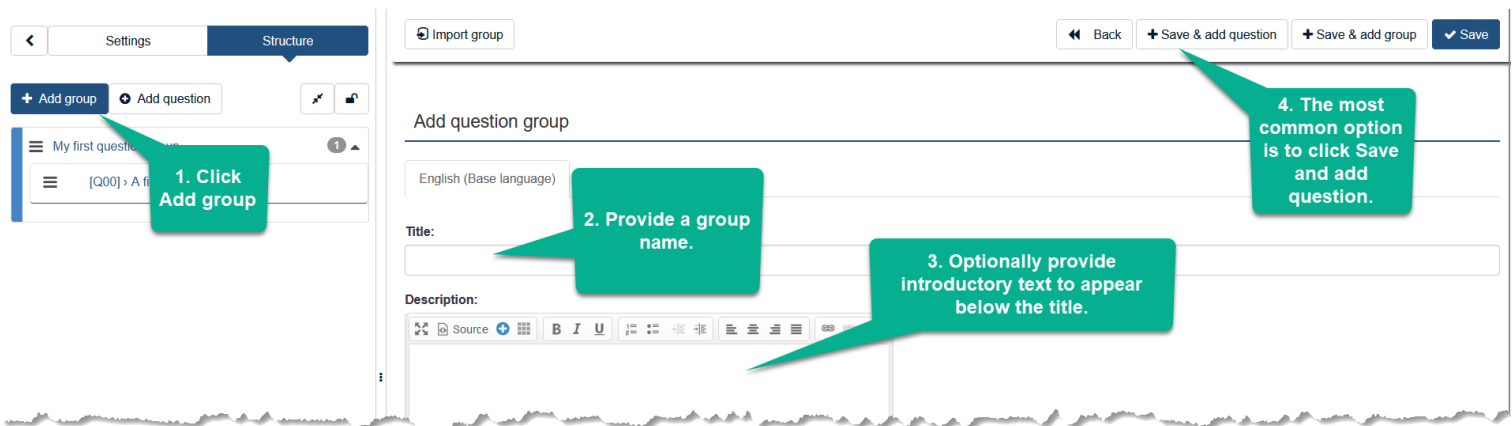
## CREATING A QUESTION GROUP

Survey questions need to be organized in groups. Groups can also be used to create pages of questions. You can choose to have all your questions in one group or separate questions into several groups. You can later configure your survey to display all questions on one page, or display them per group, or question by question (a single question on a page).

Your survey must have at least one group. To create the group, click on the **Structure** tab, and then click **Add group**:



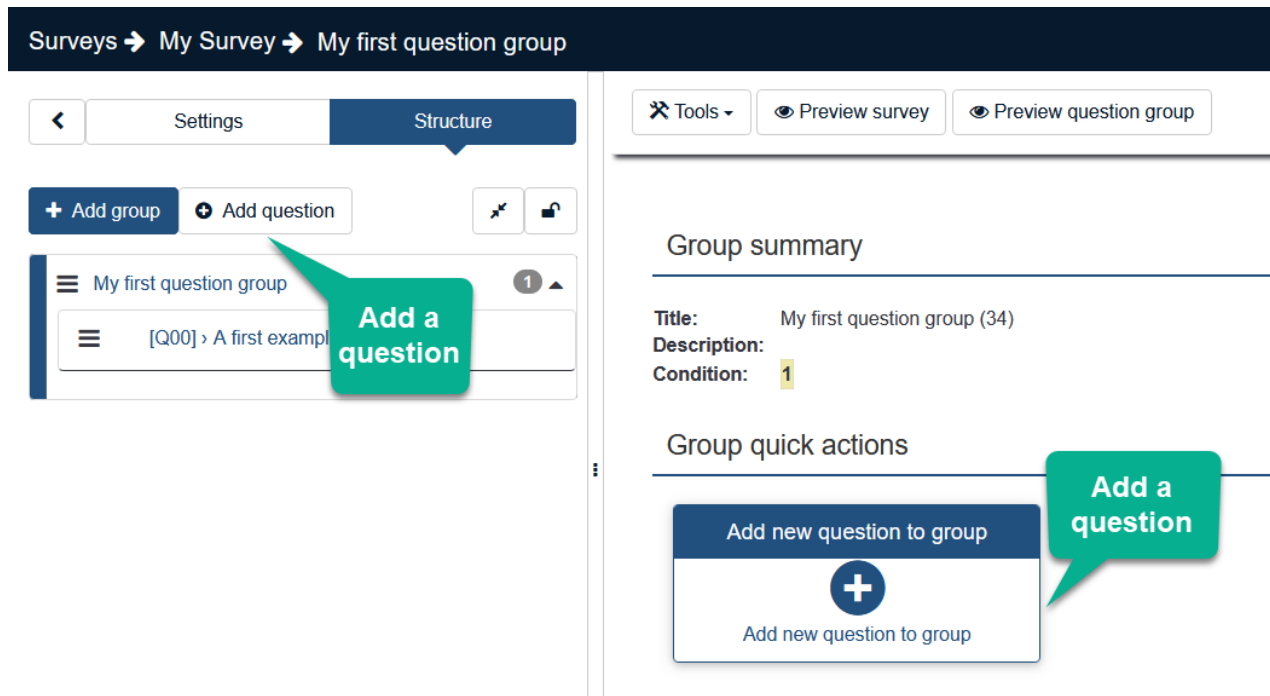
Give the new group a title and a short description (optional), and press **Save and add question**:



## CREATING QUESTIONS

There are several ways to add a new question. As noted on the previous page, if you've just created a group, you can click the "Save and add question" button.

Alternatively, from the Structure tab (and also from the Group Summary page) you can click buttons to add a new question:

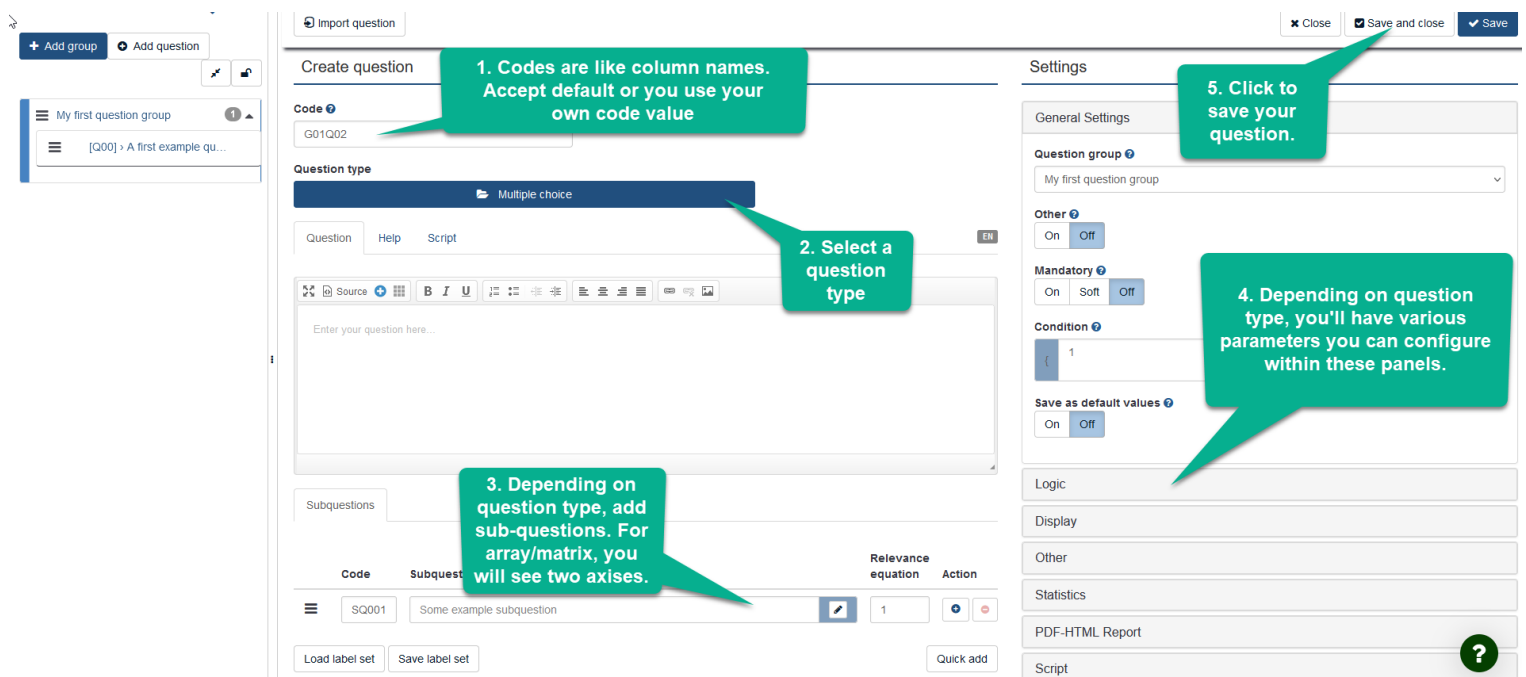


The screenshot displays the survey management interface. At the top, a breadcrumb trail reads "Surveys → My Survey → My first question group". Below this, there are two main sections:

- Structure Tab:** On the left, the "Structure" tab is active. It features a "Settings" button and a "Structure" button. Below these are "Add group" and "Add question" buttons. A green callout bubble labeled "Add a question" points to the "Add question" button. Below the buttons is a list of question groups, with the first one being "My first question group" containing a question "[Q00] > A first exampl...".
- Group Summary Page:** On the right, the "Group summary" page is shown. It includes a "Tools" dropdown, "Preview survey", and "Preview question group" buttons. The summary shows: "Title: My first question group (34)", "Description:", and "Condition: 1". Below this is the "Group quick actions" section, which contains a button labeled "Add new question to group" with a plus icon. A green callout bubble labeled "Add a question" points to this button.



When you click to add a new question, you will see the “Add a new question” form. To create your question, complete the following steps:



The screenshot shows the 'Create question' form with the following callouts:

- 1. Codes are like column names. Accept default or you use your own code value** - Points to the 'Code' field containing 'G01Q02'.
- 2. Select a question type** - Points to the 'Multiple choice' selection in the 'Question type' dropdown.
- 3. Depending on question type, add sub-questions. For array/matrix, you will see two axes.** - Points to the 'Subquestions' section.
- 4. Depending on question type, you'll have various parameters you can configure within these panels.** - Points to the 'Settings' panel on the right.
- 5. Click to save your question.** - Points to the 'Save' button in the top right corner.

Here is a list of question settings:

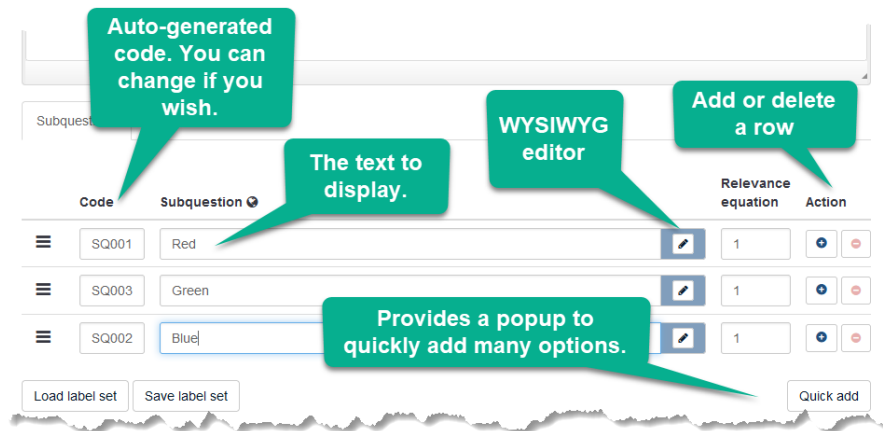
- **Code** – a unique identifier of the questions. A code is generated for you. A code is like a column header name in Excel. You can use your own codes. Try to be consistent with your coding in this field. Planning will make your evaluation a lot easier later. This field is normally not displayed to people taking the survey. The question Code must be unique across the same survey, must start with a letter, and only contain letters and numbers. If you have ever tried to export your data to SPSS or R, you may have discovered that this code becomes the value label.
- **Question** - the actual question being asked.
- **Question Type** – where you what type of question this will be (single choice, multiple choice, open text, array/matrix, etc).

Some question types require specific **answers** or **subquestions**. For example, a List (radio) type question will require answer options (something for people to choose from). Multiple choice and array (matrix) type questions will need sub-questions. In the screen shot above, box 3 indicates where you'll enter these values.

When you click Save on the “Add a new question” page, you will be directed to the **Question Summary** page. From there, you can add another question.

## ADDING ANSWERS OR SUB-QUESTIONS

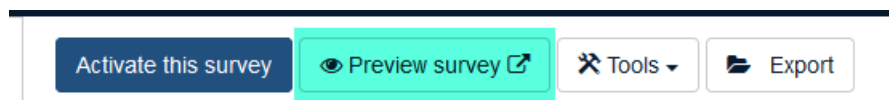
For question types that require **answers** or **sub-questions**, the interface will behave the same in both cases:



## PREVIEWING AND ACTIVATING SURVEY

You can test your survey at any point by clicking **Preview survey** on the **Survey toolbar**. This allows you to check how the survey looks before you activate. When testing a survey, your responses will not be saved.

All pages will have the **Preview Survey** button. Click on the left menu tab **Settings** and then **Overview** to see the **Activate this survey** button.



After creating all your questions, you will need to activate the survey by clicking **Activate this survey** located on the **Survey toolbar**. Once the survey is activated you can no longer add/delete groups and questions (you can still edit some texts).

## THE SURVEY LINK

To get people to participate in your survey, you can share the survey link with them (there are also more sophisticated solutions, involving importing a list of participants and using the platform to send out email invitations).

At the minimum though, you find the survey link by clicking on the left menu tab **Settings** and then clicking **Overview**. On the Survey Summary page, you will find the link to your survey under the **Survey URL** block:

Survey summary : 2023 Parks Survey (ID 1)

Share survey	
English (Base language):	<a href="https://demo.hostedincanadasurveys.ca/188284?lang=en">https://demo.hostedincanadasurveys.ca/188284?lang=en</a>
End URL:	-
Number of questions/groups:	1/1
Sharing panel:	<input type="button" value="Open sharing panel"/>

**Link to share with participants**

**QR code and Facebook & Twitter(X) integration**

This is the link you can share with your participants. If your survey has multiple languages, you'll see corresponding links for each language.

There is also social sharing and a QR code you can generate:

Share survey

Share QR-code:

English

**Click Generate QR code to view the code.**

Share on Facebook:

English

**Click enable for Facebook sharing**

Share on Twitter:

English

## GETTING ADDITIONAL HELP



We know our platform is feature rich, and we know you'll have questions. Every survey has unique requirements, and it isn't possible for a user guide to cover every scenario under the sun. But don't worry, our support team is here to help you every step of the way. On any page, click the green help icon to submit your question, and our team will be happy to point you in the right direction – either to a knowledge base article, or provide you with custom step-by-step directions, or a personalized screen movie to answer your questions.