



# Surveys

User Guide for ActiveWorks Conference 6.3

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# Introduction to Surveys

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Welcome to the *Surveys Guide* for Conference™, part of the ActiveWorks, Events platform from The Active Network.

Conference lets you use surveys to gather opinions or other data from attendees at your event. Survey responses can help you analyze attendees' attitudes toward your event as a whole, or toward your sessions, speakers, or any other aspect of your event. This can help you determine how you can improve your event so that you can improve event attendance.

You can create these types of surveys in the Conference system:

- **Conference Survey.** This type of survey lets you gather feedback about your event in general. (For example, after your event is over, you can ask for feedback about attendee experience at your event as a whole.)
- **Session Surveys.** These types of surveys let you gather feedback about specific sessions offered at your event. (For example, after a user has attended a session, you can gather information about how informative the session was for the user.)

This document explains how to create surveys, display surveys to attendees, and view survey reports in the Conference system. It explains these topics:

- [Surveys Overview](#)
- [Creating or Modifying Surveys](#)
- [Displaying a Survey](#)
- [Working with Survey Reports](#)

## Surveys Overview

---

These steps summarize how the Conference system lets you manage surveys for your event:

1. You create the surveys you want to use for your event. You choose the type of survey and add the questions and possible responses to each question.
2. You determine the attendees who can view each type of survey and where the surveys can be accessed, and grant access by setting up preferences and limitations.
3. You decide when each survey should be made available and, if applicable, publish the surveys.
4. After survey data has been gathered, you use reports to review the data.

This section explains these topics:

- [Overview of Surveys](#)
- [Overview of Survey Types](#)
- [Overview of Survey Question Types](#)

## Overview of Surveys

Attendees access surveys from the Scheduler or through your on-site kiosks. Survey administrators manage surveys through the Conference Administrator web site. To help you plan basic survey functionality, the following figures show some sample web pages and an example survey, and indicate the areas that you can set up.

Figure 1: Displaying surveys on the Scheduler Home page

The screenshot shows the "Scheduler Home" page. It features a "How to Schedule a Session" section with instructions on automatic and manual scheduling. Below this, there are two survey sections: "General Conference Surveys" and "My Event Survey" under the heading "Surveys", and "Session Surveys" with the text "Thank you for your feedback." under the heading "Session Surveys".

**When an attendee accesses your Scheduler web site and logs in, published surveys display at the bottom of the page.**

**Setup Choice**  
You can specify the types of surveys that display here. (For details, see [Choosing Survey Preferences](#) on page 30.)

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Figure 2: Displaying session surveys in the Session Catalog

The screenshot shows the 'Session Catalog' interface. At the top, there is a 'Basic Search' section with a search box, a dropdown for 'in the' (set to 'Title'), and a dropdown for 'Criteria' (set to 'Show All'). Below the search is a table with columns: All, Type, Technical Level, Day, My Interests, and Suggested Sessions. The table lists several sessions, each with a 'Take Survey' link. A blue callout box points to the 'Take Survey' link for the session '802.17 RPR Protocol's Overview' with the text: 'To access the survey for a specific session, an attendee clicks a link in the Session Catalog.' Another blue callout box points to the 'Take Survey' link for the session 'Troubleshooting EIGRP' with the text: 'Setup Choice You can specify whether session surveys display in the Session Catalog. (For details, see Choosing Survey Preferences on page 30.)'

Figure 3: Displaying surveys on-site through a Cyber Cafe kiosk

The screenshot shows the 'activeevents CONNECT' Cyber Cafe kiosk interface. The user is logged in as Robert Smith. The interface includes a navigation menu on the left with options like Home, ActiveEvents Connect, MyScheduler, Conference Handouts, and Logout. The main content area shows a message: 'Hello Robert Smith, you have 1 unread messages since you last checked your inbox.' Below this are sections for 'Reminders', 'Conference Surveys', and 'Session Surveys'. The 'Conference Surveys' section shows 'All' and 'Conference Survey' links. A blue callout box points to the 'Conference Survey' link with the text: 'When an attendee logs in using the Cyber Cafe kiosk, published surveys display on the Cyber Cafe Home page.' Another blue callout box points to the 'Conference Surveys' section with the text: 'Setup Choice You can specify the types of surveys that display here. (For details, see Choosing Survey Preferences on page 30.)'

Figure 4: Survey building blocks

**Event Survey**

Please answer the following questions to help us improve our next event.

1. How did you hear about this event?

Trade magazine  
E-mail advertisement  
Business acquaintance  
Other

If other, please specify:

2. What was your level of satisfaction with the following:

	Very Satisfied	Satisfied	Unsatisfied	Very Unsatisfied
Overall experience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topics offered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speakers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handouts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Venue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entertainment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Short Answers**

3. What did you find most useful or enjoyable? Please be specific.

4. What did you find least useful or enjoyable?

Thanks for participating!

Submit

When an attendee clicks a survey link, the survey displays in a separate browser window.

**Setup Choice**

You can specify the content of each part of a survey, including:

- The survey name
- The header
- The types of questions, and the question contents
- Responses to the questions, if appropriate
- Size and ratings of any scale questions used
- Headings to group your survey questions
- The footer

(For details, see [Setting Up a Survey](#) on page 13.)

Figure 5: Participant questions

**Title:** Unified Computing API: What Developers Need to Know  
**Time:** Thursday, 9:00 AM - 10:00 AM  
**Speaker(s):** Roger Oliphar, Ken Halsted

**\* 1. Please rate the session on the following:**

	Excellent	Above Average	Average	Below Average	Poor
Session Overall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relevance to your business / job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Roger Oliphar**

**\* 2. Please rate the Speaker on the following:**

	Excellent	Above Average	Average	Below Average	Poor
Presentation Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Ken Halsted**

**\* 3. Please rate the Speaker on the following:**

	Excellent	Above Average	Average	Below Average	Poor
Presentation Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**4. Additional Feedback: (max 4000 characters)**

For surveys about sessions, the attendee can answer the same question for multiple session participants.

**Setup Choice**  
 You choose the roles that can display a question for multiple participants, and which questions will display for multiple participants. (For details, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

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Figure 6: Submitting a survey

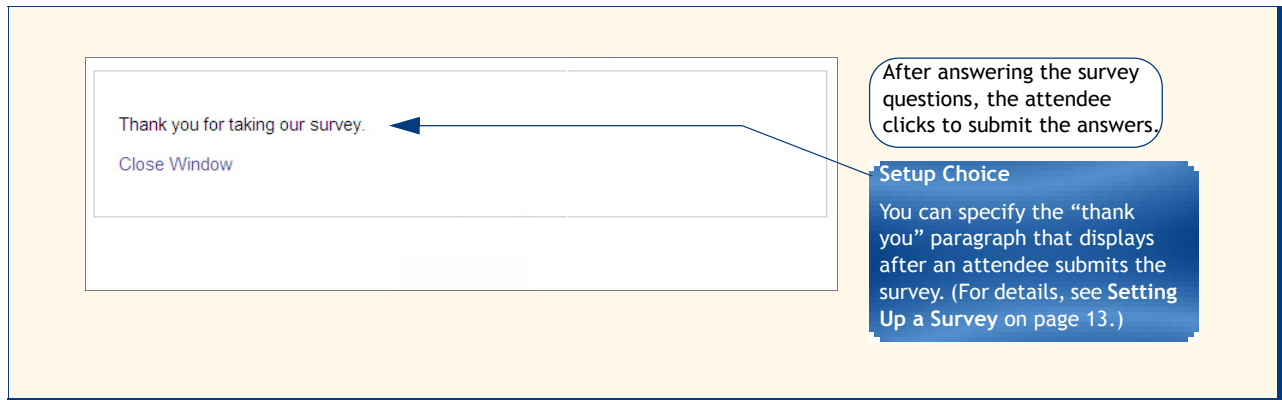
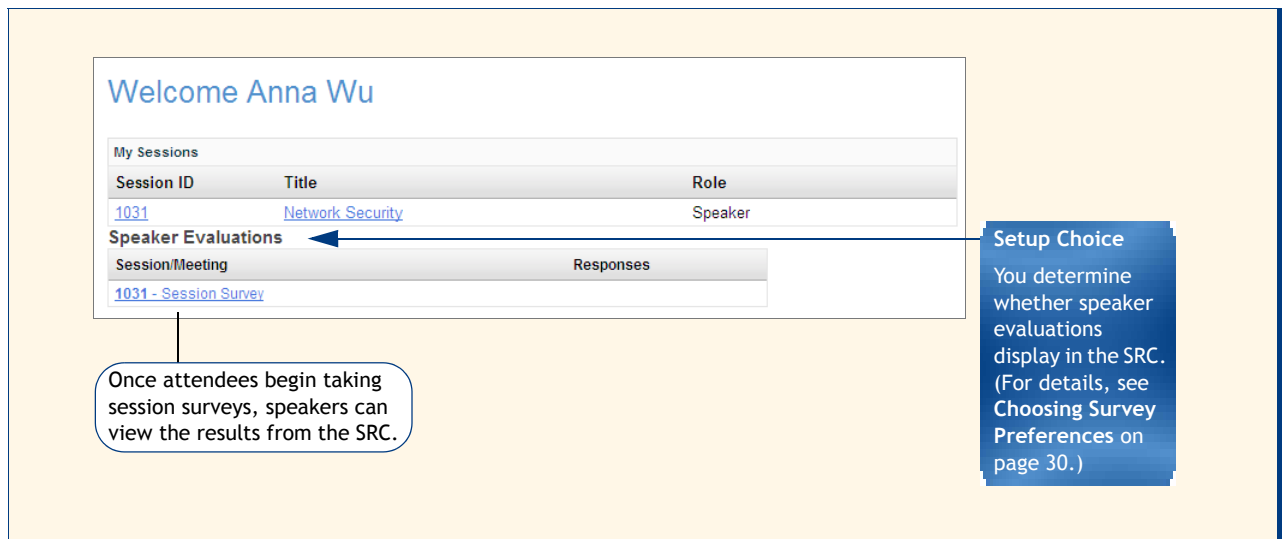


Figure 7: Displaying survey results in the Speaker Resource Center (SRC)



## Overview of Survey Types

You can create the following types of surveys in the Conference system:

- **Conference Survey.** Lets you gather information about your entire event. You can associate custom field values with a conference survey to allow only those attendees with a certain value to access the survey. This lets you customize your event survey for different attendees.

You can also choose to make a conference survey anonymous, and then send a link to the survey to attendees using email. The link to an anonymous survey contains no identification information so that, if an attendee takes the survey from the link sent to them instead of after logging in, the source of gathered data cannot be identified.

- **Session Survey.** Lets you gather information about a single session, or about a group of sessions you specify. For example, you could use the same survey for all sessions with the same theme, such as sessions about network security.
- **Session Type Survey.** Lets you gather information about all sessions of a specific type, such as all workshops or all panel discussions.
- **Session Profile Survey.** Lets you gather information from attendees who meet any custom field values you choose. For example, if you define content tracks in your catalog, you could create surveys for attendees who follow specific content tracks.

You can use multiple surveys of any type. For example, you can have a conference survey that targets speakers, and another conference survey aimed at general attendees. As another example, you can ask for different responses from beginners and experts.

You can also use multiple surveys for a single session. For example, for an entry-level workshop, you could have a session type survey that gathered information about all workshops, a session survey specific to the workshop, and a survey for all beginners at your event.

## Overview of Survey Question Types

You can have the following types of questions in a survey.

Table 1: Survey Question Types

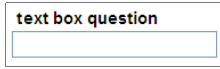
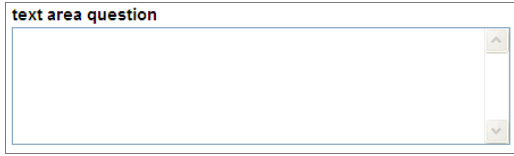
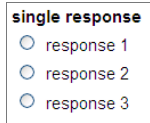
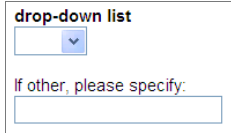
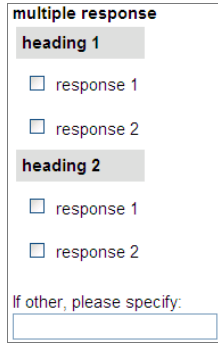
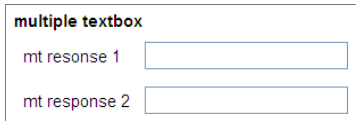
To Let Attendees Do This	Use This Type of Question	Example
Type in a short response or numerical answer	Text box	
Type in a long response	Text area	
Choose one response by clicking a button	Single response	
Choose one response from a drop-down list	Drop-down list	
Choose one or more responses by marking a check box	Multiple response	
Type in multiple short responses or numerical answers (can require that numbers entered equal 100)	Multiple text box	

Table 1: Survey Question Types (continued)

To Let Attendees Do This	Use This Type of Question	Example																								
Rate an item using a scale	Scale	<div data-bbox="906 352 1044 531" style="border: 1px solid black; padding: 5px;"> <p><b>scale questions</b></p> <p><input type="radio"/> Option 1</p> <p><input type="radio"/> Option 2</p> <p><input type="radio"/> Option 3</p> <p><input type="radio"/> Option 4</p> <p><input type="radio"/> Option 5</p> </div>																								
Rate multiple items using a scale	Scale matrix	<div data-bbox="906 569 1409 869" style="border: 1px solid black; padding: 5px;"> <p><b>scale matrix</b></p> <p style="text-align: right;">Option 1   Option 2   Option 3   Option 4   Option 5</p> <p>scale matrix heading 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">smh1 item 1</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>smh1 item 2</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> </table> <p>scale matrix heading 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">smh2 item 1</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> <tr> <td>smh2 item 2</td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> <td style="text-align: center;"><input type="radio"/></td> </tr> </table> </div>	smh1 item 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	smh1 item 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	smh2 item 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	smh2 item 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
smh1 item 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																					
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smh2 item 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																					

For surveys about sessions, you can set up a question as a participant question to gather information about multiple participants at a single session. These participant questions display on a survey once for each person who has a participant role you choose. For example, if a session is offered at different times with different presenters, you can ask the same question about each presenter to gather feedback about each one individually. (For more information, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

## Creating or Modifying Surveys

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You can use surveys to gather many types of attendee opinions about your event. There are no default surveys in the system; you must create all of the surveys you want to use. When you create certain types of surveys, you can use custom fields to define the attendees who can access the survey. You can modify surveys if necessary, or delete them if you no longer want to use them.

This section explains these tasks:

- [Setting Up a Survey](#)
- [Previewing a Survey](#)
- [Modifying a Survey](#)
- [Deleting a Survey](#)

### Setting Up a Survey

When you set up a survey, you first create the survey and then add the questions. During creation, you identify the type of survey you are creating and add a header, a footer, and a thank-you paragraph. For conference and session profile surveys, you can use custom fields to specify who can see the survey.

You can have the following types of questions in a survey:

- Text box
- Text area
- Single response
- Drop-down list
- Multiple response
- Multiple text box
- Scale
- Scale matrix

For more information about survey questions, see [Overview of Survey Question Types](#) on page 11 and [Adding Questions to a Survey](#) on page 17.

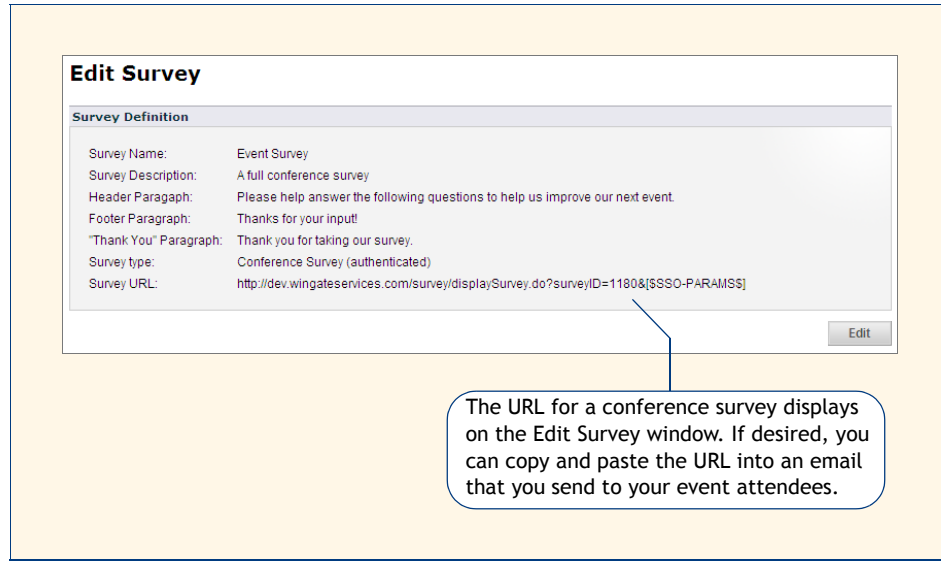
You can require users to answer any question on your survey before they can continue to the next question. If desired, you can divide your survey into sections using headings.

This section explains these tasks:

- [Creating a Survey](#)
- [Adding Questions to a Survey](#)

## Creating a Survey

The basic steps for creating a survey are the same for all survey types. You can begin creating a survey and come back to finish it at another time. When you create a conference-type survey, the system automatically assigns a URL where the survey can be found. If desired, you can send this link to users via email.



You determine the order in which surveys display for attendees, and for administrators in the Admin Tool. However, you can change the display order of your surveys at any time. (For more information, see [Choosing Survey Display Orders](#) on page 39.)

### Before You Begin

You may want to organize a list of the surveys you plan to create before you begin creating them in the Admin Tool. This can help you decide on a display order for all surveys.

### To create a survey

1. On the top menu bar, do one of the following:
  - Choose **Surveys > Add New**.
  - Choose **Surveys > List** to display the Survey Builder Home page. Then click **Create a New Survey**.

The Create a New Survey page displays.

**Create a New Survey**

Survey Name \*

Code

Survey Type: \* Conference Survey ▼

Anonymous Survey

Survey Description \*

Header Paragraph

Footer Paragraph

"Thank You" Paragraph

Display Order

Survey Rules To modify custom fields [click here](#)

Cancel Create

2. In the **Survey Name** field, enter a name for your survey. This name displays in the survey list in the Admin Tool and on the top of your survey.
3. If desired, enter a unique code for this custom field in the **Code** field. This code helps identify this custom field if it is copied into another event or imported into an external database. The code becomes read-only after it is saved.
4. From the **Survey Type** drop-down list, choose the type of survey you want to create.
5. Do one of the following, if necessary:
  - For a conference survey, if you want to let users submit the survey anonymously, mark the **Anonymous Survey** box; otherwise, leave the box unmarked.

#### Note

To make a survey truly anonymous, you must mark the Anonymous Survey box and send the generated link to attendees via email.

- For a session type survey, mark the session types about which you want feedback.
  - For a session survey, choose the IDs of the sessions about which you want feedback. (Hold down the CTRL key to choose multiple fields.) This lets you use the same survey for all sessions with the same theme, such as sessions about network security.
6. In the **Survey Description** field, enter a short description of the survey. This description displays only in the Survey definition section of the Edit Survey page.

7. In the **Header Paragraph** field, enter the header text that you want to display at the top of your survey. This text displays under the survey name.
8. In the **Footer Paragraph** field, enter a footer for your survey. This text displays at the bottom of your survey.
9. In the **“Thank You” Paragraph** field, enter information to display after the attendee submits the survey. For session surveys, this text displays under the link to the attendee view of the survey.
10. If desired, choose a display order for your survey. This determines the order in which the survey will display to attendees.

**Note**

You can also set the order in which surveys display to administrators. (For more information, see [Choosing a Survey Display Order for the Admin Tool](#) on page 40.)

11. For conference and session profile surveys, in the **Survey Rules** section, choose who can view the survey. (For more information, see [Using Custom Fields to Limit Who can View a Survey](#) on page 34.)

**Note**

If you make a conference survey anonymous, you cannot use survey rules to limit who can view the survey. All registered attendees can view anonymous surveys.

12. Click **Create**.  
The Edit Survey page displays.
13. Continue with the next task, [Adding Questions to a Survey](#).

## Adding Questions to a Survey

After you create your survey, you add the questions that you want attendees to answer. (For more information about the types of questions you can use, see [Overview of Survey Question Types](#) on page 11.) If desired, you can use headings to divide your survey questions into sections.

You can require users to answer any question on your survey before they can continue to the next question. You can also begin creating a survey and come back to finish it at another time.

If you are adding a question to a session, session type, or session profile survey, you can designate the question as a participant question. A participant question displays on a survey once for each person who has a certain participant role. For example, if a workshop has two speakers, you can ask the same question twice to gather feedback about each speaker separately. (For more information, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

### To add questions to a survey

1. Do one of the following:
  - Create a survey. (For instructions, see [Creating a Survey](#) on page 14.)
  - If you have already created a survey, choose **Surveys > List** from the top menu bar. When the Survey Builder Home page displays, click the name of the survey to which you want to add questions.

The Edit Survey page displays.










2. In the **Survey Questions** section of the page, click **Add**.

The Add Survey Question page displays.

### Add Survey Question

Choose a Question Type


Select the type of question you would like to add:

<input type="radio"/>  Section Heading	<input type="radio"/>  Multiple Response
<input type="radio"/>  Text Box	<input type="radio"/>  Scale
<input type="radio"/>  Text Area	<input type="radio"/>  Scale Matrix
<input type="radio"/>  Single Response	<input type="radio"/>  Multiple Textbox
<input type="radio"/>  Drop-down List	

For more information on question types, [see help](#).

3. Choose the element you would like to add.

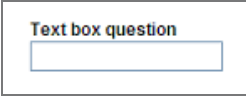
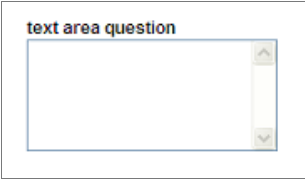
#### Note


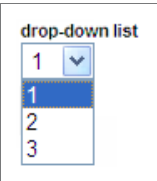
To view an example of each element, hover the mouse pointer over the preview icon (  ) for that element.

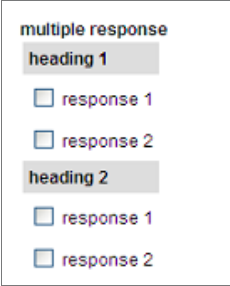
4. Click **Continue**.

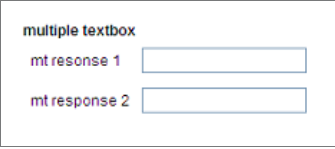
The Create/Edit Question page for the element you chose displays.

5. Complete the appropriate steps to create the element you chose.

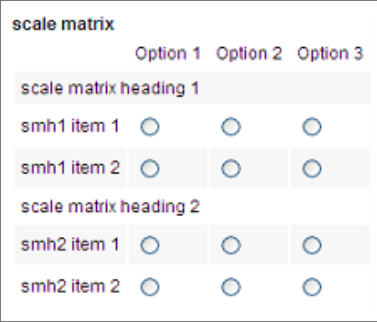
For this element	Complete these steps
<p><b>Section Heading</b></p>	<p>1. In the <b>Heading Text</b> field, enter the text that you want to display as a section heading on your survey. If you want to use multiple sections, create a heading for each section.</p> <p>2. Click <b>Submit</b>.</p>
<p><b>Text Box</b></p> 	<p>1. Complete these fields to create a text box question:</p> <ul style="list-style-type: none"> <li>• <b>Question.</b> Enter the text of the question you are adding.</li> <li>• <b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li>• <b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li>• <b>Is this a numeric field?</b> Mark <b>Yes</b> if the user should enter numerals.</li> <li>• <b>Field Size.</b> If desired, change the field width by changing the default.</li> <li>• <b>Maximum Characters.</b> If desired, change the maximum number of characters (up to 4000) that a user can enter by changing the default. The default maximum is 20 characters.</li> </ul> <p><b>NOTE:</b> If you enter a maximum number of characters that is more than the designated field size, the entry will scroll in the text box until the maximum number of characters is reached.</p> <p>2. Click <b>Submit</b>.</p>
<p><b>Text Area</b></p> 	<p>1. Complete these fields to create a text area question:</p> <ul style="list-style-type: none"> <li>• <b>Question.</b> Enter the text of the question you are adding.</li> <li>• <b>Maximum Characters.</b> If desired, change the maximum number of characters (up to 4000) that a user can enter by changing the default. The default maximum is 200 characters.</li> <li>• <b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li>• <b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> </ul> <p>2. Click <b>Submit</b>.</p>

For this element	Complete these steps
<p><b>Single Response</b></p> 	<ol style="list-style-type: none"> <li>Complete these fields to create a single response question: <ul style="list-style-type: none"> <li><b>Question.</b> Enter the text of the question you are adding.</li> <li><b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li><b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li><b>Will you have an “Other” box?</b> If you want to allow users to add a free-text response (other than the choices you give them), mark <b>Yes</b>.</li> <li><b>Response.</b> Enter the text that should display as an answer choice and click <b>Add response</b>. Repeat this step for each answer choice you want to have for this question.</li> <li><b>Text to display.</b> If you chose to add an “Other” box, enter the text you want to display beside the Other field.</li> </ul> </li> <li>If necessary, after you have created all the responses, use the up- and down-arrows next to each response in the <b>Order</b> column of the <b>Response List</b> section to adjust the display order of each response.</li> <li>Click <b>Submit</b>.</li> </ol>
<p><b>Drop-down List</b></p> 	<ol style="list-style-type: none"> <li>Complete these fields to create a drop-down list question. <ul style="list-style-type: none"> <li><b>Question.</b> Enter the text of the question you are adding.</li> <li><b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li><b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li><b>Will you have an “Other” box?</b> If you want to allow users to add a free-text response (other than the choices you give them), mark <b>Yes</b>.</li> <li><b>Response.</b> Enter the text that should display as an answer choice and click <b>Add response</b>. Repeat this step for each answer choice you want to have for this question. If necessary, after you have created all the responses, use the up- and down-arrows next to each response in the <b>Order</b> column of the <b>Response List</b> section to adjust the display order of each response.</li> <li><b>Text to display.</b> If you chose to add an “Other” box, enter the text you want to display beside the Other field.</li> </ul> </li> <li>Click <b>Submit</b>.</li> </ol>

For this element	Complete these steps
<p><b>Multiple Response</b></p> 	<ol style="list-style-type: none"> <li>Complete these fields to create a multiple response question. <ul style="list-style-type: none"> <li><b>Question.</b> Enter the text of the question you are adding.</li> <li><b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li><b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li><b>Will you have an “Other” box?</b> If you want to allow users to add a free-text response (other than the choices you give them), mark <b>Yes</b>.</li> <li><b>Response.</b> Do one of the following: <ul style="list-style-type: none"> <li>- To add a heading, enter the text that should display as a heading over one or more response options and click <b>Add Heading</b>.</li> <li>- To add a response choice, enter the text that should display as a response choice and click <b>Add response</b>.</li> </ul> Repeat this step for each response or heading you want to have for this question. If necessary, after you have created all the responses, use the up- and down-arrows next to each response in the <b>Order</b> column of the <b>Response List</b> section to adjust the display order of each response.</li> <li><b>Text to display.</b> If you chose to add an “Other” box, enter the text you want to display beside the Other field.</li> </ul> </li> <li>Click <b>Submit</b>.</li> </ol>

For this element	Complete these steps
<p><b>Multiple Text Box</b></p> 	<ol style="list-style-type: none"><li>1. Complete these fields to create a multiple text box question.<ul style="list-style-type: none"><li>• <b>Question.</b> Enter the text of the question you are adding.</li><li>• <b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li><li>• <b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li><li>• <b>Is this a numeric field?</b> Mark <b>Yes</b> if the user should enter numerals.</li><li>• <b>If numeric, should the numbers add up to one hundred?</b> If the questions will have numeric answers and you want to require the answers to have a sum of 100, mark <b>Yes</b>.</li><li>• <b>Field Size.</b> If desired, change the field width by changing the default.</li><li>• <b>Maximum Characters.</b> If desired, change the maximum number of characters (up to 4000) that can be entered by changing the default. The default maximum is 20 characters.</li></ul><p><b>NOTE:</b> If you enter a maximum number of characters that is more than the designated field size, the entry will scroll in the text box until the maximum number of characters is reached.</p><ul style="list-style-type: none"><li>• <b>Response.</b> Enter the text that should display next to the first text box and click <b>Add response</b>. Repeat this step for each text box you want to have for this question.</li></ul></li><li>2. If necessary, after you have created all the responses, use the up- and down-arrows next to each response in the <b>Order</b> column of the <b>Response List</b> section to adjust the display order of each response.</li><li>3. Click <b>Submit</b>.</li></ol>

For this element	Complete these steps
<p><b>Scale</b></p> <div data-bbox="159 317 342 516" style="border: 1px solid black; padding: 5px;"> <p>scale questions</p> <p><input type="radio"/> Option 1</p> <p><input type="radio"/> Option 2</p> <p><input type="radio"/> Option 3</p> <p><input type="radio"/> Option 4</p> <p><input type="radio"/> Option 5</p> </div>	<ol style="list-style-type: none"> <li>Complete these fields to create a scale question. <ul style="list-style-type: none"> <li><b>Question.</b> Enter the text of the question you are adding.</li> <li><b>Scale Size.</b> From the drop-down list, choose the number of responses (up to 10) that you want to use in your scale.</li> <li><b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li><b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li><b>Will you have a “Not Applicable” response?</b> If you want to offer a “Not Applicable” choice to users for this question, mark <b>Yes</b>. The “not Applicable” response has a value of 0 (zero).</li> <li><b>Response.</b> In each field, enter the text that should display next to each scale value. Make sure to enter the responses in ranking order. (For example, you could use these values and responses: 1 = I liked it; 2 = It was OK; 3 = I hated it.) If you chose to offer a “Not Applicable” choice, you can edit the display text for that choice.</li> <li><b>Should the values on this question be reversed?</b> To reverse the values of the scale, mark <b>Yes</b>. (For example, if you reversed the values on the three responses listed earlier, they would change to 1 = I hated it; 2 = It was OK; 3 = I liked it.)</li> </ul> </li> <li>Click <b>Submit</b>.</li> </ol>

For this element	Complete these steps
<p><b>Scale Matrix</b></p>  <p>The screenshot shows a configuration window for a scale matrix. At the top, it says 'scale matrix'. Below that, there are three columns labeled 'Option 1', 'Option 2', and 'Option 3'. The first section is 'scale matrix heading 1', with two rows: 'smh1 item 1' and 'smh1 item 2'. Each row has three radio buttons, one under each option column. The second section is 'scale matrix heading 2', with two rows: 'smh2 item 1' and 'smh2 item 2', also each with three radio buttons under the option columns.</p>	<ol style="list-style-type: none"> <li>Complete these fields to create a scale matrix question. <ul style="list-style-type: none"> <li><b>Question.</b> Enter the text of the question you are adding.</li> <li><b>Scale Size.</b> From the drop-down list, choose the number of responses (up to 10) that you want to use in your scale.</li> <li><b>Is this a required question?</b> Mark <b>Yes</b> to require an answer for this question before the user can continue; otherwise, mark <b>No</b>.</li> <li><b>Is this a participant question?</b> If this is a session, session type, or session profile survey and you want this question to be repeated for certain participant roles, mark <b>Yes</b>. (For more information, see <a href="#">Setting Up Session Surveys for Multiple Speakers</a> on page 24.)</li> <li><b>Will you have a “Not Applicable” response?</b> If you want to offer a “Not Applicable” choice to users for this question, mark <b>Yes</b>. The “not Applicable” response has a value of 0 (zero).</li> <li><b>Response.</b> In each field, enter the text that should display next to each scale value. Make sure to enter the responses in ranking order. (For example, you could use these values and responses: 1 = I liked it; 2 = It was OK; 3 = I hated it.) If you chose to offer a “Not Applicable” choice, you can edit the display text for that choice.</li> <li><b>Should the values on this question be reversed?</b> To reverse the values of the scale, mark <b>Yes</b>. (For example, if you reversed the values on the three responses listed earlier, they would change to 1 = I hated it; 2 = It was OK; 3 = I liked it.)</li> <li><b>Item Name.</b> Do one of the following: <ul style="list-style-type: none"> <li>- To display a heading over one or more items to be rated, enter the heading text and click <b>Add Heading</b>.</li> <li>- To display items to be rated, enter text to describe an item and click <b>Add Item</b>.</li> </ul> Repeat this step for each item or heading you want to have for this question.</li> </ul> </li> <li>After you have created all the desired headings and items to be rated, use the up- and down-arrows next to each item in the <b>Order</b> column of the <b>Item Name</b> list to adjust the display order.</li> <li>Click <b>Submit</b>.</li> </ol>

The Edit Survey page displays.

- In the **Survey Questions** section, use the drop-down list in the **Display Order** column to adjust the display order of each question.
- When you are satisfied with the display order, click **Save Display Order**.
- If desired, click **Preview Survey** to review how your survey will display to users.
- When you are finished working with your survey, click **Finished**.

## Setting Up Session Surveys for Multiple Speakers

Some sessions may involve multiple participants about whom you want to gather information. (For example, a workshop might have three presenters, or a breakout might be offered twice with a different speaker each time.) You can designate session survey questions as participant questions to gather information about each participant of a session.

### Note

You can use participant questions on session surveys, session type surveys, and session profile surveys.

On a survey, participant questions display separately for each participant. Below is an example:

**Title:** Unified Computing API: What Developers Need to Know  
**Time:** Thursday, 9:00 AM - 10:00 AM  
**Speaker(s):** Roger Oliphar, Ken Halsted

\* 1. Please rate the session on the following:

	Excellent	Above Average	Average	Below Average	Poor
Session Overall	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relevance to your business / job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Roger Oliphar**

\* 2. Please rate the Speaker on the following:

	Excellent	Above Average	Average	Below Average	Poor
Presentation Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Ken Halsted**

\* 3. Please rate the Speaker on the following:

	Excellent	Above Average	Average	Below Average	Poor
Presentation Skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Additional Feedback: (max 4000 characters)

You designate the roles for which participant questions display. (For example, you can choose to display participant questions for the roles of Speaker and Presenter. Then any sessions with multiple speakers or presenters would display session questions separately for every speaker or presenter.)

**Note**

If participant survey questions are used, a session has multiple speakers, and you choose to show speaker evaluations on the SRC home page, speakers using the SRC will see the results from any questions that are not participant-specific, but only their own results from the participant questions.

**To set up session surveys for multiple speakers**

1. On the top menu bar, choose **Setup > Content > Catalog & Personal Scheduler > Survey Prefs.**

The Survey Preferences page displays.

2. Choose the roles for which participant questions will display from the **Session Roles that need to be displayed on Survey Participant Questions** drop-down box. To choose more than one role, hold down the Ctrl key while you click.
3. Create a session survey whose questions you want use to gather information about multiple participants.

(For instructions, see [Creating a Survey](#) on page 14.)

4. When you add questions to the survey, for any question that you want to use to gather information about multiple participants, be sure to mark **Yes** for **Is this a participant Question?**

(For more information on survey questions, see [Adding Questions to a Survey](#) on page 17.)

## Previewing a Survey

You can preview a survey at any time. This lets you view the information you have placed in a survey and the questions you have created before you publish the survey.

### To preview a survey

1. Choose **Surveys > List** to display the Survey Builder Home page.
2. Click the name of the survey you want to preview.
3. Click **Preview Survey**.

The survey displays in a separate browser window.

4. When you have finished previewing the survey, click **Close Window**.

## Modifying a Survey

You can change a survey before it has been published, or after it has been published if no one has taken it yet.

### Warning

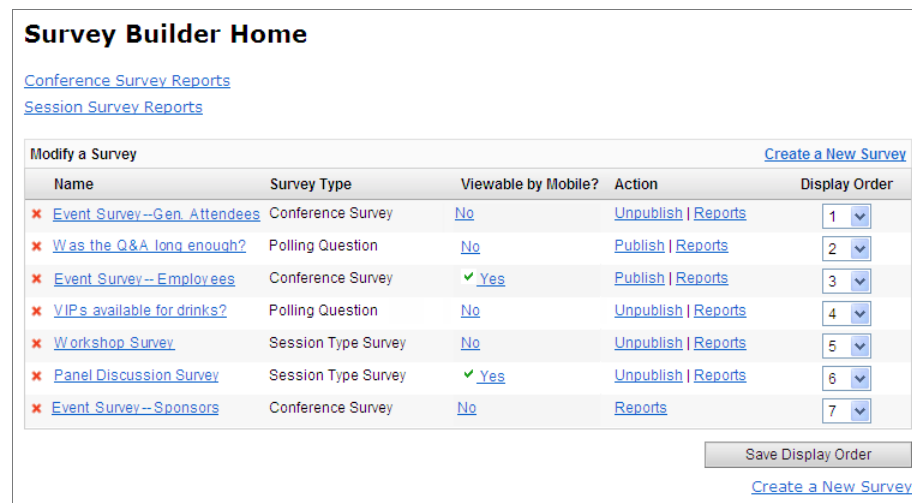
Changing a survey after publication can result in inaccurate data reporting. This is because any responses given to any questions you add or alter will be reported only for the period during which they were available.

(For example, if you create a survey with three questions, answers to those questions will be reported correctly up to the time you change the survey. After changes, the question sequence may be different, the questions asked are different, the percentage of questions answered in a certain way may change because the answer options have changed, and so forth. This will alter the accuracy of your data.)

### To modify a survey

1. On the top menu bar, choose **Surveys > List**.

The Survey Builder Home page displays.



**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

[Modify a Survey](#) [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
<a href="#">Event Survey--Gen Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1
<a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2
<a href="#">Event Survey--Employees</a>	Conference Survey	✓ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3
<a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4
<a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5
<a href="#">Panel Discussion Survey</a>	Session Type Survey	✓ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6
<a href="#">Event Survey--Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7

[Create a New Survey](#)

2. Click the name of the survey you want to edit.

The Edit Survey page displays.

3. Do any of the following:
  - To edit the survey, click **Edit** in the **Survey Definition** section and complete the fields as described in [Creating a Survey](#) on page 14.
  - To edit a question, click **Edit** next to the question you want to edit and complete the fields as described in [Adding Questions to a Survey](#) on page 17.

- To delete a question, click **Delete** next to the question you want to delete.

**Note**

Deleting a question removes all data collected for the question.

4. In the **Survey Questions** section, use the drop-down list in the **Display Order** column to adjust the display order of each question.
5. When you are satisfied with the display order, click **Save Display Order**.
6. If desired, click **Preview Survey** to review how your survey will display to users.
7. When you are finished working with your survey, click **Finished**.

**Note**

You may need to refresh the cache before any changes display. (For instructions, see [Choosing Survey Display Orders](#) on page 39.)

## Deleting a Survey

You can delete a survey when it is no longer useful to you.

**Warning**

Deleting a survey removes all data collected for the survey.

### To delete a survey

1. On the top menu bar, choose **Surveys > List**.

The Survey Builder Home page displays.

**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
✘ <a href="#">Event Survey--Gen Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1
✘ <a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2
✘ <a href="#">Event Survey-- Employees</a>	Conference Survey	✓ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3
✘ <a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4
✘ <a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5
✘ <a href="#">Panel Discussion Survey</a>	Session Type Survey	✓ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6
✘ <a href="#">Event Survey-- Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7

[Create a New Survey](#)

2. Click the red **X** beside the name of the survey you want to delete.

## Displaying a Survey

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You determine which attendees have the rights to take your surveys. You do this by setting survey preferences and by using custom fields. Survey preferences also determine the access points for published surveys. If you choose, attendees can access surveys after logging in to the Scheduler from any browser, or on-site through an on-site Internet kiosk. Typically, attendees scan their badge bar codes at on-site kiosks to display the surveys they can take.

You can choose to show session surveys to only event attendees who have attended those sessions. If you do this, before an attendee can see a specific session survey, the attendee's record must show that he or she attended the session. You can change the attendance status for an event attendee.

You can also determine the order in which surveys display to users and in the Admin Tool.

### Note

The system automatically assigns a web address to conference-type surveys. You can choose to send these web addresses as links to users via email, if desired. The address is created automatically when you create a conference survey. (For more information, see [Creating a Survey](#) on page 14.)

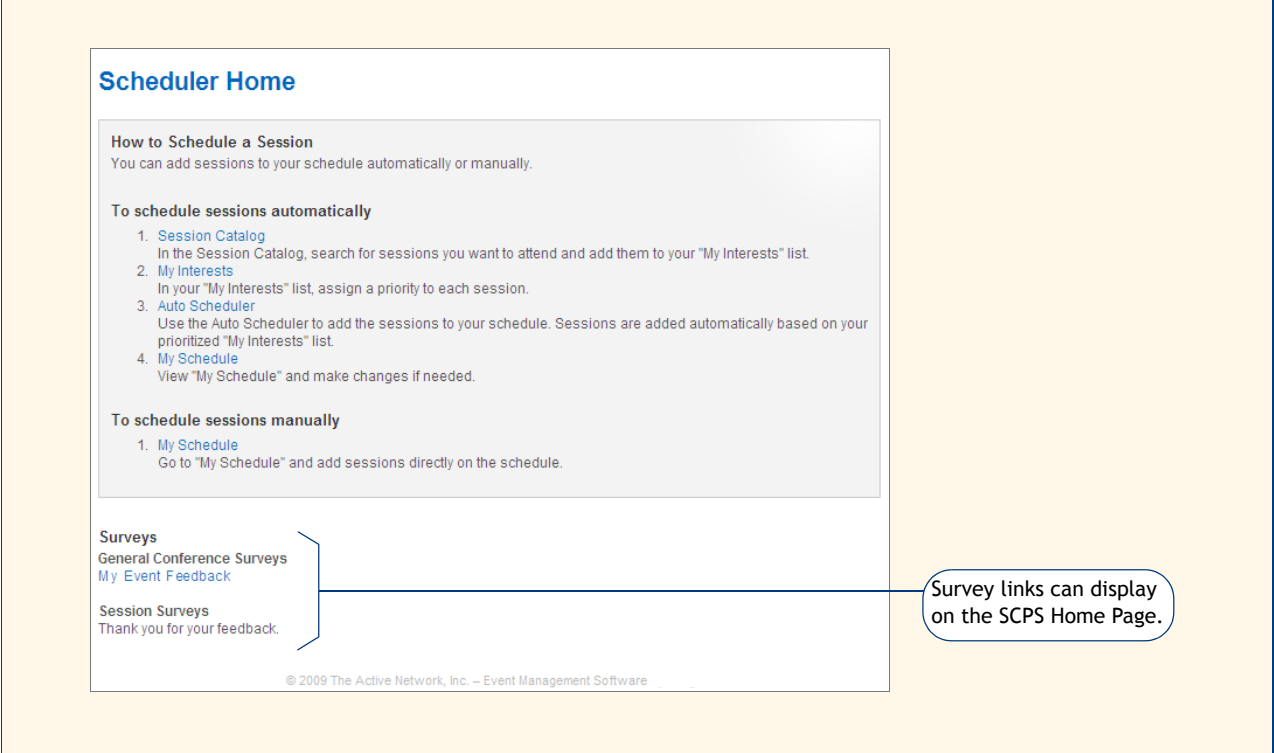
If you use ActiveEvents Connect and Cyber Cafe, published surveys also display on the Cyber Cafe Home page, which can be set as the home page for your on-site kiosks. Cyber Cafe can also be accessed by any registered attendee from any browser.

This section explains these tasks:

- [Choosing Survey Preferences](#)
- [Using Custom Fields to Limit Who can View a Survey](#)
- [Allowing Access to Session Surveys through Attendance Status](#)
- [Publishing or Unpublishing a Survey](#)
- [Choosing Survey Display Orders](#)
- [Refreshing the Cache](#)

## Choosing Survey Preferences

If you use the Session Catalog and Personal Scheduler (SCPS), you can set preferences that determine where survey links display in the SCPS, and who can access the surveys. You can display conference survey links on the Scheduler Home page. You can choose whether session survey links display on the Scheduler Home page or on the Session Catalog page for the session, or both.



The screenshot shows the "Scheduler Home" page. It features a main content area with instructions on "How to Schedule a Session" and a sidebar menu. A callout box points to the "Surveys" section in the sidebar, indicating that survey links can display on the SCPS Home Page.

**Scheduler Home**

**How to Schedule a Session**  
You can add sessions to your schedule automatically or manually.

**To schedule sessions automatically**

- [Session Catalog](#)  
In the Session Catalog, search for sessions you want to attend and add them to your "My Interests" list.
- [My Interests](#)  
In your "My Interests" list, assign a priority to each session.
- [Auto Scheduler](#)  
Use the Auto Scheduler to add the sessions to your schedule. Sessions are added automatically based on your prioritized "My Interests" list.
- [My Schedule](#)  
View "My Schedule" and make changes if needed.

**To schedule sessions manually**

- [My Schedule](#)  
Go to "My Schedule" and add sessions directly on the schedule.

**Surveys**

- General Conference Surveys
- My Event Feedback

**Session Surveys**  
Thank you for your feedback.

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Survey links can display on the SCPS Home Page.

All	Type	Technical Level	Day	My Interests	Suggested Sessions
▼	Session ID	Title	Type	Status	
1009	Take Survey	Troubleshooting EIGRP	Panel Discussion		Add To My Interests
1021	Take Survey	Deploying Network-Based Intrusion Prevention Systems	Panel Discussion		Add To My Interests
1027	Take Survey	IPv6 Security Threats and Mitigations	Panel Discussion		In My Interests
1033	Take Survey	Multilayer Campus Architectures and Design Principles	Panel Discussion		Add To My Interests
1039	Take Survey	Guest and Partner Access: A Case for Network Virtualization	Panel Discussion		Add To My Interests
1045	Take Survey	New Developments in BGP	Panel Discussion		Add To My Interests
1051	Take Survey	IT Insight Session: Benefits of a Contact Center in VoIP Deployments	Panel Discussion		Add To My Interests
1057	Take Survey	Optical Interfaces for Ethernet on Switches and Routers	Panel Discussion		Add To My Interests
1063	Take Survey	Enterprise IPv6 Deployment	Panel Discussion		Add To My Interests
1069	Take Survey	Large-Scale IPSec Aggregation Networks	Panel Discussion		Add To My Interests
1075	Take Survey	Data Center Back-End Infrastructure: Solutions for Disaster Recovery	Panel Discussion		Add To My Interests
1081	Take Survey	Implementing MPLS in Service Provider Networks	Panel Discussion		Add To My Interests

Session survey links can display on the Session Catalog beside each survey.

You can choose whether session surveys display for all users, or for only users who have registered for the session to which the survey pertains.

You can also choose to display session surveys to only those users who are recorded as having attended a session. If you use Session Access Control (SAC), this information is recorded automatically. However, you can change an attendee's record to show that he or she attended a session. (For more information, see [Allowing Access to Session Surveys through Attendance Status](#) on page 35.)

#### Note

For additional ways to limit who can view conference or session profile surveys, see [Using Custom Fields to Limit Who can View a Survey](#) on page 34.

Survey preferences also let you choose whether speakers can view session survey results through the Speaker Resource Center (SRC), and the roles for which participant questions are repeated on session surveys.

### To choose survey preferences

1. On the top menu bar, choose **Setup > Content > Catalog & Personal Scheduler > Survey Prefs.**

The Survey Preferences page displays.

**Survey Preferences**  
Use these preferences to specify rules for how the surveys should be used.

Show Conference Surveys on Scheduler Home

Show Session Surveys on Scheduler Home

[Show Session Survey Links on Catalog](#)

Show Session Surveys for All Users

Show Session Surveys for Registered Users

Show Session Surveys for Attended Users

[SRC - Show Speaker Evaluation on SRC home](#)

Session Roles that need to be displayed on Survey Participant Questions

Speaker  
Owner  
Admin Contact  
Meeting Host  
Meeting Participant

Update

2. To display conference survey links on the Scheduler Home page, mark the **Show Conference Surveys on Scheduler Home** box.
3. To display session survey links on the Scheduler Home page, mark the **Show Session Surveys on Scheduler Home** box.
4. To display session survey links on the Session Catalog page, mark the **Show Session Survey Links on Catalog** box.
5. If you chose to display session surveys, determine which users can see the surveys:
  - To let all users see any surveys for all sessions, mark the **Show Session Surveys for All Users** box.
  - To let users see surveys only for those sessions for which they have registered, mark the **Show Session Surveys for Registered Users** box.
  - If you want to let users see surveys only for the sessions for which the system has recorded their attendance, mark the **Show Session Surveys for Attended Users**. (For more information about recording attendance in the system, see [Allowing Access to Session Surveys through Attendance Status](#) on page 35.)

If you choose this option, session attendees can see session surveys only after the scheduled session time has past.

6. To display speaker evaluations on the Speaker Resource Center home page, mark the **SRC - Show Speaker Evaluation on SRC home** box.

**Note**

If you choose to show speaker evaluations on the SRC home page, a session has multiple speakers, and participant survey questions are used, speakers will see the results from any questions that are not participant-specific and only their own results from the participant questions. (For more information about participant questions, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

7. For session surveys, choose the roles for which participant questions will apply from the **Session Roles that need to be displayed on Survey Participant Questions** drop-down box. To choose more than one role, hold down the Ctrl key while you click.  
  
(For more information, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)
8. When you finish setting survey preferences, click **Update**.

## Using Custom Fields to Limit Who can View a Survey

You can use custom fields to limit the types of attendees who can view conference surveys and session profile surveys. For example, the session profile survey lets you associate a survey with sessions that have a certain custom field, such as a secondary session type or session track identification. Once you apply a custom field, any additional surveys of that type that you create will have the field unless you change the survey rules.

### Note

If you make a conference survey anonymous, you cannot use survey rules to limit who can view the survey. All registered attendees can view anonymous surveys.

### Before You Begin

Typically, you use existing custom fields when limiting who can view a survey. However, you can create custom fields specifically for limiting who can view a survey, if desired. Once you determine which custom field you want to use to limit the survey display (and create the field, if necessary), you must add it to both the survey (as described in this task) and the user records of the attendees who should have the option to take the survey. (For more information about custom fields, see the “Custom Fields” chapter in the *Administrator Guide*. If you need additional help, contact your Project Manager.)

### To use custom fields to limit who can view a survey

1. Create a conference or session profile survey as described in steps 1 through 11 of [Creating a Survey](#) on page 14.
2. If the value that you want to use to limit who can view the survey does not display in the **Survey Rules** section, complete these steps to add the appropriate field

#### To add custom fields for survey rules

1. In the **Survey Rules** section, click **click here**.  
The Custom Field Locations—Survey Rules page displays.
  2. In the **Available Fields** list, choose the fields that you want to use to limit who can view the survey. (Hold down the CTRL key to choose multiple fields.)
  3. Click **Add** to move the fields to the Assigned Fields list.
  4. Click **Finish**.
3. In the **Survey Rules** section, mark the custom field values that an attendee record must have before that attendee can view the survey. (If no custom field values are marked, all attendees can view the survey.)
  4. Click **Create**.

## Allowing Access to Session Surveys through Attendance Status

If you choose to display session surveys to only those users who attend sessions, an event attendee must be marked in attendance at a session before he or she can take a survey about that session. If you use Session Access Control (SAC) at your event, attendees can scan their badge barcodes when they enter a session so that their attendance at that session is automatically recorded.

### Note

SAC also includes an on-site Force Session Attendance utility that lets you change attendance status on-site. This is helpful if an attendee was admitted to a classroom without successfully scanning in.

The utility lets you change a person's attended status for a specific session time so that she or he can take the associated survey. You do this by scanning the attendee's badge to display a list of sessions and times offered, and clicking the session for which you want to change the attendee's status. (For more information about the Force Session Attendance utility, talk to your Business Analyst.)

If you do not use SAC, you can still mark attendance at a session, as explained in the following tasks.

This section explains these tasks:

- [Changing Attendance Status from an Attendee Record](#)
- [Changing Attendance Status from the Session Attendance Report](#)

### Note

The person whose attendance you change may need to log out and back in before he or she can access the session survey.

## Changing Attendance Status from an Attendee Record

Individual attendee records can be changed to show attendance at a session in the Admin Tool. This is helpful if an attendee wants to take a survey but his or her attendance was not recorded. (If in the Survey Preferences you choose to show session surveys for attended users, session attendance is required before an attendee can take a session survey.)

### To change attendance status from an attendee record

1. Access the user record in the Admin Tool. (For instructions, see "Searching for Existing User Accounts" in the "User Accounts" chapter of the *Registration Guide*.)
2. From the left-navigation menu, choose **Sessions > Session Attendance**.

The Session Attendance page displays.

**Session Attendance**

[Add a Session](#) [Print View](#) [Export](#)

Total - 1						
COURSE NUMBER	TITLE	PRIORITY	TIME	DAY	REMOVE	
1075	Data Center Back-End Infrastructure: Solutions for Disaster Recovery		7:45	Saturday	<a href="#">Remove</a>	

3. Click the **Add a Session** link.

The Session Search dialog box displays.

**Session Search** [X]

Course Number:  Course Description:  Title:

4. Enter search criteria for the session you want to find.
5. Click **Search**.

A list of sessions meeting your criteria displays.

**Session Search** [X]

Course Number:  Course Description:  Title:

**Session Search Results**

Action	Session ID	Day	Start Time	Session Title
<a href="#">Add</a>	1026	Tuesday	09:00 AM	Understanding and Preventing Layer 2 Attacks
<a href="#">Add</a>	1056	Tuesday	12:00 PM	Implementing Data Center Services (Interop, Design, and Deployment)
<a href="#">Add</a>	1049	Tuesday	12:00 PM	Enterprise IP Multicast
<a href="#">Add</a>	1028	Tuesday	12:00 PM	Deploying 802.1X
<a href="#">Add</a>	1050	Tuesday	02:00 PM	Fibre Channel Storage Area Network Design
<a href="#">Add</a>	1036	Tuesday	02:00	Multicast Security

6. Locate the session the user attended and click **Add**.

## 7. Click **Done**.

The dialog box closes and returns you to the Session Attendance page, which displays the session you added to the user's attendance list.

Session Attendance						
<a href="#">Add a Session</a>		<a href="#">Print View</a> <a href="#">Export</a>				
Total - 1						
COURSE NUMBER	TITLE	PRIORITY	TIME	DAY	REMOVE	
1075	Data Center Back-End Infrastructure: Solutions for Disaster Recovery		7:45	Saturday	<a href="#">Remove</a>	
1036	Multicast Security		8:45	Saturday	<a href="#">Remove</a>	

### Note

If necessary, you can click **Remove** to remove a user from the Attended list.

## Changing Attendance Status from the Session Attendance Report

One of the many default reports that comes with the Conference system is the Session Attendance report. This report contains statistics about session attendance. If necessary, you can change session attendance status from this report so that attendees can take a session survey. This is helpful if a barcode scanner for a session malfunctioned, or if several attendees were not recorded as attending a specific session.

### To change attendance status from the Session Attendance report

1. From the top menu bar, choose **Reports > Schedule > Session Attendance**.

The Session Attendance report displays.

2. Find the session whose attendance you want to change.
3. Click the sum of registered users for that session.

The Attendees Registered page displays.

4. Click **Add** beside that attendee's name.

### Note

If necessary, you can click **Remove** beside an attendee's name to remove that attendee from the Attended list.

## Publishing or Unpublishing a Survey

A survey must contain questions and be published before attendees can view and take it. If a survey contains no questions, it does not display even if it is published. By default, all types of session surveys are published as soon as they are created. However, you must manually publish conference surveys before event attendees can view them.

### Note

The option to publish or unpublish a conference survey does not display if the survey is anonymous. Instead, the survey is automatically published.

The system automatically assigns a web address to conference-type surveys that becomes accessible after publication. Other surveys are accessed through links from specified places after they are published. (For more information, see [Choosing Survey Preferences](#) on page 30.) If you unpublish a survey, it is no longer viewable, and event attendees can no longer take it.

### To publish or unpublish a survey

1. On the top menu bar, choose **Surveys > List**.

The Survey Builder Home page displays.

**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
✘ <a href="#">Event Survey--Gen Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1
✘ <a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2
✘ <a href="#">Event Survey-- Employees</a>	Conference Survey	✔ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3
✘ <a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4
✘ <a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5
✘ <a href="#">Panel Discussion Survey</a>	Session Type Survey	✔ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6
✘ <a href="#">Event Survey--Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7

[Create a New Survey](#)

2. In the list of surveys, find the survey you want to publish or unpublish.
3. Do one of the following:
  - To publish a survey, click **Publish**.
  - To hide a survey, click **Unpublish**.
4. If you use ActiveEvents Mobile and want to let attendees access the survey from a mobile device, click **No** in the **Viewable by Mobile** column.

The “No” changes to “Yes” to show that the survey is viewable on mobile devices.

5. To make the survey inaccessible again, click **Yes**.

(For more information about ActiveEvents Mobile, see the *ActiveEvents Mobile Guide*.)

**Note**

You may need to refresh the cache before any changes take effect. (For instructions, see [Refreshing the Cache](#) on page 41.)

## Choosing Survey Display Orders

You can set the order in which surveys display to attendees. You can also determine the order in which surveys display in the Admin Tool.

**Note**

The display orders you set here do not affect the way session surveys display in the Catalog. Catalog display is determined by the sorting method the user applies to the Catalog entries.

This section explains these tasks:

- [Choosing a Survey Display Order for Attendees](#)
- [Choosing a Survey Display Order for the Admin Tool](#)

### Choosing a Survey Display Order for Attendees

You can choose the order in which surveys display on the Scheduler Home page to attendees. For example, you can group surveys in alphabetical order. You could also choose to list session surveys by session date or time.

Because conference surveys and session surveys display to attendees in separate lists, you can choose different orders for conference and session surveys. For example, you can list whole-event surveys alphabetically, while at the same time listing session surveys by ID.

**Note**

You may have chosen an attendee display order when you created your survey. You can change the attendee display order at any time, but you must reorder all the surveys that you want to display together to assure that they display correctly.

#### Before You Begin

You may want to organize a list of the surveys you plan to create before you begin creating them. This can help you decide on a display order for all surveys.

**To choose a survey display order for attendees**

1. Choose **Surveys > List**.

The Survey Builder Home page displays.

2. Click the name of the survey whose display order you want to change.

The Edit Survey page displays.

3. Click **Edit**.

The Edit Survey Definition page displays.

4. In the **Display Order** field, enter a display number for your survey.

5. Click **Finished**.

The Edit Survey page displays.

6. Click **Finished** to return to the Survey Builder Home page.

## Choosing a Survey Display Order for the Admin Tool

You can determine the order in which your surveys display in the Admin Tool. For example, you can group all surveys of the same type.

**To choose a survey display order for the Admin Tool**

1. On the top menu bar, choose **Surveys > List**.

The Survey Builder Home page displays.

**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
<a href="#">Event Survey--Gen Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1
<a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2
<a href="#">Event Survey-- Employees</a>	Conference Survey	✓ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3
<a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4
<a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5
<a href="#">Panel Discussion Survey</a>	Session Type Survey	✓ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6
<a href="#">Event Survey-- Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7

[Create a New Survey](#)

2. Use the drop-down number lists in the **Display Order** column to organize the surveys in the order in which you want them to display in the Admin Tool.
3. When you are satisfied with the display order, click **Save Display Order**.

## Refreshing the Cache

After you add or update a survey, you may need to refresh the cache before the survey will display according to your survey preferences.

### To refresh the cache

1. On the top menu bar, choose **Setup > General > Cache Control**.
2. Click **Refresh Event Cache**.

## Working with Survey Reports

---

You can learn who has or has not taken a specific survey. You can also view reports that give you results and statistics about the surveys you have created for your event.

Some reports offer additional options for viewing or manipulating data. You may be able to:

- Have the system generate a printer-friendly view of the report.
- Export the data as an Excel spreadsheet.
- Add the data to a worklist, where you can do bulk editing.

(For more information on using worklists, see the user guide for the type of data you are adding to a worklist: for attendee or exhibitor participant data, see “Using Worklists” in the “User Accounts” chapter of the *Registration Guide*; for session data, see “Managing Session Worklists” in the “Session Records” chapter of the *Content Guide*.)

- Add the report to your list of reports and your Dashboard.
- Archive the report results.
- View archived report results, or compare two archived reports.

If any of these options are available, a link displays on the report.

This section explains these tasks:

- [Viewing Who Has or Has Not Taken a Survey](#)
- [Viewing Survey Reports](#)
- [View Additional Survey Details](#)

## Viewing Who Has or Has Not Taken a Survey

You can view the name, email address, and company of each person who has or has not taken a specific survey.

### To view who has or has not taken a survey

1. From the top menu bar, choose **Reports > Survey > Survey – Has Taken or Has Not Taken**.

The Survey – Has Taken or Has Not Taken report displays.

2. From the **Which Survey** drop-down list, choose the survey whose data you want to display.
3. From the **Taken or Not** drop-down list, choose whether you want to view users who *have* taken the survey or users who *have not* taken the survey.
4. For any type of session survey, do the following:

#### To choose the session whose survey takers you want to view

1. From the **Which Session** drop-down list, choose the ID of the session whose data you want to display.
2. Click **Submit**.  
If the session was offered multiple times, the Which Session Time field displays.
3. From the **Which Session Time** drop-down list, choose the time of the session whose data you want to display. Alternatively, you can leave the default (-any-) in the field to display all users who meet the taken or not criterion you chose in step 3.

5. Click **Submit**.

## Viewing Survey Reports

You can view the results of your conference and session surveys. All survey reports display the number and percentage of times each response on a survey was received, and the total number of responses to each question. Text response questions display a link that, when clicked, displays the responses entered. Ratings-type questions also show the average rating received.

If a session was offered multiple times, session survey reports break down the statistics to show responses for each time the session was offered. If a session had multiple speakers and you set up participant questions, reports display results for each participant. (For more information on participant questions, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

This section explains these tasks:

- [Viewing Conference Survey Reports](#)
- [Viewing Session Survey Reports](#)

## Viewing Conference Survey Reports

Conference survey reports display statistics and attendee responses to surveys about your event as a whole.

### To view conference survey reports

1. From the top menu bar, choose **Reports > Survey > View Survey List**.

The Survey Builder Home page displays.

### Survey Builder Home

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
<a href="#">Event Survey--Gen Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1
<a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2
<a href="#">Event Survey--Employees</a>	Conference Survey	✓ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3
<a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4
<a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5
<a href="#">Panel Discussion Survey</a>	Session Type Survey	✓ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6
<a href="#">Event Survey--Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7

[Save Display Order](#)

[Create a New Survey](#)

### Note

You can also access the Survey Builder Home page by choosing **Surveys > List**.

2. To view reports about surveys that give information on your entire event, click the **Conference Survey Reports** link.

The list of Conference Evaluations displays.

3. Click the name of the survey you want to view.
4. To view answers to any text questions, click the response link for that question.
5. If attendees are still able to take the survey and you want to be sure to view the most current data, click **Refresh Report**.
6. When you have finished viewing the survey statistics, click the **Close Window** link.
7. Confirm that you want to close the window.

## Viewing Session Survey Reports

Session survey reports display statistics and attendee responses to surveys about sessions. If a session was offered more than once during your event, session reports also show responses for each time the session was offered. If a session had multiple speakers and you included participant questions in the session survey, reports display results for each participant. (For more information on participant questions, see [Setting Up Session Surveys for Multiple Speakers](#) on page 24.)

### To view session survey reports

1. From the top menu bar, choose **Reports > Survey > View Survey List**.

The Survey Builder Home page displays.

**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey					<a href="#">Create a New Survey</a>
Name	Survey Type	Viewable by Mobile?	Action	Display Order	
✘ <a href="#">Event Survey--Gen. Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1	▼
✘ <a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2	▼
✘ <a href="#">Event Survey-- Employees</a>	Conference Survey	✓ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3	▼
✘ <a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4	▼
✘ <a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5	▼
✘ <a href="#">Panel Discussion Survey</a>	Session Type Survey	✓ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6	▼
✘ <a href="#">Event Survey--Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7	▼

[Create a New Survey](#)

### Note

You can also access the Survey Builder Home page by choosing **Surveys > List**.

2. To view reports about session surveys, click the **Session Survey Reports** link.
3. When the list of Session Survey reports displays, locate the session whose survey data you want to view.

4. Do one or more of the following:
  - To view statistics about a session that was offered only once, click the session ID.
  - To view statistics about a session that was offered at a specific time, click the session time.
  - To view combined statistics about a session that was offered multiple times, click the session ID.

**Note**

If multiple surveys were offered for the same session, the session displays multiple times. This may happen if different surveys are targeted at different audiences of the same session.

- To view statistics about a specific speaker at a session, click the speaker's name.
5. If attendees are still able to take the survey and you want to be sure to view the most current data, click **Refresh Report**.
  6. When you have finished viewing the survey statistics, click the **Close Window** link.
  7. Confirm that you want to close the window.

## View Additional Survey Details

You can view additional survey details. You can view:

- The raw data from which the survey report was developed. Raw data includes contact information for the users if the survey was not anonymous, a list of survey questions and each attendee's answers, and the date and time the survey was taken.
- If the survey was not accessed through an anonymous link, a list of the people who have taken the survey.
- For conference surveys, a summary of the report.
- For session, session profile, and session type surveys:
  - A summary of the responses for all sessions.
  - Any comments for each session.
  - If you used scale-type questions, scale scores and averages.
  - Question analyses by session. For each question with an open text response, the analysis reports the attendee ID number and the response given for that session. For questions rated on a scale, the analysis reports the total number of responses for each session and the scale values. Other question types display the total number of responses and the percentage of each answer given for that session.
  - Question analyses by day. For each question with an open text response, the analysis reports the total number of responses each day. For questions rated on a scale, the analysis reports the total number of responses each day and the scale values. Other question types display the total number of responses and the percentage of each answer given each day.

**To view additional survey details**

1. From the top menu bar, choose **Reports > Survey > View Survey List**.

The Survey Builder Home page displays.

**Survey Builder Home**

[Conference Survey Reports](#)  
[Session Survey Reports](#)

Modify a Survey [Create a New Survey](#)

Name	Survey Type	Viewable by Mobile?	Action	Display Order
✘ <a href="#">Event Survey--Gen. Attendees</a>	Conference Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	1 ▼
✘ <a href="#">Was the Q&amp;A long enough?</a>	Polling Question	No	<a href="#">Publish</a>   <a href="#">Reports</a>	2 ▼
✘ <a href="#">Event Survey--Employees</a>	Conference Survey	✔ Yes	<a href="#">Publish</a>   <a href="#">Reports</a>	3 ▼
✘ <a href="#">VIPs available for drinks?</a>	Polling Question	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	4 ▼
✘ <a href="#">Workshop Survey</a>	Session Type Survey	No	<a href="#">Unpublish</a>   <a href="#">Reports</a>	5 ▼
✘ <a href="#">Panel Discussion Survey</a>	Session Type Survey	✔ Yes	<a href="#">Unpublish</a>   <a href="#">Reports</a>	6 ▼
✘ <a href="#">Event Survey--Sponsors</a>	Conference Survey	No	<a href="#">Reports</a>	7 ▼

[Create a New Survey](#)

**Note**

You can also access the Survey Builder Home page by choosing **Surveys > List**.

2. Locate the survey whose details you want to view.
3. Click **Reports** in the Action column for the survey.  
The launch page for the survey reports displays.
4. Click the appropriate link to view the information you want.
5. If you choose to view a question analysis, a screen that includes the following fields displays:

Number of Responses:  Above ▼

Column	Value	Direction
Cut Off: <input type="text"/> ▼	<input type="text"/>	Above ▼

**Note**

If the question you are viewing had only one possible response, the Column, Value, and Direction fields do not display.

6. To view only surveys with a number of total responses above or below a number you choose, do the following:

**To specify surveys with total responses above or below a set point**

1. In the **Number of Responses** field, enter the total number of responses to use as a cutoff point.
2. From the drop-down list, choose **Above** to view the total number of responses that were chosen more times than the cutoff point or **Below** to view the total number of responses that were chosen fewer times than the cutoff point.

For example, to view which session surveys were taken more than 200 times, enter 200 in the Number of Responses field and choose Above from the drop-down list.

7. If the question had more than one possible response and you want to view data about just that response, do the following:

**To specify a single response whose data you want to view**

1. Use the **Column** drop-down list to choose the response whose information you want to view.
2. In the **Value** column, enter the response you want to use as a cutoff point.
3. In the **Direction** drop-down list, choose **Above** to view the question responses that were chosen more times than the cutoff point or **Below** to view responses that were chosen fewer times than the cutoff point.

For example, for a scale-type question with five questions, you can display all ratings below the median of three by choose the response whose ratings you want to view, entering 3 in the Value column, and choosing Below from the Direction drop-down list.

8. When you have finished choosing options, click **Refresh Report** to display the desired data.



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