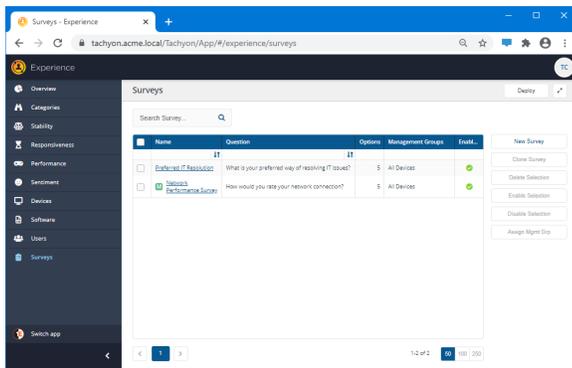# Surveys page

Summary

The **Surveys** page lets you create and manage User Sentiment and General Purpose surveys, in order to gain direct feedback on end-user experience.

There are two types of survey:

- User Sentiment surveys - these have well-defined responses that contribute to the overall Sentiment score and can be viewed by charts on the Sentiment page.
- General Purpose surveys - these can be customized to a greater extent than the User Sentiment surveys, but do not contribute to the overall Sentiment score.
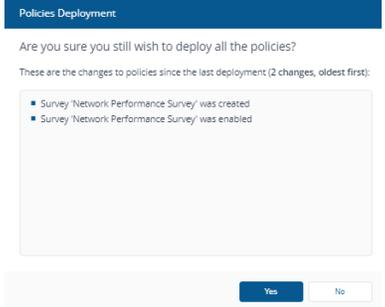
The Surveys page

At the top of the page, in the header, is a **Deploy** button. This must be used whenever you want to apply any of the changes you make to the devices targeted by the Surveys. When you click the **Deploy** button a **Policies Deployment** popup appears, as shown in the picture opposite, with a list of policy changes that have been made.

> ⚠️ You should review the changes carefully, as there may be changes as a result of other users making policy changes in 1E Experience or Guaranteed State.

The main part of the **Surveys** page is a searchable Surveys table:

Column	Description
Name	The name of the Survey. This is a link to a Survey Details page that provides all the information you need to monitor the Survey's responses. For User Sentiment Surveys the name is also a Metric that contributes towards the User Sentiment score, can be monitored via a chart on the **Sentiment** page and appears under the **Sentiment** heading of the Device Metrics - displayed when viewing device details from the Devices page. User Sentiment Surveys are marked by a Metrics icon M .
Question	Shows the question set for the Survey.
Options	The number of possible responses set for the Survey. For User Sentiment Surveys this can be 3 or 5. For General Purpose Surveys this can be any number between 2 and 10.
Management Groups	The Management Groups set for a Survey determine which devices the Survey is sent to.

Enabled	This indicates whether the Survey is enabled or not. Only enabled Surveys that are deployed become visible to end-users.

There are also a number of action buttons, which are relevant to the selections in the table.

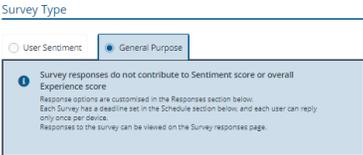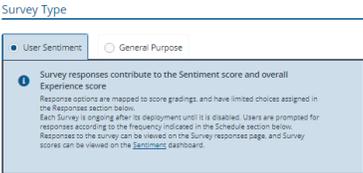| Button	Description
New Survey	Displays the **New Survey** page where you can create a new User Sentiment or General Purpose Survey. This button is only enabled if there are no selections in the Surveys table.
Clone Survey	Displays the **New Survey** page pre-filled with the details from the Survey currently selected in the Surveys table. This button is only enabled if there is a single selection in the Surveys table.
Delete Selection	Deletes the selected Survey(s) in the Surveys table. Clicking this button displays the **Survey Deletion** popup. This button is only enabled if there is one or more selections in the Surveys table.
Enable Selection	Enables all the selected Survey(s) in the Surveys table regardles of their current enabled state. Clicking this button displays the **Enable Survey** popup. This button is only enabled if there is one or more selections in the Surveys table.
Disable Selection	Disables all the selected Survey(s) in the Surveys table regardles of their current enabled state. Clicking this button displays the **Disable Survey** popup. This button is only enabled if there is one or more selections in the Surveys table.
Assign Mgmt Grp	Assigns Management Groups to the selected Survey(s) in the Surveys table. Clicking this button displays the **Assign Management Groups** popup. This button is only enabled if there is one or more selections in the Surveys table.

The New Survey page

Clicking on the **New Survey** button in the Surveys table displays the **New Survey** page, where you define all the parts to your new Survey.

Survey Type

The first choice is the **Survey Type** here you can choose between User Sentiment or General Purpose Survey types. The controls displayed for each type are slightly different.

The default **Survey Type** selected on the **New Survey** page is **User Sentiment**, as shown in the picture opposite.

If you want to define a **General Purpose** survey you must select that option under the **Survey Type** heading, as shown in the picture opposite.

Details

Here you define the **Name**, **Question**, **Description** and an optional **Link** to further information. The Details section is the same for User Sentiment and General Purpose Surveys.

Field	Description
Name	Defines how the Survey is referred to in the Experience UI. For User Sentiment Surveys the Name also defines the name of the Metric the responses will be scored on.

Questi on	Sets the question you will be asking your end-users. You should design your questions carefully, as they will be sent to end-users and you will want to maximize your responses. Some guidance and thoughts can be found on Getting feedback via User Sentiment Surveys: Names, Questions, Descriptions and Responses. The **Question** can be a maximum of **128** characters including the question mark.
Descri ption	Used to support and provide context for the **Question**, the **Description** is also displayed to end-users. The **Description** can be a maximum of **512** characters.
Link (option al)	Lets you specify the URL to any additional information you want to add to help support and provide context for the question. The text for the link is displayed to end-users as **Click here to find out more**. This field is optional.

Responses

The Responses section of a Survey differs slightly depending on whether you are creating a User Sentiment or General Purpose Survey. The main headings are the same though. The picture opposite shows the Responses section for a User Sentiment Survey.

Field	Description
Use template	Provides a template to base the responses on. For User Sentiment Responses the selected templates are fixed and cannot be edited. For General Purpose Surveys you can edit the text for the responses added by selecting a template and then add or delete more responses, up to a maximum of 10. **Template** · **Description** Visual Rating 3 — Provides 3 options: **Good**, **Average** and **Poor** with icons that help to visually describe the rating. Visual Rating 5 — Provides 5 options: **Very Good**, **Good**, **Average**, **Poor** and **Very Poor** with icons that help to visually describe the rating. Numeric Rating 3 — Provides 3 options: **Good**, **Average** and **Poor** with numbers that rank the rating. Numeric Rating 5 — Provides 5 options: **Very Good**, **Good**, **Average**, **Poor** and **Very Poor** with numbers that rank the rating. Custom — This option is only available to General Purpose Surveys and starts off with no items that are preset. When using this option you will also be prompted to add at least two options to the General Purpose Survey.
Select icon family	This heading is only displayed if you have selected either of the Visual Rating templates. It is available to both types of Survey and lets you select the family of icons that will be used to represent the visually rated options. There are four family options available: Smileys, Bars, Hourglasses and Thermometers. The icons chosen are for display purposes only and have no effect whatsoever on the responses or their score.
Respo nse options	This field shows the options that correspond to the currently selected template and icon family (if appropriate). For General Purpose Surveys the names, icons used and number of options can be edited.
Allow free text entry	This checkbox sets whether the end-user gets the option to enter free text to support or qualify their selection. When checked the end-user will see a text edit field with the label **Anyt hing more you'd like to tell us?** The free text responses can be viewed along with the response entry in the Survey Responses page.

The picture opposite shows the Responses section for General Purpose Surveys.

Here you can see that there is a delete option at the end of each response option and there is a + button for adding more options. You can add up to 10 options in total.

Clicking in the text field for an option lets you edit the text.

Clicking the colored circle for an option displays a popup where you can change the color and icon used to display the option, as shown in the picture opposite. Click **Save** when you've finished making changes.

Schedule

The **Schedule** section is different for User Sentiment and General Purpose Surveys and reflects the nature of the two types of Survey.

For User Sentiment Surveys you are trying to get information on a Metric that you want to measure progress on over time. This means that you want to prompt your end-users to respond on a regular basis. For this reason the Schedule section for User Sentiment Surveys provides an option where you can set to **Prompt question every x days**.

For General Purpose Surveys you are trying to get feedback on a particular topic on a one-off basis. Your end-users aren't likely to all respond immediately so you want to send a cut-off date that prevents the Survey from going stale but still allows your end-users to send responses when they can. For this reason the Schedule section for General Purpose Surveys provides a **Deadline** field with a date picker that lets you choose when to stop prompting users that haven't responded yet.

Survey Summary

This section provides a summary of the entries that you've made in the **New Survey** page. It also contains the **Save** and **Cancel** buttons.

There's a slight difference between the headings in the **Survey Summary** for the different types of Survey in that the User Sentiment Surveys have a heading called **Prompt** and General Purpose Surveys have a heading called **Deadline**.

The picture opposite shows the **Survey Summary** for a User Sentiment Survey.

When you've finished making changes to your Survey you click **Save** to close the **New Survey** page. At this point your new Survey will need to be enabled and deployed before it will appear to end-users. You will also check the Management Group assigned to the Survey.

Survey Summary

- **Survey Type**
  User Sentiment

- **Name**
  Network Performance Survey
- **Description**
  We've recently made some impro...
- **Question**
  How would you rate your networ...
- **Link**

- **Template**
  Visual Rating 5
- **Allow free text**
  Disabled

- **Prompt**
  every 1 days

[Save]

[Cancel]

The picture opposite shows the **Survey Summary** for a General Purpose Survey.

Survey Summary

- **Survey Type**
  General Purpose

- **Name**
  Preferred IT Resolution
- **Description**
  We're looking at how we can imp...
- **Question**
  What is your preferred way of res...
- **Link**

- **Template**
  Numeric Rating 5
- **Allow free text**
  Enabled

- **Deadline**
  28 Aug 2020 UTC

[Save]

[Cancel]

Clone Selection

There are a number of reasons why you would choose to create a copy of a Survey. You may want to create a survey with a new question and description but keep everything else the same as an existing one. Also Surveys cannot be edited, once you have created a Survey the only way to change it is to create and edit a copy. Subsequently, you would then need to disable the previous one and enable and deploy the copy.

You can copy a single existing Survey by selecting it from the Surveys table and clicking the **Clone Selection** button. This displays the **New Survey** page pre-filled with all the details from the selected Survey. When doing this you must change the name of the Survey so it doesn't clash with the previous one. You then modify the rest of the parameters as needed and click **Save** to save the copy.

Delete Selection

To delete one or more Surveys, select them from the Surveys table and click the **Delete Selection** button. A **Survey Deletion** popup will be displayed asking you to confirm the deletion. Click **Yes** to remove the Selection from Experience.

The Surveys will no longer appear in the Surveys table, however, before the deletions take effect on any previously targeted devices they must be deployed.

Enable Selection

To enable one or more Surveys, select them from the Surveys table and click the **Enable Selection** button. An **Enable Survey** popup will be displayed asking you to confirm that you want to enable the selected Surveys. Click **Yes** to enable the selected Surveys.

The selected Surveys will appear as enabled in the Surveys table, however, before the enablement changes take effect on any targeted devices they must be deployed.

Disable Survey

To disable one or more Surveys, select them from the Surveys table and click the **Disable Selection** button. A **Disable Survey** popup will be displayed asking you to confirm that you want to disable the selected Surveys. Click **Yes** to disable the selected Surveys.

The selected Surveys will appear as disabled in the Surveys table, however, before the disablement changes take effect on any targeted devices they must be deployed.

Assign Mgmt Grp

Before a General Purpose Survey can be deployed, you will need to set a Management Group to define the devices where the Survey will be sent. For User Sentiment Surveys a default **All Devices** Management Group is set when it is created.

You can set the Management Groups for one or more selected Surveys in the Surveys table by clicking the **Assign Mgmt Grp** button. Doing this displays the **Assign Management Groups** popup.

You can search for previously created Management Groups in the search field and add them to the **Assig ned Management Groups** by clicking on the list of matches.

Clicking **Save** will assign the Management Groups to all the selected Surveys.

Before changes to the Management Groups for a Survey take effect you must deploy them.