Creating an Email List Survey

OVERVIEW - OBJECTIVES

In this course we will learn how to create an email list survey using BlueQ, Creighton's online survey application. BlueQ utilizes the Vovici product, EFMCommunity.

- Verify System Requirements
- Request and Activate Account
- Log into BlueQ
- Navigate the BlueQ Interface
- Create a Survey
- Design Questions
- Edit Survey
- Test Survey
- Distribute Survey
- Analyze Responses
- Generate Reports
- Organize Surveys
- Get Help
- Exit BlueQ

NOTES:
SYSTEM REQUIREMENTS FOR APPLICATION USERS
All computers must meet the following requirements in order to design surveys in BlueQ.

- Browsers:
  - Mozilla Firefox 3.5+
  - Internet Explorer 7+
  - Safari 4+
  - Chrome 3+
- Minimum screen resolution of 1024 x 768 required for Step-By-Step Designer
- Free-Form Designer requires Internet Explorer with Active X support enabled
- Minimum screen width of 1280 is required to access all functionality

SYSTEM REQUIREMENTS FOR SURVEY RESPONDENTS
All computers must meet the following requirements in order to access surveys in BlueQ.

- Browsers:
  - Internet Explorer 6+
  - Firefox 3.5+
  - Safari 4+
  - Chrome 3+

REQUESTING ACCOUNTS
There are 225 user licenses for BlueQ. Fifty of those licenses are reserved for student accounts. Individual or group accounts can be requested. If privacy and confidentiality are a concern, you will want to request an individual account. Many departments can request group accounts to be shared amongst their employees with folders used to separate their surveys from one another.

Request Procedure
Accounts can be requested by sending an email to blueq@creighton.edu. Please include the following information:

- Individual or Shared Account
- NetID
- Division or College/School
- Department
- Shared Account Requests should also include:
  - Suggested User Name for the Group
  - Names of the other Individuals who will also use this Account

Activating Account
Upon creation, the owner of the new account will receive an email from DoNotReply@vovici.com notifying them that the account has been created and is ready for use. This email will contain the user name and a link to activate the account and set the password.

1. Click the link in the email or paste it into your browser.
2. The Password Reset screen will open.

3. In the Password and Confirm Password fields, type the new password following the requirements listed below.
   a. Must be at least 7 characters in length.
   b. Must include at least one numeric character.
   c. Cannot include the user name.

4. Click Login.

5. The Customer Login page will appear.

6. From the User Name field, type the User Name that was provided in the email.

7. From the Password field, type the Password that you just created.

8. Click Login.

LOGGING INTO BLUEQ

1. Open your web browser.

2. Type http://blueq.creighton.edu.
   -OR-
   From the Creighton Faculty/Staff home page, locate BlueSuite from the right navigation pane and then select BlueQ.

3. The login page will appear.
   NOTE: You may periodically receive Security Warning pop-ups on your screen depending on the security settings on your computer.
4. From the User Name field, type your *NetID* if you have an individual account or type your *assigned group name* if you have a shared account.

5. From the Password field, type the *password* that you set during the account activation process.

6. Click **Login**.
   - NOTE: A Welcome to Vovici 6 page may appear. If so, click **Continue on to Vovici 6**.

7. The initial Dashboard will appear.

**LAYOUT**

There are multiple tabs running across the top of the screen. A brief description of each tab is listed below.

- **Surveys** - This screen allows you to create a new survey; view, edit, distribute, and analyze surveys that have already been created; and view surveys and reports that have been shared with you.
- **Polls** - This screen allows you to collect answers to a single question quickly and easily without designing a full survey.
- **Library** - This screen allows you to create, edit, or delete standard or hierarchical questions, choice list and auto dropdown responses, survey templates, themes and report themes to be used in your surveys.
- **My Account** - This screen allows you to change your password, as well as set up your software preferences and view your account information.
CREATING A SURVEY

A survey can be created by importing from Word, using a pre-designed template from the library, or from scratch. This documentation will cover the process of designing the survey from scratch.

1. On the Surveys tab, click Design in the center of the screen.
   - OR -
   Click Design from Scratch button.

2. The Name Your Survey dialog box will appear.

3. From the Survey Name field, type the name of your survey.
4. Press <<Enter>> on the keyboard or click OK.
5. The Survey Designer screen will appear.
6. The following functionality is available within each of the sections of the screen:
   a. **Survey Designer Toolbar** – Panel used to indicate status of survey, toggle between Inline Designer and Free Form Editor modes, download a copy of your survey, preview how your survey will look, and test your survey.
   b. **Side Navigation** – Panel used to view, edit, and reorganize pages of your survey, change your survey theme, add labels, and modify various survey settings.
   c. **Survey Content Area** – Panel used to select question types and other content.

### Creating Questions and Content

1. From the Survey Content Area, click on one of the **question types** or **other content** to be added.

   **NOTE:** Hovering over a question type will display a sample of that type.

   ![Add a Question](image)

   a. **Choose One** - the most commonly used question type in which multiple responses are provided, but only one response is allowed. Requires the entry of the Question Text and Choices.

   b. **Choose Many** - allows respondents to select more than one response to a question. Requires the entry of the Question Text and Choices.

   c. **Fill in the Blank** - allows respondents to enter short responses to a question (up to 255 characters). Requires the entry of the Question Text and Topics.

     **TIP:** Typically used to gather contact and demographic type information.

   d. **Essay** - allows respondents to enter textual responses up to 1GB of text. Requires the entry of the Question Text.

   e. **Matrix** - allows respondents to enter/select from a scale regarding a category of topics. Requires the entry of the Question Text, Row Text, and Column Text. The question types that can be selected include Choose One, Choose Many, Fill in the Blank, and Essay. By default, a matrix question will have only one side. A side determines a group of responses collected per question topic. A Category can be entered if desired for side and appears as a label at the top of the matrix.

   f. **Drag and Drop Rank Order** - allows respondents to select an item on the left and drag it across the screen to rank it on the right. You can add choices with text only or text and image. This question type is only available in the Inline Designer.

   g. **Rank Order** - allows respondents to rank all, a minimum, or a subset of topics. Requires the entry of the Question Text and Topics.

   h. **Choose One with Image** - allows respondents to select one image along with the associated text. Requires the entry of the Question Text and Choice Text. An associated
image with the text can be uploaded. Maximum file size is limited to 1,024 KB and the image is automatically resized after it has been uploaded. This question type is only available in the Inline Designer.


i. **Choose Many with Image** - allows respondents to select more than one image along with the associated text to a question. Requires the entry of the Question Text and Choice Text. An associated image with the text can be uploaded. Maximum file size is limited to 1,024 KB and the image is automatically resized after it has been uploaded. This question type is only available in the Inline Designer.

j. **Scrolling Matrix** - allows respondents to select a choice per topic similar to a one-sided matrix question with the Choose One type. Topics can be added with text only or text and image. Maximum file size of images is limited to 1,024 KB and it is automatically resized after it has been uploaded. This question type is only available in the Inline Designer.

k. **Scale Slider** - allows respondents to select a response using a scale for each topic similar to a one-sided matrix question with the Choose One type. Topics can be added with text only or text and image. Maximum file size of images is limited to 1,024 KB and it is automatically resized after it has been uploaded. This question type is only available in the Inline Designer.

l. **Library Question** - allows respondents to insert a library, hierarchical, or profile question that had been created previously in the library. Library questions will require that a category be selected first. Profile questions will require that a profile be selected first.

m. **Text** - allows the survey author to communicate introductory text, instructions, or other information to the respondents.

n. **Section Heading** - allows the survey author to break up a long survey into more manageable chunks as well as group similar questions together.

   **TIP:** Sections are often used to isolate demographic information from the rest of the survey.

o. **Comments** - allows the survey author to add personal notes or ask questions of others who may be reviewing the survey; these comments are not visible to the survey respondents.

p. **Code Block** - allows the survey author to enter HTML or JavaScript code.

q. **Page Break** - inserts a page break in the survey.

2. Depending upon the question type selected, the following fields may need to be answered:
   
a. **Question Heading** - the question heading will automatically default to a number and continue sequentially. To change it to something different, click on the **number** and enter new text. By default, the heading is not displayed in the survey. It can be enabled within the Question Options section by selecting **Show Question Heading**.
b. **Question Text** – used to enter the question to be asked in the survey. Click on the text **Click to edit question text** to enter the question. A formatting toolbar will appear to format the text as desired. Additional editing options can be displayed by clicking the **Expanded Editor** icon.

c. **Question Choices** – used to enter all of the choices that the respondent can select from when answering the question text. Click on the text **Click to edit response text** to enter each choice provided. A formatting toolbar will appear to format the text as desired. A choice can be deleted by clicking the **Drop-down menu icon** and selecting **Delete**. The order of the choices can be rearranged by clicking the **Drop-down menu icon** and selecting **Move Down** or **Move Up**. Additional choices beyond the default three can be added by clicking **Add Choice** as many times as needed.

d. **Question Topics** – used for Fill in the Blank, Matrix, Rank Order, and Slider questions. Click on the text **Click to edit topic text** to enter each choice provided. A formatting toolbar will appear to format the text as desired. A choice can be deleted by clicking the **Drop-down menu icon** and selecting **Delete**. The order of the choices can be rearranged by clicking the **Drop-down menu icon** and selecting **Move Down** or **Move Up**. Additional topics beyond the default three can be added by clicking **Add Topic** as many times as needed.

3. Depending on the question type selected, various appearance options can be set in the Question Options section.
   a. **Layout** – used to select various layout options for displaying choices.
   b. **Show Question Heading** – used to show the question heading.
   c. **Randomize Choices** – used to show question choices in random order every time the survey is viewed or the page is refreshed.
   d. **Reverse Order of Choices** – used to show question choices in an opposite order every time the survey is viewed or the page is refreshed.
   e. **Answer Required** - Respondents can be required to answer a question before being allowed to continue on to the next page of the survey. This feature should be used with caution as making too many questions required can cause the respondents to become frustrated and not complete the survey. Some question types have additional options that can also be selected in conjunction with requiring an answer to be selected.

4. To add another question, click **Add** in the Survey Content area and repeat steps #1 – 3 for each question to be asked in the survey.
Editing Questions
1. Within the Survey Content Area, click on the question.
2. Make the appropriate changes to the question.
3. To delete a question, click Delete Item below the Question Options section. A confirmation message will appear. Click Delete to complete.
4. To copy a question, click Copy Item below the Question Options section. The Paste button will be enabled. Click the Paste button where you would like to insert the question.
5. To rearrange the order of the question, click Move Item Up or Move Item Down below the Question Options section.

Editing the Pages
The Pages tab within the Side Navigation panel offers the ability to add, delete, and move pages as well as customize the End Pages. Click the Pages tab to complete the following functionality.
1. To add an additional page, click Add Page.
2. To delete a page, click on the page to be deleted and click Delete Page; click Delete to confirm.
3. To rename a page, click on the page title and type in a new page name.
4. To move a page, click on the page to be moved and drag it to a new location. NOTE: Moving pages could affect survey logic such as branching.
5. A page can be viewed in either thumbnail or tree view; click the thumbnail icon to see the thumbnail view or click the tree icon to see the tree view.
6. To customize the End Page a respondent sees, click End Pages and select the appropriate end page to change.
7. To create your own End Page, click Custom End Pages and select Add a Custom Page.

Formatting Survey
There are a number of formatting options available for a survey under the Formatting tab within the Side Navigation panel. The most commonly used options are listed below. Click the Formatting tab to complete the following functionality.
- **Survey Theme** – click the Survey Theme drop down arrow to select one of the predesigned templates with color coordinated headings and text.
  NOTE: You can create your own survey theme within the Library by clicking on Themes.
- **Survey Title** – click the Show checkbox to display the Survey Title. You can change the title that appears to something else.
- **Buttons** – click the button that you want to appear in the survey. Options include Reset, Back, Save, and Jump. The Next and Submit buttons automatically appear. Click Edit Button Labels to change the text of any button.
• **Survey Tag Line** - can be left at the default option which links to the Vovici web site or customized to enter your own link. The survey tag line appears at the bottom of each page of the survey. Click **General** and **Custom Link**.

• **Progress Bar** - you can select how to have the progress bar display in the survey. Click **Progress Bar** and select **Show Progress Indicator**, **Show Progress Percent**, or **Show Page Number**. Depending upon the option selected, additional appearance and formatting selections can be made.

**Labels**

Several options are available under the Labels tab within the Side Navigation panel. Click the **Labels** tab to adjust the labels and validation messages for buttons, questions, and survey results’ labels.

**Translation**

Additional languages can be added for survey translation. Click the **Translation** tab.

**Branching**

The Branching Designer allows the ability to set criteria, edit, and visualize the flow. Click the **Branching** tab.

**Advanced**

Several advanced options are available under the Advanced tab within the Side Navigation panel. Click the **Advanced** tab to complete the following functionality.

Options include:

• **Survey Glossary** - define key words within the survey that you want to explain.
• **Email Triggers** - set email triggers and alerts based on specific survey responses.
• **Quotas** - set quotas to limit the number of participants who can respond to the survey.
• **Scoring** - allows the ability to assign scores and indicate whether a participant has passed or failed.
• **Version History** - allows you to view and restore previous versions of the survey.
• **Edit HTML** - allows you to customize the base HTML of your survey; this option is only available once the survey has been published.
• **All Survey Spell Check** - runs spell check for the entire survey.

**Properties**

Various general property options are available under the Properties tab within the Side Navigation panel. Click the **Properties** tab to complete the following functionality.

Options include:

• **General** - allows you to set options to not allow a respondent to update a survey that they already completed, to resume the survey from the last page of the survey that they completed, to track the respondent’s IP address, or generate Mobile HTML.
• **Description** - allows you to enter a description about the survey.
• **Survey Owner** - allows you to change the owner of the survey to another BlueQ user.
• **Statistics** - allows you to view general data associated with your survey such as number of questions, pages, etc.
• **Custom Properties** - allows you to store and access metadata related to your survey.
Comments
The Comments tab within the Side Navigation panel allows the survey author to add personal notes related to the survey. These comments are not visible to the survey respondents. Click the Comments tab to enter a comment.

Preview Survey
To preview the survey at any time, click Preview in the Survey Designer Toolbar. Click Edit to return to edit mode.

Visualizing and Testing Survey Logic
To view and test any logic in a survey, click Outline and Flow in the Survey Designer Toolbar. Different view buttons can be selected to see different information. Click Expand All to see the question choices which allows you to test the various scenarios within the survey.

Testing Survey
After all questions have been created, it is time to test the survey. It is extremely important that you test the survey extensively in order to ensure that it works the way you want it to. After testing it may be necessary to make changes to the survey and then retest again. All features of the survey should be tested before the survey is opened and made live.

1. Click Test on the right side of the Survey Designer toolbar.
2. A confirmation message will appear stating that all current test data will be removed; click OK.
3. The testing screen will appear.
4. The testing url that appears in the black bar at the top of the screen can be copied and pasted into a web browser to test as much as you like or shared with others to assist you in testing.

5. Make changes to the survey as needed depending on the results of testing.

**Copying a Survey**

Once a survey has been created, you have the ability to copy it when creating a new survey. You can then change the new survey as needed.

1. From the My Surveys landing page, click the **checkbox** for the survey you desire to copy.

2. Click the **Copy** button.

3. The Copy a Survey window will appear.

4. From the Survey Name field, type a **new name** for the copied survey.

5. Click **OK**.

**NOTES:**
6. The copied survey will appear and you can edit as needed.

**Deleting a Survey**
1. From the My Surveys landing page, click the checkbox for the survey you desire to delete.
2. Click the **Delete** button.
3. A confirmation message will appear. To delete, click **Delete**.

**Previewing a Survey**
1. From the My Surveys landing page, click the checkbox for the survey you desire to review.
2. Click the **Actions** button and select **Preview**.
3. The survey will appear in a separate window as one page allowing you to print or save it as needed. All questions are displayed except for hidden questions. The Preview option is available for all surveys in Design, Open, and Closed statuses.

**Distributing a Survey**
Following the creation and testing of a survey, you are ready to distribute the survey to the participants.

1. Click the **Distribute** tab at the top of the screen.

2. Initially since you have not selected a distribution method, you will be directed to the Distribution Landing Page.

3. There are four distribution options available:
   
   **NOTE:** This documentation will focus on the Send to an Email List method of distribution.
   
   a. **Open Participation** – anyone who clicks on the survey URL can complete the survey.
   b. **Send to an Email List** – participation is limited to an uploaded list of names and email addresses.
   c. **Require a Passcode** – participants are required to enter passcodes before starting the survey.
   d. **Send to Panelists** – participation is restricted to only invited panelists from within a workgroup.

4. Click **Send to an Email List**.
5. The Initial Invitation screen will appear.
6. Participants can be added in one of two methods:
   a. Type the email addresses into the To field.
   - OR-
   b. Add participants using the Manage Participants window.

7. To add participants manually, type the email addresses into the To field. Skip to step 10 to continue.
   **NOTE:** Each email address must be separated by a comma or semicolon.

8. To add participants using the Manage Participants window, complete the steps listed below:
   a. Click the **Add Participants via Manage Participants** link.
   b. The Manage Participants screen will appear.
   
   c. Click the **Add** drop down arrow and select **Import Participants**.
   **NOTE:** Two other options are available from the Add drop down arrow. Email Addresses Only allows the entry of the participants’ email addresses and Add Individual Participant allows the entry of email address, culture, and keys (1 – 3).
   
   d. The Import Participants screen opens.
   e. Click **Browse** to select a file to upload.
   **NOTE:** Files imported must be saved as .csv, .tsv, or .txt types. The first line of the file should contain the identifying headers which tell BlueQ which values to write to which columns in the database. The email address is a required field. Each participant should be on a separate line.
   
   f. Navigate to where the file is saved and select the **file**.
   g. Click **Next**.
   
   h. A wizard may appear if there are fields that need to be matched.
i. Click on the **Respondent Fields** drop down arrow and select the **matching data**.
   Repeat this step for as many fields that need to be matched.

j. Click **Next**.

k. Click **Import** to begin importing the data.

l. Click **Close** when the task has been completed.

m. All participants added via the file will appear in the table.

9. Click **Return to Invitation Designer**.

10. The email addresses of those added will now appear in the To field.

11. Click the **From** drop down arrow and select the **email address** that the invitation should be sent from.

   **NOTE:** All email addresses will not automatically appear in the From field but must be requested.
   To place a request, email blueq@creighton.edu and provide the email address that should be listed along with the label (name or department to appear).

12. In the Subject line, type the **subject** of the message.

13. In the message text area, type the **body** of the message.

14. To insert fields of information that were imported, click **Insert Field** and double click on the **desired fields**.

15. To insert the survey URL, click **Insert Survey Link**.
   a. A window will appear allowing you to type the text to appear for the link.
   b. In the Link Text field, type the **survey URL text**.
   c. Click **OK**.

16. Click **Preview** to view the invitation.
   a. Click **Close** to close the preview window.

17. If you would like to test the invitation prior to sending it out, click **Test Invitation**.
   a. In the window that appears, type the **email address** to send the invitation.
   b. Click **Send**.
   c. A confirmation message will appear stating that the test message has been sent.
   d. Click **Close**.

18. From the Delivery Schedule section, select the desired **delivery option**. Selections include:
   a. **Send Later** – allows the selection to be selected at a later time.
   b. **Send Now** – sends the invitation immediately.
   c. **Send at a specific date and time** – allows you to select the date and time as well as a recurrence if desired.

19. Depending upon the delivery option selected, click the appropriate **save** or **send** option.

   **NOTE:** If Send Later was selected, click **Save Invitation**. If Send Now was selected, click **Send Invitation Now**. If Send at a specific date and time was selected, click **Save Schedule**.

20. When selecting to Send Now, a confirmation message will appear asking to open your survey now and send the invitations. Click **Open Survey and Send Invites**.
21. The Distribution Dashboard will now appear.

22. The following information is available on this dashboard:
   a. **Mode Panel** - indicates the distribution method selected.
   b. **Status Panel** - displays whether the survey is open or closed and provides the ability to update changes to the survey as well as open or close the survey depending on the current status.
      NOTE: If the status is already set to open, the Close Survey Now button is displayed allowing you to close the survey.
   c. **Participants Panel** - provides an overview of participant's activity indicating the number of participants who have started and completed the survey. Hyperlinks are available to click on for further details.
   d. **Schedule Panel** - provides an overview of all survey events. Events can be edited, sent, republished, or closed depending on the status of survey events.

23. To schedule a reminder, click **Add a Reminder** in the Schedule Panel.
   a. Initially the First Reminder Invitation screen will appear.
   b. Repeat steps #12 – 19 as listed above.
   c. Complete this step to add additional reminders or a thank you message.

24. To apply changes made to the survey after going live, click **Apply Changes to Survey**.

25. A confirmation message will appear. Click **Apply Changes**.
   NOTE: Once a survey is live, only certain changes can be made to a survey. New questions can be added; however, participants who have already submitted the survey will have null responses for the new content.
ANALYZING RESPONSES

Once participants begin to take the survey, you have multiple methods of analyzing the data available to you.

1. Click the **Analyze** tab at the top of the screen.

![Analyze tab](image)

2. You will be directed to the Analyze Landing Page.

3. There are three analysis options available:
   a. **View Standard Report** – displays a combination of charts and tables for each question in your survey.
   b. **Design from Scratch** – provides you with the ability to create your own report.
   c. **View Responses** – displays the raw data from your survey and gives you the opportunity to filter it as well as download it into another format.

VIEWING RESPONSES

1. Click **View Responses** from the Analyze Landing Page.

2. The Response Manager screen will appear.

![Response Manager](image)

3. The column headers correspond to each question asked in the survey. When resting your mouse over a column header, the question and choices will be displayed.

4. By clicking the **Frequency Chart** for an individual column, a Frequency Report appears for the selected question topic. Click **Close** to close the window.
5. Each row displays one respondent’s responses to the survey questions.

6. By clicking the Record ID for an individual row, a Respondent Profile Report appears. Click Close to close the window.

7. The same data is visible in both the Respondent Profile Report and in the raw data table. The difference between the two views is that the responses in the Respondent Profile Report are listed vertically rather than horizontally and the questions are provided next to the responses.

8. By default, ten records at a time are displayed. To view additional records, click a different view from the View per Page section at the bottom of the Response Manager screen.

9. To navigate through multiple pages of responses, use the page buttons at the bottom right of the Response Manager screen.

**Hiding Columns**

You have the capability to hide any column in the Response Manager screen. By hiding columns, it may be easier to view key information. By default, all columns are displayed.

1. From the Actions bar at the top of the screen, click Columns.
   -OR-
   Click the Actions drop down arrow and select Columns.

2. The Columns tab of the Display Options window will appear.

3. Click the checkbox of the question and/or respondent fields to be hidden so that the checkbox is empty.

   **TIP:** You can use a multi-select option to select multiple questions at one time by holding down the Ctrl button for non-consecutive selections or the Shift button for consecutive selections.
4. Click **Apply** to save the changes.

**Filtering Data**

Responses to the survey can be filtered based on a criterion that is set. There is also a date filter option that will be discussed later.

1. From the Actions Bar at the top of the screen, click **Filter**.  
   **-OR-**
   Click the **Actions** drop down arrow and select **Filter**.
2. The Filter window will appear.
3. Click the **Add** button.
4. The Add Filter Criteria window will appear.
5. The Source drop down arrow will default to the current survey; however, you can click the drop down arrow to select **Participant Information** allowing you to filter on that data.
6. From the Field drop down arrow, select the **question** that the filter will be applied to.
7. From the Expression drop down arrow, select the **comparison** to make between the question and the choice; options include:
   a. **= Equals**
   b. **≠ Not Equals**
   c. **< Less Than**
   d. **> Greater Than**
   e. **≤ Less Than or Equal To**
   f. **≥ Greater Than or Equal To**
8. From the Value drop down arrow, select the **choice** the question is being compared to or for Fill in the Blank questions, enter the **value**.
9. Click **Add**.
10. The filter added will now appear.

11. To add additional filters, repeat steps #3 – 10.
12. If multiple criteria have been applied to the filter, an And/Or option appears at the end of the first criteria; change if needed.
   a. **And** indicates that two or more filters must be true in order for the response to be displayed.
   b. **Or** indicates that only one of the filters must be true in order for the response to be displayed.
13. To change the filter, click on the **filter link**; make the appropriate changes.
14. To remove a filter, click the **appropriate filter checkbox** and then select **Delete**.
15. To move the criteria up or down in the list, click the **appropriate filter checkbox** and then click **Move Up** or **Move Down**.

**NOTE:** The order of the filters is important as the filters are executed in a sequential manner.
16. To apply the filter(s), click the **checkbox(s)** in front of the filter.
17. Click **Apply Filter**.
18. Responses that match the specified criteria will now appear in the table.

**NOTE:** An indicator appears above the table to state that a filter has been applied and gives you the ability to edit or clear the filters.

### Editing Filters
At any time if you wish to edit any filters that have been applied, take the following steps:
1. Click **edit** in the Current Filter window that appears at the top of the screen.
2. Make the appropriate changes to the filter.

### Removing Filters
At any time if you wish to remove any filters that have been applied, take the following steps:
1. Click **clear** in the Current Filter window that appears at the top of the screen.

### Date Filters
The other filter option that is available is the Date Filter. This option includes predefined dates that can be applied to filter your responses. When selecting a filter, you will need to specify if the date is to be based on the Start, Modify, or Complete date. Options available to filter on include:

- **Clear All Date Filters** - removes any filters that had been previously applied.
- **Today** – displays only responses submitted today.
- **Current Month** – displays responses for the current calendar month.
  - **EX:** If today is December 15, 2008, all responses within the month of December 2008 will be displayed
- **Current Quarter** - displays responses for the current quarter; quarters run from Jan – Mar, Apr – Jun, Jul – Sep, and Oct – Dec.
- **Current Year** – displays responses for the current calendar year.
- **Year to Date** – displays responses for the current year thus far.
- **Last Month** – displays responses from the previous month.
  - **EX:** If today is December 15, 2008, responses from November 2008 will be displayed
- **Last Quarter** – displays responses from the previous quarter.
  - **EX:** If today is December 15, 2008, responses from July 2008 through September 2008 will be displayed
- **Last Year** – displays responses from the previous calendar year. **EX:** 2007

To apply a date filter, complete the steps listed below:
1. From the Action Bar at the top of the screen, click **Date Filter**.
2. Select the **desired Date Filter** option.
3. From the Select Date Field window that appears, select the **date** to be used as the base; options include:
   a. Started Date
   b. Modified Date
   c. Completed Date
4. Click **OK**.
Export Options
You have the ability to export the responses into another format. The options available include:

NOTE: A quick download option is available from the Analyze Landing Page without even going into the Response Manager screen.

- **CSV (Comma Delimited)** - downloads a comma separated value file where all the values in the file are separated by a comma.
- **TSV (Tab Delimited)** - downloads a tab separated value file where all the values in the file are separated by a tab.
- **Microsoft Excel** - downloads an Excel format file.
- **SPSS** - downloads a .SAV file which is the default file format for SPSS, a statistical analysis software.

To export your results, complete the steps listed below:

1. From the Action Bar at the top of the screen, click **Export**.
2. Select the **desired export option**.
3. The Export Responses window will appear.
4. From the Columns section, select **Displayed Data** to export just the columns that are displayed or **All Response Data from the Current Survey** for all columns.
5. From the Filter section, select **No Filter** or **Current Filter** to export the data with no filter applied or with the existing filter applied.
6. From the Content section, select **Raw Data** or **Formatted Data** with additional choice options of report values, export values, or choice labels.
   
   NOTE: If Formatted Data is selected here, the file cannot be imported back into BlueQ.
7. From the Column Headers section, select **Question Text** or **Question Heading** as the header row of the exported data.
   
   NOTE: If Question Text is selected here, the file cannot be imported back into BlueQ.
8. Click **Next**.
9. The data will be exported and a link will appear on the screen that allows you to save or open it.
10. Click the **download link** on the screen.
11. Select **Open** or **Save**.
12. After reviewing the data, click **Close** on the Export Responses screen.
**Import Files**
There are two import options where you can bring responses into BlueQ that may have been collected in methods other than electronic. The first method, which will be detailed here, is the importing of files. The other method, which will be detailed later, is the importing of responses from other surveys.

1. From the Action Bar at the top of the screen, click the **Actions** drop down arrow and select **Import, From File**.
2. From the Import Responses screen, click **Browse** and navigate to where the file is saved.  
   **NOTE:** The file must be a .csv, .tsv, .txt, or .zip type file.
3. Double-click the **desired file**.
4. Click the **Next** button.
5. If all the question fields map successfully, a confirmation message will appear; otherwise a wizard may be needed to map the fields. 
   a. If the wizard appears, select the field from the **Response Fields** drop down arrow that corresponds to the appropriate Imported File Column.
   b. Repeat as needed until all fields have been mapped.
6. Click **Next**.
7. Click **Import** to begin the import process.
8. Click **Close** when the import process has completed.

**Import Other Survey Data**
You also have the ability to import responses from other surveys.

1. From the Action Bar at the top of the screen, click **Actions**.
2. Select **Import, From Other Survey**.
3. From the Import From Survey screen, select the **other survey** to be imported.
4. Click **Next**.
5. If all the question fields map successfully, a confirmation message will appear; otherwise a wizard may be needed to map the fields. 
   a. If the wizard appears, select the field from the **Import Field** drop down arrow that corresponds to the appropriate Response Field.
   b. Repeat as needed until all fields have been mapped.
6. Click **Next**.
7. Click **Import** to begin the import process.
8. Click **Close** when the import process has completed.

**Managing Reports**
1. Click **View Standard Report** from the Analyze Landing Page.
2. From the Name Your Report screen that appears, type the **name of the new report**; click **OK**.
3. The Report Designer appears.
4. The following information is available on this screen:
   a. **Report Designer Toolbar** - allows you to edit the report title, filter the data, download the report, and view it.
   b. **Side Navigation** - allows the content and pages to be customized as well as changing report themes.
   c. **Edit Content Panel** - displays the customization options. You must click *Edit* for Report View on the toolbar before this panel appears.
   d. **Report Content Area** - includes the reporting elements that have been added to the report.

**Editing Report Elements**

There are various editing options that are available within a report. The available selections in the Edit Content Panel will vary depending on the type of report element selected. In general you have the ability to change features of the Report Element, Appearance, Data, and Displayed Values.

Element Hover Controls will also appear when resting your cursor over a report element in the Report Content Area. The following functionality is available:

- **Filter** - allows you to filter the data that is displayed.
- **Copy** - allows you to copy the report element.
- **Delete** - allows you to delete the report element.
- **Move Down** - allows you to move the report element down.
- **Move Up** - allows you to move the report element up.

**Editing Pages**

The Pages tab within the Side Navigation panel offers the ability to add, delete, and move pages within the report.

1. To add an additional page, click **Add Page**.
2. To delete a page, click on the **page** to be deleted and click **Delete Page**; click **Delete** to confirm.
3. To rename a page, click on the **page title** and type in a **new page name**.
4. To move a page, click on the **page** to be moved and drag it to a new location.
Formatting Pages
There are limited formatting options available for the report under the Properties tab within the Side Navigation panel.

1. Click Formatting from the Side Navigation panel.
2. Click the Report Theme drop down arrow and select the desired theme.

Filtering Reports
As with managing responses, you can also filter on reports to select or exclude data based on the filter criteria that you have set.

1. From the Report Designer Toolbar, click Filter Report Data.

2. Both the Data and Date Filter options appear on the screen.
3. To apply a data filter, complete the steps listed below in the Data Filter section:
   a. Click Add Another Criteria
   b. From the Question drop down arrow, select the question the filter will be applied to.
   c. From the Expression drop down arrow, select the comparison to make between the question and the choice.
   d. From the Value drop down arrow, select the choice the question is being compared to or for Fill in the Blank questions, enter the value.
   e. Click Save.
   f. If the filter needs to be changed, click the filter and make the appropriate changes.
   g. To remove the filter, click the Remove button.
   h. To add additional filters, click Add Another Criteria.
   i. Repeat steps 3a – 3e.
   j. To move the criteria up or down in the list, click the Move Up or Move Down arrow for the appropriate filter.
      NOTE: The order of the filters is important as the filters are executed in a sequential manner.
   k. Click OK to save the filter.
4. To apply a date filter, complete the steps listed below in the Date Filter section:
   a. Click the Select Date Field drop down arrow and select the desired criteria.
   b. Click the Time Period drop down arrow and select the desired period.
   c. Click OK.
Downloading Reports
Reports can be exported into other formats. Options available include PDF, Microsoft Word, Microsoft PowerPoint, and Cluster Report.

1. From the Report Designer Toolbar, click Download Report.
2. Select the desired format.
3. Make the appropriate selections from the screen that appears.
4. Click Export.
5. When the report is ready, click on the hyperlink that appears on the screen to open or save the file.
6. Click Close to close the download window.

Viewing Reports
To view the report, click Preview from Report View in the Report Designer Toolbar.

Adding Additional Report Elements
Additional report elements can be added to a report in addition to what appears with the standard report.

2. From the Report Content Area, click any Add button that appears. 
   NOTE: Typically an Add button will appear above and below the existing report element.
3. Report elements that can be added will appear in the Edit Content Panel.
4. Select the report element that you want to add. Options include:
   - Frequency Table
   - Frequency Chart
   - Trend Table
   - Trend Chart
   - Summary Table
   - Summary of Means
   - Cross-tab
   - Question

5. Select the data for the report element from the screen that appears; click Select.
   NOTE: Depending on the report element selected, there may be multiple selections to make.

Creating Additional Reports
In addition to the Standard Report, various other types of reports can be created. These reports include:

- **Comprehensive** – displays charts, summary statistics, and frequency distribution by selected question.
- **Executive Summary** – displays overall summary information for each question.
- **Frequency** – displays frequency distributions with counts and percentages by question.
- **Statistics** – displays summary statistics including means, median, and standard deviations by question.
- **Verbatim** – displays listing of all replies to open-ended (text response) questions.
- **Single-Question Banner** – displays a cross-tabulated report in a banner-and-stub format with the results of each question summarized by the selected question.

NOTES:
Summary of Means – displays a cross-tabulated report of means for each question with options for additional summary statistics.

Trend – displays an analysis of the results of each question by a selected time interval.

Cross-tab Analysis – displays a cross-tabulation of multiple variables at the same time.

If you are currently viewing a report and would like to create another type of report, you will need to go to the My Reports Landing page.

NOTE: If you are on the initial Dashboard screen, click the Analyze button for the report you wish to create a report for.

1. Click My Reports from the top left corner of the screen.
2. The My Reports landing page will appear.
3. To create a new report, click the report type from the Other Reports section.
4. From the Name Your Report screen that appears, type the name of the new report; click OK.
5. The Report Designer appears and you can customize the report as needed.

Copying Reports
To allow for greater consistency with colors, themes, and formatting, reports can be copied.

1. From the My Reports landing page, click the checkbox for the report you desire to copy.
2. Click the Copy button.
3. The Copy a Report window will appear.
4. From the Report Name field, type a new name for the copied report.
5. Click OK.
6. The copied report will appear and you can edit as needed.

Designing Reports from Scratch

1. Click Design from Scratch from the Analyze Landing Page.
   -OR-
   From the My Reports landing page, click Design from Scratch.
2. From the Name Your Report screen that appears, type the name of the new report; click OK.
3. Complete the instructions from the Managing Reports section above on adding report elements, navigating, and other reporting functions.

NOTES:
ORGANIZING SURVEYS

Within the My Surveys folder on the My Surveys landing page, you have the ability to create additional folders to help you organize your surveys. If you have a shared account, folders could be created for each individual so there is not a lengthy list of surveys to search through. You can create as many folders and subfolders as you like. All folders will be listed in alphabetical order.

Creating Folders

1. Select the root folder that will be the parent folder for the new folder.
2. Click the Add button.
3. From the Enter a Name for the Folder window, type the new folder name; click OK.

Renaming Folders

1. Click on the checkbox in front of the folder to be renamed.
2. Click the Rename button.
3. The folder name is now editable; type the new name of the folder; press OK to save.

Deleting Folders

1. Click on the checkbox in front of the folder to be deleted.
2. Click the Delete button.
3. A confirmation message will appear; click Delete.

Moving Surveys

If you have surveys that are not in the desired folder, they can be moved.

1. Click on the checkbox in front of the survey you desire to move.
2. Click Actions and select Move. Select the folder to move the survey to.

Printing Surveys

1. Click on the checkbox for the survey you desire to print.
2. Click Actions and select Preview.
3. Click File, Print from the browser window.
4. Make the necessary printer selections and print the survey.

GETTING HELP

At any time you can get help using BlueQ by referring to the Vovici online documentation. Please keep in mind that some features that may be described may not be relevant to Creighton due to the version of the software. If you ever have questions on what features are or are not present at Creighton, please send an email to blueq@creighton.edu.

To get assistance using the online documentation, click Help located in the upper right corner of the window. Creighton specific tutorials on how to use various functions in BlueQ can also be found in BlueTrain at http://bluetrain.creighton.edu.

Other BlueQ users can collaborate through a BlueQ Users list serv. If you would like to share information and/or ask for assistance with something you are working on, sign up by going to http://lists.creighton.edu/mailman/listinfo/blueq_users. Every semester a BlueQ Users group also meets. Speakers present on various topics and attendees also have the opportunity to ask questions.

EXITING BLUEQ

When you are finished using BlueQ, be sure to click the Log Out button located in the upper right hand corner of the screen.