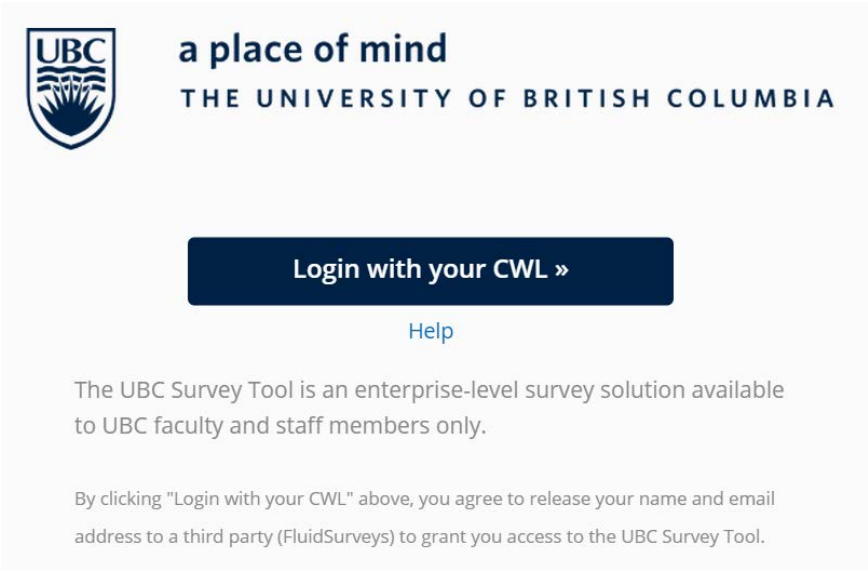
Contents

Accounts

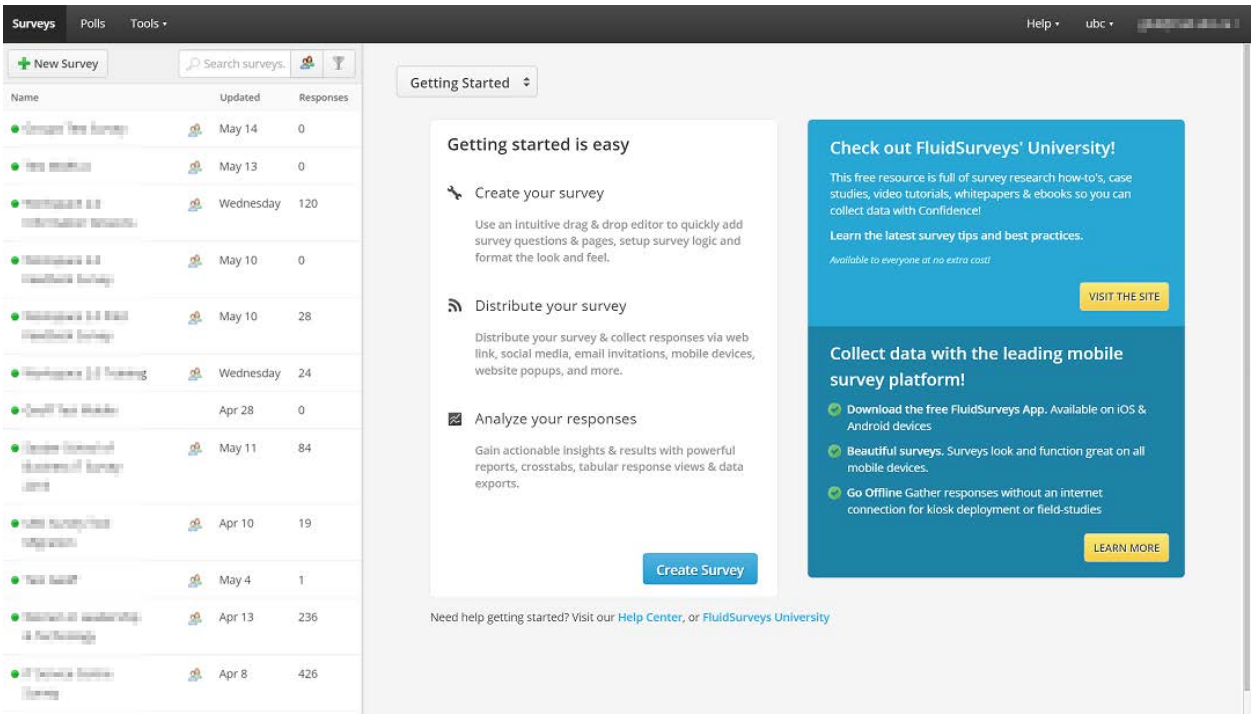
Logging In

To log into the Survey Tool,

1. Go to https://survey.ubc.ca, and click on the **Login with your CWL >>** button



2. Login with your CWL user credentials
3. You should be greeted with the Dashboard and any surveys you have access to



Note about CWL user accounts

Only “active” CWL users are eligible for a Survey Tool account. This means that any active student or teaching faculty with an employee or student number associated with their CWL account can immediately use the Survey Tool.

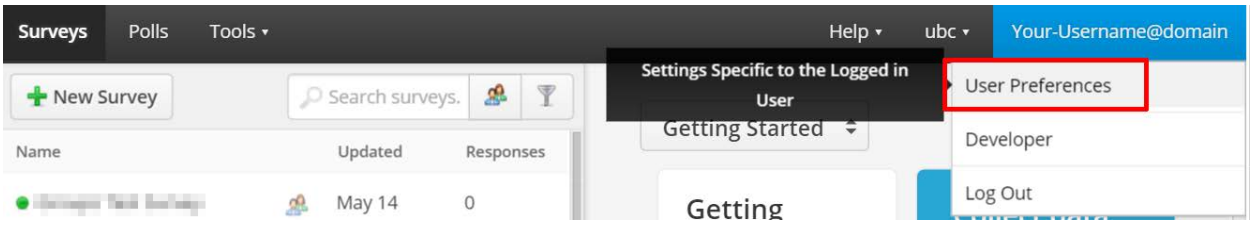
There may be some edge cases where non-UBC users may be eligible for a Survey Tool account due to their affiliation with the university, but do not have active CWL accounts (maybe just Basic CWL accounts). Please contact the Communications team to escalate these unique cases.

Any individuals who have CWL accounts, but are no longer active, include alumni, retired staff, and emeriti. These users are not eligible for an account.

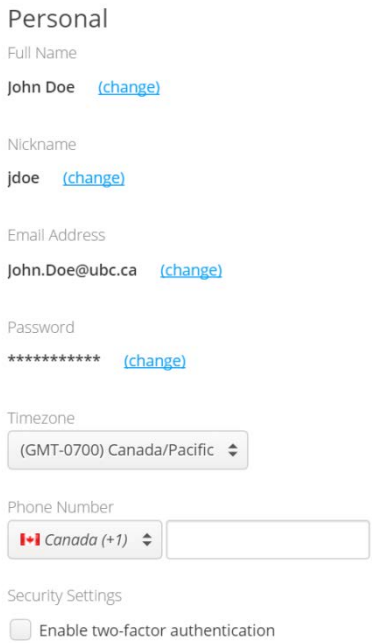
Updating Your Account Details

The user may have a need to change their name or nickname in the system, or email address. To do so,

1. Log into the Survey Tool
2. From the menu bar at the top, click on your current “username” in the top right corner, and select **User Preferences**



3. On the **Personal** page, click on the **change** link beside any field which you want to change



4. To commit all changes, click on the **Save Changes** button

Adding/Inviting Users

Due to the account provisioning system being tied directly into Shibboleth, there is no need to “invite” or “add” users. Upon logging in with a valid CWL account for the very first time, FluidSurveys receives information from Shibboleth and auto-provisions accounts on the fly.

To “invite” a user, simply have them log into the survey tool with their CWL account. Their account will be immediately created for them.

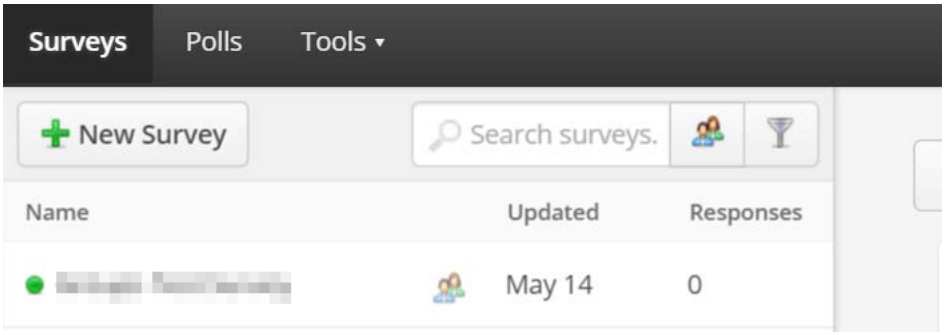
Surveys

Creating a Survey from a Template

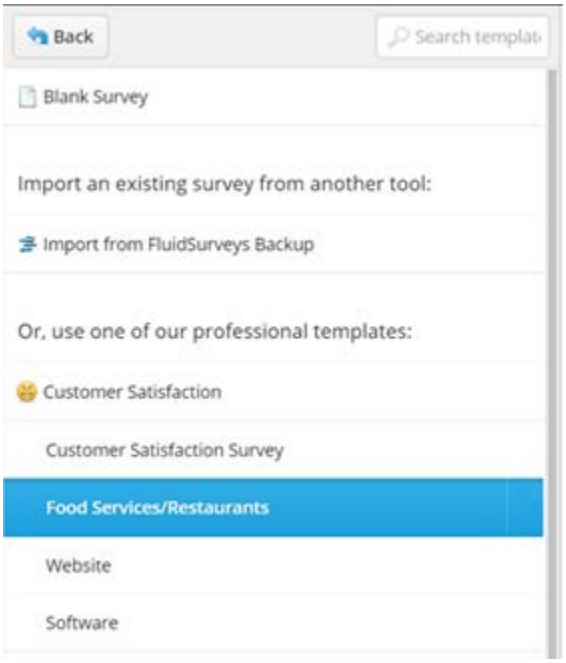
FluidSurveys includes many canned survey templates from which you can select. This greatly cuts down on the time spent on creating a survey for common use cases. In cases where you may be creating several surveys of similar nature, you may also create a custom template and save it into FluidSurveys so you may use it again in the future.

To create a survey from a pre-defined template,

1. Log into the survey tool
2. Click on the **+ New Survey** button

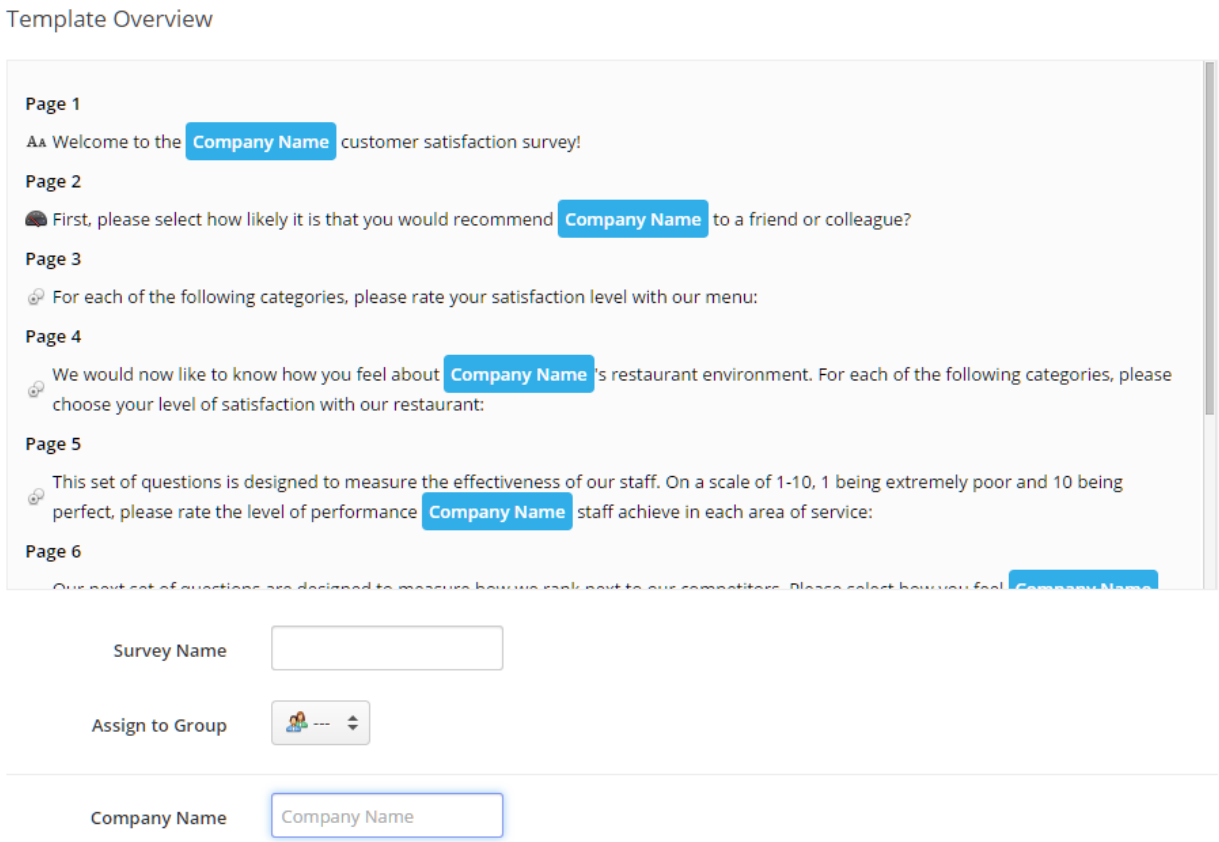


3. From the list of templates in the left pane, select the **Template** category, and then select the specific survey template to be applied



4. In the right pane, enter the necessary information for this survey. Survey question types are previewed here, and are edited in the next pages.
    a. **Survey Name**: The name of the survey as displayed in all lists and preview panes
    b. **Assign to Group:** If you wish to share this survey with other users in any Groups you belong to, you may set the preliminary Group here.
    c. **Custom Variables**: Depending on the template you have selected, there will be a list of custom variables. These variables are used to pre-fill contents that appear in the survey Template. For example, if there is any preamble text or wrap up message, these custom variables will automatically fill in necessary info with content you enter. Selecting any

custom variable highlights the variable in the template body:



5. When you have entered all necessary information, click on **Create Survey >>** to move on to creating survey questions

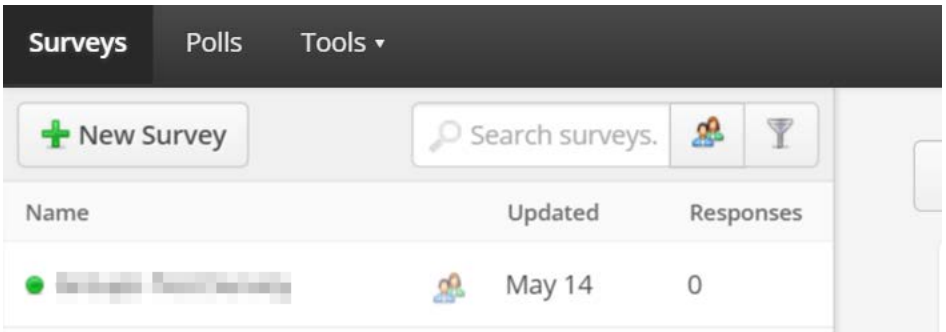
Creating a Survey from Scratch

If you need to create a survey with custom questions and messaging, you can create one completely from scratch without a Template.

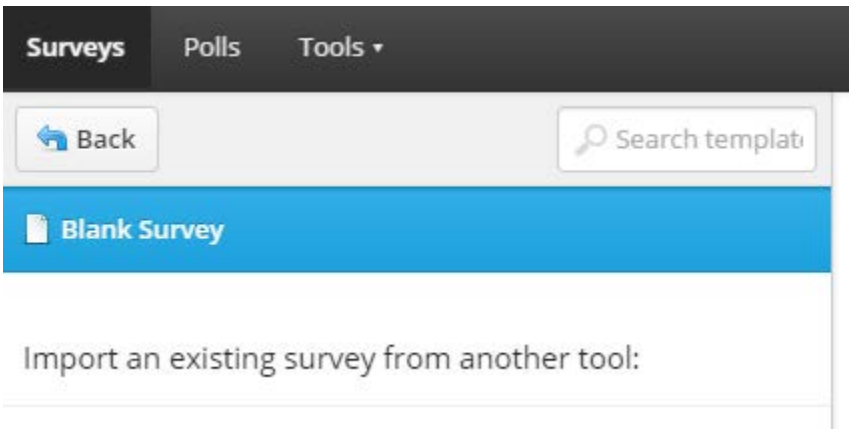
To create a survey from scratch:

1. Log into the survey tool

2. Click on the **+ New Survey** button



3. Select **Blank Survey** from the list of Survey Templates



4. In the right pane, enter the necessary information for this survey. Survey question types are previewed here, and are edited in the next pages.
    a. **Survey Name**: The name of the survey as displayed in all lists and preview panes
    b. **Default Language**: If you are creating a multilingual survey, or simply a survey with a primary language other than English, select the Language here. **Note:** This will only translate text on elements such as buttons or multi-scale labels. This will not translate any text that you enter as questions or pre-amble.
    c. **Assign to Group**: If you wish to share this survey with other users in any Groups you belong to, you may set the preliminary Group here.
5. When you have entered all necessary information, click on **Create Survey >>** to move on to creating survey questions

Setting Survey Questions

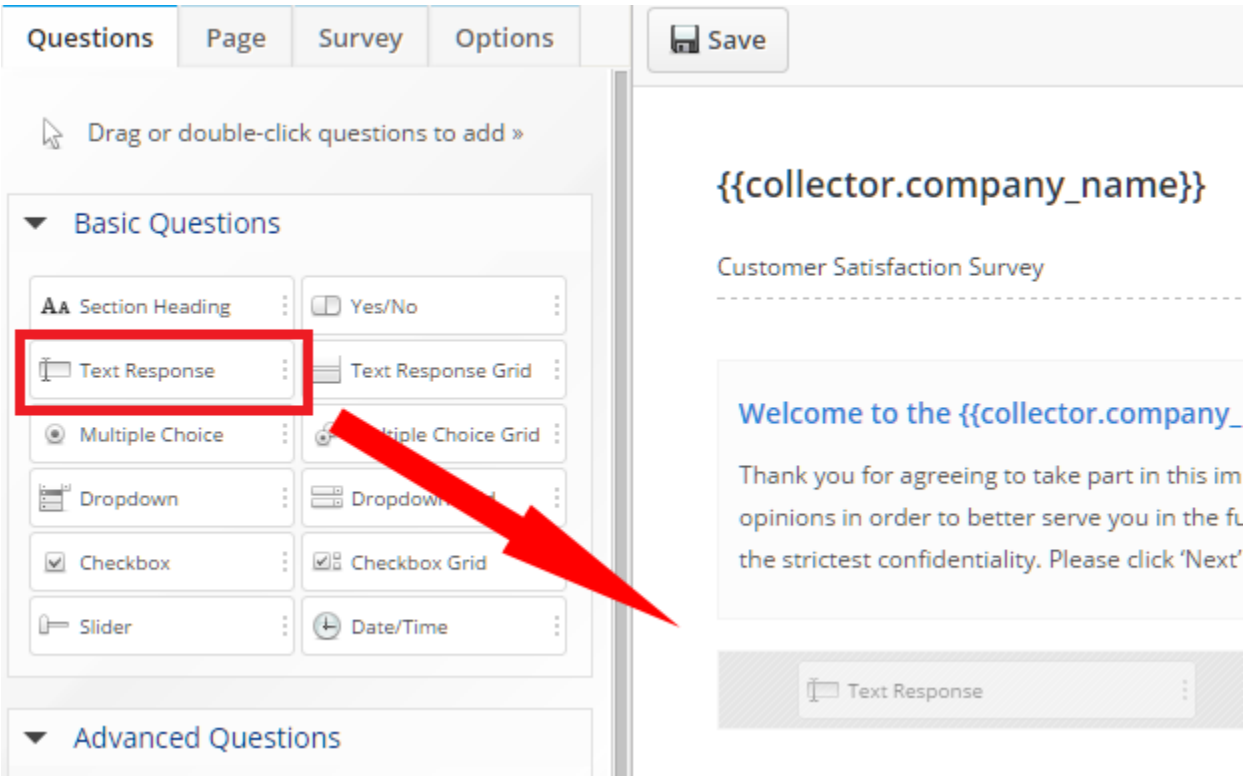
The Survey Questions interface is entirely drag and drop, allowing you to create new questions or re-arrange existing questions easily.

To change a question's text or options, you must click to select that question, then select what property you want to change.

Create a Question

To create a question,

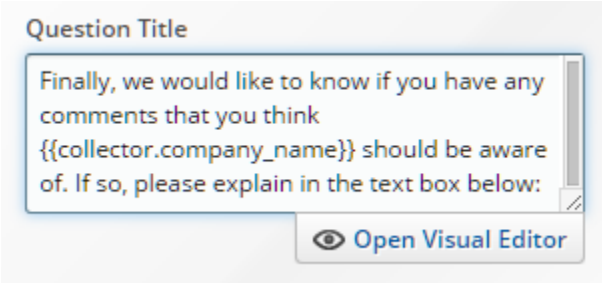
1. Click and drag the question from the list of **Basic Questions** or **Advanced Questions**



   a. If you have previously saved a custom question, you may select it from the **Question Bank**. **Note:** These questions must be created and saved from an earlier time before you can use it. These are not pre-defined question types that come with the system.

2. Once you have dragged the question to the Survey Page, you should see the **Options** tab open with the applicable question fields available to you. Common fields include:
   a. **Question Title**: What the question text should read
   b. **Extra Description**: If you need to include any clarifying contents or explanation for the question itself.
   c. **Choices**: if this is a question type which allows single or multiple choices, you can set the spectrum of choices and other parameters and restrictions
3. If you need to modify the question text in a larger window, select the question in question, click on the **Question Title** field, and click on **Open Visual Editor**. This will open up the text field in a

popup HTML editor. Clicking on **OK** will set the text and save the question.



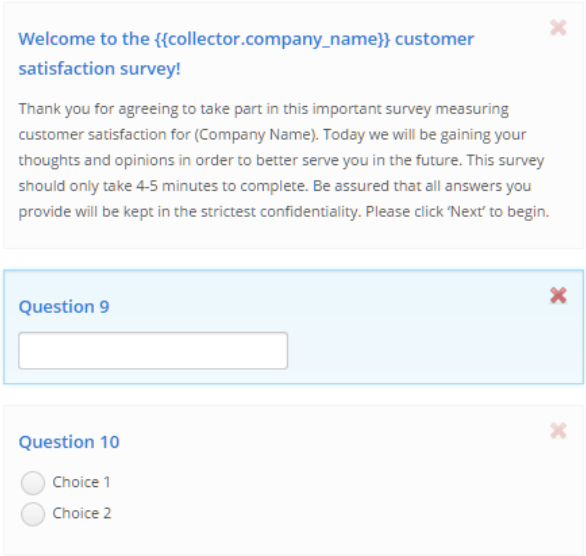
4. When you are done adding and modifying your survey questions, click on the **Save** button to save the changes (does not make the survey live), or click on the **Publish** button to deploy the survey

Re-arrange Questions

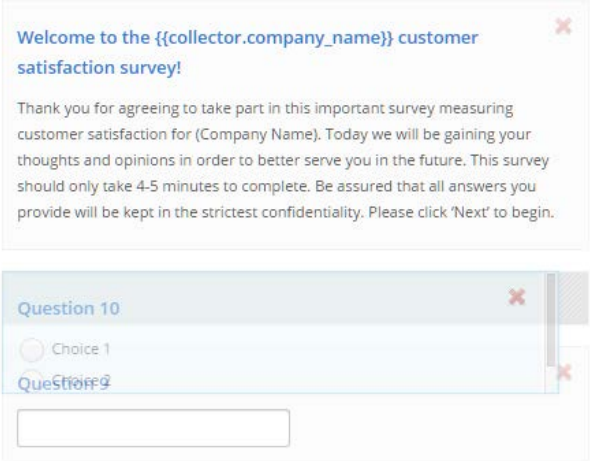
If you need to move any questions around on the page, it is simply a matter of using the drag and drop interface to move the questions.

To move a question,

1. Click on the question you want to move to select it



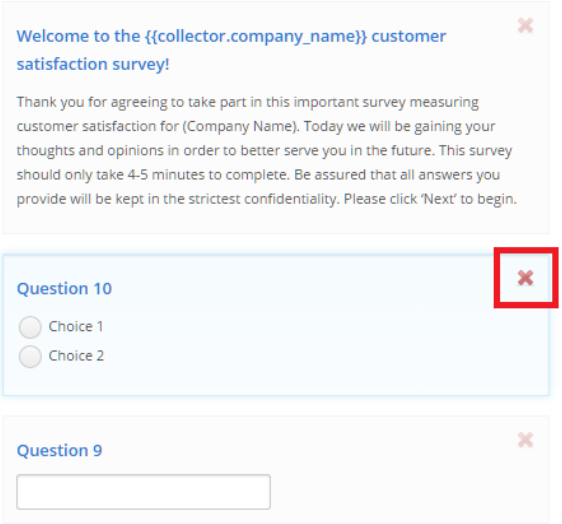
2. Then drag and drop the question into place



3. While dragging the question, you will see the interface change: the question being dragged will become translucent, and a dark grey placeholder will appear where the system will place the question if you drop it in place.
4. When done re-arranging the questions, click on **Save** to save the changes to the survey or **Publish** to deploy the changes.

Deleting a Question

If you need to delete a question, simply click on the red X in the top right corner of each question on the page.



Click on the **Yes** button to confirm your command.

Note that this action is permanent.

Setting Survey Pages

Adding Multiple Pages

You may need to set multiple pages for your survey, especially if you are setting up any kind of question branching. To do so, simply click on the **Page +** button in the questions editor window

A new page will always be created immediately after the current page you are on. E.g. if you are on page 3 of a 9 page survey, it will create a new blank page as page 4, and push all other pages down.

Re-arrange Pages

If you need to re-arrange pages, simply drag and drop them along the pagination row at the bottom of the survey editor interface

When dragging and dropping pages, the interface will display a dotted tab to indicate where it will place the page when you let go of the mouse.

Once you let go of the mouse, the system will automatically re-number all pages, in sequence.

Deleting a Page

If you need to delete a page, simply click on the red X that appears to the far right of the survey page, on the same row as the pagination

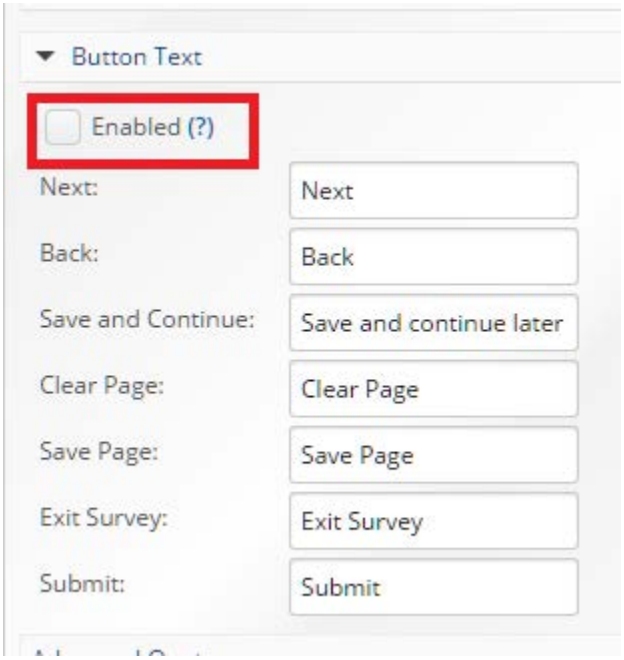
Note that all questions and branching on this page will be completely removed. You will lose all contents you have entered on the pages you delete.

Survey Options

Setting Up Survey Buttons

You can set the survey to display buttons on each page, such as saving the user's progress, clearing the page, or quitting the survey entirely. You may also change the text of these buttons, if you require

1. Open the survey you want to change the item text
2. Click on the **Page** tab in the survey options pane, and expand the **Button Text** section
3. Check the Enabled box to turn these buttons on



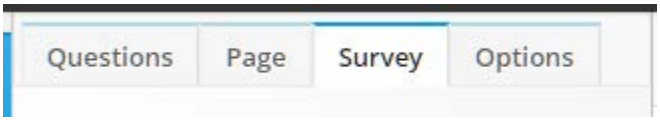
4. And if necessary, change the text for the buttons in the fields below.
5. When finished, click on **Save** to save the changes, or click on **Publish** to deploy the changes to the live survey

Creating a Survey Template

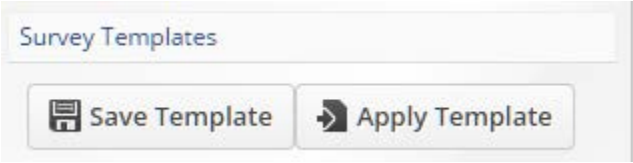
Sometimes you may need to create multiple surveys with identical or very similar questions and pre-ample. If that is the case, you may create a survey first, ensure it is built to requirements, and then save it as a template. Then in the future you can simply apply this Template to any new surveys you create to save time.

To create a survey template,

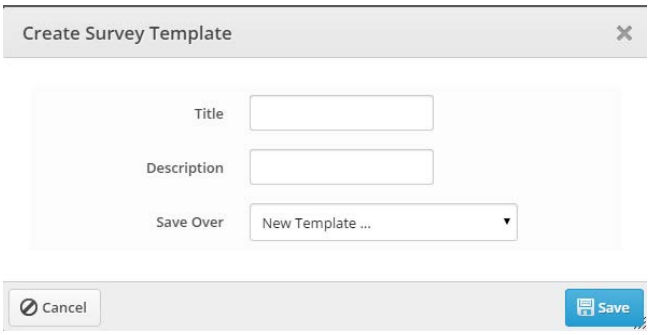
1. Create a custom survey as you normally would
2. Ensure you **Save** the survey. You need not **Publish** the survey.
3. Click on the **Survey** tab in the survey options pane



4. Click on **Save Template** in the **Survey Templates** section of the survey options pane



5. You will be prompted to enter information about the template you wish to create. Fill in the necessary information



   a. **Title**: the name of the template you want to use
   b. **Description**: if you have many templates of a similar nature, provide a description to explain the differences between each
   c. **Save Over**: if this template is intended to replace another template, select the template to be replaced here.

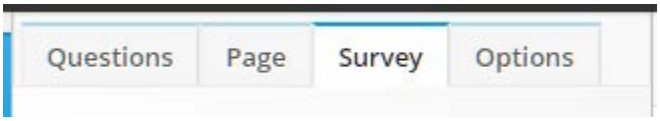
Applying a Survey Template

If you have already created a survey, with or without a template, but realize you wish to use a different survey template, you can do so.

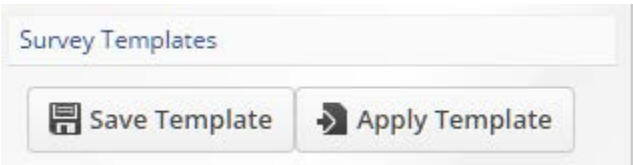
Note that this will replace the entire survey with the pre-defined template properties. This means that any custom questions will be removed or replaced.

To apply a survey template to replace the existing one,

1. Open the Survey you want to apply the template to
2. Click on the **Survey** tab in the survey options pane



3. Under the **Survey Templates** section of the survey options pane click on **Apply Template**



4. In the **Apply Survey Template** popup, select the Template you wish to apply under the **Available templates** dropdown list
5. If you wish to preview what the new template will look like, click on the **Preview** button

6. Once you have confirmed it is the survey template you want to use, click on **Apply**.
7. Click on **Yes** to confirm that you want to replace the current template with the new one you have selected above.

Advanced Survey Options

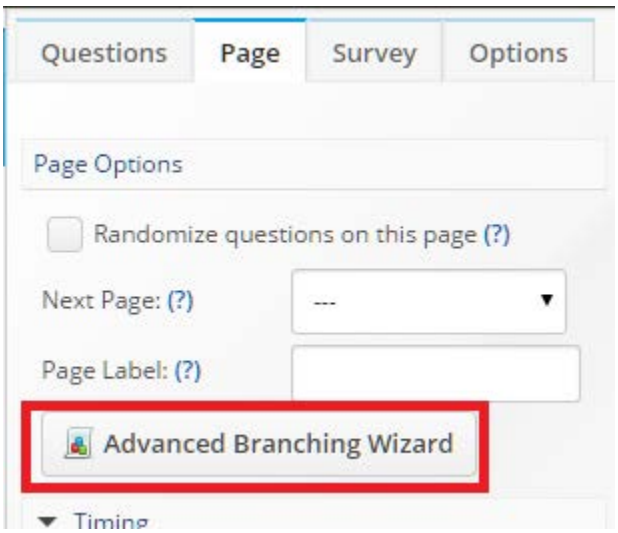
Branching

Branching is used to skew the collection of responses depending on the user's previous responses. For example, if your survey requires that users only answer a specific subset of questions based on their age range, you can set up Branching to force the survey to only display Page 2 for users between 0 – 18, display Page 3 for users between 19-35, display Page 4 for users between 36-50, etc.

Branching requires that there be a condition and action to follow when that condition is met. Using the example of age ranges above, the condition is which age range the user selects (0-18, 19-35, 36-50), and the rule is the action the Branching must take (display Page 2, display Page 3, etc.) depending on which condition is met.

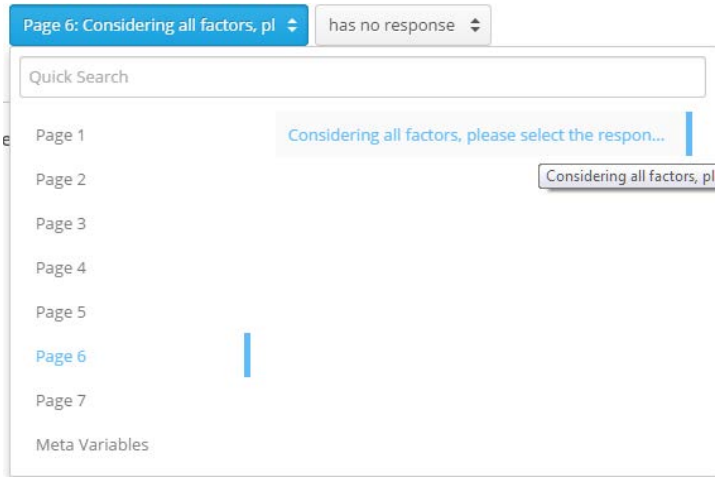
To enable and configure branching in a survey,

1. Open the survey you want to enable branching in
2. Select any question, open the **Page** tab in the question pane, and click on **Advanced Branching Wizard**

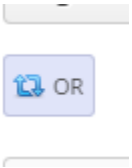


3. Click on **+ Add Branching Rule** or **Add a new rule >>**
4. Click on **Add a condition?** To add a condition which this rule must follow

5. From the dropdown list that appears, select the question that this condition belongs to



   a. You may have to select the Page before you can select the question
6. Depending on the question you have selected, you will have to set the conditional answers that trigger this rule.
   a. E.g. If a satisfaction survey, you may set the branching logic to trigger when a user answers **Dissatisfied** and **Very Dissatisfied**
7. If you require multiple conditions to be met for this rule, click on **+ Add Rule** below the list of Conditions. This will apply a default AND operator to all the rules, meaning all of these conditions must be met. If you wish to use the OR operator, just click on the button between conditions



8. Set a Rule Action: Set what you would like this trigger to do, such as skip to a specific page or show or hide a question.
9. Click **Save Rule** to save this Condition and Rule set.
10. You can then add additional Conditions and Rules this way.
11. Click **Save Changes** to save the conditional branching

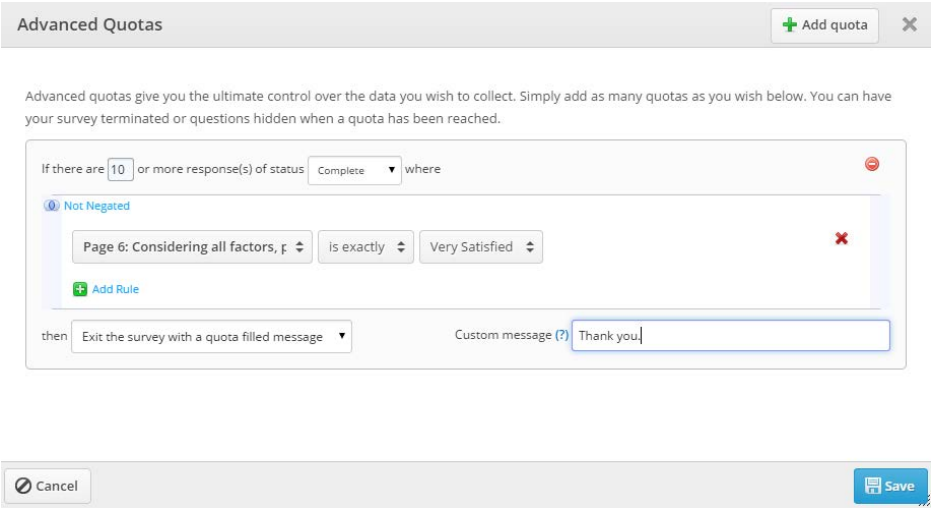
Note where and how Rules are added. If on the **Advanced Branching Wizard** window, adding multiple **Branching Rules** means that any of these conditions can be met for their Actions to be carried out. However adding multiple Rules when on the **Edit Rule – Rule Condition** list means that any or all conditions must be met for Actions to be carried out.

Setting up Quotas

Quotas are used when you want to collect only a specified amount for your questions. For example, if you are setting up a study wherein you require specific sample sizes, you can do so by setting up quotas.

To setup a quota,

1. Open the survey you want to enable branching in
2. Open the **Page** tab in the question pane, and click on **Edit Advanced Quotas**
3. Click on **+ Add quota** in the top right corner
4. Set up the conditions for the quota



   a. Set the number of responses of a specific question
   b. Set the question and response(s) to run the quota against
   c. Set the action to take place once the quota has been met
5. If this quota requires multiple conditions, click on **Add Rule** to add additional conditions
   a. You may set the operand to AND or OR depending on your requirements
6. If you need to set more quotas, click on the **+ Add quota** button in the top right corner
7. Click **Save** to set this quota.

Variables

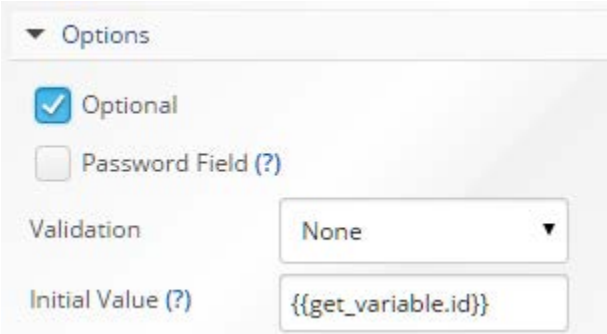
It is possible to further customize a survey by using HTML GET commands to retrieve information from elsewhere to be placed into the survey. For example, you may retrieve a person's first and last names to be placed into the survey to customize it, without their need to enter it in first.

To set up variables, they have to modify a question's Initial Value using variable calls.

One typical way of setting up a variable,

1. Open the survey you want to enable branching in
2. Select the question you want to configure a variable for.

3. Open the **Options** tab in the question pane, and expand the **Options** section



4. In the **Initial Value** field, enter {{get_variable. _____}}, where the ____ blank is replaced by the variable to be read.
    a. E.g. if the URL query parameter is “fname” then the Initial Value should be {{get_variable.fname}}
5. Click on **Save** to save the question

More information on Variables can be found on the FluidSurveys Help Documentation website: http://help.fluidsurveys.com/articles/en_US/using-get-variables

Styling

Due to the Enterprise license, there is little to no ability to completely customize a survey. The only template that is available to users is the general UBC template.

Users may customize a default template (that comes with FluidSurveys) with basic settings.

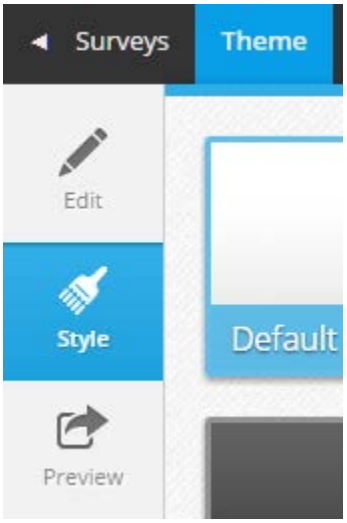
Themes

FluidSurveys comes with a few preset templates, as well as a general UBC-wide template. All templates are responsive so surveys will behave on all device types.

Applying a Theme

To simply apply a default theme on the survey,

1. Open your survey
2. Select **Style** from the survey options in the primary menu



3. From the Themes menu, select the **Theme** you would like to start with
4. In the preview pane on the right, it should automatically apply and display the new Theme
5. Click on **Save** to set this as the new theme for your survey

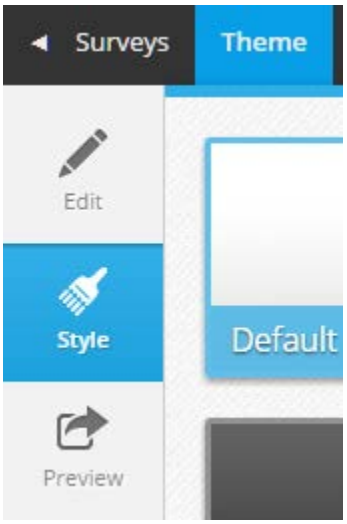
Applying the Standard UBC Theme

As part of the Enterprise license, we were allotted one completely custom theme to be used across the entire instance – this is the UBC CLF theme.

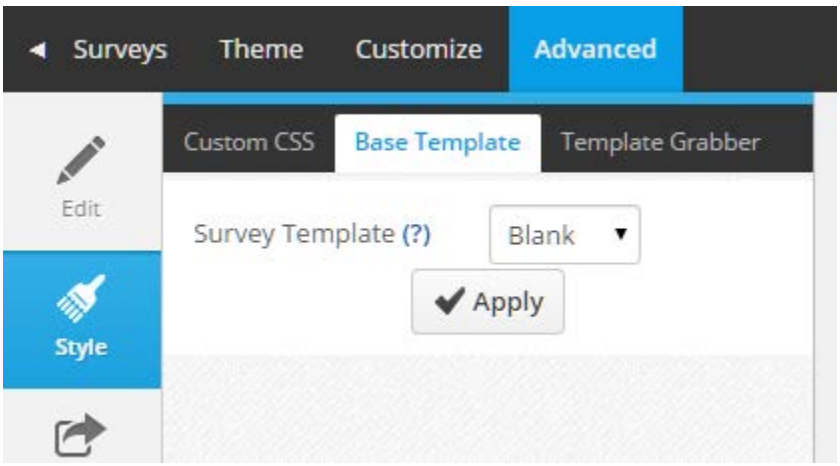
To apply the UBC CLF theme for a survey,

1. Open your survey

2. Select **Style** from the survey options in the primary menu



3. Click on the **Advanced** tab and select the **Base Template** tab to open up the Template engine



4. From the **Survey Template** dropdown list, select **UBC**
5. Click on **Apply** to set the template
6. Click on **Save** to set this as the theme to the survey

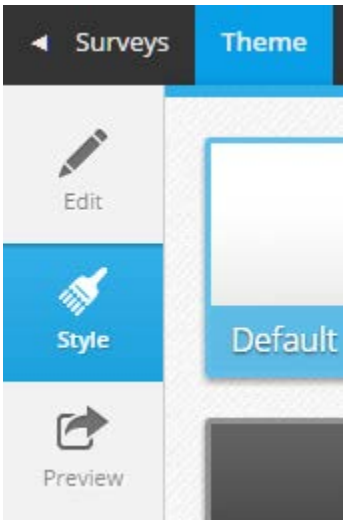
Modifying a Theme for a Survey

Once you have selected a theme, you can modify it further to fine-tune certain items that are displayed.

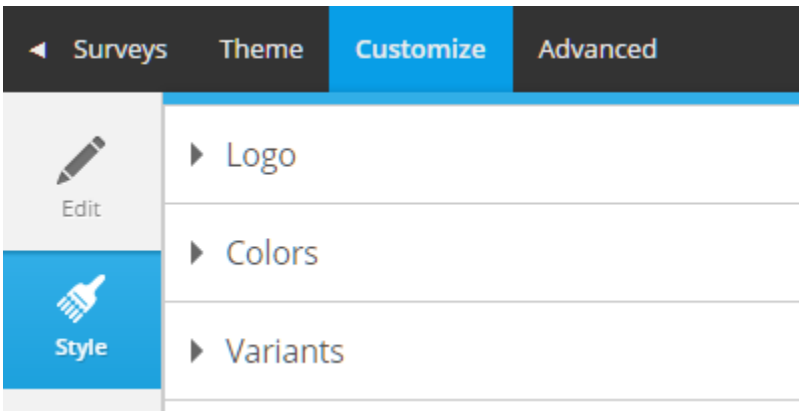
To modify a theme for a single survey,

1. Open your survey

2. Select **Style** from the survey options in the primary menu



3. Click on **Customize** in the menu to open up the options

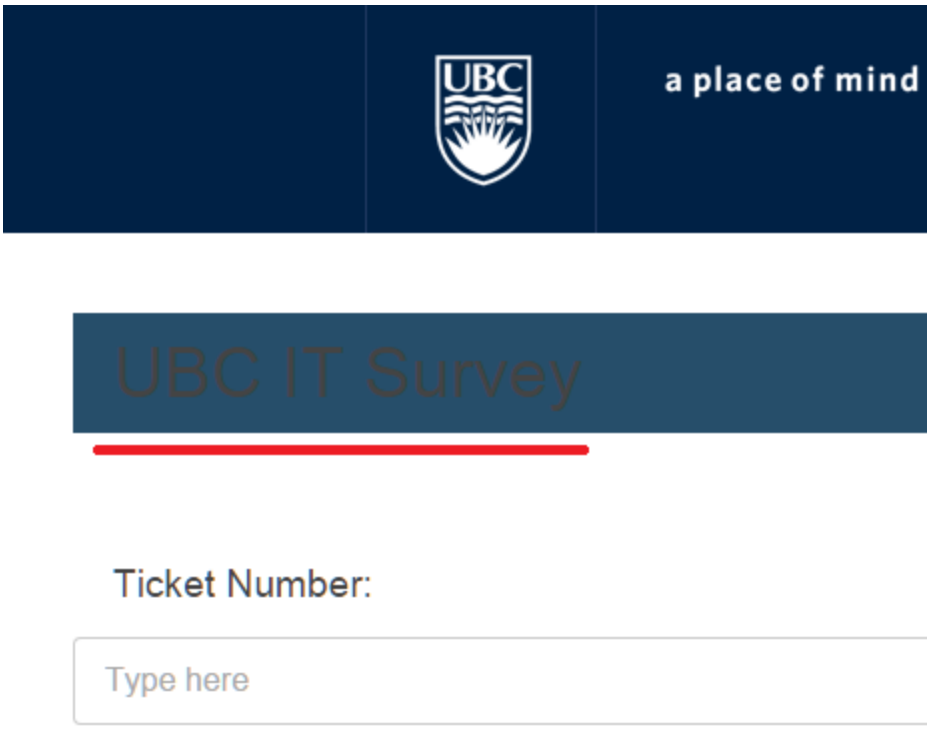


4. Click on any Customizable theme item to view its options, and make changes as necessary
5. Click on **Save** to save all these changes.

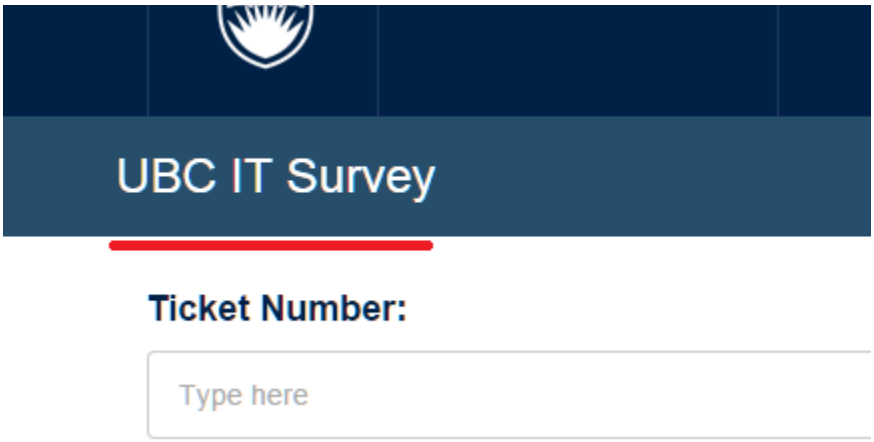
Note that you cannot modify a pre-created Theme such as the UBC CLF theme.

Known Visual Bug with UBC CLF Theme

There is a known bug with the UBC CLF Theme that only affects how it appears in the Theme preview. The bug causes the survey's title to appear as dark grey text on the UBC Grey banner section:



Whereas with the live published survey, it appears correctly:



This is caused by some Javascript built into the FluidSurveys backend that causes styling to break. This is a known issue that has no impact on surveys and collecting responses, and cannot be fixed without negatively impacting the functionality of the FluidSurveys backend.

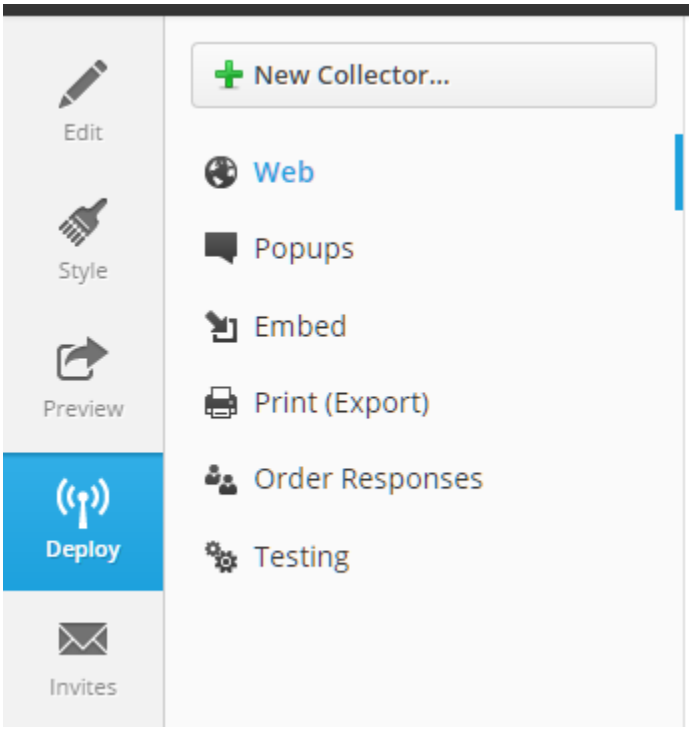
Publishing Surveys

There are several options for publishing completed surveys to the public, each with their own set of options.

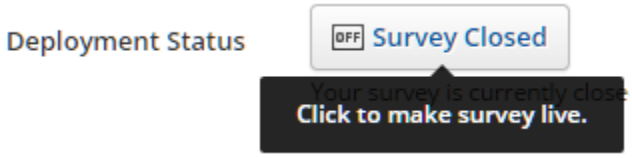
Deploying Survey

Once you've finished building or editing a survey, you have to publish it to the web. Usually clicking on the **Publish** button at the bottom of the survey question editor automatically publishes a survey and generates a URL for you. However, you can manually publish a survey as you require.

1. Ensure that the survey questions are saved.
2. Click on the **Deploy** button in the primary survey options pane, and select **Web** from the list of options



3. The **Deployment Status** should read "Off Survey Closed" if the survey is not live. Click on the button to turn on this survey, or make it Live



4. Your survey is now live and ready to collect responses

Customizing the Survey URL

By default, all surveys will build the URL based on the following scheme:

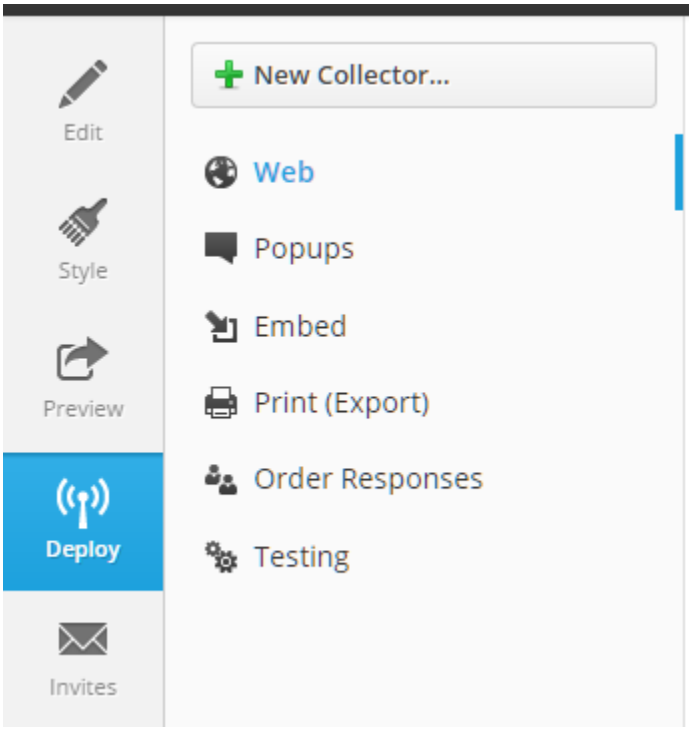
https://survey.ubc.ca/surveys/***username***/***surveytitle***

where **username** is replaced with your nickname in the system, and **surveytitle** is replaced with a shortened version of the survey title.

This can be customized, however customization brings a slight change to the URL structure as well, shortening /surveys/ to just /s/.

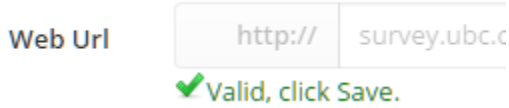
To customize a survey URL,

1. Ensure that the survey questions are saved.
2. Click on the **Deploy** button in the primary survey options pane, and select **Web** from the list of options



3. Check that the Web URL is already available.
4. Click on **Customize** beside the URL, and enter your new URL

5. As you type the new URL, the system will automatically check that the URL is available. If it is not available, i.e. someone else has already used that particular URL, it will inform you



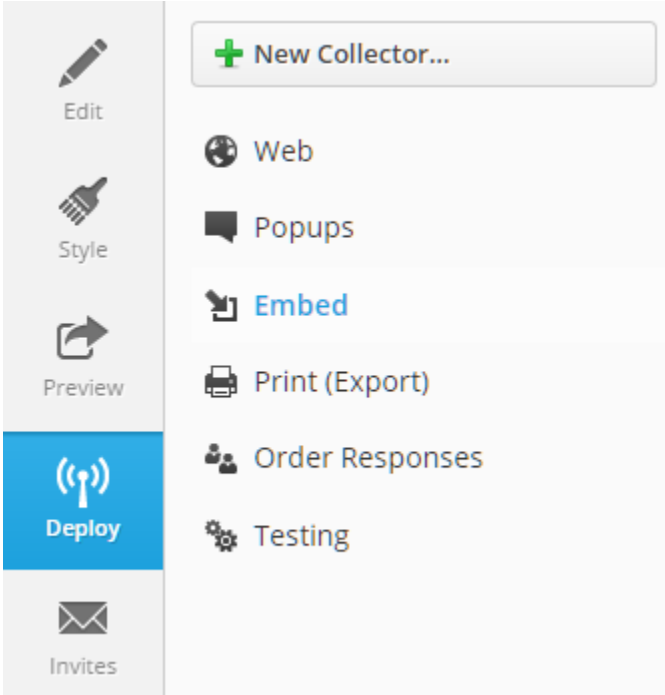
6. Click on the **Save** button to set this URL for the survey. Note that the previous default generated URL will no longer work.

Embedding Surveys on to Websites

Like any other web content, surveys can be embedded on to websites. The FluidSurveys system automatically generates HTML and Javascript code to simplify this process for you.

To embed a survey or poll on a website,

1. Ensure that the survey questions are saved.
2. Click on the **Deploy** button in the primary survey options pane, and select **Embed** from the list of options



3. If no embeds exist, click on the **+ Add New Embed Deployment** button and enter a name for this Embed object
4. Here you can set the different visual styles for this Embedded survey object. Note that you can use a different survey style if you prefer.
5. Once all survey options have been set, scroll down to the base of the Embedded survey options to view the code snippets.
    a. **Embed Code** will provide you with Javascript to be placed on the webpage. This is the preferred method of embedding a survey on a website, as it adjusts the side of the embedded survey to the size of the survey itself.
    b. **IFrame Code** will provide you with raw HTML to be placed on the website. It will display the survey in an iFrame object, which may crop some areas of the survey, causing scroll bars to appear. **Embed Code** is preferred for aesthetic reasons.
6. If you prefer to build your own embedded object, you can simply take the **Web URL** and use it in your own code snippets on your website or web application.

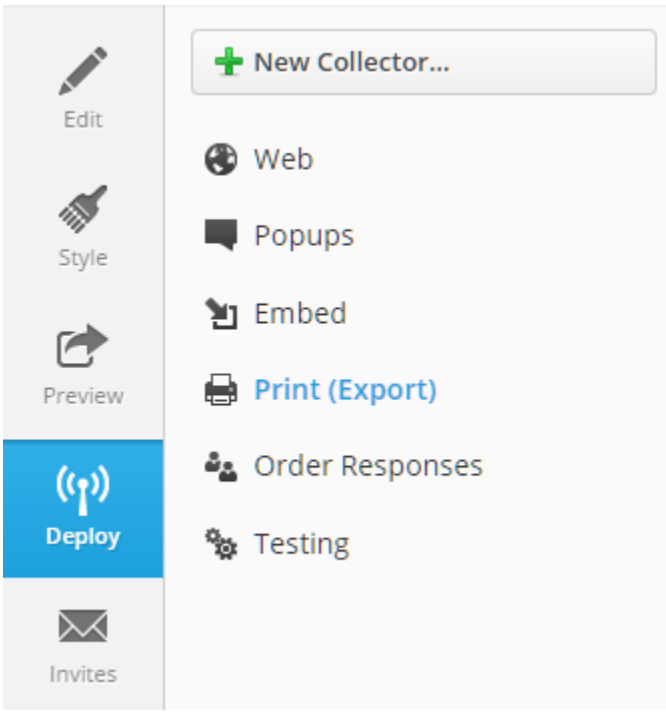
Print Your Survey

Occasionally you may need to print your survey on paper to distribute by hand. If so, you can export your survey to a file format before printing them.

This is also another excellent method of archiving your survey for permanent storage.

To prepare your survey for printing,

1. Ensure that the survey questions are saved.
2. Click on the **Deploy** button in the primary survey options pane, and select **Embed** from the list of options



3. From the list of **Export Format** select the one that you want to use
4. Depending on the **Export Format** you selected, set the options as required
5. Click on **Export Survey >>** to create the document version of the survey and download it to your machine.
6. Note that you may still need to open the document and modify its contents a bit to ensure proper formatting. The Exporting feature sometimes cannot format and render some custom HTML in the Question Titles.

Responses

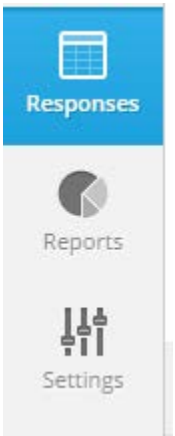
After a survey has been closed, or even during the survey campaign run, you can collect and analyze responses to the survey within FluidSurveys. You can run metrics against live data, or export data to be used in other applications.

View Survey Responses

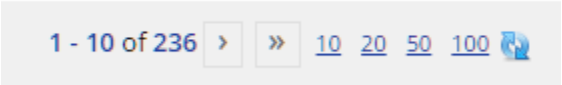
This is the easiest and default method of collecting responses in FluidSurveys. It is the most flexible method for gathering responses to be used elsewhere

To view all responses to date,

1. Click on the **Responses** button in the primary survey options pane,



2. You will now see a list of responses, broken down by denomination. You can set the denomination in the bottom row of the list



Collect/Export Survey Responses

If you need to take the responses and process them outside of FluidSurveys, it is very simple once you have access to the list of responses.

1. From the Responses list view, click on the **Export Responses** button
2. Set the **Export Format** you want to export the responses to.
    a. Note that you can only select **PDF** and **Word** formats if you have selected specific responses from the Responses list view. This is because the exported results appear in a format that is laid out with readability in mind (i.e. not a table format, rather a linear text format).
3. Set the **Advanced Options** you required
    a. Note that most of these options are not necessary for exporting raw data. This is more useful when attempting to set explicit limitations on fields to ensure compatibility with third-party applications. Usually the default Export settings are more than enough.
4. Click on **Download** to begin export process and download the file containing the responses.

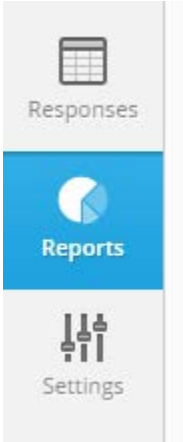
Generate Reports

If all you need is to get a snapshot of the current responses, a Report may be more appropriate than to generate an entire list of responses to be plugged into a third-party application for viewing.

Reports give you instant access to the status of the responses using graphs and charts.

To generate a report,

1. Click on the **Reports** button in the primary survey options pane,

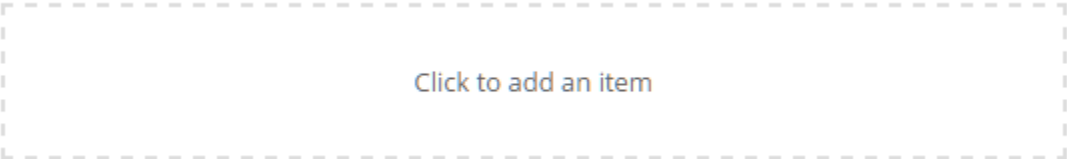


2. You should now see a list of all reports you have created for this survey, as well as a preview of the Dashboard or preset report
3. Click on **+ New Report** to begin generating a new Report
4. Enter a **Name** and select which **Report Type** you would like to use
    a. If you selected **Custom Report Type**, then you must set the option for this report
5. Click on **Create Report >>** to generate the report

By default it will list all questions at the very top, allowing you to view their raw responses. Below it will display all possible data in graphical format. You may edit each graphic by hovering over the graphic and select **Edit.**

The options here will specifically tailor the graphic to the settings you choose. You may also change the graphic type from these settings.

If you need to add another data set to this Report, click on the open area at the bottom **Click to add item**



You can then select which question to collect the data set from, as well as what options to use to display this data set in the report

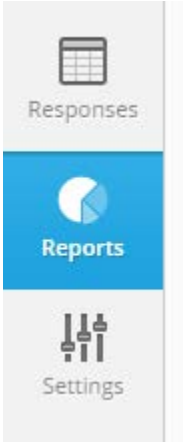
Scheduled Emails

If you have a longitudinal survey running and you would like to have automated reports generated and sent to you at intervals, you can set that up.

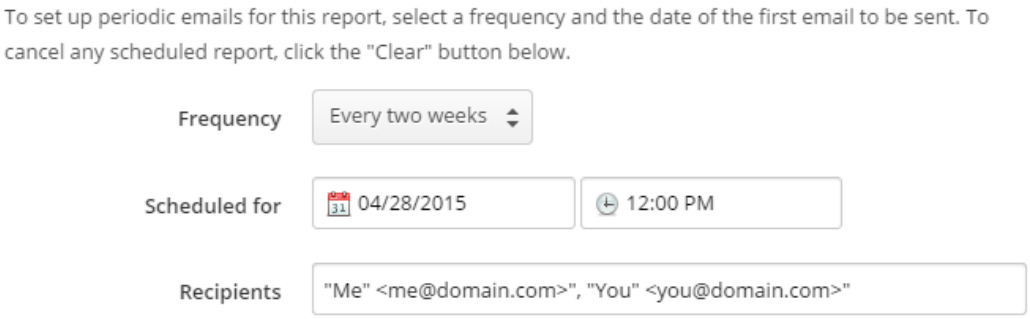
Note that you can only set up one Scheduled Email per Report. To have multiple Scheduled Emails, you must set up multiple reports.

To set up these emails,

1. Click on the **Reports** button in the primary survey options pane,



2. Select the Report you want to schedule emails for
3. Click on the **Advanced** button in the menu and select **Scheduled Emails**
4. In the **Schedule Report** window, set the **Frequency** which you want this report to run and set the start date and time under **Scheduled for**. Then set the **Recipients** email addresses, following the formatting in the field preview



5. Click on the **Apply** button to set the schedule Report

Contacts, Campaigns, and Emails

If you have a long-term program which will contain many surveys over time, it is worth setting up a campaign that allows you to keep track of the users you send surveys too, as well as the messages you send out.

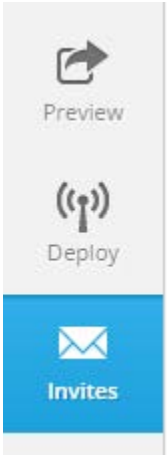
Composing a Message

Part of a campaign is sending messages out to your recipients to invite them to take participate in your survey.

These messages include variables that allow you to customize the message to address the recipients, as well as include tracking information for the specific users.

To create a new message,

1. Click on the **Invites** button in the primary survey options pane,



2. Select the **Compose** option in the menu to start a new message.
3. In the **Compose Your Invitation** window, set the following information
    a. Sender: make sure it follows the Firstname Lastname <email@address.com> format
    b. Subject: the subject line of the message you will send out
    c. Message: the body of the email you will send out. You may include any variables available to you by clicking on the appropriate item in the **Insert** toolbar in the editor window.
        i. Note that all variables appear as [variablename] in the message preview, as these are not set to their proper values until the message has been sent.
4. In case you need to save the message and return later, you may click the **Save Draft** button. This will only save a single draft at a time, however, and there is no revision history for drafts.
5. Below the Compose Your Invitation section is **Recipients**. Here you set who you will send your message to. You may add Recipients directly as individual contacts, or if you already have contacts from your Address Book or a List, you may add them from there
    a. To add an individual contact, click on **Add Contacts** and then **New Contact**. Enter the necessary information as prompted
    b. To add Contacts from your Address Book, click on **Add Contacts** and then **From Address Book**. Select the contacts you want to add, and then click **+ Add Selected**
    c. To add an entire List of contacts, click on **Contact Lists** and then select the **List** from the drop down menu.

Once you have composed your message, you may preview it by clicking on the **Preview & Send** button. This will display your email back to you in preview mode, so that you may proofread the message before sending. If the message is correct, clicking the **Send >>** button will compile the message with the proper names and survey links (including invitation codes) and send it out. If you wish to preview the message in your email inbox, you may click the **Send Test Message** button. It will ask you for the name and Email address to send the preview to. Preview emails *do not* include complete survey invitation URLs, they will still show up as variables such as [Invite Link].

Address Book and Lists

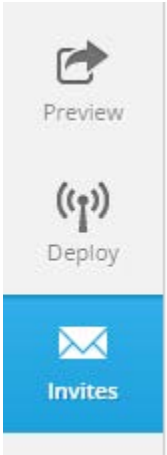
If your campaign is expected to last a while, and you will be sending numerous messages to the same recipients, it is worthwhile to set up contacts in the Address Book and organize them into Lists.

The Address Book stores all contacts within your account, regardless of which campaign they belong to.

Lists store certain contacts from your Address Book, allowing you to organize them as required, making it easier to send out messages to subsets of contacts in your Address Book.

Edit the Address Book

1. Click on the **Invites** button in the primary survey options pane,



2. Select the **Address Book** option in the menu to open the list.
3. To add a single Contact, click on **Add Contacts** and then **New Contact.** Fill in the Name and Email Address field, and click **Save Contact**

Importing Multiple Addresses

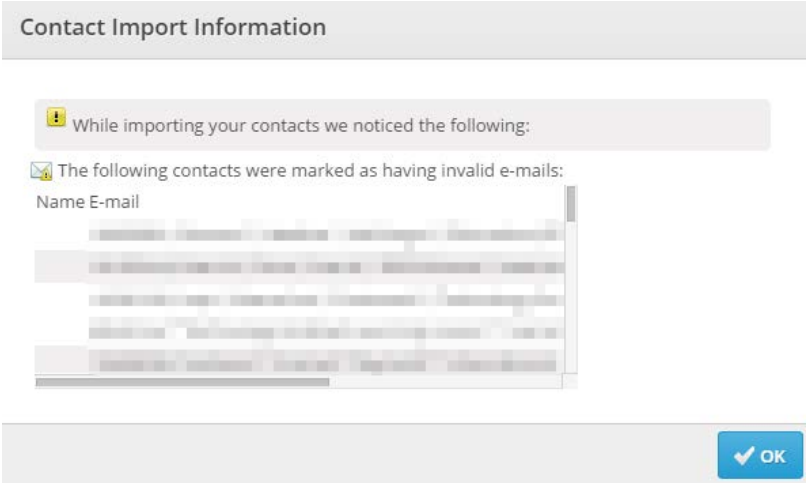
If you have multiple contacts that you wish to add to the Address Book, you may do so by importing a spreadsheet file. It only accepts XLS and CSV files.

1. Click on the **Invites** button in the primary survey options pane,

2. Select the **Address Book** option in the menu to open the list
3. Click on **Add Contacts** and then click on **Import Contacts**
4. Click on **Choose File** to upload the spreadsheet containing the contact information
    a. If you are unsure how to format the spreadsheet correctly, refer to the link **What should my xls or csv look like?**
5. Once the file has been uploaded, click on **Add Imported Contacts** to start the process.

If successful, you will see the contacts immediately appear in the Address Book. There is no confirmation for a successful import.

If something went wrong during the import, you will receive a warning message indicating the issue. For example, if email addresses are detected as being incorrectly formatted, it will provide a warning screen like



Lists

A List is a subset of Contacts in the Address Book. While the Address Book contains everybody you have stored, Lists contain only those you have specially selected, making it easier to organize your Contacts into Groups.

To create a List

1. Click on the **Invites** button in the primary survey options pane,

2. Click on **My Lists +** option in the menu to open the list
3. Enter a name for this List. Ensure it is a unique name, so it is easily identifiable.
4. Add contacts to this list.
    a. Depending on your Contacts, you may add them directly here as **New Contacts**, you may **import a contact list xls/csv file**, or you may select contacts from your **Address Book**

Analytics and Tools

As part of the invitation/campaign system, you may track messages that are sent out to users.

The analytics are not completely comprehensive, but they give enough of a picture to let you know how well your campaign is going on a general basis, enough to make slight adjustments if you aren't reaching your target audience.

To view your analytics,

1. Click on the **Invites** button in the primary survey options pane,

2. Click on **Statistics** option in the menu to open the list
3. In the pane on the right, you may view the statistics across all messages sent out for this survey. You can break down the statistics into periods (Day, Week, Month, Year) as well as by the individual messages sent out thus far.