
LEADPRO 24|7

Online Survey Builder Software

Survey Deployment and Data Collection Quick Reference Document

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www.LeadPro247.Com

Note: The cloud based on-demand survey system is frequently updated to incorporate new features and enhance existing functions. Hence this document may not reflect the current system features and functions. Please check our blog resources or contact the support team for details.

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LeadPro 24|7 Online Survey System

LeadPro 24|7 Survey Builder is a cloud based survey software system suitable for students, research institutions, businesses of all sizes and non-profit organizations. The survey tool is available in three editions including a free version with comprehensive features. Surveys can be designed, created and deployed in minutes and the response data can be viewed online in real time.

Survey Creation

Online survey questionnaires are created using the Surveys → Survey Definition module after logging into the Survey Builder system. The existing survey properties can be edited using the respective icon provided against each survey. For more information on survey creation steps including starting a new survey, selecting a theme, specifying survey properties and entering the survey questions, please refer to the survey creation documentation.

The screenshot displays the 'Survey Definition' interface. At the top right, there are links for 'Logout | FAQ | Help'. Below this is a 'Search / Filter Surveys' section with input fields for 'Survey Name', 'Survey Title', 'Survey Category', and 'Owner'. There are also dropdown menus for 'Status' (set to '--All--') and 'Creation Date' (set to '--All--'). Action buttons for 'Search', 'Reset', and 'Define a New Survey' are present, along with a 'Records/Page' dropdown set to '25'. Below the search section is a table with the heading 'Use the links below to Update / View the Survey Components'. The table has columns for Survey ID, Survey Name, Created On, Status, View, Theme, Properties, Questions, Pages, Collectors, and Preview. Three surveys are listed: 100080 (Public School Survey, Non-Profit, created 04/22/2009, status Inactive), 100070 (Event Feedback Survey, Market Research, created 04/22/2009, status Stop), and 100040 (Educational Survey, Market Research, created 03/26/2009, status Stop). A legend at the bottom indicates that green circles represent Active status, red circles represent Inactive, and orange circles represent Draft.

Survey ID	Survey Name	Created On	Status	View	Theme	Properties	Questions	Pages	Collectors	Preview
100080	Public School Survey Public School Survey (Non-Profit)	04/22/2009	Inactive	Activate	Star	Wrench	?	Document	Collectors	Preview
100070	Event Feedback Survey Event Feedback Survey (Market Research)	04/22/2009	Stop	Stop	Star	Wrench	?	Document	Collectors	Preview
100040	Educational Survey Educational Survey (Market Research)	03/26/2009	Stop	Stop	Star	Wrench	?	Document	Collectors	Preview

Survey Status Indicators: ● Active ● Inactive ● Draft

Survey Deployment

Once the survey questionnaire is built in the survey definition module, the survey can be deployed for getting survey responses from the respondents. The survey responses can be collected using one or more collectors. A collector can be considered as a bucket for collecting responses from a set of respondents (or deployment source). For example, responses collected from the corporate website can be assigned to one data collector; responses from email recipients could be designated to another collector. Responses received via email invitations via the Survey Builder system needs to be collected via another type of collector.

Response Collector Types

The Survey Builder system supports the following four types of response collectors (or deployment types):

- **Web URL Link collector**
- **Email Invitation collector**
- **Website Popup collector**
- **Manual Response Entry collector**

Depending on the survey requirements, one or more collectors can be defined for each survey. However, only one manual response can be defined per survey, if required.

Collector Definition

When the survey questionnaire setup is completed, the collectors can be defined in the final step. If the survey is new and no collectors are defined, the definition page will not list any collectors. If one or more collectors are defined already, the same will be listed on the page along with link icons for editing and deleting the collector along with the status of the collector.

The screenshot shows the 'Survey Definition' page with a navigation bar at the top containing 'Theme', 'Survey Properties', 'Questions', 'Custom Pages', and 'Collection Methods' (which is highlighted). Below the navigation bar is a 'Survey Information' section with fields for 'Survey Name: Public School Survey', 'Created Date: 4/22/2009', 'Created By: admin', 'Survey Title: Public School Survey', and 'Survey Status: Deactivated'. The main section is 'Response Collectors', which includes a text input for 'Collector Title *' containing 'Web URL based Data Collection' and a dropdown for 'Collector Type * (Select one below)'. The dropdown options are: 'Deployment using a web URL link' (selected), 'Deployment using a Pop-Up script', 'Deployment using an Email Campaign Invitation', and 'Manual entry of survey responses'. Each option has a brief description. At the bottom of the form are three buttons: 'Back', 'Browse Collectors', and 'Continue'.

The **Add New Collector** link displayed on the page is used to define a new collector for the survey. The first step in the collector definition is to select the collector type. Based on the collector type selected, various parameters need to be specified and saved.

Collector Properties

The properties to be specified in each collector will vary on the type of collector selected. However, some of the properties are common across the types.

Collector Name / Title: This property need to be specified for each collector defined for the survey.

Logging IP / Email Address: If this property is not enabled, then the survey responses will be treated as anonymous. Also, Email Address will be logged only when the invitation is sent via the Survey Builder system and the survey is not designated as anonymous.

Cut-off Date and Time: A cut-off date can be specified for each survey response collector.

Maximum Response Count: A quota (in terms of response count) can be specified for each collector.

Web URL Link Collector

The web URL based data collector is widely used to deploy the surveys on one or more websites. This collector can also be used to send the links via external email systems / clients.

Collector Title: Web URL based Data Collection

Collector Type: Deployment using a web URL link (Using this option, you can generate a URL link and include it in your websites, emails and other invitations.)

Multiple Responses

Allow Survey to be taken Multiple Times per Computer? (Kiosk / Trade Show mode)

Allow Survey to be taken only once per Computer? (Website mode)

Sharing Survey Results

Keep it Private (Results not disclosed)

Restricted Access (Results shared at summary level, but individual responses kept private)

Make it Public (Results and individual responses shared to all respondents)

Editing Responses

Allow Survey responses to be Edited by Respondents?

Yes (Respondents can go back and edit responses)

No (Respondents cannot go back and edit responses)

Restrictions

Set a CutOff Date & Time

Set a Max Response Count

Log browser IP / Email Address

Include Password Protection

Enable IP blocking (Allow / Block) Each IP on separate lines

Collector Activation

Do you want to Activate this Collector? Yes No

[<< Back](#) [Generate Link and Save Collector](#)

Email Invitation Collector

When the survey invitations are emailed via email campaign module of the Survey Builder system, this type of collector should be used.

The survey invitation email message can be created using the **Campaigns → Manage Campaigns** module. The email list can be created and managed using the **Lists → Manage Addresses** module of the system. For more information on the survey panel list management and email campaign management functions, please refer to the respective documentation.

Please note that the Email Invitation Collector type is not necessary, if you are using an external email system or an email client such as Outlook; the Web URL Link type (explained above) can be used in such cases.

Website Popup Collector

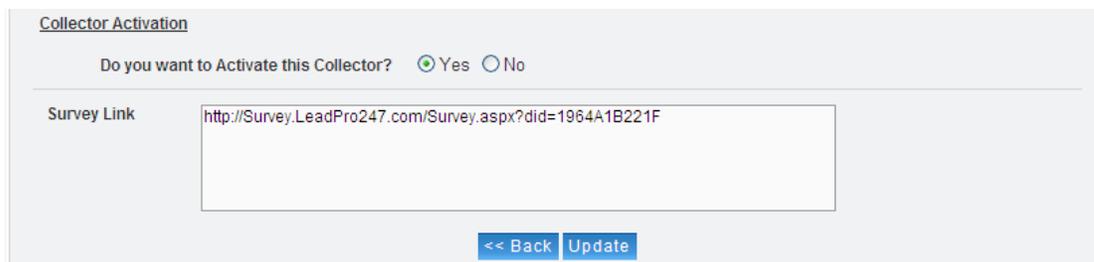
Website Popup Collector type can be used to embed the survey on websites as popups. The survey will popup in a small window based on the properties specified in the definition. The system will provide the script snippet necessary for embedding in the website. One or more collectors of this type can be defined per survey.

Manual Response Data Collector

If the survey responses are collected via telephone or paper surveys, then manual response data entry mode can be used by enabling this collector type. More than one manual collector need not be defined for each survey. This feature helps to consolidate online and offline survey responses and analyze the results.

Collector Activation

At the end of each survey response data collector, you can specify if you would like to activate the collector. Unless the collector is activated it cannot be accessed by the respondent.



Collector Activation

Do you want to Activate this Collector? Yes No

Survey Link

<< Back Update

The system will provide the URL link or the code snippet when a collector is defined. This link / code can be used to deploy the survey in the respective medium.

For Manual Response Data Entry Collector, no URL link will be provided. Instead the system will enable the data entry in the respective menu option (Surveys → Survey Data Entry).

Survey Activation

After defining the collectors, the screen will look like the following picture. The individual data collectors can be activated / stopped using the respective link.

The screenshot shows the 'Survey Definition' interface with the 'Collection Methods' tab selected. The breadcrumb trail is: Theme || Survey Properties || Questions || Custom Pages || **Collection Methods**. The 'Survey Information' section displays: Survey Name: Public School Survey, Created Date: 4/22/2009, Created By: admin, Survey Title: Public School Survey, and Survey Status: Deactivated. The 'Response Collectors' section has an 'Add New Collector' button and a table of defined collectors.

Collector ID	Collector Title	Created Date	Status	Status	View	Update	Delete
5000011	School	22-Apr-2009	Active	Stop			
5000014	Web URL based Data Collection	27-Jun-2009	Active	Stop			

Collector Status Indicator Active Closed

Survey Activation Confirmation

Do you want to Activate this Survey now? Yes No

[Back](#) [Continue](#)

* Indicates Required fields

Once the response data collectors are defined, the survey can be activated using the “Do you want to Activate this Survey now?” option. The survey can also be activated / stopped from the Survey Definition list page.

Survey Analysis

The survey responses can be viewed in real time using the Reports → Survey Reports option in the Survey Builder system. For more information on the survey analysis option, please refer to the Survey Analysis and Reporting documentation.

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