# **Creating and Publishing a Survey**

Market: Federal/State/Local, House, Senate

Description: These instructions teach users how to create and send a survey in IQ.

### Setting up Basic Survey Information

**1.** Navigate to **Outreach > New > Survey**.

ages 🗸	Outreach 🔨	
New		
eNewsletter Targeted Mailing eNewsletter Template Survey Web Form		

2. The IQ Survey Wizard is displayed on the screen and defaults to Setup. A sample survey is displayed.



**3.** Enter the survey **Name**, **Owner**, and **Description** in the appropriate fields. The default owner is set to the user who created the survey. Click **Save**.

Name:	
Sample Survey	
Owner:	
IQ Support	-
Description:	
This is a sample survey used for training.	

# **Building the Survey Content**

1. Select Builder.



- **2.** Select the format of the survey question.
  - a. Text Block allows a response to be typed in by the user in a text box format.
  - b. **Checkboxes** allow multiple responses or options to be selected. Lower and Upper Limit options are available with Checkbox questions. Upper and lower limits allow you to select options that range from the three most important (i.e. 1-3 answers are allowed). If a

question is marked as required and lower/upper limits are not populated, at least one response is required.

Required Lower Limit Upper Limit

- c. Radio Buttons allow a single response from a set of fields.
- d. Dropdowns allow a single response from a set of values displayed in a list box.
- e. Text Box allows response to be typed in a text box.
- Enter the Question and each Answer to include in the survey. If you select an Affiliation Code(s) to associate with one or more answer, that Affiliation Code(s) will be applied to the Contact Record when the survey is submitted.
- 4. Select the **Required** checkbox to indicate a response is required.
- 5. Select Add an "Other" Answer option to add an optional field to further clarify a response.



6. Select Change the way Answers are displayed to modify the display of the answers as needed.

Change the way Answers are Displayed								
Columns	Direction	Arrangement	Туре					
1	Horizontal	Question over answer	Checkboxes (multi value)					

7. Select Add Another Answer to display more answers available for the survey.

Add Another Answer

8. Select Save.

# **Reviewing Survey Content**

**1.** Select **Review** from the menu.



- **2.** Complete the fields to select the **Display** used for the survey:
  - a. "Embed this survey in the e-mail (if possible)" will allow recipients to complete and submit the Survey directly in the email itself.
  - b. "Show a link in the e-mail that opens the survey in a new window" will allow the recipient to select a hyperlink to open the survey.
  - c. "Show an image of the survey that opens the survey in a new window" will display the survey in the body of the email as an image. Selecting the survey image will launch the survey in a new window.
  - d. **"Show a custom image of the survey that opens the survey in a new window"** will display the survey in the body of the email as a custom image that you provide. Selecting the survey image will launch the survey in a new window.

Setup Builder Review	DRAFT Sample Survey	Actions 📀	Save Publish »
Display:	Preview Email Preview Standalone Edit Standalone HTML		
Embed this survey in the e-mail (if possible) *	Congressman XXXXXX		
Add Affiliations:			
Add these affiliations to all survey responders			
Remove Affiliations:			
Remove these affiliations from all survey responders			
Link Text: 10pt • Left O Center Right			
Click here to take Survey	Did you get your COVID vaccine?		
Submit Button	OYES ONO		
Alternate text for the submit button	Submit Click here to take Survey		
Automatically close this survey after a certain date?			
Yes No	Washington D.C. Office XXXX Office		
The second	XXXX House Office Building 111 XXXX XXXXX Washington, DC 20515 XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX		
Show results to the survey taker when completed?	РТКЛЕ, 202-225-2002 РТКЛЕ, 202-200-2002		
Yes No	Privacy Policy		
Thank you message:			
Thank You!			
Redirect to:			
Redirect to this URL when the survey taker has completed the poll			

**3.** Select **Save** at the top right-hand corner of the module.



#### Publishing a Survey

**1.** Select **Publish** top right-hand corner of the module.



- **2.** Select an option from one of the selections in the dialogue box.
  - a. "Publish this survey for use in outgoing email" allows the survey to appear directly in the body of the email as text, a link, an object, or an image.
  - **b.** "Start an outreach mailing based on the content of this survey" allows only the survey to be delivered to constituents without an email message.
  - **c.** "Publish this survey as a new standalone web form" allows the survey to be accessible via a web page.



3. Select Publish. The survey is published and ready to be included in web pages, emails, and

**Note:** If IQ encounters any errors while trying to publish the Survey, the dialog will remain open with the list of errors that requires correction.

eNewsletters.

### **Using Survey In Row Actions**

**1.** After a survey has been created, you can apply the following in-row actions towards the survey.



a. **Modify**: This action is displayed for surveys that have been **published** or **closed**. It enables users to make changes to these surveys.

- b. Publish: This action is displayed for surveys that are in Draft Status. It enables users to make publish the survey. Once published, the status for the survey changes from Draft to Published.
- c. **Copy**: This action is displayed for surveys that are in **Draft**, **Published**, or **Closed** status. It enables users to make a copy of the survey.
- d. **+Outreach.** This action is displayed for surveys that have been **published**. It enables users to create an outreach material (e.g., eNewsletter) using the published survey.
- e. **View Instapoll**: This action is recommended for surveys that have been **published**. It enables users to view the survey questions and responses, if provided.
- f. **Open in Excel**. This action is displayed for surveys that have been **published and have survey responses.** It enables users to download and view the survey responses in Excel.
- **g.** Close. This action is displayed for surveys that are in **Draft** or **Published**. It enables users to set the status of the survey to **Close**.
- **h.** Delete. This action is displayed for surveys that are in Draft or Published. It enables users to delete the survey.