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## *OVERVIEW*

Version 5.0    September 2007

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## Getting Started

All you need to get started with InstantSurvey is a Web browser and an Internet connection. You can create an account and start building surveys right away.

### This section includes:

- [Before you begin](#)
- [Creating an account](#)
- [Logging in and help.](#)

### *Before You Begin*

Before using InstantSurvey, ensure you have met the following requirements:

- You have an Internet connection
- You have Microsoft Internet Explorer version 5.0 or later, or Netscape Navigator version 6.0 or later, or Firefox 1.0 or later

**Note:** *While InstantSurvey does support a number of different browser applications, only the Microsoft Internet Explorer allows you to use the WYSIWYG feature in Advanced Editing. If you use Firefox, the advanced text editor can still be used for inserting text, HTML, images and piping, but will not display WSYWIG formatting.*

- You have a working e-mail account
- You have an InstantSurvey user account.

### *Creating an Account*

If your company has an InstantSurvey administrator, that person can create an account for you.

### To create an account

1. Select **My Groups** from the **Home** tab in the *InstantSurvey Navigation* menu. The *My Groups* page opens.

## Overview

My Groups - InstantSurvey

Home Create Distribute Report

Open a new, draft or finished survey

### My Groups

Edit Delete Invite CreateGroup

Name	ID	Company	Created	Groups	Users
------	----	---------	---------	--------	-------

page: 1 show: 10 | 20 | 50 | all records

### My Membership

Leave Group

Name	ID	Company	Group Owner	Owner E-mail	Users
<input type="radio"/> Association Surveys	851	GMI	InstantSurvey Team	InstantSurvey@gmi-mr.com	5011

page: 1 show: 10 | 20 | 50 | all records

### My Users

Edit Delete Create User

Name	E-mail	ID	Created
------	--------	----	---------

page: 1 show: 10 | 20 | 50 | all records

- In the *My Users* section, select **Create User**. The *User Creation* page opens.
  - On the *User Creation* page, enter the following required information for the New User:
    - E-mail Address*
    - First Name*
    - Last Name*
    - Company*
    - Language*.
- Note:** *InstantSurvey* is localized for the following languages: *English, Chinese (Simplified), French, German, Spanish and Portuguese (Brazilian)*.
- Click **Next**. You return to the *User Creation* page, with the *Groups* pane.

User Creation - InstantSurvey

Home Create Distribute Report

Open a new, draft or finished survey

### Groups

Include user into groups:

Name	ID	Company	Owner E-mail	Users
------	----	---------	--------------	-------

page: 1 show: 10 | 20 | 50 | all records

< Back Next > Cancel

- If you have Groups set up, you can select the groups you want to make this user a member of by clicking on the box and then clicking **Next**.

## Overview

6. The *User Creation* page opens with the *User Permissions* pane. Change the permissions for the user by clicking the appropriate boxes and then selecting **Next**.

Permissions	Inherited Permission	Allow	Deny
<a href="#">Account Management</a>	Allow	<input type="checkbox"/>	<input type="checkbox"/>
Create Users	Deny	<input type="checkbox"/>	<input type="checkbox"/>
Delete Users	Deny	<input type="checkbox"/>	<input type="checkbox"/>
Create Groups	Allow	<input type="checkbox"/>	<input type="checkbox"/>
Delete Groups	Allow	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Survey Creation</a>	Allow	<input type="checkbox"/>	<input type="checkbox"/>
Create surveys	Allow	<input type="checkbox"/>	<input type="checkbox"/>

7. (Optional) *Inherited Permission* indicates the default permission for the user. You can change the permission status by using the checkboxes in the *Allow* and *Deny* columns.

Function / Permission	Description
<b>Account Management</b>	Found in the <i>Home</i> page. See <a href="#">Creating an Account</a> for more information.
Create Users	Enables user to add other users. These users then “belong” to the first user (creator) under their account. Allow only if the user can have users below them in a hierarchy.
Delete Users	Enables user to remove other users from Instant Survey. Allow only if user should be able to remove other users.
Create Groups	Enables user to create groups of users. See <a href="#">Create a Group</a> for more information.
Delete Groups	Enables user to remove groups of users. See <a href="#">Delete a Group</a> for more information.
<b>Survey Creation</b>	From the <b>Create</b> tab.
Create Surveys	Enables user to write and create surveys in IS.
Edit draft surveys	Enables user to edit surveys which have not been finished.
Edit Randomize	Enables user to use the randomize feature. See the document on Distribution for more information.
Edit Custom Redirect	Enables user to direct respondents to a particular web page of choice upon completion of the survey.
Edit Custom Thank You page	Enables user to change the custom thank you page. See the document on Distributions for more information.
Delete surveys	Enable user to remove surveys.
Edit live surveys	Enables user to make changes to surveys as they are in progress. Allow only if you want user to be able to change a survey as respondents are answering.

## Overview

Function / Permission	Description
	<b>Warning:</b> <i>This is a potentially harmful capability if used incorrectly.</i>
Edit response choices in live surveys	Enables user to make changes to the options for answering survey questions. Allow only if user should be able to alter answer choices in surveys as respondents are taking the survey. <b>Warning:</b> <i>This is a potentially harmful capability if used incorrectly.</i>
Share Surveys	Enables user to share surveys among groups under their control or of which they are members. See <a href="#">My Groups</a> for more information on group membership.
<b>Distribution Management</b>	From the <b>Distribute</b> tab.
Distribute surveys	Enables user to send surveys to respondents.
Distribute surveys using email list	Enables user to send surveys to respondents using a list of e-mail addresses.
Manage distributions	Enables user to manage and edit options within active and finished distribution. See <i>Survey Management</i> in the document on IS Distribution for more information.
Delete distributions	Enables user to delete a particular surveys distribution. See <i>Distributed Surveys</i> in the IS Distribution document.
Send HTML e-mails	Enables user to send e-mails in HTML format containing the link to the survey. See <i>Invitation</i> in the IS Distribution document.
Change sender's e-mail	Enables user to change the e-mail address of the person or entity sending the invitation to the survey. Allow only if you want this user to be able to enter a different address than the default one that shows in the invitation. See <i>Invitation</i> the IS document on Distribution.
Change unsubscribe message	Enables the user to make changes or remove to the unsubscribe message that goes to respondents in the e-mail invitation. See <i>Invitation</i> and <i>Unsubscribe</i> in the IS document on Distribution. Allow only if you want this user to be able to make edit this message.
Preload data	Enables user to include additional data about respondents by preloading it through a CSV file. See <i>Preload and Mail-merge</i> in the IS document on Distribution.
Share Distributions	Enables user to share distributions among groups under their control or of which they are members. See <i>Permissions</i> in the IS document on Distribution. See <a href="#">My Groups</a> for more information on group membership.
<b>Audience Management</b>	From the <b>Distribute</b> tab.
Create Contacts	Enables user to create contacts to receive survey distributions. See <i>Audience Management / My Contacts</i> in the IS Distribution document.
Delete Contacts	Enables user to remove contacts from a list within their account. See <i>Audience Management / My Contacts</i> in the IS Distribution document.
<b>Reporting</b>	From the <b>Report</b> tab.
Get reports	Enables user to generate reports on distributions. See <i>Accessing and Viewing Reports</i> in the IS Reporting document.
Create custom reports	Enables user to create customized reports. See <i>Custom Reports</i> See <i>Audience Management / My Contacts</i> in the IS Report document.

## Overview

Function / Permission	Description
Delete custom reports	Enables user to delete custom reports. Allow only if you wish this user to delete reports that are generated with cross-tabs, tables, and other features. See <i>Custom Reports</i> and <i>Audience Management / My Contacts</i> in the IS Report document.
Create datasets	Enables user to filter and aggregate survey data into datasets. See <i>Datasets</i> in the IS Reports document.
Delete Datasets	Enables user to remove datasets. See <i>Datasets</i> in the IS Reports document.
Compare surveys	Enables user to compare and combine results from different surveys containing similar question sets.
SSL Report	Enables user to download data with a secure socket layer. Allow only if the user should download data using an extra security feature. See <i>Downloading Distributions</i> in the IS Reporting document.
Ability to export in SPSS format	Enables user to export data in the SPSS format. See <i>Downloading Distributions</i> in the IS Reporting document.
Share Reports	Enables user to share reports among groups of which they are a member. See <i>Sharing Reports</i> in the IS Reporting document. See <a href="#">My Groups</a> for more information on group membership.

8. Once you have selected permissions, click **Next**. The *Create Account* page opens, with the *Welcome Message* pane.

9. The *Welcome Message* pane shows the default welcome message that will be sent to the new user. You can modify the message here. The welcome message will be displayed in the language selected earlier.
- To change the language, click the down arrow in the *Language* drop-down list, select the preferred language, and click **Apply**. The welcome message will now be displayed in the new language selected.


## Overview

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- To see what the actual message will look like, click **preview**.
  - You can also choose not to send a welcome message by removing the check in front of **Send Welcome Message**.
10. Click **Create User** to set up the account. The *Create Account* page opens with the *Report* pane and displays a message that the user has been created successfully. The new user will be included under *My Users Info Panel*.
  11. If you wish to create additional users, click **Create Another User**. The following information will be pre-filled by the same information you used for the previous user (you have the option of changing it):
    - *Company*
    - *Permissions*
    - *Welcome Message*.
  12. Click **finish** when done.

## Logging In and Help

This section contains information about logging on to your account, logging off, and getting help.

Procedure	Description
Logging On To Your Account	<p>Log on to your account at <a href="http://www.instantsurvey.com">http://www.instantsurvey.com</a>, and click <b>Client Login</b> in the upper right. Enter your account e-mail and password and click <b>submit</b>. If your company has an InstantSurvey administrator, contact that person for the address at which to log on. If you forget your password, click the <b>Forgot your password?</b> link and enter your e-mail address at the prompt.</p> <p><b>Note:</b> For security reasons, your password will not be sent to your e-mail account. Instead, you will receive a message containing a link to a URL where you can create a new password.</p>
Logging Off From Your Account	<p>At any time, you may log off from InstantSurvey by clicking the <b>log off</b> link in the top right corner of the application window and clicking <b>OK</b> to confirm.</p>
Getting Help	<p>At any time, you can get context-sensitive online help on a page by doing one of the following:</p> <ul style="list-style-type: none"><li>• Click the <b>help</b> link in the top right corner of the application window</li><li>• Click the <b>help</b> button in a pane or pop-up, if available</li><li>• Click the <b>help</b> () icon found at the top of an Info Panel.</li></ul>



## Overview

The screenshot shows the InstantSurvey website's client login interface. At the top, there is a navigation bar with links for Home, Products, Sign Up, About Us, and Contact Us. A 'client login' button is highlighted in the top right corner. Below the navigation bar, the page title is 'InstantSurvey Login'. The main content area contains a login form with the InstantSurvey logo, a 'Forgot your password?' link, and a 'Sign up now!' link. The form fields are: Username: 'bsingl @gmi-mr.com', Password: '\*\*\*\*\*', and a checked 'remember password' checkbox. A 'LOGIN' button is located at the bottom right of the form. To the right of the form, there are three promotional boxes: 'free surveys' with a link to 'Send Out a Free Survey Now!', 'sign up' with links for 'InstantSurvey Basic' and 'InstantSurvey Pro', and 'it's as easy as...'. The background of the page features a blue and white grid pattern with a globe and various icons.

### InstantSurvey Overview

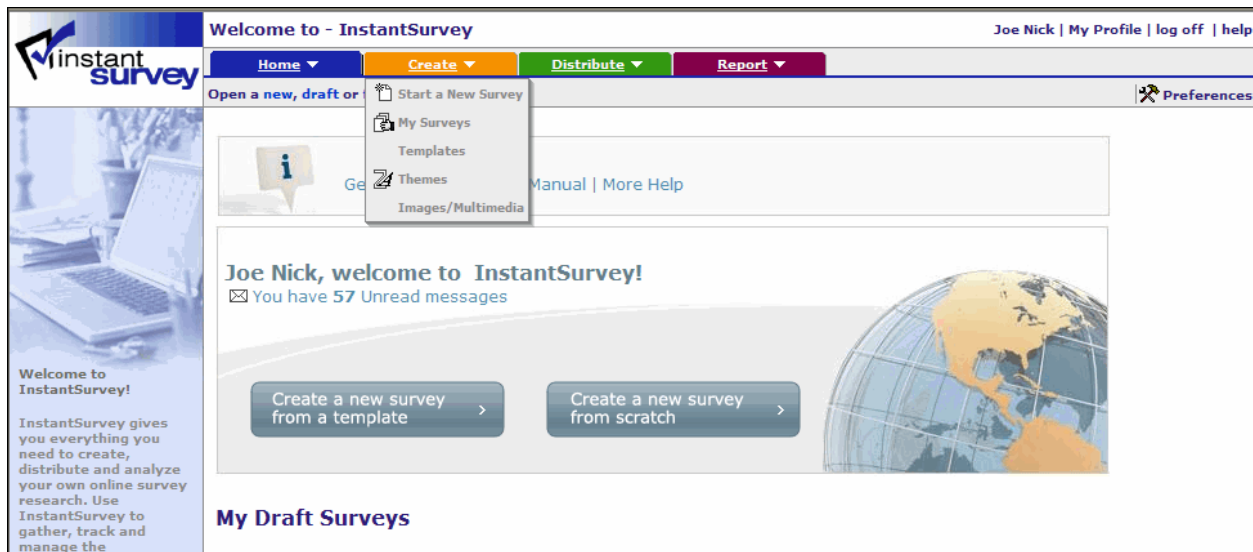
InstantSurvey provides a flexible and easy-to-use Web-based user interface for building, distributing, analyzing and reporting surveys. Features include a streamlined simple mode designed for beginners and a full-featured advanced mode for power users.

**This section includes:**

- [Home page](#)
- [Navigation](#).

### Home Page

Each time you log on to InstantSurvey, the Home page opens and you can begin your session. The *Home* page is where you can find information about your account, read messages, survey creation, distribution, and reports. From the *Home* page, you can begin a new survey or continue with any part of the survey management process.



**Drop-down lists under the main tabs provide access to all InstantSurvey features.**

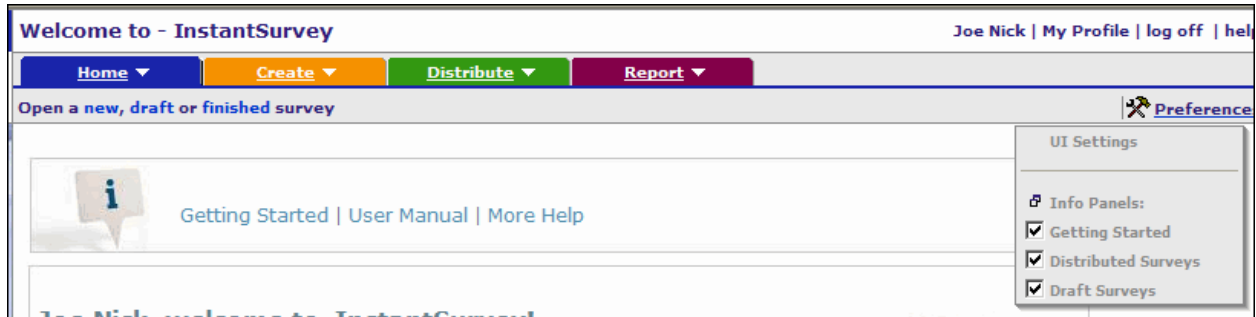
**The sub-topics are:**

- [Customizing the Home page](#)
- [Frequently-used icons](#).

### Customizing the Home Page

Several optional windows, called **Info Panels**, are available to display information relevant to different stages of the survey process. You can show or hide these Info Panels on the *Home* page by checking the check boxes in the **options** drop-down accessed from the **Preferences** icon located on the top-right corner of the application.

## Overview



### The sub-topics are:

- [UI settings](#)
- [Info panels](#).

## UI Settings

The **Preferences** subtab includes the **UI Settings** link, which opens a page where you can customize how the user interface in InstantSurvey will work for you.

A screenshot of the 'Interface options' page for a user named 'JOE NICK'. The page has a header with 'Home', 'Create', 'Distribute', and 'Report' buttons. Below the header is a message: 'Here you can change your interface settings such as encoding.' The main content area is titled 'Interface settings' and is divided into two sections. The first section, 'Language settings', contains three dropdown menus: 'Encoding' (set to 'Auto-Select (windows-1252)'), 'System message format' (set to 'Send HTML when possible'), and 'E-mail encoding for system messages' (set to 'Western European (Windows)'). The second section, 'Interface settings', contains a list of languages for the 'UI language' dropdown: 'English (United States)' (checked), '简体中文', 'Français', 'Deutsch', 'Español', and 'Português (Brasileiro)'. There is a 'reset to default' button for the panels. At the bottom are 'submit', 'cancel', and 'help' buttons.

### To set UI properties

1. When you click **UI Settings** on the **Preferences** or **options** drop-down list, the *Interface Options* page opens allowing you to set your language preference when working with the application. Use the table below to make the proper settings.

**Note:** *Language settings you enter in this page will be remembered during future login sessions until you change them.*

## Overview

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Feature	Description
<b>Language settings</b>	
You can set your language preference by entering the following information in the Interface Settings page.	
Encoding Options	Select the application encoding option. The encoding option should be the same as your browser encoding. If you work with number of different languages, choose Unicode (UTF-8).
System message format	Select whether you prefer system message to be in HTML or plain text only.
E-mail encoding for system message	Select the e-mail encoding option. Ensure that your e-mail program supports the selected e-mail encoding.
Locale	Select your geographic location.
<b>Interface Settings</b>	
UI Language	A check mark displays to the left of the language selected for the user interface. Click a language to select that language for your user interface default. Select your desired language. InstantSurvey is localized for the following languages: English, simplified Chinese, Brazilian Portuguese, French, German and Spanish.
Panels	Allows you to reset to your default settings. The default setting shows all info panels on each page.

2. Click **submit** to make the user interface changes and then click **OK** to confirm the changes.

## Info Panels

Info Panels provide a list of the draft, finished and analyzed surveys that you created, including active distributions of these surveys. When Info Panels are checked in the **preferences** or **options** drop-down list, a listing of the panels opens allowing you to have quick and easy access to information that you created. Check the checkbox next to the info panel you wish to display on the page. De-selecting the checkbox removes the info panel from the page.

### Info Panels available on the *Home* page are:

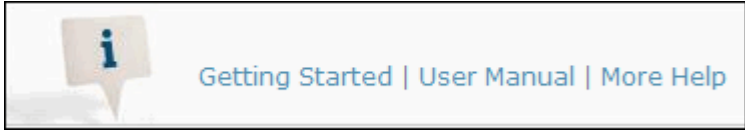
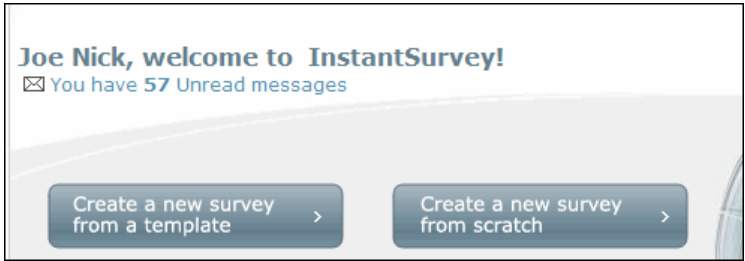
- [Getting started](#)
- [Distributed surveys](#)
- [Draft surveys](#).

## Overview

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### Getting Started

This info panel consists of two panes at the top of the *Home* page.

Option	Description
<b>Information Pane</b>	
Getting Started	This brief tutorial leads you through the process of creating, distributing and viewing results from a very basic survey. It illustrates how easy it is to get started. After you have an overview of the basic process, you can delve deeper into the many advanced capabilities of InstantSurvey.
User Manual	Click to download a PDF of the user manual.
More Help	Click to open the online Help for the <i>Home</i> page. It also has a search feature for finding more information.
<b>Welcome Pane</b>	
Unread Messages	The system sends automated status messages to your account during the system distribution process. Any unread system messages sent to your account appear in the Unread Messages panel. All system messages, read and unread, are in the <i>Message Box</i> page, accessible via the <b>Home</b> tab.  <b>Note:</b> System messages are also sent to your e-mail account.
Create a New Survey From a Template	This function allows you to create a survey, using a past survey that has been saved as a template. Click this and the <i>Templates</i> page opens. See the document on creating your survey for more information.
Create a New Survey From Scratch	This function allows you to create a survey from the beginning. Click this and the <i>Name and Notes</i> page opens. See the document on creating your survey for more information.

#### To see your messages

- Click the link that reads **You have X# Unread messages**. The *Message Box* page opens.

#### To read messages


- Click the subject of a message in the list to read it. Unread messages are in boldface.

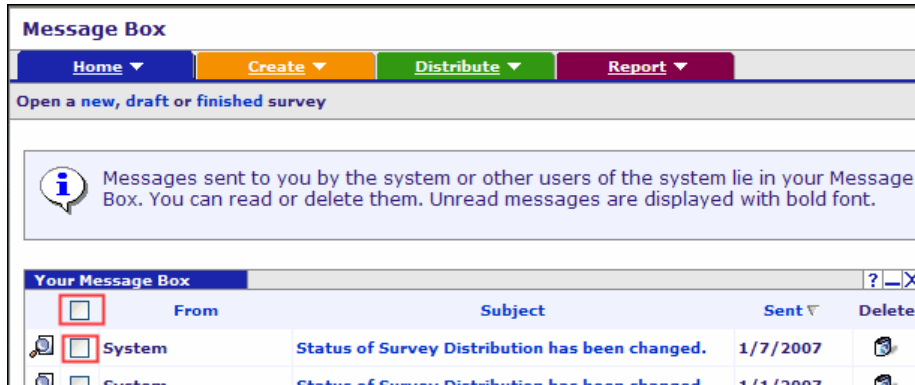
## Overview

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### To delete messages

You can delete messages either individually or in groups. Deleted messages are moved to the message Recycle Bin, which can be emptied later.

- Delete messages individually by clicking the **Delete** () icon next to the message.
- Delete more than one message at a time by selecting the check box to the left of messages to delete, and then clicking **delete** at the bottom of the list.
- Delete all of your messages by selecting the check box at the top of the list and then clicking **delete** at the bottom of the list.



### Distributed Surveys




Distributions that have reached their end date and are in the reporting phase appear in the *My Distributed Surveys* panel.

### Draft Surveys

Surveys that you are in the process of creating appear in the *My Draft Surveys* panel. Click on a survey title to open it in the survey editor.







### Frequently-Used Icons

The table below presents a listing of frequently-used icons in InstantSurvey.

Icons	Function
 Preview	Click this icon to preview a survey, template or theme.
 Info	Click this icon for information about a distribution or distribution template.
 Edit	Click this icon to edit a survey or report or dataset.

## Overview

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Icons	Function
 Rename	Click this icon to rename a survey, template, or theme.
 Distribute	Click this icon to distribute a survey.
 Copy	Create a new survey from a Survey Template or copy a Finished Survey.
 Move to Recycle Bin	Mark an item for deletion by moving it to the Recycle Bin.
 Recycle Bin	Deleted items are stored in the Recycle Bin until it is emptied. These items may be recovered before the Recycle Bin is emptied.
 Delete	Immediately and permanently delete an item.

***These frequently-used icons can be accessed throughout InstantSurvey to activate common tasks.***

## Navigation

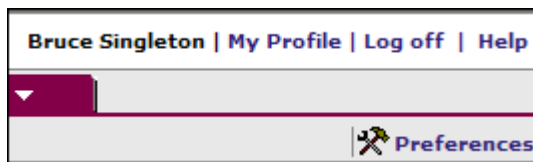
There are different navigation tools in InstantSurvey that enable you to easily access your survey and the different functions available in the system.

**The sub-topics are:**

- [Options on every page](#)
- [Survey context toolbar.](#)

## Options on Every Page

Every InstantSurvey page includes the following user options displayed at the top-right corner of the application.



Option	Description
User Name	Current account name.
My Profile	Click to open the <i>Profile</i> page where the user enters or changes name, e-mail address and company. This is the same as clicking the <b>My Profile</b> option in the <b>Home</b> tab. See the section <a href="#">My Profile</a> for more information.

## Overview

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Option	Description
Log off	Ends your InstantSurvey session.
Help	Provides context-sensitive help for the current page.
Preferences	Provides access to controls for customizing the InstantSurvey user interface (UI) and language settings, including the Info Panels for each page.

### See also:

- [Info Panels](#)
- [Customizing the Home Page.](#)

## Survey Context Toolbar

When a survey is open, a toolbar at the top provides easy access to the creation, distribution and reporting functions for that survey. When you close the survey, the survey context toolbar provides a link to reopen easily your most recent survey.



***The survey context toolbar provides easy access to the creation, distribution, and reporting functions within the same survey.***



## Main Menu

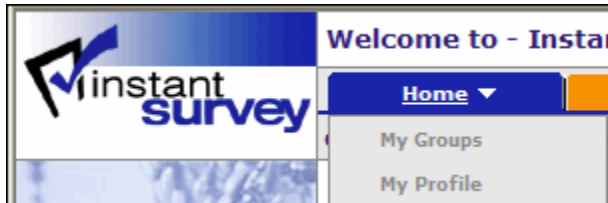
Throughout InstantSurvey, you have access to all functionality from the **Home**, **Create**, **Distribute**, and **Report** tabs.

**This section includes:**

- [Home tab](#)
- [My groups](#)
- [Create tab](#)
- [Distribute tab](#)
- [Report tab](#).

### *Home Tab*

From the **Home** tab, you will be able to access your personal account, create groups for collaborating on surveys, read your system messages and upload your files.



#### [My Groups](#)

Create and manage workgroups for collaborating on surveys, distributions, and reports.

#### [My Profile](#)

Update your user account profile and change your password.

### **My Profile**

From **My Profile** in the **Home** tab, you can update your user profile as well as change your password.

## Overview

Profile page - InstantSurvey Joe Nick | My Profile

Home Create Distribute Report

Open a new, draft or finished survey

### Joe Nick

First Name: Joe \* Language: English (United States) v

Last Name: Nick \* Country: Choose Country v

E-mail: jnick@gmi-mr.com \* Street Address:

Reply Address: jnick@gmi-mr.com City:

Status Message Address:  State:

ZIP:

Company: GMI \* Department:

Job Title:

Phone:

Fax:

Change Password

Ok Cancel Help

All information tracked or stored in InstantSurvey is confidential and not sold or rented to any outside entities as stated in the End User License Agreement.

### The sub-topics are:

- [Update my profile](#)
- [Change password](#).

## Update My Profile

Your user profile contains important information about your account.

### To update your user profile

1. Select **My Profile** from the **Home** tab in the InstantSurvey navigation bar. All fields reflect the information entered when the account was created.
2. To add more user information, enter the information into the appropriate field(s). Three additional fields appear on the *Your Account* form:
  - o *Reply address*: A different address from the user account e-mail address may be specified for replies to e-mail invitations or comments about your surveys.
  - o *Status message address*: A different address from the user account e-mail address may be specified for messages from the system about the status of your survey distributions.
3. Click **submit**. Your user profile is updated and stored in the database.

## Change Password

### To change the password on your account

1. Select **My Profile** from the **Home** tab in the InstantSurvey navigation bar.
2. In the Profile page, click **Change Password**. The *Password Change* pane opens.
3. Enter the current account password in the **Current Password** text box.
4. Enter the new password in the **New Password** text box.
5. Re-enter the new password in the **Confirm New Password** text box.
6. Click **OK**. Your password is changed and stored in the database.

## My Groups

From **My Groups** in the **Home** tab, you get a list of the groups you have created. You can edit or delete your groups as well as create new groups. You can also invite people to join your group. You will also get a list of groups of which you are a member.

**My Groups - InstantSurvey**

Home ▾ Create ▾ Distribute ▾ Report ▾

Open a new, draft or finished survey

---

**My Groups**

Edit Delete Invite CreateGroup

Name	ID	Company	Created	Groups	Users
page: 1 show: 10   20   50   all records					

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**My Membership**

Leave Group

Name	ID	Company	Group Owner	Owner E-mail	Users
Association Surveys	851	GMI	InstantSurvey Team	InstantSurvey@gmi-mr.com	5021
page: 1 show: 10   20   50   all records					

---

**My Users**

Edit Delete Create User

Name	E-mail	ID	Created
Joe Quinto	jquinto@gmi-mr.com	10634	7/24/2007
page: 1 show: 10   20   50   all records			

Pane	Description
My Groups	<p>You can manage the following aspects of the group properties:</p> <ul style="list-style-type: none"> <li>• <a href="#">Creating a group</a></li> <li>• <a href="#">Invite group members</a></li> <li>• <a href="#">Delete a group</a></li> <li>• <a href="#">Edit a group</a></li> </ul>

## Overview

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Pane	Description
My Membership	This allows you to leave a group. Use the radio button to select the group you wish to leave. Click <b>Leave Group</b> .
My Users	This function allows you to add users, whom you can then invite to join groups. For more information on adding and creating users, see <a href="#">Creating an Account</a> .

*When you create a group, you are able to invite users to join your group.*

## Group Collaboration

InstantSurvey allows teams of people to work collaboratively on the creation, management, and analysis of surveys.

InstantSurvey group and permissions features allow you to work in collaboration with other members of your organization to create, manage and analyze surveys, as well as access shared items. The *My Groups* page lists groups you have created, as well as other users' groups you have joined.

Before setting up group collaboration for your organization, you should be familiar with various concepts.

## Group Membership

All InstantSurvey users are granted the permission to create groups by default. Once a group is created, you can invite other InstantSurvey users to join your group.

Inviting other InstantSurvey users to your groups does not give you administrative privileges over those users.

## Sharing Items

Almost everything created in InstantSurvey can be shared with members of a group by setting its permissions. Each item can be shared with only one group at a time. You can give members of a group the ability to read, edit, or delete an item.

### See also:

- *Setting Permission* in the "Reporting" document
- *Permissions* in the "Survey Distribution" document.

## Ownership

By default, you are the owner of everything you create in InstantSurvey. In addition to sharing items with other users, you can change ownership of an item to give it to another user.

## Distribution of Shared Surveys

Any user who has "read" access to a survey can create a new distribution of it. This user is then the owner of the distribution. The owner of the survey only has access to this distribution if the distribution owner shares it back with the group.

### Permissions Needed to View a Report

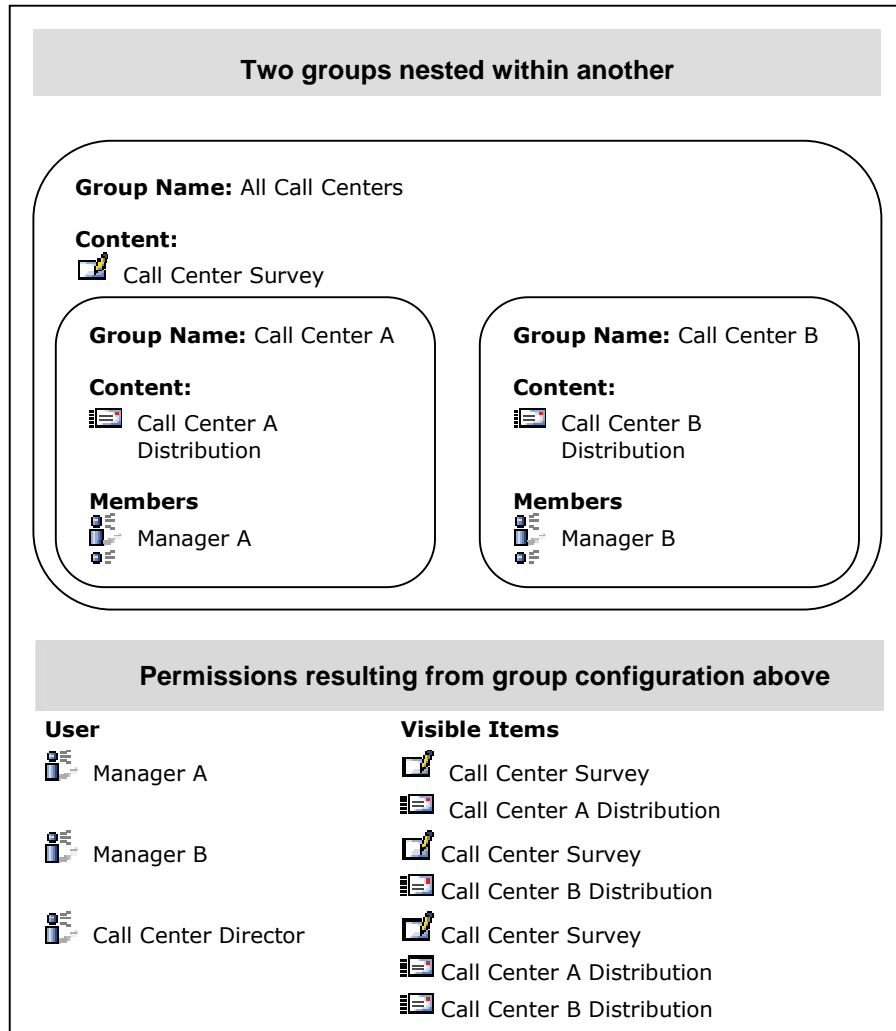
A user needs “read” access to both a survey questionnaire and a distribution in order to view a report.

### Group Hierarchies

Groups can be nested within other groups to create permissions hierarchies. Items shared with a group will be accessible to all members of that group or any of its subgroups.

The diagrams below illustrate an example of a group hierarchy. Subgroups for two call centers are nested inside an overall group. The Call Center Survey is shared with the overall group, but separate distributions to each call center’s customers are shared with separate subgroups.

Managers of the call centers should be invited to their respective subgroups to have permission to both the survey and their specific distributions. However, the Call Center Director should be invited to both subgroups to gain access to the survey and all distributions.



***Example of permissions resulting from two groups nested within another***

**Create a Group**

You can create a group of users to collaborate with you in the survey process. You can also accept an invitation to be a part of a group.

## Overview

The screenshot shows the 'My Groups - InstantSurvey' interface. At the top, there are navigation tabs: Home, Create, Distribute, and Report. Below these is a dropdown menu with 'My Groups' and 'My Profile'. The main section is titled 'My Groups' and contains buttons for Edit, Delete, Invite, and CreateGroup. Below the buttons is a table with columns: Name, ID, Company, Created, Groups, and Users. The table shows one record: Association Surveys, ID 851, Company GMI, InstantSurvey Team, InstantSurvey@gmi-mr.com, and 5021 users. Below the table are pagination controls: page: 1 and show: 10 | 20 | 50 | all records.

Name	ID	Company	Created	Groups	Users
Association Surveys	851	GMI	InstantSurvey Team	InstantSurvey@gmi-mr.com	5021

### To create a group

1. Select **My Groups** from the **Home** tab. The *My Groups* page opens.
2. Click **Create Group**. The *Add Group Name* page opens.
3. Enter the group name and click **next**. The *Add Company Name* page opens. Enter a company name and click **finish**.
4. The new group is created and displayed in the *My Groups* list.

### Invite Group Members

#### To invite existing users to join your group

1. Select **My Groups** from the **Home** tab. The *My Groups* page opens.

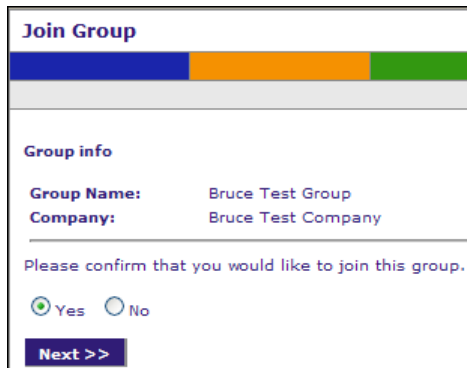
The screenshot shows the 'My Groups - InstantSurvey' interface. At the top, there are navigation tabs: Home, Create, Distribute, and Report. Below these is a dropdown menu with 'My Groups' and 'My Profile'. The main section is titled 'My Groups' and contains buttons for Edit, Delete, Invite, and CreateGroup. Below the buttons is a table with columns: Name, ID, Company, and Cre. The table shows one record: Bruce Test Group, ID 1243, Bruce Test Company, 7/25/2. Below the table are pagination controls: page: 1 and sh.

Name	ID	Company	Cre
Bruce Test Group	1243	Bruce Test Company	7/25/2

## Overview

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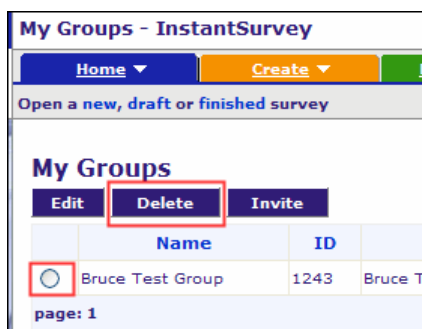
2. Use the radio button to select the group you want to invite people to. Click **Invite**. The *Method of E-mail Import* page opens. Use the radio button to select the method for importing e-mails. The **Provide e-mail addresses separated by returns** appears as the default. Click **next**. The *Import E-mails* page opens.
3. Enter the e-mail addresses of the people to invite. Click **next**. The *E-mail for Existing Users* page opens if any of the invitees are already using Instant Survey. The message that will be sent displays.
4. Click **finish**. The invitees receive an e-mail with a link. When they click the link, the *Join Group* page opens. They use radio buttons to confirm or deny that they wish to join the group. They click **Next**.



- If they select **Yes**, then a confirmation message appears, confirming that they have joined.
- If they select **No**, then they return to the GMI website.

## Delete a Group

Deleting a group allows you to dissolve the group, but does not remove the members from Instant Survey.



### To delete a group

1. Select **My Groups** from the **Home** tab. The *My Groups* page opens. Go to the *My Groups* portion of the page.
2. To delete a group, use the radio button to select the group, and click **Delete**. A warning displays asking you to confirm that you wish to delete the group.



### Edit a Group

Editing a group allows you to make changes about the group membership, the name of the group, permissions, and other features.

The sub-topics are:

- [General tab](#)
- [Users](#)
- [Subgroups](#)
- [Permissions](#).

To edit a group

1. Select **My Groups** from the **Home** tab. The *My Groups* page opens. Go to the *My Groups* portion of the page.
2. Use the radio button to select the group you wish to edit and click **Edit**. The *General Instant Survey* page opens, with four tabs.

### General Tab

- In the **General** tab, edit the group name (required field) and company name. Click **ok**. You return to the *My Groups* page and the changes display.

The screenshot shows the 'Edit Group - General' form within the InstantSurvey application. The form is titled 'General - InstantSurvey' and has a navigation bar with 'Home', 'Create', 'Distribute', and 'Re' tabs. A dropdown menu is open under 'Home', showing 'My Groups' and 'My Profile'. The 'My Groups' option is selected, and the 'Instant Survey' page is visible. The 'Edit Group - General' form has four tabs: 'General', 'Users', 'Subgroups', and 'Permissions'. The 'General' tab is active, showing the following fields and values:

- Group Name: Bruce Test Group \*
- Group ID: 1243
- Company: Bruce Test Company
- Owner: Joe Nick
- Owner E-mail: jnick@gmi-mr.com
- Owner User ID: 5360
- Users: 2

At the bottom of the form are three buttons: 'Ok', 'Cancel', and 'Help'.

### Users

- Click the **Users** tab to see a list of users and the various functions you can perform.

## Overview

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	Name	E-mail
<input type="checkbox"/>	Joe Nick	jnick@gmi-mr.com
<input type="checkbox"/>	Bruce Singleton	bsingleton@gmi-mr...

page: 1

### To remove a User

- Select the user to remove by placing a check next to their name. Click **Remove**.

### To add User

- Click **Add User**. The *My User List* pane opens, with a list of users. These users are users already created under your account. See [Create Account](#) for more information. Place a check next to the name of the user you wish to add and click **Add**.

Name	E-mail	ID	Created
<input type="checkbox"/> Joe Nick	jnick@gmi-mr.com	5360	11/9
<input type="checkbox"/> Joe Quinto	jquinto@gmi-mr.com		

page: 1

### To invite User

This allows you to invite a new user into a group. This can be any InstantSurvey user, not only those under your account (that you created).

- Click this button and the *Method of E-mail Import* page opens. See [Invite Group Members](#) for more information on this process.

## Subgroups

See [Group Hierarchies](#) in **My Groups** for an explanation of subgroups.

### To remove a subgroup

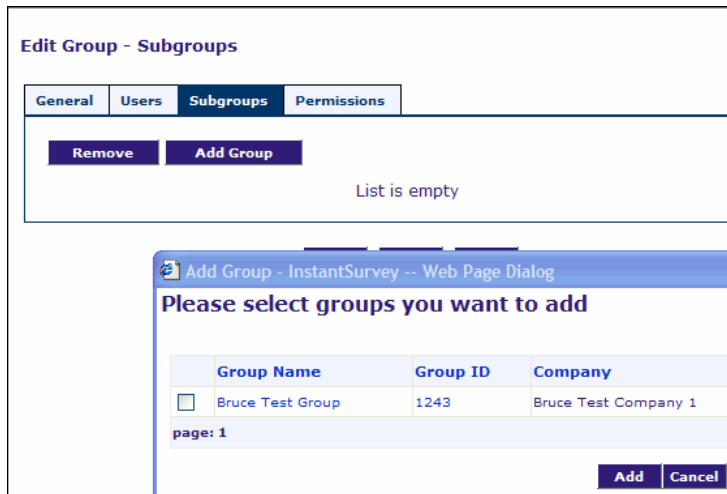
- To remove a subgroup, place a check in the checkbox next to the group you wish to remove. Click **Remove**.

## Overview

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### To add a subgroup

- Click to add a subgroup to the list. The *Add Group* pane opens. Place a check next to the group you wish to add and click **Add**.



### Permissions

This allows you to set and change permissions for the group.

- Click this tab and the *Permissions* page opens. For more information about permissions, see [Creating an Account](#).

### Accept a Group Invitation

#### To accept membership in a group

- If you are invited as a member of a group, you will see an invitation message in the *Your Message Box* pane on the *Message Box* page.
- Click this message, and then click the link included in the message. A confirmation page displays.
- Click **Yes** to accept the invitation.

#### See also:

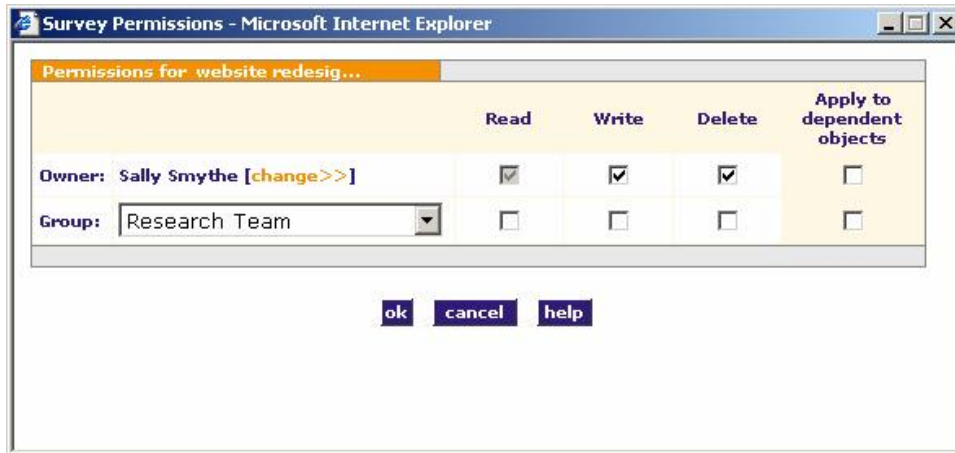
- [Unread Messages](#).

### Share Items with Groups

This function allows you to share information about surveys and other functions. Almost everything created in InstantSurvey can be shared with members of a group by setting its permissions.

## Overview

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### To share an item with members of your group

1. Under the **Distribute** tab, click **Distribute a Survey**. The *Distributions* page opens.
2. Use the radio buttons to select the survey you wish to share. In the **More actions** drop-down list, select **Permissions**. This opens the *Permissions* dialog box.
3. Choose the group to share the survey with from the **Groups** drop-down list.
4. Select the check boxes on the right that correspond to the permissions you want to grant to the group (read, write, or delete). In the case of surveys, you can also choose to apply the permissions to all distributions of the survey.
5. Click **ok** to apply these permissions.

**Note:** You can share a draft survey as well by performing the same functions from the My Surveys page.

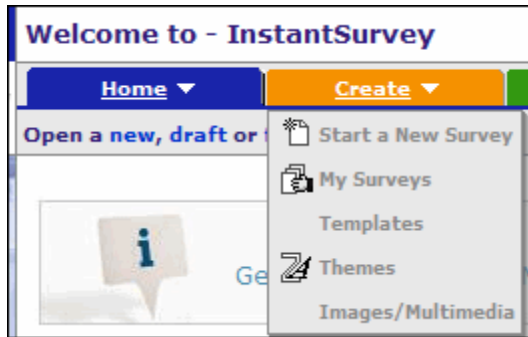
### Create Tab

From the **Create** tab, you can create new surveys from scratch or based on pre-built templates. You can also store works in progress, edit shared surveys, and manage your library of reusable components.

The creation window provides quick access to your most recent Surveys, Templates, Themes and Images.

## Overview

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### Start a New Survey

Creates a new blank survey.

### My Surveys

Your work area of surveys you are in the process of building.

### Templates

Reusable survey building blocks ranging from individual responses to entire pre-built surveys that you can copy and customize to suit your needs.

### Themes

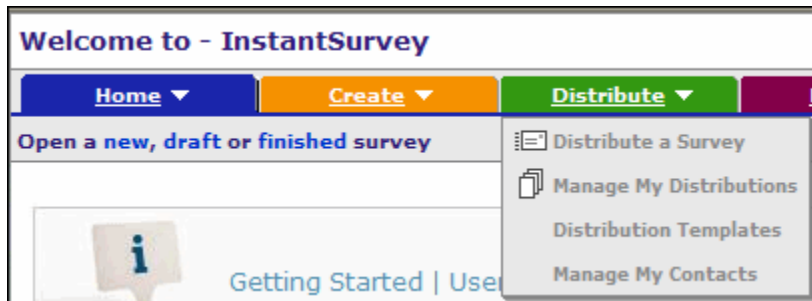
Predefined and unified sets of design elements and color schemes for surveys.

### Images/Multimedia

Includes multimedia files that you can apply to your surveys.

## *Distribute Tab*

After you finish creating a survey, the distribution process can begin. InstantSurvey can send out e-mail invitations for you or generate a survey URL that you can distribute yourself.



### Distribute a Survey

Surveys you have marked as Finished are available for distribution. See page 63 for more information.

### Manage My Distributions

When a distribution is active, you can monitor the responses collected so far, or change various aspects of the distribution.

### Distribution Templates

Saved distribution settings that can help you save time.

### Manage My Contacts

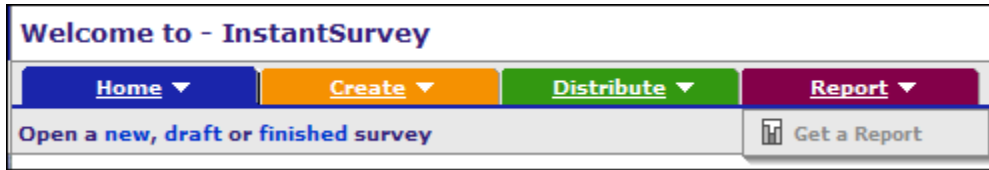
Lists of respondents you survey on an ongoing basis.

## *Report Tab*

The **Report** tab allows you to access and manage your reports as well as to manage the datasets that you have defined for your survey.

## Overview

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### Get a Report

Quick access to all reports that you have created for your survey.

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