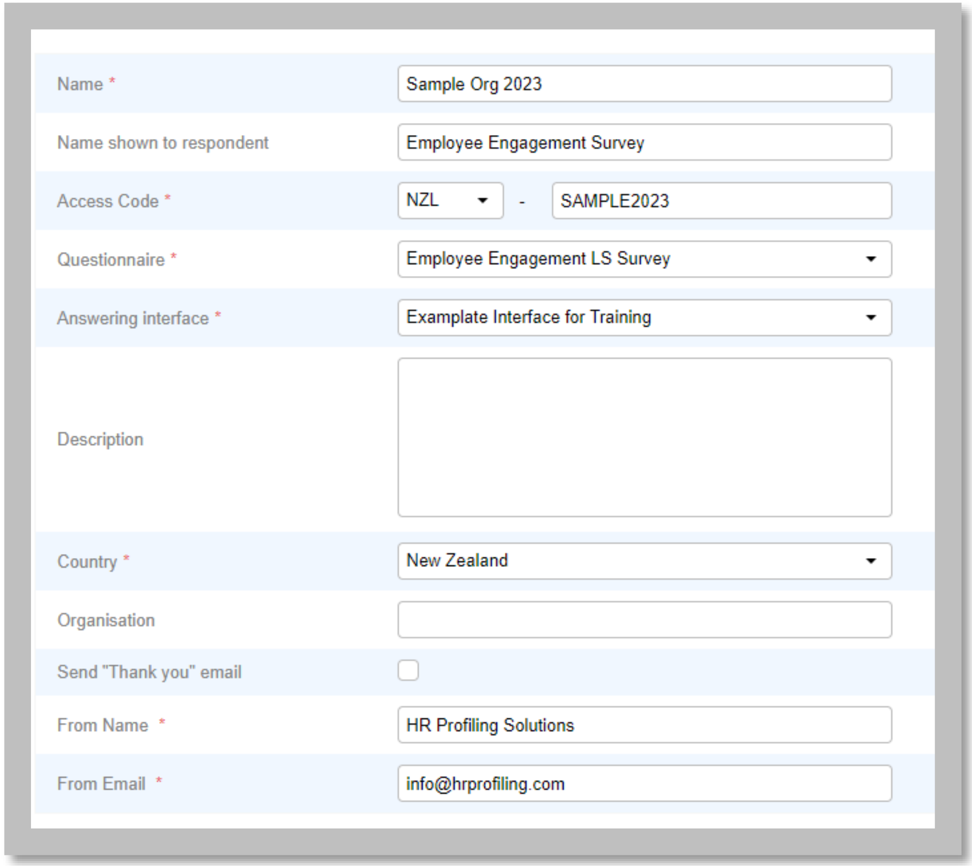
# Surveys I Creating a Survey Project

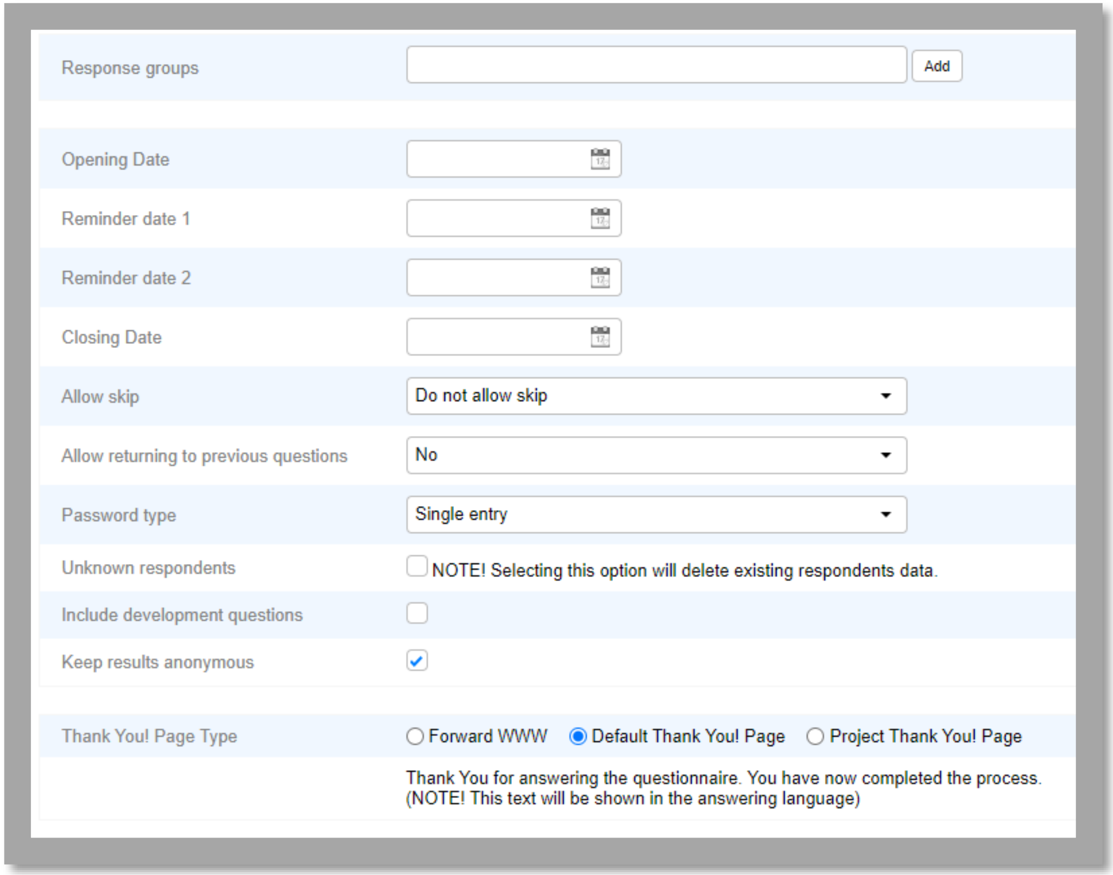
VERSION 2 | Date 23/02/2024

- **Before you can use your survey questionnaire, you will have to create a project.**
- Log into your FinxS account and hover over the **"Projects" tab on your dashboard.** Select "Surveys".
- Click on the + button at the bottom left of the screen **to create a new project**.
- Give the **project a name** e.g. Survey for Sample Org 20—
- Name shown to respondent: Enter a name that will appear at the top of the questionnaire when the participants complete the questionnaire.
- **Give your project an access code**, e.g., AUS-HRP36014.
- **Select the questionnaire** from the dropdown box "Questionnaire". If you cannot see it, it means it's locked. Go to "Templates" "Open Questionnaires", select the relevant one and "edit" it to unlock it (i.e., remove the tick beside 'Locked').
- **Select an Answering Interface**. If you don't have an answering interface, use the default one or contact HR Profiling Solutions for instructions on creating your own.
- **Provide a "Description"** if you wish. This is a good place to provide more details about the Survey for easy referencing.



| | |
|---|---|
| Name * | Sample Org 2023 |
| Name shown to respondent | Employee Engagement Survey |
| Access Code * | NZL - SAMPLE2023 |
| Questionnaire * | Employee Engagement LS Survey |
| Answering interface * | Examplate Interface for Training |
| Description | |
| Country * | New Zealand |
| Organisation | |
| Send "Thank you" email | |
| From Name * | HR Profiling Solutions |
| From Email * | info@hrprofiling.com |

- **Leave "Country"** as is unless the wrong country is showing. Enter in **a "Global Organisation"** (optional). This is usually a company name.
- **To send "Thank you" emails** to participants, tick the box. The system will send a thank you email to the email addresses provided. You can edit the wording of the "Thank you" email and instructions to do this are below.
- **Provide a "From name"**. This is the name that will be displayed on system emails to the respondents (invite and/or reminder).
- **Provide a "From email"**. This is the email address used by the system if a respondent replies to a system generated email (invite and/or reminder).




- **Leave "Response groups" empty if you are going to import the participants** from an Excel Spreadsheet. (Click HERE for instructions on using the Assessors/Respondents Information Spreadsheet). This information will be updated once the spreadsheet is uploaded.
    - If you are going to manually add assessors, enter a response group name e.g. Board Members, Food & Beverage, Customer Care etc., then click "Add". Repeat this until you have created all the groups you require. Nb: It is recommended you use the Participant Information Spreadsheet function – it saves a lot of time.
- **Select an "Opening date"** for the Survey project to start.
    - If you want it to be available immediately, it is recommended you select the day before the current date (using the calendar icon). This ensures the access code is active and available for use now.
- "**Global Reminders**": Select a date and FinxS will send a reminder automatically to the assessors who have not yet answered the questionnaire.
- **Select a "Global Closing Date"** for the Survey access code by clicking on the calendar icon next to "Global closing date".
    - You do not have to select a closing date, however it is recommended, as this date will be given to the assessors in their invitation.
- **"Allow skip"** lets you choose if you want assessors to be able to skip questions within the questionnaire.
    - If you select "Do not allow skip" then assessors will have to answer every question unless, when you set up the questionnaire, you selected "Allow skip" for certain questions. If so, those questions will be able to be skipped. This includes Open ended questions.

- **Select password type**:
    - **Multiple entry**: To have all respondents use the same password, tick ‘multiple entry’.
    - **Single entry:** To have different passwords for each respondent, select ‘single entry’. Passwords can be allocated in the participants’ spreadsheet. However, if you leave the password column blank, the system will automatically create them.
- In the next field, select from the dropdown box whether you want **“Show individual responses” or “Keep results anonymous”.** Remember, if you have advised assessors that their responses will be anonymous, you **must** select “Keep results anonymous”.
- **Select the type of “Thank you” page** you would like to be sent out to respondents/assessors.
    - “Forward WWW” will forward assessors to a website or landing page once they have clicked on “Submit” at the end of the questionnaire.
    - “Default Thank You! Page” will use the template already created in the system.
    - “Project Thank You! Page” allows editing of the wording to be more personalised to your requirements.
- **Click “Save” and the access code/project** will be created. If the system advises there’s an error, it will let you know where that error is. Correct the error and “Save”.