

## Vision Version 3.0

### User Guide

<b>Document Name</b>	Vision User Guide
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## Introduction

Vision is an online training and survey tool.

This document will refer to Training tools and Survey Tools as surveys for the sake of simplicity.

- Vision enables you to create and personalise your own online survey questions.
- Surveys can be branded with your Logo.
- You can view individual or consolidated responses in a real time, online environment, via our responses tools.
- See responses in graphical format
- Export data for more complex statistical analysis.

Vision can be accessed through visiting

<http://vision.e-rm.org/>

## Getting Started

### Registration

If an account has not been created for the user by pre arrangement with eVolve then a registration form will need to be completed.

1. Click the new user link on the homepage.



2. Enter your email address
3. Enter your company name
4. Chose and enter a password, confirming it on the line below.
5. Click on "Register For Vision"

<b>E-Mail Address:</b>	<b>2</b>	<input type="text"/>
<b>Verify E-Mail Address:</b>		<input type="text"/>
<b>Your Name / Company Name:</b>	<b>3</b>	<input type="text"/>
<b>Password:</b>	<b>4</b>	<input type="text"/>
<b>Verify Password:</b>		<input type="text"/>

**5** —

You will then receive a conformation of your registration, and you logon details by e-mail.

## Logging On

You will receive an e-mail in this format:-

Thank you for registering for Vision from Evolve.

To activate your Vision account and begin using Vision you must click or visit the URL below:

<http://vision.e-rm.org/activate.asp?ID=81&Username=GT>

Your Username is:PQR

Your Password is:XYZ

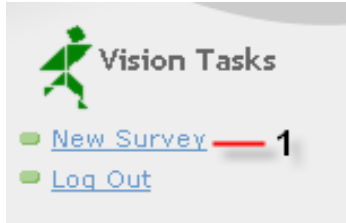
Please ensure that you click on the link in the e-mail to login to vision.

This is a security measure that identifies you at your email address.

## Starting a Survey

When you have logged in you will find yourself in the **Admin Suite**.

1. Click the New Survey link on the right hand side



### Survey Name

This is so you can find your survey easily in the **Admin Suite**.

1. Type your survey name in the box below e.g.

Survey Name:

### Tag Name

This allows a 'friendly' URL to be used, so for example, the URL, as seen by the online users, will be <http://vision.e-rm.org/survey/evolve/mysurvey> rather than a long series of numbers.

Tag Name:

URL: <http://vision.e-rm.org/survey/evolve/mysurvey>

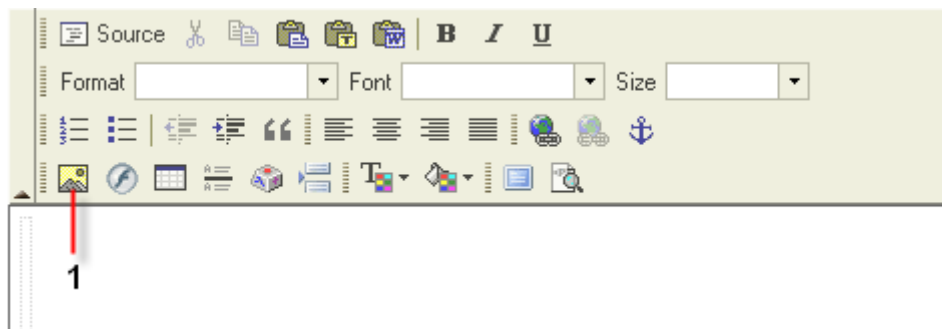
## Survey Headers

This is the “Welcome to my Survey” page.

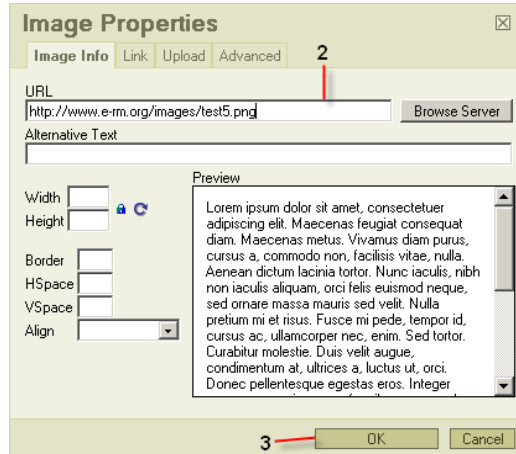
You can add your own Logo, and insert free flow text here, which typically should include the purpose of the survey and how long it will take to complete.

### Adding your Logo, or other images, from the Web

1. Click on the “picture symbol”



2. A new window will pop up. Go to your chosen image on the Internet, right click on the image, go to properties, go to address URL, highlight it, copy the URL (Ctrl C) go to the URL field “2” below and paste the URL (Ctrl V)

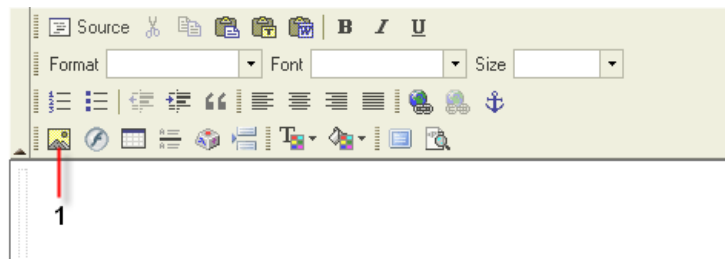


3. Click “ok” – the window will close by its self
4. Your image will be displayed in the top left corner

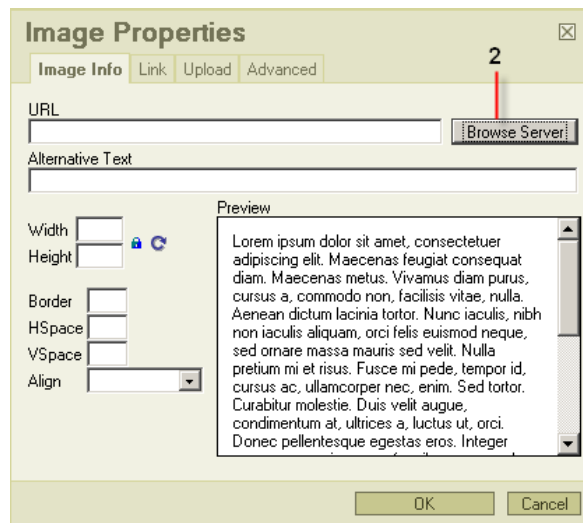


## Adding images from your hard disk

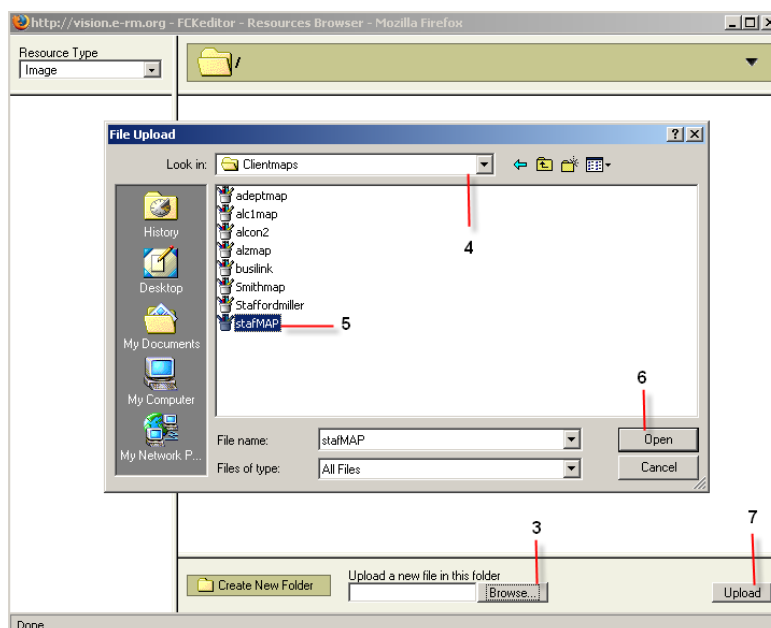
1. Click on the “picture symbol”



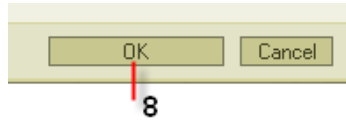
2. Click “Browse Server”



3. A new page will pop up. Click “Browse”
4. Select you folder you want
5. Select the image you want



6. Click "Open"
7. Click "Upload"
8. Your image should have been located on the server. Click "ok" and you image will be uploaded.



## Saving

To save your progress so far or through out you build;

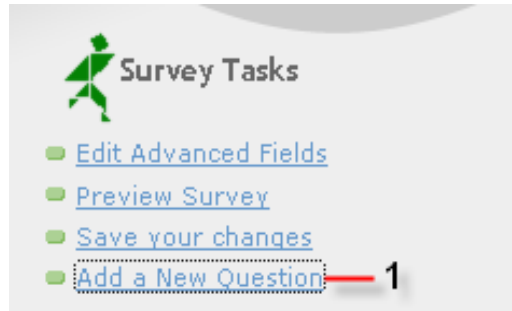
1. Click Save Changes button found on the upper left hand side of the page. The page will auto re-refresh.



## Adding Questions

### How to Add a Question

1. Click add new question found on the right side of the screen, under the header "Survey Tasks"



2. This will open a new window called "Questions- add/ edit"
3. Type in your Question label. This will normally be "1" for question 1 etc, and is used to identify the question in the reporting suite

 A screenshot of a web form titled "Question Options". At the top left, there is a grey button with a green checkmark and the text "save changes". Below the title, there are three rows of form elements:
 

- "Question Label and Type": A text input field containing "1 - Name" (with a red arrow labeled "3" pointing to it), a dropdown menu showing "Textbox" (with a red arrow labeled "2" pointing to it), and a grey button with a green arrow and the text "Update Question Type".
- "Mandatory Question": A checkbox that is currently unchecked.
- "Conditional Question": A checkbox that is currently unchecked, followed by the text "This question is hidden unless certain criteria apply. [\[Click here to add / edit conditional criteria\]](#)".

### Mandatory Questions

This is a question that must be answered for the survey to be completed. If you want the question to be mandatory;

1. Select the check box next to the description.

 A close-up screenshot of the "Mandatory Question" section of the form. It shows the text "Mandatory Question" followed by an unchecked checkbox. A red arrow points to the checkbox with the number "1" next to it.

### Conditional Questions

Conditional Questions have a primary question followed by secondary questions, where the secondary questions are conditional upon the response given in the primary question.

If you are not familiar with these types of questions please see the examples below in "Constructing a Conditional Question"

## Response Formats

There are a number of ways in which you can specify the format of the responses to your questions. Your choice will depend upon the type of response you require.

### Text Box

A box where users can enter text values e.g. their name and address

### Radio Button

This is an option based question type. There will be a unique (Only one) response

### Check Box

This is an option based question type. This question type allows for multiple responses to one question.

### Text Area

This allows the response to comprise a short explanation of up to 500 words, and can be used to identify opinions or understanding of an issue..

## Choosing your required number of potential answers and defining their layout in your survey, using Radio Buttons and Check Boxes

1. Select Radio Button or Check Box
2. Update question type
3. Input number of options
4. Enter the number of options per row, this is how many options you would like before Vision creates a new row
5. Save changes

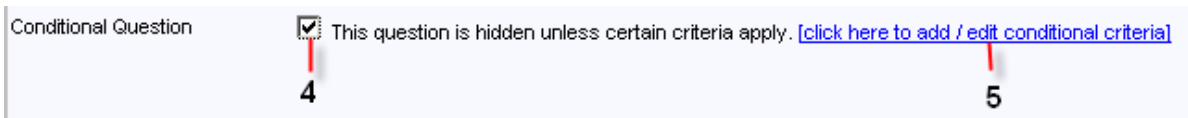
The screenshot shows the 'Question Options' configuration panel. At the top left is a 'save changes' button with a green checkmark icon, labeled with a red '5'. Below this is the 'Question Options' section. The first row contains 'Question Label and Type' with a text input field containing '1 - Name', a dropdown menu currently set to 'Radio Button' (labeled with a red '1'), and an 'Update Question Type' button (labeled with a red '2'). The second row contains 'Mandatory Question' with an unchecked checkbox. The third row contains 'Number of Options' with an empty text input field (labeled with a red '3') and 'Options per Row' with another empty text input field (labeled with a red '4'). The fourth row contains 'Conditional Question' with an unchecked checkbox and a link: 'This question is hidden unless certain criteria apply. [\[click here to add / edit conditional criteria\]](#)'.

## Constructing a Conditional Question

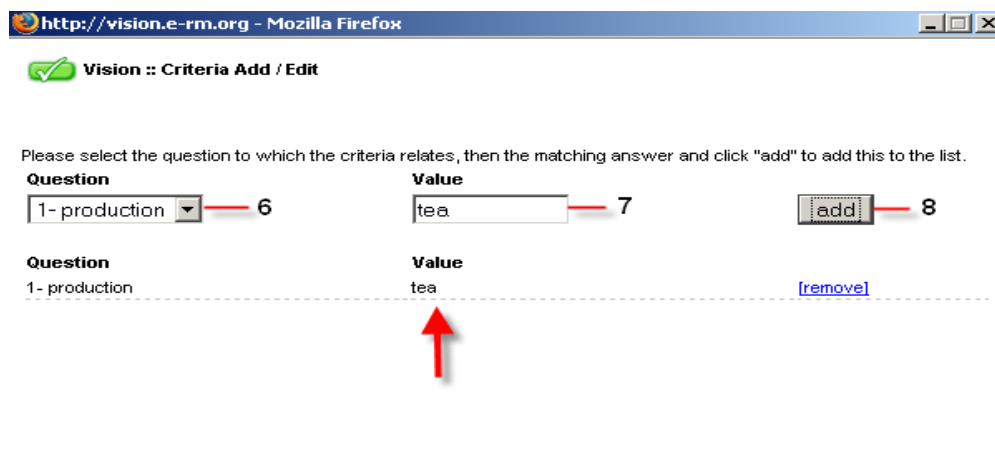
Conditional Questions have a primary question followed by secondary questions, where the secondary questions are conditional upon the response given in the primary question.

To construct such a question:-

1. Write your primary question as you would for any normal question
2. For each potential response to the primary question, you will need to write a secondary question.
3. Write the secondary question
4. Select Conditional Question

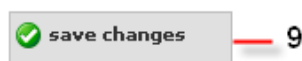


5. Click on add/edit conditional question
6. Select Question
7. Select the value (the answer to the question when selected brings up the conditional question) – Currently the values is Case Sensitive.
8. Click add (will re fresh add question page)



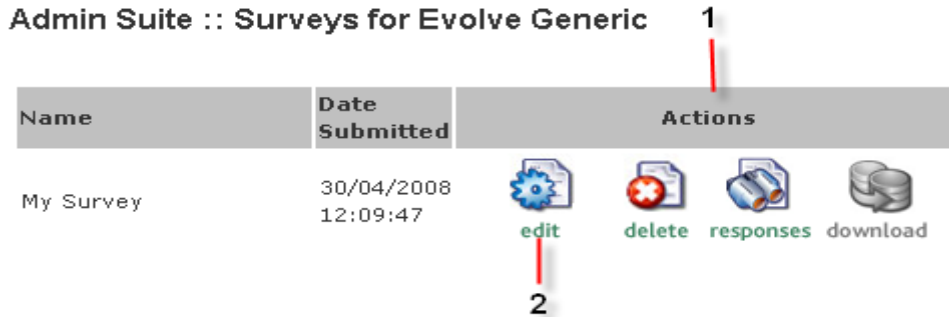
Your selection will show on the bottom of the page.

9. Save changes on add question page

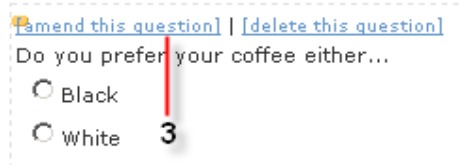


## Editing Your Questions

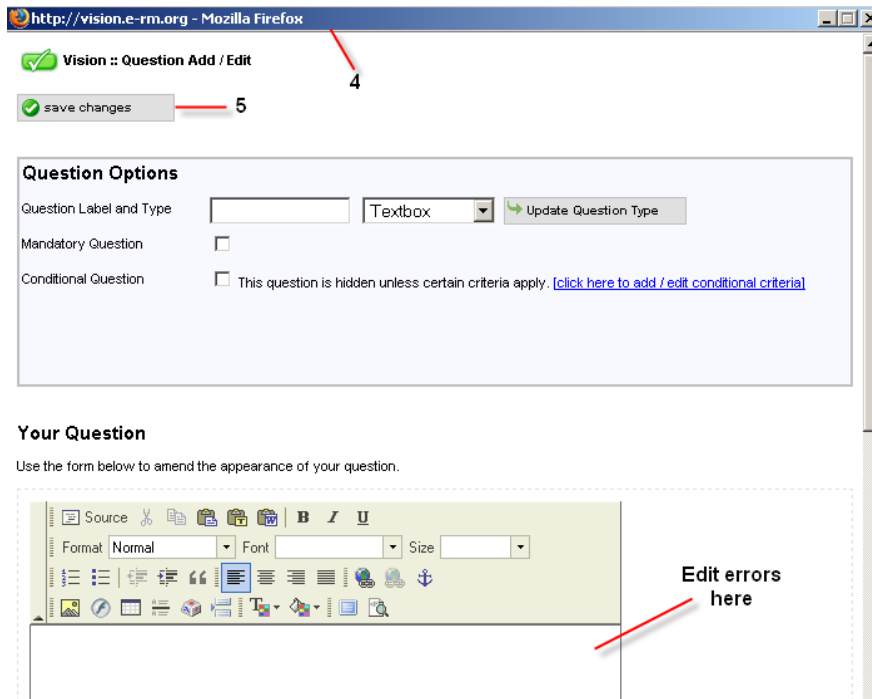
1. Go to Admin Suite – create / edit survey page
2. Select the edit icon



3. Scroll the page down and find the question you want to edit. Click on “amend this question”



4. A new window will open call “Question – add/ edit” you will now be able to make changes.
5. Select “save changes” to keep your progress up to date.



## Changing the Order of Question

1. Simple got to the Admin Suite – create / edit survey page. Scroll down the page and drag and drop the order you wan your questions to fit.

### Survey Questions

[\[add new question\]](#)

[\[amend this question\]](#)

Name

[\[amend this question\]](#)

How old are you?

18 - 21

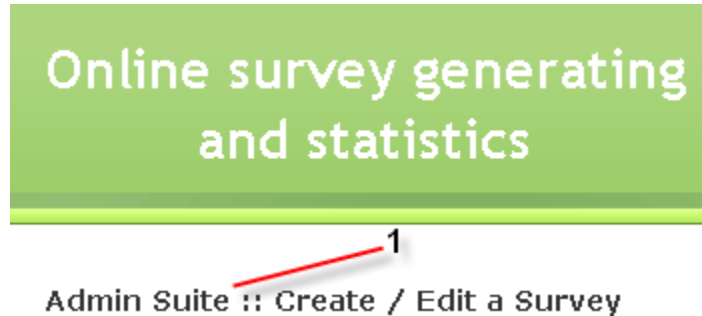
21 - 30

30+



## Deleting a Question

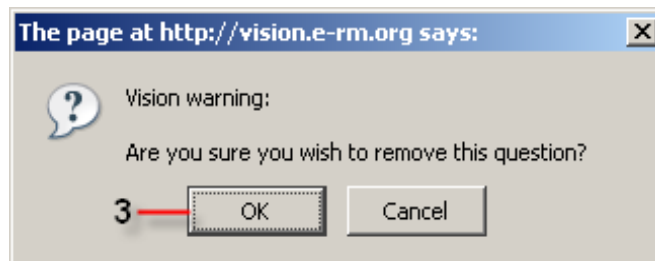
1. Go to Admin suite – create / edit questions



2. Find the question you want to delete and click “delete this question”



3. Click ok on pop up window







4. The page will re-refresh and the question removed

This will permanently remove the question from the database.

## Deleting a Survey

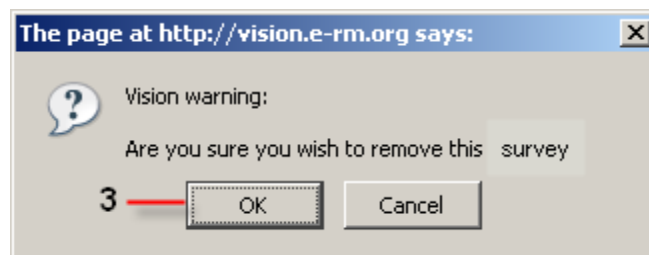
1. Go to Admin suite
2. Click on the delete icon

### Admin Suite :: Surveys for Evolve Generic

Name	Date Submitted	Actions
My Survey	30/04/2008 12:09:47	 edit  delete  responses  download

1 points to the Actions column header.  
2 points to the delete icon.

3. Select ok on the pop-up window

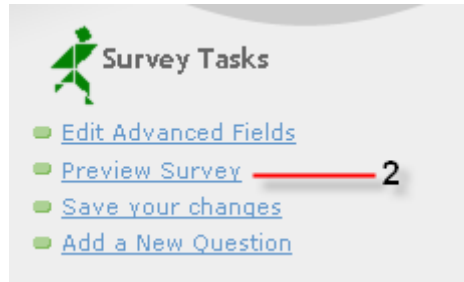


The Admin suite page will re-refresh and the survey will be removed.

This will permanently remove the question from the database.

## Previewing Your Survey

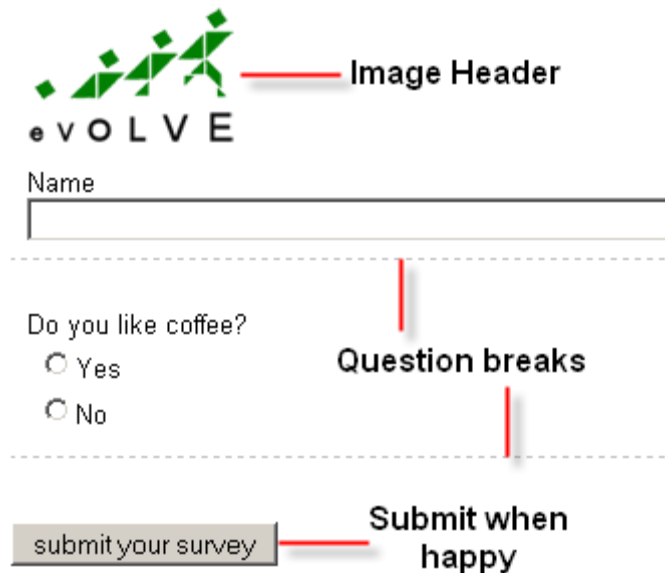
1. Go to admin suite – create / edit a survey
2. Click preview survey on the right hand side of the page under the header “Survey Tasks”



This will bring up a new window showing you a preview of your finished survey.

## What your survey will look like

This is a very basic example of what your survey could look like.



## Submitting your survey

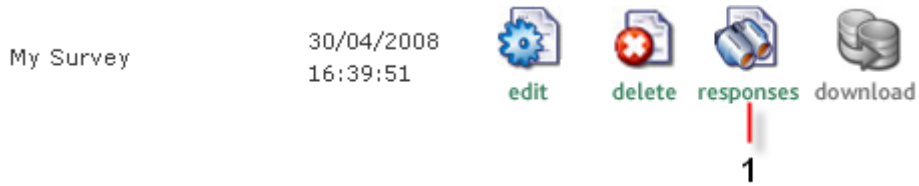
When you are happy with the way it look you can now submit your survey. **You will not be able to make any changes to your survey after submitting.**

## Response Tools

### Viewing responses

This tool will enable you to view all the responses of all the users for a particular survey. You will have the chance to use detailed graphs provided by VISION v3.0 to view trends in option based questions.

1. Click on "Responses"



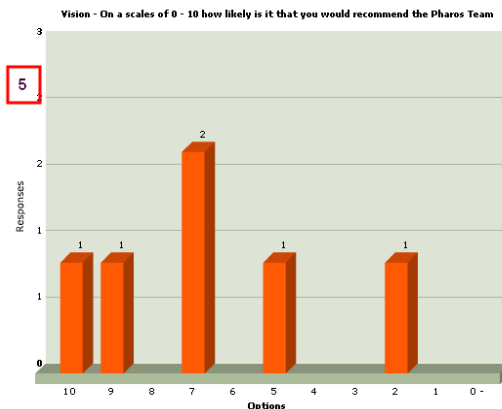
2. Click on "Response Statistics"



3. Select the question you want to view on the drop down
4. Click "go"







5. A graph will now be displayed underneath showing the selected results.



## Downloading responses

This tool will enable you to download all of the user responses that have been collected from a specific survey. The download tool places all the records into a comma-separated file (.csv) that can be opened in MS Excel / SPSS for further analysis (or any other .csv compatible program). If there have been no responses for the survey this option will be disabled and if your survey contains a large number of responses the time taken to download responses may be longer.

1. Select the “download” icon

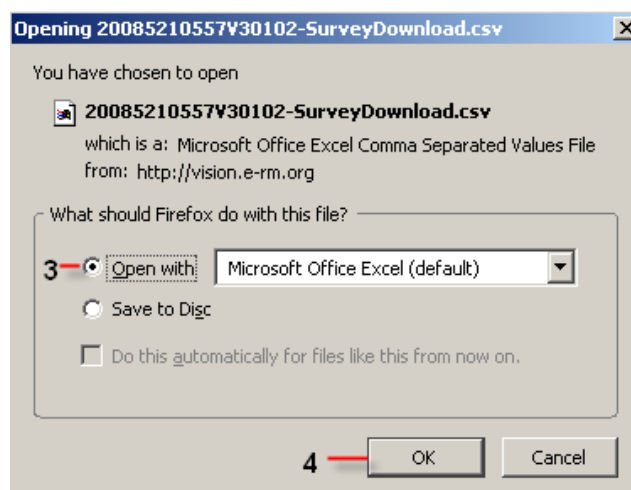
Name	Date Submitted	Actions			
My Survey	24/04/2008 11:27:05	 edit	 delete	 responses	 download 1

2. The page will re-refresh. Then click the link highlighted.

Your file can be downloaded by clicking the link below:

[20085211155V30102-SurveyDownload.csv](#) — 2

3. A new window will pop-up. If you wish to open the file the select open with and what application you want to open it with.
4. Click “ok”, and the file will open in the selected application.

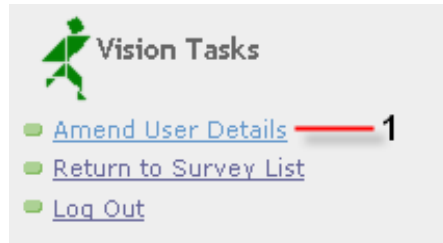


To save, just click the “save to disc” radio button and “ok”.

## General Information

### Changing your password and email address

1. Go to Admin suite – create / edit a survey. Click on the “Amend User Details”, under the header “Vision Tasks”



2. Input you new e-mail address password, confirming it on the line below.
3. Input your new password, confirming it on the line below.
4. Click the “Amend Details” button on the bottom of the page

#### Vision :: Change User Details

2

Username: evolve

E-Mail Address:

Password:

Verify Password:

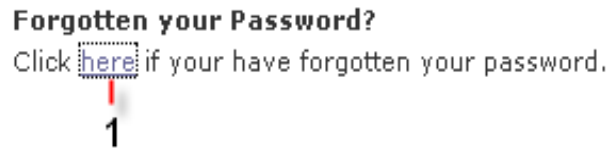
3

Amend Details 4

## Forgotten your password?

If you have forgotten your password it is very easy to get a reminder of what it is via e-mail.

1. On the login page click the link under the header “forgotten your password?”



2. Type in your e-mail address and click “reset password”



You will be sent a new password via e-mail. You may go into “amend user details” and change this password at any point.

## Need Extra Help?

If you are experiencing technical difficulties or require help beyond that in this manual then please contact our support team:

Email: [it@e-rm.org](mailto:it@e-rm.org)

Please use the online help before contacting our support team. Most troubleshooting issues are detailed and explained online.

Support issues are usually dealt with within 48 hours. Support operates from 09:00:00AM GMT to 17:30:00PM GMT Monday to Friday.

