

# eSurvey

Developed by Theo Heselmans, Xceed, Belgium for Ernst & Young

theo@xceed.be  
www.xceed.be -- blog.xceed.be

## Task

Develop an easy to use, flexible tool to create, edit and deploy (multilingual) electronic surveys.  
Allow the end user to easily complete these surveys,  
and finally be able to do intermediate and final customized analysis of the entries.

## Some background information

This application has been developed for Ernst & Young (and remains their property).

It's a Notes and Domino application, initially (2005) build for version 6.5, currently running in 8.0.1.

The scope has increased over the years. Initially targeted at the Belgian audience (1200), shortly afterwards expanded to a big part of Europe (12.000 users), and for 2009 we aim to address 50.000 eSurvey users.

The entire user interface is web-based. There is a Notes interface too, but this is primarily a maintenance and web content manager for administrators.

All technical support information (web pages, CSS, JavaScript, lists, parameters, images) is editable from the Notes interface, without designer rights/needs.

The total development time was less than 15 working days.

## Overview of the functionality from the eSurvey editor point of view

- As many surveys as the user wants
- Ability to define the security (for survey and submitted entries), banner, style, ...
- Each survey can have multiple pages (up to 25), and each page can have up to 30 questions
- A survey can be deployed in multiple languages at the same time, while still able to do a consolidated analysis across all entries
- Both jump and skip logic can be applied to each chapter/page, based on answers from the user
- A question can be one of the following types: simple input, comments, radio button, checkbox, drop-down, matrix, informational.
- A question does not need to be created from scratch, but can be 'imported' from previous eSurveys, or from a library of often used questions
- Each question type has multiple options such as: layout, 'other'-handling, obligatory or not, extra info.
- Questions can optionally contain html (e.g. for inclusion of images, links, ...)
- Questions, chapters and the complete survey can be previewed/tested at any time
- Submitted entries can be tracked and previewed
- Export of submitted entries in both Excel and XML format
- Report definitions can be created to make ad hoc (and final) analysis of the data, displayed as a (cross) table, graph and/or text entry (for comments)
- This consolidated report can be exported as 1 file, in order to be distributed to the sponsors of the survey
- Distribution of the eSurvey via URL or Formula language (both are supplied for copy/pasting in emails)
- A complete Group editing and Audience tracking capability is added recently
- Notification can be created with placeholders, to send flexible and personalized emails
- Built-in context sensitive help

## Overview of the functionality from the end user (the person entering surveys) point of view

- Nice interface
- As long as the survey is not closed, the user can re-enter his/her survey, to complete
- Transparent navigation
- In-line help per questions
- Personalized notification

Screenshots (on the following pages)

The screenshot shows the 'eSurvey Topics and Groups' page in the eSurvey Administration system. At the top left is the Ernst & Young logo with the tagline 'Quality In Everything We Do'. At the top right is the 'eSurvey Administration' header. Below the header is a navigation bar with 'eSurvey Topics' and 'eSurvey Groups' tabs. The 'eSurvey Topics' tab is active, showing a list of survey topics in a scrollable area: 'Alumni Survey', 'Blackberry Survey Executives', 'CWEA ICT Survey', 'Demo for TeamStudio', 'External seminars Accounting 2007 (Closed)', 'RCP Account Acceleration Workshop (Closed)', and '[Reusable Question Library]'. To the right of the list are several buttons: 'Edit', 'Add', 'View Entries', 'Report', 'Preview', and 'Preview with Login'.

The main WebAdmin opening screen, where new eSurveys can be created, existing ones edited, previewed and analyzed.

The screenshot shows the configuration page for a survey titled 'Demo for TeamStudio'. The breadcrumb trail is '> eSurveys/Groups Demo for TeamStudio' and there is a 'Save' button in the top right. Below the breadcrumb is a navigation bar with tabs: 'Definition & Design', 'Chapters', 'Security & Groups', and 'Links for the End-User'. The 'Definition & Design' tab is active. The 'eSurvey Topic' section contains the following fields: 'Topic Code' with the value 'Test', 'Title' with the value 'Demo for TeamStudio', and 'Status' with a dropdown menu set to 'Ongoing'. The 'eSurvey Design' section contains: 'Header banner' with an empty text box and a 'Browse...' button, with a note below it: 'Leave empty for default banner (see top of this page)'; 'Theme' with a dropdown menu set to '-Default EY VI 2008'; and 'Navigation Theme' with a dropdown menu set to '-Default EY VI 2008'.

The initial setup for a survey: name, optional banner, theme.

# Demo for TeamStudio

> eSurveys/Groups Demo for TeamStudio

Save

Definition & Design Chapters Security & Groups Links for the End-User

Chapters English

A. General Info  
B. Thank you

- Edit
- Add
- Duplicate
- Delete
- ▲
- ▼
- Preview

Multilingual creation of chapters/pages

# Demo for TeamStudio

> eSurveys/Groups > Demo for TeamStudio A. General Info

Save

## Survey Chapter

Topic	Test
Language	English
Code for Chapter	A
Chaptertitle	<input type="text" value="General Info"/>
No Navigation	<input type="checkbox"/> Don't display navigation

## Skip Logic\*

If in Chapter

*\* complete only, after all questions have been entered*

## Jump Logic\*

if Question

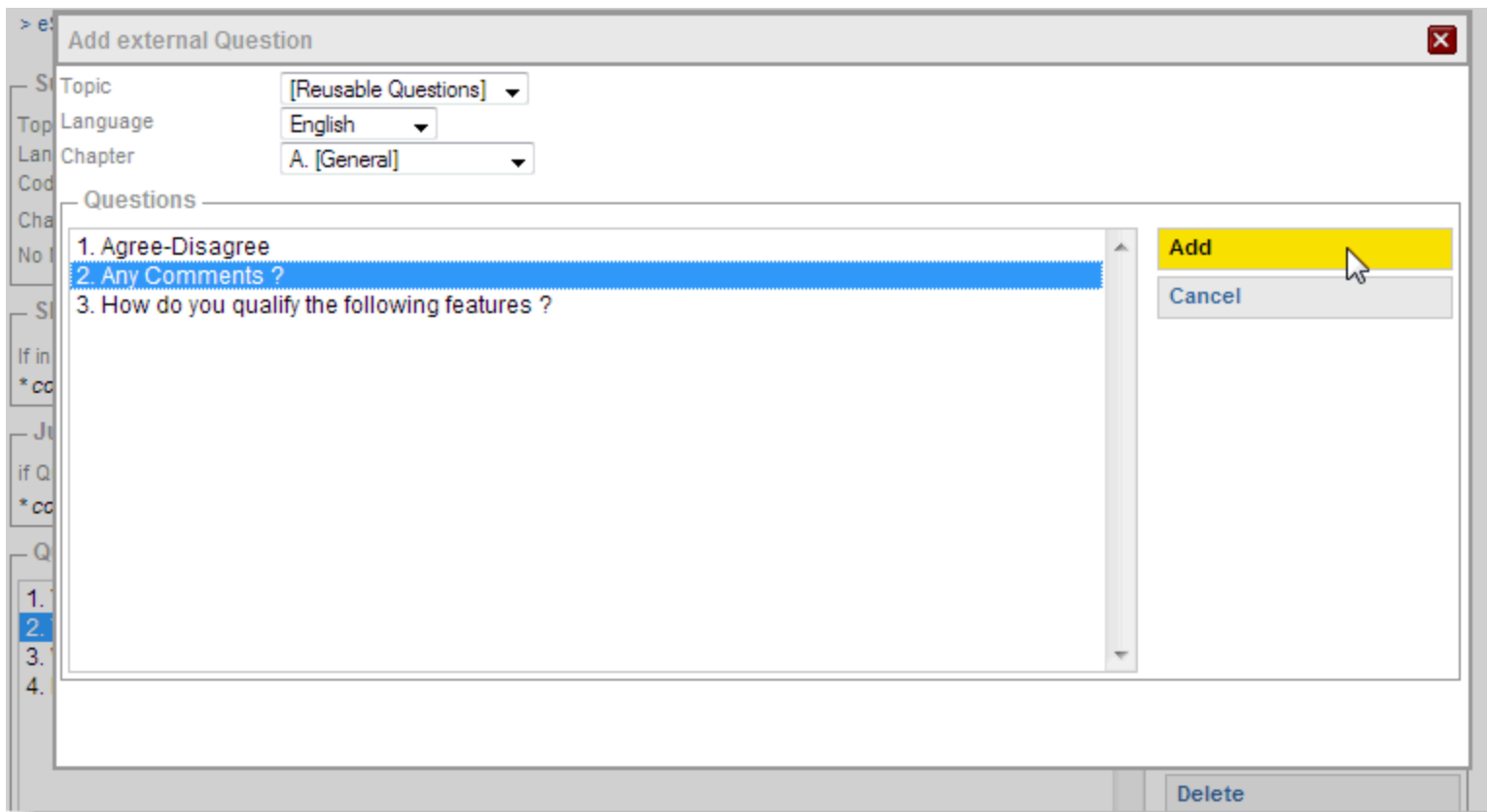
*\* complete only, after all questions have been entered*

## Questions\*

<ol style="list-style-type: none"><li>1. Your Name ?</li><li>2. Your Gender ?</li><li>3. What is your Color preference ?</li><li>4. How do you qualify the following features ?</li></ol>	<input type="button" value="Edit"/> <input type="button" value="Add"/> <input type="button" value="Add from..."/> <input type="button" value="Duplicate"/> <input type="button" value="Delete"/> <input type="button" value="▲"/> <input type="button" value="▼"/> <input type="button" value="Preview Chapter"/>
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*\* Do not change questions, once the eSurvey is being used (unless it are corrections of typos)  
A maximum of 30 questions is allowed per chapter*

Each chapter/page can contain up to 30 questions. Notice the Skip and Jump logic. Questions can be added, edited, and the chapter previewed.



Clicking 'Add From...' on the previous screen allows you to pick predefined question from e.g. a library of common questions, via a popup dialogbox

# Demo for TeamStudio

> eSurveys/Groups > Demo for TeamStudio > A. General Info Question 2

Save & Close

## 2. Your Gender ?

### Question Categorization

Topic	Test
Language	English
Chapter	A. General Info

### Question Definition

Nr	2
Question	Your Gender ?
Export Keyword	gender
Answer Type	Single Choice (radio)
Possible Answers*	Male M Female F

\* use | to separate user-visible answers from code-values. e.g. Very Satisfied|5

### Question Options

Information	
Question Title	<input type="checkbox"/> Leave out Question Title
Answer text on Top	<input checked="" type="checkbox"/> Put Answer text above Radiobutton/Checkbox
Nr of Columns	2
Width of field	200 px
Max. nr of chars	255 characters
'Other' Answer	<none>
Obligatory ?	<input type="checkbox"/> Answer is Required

### Preview

(Re-)Generate

### Your Gender ?

Male      Female

Each Question can have a type (Radio, Drop-down, Checkbox, Input, Comment. Notice the Options and the Preview sections.

### Question Definition

Nr

Question

Export Keyword

Answer Type

Possible Answers\*  
(max. 7)  
(horizontally)

Excellent|4  
Good|3  
Average|2  
Poor|1  
Very poor|0  
Not Applicable|NA

\* use | to separate user-visible answers from code-values. e.g. Very Satisfied|5

### Question Options

Information

Question Title  Leave out Question Title

Width of item col.  px

Matrix items\*\*  
(vertically)

Feature 1  
Feature 2  
Feature 3

\*\* use | to separate user-visible item from keyword-value. e.g. Airconditioning|Airco

### Preview

(Re-)Generate

How do you qualify the following features ?

	Excellent	Good	Average	Poor	Very poor	Not Applicable
Feature 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

This is an example of a matrix questions. Options change depending on the Answer type.

Definition, Design & Security | Chapters | **Audience** | Links for the End-User

Audience: Predefined Groups

**eSurvey Audience Groups**

Theo's Main Test Group  
All Women except for Belgium

Individual Group:

Entire Audience:  
  
 12-Jan-2009 17:35:  
 - Newly Created: 19  
 - Not recreated: 0

12-Jan-2009 17:35:  
 - New: 19  
 - Invited: 0  
 - Ongoing: 0  
 - Submitted: 1

A recently added part of the survey is Audience Management. This screen shows the groups you want to target, and some stats. Again the possibility to export.

**Audience Criteria**

Status: <All>   
 Country Area: <All>

**Notification**

Definitions: Initial Invitation  
Reminder

Send From: theo@xceed.be

Target:  
 Only to Sender  
 All from Criteria above  
 Only Selected below  
 Send All Emails to Sender for Testing

12-Jan-2009 17:39:  
Sent 'Reminder' to 19 people

**Overview**

99 | CH | DE | DK | ES | FI | FR | GB | GR | NL | NO | SA | SE | [No Country]

A

<input type="checkbox"/>	Name	Status	Start/Finish	SL	Location	Notification
<input type="checkbox"/>	Maria A...	Invited	Not started	01	National Office (Madr	12-01-2009: Reminde
<input type="checkbox"/>	Eva Maria...	Invited	Not started	07	Barcelona	12-01-2009: Reminde
<input type="checkbox"/>	Maria Teresa...	Invited	Not started	02	Barcelona	12-01-2009: Reminde
<input type="checkbox"/>	Maria...	Invited	Not started	01	National Office (Madr	12-01-2009: Reminde

This is the actual Notification area. You can send selected notification to a set of people. Note that you can browse the Audience inline.

### Notification

Survey Company Car Survey  
Unique Code TH-NO-XNOS-7N8MJH  
Notification Title

### Mail Content

Mail Subject

Body

[BANNER]

Dear [FIRSTNAME],

As we're conducting a Survey regarding our [B][SURVEY][B], we would like to invite you to take part.

Please follow this link to start the survey [LINK][SURVEY][LINK].

Thanks in advance for your co-operation.

The eSurvey Team

PS. If you have any questions please contact: [esurvey@ey.com](mailto:esurvey@ey.com)

First Name  
Last Name  
Country  
Area  
Service Line  
**eSurvey Banner**  
eSurvey Name  
eSurvey Link  
Bold  
Italic

You can create as many notification as you want.  
By using placeholders, you make the outgoing email personal.

### 3. Serviceline Effectiveness per Serviceline

**Report Definition**

Nr: 3

Description: Serviceline Effectiveness per Serviceline

Main Question: B. Content

Sub Question: 3. Inside CWEA is very effective in keeping me informed about my service line / internal support activities in the Area

Sub Question: D. Personal Situation

Value Type: Totals, 0 decimals

Generate:  Table  Graph

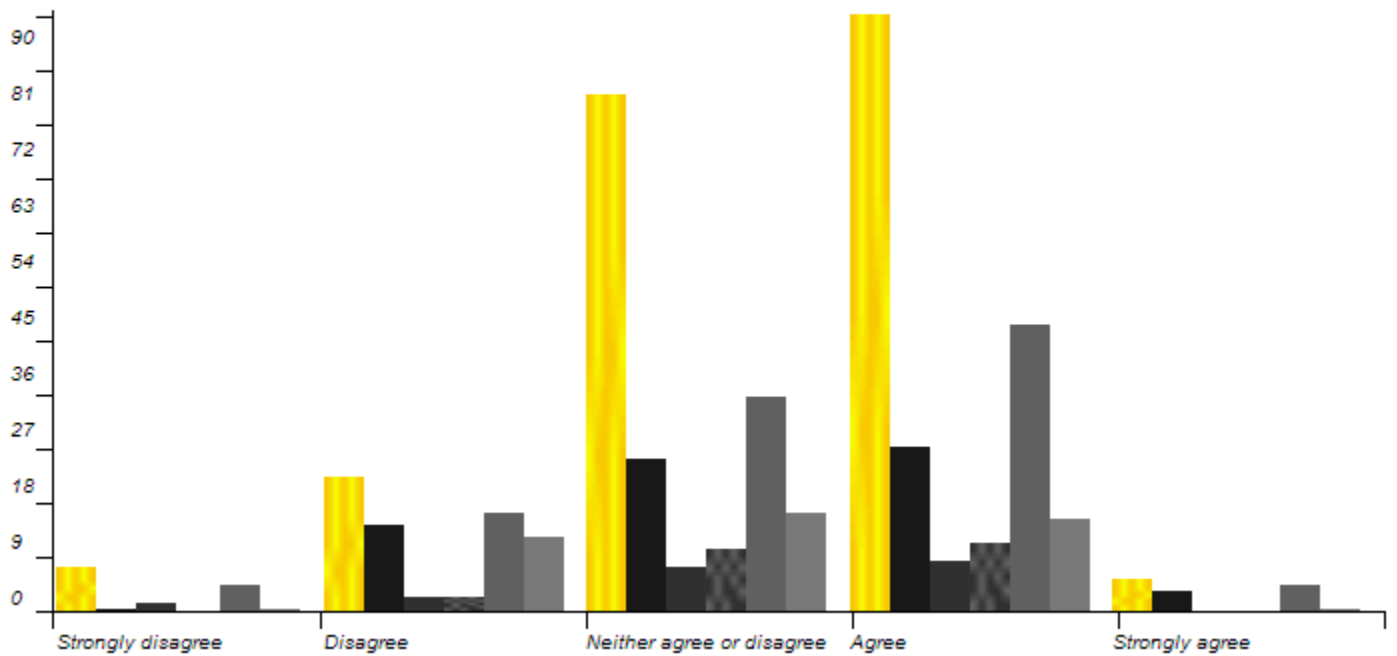
**Result Preview**

[\(Re-\)Generate Table](#)

Generated: 26-Apr-2005 11:49

Total entries: 996  
 Total entries filled-in: 503  
 Total entries skipped: 493

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	TOTAL
█ [Redacted]	8	23	86	99	6	222
█ [Redacted]	1	15	26	28	4	74
█ [Redacted]	2	3	8	9	0	22
█ [Redacted]	0	3	11	12	0	26
█ [Redacted]	5	17	36	48	5	111
█ Other	1	13	17	16	1	48
<b>TOTAL</b>	<b>17</b>	<b>74</b>	<b>184</b>	<b>212</b>	<b>16</b>	<b>503</b>



An example of an actual report definition. Many definitions can be created and generated together as one consolidated report.

## Demo for TeamStudio

### GENERAL INFO

Your Name ?

Theo

Your Gender ?

Male

Female



What is your Color preference ?



How do you qualify the following features ?

	Excellent	Good	Average	Poor	Very poor	Not Applicable
Feature 1	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Next

An eSurvey page as the end user would see it.