

CBE Occupant IEQ Survey Survey Setup Wizard User Guide

Introduction

The Survey Setup Wizard (Wizard) and the Survey Manager (Manager) is designed to create and manage surveys using existing instruments (survey templates) with limited number of customizations.

Login

Go to <http://www.cbesurvey.org/surveywizard>. Enter the username and password you are given. Check the “Login to Survey Manager” box if you would like to use the Manager. Click “Log In”.

Create a survey

To create a survey, you’ll first have to choose the building for which the survey is conducted. You can either choose one of the buildings from the list or create a new building by clicking on the “Add New Building” button. If you choose to add a new building, please make sure that all the information is correct before you click on the “Add Building” button. You will not be able to edit the building details afterwards. Click on the “Next” button on the bottom right after a building is selected from the list.

The next screen is the building contact screen. As the creator of the survey, your contact information will be automatically added to the list as an “Initial/Administrative Contact”, who is in charge of the administrative matters of the survey. There are two other types of contacts, “Invite Contact”, who is responsible for inviting occupants of the building to take the survey and “Facility Contact”, who will be contacted for detailed building characteristics for research purposes. At least one “Initial/Administrative Contact” is required for each building. Click on “Next” when all contacts are listed.

The “Survey Setup” screen contains the basic information regarding the survey, such as the survey name, starting date, ending date and the welcome message. All these information are required to conduct the survey. The instrument list at the bottom contains all the available survey templates based on which the new survey is created. You can select an instrument, and use the “View Instrument” button to browse through the categories, questions and answers contained in the instrument. Click on “Next” when all information is correctly entered.

The “Custom Background Questions” screen will appear if the selected instrument contains customizable questions. Each black box contains one customizable question. You’ll have to fill in all the textboxes, if any, in the question text for each question. The answer list may contain some existing answers. You are free to remove them, add more answer choices, or change the order of the choices using the “Up” and “Down” button, as long as there are at least two choices in the list. If a particular answer choice needs a follow-up question, select the answer choice and click on the “Sub Question” button (this choice is not available for all questions). Fill in the textboxes in the sub question text, add its answers choices, and click on “Save Sub Question”. Note that if an answer choice has a follow-up question, it will be followed by “(has subquestion)” in the question list (this will not appear on the actual survey). In a generated survey, for example, question number 1 has two choices A and B with A associated with sub question 1*. If A is chosen, the survey will go to a page contain question 1*, while if B is chosen, question 1* will be

skipped. Note that customizable questions will appear in either drop down list form or radio box for, no multiple choices allowed.

Last is the “Summary” screen, displaying all the information you’ve entered for the survey. Edit any incorrect entries as needed any click on the “Confirm” button to create the survey.

If the survey is created successfully, a link to the survey will be displayed on the last screen. You can go through the survey using the link, however, this is a internal link to the survey, and should not be sent to building occupants. You can also click on the “Survey Manger” link on this page to use the Manager to finish creating the survey.

Using the Survey Manager

The most basic use of the Survey Manage (Manager) is to view the status and properties of surveys created by the Wizard. This is done simply by selecting a survey from the list. The details of selected survey will be displayed on the right.

Both the “Number of Invitees” and “External Link” should be setup before officially starting the survey.

By entering a number into the “Number of Invitees” textbox and clicking on the “Update” button, you can change the number of invitees for the survey. This is necessary for statistical purposes.

The “External Link” area is used to create a nice survey link, instead of the complicated internal URL. Select the appropriate survey folder, and enter the name for the subfolder (an acronym of the survey for example). The “No Login” option will take survey takers directly to the Survey when they access the external link, while the “Email Login” option will ask the survey takers their email addresses first before proceeding. Once everything’s set, click on the “Make External Link” button to finish the process. And now, you can send out the newly created external link to survey takers.