

Axis Portal™

Surveys
User Manual



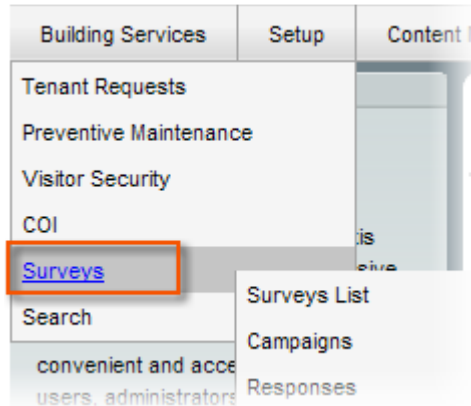
AXIS Portal Client Support
949.809.3605 | support@axisportal.com

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Surveys:

[Control Panel](#) > [Building Services](#) > [Surveys](#)



About Surveys:

The Surveys feature, powered by Angus AnyWhere™, is designed to enable your company to create surveys and invite your tenants to submit their feedback in order to gauge their satisfaction and better understand their needs.

A survey can be comprised of any combination of text, multiple choice and rating questions. Surveys can be configured by any user with appropriate permissions based on Role Security. By default any user can create surveys at the company level and at the property level.

When a survey is active, the system sends your tenants an e-mail following the submission of a work order. The e-mail invites them to click a link which takes them to your Survey web page where they can fill out your survey.

This is the main Surveys page, where you can add survey questions and choices, customize the welcome and thank you messages and assign properties. To access this screen, select surveys from the main menu.

Note:

- Once a Survey has been created, a Campaign needs to be created to distribute the Survey to Tenants.

SURVEY DETAILS

General Information

Survey name:

Welcome Message: ▲ ▢ ▼

Thank you Message: ▲ ▢ ▼

Questions

Questions

↓ ▢ Please rate the level of customer service provided by your management company: [Edit](#)

↑ ↓ ▢ Please rate the following list of issues on levels of importance to your employees: [Edit](#)

↑ Please let us know how we can provide even better customer service to your employees: [Edit](#)

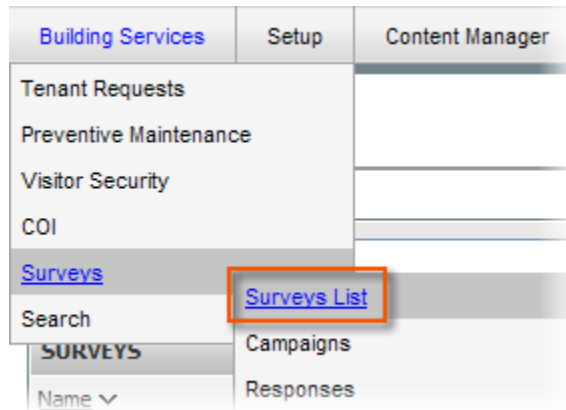
Properties

Available		Assigned
	<input type="button" value=">>>"/> <input type="button" value=">"/> <input type="button" value="<"/> <input type="button" value="<<<"/>	One Corporate Tower

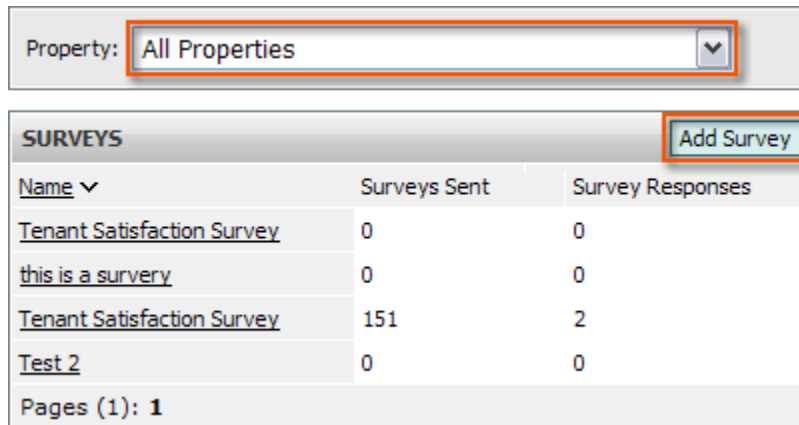
Setting Up Surveys:

Creating Surveys:

1. Click *Control Panel > Building Services > Surveys > Surveys List*



2. Select the applicable **Property**.
3. Click **Add Survey**.



4. Fill out the General Information: **Survey Name**, **Welcome Message**, and **Thank You Message**.

The screenshot shows a web interface titled "SURVEY DETAILS". Under the "General Information" section, there are three fields: "Survey name:" with the value "Tenant Satisfaction", "Welcome Message:" with the text "Please fill out so that we can better serve you.", and "Thank you Message:" with the text "Thank you!". Each label is highlighted with a red box. The text areas have up and down arrow icons on the right side.

5. To add questions, click **Add**.

The screenshot shows a section titled "Questions". It contains a table with two rows: "Questions" and "No Questions Available". An "Add" button is located in the top right corner of the table area and is highlighted with a red box.

6. Select a **Question Type** from the drop-down menu. Refer to **Question Types** for more information, or click on the links from the list of question types below. Question types include:
 - a. Choice-Based Questions
 - i. Multiple Choice
 - ii. Select Many
 - iii. Rating
 - b. Text- Based Questions
 - i. Text- Single Line
 - ii. Text- Multiple Lines

Questions

Questions Add

Question Type: Multiple Choice Help Insert Cancel

Question Text:

Answer Selections: Multiple Choice
Select Many
Rating
Text - Single Line
Text - Multiple Lines

Escalation Add Insert Cancel

Answer Selections Orientation: Vertical Horizontal

7. Select which properties' tenant will participate in this survey; assign a Property by moving it from the Available Properties list to the **Assigned Properties** list.
8. Click **Preview** to ensure its accuracy.
9. Click **Save**.

Properties

Available Assigned

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One Corporate Tower

SAVE **PREVIEW** RETURN TO LIST

Survey Questions:

About Questions:

The questions and choices you can add are designed so that there is a wide range of flexibility in the types of questions you can create. You can enter as many questions as you like with the only limitation being for the input choice style, where you are limited to up to ten choices per question.

Question Types:

There are two main types of questions:

- Choice-based Questions
- Text-based Questions

Choice- Based Questions:

There are three types of Choice-based Questions:

- **Multiple Choice** questions are composed of a text-based question with up to 10 different choices, where the tenant can only select one choice per question.
- **Select Many** questions are composed of a text-based question with up to 10 different responses, where the tenant can select up to all the responses provided.
- **Rating** questions are composed of a text-based question with up to 10 different subjective responses relating to Tenant satisfaction, where the tenant can only select one response.

Adding Choice- Based Questions:

1. Click **Add** to begin entering a question.
2. Click the **Question Type** field, and select a Choice-Based question; *Multiple Choice, Select Many, or Rating*.
3. Click the **Question Text** field, and enter the text for the question.

Questions **Add**

Question Type: [Help](#) [Insert](#) [Cancel](#)

Question Text:

Answer Selections:

Order	Text	Escalation	Add
	<input type="text"/>	<input type="checkbox"/>	Insert Cancel

Answer Selections Orientation: Vertical Horizontal

4. Enter the **Answer Selections** as follows:
 - a. Click the **Text** field and enter the text for the Answer selection.
 - b. If this answer selection requires sending an escalation e-mail, select the **Escalation** checkbox. For more information about escalations, see the [Survey Escalations](#) topic.
 - c. Click **Insert**.
 - d. Click **Add** to add another answer choice.

Questions **Add**

+ Were you satisfied with the response to your request? [Edit](#) [Delete](#)

Question Type: [Help](#) [Insert](#) [Cancel](#)

Question Text:

Answer Selections:

Order	Text	Escalation	Add
↓	Bad	No	Edit Delete
↑	Nothing Speical	No	Edit Delete
	<input type="text" value="Excellent"/>	<input checked="" type="checkbox"/>	Insert Cancel

Answer Selections Orientation: Vertical Horizontal

5. Click the up or down arrows to move the position of the answer depending on the order of how you want them to be displayed.
6. Select **Vertical** (up and down) or **Horizontal** (across) depending on how you want the answer choices to be displayed.
7. Click **Insert** to add the question.

Questions Add

Were you satisfied with the response to your request? Edit Delete

Question Type: Multiple Choice Help Insert Cancel

Question Text: What rating would you give the ease of your move-in?

Answer Selections:

Order	Text	Escalation	Add
↓	Bad	No	Edit Delete
↑ ↓	Nothing Speical	No	Edit Delete
↑	Excellent	Yes	Edit Delete

Answer Selections Orientation: Vertical Horizontal

Text-Based Questions:

There are two types of Text-based Questions:

- **Single line** text questions are composed of a text-based question with only one possible line of response by the tenant.
- **Multiple line** text questions are composed of a text-based question with up to 10 possible lines of response by the tenant.

Adding a Text-based (Single Line or Multiple Line) Question:

1. Click **Add** to begin entering the question.

Questions Add

Questions		
↓	<input checked="" type="checkbox"/> How do you like this?	Edit Delete
↑	<input checked="" type="checkbox"/> Rate our service 1-3	Edit Delete

2. Click the **Question Type** field and select a Text-Based question: *Text- Single Line* or *Text-Multiple Lines*.
3. Enter question into the text box.
4. Click **Insert** after you have completed entering the question.

Questions Add

↓	+	How do you like this?	Edit Delete
↑	+	Rate our service 1-3	Edit Delete
Question Type:		<input type="text" value="Text - Single Line"/>	Help <input type="button" value="Insert"/> <input type="button" value="Cancel"/>
Question Text:		<input type="text" value="Please share your thoughts on how we can better serve you"/>	

Campaigns:

[Control Panel](#) > [Building Services](#) > [Surveys](#) > [Campaigns](#)

About Campaigns:

Campaigns are a method for distributing and tracking your Surveys. They allow Surveys to be launched multiple times either at a corporate level or property level. For each survey, an unlimited number of campaigns can be managed. Not only do campaigns inherently support the relaunching of surveys, but they are a practical means to organizing responses by time (July Campaign, August Campaign) and location (New York Campaign, Boston Campaign). Furthermore, campaigns are available as filter criteria when navigating through survey responses and generating survey reports.

An Employee can only view campaigns that include at least one property that the employee is assigned to.

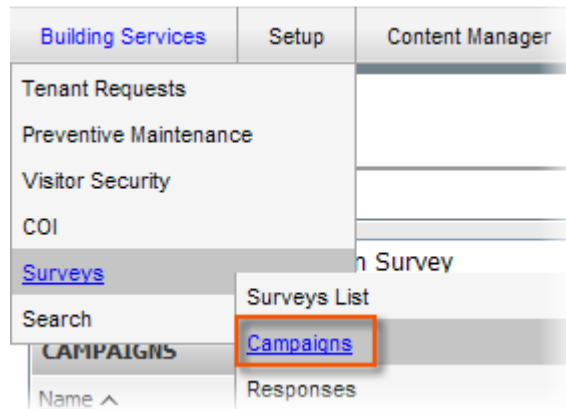
The Campaigns List is organized according to: **Survey, Name, Status, Launch Date, End Date, Surveys Sent, and Survey Responses.**

Survey: <input type="text" value="Tenant Satisfaction Survey"/>					
CAMPAIGNS Add Campaign					
Name ^	Status	Launch Date	End Date	Surveys Sent	Survey Responses
July Satisfaction Survey	Launched	7/17/09	10/1/09	52	2
July Tenant Satisfaction	Created		5/31/11	0	0
March Mayhem	Created		4/30/11	0	0
Tenant Satisfaction Survey	Launched	7/17/09	9/30/09	51	0
Pages (1): 1					

Creating Campaigns:

Note:

- A Survey must first be created before a Campaign can be created to distribute the Survey to Tenants.
1. Click *Control Panel > Building Services > Surveys > Campaigns*



2. Select the survey you would like to create a campaign for from the Survey drop-down menu.
3. Click **Add Campaign**.

The screenshot shows the Campaigns form with the following elements: a Survey dropdown menu with 'Tenant Satisfaction Survey' selected, a list of campaigns, and an 'Add Campaign' button. The 'Add Campaign' button is highlighted with a red box.

Name ^					
July Satisfaction Survey	Launched	7/17/09	10/1/09	52	2
July Tenant Satisfaction	Created		5/31/11	0	0
Tenant Satisfaction Survey	Launched	7/17/09	9/30/09	51	0

Pages (1): 1

4. Fill the **Title** and **Description** and **End Date**.
5. Select a **Distribution option**. There are two ways to distribute a campaign:
 - I. One survey invitation is sent to a single service requestor for every user defined number of work orders completed.
 - II. Upon launching the campaign a survey invitation e-mail will be sent to all active tenants in the Assigned Properties list.

CAMPAIGN DETAILS

General Information

Survey: Tenant Satisfaction Survey

Title:

Description:

Until when should survey responses be accepted?

How should surveys of this campaign be distributed?

Every Completed Work Orders [Help](#)

Upon Launch

6. Assign Properties by moving **Available** properties to the **Assigned Properties** list using the arrow buttons.
7. Click **Save Campaign** to Launch the Campaign at a later date or proceed to step 8.

Note:

- After a campaign is *launched*, it cannot be changed from one Survey to another.

Properties

Available

Assigned

One Corporate Tower

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>

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<<<

SAVE CAMPAIGN

PREVIEW SURVEY

LAUNCH

BACK TO LIST

8. If both campaign and survey are ready for distribution, click the **Launch** button. Refer to [Launching a Campaign](#) for more information.

Launching a Campaign:

Follow the proceeding steps once a Campaign and Survey have been created. If you have not done so, refer to [Creating Surveys](#) or [Creating Campaigns](#) for a step by step process.

1. Click [Control Panel > Building Services > Surveys > Campaigns](#)
2. Select the **Survey** from the drop-down menu for which you would like to launch a Campaign.
3. Locate and click on the desired **Campaign**.

Survey: Tenant Satisfaction Survey ▼

CAMPAIGNS						Add Campaign
Name ^	Status	Launch Date	End Date	Surveys Sent	Responses	
July Satisfaction Survey	Launched	7/17/09	10/1/09	52	2	
July Tenant Satisfaction	Created		5/31/11	0	0	
March Mayhem	Created		4/30/11	0	0	
New Tenants	Launched	3/29/11	3/31/11	0	0	
Tenant Satisfaction Survey	Launched	7/17/09	9/30/09	51	0	

Pages (1): 1

4. Ensure all previously entered information is correct.
5. Click **Preview Survey** to ensure its accuracy.
6. Click the **Launch** button.

CAMPAIGN DETAILS

General Information

Survey:

Title:

Description:

Until when should survey responses be accepted?

How should surveys of this campaign be distributed?

Every Completed Work Orders [Help](#)

Upon Launch

Properties

Available

Assigned

One Corporate Tower

SAVE CAMPAIGN PREVIEW SURVEY LAUNCH BACK TO LIST

Notes:

- Launching a campaign will make it "live" and will begin generation of surveys based on your settings. Before launch, a message will pop up if Survey format has not been changed from the default format to reflect customized Company information.
- Once launched, questions and choices **cannot** be modified to preserve survey integrity. Only the wording can be changed if errors have been made or needs to be re-worded as long as meaning is not changed.
- Surveys must be customized before they are launched. Survey customization is part of the Angus AnyWhere™ implementation process. If your survey is not customized, contact your Implementation Manager.
- If you attempt to launch a survey that is not customized you will encounter an error message. Do not proceed with launching your survey until it is customized.

Ending a Campaign:

Campaigns can end one of two ways:

- I. When the Campaign is created, an End Date can be entered by clicking on the calendar icon in the General information section and selecting a date. Survey Responses will be accepted until this date.
- II. At any point after a Campaign has been Launched, it can be ended by clicking the End Campaign button at the bottom of the Campaign Details page. Follow the proceeding steps.
 1. Click [Control Panel > Building Services > Surveys > Campaigns](#)
 2. Select the **Survey** from the drop-down menu that the Campaign falls under.
 3. Click on the **Campaign** you wish to end.

Survey: Tenant Satisfaction Survey

CAMPAIGNS						Add Campaign
Name ^	Status	Launch Date	End Date	Surveys Sent	Responses	
July Satisfaction Survey	Launched	7/17/09	10/1/09	52	2	
July Tenant Satisfaction	Created		5/31/11	0	0	
March Mayhem	Created		4/30/11	0	0	
New Tenants	Launched	3/29/11	3/31/11	0	0	
Tenant Satisfaction Survey	Launched	7/17/09	9/30/09	51	0	

Pages (1): 1

4. Click **End Campaign** at the bottom of the page.

PREVIEW SURVEY END CAMPAIGN BACK TO LIST

5. Click **Yes** to confirm.



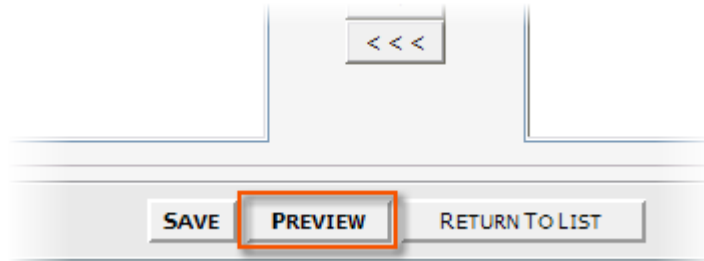
Please confirm that you wish to end this campaign.

Previewing Surveys:

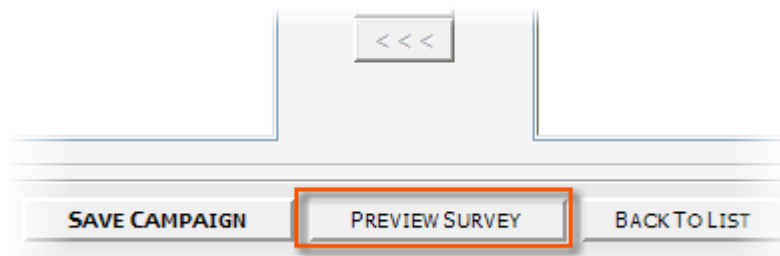
You can preview a survey from both the Survey Details and Campaign Details pages before actually launching it. This allows for a demonstration of the survey that will be going out to the Tenants.

It is strongly recommended that you preview your survey before you launch it. To

1. In the **Survey Details** page, click the **Preview** button, or:



2. In the **Campaign Details** page, click the **Preview Survey** button.



3. The preview survey is displayed in a new window. You can preview the welcome screen, the survey screen and the thank you screen.

Tenant Survey

Tenant Satisfaction Survey

1 Please rate the level of customer service provided by your management company:

- Poor
- Needs Improvement
- Average
- Good
- Outstanding

2 Please rate the following list of issues on levels of importance to your employees:

- Quick Response
- Friendly Demeanor
- Quick Resolution
- Follow Up

3 Please let us know how we can provide even better customer service to your employees:

SUBMIT SURVEY

Survey Escalation:

The Survey Escalations feature allows you to send an e-mail notification to specified recipients whenever a tenant submits negative feedback in a survey.

If it has not already been setup for you, please contact your AXIS Portal representative.

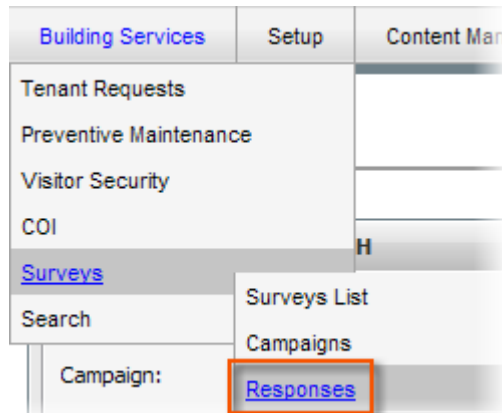
Survey Responses:

View Survey Responses:

Each Campaign can be searched to view the responses of individual Contacts either **manually** through Method 1 or **automatically** through Method 2.

Method 1:

1. Click *Control Panel > Building Services > Surveys > Responses*



2. Choose a **Survey** and **Campaign**. You can additionally filter your search further based on *Property, Tenant* and *Date Completed*.
3. Click **Search**. The search results will be displayed.

A screenshot of a search form titled 'COMPLETED SURVEYS SEARCH'. The form contains several input fields: 'Survey:' with a dropdown menu showing 'Tenant Satisfaction Survey' (highlighted with a red box), 'Campaign:' with a dropdown menu showing 'New Tenants' (highlighted with a red box), 'Property:', 'Tenant:', and 'Assigned To:' (all with empty dropdown menus). To the right, there are date selection options: 'Date Completed:' with radio buttons for 'Year:' and 'Month:' (both with dropdown menus), and 'From:' and 'To:' (both with calendar icons). At the bottom of the form, there are two buttons: 'SEARCH' (highlighted with a red box) and 'RESET'.

4. Click **View Answers** to see the Survey Response Details of individual Contacts.

SEARCH RESULTS FOR CAMPAIGN: JULY SATISFACTION SURVEY 2 completed surveys					
Property ▾	Building	Tenant	Contact	Date Completed	
One Corporate Tower	Tower One	Turner Services	Brody Jenner	7/17/09 2:43 PM	View Answers
One Corporate Tower	Tower One	AXIS Portal	Chris Marocchi	7/17/09 1:59 PM	View Answers

Pages (1): 1

Method 2:

1. Navigate to [Control Panel > Building Services > Surveys > Campaigns](#)
2. Select a **Survey** for which you would like to view responses for from the drop- down menu. A list of campaigns that utilized the selected survey will display.

Note:

- The Survey Responses column displays a quick status of survey responses.
3. **Left- click** anywhere in the row of the desired **Campaign** except on the Campaign Name link.
 4. A pop-up menu will display, and then click on **View Responses**.

Survey: ▾

CAMPAIGNS						Add Campaign
Name ^	Status	Launch Date	End Date	Surveys Sent	Survey Responses	
July Satisfaction	Closed	7/17/09	10/1/09	52	2	
July Tenant Satisfaction	Created					
New Tenants	Closed	3/29/11				
Tenant Sat	Created					
Tenant Satisfaction	Closed	7/17/09	9/30/09	51	0	

Pages (1): 1

5. You will be redirected to the **Completed Surveys Search** with the search criteria and results already displayed.
6. Click on **View Answers** to see the Survey Response Details of individual Contacts.

COMPLETED SURVEYS SEARCH

Survey: Date Completed: Year: Month:

Campaign: From: To:

Property:

Tenant:

Assigned To:

SEARCH RESULTS FOR CAMPAIGN: JULY SATISFACTION SURVEY 2 completed surveys

Property	Building	Tenant	Contact	Date Completed	
One Corporate Tower	Tower One	Turner Services	Brody Jenner	7/17/09 2:43 PM	View Answers
One Corporate Tower	Tower One	AXIS Portal	Chris Marocchi	7/17/09 1:59 PM	View Answers

Pages (1): 1

7. Responses are displayed as such:

SURVEY RESPONSE DETAILS Record 1 of 2

Survey Information

Survey: Tenant Satisfaction Survey
 Campaign: July Satisfaction Survey
 Date Completed: 7/17/09 2:43 PM

Contact Information

Contact name: Brody Jenner
 Property: One Corporate Tower
 Building: Tower One
 Tenant: Turner Services
 Phone: 213.555.6543
 Email: veraaa76@123hotmail.com

Answers

Questions

- Q: Please rate the level of customer service provided by your management company:
A: No answer
- Q: Please rate the following list of issues on levels of importance to your employees:
A: No answer
- Q: Please let us know how we can provide even better customer service to your employees:
A: hello Rex