



iTacit Quick Reference Guide

Surveys

PROPRIETARY NOTICE

The material contained in this document is proprietary to iTacit Inc.
No part of this document may be reproduced or used by third parties without the
written permission of iTacit Inc.

www.iTacit.com

(This document was last revised on April, 2016)

Table of Contents

Introduction	4
Infrastructure Requirements	4
Media Recommendations	5
Surveys	6
Create a Survey Questionnaire	6
Create a Survey Campaign	9
Viewing/Printing Survey Results	10
Creating Standard Responses	11
Creating Display Values	12
Creating Survey Permissions	13
Creating Survey Campaign Permissions	14

Introduction

Welcome to your Site powered by iTacit. This guide is designed to walk you through common Set-Up and Maintenance activities in your top left-hand **Menu**.

For more information regarding regular Dashboard Tools and activities, please refer to the *Welcome iCourse for Employees or Managers*, assigned to you in your “My Training” dashboard tool and available in the Training Catalog.

Infrastructure Requirements

To provide a great customer experience, iTacit has some basic technology requirements and recommendations for people using it. We do our best to provide support for popular computers, laptops, tablets, and smartphones, using popular browsers.

If you have any issues with your device or browser, check our recommendations below, or contact your iTacit representative or the helpdesk@itacit.com team.

Internet Browsers

- Microsoft Internet Explorer (IE) 9 (or newer)
- Mozilla Firefox 4 (or newer)
- Safari 5.1 (or newer)
- Google Chrome 10 (and above)

Plug-Ins

- Adobe Acrobat Reader

Adobe Flash (Supported Media File type)

Adobe Flash support has progressively declined in recent years making it incompatible with most popular and modern browsers. Flash players are currently not supported for iOS and Android devices on all modern browser versions.

It is still possible to consume flash-based media on desktops and laptops primarily using Chrome. If using Internet Explorer, an IE8 compatibility mode is currently enforced in iTacit in order to enable compatibility.

iTacit recommends avoiding the consumption of flash based media going forward due to the diminishing level of support.

Media Recommendations

Looking to spice up your training courses with Media? Sending an attachment to a message to simplify your Communication? Great! For best results in image quality and playback, please take a look at the guidelines below:

Images:

Formats	.JPG and .PNG	
Resolution	72 dpi	
Size Recommendations (in pixels)		
	Optimum	Maximum
Employee Avatars (headshots)	64x64	256x256
Logos for Training Courses, News Articles	256x256	512x512
Images for course content	512x512	1024x768
Images for course content (which may be zoomed to full-screen)	800x600	1920x1080

Packaged Courses:

Formats:

- .AICC
- SCORM 1.2
- SCORM 2004
- Tin Can

HTML formats can also be used to import course content into the iTacit iCourse area.

Video:

Format	.MP4, MOV, and .GIF
Codec (plug-ins)	H.264, AAC
Maximum dimension	1280 x 720 (720p) 720p is the recommended maximum size. If full screen video playback of a video is not anticipated, then a size should be considered.
File Size	Video files exceeding 20 MB should be assessed to see if they can be shortened.
Video Length	Should be limited to 2 minutes or less, to prevent excessive file sizes. Can your video be chunked/broken into chapters or sections? Learners will also benefit!
Processing	Video is bandwidth-intensive. Videos should be processed through a compression utility (such as Vimeo, YouTube or similar), to ensure that it is as lightweight as possible. Direct upload of raw-captured video should be avoided.

Attachments:

Format	PDF Document Files (Optimal)
iTacit allows the uploading of other document types. Document types, other and Adobe Acrobat, require the existence of software on the viewing device that is capable of opening the uploaded document type. For example, if you upload a Microsoft Word (.doc) document, the viewing user must have Microsoft Word installed on their device to view that document.	
Maximum Size Recommendations (in MB)	
My Messages	10 MB due to mail server processing
iCourse Reference Documents, Training Catalogue Item Documents, Employee Documents	20MB

Surveys – Standard Use

Surveys are sent out to staff through Survey Campaigns, which enables the re-use of any Survey Questionnaire you create. To send out a survey to staff you must first create the Survey Questionnaire.

Create a Survey Questionnaire

1. Select **Menu > Surveys > Surveys**.
2. Select **New**. In the *Default* screen enter the **Survey Title**.
 - a. Select **Ready for use**.
 - b. Enter **Notes** (if applicable).
 - c. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
 - i. To set permissions for who can edit or use the Survey in a campaign without a predetermined permission group select **Change**.
 1. Search for the desired **Group, Business Unit, Job Classification, Role and/or Employee**.
 2. Select **Add** to include your selection to the desired section.
 3. Select **Who does this include?** to view the names of employees included in the desired section.
 4. Select **X**.



If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.

3. In the *Calculated Value* screen select the **Display Value**. This will determine how you view the collective score of all survey responses.
 - a. Select the **Target Level**.
 - b. Select **Apply**.

4. Select **New > Section** to begin creating a new section of questions in your survey.
 - a. Enter the **Section Title**.
 - b. Enter a **Description** (if applicable).
 - c. Select **Automatically number questions in this section** (if applicable).
 - d. In the section *Allow this section to be*:
 - i. Select **Copied** (to make the section available for copy and edit in other surveys).
 - ii. Select **Referenced** (to make the section available for copy only).
 - e. Select **Apply**.

5. With the desired Section selected in the table of contents on the left select **New > Question** to create a question under that section.
6. Enter the **Question** contents in the textbox.
 - a. If the question is optional, unselect the **Required** checkbox.
 - b. Select the question type.
 - i. **Multiple Choice** or **Multiple Select** questions are automatically scored based on the values set in each response or as determined by a **Standard Response Set**. To create new responses:
 1. Select **New**.
 2. Enter **Response**.
 3. Enter **Score** for the selected answer.
 - c. In the section *Allow this question to be*:
 - i. Select **Copied** (to make the question available for copy and edit in other surveys).
 - ii. Select **Referenced** (to make the section available for copy only).
 - d. Select **Apply**.

New Employee Orientation ...
Sent out to all new employees one month after:

Introduction

Section 1: Orientation and Tr...

1. Did you complete on-line ed... 1

***Question:**

1. Did you complete on-line education as part of your orientation?

Required: ☒ If this question is not required and has a score, it will be treated like a bonus question.

Multiple Choice

Use standard response set:
Yes/No

Leave score blank to denote a "Not Applicable" response.

Response	Score
Yes	1
No	0

Allow this question to be

☐ Copied (can be edited in other questionnaires)

☐ Referenced (cannot be edited in other questionnaires)



Repeat **steps 4 – 6** to continue creating sections and questions.

7. Select **Done**.

Create a Survey Campaign

Once all survey questions have been set up in your Survey Questionnaire, create a Survey Campaign to schedule the survey campaign and identify participants in the survey.

1. Select **Menu > Surveys > Survey Campaigns**.
2. Select **New**. Enter the **Campaign Name**.
 - a. Select the desired Survey (questionnaire) to associate with the campaign.
 - b. Enter any **Survey campaign completion instructions** (if applicable).
 - c. Choose a predetermined permission group by selecting the dropdown by **Permissions**.
 - i. To set permissions without a predetermined permission group select **Change**.
 1. Search for the desired **Group, Business Unit, Job Classification, Role** and/or **Employee**.
 2. Select **Add** to be add your selection to the desired section.
 - **"Who can edit this survey campaign?"** – will limit the employees who have access to modify the Survey Campaign itself.
 - **"Who is this survey campaign targeted to?"** – will dictate the group of employees who will receive Survey once the campaign is published.
 - **"Who can view the results for this survey campaign?"** - will limit visibility of the item and results only to identified groups/ individuals, regardless of their access to the survey tools.
 3. Select **X**.
 - d. Set the **Publish date**.
 - e. Set the **End date** (if applicable).
 - f. Unselect **Anonymous** if tracking employee responses is required.
 - g. Select **Apply**.
 - h. Set the status to **Ready to be published** to automatically publish the campaign on the publish date set in **step d**.
 - i. A notification window will appear confirming the publish date and number of employees that will receive the survey, select **OK**.
3. Select **Done**.

The screenshot shows the 'New Survey Campaign' form. Callouts are as follows:

- a**: Points to the 'Survey' dropdown menu.
- b**: Points to the 'Survey campaign completion instructions' text area.
- c**: Points to the 'Permissions' dropdown menu.
- d**: Points to the 'Publish date' field.
- e**: Points to the 'End date' field.
- f**: Points to the 'Anonymous' checkbox.
- g**: Points to the 'Apply' button.
- h**: Points to the '*Status' dropdown menu.

The form includes sections for 'Who can edit this survey campaign?' and 'Who is this survey campaign targeted to?' with lists of roles and departments.



Once a survey campaign is published, it is not recommended to make any changes to the target group nor the schedule. Ensure that all details are correct before publishing or cancel the survey and re-assign.

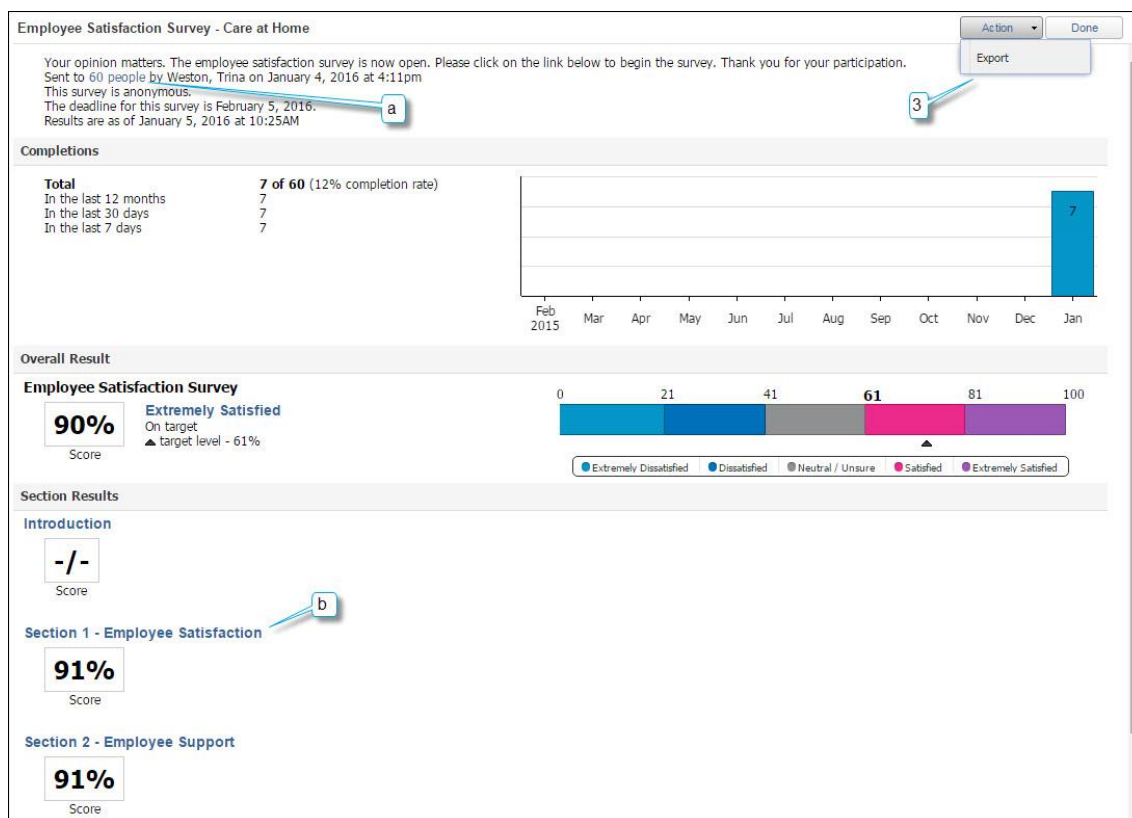
Viewing/Printing Survey Results

1. Select the **My Survey Campaigns** dashboard tool on the *Home* page.



If you do not have this dashboard tool, but require access to view survey results, please reach out to Helpdesk at helpdesk@itacit.com.

2. Select the desired **Survey Campaign** to view its results.
 - a. To view who the survey was sent to, select **# of people** option in the detailed section of the campaign.
 - b. Select the **Section Title** to view the survey section details.
3. Select **Action > Export** to print an Excel printable report.



Surveys - Configuration

Creating Standard Responses

If all questions in your survey utilize the same subset of answers and values, it may be valuable to set up a set of Standard Responses to use in your Survey Questionnaire.

1. Select **Menu > Surveys > Standard Responses**.
2. Select **New**. Enter the **Name** of the set of standard responses.
 - a. In the *Responses* section select **New**.
 - i. Enter the **Response** option.
 - ii. Enter **General Descriptor** (if applicable).
 - iii. Enter the **Score** for the selected response.
 - iv. Select **Apply**.
 - b. Repeat **step a** to continue creating the response set.
3. Select **Done**.

The screenshot shows the 'Standard Responses' configuration window. At the top, there are navigation arrows and buttons for 'New', 'Delete', 'Apply', and 'Done'. A callout '2' points to the 'New' button. Below this, the '*Name:' field contains 'Extremely Satisfied to Extremely Dissatisfied', with a callout '3' pointing to it. The 'Active:' checkbox is checked. Below the name field, there are two tabs: 'Responses' and 'Categories'. The 'Responses' tab is selected, showing a list of response options: (5) Extremely Satisfied, (4) Satisfied, (3) Neutral, (2) Dissatisfied, and (1) Extremely Dissatisfied. A callout 'a' points to the 'New' button in the 'Responses' section. To the right of the list, there are fields for '*Response:', 'General Descriptor:', and 'Score:'. Callouts 'i', 'ii', and 'iii' point to these fields respectively. Callout 'iv' points to the 'Apply' button. The 'Score' field contains the value '5'. A note below the 'Score' field states: 'Leave score blank to denote a "Not Applicable" response.'

Creating Display Values

iTacit offers a few sample scales to determine the collective responses of your survey, such as a Satisfaction Survey and a Strongly Agree to Disagree scale. Additional value ranges may be created.

1. Select **Menu > Surveys > Display Values**.
2. Select **New**. Enter the **Name** of the set of display values.
 - a. In the *Values* section select **New**.
 - i. Enter the **Display Value** option.
 - ii. Enter **General Descriptor** (if applicable).
 - iii. Enter the **Range** and **to** for the selected display value.
 - iv. Select **Apply**.
 - b. Repeat **step a** to continue creating the set of display values.
3. Select **Done**.

The screenshot shows the 'Display Values' configuration window in iTacit. The window has a title bar with navigation arrows and buttons for 'New', 'Delete', 'Apply', and 'Done'. Below the title bar, there's a field for '*Name:' containing 'Employee Satisfaction Survey' (labeled 3) and an 'Active:' checkbox. A 'Values' section contains a table with 'Range' and 'Display Value' columns. The table lists five ranges from '0 - 20 %' to '81 - 100 %' with corresponding display values like 'Extremely Dissatisfied' (labeled i) and 'Extremely Satisfied'. To the right of the table is a form for editing a value, with fields for '*Display Value:' (containing 'Extremely Dissatisfied', labeled a), 'General Descriptor:', '*Range:' (containing '0', labeled iii), and '*to:' (containing '20', labeled iv). Buttons for 'New', 'Delete', 'Apply', and 'Cancel' are at the bottom right of this form. Callout numbers 1 through 4 point to specific elements: 1 points to the 'New' button in the title bar, 2 points to the 'Name' field, 3 points to the 'Name' field content, and 4 points to the 'Apply' button in the form.

Creating Survey Permissions

Setting up Survey Permissions may save time when creating new Surveys, particularly when multiple surveys are created per Business Unit (with roles or individuals consistently responsible to edit and use).

1. Select **Menu > Surveys > Survey Permissions**.
2. Select **New**. Enter the **Name** of the permission group.
 - a. Search for the desired **Group, Business Unit, Job Classification, Role** and/or **Employee**.
 - b. Select **Add** to be add your selection to the desired section.
 - c. Select **Who does this include?** to view the names of employees included in the desired section.
3. Select **Done**.



If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.

The screenshot shows the 'Survey Permissions' dialog box. It has a title bar with a close button. Below the title bar are buttons for 'New', 'Delete', 'Apply', and 'Done'. A callout '2' points to the 'New' button. Below these buttons is a text field for '*Name:' containing 'Best Practice Survey'. Below that is an 'Active:' checkbox which is checked. To the left is a 'Permissions' section with five dropdown menus: 'Group', 'Business Unit', 'Job Classification', 'Role', and 'Employee', each with '(All)' selected. A callout 'a' points to the 'Group' dropdown. To the right of these dropdowns are 'Add >>' and 'Remove' buttons. A callout 'b' points to the 'Add >>' button. To the right of these buttons is a section titled 'Who can edit this survey?' with a callout 'c' pointing to the 'Who does this include?' link. Below this link is a table with two columns. The first column lists 'Human Resources (HR) Chalmers Hospital' and 'Human Resources (HR1) George Dumont'. The second column lists 'Human Resources ~ Fredericton Hospital ~ Salem Health' and 'Human Resources ~ Moncton Hospital ~ Salem Health'. Below this table is a section titled 'Who can use this survey in a survey campaign?' with an 'Add >>' button and a 'Remove' button.

Creating Survey Campaign Permissions

Setting up Survey Campaign Permissions will save time when frequently publishing Surveys to consistent groups or Business Units.

1. Select **Menu > Surveys > Survey Campaign Permissions**.
2. Select **New**. Enter the **Name** of the permission group.
 - a. Search for the desired **Group, Business Unit, Job Classification, Role** and/or **Employee**.
 - b. Select **Add** to be add your selection to the desired section.
 - c. Select **Who does this include?** to view the names of employees included in the desired section.
3. Select **Done**.



If you accidentally add the wrong group(s) to a permission section, highlight the group and select **Remove**.

The screenshot shows the 'Permissions' window with the following elements and callouts:

- 2**: Points to the 'New' button at the top right.
- a**: Points to the 'Add >>' button next to the 'Permissions' list.
- b**: Points to the 'Remove' button next to the 'Permissions' list.
- c**: Points to the 'Who does this include?' link for the 'Who can edit this survey campaign?' section.
- 3**: Points to the 'Done' button at the top right.

The interface includes a search bar for '*Name: Care at Home', an 'Active' checkbox, and several dropdown menus for 'Group', 'Business Unit', 'Job Classification', 'Role', and 'Employee'. The 'Permissions' list on the left shows various roles and their associated permissions. The right side of the window displays three sections: 'Who can edit this survey campaign?', 'Who is this survey campaign targeted to?', and 'Who can view the results of this survey campaign?'. Each section has a table of roles and their associated permissions, with a 'Who does this include?' link for each section.