iTacit Quick Reference Guide

Surveys

(This document was last revised on April, 2016)

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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

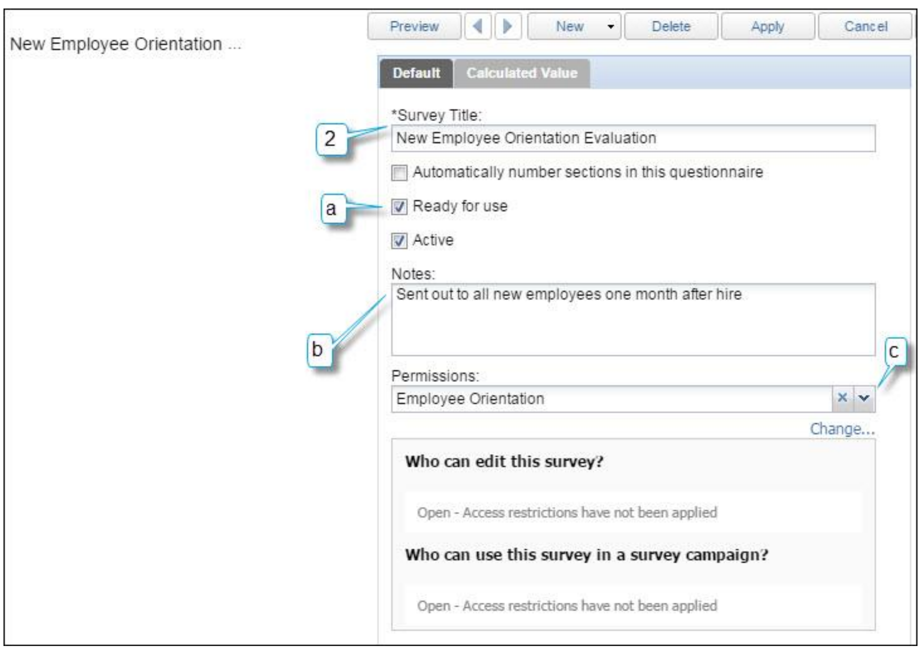
Surveys are sent out to staff through Survey Campaigns, which enables the re-use of any Survey Questionnaire you create. To send out a survey to staff you must first create the Survey Questionnaire.

Create a Survey Questionnaire

1. Select **Menu** > **Surveys** > **Surveys**.

2. Select **New**. In the *Default* screen enter the **Survey Title**.

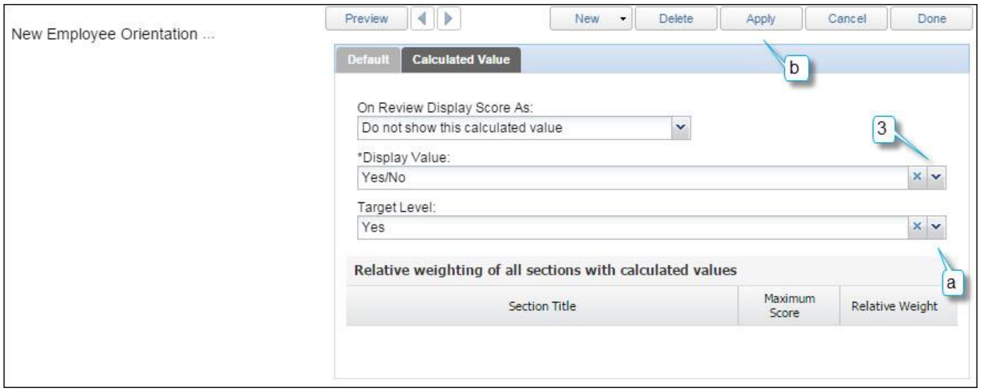
   a. Select **Ready for use**.
   b. Enter **Notes** (if applicable).
   c. Choose a predetermined permission group by selecting the dropdown option by **Permissions**.
      i. To set permissions for who can edit or use the Survey in a campaign without a predetermined permission group select **Change**.
         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**.

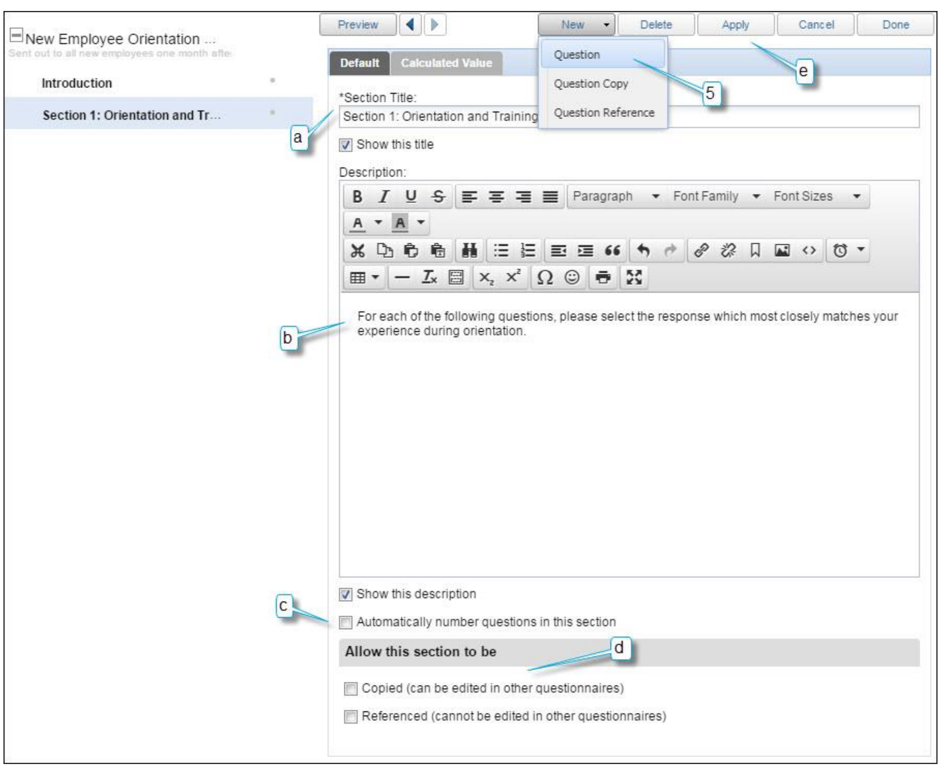
3. In the *Calculated Value* screen select the **Display Value**. This will determine how you view the collective score of all survey responses.

    a. Select the **Target Level.**
    b. Select **Apply**.



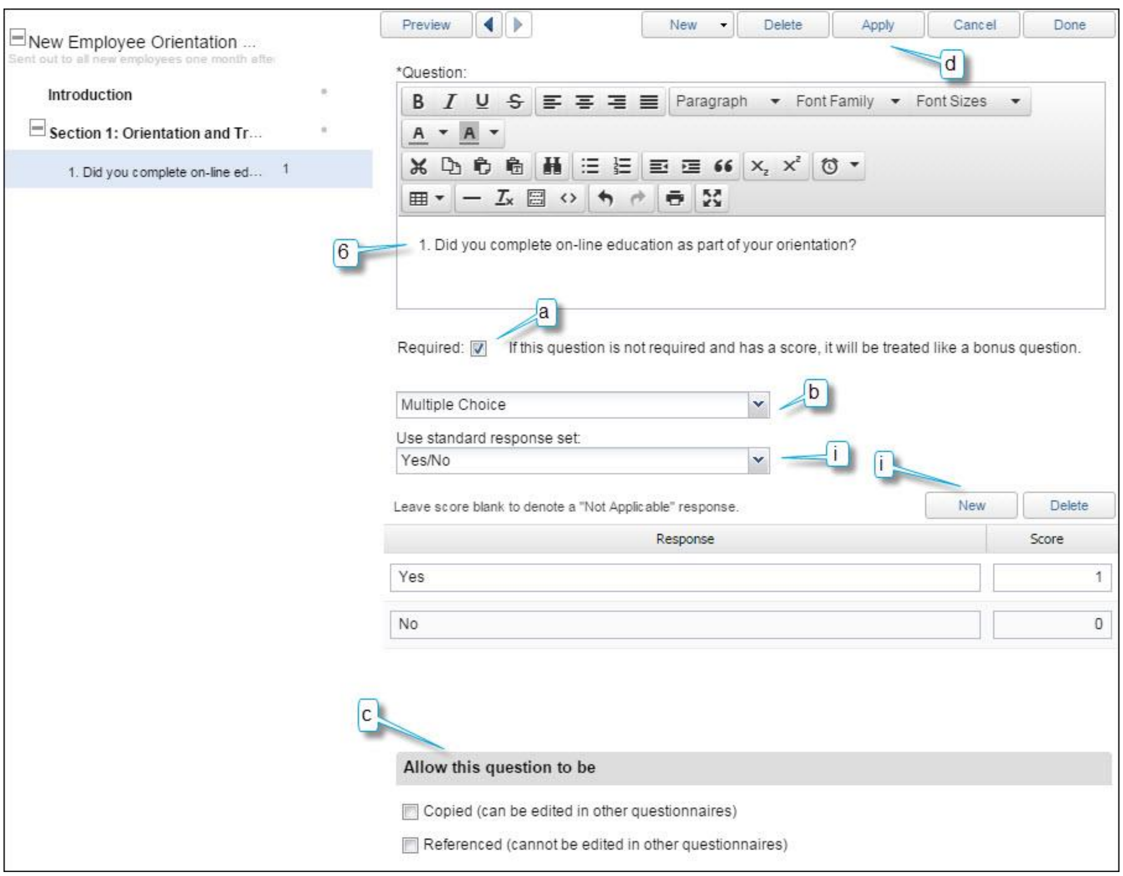
4. Select **New** > **Section** to begin creating a new section of questions in your survey.

    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**.



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

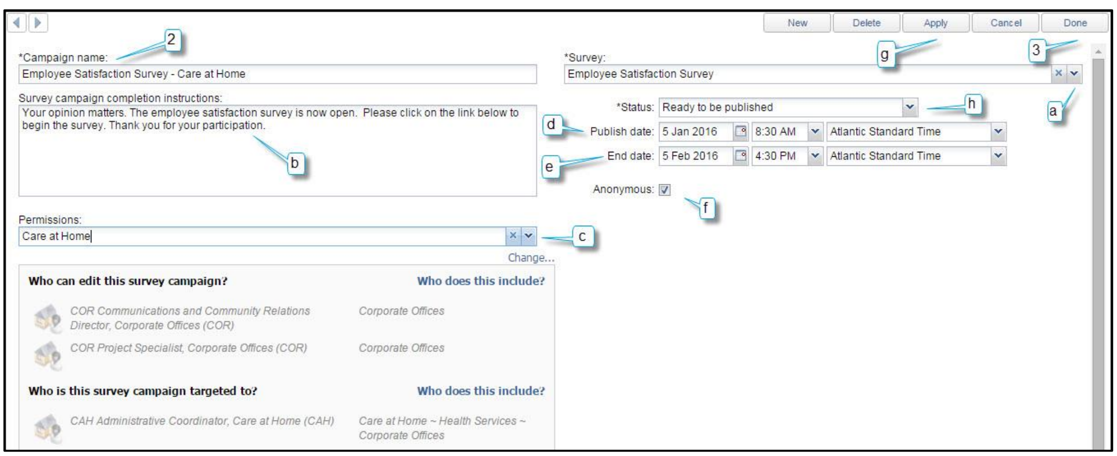
7. Select **Done**.

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**.



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

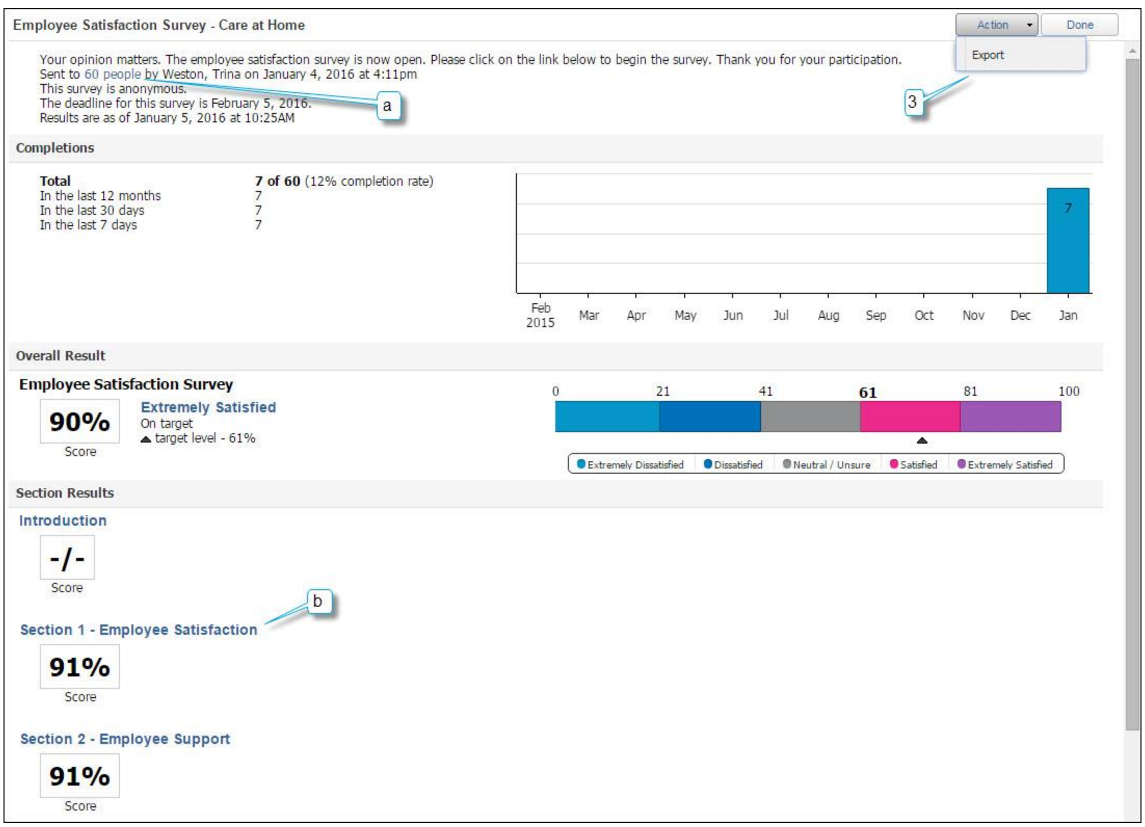
1. Select the **My Survey Campaigns** dashboard tool on the *Home* page.

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

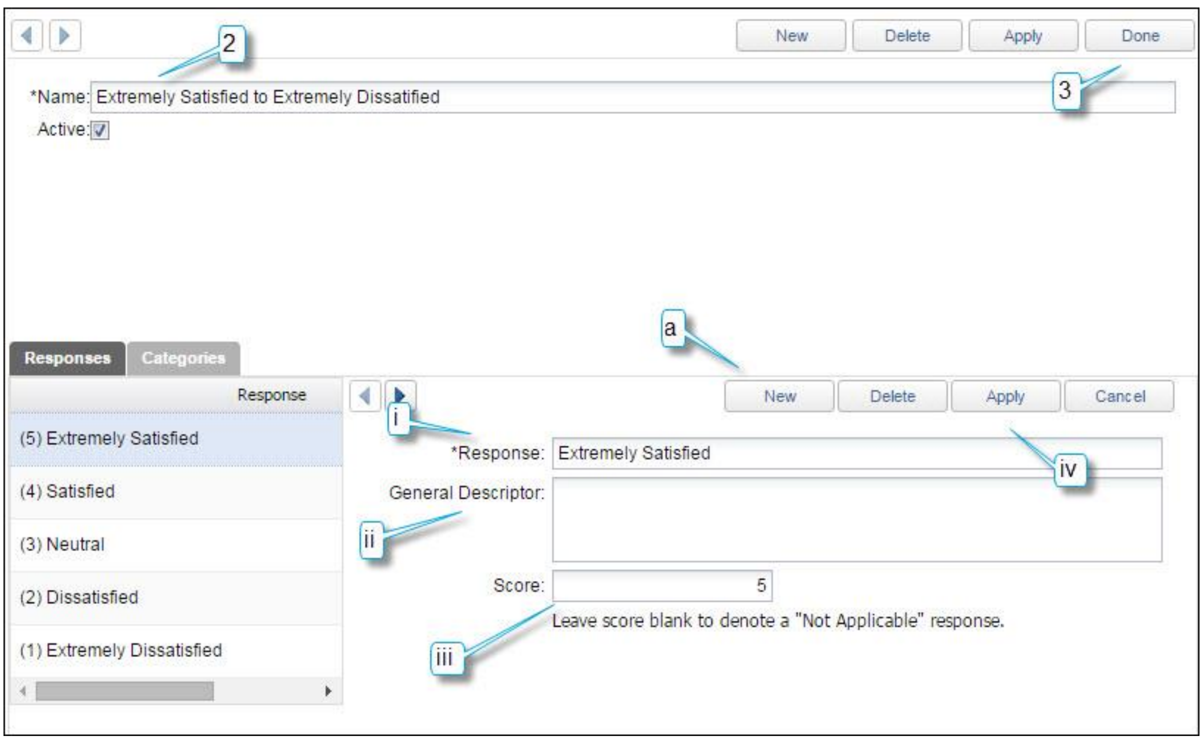
If all questions in your survey utilize the same subset of answers and values, it may be valuable to set up a set of Standard Reponses to use in your Survey Questionnaire.

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**.



Creating Display Values

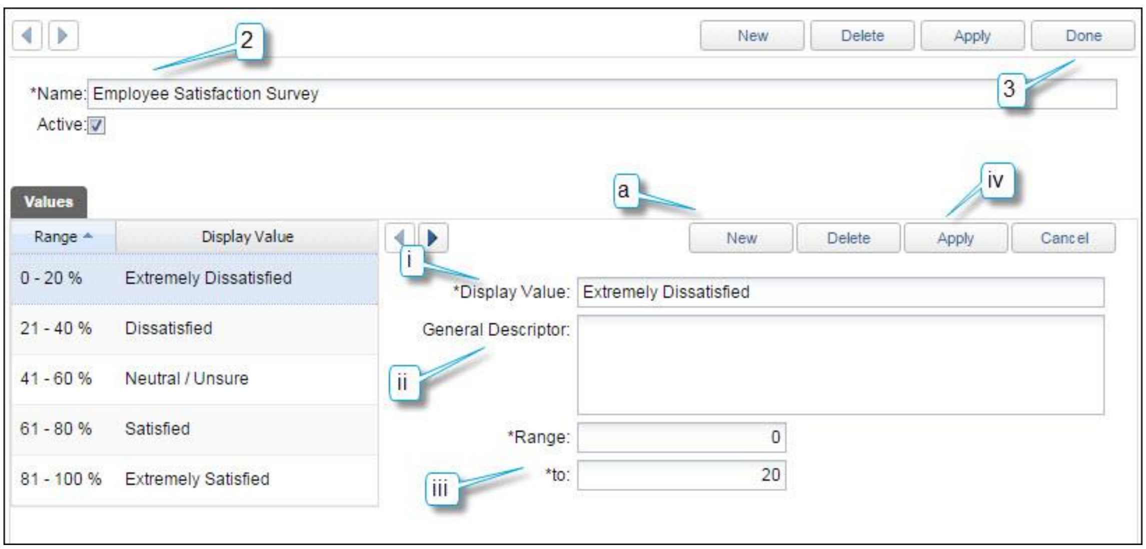
iTacit offers a few sample scales to determine the collective responses of your survey, such as a Satisfaction Survey and a Strongly Agree to Disagree scale. Additional value ranges may be created.

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**.



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).

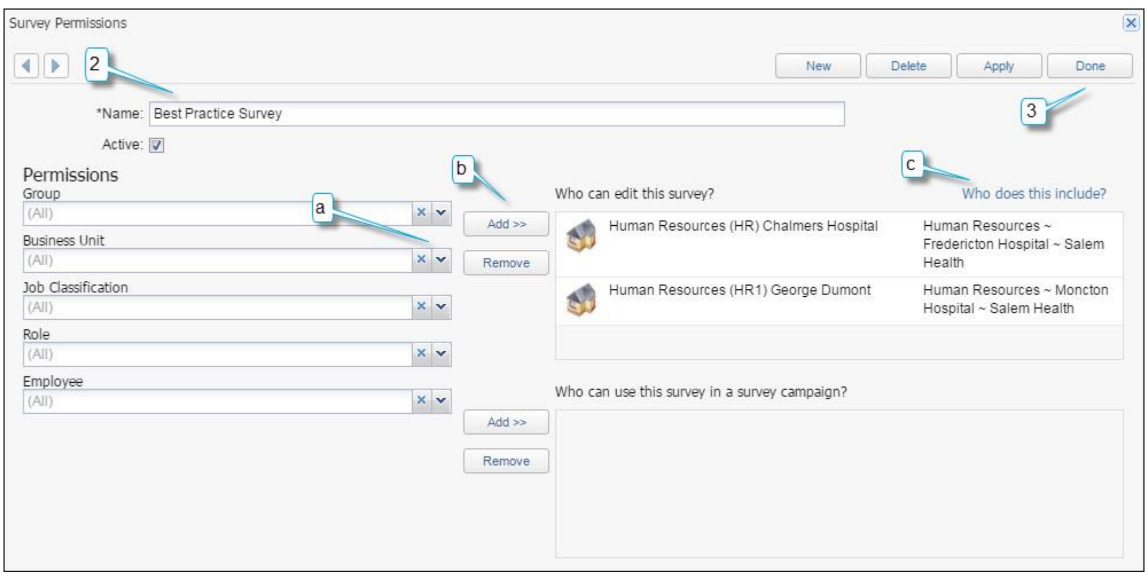
1. Select **Menu** > **Surveys** > **Survey Permissions**.

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**.



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**.