

# User Administration Guide

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## License

To activate your enterprise application, enter the **license key** on the License page.

This is a unique key which is provided along with other installation materials. When you log into the application for the first time you are automatically redirected to this page.

Home > License

**License Administration**

To request a new license key please contact Sales Support.  
Tel. 1(781) 849 8118. Email [sales@worldapp.com](mailto:sales@worldapp.com)

Please enter your license key below  
Enter correct license key here

Activate

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**Your current license status**

Number of Accounts:	Unlimited
Number of Sub-accounts:	Unlimited
Credits Available:	Unlimited
URLs Available:	Unlimited
Expiration Date:	Dec 31, 2015

**WorldAPP**

Enter your license key and click the **Activate** button. If your license key is accepted, the current license status will be updated on the right side of page.

Current users can request license upgrade or extension from their account representatives. To update the license key click the **license** link at the very top of an administration account, and repeat the steps mentioned above.

## Add New Account

New user accounts can be created directly from your administration account.

- Click the **Add New** button.
- Enter user's details in the pop-up window and click Sign Up.

- An account will be created once the registration form is filled out. The user should receive a registration confirmation email with login credentials.
- Go back to your administration account and search for this newly created user. You can change the user's settings if necessary from the administration > user edit page. For example, you can turn a single user into multi-user or multi-access account there.

Sub-accounts for [Multi-User](#) and [Multi-Access](#) accounts should be created within these accounts by account holders themselves.

## User Account Administration

The Administration account allows you to search, edit user accounts, change the account type, expiration date, add or withdraw credits.

The administrator account login details are provided along with the other installation materials and can be received from the Form.com/Key Survey account coordinator or from your company production group who installed the application.

### Searching for User Accounts

- Access the **User Search Screen** by logging into administration account.

- All the **User Property Fields** are searchable. Enter user data into any field to locate the user account you wish to edit. See the table below for descriptions of each user property field.

Properties	Description
User ID	The unique number of the user in the system.
Email	The email address of the user.
Login	The user login name.
Survey ID	The unique number of the user survey.
First Name	The user's first name.
Last Name	The user's last name specified in the account.
Company	The company name specified in the user account.
Phone	The phone number specified in the user account.
City, Country	The residence information.
Type	The dropdown box allows you to select the user type: - Any; - Single User; - MultiUser Admin; - WebPoll; - Plan Template; - Multi-Access; - SubUser.
Sign Up	The <b>Sign Up</b> field. The sampling includes those accounts with the Sign Up dates limited to the range specified in the <b>From</b> and <b>To</b> fields.
Expiration	The <b>Expiration</b> field. The sampling includes those accounts with the Expiration dates limited to the range specified in the <b>From</b> and <b>To</b> fields.
Credits	The quantity of the remaining user credits. The sampling includes accounts with credits more or equal to the number specified in the <b>From</b> field and less or equal to the number specified in the <b>To</b> field.
Status	The dropdown box allows you to filter accounts by the following status: <b>Any, Active, Locked</b> .

Use the **Show items per page** dropdown box to indicate the desired number of returned records per page in the search results.

- Click **Search** to begin the user account search.
- Click **Clear** to clear the data out of all fields.
- Search results are returned and display the associated properties for all users that match the search criteria.
- If the user account is a sub-account, the unique ID number of the master account displays in the **Master ID** column. This number is hyperlinked and clicking it allows you to enter the application through the master account login.

Search results							
UserID	Login	Company	Expire	Credits	MasterID	Sign Up	Del
65071	<a href="mailto:william.harris@wordapp.com">william.harris@wordapp.com</a>	Worldapp	Feb 8, 2013	10000		Feb 9, 2012	
(1 total)							

### Important Tips

Keep the following things in mind when entering search criteria:

- If you type 'partial data' into a search field, all results that contain that data excerpt (in that specific field) are returned. This is true on all search fields excluding the **Survey ID** field.

### Example

- If you enter "yahoo" in the **Login** field, all user accounts containing this domain name in their logins are returned in the search results.
- If you enter the number in the **Survey ID** field, only the user account tied to this survey is returned.
- If you leave all the fields blank, the entire list of user accounts is returned in the search results.

## Editing User Accounts

1. Once you have located the user record you wish to edit, click the **User ID** link to open the user record.

Search results							
UserID	Login	Company	Expire	Credits	MasterID	Sign Up	Del
<a href="#">65071</a>	<a href="mailto:william.harris@wordapp.com">william.harris@wordapp.com</a>	Worldapp	Feb 8, 2013	10000		Feb 9, 2012	
(1 total)							

2. Within the user record, you can edit the **Login**, account expiration dates, credits and **User Type**.

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**Account info**

This account is active [Lock Account](#)

User ID **65071**

Login

Require password change at first login

Registration 2012-02-09 12:14:57.11

Login expire

[Reset Password](#)

[Show Rights](#) [Usage Report](#)

Credits 10000

Add/Remove credits

Sessions 1

URL Suffix

User type: Single User

Application: SURVEY

Name: Harris William

Company: Worldapp

Phone: (781) 849-8118

Email: william.harris@wordapp.com

[Save](#)
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3. Account password can be changed from that particular account by users themselves from the **My Account** page. It can be also reset by clicking the **Reset Password** button when editing user account, thus the notification email with a temporary password will be automatically sent to the email address associated with this account.
4. Use the Back and Next buttons to browse through all accounts in your workgroup.

Properties	Notes
Login	Must be unique record throughout the system.
Login Expire	The date must follow the year-month-day standard. Eg. 2004-05-23.
Add/Remove Credits	You can add or remove credits by placing the amount to add or remove in this field. A negative amount will remove credits.
URL Suffix	You can enter a suffix that will be used in all survey links of this account.
User Type	Use this dropdown box to set the user type. Sub-accounts for Multi-User and Multi-Access accounts should be created within these accounts by account holders themselves.
UserType	Description

Single User	Users can design, edit and distribute surveys and forms, view reports.
Multi-User Account	Users can work on their surveys and forms and also manage other single user accounts (sub-accounts).
Multi-Access Account	Users can work on their surveys and forms, create and manage sub-logins (sub-accounts) to their accounts. An owner of the multi-access account can manage access levels for each sub-login or a group of sub-logins.
Sub-accounts	Shows number of sub-accounts for Multi-User and Multi-Access.

- Click the **Show Rights** button to display all of the features which can be activated for the account. Click the **Hide Rights** button to collapse the list.
- Activate and deactivate the features by clicking on the corresponding check boxes.

Survey Design	Survey Launch	Survey Report	Import/Export Data (Integrability)
<input checked="" type="checkbox"/> Add Footer	<input type="checkbox"/> AddressBook	<input checked="" type="checkbox"/> Crosstab/Group Chart	<input checked="" type="checkbox"/> Enable API
<input checked="" type="checkbox"/> AdvancedLogic	<input checked="" type="checkbox"/> Alias	<input checked="" type="checkbox"/> Click Through	<input checked="" type="checkbox"/> Export to XML
<input checked="" type="checkbox"/> BackButtRem	<input checked="" type="checkbox"/> Anonymous	<input checked="" type="checkbox"/> Crosstab	<input checked="" type="checkbox"/> Export unique survey URL
<input checked="" type="checkbox"/> BranchOnRange	<input checked="" type="checkbox"/> AttachFile	<input checked="" type="checkbox"/> EditResponses	<input checked="" type="checkbox"/> ImportRespondentData
<input checked="" type="checkbox"/> CustPalette	<input checked="" type="checkbox"/> Autofill	<input checked="" type="checkbox"/> EmailReport	<input checked="" type="checkbox"/> Report to PDF
<input checked="" type="checkbox"/> CustRankScale	<input checked="" type="checkbox"/> BulkEmail	<input checked="" type="checkbox"/> Formula in text and images in reports	<input checked="" type="checkbox"/> PDFSurvey
<input checked="" type="checkbox"/> CustTextFormat	<input checked="" type="checkbox"/> CustDomainName	<input checked="" type="checkbox"/> RemoteFilter	<input checked="" type="checkbox"/> Export to SPSS
<input checked="" type="checkbox"/> EducationPackage	<input checked="" type="checkbox"/> DuplicateEmails	<input checked="" type="checkbox"/> Filtering uses wildcard	<input type="checkbox"/> Open In WorldAPP Analytics
<input checked="" type="checkbox"/> Image Align L/R	<input type="checkbox"/> EmailLimit	<input checked="" type="checkbox"/> Filtering uses regex	<input type="checkbox"/> Unlimited PDF
<input checked="" type="checkbox"/> Language	<input checked="" type="checkbox"/> EmailReminder	<input checked="" type="checkbox"/> Filtering uses fulltext	<input type="checkbox"/> Correct XML Scales (from 1)
<input checked="" type="checkbox"/> One Touch Script	<input type="checkbox"/> Heavy launch	<input checked="" type="checkbox"/> Links answers	<input checked="" type="checkbox"/> Unique export plugins
<input checked="" type="checkbox"/> Preferred Matrix	<input checked="" type="checkbox"/> Manage bounces	<input checked="" type="checkbox"/> Private Notes	<input checked="" type="checkbox"/> FTP Upload
<input checked="" type="checkbox"/> Preferred answer	<input type="checkbox"/> Panel filter	<input checked="" type="checkbox"/> Question analysis code	<input checked="" type="checkbox"/> EvoPDF export
<input checked="" type="checkbox"/> Profile	<input checked="" type="checkbox"/> Password-Survey	<input checked="" type="checkbox"/> Filtering	<input checked="" type="checkbox"/> EvoPDF report export
<input checked="" type="checkbox"/> RandAnswer	<input checked="" type="checkbox"/> Redirect	<input checked="" type="checkbox"/> ReportExpandText	
<input checked="" type="checkbox"/> RandQuestion	<input type="checkbox"/> ReplyTo	<input checked="" type="checkbox"/> Report logo	
<input checked="" type="checkbox"/> RegularExpressions	<input checked="" type="checkbox"/> SecureConnection	<input checked="" type="checkbox"/> Response rate	<input checked="" type="checkbox"/> LogoFree
<input checked="" type="checkbox"/> WorkFlow	<input type="checkbox"/> URLAppend	<input checked="" type="checkbox"/> Significance	<input type="checkbox"/> Navigation dropdown
<input checked="" type="checkbox"/> 3DMatrix	<input checked="" type="checkbox"/> GateKeeper	<input checked="" type="checkbox"/> Share calculation	<input type="checkbox"/> Paid
<input type="checkbox"/> Copy survey with results	<input checked="" type="checkbox"/> Participant portal	<input type="checkbox"/> Sort respondents by start date	<input checked="" type="checkbox"/> Salesforce integration
<input type="checkbox"/> Copy survey with reports	<input type="checkbox"/> Block emails	<input checked="" type="checkbox"/> Statistics	<input type="checkbox"/> BlockExpirationEmails
<input checked="" type="checkbox"/> Answer Layout	<input type="checkbox"/> Disable email security	<input checked="" type="checkbox"/> TimeSeries	<input type="checkbox"/> BlockRegistrationEmails
<input checked="" type="checkbox"/> Custom survey buttons		<input checked="" type="checkbox"/> XXX in Report	<input checked="" type="checkbox"/> Enable E-Forms
<input checked="" type="checkbox"/> Image Position		<input checked="" type="checkbox"/> Response history	<input type="checkbox"/> Salesforce APEX
<input checked="" type="checkbox"/> Show Results			<input type="checkbox"/> Dashboard
<input checked="" type="checkbox"/> Advanced Show/Hide			<input type="checkbox"/> Dashboard Add/Edit
<input checked="" type="checkbox"/> Common Plugins			<input checked="" type="checkbox"/> Live Chat
<input checked="" type="checkbox"/> Enterprise Plugins			<input checked="" type="checkbox"/> Contact Manager
<input checked="" type="checkbox"/> Custom plugins			<input type="checkbox"/> Survey 360
<input checked="" type="checkbox"/> Search			<input checked="" type="checkbox"/> Concurrency Block
<input checked="" type="checkbox"/> Import from file			<input type="checkbox"/> Survey Metadata
<input checked="" type="checkbox"/> Custom JavaScript			<input type="checkbox"/> Section 508 Support
<input type="checkbox"/> Survey without table			<input type="checkbox"/> Unlimited contacts
			<input type="checkbox"/> Portal Single Sign On
			<input checked="" type="checkbox"/> Audit Log
			<input checked="" type="checkbox"/> Custom data models
			<input checked="" type="checkbox"/> Offline
			<input checked="" type="checkbox"/> Linear Form
			<input checked="" type="checkbox"/> Tasks
			<input type="checkbox"/> Custom portal
			<input checked="" type="checkbox"/> New portal
			<input checked="" type="checkbox"/> CM Status update
			<input type="checkbox"/> Disable item scripts
			<input checked="" type="checkbox"/> Admin Option

## Copy Surveys Between the Accounts

- Click the **Show Details** button to display the feature that allows you to copy Forms/Surveys from other accounts, remove Forms/Surveys or restore previously deleted Forms/Surveys. Click the **Hide Details** button to hide this feature.

**Cloning**

Select survey  Type UserId

Deleted on	Survey Name	Credits	Restore	Remove
Deleted without credits	2006 Polytron Performance Appraisal Evaluations Cloned by Admin	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	1	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	Cell Site Installation and Maintenance Audit Final Cloned by Admin	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	Technical Skills Sample Survey	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	NoNAME	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	Inactive Client Form Cloned by Admin	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>
Deleted without credits	2006 Internal Client Services Survey	0	<input type="button" value="Restore"/>	<input type="button" value="X"/>

Please note, that the Show details button is displayed only if support access is granted for account where the survey is stored.

- From the **Select Survey** dropdown box select the Form/Survey you wish to copy.
- Enter the **User ID** of the account which the Form/Survey will be copied to.
- Click the **Restore** button, to restore previously deleted Forms/Surveys from that account.
- Click the **Remove** button to completely remove a Form/Survey from the account.
- Once you have finished editing, click **Save** to apply changes.

## Features

This is a list of features, their descriptions and where in the form/survey application these features are used.

Feature	Description	Used In
3D Matrix	Allows the user to create the <b>3D Matrix</b> question type.	Edit Questions
Add Footer	Allows the user to add a header and footer to a Survey.	Survey Header Survey Footer
AddressBook	Allows the users to create an address book. This feature is useful for sending out surveys to email distribution lists.	Address Book Email Survey Using Address Book
Advanced Logic	This option activates <b>Advanced Logic</b> which is used to make flexible survey structures.	Edit Question Logic
Advanced Show/Hide	This feature allows showing or hiding answer choices based on the specified condition.	Edit Questions
Alias	Allows the user to customize the 'From' email address for the launch, reminder and report emails.	Compose Email
Anonymous	Allows the user to perform anonymous survey distribution.	Survey Launch Email Survey
Answer Layout	Allows selecting the answer layout vertically (down) or horizontally (across) when adding or editing the specific multi-choice question.	Optional Features

Attach File	Allows attaching files and emailing their link to the survey/report or survey/report itself to the respondents.	Compose Email
Audit Log	Allows to download audit log from the My account page. Audit Log is an Excel spreadsheet containing the information about the activity within account for the last 30 days	My Account
Autofill	Allows importing additional respondent information along with their email addresses. This enables the option to pre-populate question responses (fill in responses automatically). It is available if the 'Bulk Email' feature has been activated.	Format Data File
BackButtonRem	Allows removing the <b>Back</b> button from the survey page.	Survey Rules
Block Emails	When this right is activated, and user tries to launch the form/survey or send a report via e-mail, he or she will see the pop-up message with the following text: "Due to the spammers abusing our system, we have implemented Phone Verification process. Please check the form below to make sure that your correct phone number is indicated. Our support will contact you promptly. " Users will be asked to enter their phone number and after they submit the form, WorldAPP support will receive Launch confirmation e-mail with users' details and contact user directly.	Emails
Block ExpirationEmails	When active, this right allows to block sending account expiration emails.	Expiration emails
Block RegistrationEmails	When active, this right allows to block sending account registration emails.	Registration emails
BranchOnRange	When active, this feature provides the functionality of the next question being dependant on the points scored by the respondent to the previous questions.	Branch on Range Logic
BulkEmail	Allows importing a complete database of email addresses that is stored locally on the computer. The corresponding Form/Survey can also be emailed to everyone in this database at the same time.	Email To List
Click Through	Allows the display of how many respondents accessed your Form/Survey as well as the Click-through count if responses have not been completed .	Forms /Surveys Home
CM status update	If the Contact Manager is used for Panel Management, each time respondents access voting or an email is sent to the user the data in the contact a manager is updated. Such as is this user active? Have they opted out? What's their current panelist score, etc. These updates create a load on the system. When activated, this right disables this functionality if users are not using the CM for Panel Management.	Panel management
Common Plugins	Enables common plugins for the user account.	Plugins
Concurrency Block	When activated, this right allows to work within the same account in different sessions(browsers, computers, etc.)	Account administration
Contact Manager	Activates Contact Manager for the user account.	Contact Manager
Copy Surveys with Reports	Allows to copy surveys with reports when designing survey by editing an existing survey with the help of "Copy with Reports" check box on the Design Survey page.	Design Survey
Copy Surveys with Results	Allows to copy surveys with results when designing survey by editing an existing survey with the help of "Copy with Results" check box on the Design Survey page.	Design Survey
Correct XML Scales	By default values for the XML export start from 0. If enable this feature values will start from 1.	XML Export
Crosstab /Group Chart	Allows creating Cross Tables and Group charts in reports.	Report

CustDomain Name	Allows modifying the domain name in survey or report URL.	Launch Survey
Custom JavaScript	Allows to use JavaScript in the form/survey to customize its functionality.	Form /survey customization
CustPalette	Allows to changing the survey layout manually if none of the predefined color schemes are suitable with the help of Custom Colors Layout editor.	Layout
Custom Plugins	Enables custom plugins for user account.	Plugins
Custom Survey Buttons	Allows uploading your own survey buttons (Next, Back and Submit) from the Layout page.	Layout
CustRankScale	Allows creating custom rank scales as well as edit or delete any of them.	Rate Items, 3D Matrix
CustTextFormat	Allows customizing the formats which can be used by the respondent while answering questions with a pre-format option.	Customize text format
Dashboard	Use this feature to activate custom dashboard within the account for QlickView reporting.	Dashboard
Dashboard Add /Edit	This feature allows adding custom tabs to the default dashboard.	Dashboard
Disable item script	For the users that have this right disabled, the system should strip out all 'script' tags from any survey/form element	Form /survey customization
Disable emails security	When this right is enabled, emails sent from this Account will not be signed with DKIM signature and will be sent through the second queue for not signed emails via SMTP for not signed emails.	Survey Launch Emails sending
DuplicateEmails	This feature allows the sending of email invitations (during bulk distribution), to respondents with the same email addresses. This feature also assigns a unique code to each respondent (in the data file), so you can distinguish survey results and other attributes from the file for AutoFilling.	Email Survey To List Format Data File
EditResponses	Allows editing respondent data.	Report by respondent
EducationPackage	The education package feature allows the user to set a time limit for filling out surveys and provides a view of the total score for each respondent in the report, when the answers have been supplied with point values.	Launch Survey Branch on Range
EmailLimit	Sets a limit on the number of emails allowed to be sent from particular account.	Email
Email Reminder	This is an email that is sent to respondents whose email addresses are in the survey Incompletes list.	Email Reminder
Email Report	Allows to email the report or attach the report to an email.	Email Report



Enable E-forms	Enables custom forms for user account.	Email Report
Enable API	Enables API.	Administration Page
Enterprise Plugins	Enables high-level enterprise plugins for user account.	Survey Rules
Export Unique Survey URL	Allows exporting the unique survey URL of each respondent along with their results into Excel.	Export to Excel
Export to XML	Allows exporting your survey to XML by clicking the 'Export to XML' button on Survey Home page.	Survey Home
Export to SPSS	Allows exporting reports to SPSS.	Report export
Filtering	This feature allows the user to apply complex filtering to the report, such as filtering on text, email address, date, etc. The user can also specify which responses to display in the report results.	Advanced Filter
Filtering Uses Wildcard	This feature is used along with Filtering feature and widens its capabilities to using wildcard characters.	Advanced Filter
Filtering Uses RegExp	This feature is used along with Filtering feature and widens its capabilities by using regular expressions for filtering results.	Advanced Filter
Filtering uses fulltext	In addition to complex filtering enables fulltext option for advanced text filtering.	Advanced Filter
Formula in text and images in reports	This feature allows the user to create and insert formulas into the text of the report elements.	Text and images
FTP Upload	Exports the report to an FTP server automatically only once or on a scheduled regular basis.	Publish Report
Gatekeeper	Control over the launch of forms/surveys created within the sub-account.	Form /survey distribution
Heavy launch	If this check box is selected, the user account will be not checked up for heavy launch index by the system. The check box is not selected by default.	Form /survey distribution
Import Respondent Data	The import response feature allows the user to upload responses from a CSV file into a survey.	Launch Survey Upload Responses
Image Align L/R	Allows setting the alignment of the image (left, center, right) in top position and add arrows (Up Left, Bottom Left, Up Right, Bottom Right).	Add Image
Image Position	Allows positioning the image (left, top, right) relative to question text.	Add Image

Import from file	Allows designing a survey by importing a delimited data file.	Design New Survey
Language	Allows selecting the language for the pop-up alerts and to design a survey in different languages.	Survey Rules
Links Answers	Allows specifying the way the information about responses to specific questions will be displayed in the online report.	Report Rules
Linear Form	Allows to create linear forms within particular user account.	Form /survey creation
Live Chat	Activates LiveChat for participant account.	Support
LogoFree	Allows to remove the "Powered by KeySurvey" and "Powered by Form.com" logo from the form/survey and report pages.	
Manage Bounces	Enables the possibility to track the delivery of email messages from the Email Results page.	E-mail Results
Navigat ion Dropd own	Allows navigating through the account pages using the dropdown box.	Survey and Report Editing Pages
New Portal	Activates New Portal for particular account.	Form /Survey
One Touch Script	This feature navigates respondents to the next page, upon selecting one of the radio buttons.	Survey Rules
Open in World APP Analyti cs	Allows to synchronize <a href="#">Form.com/Key</a> Survey data with the WorldAPP Analytics Reporting tool	My Account Publish Report
Offline	When activated, allows CM users to access Offline portal and Mobile app	Mobile app
Paid	A flag that is set on the account after user's payment.	User administration
Panel Filter	Allows filtering the addresses according to the results of the selected surveys.	Address Book
Partici pant Portal	Activates Participant Portal within the account where users can fill out and submit all surveys intended for them or on behalf of other respondents.	Portal
Passw ord-Survey	Allows to protect the surveys with individual passwords.	Passwo rd Protecti on Format Data File
PDFS urvey	Allows to convert surveys to PDF format.	Surveys home
Portal Single Sign On	Allows to use Single sign on functionality for logging to the Participant portal.	Particip ant portal
Prefer red answer	Allows to use the 'Skip with alert' option. If respondents do not answer the question with the 'Skip with alert' option and submit the survey, they will be prompted to answer it but still they can skip it.	Survey Questio ns

PreferredMatrix	Allows to use the 'Compare one against another' question type.	Survey Questions
PrivateNotes	Allows the input of comments to the survey respondent results.	Edit Questions Summary Report
Profile	Allows designing profile surveys for Common-Password survey protection.	Common-Password Survey Edit Questions
Question Analysis Code	This feature is used for statistic analysis purposes	Optional Question Features
Random Answer	Allows displaying question answers in random order.	Edit Single Question
Random Question	Allows displaying the questions in random order.	Edit Questions
Redirect	Allows redirecting respondents to the necessary website after they have submitted the survey.	Survey Rules
Regular Expressions	Allows to use regular expressions to create custom formats.	Customize text format
Remote Filter	Allows a report viewer to add filters to the report online.	Report Rules Summary Report
Reply To	Allows filling in the fields for 'Reply' address and undelivered emails.	Compose Email
Report Expanded Text	Allows expanding text responses in the online report. It can be activated from the 'Customize Report' page.	Report Items Summary Report
Report Logo	Allows attaching a report logo.	Report Layout
Report to PDF	Allows to export summary report to PDF.	Report
Response History	When activated, allows to see the changes that the users were making to form responses along with the name/ID of the user and the time the change was made.	Responses collection
Response Rate	Allows showing the response rate % (which is total number of completed surveys multiplied by 100 and divided by total number of completed and incompletd surveys) in the 'Completed' column in parentheses.	Surveys home
Salesforce integration	Allows launching a survey through the Salesforce application.	Launch Survey

Salesforce APEX	Marker that this user has been created from Salesforce	User administration
Search	Allows searching surveys by survey name, title, introduction or survey ID.	Surveys home
Section 508 Support	Enables Section 508 support for user account.	Survey creation
SecureConnection	Allows securing all collected data by encrypting it.	Launch Survey
Share Calculation	Allows creating a table or graph to show results of share calculation in online report and PDF.	Share Calculation
Show Results	Gives the user an option of allowing respondents to view each others results.	Survey Rules
Significance	Allows creating a table or graph to show results of significance testing in an online report.	Significances
Sort respondents by start date	Allows sorting the reports by date the respondents started to take the survey.	Responses history
Survey 360	Allows to create 360 survey within user account.	Survey creation
Survey MetaData	Allows to use meta data for form/survey customization within user account.	Survey rules
Statistics	Allows applying statistical quantities to survey results.	Survey report
Tasks	Activates Task functionality for particular account.	Tasks
TimeSeries	This feature allows the user to add time series tables and graphs to the report.	Report Questions Time Series Graph
Unique Export Plugins	Enables unique Export Plugins for user account.	Survey Rules
Unlimited Contacts	Allows user to add unlimited number of contacts to the Contact Manager.	Contact Manager
Unlimited PDF	When activated, allows to export report to PDF even if they consist of more than 3000 pages.	Report
URL Append	URL ID append. This feature allows the user to apply a suffix to the survey URL.	Launch Survey URL Suffix
EvoPDF export	Uses EvoPDF technology for form/survey export to PDF.	Form /survey

EvoPDF report export	Uses EvoPDF technology for form/survey report export to PDF.	Report
XXX in Report	Allows to hide the results for questions with less than X responses. If there are less than X responses to a certain question they will be displayed as XXX in the <b>Summary Report</b> mode.	Report
Workflow	Allows receiving emails or sending them to the respondents or to any other email addresses when a particular response is selected.	Email Alert
Survey without table	Replace the "table" elements to the "div" in a survey CSS code.	Form /Survey

## Usage Report

As an administrator, you can track user's statistics and action data, such as the number of surveys created, number of credits used, number of responses per all surveys and others.

1. Search for a certain account to see the statistics report.
2. Click on the user ID hyperlinked number to open **Edit User Account** window.

Search results							
UserID	Login	Company	Expire	Credits	MasterID	Sign Up	Del
55071	<a href="mailto:william.harris@wordapp.com">william.harris@wordapp.com</a>	Worldapp	Feb 8, 2013	10000		Feb 9, 2012	
(1 total)							

3. Click the **Usage Report** button.
4. Set the **From** and **To** report dates to set the time interval to see the account statistics.
5. Select the option to group statistics records by and click the **Ok** button.

Usage Statistics Report					
	2011, 11	2011, 12	2012, 1	2012, 2	Total
Surveys created	2	3	5	1	11
Currently active	-	-	4	1	5
Currently inactive	2	3	1	-	6
Questions in surveys	7	19	11	1	38
Answer options in surveys	11	95	36	5	147
Avg. answer options per question	1.571	5	3.273	5	3.868
Number of respondents	11	9	11	-	31
Number of email invitations and uploaded passwords	-	-	-	-	0
Credits used	10	9	9	-	28
Space used in files	-	-	26 Kb	-	26 Kb
Approximate space used in Database	17 Kb	60 Kb	46 Kb	2 Kb	127 Kb

6. Data is grouped by the selected period and one more column that shows the total number per each record is added at the end of the table.
7. Click the **Export to Excel** button to export the data to **Excel** and analyze it externally.

## Security Setup

On the Security Setup page, you can set up the security regulations and manage the password settings for all account types. Using this administration resource, you can adjust the security policy of the account access, reset the passwords, deactivate and reactivate the accounts. To access the security settings you need to log in the administration account and click the Passwords button.

Home > Passwords

- Select account type**
  - User Accounts
  - Admin Accounts
- User passwords expire in**
  - Never expires
  - Expires in  days
- Enforce password history**
  - Is not logged
  - Remember  passwords
- Password complexity requirement**
  - Alpha characters (any case)
  - Uppercase and lowercase alpha characters
  - Digits
  - Non-alphanumeric characters
- Minimum password length**
  - Not limited
  - At least  characters
- Account expiration requirement**
  - Never expires
  - Expires if idle for  days
- Account lockout policy**
  - Do not lock accounts
  - Lock accounts for  minutes after  invalid attempts

This page provides the possible security settings:

- User passwords expire in** Allows you to manage the password validity term.  
The supported options are:
  - Never Expires (by default);
  - Expires in .. days (The value must be between 0 and 365).
- Enforce password history** Enables you to determine the number of unique new passwords that have to be associated with a user account before an old password can be reused.  
The possible options are:
  - Is not logged (by default);
- Password complexity requirement** This security setting requires the password to meet the complexity requirements.  
The possible options are:
  - Alpha characters (any case)

- Uppercase and lowercase alpha characters
  - Digits
  - Non-alphanumeric characters.
- To satisfy the needed complexity level these options can be combined.
4. **Minimum password length.** Enables you to set the minimum password length.  
The supported options are:
    - Not Limited (by default);
    - At least N characters (The value must be between 0 and 16).
  5. **Account expiration requirement.** Allows you to limit the term the account can stay idle.  
The possible options are:
    - Never expires (by default);
    - Expires if idle for N days (The value must be between 0 and 365).
  6. **Account lockout policy.** This setting disables a user account if an incorrect password is entered a specified number of times over a specified period.  
You may set the following option:
    - Do not lock accounts (by default);
    - Lock accounts for N minutes after N invalid attempts (The value must be more than 0 for minutes and between 1 and 10 for attempts).

Password complexity settings can be configured for:



- Self Hosted accounts
- Private Labels
- Branded accounts with Enterprise admin. Enterprise admin is an option in Branded account setup
- SaaS users and Branded accounts without Enterprise admin will have the same Password Complexity settings, set up in Key Survey admin account.

## Template Account

Template account is a system account that is used to create and store survey and question templates, as well as custom themes. Later they can be used in regular and workgroup accounts by regular users.

The default template account name that goes with your installation is "**template**".

When you log in to the template account you will see the list of folders that contain default template surveys, CSS templates and question library available for your regular users.

## Creating Survey and Question Templates

Survey templates are available for all accounts within your environment and are used for quick survey creation. They are divided into categories and contain list of commonly asked questions depending on the category they belong to. Users that create new survey using templates can then customize newly created surveys within their personal accounts by adding new questions, deleting or editing predefined questions.

To add new survey template:

1. Click the **New Survey** button from the Surveys home page of the template account.
2. Select the **'From Scratch'** option to create survey template by adding questions manually.
3. Select the **'Use a Template'** option to create survey template by customizing existing template.
4. Give unique name to your survey template.

The Survey name will be displayed to the other users when they create survey from templates

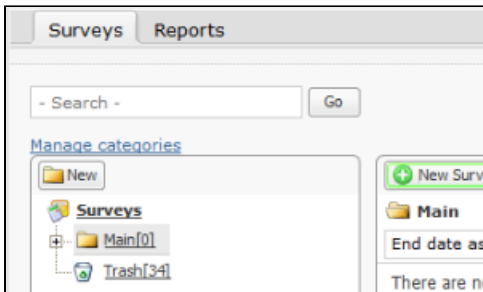
5. Select the category you want to create survey for. Use the **Templates** section to add survey template or section to add current survey questions to the library for public use.

6. Click the **Save** button.
7. Add as many questions to your survey as you need and proceed with other survey design procedures if necessary. Now your survey template or questions from the **Question Library** are available for all users.

## Template Management

By default all template surveys and questions from the **Question Library** are organized within different categories. On the *Template Management* page you can customize these categories or add new ones.

1. Click the **Manage Categories** link at the left top of the template account *Surveys/Forms* home page.



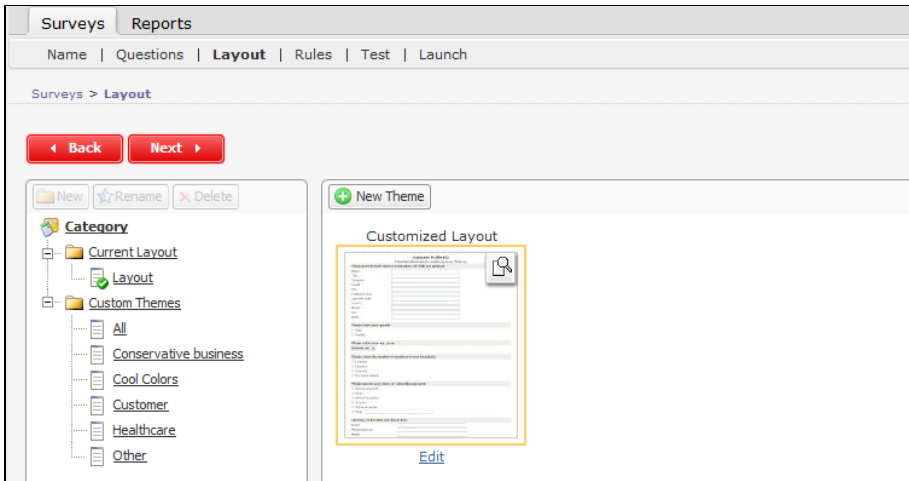
2. If your installation is an **Form.com** application, use the **Forms Templates** and **Form Library** options to customize the categories. Otherwise use the **Templates** and **Question Library** options.
3. Select the category you want to edit and click the Edit Category button.
4. Edit category name and assign group where this category should reside. You can also number category by typing its number. The check box available next to the numbering field shows or hides the category from the templates list.
5. Click the **Save** button to apply changes.
6. Go back to customize other template account properties.

## CSS Templates

Along with the survey and question templates you can create **CSS templates**(themes). They can later be used by regular users to improve survey design and appearance from the *Layout* page.

1. Create new survey from scratch or use available template. Follow the default survey design steps.
2. Go to the survey *Layout* page.





3. Select the **Custom Themes** category from the **Category** pane in the left and click the **Rename** button to customize existing categories.
4. Click the **New** button to create new custom category.
5. Click the **New Theme** button to add new theme template.
6. When this is done, regular users will be able to use CSS templates and apply them to their surveys within just a few steps.