

Snap Surveys: How to create an HTML survey with a custom login link and/or personalized e-mail invitation

Set up your respondent file:

1. Create your respondent file in Excel. Be sure to include at least one attribute that uniquely identifies each individual (such as NetID or Texas State ID), and a full email address.

Set up your survey using Snap Professional (on your PC):

1. Create a new survey (Open Snap Professional, Click on + at top left corner. In the Survey Details box, name your survey (must start with “sn”, use no special characters, only numbers, letters and spaces), provide a title, and select WEB and HTML in the publication medium section.
2. Set up your survey with all questions, images, etc. Apply any necessary routing rules.
3. Open the Data Entry window and select FILE | DATABASE LINK.
 - a. Click NEW.
 - b. Select EMAIL INVITES and click NEXT.
 - c. Click SELECT DATABASE FILE and browse to respondent file. Open it. Click NEXT.
 - d. Confirm that the correct Excel worksheet name is appearing in the “select table to use” dropdown box, then click NEXT.
 - e. In “Location of Published Survey”, enter URL of survey (<https://snap.txstate.edu/surveys/yourNetIdsurveyfilename/surveyfilename.htm>; *for example, <https://snap.txstate.edu/surveys/ab01mysurvey/ab01mysurvey.htm>*).
 - f. In “Email address field”, select field in distribution list that contains the email addresses.
 - g. Enter email subject and text of the message. At the appropriate place in the message text, click the INSERT box and select SURVEY LOCATION from the dropdown list to insert the survey location that you specified earlier.
 - i. If desired, you can use this INSERT button to include other variables in the message text (Dear NAME, for example).
 - ii. Set up any reminder messages by clicking the REMINDER tab and following the same process.
 - h. Select one of the Respondents options (see p. 242 in user manual for definitions). Click NEXT.
 - i. The next window allows for a test message to be sent. If you want to send a test message, enter the information to be used for the test message, and click NEXT. If not, just click NEXT.
 - j. Click FINISH.
 - k. Click CLOSE.

4. Open the survey in design mode. Select FILE | PUBLISH.
 - a. In the dialogue box, click the REPLIES icon in the left-hand list.
 - i. In the Responses section, be sure Email Replies is checked. Specify the email address to which responses should be sent.
 - ii. In the Web Page After Submitting section, enter URL (such as <http://www.txstate.edu>).
 - b. Click the BUTTONS icon in the left-hand list.
 - i. Select the buttons you need and click USE IN SURVEY box.
 - ii. Click SCHEME button.
 1. In drop down box at top, change SCHEME from text to IMAGES.
 - c. Click the PARADATA icon in the left-hand list.
 - i. Select RESPONDENT from the list of variables, and click the USE IN SURVEY box.
 - d. Click PUBLISH. Review survey preview for any problems, then close it.
5. In survey design view, highlight the respondent question (or other identifying variable) at the top, right click and choose HIDE VARIABLE.
6. Select FILE | PUBLISH and re-publish the survey again, checking to make sure the respondent or login box no longer appears at the top of the survey.
7. SAVE and CLOSE the survey.

Loading survey onto web:

1. Map a drive to **\\snap\Snap 10 Server\uploads**.
 - a. Right click on My Computer icon on PC's Desktop or Start Menu
 - b. Click on Map Network Drive
 - c. Select a drive letter (or use default)
 - d. In the Folder box, type "**\\snap\Snap 10 Server\uploads**" (without parentheses)
2. In the uploads folder, create a new folder with your NetID and survey name (example: **ab01surveyfilename**).
3. Find the Snap files saved on your PC. Open the appropriate survey folder, then open the Web HTML folder.
4. Copy the contents of the Web HTML folder to the new folder in the upload area of the Snap server.
5. Your survey will automatically be moved into the survey production area within 5 minutes. The URL will be **<https://snap.txstate.edu/surveys/NetIDyoursnapfilename/NetIDyoursnapfilename.htm>**; for example, **<https://snap.txstate.edu/surveys/ab01mysurvey/ab01mysurvey.htm>**.

NOTE: Any changes you make to the files in the SURVEYS folder will be mirrored in the production area, including deletion of files.

Distribute e-mail messages to invite survey participation:

1. Open Snap Professional on your PC.
2. Open your survey.
3. Switch to Data Entry mode.
4. Select FILE | DATABASE LINK.
5. Select the link that includes your emails and click RUN.
6. Click LOAD DATA to load the data from your database file.
7. Click either SEND TEST INVITE to test your message using the respondent you set up as a tester earlier, or SEND INVITES to send the emails to your actual respondents.

Retrieving e-mailed survey responses:

1. Open Snap Professional on your PC.
2. Open your survey.
3. Switch to Data Entry mode.
4. Select FILE | IMPORT.
5. Change format to MAIL format. Click OK.
6. Snap Professional will scan your e-mail inbox and download all responses. (NOTE: messages must be unread to be downloaded. If you have opened one or more, be sure to mark them as unread before running the import process in Snap.)