



A QUICK START REFERENCE GUIDE  
FOR WORKING WITH SURVEYS,  
CONTACTS AND MESSAGES

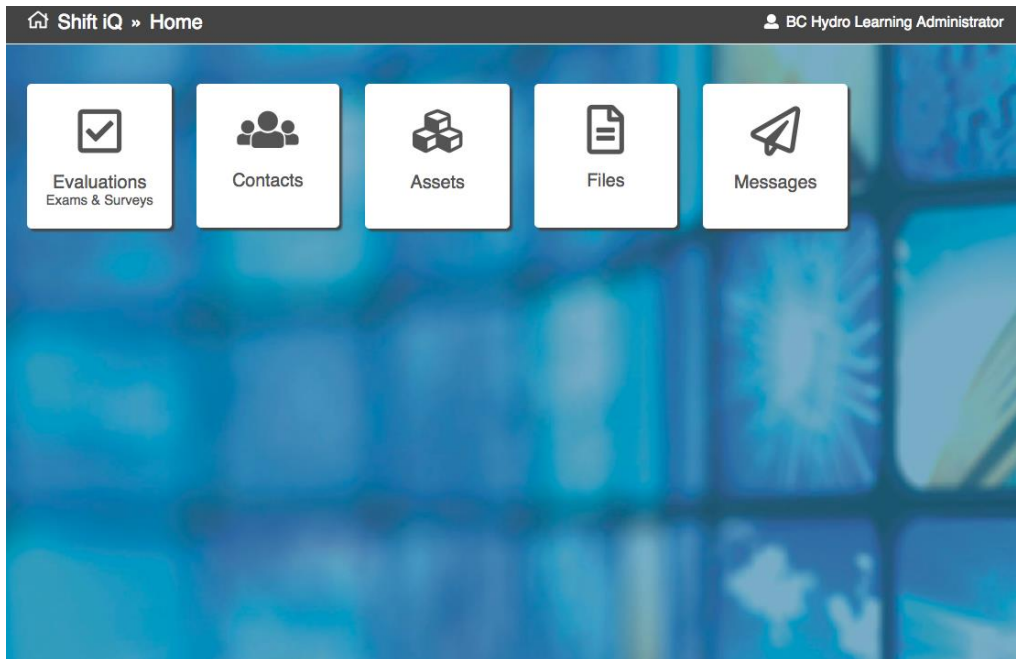
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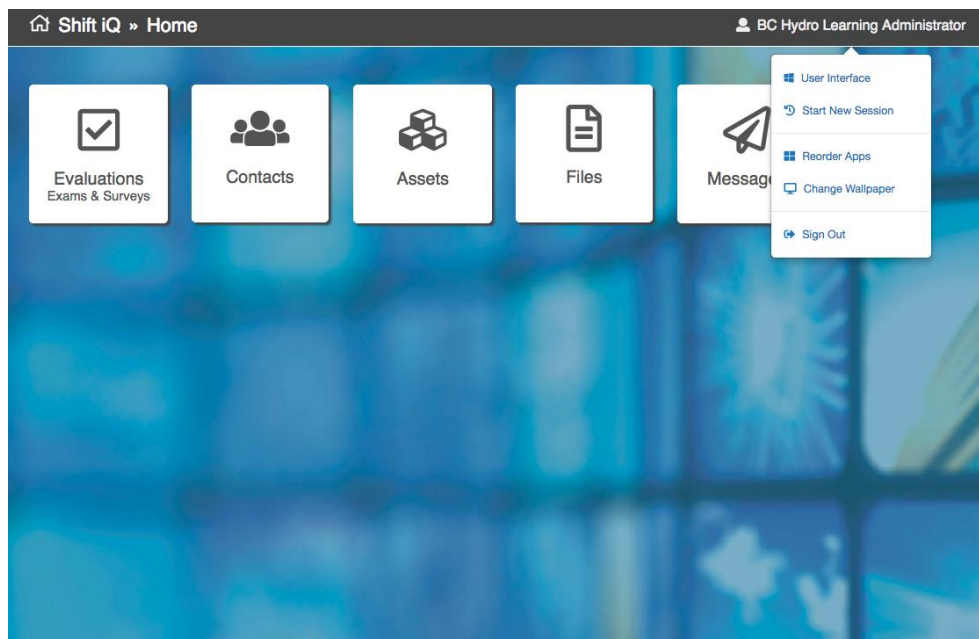
## Part 1: The Home Screen

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The Home Screen contains different apps that enable you to **build** and **distribute** assessments, surveys, exams, and learning plans.







Clicking on your name in the top right corner will enable you to manage your account, update your password, reorder apps on your Home Screen and change your wallpaper.






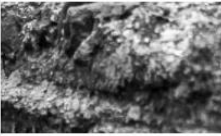





You can drag and drop apps and select a background image to personalize your Home Screen.

Reorder Tiles ✕

- Evaluations  
Exams & Surveys
-  Contacts
-  Assets
-  Files
-  Messages

[Save](#) [Cancel](#)

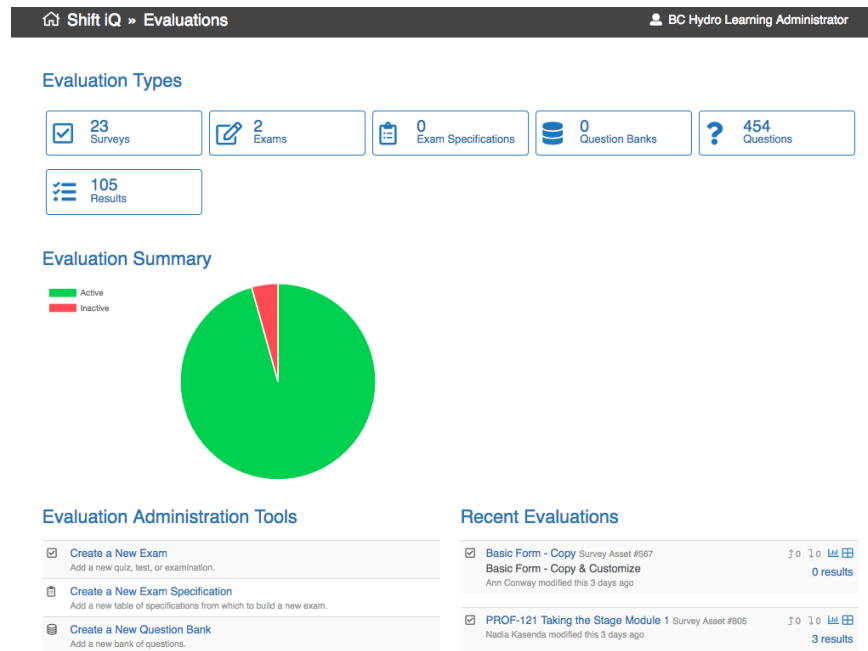
Change Wallpaper ✕

-   
Blossoms
-   
Breeze
-   
Butterfly
-   
Chess
-   
Construction-2
-   
Construction-3
-   
Construction
-   
Daisies
-   
Default

## Part 2: Evaluations, Exams & Surveys

Clicking on the Evaluations app will launch a dashboard containing all the tools and information you need to **build** and **distribute** assessments, surveys, and exams.

Counters at the top of the dashboard act as shortcuts to specific evaluation types, and the charts and graphs indicate the status of the various evaluations in your account.



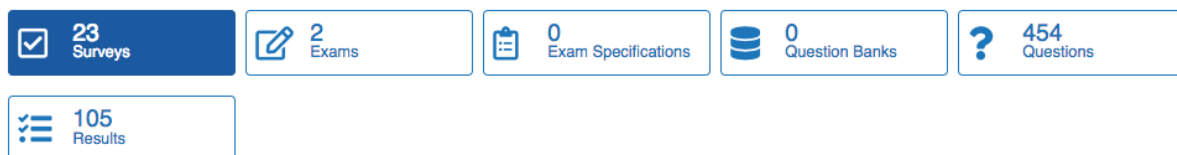
Below the summary charts and graphs, you can quickly launch tools to create new: surveys, exams, question banks and more.

A summary of recent evaluations is also included to find, or analyze, recent work.

### 2.1 Evaluation, Survey and Exam Counters

Counters display the number of evaluations by type and act as short cuts to enable you to: **search**, **find**, **view**, **create** and **edit** your evaluations, exams, and surveys.

#### Evaluation Types



Clicking on the survey counter will launch a page containing all your surveys. From here, you can use the fields in the **Search** menu to search for specific surveys; the **Action** menu to execute specific tasks, or; click the **New** button to create a new survey.

**Surveys** » 23 search results

Internal Name	Pages	Questions	Fields	Options	Branches	Conditions	Messages	Invites	Starts	Completes	Click Rate	Response Rate	
Basic Form - Copy	4	14	23	72	0	0	4	0	0	0	0 %	0 %	
CPC-NET-100	5	11	20	70	0	0	5	0	4	4	0 %	0 %	
L1SWO	1	9	9	40	0	0	1	0	0	0	0 %	0 %	
MECH-TAG-2018 Meeting	3	14	23	72	0	0	3	0	12	4	0 %	0 %	
New Employee On-Boarding	4	6	14	74	0	0	4	0	3	3	0 %	0 %	
PERS-024 2018/04/10 Respectful Workplace (Employees)	4	12	21	72	0	0	4	0	15	15	0 %	0 %	
PERS-024 2018/04/19 Respectful Workplace (Employees)	4	12	21	72	0	0	4	0	1	0	0 %	0 %	
PERS-024 Respectful Workplace (Employees) - BASIC FORM	3	12	21	72	0	0	3	0	0	0	0 %	0 %	
PERS-032 2018/04/10 Respectful Workplace (Managers)	4	12	21	72	0	0	4	0	5	5	0 %	0 %	
PERS-032 2018/04/19 Respectful Workplace (Managers)	4	12	21	72	0	0	4	0	0	0	0 %	0 %	

Page size: 



Page 1 of 3 - Items 1 to 10 of 23

The table of surveys enables you to quickly view and sort your surveys based on a variety of criteria. From here you can also edit and analyze survey results using these icons connected to each survey.

## 2.2 Creating a New Survey

To create a new survey, click on the Surveys counter at the top of the dashboard or Create New Survey link in Administrative Tools.

Click the **New** button on the page containing your surveys. This will launch the Survey editor.

Enter the name of your survey and click **Save**.

Action Save

**[New Survey]**  
Provide basic details for the new survey and click Save.

Survey

Internal Name

Status

The survey editor page will contain the following options displayed in different accordions. You can add questions, answer options, and work with various settings and formatting options.

Action New Save

**My New Survey** Survey Asset #825  
BC Hydro Learning Administrator modified this now

Survey

Settings

Instructions

Programming

Messages

Analysis

Results

## 2.3 Adding Questions & Answer Fields

In the **Survey** accordion, indicate the internal and external name for your survey and select your corporate template to ensure your survey or assessment meets your organizations branding requirements.

Survey

Internal Name   
The internal name is used as an internal reference for filing the survey. It is required field, and it is not visible to the survey respondent.

External Title   
This is the survey title displayed to the survey respondent.

Template   
Your selection here determines the layout and style of the survey page.

Test Link   
This URL is intended for use by administrators only, to review and test the survey. It should not be distributed to recipients.

[Edit Questions](#)

Click **Edit Questions** to add question and answer options to your survey. In the pop-up modal, select your **question format**, indicate **if answers are required, type in your question** and click **Save**.

Add New Question to Survey

**Paging and Sequencing**

Page #

Question #

**Question Format**

Format

Mandatory

**Question Text**

**B I H** [Quote] [List] [Link] [Image] [Eye] [Help]

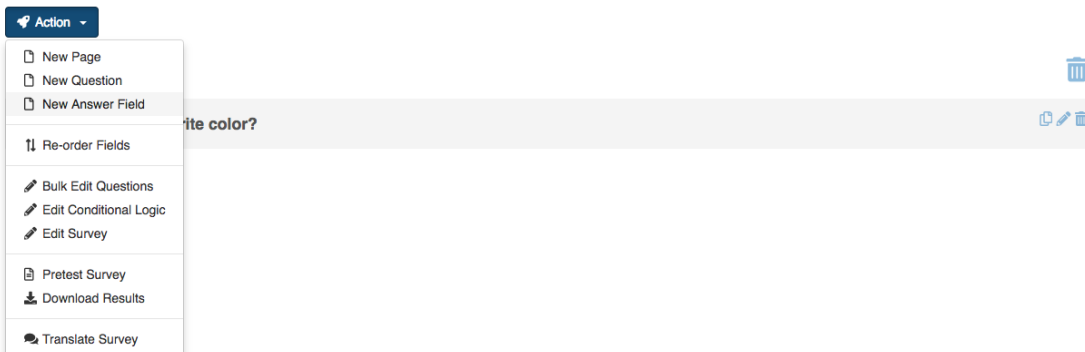
What is your favorite color?

Attach files by dragging and dropping or selecting them.  
Supported file types: .doc .docx .gif .jpg .pdf .png .zip

The questions in your survey are displayed in an outline, in the order it was entered.



You can now add answer fields to your question by selecting **Add Answer Field** in the **Action** menu.



An answer field pop-up will launch where you can select the type of input control you want as your answer fields.



Quantitative input controls include: Radio Button List (single select); Dropdown List (single select), and; Check Box List (multi-select).

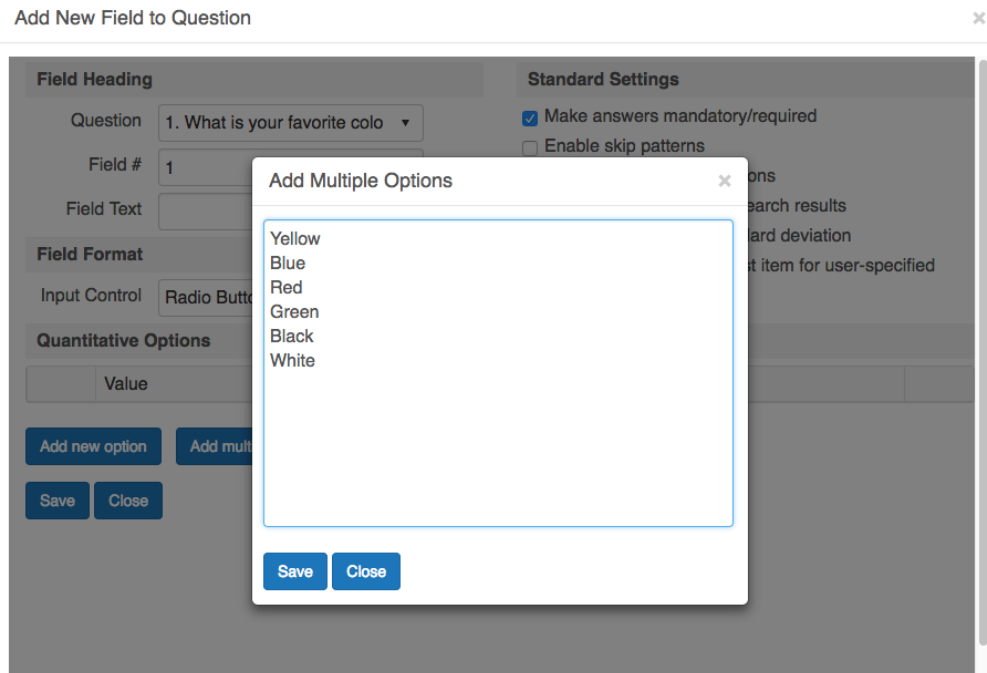
Qualitative input controls include: Text Box (limited characters); Comment Box (unlimited characters); Date Selector; Number Box, and; File Upload.

The screenshot shows a dialog box titled "Add New Field to Question" with a close button (x) in the top right. The dialog is divided into sections: "Field Heading" with fields for "Question" (1. What is your favorite color), "Field #" (1), and "Field Text"; "Field Format" with an "Input Control" dropdown menu. The dropdown menu is open, listing "Quantitative" options: Radio Button List (selected), Dropdown List, and Check Box List; and "Qualitative" options: Text Box, Comment Box, Date Selector, Number Box, and File Upload. "Save" and "Close" buttons are visible at the bottom left of the dialog.

Once you have selected the input control for your answer field, click **Save**. Select from the list of Settings to control the behavior of your answer fields.

The screenshot shows the "Add New Field to Question" dialog box after the "Radio Button List" input control has been selected. The "Field Format" section now shows "Radio Button List" in the "Input Control" dropdown. The "Standard Settings" section is expanded, showing several checkboxes: "Make answers mandatory/required", "Enable skip patterns", "Shuffle/randomize list options", "Show answers in admin search results", "Calculate mean and standard deviation", and "Enable text box beside last item for user-specified option". The "Quantitative Options" section is also visible, showing a table with columns for "Value", "Text", "Score", and "Disabled". "Add new option" and "Add multiple options" buttons are located below the table. "Save" and "Close" buttons are at the bottom of the dialog.

Click **Add Multiple Options** to type or paste your answer fields. Click **Save**.



The questions and answer fields in your survey are displayed in an outline, in the order they were entered.



To **Preview** or **Pretest** a survey to see how it will look to respondents, click the Pretest Survey option in the **Action** menu.



This will launch your survey in a separate browser tab.

## My New Survey

What is your favorite color?

- White
- Black
- Green
- Blue
- Yellow
- Red

SUBMIT

To add a question with a series of items to be rated or scored, select **Add New Question** from the **Action** menu. In the **Format** menu, **select Single-Select Table** enter your question text and click **Save**.

Add New Question to Survey x

**Paging and Sequencing**

Page #

Question #

**Question Format**

Format

Mandatory

- 
-

**Question Text**

B I H “ ☰ ☷ ↻ 🖼️ 👁️ ?

Please rate your satisfaction for the following items:

---

Attach files by dragging and dropping or selecting them.  
Supported file types: .doc .docx .gif .jpg .pdf .png .zip

Click the **Columns** tab and enter values, text and scores for your answer fields. (Note: by entering scores, the system will automatically calculate Means and Standard Deviations on these answer fields.)

Add New Question to Survey x

Question
Columns
Rows

	⇄	⇄	⇄	⇄	⇄	⇄
Value	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>	<input type="text" value="0"/>
Text	<input type="text" value="Very Unhappy"/>	<input type="text" value="Unhappy"/>	<input type="text" value="Meh"/>	<input type="text" value="Happy"/>	<input type="text" value="Very Happy"/>	<input type="text" value="NA"/>
Score	<input type="text" value="1.0"/>	<input type="text" value="2.0"/>	<input type="text" value="3.0"/>	<input type="text" value="4.0"/>	<input type="text" value="5.0"/>	<input type="text" value="0"/>
	🗑️	🗑️	🗑️	🗑️	🗑️	🗑️

Next, click the **Rows** tab and enter the answer fields that you want rated.

Save Close

Question Columns Rows

Title		
Service	<input type="text"/>	
Product Quality	<input type="text"/>	
Timliness	<input type="text"/>	
Value	<input type="text"/>	

Add new row

To **Preview** or **Pretest** a survey to see how it will look to respondents, click the Pretest Survey option in the **Action** menu to view your survey in a separate browser tab.

Please rate your satisfaction for the following items:































	Very Unhappy	Unhappy	Meh	Happy	Very Happy	NA
Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timliness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SUBMIT

## 2.4 Editing Surveys

Clicking on the survey counter will launch a page containing all your surveys.

Surveys » 23 search results

Internal Name	Pages	Questions	Fields	Options	Branches	Conditions	Messages	Invites	Starts	Completes	Click Rate	Response Rate	
Basic Form - Copy	4	14	23	72	0	0	4	0	0	0	0 %	0 %	  
CPC-NET-100	5	11	20	70	0	0	5	0	4	4	0 %	0 %	  
L1SWO	1	9	9	40	0	0	1	0	0	0	0 %	0 %	  
MECH-TAG-2018 Meeting	3	14	23	72	0	0	3	0	12	4	0 %	0 %	  
New Employee On-Boarding	4	6	14	74	0	0	4	0	3	3	0 %	0 %	  
PERS-024 2018/04/10 Respectful Workplace (Employees)	4	12	21	72	0	0	4	0	15	15	0 %	0 %	  
PERS-024 2018/04/19 Respectful Workplace (Employees)	4	12	21	72	0	0	4	0	1	0	0 %	0 %	  
PERS-024 Respectful Workplace (Employees) - BASIC FORM	3	12	21	72	0	0	3	0	0	0	0 %	0 %	  
PERS-032 2018/04/10 Respectful Workplace (Managers)	4	12	21	72	0	0	4	0	5	5	0 %	0 %	  
PERS-032 2018/04/19 Respectful Workplace (Managers)	4	12	21	72	0	0	4	0	0	0	0 %	0 %	  

Page size: 10 1 2 3 Page 1 of 3 - Items 1 to 10 of 23

From here, you can click on the survey name or pencil icon to edit your survey.

The survey editor page will contain the following options displayed in different accordions. You can add questions, answer options, and work with various settings and formatting options.

Action New Save

**My New Survey** Survey Asset #825  
 BC Hydro Learning Administrator modified this now

- Survey 
-  Settings 
-  Instructions 
-  Programming 
-  Messages 
-  Analysis 
-  Results 

In the **Survey** accordion click **Edit Questions**.

Survey

Internal Name   
The internal name is used as an internal reference for filing the survey. It is required field, and it is not visible to the survey respondent.

External Title   
This is the survey title displayed to the survey respondent.

Template   
Your selection here determines the layout and style of the survey page.

Test Link <https://surveys.insitesystems.com/97fb-cc19c267-8ae6-47b0-b0cc-b12be9530bb5>  
This URL is intended for use by administrators only, to review and test the survey. It should not be distributed to recipients.

You can edit question text directly in the table. Click the question to edit in place, or by using the pencil / edit icon you can edit the question and answer field settings.

Page 1

1 What is your favoujite colour?




1 (Field Text) RadioList

**Required**


0	Yellow
1	Blue
2	Red
3	Green
4	Black
5	White




2 Please rate your satisfaction for the following items: RadioListTable



The **Action** menu on this page will enable you to do the following:

-  New Page
-  New Question
-  New Answer Field


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 Re-order Fields

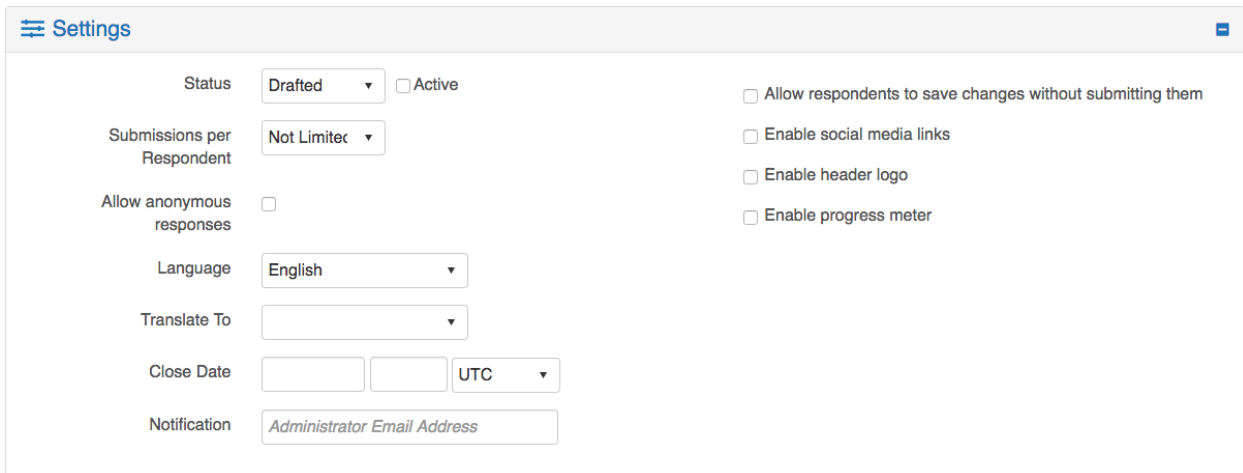
- 
-  Bulk Edit Questions
  -  Edit Conditional Logic
  -  Edit Survey

- 
-  Pretest Survey
  -  Download Results

---

 Translate Survey

The **Settings** accordion enables you to control the behavior of your survey and your respondents.



The screenshot shows the 'Settings' accordion with the following options:

- Status: Drafted (dropdown),  Active
- Submissions per Respondent: Not Limiter (dropdown)
- Allow anonymous responses:
- Language: English (dropdown)
- Translate To: (empty dropdown)
- Close Date: (empty input), (empty input), UTC (dropdown)
- Notification: Administrator Email Address (text input)
- Allow respondents to save changes without submitting them
- Enable social media links
- Enable header logo
- Enable progress meter

Other features enable you to manage individual survey pages, include instructions and custom html, view messages and analyze survey results. These features will be addressed in level 2 training.

-  Pages 
-  Instructions 
-  Programming 
-  Messages 
-  Analysis 
-  Results 



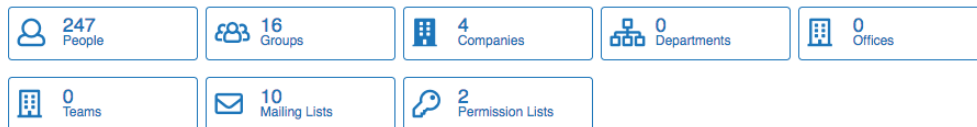
## Part 3: Contacts

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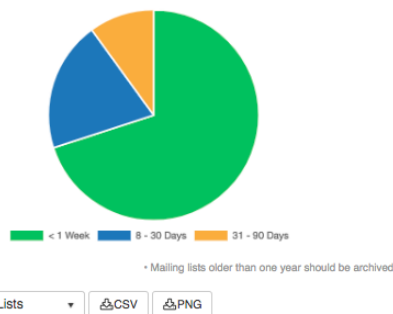
Clicking on the **Contacts** app will launch a dashboard containing all the tools and information you need to **add, organize** and **manage** contacts and lists.

Counters at the top of the dashboard act as shortcuts, and the charts and graphs indicate a summary of contacts in your account.

### Contact Types



### Contact Summary



### Contact Administration Tools

- Create a New Person  
Add a new person to your contact library.
- Create a New Group  
Add a new company, department, team, or mailing list to your contact library.
- Group Outlining Tool

### Recent Contacts

- PERS-024 2018-04-19 Respectful Workplace (Employees) Group  
Dina Parmar modified this 2 hours ago
- Jing Zhao  
Jing.Zhao@bchydro.com  
Dina Parmar modified this 2 hours ago

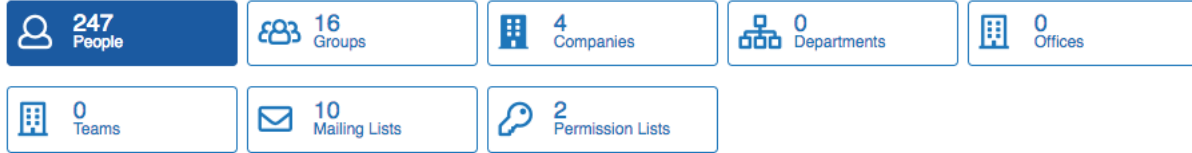
Below the summary charts and graphs, you can quickly launch tools to create new: people, groups and more.

A summary of recent contacts is also included to find recent contacts.

### 3.1 Contact Counters

Counters display the number of contacts by type and act as short cuts to enable you to: **search, find, view, create** and **edit** your contacts.

## Contact Types



Clicking on the People counter will launch a page containing all your Contacts. From here, you can use the fields in the **Search** menu to search for specific contacts; the **Action** menu to execute specific tasks, or; click the **New** button to create a new contact.

Q Search ▾ Action ▾ New Download

People » 247 search results

Name	Email	Address	
Aasen, Elin	elin.aasen@bchydro.com		
Adams, Brandon	brandon.adams@bchydro.com		
Administrator, BC Hydro Learning	bchydro.admin@shifitq.com		
Akbulatova, Alevtina	alevtina.akbulatova@bchydro.com		
Alho, Gil	gil.alho@bchydro.com		
Anderlini, Gordon	Gordon.Anderlini@bchydro.com		
Andersen, Meg	meg.andersen@bchydro.com		
Andruff, Melissa	Melissa.Andruff@bchydro.com		
Anilkumar Prabha, Arun	Arun.AnilkumarPrabha@bchydro.com		
Antonio, Vince	Vincent.Antonio@bchydro.com		

Page size: 10 ▾ 1 2 3 4 5 6 7 8 9 10 ... Page 1 of 25 - Items 1 to 10 of 247

The table of contacts enables you to quickly view and sort your contacts by name and email address. From here you can also edit information for each contact.

### 3.2 Creating a New Contact

To create a new contact, click on the People counter at the top of the dashboard or Create New Person link in Administrative Tools.

Click the **New** button on the page containing your surveys. This will launch the Contact editor. Enter the basic contact information and click **Save**.

Action Save

**[New Person]**  
Provide basic details for the new contact person and click Save.

**Person**

Honorific: Mr.

First Name: Charlie

Last Name: Brown

Email: charlie@peanuts.com

Company:

Job Title:

Check for potential duplicates

**Sign In**

Enable

Other features enable you to manage individual contact information such as address, affiliation to groups, departments or business units, any activities the contact is assigned to in addition to account settings. These features will be addressed in level 2 training.

Action New Save

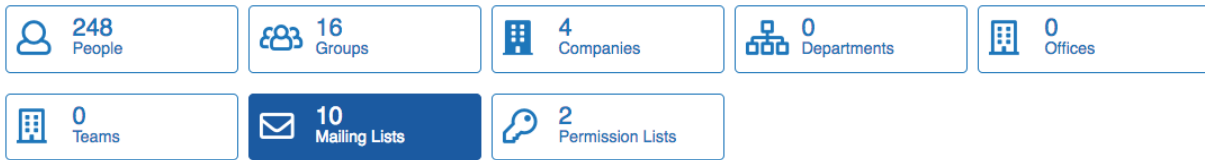
**Charlie Brown**  
BC Hydro Learning Administrator modified this now

- Person
- Settings
- Address
- Relationships
- Groups
- Assignments
- Sign In

### 3.3 Importing a List of Contacts

Clicking on the Mailing Lists counter will launch a page containing all your Mailing Lists. From here, you can use the fields in the **Search** menu to search for specific contacts; the **Action** menu to execute specific tasks, or; click the **New** button to create a new list.

## Contact Types

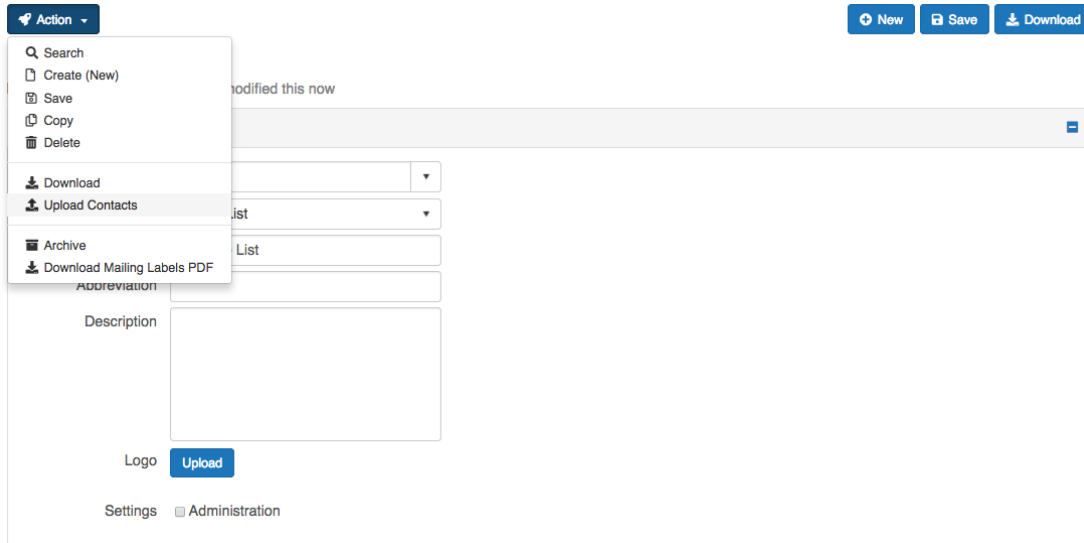


The table of contacts enables you to quickly view and sort your contacts by name and email address. From here you can also edit information for each contact.

Click the **New** button, give your list a name and then click **Save**. You can now upload contacts to your list.

A screenshot of a web interface showing the 'Example List' form. At the top, there is an 'Action' menu and buttons for 'New', 'Save', and 'Download'. The form title is 'Example List' with a sub-label 'Mailing List' and a notification 'BC Hydro Learning Administrator modified this now'. The form fields include: 'Parent' (dropdown), 'Type' (dropdown set to 'Mailing List'), 'Name' (text input 'Example List'), 'Abbreviation' (text input), and 'Description' (text area). There is an 'Upload' button next to the 'Logo' label and a 'Settings' section with a radio button for 'Administration'.

Click the **Action** menu and select **Upload Contacts**.



To upload contacts, your contacts must be on a .csv file with the **First Name**, **Last Name** and **Email** in separate columns. As a reminder, we have included the formatting requirements directly on this page as instructions.

Use the **Choose File** button to locate your contact list. Then, click the upload button to **Upload** your contacts.

Action
Preview Upload

### Upload Contact People

Your upload file must contain Comma Separated Values (CSV) and must include these columns in this sequence with these titles:

FirstName	LastName	Email
Jane	Austen	jane.austen@famousauthors.org
Mark	Twain	mark.twain@famousauthors.org
Charles	Dickens	charles.dickens@famousauthors.org

You can include optional columns Number and Status. [Download a template.](#)

Group:    
Select an existing group or input the name of a new group.

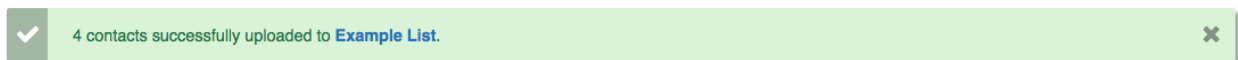
Approve login credentials for all uploaded contacts

Upload File:  Workbook1.csv

Encoding:

! Remember, your file must include titles on every column.

A successful upload message will be displayed.



## Part 4: Messages & Survey Invitations

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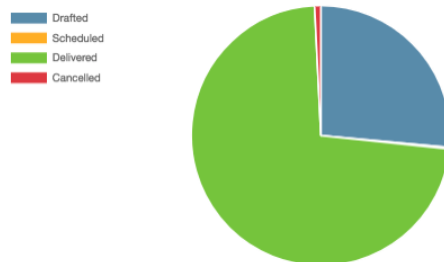
Clicking on the **Messages** app will launch a dashboard containing all the tools and information you need to **add, organize** and **manage** messages and survey invitations.

Counters at the top of the dashboard act as shortcuts, and the charts and graphs indicate a summary of messages in your account.

### Message Types



### Message Summary



### Message Administration Tools

[Create a New Message](#)  
Add a new email message.

### Recent Messages

- Demo** Survey Invitation Asset #829 2 recipients  
Demo for CC  
Ann Conway modified this 5 hours ago
- PROF-111 LFG ONE Part B Feedback** Survey Invitation Asset #677 2 recipients  
Please complete 10 mins LFG1 Part B Feedback form  
BC Hydro Learning Administrator modified this 3 days ago

Below the summary charts and graphs, you can quickly launch tools to create new messages, survey invitations, newsletters and more.

A summary of recent messages is also included to find, or analyze, recent work.

### 4.1 Message & Survey Invitation Counters

Counters display the number of messages by type and act as short cuts to enable you to: **search, find, view, create** and **edit** your messages and survey invitations.

### Message Types



Clicking on the **Invitations** counter will launch a page containing all your survey invitations. From here, you can use the fields in the **Search** menu to search for specific messages; the **Action** menu to execute specific tasks, or; click the **New** button to create a new message or survey invitation.

**Messages** » 13 search results

Modified	Type	Internal Name	External Subject	Recipients	
Apr 17, 2018	Survey Invitation	Anthony's Demo	Anthony's Demo	0	
Apr 17, 2018	Survey Invitation	Demo	Demo for CC	2	
Apr 14, 2018	Survey Invitation	PROF-111 LFG ONE Part B Feedback	Please complete 10 mins LFG1 Part B Feedback form	2	
Apr 14, 2018	Survey Invitation	PROF-121 Taking the Stage Module 1	Plse Complete 10 min Taking the Stage Module 1 Feedback	16	
Apr 13, 2018	Survey Invitation	Demo	Basic Form	5	
Apr 13, 2018	Survey Invitation	Demo	Basic Form	0	
Apr 11, 2018	Survey Invitation	PERS-032 2018/04/19 Respectful Workplace (Managers)	Please complete 10 min PERS-032 RWP Feedback Form	21	
Apr 11, 2018	Survey Invitation	PERS-024 2018/04/19 Respectful Workplace (Employees)	Please complete 10 min PERS-024 RWP Feedback Form	21	
Apr 11, 2018	Survey Invitation	CPC-NET-100 March 2018 Vernon	CPC-NET-100 March 2018 Vernon	8	
Apr 11, 2018	Survey Invitation	Demo	Basic Form	0	

Page size:   
Page 1 of 2 - Items 1 to 10 of 13

The table of messages enables you to quickly view and sort your messages. From here you can also edit, delete or archive your messages.

## 4.2 Creating a New Survey Invitation

To create a new survey invitation, click on the Invitations counter at the top of the dashboard or Create New Message link in Administrative Tools.

Click the **New** button on the page containing your Messages. This will launch the Message editor.

Enter the **Message Type**, find and select the **Survey** you want attached to the message, enter a **Name** and **Subject Line** for your message and fill in sender information for your message, and click **Save**.

**Action** **Save**

**[New Message]**  
Provide basic details for the new message and click Save.

**Message**

Message Type: Survey Invitation

Survey: PROF-111 Leading for Generations ONE Part B

Internal Name:

External Subject: Leading for Generations

Sender Address: ann.conway@bchydro.com

Sender Name: BC Hydro Learning & Development

Next, click the **Edit Message Content** button in the **Content** accordion. This will launch a new browser tab where you can enter text, links and other formatting features and preview your work at the same time.

**Action** **New** **Save**

**Leading for Generations** Survey Invitation Asset #834  
BC Hydro Learning Administrator modified this now

**Message**

**Content**

**Edit Message Content**

**Recipients**

**Links**

**Deliveries**

**Comments**

To help you get started, we have included instructions directly in the left hand panel. Simply write over the text with the message you want to create and preview your work in real-time in the right hand panel.

**Message Content Authoring Tool** SAVE | SHUT-AND-CLOSE | EXPORT AS

DOCUMENT NAME: Leading for Generations Part B | TO-TOOL NAME: BC Hydro - Learning | DOCUMENT STYLE: Arial | DOCUMENT TYPE: Email Message

MARKDOWN | H | B | I | Placeholder | [Icons]

1 - Welcome to the new Content Authoring Tool

2

3 This authoring tool is designed to be fast, light, and easy to use. Most important, it is designed to help author content with a lower chance of triggering "false-positive" matches on mail server spam filters - so that survey invitations and e-newsletters have a greater probability of getting through to your email subscribers.

4

5 Notice as you write content in the left panel, a running preview is displayed in the right panel.

6

7 ## Formatting Tips

8

9 Use the hash symbol to indicate headings (H) and sub-headings (##).

10

11 Use a double-asterisk to bold a **word or phrase**.

12

13 Use hyphens to create a list of items:

14

15 - Item 1

16 - Item 2

17 - Item 3

18

19 Use a right angle bracket for a quote:

20

21 > "The time has come," the Walrus said,

22 > "To talk of many things:

23 > Of shoes - and ships - and sealing-wax -

24 > Of cabbages - and kings -

**Welcome to the new Content Authoring Tool**

This authoring tool is designed to be fast, light, and easy to use. Most important, it is designed to help author content with a lower chance of triggering "false-positive" matches on mail server spam filters - so that survey invitations and e-newsletters have a greater probability of getting through to your email subscribers.

Notice as you write content in the left panel, a running preview is displayed in the right panel.

**Formatting Tips**

Use the hash symbol to indicate headings (H) and sub-headings (##).

Use a double-asterisk to bold a word or phrase.

Use hyphens to create a list of items:

- Item 1
- Item 2
- Item 3

Use a right angle bracket for a quote:

"The time has come," the Walrus said, "To talk of many things: Of shoes - and ships - and sealing-wax - Of cabbages - and kings - And why the sea is boiling hot - And whether pigs have wings." - Lewis Carroll

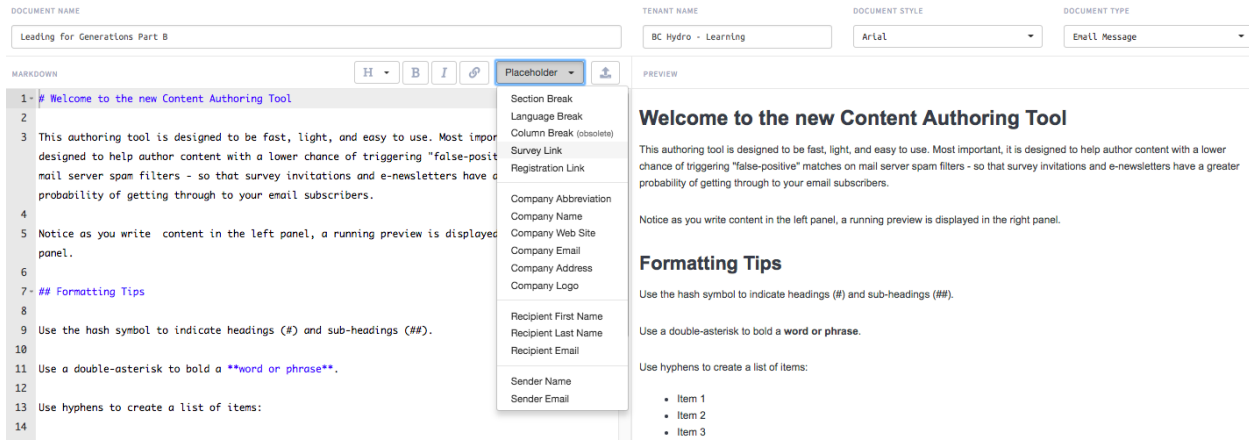
Use three backtick characters for an inset block of plain text:

```
Meeenae curru rutrum ultricies. Aliquam sit amet lorem erat. Class aptent taciti sociosque ad litora torquent per conubia nostra, per inceptos himenaeos.
```



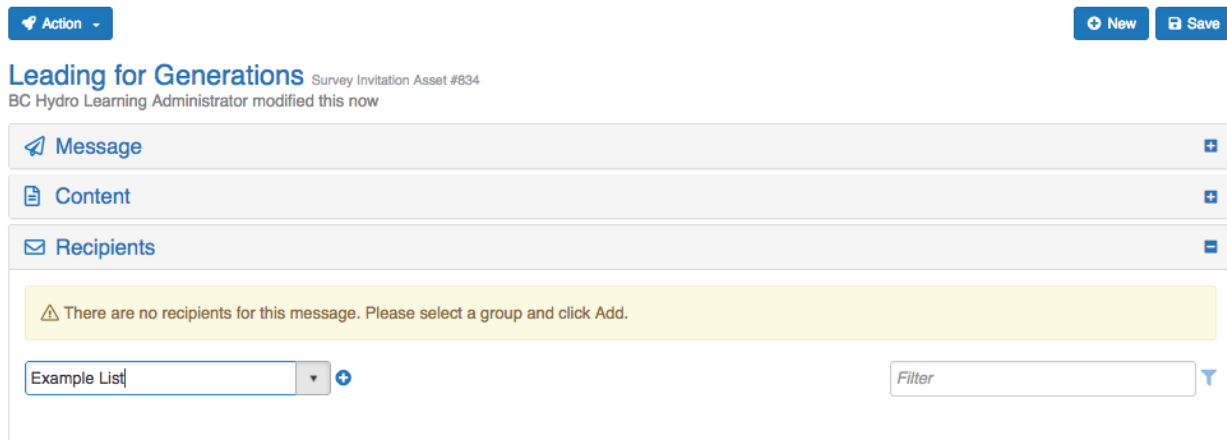
Place your cursor inside the left hand panel where you want to insert the link to your survey.

Next, in the **Placeholder** menu, select **Survey Link**, click **Save**.



### 4.3 Emailing a Survey Invitation

In the **Recipients** accordion select the **Mailing List(s)** in the menu to email your survey invitation. Click the + sign to **add** your list(s). Click **Save**.



You can now preview the contacts on your mailing list. Send, Edit and Delete functions are connected to each contact.

✉ Recipients

Select Group ▼ + Filter ▼

**Groups** 1

Name	
Example List	

**People** 4

Name	Email	Status	
Archie Bunker Example List	archie@gmail.com		
Charlie Brown Example List	charlie@peanuts.com		
Mike Mcdonald Example List	mike@mechanics.com		
Peter Gabriel Example List	peter@genesis.com		

To **Schedule** and **Send** your list click the **Schedule** button at the top of the page.

⚙ Action ▼ New Save Schedule

**Leading for Generations** Survey Invitation Asset #834  
 BC Hydro Learning Administrator modified this 12 minutes ago

Message	<span>+</span>
Content	<span>+</span>
Recipients	<span>+</span>
Links	<span>+</span>
Deliveries	<span>+</span>
Comments	<span>+</span>

Description of the survey invitation will be displayed at the top of the page. Set the **Date** and **Time** and click the **Send/Schedule** button.

Action -

## Send Survey Invitation

Created by BC Hydro Learning Administrator 14 minutes ago - Last modified by BC Hydro Learning Administrator 40 seconds ago

<b>From</b>	BC Hydro Learning & Development <ann.conway@bchydro.com>
<b>Subject</b>	Leading for Generations
<b>To</b>	Archie Bunker <archie@gmail.com> Charlie Brown <charlie@peanuts.com> Mike Mcdonald <mike@mechanics.com> Peter Gabriel <peter@genesis.com>

## Delivery Information

You can specify when this message should be delivered.

Date and Time   

Time Zone  ▼

Send / Schedule

\* Outgoing messages are delivered every ten minutes, so if you send this message now the estimated wait time for delivery is three minutes.

You have now completed the steps for setting up a survey, uploading contacts and creating and sending your first survey invitation. Well done!