



Quick guide defgo

Distributed by Interresearch als

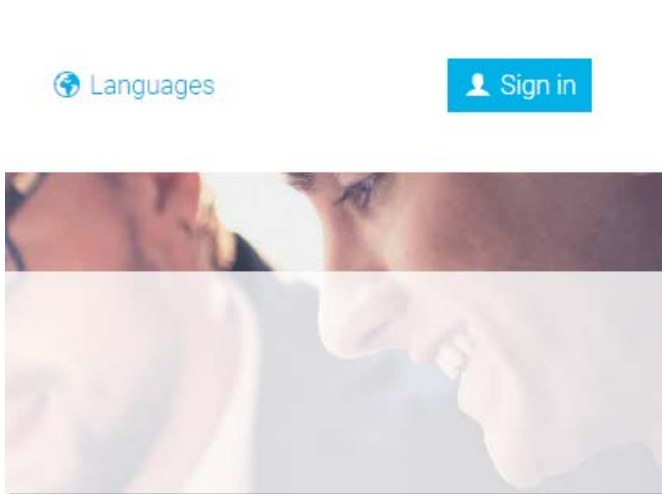
April 2019

defgo

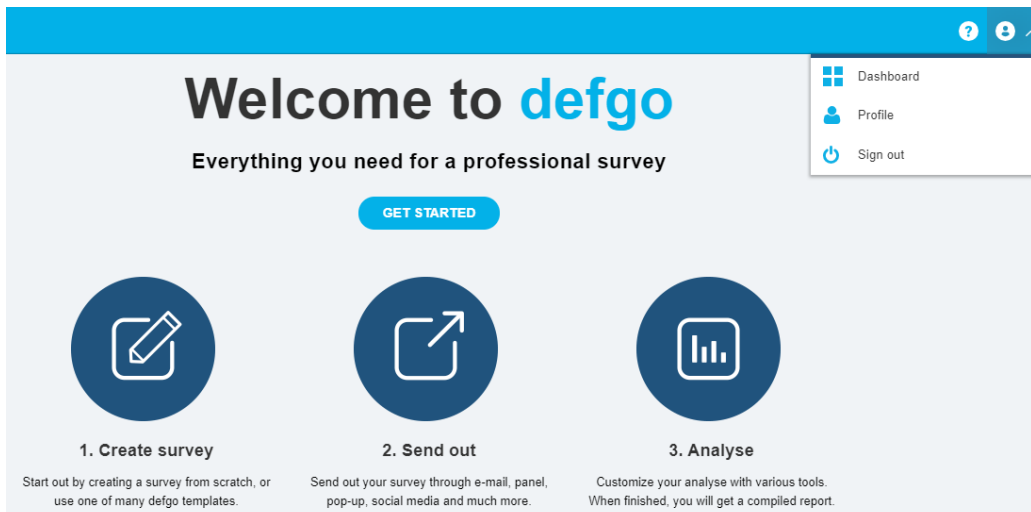
I Start

1. Start defgo.net

1.1 Go to the website www.defgo.com. Click on **Sign in** and then enter your **Username** and **Password**.



1.2 When you are signed in, you will see **defgo Dashboard**.



1.3 Here you will also find **Support** contact information.

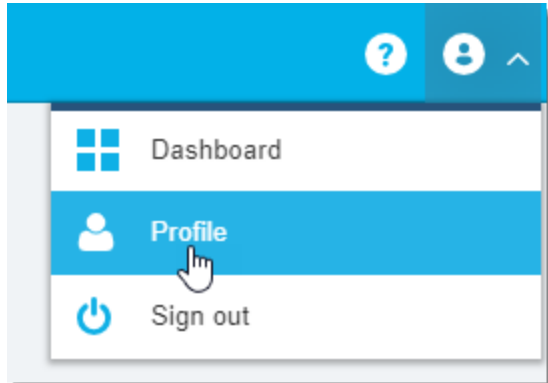
Our support team is ready to help you

Support Telephone
+45 888 21 889

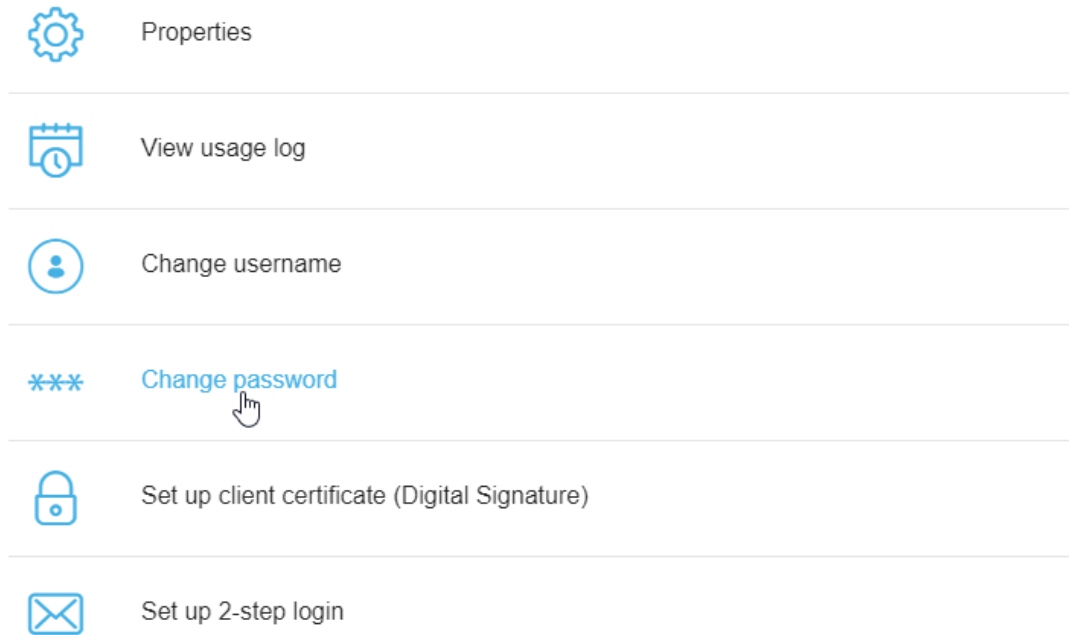
E-mail
support@defgo.com

2. Change password

2.1 Click on the icon on the top right corner, select **Profile** from the menu.



2.2 Click on **Change password**.

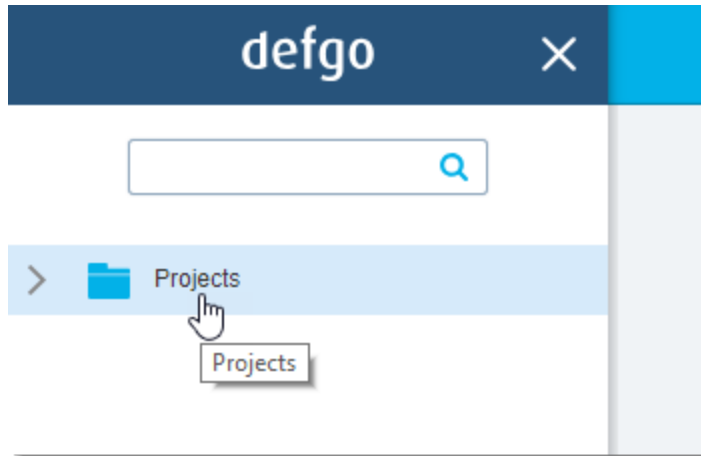


2.3 **Password** should consist of at least 8 characters and contain both letters and numbers.

If you are about to share your account with multiple users, remember that they must be informed, if you changed the password.

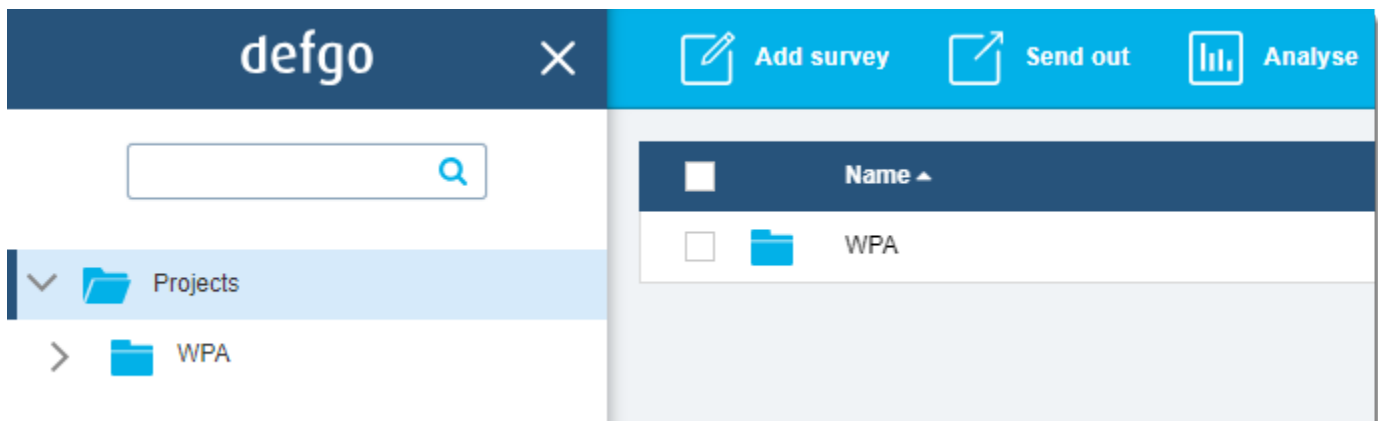
II Desktop and toolbar

Click on **Projects**:



Under the folder **Projects** you will see the desktop and the toolbar with tools for creating surveys, reports, panels etc.

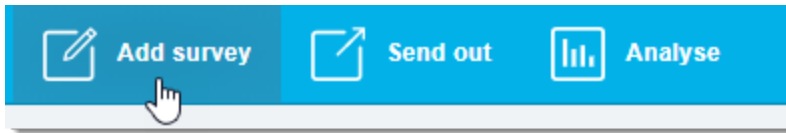
– **Add survey, Send out, Analyse.**



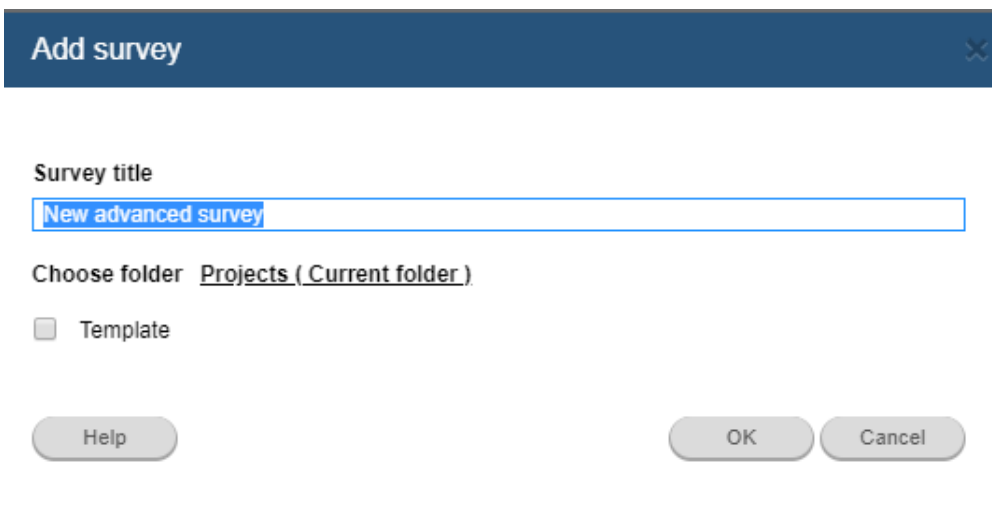
III Create survey

1. Create a new survey

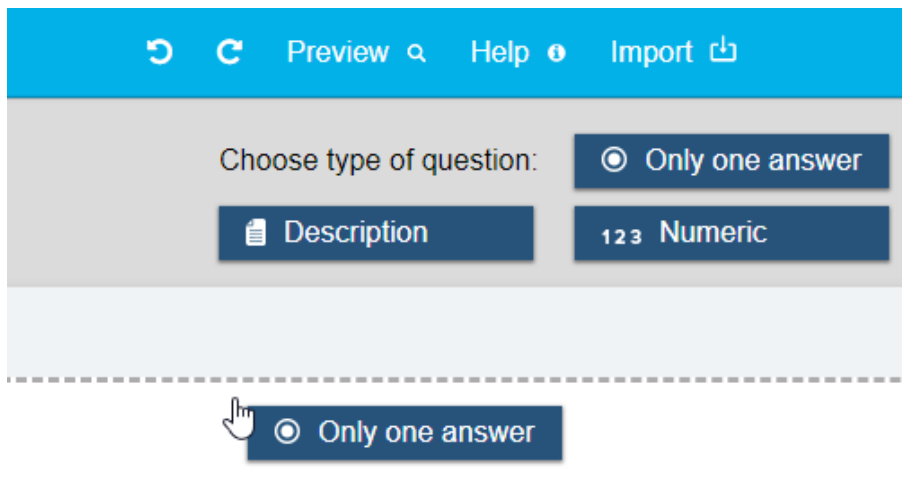
1.1 Click on **Add survey** in the top toolbar.



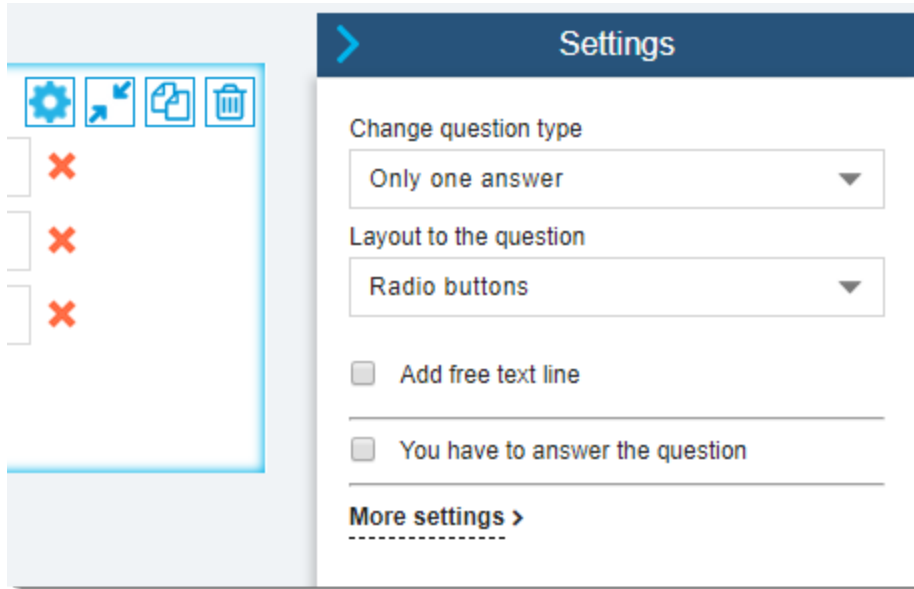
1.2 Enter a survey title. You can either create a survey based on a template by checking the box **Template** or create a survey from scratch (settled by default).

A screenshot of the 'Add survey' dialog box. It has a title bar 'Add survey' with a close button. Below the title bar, there is a 'Survey title' label and a text input field containing 'New advanced survey'. Below that is a 'Choose folder' label and a dropdown menu showing 'Projects (Current folder)'. There is a checkbox labeled 'Template' which is currently unchecked. At the bottom, there are three buttons: 'Help', 'OK', and 'Cancel'.

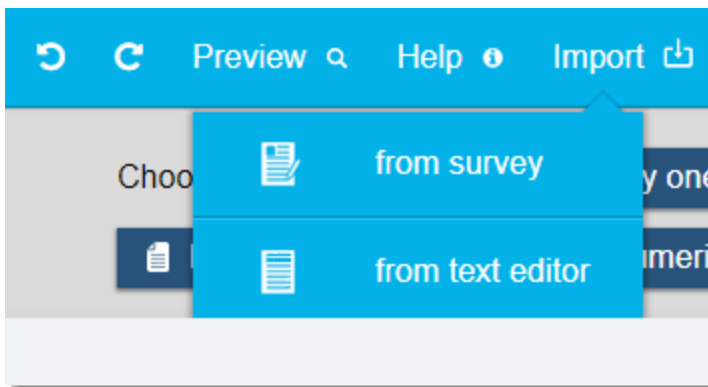
1.3 Drag and drop a question to the survey or use double click on a question.



1.4 For each question you can change **Settings** in the menu to the right.



1.5 You can also **Import** questions from the previously created survey or from the text editor.



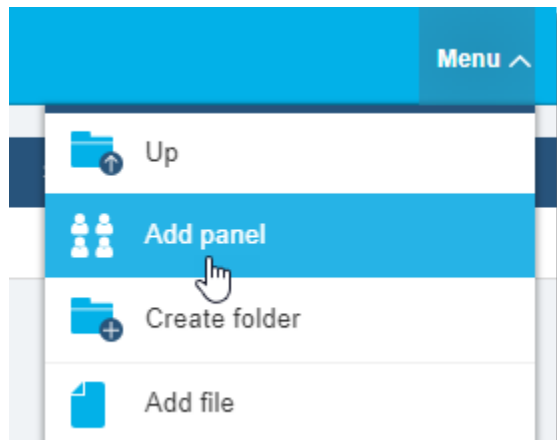
1.6 When you finished, click on **Save** and **Exit**.



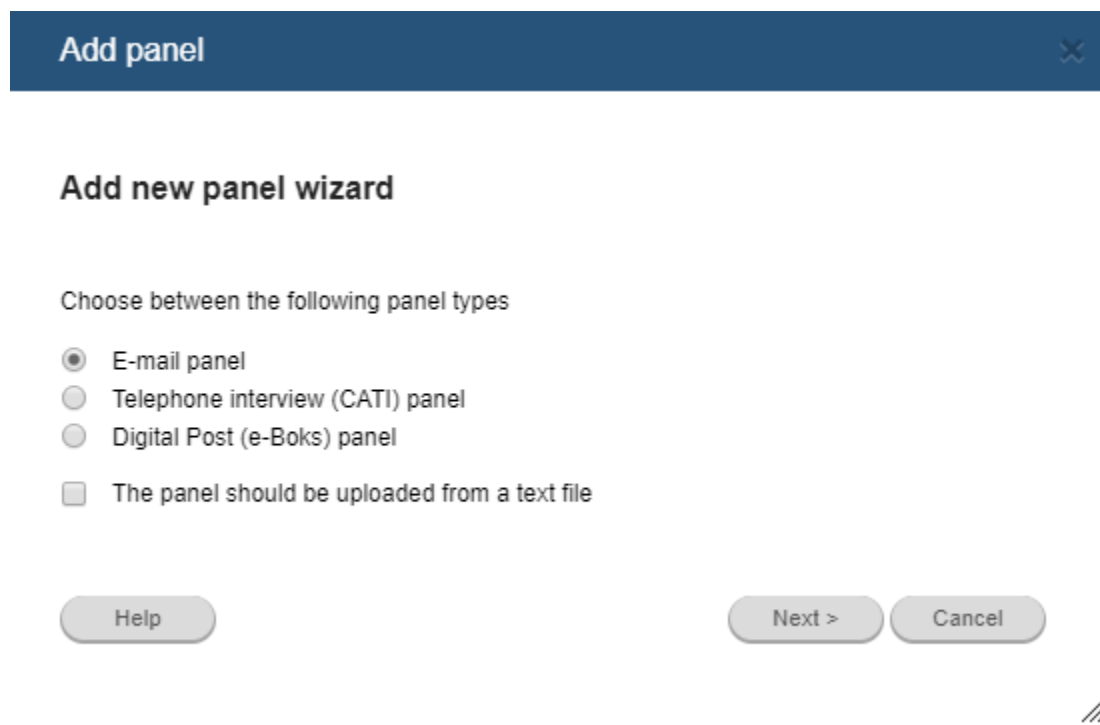
IV Create panel and send out

1. Create e-mail panel

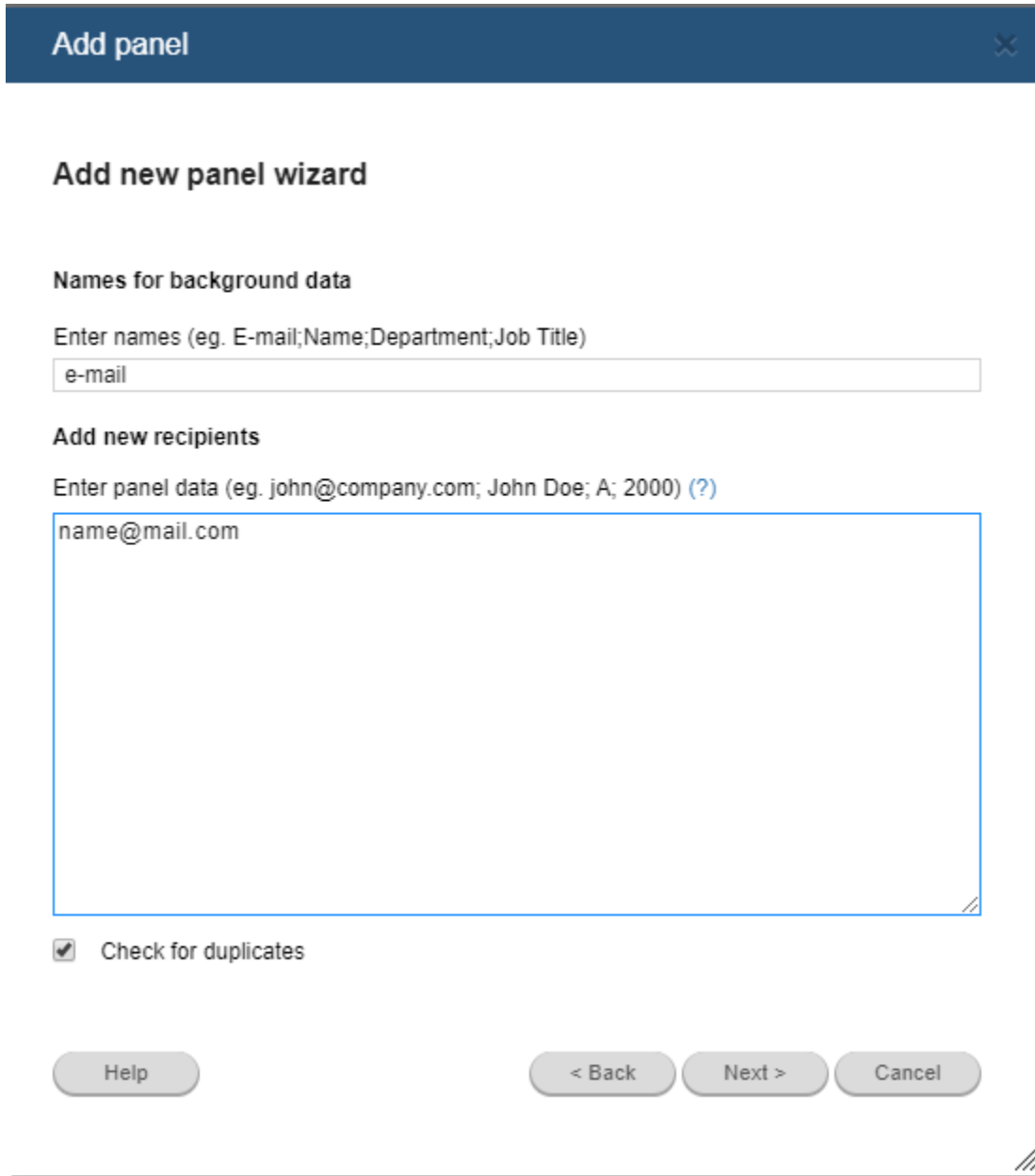
1.1 Click on **Add panel** in the dropdown menu



1.2 A dialog box opens, **E-mail panel** is selected by default. Click on **Next**.



1.3 In the upper line write names for background data separated by semicolon. In the large field enter e-mail addresses and names separated by semicolon - a line for each respondent. You can also copy and past your background data from **Excel**. Click on **Next**.



The screenshot shows a window titled "Add panel" with a close button in the top right corner. Below the title bar is the heading "Add new panel wizard". Underneath, there are two sections:

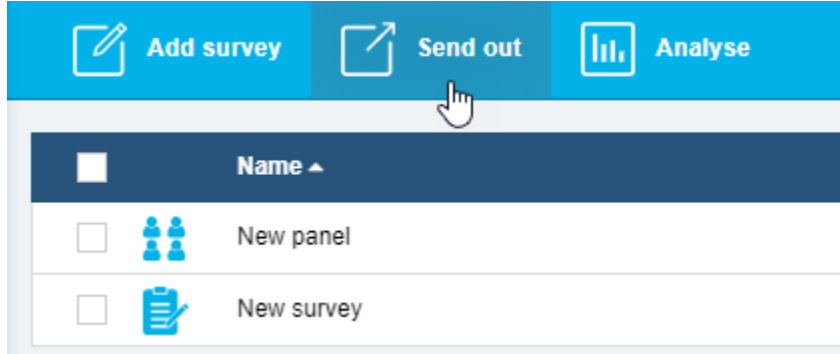
- Names for background data**: A label "Enter names (eg. E-mail;Name;Department;Job Title)" is above a text input field containing "e-mail".
- Add new recipients**: A label "Enter panel data (eg. john@company.com; John Doe; A; 2000) (?)" is above a large text area containing "name@mail.com".

At the bottom left, there is a checked checkbox labeled "Check for duplicates". At the bottom right, there are three buttons: "Help", "< Back", and "Next >", followed by a "Cancel" button.

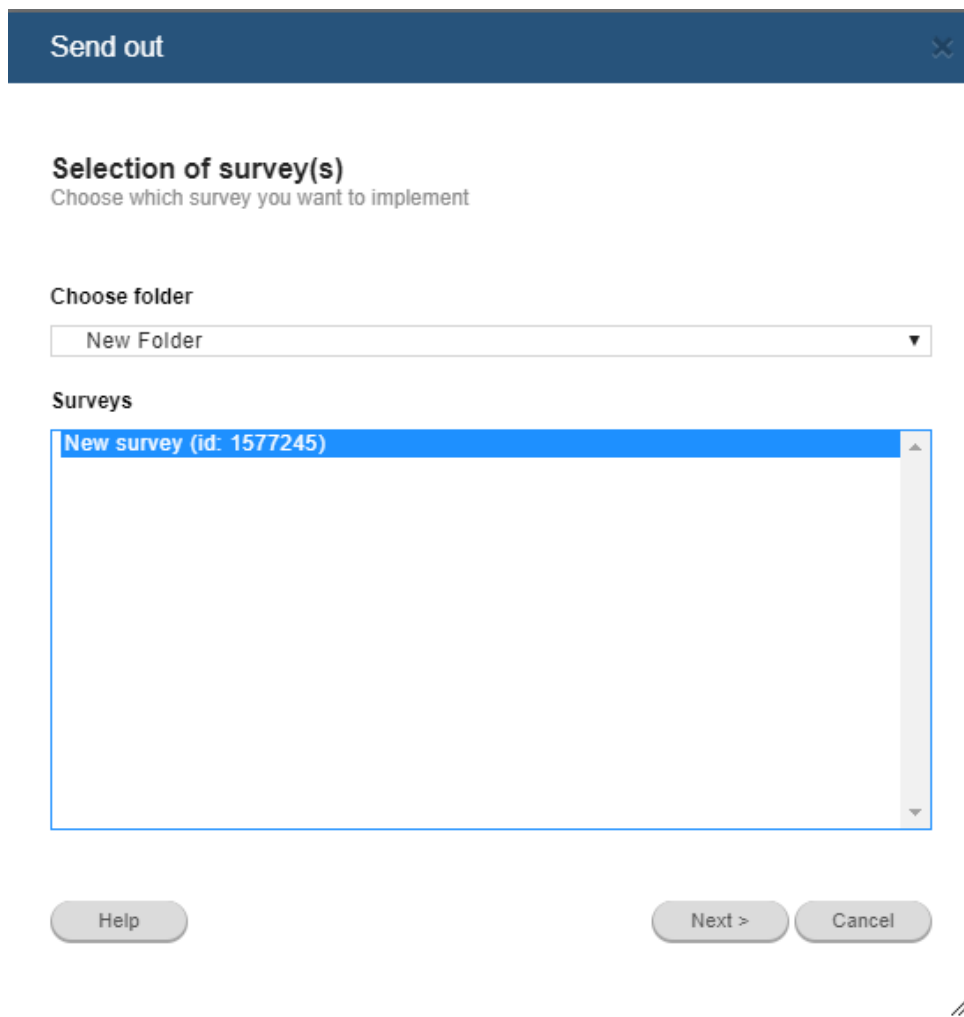
1.4 Name the panel and click on **Exit**.

2. Send out to e-mail panel

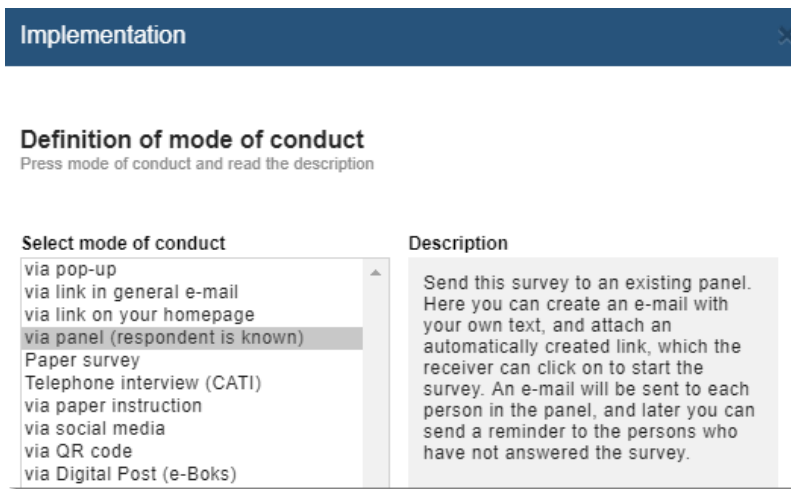
2.1 Click on **Send out** in the top toolbar.



2.2 Select the survey. Click on **Next**.



2.3 Select **Via panel** and click on **Next**.



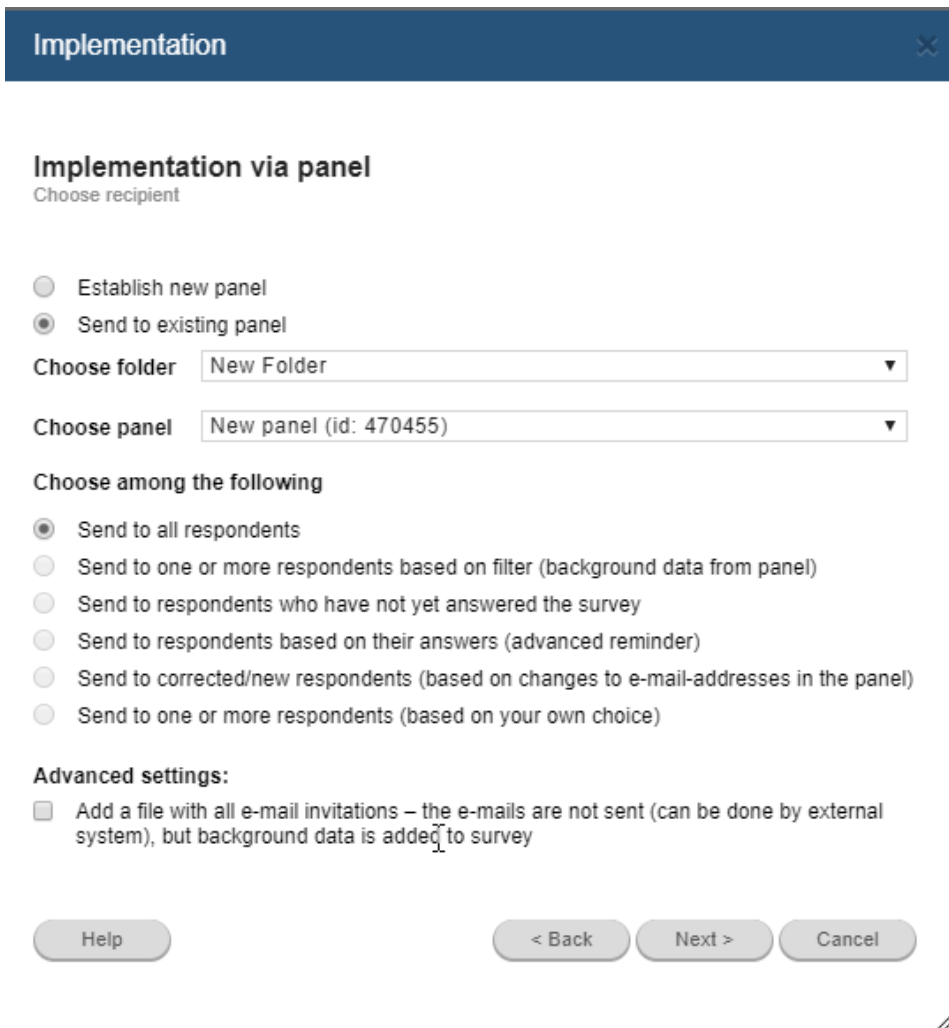
Implementation

Definition of mode of conduct
Press mode of conduct and read the description

Select mode of conduct	Description
via pop-up	
via link in general e-mail	
via link on your homepage	
via panel (respondent is known)	Send this survey to an existing panel. Here you can create an e-mail with your own text, and attach an automatically created link, which the receiver can click on to start the survey. An e-mail will be sent to each person in the panel, and later you can send a reminder to the persons who have not answered the survey.
Paper survey	
Telephone interview (CATI)	
via paper instruction	
via social media	
via QR code	
via Digital Post (e-Boks)	

2.4 Select **Establish new panel** or **Send to existing panel**. Option **Send to all respondents** is chosen by default.

Click on **Next**. (**NOTE:** be careful when choosing panel - it is not fortunate to send out a survey to wrong respondents).



Implementation

Implementation via panel
Choose recipient

Establish new panel

Send to existing panel

Choose folder

Choose panel

Choose among the following

Send to all respondents

Send to one or more respondents based on filter (background data from panel)

Send to respondents who have not yet answered the survey

Send to respondents based on their answers (advanced reminder)

Send to corrected/new respondents (based on changes to e-mail-addresses in the panel)

Send to one or more respondents (based on your own choice)

Advanced settings:

Add a file with all e-mail invitations – the e-mails are not sent (can be done by external system), but background data is added to survey

Help < Back Next > Cancel

2.5 Edit the default e-mail (**NOTE:** do not remove the desired merge fields in square brackets]).

You can choose the **plain text** and **design** text formats. If you choose **design** you can format the e-mail text, insert images etc.

Implementation

Mode of conduct

Please fill out the details for the email to be send

Template

None (use system default)

Subject

Invitation to participation in survey

Sender email (e.g. your_name@your_company.com)

name@mail.com

Sender name

Reply email - typically same as sender email

name@mail.com

Message

Dear !

We're carrying out a survey and would really appreciate your input

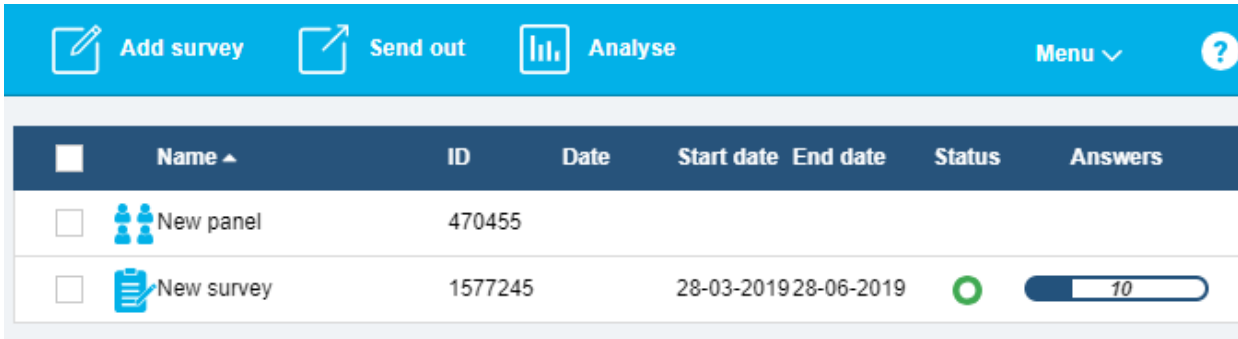
GET STARTED!





//

2.6 Click on **Next** and **Exit**.

V Create report

To follow the response process, you can either see the number of answers next to the survey under **Answers**



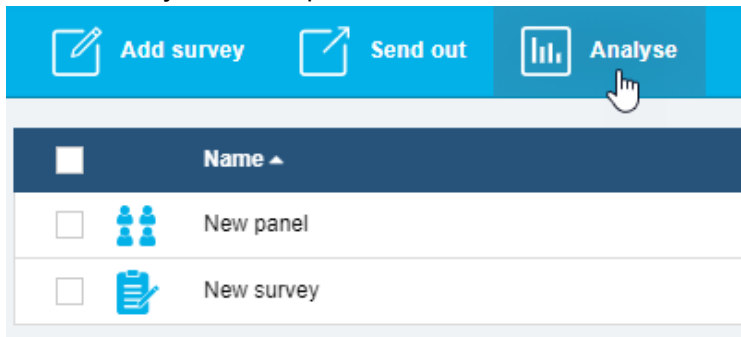
	Name ▲	ID	Date	Start date	End date	Status	Answers
<input type="checkbox"/>	 New panel	470455					
<input type="checkbox"/>	 New survey	1577245		28-03-2019	28-06-2019		

or you can create an **Analysis report** that counts the answers that were given to the various questions.

This report, you can continuously update, so you can constantly keep an eye on data collection.

1. Add analysis report

1.1 Click on **Analyse** in the top toolbar.



1.2 Select the survey and click on **Ok**.



1.3 The analysis wizard with 5 tabs opens.

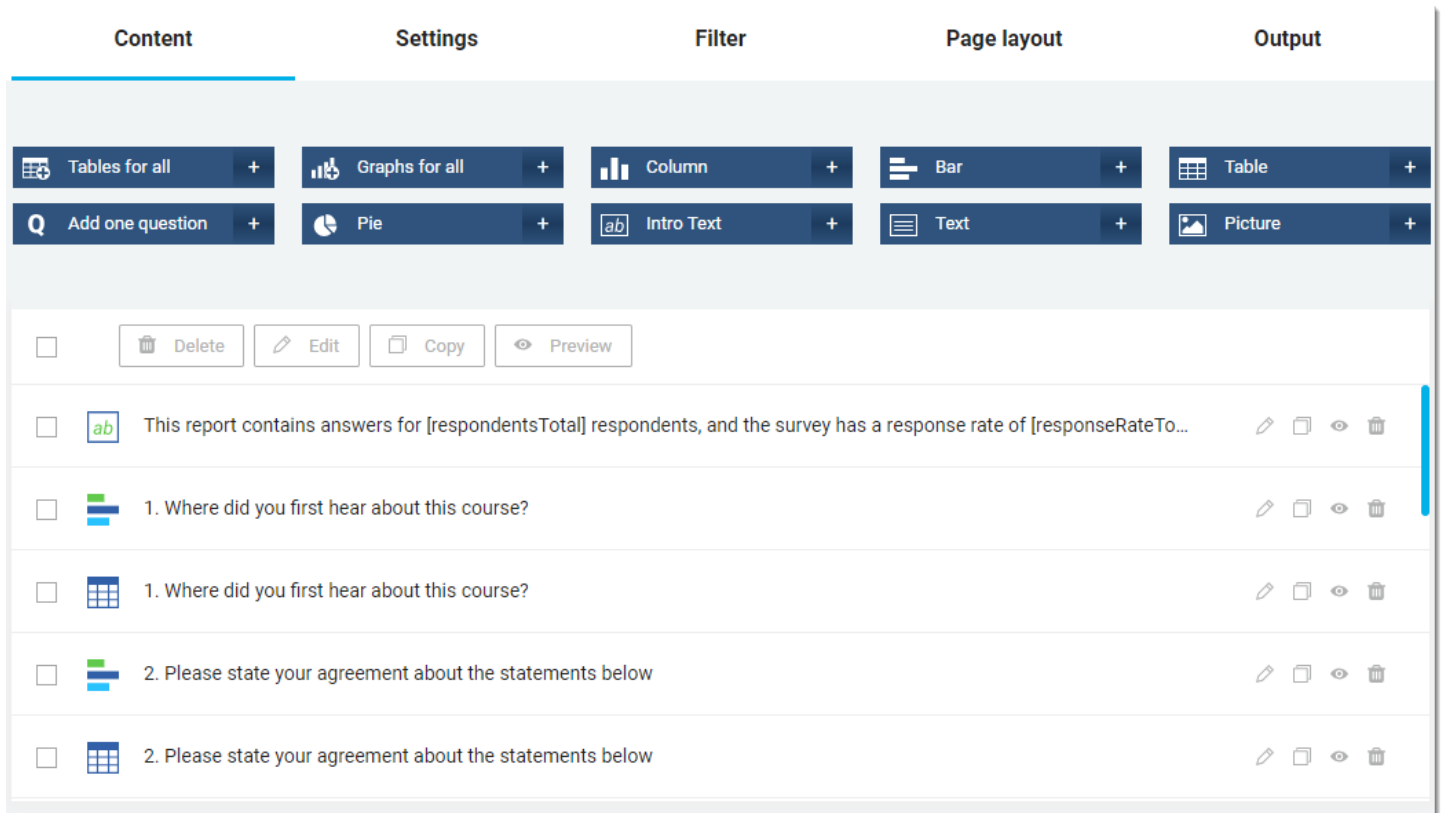
On the first tab, **Content**, you decide on which questions you want to include in the report, how to display them (table or graph), and their order.

Under **Settings** you select general settings for the report such as calculations, language, matrix graphs.

Under **Filter** you can choose whether you want to see the answers from the respondents sorted on different criteria.

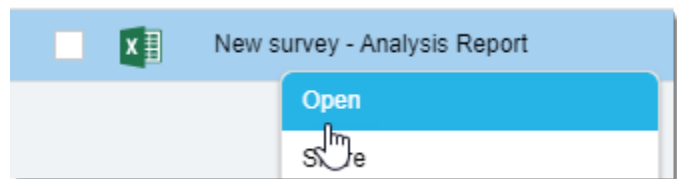
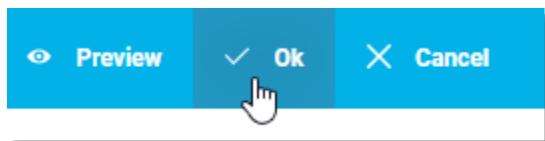
Under **Page layout** you can decide on the report design - color themes, images and logo.

Finally, under **Output** you can choose report format - Excel, PDF or PowerPoint.



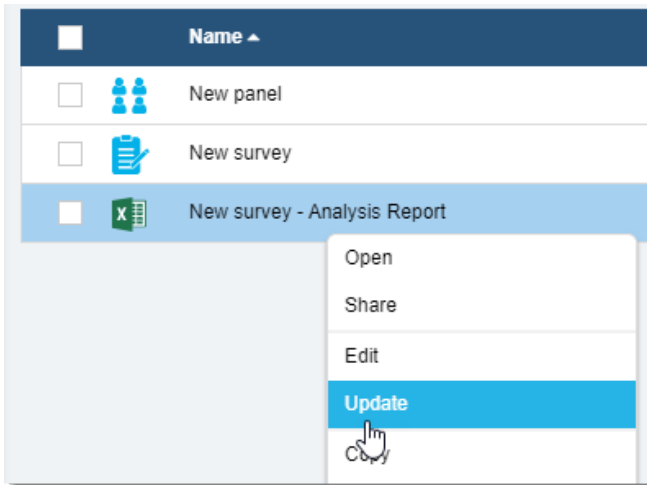
1.4 If you just click on **Ok** immediately, you will get a report in **Excel** with graphs and tables for each question.

To look at click on the report and select **Open**.



2. Report update

For manual update click on your report and select **Update**.

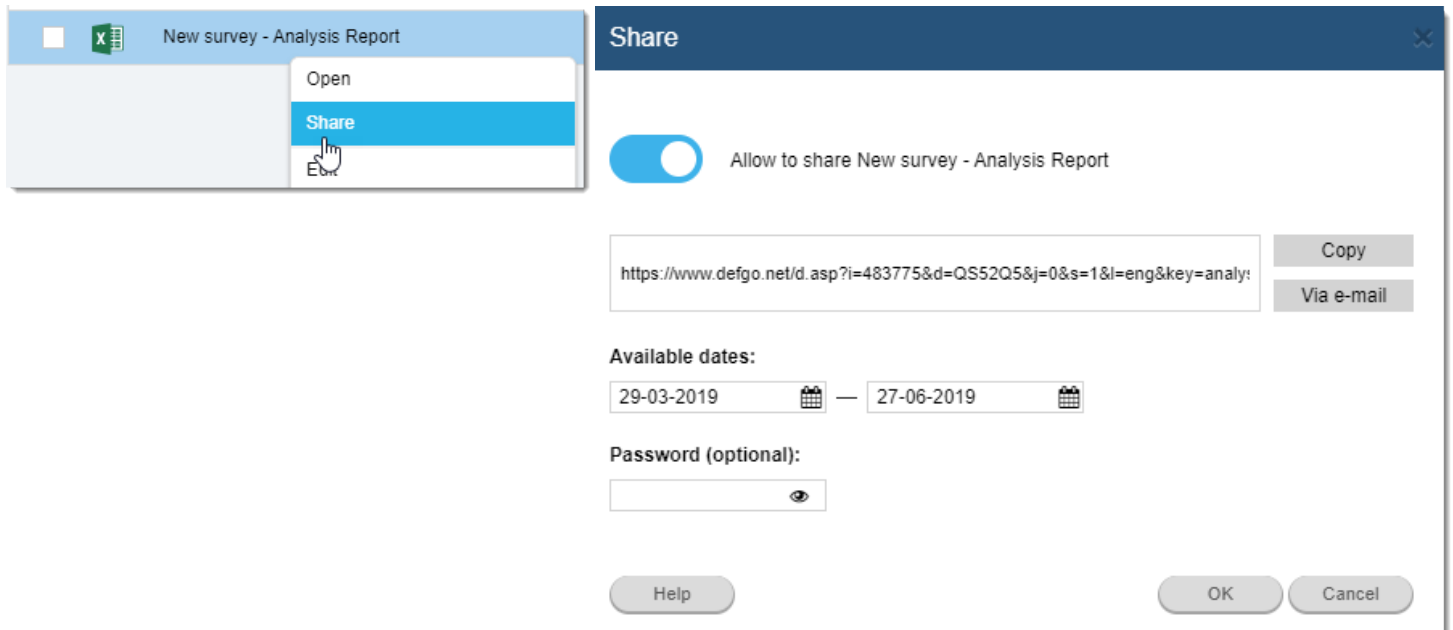


3. Share report

You can create a link to a report and send this link to those who need access to the report.

Click on the report and select **Share**.

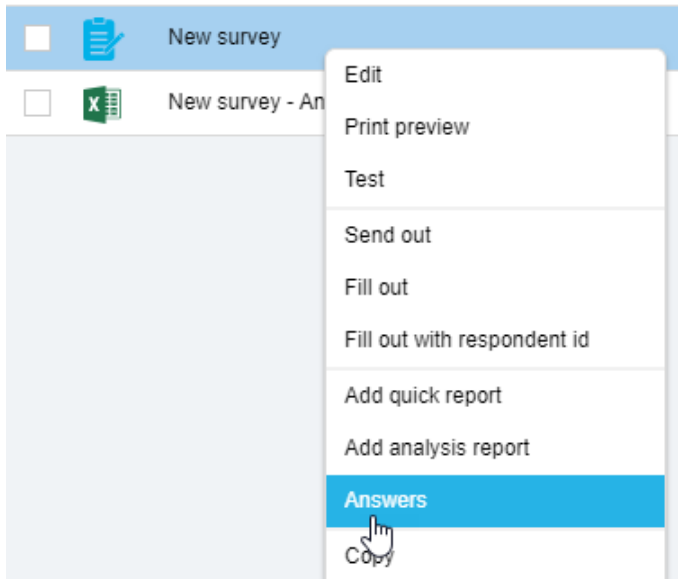
The link can be sent via an e-mail or it can be placed on an intranet, where many people can get access to a currently updated version of the report.



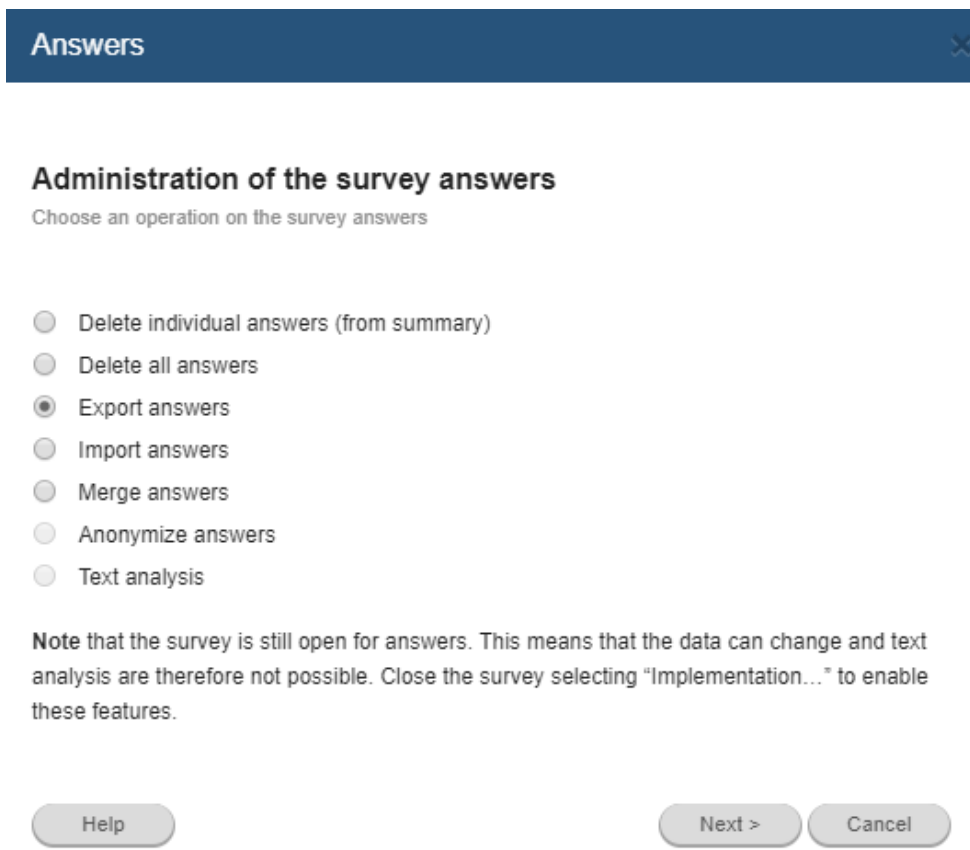
4. Excel export

4.1 An excel export put all responses in a spreadsheet: one line for each respondent.

Click on the survey and select **Answers**.



4.2 Select **Export answers** and **Excel**.



Export answers

Select the format for the exported data

- Summary of answers (answered/not answered)
- ASCII, fixed width (triple-s)
- ASCII, custom separated (delimited)
- defgo panel
- Excel
- SAS
- SPSS
- Survey (export answers to another survey)
- Web service (auto export)
- Web service (export on demand)
- Press here if you want to use a filter

Help

< Back

Next >

Cancel

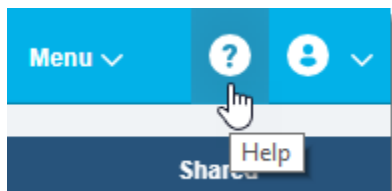
4.3 The Excel export provides a row of all response data (incl. panel data) for each respondent.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Session ID	User ID	Group ID	Period	Date	Q1 W	Q1 x	Q2 1	Q2 2	Q2 3	Q2 4	Q2 5	Q2 6	Q2 7	Q2 8
2	113541290	1			29-03-2019	2		4	4	4	4	4	4	4	4
3	113541291	2			29-03-2019	4		4	5	4	6	4	6	4	5
4	113541292	4			29-03-2019	5		4	3	2	3	4	3	2	4
5	113541295	5			29-03-2019	4		4	4	4	4	4	4	4	4
6	113541296	6			29-03-2019	4		4	4	4	5	5	5	5	5
7	113541297	7			29-03-2019	4		4	5	4	2	4	4	3	4
8	113541297	8			29-03-2019	4		4	4	4	4	5	5	5	5
9	113541299	9			29-03-2019	2		5	4	4	3	4	5	6	5
10	113541300	10			29-03-2019	1		4	4	4	5	5	5	4	4
11	113541303	3			29-03-2019	2		4	5	5	4	4	5	5	5

VI Support

1. defgos online-manual

1.1 Click on **Help** icon on the top right corner.



1.2 In the online manual there is a Search function, which will help you to find the needed questions.

2. Support

defgo support is a part of the license agreement.

Open Monday to Thursday 8.30 am to 4 pm, Friday 8.30 am to 3 pm.

Phone: +45 888 21 889

E-mail: support@defgo.dk

You can also find phone number and e-mail address on dashboard of your defgo account.

Support can especially help with technical issues.