Enterprise Experience Theme

Migrating to the Enterprise Experience Theme does **not** affect pricing or plan level features.

The enterprise Experience Theme provides an optimal user experience for the platform. By switching to the *Enterprise Experience*, one has the best and most accessible view to the features and functionality that the platform provides. Below explores the navigational aspects of the new look and feel for the application and how to

88								
ж,	Audience							
Ø	Design Library	-	Create a Survey	>			Sort By - Filter - Sea	rch C
8	Research Library	-	All Surveys	(551)				
С	Integrations	-	In HR	(7)		☆ Experience New Last Edited: Jul 23, 2020 10:53 am		lmin. 1 Guestions
۲	Account	-	III IT	(3)		Lase Lonies Jul 23, 2020 10:53 am	- ingen some singer some	
Q	Support Center					☆ Master/Benchmark Survey LIVE		lmin 3
ф	University	0	Trash Archived	(8)		New Last Edited: Jul 9, 2020 5:40 pm		ength Questions
0	Security	-	New Folder					
			al. Survey Quotas		0	Customer service experience Last Response: Jul 8, 2020 2:16 pm		3.00 Per day Completion Rate
						☆ Customer Vacation Experience		1.00 100%

find what one needs to build out projects, surveys, workflows, and much more!

Note: Moving to the Enterprise Experience theme **does not** affect survey functionality or the respondent experience when working through projects.

To switch to the Enterprise Experience, select **Account > Summary > Defaults,** then click the Enterprise Experience theme!

Non admin users are able to switch their Account Theme by Selecting in the top right **Account > My Preferences > Enterprise Experience.**

When one first logs into the platform when utilizing the Enterprise Experience Theme, one is shown the below display of the application:

	-		Projects				Help 🔗
88	Projects						
Ř	Audience		_	_			Sort By - Filter - Search Q
Ø	Design Library	-	Create a Survey	>			JUIL BY* PILLET* JeanChi C
8	Research Library		All Surveys Recent	(551) (5)			1
Ç	Integrations	•	HR	(7)		Comparison	Fatigue Score Accessibility Length Questions
¢	Account	-	 IT Learning Management 	(3)			
⇔ ₽	Support Center University	Ø	Trash	(8) (1)	•	☆ Master/Benchmark Survey LIVE New Last Edited: Jul 9, 2020 5:40 pm	Fatigue Score Accessibility 1min. 3 Accessibility Length Questions
0	Security	•	B New Folder		•	☆ Customer service experience Active Last Response: Jul 8, 2020 2:16 pm	25 13.00 Avg per day Completion Rate
						☆ Customer Vacation Experience Closed Last Response: Jul 7, 2020 5:56 pm	8 8.00 Responses Avg per day Completion Rate

Projects

The Left Navigation Menu on the far left side of the screen allows users to access various sections of the application. When one logs in, the *Projects* section displays by default. Within the Projects Section, created Projects are listed down the center of the screen while folders, the trash bin, survey quotas, and recently created projects are shown below the **Create a Survey** button. At the bottom of the Projects section, users can **Download Survey List** of all projects in the account, and paginate through all the previously created projects as well:



Audience

The **Audience Section** allows users to upload files of contacts into the application to expedite ones Email Campaigns and SMS Campaigns. Selecting **Create New List** allows one to upload a CSV, XLS, or XLSX of contacts that are later used when adding contacts to Email and SMS Campaigns:

	-		,	Audience				
88	Projects		Г	Create New List		search		٩
	Audience		1	List Name	Last Modified	Total Members	Segments	
	Design Library Research Library	Ţ		Learning and Development Team	15 Minutes Ago	1	0	×
-	Integrations	÷		Learning and Technology	12 Minutes Ago	1	0	×
\$		•					Manage	Custom Fields
\heartsuit	Support Center							

Once a spreadsheet is uploaded into the *Audience* section, match the columns of the file to the contact fields for simple reporting:

Column Header	First Row of Data	Field that it maps to in
Email		(Skip)
First Name		(Skip)
Last Name		(Skip)
Job Title	Technical Writer	(Skip)

Selecting **Manage Custom Fields** provides a popup window on the right side of the screen where one can add specific fields to map columns of an uploaded spreadsheet to. Once all the desired fields have been added, select Save Fields at the bottom right of the popup window:

Audience	Custom Fields	
Create New List	Custom Field Name	Field Type
List Name 🔺	Job Titles	Text Add New Field
Learning and Development Team		
Learning and Technology		
Technology		
Technology		
•		
		Never Mind Save Fields

To utilize created Audience lists, **Select a List** when adding Contacts to a campaign:



Design Library

The Design Library Section is home to several pages that affect the overall display of the projects in an account. By Selecting the Design Library, a dropdown menu displays a few options to choose from:



Files

The Files Page is where one can store images and other file types to use in projects, email messages, etc. To upload a file or document click **Add Files > Choose Files:**

Design Library > F	iles						Help
😂 All Files		Add Files			search	٩	
New Folder		Preview	Name	File Name	File Type		
	ħ		BBruins	Bruins.png	Image	Edit 🗙	
			Sillhoutte	Silhouette.png	Image	Edit 🛪	

Select the Files one would like to upload. Each file selected for upload allows one to provide a **Title** as well as a **Caption:**

Title Title Caption Caption Caption Caption	
Caption This will serve as the image's alt attribute (Learn more about accessibility).	
This will serve as the image's alt attribute (Learn more about accessibility).	
Caption	

Once a file is added, Select the **Edit** option to the far right of a file to make changes to the **Title** or **Caption,** as well as pull the **Files URL** or the **Embed Code:**

File URL:	
//	3.amazonaws.com/library/
Embed Code:	

Click the red ${\bf X}$ to delete a file from the library.

On the left hand side of the Files page, create Folders to organize files. Select **New Folder** to add subsections of files on the files page:

Help						Design Library > Files
	٩	search			Add Files	😂 All Files
		ile Type	File Name	Name	Preview	New Folder
	Edit 🗙	nage				

- **1.** Once a folder is created, drag and drop files to start organizing the File Library.
- 2. The last viewed folder will be saved for your next login.

Using Files in Your Surveys

Images uploaded to your library are available to select on the options tab of an Image Element. Click on

the image icon and you will be prompted to choose file from the File Library.

One can also select images from your File Library to add as answer options in Image Select questions. Click on the image icon within the **Multiple Choice Options** section:

Multiple Choice Options		Advanced Option Settings
	OPTION	
	Option 1	Ø 1 ×
+ Click to Add Option Paste in Options		

Using your File URLs and Embed Codes to Insert Files

For each of the files in the File Library there is a URL and an embed code available to allow users to easily access these files elsewhere in Projects.

- File URL This will provide you the source URL link
- Embed Code This link includes an HTML Image Source tag () so you can easily copy and

paste in your survey or in the theme of your survey

For example, when designing a survey one may want to include a list of definitions or other reference material for your respondents to review. But a wall of text can be intimidating for respondents and, once the respondent navigates away from the page, they won't have the material there for reference. Linking to a document hosted on the SurveyGizmo File Library is an excellent solution!

Survey Themes

The Survey Themes page allows users to utilize pre built project themes as well as create custom ones that fit the needs of their projects and organization. The Survey Themes page looks like this:

_	Design Library > Surv	ey Themes			Help 🔗
Projects	All Themes	New Theme		(search Q)	
Audience	New Folder	Preview	Name		
Design Library ^			My New Theme	ж (S	
Survey Themes Report Themes		Providence Marcola Control Control Marcola Control C	Custom Theme Free-Esque	ද ා x	
Research Library 👻					
이 Integrations 구		Revealance: The Cardio View Control of Cont	Custom Theme Free-Esque	ମ୍ବ ×	

Select **New Theme** to create a new style to use for projects. Selecting the New Theme button brings one to a style screen like what is found under the **style tab** when building out new projects:

Survey Theme / My New Theme	
LOGO No Image	Theme Preview
BACKGROUND	Basic Question Types
PAGE	This is the page description. It shows up on themes which use the page description merge code. Note: This sample survey has multiple pages; to see how Save and Continue looks, go to page 2.
HEADER	1. What do you call a fly with no wings? First Guess:
BUTTON/ACCENT	Second Guess:
TEXT	Third Guess:
	2. When is your birthday?
	3. On a scale of good to bad, how do you feel today? Awesome! Great Fine Meh Horrible
	Good O O Bad

For more information on how specifically to make changes to the style of a theme, refer to our Styling Documentation.

Once one has created several custom themes, you may want to start organizing your theme library. You can create folders simply by clicking **New Folder**. Then drag and drop your themes to start organizing your library.

😂 All Themes	New Theme		(search Q)
Learning and Development	Preview	Name	
New Folder	March Hold Ma	My New Theme	දට x
	Nonconstant Sector Sect	My New Theme	신 X

Report Themes

Wouldn't it be nice to save this work to apply to later shared reports? Good news! You can!

Standard Reports

Report Themes allow one to create universal themes that are then applied to your reports. These are best used when one is branding a report to fit organizational needs as a whole! To create a new theme, select **Add Theme** at the top of the Report themes page:

Design Library > Rep	port Themes			Help 🤗
All Themes	Add Theme	searc	ch Q	
New Folder	Preview	Name		
		TEST TEST	ମ୍ବା ×	
		My New Report Theme	<i>C</i>) x	

Once you've created several custom themes you may want to start organizing your theme library. You can create folders simply by clicking **New Folder.** Then drag and drop your themes to start organizing your library:

Design Library > Report	Themes	🌞 Working		Help 🔗
🖨 All Themes	Add Theme	search	٩	
Customer experience	Preview	Name		
New Folder		My New Report Theme	(2) N	
	Mar and Mar and Mar and Mar	Customer Experience	ণ্ড 🗙	

For more information on building a custom theme, check out our documentation here.

Research Library

The Research Library Section hosts several pages that are utilized to expedite project builds. The Research Library is host to **Global Questions, Custom Reports, Custom Questions,** as well as **R Scripts:**



Global Questions

Save oneself some time by adding questions, groups of questions and pages to Global Questions to reuse in later surveys. Questions from the Global questions are shared between all users that can build or edit your surveys.

There are three options for getting content into your Question Library:

• **Option 1:** When on the Build tab of a survey you have the option to Save Question/Page/Element to the Global Questions. Jump to these instructions.

- **Option 2:** You can create new survey pages and/or questions within the Global Questions. Jump to these instructions.
- **Option 3:** If you already have your survey pages and/or questions built out in a survey, you can import these questions and/or pages to the Question Library. Jump to these instructions.

The Global Questions page looks like this:

Audience Name Type Questions Lat Edited • Design Library All Questions TST Page(a) Question Questions Ques		-		Research Library > Glo	bal Que	stions				
A Columba Image:	EE Proje	ects		Create a Library Element	>	==			Columns - Filter - Search	h Q
Design Ubrary Image: September 1 Oct 7, 2019 1.42 pm Oct 7, 2019 1.42 pm	은 Audi	ence		All Questions	(11)	Name	Туре	Questions	Last Edited 🗸	
Research Library New Folder Offine mode recording Question 1 Oct 7, 2019 1.42 pm 1 0 1 Global Questions RADIO BUTTON DEPORT Question 1 Sep 4, 2019 7.53 pm 1 0 0 4 0 <th>🛃 Desig</th> <td>gn Library</td> <td>-</td> <td>Archived</td> <td></td> <td>TEST</td> <td>Page(s)</td> <td>2</td> <td>Dec 4, 2019 2:42 pm</td> <td>☆ @ ⊖ ¥</td>	🛃 Desig	gn Library	-	Archived		TEST	Page(s)	2	Dec 4, 2019 2:42 pm	☆ @ ⊖ ¥
Clobal Questions Coust on Reports Question 1 Sep 4.2019 7.53 pm Q Q Question Question <tdq< td=""><th></th><td></td><td></td><td>New Folder</td><td></td><td>Ofline mode recording</td><td>Question</td><td>1</td><td>Oct 7, 2019 1:42 pm</td><td>☆ 앱 🗢 🗙</td></tdq<>				New Folder		Ofline mode recording	Question	1	Oct 7, 2019 1:42 pm	☆ 앱 🗢 🗙
New Ubary Element Page64 1 Jul 28, 2019 P31 pm 12 C 1 Custom Reports New Ubary Element Page64 0 Apr7, 2019 627 pm 1/2 C 1 Custom Reports LOGIC LIBRARY TEST Page64 0 Apr7, 2019 627 pm 1/2 C 1 R Scripts LOGIC LIBRARY TEST Page64 0 Jul 32, 2018 1:14 pm 1/2 C 1 Integrations Integrations Page64 0 Jun 11, 2018 5:55 pm 1/2 C 1 Account Copy of New Ubrary Element Question 0 Apr11, 2018 3:01 pm 1/2 C 1 New Ubrary Element Question 0 Apr11, 2018 3:01 pm 1/2 C 1 1/2 C	_					RADIO BUTTON EXPORT	Question	1	Sep 4, 2019 7:53 pm	☆ 산 🗢 🗙
Custom Questions Could all all all all all all all all all a	Glob	Custom Reports			New Library Element	Page(s)	1	Jul 28, 2019 9:51 pm	☆ ৫ ● ¥	
R Scripts ddadas Pagetál 0 Jun 11, 2018 555 pm $\widehat{x} \in 0$ \widehat{x} Integrations Pagetál 4 April 1, 2018 321 pm $\widehat{x} < 0$ \widehat{x} 3 Account Question 0 April 1, 2018 301 pm $\widehat{x} < 0$ \widehat{x} New Ubrary Element Question 0 April 1, 2018 325 pm $\widehat{x} < 0$ \widehat{x}	Cust				New Library Element	Page(s)	0	Apr 7, 2019 6:27 pm	☆ @ ● ★	
R Scripts Page(s) 4 Apr 11, 2018 3.21 pm \$\frac{1}{2}\$ @ \$\mathbf{x}\$ * Integrations • Copy of New Library Element Question 0 Apr 11, 2018 3.01 pm \$\frac{1}{2}\$ @ \$\mathbf{x}\$ 3 Account • • Mew Library Element Question 0 Apr 11, 2018 3.01 pm \$\frac{1}{2}\$ @ \$\mathbf{x}\$	Cust				LOGIC LIBRARY TEST	Page(s)	7	Jul 3, 2018 1:14 pm	☆ @ ● ¥	
Integrations Copy of New Library Element Question 0 Apr 11, 2018 3.01 pm ☆ ⊘ ● x Account • Ø New Library Element Question 0 Apr 11, 2018 3.01 pm ☆ ⊘ ● x	R Scr	ripts				ddadas	Page(s)	0	Jun 11, 2018 5:55 pm	☆ @ ● ×
Account • C Account • C New Library Element Question 0 Apr 11, 2018 301 pm 120 0 ×	C ¹ Integ	rations	-				Page(s)	4	Apr 11, 2018 3:21 pm	☆ 앱 🗢 🗙
New Ubrary Element Question 0 Apr 11, 2018 2:52 pm 🛱 🖄 🗰						copy of New Library Element	Question	0	Apr 11, 2018 3:01 pm	☆ 앱 ● ¥
Support Center SG TEST Page(s) 4 Apr 11, 2018 2:45 pm ☆ (2) ● x	€ G} Acco	unt	- 0			New Library Element	Question	0	Apr 11, 2018 2:52 pm	☆ @ ● ×
	💭 Supp	oort Center				SG TEST	Page(s)	4	Apr 11, 2018 2:45 pm	☆ @ • ×
) Security -	Secu	rity	.							

One can create a question to be used globally by selecting the **Create Library Element** button in the top left as seen above.

Once there are several elements in your Global Questions you might want to start organizing these. You can create folders simply by clicking **New Folder**. Then drag and drop your questions to start organizing:

reate a Library Element	>	
All Questions	(11	.)
Archived New Folder		
	All Questions	All Questions (11 Archived

Custom Reports

The Custom Reports Page allows users to create unique reporting elements for their projects. To create a customized report, select the **New Report** button at the top left of the Custom Reports Page:

New Report search Q Report Name Status Available Learning and development In Design Private X	Research Library > Custom Reports				Help
	New Report		search	٩	
Learning and development In Design Private X	Report Name	Status	Available		
	Learning and development	In Design	Private	×	

This displays a popup window to the right of the screen. Provide information about the report on the first tab, including the status of the reporting element, as well as the sharing status as well. Upload an XML document as needed for each use case.

About Layout Script CSS/JS Settings Report Name Learning and development	♥ Need Help
Learning and development	
• Current Version	
1	
Icon URL	
Description	
Learning and development	
Status	
Active	•
Sharing	
Private	•

Navigate across the popup window menu at the top to provide changes to the layout, add question scripting, Custom CSS/JavaScript, and other XML Settings:



Custom Questions

Custom questions allows users to build their own questions from scratch using scripting. Create a custom question by selecting the **New Question** button at the top left the **custom questions page:**

Research Library > Custom Questions			Help 🔗
New Question	(search Status	٩	
New Custom question	In Design	×	

For assistance creating **Custom Questions,** refer to the Scripting Documentation for Custom Question Builder.

R Scripts

R is a programming language for statistical computing and graphics. It's used by statisticians, institutional researchers, and data scientists (among others) for modeling and visualizations.

Use R scripts in SurveyGizmo's Standard Report. The script output can be in the form of:

- Tables
- Text
- Charts
- Custom Visualizations

All rendered in real time!

Select Create a Script to start building out a custom R script:

	-	Research Library > R Scripts	Help	8
88	Projects	Create a Script Sort By - Search Q		
ŝ	Audience			
Ø	Design Library 👻			
₿	Research Library			
	Global Questions	Whoops, no R scripts match your criteria.		
	Custom Reports	"If you don't have a goal, you will score zero even if you run with the fastest speed." — Israelmore Aylvor		
	Custom Questions			
	R Scripts			
S	Integrations 👻			

Refer to our R Scripts documentation for more information how to create and utilize them in your projects!

Integrations

The Integrations Section hosts Data Connectors, Custom Domains, Website Intercept, and Webhooks:



Data Connectors

The **Data connectors page** allows one to plug our platform into existing online tools and social networks to eliminate redundancy and automate daily processes. Below are links to our specific documentations on each data connector:

- Social Medial Publishing
- Stripe
- Slack
- Private Domain/Embed Recaptchas
- Google Sheets
- API Access
- Login/Password Action
- Review Action

- Quiz Score Action
- Webhook
- Salesforce Marketing Cloud
- MailChimp
- R-Scripts
- SPSS Export
- Custom Question API
- Custom Scripting
- Website Intercept
- LMS/LRS Integration
- SSO Users
- SSO Respondents
- Salesforce
- HubSpot
- Tableau
- Custom Email Settings
- Microsoft Dynamics
- Video Feedback
- Microsoft Power BI

Custom Domains

The Custom Domains page allows one to create both private domains and Secure Private domains that then are applied to project Share links. Create a private and secure private domains by selecting the **New Domain** Button at the top left of the page under **Manage Domains**:

	-	Integrations > Custom Domains					Help	٩
	Projects Audience	Manage Domains New Domain						
Ø	Design Library 👻	Domains	SSL Cert Status	SSL Cert Date Submitted	SSL Valid Until			
8	Research Library -		n/a			×		
Ĉ	Integrations *							
	Data Connectors							
	Custom Domains							

Once selected, choose Create Branded Sub Domain or Create Private Domain depending on the use case. Follow the aforementioned links for assistance in configuring each option.

Website Intercept

Ever been browsing a business website, when after three or four pages of browsing, a survey pops up to asking about the experience using the site? That is what we call a **Website Intercept** and our platform has this functionality built in! It allows one to target visitors with content that can drive conversions or engagement through feedback surveys.

Create a New Website Intercept by selecting **New Beacon** in the top left of the Website Intercept Page:

EB Projects	
Audience Beacon Name Date Created Created By	
Design Library	×
E Research Library	×
C ² Integrations *	
Data Connectors	
Custom Domains	
Website Intercept	

Selecting the **New Beacon button** displays a popup to the right of the screen:

	-		Integrations > Website Intercept		Edit Beacon
88	Projects		New Beacon		Beacon Name
õ	Audience		Beacon Name	Date Crea	
Ø	Design Library	-		2 Years Age	Domains of the sites you are installing the Beacon my-site.com
8	Research Library	•		2 Years Age	Leave blank to allow the beacon to be installed on any site or enter a comma separated list of domains to allow the beacon only on those sites.
Ç	Integrations	•			Beacon Status Active
	Data Connectors				O Disabled
	Custom Domains				Embed Code
	Website Intercept				the second se
	Webhooks				
ŵ	Account	- 🕜			
© ₽	Support Center	Ĭ			Paste this code just before the «/body> tag on all pages in your site that you want tracking.
Φ	University				
0	Security	•			
					Never Mind Save

For more information on how to create Website intercepts, follow the documentation guide here.

Webhooks

Webhooks allow users to communicate with external web pages via the HTTP POST or HTTP GET standards at the account level. Users can utilize the Webhook Action to pull data into a survey response and/or send survey response data to an external database. the Webhooks Page displays several areas where one populates URL's to complete several tasks, including:

- On Survey Create
- On Survey Update
- On Survey Publish
- On Survey Close
- On Response Received

For additional information on how to utilize account level Webhooks, follow the documentation here.

Account

The Account Section hosts the *Summary page, Settings Page, User Management page dropdown, Billing page,* and *Sub Accounts page*:

ŝ	Account 🔺
	Summary
	Settings
	User Management >
	Billing
	Sub Accounts

These Options are only Available for Account Administrators.

Summary

The Summary page displays several subsections that include information on the overall account, Common account actions, and FAQ's on how to manage the account as a whole. the Summary homepage will display user licenses that are in use as well as ones that are available for provisioning:

ccount > Summary					Help
Your Account 552	2/5	2		Common Account Actions Edit Contact Information Grant Support Access Add Users Delete Account Execute a DPA User Access Logs	
Surveys	Users	Years with S		Frequently Asked Questions	
User Licenses				How do I allow support access to my account? What training programs are available? How do I get technical support?	
License Type	Purchased	In Use	Available	Billing	
Collaborator	1	0	1	Can I pay per survey or form?	
Full Access	4	2	2	Where are my invoices? My receipts? What payment methods are accepted? Are Payment Orders (P.O.) accepted? Can I pay by Wire Transfer?	
Need to make changes to your account	t or add people and add-ons?				
Additional Admin Users Increase API Limits Increase Email Invitations Quota 24/7 Phone Support Seat Salesforce Integration	Single Sign O Sub Account Use Private E Website Inter	Management Jomain + SSL Cert		Suspending or Deleting your Account How do I pause billing or deleter my account? Can I change to a cheaper plan?	
			Contact Us	Technical & Accounting Documents Privacy Policy Security Information W-9 Tax Form Need a Business Associate Agreement?	

To edit contact and billing information, scroll down to the bottom of the Summary Page and select Edit:

Contact Information	Billing Information

On the right side of the *Summary page*, one can access Technical and Accounting Documents such as our Privacy Policy, W-9, and General security information:

Technical & Accounting Documents Privacy Policy Security Information W-9 Tax Form Need a Business Associate Agreement?

Settings

Settings provides Account Administrators that ability to edit their timezone, Date/time Format, Currency on the account, Default languages, and many other account specific items:

	Account > Settings		Help	8
	Time Zone	New York • Your data/time: Jul 24, 2020 6/21 pm •		
	Date/Time Formats	Dates Times 0.4124, 2020 0.421 pm (am/pm) 0.24 July 2020 0.18:21 (24 hour) 0.7/24/2020 0.24/07/7020 0.24007/7020 0.2020/07/24 0.2020-07-24 0.2020-07-24		
	Default Currency	S - US Doltar		
	Default Project Language	English		
	Force Secure (https) Links	Force all links to use https		
3	Survey File Upload Security	Only logged-in SurveyGizmo users can access uploaded respondent files		
	Private Domains Only	You don't have any private domains. Set one up here.		
	Privacy/Data Use — Checkbox Text	I consent to having my information collected and stored.		
	Privacy/Data Use - Policy Link Text	View Privacy Policy		
	Privacy/Data Use — Policy Title Text	[survey('ttitle']] Privacy Policy		
	Privacy/Data Use — Policy	TESTING TEST LINK		
		How to create your policy		

Additionally *Administrators* can set up a **default Application theme** for all users on the account. The *Settings Page* displays as seen below:

Enterprise Experience		
Enterprise Experience		
Small custom logo URL 110 x 110px square suggested	//url	
Large custom logo URL 180 x 55px suggested	//url *Small logo is required to use a large logo	
	110 x 110px square suggested	110 x 110px square suggested Large custom logo URL //url

User Management

The User Management Dropdown allows users to make changes to users on the account as well as assign licenses to users:

License Type			Purchased	In Use	Available	
Collaborator			1	0	1	
Full Access			4	2	2	
Username	Status	Email	License A	Add-ons Last Login	0 (18:14 PM) ×	
	Active				0 (18:14 PM) X	

Create and manage Teams for users on the account to reside in to limit access to particular projects:

Account > User Management > Teams				Help 🔗
Add Team		search	٩	
Team Name 🔺	Description			
Team 1				

As well as create and manage Custom Roles for their users to provide and limit particular actions:

Role Name	Description		
Editor	Has full control over projects.	2	
Publisher	Can launch, review, test, and report on projects.	2	
Reporter	Can run reports, review and test projects.	2	
Fester	Can view and test projects.	2	
No Access	Has no access to projects.	2	
IR		@ ×	

Follow the aforementioned hyperlinks for more insight into how to manage these permissions!

Billing

The Billing page displays invoices and receipts on the account, as well as the billing contact information. Use the search bar to find specific invoices as it relates to the account:

Account > Billing			Help 🙁
Billing Contact Care 4128 Madison Street Denver, CO 80216			
Invoices & Receipts	No invoices found "Mhatever makes you happy, you put in your world" – Bob Ross	(Search Q)	

Sub Accounts

If one is utilizing sub accounts, select this page to manage them by altering login information as well as users within the sub account:

	Total Active Users		Total Surveys			ctive Sub Accour	nts	
	3		8			3/10		
Create Sub	Accounts							
					Columns -	Search	0	
ID	Organization Name	Contact	Contact Email	Billing Email	Users	Usage		
123456	Boston Badgers	Nick	nick@bostonbadgers.com		1	None	Login	(MI)
654321	Sacramento Silver Foxes	Paul	paul@sacramentosilverfoxes.com		1	None	Login	an .
111111	Denver Devil Dogs	George	george@denverdevildogs.com		1	None	Login	
	Account List							

Support Center

The Support Center Section provides users the opportunity to self service when needing assistance in the application:

Search for specifics on how to complete tasks and use features by typing in the search bar across the top of the page. Select each subsection (Getting Started, Build, Style, Share & Contact, etc) to view areas of the application in a more specific view. Popular articles at the time of viewing the page will be shown across the bottom as well as New Articles that have been released by the Learning and Development team will display as well.

Platform University

Select University to navigate to the applications Learning Management System:



Follow the documentation HERE for more information how to use the learning management System!

Security

The Security Section hosts the Settings page, Access Logs Page, as well as API Access page:



These options are available for Account Administrators only.

Settings

The Settings page allows administrators to control Password settings, User Management items, Data Retention Policies, and set surveys to be anonymous:

ecurity > Settings	
Password Settings	
Expiration Interval	Default: never •
Reuse Limitations	Default: none
Password Complexity Rules	O No restrictions on passwords
	Create basic set of rules
	Create complex set of rules using regex
Additional Protection	Password cannot contain application user information
Description	Describe complexity pattern here so users know requirements.
Multi-Factor Authentication	Not Required -
	MFA can be optionally controlled by the individual user on the My Preferences screen.
User Management	
Disable Users Automatically	Disable users for inactivity,
	Disaure uses for macurity.
Data Retention Policy	
Delete Old Responses	Never automatically delete old survey responses.
	 Automatically delete all responses in this account which are older than the data retention period.
	 Automatically delete all responses on specified surveys or questions which are older than the data retention period.
Data Retention Period	Responses will only be available for this period, after which they will be permanently deleted.
	1 () Months ·
Automatic Survey Enrollment	Enable data retention policy for new surveys created by the following teams:
Automatic Survey Enrolment	Enter team name
Compliance Administrators	Users and/or teams who are allowed to enable data retention policy on a survey or question:
Anonymous Surveys	
Force Anonymous Surveys	Hide IP addresses, geo-location and invite data for all newly created surveys in this account.
	Save

Access Logs

Do you need to see what users are doing in your SurveyGizmo account? As an (https://help.surveygizmo.com/help/account-administrators)!" dataglossaryid="57eaa32291121c5e32bb82cd" data-original-title="" data-toggle="popover" href="https://help.surveygizmo.com/help/javascript%3Avoid(0);" title="">Account Administrator you can review user access logs for all activity in your account. This report includes a date and time stamp, the User ID, Username, Action, User Email, and the IP Address for all actions in your account:

					Filter - Search Q
Date (ET)	User ID	Username	Action	User Email	IP Address
07/24/2020 18:42:28			Viewed Security and Compliance settings		67.166.58.203
07/24/2020 18:38:43			Viewed sguniversity/index		67.166.58.203
07/24/2020 18:36:01			Viewed help/remote		67.166.58.203
07/24/2020 18:32:40			Viewed supportcenter/index		67.166.58.203
07/24/2020 18:30:26			Viewed subscription/permission-modal		67.166.58.203
07/24/2020 18:29:02			Viewed gridlist/invoice		67.166.58.203
07/24/2020 18:29:01			Viewed account/billing		67.166.58.203
07/24/2020 18:26:23			Viewed roles/index		67.166.58.203
07/24/2020 18:25:59			Viewed account/teams		67.166.58.203
07/24/2020 18:25:05			Viewed gridlist/user		67.166.58.203
07/24/2020 18:25:04			Viewed Account Users		67.166.58.203
07/24/2020 18:24:37			Viewed mfa/app-setup		67.166.58.203
07/24/2020 18:24:36			Viewed User : ID 821538		67.166.58.203
07/24/2020 18:24:34			Viewed gridlist/user		67.166.58.203

API Access

The API Access page allows *Account Administrators* to set up API access Rules and generate API Keys that can be used to integrate SurveyGizmo with other external connections:

	Security > API Access		Help	8
	API Access Rules	Allow API access. Do not allow any API access.		
	API Access Rules	Do not allow API GET calls. Do not allow API PUT calls. Do not allow API POST calls. Do not allow API POST calls. Do not allow API DELETE calls. Do not allow access to the API using OAUTH authentication.		
	API Keys	Date Created Status User API Key API Secret Key Jan 22, 2019 3:27 pm 1 0 X		
•		Create an API Key Save		

Refer to our API Help Page for additional information on how to manage the platforms API!

Help

The Help dropdown found in the top right of the application allows users to access help information by searching through documentation via the search bar across the top. Most commons questions based on the page being viewed shows specific articles dynamically:



Selecting **No, Show additional support options** brings users options such as documentation, Training, Community, and the support team:

			Help	8
< Back	Additional Help Options			
	Documentation Best for: Walkthroughs, how-tos, and learning the application. Search Documentation	Ø In	stant	
	Training & Webinars Best for: Hearing from the experts on all things SurveyGizmo. View Training & Webinars			
	Community Best for: Interacting with other users for best practices, networking, and questions. Browse Community	asking gen	eral	
C	Phone Support Best for: More complex questions or multiple topics. Hours: 8am - 8pm, Mon - Fri (GMT -4)	⊘ < 45	Min.	
\sim	Email / Submit a Ticket Best for: Issues that are less urgent or have lots of details.	⊘ < 48 ⊦	lours	
	Hours: All Day, Every Day Submit a Ticket			

Profile Icon

The profile icon when selected displays a dropdown containing **Profile and Settings, Your API Key, Switch Account, Support Access,** and **Log Out.**

Profile and Settings

Profile and Settings allows users to make changes to the Name, Email, and password of an account. Additionally this section allows users to turn on multi-Factor Authentication, and change the overall Application Theme:

Profile And Settings		Help	8
* Name	mike.cordeiro		
* Email	mike.cordeiro@surveygizmo.com		
Password	C Reset Password		
Multi-Factor Authentication	Enable Multi-factor Authentication To learn more about multi-factor authentication, click here.		
License Type	Full Access License		
Application Theme			
	Account Default — Use the theme that the entire account is set to (Enterprise Experience)		
	Enterprise Experience		
	O Modern		

Your API Key

This displays information as it relates to generated API Keys:

Your API Key		Help	8
Your API Key:			
Your API Secret Key:			
API Request Parameters:			
Status:	Active		
Created:	Jan 22, 2019 3:27 pm		

Switch account

If one has multiple accounts with SurveyGizmo, select this option to navigate between them:

Which account would you like to use?	
You have multiple accounts with the same email address. United States Data Center	
	Edit Account Nickname Continue

Enable Support access by accessing this page:

upport Access				
Manage	Access to Yo	ur Account		
Enabling Support Access will let re support assistance. By granting ac			n order to help with issues. This may result in respondent or o erform these actions on your data.	her sensitive information being transferred to the US for
NOTE: This does not allow for any	one except em	ployees to access your ac	ccount.	
	cess is currently enabl	ed for your account	: (ı).	Revoke Access
Acce	ss Granted Activity	Username	Email	Status
				Forever
			You can revoke a user's support access by editing that	iser from the users page.

Related Articles