



## Understanding and Using the Distribution Report

### SETTING THE SCENE...

You are responsible for designing, distributing, and reporting on a major employee engagement initiative at your organization. The results of the survey will determine the organization's hiring, management, and overall practices for the next several years. It is imperative that things go well.

You create the survey, putting enormous time and energy into its construction. You then launch the initiative and hope all goes well. As you cross your fingers, you begin to receive emails from employees with the following complaints:

- "I'm trying to do this survey, but every time I click on the link it says that I've already participated."
- "I already finished the survey yesterday, but I received a reminder today."
- "I clicked on the survey link, but the information in the survey questions isn't mine."

### WHAT HAPPENED?

Don't panic. These types of issues occur often in "Private with Unique Key" surveys (a survey that can only be taken by an individual one time, in order to prevent "ballot-box stuffing"). When issues such as these arise, turn to the Distribution Report for guidance.

**DEFINITION:** The Distribution Report is designed to help participants understand the status of their survey initiatives as it relates to participation. The Distribution Report will reveal if a participant has "Participated" (including the date & time) or "Not Participated," or whether the "Email [was] Read" (i.e. the participant opened the link, but did not complete the survey), or "Bounced."

### WHERE IS IT LOCATED?

The screenshot shows the SoGoSurvey web interface. At the top, there are navigation tabs: Home, Design a Survey, Launch a Survey, Run a Report, and Manage Survey Data. The 'Launch a Survey' tab is active. Below the navigation, there are buttons for 'Customize Invitation', 'Invite via Email', 'Offline Inv', 'Distribution Report' (highlighted with a red circle), 'Reminder', 'Remind via Email', and 'List Manager'. A table below these buttons displays survey data with columns for Survey Title, Start Date, End Date, Status, Invites, Delivered, Completed Responses, Incomplete Response, Response Rate, and Email Read. The first row shows 'Evolution survey' with 5 invites and 5 delivered, and a 40.00% response rate. Other rows show 'Personal information', 'Feedback Survey', and 'Employee satisfaction survey' with 0 invites and 0 delivered.

	Survey Title	Start Date	End Date	Status	Invites	Delivered	Completed Responses	Incomplete Response	Response Rate	Email Read
<input checked="" type="checkbox"/>	Evolution survey	4/22/10	4/21/20	Active	5	5	2	2	40.00%	80.00%
<input type="checkbox"/>	Personal information	--	--	Edt	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	Feedback Survey	--	--	Edt	0	0	0	0	0.00%	0.00%
<input type="checkbox"/>	Employee satisfaction survey	--	--	Edt	0	0	0	0	0.00%	0.00%

## HOW IS IT USED?

If a survey recipient mentions any of the complaints above, do the following:

1. Go to the Distribution Report.
2. Search for the proper email address.
3. Look in the status column to determine their status of participation.

Does it say “Not Participated”? Or, can you not find the email address at all? Don’t be confused. Just ask your participant if one (or all) of the following things could have happened:

- **Did someone forward you the survey invitation?**  
If a user forwards a “Private with Unique Key” survey that’s already been taken, then the recipient of the forwarded email will get the message that someone has already participated in this survey.
- **Did the participant forward their invite before taking the survey him/herself?**  
If the recipient of the forwarded message participates first, then the original invitee will be unable to do so.
- **Does a participant say that they received a reminder today, even though they took the survey days ago?**  
Visit the Status column of the Distribution Report. Look for the participant’s email address and note if the system indicates that they have not participated. If a participant took a forwarded survey and not the survey originally intended for him/her, then the participant will continue to receive reminders.
- **There are many responses in my survey and they are seen on different pages. How can it be seen together? Can I download the data in an Excel file?**  
Yes, you can do that. Select a Survey in the Distribution Report by clicking its check box. Then click on the ‘Export all Invites’ link. You will be asked whether you want to

open the file on your desktop or you want to save it to some specific location. You can choose any of the options and see the distribution report. It will contain details like email address (or the Unique Id, in case of Unique Id type list), Sent Date, Status, IP Address (in case the user has participated), Date and Time of participation, the Participation Key (which the user can enter to participate in the survey using the Private Survey Access Page), the complete participation URL which the user can click and participate in the survey. The Excel Sheet also contains the Opt-Out Status of the user, which will decide whether the user can be sent further reminders for current or future surveys.

- **Does the participant say the information in the survey is not their own?**

If a survey contains Pre-Population (a feature that allows survey creators to pre-fill a survey with information about the participant), and someone forwards their survey, the recipient of the forwarded survey will see the original recipient's information.

*Example: You send Amy in marketing a survey and it contains her first and last names, direct telephone extension, and her position title as the Director of Marketing. Amy forwards the survey to the Marketing Assistant, John. John then opens the survey and finds Amy's information. When John contacts you about the "mistake," ask him if he received the survey via a forwarded email.*

## REMEMBER...

The Distribution Report is a helpful tool to learn "what happened" to your survey invites. Learn it. Embrace it. Use it.