

Importing Surveys

Profiles Survey Center

This process allows a PSC user to set up one or more Checkpoint 360™ surveys by uploading a .CSV file.

The first step is to download a template that you must fill out with the names and email addresses of all the respondents that will participate in multiple surveys.

Download Template

1. Click Schedule and select Multiple Surveys.
2. Click Generate Template to download a comma-delimited (CSV) file.

Fill Out Template

When you open the template, you'll find all column headers listed in the A1 cell. You'll need to separate these so that each header is in its own column. You can do this by using the Text to Column feature in Excel.

Each row in the template represents a respondent in a survey. Each column represents a field. *If the respondent is in multiple surveys, you will need to enter their information for each survey they are in.* Each field allows a maximum of 50 characters, and the file can only have 500 rows. Be sure to save your file as a CSV when you have finished filling out the template. Below are the template column headers and a description of what data should be entered into the field.

Field Name	Description
Self Name	Required Field. Enter the first and last name of the survey's self. This value is used to associate the rows that are part of the same survey.
Respondent Type	Required Field. You'll need to enter a specific abbreviation to assign each person a respondent type for the survey. Please refer to the on-screen instructions on the Schedule > Multiple Surveys page for the list of abbreviations.
First Name	Required Field. Enter the respondent's first name.
Middle Name	Optional Field. Enter the respondent's middle name.
Last Name	Required Field. Enter the respondent's last name.
Email Address	Enter the respondent's email address to have notifications or reminders sent directly to the respondent. This is also used as a unique identifier for respondents.
Phone Number	Optional Field. Enter the respondent's phone number as a unique identifier if an email address is not used.
Language Code	Optional Field. The Language Code field can be left blank, and PSC will apply your current language to all respondents. Valid Language Code values for your account are listed on the Import Surveys page.
Optional Codes	If your account has optional codes, they are displayed as separate fields. The values of those fields should be repeated on each row with a given Self Name value.

Import the Template

1. Click Schedule and select Multiple Surveys.
2. Select the type of survey.
3. Complete the basic survey information.

Comments Collection	Select whether you want to allow the respondents to provide open comments about the "Self."
Survey Due Date	The Due Date is for email purposes only. It does not have any effect on the Respondents' links. The Administrator will also receive an email notification two days prior to the Due Date.
Owned By	Select the correct security group from the Owned By drop down. This will restrict visibility of the surveys so that only users within the Security Group can view the surveys in a list. If security groups are not used, the default setting is Admin.
Send invites to me	Select this option if you want the survey notifications to be sent to your email address versus directly to the respondents.
Email Details	<p>Template: If new email templates have been created from the Configure Email Templates section of the Profiles Survey Center, the new templates will be visible in the Template dropdowns.</p> <p>Number of Days after Activation for Notifications and Reminders: These fields allow you to determine when the system will send the specified emails. The default number of days is 0 for notifications and 7 for reminders. When 0 is entered in one of these fields, the associated email will be queued for delivery on the same day the survey is activated. <i>Note: Survey reminders cannot be disabled. You can only edit the number of days after activation for reminders.</i></p> <p>Send From: Text entered in the Send From field appears on the emails sent to respondents. The system defaults the send from text to be your first and last name, but the field is editable.</p>

4. Click **Choose file** and select your completed template.
5. Click **Import**. Your survey members will appear at the bottom of the page.
6. Scroll to the top of the page and click **Save**.
7. Resolve any conflicts with duplicate respondents.
Note: If you intend to generate CheckPoint 360™ Comparison Reports, make sure to resolve conflicts with duplicate records using the "This candidate is the same as existing candidate" option.
8. Click **Continue** for PSC to display the Manage Surveys page.
9. Activate the surveys one-by-one when you are ready to send the notifications.