Quick guide defgo

Distributed by Interresearch a|s

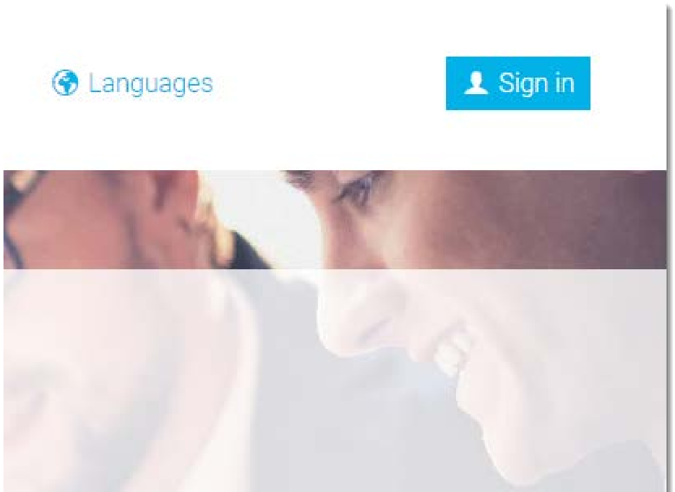
April 2019

defgo

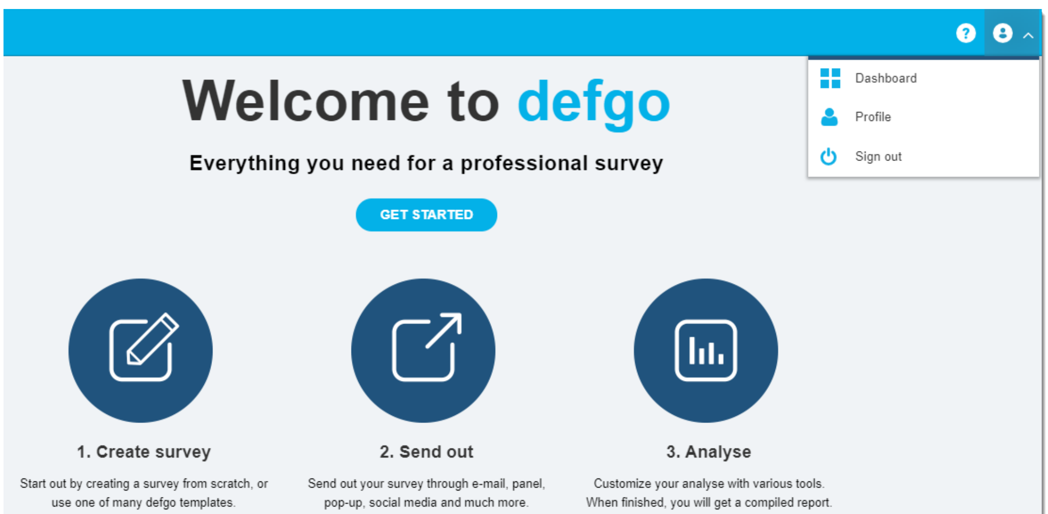
I Start

1. Start defgo.net

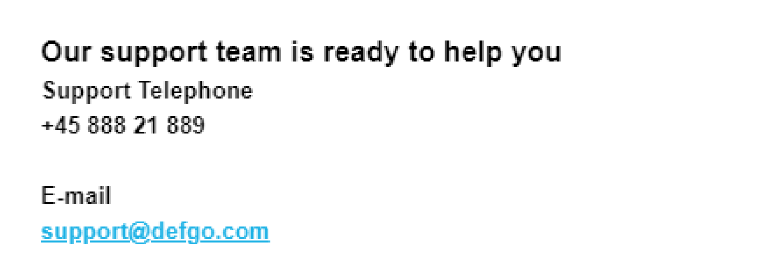
1.1 Go to the website www.defgo.com. Click on **Sign in** and then enter your **Username** and **Password**.



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

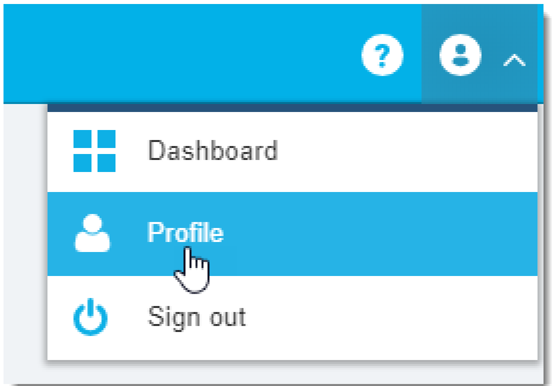


1.3 Here you will also find **Support** contact information.

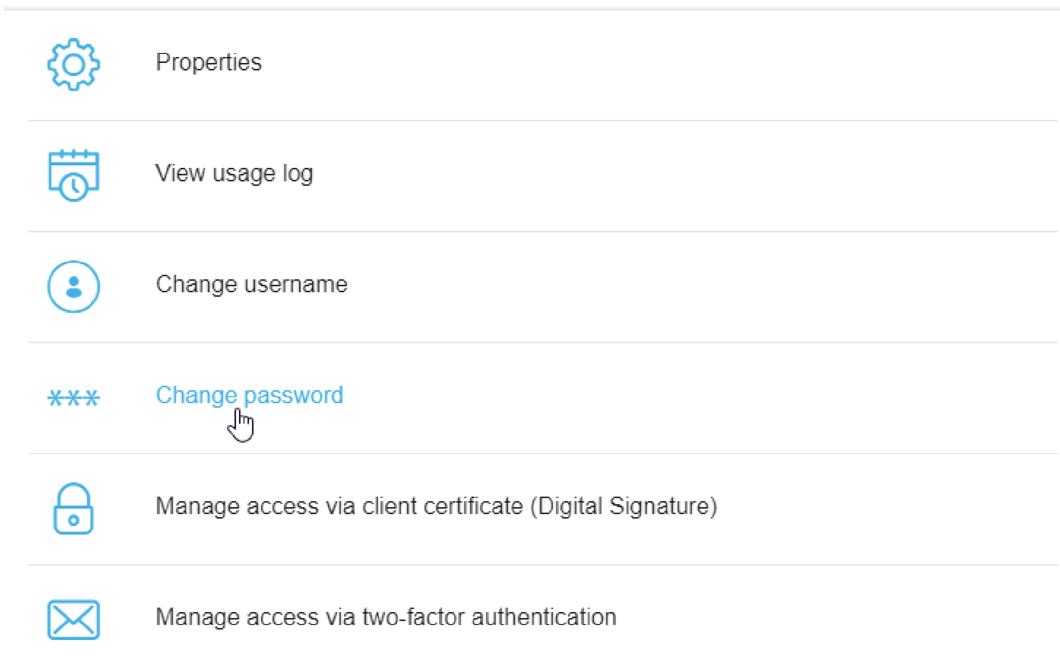


2. Change password

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



2.2 Click on **Change password.**

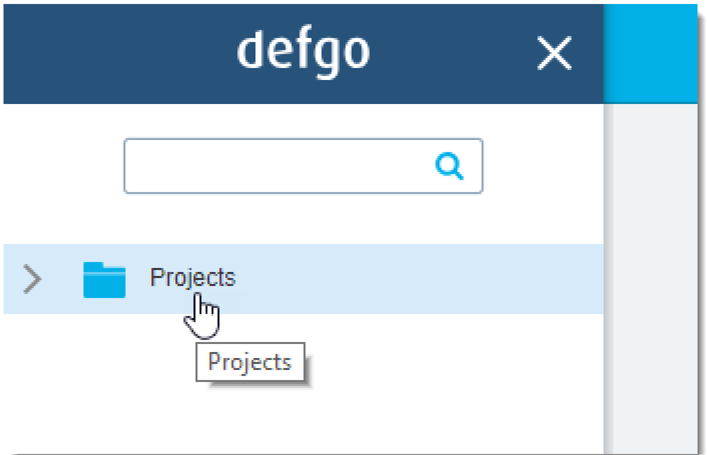


2.3 **Password** should consist of at least 8 characters and contain both letters and numbers.

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

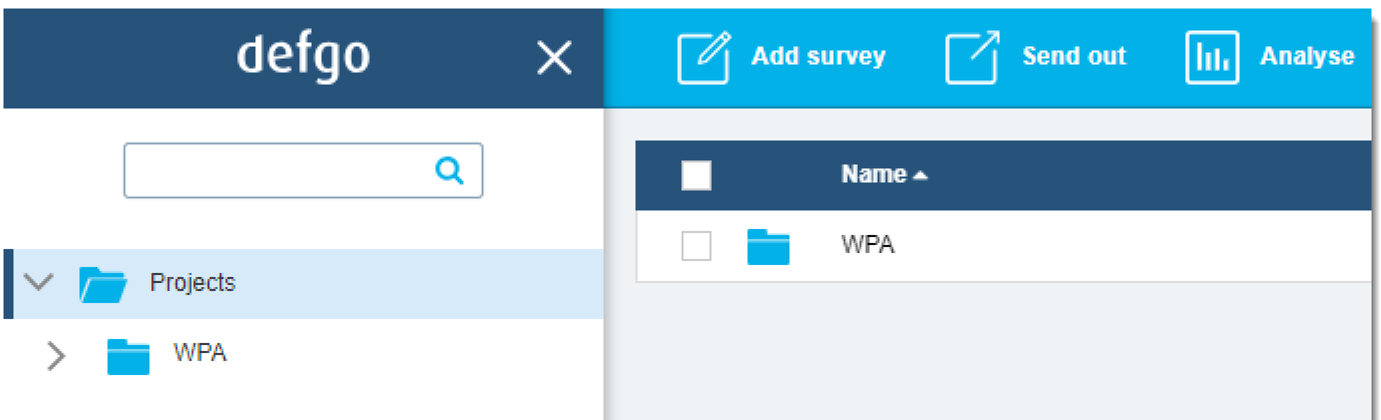
II Desktop and toolbar

Click on **Projects:**



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

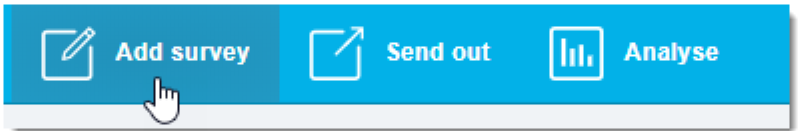
– **Add survey, Send out, Analyse.**



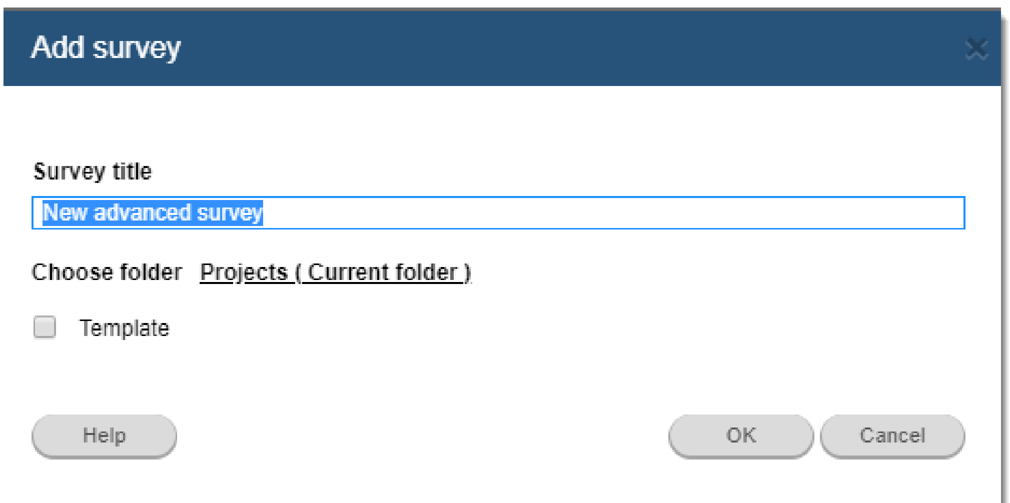
III Create survey

1. Create a new survey

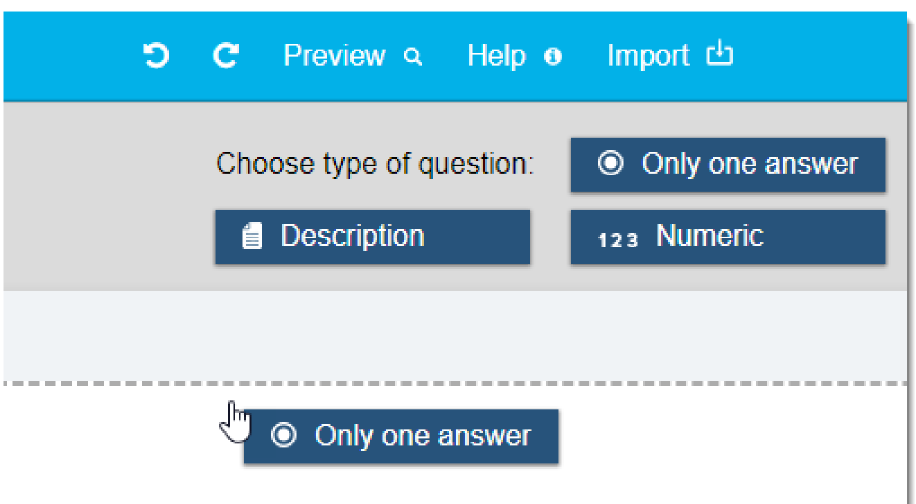
1.1 Click on **Add survey** in the top toolbar.



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).

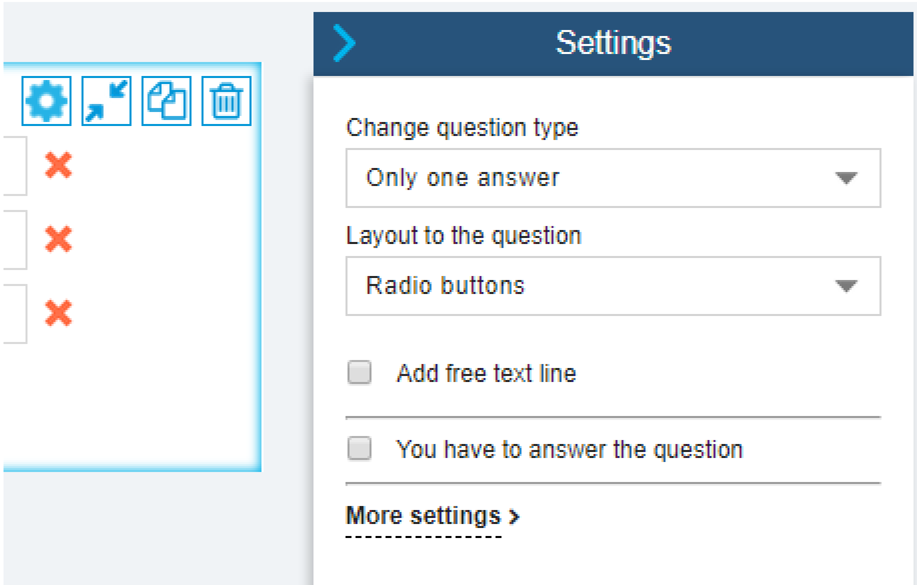


1.3 Drag and drop a question to the survey or use double click on a question.

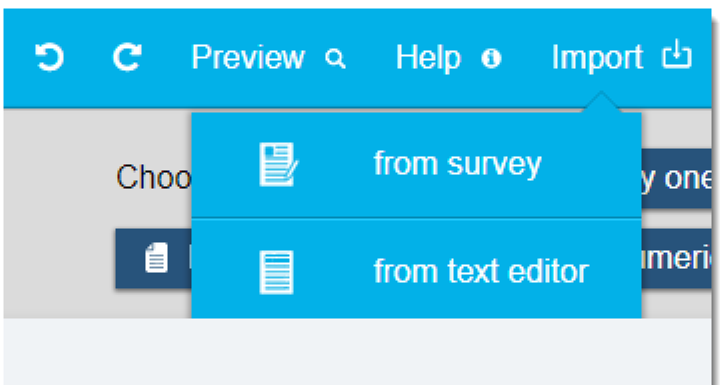


defgo

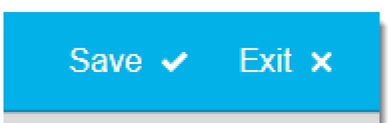
1.4 For each question you can change **Settings** in the menu to the right.



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



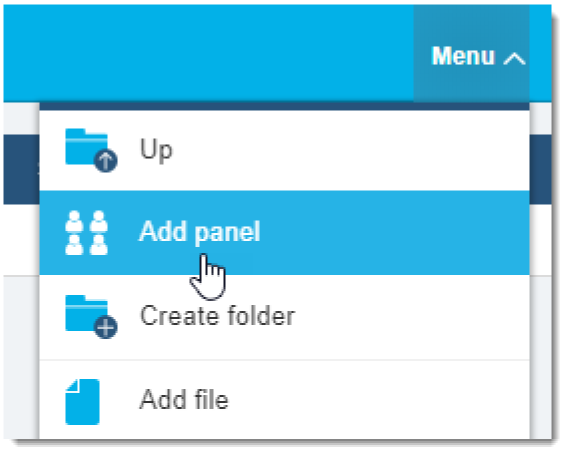
1.6 When you finished, click on **Save** and **Exit**.



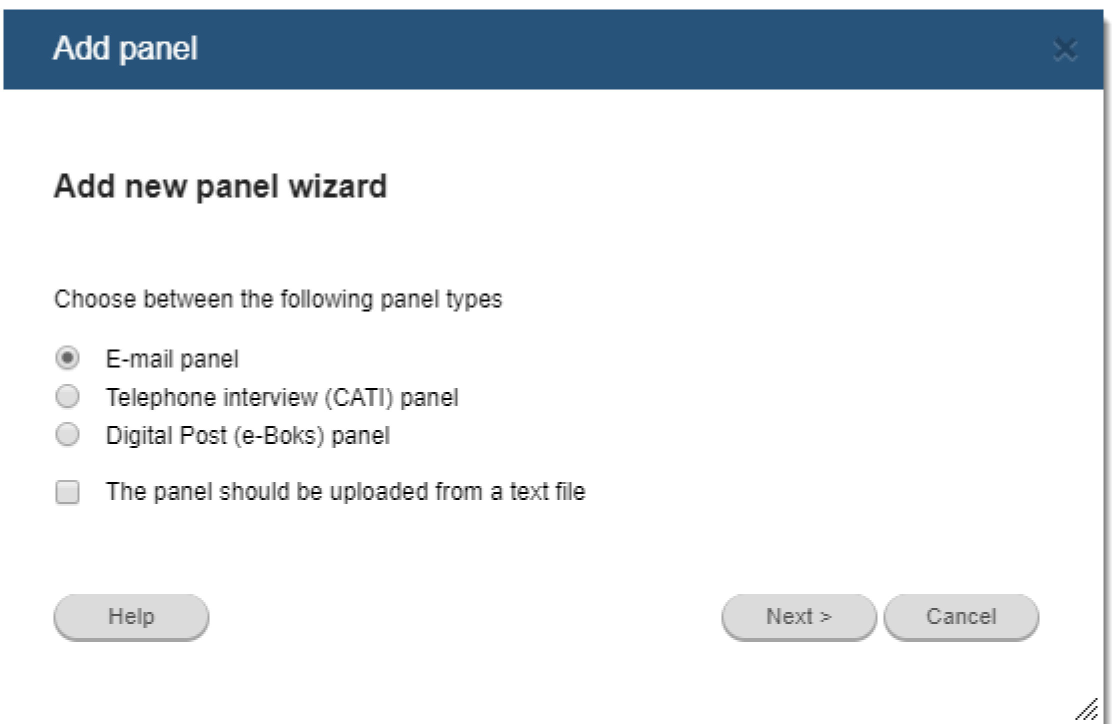
IV Create panel and send out

1. Create e-mail panel

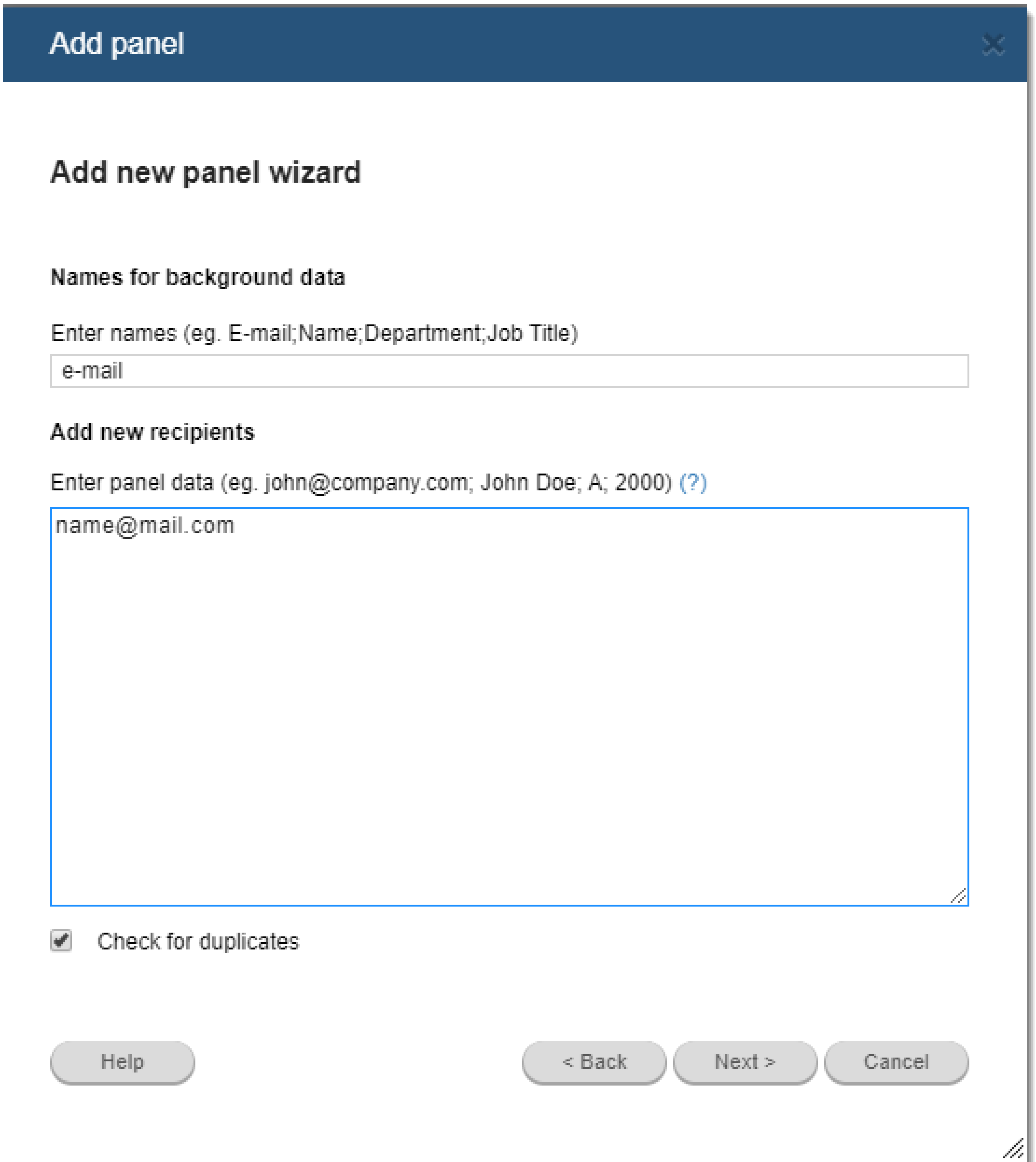
1.1 Click on **Add panel** in the dropdown menu



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



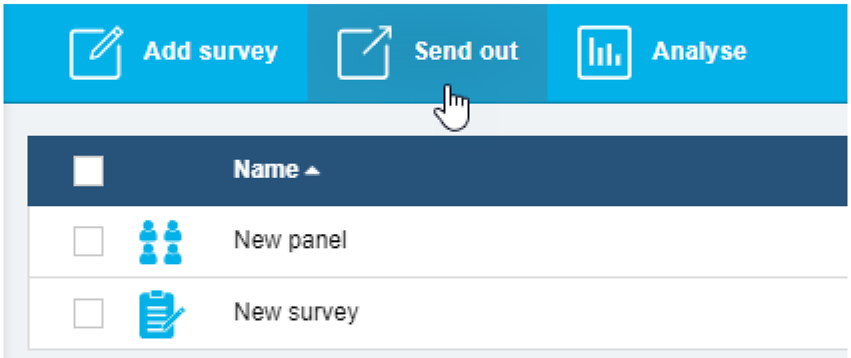
1.3 In the upper line write names for background data separated by semicolon. In the large field enter e-mail addresses and names separated by semicolon - a line for each respondent. You can also copy and past your background data from **Excel**. Click on **Next**.



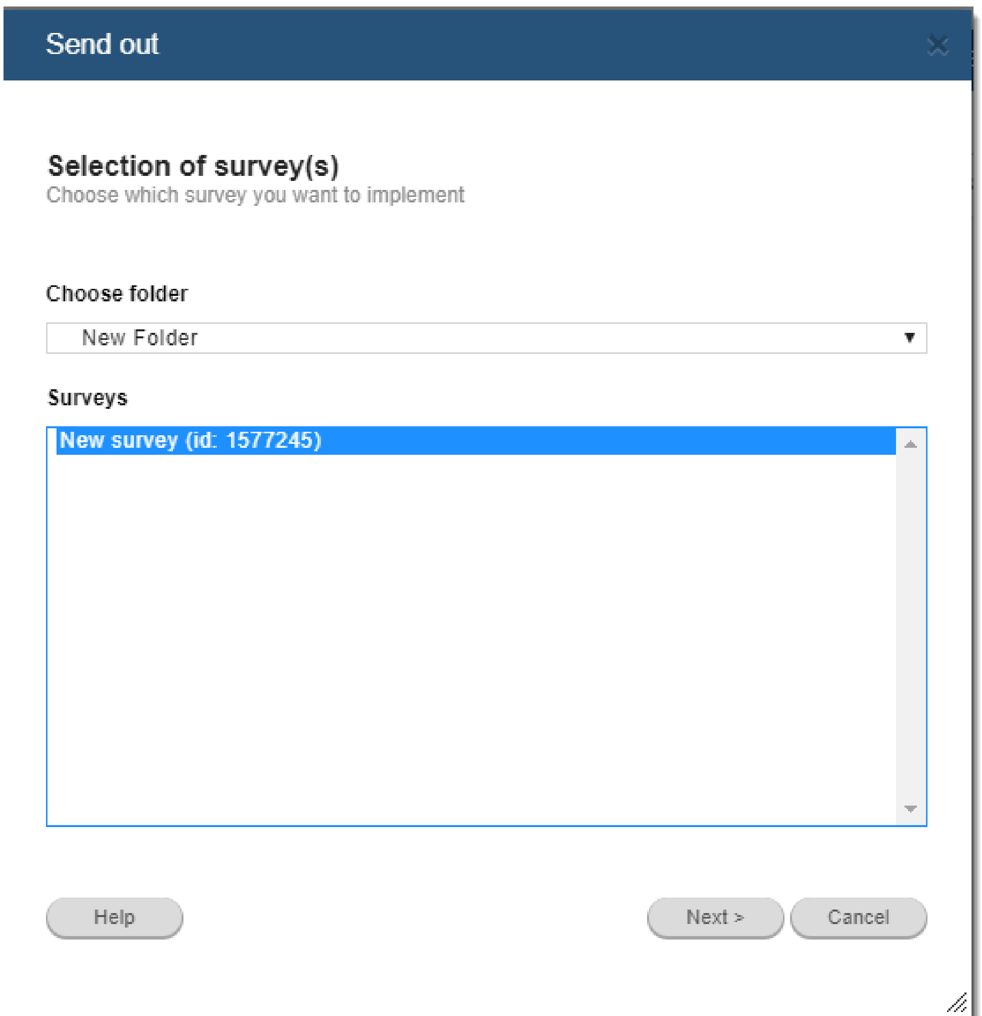
1.4 Name the panel and click on **Exit.**

2. Send out to e-mail panel

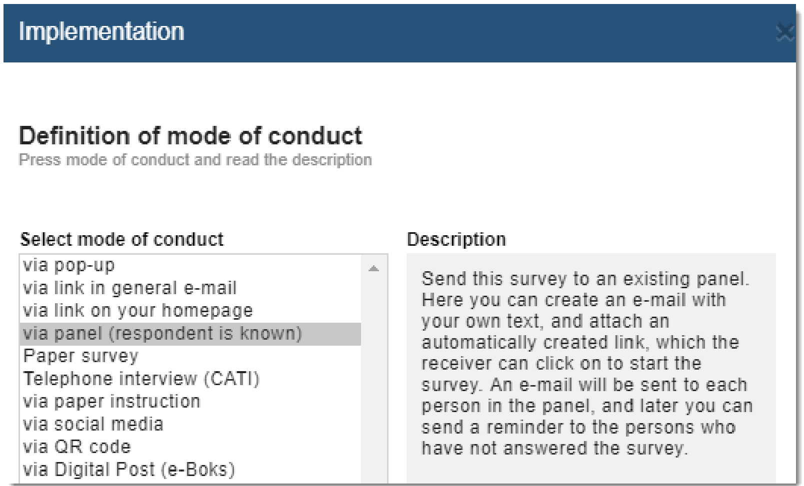
2.1 Click on **Send out** in the top toolbar.



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

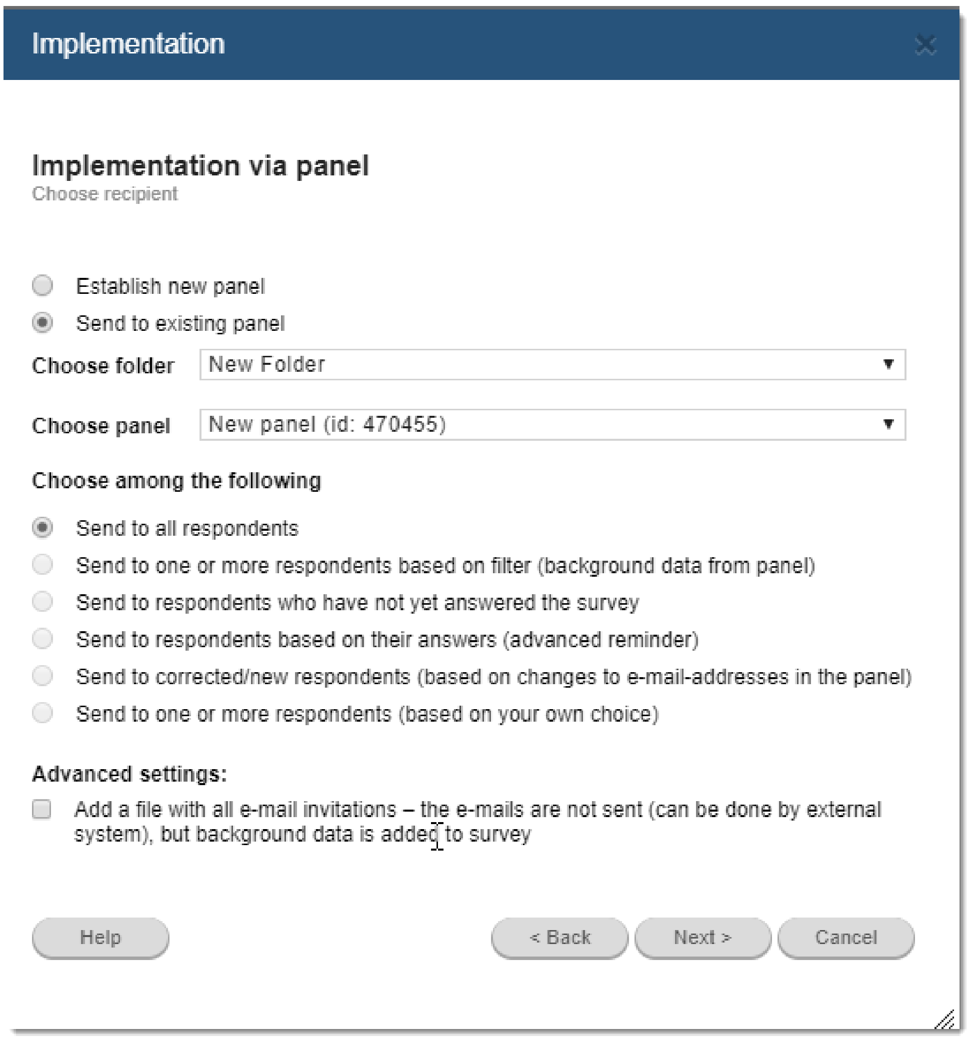


2.3 Select **Via panel** and click on **Next.**



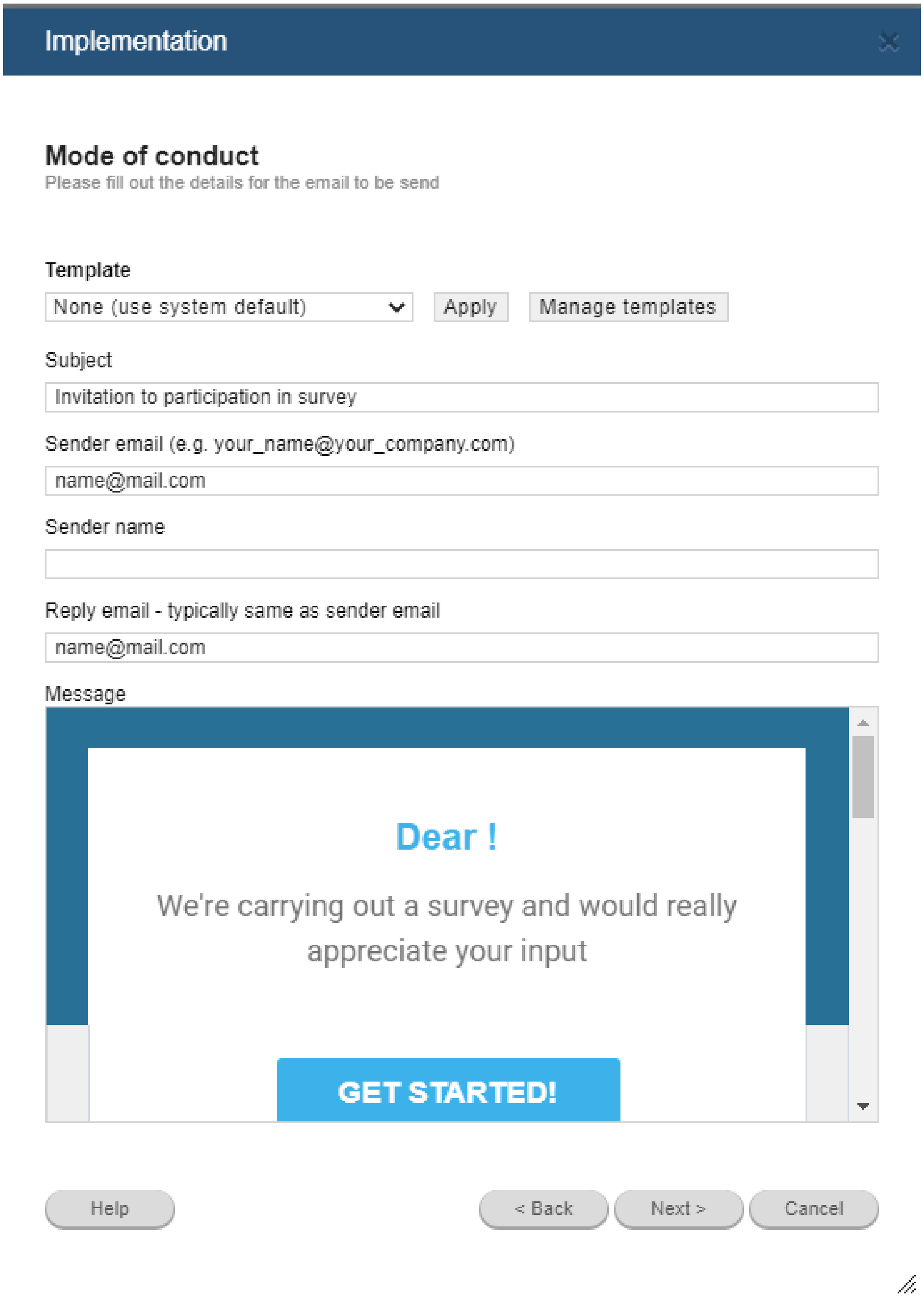
2.4 Select **Establish new panel** or **Send to existing panel**. Option **Send to all respondents** is chosen by default.

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



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

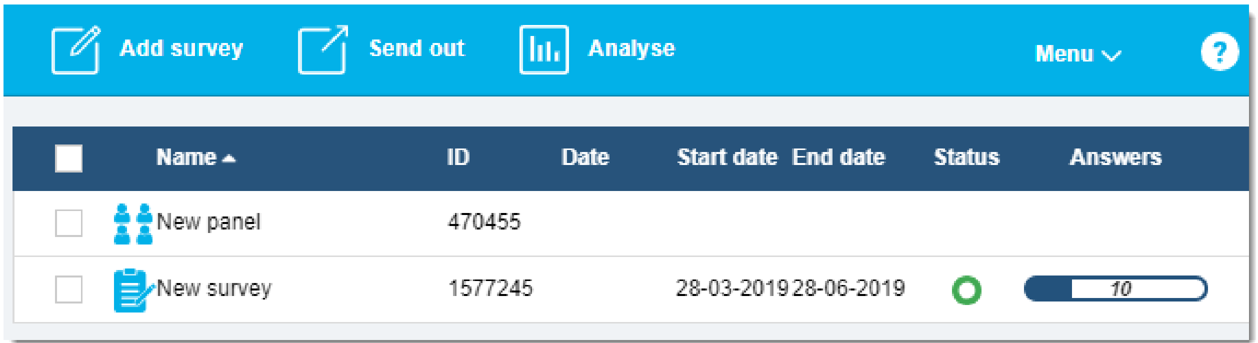
You can choose the **plain text** and **design** text formats. If you choose **design** you can format the e-mail text, insert images etc.



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**

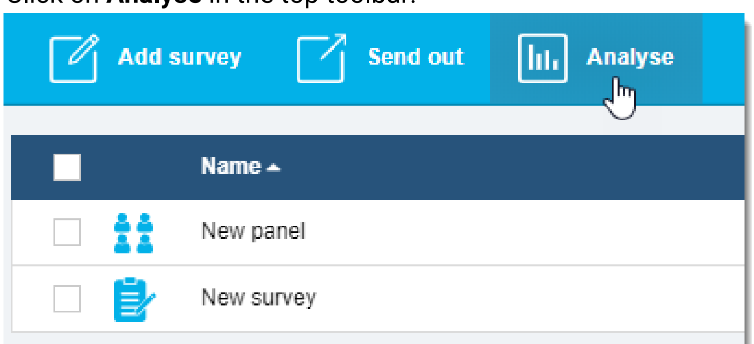


or you can create an **Analysis report** that counts the answers that were given to the various questions.

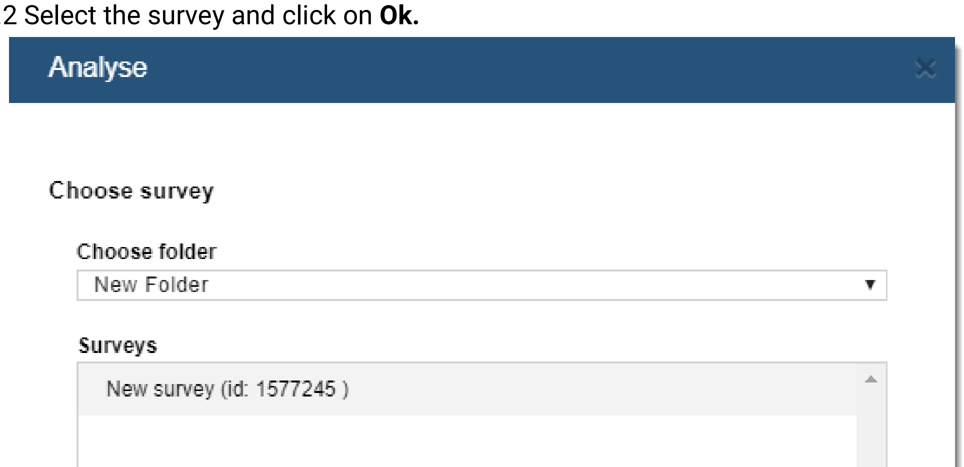
This report, you can continuously update, so you can constantly keep an eye on data collection.

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.

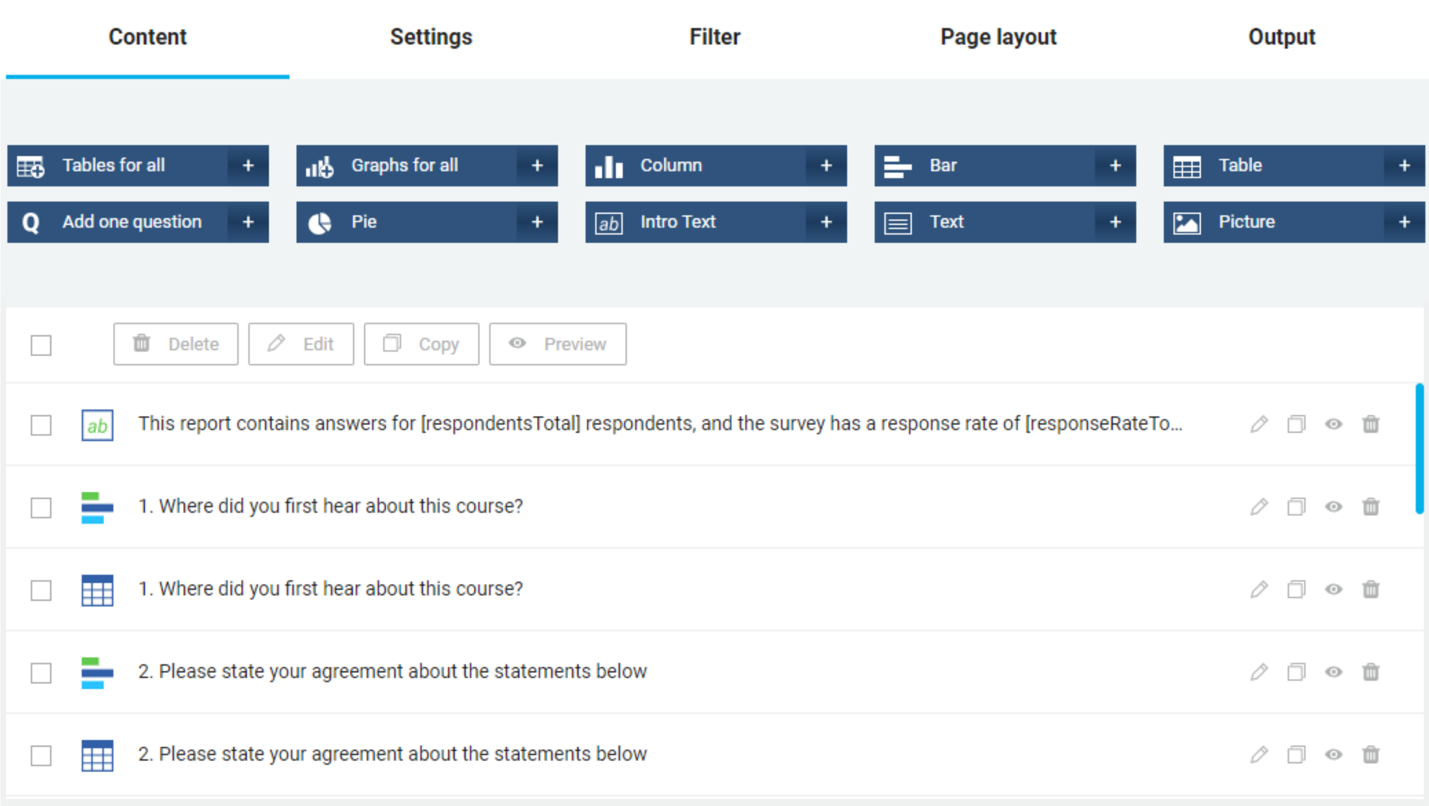
On the first tab, **Content**, you decide on which questions you want to include in the report, how to display them (table or graph), and their order.

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.

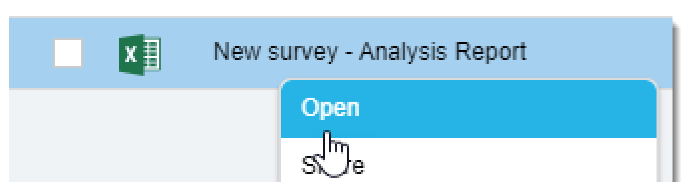
Under **Page layout** you can decide on the report design - color themes, images and logo.

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



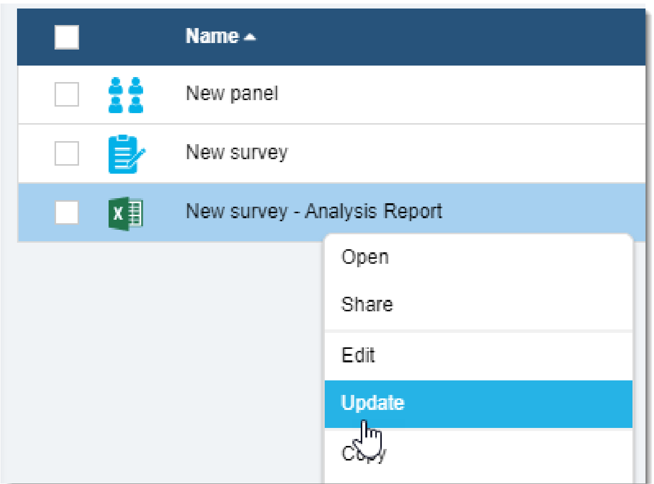
1.4 If you just click on **Ok** immediately, you will get a report in **Excel** with graphs and tables for each question.

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



2. Report update

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

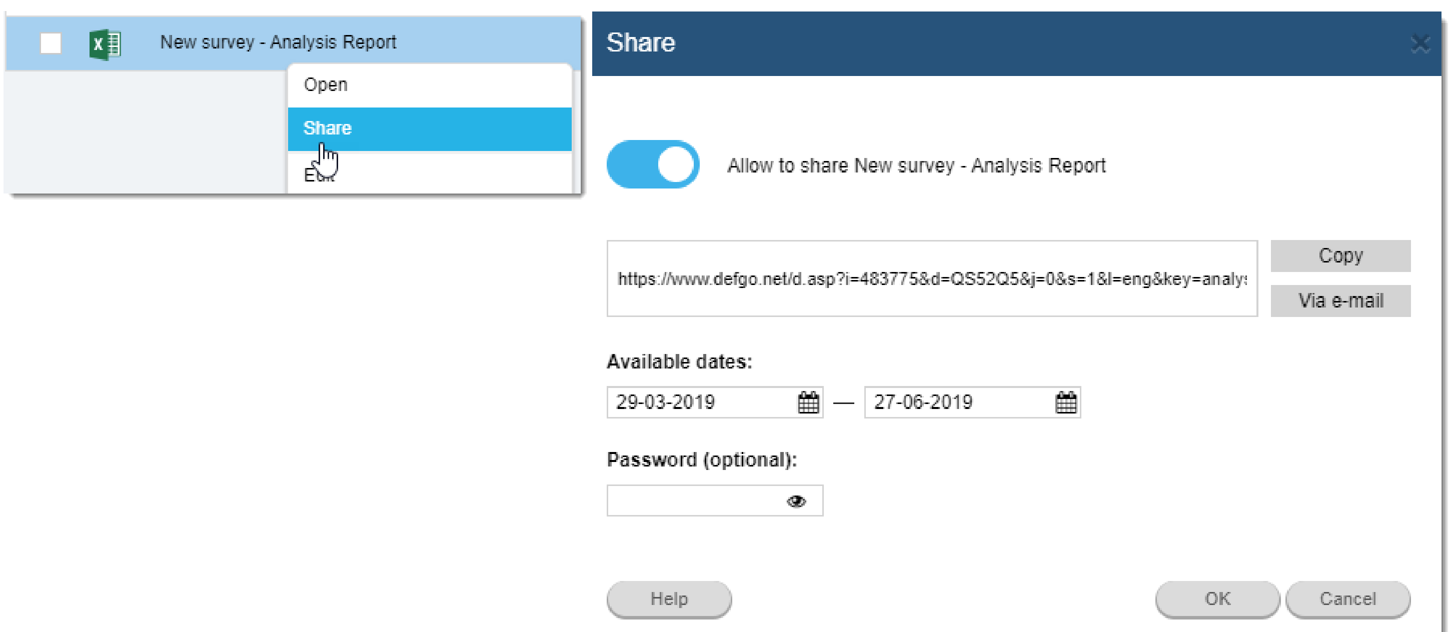


3. Share report

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.**

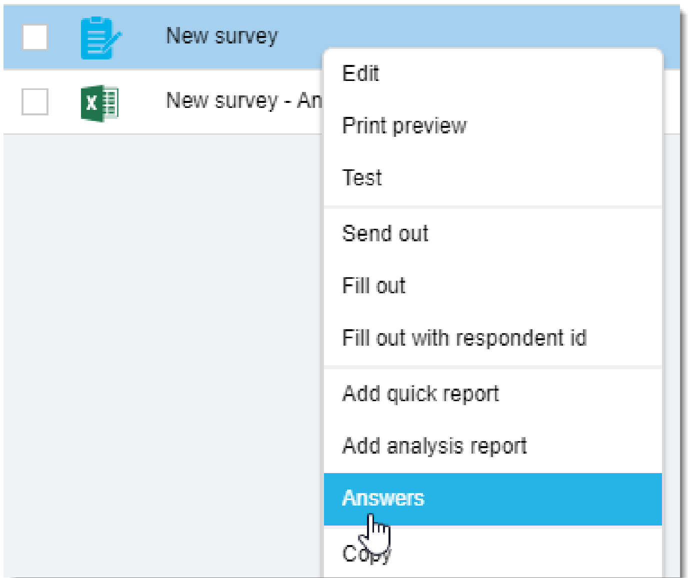
The link can be sent via an e-mail or it can be placed on an intranet, where many people can get access to a currently updated version of the report.



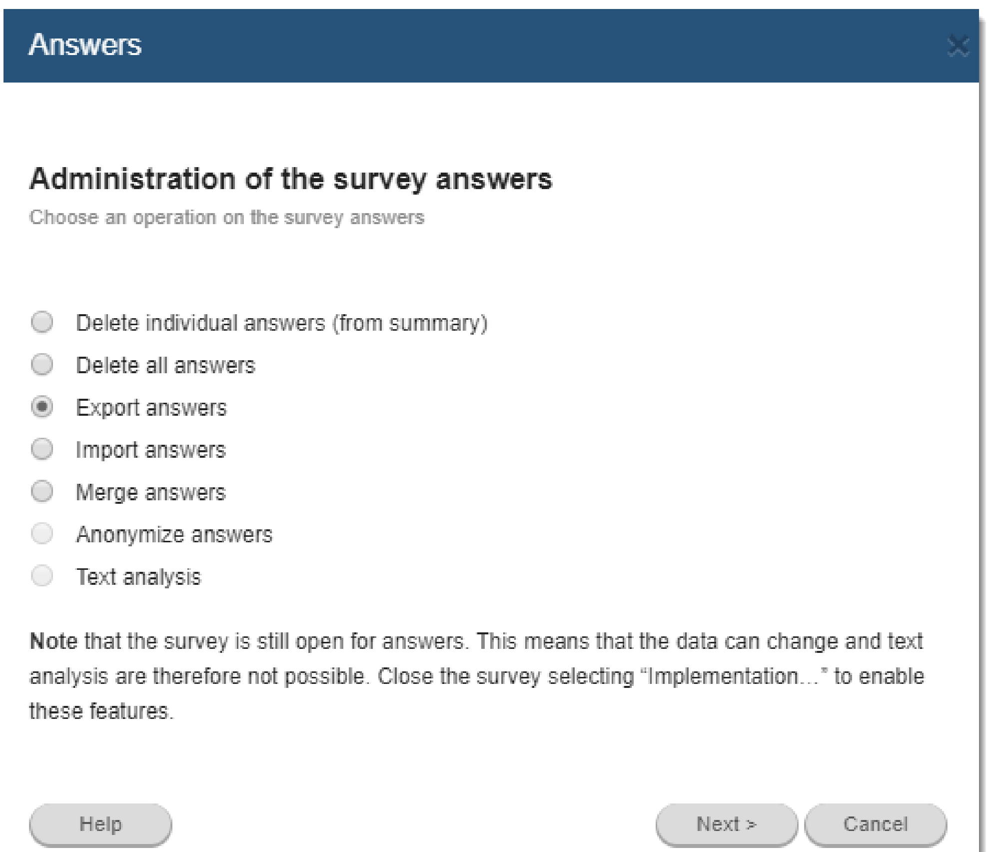
4. Excel export

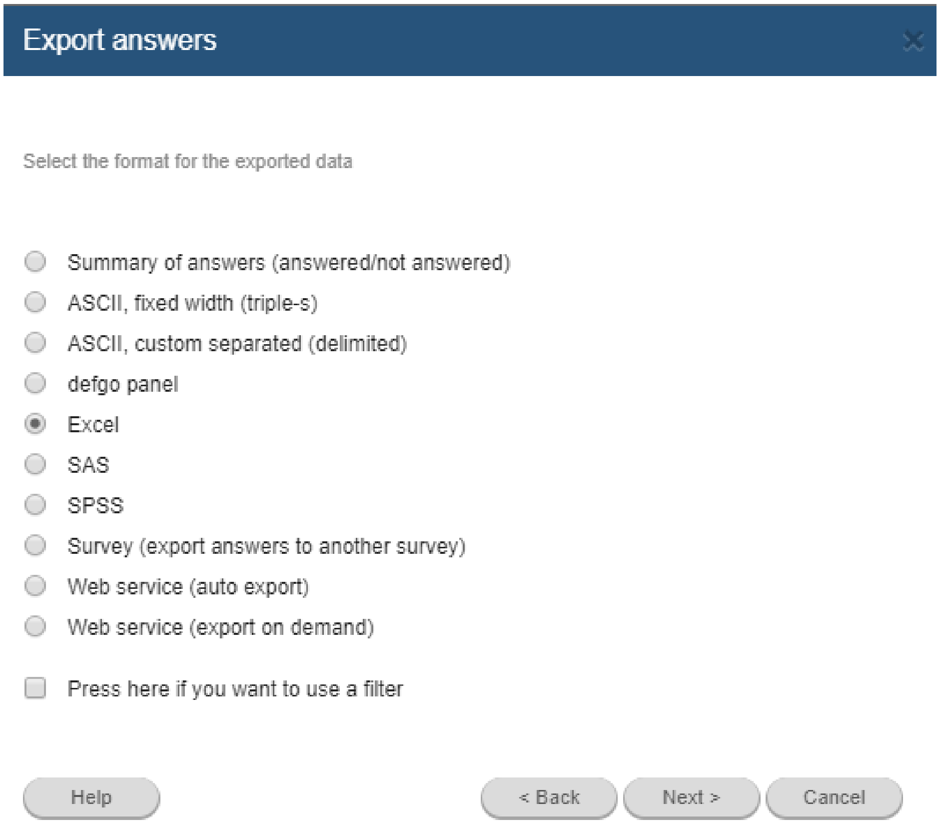
4.1 An excel export put all responses in a spreadsheet: one line for each respondent.

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



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





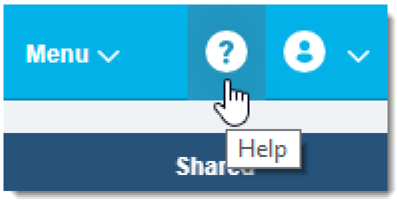
4.3 The Excel export provides a row of all response data (incl. panel data) for each respondent.

	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.