Anonymous Survey

Written for FEB 8.6

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This type of application collects information from a target audience. It does not require an individual to login to the application and typically does not request personal information.

Setting up security for anonymous access is documented in the IBM Forms Wiki. This article will go into a little more detail and provide screenshots of the required steps.

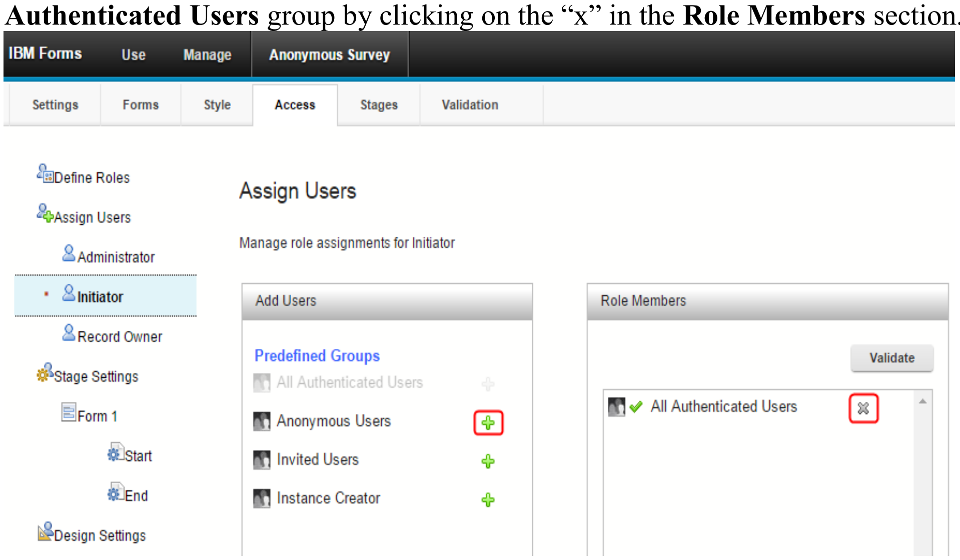
Design

In this article we will not go into the content of the survey.

Access

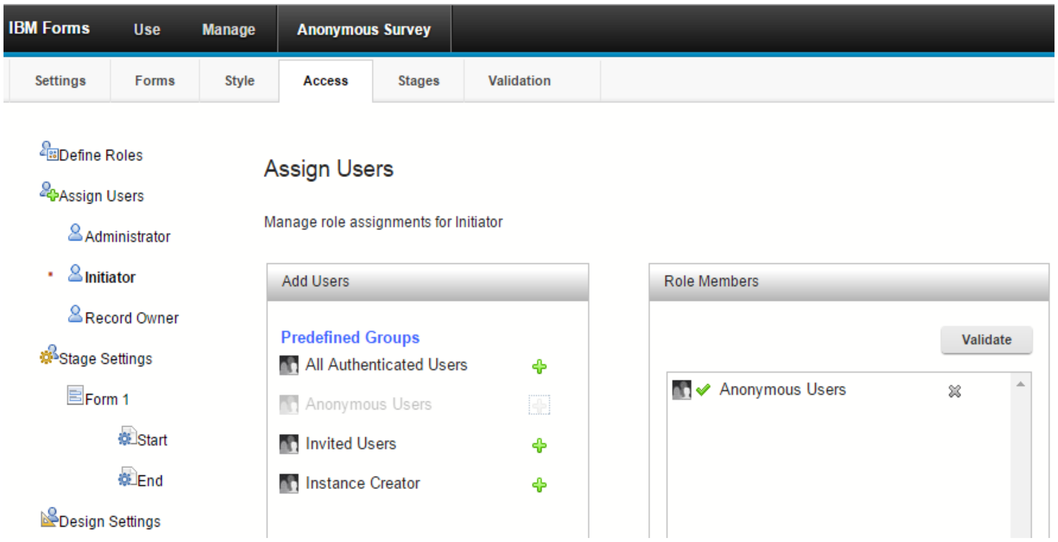
Who has access to fill out your survey is controlled by the settings on the **Access Tab**. To make a survey available to anonymous users we need to make changes to the **Initiator Role**; when an application is created "All Authenticated Users" is the default.

Remove the **All Authenticated Users** group by clicking on the "x" in the **Role Members** section.

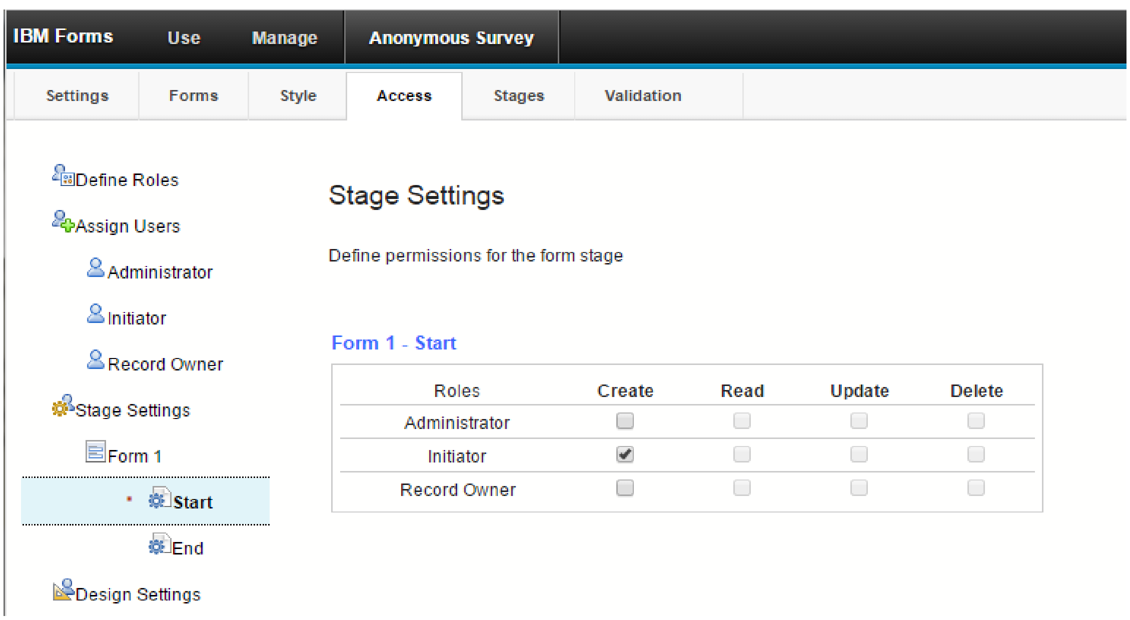


Note: If you want authenticated users and anonymous users to be able to complete your survey then you will have to have both groups added to the initiator role.

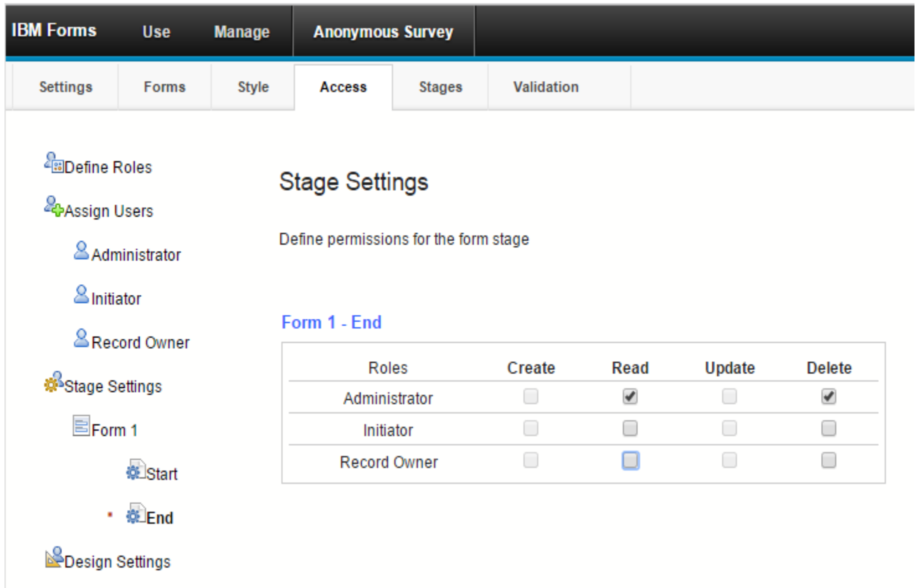
Add the **Anonymous Users** group by clicking on its "+" button in the **Add Users** section.



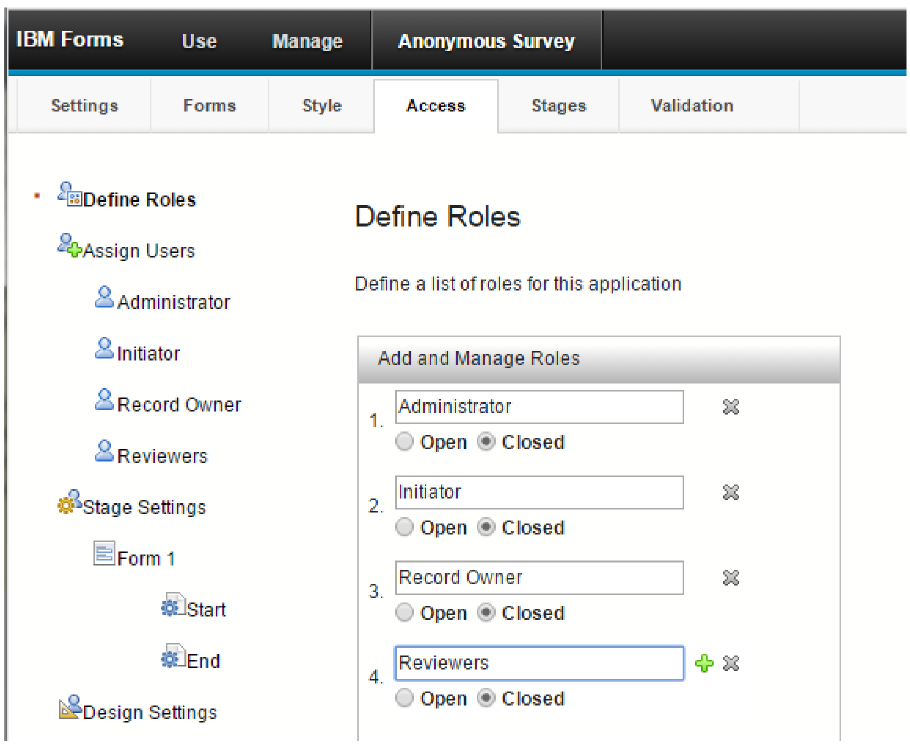
Now we need to turn our attention to the access permissions for the start and end stages to insure that the correct people have access. Under **Stage Settings** select the **Start** stage for your form. You will see a table that shows all the roles and their access permission for the selected stage. In this case only the **Initiator** (anonymous user) will be able to create survey records.

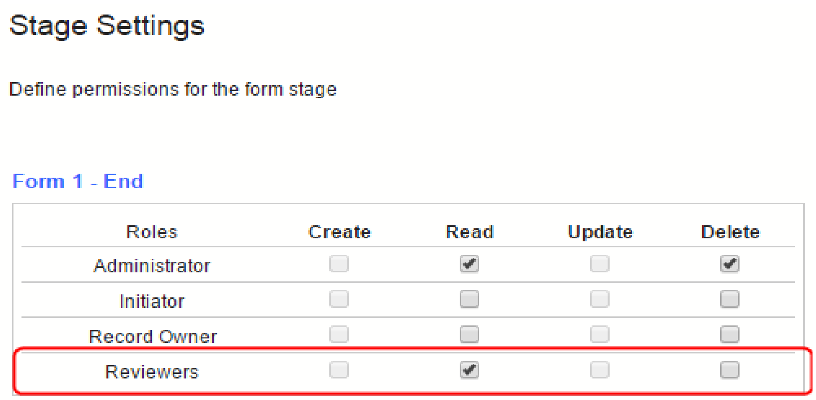


Next select the **End** stage. The table here depicts who will have access to review the submitted records from the View Responses page. If you only want the application administrator to review the submitted records then you would give the **Administrator** role **read** access and remove it for all the other roles. If you have a group of people that should have access to view the submitted records then you should create a new Role – do not add them to the Administrator role. The Administrator role is for people that can edit the application and you should be selective about who gets access.



You can add additional Roles by clicking on the Define Roles button. Add a new Role for your review group and then give that group the necessary Read permission in the End stage. Note that the role is "closed" this simply means that it is static and cannot be changed programmatically. If you want to dynamically assign users to a role then you will have to set it to "open" but that will be discussed in a later topic.





Stages

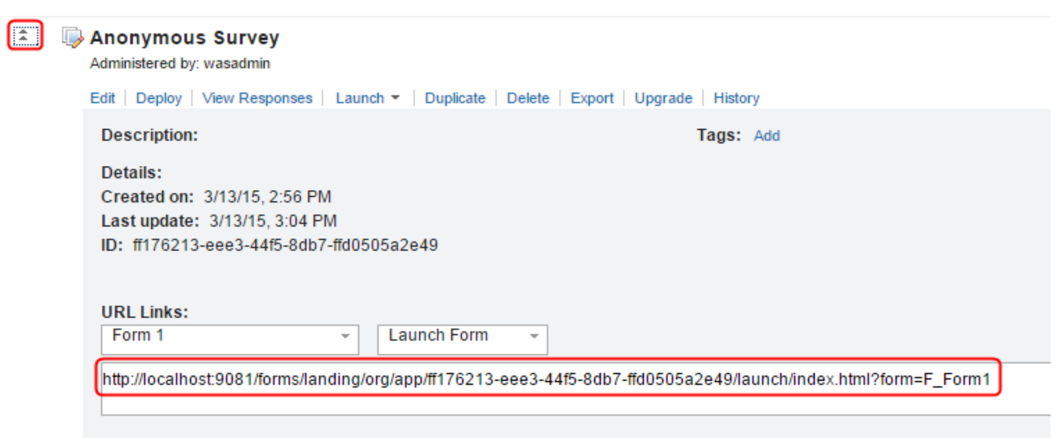
The typical survey only consists of the Start and End stage. The **Start** stage is the act of filling out the form. The submit button will be added automatically and will move the survey from the start stage to the end stage. Once a form is in the end stage it can no longer be updated. A basic survey form does not require any additional stages and you will not need to make any changes to this section.

Distribution

Once your application is complete and deployed you can start circulating your form to capture responses. The most common methods for an anonymous survey would be to:

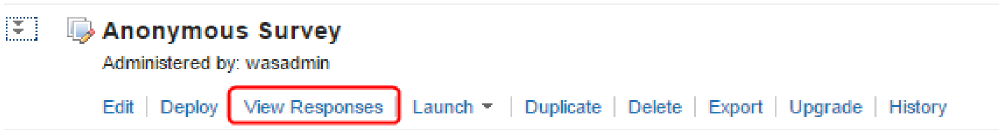
1. Distribute the direct link via email or other electronic format.
2. Provide the form link in an existing portal or web page.

The link for accessing the form directly can be found on the Experience Builder Manage Application management screen. Expand your application and then copy and paste the URL for use by your distribution method:



Data Analysis

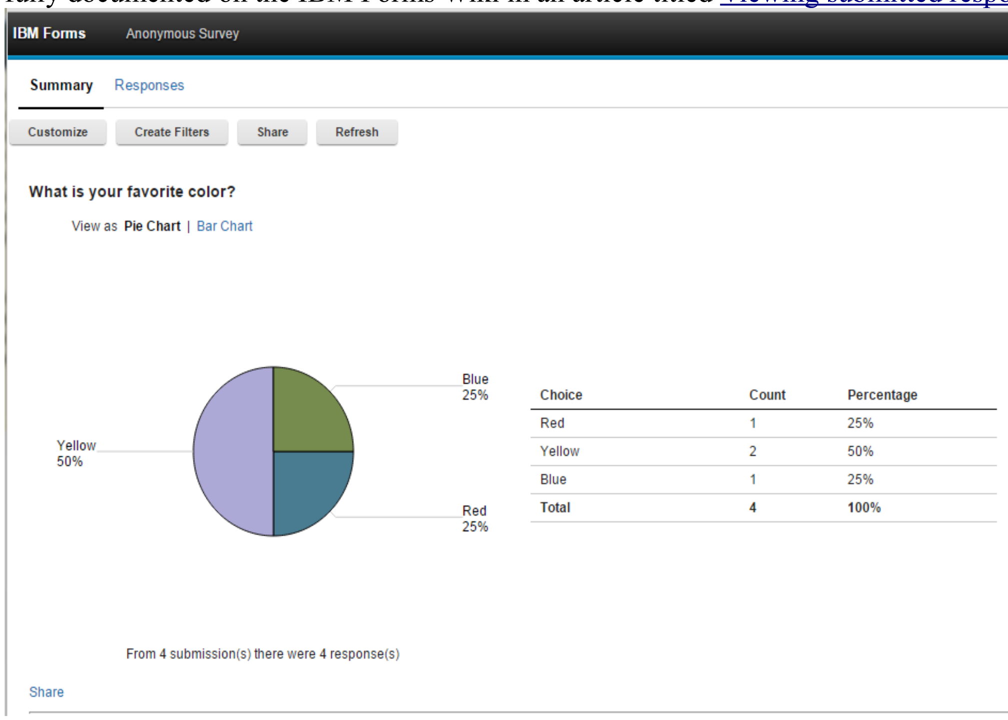
Once you start receiving responses to your survey you will be able to view the results using the View Responses page.



There are two parts to reviewing submitted responses; the **Summary** and the **Responses**.

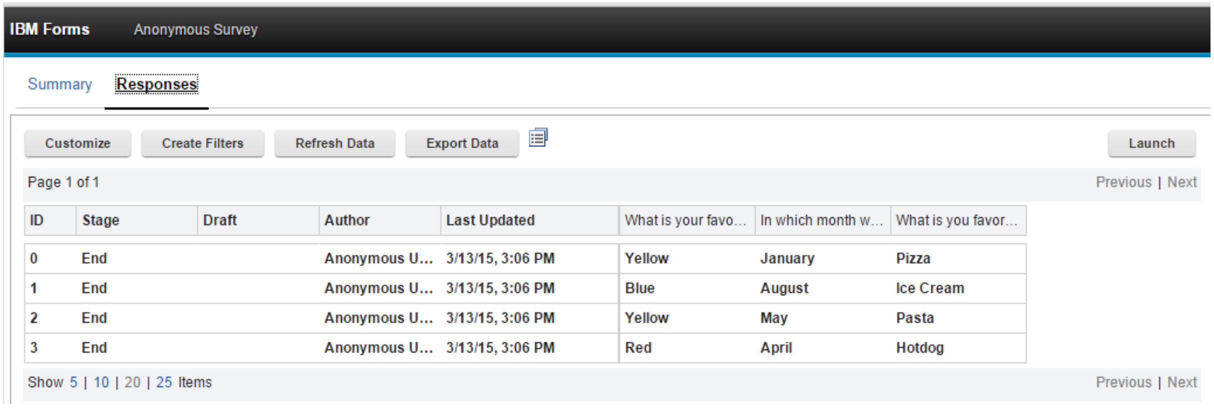
Summary Page

The summary page contains a series of charts that will be created for specific data types. The charts and their functions are fully documented on the IBM Forms Wiki in an article titled [Viewing submitted responses].



Responses Page

The responses page is broken down into two parts: a table to view all the records that you have permission to view (as defined in the Access permissions of each submitted record) and a viewing pane where the selected form in the table will render. There are several different types of customizations that can be applied based on your preference. You can change the number of rows shown, the columns shown or apply a filter to restrict the rows shown based on specific criteria.



If you require the data in a different format or want to create your own custom reports you can export the data as an XML, Excel or Symphony document. Select **Export Data** and select the desired format to export the data.