

ADMINISTRATION FAQs

How to create users, allocate access privileges and generally administer accounts

Prepared by consultants at Demographix.com – online surveys made easy!

1. What are the main differences between Account Holders and Users?

Demographix assigns one Account Holder to every company or organisation that opens a demographix account.

An **Account Holder** has full access privileges – they can create, edit, publish and delete surveys; they have full analysis rights to all surveys; and they can create new users, and delete them as well.

The second major administrator level is a **Full User** account. **Full Users** have full access and admin privileges, but with one crucial difference – **Full Users** cannot delete surveys or delete other users from the system. Only the Account Holder can delete surveys or other users.

2. What are the main differences between Creators and Colleagues?

The second tier of users is the Creator and Colleague accounts. These are accounts that allow you to give access to the system to people who can work on creating surveys and analysing data.

A **Creator** can create, edit and publish surveys, but cannot delete surveys. They can only access the surveys they have created unless access to a survey is granted by the Account Holder, a Full User or the Creator of the survey. **Creators** have full analysis privileges on surveys they have created.

A **Colleague** cannot create or publish surveys, but can edit a survey if they are given access rights to that survey by higher level users. They can also only access analysis and do data downloads if given access privileges to a specific survey. Colleague accounts are most suitable for giving internal access to survey results.

3. What is a Client account?

If you wish to give people outside your organisation access to survey results, you can create a **Client** account. **Clients** can be assigned access privileges to whole surveys or even individual questions within a survey.

The table on the following page summarises the access rights and facilities available for all the above types of account.

	Account Holder	Full User	Creator	Colleague	Client
Surveys					
Access all surveys belonging to account	✓	✓	✗	✗	✗
Create survey	✓	✓	✓	✗	✗
Edit survey	✓	✓	✓	!!	✗
Publish survey	✓	✓	✓	✗	✗
Delete survey	✓	✗	✗	✗	✗
Analysis					
Analyse survey	✓	✓	✓	!!	!!
Cross tab analysis	✓	✓	✓	!!	!!
View response rate and page views	✓	✓	✓	!!	✗
View individual responses	✓	✓	✓	!!	✗
Download raw data	✓	✓	✓	!!	✗
Shared resources					
Upload images	✓	✓	✓	✓	✗
View and edit all images	✓	✓	✓	✓	✗
View and use Scrapbook	✓	✓	✓	✓	✗
Users logins					
Add User, Colleague, Creator & Client log-ins	✓	✓	✗	✗	✗
Delete User, Colleague, Creator & Client log-ins	✓	✗	✗	✗	✗

KEY: ✓ YES ✗ NO !! SET PER SURVEY

4. How to create a new account and change account status

Click on the "Manage Your Account" option in the menu at bottom right of the screen. In the User Management section, click the Add New User button at bottom right. Enter the relevant details and user category for your new user, and select whether you wish to send details to them. Clicking the Save Details button will then action this. If, at a later date, you wish to change the status of a user, click the "User Status Overview" option at the top of the User Management section. This will display a full list of users. Tick the Change option to bring up a pull-down menu to select the

new status for your user (or to delete them). Clicking the Make Changes button will then save your new settings.

5. How to allocate privileges on a survey to a Colleague or Client

Select the survey you wish to allocate privileges to and click on the Survey Properties. There are two tabs here – for Colleagues and Clients – which allow you to set access privileges. Choose the colleague from the pull-down menu, then tick the privileges you wish to assign to them, and click Save. Repeat for other colleagues if necessary. Under the Client tab you have different set of permissions, allowing you to specify how they can analyse results – restricting what they can view either by filtering all responses or by selecting certain questions.

Note that when setting permissions for a survey users with Creator status appear in the Colleagues list.

There are lots more tips on administering accounts using the high-powered demographix service. Click on the Helpdesk option on the bottom left-hand corner of the workspace to access our library of help files.