



CHECKLIST OF FEATURES

Checklist of Features

ASSESS AND COMPARE

In addition to our comprehensive library of FAQ's, we have created a detailed check-list to help you assess and compare features functions across competing survey systems. This checklist is organized in a way that aligns with our library of FAQ's to give you the most complete and clear understanding on how InSite Surveys can meet your needs and how it compares to other applications you may be evaluating.

In fact, our checklist and library of FAQ's are the most widely referenced and downloaded documents used by customers to help assess, and compare features and functions across competing survey systems.

We strongly suggest taking a look at and downloading this document before you start creating your own "wish-list" of features!

1. Working with Online Surveys

1.1 Survey Design & Layouts

	InSite Surveys				
I can create surveys from scratch	✓				
I can customize survey layout/template to include a logo's, fonts, and colors	✓				
I can create surveys based on predefined survey templates	✓				
I can brand surveys	✓				
I can use HTML programming if desired when programming the survey (for formatting, line breaks, etc.)	✓				
I can configure a survey with multiple pages	✓				
I can preview my survey during and after creation	✓				
I can print a blank survey for review or for offline distribution	✓				
I can customize a "thank you" message	✓				
I can add an instructions page at the beginning of survey	✓				
I can add a dynamic landing page	✓				
I can add instructions as a survey header	✓				
I can insert a survey progress bar or a display the percent a survey is complete	✓				
I can create a survey in multiple languages	✓				
I can edit previously-created surveys	✓				
I can copy previously-created surveys	✓				
I can spell-check my survey	✓				
I can embed a survey within an HTML Web page	✓				
I can configure my survey to contain hyperlinks and other functionality in the survey header	✓				
I can configure my survey that allows respondents to stop and resume the survey (finish survey later)	✓				
I can configure my survey so that respondents can close their browser without losing information entered	✓				
I can use my own CSS style sheets to manage to look/feel of my survey	✓				
I can use InSite's default CSS style sheet templates	✓				
I can create Poll-type survey that appears on my web page	✓				

1.2 Survey Questions

	InSite Surveys				
I can configure a survey with an unlimited number of questions	✓				
I can configure questions where a respondent can select only one response option	✓				
I can configure questions where a respondent can select more than one response option	✓				
I can configure questions where a respondent can freely type their response	✓				
I can configure questions that are mandatory	✓				
I can configure questions that are optional	✓				
I can copy question or questions	✓				
I can configure skip-patterns to have respondents skip over specified questions depending on the answer selected	✓				
I can have text from a previous response option populate a subsequent question	✓				
I can configure questions to include a pop-up or tool-tip to provide respondents with additional information	✓				
I can spell-check my questions	✓				
I can configure questions that contain response options in a grid or table	✓				
I can configure questions that contain singles-select response options in a grid or table	✓				
I can configure questions that contain multi-select response options in a grid or table	✓				
I can configure questions that contain open-ended numeric response fields in a grid or table that calculates row and/or column totals	✓				
I can configure questions with rating scales	✓				
I can create survey question library	✓				
I can insert questions from question library	✓				
I can rotate my questions or change the order that question appear to a respondent	✓				
I can insert a link or links as part of my question or as a question	✓				
I can insert graphics or images as part of my question or as a question	✓				
I can insert audio, video or movie files as part of my question or as a question	✓				
I can insert documents as part of my question or as a question	✓				
I can configure my question that allows respondents to upload a file as an attachment as part of their response	✓				

1.3 Survey Response Options

	Insite Surveys				
I can incorporate multiple response options with my question	✓				
I can incorporate single response options with my questions	✓				
I can incorporate open-ended response options with my questions	✓				
I can configure response options with Leichart or rating scales	✓				
I can configure response option tables containing Liechart or rating scales	✓				
I can configure response option tables with check boxes	✓				
I can configure response option tables with menu drop-downs	✓				
I can spell-check my response options	✓				
I can configure response options that enforce a specific date format	✓				
I can format my response options to facilitate a skip pattern	✓				
I can have text from a previous response option populate a subsequent question	✓				
I can configure my response options to calculate sums or percentages	✓				
I can validate numeric responses	✓				
I can rotate the response options as they appear to a respondent	✓				
I can configure my response options to total a specified sum	✓				
I can ensure responses are in the correct format based on defined types (Integer, Number, Date, String, Email Address, etc.)?	✓				
I can ensure a response option has been selected before allowing a respondent to proceed to the next question	✓				
I can configure the survey so that respondents can go backward and change responses	✓				
I can configure a survey so that respondents can't go backward and change responses	✓				
I can configure a survey so that respondents can go back and change their responses once their survey is submitted	✓				
I can configure a survey to lock-out respondents once their survey is submitted	✓				

1.4 Survey Distribution

	InSite Surveys				
I can distribute surveys via web, email, pop-up box, or pocket PC-compatible devices	✓				
I can create e-mail survey invitations	✓				
I can import e-mail addresses and contact information into the system to send survey invitations	✓				
I can export e-mail addresses and contact info	✓				
I can create e-mail lists	✓				
I can manually type in e-mail addresses and contact information	✓				
I can easily insert survey links into my survey invitation	✓				
I can personalize survey invitations	✓				
I can merge respondent information into a survey invitation	✓				
I can configure invitations with the ability for respondents to opt out	✓				
I can designate “from” and a “reply-to” e-mail address in survey invitations	✓				
I can configure secure survey links	✓				
I can limit responses to one response per respondent	✓				
I can limit access to ‘invited’ respondents only	✓				
I can set a specific time and date that will automatically send out a survey	✓				
I can receive auto notification and confirmation that a survey invitation has been received	✓				
I can create and configure survey reminder notifications	✓				
I can set a specific time and date that will automatically send out a survey reminders	✓				
I can ensure reminder notifications are only sent to non respondents	✓				
I can easily follow up with non-respondents	✓				
I can set a cut-off/expiration date for a survey	✓				
I can embed a survey in an e-newsletter	✓				
I can have an unlimited number respondents to my survey	✓				

1.5 Survey Tracking

	Insite Surveys				
I can view real-time response rates	✓				
I can see who has/has not responded to a survey	✓				
I can identify respondents	✓				
I can turn on/off identifying the respondents	✓				
I can limit responses per IP address	✓				
I can see the time/date a survey has been submitted	✓				
I can receive auto notification and confirmation that a survey has been submitted	✓				
I can make respondents anonymous	✓				
I can see how complete/incomplete a survey is on a case-by-cases bases	✓				
I can link specified responses to a respondent	✓				
I can view abandon rates real-time	✓				
I can sort my respondent list	✓				
I can sort my non respondent list	✓				
I can export respondent/ non respondent lists	✓				
I can assign quotas to pre-defined respondent groups	✓				

1.6 Survey Reporting & Data Analysis

	InSite Surveys				
I can capture an unlimited number of respondents/responses on any survey	✓				
I can instantly view survey results with summary statistics in real-time	✓				
I can instantly view quantitative results	✓				
I can instantly view qualitative results	✓				
I can view graphical results online	✓				
I can produce statistics on the survey responses by certain defined criteria	✓				
I can keep my results online as long as I want	✓				
I can cross tabulate quantitative results	✓				
I can filter my results	✓				
I can publish reports to the web	✓				
I can create reports based a predefined template	✓				
I can create and customize reports	✓				
I can share results with others	✓				
I can archive survey questions and results	✓				
I can export my results and datasets	✓				
I can create a report that covers multiple surveys	✓				
I can display real-time results to respondent after submission	✓				
I can display real-time survey results and reports directly to the Web	✓				
I can view individual responses	✓				
I can identify or match respondents to responses	✓				
I can save an individual response	✓				
I can delete responses	✓				
I can publish survey results and reports directly to the Web	✓				

1.7 Survey Administration

	Insite Surveys				
I can redirect respondents to a website after survey	✓				
I can create a survey intro page that asks for an ID or PIN number to verify or authenticate respondents before taking the survey	✓				
I can allow respondents to view their responses to a survey	✓				
I can allow respondents to print a copy of their survey questions and responses	✓				
I can specify a date to close and/or deactivate a survey	✓				
I can authenticate responses to avoid duplicates	✓				
I can pre-test a survey and purge test responses	✓				
I can share data with other users and/or respondents	✓				
I can give other users access to survey data	✓				
I can lock out respondents from submitting more than one survey?	✓				
I can lock down a survey once it is submitted so that a respondents can't return and alter their questions	✓				
I can write URL parameter data to individual response records	✓				
I can track URL parameters	✓				
I can add third-party browser-based Web analytics JavaScript to pages for tracking purposes (WebTrends, Omniture, Google, etc.) and produce usage statistics	✓				

1.8 Survey Panel Management

I can import panellists' email addresses and information into the system	✓				
I can export panellists' email addresses and information	✓				
I can maintain and reuse panellist contact information	✓				
I can create panellist groups and assign panellists to groups	✓				
I can have site visitors join a panel and automatically be assigned to a distribution list	✓				
I can assign quotas to pre-defined respondent groups	✓				

2. Managing User Accounts

2.1 System Administration Controls

	Insite Surveys				
I can specify which individuals or groups of individuals may create, edit, delete or view a survey	✓				
I can create roles relevant to the survey process and assign access to tool functionalities based on roles	✓				
I can create work groups and assign individuals to a group	✓				
I can system administrators track which user made a particular revision of survey	✓				

2.2 Application Access

I can access the application from the Internet	✓				
I can have full administrative/users access functionality via the Web browser minimal additional clients plug-ins	✓				
I can assign user authorizations/roles	✓				

2.3 Workflow Features

I can approve a survey before it is released to respondents	✓				
I can log when a survey has been approved and released	✓				
I can specify surveys to be read-only after survey has been finalized	✓				
I can assign one or multiple authors to a survey	✓				
I can prevent anyone other than the survey author from editing a survey	✓				
I can identify alternate administrators to be used in case of absence or conflict	✓				
I can view an audit history of survey edits and revisions	✓				

3. Security

3.1 Physical Security

	InSite Surveys				
InSite has robust Physical Security	✓				

3.2 Security Audits

InSite conducts regular security audits	✓				
InSite is hacker safe	✓				
I can maintain an audit trail of access and changes	✓				

3.3 Security Links

I can configure secure links to a survey	✓				
I can assign user ID's and passwords to allow specific access to InSite	✓				
I can lock-down the system after excessive failed login attempts	✓				
I can integrate InSite with active directory	✓				

3.4 Secure Service

The system supports strong authentication	✓				
InSite provides secured client/server and backend communications	✓				

4. Hosting Environment

4.1 On-Demand

InSite is based on an ASP/SAS/On-Demand model	✓				
I can request my application reside on a dedicated server	✓				

4.2 Customer Hosted

I can choose to host the application independently	✓				
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5. Training & Support

5.1 Customer Training

	InSite Surveys				
Training is included in the “base” offering	✓				
Onsite supplemental training is available	✓				
Remote supplemental training is available	✓				
User documentation is available	✓				

5.2 Customer Support

Web-based support 24/7, toll-free help-desk 8AM-5PM PST, and e-mail support requests are available	✓				
Disaster recovery and other business continuity provisions are in place	✓				

6. Survey Services

6.1 Survey Design & Consultation Services

I can have InSite design and consult on my survey	✓				
I can get someone at InSite to help “jump-start” my survey	✓				
I can get someone at InSite to design my entire survey	✓				
I can get someone at InSite to review, or provide feedback, on my survey	✓				
I can get someone at InSite to help me format my survey	✓				
I can get tips, information, or recommend best practices for designing online surveys	✓				

6.2 Survey Distribution Services

I can get someone at InSite to dispatch my survey?	✓				
I can get someone at InSite to track and manage my survey in-field	✓				
I can get someone at InSite to help me manage quotas and follow-up with non-respondents	✓				
InSite offers tips, information, and recommend best practices for online survey distribution	✓				

6.3 Survey Panel Management Services

I can get InSite manage my entire Panel	✓				
I can get someone at InSite to help me “jump-start” my panel	✓				

InSite Surveys					
✓					

6.3 continued

I can get someone at InSite to review, or provide feedback, on managing my panel”“InSite offers tips, information, and recommend best practices for survey panels	✓				
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6.4 Survey Reporting Services

I can get someone at InSite to organize and produce my entire report	✓				
I can get someone at InSite to help me “jump-start” my report	✓				
I can get someone at InSite to review, or provide feedback, on my report	✓				
InSite offers tips, information, and recommend best practices for preparing reports	✓				

6.5 Product Enhancement Requests

InSite can customize my system	✓				
I can customize InSite on my own	✓				

6.6 Programming Services

InSite offers programming services	✓				
I can get someone at InSite to review, or provide feedback, on what I’ve programmed into my survey	✓				

7. Infrastructure

7.1 System Platform & Infrastructure

InSite is scalable	✓				
InSite is built on a standard, supported MSFT technology (e.g., .NET)	✓				
InSite backups data when application is active	✓				
InSite stores all data (surveys) and pointers to surveys that backups can successfully restore all data	✓				
InSite can easily integrate with commercially available usage reporting/monitoring systems (WebTrends, etc.)	✓				
InSite supports business continuity and a high-availability strategy (redundancy, fail-over, load balancing, etc.)	✓				

7.2 Database

InSite uses SQL as the backend database.	✓				
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8. Pricing

8.1 Licensing & Subscriptions

	InSite Surveys				
A Standard Service Agreement is available	✓				
A Commercial Service Agreement is available for agencies and service bureaus	✓				

8.2 System Add-ons

InSite has system add-ons or plug-ins	✓				
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