

Getting Started with RAPid InTouch

Introduction

RAPid InTouch is a simple-to-use business tool that gives the user the ability to collect information through scorecards and surveys, and subsequently connect this with other data. RAPid InTouch is hosted on Rosslyn Analytics' RAPid cloud platform.

This guide will explain RAPid InTouch' key features.

RAPid InTouch Uses

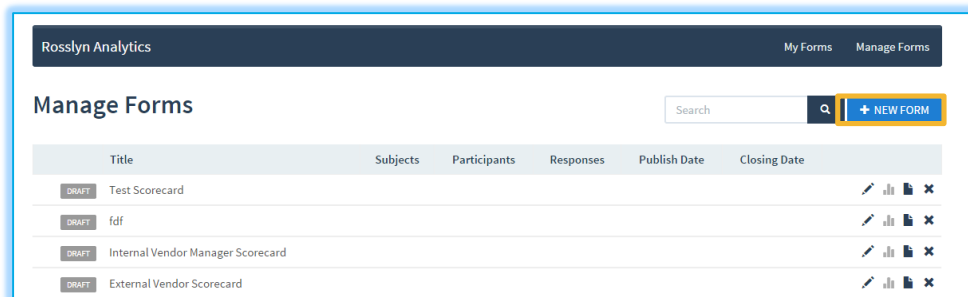
RAPid InTouch can be used for a variety of data collection applications:

- Supplier Performance Management/Analytics.
- Customer satisfaction surveys.
- Prospect analysis.
- Collection of up-to-date contact information ready to store in the company address book.
- Employee surveys.
- Pre-qualification questionnaires/RFIs.
- Health and safety questionnaires.
- Employee performance review.

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Creating a New Form

Click on “New Form” to start creating a new form.



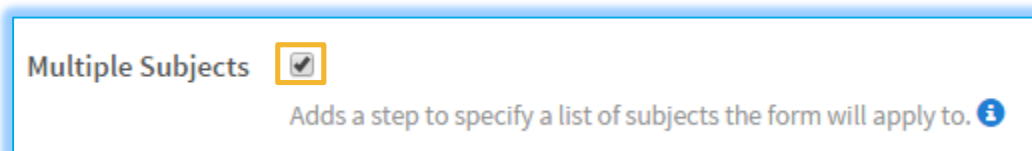
There are three types of form:


- **Scorecard:** A form designed for collecting inputs which can be scored. Results displays are based on the scoring calculations provided by the user.
- **Survey:** A form designed for collecting inputs where the results are based purely on aggregation of answer types (e.g. 40% of respondents answered in a particular way), or cannot be scored (e.g. free text answers).
- **Data capture:** A form for capturing data only – no scoring or aggregation will be performed on the results.

Select the form type required (the default is scorecard) and fill in the ‘Title’ and ‘Description’ fields.

Note: The text provided in the Description field will be shown in email notifications sent to form participants.

It is possible to have multiple subjects for a form. The default is without subjects. To add multiple subjects, check the ‘Multiple Subjects’ checkbox.



For more information about adding multiple subjects, click on the  icon next to the description.

Click “Save Form” at the bottom of the page to save the form in a draft state.

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Designing Form Contents

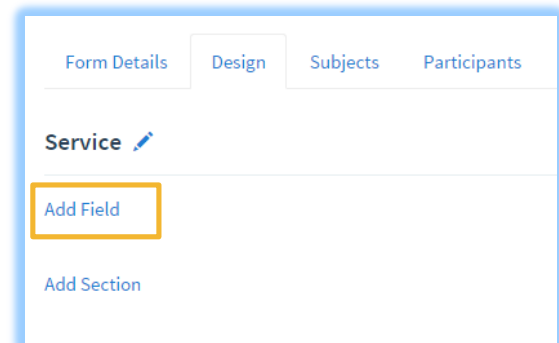
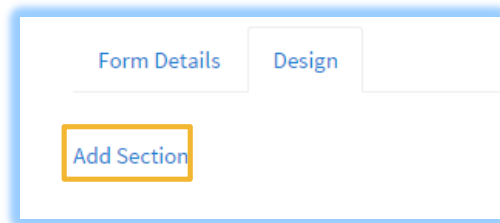
To design a form, click on the 'Design' tab.



Forms in InTouch are built up in 'sections' (a logical grouping of data fields or survey questions). Click on 'Add Section' to add a new form section.

The section edit panel will appear at the right side of the form. The 'Title' field is mandatory and is required to activate the 'Save' button at the bottom of the edit panel. Other fields are optional.

Click 'Add Field' to start adding scorecard and data capture fields or survey questions.



Available field types:

- **Rating:** A multiple choice field where each option is assigned numeric value which will be used for scoring in scorecards.
- **Date:** A pop-up date picker (a calendar). This field only accepts valid date format answers.
- **Multi-line Textbox:** A textbox spanning multiple lines and accepts any length of text.
- **Multiple Choice (Multiple answers):** A list of possible answers. Multiple selection is allowed.
- **Multiple Choice (One answer):** A drop-down list of possible answers. Multiple selection is not allowed.
- **Numeric Textbox:** A field which only accepts numeric values. Values from numeric fields can be used in scoring calculations.
- **Single Text box:** A textbox spanning a single line.

Create fields as required and click on 'Save' at the bottom of the edit panel.

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Adding subjects to a form

A “subject” is the focus of the form. All fields in the form are intended to be filled out about the subject. E.g. subjects could be products, or suppliers. The same scorecard will be sent out to participants to complete on a number of different ‘subjects’. When the results come in, each subject will be comparable to one another.

To add subjects to the form, click on the ‘Subjects’ tab below the form title.

Type in a subject name and click on ‘Add Subject’ to add manually, otherwise upload Subjects in block. File uploaded must be a .csv file.

Click on the ‘Save Form’ button at the bottom of the page before navigating to the participants’ page.

Adding Participants to a form

Participants are the people who will be invited to take part in completing a form. A participant can be internal or external to an organisation. InTouch supports sending a single form out to multiple people, or multiple forms to a single person, or any combination in between (e.g. one form for one subject to one participant).

To add participants, click on the ‘Participants’ tab.

Participants can be added either manually, or in bulk:

1. For manual entry, type each participant’s name and email address into the fields provided and click on ‘Add Participant’.
2. For bulk upload, choose ‘Upload Participants’ and navigate to a CSV file containing a list of participant names and addresses. Download the template for assistance.

To send to non-RAPid users, unselect the checkbox labelled ‘Registered RAPid users only’.

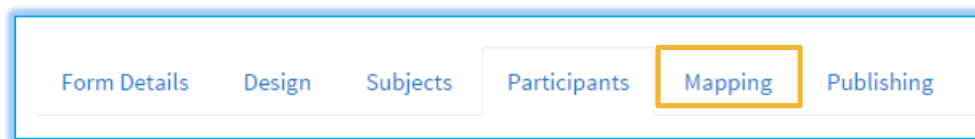
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Mapping Subjects to Participants

The mapping tab only becomes available when the 'Override Mapping' box is ticked in the form details page. By default, all listed participants receive the form for all added subjects.

Overriding this mapping provides the capability to select exactly who gets forms for which subjects. Only participants mapped to a particular subject will receive a request to respond to that particular subject.

To map subjects to participants, click on the 'Mapping' tab.



The mapping page displays all subjects on the left-hand side of the page.

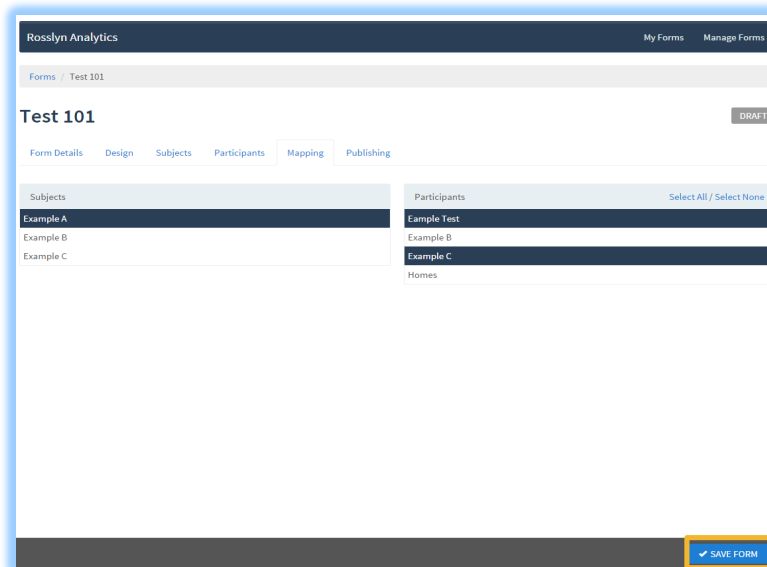
To start mapping, click on a subject.

The participants list will appear on the right-hand side of the page.

'Select All', 'Select None' or select participants individually by clicking on the participant's name from the list.

This step should be repeated to map all subjects to participants.

Click on 'Save Form' at the bottom of the page before navigating to the 'Publishing' page.



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Scoring

A scorecard can be used to define metrics against which scores can be automatically calculated. Within a scorecard, scoring formula and KPIs can be set.

Key Performance Indicator levels (KPIs)

To set up KPIs, click on the KPI '+' icon, either at the section level (i.e. define what total scores for the section would constitute a red, amber or green rating), and/or at the form level.



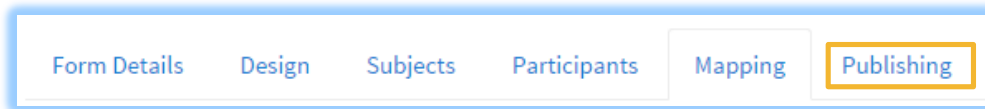
Examples of KPI rules are specified as follows:

Label	Rule	Meaning
Poor	[score] <= 3	A score less than or equal to 3 will be shown as 'Poor' in results.
Average	[score] >= 4 and [score] <= 6	A score between 4 and 6, inclusive, will be shown as 'Average' in results.
Good	[score] >= 7	A score greater than or equal 7 to will be shown as 'Good' in results.

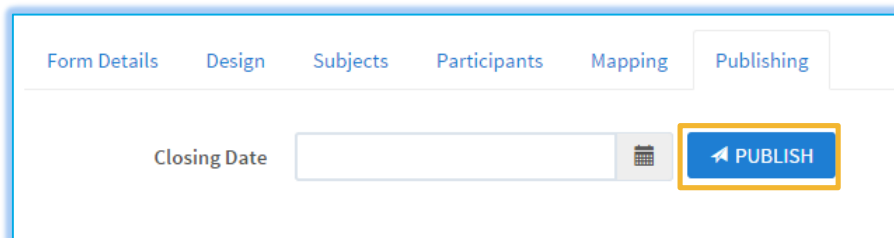
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Publishing a form

To publish a form, click on 'Publishing' tab.



Publish with or without a closing date.



Note: It is possible to close any open form later.

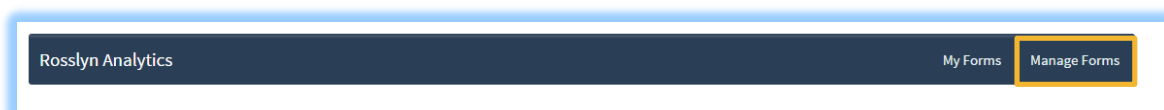
When a form is published, an email containing a link to the form is sent to participants. The form's status is updated to 'Open' which means that the form is now open to responses from the participants.


Note: It is not possible to edit the form design of a published form.

Results

After a form has been published and the participants start submitting their responses, results can be analysed.

To view results, click on 'Manage Forms' button at the top of the page.



Click on the  icon to view the reports for the published form.