

MARQUIS

DMX339 Publish a Survey

Order of Steps Tasks

Step 1 Log into DocuMatix

Step 2 Select the **Product Suite** product and the **Surveys** module

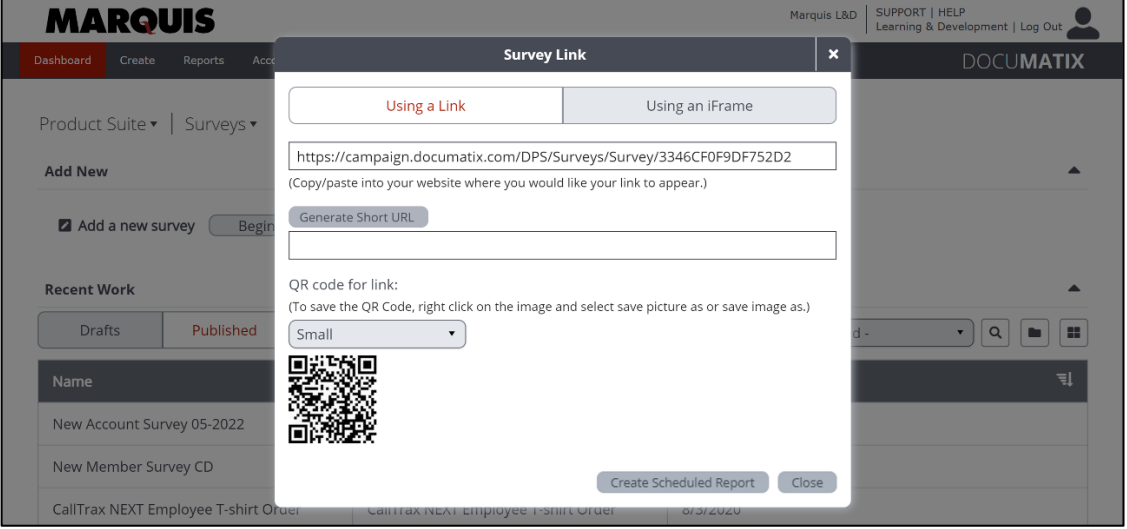
The screenshot shows the Marquis DocuMatix dashboard. At the top, there is a navigation bar with 'Dashboard' (highlighted in red), 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. On the right, it says 'Marquis L&D | SUPPORT | HELP Learning & Development | Log Out' with a user profile icon. Below the navigation bar, there are two dropdown menus: 'Product Suite' and 'Surveys', both with red arrows pointing to them. Under 'Product Suite', there is an 'Add New' button. Below that, there is a checkbox 'Add a new survey' and a 'Begin' button. The 'Recent Work' section has tabs for 'Drafts', 'Published', and 'Completed'. Below the tabs is a table with columns 'Name', 'Description', and 'Updated Date'. The table contains two rows: 'New Account Survey 04-2022' and 'Existing Members Survey'.

Step 3 Click on the specific survey and click **Publish**

The screenshot shows the same Marquis DocuMatix dashboard as in Step 2. In the 'Recent Work' section, the 'Drafts' tab is selected. The table has columns 'Name', 'Description', and 'Updated Date'. The first row is 'New Account Survey 05-2022', which has a red arrow pointing to it. A context menu is open over this row, showing options: 'Edit', 'Copy', 'Delete', 'Publish', 'Preview', and 'Send Sample'. The 'Publish' option is highlighted with a red arrow. The table also shows 'New Account Survey 04-2022' and 'Existing Members Survey'.

Step 4 Click **Yes**

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<p>Step 5</p>	<p>A Survey Link page will appear with all of the link information regarding the survey.</p>
	
	<p>If desired, there is an option to create a Scheduled Report for the survey. Move to the next step if that is something you would like to setup.</p>
<p>Step 6</p>	<p>Click Create Scheduled Report</p>
<p>Step 7</p>	<p>Complete Add Scheduled Report page</p>
<p></p>	<ul style="list-style-type: none"> • Report type
<p></p>	<ul style="list-style-type: none"> • Surveys
<p></p>	<ul style="list-style-type: none"> • Report name
<p></p>	<ul style="list-style-type: none"> • Email addresses
<p></p>	<ul style="list-style-type: none"> • Start date
<p></p>	<ul style="list-style-type: none"> • Expire date
<p></p>	<ul style="list-style-type: none"> • Frequency
<p></p>	<ul style="list-style-type: none"> • Days of the week
<p></p>	<ul style="list-style-type: none"> • Time of the day
<p>Step 8</p>	<p>Click Submit</p>
	