



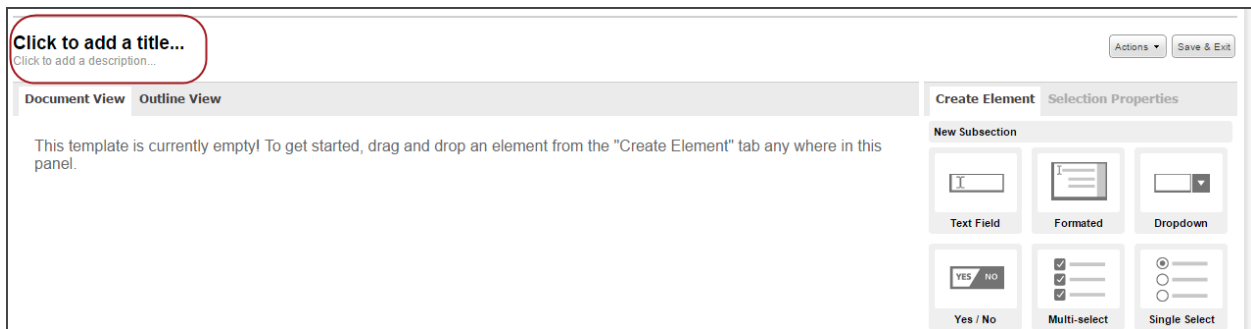
Template Design Tips

Thank you for your interest in Security Assessment Questionnaire. This document gives you design tips for creating your templates with the risk and compliance questions you want to get answers for – it's quick, easy and fast!

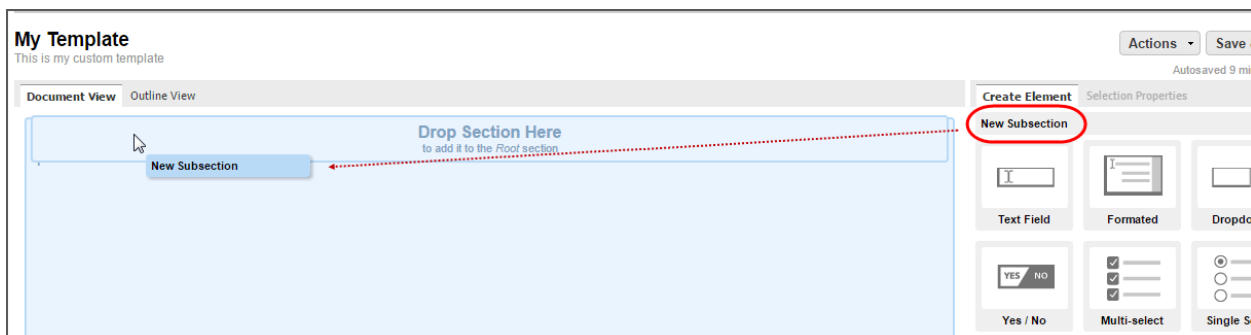
- ✓ Ask questions in a wide variety of formats – these are already configured and are ready to use!
- ✓ Get responses in any type of format you want – just drag, drop and you are all set to go!

Let's get you started...

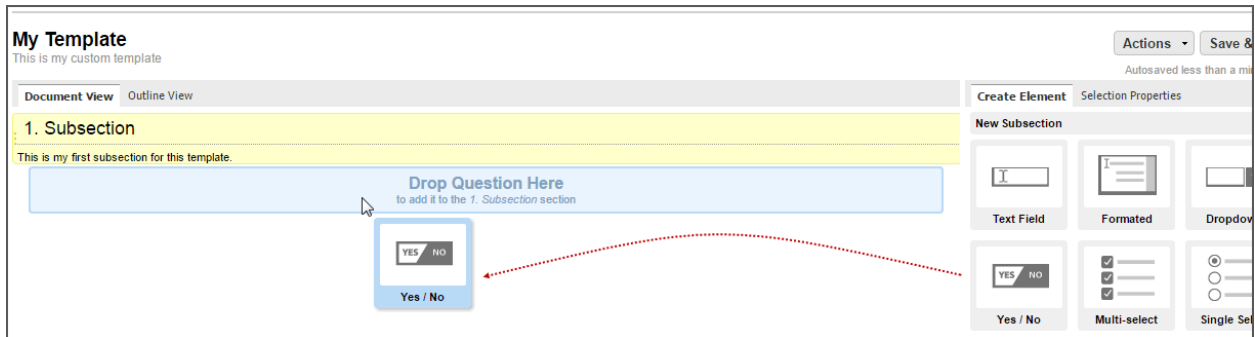
Simply navigate to Templates > My Templates > New Template > Blank Template. For the new template give a title and add description about the template you want to create.



It's easy to divide a complex template into subsections. Just click the Elements tab and drag the New Subsection element onto the template. Then add a title and description.

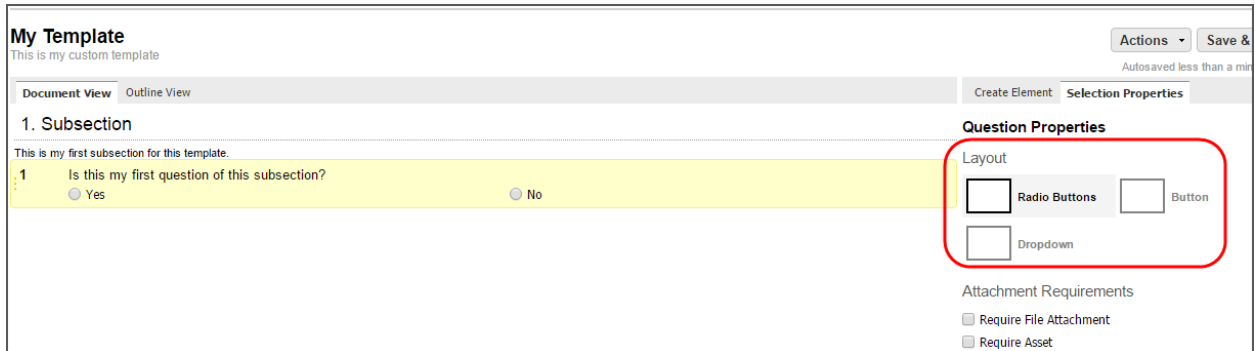


From Create Element, pick the answer format you want and drag and drop the format element to the Document View.



Customize the question properties from the Selection Properties.

Say, you select a Yes/No type of answer for your question, then select the look of your question. Should the answer buttons be radio buttons or dropdown and do you want attachments or comments with your answers, etc.



Would you like to design or review the template in tree view? Simply select Outline View and continue to drag and drop sections and questions to the template.



Similarly, add all sub sections and questions you want to the template.

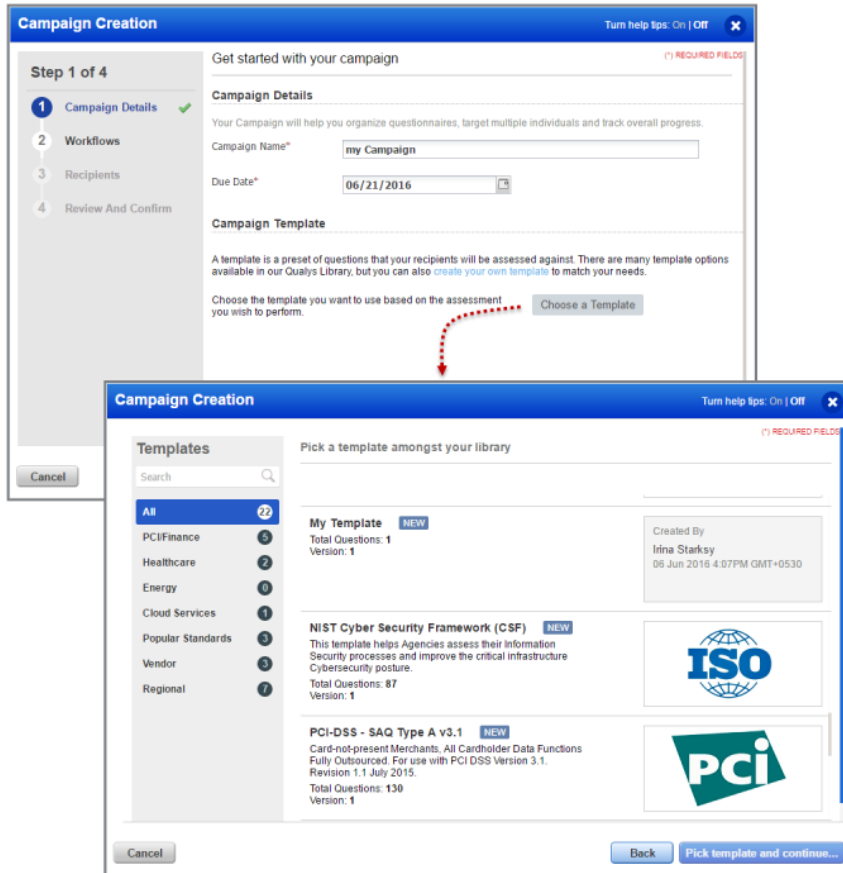
You can save your template at any time and return later to complete it. Just click Save & Exit!



After you are done click Publish from Actions.



That's it! You can start your campaign right away or send mail to all recipients at a later date and time.



Want to use templates from our library?

Simply use available templates directly from our library while creating campaigns.

Want to edit the template outside the product?

Sure, just export, edit, and import a template in XML format. Simply publish it once imported and it is ready for use.