Information

Zurich, 10 August 2022

Statistics

Getting started with eSurvey
Accessing user administration

Do you administer user accounts for more than one company?

If this is the case, you can have the SNB set up your eSurvey account in such a way that you can administer all of the companies from the same account, i.e. allowing you to access all of the user accounts via a single eSurvey account. To do so, please write to us at esurvey.support@snb.ch and let us know which companies you would like to be administrator for and the account to be used as your main account.

Below we set out how administrators can use the user administration function to view, amend and create contacts, accounts and responsibilities.

Step 1: Accessing user administration

After logging in to eSurvey at surveys.snb.ch, you will find the user administration function in the navigation panel on the left hand side.

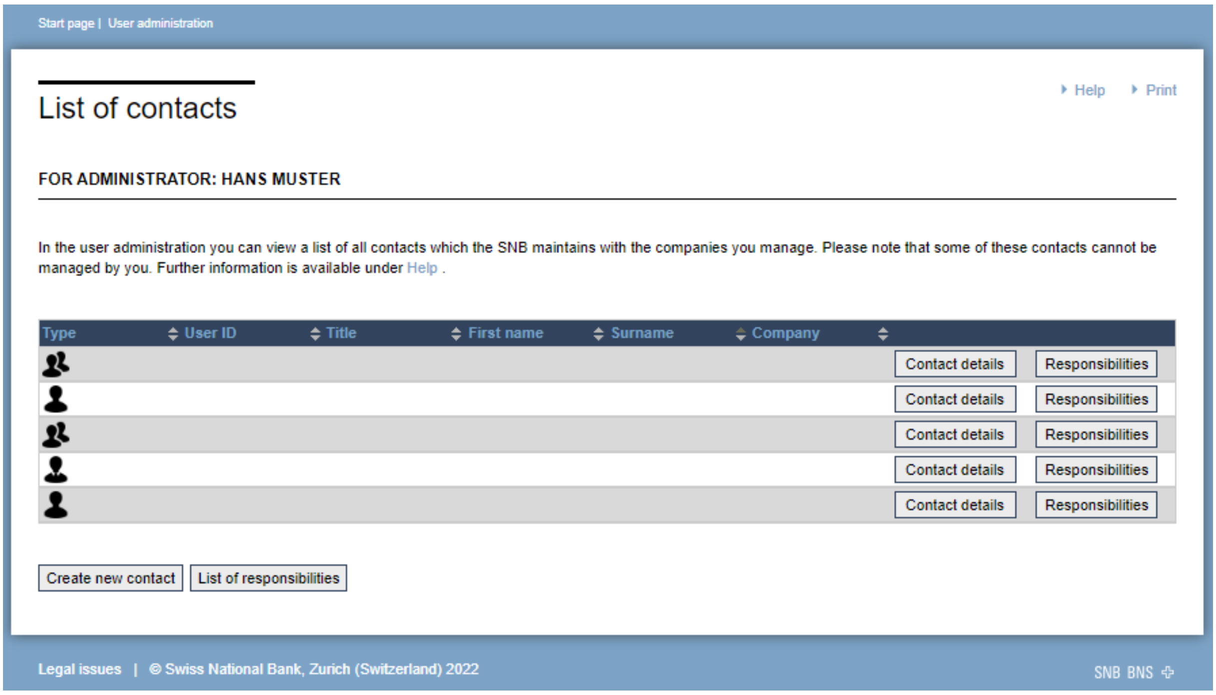


Fig. 1: List of contacts under User administration

Step 2: View, amend and create contacts

In the ‘List of contacts’ you can view all of the contact persons registered with the SNB for your company. Please check the contact details and amend them if necessary.

If you would like to add a new contact, please click on ‘Create new contact’ in the user administration (Fig. 1)

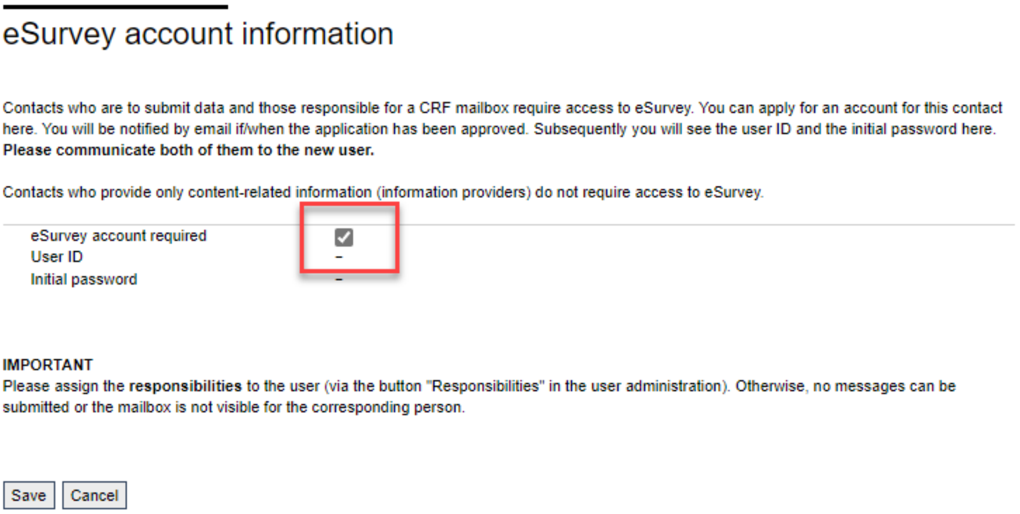
Step 3: Creating an account

Any new contact needs their own account if they are to submit reports via eSurvey or manage a CRF mailbox. In the ‘Account information’ section of the form, the ‘eSurvey account required’ box is ticked as default. Click on ‘Save’ to create the contact.

Saving a contact with the account-option generates an application, which the SNB will check and approve. You will be notified by email once this has been completed. It can take up to one day.

In the email, you will be asked to inform the new contact of their User ID and initial password. You can also find this information under ‘Account Information’ in the person’s contact details.

If a contact does not have to submit reports or manage a CRF mailbox, and is instead only to be registered as an information provider for specific surveys, they do not need an account. In such cases, you should untick the ‘eSurvey account required’ box before saving the contact details.



eSurvey account information

Contacts who are to submit data and those responsible for a CRF mailbox require access to eSurvey. You can apply for an account for this contact here. You will be notified by email if/when the application has been approved. Subsequently you will see the user ID and the initial password here. **Please communicate both of them to the new user.**

Contacts who provide only content-related information (information providers) do not require access to eSurvey.

eSurvey account required	☑
User ID	-
Initial password	-

IMPORTANT
Please assign the **responsibilities** to the user (via the button "Responsibilities" in the user administration). Otherwise, no messages can be submitted or the mailbox is not visible for the corresponding person.

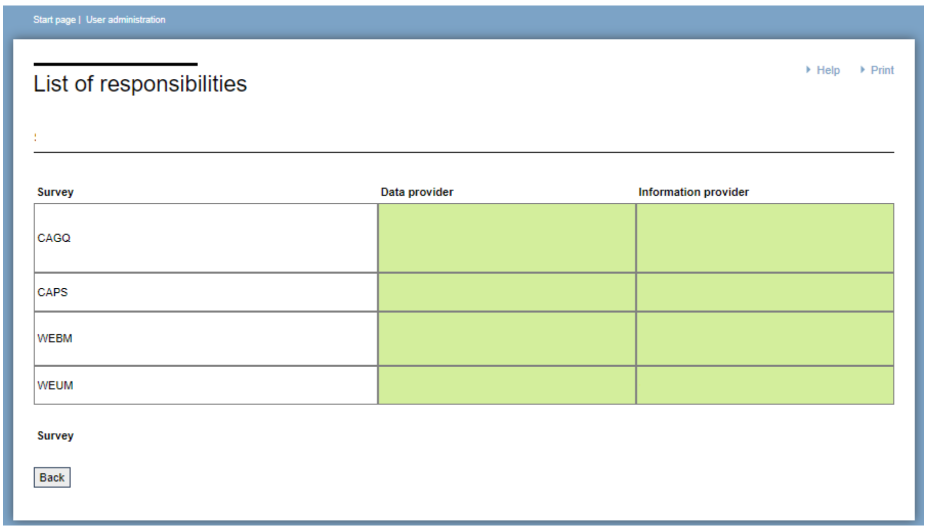
Save Cancel

Fig. 2 Account information, Create account, User ID and Initial password (only shown once the account has been approved)

Step 4: View, amend and allocate responsibilities

For a contact to be able to submit reports via eSurvey, they must be allocated the responsibility as data provider for the survey in question (this also applies for administrators).

The 'List of responsibilities' provides an overview of the responsibilities already allocated for all of the surveys your company is required to complete.



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List of responsibilities

Help Print

Survey	Data provider	Information provider
CAGQ		
CAPS		
WEBM		
WEUM		

Survey

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Fig. 3 Overview of all surveys to be completed and responsibilities

You can allocate responsibilities via the ‘List of contacts’ by clicking on the ‘Responsibilities’ button for the contact concerned. This opens the ‘Manage responsibilities’ form where you can tick the corresponding check boxes for the surveys in question. You can also allocate CRF mailbox manager responsibilities in the same way.

We recommend that you allocate the responsibilities as soon as possible after creating the contact. This avoids delays in submitting reports on time owing to rights not having been granted.

In the ‘Reports due and forms’ overview, data providers can see the current deadlines for the surveys they have been allocated responsibility for. We recommend that administrators allocate data provider responsibility to themselves for all surveys, as this will allow them to keep an overview of the current deadlines of all the reports to be submitted under ‘Reports due and forms’. If a survey is not allocated to any contact, it will not be possible to submit reports for this survey.

Responsibilities also need to be allocated if your company is newly required to report data for a certain survey. We will inform all administrators by email of any new or amended requirements with regard to reporting.

Further information is available under www.snb.ch, Statistics/Survey/Transmission of data files.