Survey Designer [.1917 - .2036]

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Create a New Survey Template | Review Respondents | Add Respondents to a Survey Template

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The Survey Designer tool allows a user to create survey templates containing questions and responses. These templates can be saved and re-used if the survey is a reoccurring event. After a survey is created and saved, it may also be accessed for editing and sending as tool rights allow of the appropriate user groups (*e.g.* teachers, secretaries, food service administrators).
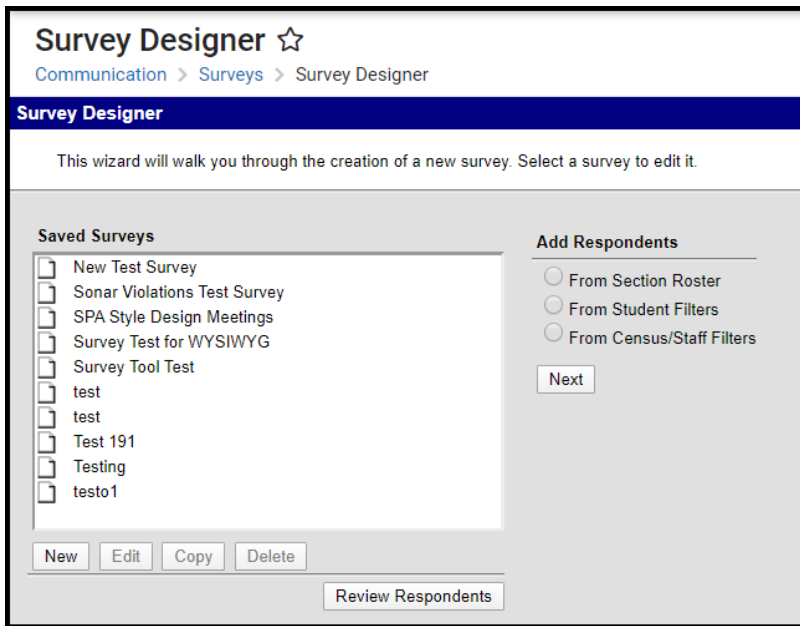
Survey Designer

Create a New Survey Template

Click the **New** button. A **Survey Detail** editor displays.
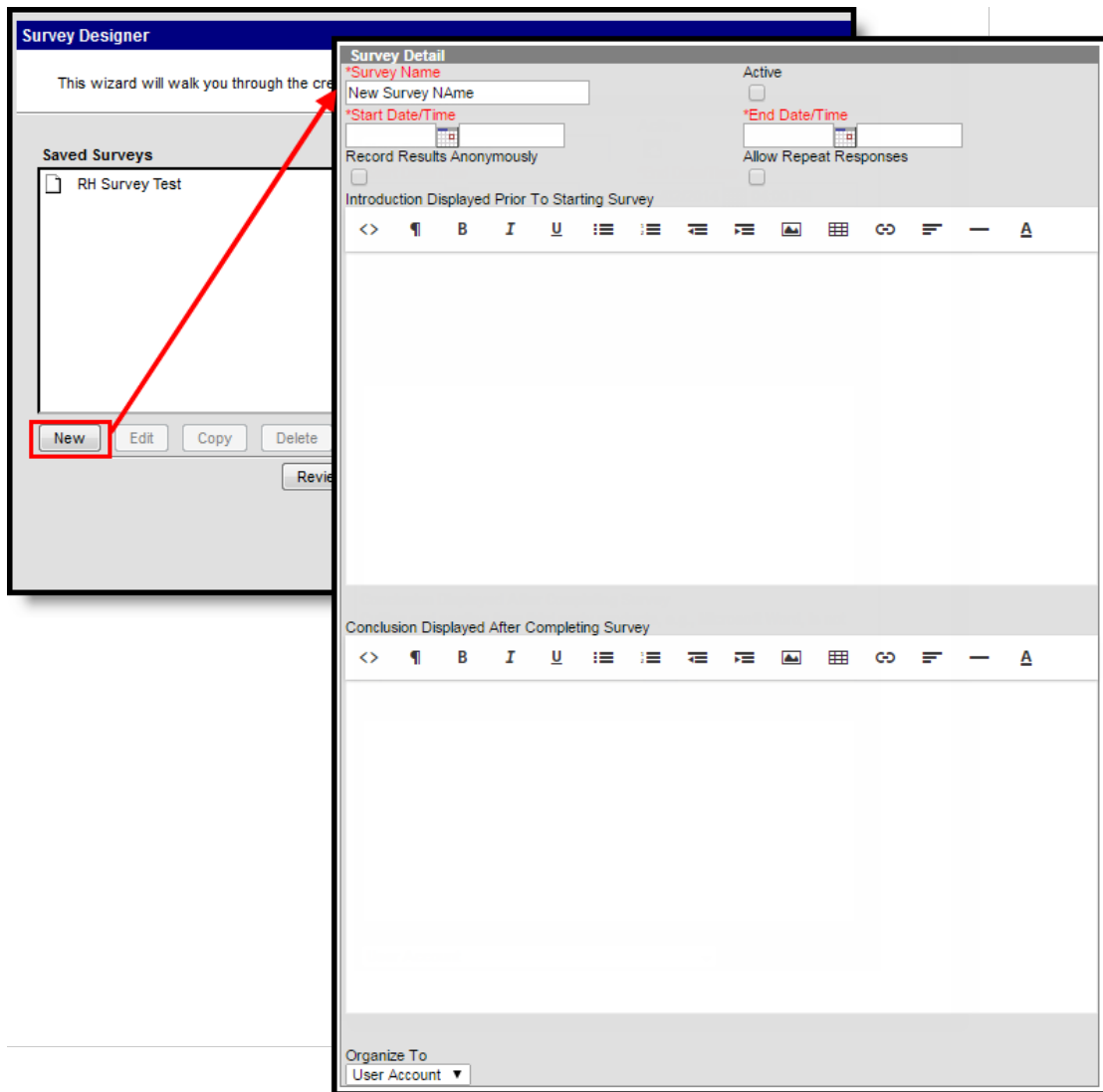
Survey Designer - New Survey

Enter Survey Detail Information

> See the Survey Detail Field Descriptions table for information on these fields.

1. Enter the **Survey Name**.
2. Determine if the Survey is **Active**.
3. Enter the **Start Date/Time**.
4. Enter the **End Date/Time**.
5. Mark the **Record Results Anonymously**, if desired.
6. Mark the **Allow Repeat Responses**, if desired.
7. Enter introductory text to the survey in the **Introduction Displayed to Starting Survey** text field.
8. Enter closing remarks to the survey in the **Conclusion Displayed After Completing the Survey** text field.
9. Click the **Save** icon when finished. The Survey Detail will be saved.

Once the survey detail is saved, pages can be added to the Survey Template.

Survey Detail Field Descriptions

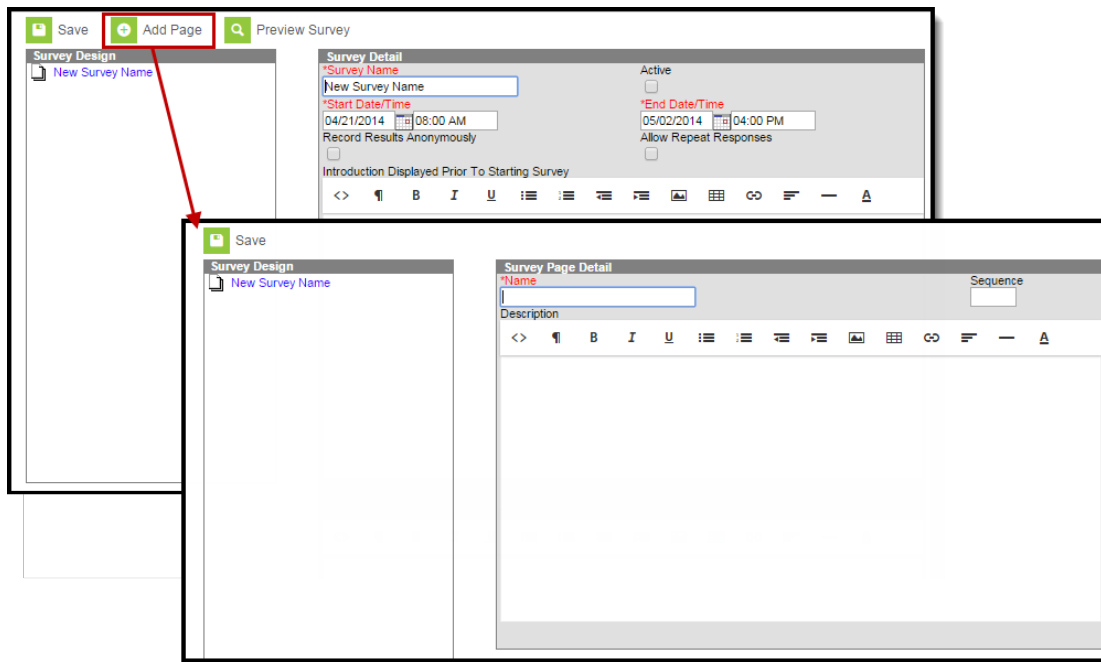| Field	Description
Survey Name *Required*	The name of the survey. This name is visible to those individuals taking the survey and is included in survey reports.
Active	When marked, the survey is active. Respondents may access, complete and return the survey. If this checkbox is not marked, respondents are not able to respond to the survey.
Start Date/Time *Required*	The day and time the survey is available for respondents. Dates are entered in *mmddyy* format or can be entered using the calendar icon to select a date. Time is entered in HH:MM AM/PM format or in HH:MM Military format.
End Date/Time *Required*	The day and time the survey is no longer available for respondents. Dates are entered in *mmddyy* format or can be entered using the calendar icon to select a date. Time is entered in HH:MM AM/PM format or in HH:MM Military format.
Record Results Anonymously	When marked, surveys will be submitted anonymously, without any identifying respondent information (personID). Respondents are alerted when surveys are recording anonymous results. The option to **Allow Repeat Responses** is not available as no identifying person information is retained after the survey is completed. If this checkbox is not marked, the respondent's personID is recorded with results. And, **Allow Repeat Responses** can be marked.
Allow Repeat Responses	When marked, the survey allows respondents to submit more than one response, should they decide to repeat the survey. Reports and extracts will display only the most recent submission. This option is not available if the Record Results Anonymously checkbox is marked, as no identifying personal information is retained after the survey is completed. A message indicating the survey can be taken multiple times displays at the top of the survey when this option is marked. Answers to previously answered questions are NOT overwritten. If this option is not marked, the respondent can only take the survey one time.

Field	Description
Introduction Displayed Prior to Starting Survey	The Overview/Introduction displayed to the respondent before beginning the survey. The WYSIWYG editor allows font formatting and the insertion of hyperlinks, tables and graphics.
Conclusion Displayed After Completing Survey	The ending remarks/conclusion displayed to the respondent upon completion of the survey. The WYSIWYG editor allows font formatting and the insertion of hyperlinks, tables and graphics.
Organize To	The user account/user group(s) to which the survey is assigned. If a survey should only be accessible to the main survey staff member(s) and the district administration, this field should be set to User Account. Options in this dropdown list include any group to which the current user belongs. Additional groups can be added after the survey is created.

Add Pages to a Survey Template

See the Survey Page Field Descriptions for information on these fields.

1. Click the **Add Page** icon. A **Survey Page Detail** editor displays.
2. Enter the **Name** of the Page.
3. Enter a **Sequence** for this page.
4. Enter the text for this page using the WYSIWYG editor to format the text accordingly.
5. Click the **Save** icon when finished. The new page will display in the Survey Design list as a folder.

Once a Survey Page is defined, add Survey Questions or add more Survey Pages.

Survey Designer - Add Survey Pages

Survey Page Detail Field Descriptions

Field	Description
Name	Indicates the page number or description of the questions it will contain. Required field.
Sequence	The order of this page in relation to other survey pages.
Description	The text or instructions that should appear at the top of the page. This is NOT the question for the survey, just a description or text for a group of questions that are included on the survey.

Add Questions to a Survey Template

See the Survey Question Fields Description for information on these fields.
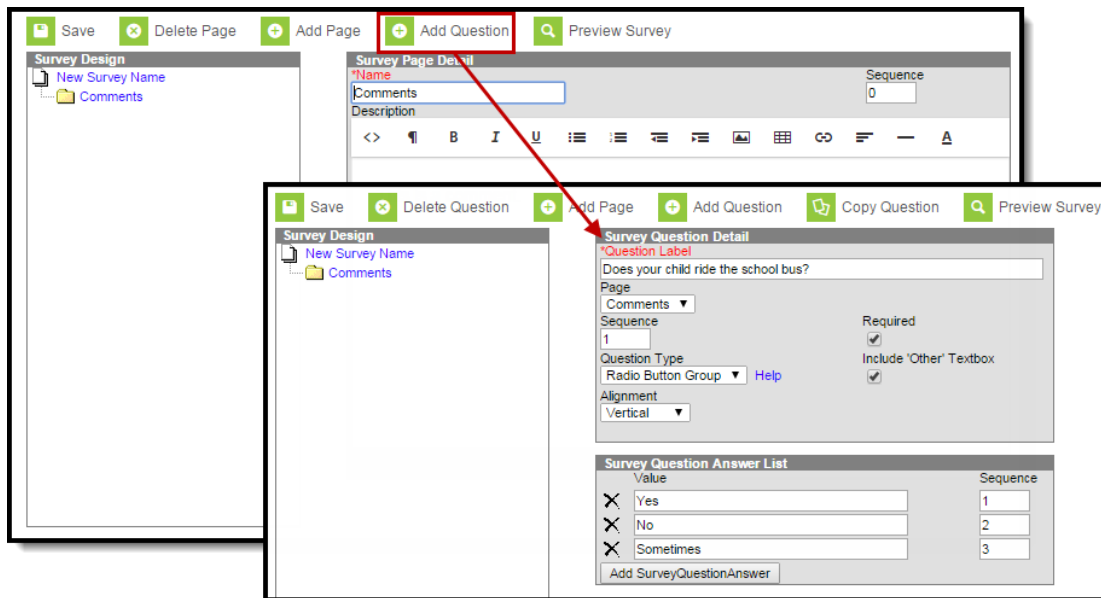
Survey Question Detail

1. Select the **Survey Page** where the survey questions should display.
2. Select the Add Question icon. A **Survey Question Detail** editor displays.
3. Enter the **Question Label**.
4. Select the **Page** for where this question resides. The Survey Page chosen is the default option.
5. Enter the **Sequence Number** for the question.
6. Mark the **Required** checkbox if a response to the question is required.
7. Select the **Question Type** option from the dropdown list.

Survey Question Answer List

> These fields are only applicable if *Radio Button Group* or *Checkbox Group* is set in the **Question Type** field of the Survey Question Detail editor.

1. Enter the **Value** for a possible response to this question.
2. Enter the **Sequence** of this value.
3. Click the **Add Survey Question Answer** button to add more fields for value and sequence.
4. Click the **Save** icon when finished.

After one or more pages are saved, questions can be added to them by clicking **Add Question** or Copy Question, which allows the question to be copied and then modified as desired.

Survey Designer - Add Survey Questions

Survey Question Fields

Survey Question Detail

Field	Description
Page	The page to which the question is assigned.
Sequence	The order of questions on the page, as related to other questions on the same page.
Required	If flagged, checkbox indicates survey respondent must complete the question or he/she will not be allowed to move to the next page.

| Field	Description
Question Type	The display format of the question. For more information on the functionality and formatting of options in this dropdown list, click the Help link. Question Type options include: • **Radio Button Groups** presents a list of answers from which only one choice can be selected. • **Check Box Groups** presents a list of answers from which multiple choices may be selected. • **Text Box** presents a field in which 50 characters of text may be answered. • **Text Area** presents a multi-line text field in which 2000 characters may be entered. • **Date Field** allows the entry of a date. • **Time Field** allows the entry of a time.
Help (link)	When link is clicked, a help menu expands to offer additional information on the **Question Type** dropdown list and **Include 'Other' Text Box** chexkbox. The **Help** link expands when clicked to list short descriptions of each Question Type option and basic information on question formatting.
Include 'Other' Textbox	If flagged, checkbox indicates that an **Other** text box will display as a possible answer to survey respondents. This allows the respondent to enter information that does not correspond with other available answers. Even if this checkbox is flagged, the **Other** will not display to respondents if *Text Box, Text Area, Date Field* or *Time Field* are set in the **Question Type** field.
Alignment	The direction on the page in which the answers will be listed. Selections set in the Alignment field will be ignored if *Text Box, Text Area, Date Field* or *Time Field* are set in the **Question Type** field.

Survey Question Answer List Editor

These fields are only applicable if *Radio Button Group* or *Checkbox Group* is set in the **Question Type** field of the Survey Question Detail editor.

Field	Description
Value	Possible answers to the survey question.
Sequence	Order in which the answer should display under the question.
Add Survey Question Answer	Click this button to add additional values for a multiple choice question.

Copy Questions to a Survey Template

This feature allows questions to be copied for quick editing. This is especially useful when all or many questions have the same responses (*e.g.* when the possible answers are often *Yes, No, Agree, Disagree,* etc).

1. Select **Copy Question** icon from the action bar. The question is copied to the same page as the original and will be renamed as "Copy of..."
2. Rename the **Question Label** as necessary, and determine where the copied question should display in the Survey.
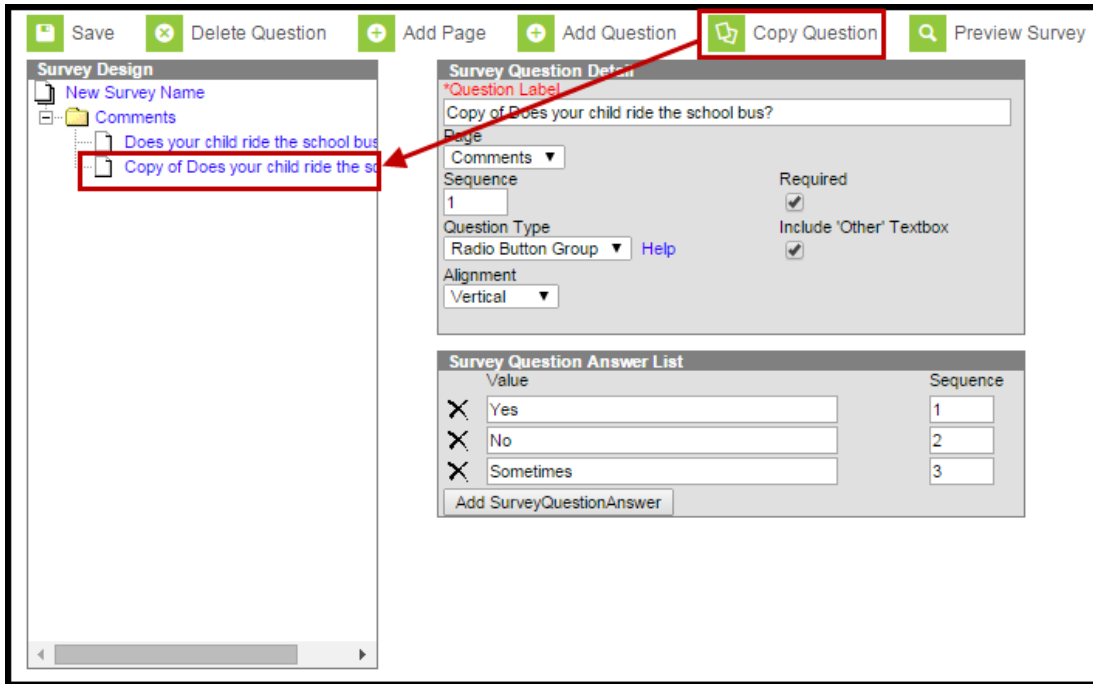
Survey Designer - Copy Survey Questions

Preview a Survey Template

When a survey template has been created, it may be previewed by clicking on the **Preview Survey** icon in the action bar. The preview pop-up will walk the survey creator through the pages and questions as they will appear to survey respondents. The preview is for review only. Completion of the preview survey will not count in survey results.
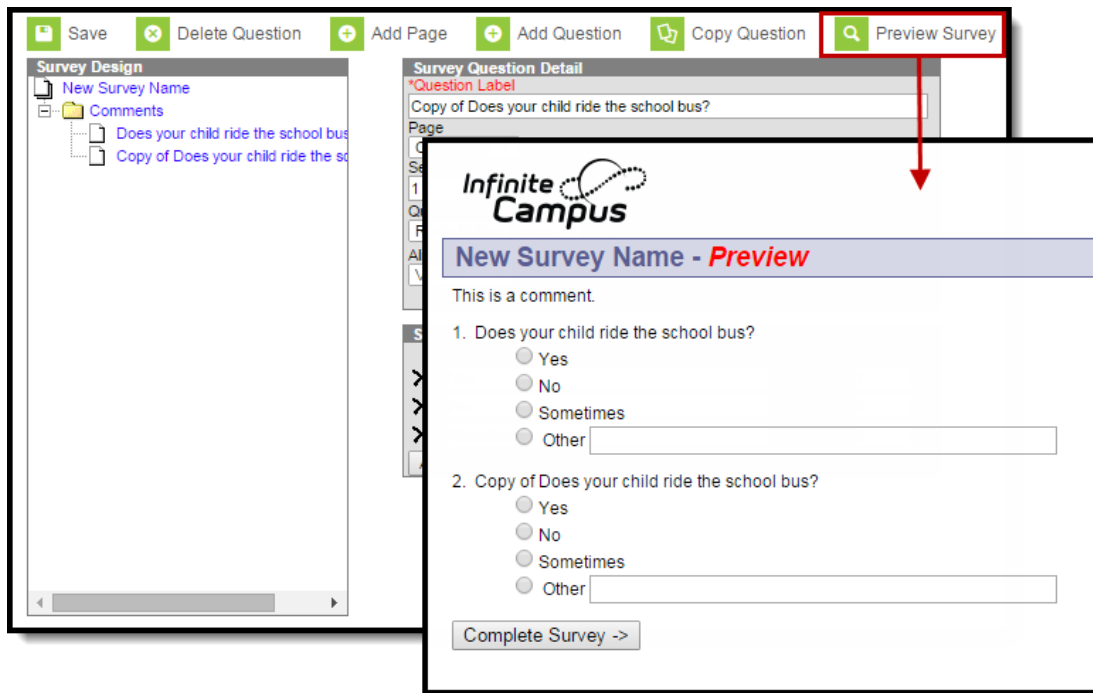
Survey Designer - Preview Survey Questions

At this point, the Survey has been created. Now, Respondents need to be added.

Review Respondents

After adding respondents to a survey, users can review the respondents included by clicking the Review Respondents button on the main Survey Designer screen. Totals of respondents are displayed. Respondent names are viewable by clicking the review link.
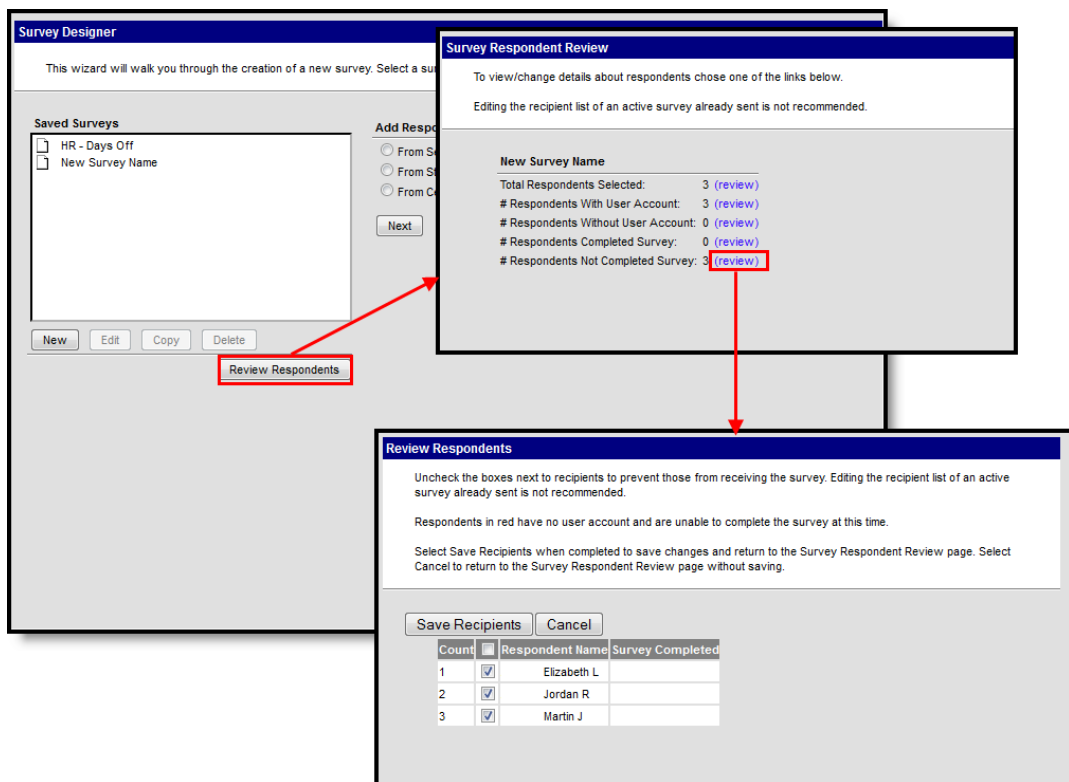
Survey Designer - Review Respondents

Add Respondents to a Survey Template

1. Select the **Survey Designer** from the outline.
2. Select the one of the radio buttons from the **Add Respondents** header:
    1. From Section Roster
    2. From Student Filters
    3. From Census/Staff Filters
3. Click the **Next** button.

A warning message displays if the survey is not active.

Add Respondents from a Section Roster

The process of adding respondents via the **From Section Roster** option only returns results for active students of the section currently displayed in the Campus Toolbar. When the Students button is selected, the active students of the section will display. When the Guardian button is selected, the active guardians will display under the active students of the section.

1. Select the desired **Year** and **School** from the Campus toolbar.

2. Select Respondents as **Guardians** or as **Students**.
3. Select the students from the left hand column to include in the survey by clicking their name. This action moves the name to the right hand column.
4. Mark the **Only add respondents with user accounts** checkbox if the survey should only be sent to those students or guardians who have Portal accounts.
5. Click the **Add Respondents** button when finished. A **Survey Respondent Review** screen displays, listing the number of respondents selected, respondents with and without user accounts, respondents who have completed and not completed the survey.
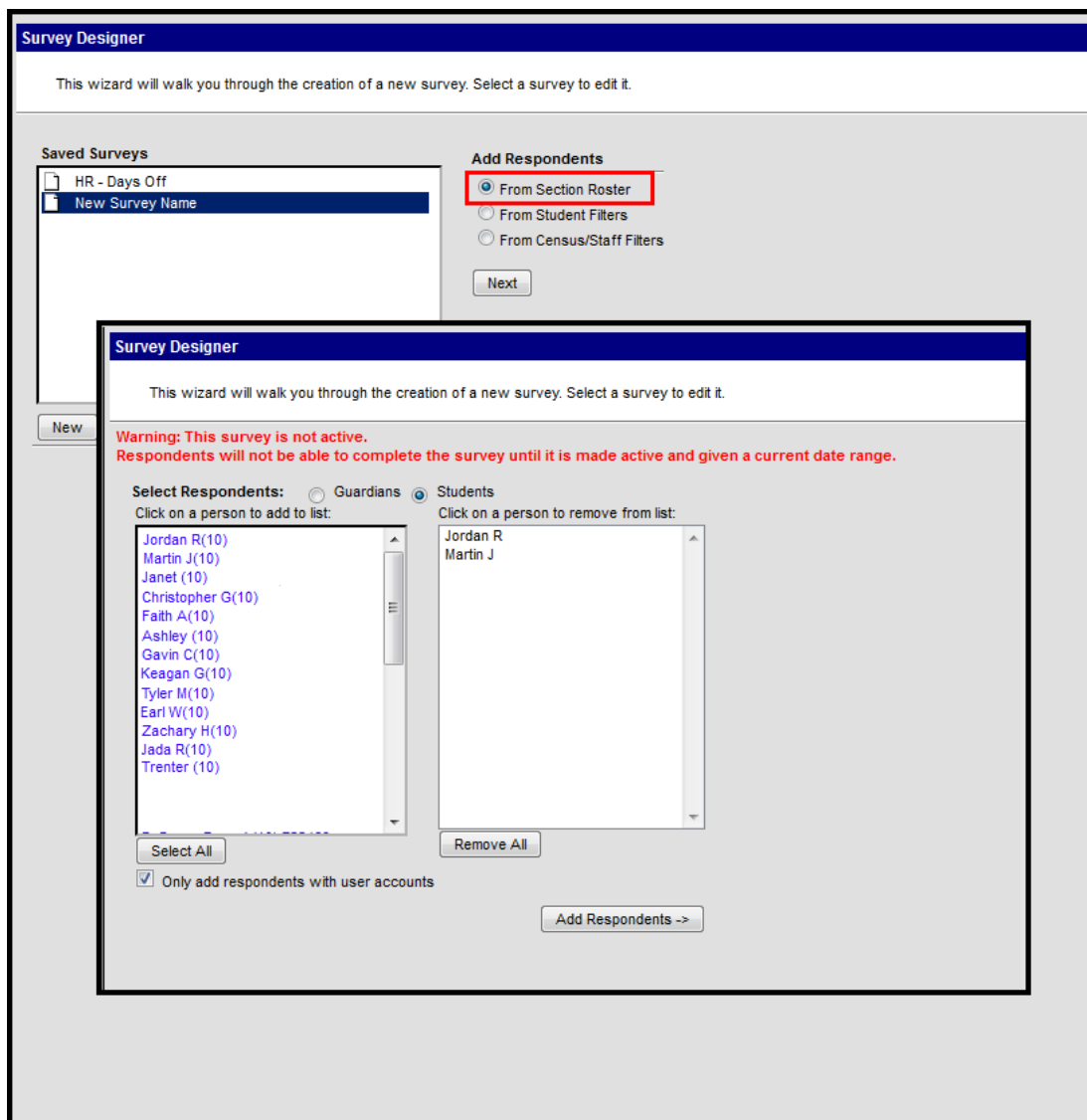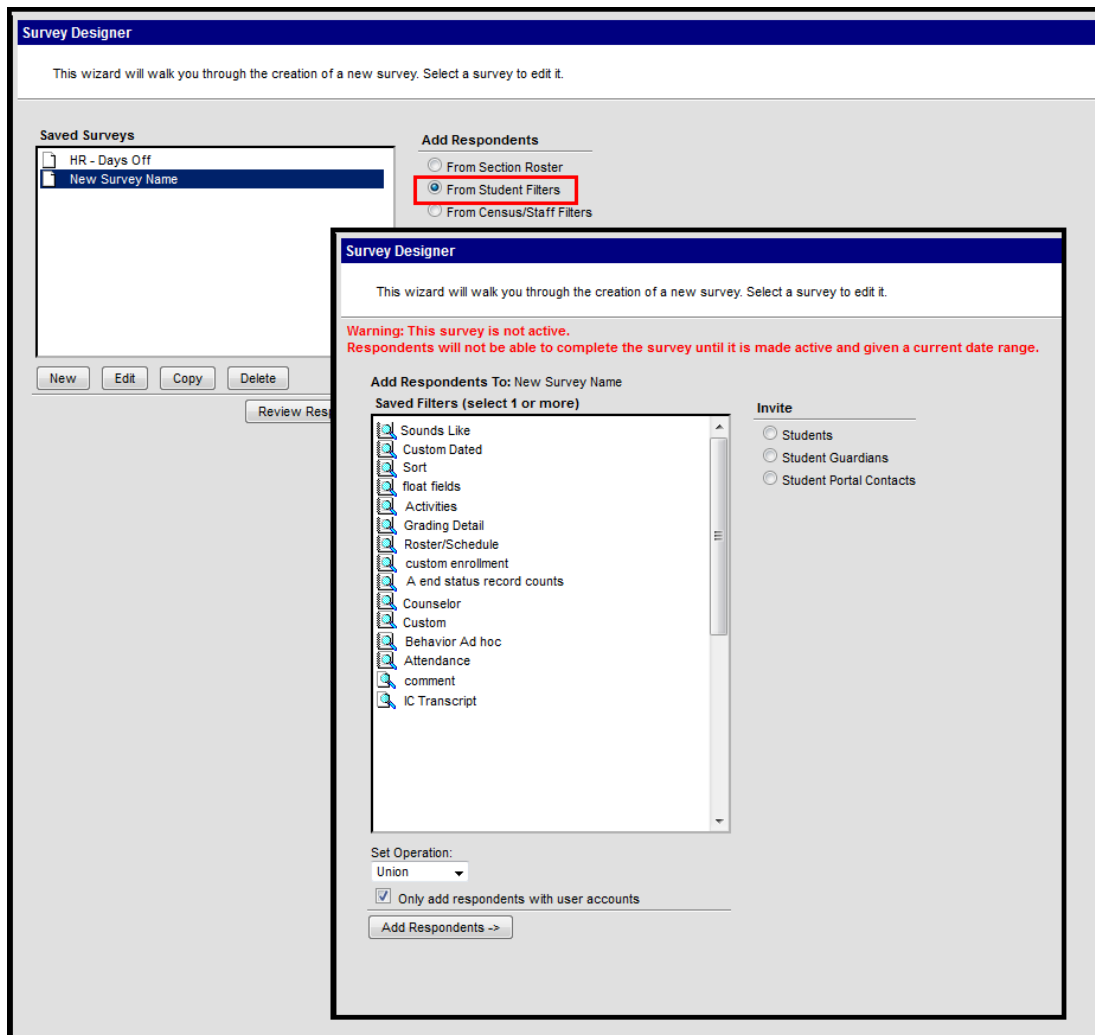

Survey Designer - Adding Respondents from a Section Roster

Add Respondents from a Student Filter

The process of adding respondents via the **From Student Filters** involves the use of existing ad hoc filters. A filter that includes the desired respondents must exist within the Filter Designer tool before this process is started or the filter will not exist for selection.

1. Select the **Filter(s)** to use.
2. Invite S**tudents, Student Guardians** or **Student Portal Contacts**.
3. Click the **Add Respondents** button. A **Survey Respondent Review** screen displays, listing the number of respondents selected, respondents with and without user accounts, respondents who have completed and not completed the survey.
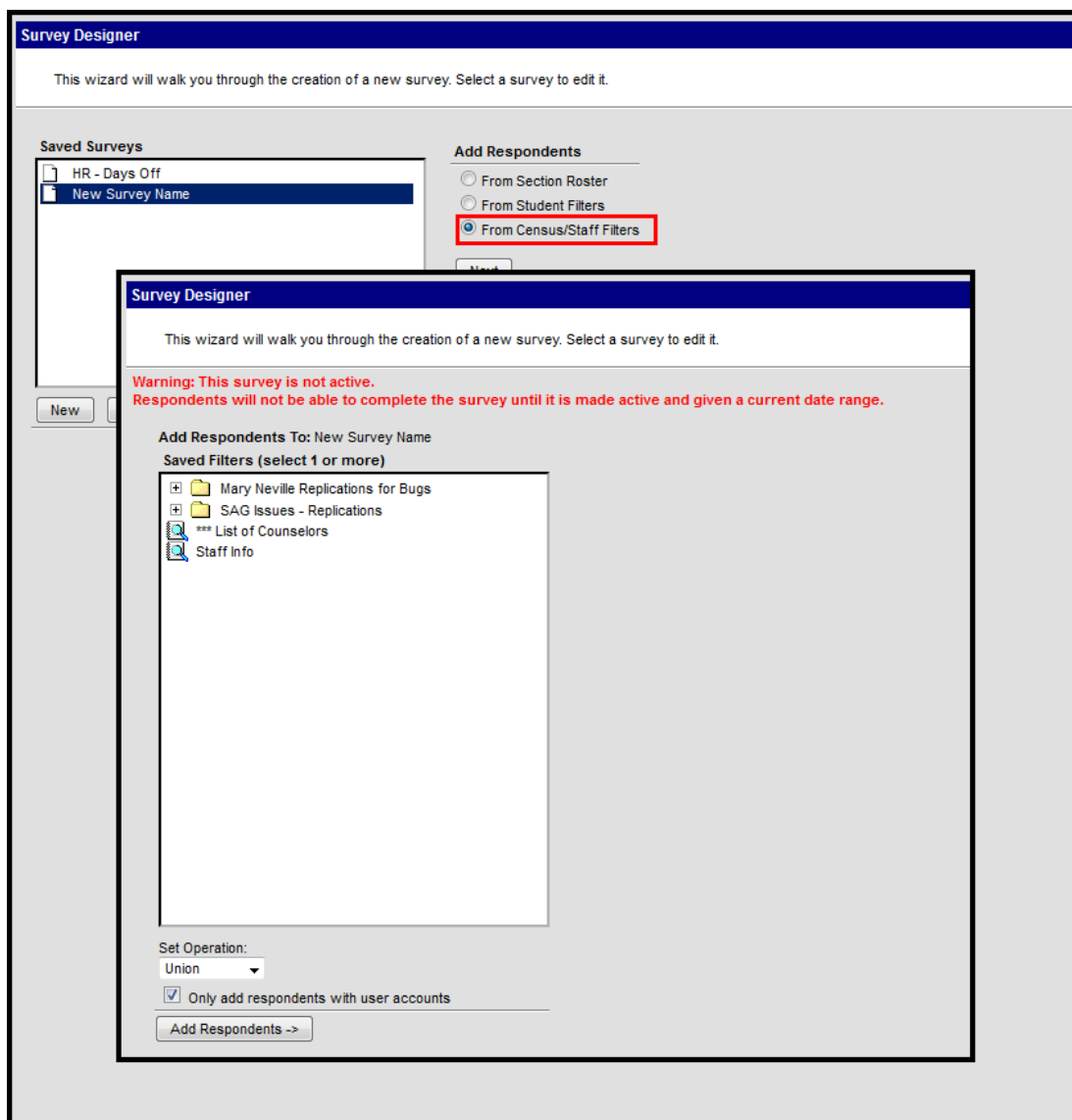

Survey Designer - Adding Respondents from a Student Filter

Add Respondents from a Census/Staff Filter

The process of adding respondents via the **From Census/Staff Filters** involves the use of existing ad hoc filters. A filter that includes the desired respondents must exist within the Ad Hoc reporting > Filter Designer tool before this process is started or the filter will not exist for selection.

1. Select the **Filter(s)** to use.

2. Select the **Set Operation** option. The Set Operation dropdown list specifics the way the filter will interact with respondents.
   - **Union**: (Default) Combines two or more filters by appending one to the other(s) to pull all results from those filters.
   - **Intersection:** Used to find only the data that is common to/shared between the selected filters.
3. Mark the **Only add respondents with user accounts** checkbox to only include those individuals who have portal accounts.
4. Click the **Add Respondents** button. A **Survey Respondent Review** screen displays, listing the number of respondents selected, respondents with and without user accounts, respondents who have completed and not completed the survey.

Survey Designer - Adding Respondents from a Census/Staff Filter