Subunit Administrator Side:

**Survey Set up:**

|  |
| --- |
| **Click on appropriate subunit** |
| If **user is not** created click on **Create New User** | If **user is created** already |
| * Select Instructor, click **Next**
* Fill in their First, Last name and email address
* (Only give them a login if you are wanting them to come into the system and make their own surveys. Otherwise all users are inactive users and the random numbers that are default are what you use for the instructor login).
* Click **Next**
* Click **Save** (all default information on define the user rights is what you want typically).
* Select the number in the brackets **[#] under CO**
 | * Select the number in the brackets **[#] under CO**
 |
| * Then at the bottom of the screen select **Create new course**.
* Give the **Course /Survey a name** .
* **Program of Study** (this is optional but is helpful if you want to separate out surveys by different departments or units later)
* **ID** (No spaces and used to Import email address to this specific survey)
* Change **Evaluation Period** to specific semester with dropdown arrow. (201621, 201631, 201641) Semesters are the year and then the semester code 21-spring, 31-summer, and 41-Fall
* **Course Type**: Select best course type with dropdown arrow.
* **Location** (optional)
* **Enrollment**: # of people invited to take the survey. (If you don’t know the number you can leave it at 0.)
* Click **OK**.
 | * Then at the bottom of the screen select **Create new course**.
* Give the **Course /Survey a name** .
* **Program of Study** (this is optional but is helpful if you want to separate out surveys by different departments or units later)
* **ID** (No spaces and used to Import email address to this specific survey)
* Change **Evaluation Period** to specific semester with dropdown arrow. (201621, 201631, 201641) Semesters are the year and then the semester code 21-spring, 31-summer, and 41-Fall
* **Course Type**: Select best course type with dropdown arrow.
* **Location** (optional)
* **Enrollment**: # of people invited to take the survey. (If you don’t know the number you can leave it at 0.)

Click **OK**. |
| Now that you have your users and your course name/survey name set up. Now we can generate your survey.On the left side panel:* Click on Generate Surveys.
* Select the Subunit
* Select the Period
* Select the Course Type
* Select the Questionnaire (the abbreviation that you gave it when you first set it up.
* Select the course.
 |
| Now select how you would like to send your survey. (Paper, PSWD Based, or Single Password Based) |
| **PSWD Based** (most common and participants can only take the survey one and then the link no longer works.) | **Single Password based** (participants can take the survey unlimited amount of times) | **Paper Survey** (you are planning on printing the survey for them). |
| Select PSWD based.Check Use Time controlGenerate Surveys | Select Single Password basedGenerate Surveys | Select Hard Copy procedureGenerate Surveys |
| PSWD based.Once you click Generate Survey you will have a screen that has 4 edit tabs.**1.PSWD to respondents**:* It is defaulted to start at PSWD to respondents. Click on Activate.
* Copy and paste your list of emails into the box called “recipient”. (The emails do not need any commas or semi colons to separate them. They just need to be on a new line. If there are commas and semi colons you will need to delete them.)
* Then select the Date and time you would like to send out the initial invitation by clicking the calendar. First you will select the date and then click the calendar again to change the time. (To change the time either you will do a series of clicks OR you can click and drag your mouse left and right and the time will go up and down.)
* Change the Sender (email) to your departments email.
* Change the Sender (name) to department name.
* Change the Reference to something eye catching (aka the subject line).
* Edit email template: Must leave [DIRECT\_ONLINE\_LINK] this is what inputs the unique link for each person.
* Edit the body of the email. (Suggestion: DO NOT CUT AND PASTE. I have had several problems with cutting and pasting where people receive a whole lot of gibberish. We do not want this. Type the information in. However we have had limited success with using the note pad looking icon that says paste from Word. If you use this please test the survey with a couple people before sending out the final draft.)
* Click SAVE

**2. Online Survey Reminders*** Select Edit Online Survey Reminders.
* The click Activate
* Select the Date of the first reminder by using the Calendar.
* Then you can choose to have a single reminder or multiple reminders. (We have had success with sending surveys out on Tuesdays and having reminders every 3 days for 3 weeks. This also makes the reminders not to land on a Saturday.)
* Change the Sender (email) to your departments email.
* Change the Sender (name) to department name.
* Change the Reference to something eye catching (aka the subject line).
* Edit the body of the email.
* Click SAVE

**3. Response Rate Notification*** OPTIONAL-Response Rate Notification. This is used if you want a reminder if the response rate is low. If you want to use this click Activate. If not skip this section.

**4. Finish Survey*** Click Activate
* Choose the Date and Time you would like the survey to end.
* I recommend NOT checking the box “Automatic report dispatch”
* Then Click SAVE.
* Then either click Back (at the bottom of page) or click on your folder on the left.
 |
| Single Password basedOn left panel:Select Display Surveys* Select the Subunit
* Select the Period
* Select the questionnaire
* Click Show
* Find recently created questionnaire.
* Click on the name of the survey
* Right column about half way down will have the link.
* Highlight link and copy it
* Then paste it into email, social media etc.
* You can also copy and paste QR code by clicking Download QR code for this survey under actions.

*(Optional: You can change the password by clicking change password under Actions.)* |
| For printing paper forms (Hard Copy procedure) please contact the Office Of Institutional Effectiveness for more information. |