

# Manage Survey

Tools > Modules > Manage Survey

The Manage Survey tool gives Program Directors and Staff the ability to create a survey in OnCorps Reports that can be distributed to staff, program directors, regional coordinators, site supervisors, and AmeriCorps members. The survey tool allows Program Directors or Staff the ability to send a survey to any combination of the previously mentioned user levels.

To create a new Survey, select the *Add a New Survey* button.

Select the *Edit* button next to a survey to view or change the survey. Select the *Copy* button to create an exact copy of a previously created survey. Select *Results* button to view the current survey results. Select *Delete* button to delete a survey and all of the results associated with a survey.

The screenshot shows the OnCorps Reports web application interface. At the top left is the logo "OnCorps Reports™" with the tagline "On task. On time. Online." and a magnifying glass icon. At the top right, it says "Welcome Staff Staff" with links for "view/edit profile" and "logout". Below that, it shows "Logged in as: State Commission Staff | Test Program 2" and "State & Program Year: Testing | 2010-2011" with a "change" link. A navigation bar contains: HOME, TOOLS, MANAGE RECORDS, REPORTING, FINANCIALS, TIME TRACKING, DIRECTORIES, CALENDAR, and HELP. Below the navigation bar is a breadcrumb trail: Home > Tools > Modules > Manage Surveys. On the right side of the breadcrumb trail are "Page Tools" and "Create PDF" buttons. The main content area is titled "Manage Surveys" and features an "Add a New Survey" button. Below this is a table with two rows of survey data. Each row has columns for Survey Name, Status, Start Date, End Date, and four action buttons: Edit, Copy, Results, and Delete.

Survey Name	Status	Start Date	End Date				
Copy Of test this	Active	08/11/2011	09/05/2011	Edit	Copy	Results	Delete
test this	Active	08/11/2011	08/23/2011	Edit	Copy	Results	Delete

At the bottom of the page, there are links for "Program Web Site", "Calendar", "Resources", and "Help", followed by the copyright notice "©2010 Settanni+Co., Inc."

## Survey Properties Page

The *Survey Name* field is an internal name to help identify the content and will not be displayed to the survey participants. If you don't want the survey to display but do not want to delete it, you can make the content "Inactive" in the *Status* field. You can designate which program will see the survey by using the *Program* dropdown menu and selecting a program. The *Notification Page Text* field is the header that will display for the content of the survey on the participant's home page. The *Survey Start Date* determines when the survey will become active on the participant's homepage. The *Survey End Date* determines when a survey will no longer display on a participant's homepage. Keep in mind, when a participant submits a survey it will no longer display on their homepage regardless of the start and end dates. You can designate who will or will not see the content by their position: Staff, Program Director, Regional Coordinator, Site Supervisor or Member. To distribute a survey to a user level select the *Yes* radio button next to *Staff Survey*, *Director Survey*, *Coordinator Survey*, *Supervisor Survey* or *Member Survey*. If you do not want a survey to be distributed to a particular user level, select the *No* radio button next to the user level. In the *Intro Text* field, you can provide a set of instructions or information at the beginning of the survey. In the *Thank You Page Text* you can enter in text that will display after the survey has been submitted.

## Survey Properties

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You are editing Survey: Copy Of test this

Survey Name:	<input type="text" value="Copy Of test this"/>	Status:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Program:	Test Program 2		
Notification Page text:	<p>I would like you to fill out the following information so I can determine who is following instructions.</p>		
Survey Start Date:	<input type="text" value="05/11/2011"/> <input type="button" value="9"/> (mm/dd/yyyy)	Survey End Date:	<input type="text" value="09/09/2011"/> <input type="button" value="9"/> (mm/dd/yyyy)
Staff Survey:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Director Survey:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Coordinator Survey:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Supervisor Survey:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Member Survey:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
Intro text:	<p>Please take this survey and submit it after completion.</p>		
Thank You Page text:	<p>Thank you for taking this survey. We will let you know the results after the survey deadline has passed.</p>		
<input type="button" value="Save and Print"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>			

## Create/Edit Questions

Before you can create a survey question you will need to create a list of *Survey Fields*. To create a survey field select *Add a New Survey Field*.

Select the *Edit* button next to the survey field to view or change the survey field.

The *Survey Field Name* is an internal name to help identify the content and will not be displayed to the participants. The *Field Type* determines what type of fields will be displayed to the participants. These fields include: *Checkbox, Multiple Select, Radio Button, Single Select, State List, Text, and Text Area*. *Checkbox* allows you to input a series of boxes that the participants may select. The participants may select one or many of the check boxes that are provided. *Radio Button* creates a list of options and allows the participants to make a single selection. *Single Select* provides a customizable drop down menu, and allows participants to make a single selection. *Text* provides a small text box that allows participants to provide a short text answer. *Multi Select* provides a scroll down menu that is customizable. The participants must highlight one or many of the fields to make a selection. To highlight many fields, the participant must hold the "Ctrl" button on their keyboard while making a selection. *Text Area* allows the participants to enter a narrative of up to 500 characters. *State List* is a drop down menu that allow participants to make a single selection from a list of all the states and provinces located within the United States of America. The *Values* field determines what will be included in the customizable *Field Types*. In order to separate the values, you must insert the | symbol after every value; this is illustrated in the figure below.

The screenshot shows a web application interface for editing survey questions. At the top, there is a navigation bar with tabs: HOME, TOOLS, MANAGE RECORDS, REPORTING, FINANCIALS, TIME TRACKING, DIRECTORIES, CALENDAR, and HELP. Below the navigation bar is a breadcrumb trail: Home > Tools > Modules > Manage Surveys > Create/Edit Questions. The main heading is 'Create/Edit Questions'. A secondary navigation bar contains links: Survey Properties | Create/Edit Questions | Manage Questions | Preview Survey | Survey Results. The text 'You are editing Survey: test this' is displayed. The main form area has a 'Survey Field Name' input field containing 'age'. Below it is a 'Field Type' dropdown menu set to 'Checkbox'. A large text area labeled 'Values: (use | delimiter for separating values)' contains the text '18-20 | 21-25 | 26-30'. At the bottom of the form are three buttons: 'Save and Print', 'Save', and 'Cancel'.

1. Textbox	<input type="checkbox"/> 18-20 <input type="checkbox"/> 21-25 <input type="checkbox"/> 26-30
2. Radio button	<input type="radio"/> Eggs and Bacon <input type="radio"/> Eggs and Steak <input type="radio"/> Eggs and Toast
3. Single Select	<input type="text"/>
4. Text	<input type="text"/>
5. Multi Select	<div style="border: 1px solid gray; padding: 2px;"> Amy ▲  Adam ▲  Ben ▲  Barb ▲  John ▼ </div>
6. Text Area	<div style="border: 1px solid gray; height: 150px; width: 100%;"></div> <p style="font-size: small; margin-top: 5px;">*500 Character Limit. If your answer exceeds 500 characters it will be cut short.</p>
7. State List	<input type="text" value="Select One"/>

After you have created your survey fields you can begin to add questions to your survey.

To create a new survey question, select the *Add a New Survey Question* button.

Select the *Edit* button next to a question to view or change the question. Select the *Delete* button to delete a question from a survey.

The *Survey Question* field is the question that will be displayed next to the survey field. The *Survey Field* drop down menu allows the surveyor to select from the survey fields that were previously created. Keep in mind, survey fields that are created are not universal, so you will need to set new survey fields for every survey that is created. The *Display Order* drop down menu lets you choose the order in which the survey questions will display, 10 being first, 20 second, and so on. If multiple survey questions have the same *Display Order* number, then there is no way to determine which will display first. The *Required Field* radio button allows the surveyor to select whether or not a survey question must be answered by the participants. After all the fields have been selected you must select *Save* to include a question in a survey. If *Save and Print* is selected, the survey question will be saved and a

PDF of the page will be created. This will allow the surveyor to print the *Create/Edit Question* page. The surveyor can also discard the question or changes made to a question by selecting the *Cancel* button.

**Create/Edit Questions**

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You are editing Survey: test this

<b>Survey Question:</b>	Please select the state you currently reside in.
<b>Survey Field:</b>	What State do you live in? ▾
<b>Display Order:</b>	10 ▾
<b>Required Field:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<a href="#">Save and Print</a> <a href="#">Save</a> <a href="#">Cancel</a>	

Survey Field	Field Type	Values	
What have you done to help the community?	Text Area		<a href="#">Edit</a>
What State do you live in?	State List		<a href="#">Edit</a>

## Manage Survey Questions

The *Manage Survey Questions* page allows the surveyor to re-arrange the survey question order. To move a question up on the survey select *Move Up*, to move a question down on a survey select *Move Down*.



Welcome **Test Person** [view/edit profile](#) | [logout](#)  
Logged in as: Program Director | Test Program  
State & Program Year: Demo | 2010-2011 [change](#)



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[Page Tools](#) [Create PDF](#)

### Manage Survey Questions

[Survey Properties](#) | [Create/Edit Questions](#) | **[Manage Questions](#)** | [Preview Survey](#) | [Survey Results](#)

You are editing Survey: [test this](#)

Order	Question	Survey Field	Field Type	
1	1. Textbox	age	Checkbox	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
2	2. Radio button	Breakfast Radio buttons	Radio Button	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
3	3. Single Select	Cabin List	Single Select	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
4	4. Text	memory	Text	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
5	6. Test Area	Who's your daddy and what does he do?	Text Area	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
6	5. Multi Select	Rommate Select List	Multi Select	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]
7	7. State List	State Drop Down List	State List	[ <a href="#">Move Up</a> ] [ <a href="#">Move Down</a> ]

## Preview Survey

On the *Preview Survey* page you can preview the contents of a survey. If *Create PDF* is selected, a PDF of the page will be created. This will allow the surveyor to print the *Survey Preview*.



Welcome **Test Person** [view/edit profile](#) | [logout](#)  
Logged in as: Program Director | Test Program  
State & Program Year: Demo | 2010-2011 [change](#)

- HOME
- TOOLS ▾
- MANAGE RECORDS ▾
- REPORTING ▾
- FINANCIALS ▾
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- DIRECTORIES ▾
- CALENDAR ▾
- HELP ▾

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Page Tools [Create PDF](#)

### Survey Preview

[Survey Properties](#) | [Create/Edit Questions](#) | [Manage Questions](#) | **[Preview Survey](#)** | [Survey Results](#)

You are editing Survey: **Member Development & Preparation**

test test test

Do you feel you are prepared for your service activities?

- Yes  
 No

What most prepared you for your service?

- Select one  
Test 1  
Test 2  
Test 3

trext

\*500 Character Limit. If your answer exceeds 500 characters it will be cut short.

## Survey Results

The *Survey Results* page displays up to date survey results. If *Create PDF* is selected, a PDF of the page will be created. This will allow the surveyor to print the *Survey Results*. The surveyor can also export a survey's results to a variety of different formats by selecting the *Export* button. These formats include: XML, CSV, TIFF, PDF, Web archive, and Excel.



Welcome **Test Staff 2** [view/edit profile](#) | [logout](#)  
Logged in as: **State Commission Staff | Test Program 2**  
State & Program Year: **Demo | 2010-2011** [change](#)

- HOME
- TOOLS ▾
- MANAGE RECORDS ▾
- REPORTING ▾
- FINANCIALS ▾
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[Home](#) > [Tools](#) > [Modules](#) > [Manage Surveys](#) > Survey Results

Page Tools [Create PDF](#) [Export](#)

### Survey Results

[Survey Properties](#) | [Create/Edit Questions](#) | [Manage Questions](#) | [Preview Survey](#) | **[Survey Results](#)**

You are editing Survey: [Copy Of Help](#)

Where were you born?	How old are you	What do you like for breakfast?	What type of cabin do you prefer?	How's your memory?	What's your favorite type of candy?	Which one of these people are your roommate?	What do you think of when you think of smores?	What state do you live in?	Whats your zodiac sign?
HealthCorps	26-30	Eggs and Bacon	North Woods Cabin	bad	Skittles, M&Ms, Gummy Worms, Reese's Pieces	Barb, John, Jess, Lou, Lily	Yum	Communities in Schools	taurus

# Survey Report

Tools > Modules > Survey Report

The *Survey Report* tool gives Program Directors and Staff the ability to view which participants have or have not completed a distributed survey. On the *Survey Report* page you will see a table: the columns represent the different participant user levels, the rows show the different surveys that have been distributed. The number that corresponds to a row and column represents the number of participants at any given user level that have completed and submitted the survey. Select the *Details* button next to a survey to view a full detailed report showing which participants have or have not submitted the survey. The participant has submitted the survey if there is a green check mark next to their name. The participant has not submitted the survey if there is a red “x” next to their name. Select the *Create PDF* button to create a printable image of the information contained in this page.



Welcome **Jason Stathom** [view/edit profile](#) | [logout](#)  
Logged in as: Program Director | Test Program 2  
State & Program Year: Testing | 2010-2011 [change](#)

HOME TOOLS ▾ MANAGE RECORDS ▾ REPORTING ▾ FINANCIALS ▾ TIME TRACKING ▾ DIRECTORIES ▾ CALENDAR ▾ HELP ▾

[Home](#) > [Tools](#) > [Modules](#) > [Survey Report](#)

Page Tools Create PDF

## Survey Report

Survey	Staff	Program Director	Regional Coordinator	Supervisor	Member	
Copy Of test this	0	0	0	0	1	<a href="#">Details</a>
test this	0	0	0	0	1	<a href="#">Details</a>

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### Survey Detail Report

Detail Report for Survey: **Member Development & Preparation**

#### Members

Member	Program	
Carol Murphy	Test Program	✓
Carol murphy 2	Test Program	✗
Chris Black	Test Program	✓