Dynamic Survey Builder and the CMS

Creating a Survey

1. Contact Suzanne Sprouse to request access to the online survey system.

2. Once access is granted, go to www.winthrop.edu/surveys.

3. Enter your Winthrop username and password, and then click “Login.”

4. The Dynamic Survey Builder page displays. Click “Create New Survey.”

5. Begin building the survey by completing the Survey Details page.
IMPORTANT: Survey Details Fields

While most are self-explanatory, a description of each is provided below:

A. **Survey Name:** This is the title of the survey. It will not appear on the survey. It serves as the file name.

B. **Description:** Describe the scope or purpose of the survey. The text will not appear on the survey. It is for record keeping purposes.

C. **Survey Header:** This text will appear at the top of the survey and could provide instructions or the survey’s purpose for the user.

D. **Status:** Choose “Active” to post the survey to the Web or choose “Inactive” to allow for posting the survey at a later time. **NOTE:** It may be a good idea to choose “Inactive” until edits to the survey are complete.

E. **Inactive Status Message:** Type the message that will display while the survey status is “Inactive” (e.g. Dr. Smith’s course survey currently is inactive. Please try back later.)

F. **Survey Footer:** This text will be displayed at the bottom of the survey (underneath the “Submit” button).

G. **Display:** There are three choices for this drop-down box.

1. **Custom Message:** If this option is chosen, enter the message that will display for the responder once the survey is completed and submitted. (e.g. Thank you for taking the time to complete the survey.)

2. **Bar Graph:** If selected, this option will display the current results of the survey in bar graph form to the responder once the “Submit” button is clicked.

3. **Percentage and Totals:** If selected, this option will display the current results of the survey in a percentage and totals format to the responder, once the responder has clicked “Submit.”

**NOTE:** Using option 2 and 3 will allow the user to see results of the survey responses to-date. This does not reflect the total, complete survey results.

H. **Display Survey Results to Public:**
If “Yes” is selected, the final results of the survey will be accessible for viewing on the Web. **NOTE:** Additional steps must be completed for this option. They will be addressed at a later point in the directions.

If “No” is selected, the final results of the survey will NOT be accessible to anyone on the Web.
I. User can submit only once:
If “Yes” is selected, the survey is restricted to Winthrop users only. To participate in the survey, users will have to enter a valid Winthrop username and password. This will limit them to accessing the survey only once. **NOTE:** If this option is chosen, important security steps must be followed. They will be addressed later in this document.

A selection of “No” to this option will **not** restrict the respondent to a username and password. It also allows any user to respond more than once.

J. Formatting Details:
Creators may choose to have each question numbered, have questions appear in bolded text on the survey, and choose to have a line displayed between questions.

![Formatting Details](image)

K. Color Details:

![Color Details](image)

Survey designers may also choose the color of the font, the color of error messages, and the graph display colors by entering the information in the corresponding text box.

L. Survey Button Text: The text on the Submit button may be edited here.

6. Click the “Save Details” button when you have completed the “Survey Details” page.

7. A display of the Survey Details page will appear with a menu at the top of the page. Edits may be made to the page if needed. (Click the “Save Details” button once edits are complete.) Next, click the “Question List” tab at the top of the page.

8. Click on the “Add New Question” button to add questions to the survey.
A. Select the question type from the drop-down menu:

B. In the box labeled “Question,” enter the text.

C. Select the formatting details for the question, then click the “Submit” button.

D. To add another question, click the “Add New Question” button.

E. Radio Button, Checkbox, and Select Box questions will require answer options to be entered.

F. Click the “Add Answer” button when all answer options are completed.

G. Creating Matrix Questions requires additional steps. These questions consist of a main question, with sub-questions that the responder will answer using the options provided.

An example is as follows:
Rate your satisfaction with the following:

- **course offerings**
  - Satisfied
  - Somewhat Satisfied
  - Not Satisfied

- **parking**
  - Satisfied
  - Somewhat Satisfied
  - Not Satisfied

- **meal plans**
  - Satisfied
  - Somewhat Satisfied
  - Not Satisfied

**Step 1.** Type your main question in the text box labeled “Question,” then click “Submit.”

**Questions Details**

<table>
<thead>
<tr>
<th>Position No.</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question Type</td>
<td>Matrix Question</td>
</tr>
<tr>
<td>Question</td>
<td>Rate your satisfaction with the following:</td>
</tr>
</tbody>
</table>

Submit
Step 2. Enter the sub questions by clicking “Add SubQuestion”.

### SubQuestion Details

<table>
<thead>
<tr>
<th>SubQuestion</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>course offerings</td>
<td>Update</td>
</tr>
<tr>
<td>2</td>
<td>parking</td>
<td>Update</td>
</tr>
<tr>
<td>3</td>
<td>meal plans</td>
<td>Update</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Add SubQuestion</td>
</tr>
</tbody>
</table>

Step 3. Enter the answer choices in the Answer Details Dialog Box then click “Add Answer” after each.

### Answer Details

<table>
<thead>
<tr>
<th>Answer</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Satisfied</td>
<td>Update</td>
</tr>
</tbody>
</table>
9. The Text Display Question will display a question but leave no room on the survey to answer it. This may be appropriate for questions that need to be submitted outside the parameters of the on-line survey.

10. When question entries are completed, click “Done.”

11. Once all questions have been entered, a list of the survey questions will be listed. At this point, questions may be edited by clicking on the “Edit” link beside the corresponding question. Questions may also be deleted by clicking on the “Delete” link beside the corresponding question to be deleted.

The order or position of the questions in the survey may be rearranged. To do this, place the cursor in the “Position” column beside the question to be moved. Enter the position (order) number you wish each question to appear on the survey. Click “Update Order” to finalize the reorganization of the questions.

**NOTE**: If only changing the order of two questions, be sure to renumber both questions.

12. Click the “Preview” link at the top of the page to preview the survey on the web.
Adding a Survey on a CMS Website

If edits are not necessary, the survey is ready to be posted on the web. In order to complete this step, the “Source Code” must be copied and pasted to a “live” web page or content block as is the case with the CMS. Complete the following steps to post the survey to a CMS website:


2. Within the Content area, create a new content block in the appropriate web folder. New/HTML Content

3. Title the content block with the survey name, then go to the code view by clicking the HTML icon at the bottom of the screen to view the code for that page.
4. Go back to the survey system and click on the “Source Code” link at the top of the page. Click the “Select All” button under the first block of source codes, then right click and copy the Source Code.

5. While in the HTML code view in the CMS workarea, paste the code from the Survey Builder into the popup box, then click the “OK” button.

6. Be sure to click the “Publish” button to activate the survey.
7. Identify the content block ID number and use that to build the survey’s URL.
   Ex. ID number 16565 → https://www.winthrop.edu/wu_nosearch.aspx?id=16565

**NOTE:** Be sure to create a link to the survey page from the appropriate web page or provide the web address to those who need to take the survey. The URL provided MUST begin with the secure protocol “https.”

Also, if the survey is updated/edited, the survey will automatically update on the web, eliminating the need to copy and paste the code again after the initial time.

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**Survey Results & the CMS**

To allow public access to current results of the survey, a new page must be created on the website hosting the survey page on the CMS.

1. Click to view the HTML code for the newly-created results page. In the survey builder, click on the “Source Code” link. Click the “Select All” button under the “Web Results” code window, right-click and select “Copy”.

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**Interview Questions:**

- What is the purpose of the survey?
- How will the results be used?
- Who is participating in the survey?
- How will the survey be distributed?
- What is the expected timeline for completion?
- Are there any incentives for completing the survey?

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**Additional Resources:**

- Survey tool user manual
- Survey tool help desk
- Survey tool training sessions
2. Within the CMS, create a new content block. After clicking on the html icon, paste the code as text then publish the page. **NOTE:** Be sure to create a link from the appropriate page for users to navigate to the results.

3. User can submit only once:

   If “Yes” is selected to the “User can submit only once” question, the survey is restricted to Winthrop users only. To participate in the survey, users will have to enter a valid Winthrop username and password. This will limit them to accessing the survey once. However, important security steps must be followed.

**Step 1:**
Return to the web page where the Source Code for the survey was inserted. Click on the html view icon. In the HTML code on the page, find the following line in the code.

http://www.winthrop.edu/surveys/generatepage.asp?survey_id=176

Add an “s” after “http.” The line should read as follows:

https://www.winthrop.edu/surveys/generatepage.asp?survey_id=176

**Step 2:**
View the survey page on the web. Click on the web address of the page, right click, and copy it.

**Step 3:**
Go to the page where the link for the survey is found. Right click on the hyperlink to the survey page and select “Set Link Properties” from the menu. In the URL box at the top of the hyperlink dialog box, paste the URL, then click OK, and publish the content block.
Step 4:
Go to the survey page. The prompt for entering the username and password should appear.

**NOTE:** Make sure the URL at the top of the survey page reads: “https://...” If it does not, the username and password of the responder enters will not be secure!

4. The creator of the survey may view the complete survey results and download the information into an Excel file for future analysis. To do this, go to www.winthrop.edu/surveys, log in and locate the appropriate survey. Click the “Edit” link, then click the “Report” link at the top of the page. This link will display the survey results. At the top of the page is an option to “Download results in Text File Format”. Click this option.

5. Next, click the “Generate Results File” button. By right-clicking on the icon and saving the results to a specific location, a copy of the results will be downloaded as a txt file. This file then can be inserted into an Excel spreadsheet.
Usage Support Rating Results -- View Results in Graph Format

Generated Files will be saved for this session only. They will automatically be deleted once you logout.

Please specify the Start Date and End Date

Please be careful before deleting the results for this survey. Once the results are deleted you will not be able to recover them.

Note: Right click on the icon and save the text file in your computer. Open the text file in Microsoft Excel as character delimited file (specify ~ as the delimiter).

<table>
<thead>
<tr>
<th>Filename</th>
<th>Right Click on the Icon &amp; Save this File</th>
</tr>
</thead>
<tbody>
<tr>
<td>byrdt_64_98201116.155.txt</td>
<td>![Icon]</td>
</tr>
</tbody>
</table>

Delete Results for this Survey