SURVEYS

Surveys User Guide

All Users

Cognia Improvement Platform

cognia®

Overview

The Surveys tool is part of the Cognia® Improvement Platform. For assistance with how to log in and access the Improvement Platform, please refer to that guide.

This guide provides instructions for users who are administering surveys.

Accessing the Survey Library

The Survey Library contains the Cognia Master Surveys that are available to be administered.
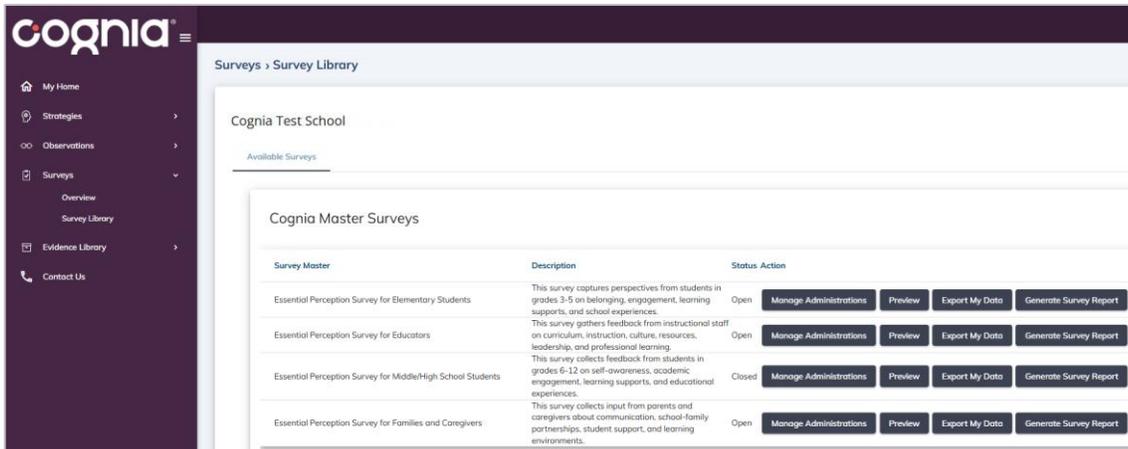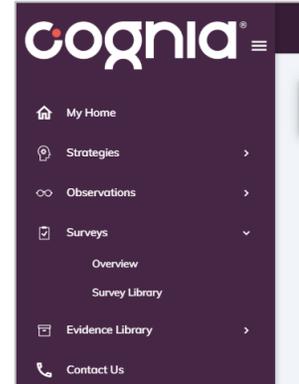
Follow these steps to access the Survey Library.

1. Select the **Surveys** menu from the left-side navigation.

2. Click **Survey Library**. This opens the Survey Library page (or if you have access to multiple institutions, first click the institution to open).

The Survey Library page displays a table with the master survey templates. The following columns are displayed: **Survey Master** (template name), **Description**, and **Status** (whether the template is active).

On the Survey Library page, you can:

- View the master survey templates available to be administered.

- Preview a survey by clicking the **Preview** button to the far right. This opens a read-only view of the survey in a new browser tab. (You cannot interact with nor edit the survey.)
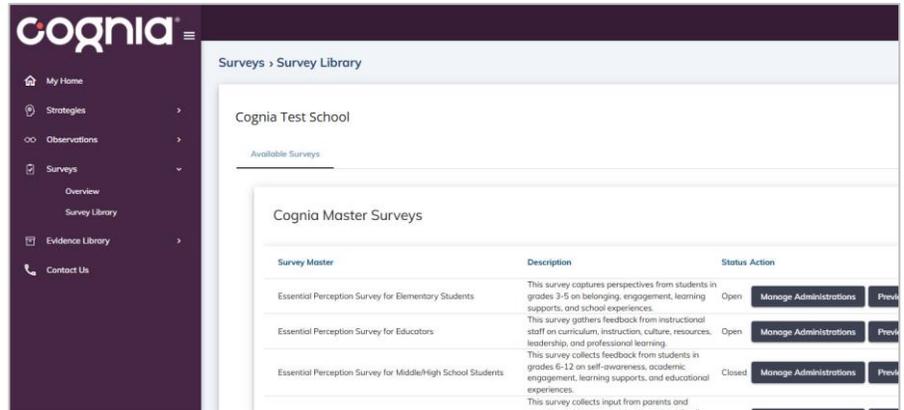
Accessing Survey Administrations

The Survey Administrations page for a survey template displays administrations created by users within your institution.

Follow these steps to access survey administrations.

1. Open the **Survey Library** page.

2. Find the survey you want to view or manage administrations for.

3. Click the **Manage Administrations** button to the far right. This opens the Survey Administrations page for that survey (or if you have access to multiple institutions, first click the institution to open).

The administrations page displays a table with the survey administrations created by users, separated into two different tabs.

- **Active Administrations**: Survey administrations created by users that are currently Active.

- **Archived Administrations**: Survey administrations created by users that are Final or Archived.

The following columns are displayed: **Title** (administration name), survey administration **Window**, number of **Responses**, **Status**, the **Link** to distribute to survey respondents, and whether the survey is **Active**.

On the Survey Administrations page, you can:

- View administrations and administration links.

- Create a new administration.

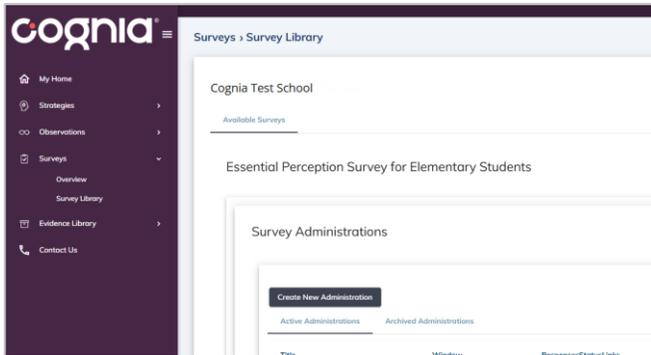- Edit and delete administrations.

- Export survey reports.
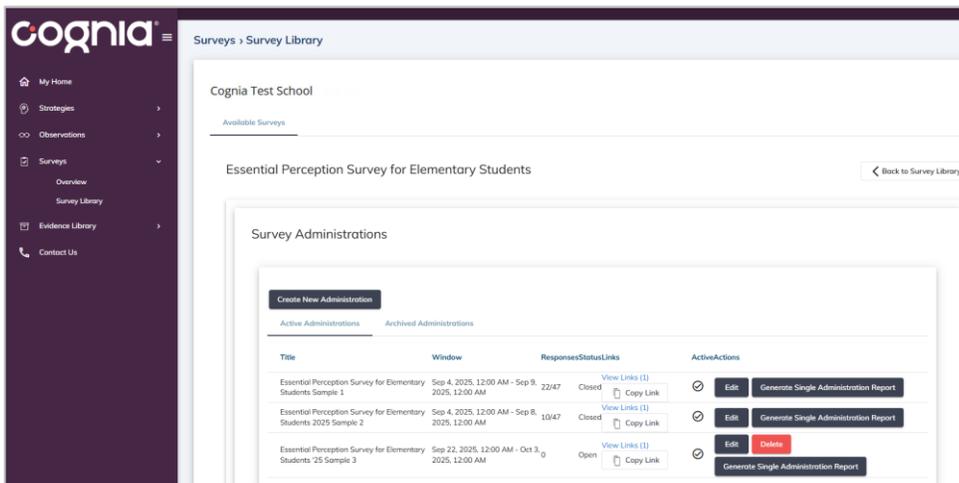
Creating an Administration

Follow these steps to create a new survey administration.

1. From the **Survey Administrations** page for the survey you want to administer, click the **Create New Administration** button. This opens a new administration.

2. Enter a **Survey Administration Name**. This name will be visible to survey respondents and will appear on reports.

3. The **Max Survey Entries** is set to 0 by default. If you do not want to allow an unlimited number of survey submissions, enter a maximum number to accept. This will also act as your target number of responses as you track completion.

4. Click the **Survey Open Date calendar** to select the date and time the survey will open or manually enter it.

5. Click the **Survey End Date calendar** to select the date and time the survey will close or manually enter it.

6. The **Active** checkbox is selected by default. If you do not want the survey to automatically open once the date is reached, uncheck this (you will need to edit the administration later to make it active).

7. Click the **Save** button. This creates the survey administration and returns you to the Survey Administrations page.

Accessing a Survey Link

Survey administration links must be manually sent out.

Follow these steps to access the link for a survey administration.

1. From the **Survey Administrations** page, find the administration you want to administer.

2. To copy the link: Click the **Copy Link** button to the far right.

3. To view and export the link: Click **View Links** to the far right. This opens an External Survey Link box.

   a. Click the **Export to Excel** button to export the link to an Excel file. When you are done, click the **Close** button.
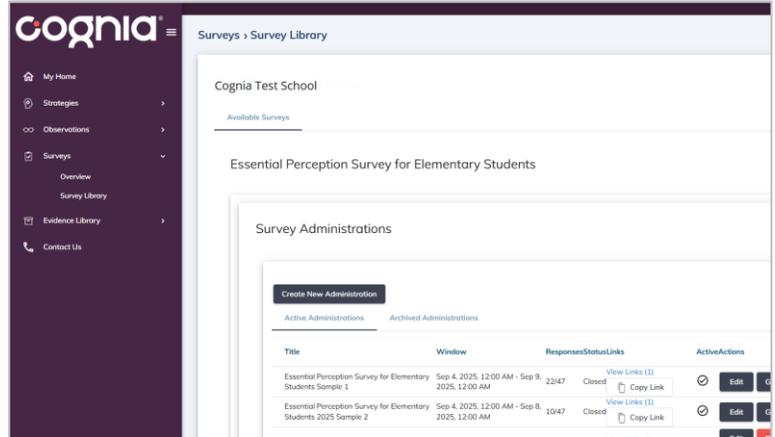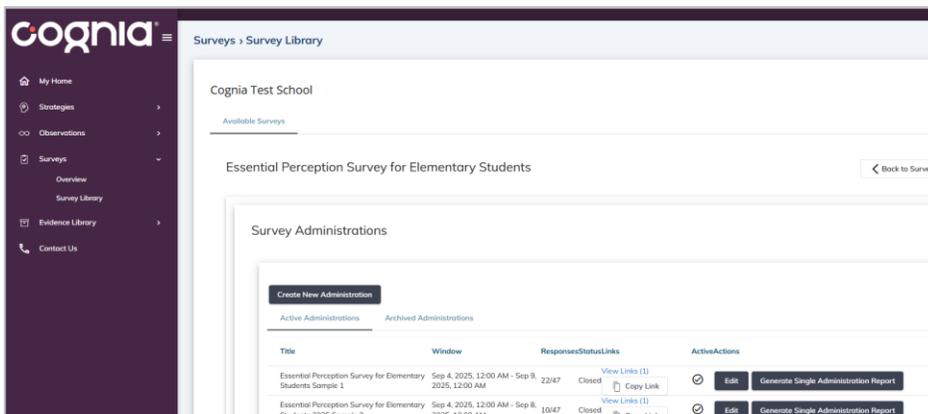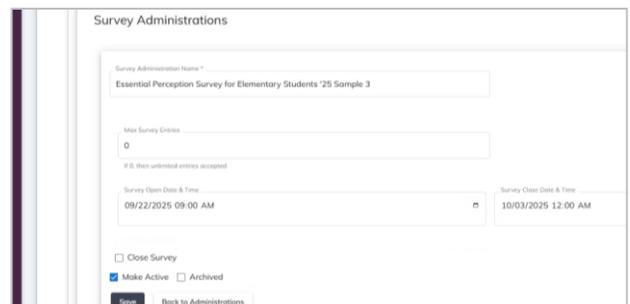

Editing an Administration

An administration cannot be edited once it has closed (the fields will be read-only).

Follow these steps to edit a survey administration.

1. From the **Survey Administrations** page, find the administration you want to edit.

2. Click the **Edit** button to the far right. This opens the administration.

3. Make edits to any of the information.

- To pause an open administration, uncheck the **Make Active** checkbox.

- To open or unpause an administration, select the **Make Active** checkbox.

4. When you are done, click the **Save** button. This updates the administration.
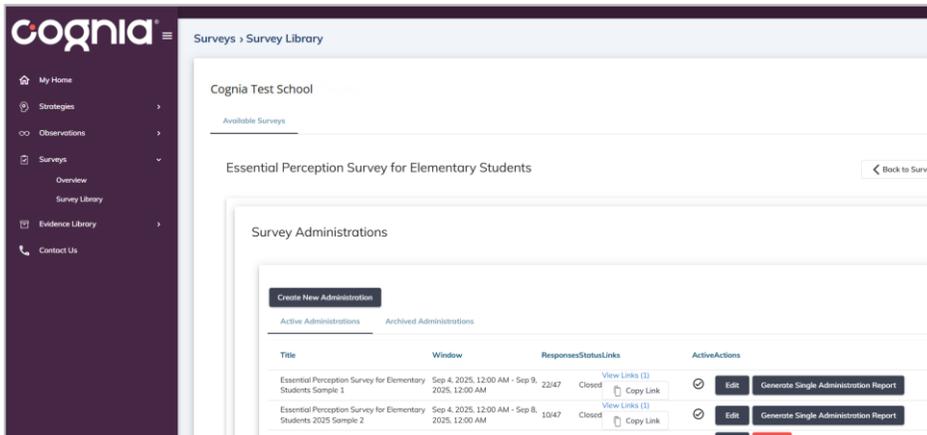
Closing an Administration

Closing an administration cannot be undone. Once an administration close date is reached, the administration is automatically closed. An administration can also be manually closed.

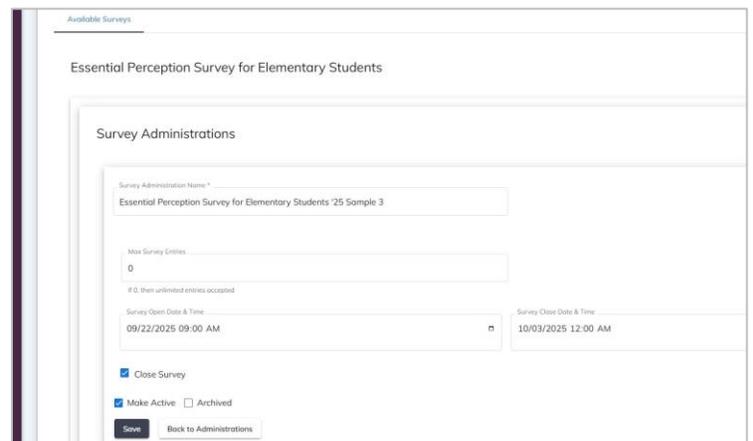Follow these steps to manually close a survey administration.

1.   From the **Survey Administrations** page, find the administration you want to administer.

2.   Click the **Edit** button to the far right. This opens the administration.

3.   Select the **Close Survey** checkbox.

   Note: The **Make Active** checkbox will remain selected but the survey will not be accessible to respondents. This allows the survey to be included in combined administration reports and exports. If the administration should be excluded from combined reports/exports, this box should be unchecked.

4.   Click the **Save** button. This closes the administration and the survey can no longer be accessed by respondents.
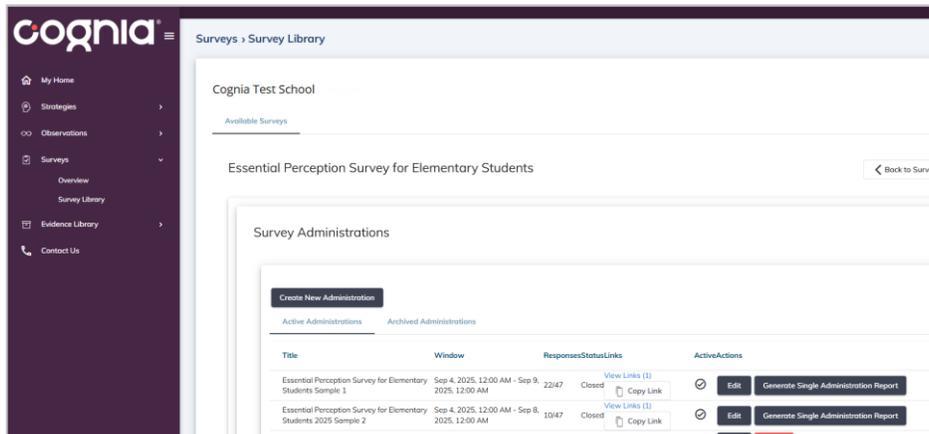
Archiving an Administration

Archiving a survey administration will remove it from the list of active administrations.

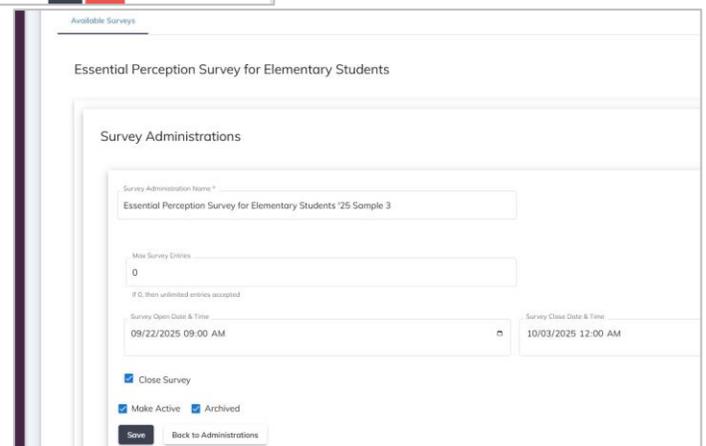Follow these steps to archive a survey administration.

1. From the **Survey Administrations** page, find the administration you want to archive.

2. Click the **Edit** button to the far right. This opens the administration.

3. Select the **Archived** checkbox.

   Note: The **Make Active** checkbox will remain selected but the survey will not be accessible to survey respondents. This allows the survey to be included in combined administration reports and exports. If the administration should be excluded from combined reports/exports, this box should be unchecked.

4. Click the **Save** button. This archives the administration and it is moved from the Active to Archived Administrations tab.
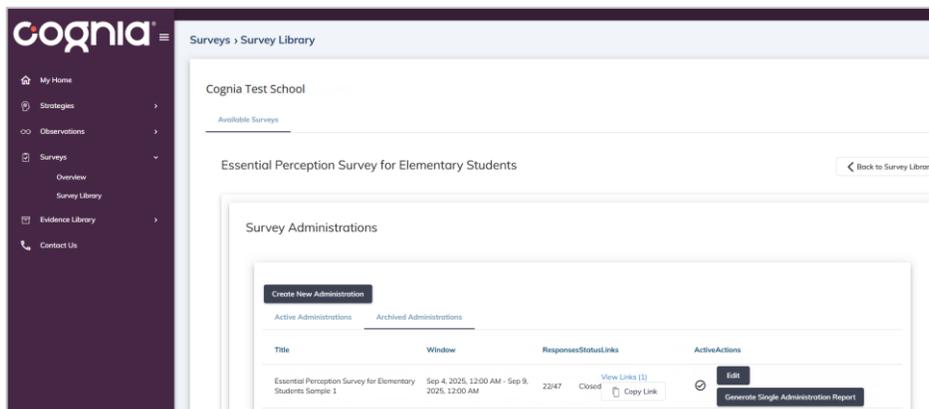
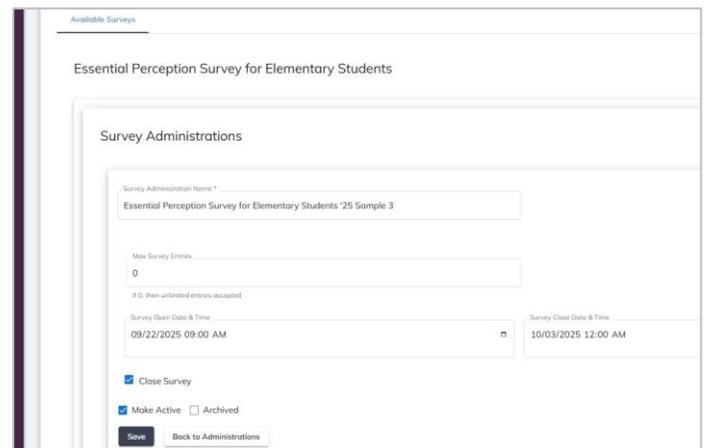# Unarchiving an Administration

Unarchiving a survey administration will add it back the list of active administrations.

Follow these steps to unarchive a survey administration.

1. From the **Survey Administrations** page, select the **Archived Administrations** tab.

2. Find the administration you want to archive.

3. Click the **Edit** button to the far right. This opens the administration.

4. Uncheck the **Archived** checkbox.

5. Click the **Save** button. This unarchives the administration and it is moved from the Archived to Active Administrations tab.

Deleting an Administration

An administration cannot be deleted once it has collected responses (there will not be Delete button).

Follow these steps only if an administration should be deleted.

1. From the **Survey Administrations** page, find the administration you want to delete.

2. Click the **Delete** button to the far right. This opens a confirmation box at the bottom of the page.

3. Click **DELETE** to confirm. This deletes the administration and it is no longer displayed in the list.

Downloading Survey Data

Survey administration data can be exported to PDF and .csv files from the Survey Library or from the Survey Administrations page.

Exporting Data from the Survey Library

Follow these steps to export survey data from the Survey Library.

1. From the **Survey Library**, find the survey you want to export data for.

2. Click the **Export My Date** or **Generate Survey Report** button to the far right. This downloads the file using the browser download functionality.

- **My Data:** Provides raw data results for all active and closed administrations for that survey template, with item responses and text responses for open-ended items. Downloads as a.csv file.

- **Survey Report:** Provides summary data results for all active and closed administrations for that survey template, with item and section averages. Downloads as a PDF.
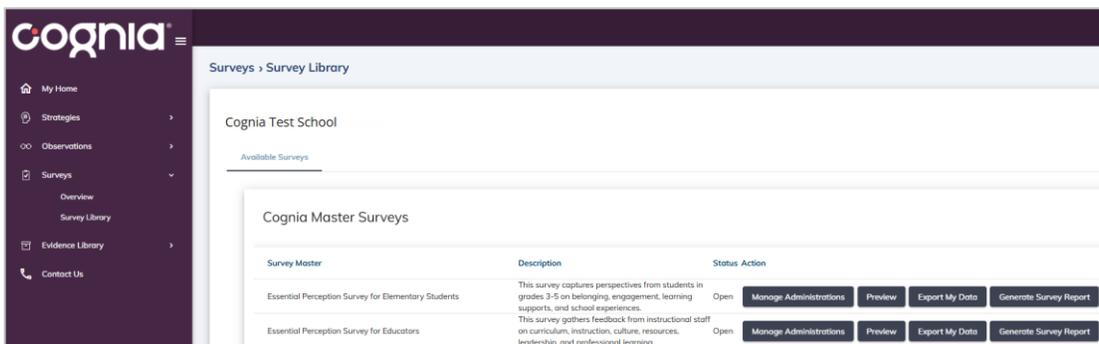
Exporting Data from the Survey Administration

Follow these steps to export survey data from the Survey Administrations page.

1. From the **Survey Administrations** page, find the administration you want to export data for.

2. Click the **Generate Single Administration Report** button to the far right. This downloads the file using the browser download functionality.

- **Single Administration Report:** Provides summary data results for that single administration, with item and section averages. Downloads as a PDF.