

Surveys – VSys Anywhere Fall 2022

There are two parts to showing your volunteers a survey when creating it in VSys Anywhere – creating the survey and linking it to VSys Live or VSys Live Kiosk.

Survey Creation

From **Survey (setup)** – Select **Create New**

Like most Setup options you will need to give it a **Description** (name), chose when it should display and where. There are filters for **Groups** and **People types**. There are also a couple options unique to surveys:

Usage: This defines where it is shown

Applicable to: This defines the circumstance when a volunteer will see it.

People – no other restriction, they can see it as long as they are logged in.

Checkin – When they go to check in for a shift, this will be available before.

Hours – When they go to check out from a shift, this will be presented.

Letters – Get a unique link to share in a letter.

The screenshot shows the 'Survey (setup)' form in VSys Anywhere. The form is titled '(new survey)' and has a navigation bar with links: Home, Reports, Dashboards, Person lookup, Schedules, Assignments, Hours, Tools, Letters, Slots, and Sign Out. The form fields include:

- Description:** Help Rename Our Pet Therapy Program
- Usage:** VSys Live/VSys Live Kiosk (dropdown menu)
- First date to show:** 09/16/2022
- Last date to show:** (empty)
- Applicable to:** xPeople (dropdown menu)
- User code:** RENAME
- Icon:** Megaphone (dropdown menu)
- VSys Live path:** (empty)
- Valid VSys Live sites:** (empty)
- After someone successfully completes this survey, send them to this URL:** (empty)
- Anonymous responses:** (checkbox)
- Allow general submission (not-logged-in users):** (checkbox)
- Use in full-screen mode on VSys Live with the "Surveys display" ("aggressive") tool:** (checkbox)
- Allow the same person to respond more than once:** (checkbox)
- Eligibility:** (empty)
- Required groups:** (empty)
- Required people types:** (empty)
- Required lists:** (empty)
- Visibility rules:** (empty)

The checkboxes in the middle define whether it is attached to a person, anonymous, or how persistent it will be for the volunteer to see it.

Tip: Make yourself a list with you and a couple people in your office for testing. Put this in the Required lists field. That will let you test without your volunteers seeing what you are trying.

Tip: Leave the date blank or set it to yesterday if it's not showing up for your testing.

Messages: There are several places to add explanations

Instructions – Text at top

Footer – Text at bottom

Thank you prompt – Shows when they complete it as a pop-up box

Message to show when unavailable – Usually “This survey is currently unavailable” maybe with contact info

Message to show if previously completed – Text when someone tries to complete it a second time.

Adding your questions:

Question: This is your text space for what you want to ask.

Type: This is the format for the answer. Most are self-explanatory, but the difference in offering choices

Ranked listing – Decide the order of best to worst

Select one answer from the list – One and only one answer

Select one of more answers from the list – As many answers as apply

Order: Which question is first

The screenshot shows the 'Response' editor in SurveyMonkey. The 'Question' field is highlighted in yellow. Below it is the 'Short description (for error messages)' field. The 'Type' dropdown menu is open, showing options like 'Date', 'E-mail address', 'Long text', 'Number', 'Number w/decimals', 'Ranked listing', 'Select one answer from the list', 'Select one or more items from the list' (which is selected and highlighted in blue), and 'Text'. The 'Order' field is set to '1'. At the bottom right are 'Save' and 'Cancel' buttons.

As always, **Save** as you complete things.

Linking to VSys Live/VSys Live Kiosk

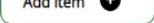
(This part may or may not be available to you depending on how your system/organization is configured. You may need to ask for Superuser Assistance for these steps.)

If you want your **survey on a menu** in VSys Live where you can get the link and ask people to fill it out then it needs to be added to the menu.

From VSys Live (Setup) -> Menus

If you look in your menus, you may already have an item for Surveys (all). This means any active surveys will show here.

The screenshot shows the 'Menu item' configuration window in VSys Live. The 'Description' field is set to 'Surveys'. The 'Order' is 13. There are checkboxes for 'Hidden' and 'Show only in the mobile (side) menu'. The 'Show beneath' dropdown is empty. The 'Icon' dropdown is set to 'Survey'. The 'Show to' dropdown is set to 'All visitors'. The 'Devices' dropdown is set to 'All devices'. The 'Kind' dropdown is set to 'Surveys (all)'. A list of menu items is shown on the left, with 'Survey' and 'Surveys (all)' highlighted. The 'Save' and 'Cancel' buttons are at the bottom right.

If this is not in your menu, use the  button at the bottom to add it.

If you want the survey to be presented **when a volunteer checks in or checks out** then it needs to be connected to the sign in/out Action Link.

VSys Live (Setup) -> Action Links (This is also for Live Kiosk)

Find the Self checkin/checkout Action Link. Near the middle will be options to add a survey.

The screenshot shows the 'Action Links' configuration window in VSys Live. The 'Required survey at checkin' dropdown is set to 'COVID Checkin'. The 'Simple survey at checkout' dropdown is set to 'Hours Feedback'.

Note: These are applicable to all people/sites using the action link. The Survey can be limited to a sub-set by defining a Group or Required list, but you can't have 2 checkin surveys. You would need two Action links.

Reporting

Like many types of reports in VSys you have options for a Detail report (specifics) or a Summary report (total and statistics) depending on what you need.

 My reports			
Survey Summaries			
Forward results	Properties	Finished; 10 records	09/19/2022 01:26PM
Run again			
Survey Result Details			
Forward results	Properties	Finished; 10 records	09/19/2022 01:25PM
Run again			