



# TracDat Version 4 User Reference Guide

# Data Tools Tab Questionnaires

This reference guide is intended for TracDat users with access to the Data Tools Tab and the Questionnaires sub-tab. This questionnaire building tool allows the user to create a questionnaire that can be distributed to multiple groups and the results are captured directly into TracDat. Please note that distribution of the questionnaire is accomplished separately from TracDat.

This reference guide will serve as a general introduction to the Questionnaire builder – here you will find a step-by-step walkthrough in addition to some definitions and explanations of its functionality and the edit screens. This guide is not intended to serve as a replacement for training and/or consultation on TracDat.

The information in this reference guide is organized according to the stock nomenclature that originally comes with TracDat. **Please be aware that your experience with TracDat may look slightly different than the screenshots below due to the software’s dynamic labeling feature and your specific institution’s configuration.**

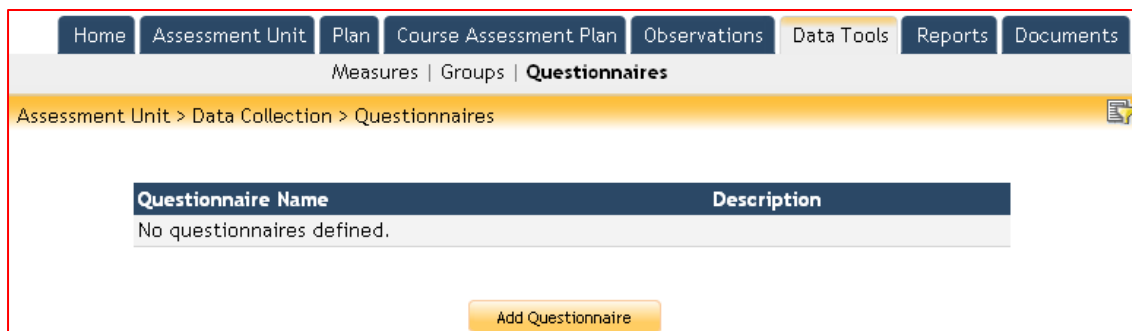
### Note to TracDat Administrators

- The **Data Tools** feature may be toggled on and off for any unit under: Institution > Configuration > Application Settings > Navigation Settings > Data Tools (**This also turns off the Questionnaires feature for that unit**)
- The **Questionnaires** feature may be toggled on and off for any unit under: Institution > Configuration > Application Settings > Navigation Settings > Data Tools > Questionnaires

**!! Units checked here will NOT see the Data Tools and/or Questionnaires!!**

## Navigation – Getting There

The Questionnaires feature may be accessed by clicking the Data Tools tab from the top navigation menu. This will then bring up the sub-tabs of Measures, Groups, and if left available – Questionnaires. If you do not see the Data Tools tab and/or Questionnaires sub-tab, and require this functionality, please contact your TracDat Administrator.





## Starting Off – Where to Create the Questionnaire

The Questionnaire feature may be used and managed from many different Units (both Assessment and Reporting Units) within TracDat. Deciding on where to create your Questionnaire usually depends on who will be managing it and the associated data.

If someone has an Admin or User role for the Unit where the Questionnaire is created, they will have access to create, edit, and delete the Questionnaire as well as get the hyperlink used to distribute the Questionnaire.

In short, create the Questionnaire at the level where it will be managed, not at the level where the data may be entered, as the data entry is gathered by distributing a link to the Questionnaire to responders by email.

## Creating a Questionnaire

### 1. Click on ‘Add Questionnaire’

When first using the Questionnaire builder, you will not have any Questionnaires saved, so there will not be any defined. Select ‘Add Questionnaire’ to develop a new one.

Questionnaire Name	Description
No questionnaires defined.	
<a href="#">Add Questionnaire</a>	

### 2. Define your Questionnaire

Name:	*	<input type="text"/>				
Description:		<input type="text"/>				
Instructions:		<input type="text"/>				
Questions:						
<table border="1"><thead><tr><th>Question</th><th>Value Type</th></tr></thead><tbody><tr><td colspan="2">No questions defined.</td></tr></tbody></table>			Question	Value Type	No questions defined.	
Question	Value Type					
No questions defined.						
<a href="#">Save Changes</a> <a href="#">Discard Changes</a> <a href="#">Add Category</a> <a href="#">Add Question</a> <a href="#">Return</a>						



**Name:** This is the name of the questionnaire – all questionnaires must have at least a name.

**Description:** This is a description of the questionnaire that will be available for those managing the questionnaire to categorize the questionnaire, date it, etc., to tell this one apart from others that are created.

**Instructions:** The instructions will appear on the first page for those completing the questionnaire. (optional).

**Questions:** Questions will be defined in the next step.

### 3. Define your Questions

When first creating your questionnaire, you will not have any questions defined. There are five types of fields available for use in your questionnaire:

**Numeric Input** – Respondents can enter a numeric value in response to the question, under conditions that you define.

Question: \* Sample Numeric Question  
Answer Type: Numeric Input  
Minimum Value: 0 Maximum Value: 5 Decimal Places: 1

**Text Input** – Respondents can enter text in response to the question. They will be presented with a single line (short answer).

Question: \* Sample Text Question  
Answer Type: Text Input

**Long Text Input** – Respondents can enter text in response to the question. They will be presented with a large box (long answer).

Question: \* Sample Long Text Question  
Answer Type: Long Text Input

**Select from List (Text)** – Respondents can choose a pre-defined text answer to the question using either a drop-down menu or radio buttons.

Question: \* Sample List (Text) Question  
Answer Type: Select From List (Text)  
Display Using: Dropdown  
[Add Item](#)

Item	
Yes	<a href="#">edit</a>   <a href="#">delete</a>
No	<a href="#">edit</a>   <a href="#">delete</a>
Maybe	<a href="#">edit</a>   <a href="#">delete</a>

**Select from List (Numeric)** – Respondents can choose a pre-defined text answer with a corresponding numeric value to the question using either a drop-down menu or radio buttons.

Question: \* Sample List (Numeric with Labels) Question

Answer Type: Select From List (Numeric) ▾

Display Using: **Radio Buttons** ▾

[Add Item](#)

Item Label	Item Value	
Strongly Agree	5	<a href="#">edit</a>   <a href="#">delete</a>
Agree	4	<a href="#">edit</a>   <a href="#">delete</a>
No Opinion	3	<a href="#">edit</a>   <a href="#">delete</a>
Disagree	2	<a href="#">edit</a>   <a href="#">delete</a>
Stongly Disagree	1	<a href="#">edit</a>   <a href="#">delete</a>

Question: \* Sample List (Numeric with Labels) Question

Answer Type: Select From List (Numeric) ▾

Display Using: **Dropdown** ▾

[Add Item](#)

Item Label	Item Value	
Strongly Agree	5	<a href="#">edit</a>   <a href="#">delete</a>
Agree	4	<a href="#">edit</a>   <a href="#">delete</a>
No Opinion	3	<a href="#">edit</a>   <a href="#">delete</a>
Disagree	2	<a href="#">edit</a>   <a href="#">delete</a>
Stongly Disagree	1	<a href="#">edit</a>   <a href="#">delete</a>

#### 4. Defining Categories

Categories are descriptive tags that can be used to identify sets of questions. They can be used as headers to categorize those questions in complex or large questionnaires. Building on what has been illustrated thus far, here is the completed questionnaire below.

You can use the arrow buttons to move the Categories and Questions up or down.

Name: \* Sample Questionnaire

Description: First Draft

Instructions: Please answer all the questions in the questionnaire. When you are finished, please click 'Save'.

Questions:

Question	Value Type	
<b>Sample Category 1</b>		<a href="#">edit</a>   <a href="#">delete</a>
Sample Numeric Question	Numeric	<a href="#">edit</a>   <a href="#">delete</a>
Sample Text Question	Text	<a href="#">edit</a>   <a href="#">delete</a>
Sample Long Text Question		<a href="#">edit</a>   <a href="#">delete</a>
<b>Sample Category 2</b>		<a href="#">edit</a>   <a href="#">delete</a>
Sample List (Numeric with Labels) Question	Select From List (Numeric)	<a href="#">edit</a>   <a href="#">delete</a>
Sample List (Text) Question	Select From List (Text)	<a href="#">edit</a>   <a href="#">delete</a>

## Publishing the Questionnaire

After the questionnaire is created and the questions and categories defined, it is ready to be published. The publisher allows the creator to create one or more published groups that will be responding to the questionnaire. Each group can have certain pieces of information in addition to the questions on the questionnaire be collected – these may vary by group. For example, for one group, you may want to collect each respondent’s first and last name, while another group of respondents may remain anonymous.

The publisher works by creating a group-specific link to the questionnaire, which can then be distributed through your regular e-mail program or placed on a website for potential respondents to access. To begin, select the publisher link next to the appropriate questionnaire under the Questionnaire sub-tab.

Questionnaire Name	Description	
Sample Questionnaire	First Draft	<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">publisher</a>   <a href="#">export data</a>

## Adding a New Published Group

When first using the questionnaire builder, you will not have any published groups saved, so there will not be any groups defined.

Name: \*

Description:

Published Groups:

Name	End Date
No published groups defined.	

### 1. Click on ‘Add Published Group’ – Defining your Group

Name: \*

Collect individual identifier (i.e. student id)  
 Identifier Label:

Collect last name

Collect first name

Collect e-mail address

End Date: \*

**Name:** This is the name of the group. All groups must have a name.

**Collect Individual Identifier:** If checked, the respondent will be asked to provide a piece of information defined as the identifier label (see Identifier Label) before the questions of the questionnaire are presented.

**Identifier Label:** This is the piece of information that the respondent will be asked to provide. This and the other group questions appear as short text fields for the respondent to complete.

**Collect Last Name:** If checked, the respondent will be asked for his or her last name before the questions of the questionnaire are presented.

**Collect First Name:** If checked, the respondent will be asked for his or her first name before the questions of the questionnaire are presented.

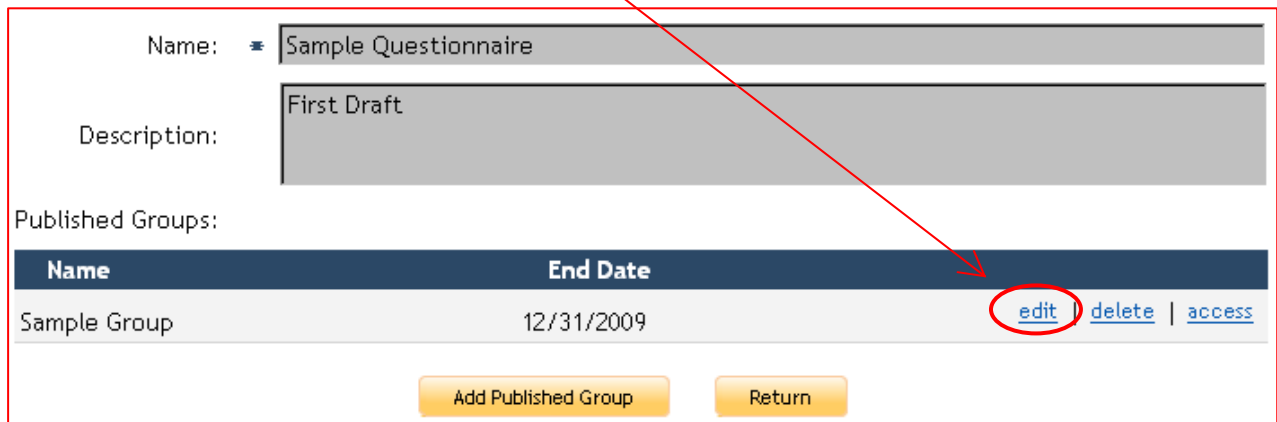
**Collect E-mail Address:** If checked, the respondent will be asked for his or her e-mail address before the questions of the questionnaire are presented.

**End Date:** This date is the day when the access to the questionnaire for this group expires. All groups must have an end date for the questionnaire.

After this section is completed, please click **Save Changes** to save the published group.

## 2. Sending the Questionnaire to Respondents

When the questionnaire is ready to be sent to distributed to a group, click the **publisher** link next to the appropriate questionnaire and then **edit** the published group you wish to distribute the questionnaire to.



Name	End Date	
Sample Group	12/31/2009	<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">access</a>

This will bring up the Group edit screen that you had completed before, but with one new addition. There will now be an **Access URL** that you can then distribute to your group however you wish.



Name:

Collect individual identifier (i.e. student id)  
Identifier Label:

Collect last name

Collect first name

Collect e-mail address

End Date:

Access URL:

This Access URL can be copied and pasted into a web browser (Internet Explore and Firefox are recommended for PC users, and Safari and Firefox are recommended for Mac users). Distribution of the Access URL is currently accomplished separately from TracDat.

## Completing the Questionnaire without the Access URL

A respondent may complete the questionnaire without using the Access URL if they have Admin or User access to the unit in TracDat where the questionnaire has been created. The respondent would need to go to the Data Tools tab, Questionnaires sub-tab, and then edit the appropriate questionnaire. The respondent can then click on the access link to fill out the questionnaire. This feature is also useful for checking the questionnaire prior to distribution.

Name:

Description:

Published Groups:

Name	End Date	
Sample Group	12/31/2009	<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">access</a>

Building on what has been illustrated in this guide, below is an example of what a respondent would see when completing the questionnaire developed above.

### Demographic/Respondent Data (first) page:

Questionnaire

Instructions:  
Please provide the requested data prior to continuing to the questionnaire.

Graduation Year: \*

Last Name: \*

First Name: \*

E-mail: \*

### Questionnaire (second) page:

Questionnaire

Instructions:  
Please answer all the questions in the questionnaire. When you are finished, please click 'Save'.

**Sample Category 1**

Sample Numeric Question

Sample Text Question

Sample Long Text Question

**Sample Category 2**

Sample List (Numeric with Labels) Question

- Strongly Agree
- Agree
- No Opinion
- Disagree
- Stongly Disagree

Sample List (Text) Question

**Radio Button Option**

**Drop-Down Menu Option**





## Exporting Data

Questionnaire Name	Description	
Sample Questionnaire	First Draft	<a href="#">edit</a>   <a href="#">delete</a>   <a href="#">publisher</a>   <a href="#">export data</a>

Data for each questionnaire may be exported into Excel via the **export data** link on the Questionnaires sub-tab.

Questionnaire:

[Generate Export](#)

Clicking the **Generate Export** button will export data from all published groups associated to the questionnaire. To only return selected groups, please use Excel to filter your results.

For detailed assistance on Excel, you may want to visit <http://office.microsoft.com/en-us/excel>.