SED Monitoring and Vendor Performance System

Instruction Manual

Version 2.6.9.2

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Instruction Manual - Overall

This manual describes the various features of SED Monitoring and how to use them. Topics include creating and using surveys for internal users, modifying the workflow for survey submission and review, the survey submission process for assigned entities, the review process for survey reviewers, and the calculations feature.

General Information & Survey Creation

Overview

This section describes the various aspects and features involved in the creation and management of surveys in SED Monitoring.

Access to the System - NYSED

Requests for NYSED Staff or outside Reviewers to have access to the SED Monitoring system should be sent to ITS-SEDMON@nysed.gov. Users will need to have an account created in the SED Delegated Account System (SEDDAS) if they do not already have one.

Once a new user has been given a SEDDAS account with access to SED Monitoring, users with the Assign Privileges role may then grant the user access to particular Owners or Surveys using the Survey Privileges Page. Users can be given as many or as few privileges as needed to perform their duties.

Assigning Privileges

Assigning privileges is done on the Survey Privileges page, and privileges can be tied to either the Owner or Survey level by checking the appropriate box. If the Owner checkbox is checked, the privilege will be given to that user for all Surveys under that Owner. If only the Survey checkbox is checked, the privilege will only apply to that particular Survey.

Privileges

Assign Privileges

Allows the user to grant privileges to other users for any Owner/Survey they have this for.

Owner Administration (Owner level only)

Allows the user access to the Owner Administration module where they can change the Owner Email Address, Welcome Message, Manage the FAQ, and view scheduled emails.

Survey - Email

Allows the user to access the Email Log and Custom Email tab.

Survey - Entity Assign

Allows the user to manage which entities are assigned to fill out the Survey.

Survey - Update

Allows the user to make changes to the Survey as well as change its overall status (Publish/Close).

Survey - View

Allows the user to view the Survey but not its results (done in a separate privilege) and is required for all other privileges.

Survey Admin (Owner level only)

Allows the user the ability to create new Surveys or Delete existing ones.

Survey Results - Add Comments

Allows the user to make comments on the Entity Results.

Survey Results - Unapprove

Allows the user to unapprove approved Entity Results.

Survey Results - View

Allows the user to view the Results submitted by the Entities and is required for other Survey Results privileges.

Workflow Administration

Authorizes the user to maintain workflow groups and reassign reviews

Access to the System - Entity

Access to the system to fill out a survey is linked to Entities that are in either SEDREF or the OSC Vendor Table. Once an Entity has been assigned a survey, the Superintendent/CEO will be given access to it as the Submit/Certify user, and will also have the ability to grant other users access to it using SEDDAS. Access granted to the other Entity Users is done on an Owner-by-Owner basis and can be either Data View or Data Entry.

Depending on the purpose of a survey, individual users can also be made Entities instead of an institution or vendor. In that case, the user is assigned by name to the survey, and they are treated as having the Submit/Certify role for that survey.

Roles

Submit/Certify

Given automatically to the Superintendent, Principal, CEO, or Vendor contact. These users are the only ones who can submit a Survey as well as grant access to other users.

For surveys that are assigned to individual users rather than institutions, the assigned user cannot delegate access to that survey to other users.

Data Access

The Data Access role covers all other Entity users and has two sub-roles that can be granted for individual Owners

Data Entry

These users are able to fill out a Survey but cannot submit*. These users will also be CC'ed on all emails sent from the system about Owners they have this role for.

Data View

These users are able to view but not fill out Surveys under the owner they have this role for.

*: Note that for certain surveys, the workflow may be configured to allow data entry users to submit at certain stages. See the Workflow Administration section of this manual for more information.

Checking Access

To check what rights an Entity user has and what Entity they are tied to, users with the Owner Administration privilege can select the "Check Institution Access" option from the Help menu in the upper right of the screen. This will cause a popup to appear where you can look up users by any combination of Entity Name, First Name, or Last Name. You can also enter the first several letters of a name if you aren't sure of the full name.

Check Institution Access

Institution Name 1 | Albany City SD

5 **Search**

First Name 2

Last Name 3

4

No Access: This user has access to the SED Monitoring but not MVPs.
Data View: These users can view but not change their institutions surveys.
Data Entry: These user can make changes their institutions surveys.
Submit/Certify: These users can submit surveys.

Institution - Title 7	Name (User Name) 8	Access 9
Albany City SD - SUPERINTENDENT	Marguerite Vanden Wyngaard (marguerite.vandenwyngaard)	SUBMIT CERTIFY
ALBANY CITY SD - OTHER	Nicole Lindeman (nicole.lindeman)	No Access
ALBANY CITY SD - OTHER	Eileen Leffler (EILEEN.LEFFLER2)	DATA ENTRY

6 Close

1. The name of the Institution you want to look up users for
2. The first name of a user to look up
3. The last name of a user to look up
4. A description of the types of access an Institution user can have
5. The button to execute the search
6. Closes the Check Institution Access windows
7. This column contains the name of the Institution that the user has access for and what their title is at that Institution
8. This column contains the Name of the user and their user name they use to log into the system
9. This column contains the level of access this user has for this Owner.

Survey Administration Page

The Survey Administration page will usually be the first page NYSED users see once they log into the system, unless they have access to multiple owners in which case they will go to the Owner Administration page instead. From the Survey Administration page, users can access any survey under the currently selected Owner, as long as they have been granted view privileges to those surveys or the Owner. Depending on their privileges, they may also add additional surveys, view survey results, or delete a survey.

1. Name of the Owner currently being viewed
2. Link to the Reviewer Dashboard
3. Main Menu dropdown
    1. Owner Admin - View the Owner Administration Page
    2. Survey Admin - View the Survey Admin Page (current page)
    3. Status Report - View the Status Report of Surveys for the current owner
4. Help Dropdown
    1. FAQ - View the Frequently Asked Questions page
    2. Instruction Manual - A link to download this document
    3. Check Institution Access - Allows the user to check what access an Institution User has
    4. Contact Us - View the Contact Us page
5. User Information - The name of the user and the type of user access
    1. Logout
6. Owner Details - View the Owner Details page for the current Owner (this option is only available to users with the Owner Admin privilege)
7. Add Survey - Used to create a new Survey
8. Name of the Survey - Clicking the name of a survey will take the user to the survey cycles page, which includes a menu of other options for the selected survey

Owner Details

This page is only available to users that have been granted the Owner Administration privilege.

1. The menu to the left shows all of the Owner-level settings that are available. Some of these options are limited to users with certain privileges.
    1. The NYSED Admin option is only available to certain administrative users in the IT department.
    2. The Email Scheduling option is described in more detail on the Emails page of this manual.
    3. The Workflow option is described in more detail in the Workflow section of this manual.
2. The name of the Owner as it appears in the application. This cannot be changed except by ITS staff.
3. The owner email address. Any emails sent from the system will use this email address in the From field of the email, and any emails to NYSED from the system will also go to this address.
4. The welcome message is the first thing that appears at the top of the Dashboard screen for Entity users and for reviewers. This message is typically a good place to offer important guidance for users and notify them how to contact the appropriate office if they have questions or concerns.
5. The theme drop-down changes the background image used throughout the system for this Owner.

Rubric Admin

Rubrics offer an additional tool to reviewers to assess a Survey submission. Rubrics must be set up through the Rubric Admin screen before they can be used in surveys. Once set up, Rubrics can be added to Survey Questions while building or editing the survey.

	MVPS
Owner Details	
Rubric Admin	→
NYSED Admin	
FAQ	
Email Scheduling	
Workflow	

Rubric Listing   Add New Rubric

Name	Description	Active Date	Inactive Date	
1-5 Rating	Allows for rating a question on a 1 to 5 scale.	11/23/2015		View Rubric
Test	Test	1/4/2016		View Rubric

2 items found, displaying all items.

Frequently Asked Questions (Owner)

A Frequently Asked Questions (FAQ) page can be set up to provide more detailed guidance for users unfamiliar with the system, the Owner, or a particular Survey. Users will be able to read an FAQ page for the selected owner by choosing FAQ from the Help menu. The contents of the FAQ page can also be seen by clicking the Help button at the bottom of the screen and using the search bar to find a topic.

Each FAQ (a question and answer pair) is part of an FAQ Group. FAQ Groups are added with the Add FAQ Group for Owner button at the bottom of the page. Existing groups can be moved up or down, and FAQs are added to the groups from the FAQ Group Options menus appearing next to each group heading.

The example below has several FAQ groups with many questions created. Some general FAQ Groups are created by ITS staff and will appear at the top of the FAQ page for every Owner in the system.

Testing Ground - Frequently Asked Questions

≡ Testing Ground

Owner Details

Rubric Admin

NYSED Admin

FAQ →

Email Scheduling

Workflow

☑ Frequently Asked Questions

Search [Search...]

If you cannot find an answer to your question or need further clarification please contact:

- For other all other Testing Ground Surveys - michael.wainwright@nysed.gov

SED Monitoring

System Access And Roles

- Who can fill out surveys?
- Who should I contact if I can't remember my user name or password?
- What are Roles in SED Monitoring, and which Role do I have?
- Who should I contact if I have been given the wrong Role?

Viewing Assigned Surveys

- Why can't I find the survey I'm trying to fill out?
- I am a principal/school superintendent and have the SUBMIT/CERTIFY Role. Why can't I see a survey I was assigned to?
- I was assigned a survey that is not applicable to my institution. How do I correct this?

Filling Out A Survey

- Why can't I submit a survey?
- I accidentally created another survey that is not necessary. How do I delete it?

Other Questions

- Who should I contact if I have more questions about a survey?
- Who should I contact if I have questions or issues relating to SED Monitoring in general?
- Who should I contact to request a demo of SED Monitoring and its features?

SED Monitoring

System Access And Roles [FAQ Group Options ▾] [↓Move Down]

Who can fill out surveys? [FAQ Options ▾] [↓Move Down]

When a survey is assigned to an institution, the institution's CEO is given access to SED Monitoring through the NYSED Delegated Account System (SEDDAS). The CEO can fill out and submit any survey that has been assigned to that institution. If additional users should be given access to fill out or view surveys, an institution's Entitlement Administrator can entitle additional users to SED Monitoring. For additional details on creating and entitling user accounts, please read the SEDDAS User Guide or the Entitling Users Mini-Guide. If you still have questions about creating and entitling accounts, please email the SEDDAS help desk at SEDDAS@nysed.gov.

Back to top

Who should I contact if I can't remember my user name or password? [FAQ Options ▾] [↑Move Up] [↓Move Down]

Users can reset their own passwords if they have forgotten or wish to change them, or if their account becomes locked. Please read the SEDDAS Password Reset Guide for more information on password management. If you can't remember your user name, please contact the SEDDAS Help Desk at SEDDAS@nysed.gov.

Back to top

What are Roles in SED Monitoring, and which Role do I have? [FAQ Options ▾] [↑Move Up] [↓Move Down]

You can see your Role within SED Monitoring written next to your name, on the top right of your screen. The SUBMIT/CERTIFY role allows users to certify and submit the surveys they are assigned to. DATA ENTRY means the user can fill out surveys assigned to their institution, but only the CEO can submit it. DATA VIEW means the user can view surveys assigned to their institution but not fill them out. Additional roles exist for NYSED users who create and maintain surveys.

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Status Report

Under the Main Menu, there is an option to view the Status Report page. This report is used to get a quick overview of how many Entities have completed surveys for the current Owner, or how close they are to finishing them.

The Status Report shows all available surveys under the current Owner, the current Status of the surveys for each Entity, and their Completion Status. If a survey has a status of Not Submitted, the report will indicate whether the Entity has not started the survey, or they have started but not yet submitted. The Completion Status column will further indicate how many pages of the survey the Entity has completed.

The report is initially sorted by Entity Name, and may be resorted by any other column by clicking on the column heading. The Search field can be used to narrow down the report results or find a specific Entity or Survey in the report.

NOTE: Entities typically cannot see the same detailed survey status that reviewers can. When the survey's workflow is being configured, different display names can be chosen to control what the entity sees at each stage of the workflow. By default, when a survey is viewed by an Entity, its status is always shown as "Not Submitted", "Submitted", or "Approved".

Status Report			To Bottom of Page
			Search:
Survey Name	**Entity Name**	**Status**	**Completion Status**
Expanded Pre-K Test (Annually, 2015)	AABR, INC.	Not Submitted - Not Started	0 of 1 (0%) Pages Completed
OEL Test (Annually, 2015)	AABR, INC.	Not Submitted - Not Started	0 of 1 (0%) Pages Completed
Expanded Pre-K Test (Annually, 2015)	ALBION CSD	Approved	1 of 1 (100%) Pages Completed
OEL Test (Annually, 2015) - Sample	ALBION CSD	Boces Review	1 of 1 (100%) Pages Completed
OEL Test (Rollover test)	BUFFALO CITY SD	Not Submitted - Not Started	0 of 2 (0%) Pages Completed
Expanded Pre-K Test (Annually, 2015)	DANSVILLE CSD	Approved	1 of 1 (100%) Pages Completed
OEL Test (Rollover test)	DOVER UFSD	Not Submitted - Not Started	0 of 2 (0%) Pages Completed
Compare Test (Test)	LANCASTER CSD	Not Submitted - Started	1 of 1 (100%) Pages Completed
OEL Test (Rollover test)	LANCASTER CSD	Not Submitted - Started	0 of 2 (0%) Pages Completed
OEL Test (Rollover test)	LANCASTER CSD	Not Submitted - Not Started	0 of 2 (0%) Pages Completed
OEL Test (animal survey) - 00000002	LANCASTER CSD	Not Submitted - Started	1 of 2 (50%) Pages Completed
OEL Test (animal survey) - 00000001	LANCASTER CSD	Not Submitted - Started	1 of 2 (50%) Pages Completed
OEL Test (Rollover test)	NISKAYUNA CSD	Not Submitted - Not Started	0 of 2 (0%) Pages Completed
OEL Test (animal survey)	NISKAYUNA CSD	Boces Review	2 of 2 (100%) Pages Completed

Export options: Excel

Survey Details

The Survey Details page holds the basic Survey information that generally will not change over its lifetime. The information on this page is as follows:

New Survey

Contact Phone **9**

The phone number to be displayed as who to contact in regards to questions about this survey.

Start Date **10**

Excludes any cycles that take place before this date

11

Workflow **12**	Name	Description
○	Default Workflow	The default workflow of Entity Submits to NYSED who can Unsubmit or Approve.

Copy Template

Copy From **13**

Copy Survey Layout and Questions from this Survey

Copy To **14**

Template Type **15**   ● Copy just the template (Sections and Pages)
                      ○ Copy the entire Cycle (Questions included)

16 [Save]   [Save & Continue] **17**

Existing Survey

NYSED.gov   Testing Ground   🐾 Dashboard   ⚓ Main Menu ▾   ⓘ Help ▾   👤 Daniel M. (NYSED ADMIN) ▾

Demo Survey - Survey Details

☰ Demo Survey 1

| Survey Details → |
| Survey Privileges |
| Workflow |
| Survey Settings |
| Supporting Documents |
| Cycles |
| Entity Assignments |
| Results |
| Emails |
| FAQs |

✎ Survey Details   **2** [Delete Survey]

Name **3**   Demo Survey

Enter the name of this survey

Description **4**

Description

Words: 1

Enter a brief description of the survey

Instructions **5**

Words: 0

This will appear on the left side of every page of the survey

1. The Survey Navigation Panel. A full list of survey options will be available after the new survey is saved for the first time.
2. Delete Survey - Deletes this Survey from the system. You will be asked to confirm that you want to delete this survey.
   1. If a survey is accidentally deleted, IT staff can restore it. If this occurs, please send an email to ITS-SEDMON@nysed.gov with the name of the survey and what Owner it is under to have it restored.
3. Name - The name of the survey as it will be displayed to the user. Required.
4. Description - An internally-only viewable description of the survey where you can describe what is being collected or why. Required.
5. Instructions - Instructions that will appear on every page of the survey in a box on the left side of the screen. Useful for information such as who to contact for questions.
6. Certification Text - The text entered here will be displayed on the Submit/Certify page that will be seen by Submit/Certify users when they submit their survey and must be agreed to.
7. CC Email - A comma delimited list of email addresses that will be CC'ed on all emails regarding this survey.
8. Contact Email - The contact email address displayed to users on the FAQ page or in the Help button window.
9. Contact Phone - The contact phone number displayed to users on the FAQ page or in the Help button window.
10. Start Date - Used to limit the time period of the cycles that can be selected. For instance of you enter 1/1/2015 no cycles from before that date will show up when creating a new one.
11. This section is only visible when creating a new Survey. After a Survey is created you can do a copy from the Cycles Tab.
12. Workflow - The workflow to be used in this survey is selected here. Required.
13. Copy From - The Survey you wish to copy a Cycle Survey from. (Copying is optional)
14. Copy To - The Cycle Type you wish to create as a new Cycle of the current Survey. (Copying is optional)
15. Template Type - Determines what information is copied.
    1. Copy just the Template (Sections and Pages) - Copies just the basic layout of Section and Page names
    2. Copy the entire Cycle (Questions Included) - Copies the basic layout as well as the questions on each page. Does NOT copy answers. (There is a separate setting to allow previous answers to be copied to the new cycle. See Survey Settings for more details)
16. Save - Saves the survey information.
17. Save & Continue - Saves the survey information and takes you to the Cycles tab.

Survey Privileges

The Survey Privileges page is where users with the Assign Privileges privilege can Assign privileges to other users at either the Owner or Survey level. If done at the Owner level the privilege will apply to all Surveys under that owner, and if granted at the Survey level will apply only to that Survey.

1. Survey Navigation
2. Add User - Gives a new user access to this survey.
3. Staff Name - The name of the Staff Member. Click on the name to edit the user's privileges.
4. Privileges - The Privileges the Staff Member has
5. Groups - The Review Groups the Staff Member is a part of
6. Owner Level Privileges - Privileges with the "(via survey owner)" tag indicate the user has this access to all Surveys under this Owner
7. Survey Level Privileges - Privileges without the "(via survey owner)" tag indicate the user has this access to just this Survey but not necessarily other Surveys.

Staff Permissions

Survey: 1 Demo Survey

Staff Member: 2

Type the name or e-mail of a staff member to search for, and then select that person from the list.

3	4	5	6
Name	Owner	Survey	Description
Assign Privileges 7	☐	☐	Authorizes user to delegate/modify survey permissions for other users.
Owner Administration 8	☐		Allows access to Owner Admin
Survey - Email 9	☐	☐	Allows the user to send emails to the entities
Survey - Entity Assign 10	☐	☐	Allows the user to assign entities
Survey - Update 11	☐	☐	Authorizes user to update surveys.
Survey - View 12	☐	☐	Authorizes permission to view survey(s). This should always be selected.
Survey Admin 13	☐		Allows the user to assign entities

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Survey Results - Add Comments **14**	☐	☐	Allows user to add comments to survey results.
Survey Results - Approve **15**	☐	☐	Allows user to approve survey results.
Survey Results - Unapprove **16**	☐	☐	Allows user to unapprove survey results.
Survey Results - View **17**	☐	☐	Allows user to view survey results submitted by entities.
Workflow Administration **18**	☐	☐	Authorizes the user to maintain workflow groups and reassign reviews

19	Group **20**	Description **21**
☐	Reviewers	The Reviewers who will be handling the review process.

22 Close   **23** Save   **24** Save and Close

1. Survey - The name of the Survey that privileges are being assigned to
2. Staff Member - The name of the Staff Member being given privileges
   - Add - When adding a new user this will be an autocompleting drop down
   - Editing - When editing an existing users privileges this will not be changeable
3. Name - The name of the privilege
4. Owner - Indicates the user will be given this privilege to ALL Surveys under the current Owner
5. Survey - Indicates the user will be given this privilege to JUST this Survey
6. Description - A description of what the privilege grants access to
7. Assign Privileges - Users that are given this access can access the Privileges Tab and add or change a user's access to either just this Survey or for the all Surveys under the Owner depending on if they have this privilege under Owner or Survey.
8. Owner Administration - Users with this privilege can access to the Owner Administration Menu (covered later) where the welcome message, background theme, FAQ, and Owner email address are maintained. Only available at the Owner level.
9. Survey - Email - Users with this privilege can view the email log as well as use the systems manual email process (covered later).
   - Note: Requires Survey - View
10. Survey - Entity Assign - Users with this privilege can manage entity assignments to determine what entities should fill out a given Cycle Survey.
    - Note: Requires Survey - View
11. Survey - Update - Users with this privilege can make changes to the Survey.
    - Note: Requires Survey - View
12. Survey - View - Users with this privilege can view the layout of the survey (survey results are covered by a separate privilege).
    - Note: Most other privileges require this to also be selected.
13. Survey Admin - Users with this privilege can Create and Delete surveys. Only available at the Owner level.
14. Survey Results - Add Comments - Users with this privilege can create comments in the comment box.
    - Note: Requires Survey - View & Survey Results - View
15. Survey Results - Approve - No longer used
16. Survey Results - Unapprove - Users with this privilege can Unapprove surveys.
    - Note: Requires Survey - View & Survey Results - View
17. Survey Results - View -Allows the user to view all the surveys responses filled out by entities.
    - Note: Requires Survey - View
18. Workflow Administration - Users with this privilege can assign users to Review Groups and Reassign Surveys to different Reviewers.
19. Used to select which Review Group a user is part of (Only shows up for Workflow Admins)
20. Group - The name of the Review Group (Only shows up for Workflow Admins)
21. Description - A description of the Review Group (Only shows up for Workflow Admins)
22. Close - Closes the window without saving
23. Save - Saves the privilege changes without closing the window
24. Save and Close - Saves the privilege changes and closes the window

25. Allows for searching SEDDAS for users that cannot be found using the regular Staff Member search. This can be used to find NYSED Staff that have not yet been added (this can take up to 2 weeks for new staff), or outside users you want to give access to the system as a reviewer or survey admin.

OID Staff Search

You can search for NYSED Staff/Interns not found in the Add User button. If found select them and hit save. If not please contact ITSSEDMON@nysed.gov

Institution Name [NYS DEPT OF] 1   4   Search

First Name [   ] 2

Last Name [   ] 3

                                    8   9
                                  Close   Save

OID Staff Search

You can search for NYSED Staff/Interns not found in the Add User button. If found select them and hit save. If not please contact ITSSEDMON@nysed.gov

Institution Name [   ] 1   4 Search

First Name [raymond] 2

Last Name [   ] 3

	Institution 5	User Name 6	Email 7
○	ALBANY CITY SD - SUPERINTENDENT	Raymond Colucciello (raymond.colucciello)	
○	RIVERHEAD CHARTER SCHOOL - SUPERINTENDENT	Raymond Ankrum (raymond.ankrum)	

8   9

Close   Save

1. Institution Name - The name of the institution you want to look up the user at. Defaults to NYSED. (Optional)
2. First Name - The first name of the user you want to look up. (Optional)
3. Last Name - The last name of the user you want to look up. (Optional)
4. Search - Searches the portal for any users matching the search criteria that have access to SED Monitoring
5. Institution - The institution the user belongs to
6. User Name - The user's name and login name
7. Email - The user's email address
8. Close - Closes the popup
9. Save - Selects the user and opens the Privileges popup for this user

Workflow

From the Survey menu, staff can view information about the Workflow for the survey. To modify or create a new Workflow, users must have the Workflow Admin privilege and go to the Owner Details page (see Workflow Administration section of this manual).

Details

This page shows the selected Workflow for the Survey and its description.

Diagram

This page displays the Workflow diagram for the Survey.

Groups

The Groups page shows all of the review groups that are part of the workflow, descriptions of groups, the stages to which they may be assigned, and the list of staff members in the review groups.

Each group has an Add NYSED Staff button to allow staff members to be added to that group. Staff can also be added to review groups from the Survey Privileges screen.

Survey Settings

The Survey Settings tab allows for overriding the default behavior of the system for this Survey, and are activated by checking the box next to them and then saving the page by clicking the Save button at the bottom. The following are the Settings that are currently available:

Email

Settings related to how email is handled

DISABLE_APPROVE_UNSUBMIT_EMAIL

By default, whenever a submitted survey is Approved or Unsubmitted an email will be sent to the Entity notifying them of this. By selecting this setting, these emails will no longer be sent.

RECEIPT_EMAIL

By selecting this the recipient will get an email confirming their successful submission.

SUBMIT_EMAIL

By selecting this the Survey Contacts will receive an email when an entity submits a survey.

UNSUBMIT_EMAIL_PREFER_DATA_ENTRY

If selected, unsubmit emails will go only to Data Entry users unless there are no Data Entry users in which case it will go to the Submit/Certify User.

Allow Unsubmit from Approved

Settings related to allowing unsubmitting straight from the Approved stage

VERSION_OFF_APPROVE_ENTITY

By default, once a Response is Approved the process is over unless you unapprove. By selecting this setting, the Submit/Certify User at the Entity will be able to create a new version of their Response, with answers already filled out, to do again. This can be useful if you want to be able to compare a resubmission with the last approved response.

VERSION_OFF_APPROVE_NYSED

By default, once a Response is Approved the process is over unless you unapprove. By selecting this setting, NYSED Staff will be able to create a new version of an Entity's Response, with answers already filled out, for them to fill out again. This can be useful if you want to be able to compare a resubmission with the last approved response.

Other Settings

All other settings

DEFAULT_REQUIRED

By default, a question added in the system is not required unless it is marked Required. By selecting this all future questions created for this survey will default to Required.

HIDE_AUTONUMBERING

By default, all questions will be automatically numbered, and numbering will reset back to 1 on every page. Sub-questions will also be auto numbered using letters. By selecting this setting, the auto numbers will no longer appear.

INTERNAL COMMENTS

By default, comments entered on the Survey Response page can be viewed by the Entity they are for. By selecting this setting, comments will no longer be viewable by Entity users. Comments should not be confused with the review notes entered during the review process.

ON_DEMAND

By default, an Entity can only fill out one copy of the Cycle Survey, though they can fill out that one copy multiple times if it is unsubmitted. By selecting this setting, Entity Submit/Certify Users are able to request additional copies of the survey to fill out concurrently. (Note: On Demand surveys cannot use the versioning feature to compare submissions.

ROLLOVER_ANSWERS

By selecting this, an Entity will be able to retain their survey answers from one cycle to the next. Survey questions that have been changed in the current cycle cannot be rolled over this way.

For recently added cycles, entity answers will be automatically copied from the previous cycle overnight. Older cycles may require the entity to use the 'roll over answers' button when filling out the survey.

SUBMIT_AFTER_DUE_DATE

By default, an Entity cannot submit after the Due Date of the Cycle Survey. By selecting this setting, the due date becomes a Soft Due Date and does not stop Entities from submitting. Note: you can also selectively grant extensions to individual Entities in the Results Tab without affecting the overall due date.

TURN_OFF_VERSIONING

By default, each Entity's survey submission retains multiple versions, a new version being created each time the survey is unsubmitted. The versions are used to compare answers from one submission to the next. By selecting this setting, the versioning feature will be disabled for this survey.

Supporting Documents

The Supporting Documents tab is where NYSED Users upload documents associated with the Survey. These documents can either be marked Public or Private. A Public document will appear to Entity users and allow them to download it while a Private document is internal only.

Test 3 - Supporting Documents

☰ Test 3
Survey Details
Survey Privileges
Workflow
Survey Settings
General Information
Supporting Documents ➔
Cycles
Entity Assignments
Results
Emails

Supporting Documents   1   [Add Document]

Document Name 2	File Name	Public	3	4	5	6
Important Document	Koala.jpg	true	View	Make Private	Update Name	Delete

One item found.

Test 3 - Supporting Documents

1. The Add Document button opens the Add New Document pane.
2. The table shows all existing Documents for the Survey. The Document Name is displayed throughout the system. The File Name is not shown elsewhere. The Public column indicates if the Document is Public (true) or Private (false). Public documents are visible to Entities, while Private documents are not.
3. The View button downloads the file to your computer for viewing.
4. The Make Private button changes the Public status of the Document from true to false (makes it private). This button is replaced with a Make Public button if the Document is already private. The Make Public button changes the Public status of the Document from false to true.
5. The Update Name button opens the Update Document pane where the Document Name can be changed. This pane looks very similar to the Add New Document pane, but does not have the file upload section (8).
6. The Delete button deletes the Document. Be careful with this; deleted Documents cannot be restored.
7. Document Name - Sets the visible name of the Document.
8. Click the Choose File button in the file upload section to navigate your computer and select the file to be uploaded to create this document.
9. The Public checkbox sets whether this Document is Public, and thus visible to Entities. Leaving the box unchecked creates a Private Document. The Public/Private status can still be changed after the new Document is created.
10. The Save and Save & Add Another buttons both save the new document to the database and reload the page to show the current list of Documents. If Save & Add Another was selected, the Add New Document pane remains open.

Cycles

The Cycles page lists all the Cycles for the current Survey. Each Cycle is a separate iteration of the survey with its own set of questions, due date, and Entity assignments. From this screen, cycles can be created or edited. The Options menu next to each Cycle offers more ways to interact with the Cycle.

1. The Cycle Listing shows each Cycle by type. Annual, Quarterly, and Monthly Cycles will list the year of the cycle in the Year column. Adhoc cycles will instead show the Adhoc Identifier in parentheses. The Status column will show whether the survey is active.
   1. "Not yet published" indicates the survey is not published, and therefore not available to be filled out.
   2. "Published on " followed by a date indicates that the survey was published on that date and is currently active.
   3. "Closed on " followed by a date indicates that the survey was closed on that date. Closed cycles can no longer be filled out and submitted, but previous submissions will still be visible in the Entity's outbox.
2. The Add Cycle button will open the Add New Cycle window to create a new cycle (See below).
3. The Survey Questions button opens the survey editor where the survey structure and questions for this cycle can be created and modified.
4. Change Cycle Info - Opens the Editing Cycle window (similar to the Add New Cycle window) where the Cycle Type, Adhoc Identifier, and overall Cycle Due Date can be changed.
5. Delete Cycle - Deletes this Cycle from the system. If this option is selected by mistake, contact ITSSEDMON to have the Cycle restored.
6. Publish Cycle - Publishes the Cycle so it may be viewed and filled out by Entities. If this survey has a publish email and the cycle has not been published before, the publish email will be sent by the system. Published Cycles can no longer be changed in the survey editor.
   - When the cycle is published, this option is replaced with Unpublish Cycle, which returns the Cycle to "Not yet published" status, hides any existing submissions, and allows the Cycle to be modified again in the survey editor. Entities that were assigned to the Cycle will not be able to work on their submissions while the Cycle is not published. NOTE: Entity answers that were entered prior to the cycle being unpublished are not lost. They will be visible again after the Cycle has been published again.
7. Assign Entities - Takes the user to the Entity Assignments page with this Cycle selected, where Entities can be assigned to fill out the Cycle. (See the Entity Assignments page of this manual)
8. Close Cycle - Closes the Cycle so it no longer appears in Entity or Reviewer inboxes. Submitted and approved submissions will still be visible in the Outbox of an Entity's dashboard.
9. Print - Creates a PDF of a blank copy of the Cycle. The PDF can be saved or printed.

Add New Cycle

The Add New Cycle button opens the following window.

Add New Cycle

Cycle Type [▾]

Copy Survey From [Ed Tech Test ▾]

Copy Survey Layout and Questions from this Survey

Copy Cycle Survey From [▾]

Copy the layout and questions from this Cycle

Due Date [   ]

If left blank it will use the default due date for this cycle.

[Close] [Save and Close]

After selecting Cycle Type, a second field will appear depending on the chosen Cycle Type. If Annually, Monthly, or Quarterly were selected, the Cycle dropdown will appear with a list of existing Cycles to choose from. (If there is not an appropriate Cycle for the time period the survey will be active, you may contact ITS to have new Cycles added)

If Adhoc is selected, the Adhoc Identifier text field appears. Instead of being tied to a specific time period, the text entered in this field will identify the cycle. This is a common choice for surveys which need to run continuously or cover a different span of time like school years or fiscal years.

The Copy Survey From and Copy Cycle Survey From dropdowns give the option to copy the survey structure and questions from an existing cycle. If Copy Cycle Survey From is left blank, a new blank Cycle will be created.
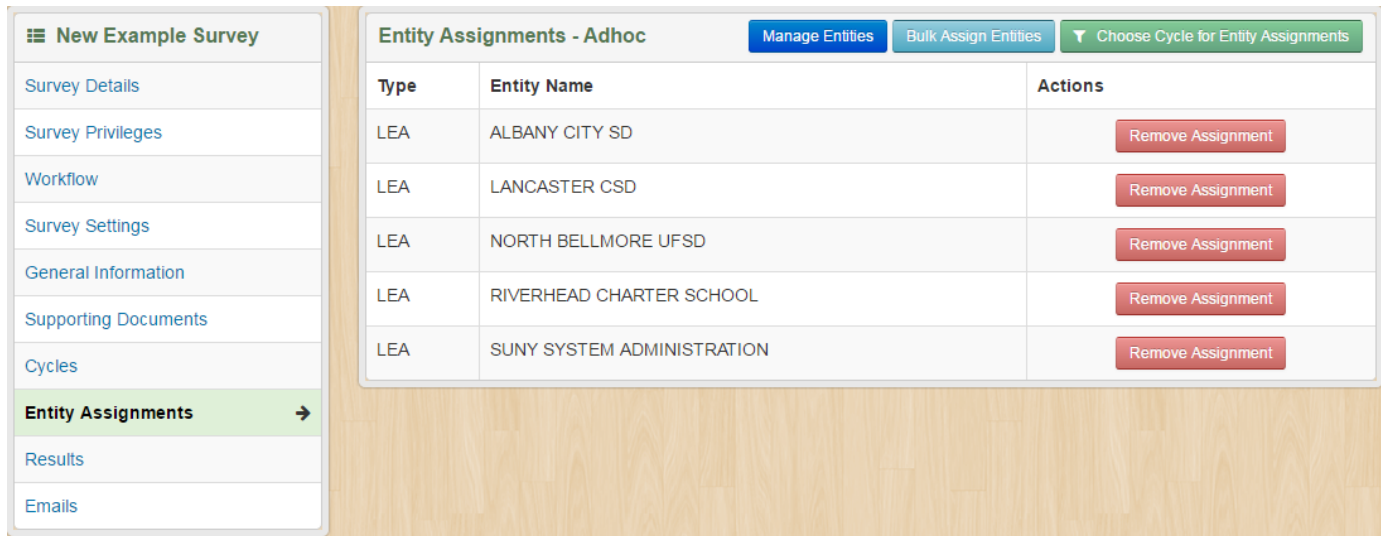
NOTE: If this survey allows answers to be rolled over from the previous Cycle (see the Survey Settings page of this manual), the Cycle selected in Copy Cycle Survey From also determines which Cycle answers will be imported from. If Copy Cycle Survey From is left blank, the option to roll over answers will not be enabled for this Cycle.

The Due Date field is used to set a due date for this Cycle. Most cycle types have a default due date; Adhoc cycles do not. If the Cycle Type is Adhoc and the Due Date field is left blank, this cycle will have no due date and Entities will be able to enter submissions until the Cycle is closed by staff.

Entity Assignments

The Entity Assignments page is where users with the Survey - Entity Assign privilege can set up what entities can fill out the survey and for what Cycles. It can either be accessed from the Cycles page by selecting the Options menu and then Assign Entities, or selecting the Entity Assignments page directly. In the latter case, you will need to first select "Choose Cycle for Entity Assignments" and filter for the desired cycle.

Once a cycle has been selected, you will see a list of all Entities that can currently fill out the survey as well as what type of entity they are (LEA /Vendor) and have the option to remove them with the Remove Assignment button (Note: this does not delete their responses, it only hides them). To add additional entities, select the "Manage Entities" button or "Bulk Assign Entities" button. To look at Entity assignments for a different cycle, click the "Choose Cycle for Entity Assignments" button.

≣ New Example Survey		**Entity Assignments - Adhoc**	[Manage Entities] [Bulk Assign Entities] [▼ Choose Cycle for Entity Assignments]
Survey Details	**Type**	**Entity Name**	**Actions**
Survey Privileges	LEA	ALBANY CITY SD	[Remove Assignment]
Workflow	LEA	LANCASTER CSD	[Remove Assignment]
Survey Settings	LEA	NORTH BELLMORE UFSD	[Remove Assignment]
General Information	LEA	RIVERHEAD CHARTER SCHOOL	[Remove Assignment]
Supporting Documents	LEA	SUNY SYSTEM ADMINISTRATION	[Remove Assignment]
Cycles			
Entity Assignments →			
Results			
Emails			

The "Manage Entities" button opens the following window, which allows the user to search available entities by name or type, and add them one at a time with the Add button.

Select any number of Entities to Assign to New Example Survey

Surveys may be assigned to individual users instead of institutions. If you are trying to assign this survey to users and they do not appear in the list, Click Here.

Show 10 ▾ entries   Search: [   ]

	Name	Type
Add	AABR, INC.	LEA
Add	ABBOTT UFSD	LEA
Add	ABILITIES FIRST, INC	LEA
Add	ADDISON CSD	LEA
Add	ADIRONDACK CSD	LEA
Add	ADULTS/CHILD LEARN DEVEL DISABILITIS	LEA
Add	AFTON CSD	LEA
Add	AICHHORN SCHOOL (THE)	LEA

Close

In addition to LEAs and Vendors, surveys may be assigned directly to individual users to fill out. This should only be done if the survey is meant to be submitted by users that are not directly associated with LEAs or Vendors, such as NYSED staff or certain outside users. Existing user entities can be selected from the list, and new ones can be added using the search form which appears at the top after clicking the "Click Here" link. Per the instructions on the screen, NYSED staff members can be found from the NYSED Staff search box. All other users with active SEDDAS accounts may be found using the Other User search box.

Select any number of Entities to Assign to New Example Survey

Surveys may be assigned to individual users instead of institutions. If you are trying to assign this survey to users and they do not appear in the list, Click Here.

To assign this survey to NYSED staff, use the NYSED Staff search bar, then click Add Entity.

NYSED Staff: [   ]

Type the name or e-mail of a staff member to search for, and then select that person from the list.

If the user to be assigned is not a NYSED employee or has not been added to the staff table yet, use the Other User search bar, then click Add Entity.

Other User: [   ]

Type the name or e-mail of a user to search for, and then select that person from the list.

Add User Entity

Close

If you have a large number of Entities to add, you can select the "Bulk Assign Entities" button. In the window that appears, input a list of the Entities' Institution Ids or (SEDDAS usernames for user entities), one per line, and click Save to add them to the survey. This may take a few seconds to complete for longer lists. If you experience problems with this function or some Entities fail to be assigned, send a message to ITS-SEDMON@nysed.gov for help.

Bulk add entities to New Example Survey

Paste or type in a list of SEDREF Institution Ids or SEDDAS usernames, one per line, that you want to assign to this Cycle and then select Save. You will then recieve a list telling you which were successfuly added and which were not found. Note: this can take several seconds.

Close   Save

Results

Users with the Survey Results View privilege may view Survey submissions on this page. Cycles that have not been published or were unpublished cannot be viewed until the cycle is published. The list is sorted by Entity Name by default, but can be sorted by any of the other columns by clicking the column heading.

1. The Filter Results button opens the Filter Results window, which can be used to change which survey results are being viewed. (See below)
2. Entity Name indicates the name of the Entity that filled out the submission. This is the name on SEDREF for Institutions, the name from the OSC Vendor tables for Vendors, or the first and last name for user Entities.
3. Cycle indicates the Cycle of the submission. For Adhoc Cycles, this will show the Adhoc Identifier.
4. Status indicates the current Status of the submission and the date it reached that Status.
5. Assigned To indicates who the submission is currently assigned to. When unsubmitted, it will be assigned to the Entity. When submitted, it will be assigned to a reviewer or reviewer group depending on the survey's workflow.
6. Due Date indicates the due date for the submission. This is normally the due date of the Cycle unless an extension has been granted. (See Grant Extension below)
7. Actions includes the View Survey button and Options menu. View Survey takes the user to the survey review page. Options opens the options menu for the submission, which includes the following choices.
8. Download Survey and Attachments - Downloads a ZIP file containing a PDF of the survey submission and any file attachments uploaded with the submission.
9. Grant Extension - Opens a window to change the due date for just this Entity. This is used if a due date extension is being given to a specific Entity or group of Entities but should not be given to all Entities assigned to the Cycle.
10. Change Assignments - Only available to users with the Workflow Admin privilege. This option can be used to reassign a submission, for example if a reviewer is unavailable to complete a review and it must be given to a different reviewer to complete.
11. Change Stage - Only available to users with the Workflow Admin privilege. This option can be used to move the submission to a different stage of the workflow and assign it to an appropriate user or group at that stage. This can create errors in the version history, and so should only be used when there is a problem with a submission that cannot be otherwise resolved.

The Filter Results window can be used to change which survey results are being viewed. The Status dropdown is set to Submitted by default, and can be changed to Unsubmitted or Approved. Unsubmitted results have not yet been submitted by the Entity, or may have been sent back to the Entity for corrections. Approved results have gone through the review process and passed to the final Approved stage. For surveys with more complex workflow, all stages in the review process after the Entity submits but before final approval are treated as Submitted.

The Cycle drop-down is set to Show All Open by default, and offers several choices.

- Show All Open shows any results matching the selected Status that are from an open cycle (one that has not been closed).
- Show All shows any results matching the selected Status.
- Each individual Cycle of the survey also appears in the Cycle drop-down. Selecting a specific cycle shows just results for that particular cycle matching the selected Status.

Emails

The SEDMonitoring system can be used to send both Automated and Manual emails, as well as keep a log of those that have been sent.

Email Log

The Email Log that is located in the Emails tab of each Survey (Note: You will need Survey Email privileges to view it). This log will contain all emails sent either Automatically or Manually via the system along with the date they have been sent.

The View Recipient button allows you to see what Entities and what users at the Entities were sent the email in question. From this page you may also view the email that was sent.

Automated Emails

Automated emails can be set up to be sent when certain conditions are met such as Approval, Unsubmission, and Publishing. It also allows for the setup of automated Reminder emails that will be sent to all users who have not submitted by a set period of days before or after the due date.

General Email Information

Who at the Entity will receive the emails?

All emails are sent to the Submit/Certify user as well as any Data Entry users that have been given access to your Owner.

What email address are emails sent from?

Emails will appear to come from the address you entered in Owner Administration so any replies will go to that email.

How will we know they are sent?

Depending on the number of Entities the email is sent to you will be notified differently.

One Recipient - The Email address entered in Owner Administration, along with those in Survey Details, will be BCC'ed and CC'ed respectively.

Multiple Recipients - A separate summary email will be sent listing all Entities that received the email to prevent spamming your inboxes.

Can I preview an email in the System?

Yes, any non-default email can be previewed by going to the Email Schedules tab in Owner Administration an clicking View Template.

Can an email be formatted?

No, the only formatting we can do is to have a URL be clickable.

Can I customize the email for a particular Entity?

Yes, we allow the use of certain values from the system to be used in the emails with those being:

- Survey Name – Name of the Survey
- Cycle Information – For example Quarter 1, 2014 or if Ad Hoc the Identifier
- Entity Name – Name of the Institution or Vendor
- Entity Contact – The Submit/Certify User, or if there are two it will instead display "Submit/Certify Users"
- Due Date – Formatted in MM/DD/YYYY format.
- Submission Date – Only applies to Approval/Unsubmit Emails. Formatted in MM/DD/YYYY format.

Types of Emails

Approval Email

The Approval Email is an email that will be sent out to the Entity when a Reviewer Approves their Survey Response.

While we do include a default Approval Email it can be customized upon request. This email can also be turned off by selecting DISABLE_APPROVE_UNSUBMIT_EMAIL in Survey Settings.

Unsubmission

The Unsubmission Email is an email that will be sent out to the Entity when a Reviewer Unsubmits their Survey Response. While we do include a default Unsubmit Email it can be customized upon request. This email can also be turned off by selecting DISABLE_APPROVE_UNSUBMIT_EMAIL in Survey Settings.

Publish Email

The Publish Email is an email that is sent out the first time a given Cycle Survey is published. In order for this email to go out, it must be set up by contacting ITSSEDMON.

Reminder Emails

Reminder Emails are emails that will go out automatically to all Entities that have not submitted their surveys by a set number of days before or after the Due Date.

Requesting Email Customization

To request a scheduled email, please send the following information to ITSSEDMON

- Should it affect all surveys under your owner, or a subset? If a subset, which ones?
- What type of email (Approval, Unsubmit, Publish, Reminder) you would like added
- The subject and text of the email. Please identify what items you want brought in from the system.
- If it is a Reminder Email, please also tell us how many days before/after the due date you would like it sent.

Manual Emails

You can also manually send emails from the system by doing the following

1. Go to Emails tab of the Survey (Note: You will need Survey Email privileges).
2. Select View Email Details.
3. Set up Recipients
    1. Entities can be added by selecting "Manage Entity Recipients"
    2. Survey Details Contacts can be Added by selecting "Add Program Area Contacts"
    3. Other recipients can be added by selecting "Add Non-Entity Recipient"
4. Finalize any changes to the Subject and Body by selecting Edit Details
5. Send the email by selecting Send Email

Once the Send Email button has been selected, the Sent indicator at the bottom of the page will change to Yes indicating it has been queued to be sent and a Date/Time will be added once it has been sent.

Frequently Asked Questions (Survey)

Frequently Asked Questions can be added at the Survey level as well as the Owner level. To add new FAQ Groups to the current survey, scroll to the bottom of the page and click Add FAQ Group for Survey. The rest of the process of creating and managing FAQs is the same as managing FAQs for the Owner.

Survey Editor

When editing a new Cycle Survey for the first time, it can appear confusing. The structure of the survey needs to be set up before any questions can be added. Every Cycle Survey needs to have at least one Section, one Page within that Section, and one Group within that Page.

Hierarchy of Survey Components

- **Survey**
  - **Cycle**
    - **Section**
      - **Page**
        - **Group**
        - **Group...**
      - **Page**
      - **Page...**
    - **Section**
    - **Section...**

Section

A section is the highest level of question grouping and consists of one or more Pages. Surveys can have multiple Sections, but only need to have at least one Section. When a survey is published with only one Section, the section name is not shown in the survey navigation.

Page

A page is the next level of question grouping and consists of one or more Groups that will be displayed on the page at one time. Instructions can be set at this level and will appear at the top of the page.

If the HIDE_OPTIONAL setting is checked, this page will not be printed on the PDF when no answers have been entered.

Notes:

-The questions on every page are auto-numbered, starting at 1 at the top of each page. This can be disabled if it is not desired (See the Survey Settings page of this manual).

-Answers on the current page are only saved when the user clicks one of the Save buttons at the top and bottom of every page ("Save", "Save and Continue", "Save and Submit").

-Pages with a large number of questions could increase page load time.

Conditional Page

Conditional Pages are Pages that are not shown by default during survey entry. Conditional Pages are created when selecting the Add Conditional Page option under an existing question of type Checkbox or Dropdown (See Question Editor Options below). One of the question choices must be selected as the required choice for the Conditional Page. When an Entity is filling out the survey, the Conditional Page will only be shown if the required choice has been selected. Any required questions on the Conditional Page are only required if the page is shown.

Conditional Pages are printed on the PDF if the required choice has been selected. If the HIDE_OPTIONAL setting is checked, the page will not be printed if no answers have been entered on the Conditional Page.

Group

A group is the lowest level that questions can be grouped together. Questions within a Group are enclosed by a border box. Instructions can be set at this level and will appear at the start of the Group with a yellow background. The name of the group may also be hidden if desired. Groups include a few optional settings:

- GROUP_LEVEL_REVIEW - By selecting this, review ratings/notes will be made at the Question Group level.
- HIDE_NAME - By selecting this setting, the name will not show up on the Survey.
- HIDE_OPTIONAL - If selected, this group will not be printed on the PDF when no answers have been entered.
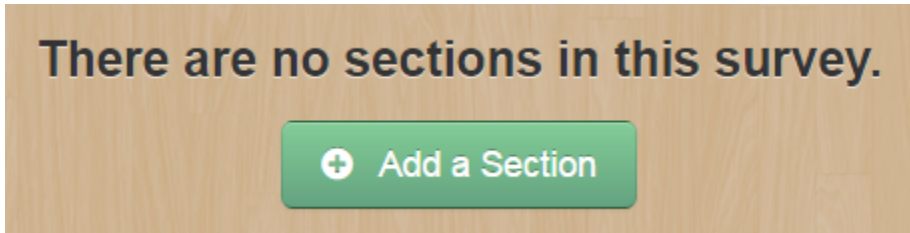
Dynamic Group

A dynamic group is a variation on a normal question group. Only basic question types can be added (apart from sub-questions), and the group can be filled out multiple times similar to the rows of a Dynamic Table (see Dynamic Table page in this manual). Dynamic Groups have the following optional settings:

- LIMIT_ROWS - The maximum number of times an Entity can fill out this question group. If left blank, there is no limit.

- DEFAULT_COLLAPSED - Iterations of a Dynamic Group each have a numbered heading reading Group 1, Group 2, etc. Clicking the heading will collapse that group, hiding all but the first question, which can shorten the page and make it easier to navigate. If this setting is selected, groups within this dynamic group will appear collapsed by default. Entities will have to click the heading to expand each group and fill them out.
- HIDE_NAME - By selecting this setting, the name will not show up on the Survey.
- HIDE_OPTIONAL - If selected, this group will not be printed on the PDF when no answers have been entered. This also applies to groups within the dynamic group. E.g. If Group 2 has no answers but Group 1 does, then only Group 1 will appear on the PDF.

Example Cycle Survey without any Sections:

Example Section without any Pages:
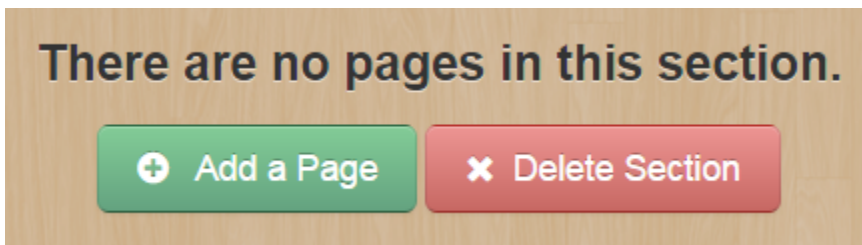
Example Page without any Groups:
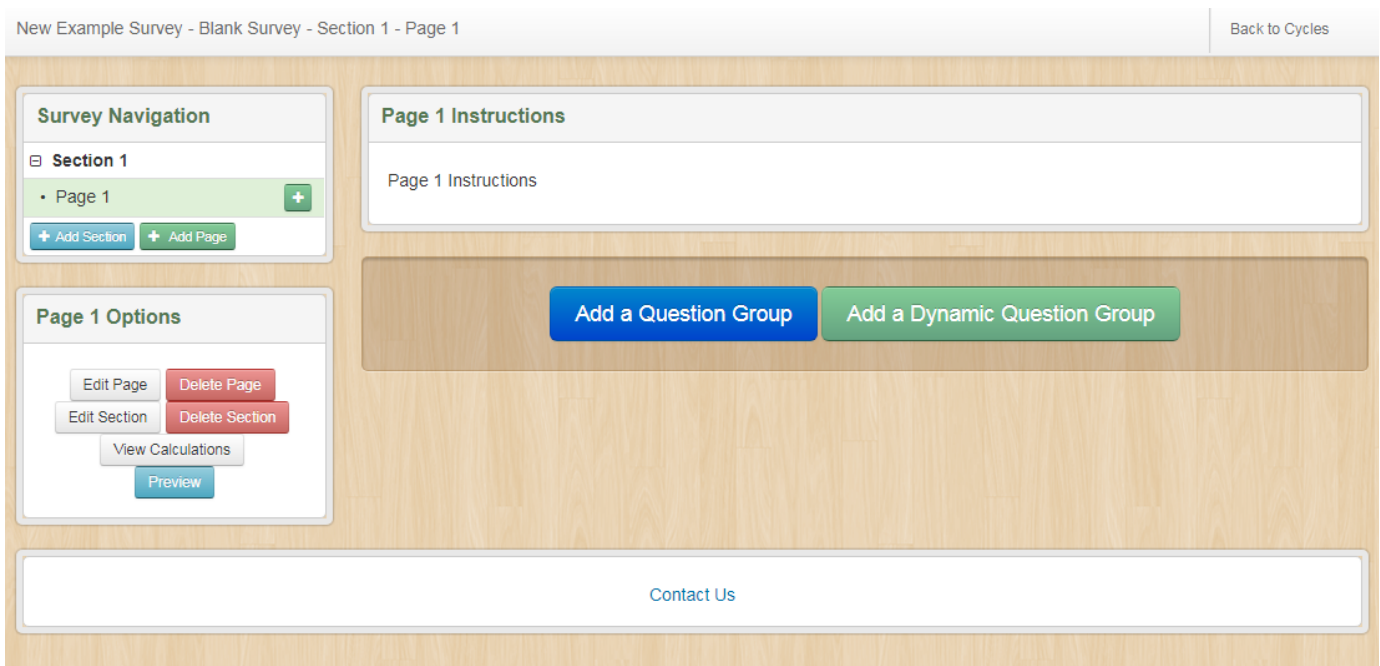
Survey Editor Options

Once the survey structure includes at least one Group or Dynamic Group, questions can be added by clicking the Add a Question button.

1. Survey Navigation - This pane lists the existing sections and pages in the survey. The currently selected page is highlighted green. Clicking the name of a different page will take the user to that page.
2. The Up and Down buttons beside each page may be used to reorder the pages within a section. The Up arrow next to each page will move that page up, and Down moves the page down. In surveys with multiple sections, the sections can be reordered the same way. The + (plus sign) button beside each page may be used to add a new page at that point in the section instead of at the end of the section.
3. Add Section, Add Page - These buttons are used to add additional pages and sections to the survey. By default, sections and Pages are organized in the order they were added.
4. Page Options - Additional options to interact with the current page of the survey.
    1. Edit Page - Opens the Edit Page window where the page name and instructions can be modified, and any page settings such as HIDE_OPTIONAL can be selected or deselected.
    2. Delete Page - Deletes the current page from the survey. If this option is clicked by accident, contact ITSSEDMON to have a deleted page restored.
    3. Edit Section - Opens the Edit Section window where the name, instructions, and settings for the current section can be modified.
    4. Delete Section - Deletes the current section from the survey. If this option is clicked by accident, contact ITSSEDMON to have a deleted section restored.
    5. View Calculations - Go to the Calculations page to view, create, and edit calculations to be used with this survey. For more details, see the Calculations section of this manual.
    6. Preview - Opens a new window with a preview of how the current page of the survey will look when it is being filled out by an Entity.
5. If the survey has two or more pages, the Previous and Next buttons will appear at the top of the survey in the Survey Editor. These may be used as an alternative to the Survey Navigation pane. Clicking the Previous or Next buttons will load the previous or next page in the survey. Entities filling out the published survey will not see these buttons.
6. Page Instructions - This pane displays the page instructions for the current page, if any have been entered. This text can be changed by clicking Edit Page under Page Options (see above).
7. Edit Group Details - Opens the Edit Group window where the group name and instructions can be modified, and any group settings can be selected or deselected.
8. Delete Group - Deletes the current group from the survey. If this option is clicked by accident, contact ITS-SEDMON@nysed.gov to have a deleted group restored.
9. Group Instructions - This section below the Group heading displays the instructions for the Group if any have been entered. This text can be changed by clicking Edit Group Details.
10. Add a Question - This button opens the drop-down list of question types that can be added to the group. Selecting an option from the list will open a window to add a new question of that type to the bottom of the current group. The contents of the Add/Edit Question window vary depending on the type of question selected. The next section of this manual describes all of the different question types in detail.

Edit Question Options

After at least one question has been added, the question is displayed in the survey editor and more options become available.

Group A   Edit Group Details   Delete Group   Paste as end of Group

Instructions here   **11**

① Checkbox   **1**

Report Title: checkbox

2
☐ Blue
☐ Red

3 ✎ Edit Question   **4** ☰ Bulk Add Choices   **5** ✖ Delete   **6** ＋ Add Question Above ▾   **7** ＋ Add Sub-Question ▾   **8** ＋ Add Conditional Page   **9** Copy   **10** Move

1. Question Name - The name of each question is displayed. Question numbers appear to the left of the name. Required questions have a red asterisk appearing to the right of the name indicating they must be completed.
2. Question Content - The content of the question depends on the question type (text field, checkbox list, file upload, etc.). Below the question content, the instructions for this particular question are displayed. These instructions can be changed by clicking Edit Question (see below).
3. Edit Question - Opens the Edit Question window where the name, instructions, and various settings and validation of the question can be changed. The question type cannot be changed.
4. Bulk Add Choices - For Checkbox and Dropdown questions, larger numbers of choices may be added all at once rather than adding them one at a time through the Edit Question window. To use the Bulk Add Choices window, click Bulk Add Choices and then type or paste a list of choices, one per line, into the text box that appears and click Save.
5. Delete - Deletes this question. If this option is selected by accident, contact ITS-SEDMON@nysed.gov to restore the deleted question.
6. Add Question Above - Similar to the Add a Question button, this dropdown adds a new question above the current question instead of at the bottom of the group.
7. Add Sub-Question - This dropdown will add a new question as a sub-question of the current question. (See the advanced question type Sub-Questions in this manual)
8. Add Conditional Page - Opens the Add Page window to create a new Conditional Page dependent on the chosen question. (See Conditional Page above)
9. Copy - Copies the current question. Click the "Paste as end of Group" button (see below) to place the copied question at the bottom of that group, or click the "Paste above this question" button that appears in this area to paste the copied question above that question. If the question does not need to be copied after all, click the "Cancel Copy/Move" button under Page Options to discard the copy and hide all the Paste buttons.
10. Move - Similar to Copy, except the existing question is removed when the new copy of the question is pasted. If this question does not need to be moved after all, click the "Cancel Copy/Move" button under Page Options to cancel the move.
11. Paste as end of Group - Only appears after an existing question has been Copied or Moved (see above). Places the selected question at the end of the group.

Question Types

There are several types of questions that can be created in the system.

Simple Types

Text

Text Area

Drop Down

Check Box

Date

Document

Advanced Types

Matrix Table

Dynamic Table

Narrative

Sub Questions

External Variable

Calculations

Question Types - Text

Text questions are the simplest type of questions available in the system and should be used for Short Text questions or for Numeric questions.

Fields

Question

The question name as it will appear to the users.

Report Title

The question name as it will appear in Cognos reports. Should be kept short.

Instructions

Any question specific instructions that will appear below the question.

Settings

Redacted

By selecting this setting, the question will have "[REDACTED]" listed as its answer in the printed PDF.

Validation

Required

Indicates that this question must be answered in order to submit.

Numeric Value (no decimals)

Indicates the answer must be a whole number.

Numeric Value (allow decimals)

Indicates the answer must be a number but it can have decimals.

Numeric Value (unformatted)

Indicates the answer must be a number but not have comma separators or a decimal, or be totaled if in a Matrix/Dynamic Table.

Between Minimum and Maximum

If the question is validated as a number it sets the minimum and maximum values. Otherwise the answer length must be between the minimum and maximum amount of characters.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Text Area

Text Area questions should be used for longer format questions where the user will enter several sentences or longer. The user will also be shown a word count and be able to format their responses.

Notes:

-Pasting from Word, while supported with the Paste from Word button, may result in formatting issues depending on the version of Word being used.

-Very long responses cannot be viewed in Cognos reports.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos reports.

Instructions

Question specific Instructions.

Validation

Required

Indicates that this question must be answered in order to submit.

Between Minimum and Maximum

Sets the minimum and maximum amount of words that will be accepted.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Drop Down

A drop-down question is a multiple choice question where only one choice can be selected.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos.

Instructions

Question specific Instructions.

Settings

Alphabetize Options

By selecting this, the answer choices will be sorted alphabetically when this question is saved.

Auto Complete

By selecting this, the dropdown will become an auto-completer.

Hide Unchecked Choices

By default, all choices in checkbox and radio button lists will be displayed when the survey is printed, and those that were chosen by the Entity will be indicated with a check mark. If this setting is selected, only the choices that were chosen will be printed.

Radio Button

By selecting this, the Drop Down will be displayed as radio buttons.

Redacted

By selecting this, the question will have "[REDACTED]" listed as its answer in the printed PDF.

Answer Choices

Each Answer Text is one of the choices that may be selected. To add additional choices, "Add Another Choice" should be selected, and to remove a choice the red button with an X in it should be selected. At least one choice is required.

Validation

Required

Indicates that this question must be answered in order to submit.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Check Box

Check box questions are multiple choice questions where any number of choices may be selected.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos.

Instructions

Question specific Instructions.

Settings

Alphabetize Options

By selecting this setting, the answer choices will be sorted alphabetically when this question is saved.

Hide Unchecked Choices

By default, all choices in checkbox and radio button lists will be displayed when the survey is printed, and those that were chosen by the Entity will be indicated with a check mark. If this setting is selected, only the choices that were chosen will be printed.

Answer Choices

Each Answer Text is one of the choices that may be selected. To add additional choices "Add Another Choice" should be selected, and to remove a choice the red "X" button should be selected. At least one choice is required.

Note: If a large number of choices are entered, they will be displayed to the user in a column layout instead of a single list. More than 10 choices will be divided evenly across 2 columns, and more than 20 will be divided across 3 columns.

Validation

Required

Indicates that this question must be answered in order to submit.

Require All Choices

Indicates that all choices must be selected that is intended for Assurances style questions where the user must agree to all of them.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Date

Date questions are questions where the answer must be a date. When selected, a date picker will appear allowing the user to select the desired date.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos reports.

Instructions

Question specific Instructions.

Validation

Required

Indicates that this question must be answered in order to submit.

Between Minimum and Maximum

Indicates that the selected date must occur between the Minimum and Maximum.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Documents

Document questions allow the user to upload one or more documents.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos reports.

Instructions

Question specific Instructions.

Validation

Required

Indicates that this question must be answered in order to submit.

Allowed Document Types

- Power Point Document
- ZIP
- Text Document
- PDF
- Excel Document
- Image

Between Minimum and Maximum

Indicates the Minimum and Maximum number of uploads allowed. (Optional)

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Question Types - Matrix Table

A more complicated question that consists of Rows and Columns where each column is a different question. After the table has been added, options to add rows and columns will appear. Only basic questions can be added as columns.

Fields

Question

The name of the question as it will be displayed to the user.

Report Title

The name of the question as it will be displayed and looked up in Cognos.

Instructions

Question specific Instructions.

Matrix Table Header

Text that will appear in the top left corner of the Matrix Table.

Settings

HIDE_NAME

The name entered in the "Question" field of the matrix table will not be shown.

HIDE_TOTAL

The total row of the matrix table will not be shown.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Additional Functions

⟷ Reorder and Resize Columns

Change the order and relative widths of columns in the table. Each column order number is required and must be a positive integer, and more than one column cannot have the same order number. Each column width must be expressed as a number representing a percentage of the total width of the table. This button will not appear to entities filling out the survey.

⤢ Full-screen Mode

Expand the table to fill the screen, or return to the normal view. May allow for easier reading for larger tables. This button is available to entities filling out the survey.

Question Types - Matrix Table - Rows and Columns

A Matrix table row is a collection of questions sharing one common theme.

Rows

Fields

Name

The name of the row as it will be displayed to the user.

Report Title

The name of the row as it will be displayed and looked up in Cognos.

Columns

A Matrix Table Column is a question that can be answered for each row and can be any of the Basic Question Types. If the column is a numeric question, a total will be displayed at the bottom of the table.

Question Types - Dynamic Table

Dynamic Table is an advanced question similar to a Matrix Table where columns of questions are added, however rows are not named and are added as needed by the Entity User. After the table has been created, an option to add columns will appear. Only basic questions can be added as columns.

Fields

Question

The question name as it will appear to the users.

Report Title

The question name as it will appear in Cognos. Should be kept short.

Instructions

Any question specific instructions that will appear below the question.

Validation

LIMIT_ROWS

Used to limit how many rows an Entity can add.

Rubrics

Rubrics or rating systems may be selected for use by reviewers during the review process. Contact ITS to discuss setting up new rubrics for use with a survey.

Additional Functions

Reorder and Resize Columns

Change the order and relative widths of columns in the table. Each column order number is required and must be a positive integer, and more than one column cannot have the same order number. Each column width must be expressed as a number representing a percentage of the total width of the table. This button will not appear to entities filling out the survey.

Full-screen Mode

Expand the table to fill the screen, or return to the normal view. May allow for easier reading for larger tables. This button is available to entities filling out the survey.

Question Types - Narrative

Narrative Questions aren't really questions. They are a block of text that can be added in place of a question.

Fields

Name

The name that will appear above the narrative.

Instructions

The narrative that will appear.

Settings

HIDE_NAME

The name of the narrative section will not be shown.

Question Types - Sub-Question

Basic question types can be added as sub-questions to other questions.

Required Choice

Which response from the parent question is required to show this question?

The Required Choice field is shown if the parent question is a Drop Down or Check Box. Selecting "No choice required" means the sub-question always appears. Selecting any of the parent question choices makes the sub-question an optional sub-question. Optional sub-questions will only appear if the required choice was selected in the parent sub-question.

The remaining fields and settings for creating the sub-question are the same as those for creating a normal question of the chosen type.

Question Types - External Variable

External variables are read-only questions that hold a predetermined data value. This can be useful for providing entities with specific information they need to fill out the survey, such as allocation amounts, BEDS enrollment data, etc. External variables need to be configured by ITS before they can be used in surveys. Once a variable has been added to a survey, entity-specific data will be loaded overnight.

Fields

Question

The question name as it will appear to the users.

Report Title

The question name as it will appear in Cognos reports. Should be kept short.

Instructions

Any question specific instructions that will appear below the question.

Variable

A list of available variables that may be used on this survey.

Settings

UNFORMATTED

By default, variables will be displayed with some basic formatting (dollar signs, commas, etc.). Selecting this setting will display the raw unformatted value instead.

Notes:

If no variables have been created for an owner, the External Variable question type will not appear in the dropdown when choosing to add a new question. It will only appear when there is a variable available to be selected. If you wish to have a new variable created for a survey or be given access to an existing variable that is pertinent to the Owner, contact ITS-SEDMON@nysed.gov.

External variables are currently not compatible with Cognos reports. If you create variables that will be needed in reports, contact ITS-SEDMON@nysed.gov.

Question Types - Calculation

Calculations are numeric questions where the answer is produced automatically based on the answers given for other numeric questions (text questions that are validated as numbers). Calculation questions can reference answers from other pages of the survey, and perform mathematical operations on two or more answers (addition, subtraction, multiplication, division) to produce a new result.

See the Calculations section of this manual for more information on creating and using calculations within a survey.

System Downtime

Production

IT staff try to limit downtime as much as possible in production, but the system may need to be taken down briefly for server maintenance or updates. In case of system updates, we aim to have them done between 3:30 PM and 4:00 PM and notify staff in advance. In case of an emergency, an update may need to occur in the middle of the day in, which case staff will be notified.

When downtime is scheduled in advance for planned maintenance, users will see a message in the system up to 48 hours prior to the scheduled start time, notifying them of the scheduled downtime and recommending they save their work and exit the system before downtime begins. The specific wording of this message may vary depending on the reason for downtime.

While system downtime is in effect, everything in the system will be unavailable except the Contact Us page. Users attempting to access the system are notified when maintenance or updates are expected to be completed.

Test

In the test environment, the system will be brought down for updates more often. If you are planning a demo, please send an email to ITS-SEDMON@nysed.gov with the time and we will hold off doing updates during that time.

Tokens

Tokens act as placeholders where survey-specific or entity-specific information will appear when the survey is published. When entering the Name or Instructions for a question, or when creating a Narrative, tokens can be inserted by clicking on the [T] button in the text editor, then selecting the token you want. This will insert a token at the last location selected. The token will then be replaced with the corresponding value when the survey is viewed by an Entity.

The available tokens are :

- Survey Name ($$SURVEY_NAME$$) - The name of the Survey
- Cycle Information ($$CYCLE_INFO$$) - The cycle information such as Quarter 1, 2014
- Entity Name ($$ENTITY_NAME$$) - The name of the Entity filling out or who filled out the Survey
- Due Date ($$DUE_DATE$$) - The date the survey is due
- Survey Email ($$SURVEY_EMAIL$$) - The Survey Contact email address entered into Survey Details
- Institution ID ($$INST_ID$$) - The Institution ID of the Entity filling out or who filled out the Survey
- BEDS Code ($$BEDS_CODE$$) - The BEDS Code of the Entity filling out or who filled out the Survey
- County ($$COUNTY$$) - The county where the Entity institution is located
- SEDREF CEO Name ($$CEO_NAME$$) - The first and last name of the CEO of the institution on SEDREF
- SEDREF CEO Title ($$CEO_TITLE$$) - The title of the CEO of the institution on SEDREF
- SEDREF CEO Email ($$CEO_EMAIL$$) - The contact email of the CEO of the institution on SEDREF
- SEDREF CEO Phone ($$CEO_PHONE$$) - The contact phone number of the CEO of the institution on SEDREF
- SEDREF Title 1 Contact Name ($$TITLE_1_NAME$$) - The first and last name of the Title 1 coordinator on SEDREF
- SEDREF Title 1 Contact Title ($$TITLE_1_TITLE$$) - The title of the Title 1 coordinator on SEDREF
- SEDREF Title 1 Contact Email ($$TITLE_1_EMAIL$$) - The contact email of the Title 1 coordinator on SEDREF
- SEDREF Title 1 Contact Phone ($$TITLE_1_PHONE$$) - The contact phone number of the Title 1 coordinator on SEDREF
- SEDREF Physical Address ($$PHYS_ADDRESS$$) - The physical address where the Entity institution is located
- SEDREF Physical City ($$PHYS_CITY$$) - The city where the Entity institution is located
- SEDREF Physical State ($$PHYS_STATE$$) - The state where the Entity institution is located
- SEDREF Physical Zip ($$PHYS_ZIP$$) - The ZIP code where the Entity institution is located

Before Publishing

Surveys are not available to be filled out by Entities until they are published. Before you publish a survey, there are a few things you may want to think about.

- Make sure all the appropriate Entities are assigned to the survey, or if this survey is going to have a pilot period, only the pilot Entities are assigned.
- Double-check the survey for text mistakes and make sure all Required questions and Optional sub-questions are configured appropriately.
- Consider making changes to the Welcome Message.
- Consider whether to set up the various optional automated system emails for the survey, including a customized Publish Email.
- Consider setting up FAQs for the survey to help provide assistance to users.

Workflow Administration

Workflows for the currently selected Owner can be created or modified from the Workflow page under the Owner Details menu.

Workflow Details

The Workflow Details page gives a basic overview of the workflow and any special settings related to it.

Fields

Name

The name of the workflow as it will be displayed to the user maintaining the survey. Required.

Description

An description of the workflow to help users select the workflow that is right for them.

Workflow Diagram

The workflow diagram page is used for building the workflow itself out of Stages and Relationships. To edit existing Stages or Relationships, click the stage (displayed as a rounded box) or relationship (displayed as a blue arrow). To add new Stages or Relationships, use the menu options Add Stage or Add Relationship on the menu to the left.

Default Workflow Diagram

Stages

A stage is a particular step in the workflow and is represented in the diagram as a white box with a blue border with its name in the center.

Types of Stages

Not Submitted

The Not Submitted stage is a special stage that can not be set by users and indicates the starting point of the workflow and will always appear at the top of the workflow diagram. At this stage the survey answers can be modified.

Data Entry

Data Entry stages are generic versions of the Not Submitted stage and can be placed by users and modified to a greater degree than the Not Submitted stage. At this stage the survey answers can be modified.

Approved

The Approved stage is another special stage that can not be set by users and indicates the end point of the workflow.

Routing

Routing stages are a stage at which no reviewing is done but the user can determine with relationship to take to the next stage.

Review - Independent

Independent Review stages are review stages where each group/user doing the review can not see any review notes made by anyone other than themselves.

Review - Group

Group Review stages are review stages where users can see review notes made by other users.

Settings

Display Value

This name will be displayed to non NYSED users (Optional).

Draft

Only available in Data Entry stages. If selected, Data Entry users will be able to submit at this Stage.

Relationships

A relationship represents a path that a survey can take from one stage to the next and on the diagram is represented by a blue line that has a label giving its name half way along it and an arrow on the receiving end of the relationship.

Relationship Types

Assign All

Assign All relationships are where the assignment is done automatically and they will assign the stage to all groups associated with it.

Assign Group

Assign Group relationships allow for specifying which groups will be completing the associated stage.

Assign Individual

Assign Individual relationships allow for specifying specific members of groups that will be completing the associated stage.

Return

Return relationships will result in one of two things depending on if the associated stage has been assigned to before. If it the survey in question HAS passed through the associated stage before it will be reassigned to the user that had it at the stage previously. If the survey has NOT passed through the associated stage before it will be assigned to the users that have previously had the survey at any stage that are associated with that specific stage.

None

None relationships will result in the survey being moved to the associated stage but not assigned to anyone. This is intended for the Approved stage and any other end points.

Settings

Trigger Emails

The system can be set up to send an automated email when a survey is moved through a given relationship. The users assigned to the survey in the end stage of the relationship will receive an email notifying them that they have a new survey available for review.

Trigger Calculations

The system can be set up to trigger the updating of on-demand surveys by the institution that are not currently in Data Entry, Not Submitted, or Approved. This setting is for on-demand surveys with Calculations that may depend on the data from all submissions by that entity.

Survey Entry

Overview

The following section describes the process of logging into SED Monitoring, filling out and submitting a survey.

Logging In And Navigating

Users get to the SED Monitoring application by going to the NYSED Application Business Portal at https://portal.nysed.gov/abp. After logging in with their SEDDAS user name and password, they will be presented with a list of applications they have been given access to. Clicking

SED Monitoring and Vendor Performance System will take them to the SED Monitoring application landing page.

Selecting an Owner

Some users will be assigned to surveys from multiple program areas (Owners). Those users will be given a choice of which Owner to view surveys for. If they are not assigned to more than one owner, this screen will be skipped.

Selecting a Survey on the Dashboard

The user dashboard gives an overview of all surveys currently assigned, and gives options to view or print current or past surveys.

1. Users can return to their dashboard at any time by clicking the Dashboard link at the top of the page. There is also a Help menu, which includes an FAQ page and the Contact Us page.
2. The Owners pane lists all the Owners the user has access to. The number beside each Owner name indicates the number of surveys awaiting submission. Owners without a number have no outstanding surveys.
3. The Inbox tab is the main view on the Dashboard. The number beside the Inbox tab header indicates how many assigned surveys are available to submit. This number only includes surveys for the currently selected Owner.
4. Completed surveys may be viewed by clicking the Outbox tab.
5. If an assigned survey can be filled out multiple times, the Create New Survey tab can be used to create a new copy of the survey. A dropdown list will be presented to select which survey will be created.
6. Each row in the Inbox tab indicates the name and cycle of the survey and which entity it is assigned to. (Some users may be permitted to view surveys for multiple Entities)
7. The Status indicates what stage of the review process the survey is currently in. Surveys are sorted by Due Date by default, but can be sorted by any column by clicking the column headings.
8. Click the View button in a survey's row to begin filling out that survey.
9. The survey may be printed or saved as a PDF by clicking Print.
10. A blank copy of the survey can be printed or saved as a PDF by clicking Print Blank.

Data Entry

When a survey has been assigned to an Entity, it can be filled out and submitted by that Entity. Not all entity users can make changes or submit the survey. Check the page "Access to the System - Entity" in this instruction manual to see the different user roles and what they can do.

1. The sub navigation bar shows the name of the survey, cycle, and current page. If the survey has multiple sections, the current section is listed as well. If the current page has been modified already, the date it was mostly recently modified is displayed as well.
2. The Survey Navigation pane lists all of the pages in the survey. If a survey is divided into multiple sections, it will list all the sections and just the pages within the current section. Clicking on a page title will take the user to that page of the survey.
3. The Survey Instructions appear on the left side of every page. This pane is not displayed if there are no survey-level instructions.
4. Some surveys have Supporting Documents available for users. Click on the name of the document to download it. The Documents pane is not displayed if there are no documents available for the current survey.
5. The Comments pane allows Entity users to leave comments on the survey for reviewers, as well as see comments left by other users.
6. Whenever the user wants to save their progress on the survey, they can click the Save or Save & Continue buttons. The Save button will save all responses on the current page, and any validation errors will be shown. The Save & Continue button will do the same, and if there are no validation errors, the user will be taken to the next page to continue the survey.
7. The Identifying Label only appears on On-Demand surveys, which can be filled out multiple times. The label is used to distinguish between multiple submissions of the same survey. An Entity with multiple submissions cannot use the same label more than once for the same survey. The program area that published the survey will usually offer guidance on what the label should be, but it is up to the Entity user to select an appropriate unique label for their survey.
8. The main content area of the page will show a series of questions, arranged into groups.

Questions that have a red asterisk next to their name are Required questions; the Entity must enter a response. Required questions that have not been answered will generate validation errors when the user clicks Save. All questions with errors are highlighted in red after clicking Save, and these errors will need to be resolved before the survey can be submitted.

Questions are typically numbered, with each question number appearing in a circle to the left of the question, but some surveys may be numbered differently.

Users should always check with the program area contact first if there are any questions about filling out a specific survey.

NOTE: For on-demand surveys, if users accidentally create a new survey that is not needed, the Identifying Label should be changed to "DELETE". The system will delete the unneeded survey.

Importing Previous Answers

Some surveys will import or "roll over" answers from the previous cycle (year, school year, etc). This process will normally occur automatically. Any questions that have been changed in the new cycle will not have their answers rolled over from the previous cycle.

If the current survey for an Entity was not rolled over automatically, a Roll Over Previous Answers button will appear at the top of the page during survey entry. This option must be selected before any new answers have been entered.

Roll Over Previous Answers

Answers for this survey may be pre-loaded from the previous cycle. This must be done before entering any new answers.

Roll Over Previous Answers

Roll Over Previous Answers

Depending on the length of the survey, this process may take several minutes to complete. Survey questions that have been changed since last cycle will not have their answers copied over.

WARNING: Loading answers from the previous cycle will erase any new answers that have already been entered into the current cycle.

Load Previous Cycle Answers
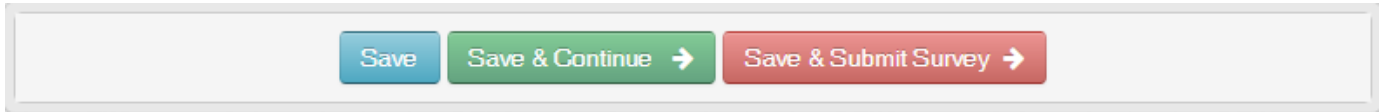
Close

If an Entity begins entering answers into a survey but later decides they wish to import previous answers, the new answers will have to be discarded before the previous answers can be rolled over. The Delete Page Answers button at the bottom of each page can help with this.

Save   Save & Continue →   Save & Submit Survey →   Delete Page Answers
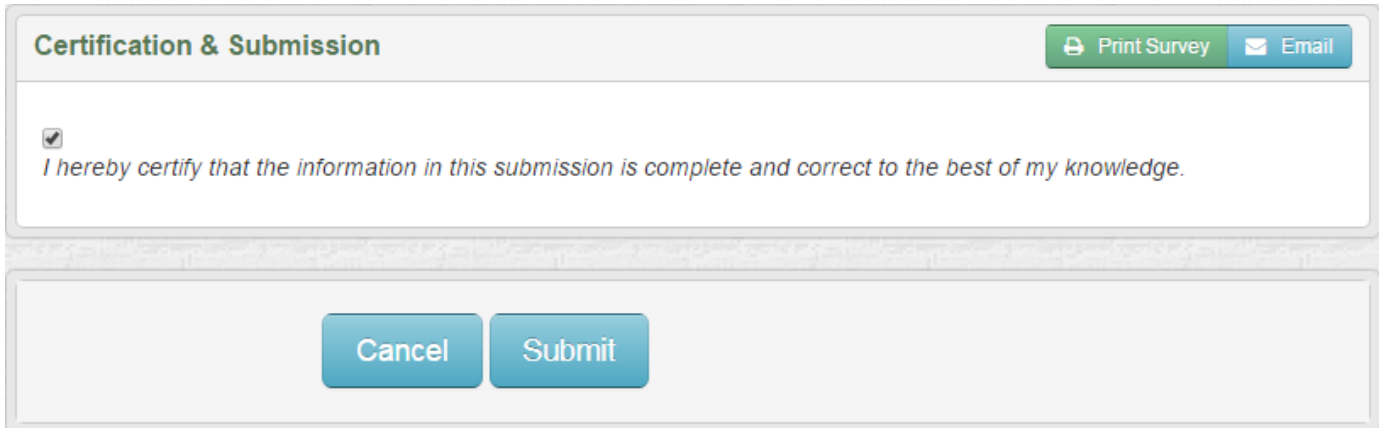
Submission

When all required questions have been completed and there are no outstanding errors, the completed survey may be submitted. The survey can only be submitted by the Submit/Certify user for that Entity. If the Entity is an institution or vendor, this user is the CEO of that institution or vendor.

The Submit/Certify user will see a Save & Submit Survey button at the top and bottom of each survey page. This will take them to the Certification & Submission page.

If the user agrees to the certification text on the certification page, they must check the box indicating their agreement and click Submit. The text on the Certification & Submission page is created by the program area and is specific to the survey. Submit & Certify users should ensure they have read and agree to the certification text before checking the box and clicking the Submit button.

After submission, the submitted survey will no longer appear in the Entity's Inbox on the Dashboard page. It will still be visible in the Outbox.

Note: Certain surveys may be configured to not require CEO certification for certain data entry stages. If this is the case, all users with the Data Entry role will be able to submit the survey as well. The program area should notify districts if CEO certification is not required.

For surveys where the assigned Entity is a specific user, the user will have ability to certify and submit their own surveys.

Review Process

Overview

This section describes the process of reviewing survey submissions.

The Review Process

When a survey has been submitted (or otherwise moved to the next step in the workflow), staff who have been assigned to review the survey will find the survey listed in their Inbox on the Dashboard screen. The list of surveys on this screen is usually sorted by descending Status Date by default, but may be resorted by clicking on any of the column headings.

1. Staff can see their Inbox by going to the Dashboard. If staff are only assigned to review surveys for a single owner, they will go straight to the Dashboard screen when they log in. Otherwise, they will first see a list of Owners or Surveys for which they have privileges.
2. The number beside the Inbox tab indicates how many surveys assigned to this staff member (or their group) are currently awaiting review. This number only includes surveys for the currently selected Owner.
3. Completed reviews may be viewed by clicking the Outbox tab.
4. The Owners list on the left will show all Owners the staff member is assigned to. Owners with outstanding surveys awaiting review will have a number beside the Owner name indicating the number of pending surveys. Those without a number have no pending surveys.
5. Each row in the Inbox tab indicates the name and cycle of the survey, and the entity that filled it out.
6. The Status indicates what stage of the review process the survey is currently in, and the Status Date shows when it passed to this stage.
7. Staff will click View to view the survey and begin the review.
8. The survey may be printed or saved as a PDF.

Reviewing A Survey

Reviewers will be taken to a page similar to this to review the survey.

Review Page

1. The left sidebar will show the Entity name and the current status of the survey in the Reviewer Help pane. (More details below)
2. An example note left on a survey by reviewers. The color and icon on the note corresponds to the type of note (See Note Legend below). Text in the upper right corner of the note will indicate whether or not it is visible to the survey recipient (or will be when the submission is unsubmitted).
3. The username of the staff member who left the note and the date it was last modified. This will never be visible to the Entity. Entity users will just see titles such as Reviewer or Recipient.
4. New notes will have controls to edit or delete the note in the bottom right corner. These will never be visible to the Entity.
   1. Reply: Both entity users and reviewers may reply to a note. Replies are listed in order below the original note. Once a note has been replied to, it can no longer be edited or deleted.
   2. Mark Resolved: Only reviewers can mark a note as resolved. This changes its status to Resolved and hides it by default. Resolved notes can still be viewed by changing the note filters (see Reviewer Note Filter below).
5. The Flag Response option may be toggled on or off to highlight a question, such as to indicate to an Entity that there is a problem with a question. Pages that contain flagged questions will be highlighted in the Survey Navigation pane with a flag icon.
   1. This feature is being replaced with the newer Note feature, which includes the option to set several types of flags.
6. Add a new note to this question. Staff will be able to choose the visibility of the note (Entity or Reviewer).
7. The Compare button may be used to compare the response to this question to a previous version. If the current response has changed from the previous version, the button will be highlighted orange. The button is pale blue otherwise.
8. When staff are finished reviewing the survey, they must choose an action to complete the review. (More details under Reviewer Help below)

Note Legend

⊗ Who entered the note and when

Note associated with an Error Flag

❓ Who entered the note and when

Note associated with a Warning Flag

ℹ Who entered the note and when

Note associated with an Info Flag

✓ Who entered the note and when

Note associated with flag that has been resolved
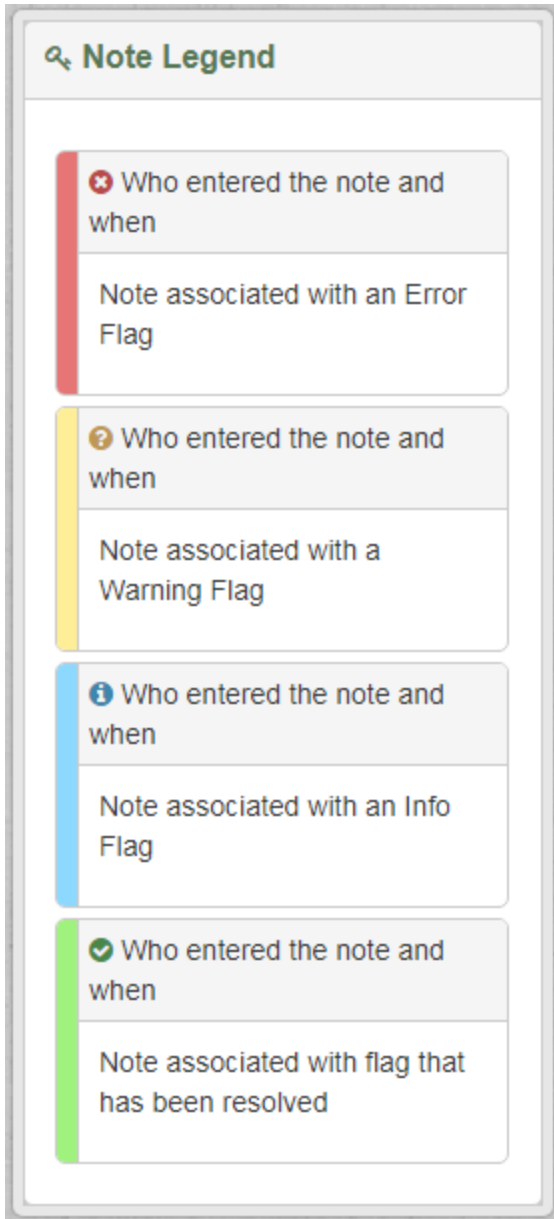
Survey Navigation

The Survey Navigation pane may be used to move between pages of the survey. The currently selected page is highlighted in green with an arrow on the right. The image below is an example from a Smart Schools Bond Act survey.

The icons on the right side of each page in the Survey Navigation provide some information about the page's contents.
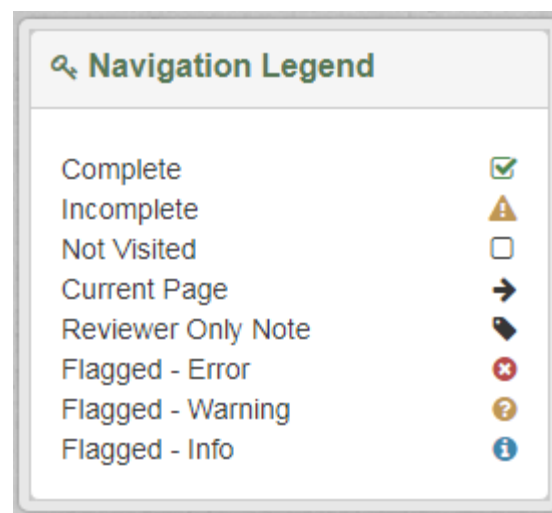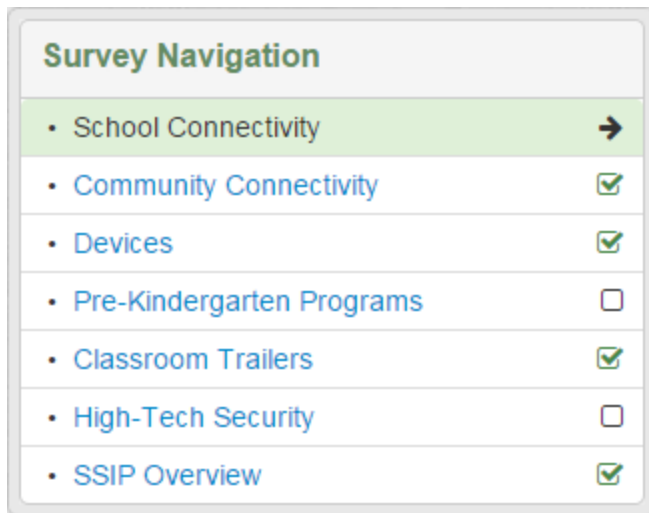
- Complete: The Entity user has saved their responses and completed this page.
- Incomplete: The Entity user has saved the page but may not have completed all required questions, or may have had validation errors.
- Not Visited: The Entity user has not saved any responses on this page. There is typically nothing for a Reviewer to review on these pages.
- Current Page: The page currently being viewed.
- Reviewer Only Note: The page contains notes that are only visible to Reviewers. If this survey is to be sent back to the Entity, Reviewers should read and Reviewer-Only notes and ensure they have been addressed internally, or else make them visible to the Entity if the note should be seen by Entity users upon unsubmit.
- Flagged - Error: The page contains reviewer notes with the flag type Error.
- Flagged - Warning: The page contains reviewer notes with the flag type Warning, but no unresolved Error notes.
- Flagged - Info: The page contains reviewer notes with the flag type Info, but no unresolved Error or Warning notes.

Reviewer Help

The Reviewer Help pane includes specific information for reviewing this particular survey, and the buttons for completing the review. The buttons available will vary depending on the workflow for that survey. These may include options to Unsubmit, Approve, Mark Completed, and more. If the survey has been assigned to multiple groups, all parties may be required to mark their review completed before the survey can be moved along in the workflow.

In the default workflow, Unsubmit sends the survey back to the Entity for corrections, and Approve approves it. If the survey does not use the default workflow, make sure you understand your role within the workflow and what each review option will do.

Here's an example of how the Reviewer Help pane looks on an Ed Tech test survey:

Reviewer Help

ALBANY CITY SD

Submitted

This survey has been assigned to you to complete a review. The add note button can be used to attach a note to any question in the survey and can be set to be viewed by other reviewers only or by external users that have filled the survey out.

Please note that if you send it back to be corrected all external notes (those in red) will be visible to those making the corrections.

Unsubmit

Send to NYSED

Key:

Entity Visible Notes

Reviewer Only Notes

Deleted Notes

Comparing Questions

- Answer has not changed

- Answer has changed

Currently Viewing:
Submitted - 11/5/2015 12:46PM

View Other Version ▾

Compare to: Last Submitted ▾

If the survey has been previously unsubmitted, staff may have the option to view previous versions of the survey by clicking View Other Version. Clicking the dropdown arrow by the Compare To line will let staff change which previous version of the survey they are comparing the currently selected version to.

Reviewer Note Filter

Check or uncheck the options in this pane to select which notes to view on this screen. Deleted and Resolved notes are usually hidden by default.

This function does not show or hide notes for other users, it simply filters which notes you are currently looking at.

Entity Users

This pane shows a list of users for the Entity and what permissions they have. Clicking the "+" icon beside a user's name will display their user name and email.

Status History

This pane shows a list of versions of the survey submission, the workflow statuses each version has gone through, and the date and time each step in the review process took place. A new version is typically created each time a submission is unsubmitted and sent back to the Entity. By default, only the most recent version is shown. Clicking the "+" icon beside a version number will show or hide the status list for that version.

Status History	Close
Version 5	+

Submitted - 11/5/2015 12:46PM

Not Submitted - 9/3/2015 12:33PM

Version 4	+
Version 3	+
Version 2	+
Version 1	+

Comments

In addition to notes on specific questions, staff may leave survey-wide comments using this pane. Entity users have the ability to view and add comments to this pane as well. Clicking the "+" icon next to a comment will expand it to show the full comment and the user who created it. Staff will also see buttons to edit or delete their own comments.

Comments	Add
11/9/2015 @ 10:23AM	+

[Edit] [Delete]

Overall survey comments...

Created By: dmayer2

Calculations

Overview

The calculation module allows for the creation of calculations using values from a variety of sources and displaying their results to recipients and reviewers. These calculations are run both on the fly (via JavaScript) as the recipient enters data as well as when they save a page. While the on the fly calculations are mostly for display purposes when the page is saved the results are added to the database and will be able to be retrieved in Cognos.

Calculations can also reference data in several different ways

- Fields from the survey
  - User Entered Numeric Questions
    - Only Text Questions validated as numbers can be referenced by the calculation.
  - Other Calculation Questions
    - Other questions that get their values from calculations can be referenced by the calculation
  - External Variables
    - External Variable questions that get their values from other Databases can be referenced by the calculation
- Static Values
  - Static Values that do not change can also be referenced.

Currently calculations can perform several basic mathematic operations such as Addition, Subtraction, Multiplication and, Division as well as supporting Parenthesis to define the order they should be executed. Other can be added at a later date if desired

Note: All calculation values are currently rounded to the 2nd decimal place when shown to the users. However the values stored in the database and used in the calculations themselves are rounded to approximately the 10th decimal place. This is done so that there are no rounding issues resulting from calculations that pull data from other calculations.

Accessing the Calculation Module

Before a calculation can be used in a question it much first be created by selecting the "View Calculations" button in the Page options panel of the Survey Form. The Form must not currently be published for the button to appear.
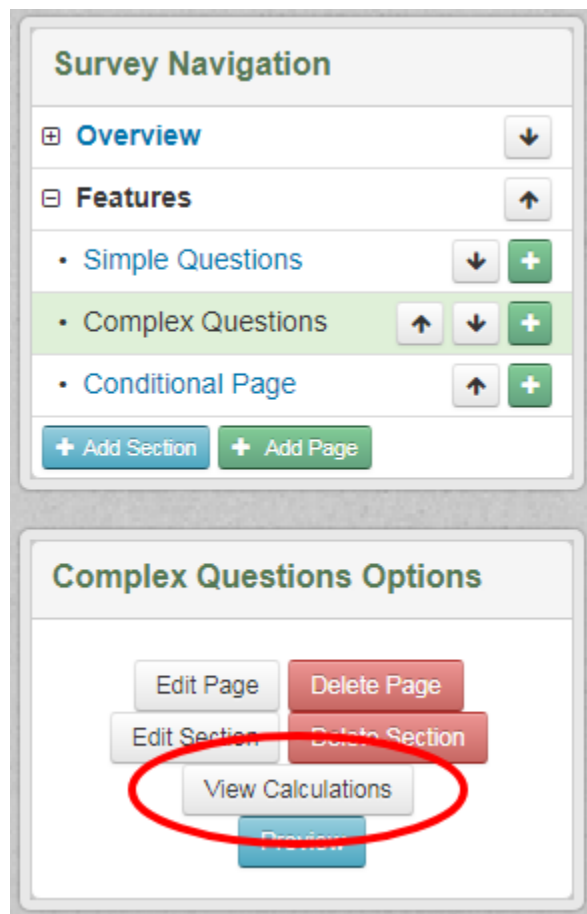
List of Existing Calculations

This will bring you to a listing of all calculations for the current Survey Form where you can Add, Edit, Copy, or Delete a Calculation.

1. The Add Calculation button used to create a new Calculation
2. The name of the existing calculation
3. The description of the existing calculation
4. The Edit Calculation button used to make changes to make changes to the existing calculation
5. The Create a copy of this Calculation button used to create a new calculation based of the existing calculation
6. The Delete Calculation button used to delete the existing calculation
    1. If the calculation is referenced by another calculation or used in a question that calculation or question must be deleted first.

Calculation Creation/Editing

Calcuation Name

1 Name

Example Calc

Enter a name for this calculation.

2 Calculation Type

Question ▼

What type of question the calculation can be used for

3 Description

Example

Enter a description for this calculation

Calculation Min/Max
Settings related to the minimum and maximum values a calculation can return

4 CALCULATION_MIN

This sets the minimum value the calculation can return

5 CALCULATION_MAX

This sets the maximum value the calculation can return

6 Calculation

([Simple Questions.Q2]/[Simple Questions.Q2.C0])+100

1. The Name of the calculation used to reference it (Required)
2. The type of calculation being created. For now Question is the only option.
3. Description of the calculation (Required)
4. The minimum value the calculation can return
5. The maximum value the calculation can return
6. A dynamically updated representation of the calculation.
7. One of the Calculation Items. At least two of these are required to create a calculation
8. Another calculation Item
9. The type of variable being referenced
    1. Question - References a specific question
    2. Column - References a specified column of a table.
        1. If the calculation is displayed in the same table as this variable it will only bring in the current row
        2. If the calculation is displayed in a different table or not in a table at all it will bring in and total the entire column
    3. Static Value - Uses a specified value
10. A dropdown of all numeric or calculation questions on the Survey Form.
    1. Format is: Page Name.QX - Report Title for non-table questions
        1. X = Question Number
    2. Format is: Page Name.QX.RY.CZ for table questions
        1. X = Question Number
        2. Y = Row Number
        3. Z = Column Number
11. Used to remove the calculation item and either the operation (13) before or after the element depending on which option is selecting when conforming the deletion.
12. Removes one level of parenthesis from the calculation item before (7) and after (8) the operation (13)
13. The operation to be used on the previous and subsequent calculation item (7 & 8)
    1. Addition: +
    2. Subtraction: -
    3. Multiplication: *
    4. Division: /
14. Adds one level of parenthesis from the calculation item before (7) and after (8) the operation (13)
15. A dropdown of all numeric columns from tables on the Survey Form
    1. Format is: Page Name.QX.CY
        1. X = Question Number

2. Y = Column Number
16. A defined static value to be used in the calculation

Calculation Question

When creating a question to display the result of the Calculation the desired Calculation is selected from the list of Calculation Names and Descriptions

The selected calculation will be displayed when viewing the calculation from the edit screen