VETsurvey

# MANUAL

# Contents

Section 1

# Introduction

This Manual is intended to provide generic instructions for managing VETsurvey.

You will notice that through-out this guide some text appears in **bold**. The **bold** style indicates the text is a reference to an element appearing on-screen. This will help readily identify steps on-screen when following through a set of instructions. In addition to the bold text, there are numerous screenshots to help keep instructions as simple and easy to follow as possible.

The following topics are addressed in this section:



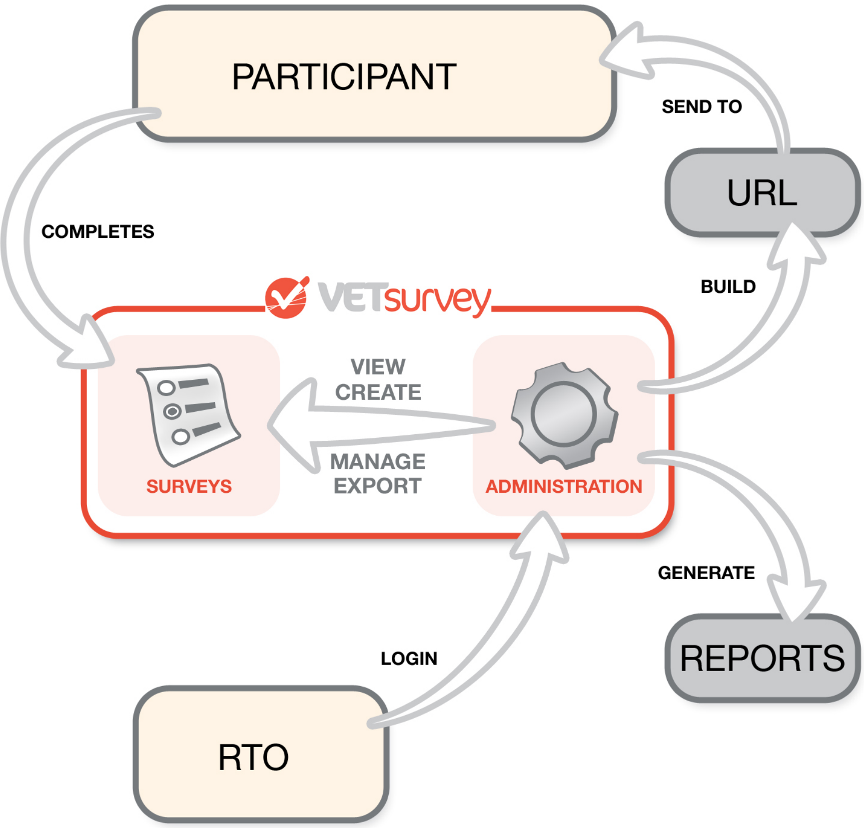
**NOTE:** Screenshots featured through-out this Manual are provided as examples only. All names and survey results are fictional and created for demonstration purposes only.

# Product Overview

VETsurvey is an online survey solution providing reporting and storage for completed surveys. It can be used to assist in identifying strengths and weaknesses in training services. VETsurvey includes templates for AQTF surveys.

The components of VETsurvey are:

- Survey Interface for participants.
- Administration Interface.




# System Requirements

The general requirements for VETsurvey are as follows:

- Internet access; and
- A compatible browser.
  - Internet Explorer 10+
  - Mozilla Firefox 25+

Section 2

# Getting Started

This section covers the basics required to begin using VETsurvey. It is important to go to the Administration interface for VETsurvey and complete the required preparation before directing participants to complete surveys.

The following topics are addressed in this section:

# Login

Navigate to : http://<YourDomain>.vetsurvey.com.au/admin

> **NOTE**: The <YourDomain> should be replaced with the name provided to you by VETtrak Pty Ltd. For example the Admin URL for the VETsurvey demonstration is http://demo.vetsurvey.com.au/admin

A security dialog will open and you will be required to provide your login credentials.

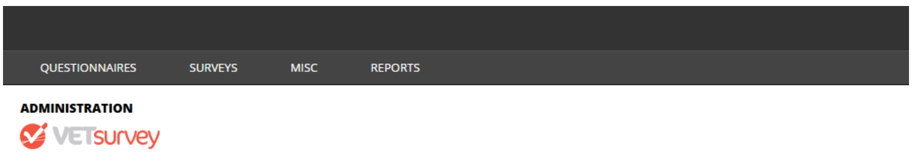
For example using Internet Explorer 11+:


- Enter your '**User name**'.
- Enter your '**Password**'.
- Click the '**OK**' button.

After a successful login, the Questionnaires screen will be displayed.

# Navigation

The primary method of navigation is the menu situated at the top of the screen, with items aligned horizontally.




Positioning your mouse pointer over a menu item will cause it to highlight and, if one exists, display the associated sub-menu. Press the left mouse button to choose the highlighted item.

The menu consists of the following items:

- **Questionnaires** —Displays a list of completed surveys.
- **Surveys** — This sub menu provides options for managing surveys.
- **Misc** —This is a sub-menu for accessing various settings.
- **Reports** — This sub-menu contains reporting options.

# Initial Setup

VETsurvey's Settings must be reviewed and completed to ensure a quality experience for participants. This requires visiting of each of the options available in the 'Misc' sub menu to ensure the appropriate choices are available for building a survey URL and for participants when completing mandatory information for their survey.

In addition to Site Settings, the 'Misc' sub menu provides control over the built-in parameters for surveys. These parameters are:

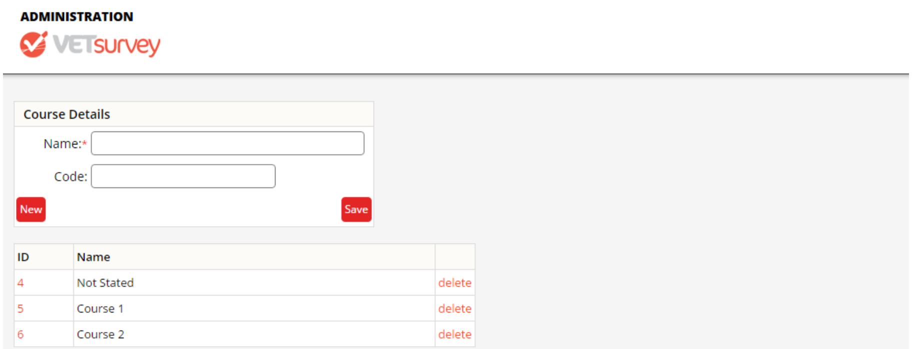
- Courses
- Facilitators
- Locations
- Projects
- Workshops

In each case, these parameters provide selections for building a survey URL, generating reports, and for participants if a built URL is not supplied.

## Courses

Set the courses offered by your organisation to appear for selection on surveys where participants are required to specify a course.

1. Open the Courses screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Courses' menu item.



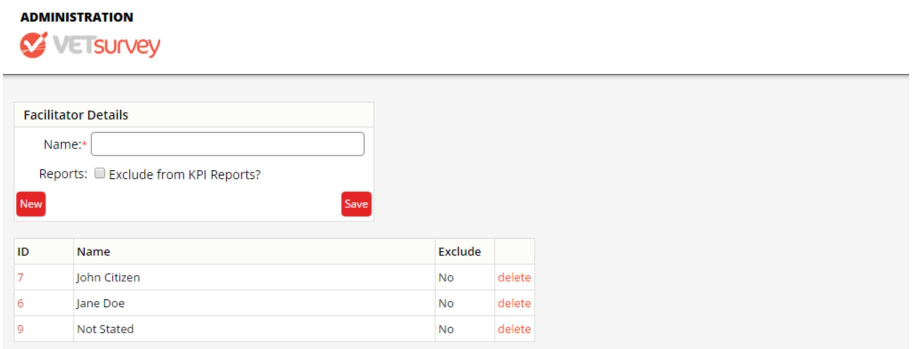
2. Add a course (at least one is required unless your RTO offers only workshops):
   - '**Name**'
     Enter the name of the course.
   - '**Code**'
     Enter the course code.
   - '**Save**' button
     Saves the current entries in the '**Course Details**' section to the Course List.
   - '**New**' button
     Clears the existing entries in the '**Course Details**' section ready for a new course to be entered.

3. Use the Course List to manage existing courses, if required.
   - The **ID** link
     This will pre-fill the '**Course Details**' section allowing the course to be modified.
   - The '**Delete**' link
     This will permanently remove the course.

# Facilitators

Supply a list of facilitators for selection on surveys where participants are required to identify their trainer.

1. Open the Facilitators screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Facilitators' menu item.




2. Add a facilitator (at least one is required):
   - '**Name**'
     Enter the facilitators name.
   - '**Exclude from KPI Reports**' Checkbox
     Enable to prevent the facilitator from being included in reports.
   - '**Save**' button
     Saves the current entries in the '**Facilitator Details**' section to the Facilitator List.

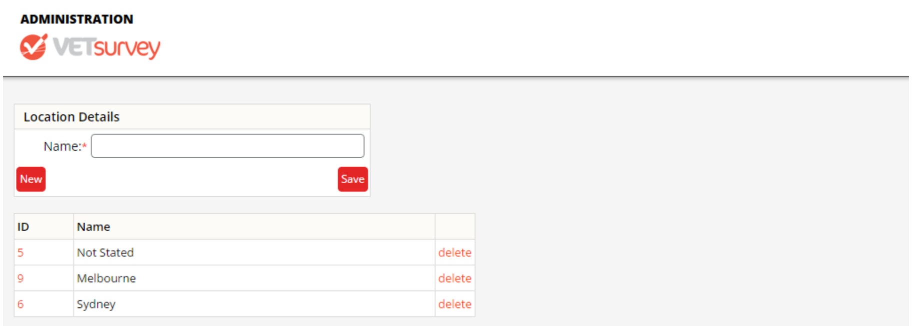
- '**New**' button
  Clears the existing entries in the '**Facilitator Details**' section ready for a new facilitator to be entered.

3. Use the Facilitator List to manage existing facilitators, if required.
   - The **ID** link
     This will pre-fill the '**Facilitator Details**' section allowing the facilitator to be modified.
   - The '**Delete**' link
     This will permanently remove the facilitator.

# Locations

Provide a list of locations where training takes place that is made available to participants where required.

1. Open the Locations screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Locations' menu item.



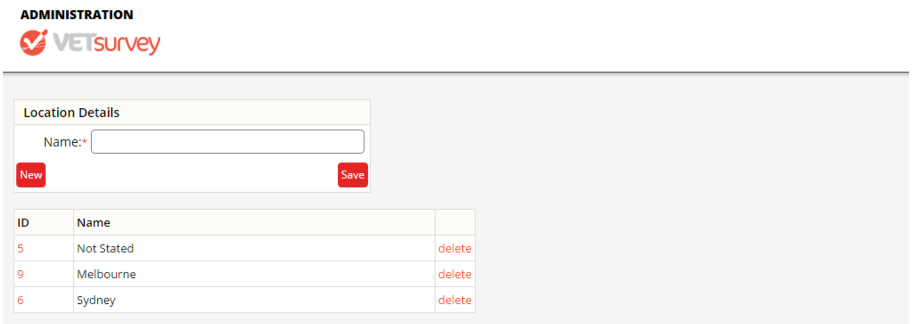

2. Add a location (at least one is required):
   - '**Name**'
     Enter the location name.
   - '**Save**' button
     Saves the current entries in the '**Location Details**' section to the Location List.
   - '**New**' button
     Clears the existing entries in the '**Location Details**' section ready for a new location to be entered.

3. Use the Location List to manage existing locations, if required.
   - The **ID** link
     This will pre-fill the '**Location Details**' section allowing the location to be modified.
   - The '**Delete**' link
     This will permanently remove the location.

# Projects

The Projects menu item provides a list of projects for selection.

1. Open the Projects screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Projects' menu item.



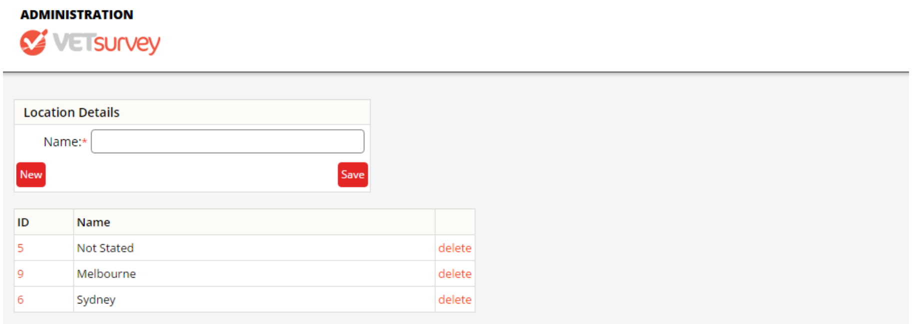

2. Add a project (at least one is required):
   - '**Name**'
     Enter the project name.
   - '**Save**' button
     Saves the current entries in the '**Project Details**' section to the Project List.
   - '**New**' button
     Clears the existing entries in the '**Project Details**' section ready for a new project to be entered.

3. Use the Project List to manage existing locations, if required.
   - The **ID** link
     This will pre-fill the '**Project Details**' section allowing the project to be modified.
   - The '**Delete**' link
     This will permanently remove the project.

# Workshops

The Workshops menu item provides a list of workshops for selection.

1. Open the Workshops screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Workshops' menu item.



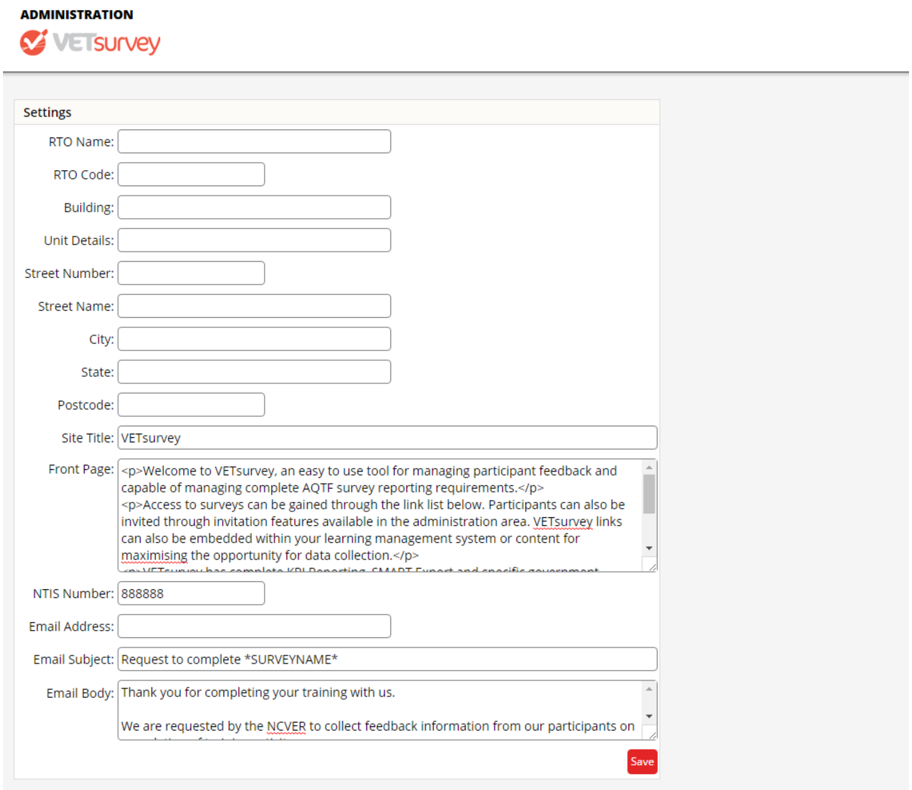

2. Add a workshop (at least one is required unless your RTO only offers Courses.):
   - '**Name**'
     Enter the workshop name.
   - '**Save**' button
     Saves the current entries in the '**Workshop Details**' section to the Workshop List.
   - '**New**' button
     Clears the existing entries in the '**Workshop Details**' section ready for a new workshop to be entered.

3. Use the Workshop List to manage existing workshops, if required.
   - The **ID** link
     This will pre-fill the '**Workshop Details**' section allowing the workshop to be modified.
   - The '**Delete**' link
     This will permanently remove the workshop.

# Site Settings

The Site Settings menu item provides access to general settings for VETsurvey that allow customisation of the product.

1. Open the Site Settings screen
   - Highlight 'Misc' on the Navigation menu to display the sub-menu.
   - Click the 'Site Settings' menu item.




2. Complete each of the settings:
   - '**RTO Name**', '**RTO Code**', and address fields. These will be used for reporting.
   - '**Site Title**'
     Enter the text to be displayed as the site tile included in the header. It is only relevant if the Site Tile branding option has been chosen.
   - '**Front Page**'
     Enter welcome text for the main screen of VETsurvey. HTML code is accepted.
   - '**NTIS Number**'
     This is used in SMART reporting.
   - '**Email Address**'
     From address used for sending email. SPAM rules on your server must not prevent emails being sent to internal users from an internal address hosted on an external server. Test by sending a message to your own email address.
   - '**Email Subject**'
     Subject line used for emails sent via the 'Build URLs' feature. Special Variables are accepted.
   - '**Email Body**'
     Email message used for emails sent via the 'Build URLs' feature. HTML code and special variables are accepted. Must include the *URL* special variable.

3. Click the '**Save**' button.

**SEE ALSO**: The appendices HTML Code on page 44 and Special Variables on page 45.

# Testing

After completing the previous topics, it is recommended that you view VETsurvey from a participant's perspective to confirm the system is working.

## Main Screen

Navigate to : http://<YourDomain>.vetsurvey.com.au/

> **NOTE**: The <YourDomain> should be replaced with the name provided to you by VETtrak Pty Ltd. For example the URL for the VETsurvey demonstration is http://demo.vetsurvey.com.au/

Check the main screen to confirm:

- The Welcome text is displaying as expected.
- The Site Title is accurate (if branding permits its use)
- The generic surveys are displayed.

## Survey Screen

Check the survey screen by clicking one of the surveys.

- Ensure the drop-down menus in the first section are displaying the correct content as entered during Initial Setup on page 8.

Section 3

# Questionnaires

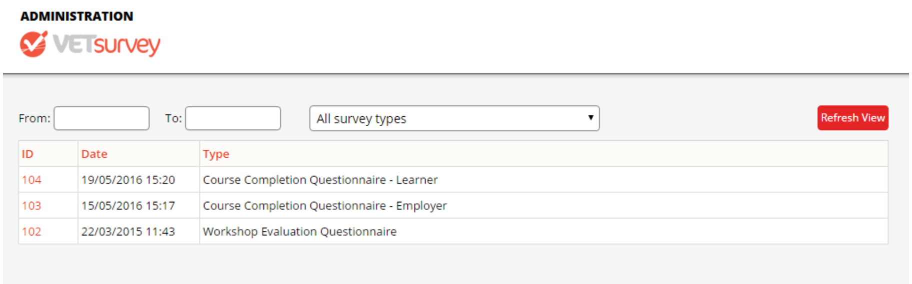
This section covers completed surveys which are referred to as questionnaires. VETsurvey keeps a record of all questionnaires and these are accessible through the Administration interface.

The following topics are addressed in this section:

# List View

The Questionnaires screen is the main screen of VETsurvey Administration. This is the screen shown after a successful login.

The completed surveys are displayed in a list format as shown:



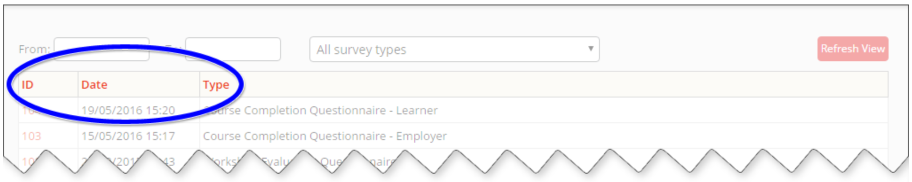

The list can be:

- Sorted.
- Filtered.

Additionally, the listed questionnaires can be viewed in their entirety.

## Sorting

The questionnaire list can be sorted using the column headings:




- Left-click the column heading to sort by that field.
- Click the same column heading to alternate between ascending and descending order.

## Filters

The questionnaire list can be filtered to show only specific records, as follows:

1. Date Range
   Set a date range by clicking the '**From**' field to display the calendar:


   – Navigate through the displayed months using the ◀ and ▶ icons, or alternatively by selecting a month from the drop-down menu provided.
   – Left click a date to select it.

   Repeat the process for the '**To**' field.

> **NOTE**: The 'From' field can be left blank to retrieve all records to a certain date, conversely, the 'To' field can be left blank to retrieve records up to the current date.

2. Survey Type
   Selecting a survey type from the drop-down menu will limit results to questionnaires of that type.

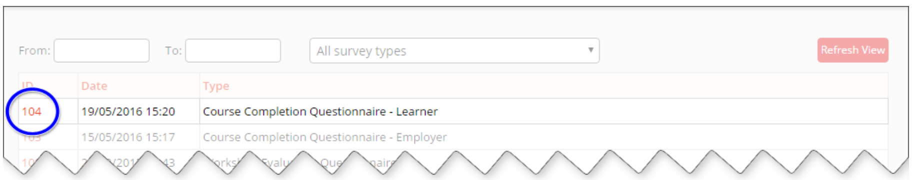
3. Click the '**Refresh View**' button to apply the set filters.

To remove filters:

1. Clear the '**From**' and '**To**' fields by clicking each field in turn and deleting the contents using Delete or Backspace on the keyboard.
2. Select '**All survey types**' from the drop-down menu.
3. Click the '**Refresh View**' button.

# View Details

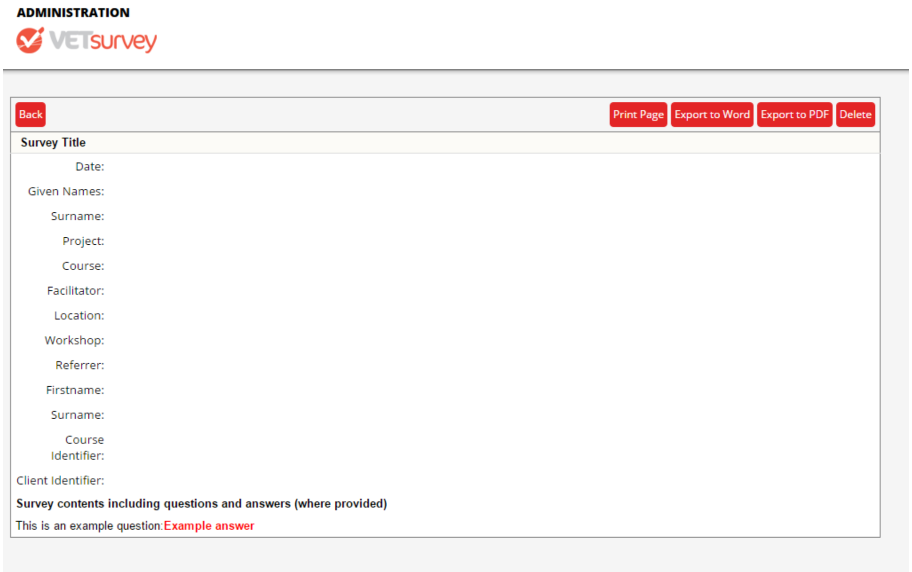
The questions and the responses to each questionnaire in the list can be viewed individually:



- Left-click the survey ID to open the details for that survey.

# Survey Details

The Survey Details screen displays the complete record for a single survey. All data entered by the participant is displayed here, together with the questions posed.




The Survey Details screen also presents buttons with the following functions:

- '**Back**' button — Return to the Questionnaires list.
- '**Print Page**' button — Opens the print dialog.
- '**Export to Word**' button — View or save the survey in Microsoft Word format.
- '**Export to PDF**' button — View and/or save the survey in Adobe PDF format.
- '**Delete**' button — This will permanently delete the displayed survey. This is intended for use with blank surveys and spam.

Section 4

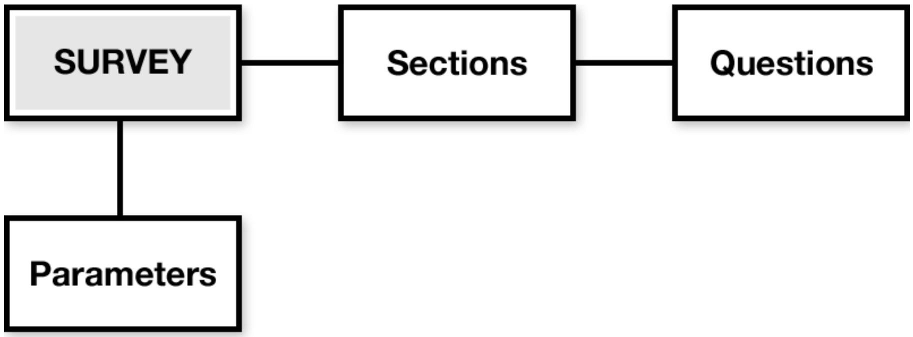
# Managing Surveys

This section covers the basics of creating and managing surveys.

The following topics are addressed in this section:

# Overview

Surveys are divided into small components to simplify their management. Each of the components are linked to form a whole.




It is worth considering the structure of a survey before starting the creation process. Give particular thought to obtaining meaningful results from reporting when deciding on how questions will be grouped into sections and how participants will answer. It may be necessary to adjust your initial thinking to achieve your goals. Additionally, if a survey is being created to replace a paper-based form consider if the method of answering can be replicated and also if a different answering method would be more practical.

To create a fully functional survey, the following steps are required:

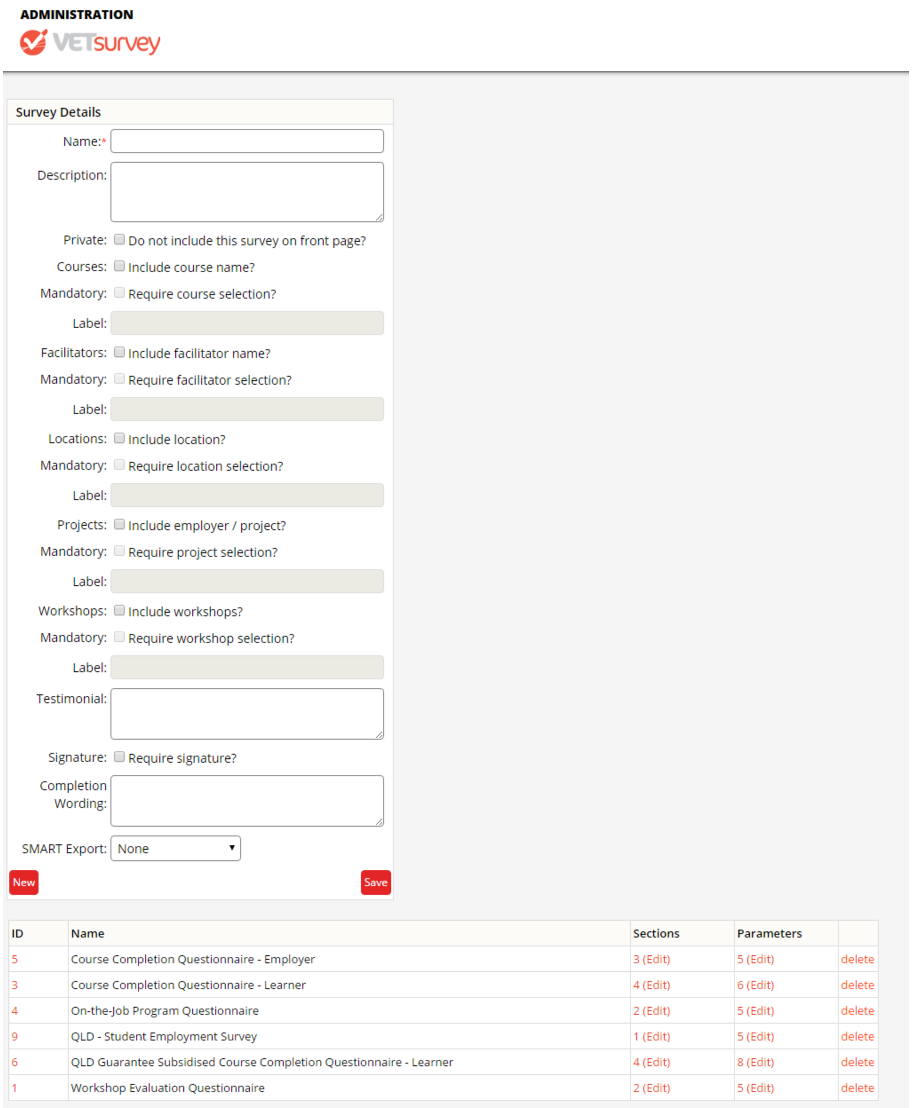
1. Create a new survey.
   This is the container that connects the other components together.
2. Specify parameters, if any.
   These are in addition to the built-in parameters.
3. Create sections (for grouping questions)
   This structures the survey for manageability and improves the appearance for participants.
4. Create questions in each section.
5. Test the survey.

# The Interface

The Edit Surveys screen provides the interface for the creation and management of surveys.

To access the Edit Surveys screen:

- Highlight 'Surveys' on the Navigation menu to display the sub-menu.
- Click the 'Edit Surveys' menu item.




| ID | Name | Sections | Parameters | |
|---|---|---|---|---|
| 5 | Course Completion Questionnaire - Employer | 3 (Edit) | 5 (Edit) | delete |
| 3 | Course Completion Questionnaire - Learner | 4 (Edit) | 6 (Edit) | delete |
| 4 | On-the-Job Program Questionnaire | 2 (Edit) | 5 (Edit) | delete |
| 9 | QLD - Student Employment Survey | 1 (Edit) | 5 (Edit) | delete |
| 6 | QLD Guarantee Subsidised Course Completion Questionnaire - Learner | 4 (Edit) | 8 (Edit) | delete |
| 1 | Workshop Evaluation Questionnaire | 2 (Edit) | 5 (Edit) | delete |

The Edit Surveys screen has two key elements:

- '**Survey Details**' section — for creating a new survey or modifying the details of an existing survey.
- The Survey List table — for managing existing surveys.

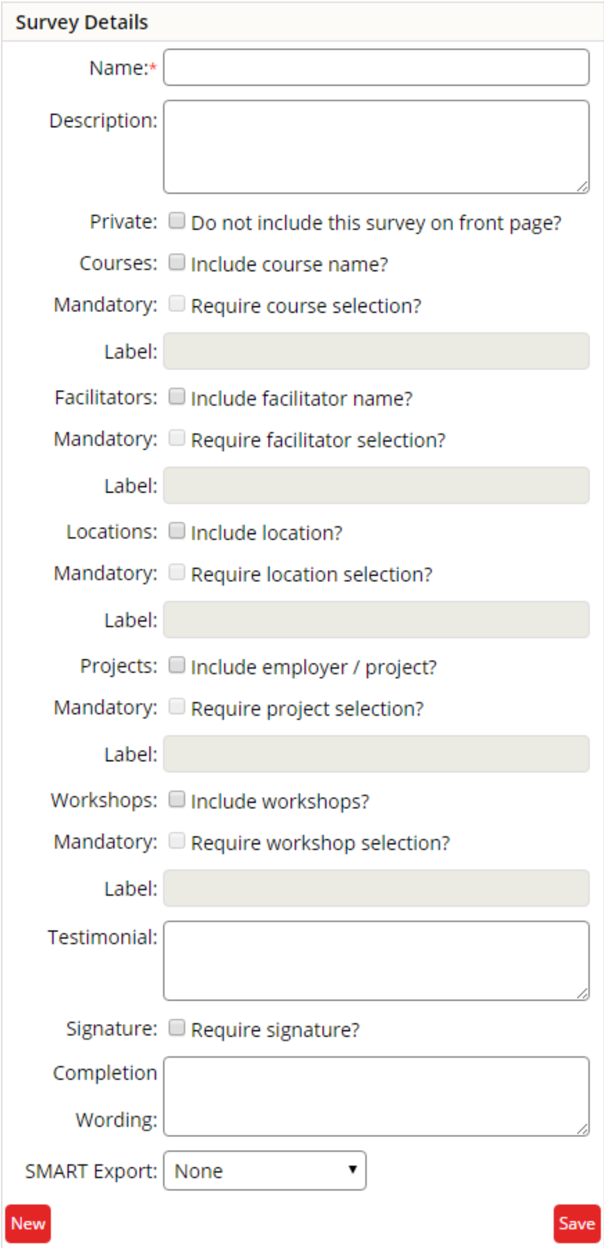
# Survey Details

The Survey Details section contains settings used by all surveys. A name for the survey is the only required setting.

- The '**New**' button —clears all fields ready for a new survey to be created.
- The '**Save**' button — creates or updates a survey with the current settings.

## New Survey

The **Survey Details** section of the Edit Surveys screen is used to create new surveys:




- Enter a '**Name**' for the survey.
- If desired, include a '**Description**' for the survey. This field will accept both text and html.
- If the survey should remain private, enable the '**Do not include this survey on the front page**' checkbox.
  This is useful to enable until testing is complete, particularly if VETsurvey is available to participants through your organisation's website.
- Enable the built-in parameters, as required:
  - courses
  - facilitator
  - locations

   - projects
   - workshops

  Enter a label for each or leave the field blank to use the default.
- To include a testimonial disclaimer, supply '**Testimonial**' text.
- Enable the '**Require signature**' checkbox to obtain the particpants signature as acceptance of the testimonial disclaimer. This field will have no effect if '*Testimonial*' is left blank.
- Alter the default text displayed to participants on completing the survey by providing '**Completion Wording**'.
- Choose a '**SMART Export**' option, if required.
- Click the '**Save**' button.

The newly created survey will now appear in the Survey List, where parameters and sections can be added.

# Survey List

This is the management tool for surveys.

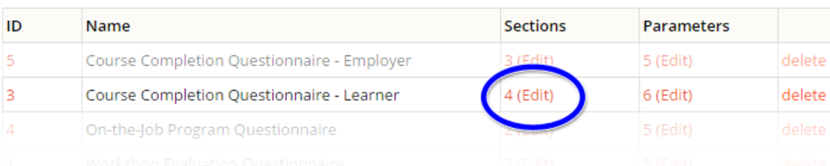
## Edit Survey Details

| ID | Name | Sections | Parameters | |
|---|---|---|---|---|
| 5 | Course Completion Questionnaire - Employer | 3 (Edit) | 5 (Edit) | delete |
| 3 | Course Completion Questionnaire - Learner | 4 (Edit) | 6 (Edit) | delete |
| 4 | On-the-Job Program Questionnaire | 2 (Edit) | 5 (Edit) | delete |
| 1 | Workshop Evaluation Questionnaire | 2 (Edit) | 5 (Edit) | delete |

- Click the **ID** link that corresponds to the survey to be edited.

The Survey Details section will be pre-filled with the entries for the survey.

## Edit Survey Sections

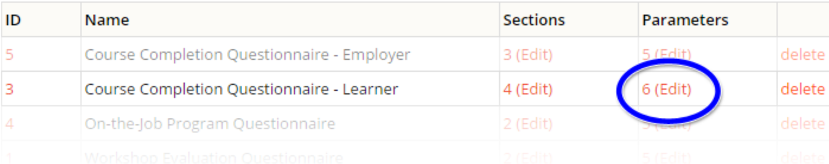


| ID | Name | Sections | Parameters | |
|---|---|---|---|---|
| 5 | Course Completion Questionnaire - Employer | 3 (Edit) | 5 (Edit) | delete |
| 3 | Course Completion Questionnaire - Learner | 4 (Edit) | 6 (Edit) | delete |
| 4 | On-the-Job Program Questionnaire | 2 (Edit) | 5 (Edit) | delete |
| 1 | Workshop Evaluation Questionnaire | 2 (Edit) | 5 (Edit) | delete |

- Click the **Edit** link in the Sections column that corresponds to the survey.

The screen for populating the survey will be displayed.

## Edit Survey Parameters




- Click the **Edit** link in the Parameters column that corresponds to the survey.

The Survey Parameters screen will open.

## Delete Survey

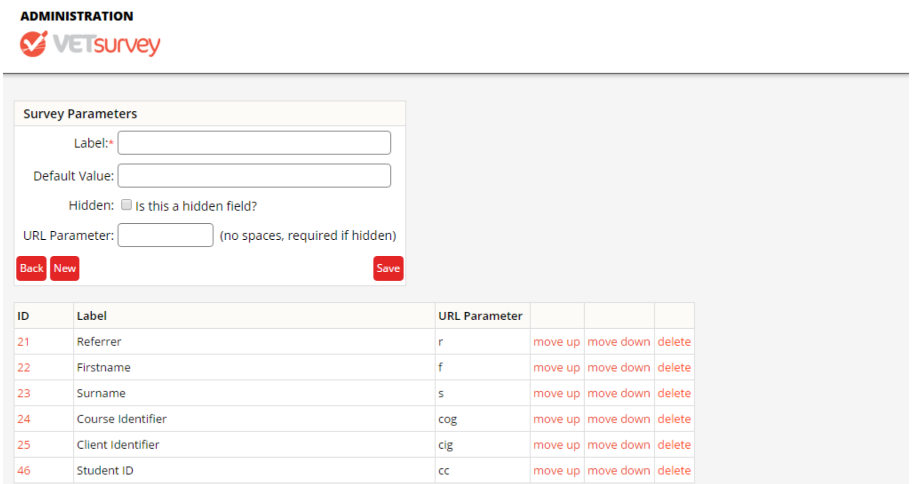

- Click the '**delete**' link that corresponds to the survey.

This will remove the survey and all of its components.

# Survey Parameters

These are custom created fields appearing in the first section of the survey with the built-in parameters. These parameters cannot be made mandatory.

The Edit Parameters screen:




The key features are:

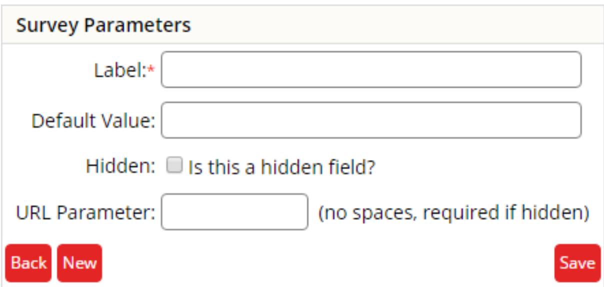
- The Survey Parameters section for creating and modifying survey parameters.
  - The '**Back**' button returns to the Edit Surveys screen.
  - The '**New**' button will clear any existing entries in preparation for a new paramater.
  - The '**Save**' button creates or modifies the parameter in the Survey Parameters List with the current entries.
- The Survey Parameters List table for managing existing parameters.
  - The **ID** link prefills the Survey Parameters section so its corresponding parameter can be modified.
  - The '**move up**' and '**move down**' links will change the list position of the corresponding parameter if there are multiple parameters.
  - The '**delete**' link will permanently remove the corresponding parameter.

**NOTE**: The Survey Parameters List is shown only if at least one parameter exists.

**SEE ALSO**: Custom URLs on page 34 regarding using parameters in URLs.

## Creating a New Parameter

To create a new parameter, from the Survey Parameters section:

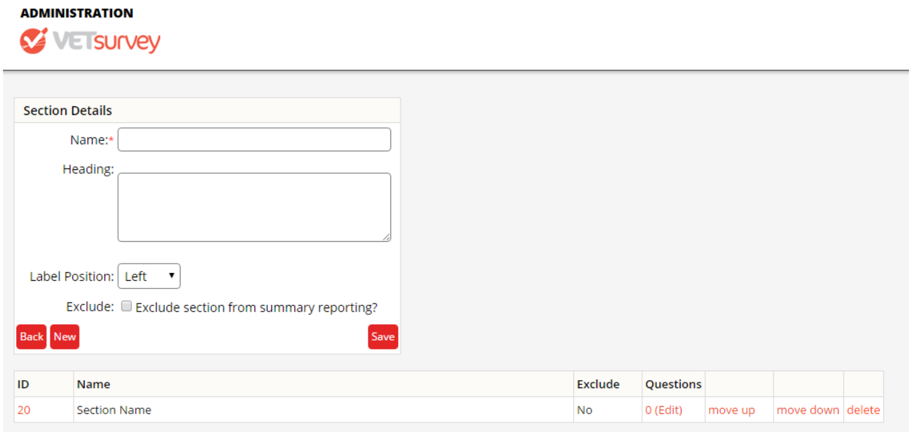



- Enter a '**Label**' for the parameter.
- Supply a '**Default Value**', if desired.
- Enable the **Hidden** checkbox, if required.
  This will prevent the field from displaying to participants.
- Specify a '**URL Parameter**', if required.
  This allows a value for the parameter to be passed via URL.
- Click the '**Save**' button.

# Survey Sections

Sections are for grouping questions. Properly structuring sections will improve the manageability of the survey and assist with the presentation of the survey to participants.

The Edit Sections screen:



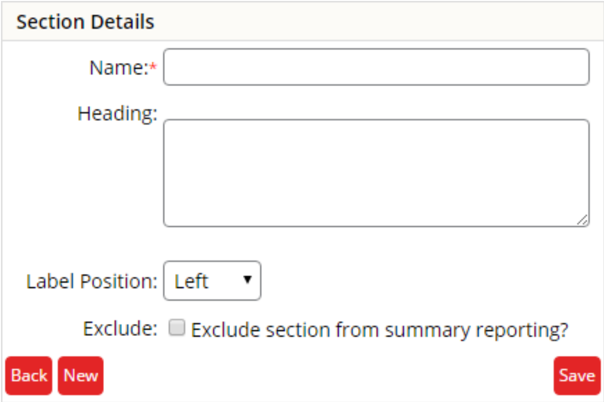

The key features are:

- The Section Details section for creating and modifying survey sections.
  - The '**Back**' button returns to the Edit Surveys screen.
  - The '**New**' button will clear any existing entries in preparation for a new section.
  - The '**Save**' button creates or modifies the section in the Section List with the current entries.
- The Section List for managing existing sections.
  - The **ID** link prefills **Section Details** to allow the corresponding existing section to be modified.
  - The **(Edit)** link in the **Questions** column is for managing the questions that will appear in the section. A survey requires at least one section with at least one question to be valid.
  - The '**move up**' and '**move down**' links will change the list position of the corresponding section if there are multiple sections.
  - The '**delete**' link will permanently remove the corresponding section and associated questions.

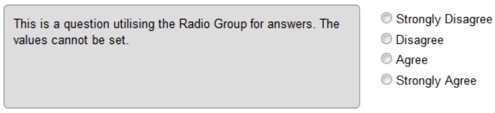
**NOTE**: The Section List is shown once at least one section exists.

## Creating a New Section

To create a new section, from the Section Details section:




- Enter a '**Name**' for the section.
  This will help identify the section should management be required in the future.
- Enter a '**Heading**', if desired.
- Choose the '**Label Position**'.
  - '**Left**' will place the questions to the left of where the participant answers, as shown:



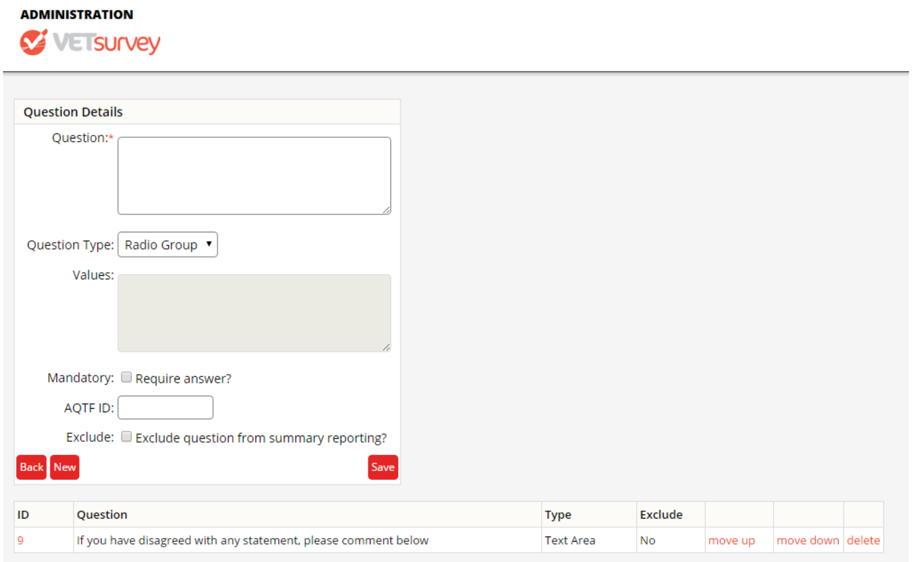

  - '**Above**' will place the questions on a separate line above where the participant answers, as shown:


- Exclude.
- Click the '**Save**' button.

# Survey Questions

Questions are the fundamental components of the survey. They define the survey's value to the organisation as a tool.

The Edit Questions screen:




The key features are:

- The Question Details section for creating and modifying survey parameters.
  - The '**Back**' button returns to the Edit Sections screen.
  - The '**New**' button will clear any existing entries in preparation for a new question.
  - The '**Save**' button creates or modifies the question in the Question List with the current entries.
- The Section List for managing existing sections.
  - The **ID** link prefills **Question Details** to allow the corresponding existing question to be modified.
  - The '**move up**' and '**move down**' links will change the list position of the corresponding question if there are multiple questions.
  - The '**delete**' link will permanently remove the corresponding section and associated questions.

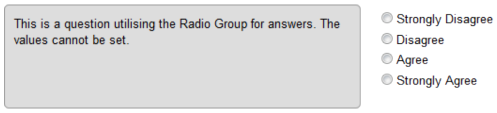
**NOTE**: The Section List is shown once at least one section exists.

# Question Types

These control the method by which a participant answers a question.

## Radio Group

This question type allows a question or a statement to be posed for which the participant can then indicate their level of agreement.



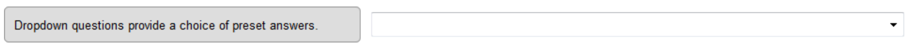

The values available for answers (Strongly Disagree, Disagree, Agree, Strongly Agree) are preset and cannot be altered.

Suitable for:

- Various AQTF compliant survey questions.
- Obtaining report results that can be easily interpreted to indicate various strengths and weaknesses in the organisation.

## Drop Down

The Drop Down question type utilises a drop-down menu for answers.



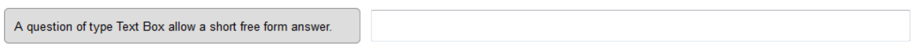

The values available for answers are set on a per-question basis. The drop-down menu is always displayed to the participant blank, which is recorded as Not answered in cases where the participant does not make a selection from the list.

Suitable for:

- Multiple choice questions.
- Obtaining report results that can be easily interpreted to indicate various strengths and weaknesses in the organisation.

## Text Box

This question type allows for an answer to be provided in the participants own words.



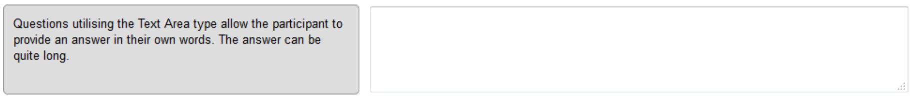

If this question type is included in reporting, each answer is recorded on a separate line even where participants supply the same answer.

Suitable for:

- Answers requiring only a few words or a short sentence.
- Answers requiring freedom of expression.

### Text Area

This question type allows for an answer to be provided in the participants own words.

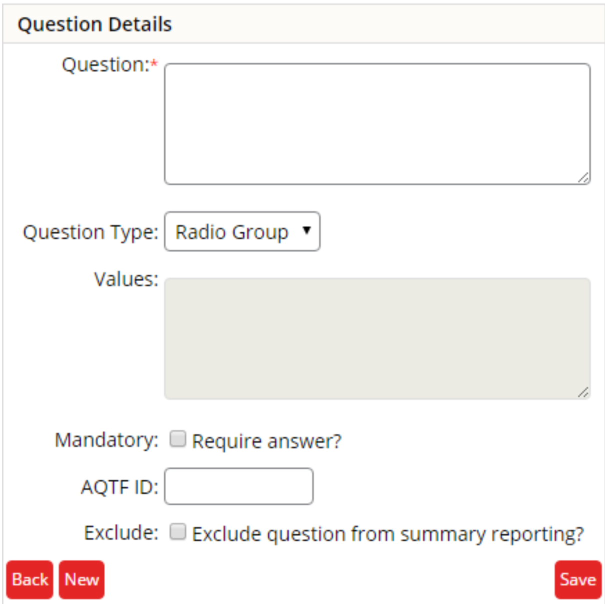



Suitable for:

- Answers requiring freedom of expression.
- Long answers.

## Creating a New Question

To create a new question, from the Question Details section:



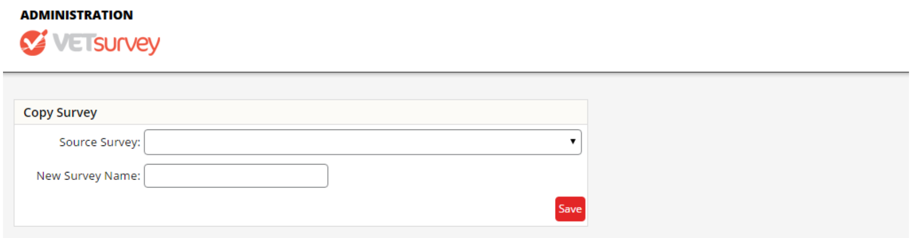

- Enter the '**Question**'to be asked of the participant.
- Choose the '**Question Type**'.
- Enter '**Values**' if the **Drop Down** question type is selected.
  These should be entered in the format of:
  0=Value1
  1=Value2
  2=Value3
- The question can be set as mandatory by enabling the '**Require answer**' checkbox. This will force the participant to answer the question before being able to submit the survey.
- The '**AQTF ID**' can be specified if applicable.
- Answers to the questions can be omitted from reports by enabling the '**Exclude question**

**from summary reporting**' checkbox.
- Click the '**Save**' button.

# Duplicating an Existing Survey

The Duplicate Survey feature allows a copy of an existing survey to be created quickly.

- Highlight 'Surveys' on the Navigation menu to display the sub-menu.
- Click the 'Duplicate Survey' menu item.




- Select the survey to copy from the **Source Survey** drop-down list
- Specify a **New Survey Name**.
- Click the **Save** button.

The new survey can be modified via Edit Surveys, or used immediately.

Section 5

# Survey URLs

This section covers the creation and distribution of links.

The following topics are addressed in this section:

# Website

You can add a link to your existing website to take participants to VETsurvey. This method requires participants to complete the mandatory data themselves.

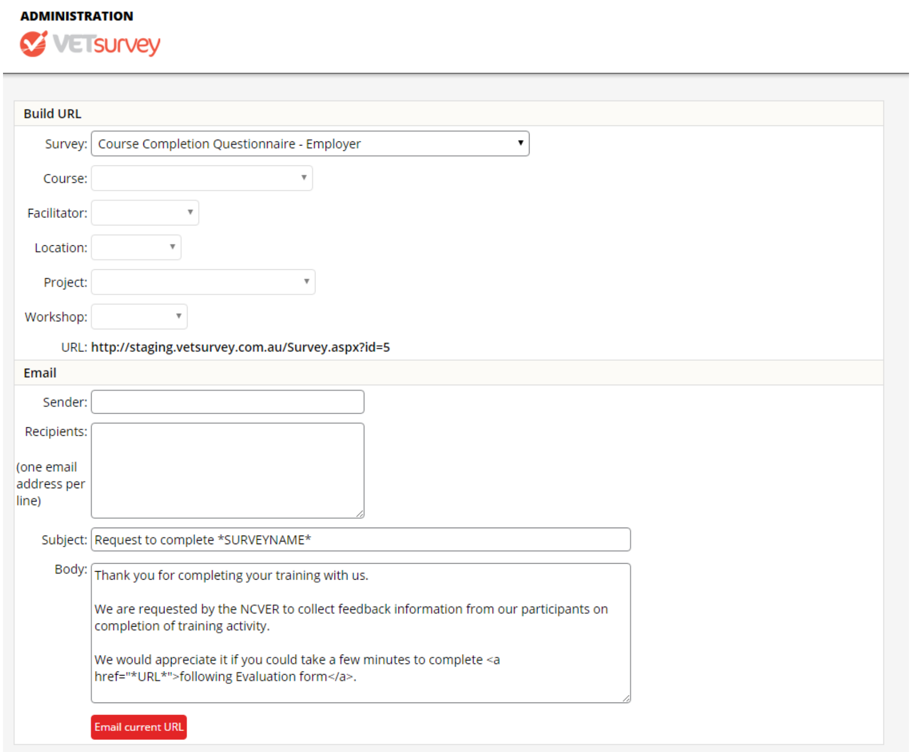
The required link is: http://<YourDomain>.vetsurvey.com.au/

> **NOTE**: The <YourDomain> should be replaced with the name provided to you by VETtrak Pty Ltd. For example the URL for the VETsurvey demonstration is http://demo.vetsurvey.com.au/

# Building Survey URLs

The Build URLs feature combines practicality and convenience.

- Highlight 'Surveys' on the Navigation menu to display the sub-menu.
- Click the 'Build URLs' menu item.




There are two key elements:

- '**Build URL**' section — for building or creating the URL for participants.
- '**Email**' section —for distributing the URL to participants.

## Build URL

This section identifies the survey type and allows for each of the built-in parameters to be pre-set so the participant does not need to be concerned with those details.

- Select the survey
- course
- facilitator
- location
- project
- workshop

The URL is the resulting link required to pre-populate the information for a participant.

## Email

- Enter the email addresses of the people to receive the URL for the survey.
- Adjust the Subject line for the email if required.
- Adjust the Body of the message if required.
- Click the '**Email current URL**' button.

> **NOTE**: The email defaults can be set via Site Settings in the Misc sub-menu.

# Custom URLs

You can create your own custom URL or manually add to a built URL using querystring parameters to utilise a survey's parameters.

Parameters are added to the end of a link to pre-fill survey fields. The first parameter must be preceded by a question mark (?) and all subsequent parameters with an ampersand (&). In addition, the base URL and the "id" parameter, to identify the survey, are required for all survey URLs.

For Example:

The following URL would display the survey with the ID 1.
http://<YourDomain>.vetsurvey.com.au/Survey.aspx?id=1

**NOTE**: The <YourDomain> should be replaced with the name provided to you by VETtrak Pty Ltd. For example the URL for the VETsurvey demonstration is http://demo.vetsurvey.com.au/

The following are built-in parameters:

| Parameter | Description | Location for obtaining valid IDs |
|---|---|---|
| id | Survey ID | Surveys > Edit Surveys |
| cID | Course ID | Misc> Courses |
| fID | Facilitator ID | Misc> Facilitators |
| lID | Location ID | Misc> Locations |
| pID | Project ID | Misc> Projects |
| wID | Workshop ID | Misc> Workshops |

**NOTE**: The Build URL feature is the best way to include built-in parameters in a URL. The URL that is generated can then be copied and further customised as required.

In addition to built-in parameters, surveys can have custom parameters. Any Survey Parameter with a URL Parameter set can be used in a URL just like the built-in parameters, although the former cannot be generated with the Build URL feature.

The Survey Parameters List displays the custom parameters. It is accessible by choosing Surveys > Edit Surveys and then choosing the Edit link for a survey in the Survey List.

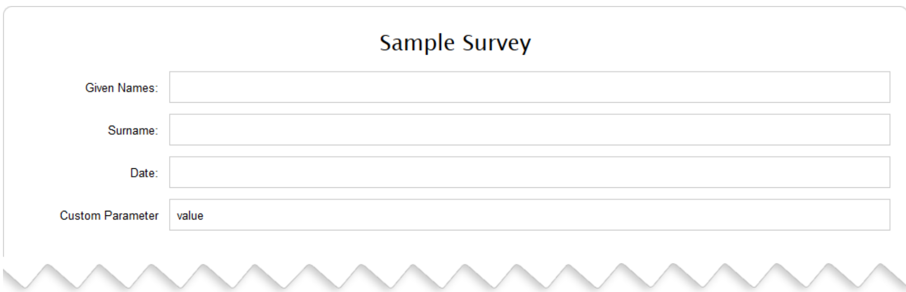
For Example:

| ID | Label | URL Parameter | | | |
|---|---|---|---|---|---|
| 01 | Custom Parameter | newparam | move up | move down | delete |

The sample Survey Parameters List, shown above, indicates the querystring parameter '**newparam**' can be used to pass a value for the Custom Parameter field in the survey.

This could be achieved with the following URL:
http://<YourDomain>.vetsurvey.com.au/Survey.aspx?id=1&newparam=value

Visiting the URL would produce something like the sample screenshot below:



**SEE ALSO** : The appendix titled FinPa Integration on page 54 regarding recognised custom parameters for use with FinPa.

Section 6

# Reporting

VETsurvey offers reporting features.

The following topics are addressed in this section:

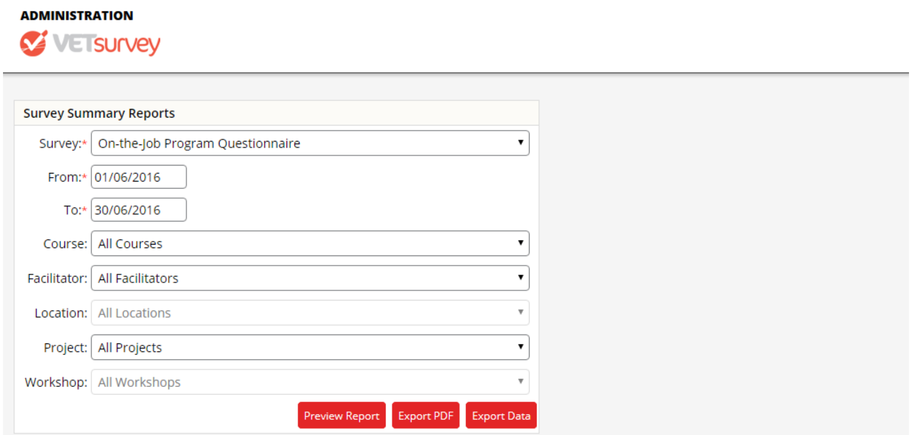
# Survey Reports

Generate reports based on a results from a specific survey type.

To access the Survey Reports feature:

- Highlight 'Reports' on the Navigation menu to display the sub-menu.
- Click the 'Survey Reports' menu item.

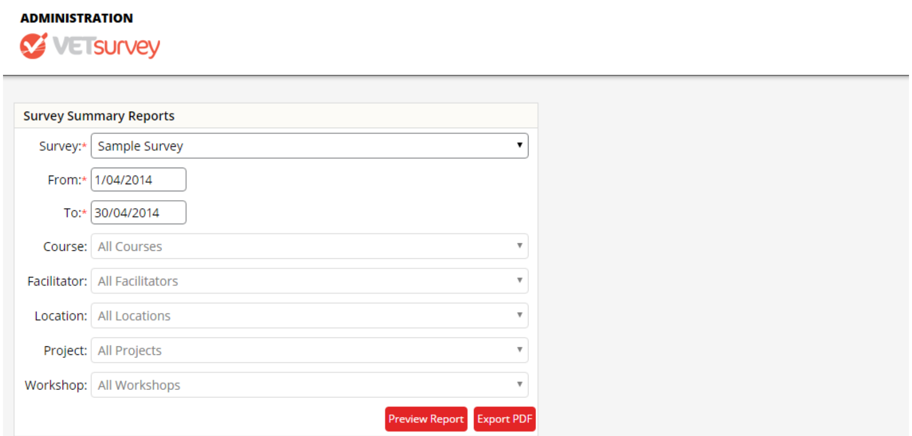
The Survey Reports screen:



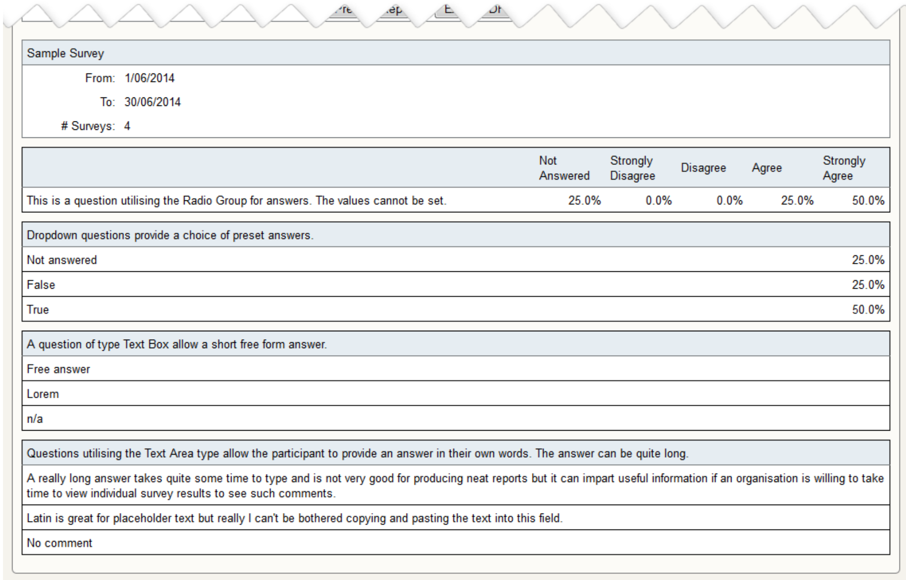

Key features:

- '**Preview Report**' button — view the report results on-screen.
- '**Export PDF**' button — view and/or save the report in Adobe PDF format.
- '**Export Data**' button — view and/or save the report in Microsoft Excel (xlsx) format.

The Survey Summary Report settings depicted in the following screenshot produce the results based on the Sample survey:



- Preview Report results:



Sample Survey
From: 1/06/2014
To: 30/06/2014
# Surveys: 4

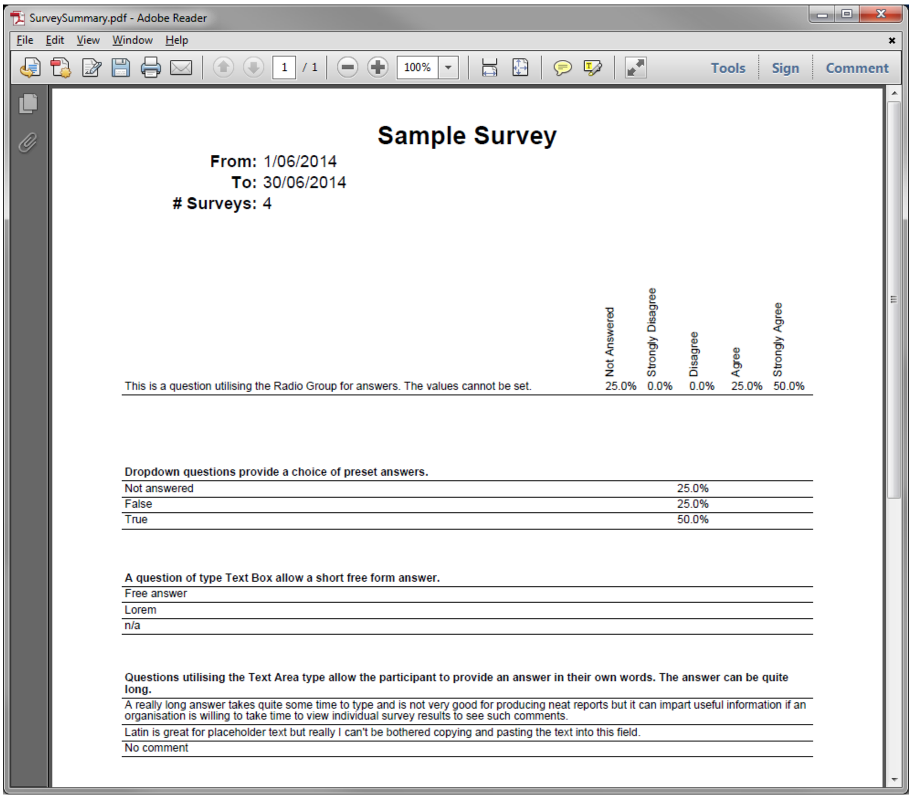
| | Not Answered | Strongly Disagree | Disagree | Agree | Strongly Agree |
|---|---|---|---|---|---|
| This is a question utilising the Radio Group for answers. The values cannot be set. | 25.0% | 0.0% | 0.0% | 25.0% | 50.0% |

| Dropdown questions provide a choice of preset answers. | |
|---|---|
| Not answered | 25.0% |
| False | 25.0% |
| True | 50.0% |

| A question of type Text Box allow a short free form answer. |
|---|
| Free answer |
| Lorem |
| n/a |

| Questions utilising the Text Area type allow the participant to provide an answer in their own words. The answer can be quite long. |
|---|
| A really long answer takes quite some time to type and is not very good for producing neat reports but it can impart useful information if an organisation is willing to take time to view individual survey results to see such comments. |
| Latin is great for placeholder text but really I can't be bothered copying and pasting the text into this field. |
| No comment |

- PDF result:




**Sample Survey**
**From:** 1/06/2014
**To:** 30/06/2014
**# Surveys:** 4

| | Not Answered | Strongly Disagree | Disagree | Agree | Strongly Agree |
|---|---|---|---|---|---|
| This is a question utilising the Radio Group for answers. The values cannot be set. | 25.0% | 0.0% | 0.0% | 25.0% | 50.0% |

| **Dropdown questions provide a choice of preset answers.** | |
|---|---|
| Not answered | 25.0% |
| False | 25.0% |
| True | 50.0% |

| **A question of type Text Box allow a short free form answer.** |
|---|
| Free answer |
| Lorem |
| n/a |

| **Questions utilising the Text Area type allow the participant to provide an answer in their own words. The answer can be quite long.** |
|---|
| A really long answer takes quite some time to type and is not very good for producing neat reports but it can impart useful information if an organisation is willing to take time to view individual survey results to see such comments. |
| Latin is great for placeholder text but really I can't be bothered copying and pasting the text into this field. |
| No comment |

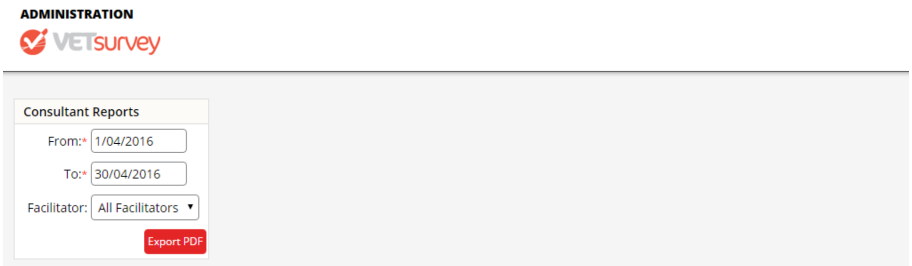
# Facilitator Reports

These reports are based on one or more facilitators across all survey results and may assist with Key Performance Indicators (KPIs).

To access the Facilitator Reports feature:

- Highlight 'Reports' on the Navigation menu to display the sub-menu.
- Click the 'Facilitator Reports' menu item.

The Facilitator Reports screen:




Key Features:

- '**Export PDF**' button —view and/or save the report in Adobe PDF format.

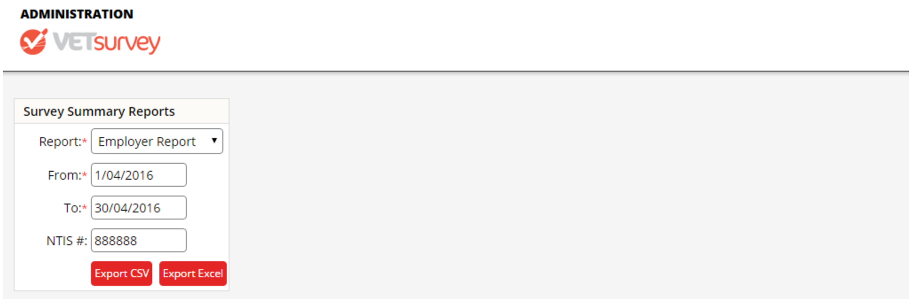
# Export Smart

Produce files able to be imported into SMART software.

To access the Export Smart feature:

- Highlight 'Reports' on the Navigation menu to display the sub-menu.
- Click the 'Export Smart' menu item.

The Export Smart screen:




Key features:

- '**Export CSV**' button — View and/or save the results in text format using comma separated values.
- '**Export Excel**' button — View and/or save the results in Microsoft Excel format.

# SMART Summary

To access the SMART Summary feature:

- Highlight 'Reports' on the Navigation menu to display the sub-menu.
- Click the 'Smart Summary' menu item.

The SMART Summary screen:


Key features:

- '**Export**' button — Generates an Adobe PDF to view/save.

Section 7

# Additional Support

For assistance with VETsurvey outside the scope of this manual, you may contact VETtrak Pty Ltd using any of the following methods:

- Telephone: 1800 838 872
- Email: support@vettrak.com.au
- Website: http://www.vettrak.com.au/

Section 8

# Appendices

This section contains additional information relating to VETsurvey that is unnecessary for day-to-day operations, but may prove useful on occassion.

The following topics are addressed in this section:

# Appendix 1: HTML Code

VETsurvey allows some settings to be customised using HTML code. In some instances HTML code will be required to obtain the intended appearance for viewing.

The following form a very limited selection of basic HTML tags that can be used to apply simple formatting to text:

- **<h1></h1>** through to **<h6></h6>**
  Heading formatting will be applied to text contained within these elements. H1, 'heading 1', is the largest heading and H6, 'Heading 6', is the smallest.
  For example: <h1>Your Heading Here</h1>
- **<p></p>**
  Paragraph text. Applies standard paragraph formatting.
  For example: <p>This will be a paragraph</p><p>This is will be a new paragraph.</p>
- **<b></b>** or **<strong></strong>**
  Bold formatting will be applied to text contained within these elements.
  For example: <p>This will be a paragraph with the word <b>bold</b> in bold text.</p>
- **<em></em>**
  Italic formatting will be applied to text contained within these elements.
  For example: <p>This will be a paragraph with the word <em>emphasis</em> in italics.</p>
- **<br>**
  Inserts a line break.
  For example: <p>This paragraph's next sentence will be on a new line.<br>This is the new line.</p>
- **<a href=""></a>**
  Inserts a hyperlink.
  For Example: <a href="http://www.vettrak.com.au/">VETtrak Website</a>
- **<img src="">**
  Inserts an image.
  For example: <img src="http://www.vetsurvey.com.au/img/logo.png">

It is possible to type code directly into fields, particularly when using the tags listed above, but an easier method for producing a customised result is to copy the existing text/code from the corresponding System Default and paste it into a WYSIWYG HTML Editor, where the text can be customised without needing to know any HTML code. View the source code in the editor and then copy only the code contained within the <body> and </body> HTML tags into the appropriate VETsurvey Administration field and save.

> **DID YOU KNOW?** WYSIWIG (What-You-See-Is-What-You-Get) HTML editor, such as Trellian WebPage or KompoZer are free. Additionally, free HTML tutorials can be found online, such as those at w3schools.

# Appendix 2: Special Variables

VETsurvey stores some commonly used text in special variables for convenience. The use of those variables in customised HTML code or automated email notifications allows changes to be made to Settings such as phone number and have those changes carry through without needing to re-edit code.

Enter the special variable into your code like a place holder and it will be replaced with the associated text when the HTML is generated.

The Email Subject and Email Body Sections can contain the following special variables:

- *URL*
- *SURVEYNAME*

# Appendix 3: Sending surveys from VETtrak

For those that use VETtrak student management system, it is recommended VETtrak be used to send out survey emails as there are a number of advantages, including:

- The ability to keep a record of sent messages.
- Merging fields from your VETtrak database.
- Improved look and feel for messages.

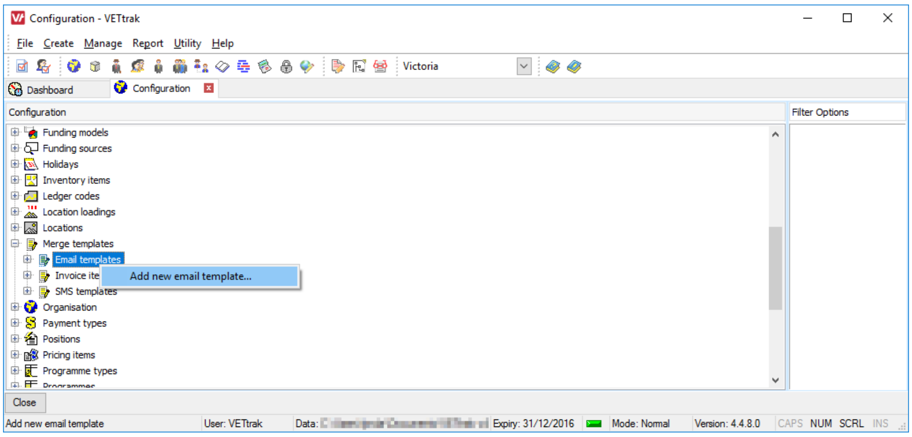
To facilitate this process, a mail merge template should be created for surveys.

> The following instructions are best suited to RTOs utilising occurrences. You may need to adapt the process if this is not the case for your RTO.

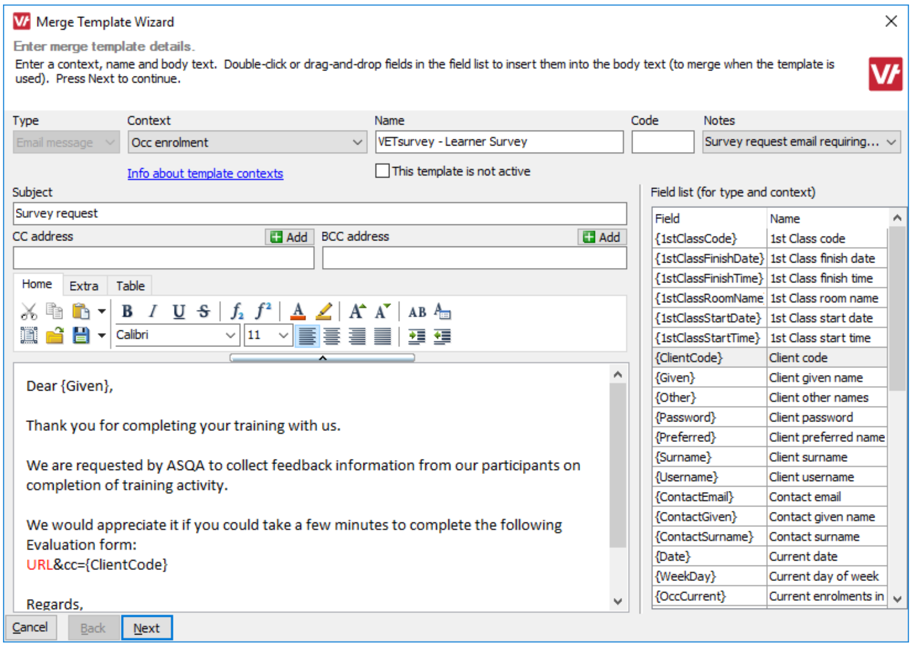
### Creating a VETtrak mail merge template

The template only needs to be created once and can then be used for sending out any survey request.

In VETtrak, choose *Manage* > *Configuration*, or click the icon on the toolbar to open the Configuration Manager.




- Scroll down to find **Merge templates** and click ⊞ to expand it.
- Right-click **Email templates** and choose **Add new email template**.



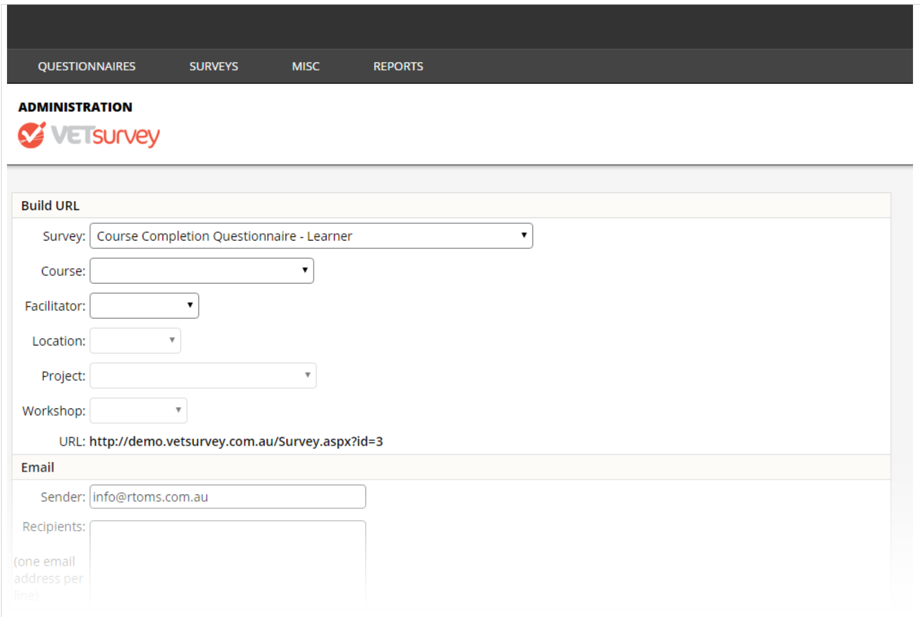

- Select a **Context** to which the template applies. For example *Occ enrolments*.
- Enter a **Name** for the template. A descriptive name that identifies the survey type will be important if you need to use multiple survey templates and this would also be useful for generating VETtrak reports.
- Optionally, enter **Notes** to explain the purpose of the template and/or provide instructions for use.
- Enter a **Subject** for the outgoing messages.
- Include a **CC address** and/or a **BCC address**, if applicable.
- Enter the message text for the template. Include placeholders from the field list where applicable, such as the client's given name.
  - The example text in the screenshot includes a simple text placeholder for the URL to remind users to add the URL and for easy pasting.
  - The example text depicts a hidden parameter (cc) supported by VETsurvey to be added to the end of the URL when it is pasted in later.
  - Hidden parameters can be added to VETsurvey URLs in the format of &parametername=value. In the example shown, we are adding Student ID and the value will be determined by the VETtrak client code.
- Click **Next** and **Finish**.

**NOTE**: If you do not collect course or facilitator information, or are willing to allow the participant to complete this information themselves, you can copy and paste the VETsurvey URL directly into the Merge Template (replacing the URL placeholder depicted in the screenshot).

See Also: Survey Parameters on page 24 regarding custom parameters for surveys.

### Preparing to send out a survey request

In VETsurvey Admin, choose *Surveys* > *Build URLS* from the menu.



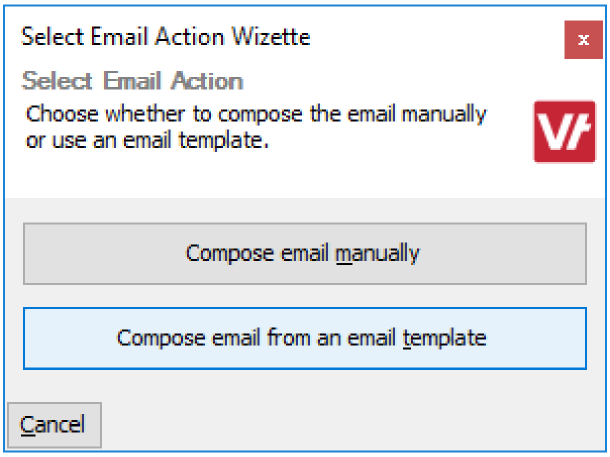

- Select the **Survey**.
- Choose the **Course** the group of students participated in.
- Select the **Facilitator** of the course.
- Copy the **URL** provided, it will have updated based on your previous selections.

> **NOTE**: If you do not collect course or facilitator information, or are willing to allow the participant to complete this information themselves, you can copy and paste the VETsurvey URL directly into the Merge Template. It would then only need to be adjusted if you move to a different survey at the end of each reporting year.

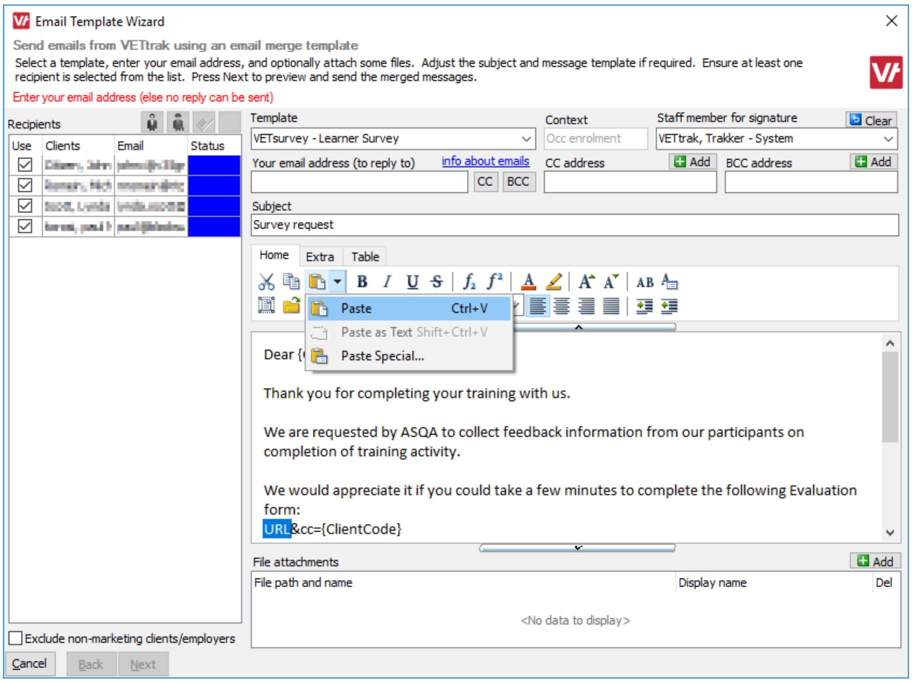
### Sending survey requests from VETtrak

In VETrak, open the Programme Manager by clicking the icon on the toolbar, pressing F9 on the keyboard or by choosing *Manage* > *Programmes* from the menu.

- Identify and select the occurrence.
- Right-click **Enrolments** and choose **Email clients**.

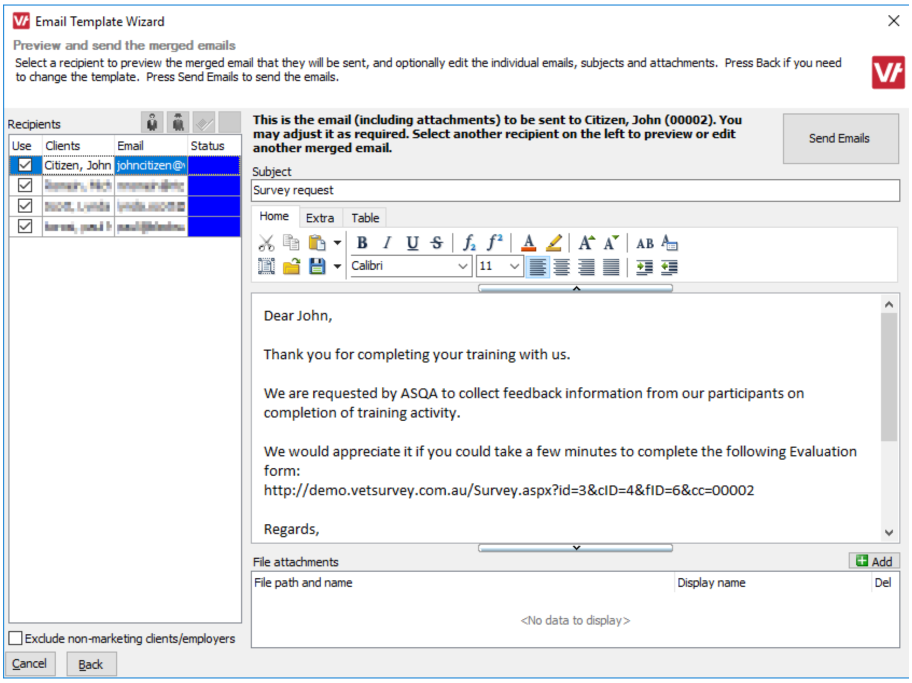



- Click **Compose email from an email template**.




- Select the survey from the **Template** drop-down menu.
- Select the applicable **Staff member for signature**.
- Enter **Your email address (to reply to)**.
- Paste the survey URL into the message, as depicted in the screenshot.
- Click **Next**.

This will display the preview step.




- Select one of the recipients on the left-hand side to preview the message that will be sent.
  - VETtrak fields will have been replaced with real values from the database.
  - Notice the CC parameter is now part of the pasted URL.
- If you are satisfied with the appearance of the message, click the **Send Emails** button at the top right. Alternatively, click **Back** to make adjustments.
- The **Status** for each client will change colours as the email is sent to them.
- Click **Cancel** to exit the Email Template Wizard once all messages have all been sent.

The sent emails will be recorded and can be viewed in the Client Manager for each client.

# Appendix 4: Reporting Recommendations

To get the most out of VETsurvey for reporting purposes, we suggest creating a new survey for each year. This is easily achieved by:

1. Duplicating the existing survey and appending the new year to the survey name.
   Ie. Course Completion Questionnaire - Learner 2017.
2. Edit the surveys to enable the relevant SMART Export option and set the survey that is not currently being used to '*None*'.
3. Editing the survey content, if new questions are needed or existing questions need updates.

Participants can then be directed to the correct survey for the year.

This method ensures that participants can complete the surveys any time, just send them the survey link for the correct year based on the date they completed. Futhermore, old data is retained (providing you do NOT delete your surveys from previous years) and can be reported on as needed.

**SEE ALSO**: Duplicating an Existing Survey on page 31 and also Survey List on page 23 regarding editing the SMART Reporting option and survey contents.

# Appendix 5: Branding Options

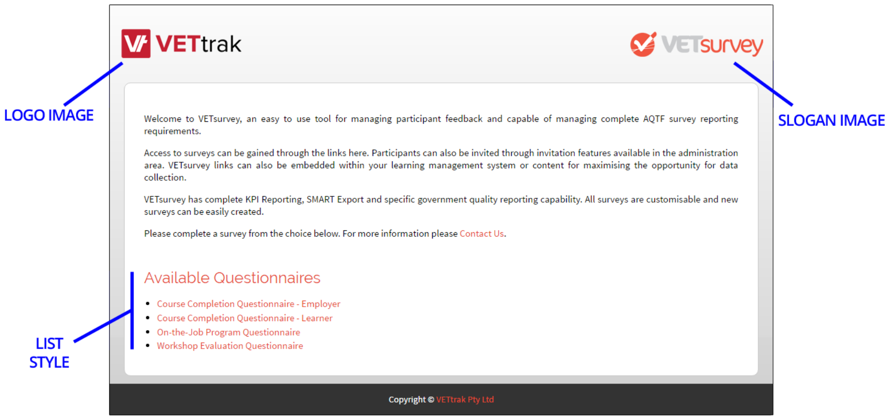
The VETsurvey product offers a number of branding and styling options to customise the product to your company's brand.

There is a choice of three layouts for the main screen:

- Default — the list of questionnaires is displayed beneath the introductory text.
- List Left —the list of questionnaires is displayed to the left of the introductory text.
- List Right—the list of questionnaires is displayed to the right of the introductory text.

**Elements**

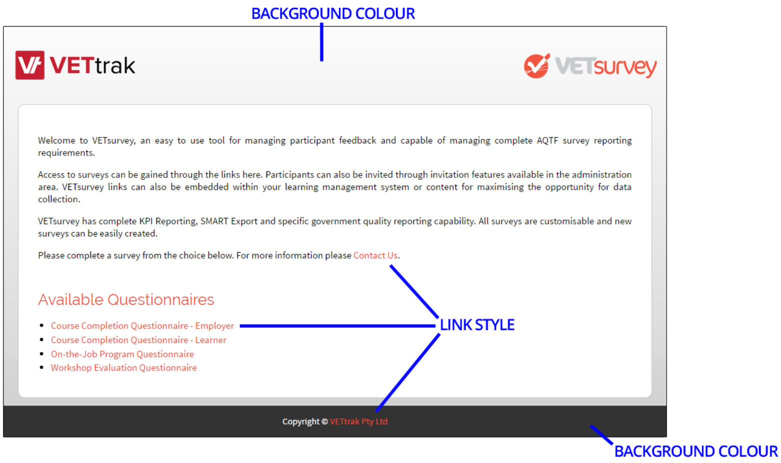
The following screenshot indicates brandable elements of the VETsurvey screen.




- **Logo Image**
  This is the space for your company's logo. The image is recommended to be:
  - 60 pixels heigh and no more than 250 pixels wide.
  - PNG format with a transparent background.
- **Slogan Image**
  The slogan image can be used or alternatively replaced with a site title.
  - 60 pixels heigh and no more than 250 pixels wide.
  - PNG format with a transparent background.
- **List Style**
  There are three styles of list to choose from:
  - Default (as depicted in the above screenshot).
  - Coloured.
  - Button.

**Colours**

The following screenshot indicates colours that can be adjusted:




- Header/Footer **Background Colour**
  Transparent for the header and #333 for the footer are the default colours.
- **Alternative Colour**
  The default is off white (#e2d4c2). This applies to the coloured list style layout.
- **Link Style**
  The colour and decoration used for hyperlinks. The default is VETsurvey Orange (#e94a34). Footer link style may varied if it does not suit the footer background colour.

# Appendix 6: FinPa Integration

| Parameter | Type | Denotes | Description |
|---|---|---|---|
| r | Text | Referrer | Used to track the referral source. |
| f | Text | First Name | Used to pass the client first name from FinPa. Not visible to client and they can still optionally provide their own name. |
| s | Text | Surname | Used to pass the client surname from FinPa. Not visible to client and they can still optionally provide their own name. |
| cog | GUID | FinPa Course Identifier | The value passed should be the FinPa course container GUID. Makes it possible to relate survey data back to a FinPa learning object. |
| cig | GUID | FinPa Client Identifier | The value passed should be the FinPa client (RTO) GUID. |

**NOTE**: All FinPa parameters should be set up as hidden.

**SEE ALSO**: Survey Parameters on page 24 regarding the set up of parameters for surveys and also Custom URLs on page 34 regarding the inclusion of parameters in URLs.

T: 1800 838 872
E: sales@vettrak.com.au
W: www.vettrak.com.au