

SPC Survey Creation Manual

~ This manual is a step-by-step guide on how to build Surveys at SPC.

Step-by-Step Guide:

Step 1: Access the Survey Builder

1. **Navigate to the Survey Builder:** Go to [SPC Survey Builder](#).
2. **Sign In:** Click on **SPC Single Sign-On** and use your SPC username and password to sign in.

Step 2: Main Survey & Form Builder Page

Once signed in, you will see the main **Survey & Form Builder** page.

Survey Details Tab

Step 3: Create a New Survey

1. **Click on Create|New:** To create a new survey.
 - o *Note:* If you already have other surveys created, you can choose to **Clone** one and then edit it.

Step 4: Enter Survey Details

The next screen will contain auto-populated information because you are signed in with SSO. It defaults to the **Survey Details** tab to start.

On the **Survey Details Tab:**

1. **Enter a Specific Title** for your new survey.
2. **Provide Instructions:** Include any instructions users might need to fill out the survey.

Additional Tabs and Features

Completed Survey Tab

Survey details	Completed survey	Access	Theme	Questions	Permissions	Preview	Actions
Edit Completed Survey Settings							
Send submissions to	Submissions are not emailed edit						
Submission Email message	None edit <small>Text added to submission emails (not added to confirmation emails)</small>						
Thank you message	<input type="text" value="Thank you for your submission."/> edit						
Confirmation page	<input type="button" value="Yes"/>						
Confirmation email	No						
Redirect	None edit <small>If you have a thank you message or if confirmation page is enabled, the redirect URL will be displayed to the user as a link. Otherwise the user will be taken to this url automatically when the form is submitted.</small> <small>(SELF = restart survey)</small>						

Created: 10:58 AM, June 3, 2024 Last Modified: 12:16 PM, June 3, 2024

- Adjust settings for survey submissions: Send Submissions (not necessary, but could be emailed)
- Submission Email message: Main email to send to
- Thank You message
- Confirmation page for the user: Set to Yes
- Confirmation email
- Redirect (not necessary- leave blank)

Don't forget to click Save Form

Access Tab

Survey details	Completed survey	Access	Theme	Questions	Permissions	Preview	Actions
Edit Access Settings							
Open Date	06/03/2024 12:00 am edit		Close until this date.				
Close Date	None edit		Close after this date.				
Response limit	No limit edit		Close after this number of responses.				
Require Login	<input type="text" value="No login required"/>						
Access code	<input type="text" value="[None]"/> edit						
Secure (SSL)	<input type="text" value="Yes"/>						
CAPTCHA	<input type="text" value="No"/>						

Closed survey messages

* leave blank for the default message.

Before Open Date [edit](#)

{type} will be replaced with "survey" or "form" automatically.
{open_date} and {close_date} will be replaced with the appropriate date in "Before Open Date" and "Past Close Date" messages.

Click Edit Access Settings to open the options

* = required field

Survey details | Completed survey | **Access** | Theme | Questions | Permissions

Open date: (YYYY-MM-DD or empty)

Open time: (HH:MM AM/PM)

Close date: (YYYY-MM-DD or empty)

Close time: (HH:MM AM/PM)

Response limit: Close after this number of responses.

Require Login: Limit to one submission per user
 Allow Single Sign-On

Access code:

Secure form (SSL):

CAPTCHA:

- By default, the survey is set to Auto Open
- Open Date: If you want it to open on a certain date
- Open Time: If you want it to open at a certain time
- Close Date: If you want it to close on a certain date
- Close Time: If you want it to close at a certain time
- Response Limit: If you want to limit the number of responses that come in

- Require Login: If you want to ensure people taking the survey login to take it
- Adjust settings for survey submissions: Send Submissions (not necessary, but could be emailed)
 1. If you want to limit it to 1 submission per user
 2. If you want to Allow Single Sign On (SSO)
- Access Code: If you want to give one out for Survey Access

Don't forget to click Save Form

Theme Tab

- Banner: Choose your own Banner
- Theme: Click Default Theme to choose from one of the pre-populated themes

Don't forget to click Save Form

Preview Tab

Here you can preview your survey to see how it would appear to users.

Share Your Survey with Others

You can share your Survey with others by copying and pasting the URL address or sharing via a QR code.

Actions Tab

1. Close – the survey
2. Delete – the survey

Survey Results

[Watch this video on how to get your Survey Results](#)

Step 6: Finalize and Publish

1. **Review:** Go through all tabs to ensure everything is set up correctly.
2. **Publish:** Once you are satisfied with your survey, publish it and start collecting responses.