


Returner Tracker Tool Survey Setup

1. Find last year's survey in the survey list

	Any		are you	
		14372	Are You Returning Fall 2012	21.02.2012
		28292	Are You Returning? -Plans and Needs for Fall 2015	30.06.2015
		32247	Are You Returning	13.04.2010
		34683	Are You Returning Spring 2012	07.11.2012
		41157	Are You Returning Spring 2017	17.10.2016
		42351	Are You Returning Fall 2016	01.03.2016
		45357	Are You Returning?	02.02.2011
		54188	Are You Returning Spring 2016	28.10.2015
		56449	Are You Returning Fall 2013	05.03.2013

2. Click on the Create a Survey button () then click on the Copy tab and select the survey that you found above:

Create, import, or copy survey

General Presentation & navigation Publication & access control Notification & data management Tokens Import **Copy**

Select survey to copy: Please choose... Required

New survey title: Alumni in Action 2012 Required

New survey id: Alumni in Action 2013 Required

Convert resource links and INSERTANS fields? Alumni in Action 2015 Optional

Exclude quotes? Alumni in Action- Homecoming 2017

Exclude survey permissions? Are You Returning Fall 2012

Exclude answer options? Are You Returning Fall 2013

Reset conditions/relevance? Are You Returning Fall 2014

Are You Returning Fall 2015

Are You Returning Fall 2016

Are You Returning Fall 2017

Are You Returning Spring 2013

Are You Returning Spring 2014

Are You Returning Spring 2015

Are You Returning Spring 2016

Are You Returning Spring 2017

Are You Returning Spring 2018

Reset start/end date/time? Are You Returning? -Plans and Needs for Fall

3. Once the survey is created, go to General Settings and make the following modifications:

Edit text elements

General settings

Survey permissions

Quotas

Assessments

Email templates

Survey logic file

- a. Make sure that the DateStamp is set to Yes

- b. Refresh the Start Date and time

- c. There are several other settings that can be modified but these two are most important.
- 4. Change all the references from the former semester to the current semester, including:
 - a. Emails (Invitation and Confirmation)
 - b. Questions
- 5. Before you upload the survey participants, make sure to add the appropriate attribute fields (i.e. Student ID, Advisor Name, etc):

- a. Click on the Tokens icon

- b. Click on the Manage Additional Attribute Fields button

- c. Type the amount of fields you will need and then Add fields

- d. Enter the Field Description name and decide if it needs to be Mandatory, and hit Save

Attribute field	Field description	Mandatory?	Show during registration?	Field caption	CPDB mapping	Example data
attribute_1	StudentID	<input type="checkbox"/>	<input type="checkbox"/>		(none)	

- e. Do this for each of the additional fields you will have (except firstname, lastname, email).

6. When prepping your CSV to be imported into Lime, make sure that your headings match what is needed by the system, e.g. firstname, lastname, email. Also, whatever you decided for each attribute needs to be labeled appropriately in the CSV. For example, if you called attribute_1 "StudentID" in the setup, the header for the Student ID column in the CSV needs to be labeled attribute_1.