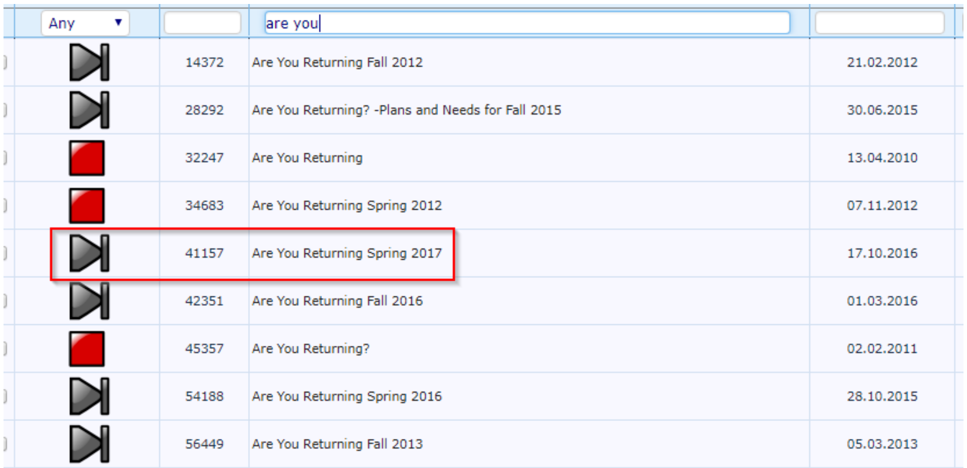
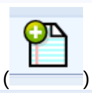
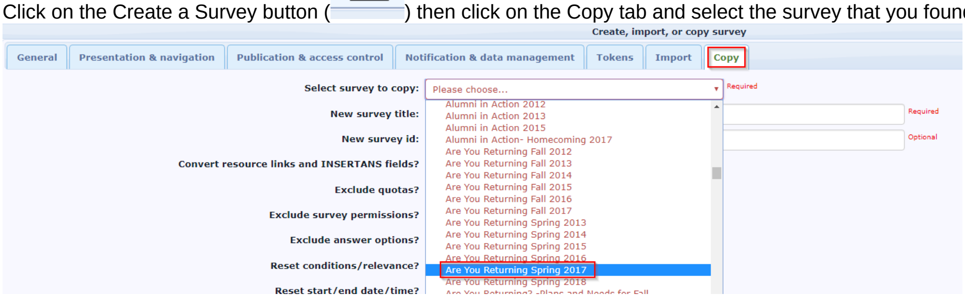
Returner Tracker Tool Survey Setup

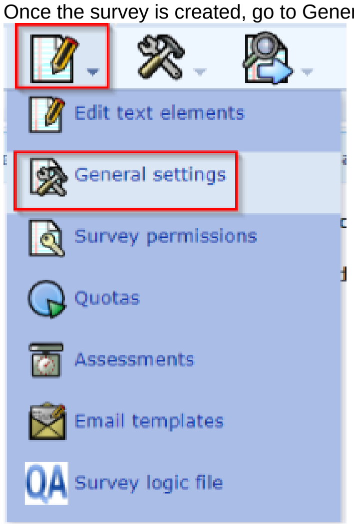
1. Find last year's survey in the survey list



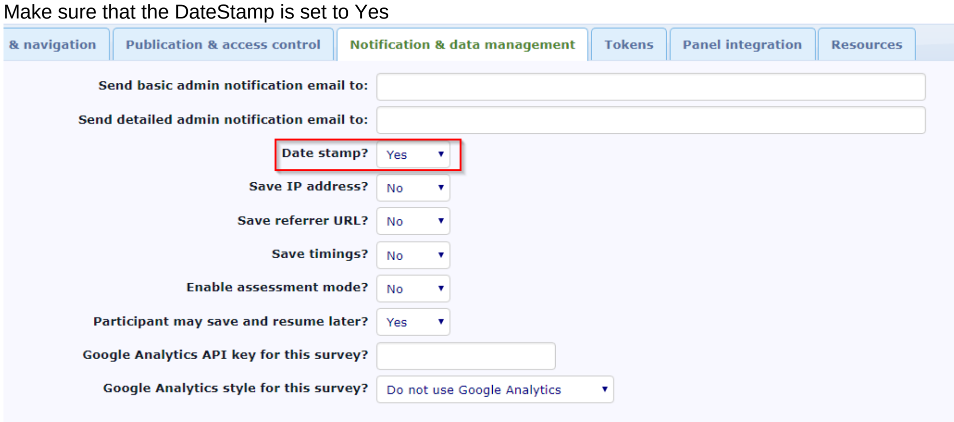
2. Click on the Create a Survey button () then click on the Copy tab and select the survey that you found above:



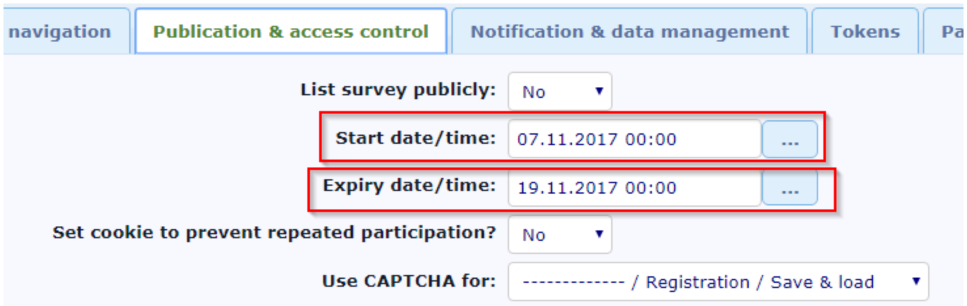
3. Once the survey is created, go to General Settings and make the following modifications:



a. Make sure that the DateStamp is set to Yes

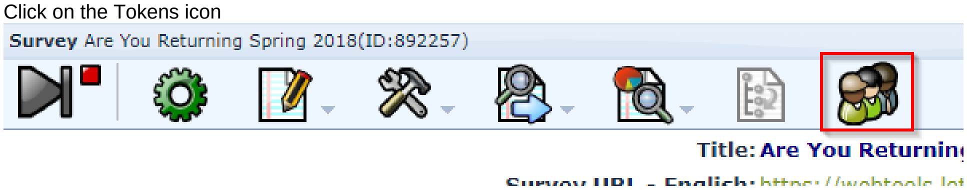


b. Refresh the Start Date and time

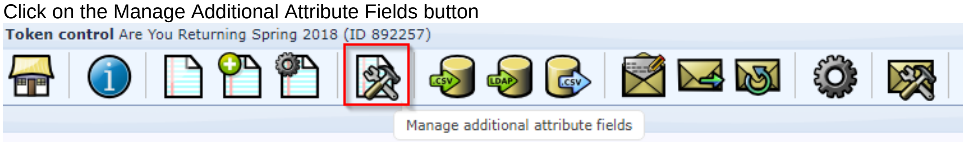


c. There are several other settings that can be modified but these two are most important.

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

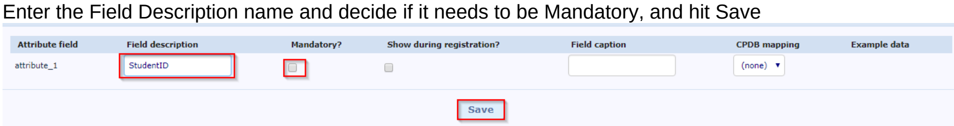


   b. Click on the Manage Additional Attribute Fields button



   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



   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 was 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.