



Select Survey .NET

v5

Custom Dashboard Feature

SelectSurvey.NET Custom Dashboard Feature

v.5.0 11/2020

Screenshots describing use of the custom dashboard feature in SelectSurvey.NET.

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Overview of Custom Dashboard

The below image shows an example of a custom HR Dashboard, which links together three surveys for a respondent (in this case an employee/worker). This is just one of the many applications for linking surveys to assist with your access to the results for a single worker/respondent.

Note that the "Search" box you can search for a respondent with text that will be searched in the common question identifier that is shared between the three surveys, such as email address.

This allows you to see all the responses for this worker related to his onboarding at once without having to go into the results of each survey separately on the main survey list.

This is intended as a shortcut to get to the information you need that enhances the ActiveLogic workflow, if there is one, by helping you to organize the data collection.

SELECTSURVEY.NET V5.0

Sheryl Briggs

HR Worker Status Dashboard

This custom dashboard page allows you to select multiple surveys, to be joined by a common question item such as email address, to show results for a workflow. Click the link button to select a survey, and the items for each column to show on the dashboard grid.

LEGEND: + LINK A SURVEY ↔ CHANGE REPORT COLUMNS - UNLINK THIS SURVEY

Search Item Join Field Across All Surveys... GO

1-HR Worker Request				2-HR Worker Initiation				3-HR Vehicle Request			
Reviewed	response_id	Initiator Email	Worker Email	Reviewed	response_id	Worker Name	Worker Email	Reviewed	response_id	Worker Name	Worker Email
<input type="checkbox"/>	147	sales@classapps.com	jdoe@classapps.com	<input type="checkbox"/>	141	John Doe	jdoe@classapps.com	<input type="checkbox"/>	146	John Doe	jdoe@classapps.com

Delete Dashboard Cancel

How to Create a Custom Dashboard

The below image shows the location of the "Create Dashboard" link button.

- 1) Click "Dashboards", then "Create Dashboard"



The screenshot shows the SelectSurvey.net V5.0 interface. On the left is a dark sidebar with navigation options: Default Dashboard, Dashboards (with a minus sign), HR Worker Status, Create Dashboard (highlighted with a red box), Workspace (+), Help (+), Surveys (+), and Survey Folders (+). The main content area displays the 'HR Worker Status Dashboard' with a description: 'This custom dashboard page allows you to Click the link buton to select a survey, and t'. Below this is a legend: a green plus icon in a square equals 'LINK A SURVEY', and a teal pencil icon in a square equals 'CHA'. A card titled '1-HR Worker' is shown with three action icons (teal pencil, red trash, green plus) above a table. The table has columns 'Reviewed', 'response_id', and 'Initiator Er'. The first row contains an unchecked checkbox, the value '147', and the email 'sales@class'.

Reviewed	response_id	Initiator Er
<input type="checkbox"/>	147	sales@class

2) Enter the name for the dashboard, then click the “Save” button.

Create Dashboard

Create a new dashboard which can join multiple surveys for a workflow.

New Dashboard Options

Dashboard Name:

Test Dashboard

Owners:

admin;

(separate usernames with a semicolon ';' i.e. jdoe;bsmith;)

User Group Owners:

(separate group names with a semicolon ';' i.e. customerservicegroup;techgroup;)

ActiveDirectory/ADFS User Group Owners:

(separate each name with a pipe character(|).)

Dashboard Security:

Restricted to Owners

Select Security Access (Default - Restricted to Owners)

Cancel

Save

3) Click the green plus sign to select a survey to be connected to the custom dashboard:

The screenshot shows the 'Test Dashboard' configuration page. At the top, there is a title 'Test Dashboard' and a description: 'This custom dashboard page allows you to select multiple surveys, to be joined by a common question item such as email address, to show results for a workflow. Click the link button to select a survey, and the items for each column to show on the dashboard grid.' Below this is a legend: '+ = LINK A SURVEY', '✓ = CHANGE REPORT COLUMNS', and '✖ = UNLINK THIS SURVEY'. The main area contains three survey slots labeled 'Survey 1', 'Survey 2', and 'Survey 3'. Each slot has a set of control icons: a checkmark, a red square with a white 'X', and a green plus sign. A red callout box with a white border and a red arrow points to the green plus sign on Survey 1, with the text 'Click plus sign to connect a Survey.' At the bottom of the page, there are two buttons: 'Delete Dashboard' (red) and 'Cancel' (yellow).

4) Select a survey from the dropdown

Link Survey to Dashboard

Link a survey to a dashboard, then select items from that survey to show as columns in the grid or

Link Survey:*

-- Please Select --



- 5) Select the checkboxes for any text questions you want as columns in the dashboard, then select the question from the dropdown that will be joined between the three surveys, such as a common email address question. Then click “Save”. The survey is now linked.

Link Survey to Dashboard

Link a survey to a dashboard, then select items from that survey to show as columns in the grid on the d

Link Survey:*

Select Items for the Grid Columns of the Dashboard, then click "Save" Note that only open ended therefore those are the only question items that will show in the list below.

Select at least one.

210: Enter your email address for your certificate

212: select group

218: Number

214: State

Select a single item to join multiple surveys together in the grid. A common join field would be "email ; align the data across multiple surveys into a single row joined by that question as the common questio

-- Please Select --

▼ (Required for search.)

Cancel

Save

The survey is now linked and you can add other surveys.

How to Manage Linked Surveys in the Custom Dashboard

View the legend at the top of the page for what the buttons do:

LEGEND:  =LINK A SURVEY



 =CHANGE REPORT COLUMNS

 =UNLINK THIS SURVEY

There are link buttons on each response row that enable you to click and view the entire response from the dashboard easily.

test dashboard

This custom dashboard page allows you to select multiple surveys, to be joined by a common survey. Click the link button to select a survey, and the items for each column to show on the dashboard.

LEGEND:  =LINK A SURVEY  =LINK THIS SURVEY

other t

COMMENT: Opens read only survey where you can type in comments on each response answer.

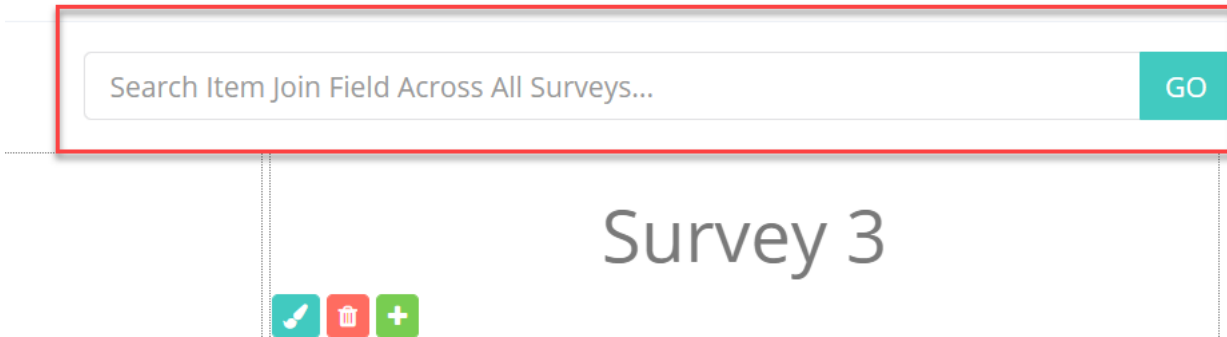
EDIT: Opens editable survey where you can edit answers.

VIEW: Opens the Individual Response Report

Reviewed	response_id	yn	Reviewed
<input checked="" type="checkbox"/>	108 COMMENT EDIT VIEW	[No Answer Entered]	<input type="checkbox"/>
<input type="checkbox"/>	109 COMMENT EDIT VIEW	Yes	
<input type="checkbox"/>	110 COMMENT EDIT VIEW	Yes	
<input type="checkbox"/>	111 COMMENT EDIT VIEW	Yes	

How to Search the Custom Dashboard

One of the main functions of the custom dashboard is the search which searches across all three surveys at the same time for one respondent.

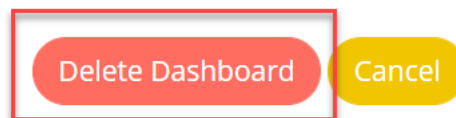
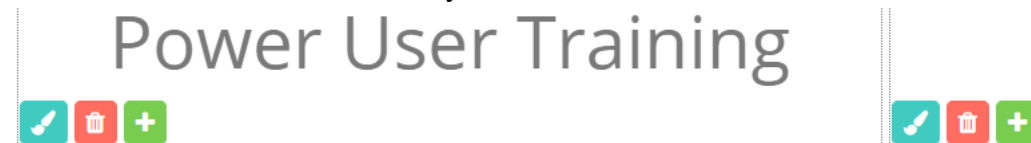


The field searched is the one that you selected when you added the survey to the dashboard, such as the email address question.

So if you search for sales@classapps.com it will search all 3 surveys email question and return the responses that match that for all 3 surveys.

How to Delete a Custom Dashboard

There is also a button to entirely delete the dashboard.



Note that deleting a dashboard does not affect the surveys themselves. The surveys will still appear on the default dashboard.

Also note that you cannot delete the default dashboard which is the main survey list page.

If you have any questions, email technical support tech@classapps.com and be sure to include your customer ID with any correspondence.