



Select Survey .NET

v5

Tutorial: Free Form Report



SelectSurvey.NET Tutorial: Free Form Report

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Contents

SelectSurvey.NET Tutorial: Free Form Report Tutorial: How to	2
Overview	3
Setting up the Survey Questions	3
Report Examples.....	4
Free Form Report Tokens	5
###RAD=SP### Specific Practice Radar Chart.....	6
###GML=GP### Generic Practice Final Levels Chart.....	7
###SML=SP### Specific Practice Final Levels Chart	7
###PL=GP### Generic Practice Response Breakdown Chart	8
###PL=SP### Specific Practice Response Breakdown Chart.....	8
###SR=GAMP### Response Breakdown Chart	9
###SR=ISO### ISO Response Breakdown Chart	9



Overview

This tutorial is to demonstrate how to use the 360 tokens in a free form report.

If you are looking for “canned” reports such as Results Overview, Individual Results, Export or even Custom reports, those automatically show results in a pre-defined format. A free form report is formatted by the creator by a combination of text and tokens. This is the most time consuming type of report to create, since it is not a “canned” report. However it gives you the flexibility of creating a layout not possible in the other report formats.

Free Form Reports are intended for 360 style aggregate score reporting. Typically, an entire graphical report from Word or Excel is pasted into the textbox, then the scored/aggregate numbers are replaced by the "Survey Score and Sum Response Tokens", or the "360 Tokens" from the menu bar in the rich text box labeled "TOKENS". There are SCORE and SUM tokens for each cell of a matrix or question type that has points assigned to it, so that you can take a single column/row and aggregate those totals separately from the rest of the question. When the report is viewed, the tokens are replaced by the real time numeric calculated data from the responses.

Setting up the Survey Questions

In order for any of the free form tokens to work, you must have created questions that have 360 report options selected on the “Edit Item” page (when modifying or creating a survey).

360 Report Options

Question Category: [Click here to Edit Question Categories](#)

SP 2

SP 2

ISO:

true

GAMP:

false

Practice Level

3

In addition to the 360 options, you must also type in points for the answer options which will calculate in the way you expect on the auto generated charts.

Use the "choice – single select options" question type for the free form report token charts.

The below points are set for the examples in this document:

1 ↑↓	fully applies	<input type="radio"/> Default	100
2 ↑↓	largely applies	<input type="radio"/> Default	66
3 ↑↓	does rather not apply	<input type="radio"/> Default	33
4 ↑↓	does not apply at all	<input type="radio"/> Default	0

Report Examples

Below is an example of what a free form report can look like.

It can look however you want it to look – it is comprised of text that you paste into the box on the report configuration page, and rendering tokens that render response results.

Some common ways Free Form reports are created:

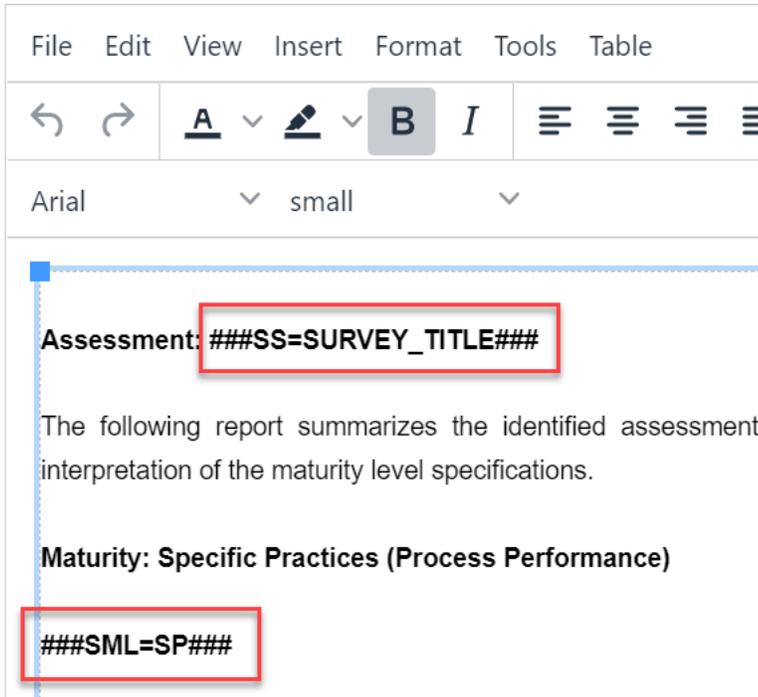
Pasting in a report from another program such as word or powerpoint, and then replacing the values with piping tokens.

Creating a report from scratch in SelectSurvey by typing in text and pasting in piping tokens.

Pasting in a dynamic token that creates a specific chart related to your data by using a SQL query.

On the configure free form report page, you will paste in the tokens where you want them to appear in your custom report like the image below:

To insert page breaks (for the PDF print/view), click "HTML" but



The screenshot shows a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with icons for undo, redo, text color, background color, bold (B), italic (I), and bulleted list. The font is set to Arial and size to small. The main text area contains the following content:

Assessment: ###SS=SURVEY_TITLE###

The following report summarizes the identified assessment interpretation of the maturity level specifications.

Maturity: Specific Practices (Process Performance)

###SML=SP###

Free Form Report Tokens

To access the 360 Reporting tokens, click the "TOKENS" button in the rich text box on the report configuration page.

Tokens available for question grouping and 360: Note that the 360 Question Categories, GAMP, ISO and Practice Levels must be set in the survey design for these tokens to work. The question category, practice level, GAMP and ISO can be set on the edit item page or the manage question categories page. See 360 Question Groups/Categories

TOKEN CHART TYPE

###RAD=SP### Specific Practice Radar Chart

###GML=GP### Generic Practice Final Levels Chart

###SML=SP### Specific Practice Final Levels Chart

###PL=GP### Generic Practice Response Breakdown Chart

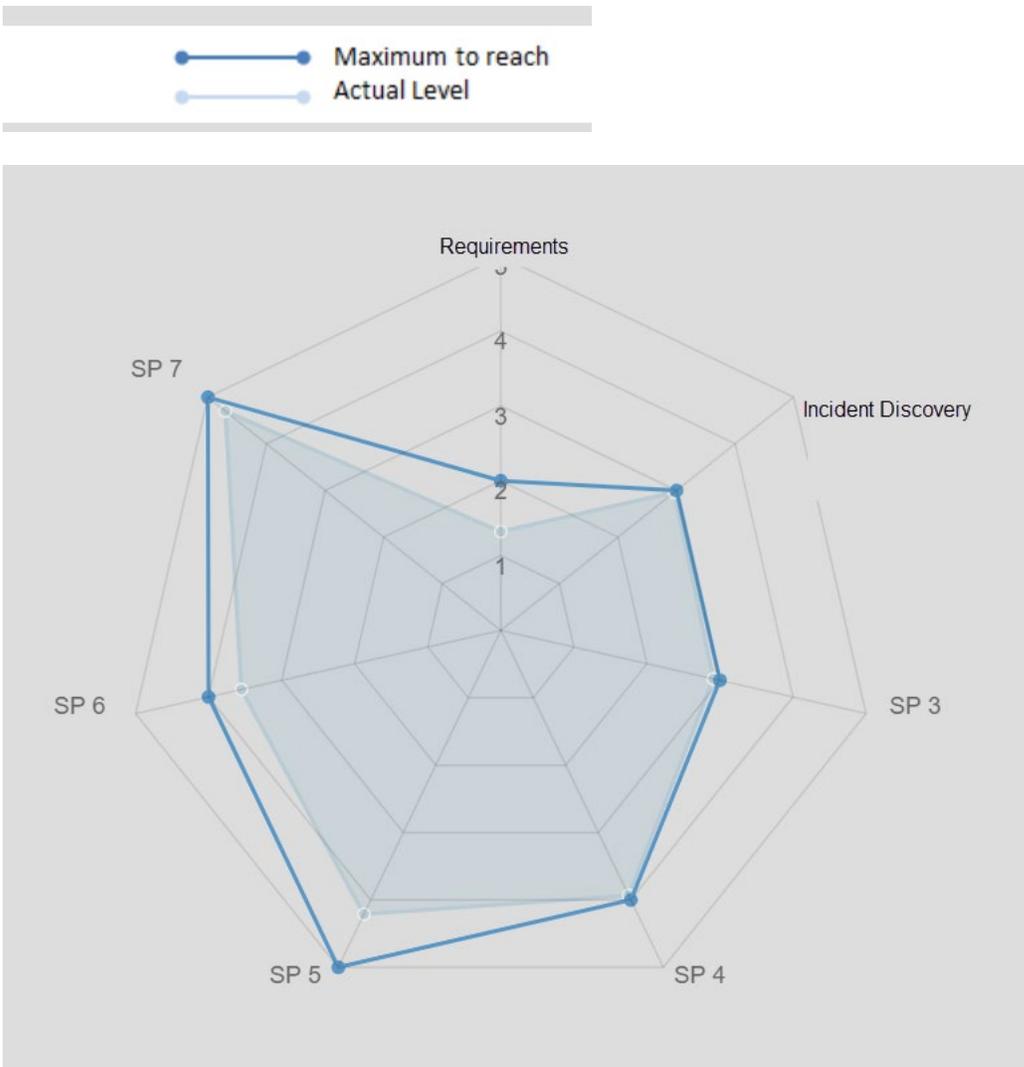
###PL=SP### Specific Practice Response Breakdown Chart

###SR=GAMP### Response Breakdown Chart

###SR=ISO### ISO Response Breakdown Chart

###RAD=SP### Specific Practice Radar Chart

A spider graph is rendered to the report by pasting the token ###RAD=SP### into the free form report text box. If you have questions assigned to specific practice levels, this is an example of what that chart might look like:



This is what was typed into the edit report page:

Specific Practices: Identified degree

###RAD=SP###

###GML=GP### Generic Practice Final Levels Chart

Below is the chart:



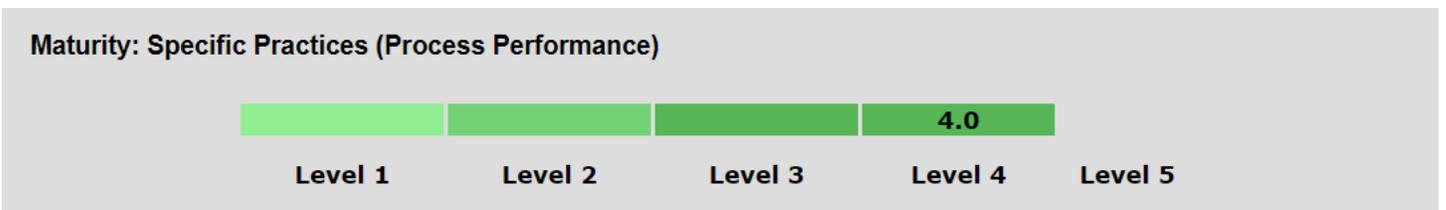
This is what was typed into the edit free form report page:

Maturity: Generic Practices (Process Quality)

###GML=GP###

###SML=SP### Specific Practice Final Levels Chart

This is the chart:



This is what was typed into the edit report page:

Maturity: Specific Practices (Pr

###SML=SP###

###PL=GP### Generic Practice Response Breakdown Chart

This is what the chart looks like:

Generic Practices: Maturity level process quality (intermediate results per category)

	1	2	3
GP 1	0%		
GP 2			
GP 3			77%

This is what the free form report box looks like to generate this:

Generic Practices: Maturity level process quality (intermediate results per category)

###PL=GP###

###PL=SP### Specific Practice Response Breakdown Chart

This is what the chart looks like:

	1	2	3	4	5	
Process understanding and requirements	66%	66%				1.32
Incident discovery, recording, classification, and initial support			96%			2.96
SP 3			91%			2.91
SP 4				93%		3.93
SP 5			66%	55%		4.21
SP 6			72%	83%		3.55
SP 7					70%	4.70

This is what the free form edit box looks like to generate this:

Specific Practices: Maturity level process

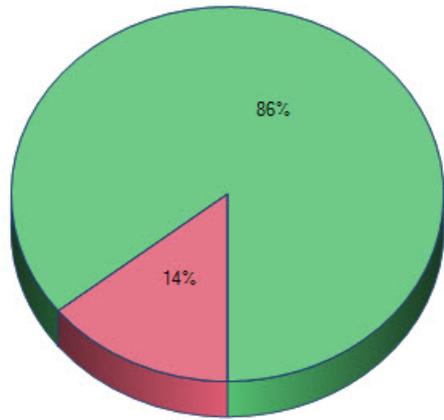
###PL=SP###

###SR=GAMP### Response Breakdown Chart

This chart is a pie, based on the GAMP questions, with a list of the questions and percentage underneath.

###SR=ISO### ISO Response Breakdown Chart

This chart is a pie, based on the ISO questions, with a list of the questions and percentage underneath. This auto fills with the questions from your survey and their point calculations from the points you applied to the answer options, and the respondents selections.



SP 1.8	Question Text	100%
SP 2.11	Question Text	100%
SP 2.12	Question Text	100%
SP 2.20	Question Text	100%
SP 4.36	Question Text	100%
SP 5.45	Question Text	100%
SP 6.53	Question Text	66%