University of Toronto, LLC
SuccessFactors LMS
Creating Surveys

4.1 - Job Aid
This job aid allows learning administrators to create survey and add them to their courses

Creating Surveys

You have to have Local Admin Access to be able to create surveys. course feedback survey assesses a user's reaction to a training event. It is typically most effective if delivered immediately after the training event ends, when a user's reaction to the training is still fresh in his/her mind.

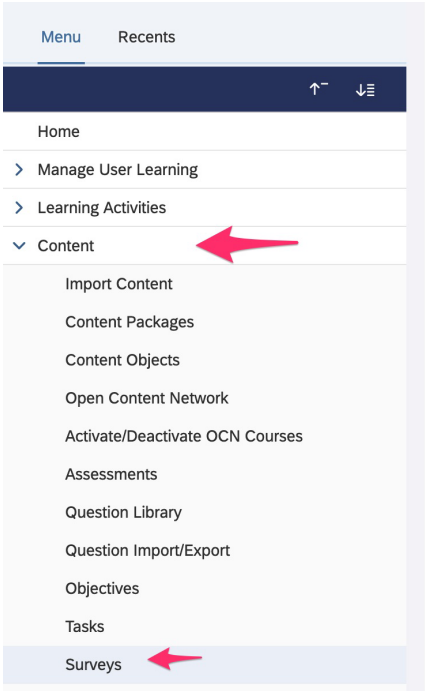
Important Rules to understand when attaching a survey to a course and how it functions.

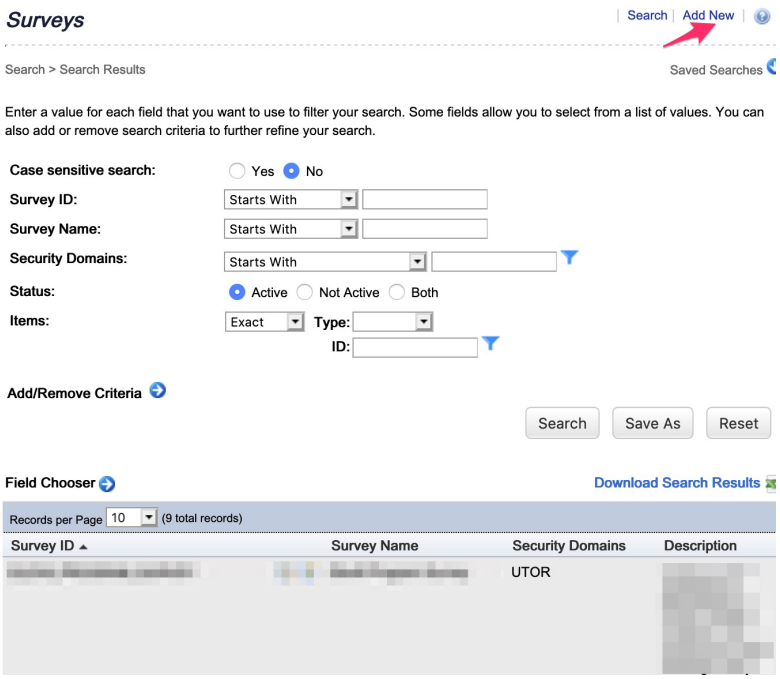
Mandatory Survey – When you mark completion for staff attendance in a class, the registrant will need to complete the survey in order for the system to mark the course as complete in their history. In this case they won't see any record of the class in their history till that survey is complete. The survey is triggered automatically when this option is checked.

NOTE: Steps are different if optional Survey – You will first need to remove the unattended registrants from the registrant list. You would need to click on **Action** on top right and **initiate** the survey. You will **then mark** completion for staff. The survey will show up in their learning tile to complete at any time (open-ended).

- **Deadlines** – for both the above options, you can set number of days to complete survey. If they do not complete it in the set time, they will be prompted with an email notification to do so for the **mandatory survey**. Please note, in the optional survey, the user has the ability to remove it from their learning tile

- Log into the LMS and navigate to the **Admin** using the **Home** Dropdown.





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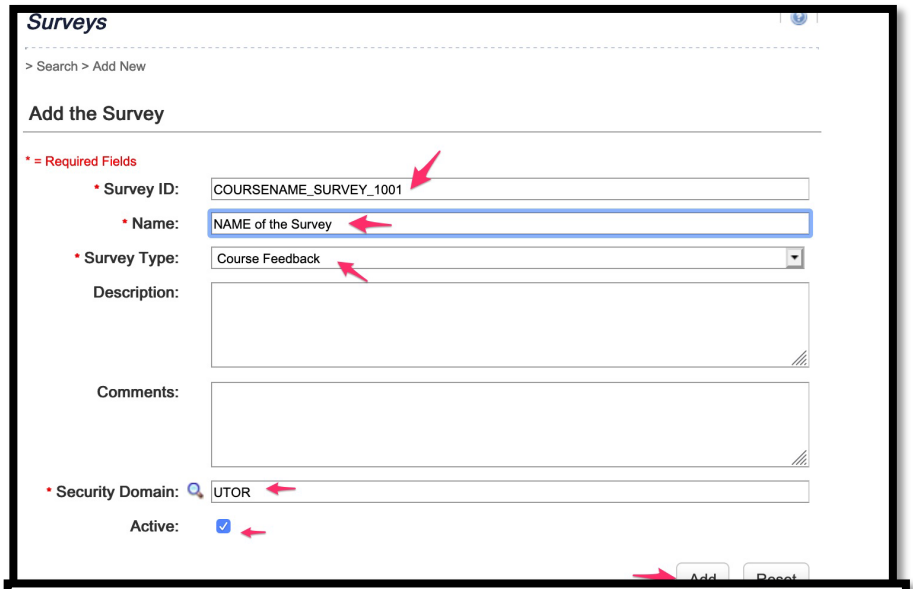
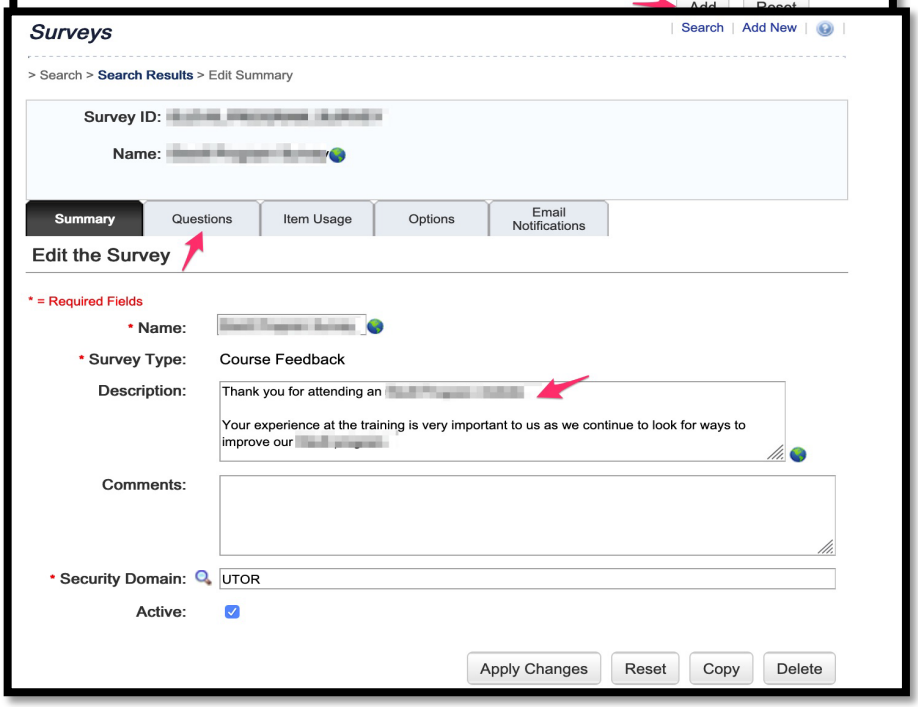
- Click on **Content** on the **Menu** section on the left side and then **Surveys**.
- You can search for existing surveys to edit or **Add new** to create a new one
- You will receive a popup window as displayed below.
- Add a **survey ID** which can be any format, **survey name** and in the **Description,** you can add a welcome note to users completing the survey.
- Make sure Security Domain is **UTOR** and Active and Click **ADD**





The next window allows you to edit the details of the survey. There are 4 tabs at the top

Questions – Add your questions here

Item Usage – Will show you how many complete the survey but not actually provide you the results

Options – Provides options for mandatory, anonymous and days to complete

Email Notification – If you want to edit the email they receive to complete the survey, you can do here clicking on launch editor

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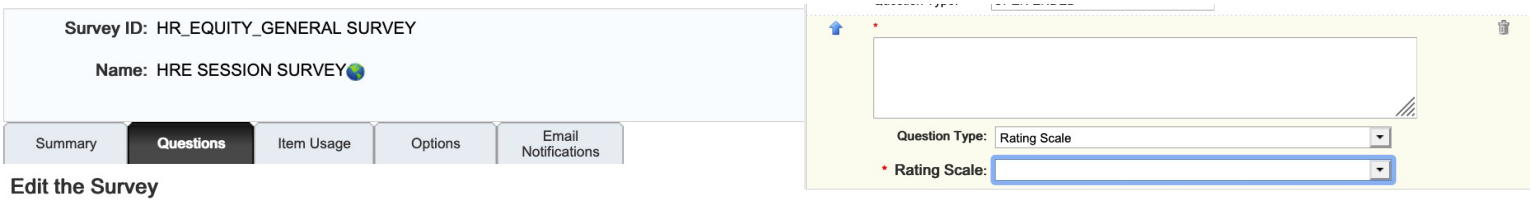
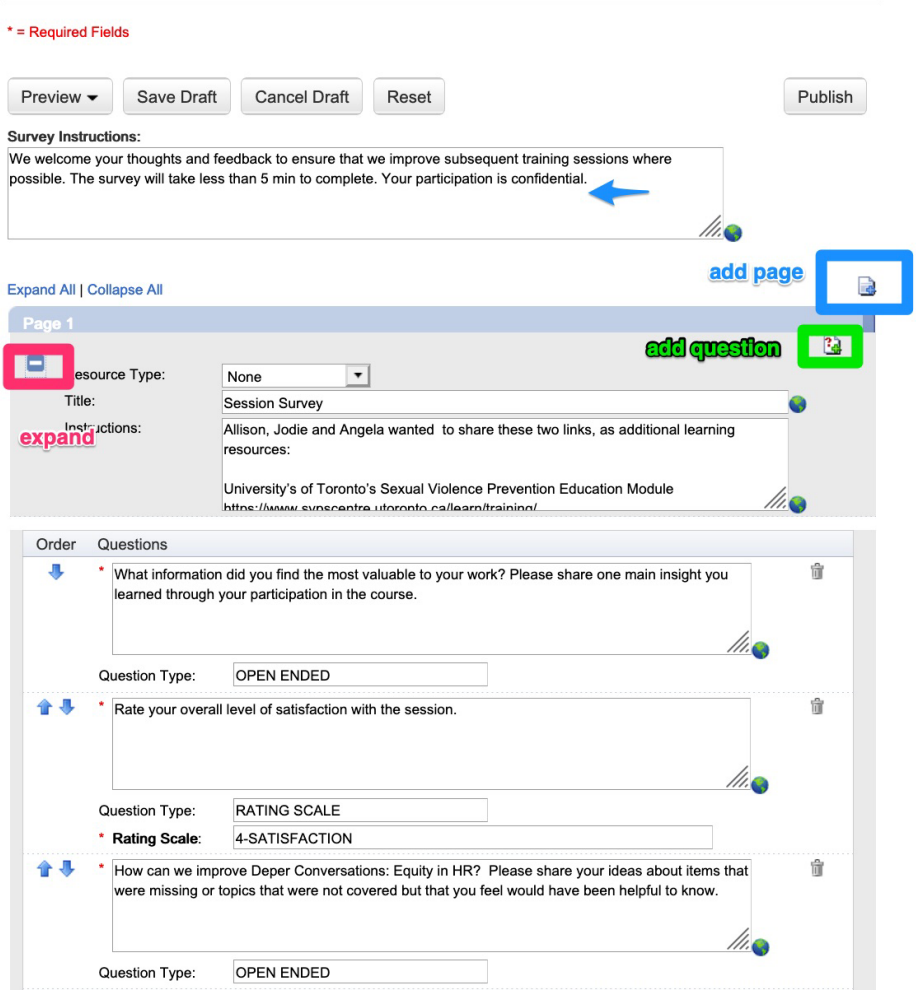
Adding Pages is optional if you have a long survey and want to get input on venue, specific instructor etc.
Add questions will open up question box with 4 question types and 2 rating scales.





You continue to add your questions and you can order them around using arrows on the left side.

Once done, you can save as a draft or publish.

EDITING EXISTING SURVEY

To edit an existing survey, click on Create draft when you search for your survey again. I will allow you to edit questions again. Then click on **publish** at the end.

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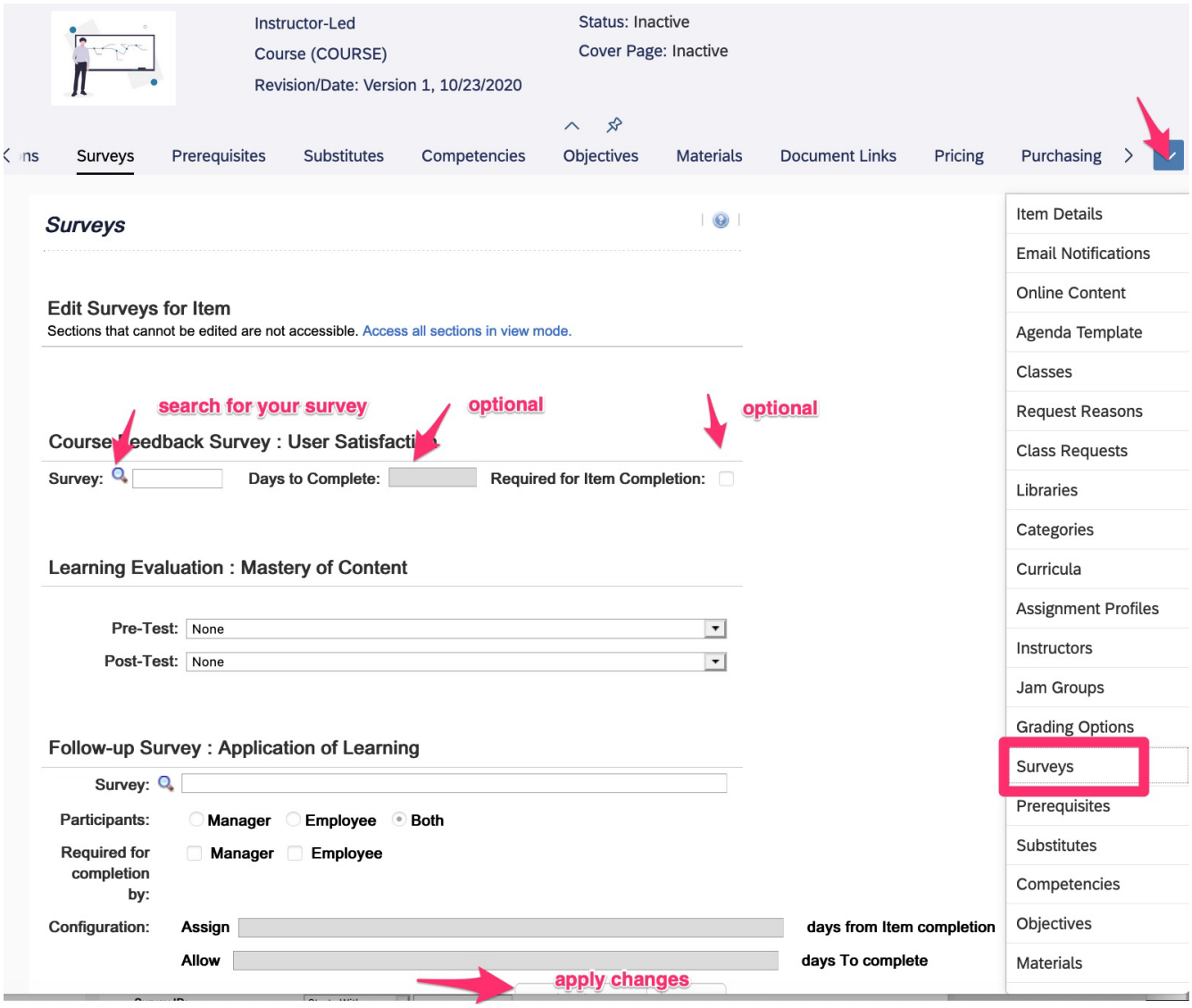
Adding Surveys to Items

1. You can only attach surveys to items and not classes.
2. Navigate to your item, and locate **surveys** as seen in image below.
3. Search for your created survey by clicking on the magnifying icon and search using title or ID from the pop-up window. Once you select the survey from search results, it will populate the field box.

- Make sure to click on APPLY changes at the bottom.
- You can then select the optional days to complete by typing it a number and/or make it mandatory.

See rules at the beginning of this job to refresh on how they affect the attendance.



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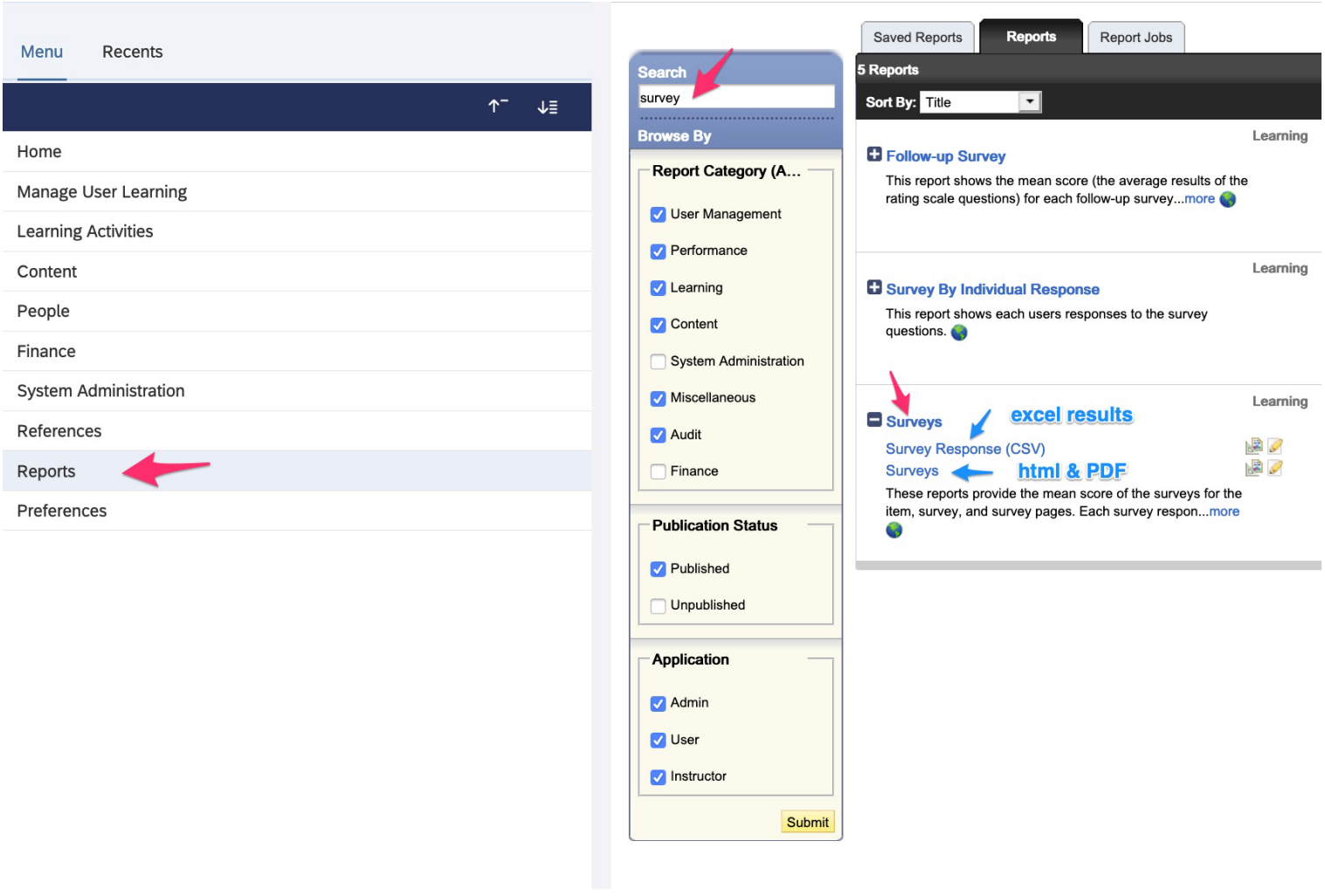
Survey Results Reporting

To access the results of your survey, click on Reports from Menu section. Search for Surveys, and you select from either an excel format for results or an html and pdf graph results.



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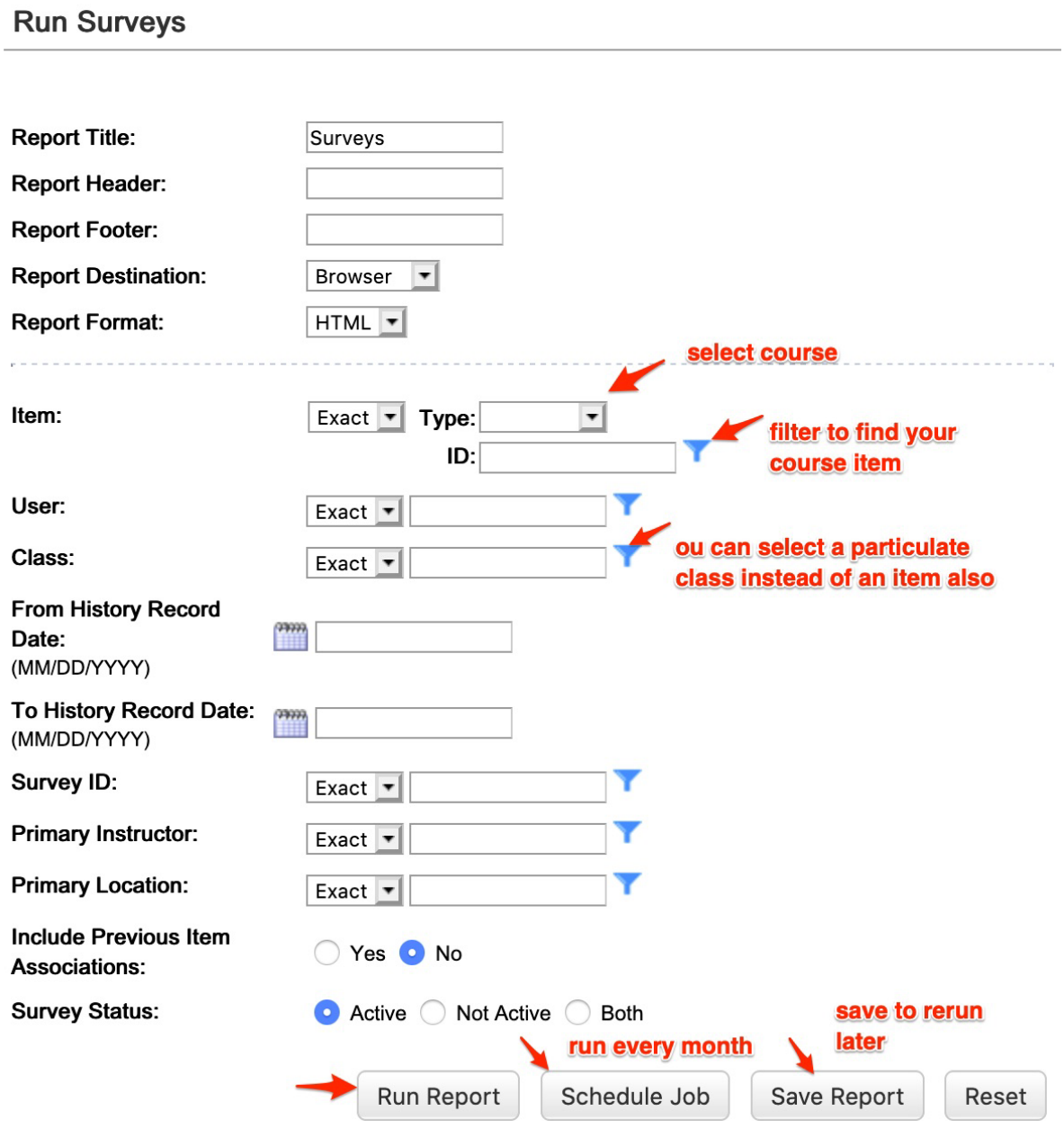
See survey details page below after selecting the above.

Run Report will either display results on screen, download a file or you can have the system email you a copy.
Schedule Report will allow you run this survey daily weekly or monthly.
you can **Save this report** if you want to rerun it again later. It can be access from your saved reports tab at the top of the Reports page.