

Course Description

Join us for hands-on training on the survey functionality of the Onspring platform. Survey Bootcamp is for admin users who have completed Essentials and want to take their learning to the next level. Surveys are a specialized data collection tool in Onspring that enable you to capture point-in-time information from internal and external participants. They provide the flexibility you need to collect information from third parties and leverage it for Onspring analysis and reporting.

In this bootcamp you'll receive training materials and login credentials for a dedicated Onspring lab instance. We'll guide you through an end-to-end survey configuration process, focusing on a sample use case. You'll gain knowledge that you can apply to any survey you may implement in Onspring, and practical skills for integrating survey data into your Onspring universe.

Questions? Please email training@onspring.com.

Session Abstracts

Survey Structure & Questions

A survey is a specialized tool for capturing information from users, non-users and external parties. In this session, you'll explore survey use cases and their structural components. You'll also learn how to configure questions, organize them onto pages and preview the survey experience.

Learning Objectives:

- Understand the purpose of surveys, how they differ from apps and how they are structured
- Configure general survey properties, and see how to add questions from scratch, import them from other surveys and move questions in the survey interface
- Explore question properties, such as correctness, optional/required comments, default values, etc.

Branching Logic & Scoring

Surveys don't have to be "one size fits all." With branching logic, you can tailor surveys for individual participants. Additionally, Onspring scoring functionality allows you to quickly measure how participants align with your expectations. In this session, you'll learn how to configure branching logic and scoring in combination to improve the participant experience and make survey results more meaningful.

Learning Objectives:

- Understand how question branching and page branching differ and how to configure each branching type based on logical conditions
- See how to apply scoring to individual questions and organize questions into score groupings
- Explore options for viewing survey results when branching and scoring are used together

Survey Supporting Data

When a participant submits a survey into Onspring, that submission is captured as a record in the survey supporting data app. In this session, you'll learn how to configure the app to manage survey submissions in the context of your overall business process.

Learning Objectives:

- See how to relate survey records to other content in Onspring (e.g., relating assessments to vendor profiles)
- Explore survey answer fields, which enable more detailed reporting of survey results

Survey Campaigns

In order to present a survey to participants, you need to create a campaign. In this session, you'll learn how to configure campaigns to send surveys to defined participants or open up a survey for unsolicited responses.

Learning Objectives:

- Understand the difference between targeted recipient campaigns and public campaigns
- Explore campaign properties, such as delegation, notifier emails, post-submission edit rights, etc.
- Learn how to test and launch campaigns to start collecting survey responses

Survey Auto-Delivery

Using automation functionality in Onspring, you can send surveys to targeted recipients on a schedule or based on logical conditions in a parent record. In this session, you'll learn how to configure the Create One Record outcome type to remove manual effort from the survey delivery process.

Learning Objectives:

- Explore use cases for survey auto-delivery in the context of multiple business processes
- See how to configure the Create One Record outcome to auto-send surveys
- Learn tips and best practices to keep survey auto-delivery running smoothly

Survey Reporting

You can report on survey results in Onspring just as you would report on app content. In this session, you'll learn how to access campaign reports and configure your own reports to view survey submissions in aggregate form.

Learning Objectives:

- Explore the campaign response report, which provides a holistic view of survey results
- See how to build hierarchical reports to display survey records and underlying questions/answers
- Understand how to employ survey answer fields to build focused, chart-style reports