Creating and Sending a Survey

The campus-wide tool for creating surveys is called Baseline. Users are grouped by department, and each survey within a user's account is called a project. Workspaces within Baseline are configured to support collaboration. Accordingly, by default, all of the individuals within your own campus organization or department have access to survey projects created within the group's designated space. Private research space can be created upon request, by submitting a ticket to the Helpdesk. Follow the instructions below to get started.

To create a new survey project:

1. Go to Baseline at [http://www.hws.edu/baseline](http://www.hws.edu/baseline)
   We recommend bookmarking this link for future reference.

2. At the login page, enter your **HWS username and password**

3. Click **Sign In**

4. On the upper menu, click **Projects**

5. To the right of the Projects header, click **Create Project**
6. Complete the project information:
   - Enter a survey title (including the semester and year in the project title may be helpful for later searches)
   - Select your department
   - Select dates for the survey to open and close
   - Enter any notes about the project
   - Complete the unique link to the survey

7. Click on the arrow for the Advanced Options dropdown menu

8. Decide if advanced options are required for privacy or security and click on the applicable boxes:
   - Requiring a Secure Connection would be advantageous if you do not have images in your survey and you want extra security
   - If you do not want the possibility of a user’s name to appear in a downloaded excel file (possible if using Mass Mailing) then select Hide User Information in Report
   - If complete privacy is desired, including the prevention of these survey results from being accessible in another survey, select Hide Project Results from Cross-Project Reporting

9. Click Create

An empty survey will be created and a survey editing page will appear.
10. At the upper left, click **New** to begin adding questions.

11. From the list that appears, select the **question type**.
12. After adding all the questions, at the upper left of the page, click **Done Editing**

![Image of Done Editing button]

13. Send the survey to recipients, using either of the following:

- In the left column, under Administration (Web), the unique link to the survey will be shown, and may be copied and pasted into an e-mail to survey recipients.

  *Note:* If you use this option, responses are anonymous (unless you add a validation) and respondents can access the link an unlimited number of times.

![Image of Administration (Web) section]
• Alternatively, below the Administration area, use the Mass Mailings feature to send a group of recipients the link to the survey.

*Note:* With this option, a unique link is sent to each e-mail address so respondents are identified and may only complete the survey once; respondents may leave the survey and return to it where they left off; reminders may be sent to non-respondents only.

a. Click **Manage**

b. On the Mass Mailings page, click **Create New Mailing**

c. Follow the instructions on the Blank Mailing page to compose the message

d. Within the message, where you want the survey link to appear click the yellow [**Insert INSTRUCTIONS**] button

*Note:* It will appear as just [**INSTRUCTIONS**] in the message text; this is normal.

e. Click **Create**
f. Follow the instructions on the mailing completion page to select recipients and schedule the date/time to send the e-mail

![Survey Tool Interface](image)

<table>
<thead>
<tr>
<th>Details</th>
<th>Date To Send</th>
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</thead>
</table>
| **To:** *Recipient Name*  
*Recipient Email*  
From: *From Name*  
Proxies: *Proxy List*  
Reply To: *Reply To*  
Description: *Description*  
| **Send Date:**  
**Send Time:** |

Message:

![Message Area](image)

| Default: *Default Text*  
*Custom Text*  
| ![Custom Options](image) |

To ensure your e-mail is what you want, above the Details area, click the Preview button.

h. When your e-mail is ready, click Finish

If you have any trouble with the above process, please contact the Help Desk in the Library Learning Commons or 315-781-4357 (ext. 4357/HELP on campus) or helpdesk@hws.edu.