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Requesting a Project in Self-Service Builder

In self-service builder, you would only need to request a project if you want to upload data from other sources into our system.

Examples of data you can upload are:

- Demographic data
- Previously-collected data
- National benchmarking data

To request a data upload project:

- Make sure you are under the "Baseline" tab, under "Projects" subtab
- Click the "Request Project" button when in the "Projects" subtab
- Fill out the required information (e.g., title, date range) pertaining to your data upload. In the Additional Project Notes section, indicate that this is a data upload. Once you submit your...
request, you will be taken to your project dashboard.

- Once you are on the project dashboard, upload a copy of the survey instrument and the raw data (in either Excel or SPSS) into the Project Files module on the dashboard.
- A representative from Campus Labs will contact you with any questions regarding the upload, or if the upload is done and ready for you.

Happy Requesting!
Creating a New Project in Baseline

Self-service builder is a tool that allows you to build your own surveys in Baseline. This can be a survey started from scratch, or a copy of a survey that has previously been administered in Baseline.

For new projects not previously administered in Baseline

Follow the steps below to get started:

- Make sure you are under the "Baseline" tab, under the "Projects" subtab.

- Click on the "New Project" button to get started.

- You will now be taken to a page asking you to provide some information about your project.
Title

Create a title that is descriptive. If it is a recurring assessment, you may want to include the time period (e.g., Mock Interview Fall 2011, Mock Interview Fall 2012) so as not to confuse your assessments from different time periods with each other.

Department

Select the department that is launching the survey. Generally speaking, everyone with departmental access to this department will be able to see the project and its data. The only departments you will see listed in the dropdown here are the departments you have access to.

Open date and Close date

Input (or click and select from the pop-up calendar) the date/time you want your survey to begin collecting data in the Open Date section.

Input the date/time you want your survey to stop collecting data in the Close Date section.
Notes

Include any information about the project that you want others to see here. This is displayed on the project’s dashboard.

Project link

Type in what you want the URL/web link to be here. This will be the URL/web link to your survey.

- At the bottom of the page, you will see a section titled Advanced Options. Clicking on this section will expand a list of special settings that allow you to do a few additional things:

Require Secure Connection (https)

Requires that the respondent be able to establish a secure connection before taking the survey

Hide User Information in Report

Hides the respondents’ identifying information (e.g., e-mail addresses) when the raw data is exported

Hide Project Results From Cross-Project Reporting

Prevents data in this project from being available for reference by other projects
Once everything has been filled out, click "Create" to create the project.

** Please note: You may change these project settings at any time by clicking the "Settings" button on the Project Dashboard.**

For information on editing a project, please reference the "Editing a Project" section in the guide.
Creating a Copy Project in Baseline

Self-service builder is a tool that allows you to build your own surveys in Baseline. This can be a survey started from scratch, or a copy of a survey that has previously been administered in Baseline.

To copy a project previously administered in Baseline

Follow the steps below to get started:

- Make sure you are under the "Baseline" tab, under "Projects" subtab.

- Find the title of the project you wish to copy and click to enter the project.
- Once you've entered the project, click on the "Copy" button (located next to the "Settings" button) among the cluster of buttons near the top right hand corner of the dashboard.

- This will create an exact copy of the original project. You will be able to edit the project just as you would if you were creating the project from scratch.

For information on editing a project, please reference the "Editing a Copy/Already Existing Project" section in the guide.
Editing a Project in Baseline

You can edit a newly created project, a copied project, or any project that exists in the system. Follow the steps below to navigate yourself to the Project Builder area.

Editing a project when you are already on the Project Dashboard:

- Click on the "Edit" button (located next to the "Settings" button) among the cluster of buttons near the top right hand corner of the dashboard.

- You will now be brought into the Project Builder section, which is where all the survey building/creation tools are housed. This is where you can work your magic and create your very own survey!
Happy Building!

**To get started with building your project, please reference the sections on adding pages and questions to build your survey.**
Editing a Project in Baseline

You can edit a newly created project, a copied project, or any project that exists in the system. Follow the steps below to navigate yourself to the Project Builder area.

Editing a copy project or project already housed in the system:

- Make sure you are under the "Baseline" tab, under the "Projects" subtab.

- Find the title of the project you wish to edit and click to enter the project.
- Once you've entered the project, click on the "Edit" button (located next to the "Settings" button) among the cluster of buttons near the top right hand corner of the dashboard.

- You will now be brought into the Project Builder section, which is where all the survey building/creation tools are housed. This is where you can work your magic and create your very own survey!
Happy Building!

**To get started with building your project, please reference the sections on adding pages and questions to build your survey.**
Creating/Adding/Moving/Deleting Pages in Builder

The first step to getting started with creating your survey would be to create the pages on which to place your questions.

There are a couple ways to create/add a page in Project Builder.

Editing Pages when on Project Builder Page Sorter/Overview Page

The page sorter/overview page lets you can add pages, move pages, and delete pages.

- When you're on the Project Dashboard of the project you are creating/editing, click on the "Edit" button.
- If it is a new project, you will find yourself on the first page of your project. Click the page button in the middle of your page to enter the Page Sorter/Overview Page.

Creating/Adding a Page

- Click the "New Page" button to add a page
Moving a Page

- Hover over the page you want to move (it should be outlined in yellow to show your selection)
- Move your mouse to hover over the small directional arrow symbol at the top left corner of a page (your mouse pointer should turn into a 4-directional arrow symbol)
- Drag and drop to move the page
Deleting a Page

- Hover over the page you want to delete (it should be outlined in yellow to show your selection)
- Click on the red arrow at the top right corner of the page you want to delete

Creating/Adding a Page when on a Page

- Click on one of the "plus and arrow" icons near the middle top of the page to add a new page either before or after the page you are currently on. (There are two icons: the one to the left allows you to add a page in front of the page you are currently on, the one on the right allows you to add a page after the page you are currently on.)

**Please note that if you are creating a new project with no questions built yet, you will automatically be taken to Page 1 when you click the "Edit" button from your project dashboard.**
Click on the "page icon" at the top middle of the page you are on to get to the page sorter/overview page. This page will allow you to navigate to different pages in the survey. Or you can just click on the forward and back arrows framing the "page icon" to move from one page to the next.

**Please reference the Question Types in Builder section to find out about the various question types and functions you can use while building your survey.**
Adding Questions to Your Survey

To add/build questions to your survey:

- When you are on a page within your survey, click the "New" tab on the left side of the screen.
- The tab will expand and show you all your question type/building tools.
- Click on the specific question you want to add to add it to your project OR you can click on "Add Question" in the middle of the page to get started.

**Please reference the Question Types in Builder section to find out about the various question types and functions you can use while building your survey."
Editing Questions

Any question that you have created can have the question and answer text edited.

To edit the question:

You can edit the question by clicking on the question text when in builder. This will then take you to a window which has several tabs that allow you to edit aspects of the question.

**General Tab:** Here you can edit the question text, as well as modify a few other aspects of the question.

- **Shuffle Answers** - When checked, it randomizes the order in which the answers are presented
- **Required** - When checked, indicates that the respondent is required to answer the question before progressing to the next page of the survey
Reporting Tab: Here you will find options for the reporting and analysis features of our survey tool.

- **Question Text for Report**: Customizes how the question is reported on the Results Page. Suppose you ask "How old are you?"; you may want the report to just say "Age" rather than the whole question, in which case, type "Age" into this box. Institutions may also use this to label their questions differently for consistency in their instrument, e.g., "Cumulative GPA" coded as "cGPA", or "Semester GPA" coded as "sGPA."

- **Show in Report**: Includes the question in the report.

- **Scale Values**: Allows you to assign a numeric value to scaled, ordinal or continuous data so that the system will generate the appropriate statistical analysis when reporting data. “Ascending” automatically assigns an upward scale starting with the number 1 for your first answer choice. “Descending” automatically assigns scale that counts down to 1 in the order of your answer choices. “Custom” allows you to assign specific numeric values to each answer choice.

- **Alternate Codes**: Numerical values that are assigned to the answer options for coding purposes (e.g., Male = 1, Female = 2). These values do not have any quantitative value
and are used for categorical purposes only.

**If you are using scale values, we recommend that the alternate codes match the scale values.

For **Multiple Select** questions: You can adjust the minimum/maximum number of answers that can be selected by clicking on the question text and adjusting the numbers in the drop-down menu.
For **Matrix** questions that use a **Multiple Textbox** format: You may put restrictions on the text box (e.g., zip code, e-mail address, phone number) just as with any other text box answer option by clicking on the answer text. You may also mark each answer as "Exclusive" if you want respondents to only be able to enter text under one answer per question/row.
To edit an answer(s):

You can edit the answers by clicking on the answer text you want to edit in builder. This will then take you to a window which has several tabs that allow you to edit aspects of the answer.
General Tab: Here you can edit the answer text, as well as modify a few other aspects of the answer.

- Display on Survey: All answers will display on the survey by default. If you want to "hide" an answer without deleting the answer altogether (and thus all data associated with that answer), then you may uncheck this box. If the box is unchecked, then the respondent will not see this answer option.
- Opt-Out: Designates that answer option as an "N/A" or "Does not apply" answer.
- Include Textbox: Provides a textbox for manually entering information (e.g., "Other (please specify)" or "Yes (please explain)/No").
- Pre-Selected: Sets that answer option as the default.
Reporting Tab: Here you will find options for the reporting and analysis features of our survey tool.

- **Answer Text for Report**: Customizes how the answer is reported.

- **Scale Values**: Allows you to assign a numeric value to scaled, ordinal or continuous data so that the system will generate the appropriate statistical analysis when reporting data. “Ascending” automatically assigns an upward scale starting with the number 1 for your first answer choice. “Descending” automatically assigns scale that counts down to 1 in the order of your answer choices. “Custom” allows you to assign specific numeric values to each answer choice.

- **Alternate Codes**: Numerical values that are assigned to the answer options for coding purposes (e.g., Male = 1, Female = 2). These values do not have any quantitative value.
and are used for categorical purposes only.

**If you are using scale values, we recommend that the alternate codes match the scale values.
Display Rules/Skip Logic

In our system, we are able to have question branching, where certain questions in a survey display depending on the answer choice selected to a previous question. There can be several forms of branching added to a page or question.

An example would be a "Yes/No" question. Those who answered "Yes" will see a certain question, while those who select "No" will see a different question.

There are a few ways in which branching can be set up in our system:

**Display Logic (this can be used on questions and pages):**

- When in the "edit mode" of a question or on the "page properties" of a page, click on “Display Logic” tab.
- Click "Add Condition" and select what question/answer the current page or question will display off of.
- The answers will automatically populate; select the appropriate answer option.
- Indicate whether the rule is based on whether the indicated answer is **Selected** or **Not Selected** by the respondent.
- If you add more than one condition/rule, you must indicate whether both conditions you specify must be met in order for the question/answer to be seen by the respondent (AND), or whether either condition can be met for the question/answer to be seen by the respondent (OR).
- To group conditions together, simply click on the check box next to the relevant condition/rules, and click "Group Selected." When you create groups of conditions, it also allows you to specify whether these conditions must be true or false in order to display.
Skip Logic (this is only used at the question level):

- When in the "edit mode" of a question, click the “Skip Logic” tab.
- When under the tab, you will be able to direct certain answer choices to certain pages in the survey; choose a page to direct each answer choice to.
- This option will not be present on questions on the last page of a survey.
Skip to Page *(this is only used at the page level):*

- When in the page properties, select the "Skip To" tab.
- Indicate the page you want to display next, after the page you are currently on.
Question Types - Multiple Choice

Multiple choice questions allow respondents to select from a pre-made listing of answers.

To add a multiple choice question to your survey:

- When you are on a page in Project Builder (see sections on editing a project/adding pages in builder if you are not sure of where you should be), click and expand the "New" tab on the left side. The multiple choice questions are housed in the first section.
- Click on the type of question you want to add and you will be prompted to type in the question text and answer text for your question.
- Click "Ok" to create the question.
Listed below are all the **multiple choice question types** available for you to use in builder.
**Single Select:** Able to select a single answer.

What is your academic classification?

- Freshman
- Sophomore
- Junior
- Senior
- Graduate student

- "Last answer is an Opt-Out" should be checked if the last answer in your list/array functions as a "Not applicable," "No response," "None of the above," or similar answer. If values have scale values assigned to them, an Opt-Out answer will NOT have a scale value assigned to it (i.e., it will not be included in statistical calculations).
• Can add a textbox to any answer choice by selecting that answer option once you have clicked OK to create the question.
• Can have an answer be ‘pre-selected,’ or set as the default selection.
Dropdown: Single select, but displayed in dropdown menu; this is ideal for long lists (i.e., majors, states, countries). Dropdowns cannot include textboxes.

- Can have an answer be "pre-selected"
Multiple Select: Able to select multiple answers.

What events you would like to see next semester? (Check all that apply)

- Guest speakers/presenters
- Residence hall spirit week
- Cooking contests/Potluck
- Sporting events
- Concerts
- Other (please specify)
- I would not like to see any events.

- "Last answer is an Opt-Out" should be checked if the last answer in your list/array functions as a "Not applicable," "No response," "None of the above," or similar answer.
- Can add a textbox to any answer choice
- Can have an answer choice be required (must select that answer)
- Can have an answer be "pre-selected"

Ranking: Allows for ranking of answer options; each rank order may be assigned to only one answer option (e.g., Rank your top 3 choices).
We are trying to prioritize renovations to the residence halls. Please rank the importance of the following renovations for your residence hall: (1 = most important, 3 = least important)

Select Answer ▼ Lounge/lobby area
Select Answer ▼ Study rooms
Select Answer ▼ Bathrooms
Select Answer ▼ Kitchen area
Question Types - Text Entry

Text entry questions allow your respondent to type in freeform answers, and can allow for longer responses.

To add a text entry question to your survey:

- When you are on a page in Project Builder (see sections on editing a project/adding pages in builder if you are not sure of where you should be), click and expand the "New" tab on the left side. The text entry questions are housed in the second section.
- Click on the type of question you want to add and you will be prompted to type in the question text (and answer text, if applicable) for your question.
- Click "Ok" to create the question.
Listed below are all the text entry question types available for you to use in builder.
Textbox: Provide single textbox for manually typing answers.

Please enter your name:

Multiple Textbox: Provides multiple textboxes for answer entries.

Please list the three things we should improve upon:

1. Accuracy
2. Speediness
3. Communication

- You will need to enter in "answer text" to differentiate/label the textboxes in this type of question.

Sum: Requires respondents to enter numerical answers, which are automatically summed.
Statistics will be provided in the Reporting Site for each answer option.

"Require Total" requires respondents to sum to a specific total. For instance, if you ask people to report what percentage of time they spend engaged in certain activities, you could require their answers to sum up to 100.
Add Sum

Question Text

What percentage of your day do you spend doing the following?

Answers

Eating
Sleeping
Studying
Attending class
Socializing
Spending time on the computer
Other

☑ Require Total  Value 100

Ok  Cancel
Question Types - Other

**Instructions:** Provides an area to enter instructional text without requiring answer choices (e.g., introduction, instructions, background information, consent information). You are able to bold, color, hyperlink, etc. your text in this area using the available text editor buttons.

**To add an instructions question to your survey:**

- When you are on a page in Project Builder (see sections on editing a project/adding pages in builder if you are not sure of where you should be), click and expand the "**New**" tab on the left side. The instructions question type is housed in the third section.
- Click on the type of question you want to add and you will be prompted to type in your text.
- Click "**Ok**" to create the question.
Multiple Choice
- Single Select
- Dropdown
- Multiple Select
- Ranking

Text Entry
- Textbox
- Multiple Textbox
- Sum

Matrix
- Matrix
- Dual Matrix

Other
- Instructions

Complete Question
- Question Bank
- My Projects
Question Types - Matrix Questions

Matrix questions are handy to use when you have a series of questions that have the same answer options.

To add matrix questions to your survey:

- When you are on a page in Project Builder (see sections on editing a project/adding pages in builder if you are not sure of where you should be), click and expand the "New" tab on the left side. The matrix questions are housed in the fourth section.
Click either "Matrix" or "Dual Matrix" (outlined below) and you will be prompted to type in the matrix general question text, questions, answers for your matrix. There will be a small dropdown at the bottom of the matrix creation window, where you will be able to select the type of matrix you want to create.

Matrix Question Text: This is the introductory text for the matrix, where you can provide instructions or context for the question set (e.g., Please indicate you level of agreement with the following items:).

Questions: These are the actual question items that you want to ask (e.g., I know the element of an effective resume).
Click "Ok" to create the matrix.

Listed below are all the matrix question types available for you to use in builder.

**Single Select**: Default/most common method; allows one answer per question/row.
Please indicate your level of agreement with the following statements:

Strongly agree
Moderately agree
Neither agree nor disagree
Moderately disagree
Strongly disagree
Unable to judge

My RA was attentive to my/the hall's needs.

My RA planned community activities.

I feel like I could talk to my RA about anything.

**Multiple Select**: Allows multiple answer per question/row; you may adjust the minimum/maximum number of answers that can be selected in each row.
On what days of the week do you participate in the following activities? (Check all that apply)

Multiple Textbox: Provides text boxes for each answer option in each row.

Multiple Dropdown: Similar to the single-select matrix, except that answers are selected from a drop-down menu.
Dual Matrix: Same as a regular matrix, except that two matrices are presented side-by-side. This is useful when you are seeking different pieces of information about the same questions/items (e.g., "For the following programs, please indicate how important it is to have the following facilities at Hometown U, and also indicate on which days you use these facilities:"). You may customize the type of matrix for each set of answers (e.g., importance may be a single-select matrix, but which days would be multiple select).
Page Properties

To navigate to the page properties page:

- When on a page, click on the "page properties" button (icon with a pencil writing on a piece of paper).

- Next to the "page properties" button is the "shuffle questions" button (crossing arrows icon): This will randomize the order of the questions on the page. To enable shuffling, click "On" at the top of the Shuffle Questions window. You may exclude specific questions from the shuffle, if you want them to remain in their positions. To do so, select those questions in the Shuffle Questions window, and they will remain in their positions.

Here you can edit a few things:

**Page Title**: If it is your project's first page, you can enter the title of your project. Otherwise, feel free to input a heading that will display on top of the page.

**Show Back Button** (not present on page 1 of survey): This checkbox displays for every page except page one. Checking this button allows a respondent to return to a previous page.

**Skip To** (not present on last page of survey): Covered in the Display Rules/Skip Logic section, this allows you to select the *next page that will display* when taking the survey. This will not be present on the last page of a survey.

**Display Logic** (not present on page 1 of survey): Covered in the Display Rules/Skip Logic section, you can set conditions for the page to display if certain answers are selected in a previous question(s).
Page Properties

General  Skip To  Display Logic

Page Title

☑ Show Back Button

Ok  Cancel
Previewing a Project

We recommend previewing the project before administering the survey in order to see how it looks in its final format.

You can preview the project while building or after you’re finished building to see how the project looks, overall, without data being collected. Previewing a project is a great way to take the survey to see how it looks in its final format, including any display rules, skip logic, shuffling, etc.

Just click on the "Preview" button to begin previewing the survey.

There are three areas where you can access a preview of your project:

1. Project Dashboard
2. Page Sorter/Project Overview Page
3. Page in Project

Self-Service Builder Project

1. Welcome!

The Orientation Team would love if you could take approximately 5 - 10 minutes to take this quick survey regarding your experiences during Orientation Week. We want to hear about what you liked and didn't like about orientation. Your voice matters!
Making Survey Questions Required or Optional

There is an easy way of setting a whole survey to be either REQUIRED or OPTIONAL instead of going into every question and checking or unchecking the "Required" textbox (text boxes are optional by default, so if you wanted them to be required, you would have to go into each one individually). Setting all questions to "Optional" can be especially handy if you are building your own survey from which you will manually enter data.

- When on the page sorter/overview view in editing, you will see a button with checkmarks on it.

- Click on that icon to bring up a window where you have the option of making all questions on the survey required or optional.
Set All Required/Optional

Set all existing questions in the project to be:

- **Required**
  - Each question must be answered

- **Optional**
  - Each question can be skipped

⚠️ **Warning:** This cannot be undone.
Specific minimum or maximum selection settings may be removed. Questions added afterwards are not affected.

[Cancel]