



Retention Data Center Quick Start – Survey Customization

Place your order!

Once your order is placed, RNL's team will setup your survey administration and send you a confirmation email containing next steps and survey details within 5 business days.

- For a new client, we will setup a basic shell without any customization.
- For our returning clients, we will replicate your customization from your last administration

Once you have received your confirmation email with next steps and survey details from StudentSuccessTech@RuffaloNL.com, you are free to log into the Retention Data Center and update the customizable pieces. If you don't wish to add any customization or want the same as last time, you are set to launch.

Your customizable options include:

- Survey name
- Survey end date
- Expected student count
- Allowing students to see their student report (the default is no)
- Campus-defined supplemental fields. Add additional demographic fields (i.e., major, advisor, residence hall, etc.) These fields can be used later for filtering purposes.
- Restricting reports so certain individuals can login to the system and only see students that are assigned to them (often used for advisors so they only see their advisees).
- Campus-defined questions. Custom questions allow you to gather additional information about your students (i.e., demographic or motivational). The question must be multiple choices in which the student selects one response. Sample custom questions can be found within the [HOW TO](#) section of the Retention Data Center.
- Identify Campus-specific resources/referrals for the Student Report (not applicable on the MYSA survey). Include campus resource and referral information with the existing Student Report's interpretive text. Sample referral text can be found within the [HOW TO](#) section of the Retention Data Center.

Tutorial

We have a tutorial in PowerPoint view. Just open the [link here](#) and start presentation view!

For questions or concerns, check out the [HOW TO](#) section of the Retention Data Center or email StudentSuccessTech@RuffaloNL.com. We will answer any questions we can via email or we are happy to schedule some time to chat to walk you through any questions you might have.

Logging into the Retention Data Center

1. Login at www.RuffaloNL.com/myRuffaloNL, and access your myRuffaloNL account. Enter your email address and your password. Click 'Forgot your Login' if you need your password. To change your password, click on Change Password at the welcome screen.
2. Select Retention Data Center from the box titled my Applications.
3. Click OK at the FERPA notification.

Customizing Your Survey



At the action column. Any changes will be saved with the click of the next button.

1. Update your basic survey information
 - a. Survey Name = Something you will easily recognize this group of students. Note, the name is included in the URL
 - b. Description = optional, but does allow you to add a bit more information (this is the only area you will see this description)
 - c. Language = update if needed.
 - d. Survey URL = this is the generic link you can provide to your students to complete the survey. Nothing else is required for your students to take the survey.
 - e. Survey End date = the last date students can access the survey. You can update this date as needed and you can access reports at any time (the survey does not need to be closed to access reports)
 - f. Expected Student Count = how many students do you anticipate completing the survey (your completion rate is figured based on this number, but it can just be an estimate)
 - g. Students can view report: Do you want your students to see their report immediately upon completing the survey?

Click 



If you are updating a Mid-Year Student Assessment (MYSA) – you will be asked what CSI administration this MYSA should be tied to.

2. Determine the use of grouping fields.
Select optional grouping field(s) if you want to capture additional demographic data. These field(s) can be used later for filtering purposes. Examples include, but are not limited to: Advisor, Major, Course Section etc.

| Item | Selection | Grouping Field Name |
|------|--------------------------|--|
| 1 | <input type="checkbox"/> | Custom Grouping 1 (Previously named Major) |
| 2 | <input type="checkbox"/> | Custom Grouping 2 (Previously named Entry Term) |
| 3 | <input type="checkbox"/> | Custom Grouping 3 (Previously named Advisor) |
| 4 | <input type="checkbox"/> | Custom Grouping 4 (Previously named Custom Grouping) |
| 5 | <input type="checkbox"/> | Custom Grouping 5 (Previously named Course Section) |

Students will either select from the response fields you provide (step 4) or you may choose to pre-assign response fields by including them in the designated area of the student access file.

If you do not wish to use grouping fields, leave all deselected.

Click 



**Not grouping?
Go to Step 5**

| Item | Field Name | Display Name (for this survey) | Show on Survey? | Assign Security | Configuration Action |
|------|-------------------|--------------------------------|--------------------------|--------------------------|---|
| 1 | Custom Grouping 1 | Major | <input type="checkbox"/> | <input type="checkbox"/> | Survey Response Options |
| 2 | Custom Grouping 2 | Course Section | <input type="checkbox"/> | <input type="checkbox"/> | Survey Response Options |
| 3 | Custom Grouping 3 | Advisor | <input type="checkbox"/> | <input type="checkbox"/> | Survey Response Options |
| 4 | Custom Grouping 4 | Custom Grouping 4 | <input type="checkbox"/> | <input type="checkbox"/> | Survey Response Options |
| 5 | Custom Grouping 5 | Custom Grouping 5 | <input type="checkbox"/> | <input type="checkbox"/> | Survey Response Options |

3. Configure your grouping fields

- Use Display Name (just click and type) to update the name of the grouping field for how you plan to use it. Example: Change Custom Grouping 1 to Major.
- Use [Survey Response Options](#) to enter a list of choices students can select from when completing the survey. If loading a student access file, your survey response options can be included as part of the file upload and do not need added in this step.
- Determine if you would like the grouping questions to display on the survey. Check all those that apply (Show on Survey?). If you don't select this, you should plan to upload this information in your student access file.
- Determine if you would like to assign access to reports based on a grouping field. Check all those that apply (Assign Security).

Note: This feature allows the individuals with the Limited /Global roles to login and view student records **only** associated to their assigned grouping response (a common example is advisors logging in to access reports for **ONLY** their advisees).

Click **NEXT**
Not limiting access? Go to Step 5

4. Assign Security

- Open each grouping you have selected to 'assign security' by clicking on the grouping field name.
- Select Assign User and associate the login that should have access to the corresponding grouping response (for additional detail see the Retention Data Center documentation titled *Securing Access of Campus Colleagues*).

Click **NEXT**

- Determine if you want to add text to instruct students of format or preferences of Student Identification number and e-mail address.

Examples:

Student ID Instructions:

Email Instructions:

Student ID Instructions: Please include your 6 character Student ID with leading letters. 'NL 1234'
 Email Instructions: Type in your school e-mail samplestudent@college.edu

After your text has been entered, select preview and scroll down. You can see exactly how your text appears on the login page of the survey.

Click

NEXT

- Determine the use of custom questions. Use these to gather additional information about your students. Click 'Yes' and next if you wish to add questions. Place a checkmark by the questions you would like to include in this administration.

Note: Additional questions must be added through Configuration to appear on this list. Once a question(s) is added, always be sure to include it in the survey administration through the Edit Survey feature.

Below are campus-defined questions already created in your account; select any or all of these to include in this survey administration.

To add additional campus-defined questions use *Configuration*. To add additional questions you will leave the Survey Wizard, saving your choices to this point. Once additions are complete, continue your survey set up within Surveys by selecting *Edit Survey* under Actions.

| Item | Include this question in this survey administration | Question Text | Description | Details |
|------|---|-------------------------------|-------------|---------|
| 1 | <input type="checkbox"/> | Campus custom question 1 here | 1 | |
| 2 | <input type="checkbox"/> | Campus custom question 2 here | 2 | |

If you wish to have your custom questions appear in a specific order at the end of all standard survey items, you may do so by selecting **SEQUENCE CUSTOM QUESTIONS**. Use the up or down arrows to rearrange placement. Once complete, select Submit.

Click

NEXT

- Determine the use of campus-specific resource and referral information for the student report. Click Yes and add your desired text. The text will appear as the leading paragraph under each the general categories listed on the written interpretation of the Student Report. Up to 1000 characters are permitted in each category (500 for SYSA).



Campus-specific resources cannot be added to the MYSA.

Click

NEXT

to complete and review your survey administration set up.

Your survey is now setup! From here, you can:

- Make additional edits to your survey (select Edit Survey from the dropdown menu on the SURVEYS button).
- Preview your survey. This allows you to take a look at exactly how the survey.
- Distribute the survey using the link provided (survey URL).
- Upload a student file (see the IMPORT DATA button for more information) – know that you can upload this file as many times as needed before, throughout, or after your survey
- Email invitations/reminders to your students through the Retention Data Center (if you have uploaded a student file).

For more information, on your survey implementation, see the following webpages:

- [Planning and Implementing Your Survey](#)
- [Retention Data Center Documentation](#)
- [Reviewing Your Results](#)
- [Sharing Your Results](#)