

# Create and Maintain Questionnaires

## Create and Maintain Questionnaires

The objective of this document is to provide basic steps for questionnaire creation and maintenance.

### Security Role

- Case Management Administrator
- HR Administrator
- Knowledge Base Content Administrator
- Learning Administrator
- Questionnaire Administrator
- Recruiting Administrator
- State Recruiting

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### Create New Questionnaire

1. Search for and select the **Create Questionnaire**.
2. Select **Create New Questionnaire**.
3. Enter name of new questionnaire. Follow recommended naming guidelines.
4. Click **OK**.
5. Select the **Edit Questionnaire Details** button.
6. Set a Questionnaire Display Name, if different than Questionnaire Name.
7. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
8. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
9. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
10. Click **OK**.
11. Select the **Maintain Questions** button.
12. Choose **+** to insert a question.
13. Use **Order** arrows to move question order.
14. Select an existing question or choose to **Create Question**. (See Create Question section)
15. Click **Required** checkbox, if appropriate.
16. Repeat steps 12 -15 until all questions are entered.
17. Click **OK**.
18. Expand the questionnaire in the display on left hand side of screen. Use the **>** to expand each question for review.

## Create and Maintain Questionnaires

19. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

### Copy Existing Questionnaire

20. Search for and select the **Create Questionnaire**.
21. Select **Copy Existing Questionnaire**.
22. Use prompt to locate the name of questionnaire to be copied.
23. Enter name of new questionnaire. Follow recommended naming guidelines.
24. Click **OK**.
25. Select the **Edit Questionnaire Details** button.
26. Set a Questionnaire Display Name, if different than Questionnaire Name.
27. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
28. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
29. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
30. Click **OK**.
31. Select the **Maintain Questions** button.
32. Choose **+** to insert a question.
33. Use **Order** arrows to move question order.
34. Select an existing question or choose to **Create Question**. (See Create Question section)
35. Click **Required** checkbox, if appropriate.
36. Repeat steps 12 -15 until all questions are entered.
37. Click **OK**.
38. Expand the questionnaire in the display on left hand side of screen. Use the **>** to expand each question for review.
39. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

### Edit Questionnaire

40. Search for and select the **Create Questionnaire**.
41. Select **Edit Existing Questionnaire**.
42. Use prompt to locate the name of questionnaire to be edited. Only those NOT in use are available to edit.
43. Click **OK**.
44. Select the **Edit Questionnaire Details** button.
45. Set a Questionnaire Display Name, if different than Questionnaire Name.
46. Indicate the **Type(s)** of questionnaire. This controls where the questionnaire is available for selection.
47. Complete the **Allowed on Business Processes** section. This controls where the questionnaire is available for selection.
48. Enter **Questionnaire Instructions** to be provided to the user when receiving the questionnaire.
49. Click **OK**.
50. Select the **Maintain Questions** button.
51. Choose **+** to insert a question.
52. Use **Order** arrows to move question order.
53. Select an existing question or choose to **Create Question**. (See Create Question section)
54. Click **Required** checkbox, if appropriate.
55. Repeat steps 12 -15 until all questions are entered.
56. Click **OK**.

## Create and Maintain Questionnaires

57. Expand the questionnaire in the display on left hand side of screen. Use the > to expand each question for review.
58. Select the **Preview Questionnaire** button to preview what the actual questionnaire will look and behave like.

### Delete Questionnaire

59. Search for and select the **Delete Questionnaire** report.
60. Use prompt to select Questionnaire to delete. Only questionnaires that have NOT been used are available to delete.
61. Click **OK**.
62. Select the **Delete Questionnaire** button.
63. Click **OK**.

### Create New Question

64. Use **Find Questions** search to determine if the question already exists.
65. **Create Question** task can be accessed in the Create Questionnaire task or as a stand-alone task by using Search.
66. Enter a **Question Name**. This should be a short but descriptive indicator of question content.
67. Enter the **Question Body**. This is the actual question that will be presented to the user.
68. Select a **Question Type**. Once selected, this cannot be changed.
  - a. Date.
  - b. Multiple Choice – Multi Select (Between 2 and 25 responses).
  - c. Multiple Choice – Single Select (Between 2 and 25 responses).
    - a. Use this option if you will have multiple branching questions.
  - d. Number.
  - e. Text.
  - f. Upload Attachments.
69. Select **Question Tags** to help future grouping and searching.
70. If you selected either Multiple Choice option, use + to insert a row for each **Possible Answer**.
71. If this question will be scored, enter the **Score** for each response.
72. Click **OK**.

### Create and Maintain Question Tags

73. Search for **Maintain Question Tags**.
74. Use + to insert row for new tag values.
75. If a tag has not been used, use – to remove the tag value.
76. Update description of tag, if needed. The updated tag name will be attached to any existing usages.

### Maintain Questionnaire

77. Search for and select the **Maintain Questionnaires** task.
78. Select the **Questionnaire Types** that are applicable for the questionnaire.
79. Select the **Allowed on Business Processes** that are applicable.
80. View the **Usage** field to understand if the questionnaire has been used and how many times.
81. Check the **Inactive** checkbox to remove this questionnaire from future usage.
82. Click **OK**.