

# Surveys

Surveys can be created that appear on the patron registration/edit page for a branch or system. The Voter Registration question is an example of a survey that appears on all patron accounts for all locations.

## Creating a New Survey

1. Go to **Administration > Local Administration > Surveys**.
2. Click the **Add New Survey** button. A popup will appear:
3. Fill in the form.
  - **Description:** A description about what the survey is/is for. (This must be filled in upon creating the survey, or the survey will fail to save.)
  - **Display in User Summary:** This is a placeholder for future development and does not currently do anything.
  - **Is Required?:** This will require an answer every time the patron account is updated.
  - **Name:** The name of the survey.
  - **OPAC Survey?:** This is a placeholder for future development and does not currently do anything.
  - **Owning Library:** Your branch or system.
  - **Poll Style:** This is a placeholder for future development and does not currently do anything.
  - **Survey Start Date/Time:** Required. It must begin at least 24 hours later.
  - **Survey End Date/Time:** Required. It must be after the survey start time.
4. Click **Save**.

End Survey Now

Record Editor: Survey

Name	Voter Registration
Description	Patron voter registration survey
Owning Library	PINES
Survey Start Date/Time	09/03/2006 00:00
Survey End Date/Time	09/03/2036 00:00

OPAC Survey? ☐

Poll Style? ☐

Is Required? ☐

Display in User Summary ☒

Save

5. The screen will refresh. You may need to sort by Survey Start Date or Owning Library to find the new survey you have created. Double-click to open it.
6. Click on the **Questions and Answers** tab.

7. Type in your question and click **Save Question & Add Answer**.

8. Enter each option answer and click the **Add Answer** button after each one.

9. The survey will appear at the bottom of the patron registration / edit form once the start date arrives.

## Ending a Survey

- Go to **Administration > Local Administration > Surveys**.
- Select the survey you want to end, and from the actions dropdown, click **End Survey Now**.

#	Description	Survey End Date/Time	Survey ID	Name	OPA Surveys	Actions
1	Test of sur...	03/19/2008	68	Survey Test	Yes	<div> <div>1 selected</div> <div> Delete Selected  Edit Selected  <b>End Survey Now</b> </div> </div>

3. Or, double-click on the survey in the grid to open the survey form and click **End Survey Now**.



The system will not allow the deletion of a survey if a response has been recorded on a patron's account. Ending the survey will effectively remove the survey from patrons' accounts.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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Last update: **2024/02/19 13:52**

