# Table of Contents

**QMI: BATCH PAGE** ................................................................................................................ 3

- Logging in to the Questionnaire Management Interface ......................................................... 4
- Searching for Existing Batches ................................................................................................... 5
- Creating a New Batch .................................................................................................................. 6
- Editing / Reviewing a Batch ......................................................................................................... 7

**Batch Details Page Overview** .................................................................................................. 8
- View Questionnaire Submissions .............................................................................................. 9
- Allowing/Disallowing a Submission ............................................................................................ 9
- Viewing Submitted Information ............................................................................................... 9

**Adding New Additional Questions** .......................................................................................... 10
- Adding Answers to Questions .................................................................................................... 10

**Copying Additional Questions from an Existing Batch** .......................................................... 10

**Reviewing the Questionnaire** .................................................................................................. 11
- Parts of a Questionnaire Page ................................................................................................... 11
- Providing a Questionnaire Link to a Participant ....................................................................... 12

**Viewing and Printing Questionnaires** ..................................................................................... 14

**SPECIAL NOTES FOR MOZILLA FIREFOX USERS** ............................................................... 15

**INTERNET EXPLORER 7 SECURITY SETTINGS** ..................................................................... 17
QMI: Batch Page

Purpose

The Batch page gives users the ability to create, review, and submit batches. This section is intended for school coordinators who are responsible for the questionnaire system at a school.

Batch Defined

A “batch” refers to a group of questionnaires to be completed by a group of survey participants (e.g., all students graduating from a school at the end of a specific semester).

Elements of this Section

- Logging in to the Questionnaire Management Interface
- Searching for Existing Batches
- Creating a New Batch
- Editing/Reviewing a Batch
  - Batch Detail Page Overview
  - View Questionnaire Submissions
  - Adding New Additional Questions
  - Copying Additional Questions from an Existing Batch
  - Reviewing the Questionnaire
- Viewing and Printing Questionnaires

Special note for Firefox users

While this manual assumes use of the Internet Explorer 7 web browser, the application also works for users of Mozilla Firefox. A special section has been included on pages 15-16 to help Firefox users with issues specific to their browser, such as pop-up blockers and printing.
Logging in to the Questionnaire Management Interface

As an administrator, you must log in to the system. Using either the Internet Explorer 7 or Firefox Web browsers, go to https://atsqmi.ats.edu. The following page displays:

Enter the username and password ATS gave to you, and click Login. You will see the basic application navigation along the left-hand side of the page.
Click the expand icon circled above, and click the **Batch** menu item.

The Batch page displays (Organization-specific data has been hidden.):

![Batch page screenshot](image)

**Searching for Existing Batches**

The drop-down lists on the Batches page allow you to filter your search. Select filters and click the Search Batches icon.

Any batches meeting the search criteria will be listed in a manner similar to that shown below:
Creating a New Batch

To create a new batch, click the Create a New Batch icon found in the upper right-hand corner of the page. The Batch Details page displays.

![Batch Details](image)

This page has several fields, which are described below:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>This is a read-only text field.</td>
</tr>
<tr>
<td>Questionnaire Type</td>
<td>This is a <strong>required</strong> drop-down list.</td>
</tr>
<tr>
<td>School Year</td>
<td>This is a <strong>required</strong> drop-down list that identifies the school year of the new questionnaire batch.</td>
</tr>
<tr>
<td>School Term</td>
<td>This <strong>required</strong> drop-down list sets the term to the whole year, fall, winter, spring, or summer term.</td>
</tr>
<tr>
<td>Number of Questionnaires Expected</td>
<td>The number of people who will be invited to participate in this questionnaire batch. This is also a <strong>required</strong> field.</td>
</tr>
</tbody>
</table>

Once data has been entered, the new batch is ready to save. You can click the **Save and Return to Previous Screen** icon to save the batch and go back to the Batches page or click the **Apply Changes** icon to save the batch and then continue to edit it (see Editing/Reviewing a Batch section).
Editing /Reviewing a Batch

To edit the details about a batch, navigate to the batch by searching for it as described in the Searching for Existing Batches section above. Click the batch’s edit icon or continue working on a new batch by clicking the Apply Changes icon. (See the Creating a New Batch section above). The Batch Details page displays:
Batch Details Page Overview
The Batch Details page provides information, editable fields, and action icons pertaining to a batch. In the upper right-hand corner are several icons: Save and Return to Previous Screen, Apply Changes, and Cancel. Other fields and icons are described in the table below, and more detailed explanations of certain functions are in the sections that follow.

<table>
<thead>
<tr>
<th>Field/Item Name</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>This read-only field lists the school for which this batch is associated.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the batch. Valid statuses are: Open, Reopened, or Submitted.</td>
</tr>
<tr>
<td>Questionnaire Type</td>
<td>This read-only field displays the type of questionnaire this batch is based upon.</td>
</tr>
<tr>
<td>Submit Batch Icon</td>
<td>To submit a batch of questionnaires to ATS, click the icon.</td>
</tr>
<tr>
<td>School Year</td>
<td>This is a read-only field displaying the school year this batch is based upon.</td>
</tr>
<tr>
<td>School Term</td>
<td>This is a read-only field displaying the school term this batch is based upon.</td>
</tr>
<tr>
<td># of Questionnaires Expected</td>
<td>This editable text field shows the number of people invited to take the questionnaire. This field can be edited if the number of expected participants changes before it is submitted.</td>
</tr>
<tr>
<td># of Questionnaires Started</td>
<td>This field lists the number of questionnaires started by participants.</td>
</tr>
<tr>
<td># of Questionnaires Completed</td>
<td>This field lists the number of submitted questionnaires that meet the percentage-of-completeness requirements.</td>
</tr>
<tr>
<td>Launch Questionnaire</td>
<td>This hyperlink will launch the opening page of the Questionnaire. Details of reviewing a questionnaire are explained in the Reviewing the Questionnaire section of this document.</td>
</tr>
<tr>
<td>View Questionnaire Submissions</td>
<td>This hyperlink will open the Questionnaire Submissions page. This page is explained in detail in the View Questionnaire Submissions page section.</td>
</tr>
<tr>
<td>Add New Additional Question</td>
<td>This hyperlink will begin the process of adding a new custom question to this questionnaire. This process is explained in greater detail in the Adding New Additional Questions section.</td>
</tr>
<tr>
<td>Copy Additional Questions from a Previous Batch</td>
<td>This hyperlink will begin the process of adding custom questions used in a previous batch to this questionnaire. This process is explained in greater detail in the Copying Additional Questions from an Existing Batch section.</td>
</tr>
</tbody>
</table>
**View Questionnaire Submissions**
To view questionnaire submissions, navigate to the Batch Details page and click the View Questionnaire Submissions link. All the questionnaires that have been submitted so far display:

![Questionnaire Submissions Table](image)

**Allowing/Disallowing a Submission**
To change the status of a submission to disabled, click the green checkmark in the Allow Submission column of a submission listing. Click on the red X to enable it. Some examples of when you would want to disable a submission are to remove:

- questionnaire responses that you created while reviewing the questionnaire via the Launch Questionnaire link.
- questionnaires that appear to be invalid or that contain inappropriate data.

**Viewing Submitted Information**
To view submitted responses, click a name in the User Name column. A report that displays all submitted responses for that participant opens. An example is shown below:

![Submitted Information](image)
For more information on viewing and printing questionnaires, see the **Viewing and Printing Questionnaires** section. *(Note: if you are using Firefox, you may receive a “pop-up blocked” message attempting to open the above page. If so, see the **Printing a Questionnaire Using Firefox** section for more information).*

**Adding New Additional Questions**

Schools have the option of creating up to five custom questions to include in a standard questionnaire. These questions appear after the last standard question and will be indicated by an “A” prefix on the question number.

To add a new question, click **Add New Additional Question** on the Batch Details page. This will open the question text panel, as shown here:

![Question Text Panel](image)

Enter the text of the new question. Click the Save and Return to Previous Screen icon to save your changes. The Batch Details page displays with the new question listed.

![Save and Return to Previous Screen Icon](image)

**Adding Answers to Questions**

To add possible answer choices for a custom question, click **Add/Edit Answers** for a question. That question’s “answer panel” displays. If no answers have been created for this question yet, only the **add new answer** link will be visible. Otherwise, existing answers will be listed, with an edit icon beside them. Click **add new answer** to open the “Answer Text” panel. Type the answer, and click the Save and Return to Previous Screen icon to return to the list of answers. Repeat this process as needed for each answer.

**Copying Additional Questions from an Existing Batch**

If you would like to use questions and answers from an earlier batch in the current batch, click **Copy Custom Questions from Previous Batch** on the Batch Details page. A drop-down list containing any prior batches of the same type that have additional questions displays. Select one of these batches. The additional questions for that batch display below the drop-down list. If these are the questions you want to copy, click **Copy Additional Questions from Selected Batch to Current Batch**. This will copy the questions and answers to the new batch. They can then be edited for the new batch.
Reviewing the Questionnaire

From the Batch Details page, click **Launch Questionnaire** to access the opening page of the Questionnaire:

Enter your name (or leave it blank—results will display as “Anonymous” in this case), and click **Begin**. The participants’ view of the questionnaire displays.

Parts of a Questionnaire Page

All of the questionnaire pages have a similar appearance, with the following components:

- A **question** and its **answers**. Note that some pages may contain multiple questions.
- A **scroll bar** appears for pages with questions and answers that do not fit on a single screen. Be sure to scroll through all of the questions and answers on those pages.
- A vertical **progress bar** displays the percentage of questions that you have answered.
Several Navigation Tools are available for navigating through the various question pages:
  o Click Next to save your answers on that page and move to the next page of questions.
  o Click Previous to go back to the previous page.
  o Select a page number from the drop-down list to go directly to a specific question page.
  o A Finish button will appear on the final page of questions. Click that button to save all of your answers. Note that you will not be able to change any answers once you click that button.

Use the Navigation Tools to review the pages of the questionnaire. Use the drop-down box to go directly to a specific page. Close the browser window once you have finished previewing the questionnaire.

**Providing a Questionnaire Link to a Participant**
Providing the questionnaire link to a participant is a manual process. The steps below use standard copy and paste procedures for the Windows operating system and Microsoft Internet Explorer 7. These steps can be easily adapted to other operating systems, web browsers, or e-mail programs.

Click Launch Questionnaire on the Batch Details page. This will cause the opening page of the Questionnaire to appear in a new browser window.

Next, highlight the URL by double-clicking on the URL in the browser. Its text should be highlighted, as shown in this example:
Then, with the cursor over the highlighted text, right-click the text and choose **Copy** from the menu that appears:

Lastly, open a new e-mail message. Right-click in the body of the message, and choose **Paste** from the menu that appears.

This message should contain all information necessary for the completion of the questionnaire, including but not limited to:

- a reminder for students to turn off popup blockers, and
- the actions (if any) that the school plans to take to encourage completion of the questionnaire.
**Viewing and Printing Questionnaires**

Navigate to the same page, and click on a batch’s Edit icon 📝 to view the batch details. On the next page, click **View Batch Details**. The list of submissions will appear. Click on a participant’s name. A report of that person’s submissions displays.

![Screenshot showing the report viewer interface](image)

This application uses its own interface for printing. Therefore, you should not use your browser’s print button for printing the report; using that button only prints the first page of the questionnaire.
Special Notes for Mozilla Firefox Users

Pop-Up Blockers
You may receive a “pop-up blocked” message when attempting to open a questionnaire.

To view the questionnaire, click on the Options button, and then choose Allow popups for [website name].

Viewing and Printing Questionnaires
In Firefox, there is no print icon on the screen (as there is in Internet Explorer 7). Instead, you should use the report manager to create a PDF file, and then view that file using Adobe’s Acrobat Reader program. You can print the file from there.

Note: These instructions assume that Adobe’s Acrobat Reader has been installed onto your computer. If not, you must download and install the reader program, which is available for free at http://www.adobe.com/products/acrobat/readstep2.html.
Use the following steps for printing a questionnaire:

1. Click the arrow for the **Select a format** drop-down list, and select **Acrobat (PDF) file**.
2. Click **Export** on the toolbar at the top of the screen.
3. If you receive a message asking whether to open or save the file, select **Open**. Also, if a message displays asking which program to use to open the file, select **Adobe Reader**.

![Image of software interface]

The file will open in a new browser window. Use the **Print** button or navigate to **File | Print** in that window to print the file.
Internet Explorer 7 Security Settings

If you are using Internet Explorer 7, you may have difficulty viewing some pop-up screens in this application, depending on the security setting of your browser.

To ensure the application loads properly, it must be designated as a “trusted site”. This section will explain how to make this setting change.

Open Internet Explorer 7. Click on the Tools icon and choose Internet Options.
Next, click the **Security** tab. The following options screen will display:
Select the Trusted sites Web content zone and click Sites:

![Internet Options window](image)

Enter the hyperlink of the ATS application you are using (in the example below, “https://atsqmi.ats.edu” is used) into the Add this Web site to the zone: box and click Add. Uncheck the Require server verification (https) for all sites in this zone box.
Click **OK**. The following page displays:
Click **Custom Level**. This page displays:

![Security Settings](image.png)

Scroll to the **ActiveX controls and plug-ins** section and click the **Enable** option for **Download signed ActiveX controls**. Click **OK** several times to save your changes.