Social Embeddedness Partnership Survey POC Cheat Sheet

1. **Login to the Social Embeddedness Survey Management Portal**

Go to community.asu.edu, click on “Annual Survey” in the top menu bar. Click on “Point of Contact”

Login using your ASURITE credentials. Once you are in the portal, you will notice that courses and programs (separated by tabs) are ready to be viewed. (Note that there is nothing in the delegate field and all courses are in a “Not Started” status, which indicates that you have yet to delegate these records this year.)

![Portal Screenshot](image)

2. **Review surveys and A) Inactivate, B) Complete, or C) Delegate**

A) **Inactivate** a survey when it is not or will not be active in FY18 (July 2017-June 2018).

- Click on the name of the course/program to open the survey
- Click the “Inactivate” button at the top of the survey.

- You will automatically be re-directed back to the portal. Note that the status of the survey is now “Inactivated”

B) **Complete** a survey if you are already familiar enough with a course or program that you can complete the survey yourself.

- Click on the name of the course/program to open the survey
- Update the information in the fields if it has changed, and add information to the blank fields (these may be new questions, or data that need to be updated yearly)
- You may “Save as Draft” and return later or click “Approve” to complete the survey.

C) **Delegate** to the survey if you do not know enough about the program to update it.

- Click on the name of the course/program to open the survey
- Note last year’s delegate. Choose to Re-delegate the survey to this person, or change the delegate to someone new.

- Complete the fields with the delegate and basic program information and then click “Add Delegate” button at the bottom.
- You MUST send an email to your delegate in order to notify them of the survey. To do this, click on “Send e-mail to delegate” button.
Clicking this button will auto-generate an email template with a link to the survey that you can edit and send to your delegate through your own email.

- Return to the portal.

3. **Add new courses and programs that have not yet been added. (Delegate them as needed.)**
   - At the top of the portal, click “Add New Course or Program” to open a blank survey

   **Add New Course or Program**

   Fill out the Social Embeddedness Survey

   - Complete the survey. You may “Save as Draft” and return later or click “Approve” to complete the survey.

4. **Manage delegate survey completion**

   Once your delegates receive their notification, they will (hopefully!) open the survey and complete it. However, you will ensure this by monitoring the statuses of the surveys in your portal. Each status will signal that a different action is necessary from you as the survey liaison for your college/unit.

   **Not Started:** A survey that remains in this status signals to you that the survey has neither been completed by you (the POC) or been delegated for someone else to complete.

   **Delegated:** A survey that remains in this status signals to you that your delegate has not begun to complete the survey yet this year. Check your email outbox to ensure that they were notified. If they were, follow-up with them to ensure they are aware of the survey and do not have any outstanding questions about what is needed.

   **Started:** A survey in this status indicates that the delegate has begun to complete the survey, but saved it to return later. As your internal deadline approaches, you may want to follow-up with delegates who have not completed their surveys.

   **Completed:** A survey in this status signals that it is now your turn to review the survey for quality and click “Approve” before the survey deadline (Friday, May 25th, 2017).

   **Approved:** A survey in this status the status to “approve”

   **Inactivated:** A survey in this status signals that you or the delegate has indicated that this program/course is no longer active. No action is needed.