

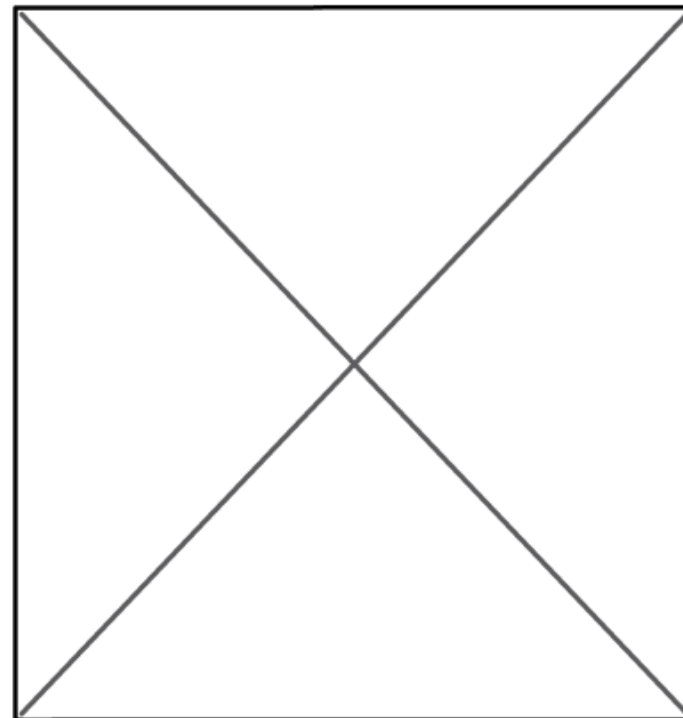


The leading choice for administering BASICS.

BASICS Feedback is a revolutionary web-based survey and feedback intervention platform designed by leading health professionals. Help streamline your data collection processes and generate better outcomes for your users.

CONTACT US

FREE TRIAL



Find out why more than 37,018 people use BASICS Feedback on a daily basis

Impact

Organization Logo

Welcome. Homer
Support Center

Welcome. Homer
Account Settings
Reset Password
Log Out

Page Title

- Classes
- Class Calendar
- Classes
- Class Templates
- Video Conferencing
- Conference Setup
- Conference
- Participant Information
- Participants
- Survey Sessions
- Survey Invitations
- Notification Log
- Announcements
- Templates
- Message Templates
- Report Templates
- Surveys
- Mobile Resources
- BAC Mobile
- Admin Features
- Account Settings
- Normative Items
- Organization
- Referral Codes
- Survey Data
- Users

Organization Details saved.

REST API interaction success and error messages appear in a simple floating DIV with a slight transparency. Success messages disappear after a few seconds.

Unsaved Changes

There are unsaved changes on this page.
What do you want to do?

Save

Discard

Cancel

Route Name	Description
menu items	returns menu items for logged in user
staff/resources	organization_logo_url
logout	destroys login token (and returns to login screen)

This popup appears when a user tries to navigate away from a page when there are unsaved changes on that page. If they click save, it saves the changes and then navigates. If they click discard, it discards the changes and navigates. If they click cancel or the upper right hand X, it cancels the navigation.

Welcome, Homer

Account Settings

Reset Password

Log Out

Contact Information

Username:

First Name:

Last Name:

Email:

Update Contact Information

Password

Your password has expired. Federal HIPAA regulations require that you change your password.

Password:

Confirm Password:

Weak

Update Password

Yes, the Account Settings and Reset Password both go to this same page. Users need a visible target from the header to know where to go to reset the password and manage their own user account settings. This makes it explicit.

password and confirm password must match.
password must be at least 8 characters, must have a number, must have an upper case and a lower case character, and must have no spaces. Punctuation such as !@#\$\$% is allowed.

Password must not have been used within 6 updates.

displays password strength using something like ng-password-strength.

Username:

Username is a required value. / That username is already in use.

First Name:

Last Name:

Email:

Save

Username is required and must be unique to the organization.

First name is a required value
Last name is a required value.
Email must be a valid email address and must be unique.

invalid fields turn red, and validation messages appear in red text below the field, and other elements slide down below.

Route Name	Description
users/id	returns user's data
users/id (PUT)	edits contact info but not password
users/id/password	edits the user's password

When a user's password has expired, no email notification is sent. When they login a message appears which indicates that their password has expired, as they are directed to this screen. They are not allowed to navigate off of this screen until they have successfully reset their password.

This is a sample email they would receive if their password was forgotten and needed to be reset.

webmaster@impactfeedback.org

To: Debbie Dumbass

Password Reset

Dear Debbie,

This is an automated message sent from impactfeedback.org

Click the link below to reset your password:
[impactfeedback.org/login_reset?pw=Q@S2S#d\\$%fG](#)

This link will only work for one hour.

Thank you,

Impact Feedback Webmaster
TOLL-FREE: 1.877.592.2972

Please do not reply to this email.
If you continue to have problems, please call the toll-free phone number listed above.

Log into your existing Impact Feedback account

Username:

Password:

Log In

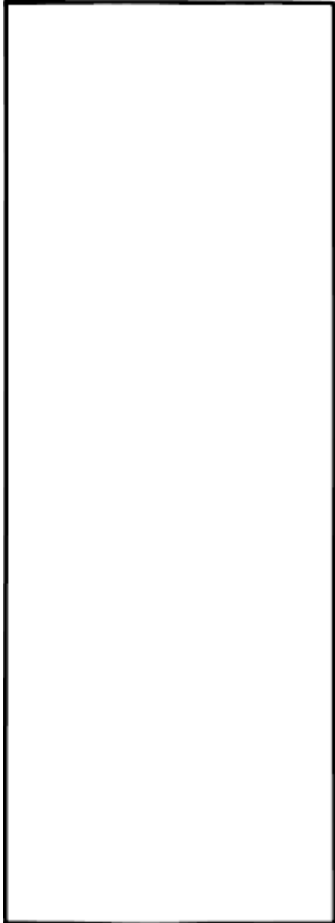
[I Forgot My Password](#)

If there is no login token, or if the token returns no match from the REST API, the user is automatically routed to this page.

Once logged in successfully, the system takes the user to the first page that they have permission to see.

privilege	route
general	
class	/staff/calendar
class template	/staff/classes/templates
message	/staff/message-templates

Route Name	Description
menu items	returns menu items for logged in user
staff/resources/org_url	organization_logo_url (returns it regardless of logged in, based on url prefix)
login	along with token and user info, returns a password_expired flag; if true, client side sends them to the user accounts password change page



Create a Free Account

Organization

First Name:

Last Name:

Email:

Username:

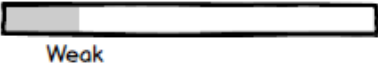
Password:

Password:

Create Account

Last Name:

- Password must be:
- 8 - 16 characters
 - have at least one uppercase letter
 - have at least one lowercase letter
 - have at least one numeric character



comes to this page from the splash page.

Once they create the account, it gives them a demo url prefix and logs them into that account.

It then takes them directly to the organization details page, and gives them the standard default sets.

Very Weak, Weak, Good, Strong, Very Strong,

Route Name	Description
staff/create_account	
staff/verify_email/email	
staff/verify_username/username	

Announcements

Upcoming Changes

We're excited to announce that we're making several new enhancements to the platform by Summer 2015. These updates include:

API - Ability to communicate securely with your BASICS Feedback data from within other applications.

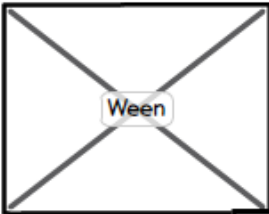
Video Conference and Chat - Engage with your participants on a one-on-one basis using video/audio and online hcat feature. You can even save the sessions for later viewing if the participant approves.

SMS messaging - Send out class reminders and scheduling updates via text messaging to your participants.

Status Updates - See when a participant is online and viewing a survey or feedback report in real-time.

WEEN - Marijuana Tracking App released for BASICS Feedback!

We're excited to release our new marijuana tracking app called WEEN. The app was designed to allow students or any user easily input in the frequency of marijuana usage and receive reminders on if their usage has



If there are announcements which have not been seen by the logged in user, this div appears over the page the user lands on after successfully logging in.

Announcements show that are unread by the logged in user, that are younger than the date sent by the client side programming, probably 2 weeks ago to perhaps a month ago.. If the user clicks the close window button or clicks outside of the announcements it marks all of the displayed announcements as read for that user.

Route Name	Description
announcements_unread/date	sends user_id via token and returns announcements on or after the given date
announcements_read	sends id's of all read announcements and marks them read for logged in user

Today

Month

Week

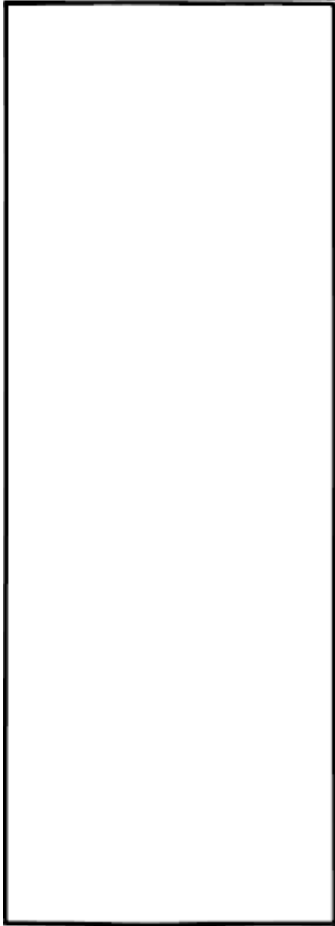
Day

30	31	1	2	3	4	5
6	7	8	9	10 	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Route Name	Description
classes/	gets classes within the given date range for the logged in user's organization
classes/id	gets class for the selected clicked on class from the calendar to pop up details

cursor becomes a pointer over the calendar; if clicked on a blank spot, a new add class popup appears for the date clicked. If clicked on an existing item, a popup appears to edit the class. If it is past the date for the class selected to edit, it is still editable

block.



Today

Month

Week

Day

	Sun 8/30	Mon 8/31	Tue 9/1	Wed 9/2	Thu 9/3	Fri 9/4	Sat 9/5
all-day							
6am							
7am							
8am							
9am							
10am							
11am							

cursor becomes a pointer over the calendar; if clicked on a blank spot, a new add class popup appears for the date clicked. If clicked on an existing item, a popup appears to edit the class. If it is past the date for the class selected to edit, it is viewable only but not editable.

Route Name	Description
classes/	gets classes within the given date range for the logged in user's organization
classes/id	gets class for the selected clicked on class from the calendar to pop up details

Today

Month

Week

Day

Sun 8/30

all-day

6am

7am

8am

9am

10am

11am

cursor becomes a pointer over the calendar; if clicked on a blank spot, a new add class popup appears for the date clicked. If clicked on an existing item, a popup appears to edit the class. If it is past the date for the class selected to edit, it is viewable only but not editable.

event description displays ellipsis if text is too long, hover shows tooltip with full description.

Route Name	Description
classes/	gets classes within the given date range for the logged in user's organization
classes/id	gets class for the selected clicked on class from the calendar to pop up details

beginning date and end date auto-populate to a heuristic value that will most certainly not require pagination. Probably 6 months ago to forever to the future.

If the class has already happened, the option to delete the class does not appear.

If it is still in the future, allow delete and unenroll all students and performs class actions for roster on a removal from class action.

Click the "Edit Selected" button to get the Edit Selected Classes popup div. Operations only effect selected classes within the current found set. If someone clicked "select all" it would only select all within the found set. If someone clicked "select all" and then typed a search string to narrow the found set, these edit operations would still only work on the selected items within the found set.

Route Name	Description
classes/	gets classes within the given date range for the logged in user's organization, fields
classes/id	gets class for the selected clicked on class from the calendar to pop up details
classes-export/pdf	sends list of id's, selected columns, & sort order, and returns pdf
classes-export/csv	sends list of id's, selected columns, & sort order, and returns csv
classes-export/excel	sends list of id's, selected columns, & sort order, and returns excel
classes-edit	sends id_provider, id_template, [id_class,...]
classes-delete	sends [id_class,...]
classes-search	sends all the stuff in the picture

children records are deleted for each selected class and repopulated according to the class template. This includes prerequisites and actions

Really delete selected classes?

Are you certain?

This action is not undoable.

Really Delete Selected Classes

No!!! Cancel!!

Today and Forward

- All Dates
- Last 7 Days
- Last 30 Days
- Next 7 Days
- Next 30 Days
- Prior 6 months
- Prior 12 Months

- Add advanced search;
- quick search searches either course, name or date
- default found set is today forward, loads 100 and dynamically loads records as they scroll towards the bottom - called infinite scrolling
- export not supported for IE9 - show warning
- add show hide columns dropdown
- mockups need to include mag selector
- edit selected button disabled until more than one record is selected.
- popup single calls edit changes url so it can be copied and shared.

- ID - must match exactly
- Name, Location - matches beginning of text
- date - matches date range
- others - ID of entity

Choosing an option in the date dropdown auto-populates the dates the dates are editable afterwards, or can be directly edited to create a search.

If the "From" date is empty, it results in all records up to the "To" date. If the "To" date is empty, it results in all records from the "From" date forward.

Today and forward is the default setting.

The Provider select box is populated with all the providers that have been entered for the logged in school.

This is a popup div that can appear either over the class calendar page or the classes page.

12/1/2015

Start Date

10

:

30

AM

Start Time

11

h

00

m

Duration

Template

BASICS Session 1

* Course

BASICS 1

* Name

BASICS Session 1

* Location

Student Wellness Center

* Capacity

12

* Provider

Please Select...

Description

BASICS Session 1

Display Title

Custom

Repeats

Participants Can Remove Themselves

Yes

No

Repeats On

* Repeats Until

S

M

T

W

T

F

S

12/21/2015

* Required Fields

Save

Cancel

Class Name

Class Name / Provider First Name

Class Name / Provider Last Name

Class Name / Provider Full Name

Custom

view template, prerequisites and actions

Sends an array of full day of week names that were chosen for the repeat.

The other tab options do not appear on a new class until the details have been filled in and saved.

The course, name, location, capacity, provider, description, and remove flag all auto-enter from the template choice, but are editable thereafter.

Date defaults to the date which was clicked on from the calendar, but remains editable. The time, if coming from the month view, defaults to 9 AM, and defaults to the nearest 30 minutes that was clicked on in the week and day view. The default duration is one hour.

"Repeats" choosers show if it is unchecked, but are visibly disabled. Once checked, they become enabled. on mockups, use separate fields! date needs calendar picker hour and minute should be separate fields for start and duration

Details

Roster

Prerequisites

Actions

Roster

Add Student

Name	Status	Email	Attended	Remove
Austin Hellyer	Active	austin@bluscs.com	No	
Jim McNeely	Active	jim@bluscs.com		
Barry Tisdale	Active	barry@fake.com	Yes	
Betty McNeely	Active	betty@thereforenow.com	No	

Save

Cancel

data architecture note: the repeats functionality actually creates distinct new events. the class table records the event parent id, so that even if the parent id gets deleted, if future events get deleted en masse, they can be found by querying for those with the same iparent id.

Details

Roster

Prerequisites

Actions

Roster

Add Student

Q search

Signed Up	Name	Status	Email
<input checked="" type="checkbox"/>	Austin Hellyer	Active	austin@bluscs.com
<input type="checkbox"/>	Jim McNeely	Active	jim@bluscs.com
<input type="checkbox"/>	Barry Tisdale	Active	barry@fake.com
<input checked="" type="checkbox"/>	Betty McNeely	Active	betty@thereforenow.com

Save

Cancel

On save, if the student doesn't meet the prerequisite criteria, it hilites the row, and produces a hover note that indicates which prerequisite or prerequisites the student failed to meet.

Route Name	Description
classes/id	gets class for the selected clicked on class from the calendar to pop up details
class-create	sends all the stuff in the first picture

Send If and Schedule If have values culled from current database of options as distinct, and given understandable names.

Each has an option below all the others called "custom expression", which causes a textarea to appear below the option set so power users can enter a custom expression. Documentation for entering a custom expression will be provided in elsewhere than this form, in a power-user's instruction document.

Schedule If


Custom

Send If

Custom

If data has been migrated which does not correspond to one of the options, it displays the "custom" option and the expression appears in the field below.

If the logged in user has been selected as a superuser in the BluSky sysadmin section, this expression is editable. Otherwise it appears but is uneditable.



The Count selection only appears if they choose "absent" for the status.

These prerequisites are populated from the chosen Class Template, at the point when it is saved. If the user has entered prerequisites and later chooses a template, the template prerequisites are ignored and the already entered prerequisites are preserved.

Class	Condition
BASICS Session 1	Completion
BASICS Session 2	Missed Class
-	Participant Creation
Any	-
	Custom...

Only OTHER classes show in the list of classes to choose, not the current selected class

Clicking the plus sign adds another form line.

Trash icon
removes 2nd +
more items, and
blanks out the first
item.

=	▼	not registered	▼
≠		registered	
		completed	
		absent	

How are the prerequisites referenced? What happens at what point if they don't evaluate as true?

- When added to roster: gives a warning if participant does not meet the prerequisites, but allows the staff user to override and enter onto the roster anyway
- When a participant tries to self-register for a class through the student portal
- If a student is removed from a class or other parameters change that render the student ineligible, currently in BASICS nothing happens. They remain enrolled.

Class	=	Course
Date/time	*	BASICS I
Status	<	registered
Provider	<=	+ 3 Weeks

=	▼
≠	
<	
>	
<=	
>=	

Class

Status

Value

Date

Count

absent

=

#

Participant

Creation Date

Referral Code

PPP

PPV

Date

NOW

+ 3 Hours

- Weeks

Months

Participant	=	Course
Creation Date	*	BASICS I
Referral Code	<	registered
PPP	>	
PPV	<=	
	>=	
	+	3
		Weeks

Participant	=	Cheetos
Referral Code	≠	Fuzzhead

Participant	=	
PPP	≠	
Hair Color		
Shoe Color		
Favorite Color		

Type ahead field of unique values for this organization.

Participant	=	Cheetos
PPV	≠	Fuzzhead
Alcohol Risk		
French-Kissing Risk		
Marijuana Risk		

Custom
option only
appears for
super users

This is a popup div that can appear either over the class calendar page or the classes page.

Action

Send Notification

Update Participant

Message Type

Notification

Survey Invite

Notification SMS

Survey Invite SMS

Triggers

Class Invite

Class Cancel

Class Start

Class End

Class Absence

Class Decline

Class Drop

Class Template Detail

DetailsRosterPrerequisitesActions

Action

Send Invite

Send Completion

Send Next Survey if comple

+

Send Invite

Send Completion

Send Next Survey if comple

Title

Send Invite

Trigger

Class Invite

Action

Send Notification

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

Send

30

Hours

from trigger

Send If

Three Month Followup Not Complet

Save

Cancel

Hours

Days

Weeks

Months

View Send If Option setup

If Action == Send Notification, show these items:

Send If choices come from Organization/Notiffication Send Options; nav arrow only shows if logged in user has privileges to edit them

Route	Description
get class actions	
get class template send if options	
get message templates	
get class tokens	
save action weights	

Action

Set/Update Participant Property

Property:

Organization

::

Name

Expression:

Custom Expression

Options

If Action == Set/Update Participant Property or if Action == Set/Update Participant Record Item, show these items:

Action

Send Survey Invite

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

If Action == Send Survey Invite, show these items:

Action

Send Class Invite

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

If Action == Send Class Invite, show these items:

"Add" button only appears if logged in user has "Add" Class Templates privilege.

"Delete" button only appears if the class template has no attached classes

Search automatically narrows list for matches in title or description as it is typed.

the mag button dup pops up
the details div for the selected
class template

Route Name	Description
classes/	gets classes within the given date range for the logged in user's organization, fields
classes/id	gets class for the selected clicked on class from the calendar to pop up details
classes-export/pdf	sends list of id's, selected columns, & sort order,and returns pdf
classes-export/csv	sends list of id's, selected columns, & sort order,and returns csv
classes-export/excel	sends list of id's, selected columns, & sort order,and returns excel
classes-edit	sends id_provider, id_template, [id_class,...]
classes-delete	sends [id_class,...]
classes-search	sends all the stuff in the picture

If logged in user has edit privileges for Class Courses, edit button shows, and when clicked shows an edit popup. If logged in user only has view privileges, it shows the same popup with edits disallowed.

"Add" button only appears if logged in user has "Add" Courses privilege.

"Delete" button only appears if the logged in user has the "Delete" participant privilege.

	Course	Class Name^	Location	Start	Duration	Capacity	Description	
Q	BASICS 2	BASICS 2 Session 1	Student Wellness & Health	10:00 AM	1:00	12	BASICS 2 Group Session	
Q	BASICS 2	BASICS 2 Session 2	Student Wellness & Health	11:00 AM	1:00	12	BASICS 2 Group Session	
Q	BASICS 2	BASICS 2 Session 3	Student Wellness & Health	1:00 PM	1:00	12	BASICS 2 Group Session	

[illegible]

Route Name	Description
get courses	
create course	
update course	
delete course	
class templates for course	(may be included in get courses)

[illegible]

- When added to roster: gives a warning if participant does not meet the prerequisites, but allows the staff user to override and enter onto the roster anyway
- When a participant tries to self-register for a class through the student portal
- If a student is removed from a class or other parameters change that render the student ineligible, currently in BASICS nothing happens. They remain enrolled.

Class Template Details

Details | Prerequisites | Actions

Prerequisite

Search	Prerequisite	Trash
<input type="text"/>	not registered for course	
<input type="text"/>	has completed BASICS I	
<input type="text"/>	is Alcohol At Risk	
<input type="text"/>	participant added over 30 days ago	

The Count selection only appears if they choose "absent" for the status.

Prerequisite Title
has completed BASICS I

Any Condition Must be True ☐

Course

BASICS I

Status

Count

not registered

2

Trash icon removes 2nd + more items, and blanks out the first item.

Class	Condition
BASICS Session 1	Completion
BASICS Session 2	Missed Class
-	Participant Creation
Any	-
	Custom...

In Basics, there is a prerequisite to make sure they are not already registered for the selected class. I think we could safely say that this is always a rule in place, because no student would register twice for a class. So this rule should be hard-coded behind the scenes without having to select it.

The Count selection only appears if they choose "absent" for the status.

Clicking the plus sign adds another form line.

Missed class or Participant Creation action selection causes Class selection to disappear. Completion causes it to appear.

Only OTHER classes show in the list of classes to choose, not the current selected class

Course

Class
Participant
Custom

=	▼	not registered	▼
≠		registered	
		completed	
		absent	

Trash icon
removes 2nd +
more items, and
blanks out the first
item.

Route Name	Description
get class template prerequisites	
create class template prerequisite	
update class template prerequisite	
delete class template prerequisite	
get courses	

Class	=	Date
Date/time	≠	NOW
Status	<	+ 3 Hours
Provider	>	- Weeks
	<=	Months
	>=	

Class		Course
Date/time	^	BASICS I
Status	v	registered
Provider		+ 3 Weeks

=	▼
≠	
<	
>	
<=	
>=	

Class

Status

Value

Date

Count

absent

=

#

Participant	=	Date
Creation Date	≠	NOW
Referral Code	<	+ 3 Hours
PPP	>	- Weeks
PPV	<=	Months
	>=	

Participant	=	Course
Creation Date	= *	BASICS I
Referral Code PPP PPV	< ^ >	registered
	< =	+ 3 Weeks

Participant	=	Cheetos
Referral Code	≠	Fuzzhead

Participant	=	
PPP	≠	
Hair Color		
Shoe Color		
Favorite Color		

Type ahead field of unique values for this organization.

Participant	=	Cheetos
PPV	≠	Fuzzhead
Alcohol Risk		
French-Kissing Risk		
Marijuana Risk		

Custom

Custom
option only
appears for
super users

Q search

+

	Name^	Location	Start	Duration	Capacity	Description	
Q	BASICS 2 Session 1	Student Wellness & Health	10:00 AM	1:00	12	BASICS 2 Group Session	<div><div></div><div></div></div>
Q	BASICS 2 Session 2	Student Wellness & Health	11:00 AM	1:00	12	BASICS 2 Group Session	<div><div></div><div></div></div>
Q	BASICS 2 Session 3	Student Wellness & Health	1:00 PM	1:00	12	BASICS 2 Group Session	<div><div></div><div></div></div>

Class Template Detail

Details

Prerequisites

Actions

+

	Action	
<div></div>	Send Invite	<div><div></div><div></div></div>
<div></div>	Send Completion	<div><div></div><div></div></div>
<div></div>	Send Next Survey if comple	<div><div></div><div></div></div>

Title

Send Invite

Trigger

Class Invite

Action

Send Notification

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

Send

30

Hours

from trigger

Send If

Three Month Followup Not Complet

Save

Hours

Days

Weeks

Months

View Send If Option setup

If Action == Send Notification, show these items:

Action

Send Notification

Update Participant

Message Type

Notification

Survey Invite

Notification SMS

Survey Invite SMS

Triggers

Class Invite

Class Start

Class End

Class Absence

Class Decline

Class Drop

Route	Description
get class template actions	
get class template send if options	
get message templates	
get class tokens	

Action

Set/Update Participant Property

Property:

This

Expression:

Custom Expression

Options

If Action == Set/Update Participant Property or if Action == Set/Update Participant Record Item, show these items:

Action

Send Survey Invite

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

If Action == Send Survey Invite, show these items:

Action

Send Class Invite

Message Template

Ticked Off Template (email)

Student

Staff - Provider

Staff - Admin

Staff - AllOther

To

other email...

CC

other email...

BCC

other email...

If Action == Send Class Invite, show these items:

Send If choices come from Organization/Notification Send Options; nav arrow only shows if logged in user has privileges to edit them

Initial found set of video conferences is all conferences, paginated to 50 records, sorted by conference date descending. Searches go to the API and return paginated results. Choosing All or Mine filter results from the API appropriately. Search searches the title only.

Search

Show: ☒ All ☐ Mine

Title	Date	Invitees
<input checked="" type="checkbox"/> Big Discussion	10/15/2015	Joe Smith, Josephine Smith, Jim Doe
<input checked="" type="checkbox"/> Solve Everything	10/17/2015	Josephine Smith, John Doe
<input checked="" type="checkbox"/> Watch each other eat sushi	10/19/2015	Kevin Staff, Kyle Participant

Participants

Staff

Conference Title

Search

Participant

Joe Smith

Jane Doe

John Doe

Jane Smith

Josh Smith

Josephine Smith

Josephine Doe

Kathy Smith

Kathy Smythe

Kevin Smithy

Send Invite

Video Invitee

Homer Simpson (Me)

Joe Smith (Participant)

Josephine Smith (Participant)

Kevin Staff (Staff)

Remove from Conference

Send Invites

Now

Schedule

Start Date

12/1/2015

Start Time

10:30 AM

Message Template

Video Conference Invite

Now

Schedule

Start Date

12/1/2015

Start Time

10:30 AM

Message Template

Video Conference Invite

Go To Conference

Save

Save

Invite also sends a .ico file attachment in the email so they can add it to their calendar.

Send Invites is disabled until the conference has been initially saved or if the form is dirty because of invitee changes. Once saved, the Save button is disabled and the Send Invites becomes enabled.

When Send Invites is clicked, only those participants who have not received an invite yet are sent an invite.

If invitee has not received an invitation, icon represents a "not-sent" status. If invitee HAS received an invitation, icon represents a "sent" status.

This always assumes that the creator user is one of the invites.

only allows future conferences to be deleted. otherwise the delete button doesn't appear. When deleted, it is implied that a cancellation message is sent.

It uses a very simple generic cancellation message for everybody.

Sends email invites fashioned after the messaging template for video conference invites

If this modal window is loaded within 30 minutes of the start or end of the conference, it automatically defaults to "Now" and the button "Go To Conference" appears.

If an invitee has received an invite and is then removed, they receive a cancellation notice. If they have not, they are simply removed.

This list is prefiltred to participants that have current treatment cycles with reference codes that match the logged in user's assigned reference codes.

If there are any invitees which have received invites, the date and time cannot be edited. If invitees with invites have been removed, then the date and time can be edited again.

Route Name

get participants by search param

get staff users

get get upcoming video conferences

send invites

message templates

Description

gets all staff users

start date, start time, list of invitees

filtered by type==video conference

A Web Page

http://

Impact

Organization Logo

Impact Feedback Video Conference

Me

Josephine Smith

Joe Smith (waiting)

End Conference

A Web Page

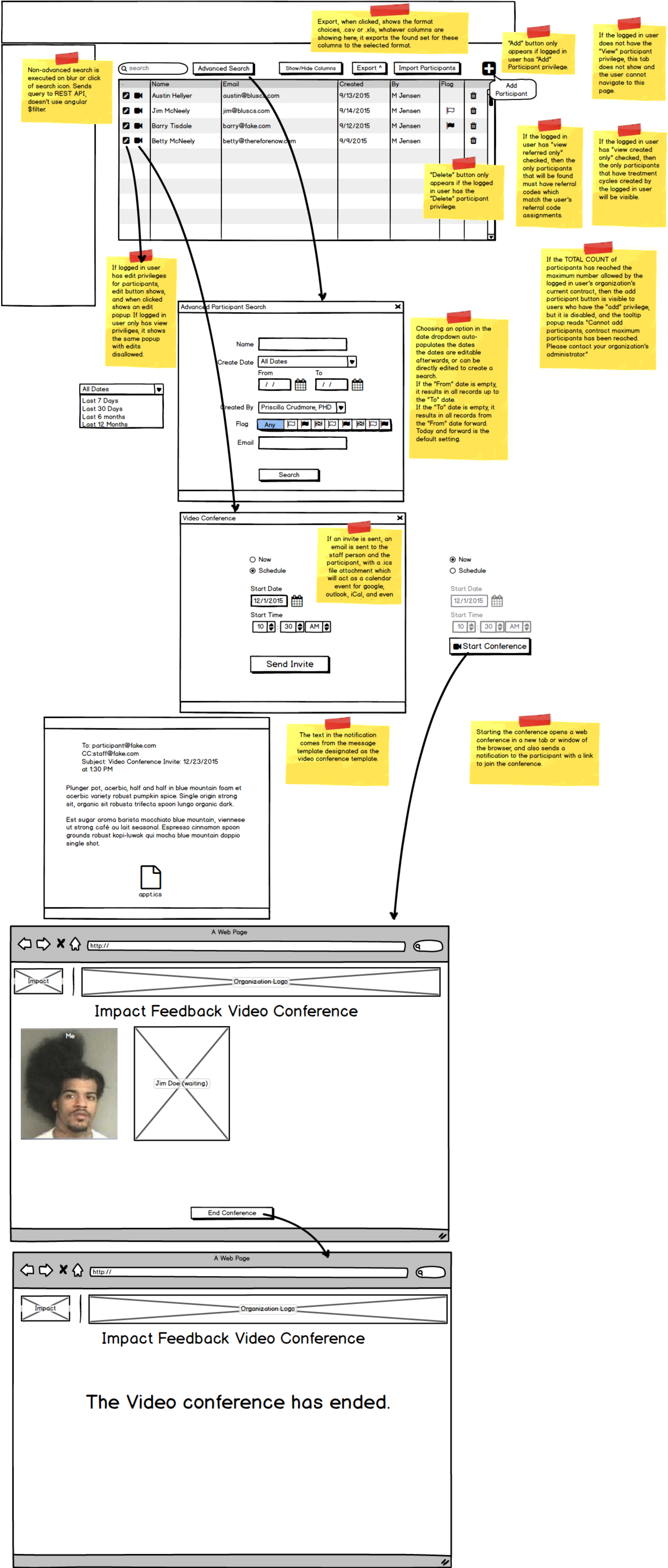
http://

Impact

Organization Logo

Impact Feedback Video Conference

The Video conference has ended.



Route Name	Description	notes
get participants	gets all participants for organization, also sends sort field and sort direction	default sorted asc by name and paginated by 100. Scrolling below these triggers query for next page
participant search	receives params and searches for participants for logged in organization	same for simple and advanced searches
export participants	sends columns, search params, format, returns as file	
send video invite	sends participant userID, now or date params	sends invite notification and returns video conference id or url
log view	logs when staff user selects a participant to view or edit details	or has a video conference with them.

Q search

Advanced Search

Show/Hide Columns

Export ^

Import Participants

+

Name	Status	Email	Created	By	Flag	
Austin Hellyer	Active	austin@bluscs.com	9/13/2015	M Jensen		
Jim McNeely	Active	jim@bluscs.com	9/14/2015	M Jensen		
Barry Tisdale	Active	barry@fake.com	9/12/2015	M Jensen		
Betty McNeely	Active	betty@thereforenow.com	9/9/2015	M Jensen		

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

Org Identifier

* First

* Last

* Email

* Username

* Date of Birth / /

* Birth Gender Male Female

Language English

Race Polynesian

* Required Fields

Send Password Reset Email

☐ Allow Participant Portal Login

Flag None

Save

Cancel

When logged in user has view, but not edit privileges, this entire modal popup is view only

Matching participant has differences, will be overwritten

Staff role filter only shows options allowed by the user's role assignment privileges. Also if they choose "All" and they only have Admin and Clinical, they'll see only those notes, mixed

Ref Codes assigned to this logged in user show up in option list, with "All" auto-selected as first choice.

Only notes for ref codes assigned to the logged in user

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

Referral Code Filter: All

Staff Role Filter: All

Date	Entered	Morons	Fools	Geniuses	Note
3/13/16	Q. Quotillian	Geniuses			Pastry gummi bears claw cake jelly-o. Candy pudding tootsie roll pudding. Sweet I love jelly-o ice cream marshmallow bonbon biscuit. Lollipop pastry halvah carrot cake apple pie brownie. Cookie apple pie chocolate gummies pudding. Apple pie cheesecake I love biscuit soufflé ice cream cake biscuit wafer. Gummies dragée cake.
12/3/15	B. Balldazzo	Morons			Tiramisu cake bonbon fruitcake powder dragée cotton candy. Sweet cotton candy apple pie macaroon croissant toffee dragée jujubes. Wafer apple pie croissant muffin powder sweet bear claw I love sesame snaps I love jelly beans sweet roll.
11/15/15	R. Reginald	Fools			

Save

Cancel

Notes can only be edited or deleted the same day they are entered, by the same person that created them. The edit icon only appears for those notes.

However, the administrator users can edit and delete any note at any time.

Notes are edited and deleted inline - upon clicking the edit button, the row is highlighted, and the ref code becomes a select input if the logged in user has more than one ref-code assigned to them. If not that field remain set to their own ref-code. The note becomes an editable text area. The edit button, in edit mode, becomes a "cancel" button, and the delete button becomes a "save" button.

If the logged in user only has one referral code assigned to them, no filter selection appears, and list is automatically filtered to their one referral code.

Delete button highlights the row in red, edit button becomes a 'cancel' button, and the trash becomes a 'really delete' button. The words 'really delete this note?' appear over the text of the row in larger letters.

All
Food Prefs
Television Prefs
Fashion

The property categories up above will be populated from the Participant Property Groups set up under Admin->Organization.

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

All

Property Category Food Prefs

Bacon Preference Crispy

Favorite Sandwich

Favorite Breakfast Food ☒ Eggs ☐ Waffles ☐ Toast ☐ Fish

Save

Cancel

Route Name	Description	notes
send password reset email	tells backend to send a password reset email	
get one participant's details		
update/create one participant's details		
get participant's notifications	filter flag - all, sched'd, sent, failed	
get org ppg's		
get participant ppg responses		
save participant's ppg's		
get participant history		
get participant treatment cycles		
update participant treatment cycle		

The Options are also set up under Admin->Organization

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

Filter All Scheduled Sent Failed

Event	Subject	Created	Status
COMPLETED		7/1/15 1:04 PM	failed: not sendable
COMPLETED	PFR	7/1/15 1:04 PM	success: 12/31/69
COMPLETED		7/1/15 1:04 PM	failed: not sendable
PPT_CREATE	here's that reminder	3/12/15 7:35 AM	success: 12/31/69
PPT_CREATE		3/12/15 7:35 AM	failed: if assert
PPT_CREATE	hey you!	3/12/15 7:35 AM	success: 12/31/69
PPT_CREATE		3/12/15 7:35 AM	failed: if assert
ASSIGN	thanks for registering for your Marijuana Ses	2/27/15 3:01 PM	success: 12/31/69
ASSIGN_ENROL	Marijuana Session #1 reminder	2/27/15 3:01 PM	success: 2/28/15
PPT_CREATE		2/27/15 3:00 PM	failed: if assert

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

Q search

Event	By	Date/time
view participant	M McNeil	12/1/15 1:33 PM
view participant	P Loo	11/24/15 7:13 PM
view participant	P Loo	11/24/15 6:52 PM
add new student portal account	system	11/14/15 5:27 PM
completed survey BASICS 1		10/28/15 3:23 PM
video conference		10/15/15 5:15 PM

View or edit participant actions are shown here, with the staff user who performed the action. Class acceptance, participation, and completion are shown here. Video conferences are shown here. Survey begin, work, and completion are shown here.

Participant Details

Personal Properties Notes Notifications History Treatment Cycles

All

Expires: 12/15/2016

Referral Code: No Referrer

Status: Current

RefCode	End	Status
No Referrer		
ATHL	2/5/16	Current
ATHL	11/12/15	Incomplete

Show Attached

Search

Q search

Q search

Survey ☐ Survey 1 ☒ Survey 2 ☐ Survey of Great Importance ☒ Yet Another Survey title

status complet

Class ☐ BASICS 1 ☒ BASICS 2 ☐ Class of Great Importance ☒ Yet Another Class title

status failed

Save

The referral code options dropdown only shows for administrators or users with more than one referral code selected for them by an administrator. If they only have one referral code, the option is selected and the select box input is disabled.

Referral Code:
No Referrer
ATHL
Hopless Drunkards

The referral code options dropdown only shows for administrators or users with more than one referral code selected for them by an administrator. If they only have one referral code, the option is selected and the select box input is disabled.

Route Name

submit participants

Description

returns errors or success notification

notes

Q search

Advanced Search

Show/Hide Columns

Export ^

Import Participants

+

Name	Email	Created	By	Flag	
Austin Hellyer	austin@bluscs.com	9/5/2015	M Jensen		

Import Participants

Choose...

Username
Name
Email
Period
Active
Referral
Portal

Portal

austin20150312@bluscs.co	Austin Hellyer	1	Active		austin20150312@bluscs.co
osu_2015	Oregon State	1	Active		osu_2015
austin10_pls@bluscs.com	Austin Hellyer	1	Active		austin10_pls@bluscs.com
89500		1	Active		
89499		1	Active		
austingreen@bluscs.com	Austin Green	1	Active		austingreen@bluscs.com
austin5@bluscs.com	Austin Hellyer	1	Active	OWEEK2014	austin5@bluscs.com
austin4@bluscs.com	Austin Hellyer	1	Active	OWEEK2014	austin4@bluscs.com
austin3@bluscs.com	Austin Hellyer	1	Active	OWEEK2014	austin3@bluscs.com
austin2	Austin Hellyer	1	Active	OWEEK2014	austin2

Submit

Cancel

The user chooses a file. The chooser only allows the choice of .xls or .csv files. Once chosen, the rows show in the table below. The Ignore Rows option only appears after the file has been imported, and works immediately as it is updated in the imported file rows displayed in the table below. The field map select boxes above are initially blank, and allow the user to assign rows from the chosen file to be mapped to the appropriate system fields. Not all imported fields have to be mapped, but the system requires at least the username, name, and email be selected. Until the essential fields have been mapped, a message indicating the essential fields which remain unmapped appears at the upper right of the popup, and the import button remains disabled.

upon initial import and field mapping, system checks for matches to existing participants based on ID, and if no ID field is indicated, email. One or the other is required.

If there is a match, and there are data differences, the rows which will overwrite are hilited in red. It does not show what exactly will change.

rows which have unrecognized referral codes will have that field and its text in blue, and a warning below stating that unrecognized referral codes will be imported with "no referral code" designation.

rows which have referral codes for existing participants with current matching treatment cycles will have the referral code hilited in yellow, with a comment below indicating that these rows already have a currently active treatment cycle for that participant and referral code.

Import Participants

Choose File...

☐ Ignore Top

3 Rows

Username

Name

Choose...

Period

Status

Referral

Portal

austin20150312@bluscs.co	Austin Hellyer	austin@bluscs.com	1	Active		austin20150312@bluscs.co
osu_2015	Oregon State	chris@bluscs.com	1	Active		osu_2015
austin10_pls@bluscs.com	Austin Hellyer	austin@bluscs.com	1	Active		austin10_pls@bluscs.com
89500			1	Active		
89499			1	Active		
austingreen@bluscs.com	Austin Green (prev : Austin Blue)	austin@bluscs.com	1	Active		austingreen@bluscs.com
austin5@bluscs.com	Austin Hellyer	austin3@bluscs.co	1	Active	OWEEK2014	austin5@bluscs.com
austin4@bluscs.com	Austin Hellyer	austin@bluscs.com	1	Active	OWEEK2014	austin4@bluscs.com
austin3@bluscs.com	Austin Hellyer	austin@bluscs.com	1	Active	OWEEK2014	austin3@bluscs.com
austin2	Austin Hellyer	austin@bluscs.com	1	Active	OWEEK2014	austin2

Matching participant has differences, will be overwritten

referral code is unrecognized; will be assigned to "No Referral Code"

Current active treatment cycle already exists for referral code

Import

Cancel

Import Participants

Choose File...

☐ Ignore Top

3 Rows

Could not import participants.

Please try again.

This shows if the import file is simply unreadable for some reason.

<Referral Code> Details

SetupUser MembershipTreatment Cycle SetupTreatment Cycle Actions

Referral Code

☒ Enabled

Description

Save

<Referral Code> Details

Setup

User Membership

Treatment Cycle Setup

Treatment Cycle Actions

Show Attached

Search Users

	Username	Email	Name	Role	
<input type="checkbox"/>	ricardobroberg@hotmail.com	ricardobroberg@hotmail.com	Ricardo Broberg	Admin	
<input type="checkbox"/>	brandt@bluscs.com	brandt@bluscs.com	Brandt Milczewski	Minion	
<input checked="" type="checkbox"/>	sharky	chris@bluscs.com	Christof Starkov	Overlord	
<input type="checkbox"/>	roger@gmail.com	roger@gmail.com	roger referrer	Minion	
<input type="checkbox"/>	user2	chris@bluscs.com	jimmy johns	Minion	
<input checked="" type="checkbox"/>	testMS	yahoo@yahoo.com	Morningside Dood	Minion	
<input checked="" type="checkbox"/>	testCU	hotmail@hotmail.com	CUMC Dood	Minion	
<input type="checkbox"/>	testerz	david@bluscs.com	David Z	Minion	
<input type="checkbox"/>	chris@bluscs.com	chris@bluscs.com	Chris Stark	Minion	

Save

<Referral Code> Details																																							
Setup	User Membership	Treatment Cycle Setup	Treatment Cycle Actions																																				
Cycle Period Expiration <input type="text"/> 100 <input type="button" value="Days"/> <input type="button" value="Weeks"/> <input type="button" value="Months"/> after initiation		<div style="display: flex; justify-content: space-between;"> Show Attached Search </div> <div style="display: flex;"> <div style="flex: 1;"> <p>Required Survey Completion</p> <input type="text"/> Q search </div> <div style="flex: 1;"> <p>Required Course Completion</p> <input type="text"/> Q search </div> </div> <div style="display: flex;"> <table border="1" style="width: 50%;"> <thead> <tr><th colspan="2">Survey</th></tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>Survey 1</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Survey 2</td></tr> <tr><td><input type="checkbox"/></td><td>Survey of Great Importance</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Yet Another Survey title</td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table> <table border="1" style="width: 50%;"> <thead> <tr><th colspan="2">Course</th></tr> </thead> <tbody> <tr><td><input type="checkbox"/></td><td>BASICS 1</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>BASICS 2</td></tr> <tr><td><input type="checkbox"/></td><td>Class of Great Importance</td></tr> <tr><td><input checked="" type="checkbox"/></td><td>Yet Another Class title</td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table> </div> <div style="margin-top: 10px; text-align: center;"><input type="button" value="Save"/></div>		Survey		<input type="checkbox"/>	Survey 1	<input checked="" type="checkbox"/>	Survey 2	<input type="checkbox"/>	Survey of Great Importance	<input checked="" type="checkbox"/>	Yet Another Survey title									Course		<input type="checkbox"/>	BASICS 1	<input checked="" type="checkbox"/>	BASICS 2	<input type="checkbox"/>	Class of Great Importance	<input checked="" type="checkbox"/>	Yet Another Class title								
Survey																																							
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<input checked="" type="checkbox"/>	BASICS 2																																						
<input type="checkbox"/>	Class of Great Importance																																						
<input checked="" type="checkbox"/>	Yet Another Class title																																						

<Referral Code> Details

Setup | User Membership | Treatment Cycle Setup | Treatment Cycle Actions

+

Cycle Begin

Cycle Expired - Success Notification

Cycle Expired - Failure

Cycle Ended - Success

Cycle Ended - Failure

Title

Cycle Expired - Success Notification

Trigger

Cycle Begin

Action

Send Notification

Message Template

Ticked Off Template (email)

Student

Staff - Admin

Staff - All

Other

To

☐ ☐ ☐ other email...

CC

☐ ☐ ☐ other email...

BCC

☐ ☐ ☐ other email...

Send

30

Days from trigger

Send If

Big Shoes

Save

If Action Notification items:

View Setup If Option setup

If Action == Set/Update Participant Property
or if Action == Set/Update Participant Record Item,
show these items:

If Action == Send Survey Invite, show these items:

If Action == Send Class Invite, show these items:

If the logged in user does not have Organization edit privileges, this screen is all view only and cannot be edited.

[illegible]

Group Title

[illegible]

Group Question Setup

Choose from Question Template....

Choose...

Text Box

Comment Box

Date/Time

Multiple Choice

Dropdown

Rating Scale

Matrix

Question:

How often do you smoke a pipe per week?

Display Conditions:

☒ Required

Variable Name: favorite_gum

Choices

Single Choice

Multiple Choice

0

1 - 3

> 3

☒ Allow Other

Other pipe-smoking frequency...

☐ Use as Question Template

Label: favorite gum

Name is already used

Save

Preview

How often do you smoke a pipe per week?

1-3

Text Box
Comment Box
Date/Time
Multiple Choice
Dropdown
Rating Scale
Matrix

Question 3:

What is your favorite brand of gum?

Variable Name: GUM_BRAND

Display Conditions: ☒ Published Show for: All Branches

Placeholder Text: Favorite Gum....

Use as Template ☐

Name: favorite gum
Name is already used

Validations

<input checked="" type="checkbox"/> Required	<input checked="" type="checkbox"/> Valid Number	Minimum	Maximum
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Length	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Positive Whole Number	<input checked="" type="checkbox"/> Numeric Range	<input type="text"/>	<input type="text"/>

Invalid Message: Please enter a valid chewing start date.

Preview

What is your favorite brand of gum?

Favorite Gum....

Route	Description
get ppg groups	
add ppg group	
add ppg question	
update ppg id/weight	for reordering ppg questions.
get questions for ppg group	returns question_type, template parent, required flag, variable name, question, question details per type, validation choices per type
update ppg question	

searches go to the API and paginate.

Q search

Advanced Search

Export ^

Survey	Identifier	Name	Started	Completed	Referral	
<input checked="" type="checkbox"/> AUDIT_v2_copy	austingreen@bluscs.com	Austin Green	02/12/2015 03:09 PM	n/a		
<input checked="" type="checkbox"/> fl_baseline	1234	David Zhang	09/06/2013 11:05 AM	n/a		
<input checked="" type="checkbox"/> fl_followup	1234	David Zhang	09/10/2013 11:05 AM	n/a		
<input checked="" type="checkbox"/> shorty_followup	1234	David Zhang	09/12/2013 11:03 AM	n/a		
<input checked="" type="checkbox"/> short_test	49666	Jimmy Falcon	09/23/2013 09:48 PM	n/a		
<input checked="" type="checkbox"/> baseline_alcohol_copy	X54321	Sandy Oconnor	09/25/2013 04:26 PM	n/a		
<input checked="" type="checkbox"/> fl_baseline	sharkaine@yahoo.com	Ducky Duck	09/25/2013 04:26 PM	n/a		
<input checked="" type="checkbox"/> safe_survey	W01332245	Mark Chambers	04/04/2014 09:22 AM	n/a		
<input checked="" type="checkbox"/> Rice				10/16/2013 10:07 AM		
<input checked="" type="checkbox"/> Vassar_test	W00223311	James Hendrix	11/01/2013 01:25 PM	n/a		

fl baseline

Details

Answers

Summaries

Reports

Survey

fl_baseline

Authenticated

Yes, invitation code 522a17842e59e

Participant

1234

Status

In Progress

Started:

9/6/13 11:05 AM

Last Activity

9/6/13 11:07 AM

Referral Code

Hopeless Derelicts

Completion Date

9/6/13 11:07 AM

Completed

Yes

No

Unsubmit

Delete

fl baseline

Details

Answers

Summaries

Reports

FLIPPR

Generate New Report

Reports	Date	
FLPFR	11/22/2016	View
FLPFR	11/1/2016	View
snapshot	11/1/2016	View

FLIPPR

SLIPPR

BASICS 2

The survey session is not editable except for these two buttons. Delete soft-deletes the record.

Unsubmit only appears if the survey has been completed, and it sets the status to In Progress, which opens it back up for the participant to change some answers.

View Report opens in a new tab and displays report

Ordered by report name, date desc.

Reports are initially generated upon survey completion.

fl baseline

Details

Answers

Summaries

Reports

Page	Question	Answer
1	Confidentiality Question	Yes
2	First Name	Alexander
2	Last Name	Great
2	Gender	Male
2	Age	42
2	Weight	420
2	Medications	no
3	Goal 1	eat
3	Goal 2	sleep
3	Goal 3	sleep more
4	Alcohol Use	Have used in the last 30 days
4	Tobacco - Cig Use	Have used in the last 30 days
4	Tobacco - Pipe Use	Have used in the last 30 days

fl baseline

Details

Answers

Summaries

Reports

Summary	Value
Weekly Alcohol Consumption	5.4
Monthly Alcohol Consumption	26.3
Yearly Alcohol Consumption	307.8

Advanced Survey Session Search

Survey

Identifier

Start Date

Today and Forward

From

To

Completion Date

Today and Forward

From

To

Referral

Priscilla Crudmore, PHD

Search

- All Dates
- Last 7 Days
- Last 30 Days
- Last Semester
- This Semester

Q search

Advanced Search

Export ^

Filter

All

 Pending Sent Failed Cancelled

Create Survey Invitations

	Survey	Identifier	Sent To	Created	Send	Referral Code	Status	
<input checked="" type="checkbox"/>	baseline_alcohol_copy	W01234567	Chris Stark	12/17/2012 10:08 PM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	Cornell_Test_SURVEY	W01234567	Chris Stark	01/23/2013 09:24 PM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	VT_2WK_Updated_VCI	W01234567	Chris Stark	01/28/2013 08:52 AM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	shorty_followup	X54321	Sandy Oconnor	01/30/2013 10:16 AM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	shorty_short	X54321	Sandy Oconnor	01/30/2013 10:19 AM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	shorty_short	W01234567	Chris Stark	01/30/2013 10:21 AM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	shorty_short	W01234567	Chris Stark	01/30/2013 10:27 AM	12/17/2012 10:08 PM		Sent	
<input checked="" type="checkbox"/>	shorty_short	W01234567	Chris Stark	03/16/2013 02:27 PM	12/17/2012 10:08 PM		Pending	<input type="radio"/>
<input checked="" type="checkbox"/>	shorty_test	W01234567	Chris Stark	03/16/2013 02:30 PM	12/17/2012 10:08 PM		Pending	<input type="radio"/>
<input checked="" type="checkbox"/>	shorty_short	W01234567	Chris Stark	04/01/2013 02:19 PM	12/17/2012 10:08 PM		Failed	<input type="radio"/>

Send Date appears in parenthesis if it is still in the future

statuses: Sent, Pending, Failed, Cancelled

If pending, the button to cancel appears which sets the notification to cancelled.

Cancel Invite

Select Participants to Invite

Survey

Please Select...

Message Template

Please Select...

Referral

Please Select...

Preview

Send

Search Participants

Invited Participants

Q search

Invite	Identifier	Email	Name	Created	By	Flag
<input checked="" type="checkbox"/>	austin20150312@bluscs.com	austin@bluscs.com	Austin Hellyer	3/12/15 7:35 AM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	osu_2015	chris@bluscs.com	Oregon State	2/27/15 3:00 PM	Ricardo Broberg	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austin10_pls@bluscs.com	austin@bluscs.com	Austin Hellyer	2/17/15 10:06 AM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	89500			2/6/15 2:10 PM	system	<input type="checkbox"/>
<input checked="" type="checkbox"/>	89499			2/6/15 2:10 PM	system	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austingreen@bluscs.com	austin@bluscs.com	Austin	2/5/15 9:18 AM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austin5@bluscs.com	austin3@bluscs.com	Austin Hellyer	2/4/15 12:11 PM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austin4@bluscs.com	austin@bluscs.com	Austin Hellyer	2/4/15 12:09 PM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austin3@bluscs.com	austin@bluscs.com	Austin Hellyer	2/4/15 12:05 PM	matt 2jensen	<input type="checkbox"/>
<input checked="" type="checkbox"/>	austin2	austin@bluscs.com	Austin Hellyer	2/2/15 4:43 PM	matt 2jensen	<input type="checkbox"/>

Survey Message

Message Overview

Message Detail

Survey

fl_baseline

Survey URL

Yes, invitation code 522a17842e59e

Invitation Code

5109638673473

Participant

X54321

Sent To

chris@bluscs.com

Date Sent

9/6/13 11:05 AM

Date Used

9/6/13 11:07 AM

This is not editable.

Search Participants

Invited Participants

Identifier

Email

Name

Created

By

Flag

austin20150312@bluscs.com

austin@bluscs.com

Austin Hellyer

3/12/15 7:35 AM

matt 2jensen

☐

osu_2015

chris@bluscs.com

Oregon State

2/27/15 3:00 PM

Ricardo Broberg

☐

austin10_pls@bluscs.com

austin@bluscs.com

Austin Hellyer

2/17/15 10:06 AM

matt 2jensen

☐

89500

2/6/15 2:10 PM

system

☐

89499

2/6/15 2:10 PM

system

☐

austingreen@bluscs.com

austin@bluscs.com

Austin

2/5/15 9:18 AM

matt 2jensen

☐

austin5@bluscs.com

austin3@bluscs.com

Austin Hellyer

2/4/15 12:11 PM

matt 2jensen

☐

austin4@bluscs.com

austin@bluscs.com

Austin Hellyer

2/4/15 12:09 PM

matt 2jensen

☐

austin3@bluscs.com

austin@bluscs.com

Austin Hellyer

2/4/15 12:05 PM

matt 2jensen

☐

austin2

austin@bluscs.com

Austin Hellyer

2/2/15 4:43 PM

matt 2jensen

☐

Advanced Survey Invitation Search

Survey

Identifier

Code

Creation Date

Today and Forward

From

/ /

 To

/ /

Sent Date

Today and Forward

From

/ /

 To

/ /

Search

All Dates

Last 7 Days

Last 30 Days

Last Semester

This Semester

Q search

Advanced Search

Filter

All

Pending

Sent

Failed

Cancelled

	Event	Recipients	Subject	Created	Status	
	COMPLETED			7/1/15 1:04 PM	failed	
	COMPLETED	To: ricardobroberg@hotmail.com	PFR	7/1/15 1:04 PM	success	
	COMPLETED			7/1/15 1:04 PM	failed	
	PPT_CREATE	To: austin@bluscs.com	here's that reminder	3/12/15 7:35 AM	success	
	PPT_CREATE			3/12/15 7:35 AM	failed	
	PPT_CREATE	To: austin@bluscs.com	hey you!	3/12/15 7:35 AM	success	
	PPT_CREATE			3/12/15 7:35 AM	failed	
	ASSIGN	To: chris@bluscs.com	thanks for registering for your Marijuana Session	2/27/15 3:01 PM	success	
	ASSIGN_ENROLL	To: chris@bluscs.com	Marijuana Session #1 reminder	2/27/15 3:01 PM	pending	
	PPT_CREATE			2/27/15 3:00 PM	pending	

If pending, the button to cancel appears which sets the notification to cancelled.

Cancel Notification

Notification Details

Event

Created

Status

To

CC

BCC

Subject

Body

My entire existence was constructed by a sociopath in a sweater vest; what do you suggest I do? Oh my god! Did it sing? I'll kill a man in a fair fight. Or if I think he's gonna start a fair fight. Or if he bothers me. Or if there's a woman. Or if I'm getting paid. Mostly when I'm getting paid. Don't care much for fancy parties. Too rough. I, Anya, promise to love you, to cherish you, to honor you, but not to obey you, of course, because that's anachronistic and misogynistic and

Advanced Log Search

Event

Recipient

Date Created

Today and Forward

From

//

To

//

Status

success

failed

Search

- All Dates
- Today and Forward
- Last 7 Days
- Last 30 Days
- Last 365 Days

[View Recent System Announcements](#)Administrator

Announcements

Upcoming Changes

We're excited to announce that we're making several new enhancements to the platform by Summer 2015. These updates include:

API - Ability to communicate securely with your BASICS Feedback data from within other applications.

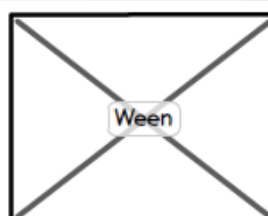
Video Conference and Chat - Engage with your participants on a one-on-one basis using video/audio and online chat feature. You can even save the sessions for later viewing if the participant approves.

SMS messaging - Send out class reminders and scheduling updates via text messaging to your participants.

Status Updates - See when a participant is online and viewing a survey or feedback report in real-time.

WEEN - Marijuana Tracking App released for BASICS Feedback!

We're excited to release our new marijuana tracking app called WEEN. The app was designed to allow students or any user easily input in the frequency of marijuana usage and receive reminders on if their usage has



If the logged in user does not have the "View" Message Template privilege, this tab does not show and the user cannot navigate to this page.

If logged in user has edit privileges for message templates, edit button shows, and when clicked shows an edit popup. If logged in user only has view privileges, it shows the same popup with edits disallowed.

Type is a necessary value which filters the list to only those message types.

"Add" button only appears if logged in user has "Add" Participant privilege.

If the currently active contract for the logged in user's organization only allows 1 template, then after one has been created, the "add" button becomes disabled for those who have the privileges to see it at all.

"Delete" button only appears if the logged in user has the "Delete" participant privilege.

One of the types, which will be automatically loaded in a new customer instance, is a video conference invite.

Notification templates have the least number of token options: just Org and Participant and possibly Ppg info.

Class invite templates would include class tokens, and survey invites would include survey tokens.

A tooltip pops up to explain each selection if you hover over it for a second.

Q search

TypeClass - Activity

Type	Name	Subject	Created	
Class - Activity	Missed Feedback Session_copy (from University	Important: Missed Session - Reschedule	5/14/14	
Class - Activity	3 month reminder 1x_copy (from University of Ver	Reminder to complete followup BASICS assessn	5/14/14	
Class - Activity	BASICS completion notification - Participant_copy	You've completed UVM BASICS	5/14/14	
Class - Activity	BASICS completion notification - CSES_copy (fro	{PPT:FIRST} {PPT:LAST} completed UVM BASIC	5/14/14	
Class - Activity	Student removed from class (by staff)_copy (from	BASICS Class cancellation	5/14/14	
Class - Activity	Feedback session registration notification_copy (f	Information re: your upcoming BASICS Session	5/14/14	
Class - Activity	BASICS Session 1 reminder_copy (from Universit	{CLASS: DESCRIPTION} reminder	5/14/14	
Class - Activity	Student removed from class (by student)_copy (f	Removed from class confirmation.	5/14/14	
Class - Activity	Session reminder_copy (from University of Vermo	{CLASS: DESCRIPTION} reminder	5/14/14	

+

Add Message Template

Message Template Details

TypeClass - Activity

Name

Subject

Message TypeEmailSMS

B I U S style

Insert Data

[[organization::contact name]],

Bacon ipsum dolor amet cow doner pork shoulder ham hock pork chop frankfurter swine tri-tip. Chicken rump sausage pork chop bresaola jerky tail pig. Cow sausage ham hock frankfurter capicola meatloaf chuck. Chicken pork loin swine ham hock, kevin bacon salami beef kielbasa chuck andouille capicola shoulder. Pork chop prosciutto pork loin short ribs jerky tongue.

Organization

contact email

contact name

contact phone

department name (i.e. Health Service)

department website

organization name (i.e. Example University)

student portal url (non-hyperlink)

student portal hyperlink

video conference hyperlink

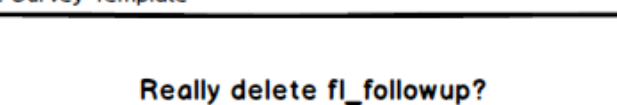
Reprehenderit kevin ball tip tail. Landjaeger picanha meatloaf proident laboris minim. Veniam bacon est commoda. Nulla turducken sirloin ad fugiat tail dolore flank pariatur.

click a category to pop up a chooser.
clicking another category creates a new floating chooser for that category.
double-clicking a row inserts the item like this: [Organization: contact name]
it inserts wherever the cursor is in the text window.

Route Name	Description
get message templates	
create message template	
update message template	
delete message template	
get message template tokens	

Duplicated surveys appear directly below the origin survey, named "copy of " + original name.

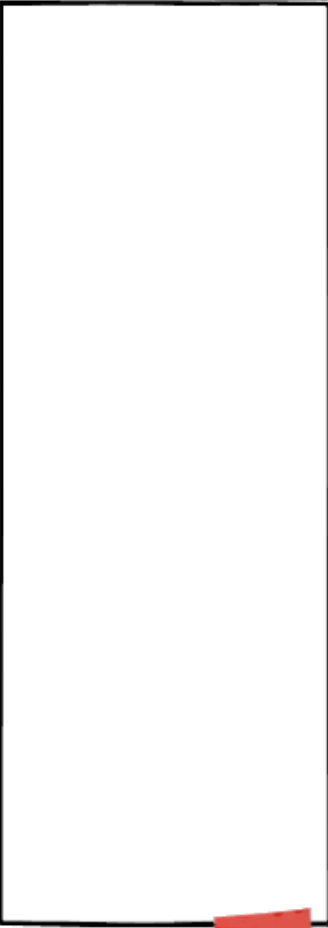
Route	Description
get survey templates	
duplicate survey template	
delete survey template	



Delete Survey Template

Really delete fl_followup?

Delete Cancel



Q search

Q		Name	Description	Published	
Q		a_survey	UVA test	yes	
Q		AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College	yes	
Q		baseline_alcohol_c	NU baseline alcohol assessment	no	
Q		baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q		copy_survey_test	copy_survey_tester	yes	
Q		Cornell_Test_SUR	calendar only	yes	
Q		david_survey	test	yes	
Q		fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q		fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q		fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Actions

Personas

Survey Title

Baseline Alcohol Survey

Description

Baseline Alcohol Survey

Survey Entrance Option

Invitation Code

?

☐ Referral Code Required

☒ Published

URL: <https://RSBbasicsfeedback.com/survey/cmon>

+

No Referral Code

Copy URL

Save

Survey Time Constraints

Add time blocks when students cannot access the system to take a survey.

+

	Type	Start	Duration	
Q	Weekly	Tuesday 9:00 PM	3 hr 30 min	

One Time

Start Date

11/25/2015

Start Time

08

:

30

AM

Duration

2

hrs

00

mins

Save

Survey Entrance Option

Invitation Code

Anonymous

Self-Register

Invitation Code means, participants can only get into the survey if they are sent a link in a message invite with a specific identifier code embedded in the url.

Anonymous means participants can simply click the generic url shown below for this survey and take it, and no one ever knows who they were.

Self-Register means, they can click on the generic link, and either log in with their participant username/password, or create a participant login at that point, prior to taking the survey.

Published means, if it can be available on lists to be sent out in invites if it is an Invitation Code survey, or if the link to the survey actually works or displays an "unpublished" error page when the participant navigates to it.

Daily

Start Time

08

:

30

AM

Duration

2

hrs

00

mins

Weekly

Repeat On

S

M

T

W

T

F

S

Starts On

11/25/2015

Ends On

11/25/2015

Start Time

08

:

30

AM

Duration

2

hrs

00

mins

Monthly

Repeat On

S

M

T

W

T

F

S

Starts On

11/25/2015

Repeat By:

☒ day of month

☐ day of week

Ends On

11/25/2015

Start Time

08

:

30

AM

Duration

2

hrs

00

mins



		Name	Description	Publish	
		a_survey	UVA test	yes	
		AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
		baseline_alcohol_c	NU baseline alcohol assessment	no	
		baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
		copy_survey_test	copy_survey_tester	yes	
		Cornell_Test_SUR	calendar only	yes	
		david_survey	test	yes	
		fl_baseline	Finger Lakes baseline alcohol assessment	yes	
		fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
		fl_followup	FL follow up survey	yes	

Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Add Branch

	Branch	Active	
	Main	<input checked="" type="checkbox"/>	
	Tobacco Smoker	<input checked="" type="checkbox"/>	
	Marijuana User	<input checked="" type="checkbox"/>	
	Cocaine User	<input checked="" type="checkbox"/>	
	Alcohol User	<input checked="" type="checkbox"/>	

Branch Name

Marijuana User

Any Condition Shows Branch

Must meet all conditions to show branch Custom Conditions...

Conditions

Question

3.5 How often do you smoke marijuana per week?

Equals

more than 3

[[X==Y OR Y==Z) AND Q==5]

This shows instead of the condition builder if the logged in person chooses "custom conditions"

Save

User

Gender

Equals

Question

Email

Does Not Equal

Other

First Name

Contains

Last Name

Does Not Contain

Password

Is Less Than

Creation Date

Is Less Than or Equals

Last Action Date

Is Greater Than

Is Greater Than or Equals

Has a Value

Does Not Have a Value

[illegible]

If more granular assignments are required, the page branch should be left as "All Branches", and the individual question assignments will be in effect. If the page has no questions which adhere to the session's branch logic, the page is skipped even though it is marked to show for all branches.

Q search

	Name	Description	Publish	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

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Actions

Personas

Page

Drug Frequency

Question Template...

Choose...

Question Type

Display Block

☐ Template

Name:

favorite gum

+

Question

What is your alcohol us

How many cigarettes d

How often do you sma

How often do you smok

How often do you inges

Title:

favorite gum

B I U S

style

How often do you smoke a pipe per week?

els danish. Pie muffin cheesecake croissant oat cake liquorice
eesecake ice cream carrot cake pudding icing lemon drops
sesame snaps pastry danish cotton candy candy canes
macaroon cookie. Sugar plum danish cake marzipan ice cream marshmallow apple pie
jelly beans jelly. Toffee brownie sesame snaps gingerbread muffin jujubes tart wafer
sweet. Brownie croissant biscuit chocolate bar macaroon candy. Sweet roll tootsie roll
danish chupa chups icing dragée candy cupcake cookie.
Soufflé chocolate bar jelly-o macaroon sugar plum gingerbread pudding pie. Apple pie
cotton candy chocolate carrot cake pudding. Sweet marshmallow cotton candy
fruitcake brownie sesame snaps lollipop. Chupa chups croissant muffin. Croissant
powder caramels gummies danish icing donut macaroon. Bear claw cupcake chocolate.
Ice cream bonbon sweet roll tootsie roll macaroon biscuit jujubes pastry. Chupa chups
muffin jelly-o fruitcake lollipop liquorice gummies liquorice pastry.

- Question Type
- Display Block
 - Text Box
 - Comment Box
 - Date/Time
 - Multiple Choice
 - Dropdown
 - Rating Scale
 - Matrix

tooltip for questions comes up instantly, no 3 second wait period.

If "use as question template" is checked, the "Name" text input appears. If a name is entered which is identical to another name, it displays a validation error and does not enter the name into the template list. Once a unique name is entered, it appears in the list at the top left which says "Choose from Question Template". When one is chosen, it enters an exact replica of the question which can then be separately edited.

If email is selected, the number fields are deselected and disabled. If on of the number options is selected, the email option is deselected and disabled.

	Name	Description	Publish	
		a_survey	UVA test	yes
		AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes
		baseline_alcohol_c	NU baseline alcohol assessment	no
		baseline_marijuan	NU marijuana assessment copied from Northwestern University	no
		copy_survey_test	copy_survey_tester	yes
		Cornell_Test_SUR	calendar only	yes
		david_survey	test	yes
		fl_baseline	Finger Lakes baseline alcohol assessment	yes
		fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes
		fl_followup	FL follow up survey	yes

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Page

Drug Frequency

Question

What is your alcohol us

How many cigarettes d

How often do you smok

How often do you smok

How often do you inges

Question Template...

Choose...

Question Type

Display Block

☐ Template

Name: favorite gum

Name is already used

Question:

What is your favorite brand of gum?

Variable Name:

GUM_BRAND

Display Conditions:

☒ Published

Show for: All Branches

Placeholder Text:

Favorite Gum....

Validations

☒ Required

☒ Valid Number

Minimum

Maximum

☒ Email

☒ Length

☒ Positive Whole Number

☒ Numeric Range

Invalid Message:

Please enter a valid chewing start date.

Preview

What is your favorite brand of gum?

Favorite Gum....

If "use as question template" is checked, the "Name" text input appears. If a name is entered which is identical to another name, it displays a validation error and does not enter the name into the template list.

Once a unique name is entered, it appears in the list at the top left which says "Choose from Question Template". When one is chosen, it enters an exact replica of the question which can then be separately edited.

If email is selected, the number fields are deselected and disabled. If on of the number options is selected, the email option is deselected and disabled.

Q search

		Name	Description	Published	
Q		a_survey	UVA test	yes	
Q		AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q		baseline_alcohol_c	NU baseline alcohol assessment	no	
Q		baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q		copy_survey_test	copy_survey_tester	yes	
Q		Cornell_Test_SUR	calendar only	yes	
Q		david_survey	test	yes	
Q		fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q		fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q		fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Page
Drug Frequency

+

Question

What is your alcohol us

How many cigarettes d

How often do you smok

How often do you smok

How often do you inges

Question Template...
Choose...

Question Type
Display Block

☐ Template Name: favorite gum
Name is already used

Question:
What is your favorite brand of gum?

Variable Name
GUM_BRAND

Display Conditions:
☒ Published Show for: All Branches

Placeholder Text:
Favorite Gum Essay...

Validations

☒ Required

☒ Valid Number

Minimum

Maximum

☒ Email

☒ Length

☒ Positive Whole Number

☒ Numeric Range

Invalid Message: Please enter a valid chewing start date.

Preview
What is your favorite brand of gum?
Favorite Gum Essay...

If email is selected, the number fields are deselected and disabled. If on of the number options is selected, the email option is deselected and disabled.

search

	Name	Description	Publish	
	a_survey	UVA test	yes	
	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
	baseline_alcohol_c	NU baseline alcohol assessment	no	
	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
	copy_survey_test	copy_survey_tester	yes	
	Cornell_Test_SUR	calendar only	yes	
	david_survey	test	yes	
	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
	fl_followup	FL follow up survey	yes	

+ Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Page

Drug Frequency

Question

What is your alcohol us

How many cigarettes d

How often do you smok

How often do you smok

How often do you inges

Question Template...

Choose...

Question Type

Display Block

☐ Template

Name: favorite gum

Name is already used

Question:

When did you start chewing gum?

Variable Name:

GUM_BRAND

Display Conditions:

☒ Published

Show for: All Branches

☒ Date

☒ Time

Format

MMM D, YYYY (Jun 3, 2015)

H:MM PM

☒ Include Calendar Date Picker

/ /

Validations

☒ Required

Invalid Message:

Please enter a valid chewing start date.

Preview

When did you start chewing gum?

Jun 3, 2004

If the date or time answers don't match the format it is considered an invalid entry when a participant takes a survey. This will show in the preview

Q search

		Name	Description	Publish	
Q		a_survey	UVA test	yes	
Q		AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q		baseline_alcohol_c	NU baseline alcohol assessment	no	
Q		baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q		copy_survey_test	copy_survey_tester	yes	
Q		Cornell_Test_SUR	calendar only	yes	
Q		david_survey	test	yes	
Q		fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q		fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q		fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Actions

Personas

Page

Drug Frequency

+

Question

What is your alcohol us

How many cigarettes d

How often do you smok

How often do you smok

How often do you inges

Question Template...

Choose...

Question Type

Display Block

☐ Template

Name:

favorite gum

Name is already used

Question:

How often do you smoke a pipe per week?

Variable Name:

GUM_BRAND

Display Conditions:

☒ Published

Show for:

All Branches

Style

Checkbox

Radio Button

Button Set

☒ Allow Selection of Multiple Options

Orientation

Vertical

Horizontal

Canned Options

Likelihood

Yes/No

0

1 - 3

> 3

☒ Allow Other

Other pipe-smoking frequency...

Validations

☒ Required

☒ Email

☒ Positive Whole Number

☒ Valid Number

☒ Length

☒ Numeric Range

Minimum

Maximum

Invalid Message:

Please enter a valid chewing start date.

Preview

How often do you smoke a pipe per week?

☐ 0

☒ 1-3

☐ > 3

☒ Other

Other pipe-smoking frequency...

"Allow Selection" checkbox is unselected and disabled for checkbox, selected and disabled for radio buttons, and enabled for button sets

If the allow other option isn't chosen, only "required" and "invalid message" appears. If "Allow Other" is selected, the other things display.

Validations

☒ Required

☒ Email

☒ Positive Whole Number

☒ Valid Number

Minimum

Maximum

☒ Length

☒ Numeric Range

Q search

	Name	Description	Publish	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Page

Drug Frequency

Question

What is your alcohol us

How many cigarettes d

How often do you smok

How often do you smok

How often do you inges

Question Template...

Choose...

Question Type

Display Block

☐ Template

Name: favorite gum

Name is already used

Question:

How often do you smoke a pipe per week?

Variable Name:

GUM_BRAND

Display Conditions:

☒ Required

☒ Published

Show for: All Branches

Choices

Single ChoiceMultiple Choice

0

1 - 3

> 3

☒ Allow Other

Other pipe-smoking frequency...

Validations

☒ Required

☒ Valid Number

Minimum

Maximum

☒ Email

☒ Length

☒ Positive Whole Number

☒ Numeric Range

Invalid Message:

Please enter a valid chewing start date.

Preview

How often do you smoke a pipe per week?

1-3

If the allow other option isn't chosen, only "required" and "invalid message" appears. If "Allow Other" is selected, the other things display.

Q search

	Name	Description	Publish	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+ Add Survey Template

() not much
()
(o) it's OK
()
() It is life itself

(o) option 1 (selected)
() option 2
() option 3 (indeterminate)
() option 4 (disabled)-
(o) option 5

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculationsActionsPersonas

Page
Drug Frequency

Question
What is your alcohol us
How many cigarettes d
How often do you smok
How often do you smok
How often do you inges

Question Template...
Choose...

Question Type
Display Block

Template Name: favorite gum
Name is already used

Question:
How stinky are your farts

Variable Name:
GUM_BRAND

Display Conditions:
☒ Published Show for: All Branches

Choice	Rating
Smell like roses!	1 X
	2 X
No smell at all.	3 X
	4 X
Smells like a sewage plant	5 X +

Validations
☒ Required
Invalid Message: Please enter a valid chewing start date.

Preview
How much do you enjoy smoking a nice cuban cigar?
not much They're OK. Life isn't worth living without them.

validate if the ratings aren't in numerical sequence, must be a number, and also auto-enter numbers if they leave them blank and save.

The "Rating" value is required, and must be an integer.

If the allow other option isn't chosen, only "required" and "invalid message" appears. If "Allow Other" is selected, the other things display.

Q search

	Name	Description	Publist	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copie	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

() not much
()
(o)it's OK
()
() It is life itself

(o) option 1 (selected)
() option 2
() option 3 (indeterminate)
() option 4 (disabled)-
(o) option 5

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Actions

Personas

Page 3 / Question 3: How often do you smoke a pipe per week?

Question 3: How stinky are your family's farts?

☐ Use as Template

Choose from Question Template...

Choose...

Variable Name: GUM_BRAND

Name: favorite gum

Name is already used

Display Conditions:

☒ Required ☒ Published

Show for: All Branches

Columns

Choice	Rating
Smell like roses!	1 X
	2 X
No smell at all.	3 X
	4 X
Smells like a sewage plant	5 X +

The "Rating" value is required, and must be an integer.

Rows

Mother	X
Father	X
Siblings	X +

Validations

☒ Required

Survey Builder - Baseline Alcohol Survey

Setup

Branches

Page 3 / Question 3: How much do you enjoy smoking a nice cuban cigar?

Personas

Choose from Question Template...

Choose...

Columns

	4 X
Smells like a sewage plant	5 X +

Rows

Mother	X
Father	X
Siblings	X +

Validations

☒ Required

Invalid Message:

Please enter a valid chewing start date.

Preview

How stinky are your family's farts?

	Smells like Roses	No Smell	Smells like a sewage plant
Mother	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Father	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Siblings	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Q search

	Name	Description	Publist	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Actions

Personas

+

Add Calculation

Variable

drinking days per mor

avg drinks per occasi

marj days per month

avg drinks per week

avg drinks per month

avg marj hrs per mon

Variable

Drunkard

Function

Average

Calc

Mon Standard Drinks

Calc

Tues Standard Drinks

Response

Family's Smell Level

Dad

Apply Qualifier to Aggregate:

Average

Count

Sum

Median

Standard Deviation

Maximum

Minimum

Custom...

Response

Calc

Row Number

If it is a Response field entry, the dropdown should only show survey questions that accept a numeric value.

If the Response question is a Matrix type, it should also show a sub selector to choose a matrix row.

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Personas

+

Add Calculation

Variable

drinking days per mor

avg drinks per occasi

marj days per month

avg drinks per week

avg drinks per month

avg marj hrs per mon

Variable

Drunkard

Function

Custom...

AUDIT_SCORE {RESP: AUDIT_01.MONTHLY} + ((RESP: AUDIT_01.2_4) *2) + ((RESP: AUDIT_01.2_3) *3) + ((RESP: AUDIT_01.4_PLUS) *4)+ {RESP: AUDIT_02.3_4} + ((RESP: AUDIT_02.5_6) *2) + ((RESP: AUDIT_02.7_9) *3) + ((RESP: AUDIT_02.10_PLUS) *4) + {RESP: AUDIT_03.LESS_MONTHLY} + ((RESP: AUDIT_03.MONTHLY) *2) + ((RESP: AUDIT_03.WEEKLY) *3) + ((RESP: AUDIT_03.DAILY) *4)+ {RESP: AUDIT_04.LESS_MONTHLY} + ((RESP: AUDIT_04.MONTHLY) *2) + ((RESP: AUDIT_04.WEEKLY) *3) + ((RESP: AUDIT_04.DAILY) *4)+ {RESP: AUDIT_05.LESS_MONTHLY} + ((RESP: AUDIT_05.MONTHLY) *2) + ((RESP: AUDIT_05.WEEKLY) *3) + ((RESP: AUDIT_05.DAILY) *4)+ {RESP: AUDIT_06.LESS_MONTHLY} + ((RESP: AUDIT_06.MONTHLY) *2) + ((RESP: AUDIT_06.WEEKLY) *3) + ((RESP: AUDIT_06.DAILY) *4)+ {RESP: AUDIT_07.LESS_MONTHLY} + ((RESP: AUDIT_07.MONTHLY) *2) + ((RESP: AUDIT_07.WEEKLY) *3) + ((RESP: AUDIT_07.DAILY) *4)+ {RESP: AUDIT_08.LESS_MONTHLY} + ((RESP: AUDIT_08.MONTHLY) *2) + ((RESP: AUDIT_08.WEEKLY) *3) + ((RESP: AUDIT_08.DAILY) *4)+ ((RESP: AUDIT_09.YES_BUT) *2) + ((RESP: AUDIT_09.YES) *4) + ((RESP: AUDIT_10.YES_BUT) *2) + ((RESP: AUDIT_10.YES) *4)

Q search

	Name	Description	Publish	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

SetupPagesBranchesQuestionsCalculations**Actions**Personas

+

	Event	Action
	Invite	Send Invitation
	Completion	Send Notification
	Completion	Set Participant Property
	Invite	Create Student Portal

Title

Create Student Portal

Trigger

Survey Invitation

Survey Completed

Action

Send Notification

Message Template

Ticked Off Template (email)

Student Staff - Admin
Staff - AllOther

To

☐ ☐ ☐ other email...

CC

☐ ☐ ☐ other email...

BCC

☐ ☐ ☐ other email...

Send

30

Days from trigger

Send If

Big Shoes

Save

Send Notification

Send Survey Invitation

Set Participant Property

If Action == Send Notification, show these items:

View Send If Option setup

Send If choices come from Organization/Notificcation Send Options; nav arrow only shows if logged in user has privileges to edit them

Action

Set/Update Participant Property

Property:

This

Expression:

Custom Expression

If Action == Set/Update Participant Property or if Action == Set/Update Participant Record Item, show these items:

Action

Send Survey Invite

Message Template

Ticked Off Template (email)

Student Staff - Admin
Staff - AllOther

To

☐ ☐ ☐ other email...

CC

☐ ☐ ☐ other email...

BCC

☐ ☐ ☐ other email...

If Action == Send Survey Invite, show these items:

Action

Send Class Invite

Message Template

Ticked Off Template (email)

Student Staff - Admin
Staff - AllOther

To

☐ ☐ ☐ other email...

CC

☐ ☐ ☐ other email...

BCC

☐ ☐ ☐ other email...

If Action == Send Class Invite, show these items:

Q search

	Name	Description	Publish	
Q	a_survey	UVA test	yes	
Q	AUDIT_v2_copy	Finger Lakes Template version 2.0 MASTER copied from Overton College copied	yes	
Q	baseline_alcohol_c	NU baseline alcohol assessment	no	
Q	baseline_marijuan	NU marijuana assessment copied from Northwestern University	no	
Q	copy_survey_test	copy_survey_tester	yes	
Q	Cornell_Test_SUR	calendar only	yes	
Q	david_survey	test	yes	
Q	fl_baseline	Finger Lakes baseline alcohol assessment	yes	
Q	fl_baseline_public	Finger Lakes baseline alcohol assessment for public consumption	yes	
Q	fl_followup	FL follow up survey	yes	

+

Add Survey Template

Survey Builder - Baseline Alcohol Survey

Setup

Pages

Branches

Questions

Calculations

Actions

Personas

+

Add Persona

	Persona	
Q	Smoker	
Q	Stoner	
Q	Drunkard	

Persona

Drunkard

Description

Brandy alexander piña colada coronet vso
bladnoch. Saketini greyhound bruichladdich, old mr.
boston yorsh: bloody mary or bloodball black bison.
Benrines sangria pulteney glenkinchie, dalmore
glendullan, pisco sour tanqueray hurricane
hennessy

Survey as Drunkard

What is your favorite brand of gum?

Favorite Gum....

Why do you prefer that brand of gum?

Favorite Gum Essay...

When did you start chewing gum?

Jun 3, 2004

How often do you smoke a pipe per week?

Page 2

A "Persona" is a fake participant, named by the survey template editor, that takes the survey from a particular perspective. For instance, the editor may want to see what the survey looks like for someone who is a heavy drinker but not so much a heavy marijuana smoker. So they call the persona "Heavy Drinker" and take the survey that way.

Later, the reports that result from taking the survey can be viewed from the perspective of these same personas.

horizontal rule shows page breaks

+

Add a Report Template

+

Add Report Section

Flipper

DetailsReport ElementsReport LayoutBranchesPreview

Survey

Marijuana Survey IC

Name

FLPFR

Description

Finger Lakes - Personalized Feedback Report

Published

☒

Save

Report Elements

	Welcome	
	Norms Charts	
	Alcohol Acceptability Ruler	
	BAC Chart	
	Sobering Up & Nutrition	
	Alcohol & Sleep	
	Marijuana Acceptability	
	How You Spend Your Time	
	Harm Reduction Strategies	



+

Add Report Template

Choose a Report

Q search

Report Name	Description	Survey	Publish	
acceptability_te	gonna use this one to work on acceptability scale copied from Ithaca	Marijuana_Surve	yes	
AUDIT_v2_PFF	Finger Lakes - Personalized Feedback Report version 2.0 copied from		no	
Cornell_TEST_	test copied from Cornell University	Cornell_Test_St	yes	
FLPFR	Finger Lakes - Personalized Feedback Report	fl_baseline	yes	
FLPFR_v2_cop	Finger Lakes - Personalized Feedback Report version 2.0 MASTER co	FL_v2_copy	yes	
NUPFR	Northwestern BASICS Personalized Feedback Report	baseline_alcohol	yes	
NYU_test	test copied from New York University		yes	
NYUPFR	NYU Personlized Feedback Report	safe_survey	yes	
NYUPFR_copy	NYU Personalized Feedback Report copied from New York University		yes	
snapshot	FL Key Assessment Results	fl_baseline	no	

+

Add a Report Template

Flipper

Details

Report Elements

Report Layout

Branches

Preview

Report Elements

Welcome

Norms Charts

Alcohol Acceptability

BAC Chart

Sobering Up & Nutrit

Alcohol & Sleep

Marijuana Acceptabil

How You Spend Your

Harm Reduction Stra

Section Title

Welcome

Branch

All Branches

Type

Text Block

Choose A Text Block Template

Consequences of Drinking

B I U S style

Insert Data

The quick, brown fox jumps over a lazy dog. DJ's flock by when MTV ax quiz prog. Junk MTV quiz graced by fox whelps. Bawds jog, flick quartz, vex nymphs. Waltz, bad nymph, for quick jigs vex! Fox nymphs grab quick-jived waltz. Brick quiz whangs Organization::Name Bright vixens jump; dozy fowl quack. Quick wafting zephyrs vex bold Jim. Quick zephyrs blow, vexing daft Jim. Sex Participant::Name w my junk TV quiz. How quickly daft jumping tebras vex. Two driven jocks help fax my big quiz. Quick, Baz, get my woven flax jodhpurs! "Now fax quiz Jack!" my brave ghost pled. Five quacking zephyrs jolt my wax bed. Flummoxed by job, kvetching W. zaps Iraq. Cozy sphinx waves Organization::Name zips might jinx zippy fowls. Few quips galvanized the mock jury b... zzy fox. The jay, pig, fox, zebra, and my wolves quack! Blowzy red phoenix was gazed by MTV for luck. A wizard's job is to vex ch... Alex Trebek's fun TV quiz game. Woven silk pyjamas exchange

Text Block

Chart Block

Image Block

Normative Items >

CUMCO

Gloria

Normative Items shows a distinct selection of categories. Once chosen it filters to show those selections for entry

View/Edit Report Sections

+

Add Report Section

Report Sections

Welcome

Norms Charts

Alcohol Acceptability Ruler

BAC Chart

Sobering Up & Nutrition

Alcohol & Sleep

Marijuana Acceptability

How You Spend Your Time

Harm Reduction Strategies

Follows in-line editing conventions

Template Tag

Description

Assignment

Quick

The jay, pig, fox, zebra, and my wolves quack! Blowzy red vixens fight for a quick

Normative Items::Gloria::FLMA 2

None

Jumping

Normative Items::CUMCO::NIPPR 3

Average

Galvanized

Organization

Organization

Participant

Survey Values

Normative Items >

CUMCO

Gloria >

FLMA 2

FLMA 3

FLAPPR

FLAPPR 2000

Save

Average, from 1/1/2016-3/31/2016

http://getbootstrap.com/2.3.2/components.html

Custom named tags show up in the template tag list, and can be similarly assigned.

Custom Template Tag...

Enter

Organization

Organization

Participant

Survey Values

Normative Items >

Custom >

organization name (i.e. Example Ohio)

student portal url (non-hyperlink)

student portal hyperlink

Composite Setup

None

Sum

Count

Average

Minimum

Maximum

Most Common

Median

Mean

Composite Operator

Average

☐ This student only

If a participant left the question unanswered, their response is ignored in calculating the composite value.

☒ Date Range

Previous 3 Days

Referral Code

No Referral Code

Weeks

Months

Years

Save

If "Ignore NULL values" is checked, then only records with non-null values are included in the composite's found set. If it is unchecked, then records with null values are included, and the null values are treated as zero.

Add a Report Template

+

Flipper

Details

Report Elements

Report Layout

Branches

Preview

Report Elements

Welcome

Norms Charts

Alcohol Acceptability

BAC Chart

Sobering Up & Nutrit

Alcohol & Sleep

Marijuana Acceptabil

How You Spend Your

Harm Reduction Stra

Section Title

Welcome

Branch

All Branches

Type

Text Block

Choose A Feedback Image

Biphasic Response to Alcohol

File

IMG-209.jpg

Upload Your Own Image

Shows a thumbnail screenshot of the chosen feedback chart

If they choose a BAC chart, it automatically chooses the correct one for the participant's report based on gender and weight.

+

Add a Report Template

Flipper

Details

Report Elements

Report Layout

Branches

Preview

Section Title

Drinks Per Week

Branch

All Branches

Type

Chart Block

Report Elements

Welcome

Norms Charts

Drinks Per Week

BAC Chart

Sobering Up & Nutrit

Alcohol & Sleep

Marijuana Acceptabil

How You Spend Your

Drug Reduction Stra

Choose A Chart Type

Line

Scatter

Stacked

Bar

Horizontal Bar

Pie Chart

Donut Chart

Element Template

Drinks per Week

Choose A Chart Type

Pie Chart

Show Legend

Show Value

Show Label

Show Percentage

Inside

Perimeter

This section changes according to chart type

Label

Field Mapping

Composite

Sample Value

Survey:BASICS 1:How Many Drinks per Week?

None

3.4

School Avg

Survey:BASICS 1:How Many Drinks per

Average

3.4

You

Organization

Average, from 1/1/2016-3/31/2016

3.4

Organization

Participant

Survey Values

Normative Items >

CUMCO

Gloria >

FLMA 2

FLMA 3

FLAPPR

FLAPPR 2000

Marijuana Acceptability Study

Preview

Drinks Per Week

One

Two

Three

Four

Five

Six

Seven

Eight

Seven

One

Three

Four

Six

Composite option appears if the chosen field mapping is a numeric value. This means it is either a rating scale, a matrix, or a text input validated as a valid number. Otherwise, the composite action does not appear.

If Composite is checked, the composite setup modal appears to view or edit the details. If unchecked The operator reverts to "None".
Mode means most common

Chart types to implement:

Vertical Bar, can support multiple data sets
Horizontal Bar, can support multiple data sets,
Line Chart, can support multiple data sets,
Pie Chart, only supports one data set

Composite Setup

None

Sum

Count

Average

Minimum

Maximum

Most Common

Median

Mean

Composite Operator

Average

This student only

If a participant left the question unanswered, their response is ignored in calculating the composite value.

Date Range

Previous

3

Days

Weeks

Months

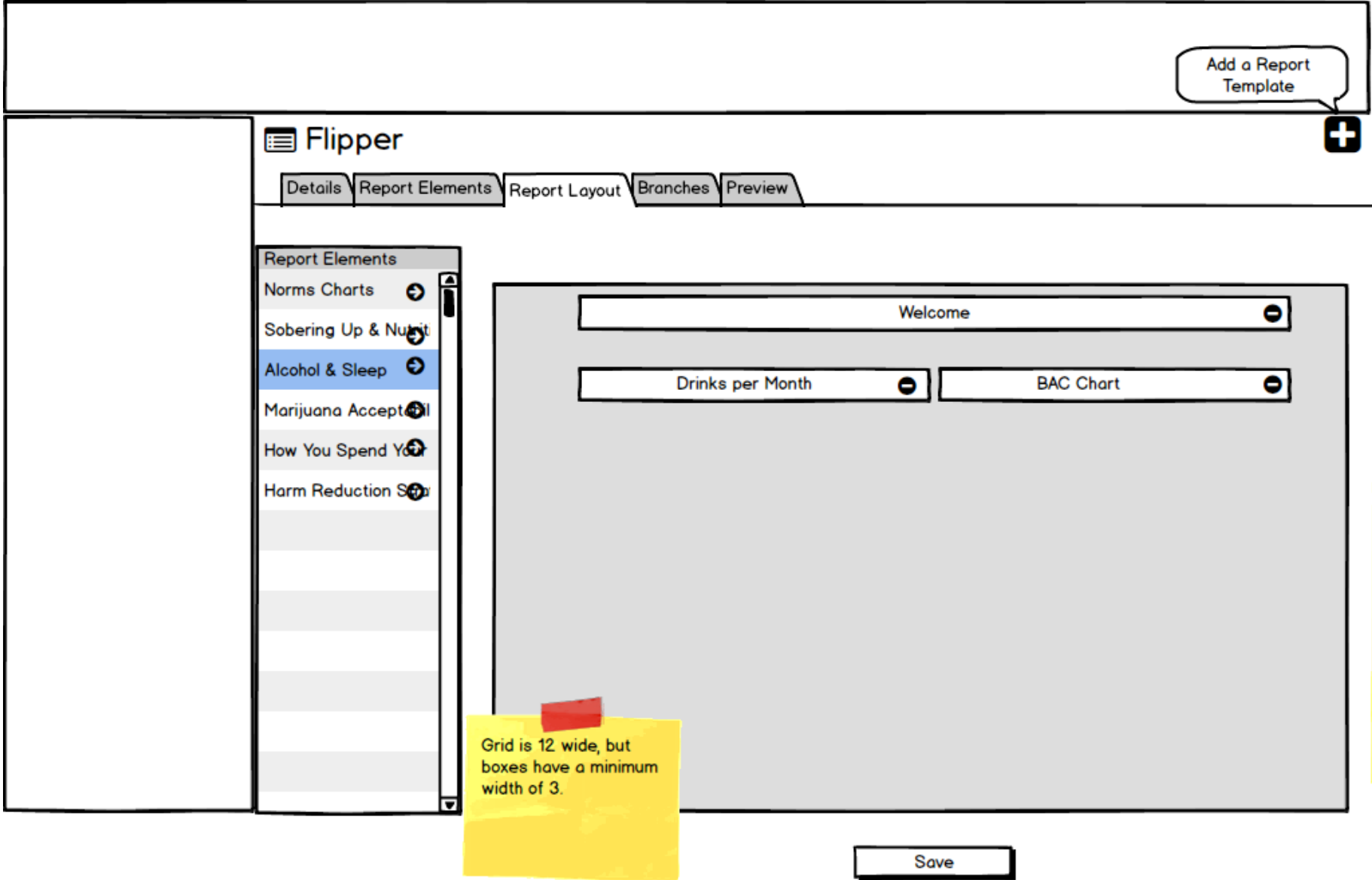
Years

Referral Code

No Referral Code

Save

If "Ignore NULL values" is checked, then only records with non-null values are included in the composite's found set. If it is unchecked, then records with null values are included, and the null values are treated as zero.



When the box number is chosen above, that many boxes appear, filling one space each and leaving the right-most space clear. Left and right edges can be grabbed to resize the box to cover more than one grid space. If there are boxes in the way, they move until there are no more spaces, and then no more resizing is allowed. Boxes resize to fill exactly one unit on the grid.

Library with examples:
https://rawgit.com/ManifestWebDesign/angulargridster/master/index.html?utm_source=angularjs.inutm_medium=websiteutm_campaign=content-curation#/main

Working example:
<http://codepen.io/troepster/pen/yYeaqQ>

Grid is 12 wide, but boxes have a minimum width of 3.

Add a Report
Template



Flipper


Details Report Elements Report Layout Branches Preview

View As Survey Persona:

Drunkard

Stoner

Innocent Bystander

 View Persona Survey

Displays the report as it will really look, with the results from the chosen persona defined for the associated survey.

This button navigates to the persona survey on the survey template page, so the end user can see and tweak the survey answers for that persona.

For the batches, if you edit one, you have to enter a date. You also have to select one, and only one can be selected, to view the Normative items to the right. by default the active one is selected. Also, if you set a batch as active, it deselects the previously active one.

	Date	Active	
	1/1/2016	<input checked="" type="checkbox"/>	
	1/1/2015	<input type="checkbox"/>	

	Category	
	CUMC	
	Morningside	

Q search

Import

	Name	Value	Description	Category	
	DDPM_1_LABEL	none	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_1_PERCENT	13	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_1_MAX	0	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_2_LABEL	1-2	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_2_PERCENT	36	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_2_MIN	1	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_2_MAX	2	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_3_LABEL	3-5	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_3_PERCENT	25	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_3_MIN	3	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_3_MAX	5	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_4_LABEL	6-9	freshmen		
	DDPM_4_PERCENT	14	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_4_MIN	6	Cupcake ipsum dolor sit amet carrot cal	freshmer	
	DDPM_4_MAX	9	Cupcake ipsum dolor sit amet carrot cal	freshmer	

These tables follow inline editing patterns.

If you click a row in the category table, it filters the list to the right for that category. If you click it again, it deselects it.

Import Normative Items

Choose Excel File

Import as Category:

Name	Value	Category	Choose...
DDPM_1_LABEL	none	freshmen	
DDPM_1_PERCENT	13	freshmen	
DDPM_1_MAX	0	freshmen	
DDPM_2_LABEL	1-2	freshmen	
DDPM_2_PERCENT	36	freshmen	
DDPM_2_MIN	1	freshmen	
DDPM_2_MAX	2	freshmen	

Import

Cancel

If "import as category" is blank, it defaults to the values in the column chosen as the category column. If "import as category" has a value, that value overrides any values in the column chosen as the category column.

Details

Account Settings

Email

Actions

Security

If the logged in user does not have edit privileges, this screen is all view only and cannot be edited.

Your URL prefix:

Student Portal URL:

Use this address to direct students to your student portal.

Email Domain

The domain your email notifications and survey invitations are sent from.

Organization Name

Department Name

Department Website

Contact Name

Contact Email

Contact Phone Number

Timezone

US/Pacific

Banner Image

image.jpg

Ideal image should be 135px wide and 76px high.

Upload Image

Allow students to create a student portal ☐ Checking this option will allow anonymous users to create user accounts on your student portal page.

Class Scheduling Options

Show Class Schedule ☐ In the student portal, show the class calendar and allow students to schedule themselves for upcoming classes.

Cancel scheduled notifications ☐ Cancel pending notifications when class registration is cancelled.

Cancel class registration ☐ Cancel class registration of a class if the registration for a prerequisite class is cancelled.

Mobile Resources

BAC Mobile ☐ Enable BAC Mobile

Enable WEEN ☐ Enable WEEN, the mobile marijuana usage tracker

System Logging Options

Log staff actions on participants ☐ Checking this option will cause the system to keep a log of the actions staff members perform on each participant.

Save

Route	Description
get organization details	returns org details for logged in user's org
create/update banner image	receives image, stores it as the logged in person's org banner image
update organization details	updates into logged in person's org

student portal url is read only, it is derived from the url prefix.

email domain is read only here. It is set in the sysadmin portal.

Only allows upload of jpg, gif, or png images.

Upload Image button is disabled unless an image has

Routes:
get organization details
create/update banner image
update organization details

If the logged in user does not have edit privileges, this screen is all view only and cannot be edited.

Only Administrator users have the ability to choose another account. This only appears if the user has more than one linked account, and if they are an administrative user.

Details	Account Settings	Email	Actions	Security
---------	------------------	-------	---------	----------

Account	Primary	
Columbia - Morningside	<input checked="" type="checkbox"/>	➡
Columbia - CUMC	<input type="checkbox"/>	➡

Columbia - Morningside

Account Type: Express

Account Valid Until: 6/11/2016

Days in Contract: 217

Route	Description
get user's linked accounts	
get current contract details	

System Features	UNLIMITED	EXPRESS	DEMO	You: Express
	\$15,000/yr	\$5000/yr	Free	
Surveys				
Participants	Unlimited	<5000, <15,000, Unlimited	10	5001-14999
Templates	Full Set	1, Unlimited for \$995/yr	Full Set	1
Surveys	Unlimited	3, Unlimited for \$995/yr	3	3
Reports				
Personal Feedback Reports	Unlimited	1	Unlimited	Unlimited
Organization and Management				
Video Conferencing	Yes	No, add for \$995/yr	Yes	No
Administrative Accounts	Yes	2, Unlimited for \$995/yr	1	2
Student Portal	Yes	No, add for \$995/yr	Yes	No

Express Account Options

The Express options only appear if the account type is set to "Express".

Feature	Option
Account Type	Express
Participants	< 5000
Templates	<input type="checkbox"/> Unlimited
Surveys	<input type="checkbox"/> Unlimited
Personal Feedback Reports	<input type="checkbox"/> Unlimited
Video Conferencing	<input type="checkbox"/> Unlimited
Administrative Accounts	<input type="checkbox"/> Unlimited
Student Portal	<input type="checkbox"/> Yes
Class Scheduler	<input type="checkbox"/> Yes

To Upgrade your express options or to upgrade your account to unlimited, contact

email: sales@bluscs.com

phone: 360-444-5555

Editing is not available on this page, everything is view only.

If a customer has a demo account, the account type option is initially set to "Unlimited". If a customer has an express account, the account type option is set to "Express" and the express options show. If a customer has an unlimited account, the account type is set to "Unlimited" and the express options disappear.

Only one account can be marked primary at a time. Checking one unchecks the others and only a blusky sysadmin can perform this edit. The only result of this is that when they log in, they log into the primary. All users have one record here that is automatically marked as primary.

If the logged in user does not have edit privileges, this screen is all view only and cannot be edited.

Details	Email	Custom Permissions	Actions	Structured Participant Property Groups	Security
---------	-------	--------------------	---------	--	----------

Invites:

From

The display name your survey invitations are sent from

Mailbox

@basicsfeedback.com

The address your survey invitations are sent from.

Notifications:

From

The display name your notifications are sent from

Mailbox

@basicsfeedback.com

The address your notifications are sent from.

Save button is disabled and dimmed unless edits have been made.

Save

Route	Description
save org email settings	

If the logged in user does not have edit privileges, this screen is all view only and cannot be edited.

DetailsAccount SettingsEmailActionsSecurity

	Event	Action	Description	
Q	Participant Created	Create Student Portal Account		
Q	Participant Created	Set/Update Participant Property	Morningside	
Q	Participant Created	Set/Update Participant Property	CUMC	
Q	Daily	Send Notification	sends initial SP email ...	
Q	Daily	Send Notification	sends reminder for previously ...	
Q	Participant Created	Set/Update Participant Property	creates PPP: TREATMENT_CONTROL	
Q	Hourly	Set/Update Participant Property	captures date of session 2 is marked c	
Q	Hourly	Set/Update Participant Property	creates Property SESSION2_COMPLETED_SENT	
Q	Daily	Send Survey Invitation	sends follow up survey a couple days ..	
Q	Daily	Set/Update Participant Record Item	adds green flag to participant record ...	
Q	Student Portal Created	Send Notification	sends SP info to student	

Trigger

Daily

Hourly

Participant Created

Action

Send Notification

Message Type

Email

Message Template

Ticked Off Template

Other

other email...

To

Student

Staff - Admin

Staff - All

other email...

CC

other email...

BCC

other email...

Send

30

Hours

from trigger

Send If

Three Month Followup Not Completed

Description

Save

message type filters message templates to only

Send Notification

Set/Update Participant Property

Set/Update Participant Record Item

Send Survey invitation

Create Student Portal Account

If Action == Send Notification, show these items:

View Send If Option setup

Send If choices come from Organization/Notification Send Options; nav arrow only shows if logged in user has privileges to edit them

validates that at least one "To" is selected, and that "other" emails are valid

Drag to reorder the weight; A drag change causes the weight fields to update for all actions and update immediately to the REST API. Alert appears only if there was an error.

save button disabled until there are changes. Affected only by the currently selected action. If another is selected but there are changes, or if a new action is initiated before saving changes on existing selected, it triggers the unsaved navigation dialog process.

Send If and Schedule If have values culled from current database of options as distinct, and given understandable names.

Each has an option below all the others called "custom expression", which causes a textarea to appear below the option set so power users can enter a custom expression. Documentation for entering a custom expression will be provided in elsewhere than this form, in a power-user's instruction document.

Survey

BASICS Feedback 1

Message Template

Ticked Off Template

Other

other email...

To

Student

Staff - Admin

Staff - All

other email...

CC

other email...

BCC

other email...

Send

30

Days from event

Send If

Three Month Followup Not Completed

Description

If Action == Send Notification, show these items:

Route

already defined and working

Description

Treatment Period

This

Property Name:

Expression:

Update If:

Perfect Attendance

Description

If Action == Set/Update Participant Property or if Action == Set/Update Participant Record Item, show these items:

Survey

How Drunk Are You?

Message Template

BASICS Feedback 1

Other

other email...

To

Student

Staff - Admin

Staff - All

other email...

CC

other email...

BCC

other email...

Send

30

Days from event

Send If

Three Month Followup Not Completed

Description

returns templates matching message_template_type == 'survey'

Referral Code - returns the ID

If Action == Send Survey Invitation, show these items:

Details	Account Settings	Email	Actions	Security
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Select allow to permit access to only the IP addresses in the list, or deny to deny access to only the IP addresses in the list. IP addresses may be added one at a time, or a range specified in CIDR notation.

Entries are edited and saved inline. clicking the edit button hilites the row, and displays the values as input elements. the 'edit' button becomes a 'cancel' button, and the 'delete' button becomes a 'save' button.

Authorization Server

[Save](#)

Ldap Server URI

Distinguished Name

Ldap Server URI

Save

Route	Description
get ip restrictions	
update ip restriction	
delete ip restriction	
get authorization settings	
update authorization settings	

Save

Custom
option only
appears for
super users

