



# Retention Data Center

## Users Guide

For Additional information or questions, contact:  
[StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com)

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## Preparing to Setup your Survey Administration

### How do I get started?

- Review the resources located in the “**Resource Library**” located in the lower left corner of the Retention Data Center. Download the key documents within the resource library (including the Coordinators Guide/Advisors Guide (whichever is more relevant for your role) and the Scale Description).
- Within the Resource Library, we have a **video tutorial** for a quick review of the Retention Data Center. Play around! Follow along with the video tutorial and think about how you might want to filter, sort, and/or export your data.
- **Review the table of contents** of this document. Review the question responses that are relevant for you at this time. The Users guide has almost everything you need to know when it comes to using the Retention Data Center.
- Once you have a basic “lay of the land”, you can **customize your survey**.
- Once your survey is setup with your preferences, you are set to **launch the survey**.
- Optional – Preloading a student file with first name, last name, student ID, email address, date of birth and potentially grouping fields (this file can be uploaded at any time and is not required at all if you wish).

### Do you have best practices for implementing the survey?

Yes, we have a webpage dedicated to additional information regarding this. They can be found in the Resource Library within your Retention Data Center account.

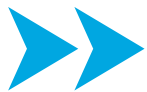
### How do you login to your Retention Data Center account?

To access the Retention Data Center, Log In at our Web site, [www.ruffalonl.com/myRuffaloNL](http://www.ruffalonl.com/myRuffaloNL), and access your myRuffaloNL account. Once logged in, select Retention Data Center from the box titled myApplications.

If you haven’t received myRuffaloNL access information in a separate e-mail or if you have forgotten your password, click “Forgot your login.” Enter your email address and your password will be sent to you instantly.

If you do not see the myApplications button, email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with a screenshot of the screen you see once logged in.




### Can my colleagues access our Retention Data Center account?

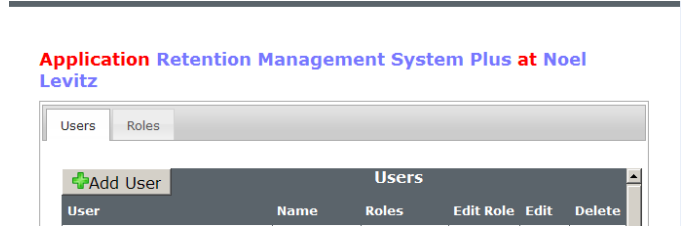


You may create accounts for as many colleagues as you need to access the Retention Data Center. Their account login information will be their email address and a password that you assign. Be sure to regularly check who has access to your account!

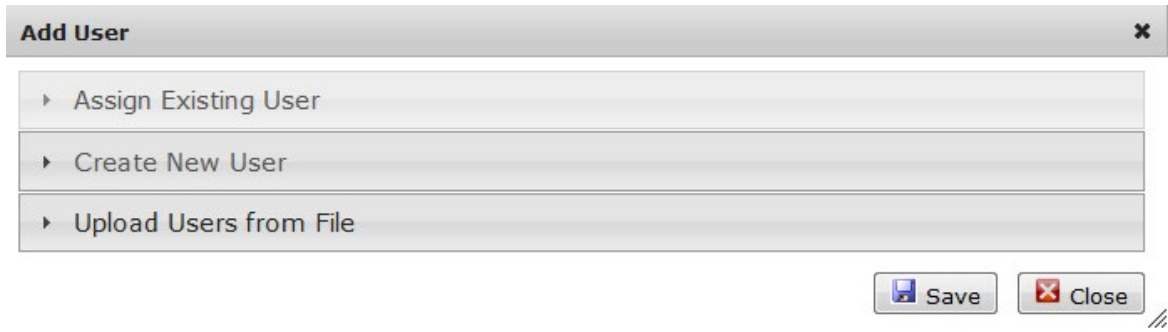
#### To give access to colleagues:

1. Select Configuration (top right corner)
2. Select User Administration

-  **Add User** - Grant access to the Data Center.
-  - Remove access to the Data Center.
-  - Edit the record or change the assigned role.



3. Select  **Add User**



4. Confirm user is not already in the drop down menu 'Assign Existing User'. This is an indication the person already has established a myRuffaloNL.com account. If found, select the name and assign a role (outlined below).

If not found, use *Create New User* or *Upload Users from File* for multiple entries.

Once the users account is created, the user can login with their email address and password. If not provided with a copy of their password, they can simply select forgot my login at [www.ruffaloNL.com](http://www.ruffaloNL.com) and a copy of their password will be sent to them.

**Create New User**

E-mail	<input type="text"/>
Password	<input type="text" value="#Welcome1"/>
Comments	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>

**To Create New User**

1. Complete the following fields in the box presented:

- User Name:* user e-mail address
- Password:* default password (change recommended)
- Comments:* brief note about entry (optional)
- First Name:* user first name
- Last Name:* user last name
- Select Role: *Select only one* of the roles identified below

- 2. Select Role: Select only one of the roles identified below.
- 3. Save your work.

The user can now access the Retention Data Center through their secured myRuffaloNL account by logging in at <https://client.ruffalonl.com>. If password for user is unknown, they can select “Forgot my Login” and a password is sent to the e-mail address on file.

### Upload Users from file

1. Create File (typically created in excel) and save as Windows CSV (comma separated/comma delimited). The file format is as follows (if you do not wish to provide a comment, leave the column blank):

Column (if using excel)	Field	Max Length	Format	Record Verification
A	User E-mail	60	Required - This will be the user's Login ID. Must be a valid e-mail address.	✓
B	Default Password	50	Required - Alphanumeric and special characters allowed.	✓
C	User First Name	100	Required	✓
D	User Last Name	100	Required	✓
E	Comments	255	Optional	
F	Role	255	Required - options include: Coordinator, Global Advisor, Limited Advisor, Global Data Analyst, Limited Data Analyst, Technical Coordinator.	✓

2. Browse to your saved file and select Upload.

### What do the different Roles mean for myRuffaloNL accounts?

When asked what roles you should assign your users to, I ask:

1. Do you want them to have access to everything in the Retention Data Center?
  - a. If Yes, then Coordinator (Note, if you are restricting access of some users so they only see subsets of students and not all, but you want someone to have access to ALL students, you will want to assign them as Coordinator)
  - b. If No, as the next two questions
2. Do you want them to have access restricted students (students that indicate ‘no’ they don’t want to share their results with anyone other than the coordinator on the final question of the survey).
  - a. If Yes, then Global
  - b. If No, then Limited
3. Do you want them to have access to the Coordinator Report, Export Data, and Summary Results?
  - a. If Yes, then Data Analyst
  - b. If No, the Advisor

	Dashboard	Access can be limited	Restricted Reports	Student Report	Advisor/Counselor Report	Coordinator Report	Summary Reports	E-mail Student	Edit Student Profile	Advisor Notes	Export Data	Import Data	Survey Creation/Modification	Configuration button
Purchaser	X		X	X	X	X	X	X	X	X	X	X	X	X
Coordinator	X		X	X	X	X	X	X	X	X	X	X	X	X
Global Data Analyst	X	X	X	X	X	X	X	X	X	X	X			
Limited Data Analyst	X	X		X	X	X		X	X	X	X			
Global Advisor	X	X	X	X	X	X		X	X	X				
Limited Advisor	X	X		X	X			X	X	X				
Technical Coordinator	X										X	X		

### How can I change my survey end date?

If you need to update your end date, you will need to contact [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com). We cannot push your end date past 3/31/20XX unless we receive a new order for the next year.

### How long does the College Student Inventory survey take to complete?

Form B: Approximately 20 minutes

Form C: Approximately 15 minutes

### Does the survey require additional programming on our end?

No additional programming is needed. You might consider adding the URL link as a favorite for easy student access, but no programming is needed.

The survey is compatible with all major web browsers.

Reports do not generate well on mobile devices. I would suggest using a desktop when accessing reports from the Retention Data Center.

Student access to the survey is done via a URL link. You can use a standard survey URL or personal URL link (PURL). Neither of which require any programming in order for the student to use.

### Can I customize with our logo?

Yes, in the upper right corners of the Retention Data Center, click on the “Configurations” Survey Theme button. You can browse to your image, adjust the color banners on the survey and select Apply Theme. If you don’t like the outcome, just try again.

Notes: an image file must be in the format of JPEG, TIFF, PNG that is not wider than 231 pixels and not higher than 65 pixels.

### Can I change standard items on the survey?

No, you cannot change standard items on the survey. This includes the demographics on the login page. They cannot be changed. We also cannot modify the order of the survey questions. All custom question will appear after all standard items are complete.

### Are all questions on the survey mandatory?

All questions on the survey are mandatory. With the exception of the two items listed below:

- Student ID and phone number on the login screen
- Parent’s education on the demographics portion of the survey.

Note: The survey does not indicate these are not mandatory and it cannot be noted on the survey. You can mention it in your email or modify the text on the login screen that appears after Student ID or Email Address.

The text I used is: Please note, on the demographics portion of the survey, there are two questions related to your parent’s education. If either of these questions do not apply to you, you may leave them blank and proceed.

Please enter the following information:

First Name:	<input type="text" value="Preview"/>
Middle Initial:	<input type="text"/>
Last Name:	<input type="text" value="Student"/>
Student Identification Number:	<input type="text" value="A123456"/>
Date of Birth:	<input type="text" value="Jul"/> <input type="text" value="21"/> <input type="text" value="1996"/>
Gender:	<input type="text" value="Female"/>
Email Address:	<input type="text" value="preview@institution.edu"/>

Please note, on the demographics portion of the survey, there are two questions related to your mother/fathers education. If either of these questions do not apply to you, you may leave them blank and proceed.



## Setting up your Survey Administration

### How do I setup my survey?

You do not setup your survey. In order to have access to a survey, an [order](#) will need placed. If you have already ordered for the year, reach-out to [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) and let us know you need an additional survey setup.

Once your order is processed, you should expect your survey details in the next week or so. At that point, you can customize your survey.

### How can I customize my survey?

**Report Access:** Select if students have access to their report upon survey completion.

**Grouping fields:** Grouping students with demographical fields provides additional sorting and filtering opportunities beyond what is collected through the standard items of the surveys.

Up to 5 categories can be used; commonly used are Academic Advisor, FYE Instructor, Residence Hall, Indicated Major, etc.

**Limited access to others on campus.** This allows you the ability to designate others on campus for access to specific groups of student records (outlined above) with limited access to areas of the Retention Data Center and reports available for students.

**Survey entry page:** Allows you to request specific information for Id and e-mail. Example: “Please enter your 7-character student Id here. (W234567)” or “Enter your university.edu address here”.

**Custom Questions:** These are multiple choice questions and require a single selection response from the student. They appear at the end of the survey, after the standard items. You can have approximately 100 total questions in your account for the life of your account. You can provide as many response options as necessary to create a rating scale (1 Strongly Agree – 7 Strongly Disagree) to a Yes/No question. Custom questions are also filterable and exportable for further analysis. Once used, custom questions CANNOT be modified as it will affect historical data.

**Student Report narrative text:** Up to 1,000 characters (500 for SYSA) can be inserted as the first paragraph of each of the categories.

**Confirmation Email:** Upon completing the survey, students will receive an automatic email. You can customize the contents of this email message.

## How do I allow students to see their reports?

Students can see their report as they complete the survey if you have selected “yes” in the survey setup. To do this:

1. Go Survey Settings
2. Select the Edit icon under the actions column
3. Change the toggle to “yes”

Student can view report

Yes 

No

If you select this feature, students will be able to view their Student Report upon completion of the survey without your counsel.

4. Select Next

## How do I update my grouping fields?

Your five grouping fields can be updated/populated in three different ways (these options can be combined to use multiple methods).

1. You can have them appear as a dropdown menu on the login page of the survey for students to respond to. In the survey setup wizard (Survey Setting à Edit Survey):
  - o Select the number of grouping fields you wish to use (maximum of 5)
  - o Select Next
  - o Check ‘show on survey’
  - o Update the “Display Name” by clicking on and typing in the field box.
  - o Add the new Survey response options in ‘Survey Response Options’
  - o Check to ‘include in survey’ in ‘Survey Response Options’
  - o Be sure to add an option of “Unknown, Other, or N/A” if needed.

Item	Field Name	Display Name (for this survey)	Show on Survey?	Assign Security	Configuration Action
1	Custom Grouping 1	<input type="text" value="Custom Grouping 1"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Survey Response Options</a>
2	Custom Grouping 2	<input type="text" value="Custom Grouping 2"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Survey Response Options</a>

2. You can upload the grouping assignment in a student file (either prior to administration, during your administration or after your administration) (yes- you can upload as many times as you need). See [Uploading Student Records](#) for more information.
3. You can manually update them on the STUDENTS tab using the check boxes or edit student tab.

Additional notes:

- these options can be combined to use multiple methods.
- no more than 5 grouping fields can be used (you might consider using custom questions)
- the ‘Assigned Security’ check box only needs selected if you have individuals that you want to login to the Retention Data Center, but should only see a subset of students. The subset of students must be indicated by a grouping field and the user will need a login. See the section titled ‘[I only want my advisors to see their advisees](#)’ for more information.
- if you update reports after they have previously been generated, you may need to reach out to [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) to have the report regenerated with the newly uploaded data.

## How do I modify the survey entry page instructions?

You can add text to the survey entry page. This text appears to the right of Student ID and email address.

Please enter the following information:

First Name:	<input type="text" value="Preview"/>	
Middle Initial:	<input type="text"/>	
Last Name:	<input type="text" value="Student"/>	
Student Identification Number:	<input type="text" value="A123456"/>	Please enter your 10 digit University ID.
Date of Birth:	<input type="text" value="Feb"/> <input type="text" value="5"/> <input type="text" value="2004"/>	
Gender:	<input type="text" value="Female"/>	
Student Status:	<input type="radio"/> International <input type="radio"/> Military/Veteran <input type="radio"/> International, Military/Veteran <input checked="" type="radio"/> Not Applicable	
Email Address:	<input type="text" value="preview@institution.edu"/>	Please enter your University email address (@ml.edu).
Phone Number:	<input type="text" value="1234567890"/>	

1. Go Survey Settings
2. Select the Edit icon under the actions column
3. Select Next until “Configure Survey Entry Instructions” is present
4. Add your text (select preview to see exactly how it appears)
5. Select Next

## How do I add custom questions?

You can add multiple choice questions in which a student would select one response. The questions appear at the end of the survey and appear on the Advisors/Counselor and Coordinator Report as well as the Custom Question Export.

Our suggestion is that you only use 5-10 custom questions to each of your surveys. You have a total of 100 questions for the entire life of your institutions Retention Data Center account (50 active, 50 inactive). Once used custom questions cannot be modified as it will affect historical data.

For sample custom questions, see the document found in our [Resource Library](#) documentation.

Adding custom questions to a survey is a two-part process:

1. Adding the questions to your account
2. Checking to include the specific questions in your survey setup.

## Adding custom questions to your account

1. Click Configuration (top right corner of the Retention Data Center)
2. Select Configure Custom Questions
  - The page displays questions already created and provides a button to add more. Responses to existing questions can be reviewed by hovering over the information button.
  - Questions that have been used previously in survey administrations become locked and cannot be edited; this maintains them for future use and reporting purposes. Once used, a new question must be created to make edit. If questions need removed from your master list, notify StudentSuccessTech@RuffaloNL.com
3. Add a question by clicking 'Create Custom Question'
4. Enter your question in the Question Text box provided. A question label is required and will not appear on the survey but will be used as the label in the export of student responses.

[Create Custom Question](#)

Custom Questions appear at the end of the standard items of a survey. A single response will be required for the student to complete the survey. As many questions and responses can be added as needed.

Question Text (As students will view on the survey)

Question Label (Represents the header row in exported data and filter list)

Answers (Add a row for each response from which students can select)

Item	Answer Text	Actions
•	<input style="width: 90%;" type="text"/>	

Add a row
Save
Cancel

5. Enter responses for your students to select from. Click Add a row as needed for the number of responses required.
6. Click SAVE and the question will become part of your master list.

Things to consider:

- Use the Edit or Delete buttons to make changes to new questions.
- Responding to custom questions is required; consider adding 'Don't know', 'Not sure', 'Unknown'

**IMPORTANT:** To include question(s) in your survey be sure to return to SURVEYS and Edit Survey to include new additions to your choice of custom questions.

### Adding Custom Questions to your survey

Once your custom questions are added to your account, you need to add them to your survey administration. To add the questions to your survey administration:

1. Go to the Survey Settings option within the Retention Data Center
2. Select Edit Survey in the dropdown menu found on the right.
3. Proceed to the page titled “Include Custom Questions” by selecting the Next button.
4. Select “Yes”, you want to include custom questions.
5. Select Next
6. Use the checkbox to select the questions you wish to include in this survey administration
7. Select Next

### Inactivating your historical custom questions

As previously noted, you can have a total of 100 questions in your account. Of those 100, only 50 can be active. If you inactive a question, it is not available for selection in your survey setup. To inactivate questions:

1. Go to the CONFIGURATIONS button in the upper right corner of the Retention Data Center
2. Select Configure Custom Question
3. Click on the ACTIVE/INACTIVE button found on the far right.
4. Select Update State

### How do I add campus-specific language to the Student Report

Adding campus-specific language to the student report allows your specific campus resources to be added to the student report.

1. Go Survey Settings
2. Select the Edit icon under the actions column
3. Select Next until it ask if you wish to add campus specific language

#### Add Campus-specific language to Student Report - *Demo 2024\_2*

This allows you to direct students to specific resources on your campus in the written interpretation section of the Student Report.

Do you wish to add campus-specific language for this survey administration?

- Yes  
 No

4. Select Yes
5. Type in the text you wish to appear on the reports.

### How do I modify the “confirmation email”

An automatic “confirmation email” is sent to students upon completing the survey. If you wish to modify this or add a link to their report, you can do so.

1. Go Survey Settings
2. Select the Edit icon under the actions column
3. Select Next until it asked if you wish to Configure the confirmation email
4. Select Yes

**Configure the confirmation email - Demo 2024\_2**

Do you want to customize the confirmation email sent to students when they complete the survey?

- Yes  
 No

5. Modify the standard message (note, the bracketed items are merge fields that will merge in the appropriate information when the email is sent)

If you wish to include a link to their results, make sure your survey setting is set to “yes” students can see their report (first page of survey setup wizard). An example email is:

*Thank you for taking the time to complete the [SurveyType] for [InstitutionName]. Your survey was complete on [SurveyCompletionDate].*

*The following link can be used to download your results:  
 [StudentResultsLink]*

6. Select Next

**How do I administer the survey?**

Once your survey is setup, you will have a standard survey link. You can distribute this links in a computer lab, as a classroom assignment, in orientation or via email invitation. You could even use the standard URL link to create a QR code for scanning as students walk into a captive environment (you would need to create the QR code using a QR code generator – RNL does not do this).

If you wish to send email invitation from the Retention Data Center to your students, you have that option as well. To do this, you will need to upload a student file prior to survey launch. For more information about any of these options, let us know.

You can also distribute the student’s Personal URL (PURL). Once you have uploaded a student data file, you can retrieve their personal URL links with the Export Data Function (Survey Link). This link can be emailed locally, posted on a portal, or provided via other methods.

**How do I get my survey URL?**

1. Login to the Retention Data Center
2. Select Survey Settings from menu on the left (if only icons appear, expand the menu)
3. Select the Information icon (Survey Summary) on the far right of your survey administration.

**Can I download my students’ Personal URL links?**

After a student file has been uploaded or students have entered the survey, you can download your student’s Personal URL links. To do this:

1. Login to the Retention Data Center
2. Select Export Data from the menu option
3. Confirm your “Survey View” is set to the correct set of students.
4. Select Add a New Template
5. Scroll through the list and move “Survey Link” from the left to the right.

6. Select Export
7. Select Export Now

## How do I upload a student file?

It is not required that you upload a student file unless sending email reminders from the Retention Data Center or to track those that have not completed the survey.

To upload a student file, create an excel file starting with our template.

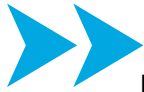
1. Copy and paste your data into our template (the template can be found within the Data Import section of your Retention Data Center account).
2. Confirm your header matches the template exactly.
3. Confirm all fields match the required format found below.
4. Save your file as Excel (if saving as CSV, ensure no fields have a comma)
5. Open your Retention Data Center account.
6. Upload within the Data Import of the Retention Data Center (note, the dropdown menu should say Student Access File).

File requirements are found below. Note, the columns noted with a red asterisk are required and the column must be populated. All other columns can be blank with just the header row present.

	Field	Max	Required Format
A *	Student ID	100	
B *	Email Address	60	
C *	DOB	10	MM/DD/YYYY
D	Gender	1	Single character only: M=Male; F=Female; O=Additional gender category or Other; T=Transgender; X=Choose not to disclose Q=Genderqueer; neither exclusively male nor female; U=Unknown
E	Grouping Field 1	50	Example: Major (example: Nursing)
F	Grouping Field 2	50	Example: Course Section (example: FYE101)
G	Grouping Field 3	50	Example: Advisor (Example: John Smith)
H	Grouping Field 4	50	Example: Resident Hall(example: Bender Hall)
I	Grouping Field 5	50	Example: Sport (example: Baseball)
J *	First Name	255	
K *	Last Name	255	
L	Student Status	255	<b>If populated, it must be one of the 3 following:</b> International - Military/Veteran - International Military/Veteran
M	Phone Number	14	RNL is not currently using phone number and <b>suggest to leave blank with just header.</b> Required formatting is (999) 999-9999 or 9999999999 or 999-999-9999
N	Academic Standing	50	<b>If populated, it must be one of the 3 following:</b> Good or Probation or Withdrawn

## Sample

Student ID	Email Address	DOB	Gender	Grouping Field	Grouping Field	Grouping Field	Grouping Field	Grouping Field	First Name	Last Name	Student Status	Phone Number	Academic Standing
123456	JS@RNL.com	01/01/2020	M	Nursing	FYE101	Smith	Bender	Baseball	John	Smith	International		Good



### What do I do with an upload error (Unsupported file type)?

If you receive an error when uploading your student file and the file did not successfully upload. Check the following items:

1. Are you using the template? Try pasting your data directly into this document and then upload.
2. Is the column format matching the notes in the “Student Access File Details”? If not, please update.
3. Do any of your columns have commas if you are saving on the CSV? If so, they will need to be removed.

If that doesn't resolve the issue, contact [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with a screenshot of your student file for reference.

If you receive an error when uploading your student file and some of your records were successfully loaded. If you open the file of errors, it will indicate why the records did not load. You may correct the errors and reload just those records (quicker) or your entire file. Whichever you prefer.

### Will my students be duplicated in the system?

The system will try to match a student record when uploading or if a student is completing the survey using the standard survey link. If it matches, the **student record will be updated**. If it doesn't match a new record will be created. To match, a record needs to match with one of the following:

- Last Name, DOB, Student ID
- DOB, StudentID
- FirstName, LastName, StudentID
- Email, StudentID
- Last name, DOB, Email
- DOB, Email,
- Lastname, FirstName, Email
- Lastname, Firstname, DOB

If you are uploading a student file, after upload, take a look at your total student count on your Dashboard. If the count doesn't match your upload, you know you have duplicate students. You can then manually go through and update the completed student record and delete the duplicate record.

### How do I email invitations to my survey recipients?

The e-mail communication tool allows you to send messages to individual students or to a group of students. All emailing is done under the Students section






**If you have not done so already, you need to allow RNL to send emails on your behalf. Next step is to email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with which of the two methods noted below that you wish to use:**

- A. Provide individual email addresses for those that will be sending emails for your campus (we can accommodate up to three different email addresses).  
OR
- B. Allow us to send emails from your entire email domain (@institution.edu). Once this is complete, anyone on your campus can send emails using the Retention Data Center. In order to start this process, provide us with your IT Department contact name and email address. We also suggest that you give the IT contact a heads up that we will be reaching out. Our IT team will then follow-up with the contact provided and complete the needed steps.
  - Note, some campuses won't allow us to verify their entire domain. If this is the case, you can still proceed with option A OR your team could create a subdomain (this would be work done by your IT team). The subdomain would then be verified (with our IT departments help) and then you would use this when sending email messages.

If you prefer (not our recommendation because students won't recognize the email address), you could send from our generic email address. The email address would be [studentsuccesstech@apps.ruffalonl.com](mailto:studentsuccesstech@apps.ruffalonl.com). You would simply plug in this email address when sending emails from the Retention Data Center.

Until one of these are complete, you will not be able to send emails from the Retention Data Center.

### E-mailing One Student

1. Select  under Actions and the student information page will appear.
2. Select the E-mail Student Tab.
3. Complete the following fields:
  - a. *From*: E-mail address of the sender.
  - b. *Subject*: Subject line of the e-mail.
  - c. *Body*: The content of your message.
4. Select Send

### E-mailing a Group of Students - NOW

1. Use the survey view and/or filtering options to select the group of students you want to e-mail (the check boxes do not work).
2. Select Email
3. Select "Send this e-mail now" and select **Next**.
4. Confirm the student count and select **Next**.
5. Complete the following fields:
  - a. *Template Name*: Select from the drop-down menu of predefined templates or create your own template by naming the e-mail message to save and use now and/or at a later date.

**When do you want to send this e-mail?**

- Schedule this e-mail to be sent at later date**
- Send this e-mail now**


- b. *From*: E-mail address of sender.
  - c. *Subject*: Subject line of e-mail.
  - d. *Body*: The content of your message. Within the body you can copy from the “List of Fields.” These placeholders will merge student-specific information into the content of your message. Select **Next**.
6. **Send Preview** for final review or **Send** the e-mail.

## E-mailing a Group of Students – SCHEDULE

1. Select
2. Select “Schedule this e-mail to be sent at a later date” and select **Next**.
3. Select the survey administration for the message and select **Next**.
4. Confirm your filter is set appropriately (if you only want the reminder/message sent to not complete students, be sure the filter ONLY includes Not Complete)
  - a. Note, if you are coming back through to modify your message, be sure to select ‘New Filter’. The system does not like when you select Previously Saved Filter.
5. Complete the following fields:
  - a. Start Date: Date you want e-mails to begin.
  - b. End Date: Date you want e-mails to end.
  - c. Select the day(s) of the week to be sent.
6. Complete e-mail fields
  - a. *Template Name*: Select from the drop-down menu of predefined templates or create your own template by naming the e-mail message to save and use now and/or at a later date.
  - b. *From*: E-mail address of sender.
  - c. *Subject*: Subject line of e-mail.
  - d. *Body*: The content of your message. Within the body you can copy from the “List of Fields.” These placeholders will merge student-specific information into the content of your message. Select **Next**.
7. Send Preview for final review or Save the scheduled message.

Please specify your schedule

Start Date  

End Date  

Days of the week to send e-mail

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Back

Next

Cancel

When do you want to send this e-mail?

Schedule this e-mail to be sent at later date

Send this e-mail now

Note, if you received an error, see step #4 (don’t use previously saved messages).

## How do I edit my scheduled emails?

The email tool only allows you to have one email scheduled. Therefore, if you go back through the email wizard any updates you make will override previously scheduled emails.

If you wish to cancel and email, go through the email tool and update the dates (to today), the email will no longer be sent as previously scheduled. The updates will overwrite the previously saved schedule.

## Do I have to send email messages?

No, you do not. Many campuses just use their survey URL and distribute it locally.

## Why am I receiving an error when updating an email?

If you are attempting to save a previously scheduled email but are receiving an error that looks like:

**ERROR: Object reference not set to an instance of an object.**

“Typically” this occurs when you select the ‘previously’ saved filter.

On this step, make sure the second one is checked.

### Send E-mails to Filtered Students

Please select

Previously Saved Student List

Student Count	Filter Name	Survey Name	Survey Status	Advanced Filter
13	Saved Filter	Fall 2020 CSI	Not Completed	Restricted Students Included

Student List

Student Count	Filter Name	Survey Name	Survey Status	Advanced Filter
384	---	Fall 2020 CSI	Completed	Restricted Students Included

## Can I restrict who sees students?

If you only want your advisors to see their advisees (this applies to any colleagues that you only want to have access to a subset of students and not all. You can “assign security”.

Step 1: Add the grouping responses ([discussed above](#))

Step 2: Create logins for each advisor ([discussed above](#))

Configurations – User Administration area of the Retention Data Center

Step 3: Tie the advisors login to their grouping response.

This is the step in which you tie the RNL logins to their designated grouping response.



1. Go to Survey Settings in the Retention Data Center
2. Select the paper and pencil icon on the right (edit survey)
3. Select Next Three times.
4. If it is not already checked, make sure “Assigned Security” is checked for the grouping field with the designated grouping responses.
5. Select Next
6. Open the group field name by clicking the triangle/grouping field name.
7. Select the icon in the action column.
8. Check the appropriate individuals to have access to that grouping response.

## How do I 'start' my survey?

Once your survey is setup and customized as you wish, you are set to launch. To launch the survey, distribute your survey URL (either locally or via emails from the Retention Data Center).

## Can I preview my survey?

Yes, you may use the preview survey options by:

1. Go to Survey Settings
2. Select the information icon (Survey Summary) within the action column on the right.
3. Select the Preview Survey button.

## Post Survey Administration

### Can a student finish a survey they previously started?

If a student started the survey but has not finished (because they purposely left or because of some type of error), they should be able to log back in and complete the survey. They can login using:

1. The original survey link – if they do this, they will be asked to enter their login information but once completed, they should pick up where they left off.
2. Their personal URL link – you can send them an email using the 'action' item on the far right of their name on the STUDENTS button of the Retention Data Center. If you include the merge field of [StudentSurveyLink] their personal URL link will be merged in when the student receives the email.

### My student indicates their link isn't working, what can we do?

If you have a student indicating the survey link they received isn't working:

1. Confirm yourself if the link is working (when you click on it, does it open up the survey)
  - a. If the link is working, suggest the student copy and paste the link instead of clicking on it. There could be something happening with the hyperlink.
  - b. If the link isn't working, confirm they have the correct link. You can find the standard survey URL and personal URL links within the Retention Data Center.

If the suggested items do not resolve the issue, email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with as much information (and screenshots) as possible.

If the student is indicating they can't proceed past the login page of the survey, have them confirm all fields are completed. If one is missing, they will not be able to proceed.

### My students have completed the survey, what do I do now?

Once your students have completed the survey, you can login to the Retention Data Center and pull reports, export data, pull summary reports, do your analysis, share your results with others on campus and start your student conversations.

Note, you can pull reports at any time. Not all students need to be completed to begin pulling reports.

Additional resources for “[reviewing your results](#)” and “[sharing your results](#)” can be found on the web. Select Resource Library within the Retention Data Center to find these.

## How do I download individual students reports?

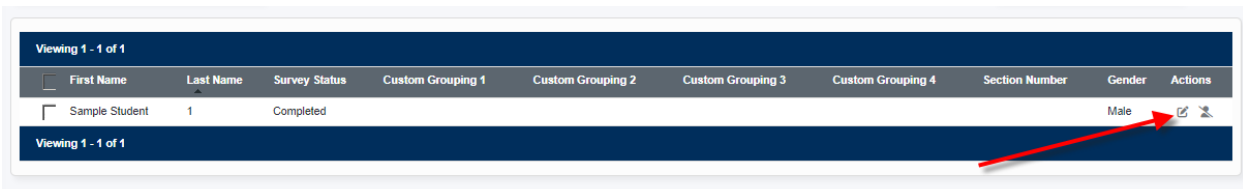
You will be able to view, print, or save individual reports or sets of reports as students complete the survey. Summary results and exportable data will also be available. Including, filtered sets of students for report retrieval, summary reports or outreach.


When it comes to downloading reports, consider the following:


- *Will you be printing reports?* If you are doing bulk report generation (see instructions), the student report is three pages and does not print well front to back. However, the advisor report is a single page (not including the written interpretation). If you feel the need to print the student reports and want to do so in bulk, you might consider running a custom JavaScript query to add blank pages within your Student Report PDF file.
- *Could you distribute the personal URL links for access to reports* (to advisor/success coaches/students)? You can change the toggle option to “Yes” students can see their report within the survey configuration. Once this is completed, the personal URL link grants access to reports. The personal URL links can be downloaded from the Export Data section of the Retention Data Center.
- *Do you need to organize reports by a specific field?* As an example, use one of your grouping fields to identify and pull reports for each advisor (one large PDF file with all their students).
- *Do you have a campus system you would like the reports to appear in?* Send a request for our team to setup a SFTP site with the individual reports (they are individual PDF files named with the student ID). You could then login and download the reports from there (note, the setup would likely take a couple of weeks to complete). These reports could be posted in a campus system or simply placed in a file for easy advisor access.

### For one individual student:

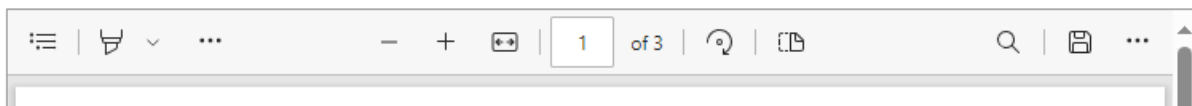
1. Filter to your completed students on the Dashboard, by clicking on the completed count of students (the number) found under Survey Selection
2. Select the Information icon, on the far right, within the action column



First Name	Last Name	Survey Status	Custom Grouping 1	Custom Grouping 2	Custom Grouping 3	Custom Grouping 4	Section Number	Gender	Actions
Sample Student	1	Completed						Male	

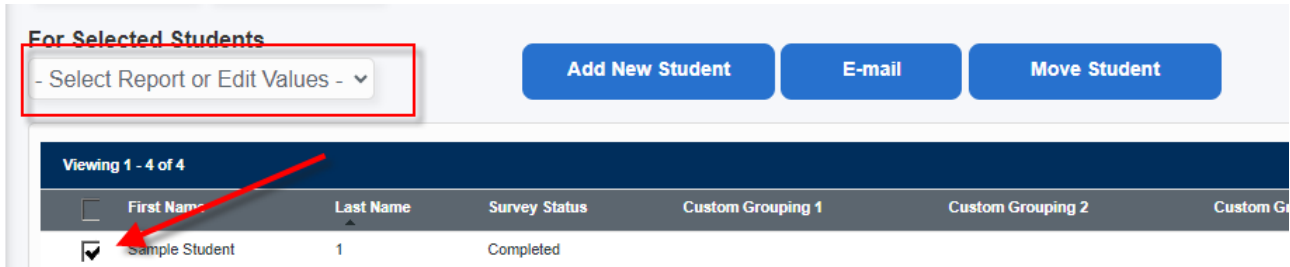
Note:  Actions provides tabulated windows to review individual student reports, log meeting/discussion notes you have had with your student or send an e-mail message.

[Student Report](#)   [Advisor/Counselor Report](#)   [Coordinator Report](#)   [Advise Student](#)   [Edit Profile](#)   [E-mail Student](#)



### For multiple or all students:

1. On the Dashboard, click on the completed count of students (the number) found under Survey Selection
2. Select the check boxes to the left of each student
3. Use the dropdown menu above (-Select Report or Edit Values -) to select the desired report



The reports will open in Adobe reader. You can print or save the reports for easy access.

### Items to consider:

- You can filter to a subset of students and then pull reports in a batch if you wish. See “[Filtering Student Records](#)” for more information.
- The search area allows you to find a student by first name, last name, student Id, or e-mail address.
- If student records are not appearing as expected:
  - a) They may not be assigned to you. See your program coordinator for next steps.
  - b) The student has restricted access to the program coordinator per his/her response to the last standard item of the survey. This is indicated by a red box or a padlock. See your program coordinator for next steps.
  - c) Confirm that your filter is set to include the students you are looking for.

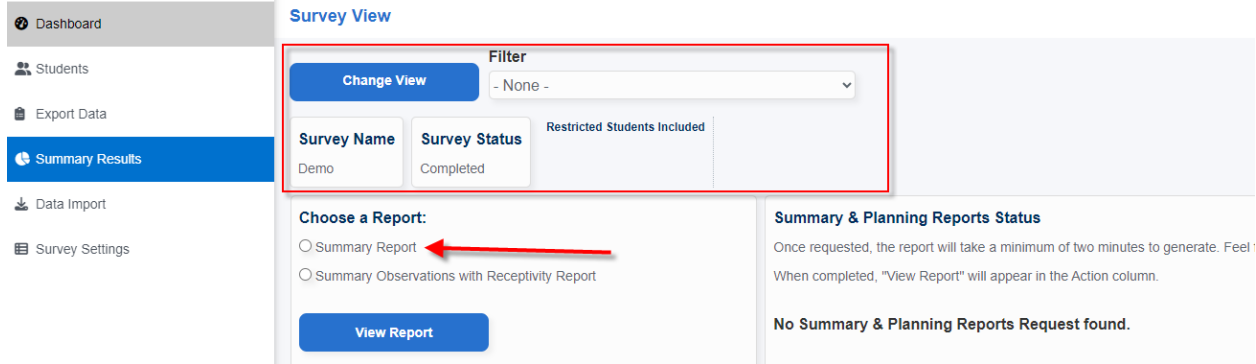
### How do I download my summary reports?

The **Summary and Planning Report** includes the means of all students who completed the CSI, presented in three statistical summaries. The first is for females only, the second for males only, and the third for the total sample. All means are computed from percentile scores. Since these scores are based on national norms, the means provide a useful indication of how your students’ overall motivational patterns compare with that of a national sample. The Summary and Planning Report will open in your current version of Adobe Acrobat. From the Adobe Acrobat toolbar, you may print and/or save the report.

The **Summary Observations with Receptivity Report** provides a snapshot of students across the summary scales—dropout proneness, predicted academic difficulty, educational stress, and receptivity to institutional help—and the individual receptivity scales—academic assistance, personal counseling, social enrichment, and financial guidance. The Summary Observations with Receptivity Report open in HTML on your screen. Use the Filter options within the report to save information locally.

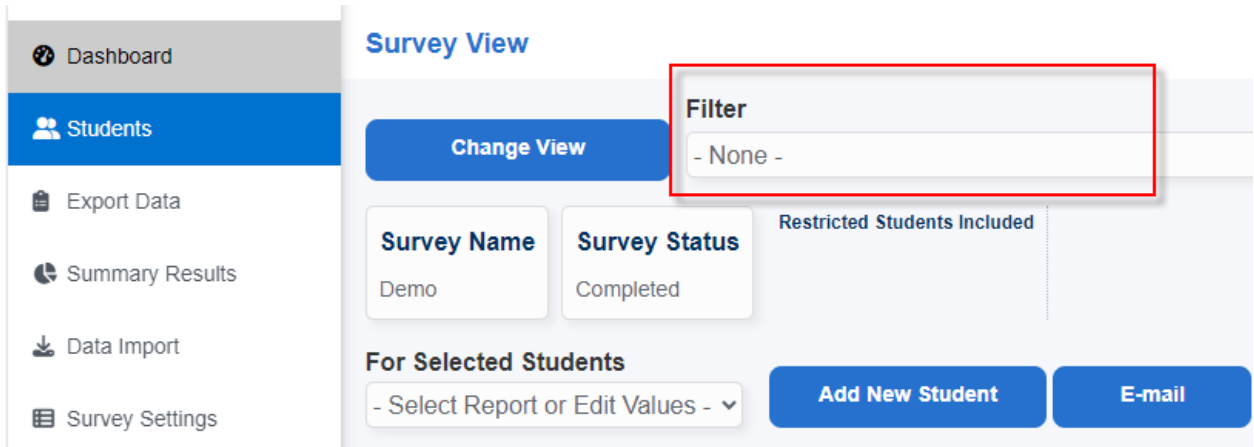
1. Start with steps 1-3 noted on “Getting Started”
2. Select Summary Results (on the left)

3. Confirm your “Survey View” is set appropriately
  - a. you can filter to a subset of students and then pull a summary report on a subset of students. See “[Filtering Student Records](#)” for more information.
  - b. To view multiple survey administrations at one time, use the Change View button to make your selections.
4. Select the report you wish to view
5. Select View Report
  - a. Note, the Summary Report takes several minutes to process and will display “View Report” when ready. If your report takes longer than 15 minutes, please notify StudentSuccessTech@RuffaloNL.com



### How can I filter my student records?

Filtering students allows you to view groups of students with specific criteria you identify. Create a new filter, use an existing filter, or clear an applied filter at the drop-down menu provided.



### Creating a New Filter

1. Select - New Filter – from the Filter Dropdown Menu (found on the Students, Export Data, or Summary Results section)

2. Select the field(s) for the filter using the drop-down menus. Combinations of data fields may be applied by using multiple drop downs.

**Note – if the dropdown menus do not appear**, click [Select/Change Fields](#)

3. Select Save

**Filter Students**

Please set/change the fields used for filtering by changing the values below

-- None --    -- None --

-- None --    -- None --

-- None --

**Save**    **Cancel**

Selected fields will present a range selection. Where multiple fields are selected a student record must fall into the range of all selections to appear on the list.

4. Enter or select the range.
5. Enter a name in the *Save the Filter* to save for future use (optional).
6. Select apply filter.

**Turn off a filter** by selecting **Clear Filter** from the drop-down menu.

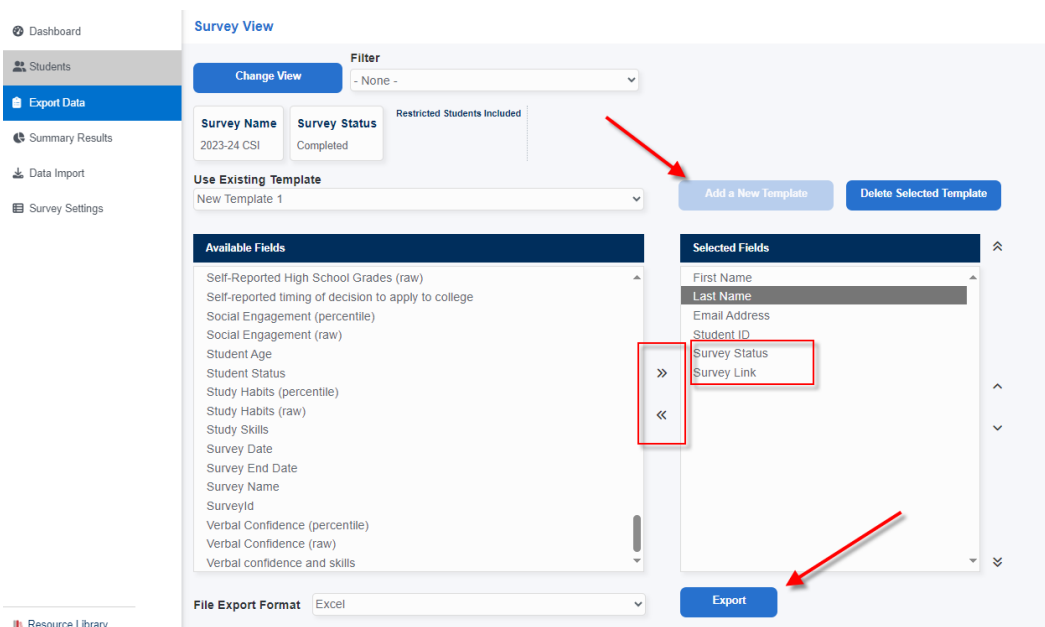
**Delete a saved filter:** Select **MyFilters** in the upper right-hand corner of the data center.



## How can I export my student data?

Generate an exportable file with data fields from the assessment results. Use existing templates or create your own combination.

1. Start with steps 1-3 noted on “Getting Started”
2. Select Export Data (on the left)
3. Confirm your “Survey View” is set appropriately
4. Select the preferred export. You can select from:
  - a. **Raw Survey Export:** Raw data are the numbered self-reported responses of each student.
  - b. **Translated Survey Export:** Translated data are the scales calculated from student responses (the data you see on the reports)
  - c. **Custom Question Export:** Export the question and responses to any custom questions. Includes numbered response and text of response.
  - d. **Partner Export:** Export a file that can easily be imported into databases.
  - e. **Advisor Notes:** Export each student and the advising notes associated to the student record.
  - f. **Combined Mid-Year Raw Export** (if applicable): contains both the CSI and MYSA raw data (raw responses to each question).
  - g. **Combined Mid-Year Translated Export** (if applicable): contains both the CSI and MYSA translated data (scale scores).
  - h. **Create your own file** (by selecting add a new Template): allows for creating a file with selected data fields.
    - i. Select and move fields by using the arrow buttons from Available fields to Selected Fields. Move fields up and down by using the arrows.



- i. **Previously saved personal filters:** you can save filters you create (using add a new template). This allows you to export the same data template in the future. Note, you cannot modify a previously saved export. A new filter will need created.
5. Select a file format of choice (Excel, CSV, etc.)
6. Select Export

## Can we input our data into our Learning Management System (LMS)?

This includes Starfish/Hobsons Retain/Noro...

Yes, you can. You have two options for this:

1. The PDF copies of the advisor reports – this would require you to manually login to a secure FTP site that we have created for you where your reports would be posted by StudentID.
2. Exporting and Importing data – using the ‘partner export’ template found in the Retention Data Center, you can export the standard data and import into your LMS system.
  - a. Note, if you have a ‘homegrown’ LMS system, you will need to create the function to import the data and you can export whatever data you would like.

To request a secure FTP site, email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) indicating which report you would like post (student report, advisor/counselor report or coordinator report).

Note, prior to uploading, you will want to remove any students that have indicated their reports are ‘restricted’.

If a client has used the SFTP site in the past, new reports should automatically be posted there.

Additional information found in: Starfish Retention Solutions Integration at the Resource Library button of the Retention Data Center.

## What resources do have for Advisors?

We have several resources for your advisors. This includes the Advisors Guide as well as all the documents found at: [Reviewing Results with Students](#)

This includes, but is not limited to:

- a. Report Retrieval instructions for pulling reports from the Retention Data Center
- b. Overview Documents
- c. Conversation Starters
- d. Worksheets and Assignments
- e. Referral Form
- f. Student Contract for Next Steps
- g. Emailing Students (from the Retention Data Center)

## Are trainings available?

Yes, we do offer trainings. We offer trainings for using the Retention Data Center as well as trainings on using your data.

For more information regarding the data trainings, [contact us](#) with a basic message about what questions you have.

## Do you have best practices on using the data?

Yes, we do. We have several webpages to help you out with this. Specifically, the following pages might be helpful in this process:

- [Reviewing Results with Students](#)
- [Sharing RMS Results on Your Campus](#)

### Can a student retake the survey?

Yes, a student can have their survey reset. Email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with the student's first name, last name, email address and student ID requesting they retake the survey.

The only other way for a student to retake the assessment (without being reset), is for the student to enter enough of their information incorrectly on the login page of the survey. Because if they enter the same information, the system will recognize they already exist and not allow them to take it again.

### Can a student be “unrestricted”?

If a student has given consent to un-restrict their report, email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with the student's first name, last name, email address and student ID. RNL admin can update this record.

### How can I delete a completed student record?

Yes, with your confirmation, RNL admin can make the update. Email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) with the student's first name, last name, email address and student ID. RNL admin can update this record.

### Can a student get their results after completing the survey?

Yes, a student can retrieve their reports assuming in the survey Wizard, the question asking if students are allowed to see their results is noted as “yes”.

Student can view report

Yes

No

If you select this feature, students will be able to view their Student Report upon completion of the survey without your counsel.

Assuming this is the case:

If the student has already completed the survey and clicks on their personal URL, they can click on a button that indicates “view student report”.


If they have already completed the survey and then click on the general URL, they will be asked to enter their login information. Assuming ENOUGH of the information entered on this screen matches their completed record, once they hit ‘take survey’ they will be prompted to have a copy of their results sent to the original email used when taking the survey.

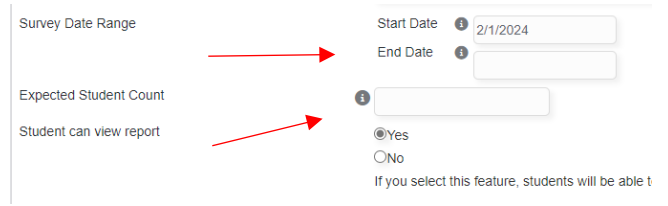
### Can I email students their results?

The email communication tool allows you to send students a link in which they can access their results (there is no direct attachment to the email).

In order for students to receive their Student Report the survey status must be **ACTIVE** and set to **YES** to allow students to view their results.

**Step 1: Confirm that your survey is still open, and student can view their report.**

1. Select Survey Settings
2. Select the  icon under the Action column.
3. Make sure the End date is appropriately adjusted for your students to have adequate time to download their results.
4. Confirm survey setting ‘Student Can View Report’ is set to **Yes**.




Note: moving forward, any student that completes the survey with this link will immediately see their results.

5. Select Next (with one click of the Next button your changes are saved).  
You are now ready to e-mail your students.

**Step 2: Emailing a Group of Students**

From Dashboard select the COMPLETED students, or at STUDENTS use the blue CHANGE button and/or filter options to identify your group of students.

Note: The student count identified in the gray toolbar will be the group receiving the email. Once identified:

1. From STUDENTS, select 
2. Click “Send this e-mail now”, click Next.
3. Confirm the filter and student count, click Next.
4. Complete the following fields:

**Send E-mails to Filtered Students**

When do you want to send this e-mail?

- Schedule this e-mail to be sent at later date
- Send this e-mail now

*Template Name:* Select from the drop-down menu of pre-defined templates or create your own template.

*From:* [StudentSuccessTech@apps.ruffalonl.com](mailto:StudentSuccessTech@apps.ruffalonl.com)

*Subject:* Subject line of email (example: Your CSI Results Are In!)

*Body:* The content of your message. Within the body copy from the “List of Fields.” These placeholders merge student-specific information into the content of your message. Make sure your message includes [StudentSurveyLink] exactly as presented here as the merge field that will present the personal URL for students to access their results. An example:

Your CSI Results Are In!!!  
Please review the results of your College Student Inventory.  
You may access your results using the following link: [StudentSurveyLink]

5. Send Preview for final review. (Click Back if updates are needed, or...)
6. Send Email.

**Can I pull a summary report of only a subset of my students?**

Yes, but you must be able to filter to that subset of students using either: Grouping field responses, custom questions, demographic responses, or report outcomes. If you wish to use one of your grouping fields that isn’t already present, you must add them by:

1. Adding the response options to your survey setup (be sure to check and include them in the survey) and then manually re-assign the students.
2. Upload a student file with the new grouping fields assigned.

The student must be assigned the grouping field in order to filter to them.

### **How do I access old data?**

RNL's policy is to keep only current data within our databases. The RMS suite will keep your current data plus the last 5 years. If you are looking for data within this time period, but do not see the survey administration on your Dashboard, you can access the data by:

1. Go to the STUDENTS button of the Retention Data Center
2. Select the Change View button
3. Select the appropriate survey type and scroll through the "surveys" listing to select the survey(s) you wish to view.
4. Select Save.

At this point, you can generate reports and/or export data for these survey administrations.

### **Where can I find a hard copy of the survey to print?**

Email [StudentSuccessTech@RuffaloNL.com](mailto:StudentSuccessTech@RuffaloNL.com) for a hard copy of the survey.

### **How can I schedule time to chat with the RNL team?**

Feel free to [contact our team](#) with a basic message about what you are looking for. We are happy to schedule a time to chat or answer any questions you might have.