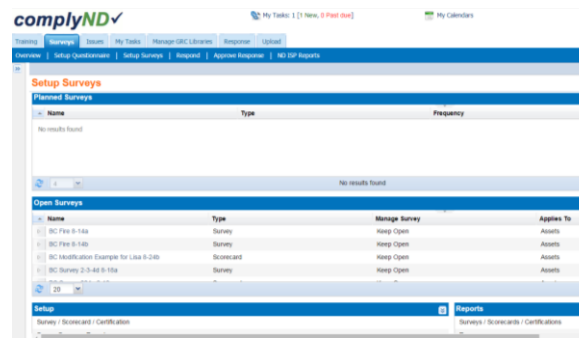


complyND[✓] – Set-up and Assign OISP Survey

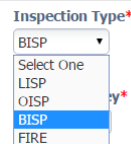
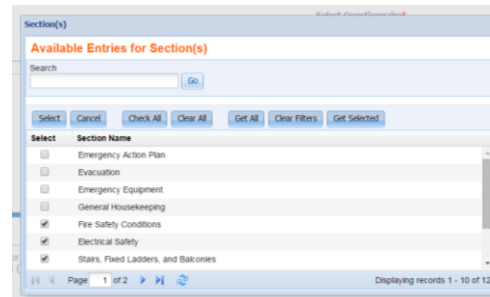
As an inspection admin, you will be able to setup and assign an OISP survey in complyND. Please refer to the [complyND[✓] Inspection Management User Guide](#) for more detailed information.

Set-up and Assign OISP Survey

1. Log into **complyND**.
2. From the Survey tab, click **Setup surveys**.
3. From the *Setup* infoport, select **Survey/Scorecard/Certification**.



4. Select **Type** (survey, scorecard or certification)
5. Select **Questionnaire**. All questionnaire loaded in the system are available in this popup window.
6. In the **Name** field the questionnaire name automatically fills in. However, since every survey must have a unique name you will need to modify this name.
7. **Choose section(s)**. You can choose one or more sections from the selected questionnaire. This will not normally be necessary.
8. Choose **Primary Contact** (person who will be the issue contact).
9. In the **Inspection Type** field, choose **OISP**.
10. In the **Applies To** field **Organization** is auto filled based on the fact that an OISP questionnaire was selected
11. **Generate Excel Based Response** (check or not?).



12. In the **Manage Survey** dropdown field select **Keep open** in order to keep the survey open until all issues have been resolved.

The screenshot shows a form titled "Survey: OISP Office of Information Technologies 2015 Inspection". It includes several fields: "Type" (Survey), "Name" (OISP Office of Information Technologies 2015 Inspection), "Primary Contact" (Donna Thompson), "Applies To" (Organizations), "Select Questionnaire" (OISP Conditional Test 8-24 Randy), "Section(s)" (Administrative Data, General Requirements and Documentation, Emergency), "Inspection Type" (OISP), and "Manage Survey" (Keep Open). There is also a "Generate Excel Based Response" checkbox.

13. On the **Details** tab the option **Select From a Filtered List (Better for Large Surveys & Certifications)** is selected by default. Change it to **Select One or More Individual Items (Better for Smaller Surveys & Certifications)**

14. In *Select Individual Items*, use the filters to search for the specific organization.

The screenshot shows the "Details" tab with two radio button options: "Select From a Filtered List (Better for Large Surveys & Certifications)" and "Select One or More Individual Items (Better for Smaller Surveys & Certifications)". Below this is a "Select Individual Items" section with a table. The table has columns for "Add", "Delete Last", and "Total Rows". The "Organization" column contains "VP and Chief Information Officer". The table shows "Pages: 1 of 1" and "Total Rows: 1".

15. In *Send To*, select **User** (user and role are the options) in the **Send To** dropdown field.

16. Select the **Assessor Organizations(s)** and **Send to Assessor(s)**. These fields are searchable.

17. Leave the **Approval based on response(s)** unchecked.

18. **Send to (For Approval)** is not a required field.

19. In the **Approval Required from All Users** field, normally you will select **No**.

20. In the **Collaborative Response** field, normally you will select **No**.

The screenshot shows the "SendTo" form with several fields: "Send To" (User), "Assessor Organization(s)" (VP and Chief Information Officer_2900_Unit), "Send To Assessor(s)" (Donna Thompson), "Approval Based on Response(s)" (unchecked), "Send To (For Approval)" (No), "Approval Required from All Users" (No), and "Collaborative Response" (No).

21. In *Overall Response Approver*, select the **Overall Approver Organization** and the **Overall Approver**.

Survey: OISP Office of Information Technologies 2015 Inspection

Overall Response Approver

Overall Approver Organization*
Associate VP for Campus Safety_NHS_Department

Overall Approver*
Jon Crist

Scheduling

Frequency*
Run Now

Start Date
08/23/2015 EDT

Close Date*
08/23/2016 EDT

Due After (Calendar Days)*
15

23. In *General*, in the **Inspections and Guidelines** field, use Word text box to add any instructions for the inspection.

24. In the **Findings Can Be Added By** field, if you are both the Assessor and the Approver, select both **Approver** and **Respondent**. Otherwise, just select Approver.

General

Instructions/Guidelines

The inspection of Grace Hall must be completed in the next 2 weeks.

Findings Can Be Added By

Available Entries for Findings Can Be Added By

| Select | Findings Can Be Added By |
|-------------------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Approver |
| <input checked="" type="checkbox"/> | Respondent |

25. **Auto-create findings for overdue responses ?**

26. If you want to send reminder email, click on the **Reminders Tab**.

27. In **Reminder Type** you can choose from **Send before due date**, **Send on due date**, **Send after due date**, or **Send now**.

28. In **Send to** choose from **All incomplete responses** or **All respondents**.

29. The **Number of Days** option applies to the number of days before or after the due date when you want the email sent.

30. You can send a copy of the email to another role or user, but neither **Cc for (user or role)** nor **Cc** is a required field.

31. Both **Subject** and **Reminder text** are required fields.

Survey: OISP Office of Information Technologies 2015 Inspection

Organizations

Keep Open

Details Reminders

Reminder Type
Send Before Due Date

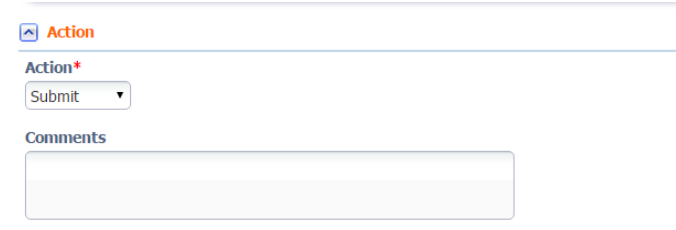

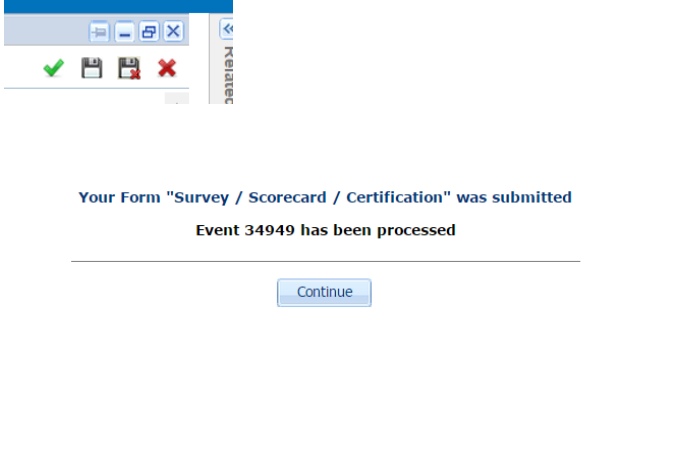
Send To*
All Incomplete Responses

Number Of Days*
7

CC For
Select One

Subject*
Survey due soon

Reminder Text*
A survey assigned to you is due soon.

| | |
|--|--|
| <p>32. Once you have completed both the <i>Details</i> and the <i>Reminders</i>, you are ready to submit the survey. In Actions, choose Submit.</p> <p>33. Any comment you enter in Comments will become part of the survey's comment history. This is not a required field.</p> |  |
| <p>34. Click the green checkmark  to submit the survey.</p> <p>35. A popup window will open to tell you that your survey has been accepted. Click Continue to accept the message.</p> <p><i>NOTE: See Chapter 4, Inspection Management Solution, in the complyND Inspection Management User Guide for more detailed information.</i></p> |  |

Notes Section, if applicable