REACH Boarding

The future of boarding is within REACH.

User Guide

LISTS MANAGER

Contents

33 Lists Manager

The REACH Lists Manager module allows you to collect an unlimited number of lists from your system users. Lists are like forms, with questions that are answered by your audience and with answers that can be used to influence how your REACH portal operates.

The Lists module is very versatile and can be used to create sign up lists, booking forms, confirmation submissions, survey forms, afternoon activity lists, transport bookings, etc. Your lists and forms can be shared with students, parents and staff for completion as an efficient way for you to collect relevant information for your operations.

Examples of some list types are

- Afternoon activities registration
- School transport booking list
- Schedule an early wake up call
- Meal time intention (meal required/not required)
- Covid-19 daily health survey

Lists Components

The structure of the Lists module is made up of three (3) sections

Question Management

You can create questions on a per list basis or you can save Question templates to a Question Bank in the Question Management section.

Questions in the Question Bank can be used in multiple lists and saves you from having to create replica questions across multiple Lists if you are seeking common data.

Question Management is covered in section 33.1 of this guide.

List Designer

The List Designer is where you build and configure a list or form that you want to use. In this section you will set the questions to be used in the list and the mechanics of the List such as who the audience is, how often they will see the list, etc

List Designer details is covered in section 33.2 of this guide.

List Management

List Management is your live lists dashboard where all of the data for list that you have published and are being populated by your audience is being displayed. Here you can see the results of your current or historic lists and export that data for use in external systems.

Definitions

Audience	The list of participants for your list. Who is able to see the list and complete or submit the list questions.
Available Answers	Drop down select questions require a set of available answers that can be selected in the drop down select option.
Booleen	A Yes or No type question
Drop down	A type of question where users can select from a range of options for their answer. Drop downs may be single select or multi select.
Hidden Question	Questions that are not displayed to the audience. May be lookup fields that compliment your data table or questions that require staff to answer when managing the list results.
Lookup	An existing field in REACH. You can use Lookups as a question type so that you get REACH relevant information or selections in your lists
Question	Questions are the content for lists. Mostly these are questions that you will be seeking a reply from the audience
Question Bank	The question bank is a collection of question templates that you can use in any list. These questions appear on your Question Management table and can be selected when using the List Designer for use in any list.
Question template	A question template is a preconfigured question that you can use in any list. These are created in your Question management screen and are saved to your Question bank. You can edit question templates from your Question Management table.
Response Table	The display of your list responses in the List Management view

Extension Module

Lists Manage is a REACH Extension Module. The module is available in your REACH portal for free however free use is limited to using 5 active lists.

You can upgrade the module for unlimited usage for $99 per annum.

33.1 Question Management

You can manage questions in two ways in the Lists module.

1. You can create questions for each list individually in the Lists Designer section. You do not need to use the Question Management section when creating questions in the list itself.

2. You can build a set of Question Templates which can be selected and used in multiple lists. Question Templates must be created in the Question Management section and saved to your Question Bank.

The structure and design of each question is the same regardless of whether it is a Question Template of a list specific question. The only difference in these questions is whether the question is available for use in more than one list.

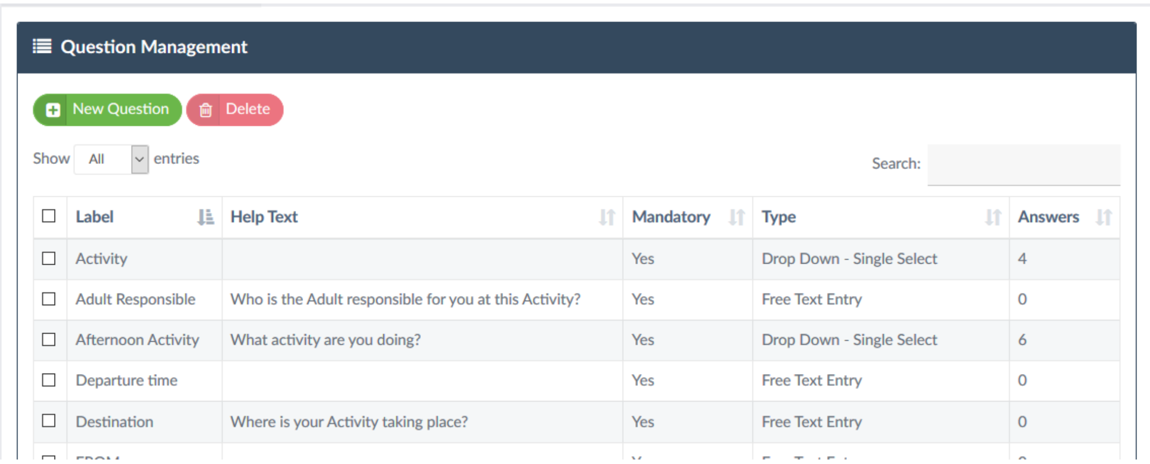
The procedure for creating a question is the same whether you are creating the question for a single list or saving to the Question Bank.

Question Templates

Question templates are questions that you can re-use in as many lists as you want. It is not uncommon for some questions to be similar across lists so using a Question Template for these types of questions means that you only have to set the question structure up once and you can then select it for use in any Lists that you design.

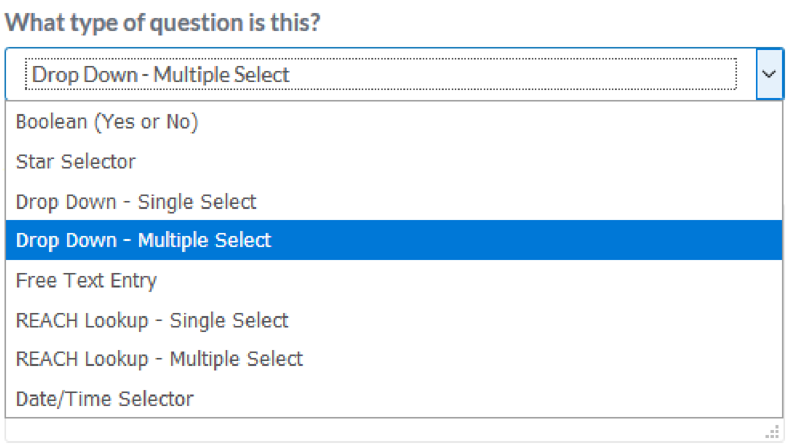
33.1.1 Question Management Table

Your question bank is the table of Question Templates that are available for use in any of your lists. Questions that are created as templates are available for viewing and editing in your Question management Table.



33.1.2 Question Types

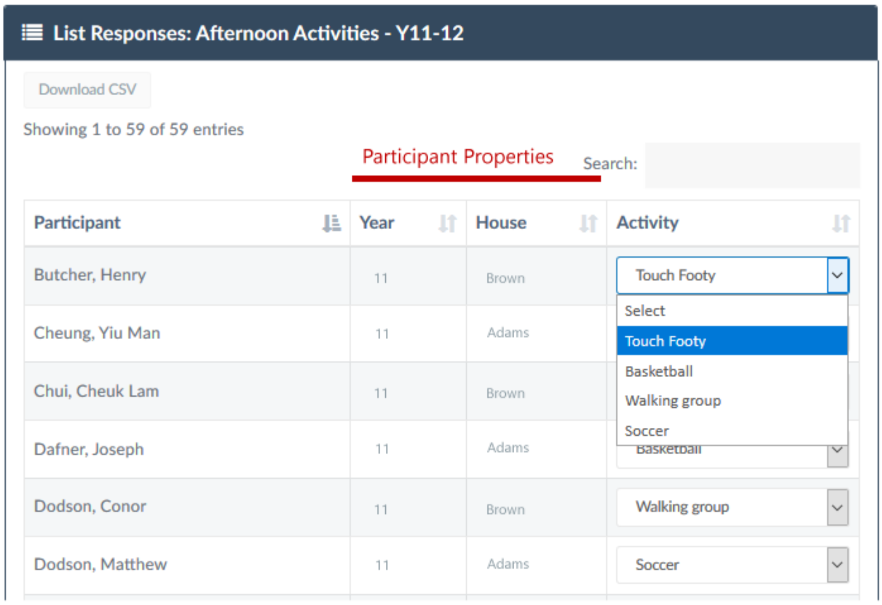
There are a number of question types that you can select from when creating questions to use in your lists. Each type of question allows you to gather different types of information.



Question Type	Description
Yes/No (Boolean)	A Boolean question is a simple question that allows for a YES or NO answer.
Date/Time Selector	Allows you to collect Date and Time information as the from your users. When selected as your question type you can then set whether the answer for your question should collect Date Only, Time only or Date and Time details.
Free Text Entry	Allows the user to add a text answer to your question. Text answers can be alpha-numeric.
Drop Down Select (single or multi)	Drop Down Select questions provide for a list of options that the user can select from as their answer to your question. You can create single select or multi select questions. Single select allows only item to be selected. Multi-select allows for multiple items from the drop down list to be selected. When using the Drop Down question type you are required to add the list of potential answers that are available for the user to select.
REACH Lookup (single or multi)	REACH Lookup allows you to add a REACH field to your list. You can use this type of question to collect information from users by making it visible to the user in your list or to simply add relevant information about a user to your list output by making the Lookup field not visible to the user and only visible to staff when managing or viewing the data collected by the list. When offered as a selection for the user you can make the question a single select or multi select option.
Participant Property	A Participant Property is part of the REACH Lookup question type which can provide pre-filled content of existing REACH data for the participant. These are most often not displayed to the audience and only visible in the List Management view.

Using Participant Properties as questions

Participant properties not really a question. They are prefilled fields for each audience member (eg: year or house of a student). They can be added to your list so that relevant information can be included in your list output results table to make it easier to use the data that is captured by your list.



Participant properties are usually not shown to the audience and are added to you list only to ensure the important info you need in your output data is visible to you.

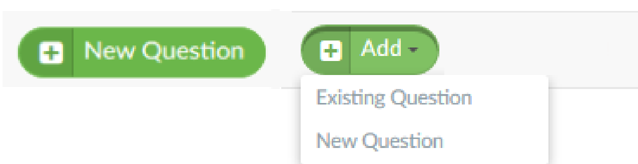
33.1.3 Creating Questions

Questions can be created from either the Question Management section or in the List Designer section of the Lists module.

Questions that you will only use in one list are single use questions and you can create these questions directly in the List Designer section.

If you want to create a question that can be used in multiple lists then you <u>must</u> create a Question Template in the Question Management table so that your question is saved to the question bank as a Question Template.

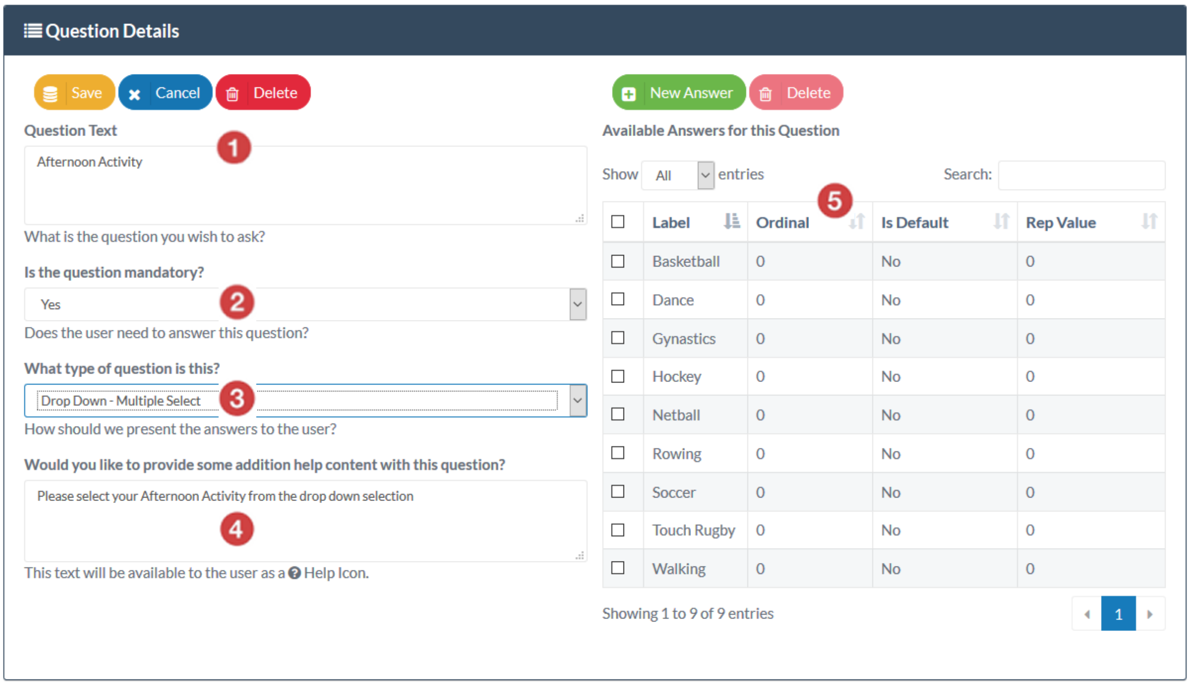
- Clicking on the New Question button in the Question Management table will open the Question Details screen.
- Clicking on the Add button in the Question Actions section of the List Designer will give you the option of selecting an existing question or to create a new question for use in that list only.



Question Details screen

Depending on which screen you are accessing from, the New Question or Add > New Question buttons will open the Question Details screen where you can design your question type, rules and available answers (for drop down select questions).

There are five (5) settings that you need to specify for each question.



	Question Description
1	Question Text Is the label for the question. It is what will appear to the user as the title of the question.
2	Mandatory (Y/N) Determines whether your question mandatory for your users to answer? This is a Yes/No setting.
3	Question Type Select the type of answer are you seeking for your question? There are multiple types of questions that you can select in order to collect the details that you require.
4	Additional Content Can be used to provide an explanation for the user on the purpose of the question or the details that you are attempting to obtain from them.
5	Available Answers Drop down select question types will have preset answers to select from. Available answers is the list of possible answers for your question that your users can select from.

Setting Available Answers for Drop Down Select questions

When using drop down select questions you need to present a range of options for the audience to select from. There are set as Available Answers in your question.

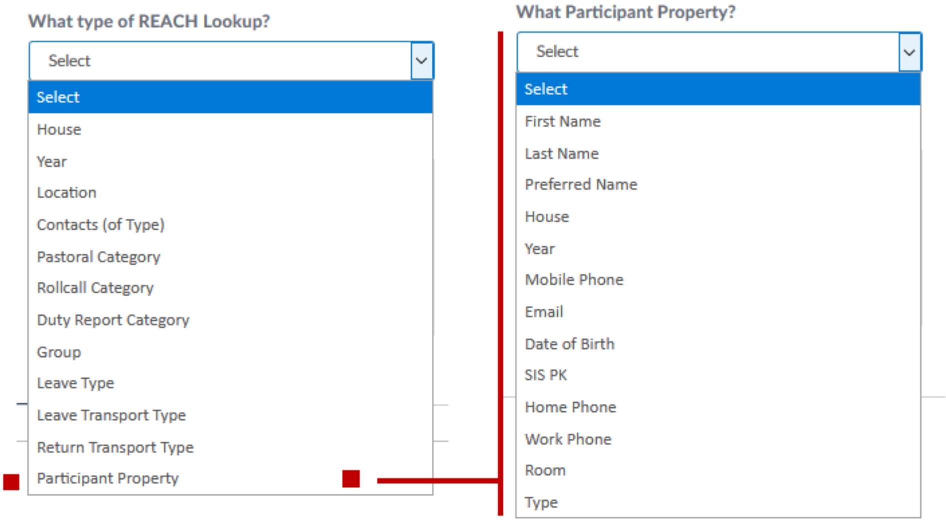
- You can set as many available answers as you wish for a drop down select question
- REACH will display these alphabetically in the drop down selector unless you set an ordinal (sequence) that you want them to display.
- Set the Representative value to zero. This field is not yet in operation but will, in the future, allow you to build scores based on audience responses.

Using Lookups in your Questions

Your questions have the ability to include existing REACH data fields (ie: REACH Lookups) as part of the question set. These can be used as a selection option in drop down fields or they may also pre-populate the data field with a participant's system details so that you can include this data in your lists output table.

The following REACH Lookups can be used in your Lists.

*** Where Participant Property is used as a Lookup then you also need to select which Participant Property you would like to use.*



33.2 List Designer

The List Designer is where you design and configure lists. The List Designer table provides a view of all of your current lists and their visibility setting. Here you can click to edit any existing lists or create new lists by selecting the New List button.

How do design a list

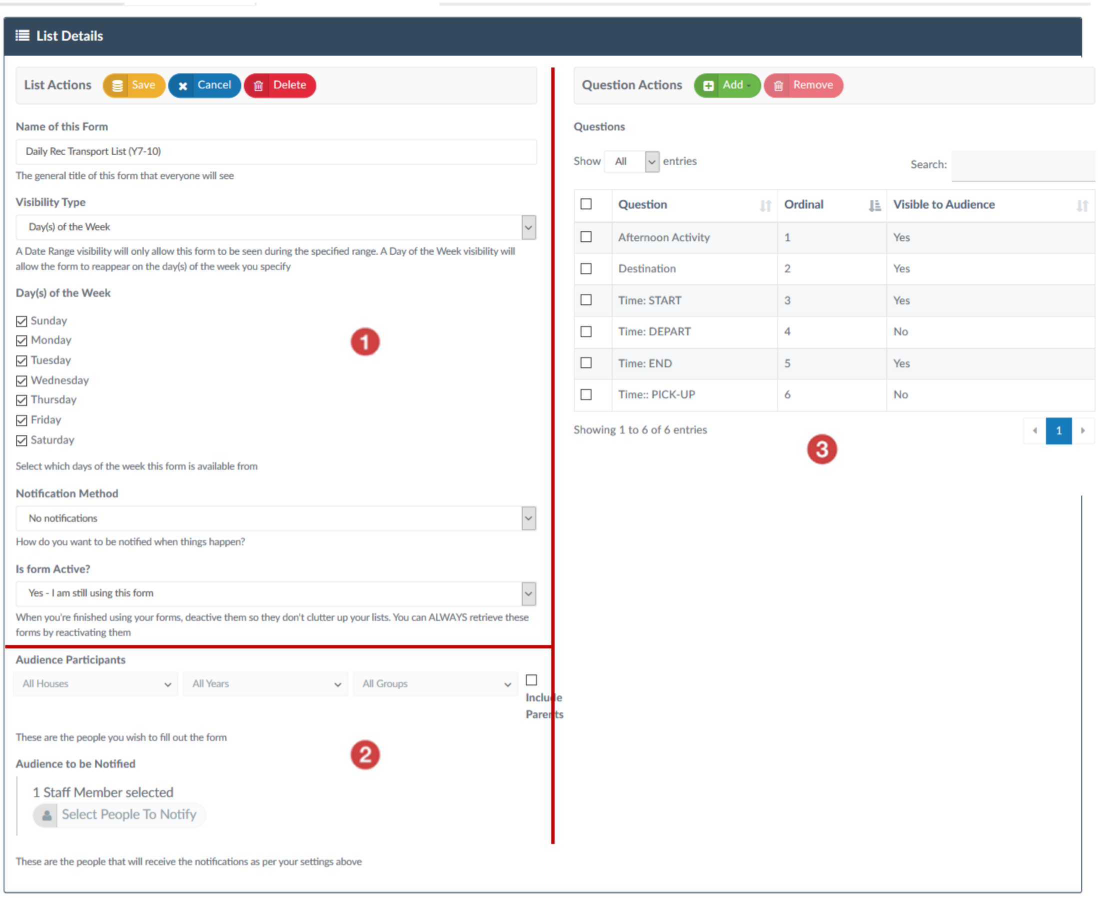
Lists are like any paper form only they are presented to the audience in a digital format. Your lists will be delivered to your audience via their REACH login either on web browser or through the mobile app.

There are three (3) steps to designing your list;

Step 1   List Configuration

Step 2   Set your Audience

Step 3   Define your Questions



33.2.1 Configure your List rules

The configuration details set the basic rules for how your list will function.

Name of the List/Form

Call you list something that provides a clear reference for what the list or form is for.

Validity Type

"When" do you want to display your List or Form? There are three (3) types of validity or frequency that you can set.

i. Date Range
This will set a defined start date and end date for your list or form. This is the date range that the list or form will be visible to your participants.

ii. Days of the Week
Allows you to decide which days of the week your list of form will be displayed. This is ideal for daily lists that are required to appear on the same day(s) each week. Your list or form will clear any collected data at the end of each day and begin the next day with blank data. You can select which day(s) the list will appear for your participants.

iii. Days of the Week with Buffer
Allows you to set a more flexible visibility range on a daily or multi-day basis for your list or form. This is ideal for lists that you want to make available to participants for more than one day at a time on a weekly cycle (eg: list opens Mon and closes Wed each week).

Notification Method

Allows you to set how staff will be notified about data being submitted in your lists or forms. Options available are as follows;

i. **All Participants Completion**
Intended staff contacts will be notified only when all of the participants have submitted their data.

ii. **Notify at Scheduled Date/Time**
Intended staff contacts will be notified at a scheduled Date and Time.

iii. **Notify at Closure Date/Time**
Intended staff contacts will be notified when the list or form closes (ie: no longer visible to any participants).

Active or Inactive

Lists can be active or inactive. Only Active Lists will follow the Validity Type and Notification methods settings. Inactive lists are not visible to participants.

33.2.1.1 Determine the List Participants

There are two types of participants in your lists;

1. Your audience - Students (or parents) who are invited to complete the list.
2. Staff to be informed about the list

Setting your participants is simply a matter of using the filters and the people selector in order to identify who in your community you want to participate as your audience and staff supervisors for the list.

Students who are set to be participants for the list will have the list available to them when they log into REACH on the web portal or mobile app. **Parents** of students can also be added to the audience by selecting the Include Parents option.

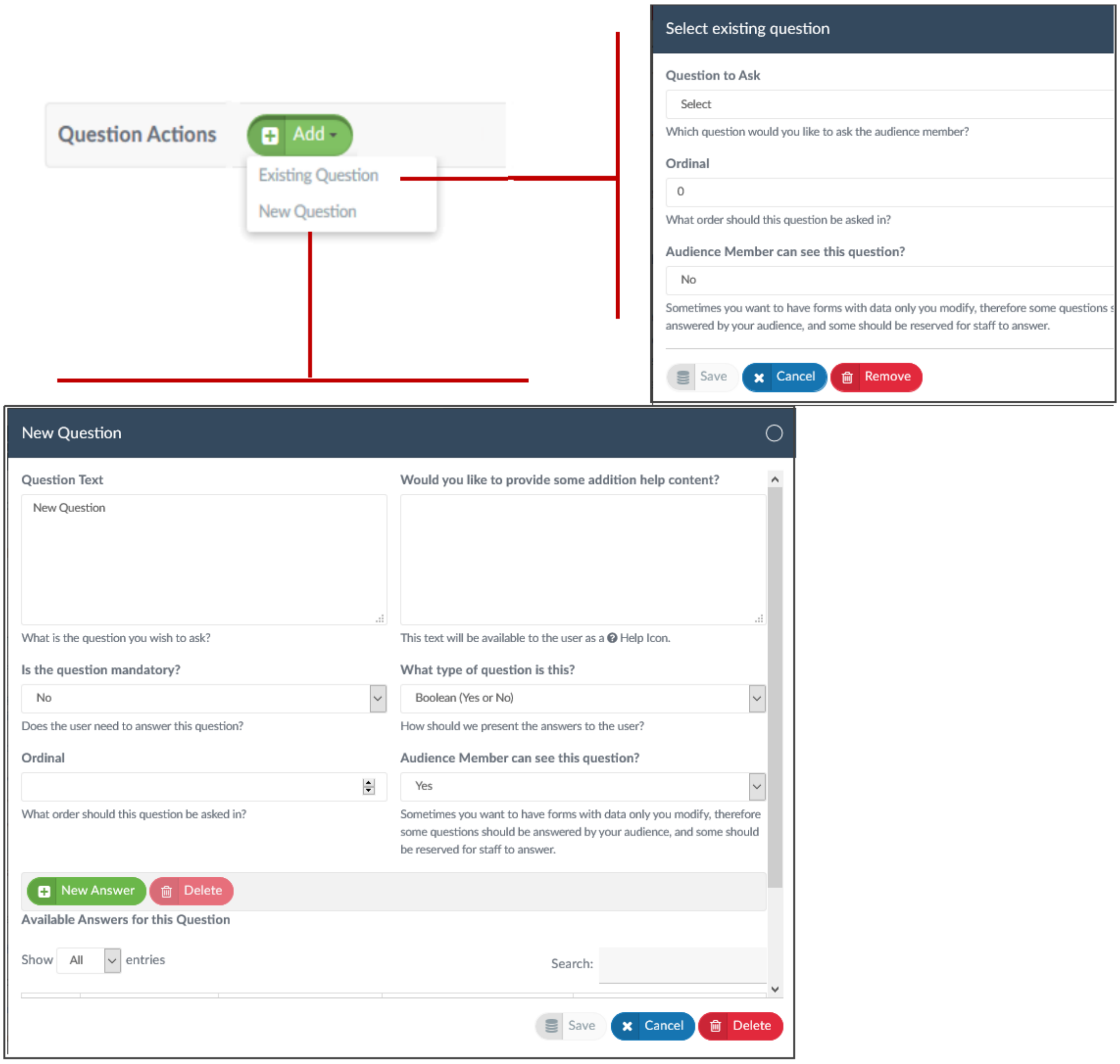
Staff selected as the supervisors for the list will be notified about the list if there are any notifications set in the configuration of your list rules. You do not need to set any staff to be notified for the list to be operational.

33.2.1.2 Define the questions for your List

Questions are the content of your list, what your audience will see. You set the questions for your list in thew Questions Actions section of your List Designer.

You can add questions from question templates that you may have already saved to your question bank or you can add new questions within Question Actions section by selecting the Add button.

‼ Note that any questions added to your list as new questions (ie: not selected from the question bank) will be added to the question bank when you save the list.



Add Existing Question

Clicking on the Add Existing Question button will open the Select Existing Question modal where you are required to configure three (3) settings;

i. Select which Question to add to your List
Select your Question from the table of Questions that you have created in Question Management. Questions may only be used once in your List or Form.

ii. **Set the Order for the Question**
You can arrange Questions on your list or form in whatever sequence you wish by using the Ordinal setting. Questions will display in alphabetical order if no ordinal setting is set.

iii. **Set whether your participants can see the Question**
Set whether your participants can see the Question. Sometimes you may want to add Silent Questions to your list of form that provides supporting data for your output or provides fields that only your staff can see and complete when managing the list in List Management before downloading your output.

Adding New Questions

Adding new questions from the Question Actions section of your List Details screen will open the New Question form. The procedure and settings for this are identical to the Questions Details screen outlines in 33.2.3.1 of this guide.

Hidden Questions

Not all questions need to be seen by your audience.

Sometimes when you are producing a list you may want to include information in your output data that REACH already knows the answer to (eg: a student's year group) or perhaps some data fields that may require a staff member to up[date once the information from your audience has been collected (eg: a Bus departure time may depend on the submitted times for your daily activities). In these instance you can set your questions to **not** be visible to the participants in your list (ie: they are visible only to staff members in the List Management view and in the export data). We call these Hidden Questions.

Published List

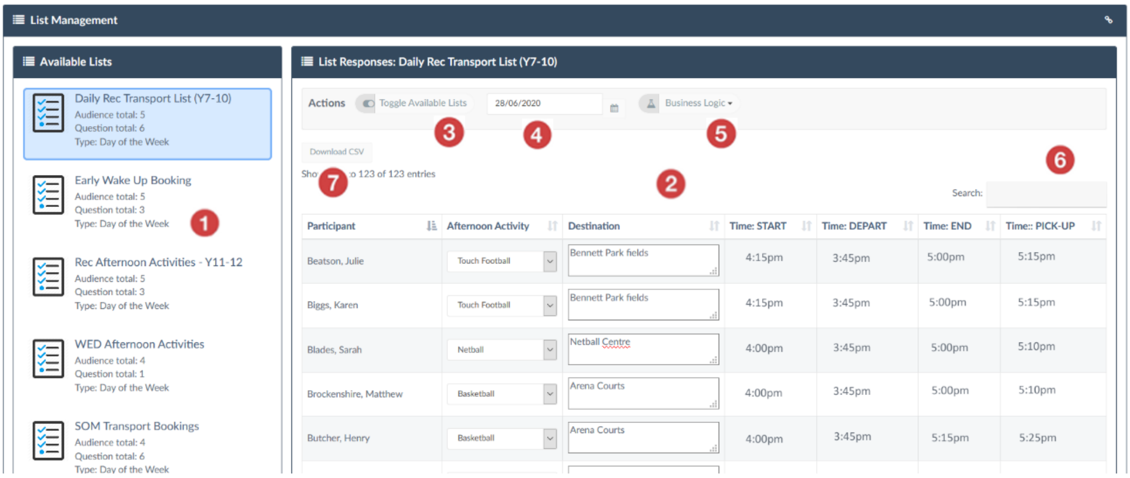
Once you have set your Questions and saved your List Details then REACH will publish the List to your participants according to the schedule that you set in the Validity Type settings of your List configuration.

When a participant has added data and submitted their details then the results are published to your List Management Screen. Your List Management screen will collate all data from all participants for your staff to complete or download.

33.3 List Management

List Management is where you list results are displayed. Data can be viewed, edited and exported from the List Management screen.

The display will present your lists in a table with your designated audience as the row titles and your list questions as your column titles.



	Question Description
1	Available Lists The left side column displays all of your active lists for selection to populate the List Responses display. This column can be opened/closed using the Toggle button (3).
2	List Responses Display Provides details of your list and any responses received. Names of your audience members forms the row headers and each question forma a column header.
3	Toggle Available Lists Open or close the Available lists column. Allows you to close the Available Lists column to achieve a full page width display of your list responses.
4	Date Enter the date to see responses for the relevant date you are seeking. Default view is the current date.
5	Business Logic Some lists may utilise business logic to implement the response data into the REACH system. This logic is built as required so contact your REACH manager if you would like to implement some business logic from your lists.
6	Search Use the Search field to look for any individual in your list.
7	Download CSV Quickly and easily export your results for use in other platforms or systems using the export to csv option.

Rank your results

You can rank your results by clicking on the column header that you want to rank your data by. Clicking multiple times will change the ranking ranking between high-to-low and low-to-high.

Update data in the responses table

When viewing data in the responses table staff an update any fields that need to be completed or edited. Sometimes there may be hidden fields that need completing by staff prior to using the list for its intended purpose or perhaps there are changes to existing data that need to be updated.

Automatic reset

Your list response data table will refresh automatically to whatever schedule you have set in your visibility type setting. For example, Daily lists will reset its response data (clear) every day.

33.4 Audience view of lists

Your audience will see lists displayed in the Lists widget on the home screen of their web login and on the mobile app in the Lists menu item.

When clicking on an open list item your audience members will be presented with the visible components of your published list where they can submit their responses.