Online Reporting System (ORS)

Respondent User Guide

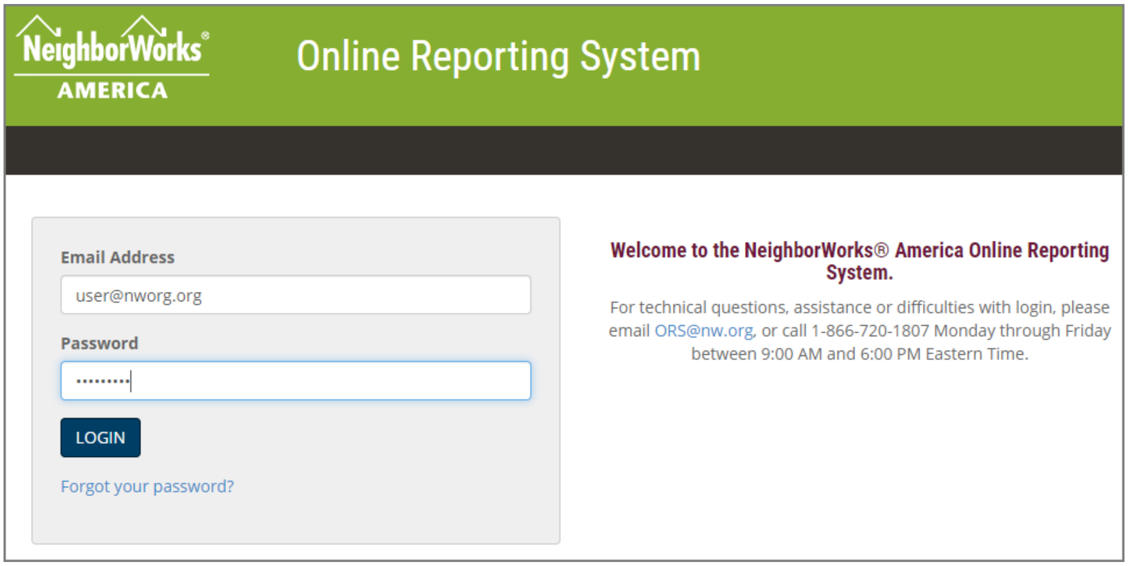
Contents

Last updated 2/16/2021

Logging In

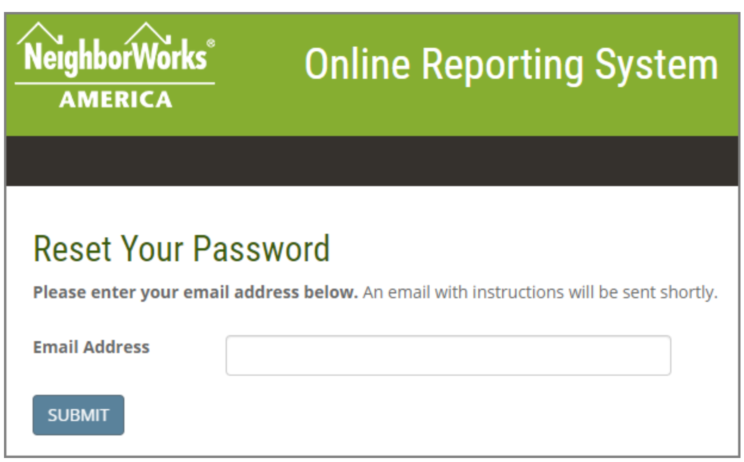
ORS can be found by opening a browser and navigating to https://report.nw.org/

To log in, enter your email address and password.



If you don't remember your password, click the "Forgot your password?" hyperlink under the Login button. Enter your email address and click "Submit" to have an email sent to you to reset your password. Follow the instructions in the 'password reset' email.

Password requirements: 6-15 characters, at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character (e.g. #, @, !, &).



To sign out, simply click the "Sign Out" link in the top, right-hand corner.

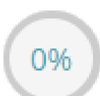
My Surveys

After you log in to ORS, you will be connected to the **My Surveys** page (the home page for ORS). This page displays all the surveys that have been released for your organization to complete. Your organization may have multiple user accounts in ORS so your Executive Director can distribute the work of completing surveys across the organization. Your Executive Director will let you know which survey(s) you are responsible for.

The **My Surveys** page shows all your organization's active surveys (Active Surveys) as well as those surveys that have been submitted previously through ORS to NeighborWorks® (Closed Surveys).

Each survey lists the date the survey is due to be submitted to NeighborWorks®, the progress that has been made in completing the survey (0% - 100%), and the status of the survey.

Survey Status Icons

	**In Progress**	The survey is currently open and is in progress. The 'percent complete' in the center indicates the percent of pages that have been marked "Complete" within the survey.
	**Alert**	The survey has been re-opened for corrections.
	**Past Due**	The survey is currently open and is past-due (not submitted by deadline).
	**Submitted**	The survey has been submitted and is being reviewed as part of the quality control process.
	**Accepted**	The survey has been submitted, the quality control process has been completed, and the survey has been accepted (finalized).

User Management

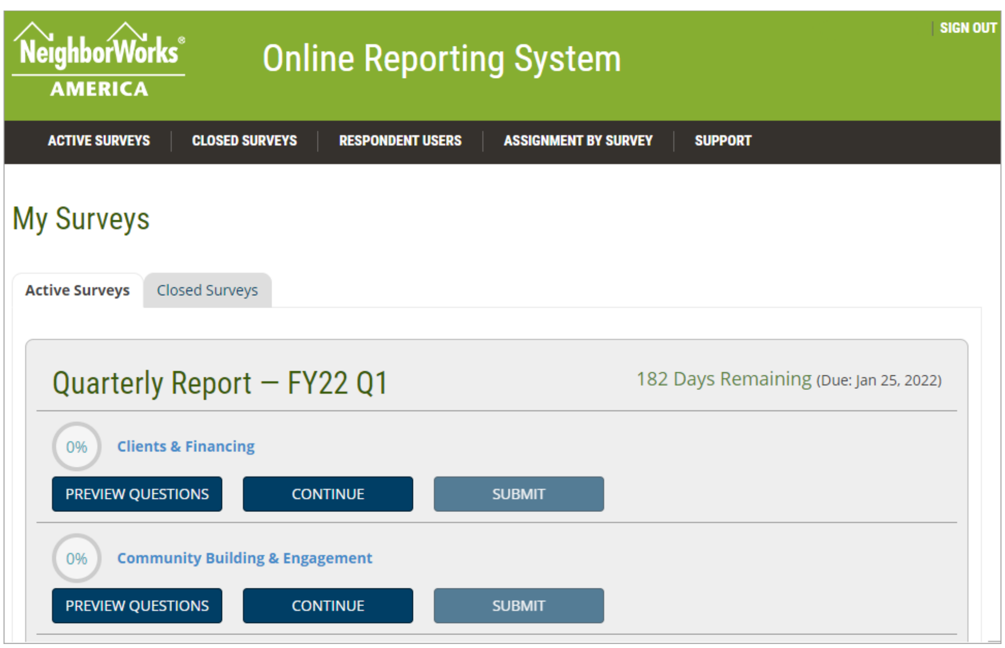
Some individuals within the organization have "Respondent Manager" (admin) access – this means that those individuals (including the Executive Director/CEO) have access to create, edit, and deactivate users for the organization. Respondent (regular, non-admin) users can be given any of the following access levels:

- Preview only
- View and complete (Take Survey)
- View, complete, and submit (Take and Submit)

See the Managing Users section below for more information.

Sensitive Surveys

Some surveys are designated as "sensitive" surveys. They contain questions about information that is not appropriate to be shared with a large audience. These surveys will only display on your My Surveys page if you have user permissions that allow you to see them. Only Executive Directors/CEOs, and those designated by EDs/CEOs have access to sensitive surveys. If an individual needs access to a sensitive survey, the Executive Director/CEO must email datacollection@nw.org for that access to be granted.

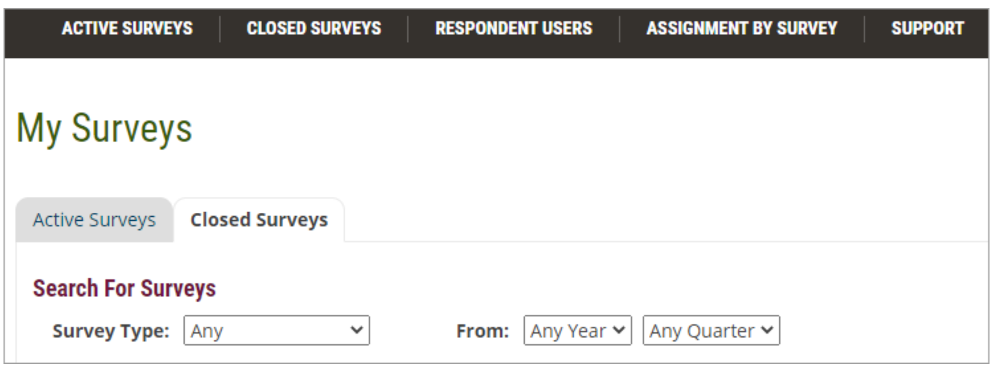


You will see a series of buttons within each survey:

- **Preview Questions** will open a PDF of the survey questions that you can use to share with your team.
- **Begin Survey** will take you to the Table of Contents for that survey. Once you have started a survey, this will change to **Continue**.
- **Submit** will activate once you have started a survey; however, you can only submit a survey once all sections have been completed. You can also submit the survey from the survey's Table of Contents page.

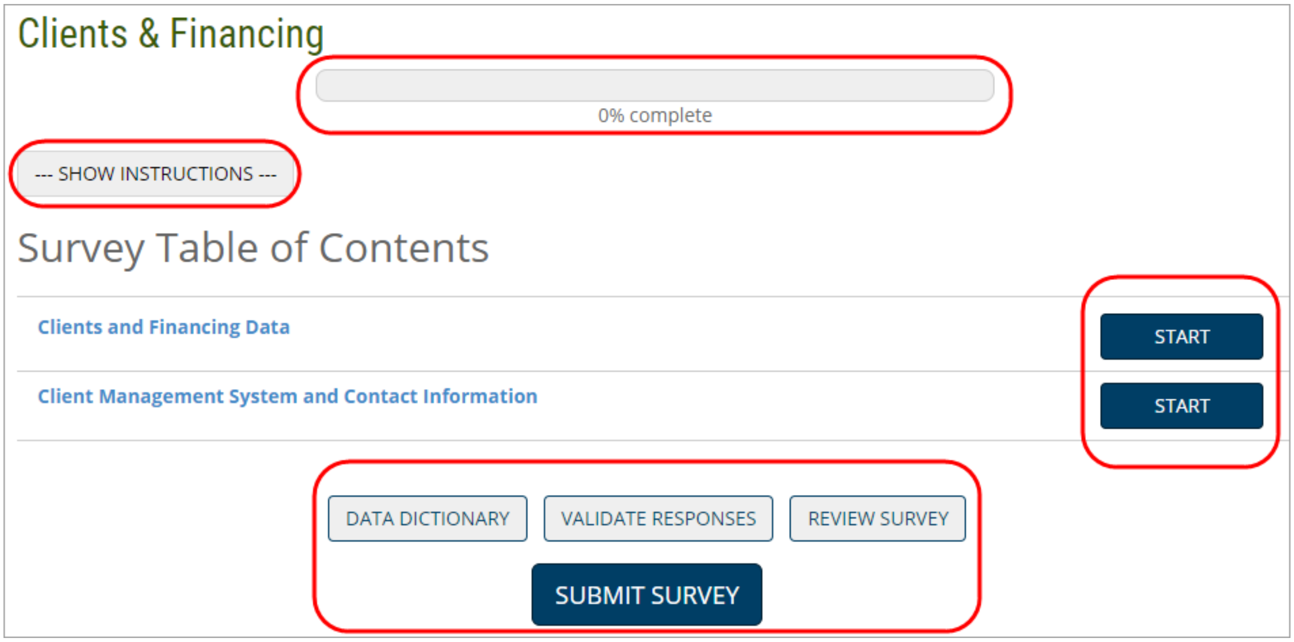
Closed Surveys

You can also access your organization's previously-submitted surveys by clicking either of the "Closed Surveys" tabs at the top of the screen. Once in the "Closed Surveys" section, you can scroll through to find the survey you'd like or can use the search features at the top to search by survey type, year, and/or quarter.



Survey Table of Contents

Once you click "Begin Survey," you will be taken to the Table of Contents page for that survey. From here you can access the survey instructions and Data Dictionary. This is where you will complete each section of the survey and, when all sections are complete, will validate responses and can submit the survey. There is also a progress bar at the top that will indicate how much of the survey you have completed. See below for more information about these actions.

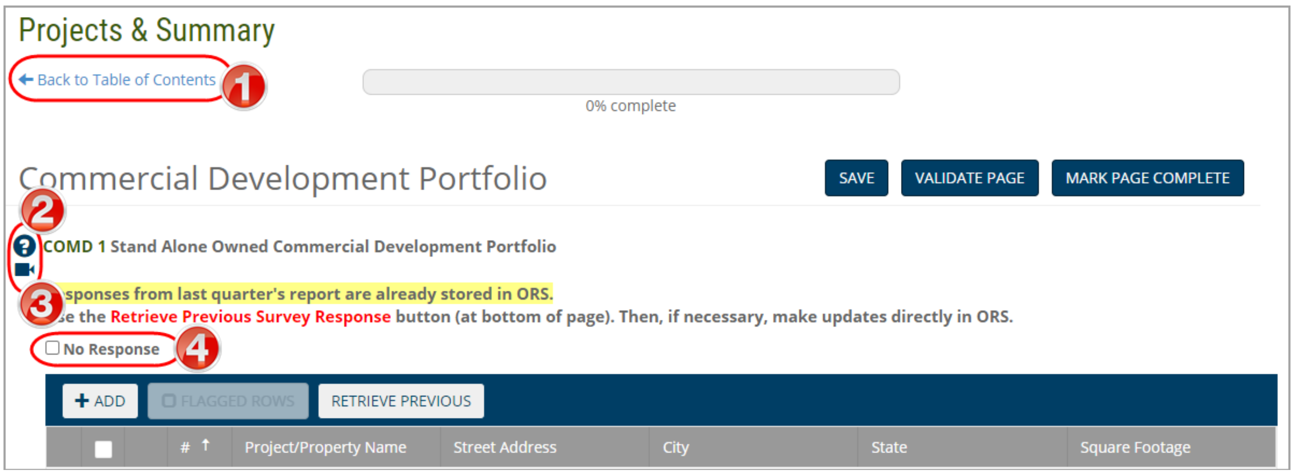


- **Show Instructions** – Clicking this will expand the survey instructions. If you expand the instructions, you can re-collapse them by clicking “Hide Instructions” (same button).
- **Start / In Progress / Completed** - The active buttons for each section will either show a blue “Start” button, a yellow “In Progress” button, or a green “Completed” button based on your level of completion for the section.
- **Data Dictionary** – Clicking this will open an Excel file copy of the Data Dictionary. This is the technical blueprint of the survey. You may find this to be useful if your organization is developing its own client and/or project management database to transfer data to ORS via the upload function. *Note that this is not formatted to be printed.*
- **Validate Responses** – Once you have completed all sections of the survey, marked each page “Completed,” and have resolved any incomplete or flagged items, click the “Validate Responses” button before submitting. This will check for any remaining errors or warnings that the system was unable to flag within an individual page/section.
    - If any issues are identified, those must be resolved before you can submit the survey. If you do need to address issues, be sure to run “Validate Responses” again once you are done to ensure all issues have been addressed before submitting.
    - *This step will also be completed automatically when you click “Submit Survey.”*
- **Submit Survey** – Once you have completed all sections and addressed all flags, you may submit the survey. Clicking this button will trigger a final validation check.

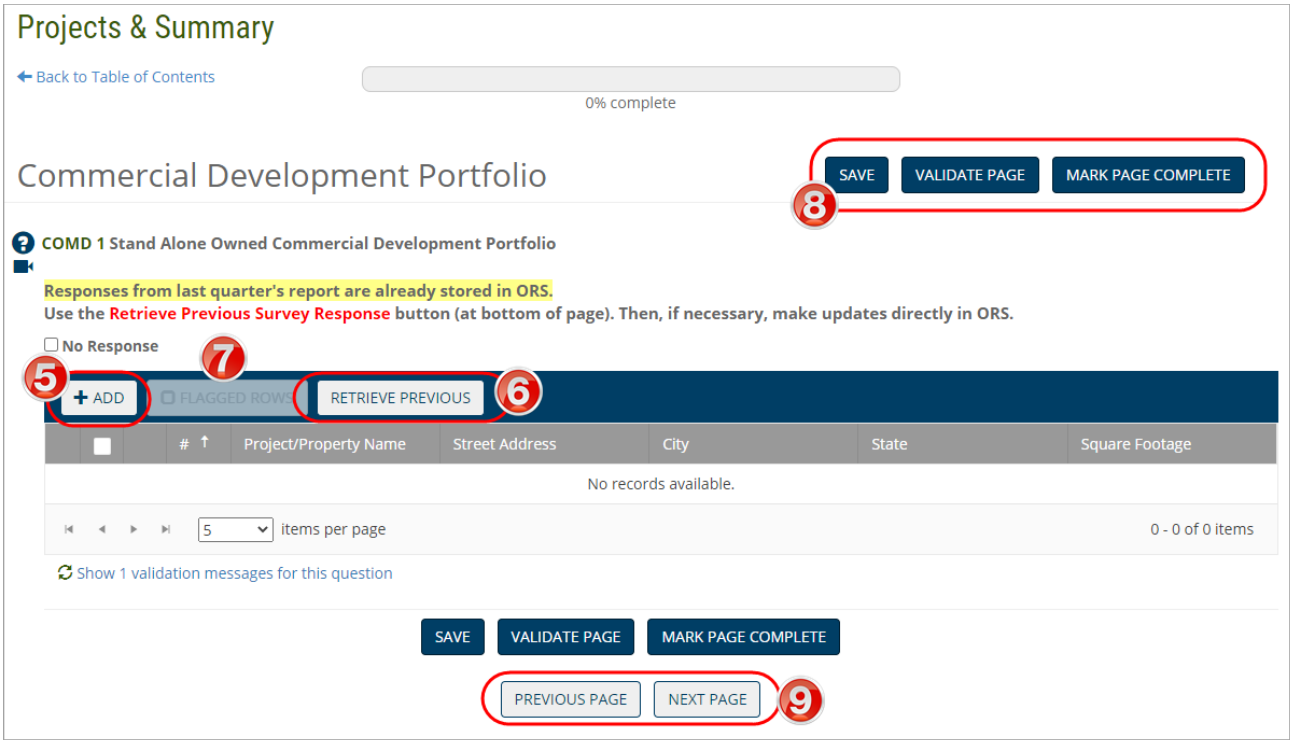
Page Navigation

When completing a survey, you can complete a section and return to the Table of Contents to complete the next section or can use the “Next” and “Previous” buttons at the bottom of the page. Please see the screenshot and associated text below for more information about buttons you may see within a survey page.

You can skip around in each survey, can come back to a page as many times as you would like, and can stop taking the survey at any time. Your responses and progress will be saved for you to continue the next time you log in. If your organization has decided to set up more than one user to complete a section, please coordinate your efforts so only one person is taking the survey at a time.



1. **Back to Table of Contents** – This hyperlink will take you back to the Table of Contents for the survey.
2. **Help Text** – The blue question mark icon will be present throughout all surveys – click the icon to expand the help text for that section or individual item.
3. **Video Tutorial** – The blue video camera icon indicates that there is a video tutorial available for the section. Click on the icon to view a short tutorial explaining how to complete the section.
4. **No Response** – Use this check-box when your organization either doesn’t provide the service or does not have any activity to report for the quarter.



5. **Add New** – Click this button if your organization has new activity to report for the quarter. *If this is a portfolio, click "Retrieve Previous Survey Response" if your organization completed the portfolio in a previous quarter. See below for more information.*
6. **Retrieve Previous Survey Response** – If your organization reported a portfolio in a previous survey, you will see this button. Click this button before completing any additional changes within the grid (e.g. new properties, changes, removing properties). If your organization did not report the identified portfolio in the previous quarter, you will not see this button.
7. **Flagged Rows** – This button allows you to filter the grid/table to show only rows that have active flags (yellow, blue, red) that need to be addressed.
8. **Save / Validate Page / Mark Page Complete** –
    a. *Clicking "Mark Page Complete" will automatically run the "Save" and "Validate Page" features.*
    b. **Save** – This button is optional, but recommended; if you click another navigation button, the system will automatically trigger you to save or discard your changes before proceeding.
    c. **Validate Page** – Once you have completed all entries/changes for the page, click "Validate Page" to ensure all issues have been resolved. If any issues show in the pop-up box (e.g. incomplete items, validation flags) address the issues and re-validate the page before moving on.

   d. **Mark Page Complete** – Once all items have been completed and validated (e.g. no incomplete items or active flags), click this button to mark the page complete.
      i. Once you mark a page complete, you will see a new **Edit Page** button replacing these three Save/Validate/Complete buttons. Click this button to if you need to edit anything on the page, then re-validate and mark complete.

9. **Previous Page / Next Page** – These buttons will take you to the next or previous section within the survey without sending you back to the Table of Contents page.

Grid Navigation

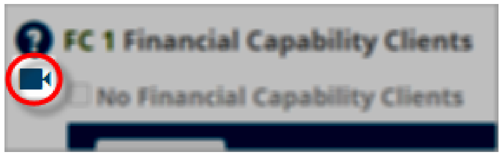
Some surveys will contain grids, like Clients & Financing, Financial Capability, and some sections within the Projects & Summary survey (e.g. portfolios, production). The information below is intended to include basic details about how to navigate a grid within a survey; for more detailed information about each grid/section, please refer to the reporting guide for that survey (available in the ORS Support page Document Library).

There are two different basic types of grids you will see in the Quarterly Production Report – portfolio grids and non-portfolio grids. A "portfolio grid" maintains data that is continuous for your organization, typically identified as owned and/or managed properties. Portfolio grids include the Rental Portfolio, Shared Equity Portfolio, and Commercial Development Portfolio (in the Projects & Summary survey), as well as the Housing Counseling survey grids. Non-portfolio grids are focused on production activities completed within the reporting quarter and include grids like Clients & Financing, Financial Capability, RED Production, Rental Production, etc. For more details about how to complete each individual grid/section, please see the reporting guide for that survey, available in the Document Library in the ORS Support page. There are also video tutorials available for each grid within ORS.

While the grids may serve different functions, navigation within the grids is consistent. The instructions below will provide general information about navigating and completing grids within the surveys.

1. Navigate to the section containing the grid you would like to complete.

    a. In addition to the written reporting guides, each grid includes a short video tutorial. To watch the video tutorial, simply click the video camera icon next to the item text.

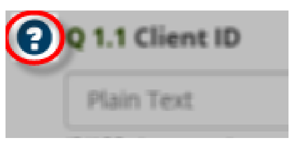


2. There are several ways to complete a grid, depending on the type of grid (e.g. portfolio vs. non-portfolio), your organization's activities for the quarter, and the tracking methods your organization uses for the identified data.
    a. **Portfolios**
        i. <u>If completing a portfolio grid</u> (i.e. Rental Portfolio, Shared Equity Portfolio, Commercial Development Portfolio), click the "Retrieve Previous Survey Response" button at the top of the grid to import your organization's properties from the previous quarterly survey. If needed, changes can be made once the properties have been imported from the previous quarterly report.
            1. *This step is important, as it ensures consistent data is imported and saves a significant amount of data entry time.*
            2. *If this is your organization's first time reporting properties in the selected portfolio, you will instead follow one of the two processes below to create your new portfolio (import or manual entry). Then in subsequent quarters, you will use the "Retrieve previous survey responses" button to import those entries.*
    b. **Non-Portfolio Grids**
        i. <u>If your organization has had no activity for the reporting quarter</u>, opt out by checking the "No ___ to report this quarter" box.
            1. *You should only opt out of a portfolio grid (Rental Portfolio, Shared Equity Portfolio, Commercial Development Portfolio) if your organization has no properties within the identified portfolio (e.g. no rental properties owned or managed by your organization would mean you'd opt out of the Rental Portfolio grid).*
        ii. <u>If your organization had activity during the quarter **and has** an Excel file to upload for the grid/section</u>:
            1. Click "Add New"
            2. Select the file for upload
            3. Click "Begin Import"

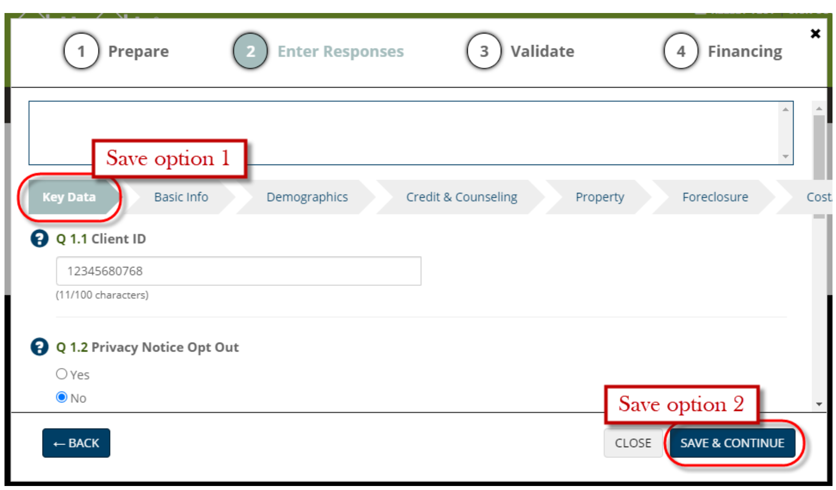
4. ORS will import your Excel file and you can then address any pending issues (e.g. incomplete items, validation flags) and complete the section.
5. If there is a second upload needed (e.g. Financing file in *Clients & Financing,* Address file in *RED Production*), repeat the steps above to upload the second file before addressing any validation issues.
6. Once all incomplete items/validation issues have been addressed, click "Validate Page" one last time to confirm that all issues have been resolved and click "Mark Page Complete" to complete the section.

iii. If your organization had activity during the quarter and **does not have** an Excel file to upload, click "Add New" and "Begin Guided Entry."

3. The remaining instructions below are intended for guided (manual) entry within grids, which may be used to enter new data, make changes to existing entries, or to address incomplete items or validation flags identified from uploaded data.
4. **Accessing help text**
   a. To access help text for an item, click the question mark symbol. You can click this symbol again to re-hide the help text.

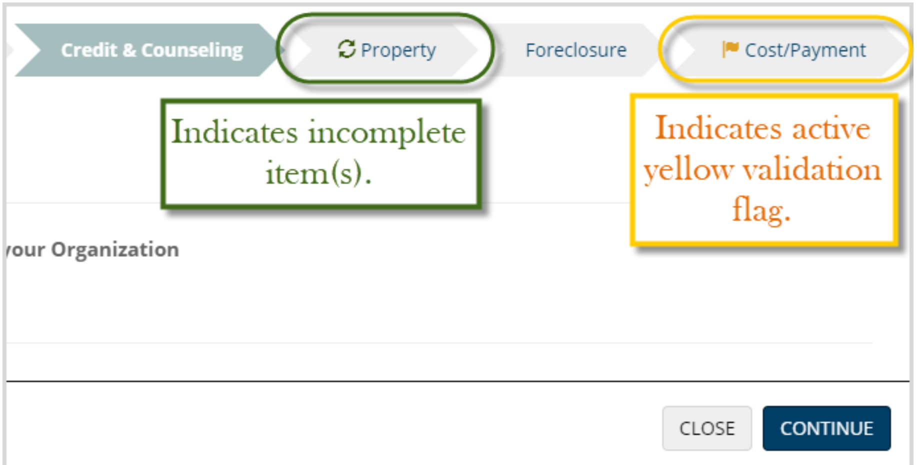


5. **Completing tabs and saving data**
   a. To complete a tab, simply complete all items on the page (be sure to scroll to the bottom). Data on the page will be saved by clicking "Save and Continue" in the bottom right or clicking the active tab to refresh/save the data. *Note that "Save and Continue" will complete two functions for you – it will save the data on the current tab and take you to the next tab in the grid.*



This sample image is from the Clients & Financing survey.

b. Tabs will include symbols if there are remaining action items. In the sample image below, we see an incomplete symbol for the "Property" tab, indicating that there are one or more incomplete items remaining in the tab. We also see that there is an active yellow flag in the "Cost/Payment" tab.

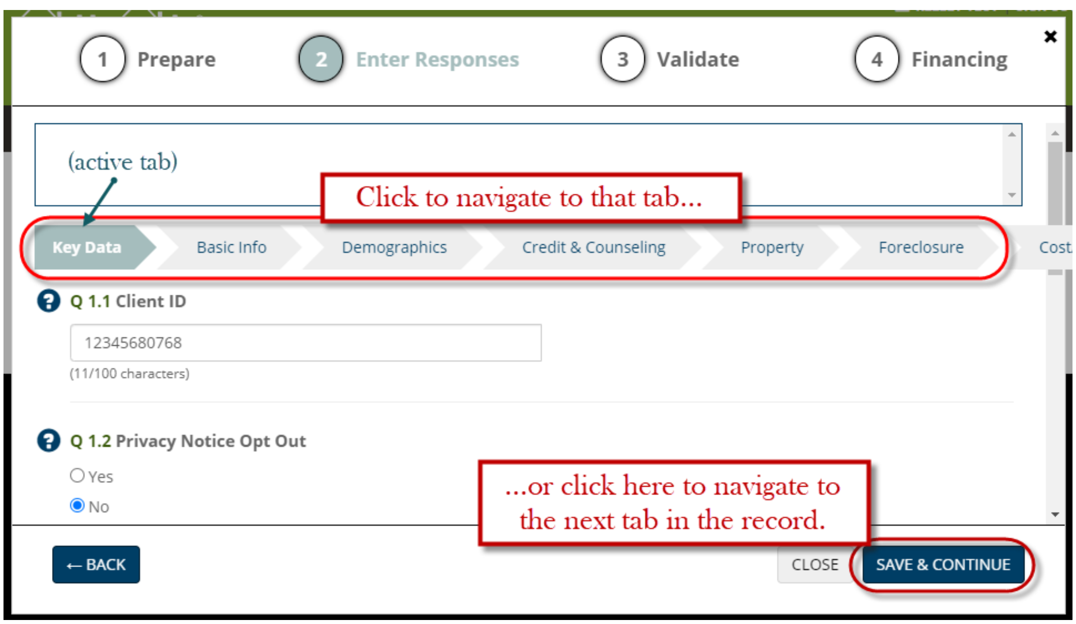


This sample image is from the Clients & Financing survey.

6. **Navigating to the next tab within the grid**

a. The active tab (the tab you currently have open) will show in a darker color than the other tabs in the record (demonstrated in screenshot below).

b. As mentioned above, clicking "Save and Continue" will take you to the next tab within the grid. However, you can also click on the tabs at the top to navigate within the grid as well.



This sample image is from the Clients & Financing survey.

7. **Validating responses within a record**
    a. Once you have completed the final tab for the current record, the bottom, right-hand button will show "Save and Validate." Click this button to save the responses in the current tab and validate the entries within the record.

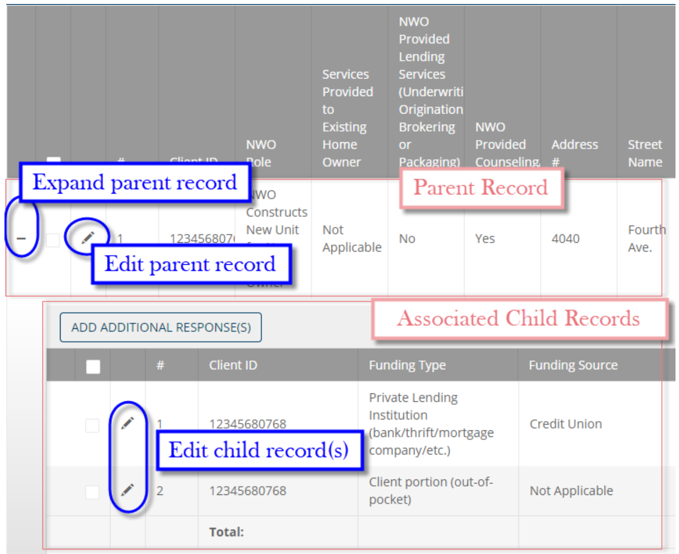
    b. If the system identifies any incomplete items and/or validation flags, address the issues appropriately.

8. **Completing a child grid** (if applicable)
    a. Once you complete the final tab in the grid, you will be prompted to complete child grid data only if a child grid exists (e.g. the Financing data in *Clients & Financing,* Address data in *RED Production*, etc.). If there is no child grid, you will be prompted to validate and close (noted above).

This sample image is from the Clients & Financing survey.

    b. Click the prompt at the bottom right and click "Add New" to add the child grid entry.
    c. *For information on completing a specific grid, please see the reporting guide for that survey (available in the Document Library on the ORS Support page).*

9. **Reviewing and editing grid entries**
    a. To open a record (either to review the entries or make edits), click the pencil symbol to the left of the desired record; this will open the tab navigation view for the entry.
    b. To expand a parent record to show the child records (where applicable), click the "+" symbol to the left of the parent record. *To review/edit child records, click the pencil symbol to the left of the appropriate child record.*

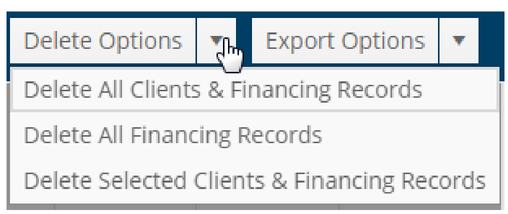


This sample image is from the Clients & Financing survey.

10. **Deleting records**

   a. <u>To delete selected records in the grid</u>: Select the record(s) that you would like to delete and click the "Delete Selected" button at the top of the grid.

      i. *Grids that have child records will have a "Delete Options" drop-down menu. If this is the case, click the drop-down to select the "Delete **Selected**..." option.*



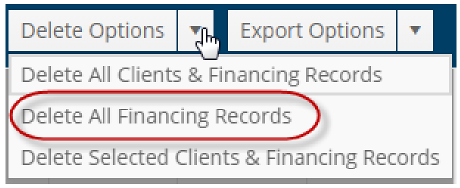
This sample image is from the Clients & Financing survey.

   b. <u>To delete all records in the grid</u>: Click the "Delete All" button at the top of the grid.

      i. *Grids that have child records will have a "Delete Options" drop-down menu. If this is the case, click the drop-down to select the "Delete **All**..." option.*

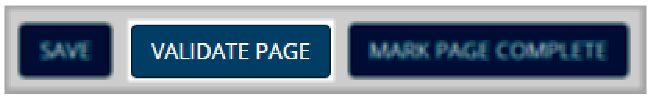
   c. <u>To delete child records (and not the parent record)</u>: Expand the parent record so all child records show. Select the child record(s) that need(s) to be deleted and in the child record section, click the "Delete Options" menu to select the "Delete Selected..." option.

      i. *If you would like/need to delete all child records that have been uploaded/entered, click the "Delete All XX [child] records" option in the drop-down menu.*



This sample image is from the Clients & Financing survey.

11. **Validating responses for the entire grid**
    a. Once all entries have been completed, validate the page by clicking the "Validate Page" button.



    b. Address any issues (i.e. incomplete items, validation flags) identified and re-validate the page once all issues have been addressed.
    c. Once the system notifies you that all responses are valid, click "Mark Page Complete" to complete the section.

12. **Exporting grid data**
    a. If you would like to export the data that you have entered, simply click the "Export" button at the top of the grid once you have completed all data entry in that grid. *This can be done while the page is active or after it has been marked "Complete."*

Validation Errors (Flags)

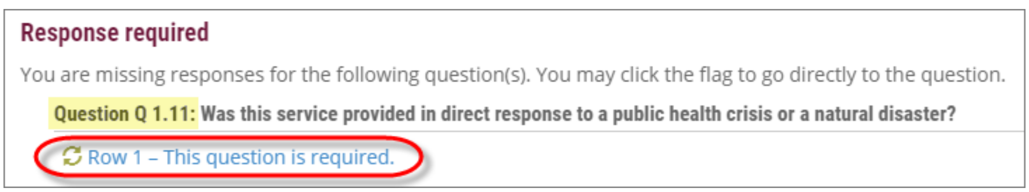
There are four types of validation messages (flags) in the Online Reporting System. The validation flags are integrated into the system to assist you with maintaining data integrity and offer information about what "typical" responses may be.

Incomplete		This symbol indicates an incomplete item. This item must be completed before the page/section can be marked "Completed." *Surveys cannot be submitted with incomplete items.*
Red Flag		This symbol indicates a red flag. The issue described in the validation message must be fixed before the page/section can be marked "Completed." *Surveys cannot be submitted with active red flags.*

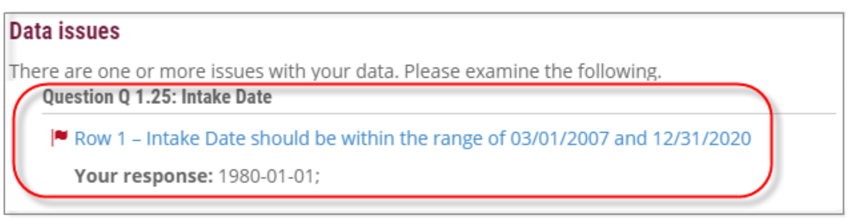
Blue Flag		This symbol indicates a blue flag. The items/issue described in the validation message must be reviewed and either resolved (if responses were incorrect) or a [required] explanation provided (if responses are correct) describing why the data is correct as-is. *Surveys cannot be submitted with unaddressed blue flags.*
Yellow Flag		This symbol indicates a yellow flag. Similar to a blue flag, the items/issue described in the validation message must be reviewed and either resolved (if responses were incorrect) or an [optional] explanation provided (If responses are correct) describing why the data is correct as-is. *While surveys can be submitted with unaddressed yellow flags, it is strongly encouraged that sites address these flags, as the Data Collection team may contact you with questions during the quarterly analysis if an explanation was not provided.*

How to Address a Flag

- **Incomplete**
  - If you have an incomplete item, the system will pop up with an error similar to the one in the screenshot below. To navigate to the incomplete item, simply click the hyperlinked message or you can manually navigate to the item using the item number.

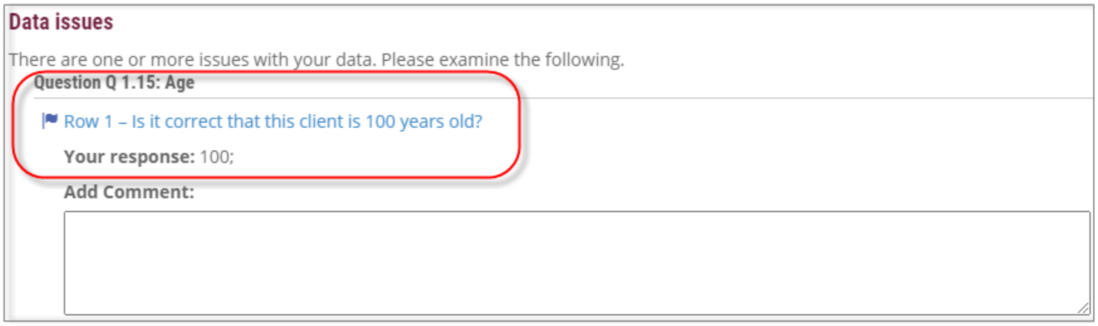


- **Red Flag**
  - If you have a red flag, the system will pop up with an error similar to the screenshot below. You will need to fix the issue and can do so by clicking the hyperlinked validation message.

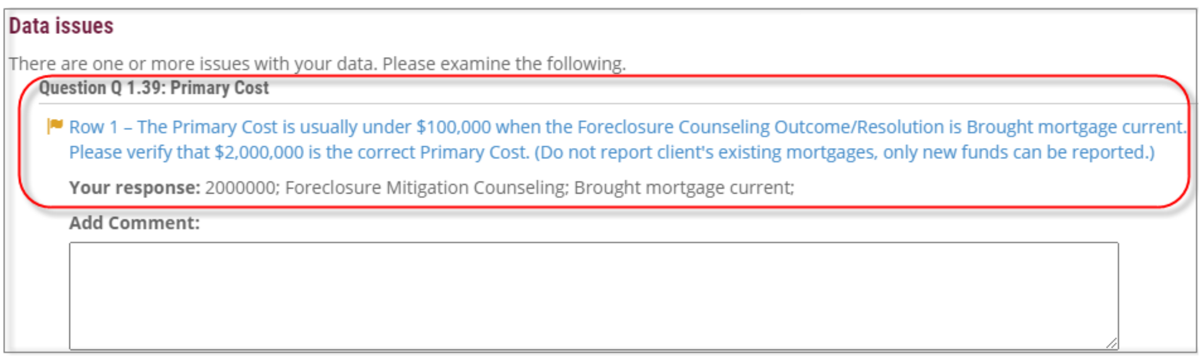


- **Blue Flag**
  - If you have a blue flag, the system will pop up with an error similar to the screenshot below. You will need to either fix the data (if it is not correct) or enter an explanation (if the information is correct) describing why the information is correct as-is. You can

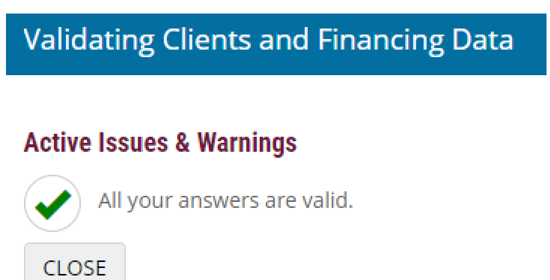
click on the blue hyperlinked validation message to navigate to the questions if you'd like to review further. *If the issue is not resolved, a comment is required.*



- **Yellow Flag**
    - If you have a yellow flag, the system will pop up with an error similar to the screenshot below. You will need to either fix the data (if it is not correct) or enter an explanation (if the information is correct) describing why the information is correct as-is. You can click on the blue hyperlinked validation message to navigate to the questions if you'd like to review further. *If the issue is not resolved, a comment is strongly recommended.*



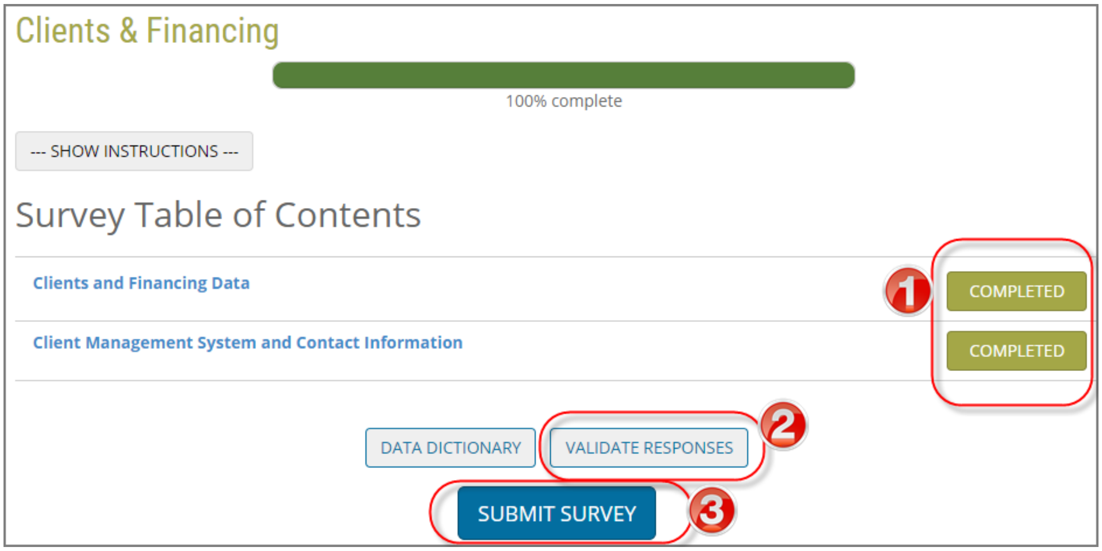
Once all issues have been resolved, re-validate the page. When you see the message below (and all applicable data has been entered on the page), you can mark the page as "Complete."



Submitting Surveys

In order to be submitted, all surveys must be completed, and all validation flags must be addressed.

1. Navigate to the Table of Contents for the survey.
2. Ensure that all sections show the green "Completed" button.
3. Click "Validate Responses" to ensure all issues have been addressed.
4. Click "Submit Survey."
    a. *The survey will now show as "Submitted" on the **My Surveys** page.*

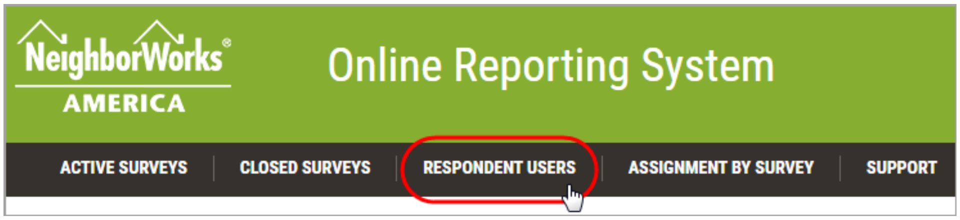


Managing Users

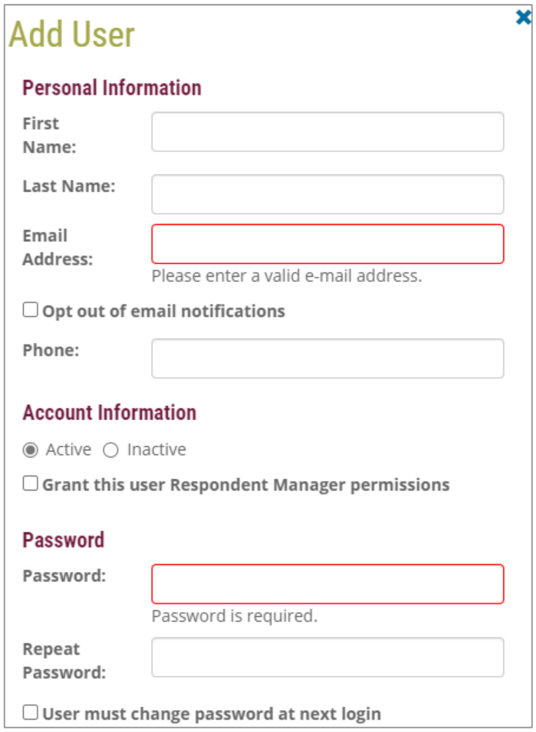
Adding a New User

Organizations' Respondent Managers can create new ORS user accounts as appropriate for users within their organization. Users can have view-only, take-only, or take and submit access. Respondent Managers can also create other Respondent Managers within the organization. If you are unsure who your organization's Respondent Managers are, please feel free to email datacollection@nw.org to request that information or to assist with creating a new user account.

1. From the **My Surveys** screen, click the **Respondent Users** tab at the top.

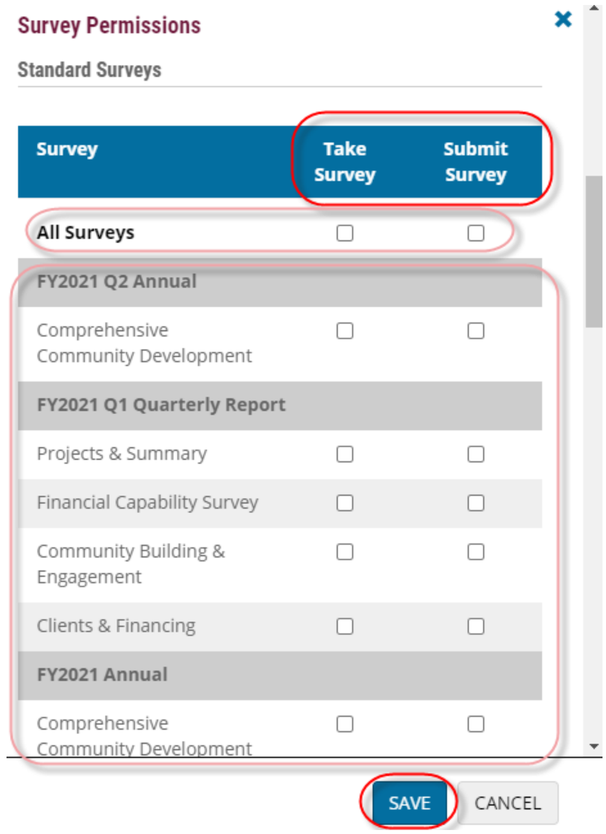


2. Click "Add User" at the bottom of the screen.



3. **Personal Information**
    a. Enter the user's first and last name, email address, and phone number (if available).
    b. By default, all ORS users will receive system notifications (e.g. when a new survey opens, survey overdue notice). If you do not want this individual to receive those messages, check the "Opt out of email notifications" box.
4. **Account Information**
    a. Leave status as "Active."
    b. Only check the "Grant this user Respondent Manager permissions" box if you want the new user to have access to create, edit, and deactivate ORS users. *We recommend limiting this capability to only those who need it.*
5. **Password**
    a. Enter a password for the new user. Repeat the password in the second box.
    b. Check the "User must change password at next login" box. This ensures the user creates a new, unique and secure password.

6. **Survey Permissions**
    a. Scroll down to set survey permissions. The system defaults to "View only" access.
    b. You can set access by survey, if a user only needs access to particular surveys, or can give full access to all surveys (except sensitive).
    c. **Standard Surveys**
        i. View / Take / Submit
            1. Leave settings as-is if you would like the individual to have view-only access.
            2. Select "Take Survey" to give the user access to complete a survey.
            3. Select "Submit Survey" to give the user access to submit a survey.
            4. *Users can have Take Survey or Submit Survey access individually or can have both. Neither is dependent on the other.*
        ii. All Surveys / Selected Surveys
            1. ***All Surveys*** – this will give the user access to all standard surveys that are currently open and those that will be opened in the future. *For example, if you create the user in FY21 Q2, they will have those same settings when FY21 Q3 becomes available.*
            2. ***Selected Surveys*** – if the individual does not need access to all surveys, select the appropriate access level (take/submit) for the surveys they will need access to.

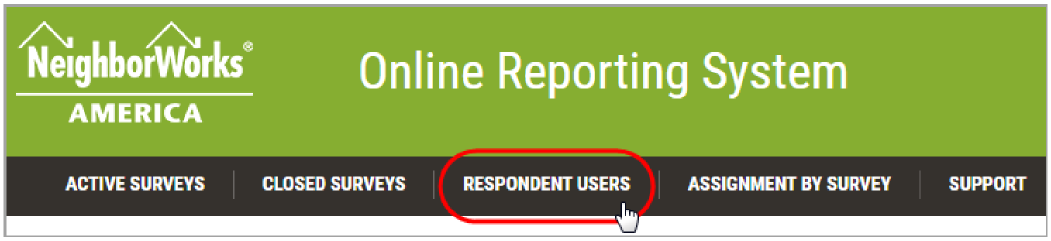


7. **Sensitive Surveys**
    a. Respondent Managers cannot grant Sensitive Survey access. By default, only the Executive Director/CEO can access (view/take/submit) these surveys. If another individual at the organization needs sensitive survey access, the Executive Director/CEO must email datacollection@nw.org to request that access.
    b. *This typically includes the Salary Information survey within the Annual Survey.*
8. **Targeted Surveys**
    a. Scroll to the bottom to set take/submit survey access for targeted surveys.
    b. *These surveys are designed for a very specific set of users within an organization. There are no default users assigned as each target survey audience is unique. Users will be assigned to these surveys by NeighborWorks based on target audience desired.*
9. Click **Save** to complete the new user creation.
10. Email your new user the link to ORS (https://report.nw.org), their login ID (their email address), and their password. Let them know that they will be required to change the password when they log in.

Edit (Single) Existing User

Organizations' Respondent Managers can edit ORS user accounts as appropriate for users within their organization and can reset passwords for users.

1. From the **My Surveys** screen, click the **Respondent Users** tab at the top.

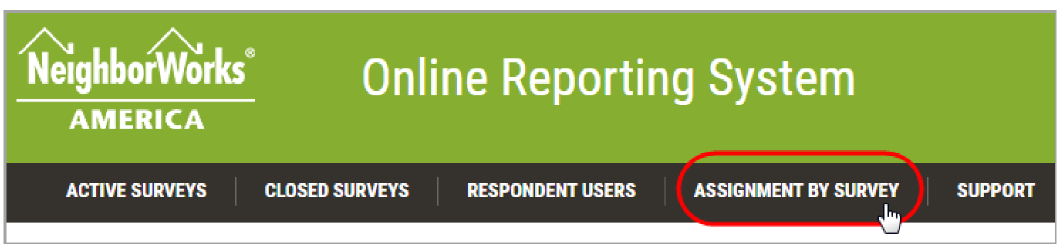


2. Click the hyperlinked name of the user you'd like to edit.
3. Edit the password or other access as desired (see above for more information about survey access).
4. Save and close.

Edit Access for Multiple Users

If your organization would like to change settings for multiple users, you can follow the instructions above to edit each individual user, or can edit multiple users via the Assignment by Survey feature.

1. From the **My Surveys** screen, click the **Assignment by Survey** tab at the top.



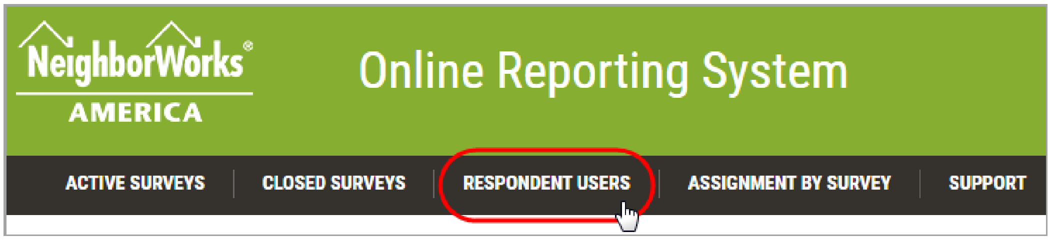
2. Click the hyperlinked name of the survey you'd like to edit.
3. Edit user assignments as appropriate.
4. Save and close.

Deactivate User

Users should be deactivated when they leave the organization or no longer need access to the Online Reporting System. This ensures the data your organization has reported is appropriately protected.

Respondent Managers can deactivate users in ORS or you can email datacollection@nw.org to request that a user be deactivated.

1. From the **My Surveys** screen, click the **Respondent Users** tab at the top.



2. Click the hyperlinked name of the user you'd like to deactivate.
3. In the **Account Information** section, select the "Inactive" radio button.

4. Save.

Support

In addition to help text and video tutorials throughout the surveys, the ORS Support page includes a lot of helpful information. However, if you are unable to find an answer to your question or have a unique activity that you're unsure how to report, please contact datacollection@nw.org.

The **Support** page in ORS includes:

- Regional Data Management team contact information
- Upcoming reporting/ORS trainings
  - *Recordings of recent training webinars will also be posted here.*
- Important announcements
- Document library
  - *Reporting and other user support guides, file upload templates, data dictionaries, and survey previews.*
- Basic information about quarterly and annual surveys
- Links to additional NeighborWorks resources