CASE Insights^{SM} on Philanthropy (Canada) in partnership with CCAE

CASE Insights^{SM} Survey Site Getting Started

July 2024

Getting Started

Access to the Survey

The Canadian philanthropy survey must be completed and submitted via the CASE Insights survey website. The site requires a user account that is separate from your general CASE website member account. To request a new survey user account or make changes to your institution's existing survey contacts, email the CASE Insights staff at insights@case.org.

Activating the Survey for Data Entry

After logging into the CASE Insights survey website, click on the active CASE Insights on Philanthropy (Canada) survey on the home page. This takes you to the survey menu. In the Survey Status section at the top, check the box that says, "My institution **WILL** complete this survey." This activates the survey for data entry. Your institution's survey contacts will receive reminders about the survey until it is submitted.

Survey Validation and Submission

As you are entering data, each section of the survey has error checks that run automatically when you save that section. Failed validations appear in the upper right corner. Note that you will see errors for any required questions that have not yet been answered, in addition to any errors on completed questions, so you may wish to wait until you are close to completion to review the errors in detail. Select the "Hide" button to minimize the notification as you complete entering data.

You can also manually check your survey for errors if you wish by going to the Completion Process section at the bottom of the survey menu and clicking, "Check your survey for common problems." This view provides a summary of all validation errors in all sections of the survey.

There are three error levels:

- Fatal errors (skull icon) must be fixed before you can submit your survey.

- Serious errors (exclamation point icon) must be fixed or annotated before you can submit your survey. To annotate click, "Add Comment."

- Warnings (question mark icon) require no specific action but indicate data may be out of the ordinary and deserve your review.

Error messages tell you which sections and specific questions have errors along with more details about the issue. Click to return to the section/question with the error or the survey menu. You will see the failed validation within the section near the upper right. The survey menu will show error-level icons next to sections that have errors.

After you fix your errors, you must return to the Completion Process section of the survey menu and re-run the error checker to clear them. Failed validation messages and error icons do not disappear until you do so. If you still have remaining errors and need assistance on how to resolve them, email the CASE Insights team at insights@case.org.

Submitting Your Survey

When you have finished your survey, check the Survey Status box that says, "My survey is **complete** and ready for review." The built-in error checks will run automatically. If you receive any error messages, you must correct or annotate the errors. **Your survey is not submitted for review if it has errors.**

After you have made your corrections, re-check the box to indicate your survey is complete. If no errors remain, your survey will be submitted for review, and you will see a confirmation notice onscreen.

CASE will review all data submitted and attempt to identify any obvious errors or inconsistencies. CASE will contact participating institutions to clarify or correct apparent errors in submitted data.

Email the CASE Insights team at insights@case.org if you need assistance with errors.

Additional Resources

There are written instructions within the online survey instrument. In addition, you can hover over many of the row and column headers in the questions for additional help and definitions.

In addition to this survey site Getting Started document, you can find resources on the CASE Insights on Philanthropy (Canada) in partnership with CCAE website, including:

- Survey Guidance Document
- A PDF of the survey with all the questions.
- Excel data collection grids that you can use to gather your data before entering them online if you wish to do so.

For assistance, contact the CASE Insights team at insights@case.org.