

Evaluation Management

Purpose: Learn how to build, edit, and manage evaluations

- **What is an Evaluation?**

A survey that learners take after completing a course in TRAIN

- **Evaluation Reporting**

View our [Evaluation Reporting](#) user guide for additional information

Administrative Roles with Access:

- **Evaluation Manager**
- **Course Provider**

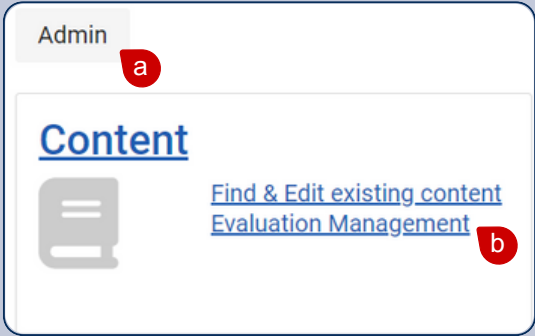
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1

Navigate to Evaluation Management

Go to the (a) **Admin** menu. Click the (b) **Evaluation Management** link under the **Content** tile.



Create an Evaluation

On the Evaluation Management page, click the **Add Evaluation** button. Then, fill in the required evaluation settings.

2



Cancel

Save

Evaluation settings

(Fields marked below are required)

Name

Title

☐ Anonymous results

Date range

from

Start Date

to

End Date

08

00

AM

09

00

AM

Availability

Add

Administrators from these groups will be able to edit this Evaluation and assign it to their courses

National

- (a) **Name:** Type the title of your evaluation here.
- (b) **Anonymous results:** Check this box if you do *not* want learner's names attached to their responses in evaluation reports.
- (c) **Date range:** Provide a start date/time and an end date/time if you want to limit the time period learners can access the evaluation. If the evaluation end date passes and the course is still active, learners can still complete the course without taking the evaluation.

TIP: Required fields are marked with a red bar.

Create an Evaluation (continued)

2

Add or remove groups. Administrators from each group can edit and assign the evaluation to their courses.

Availability

Administrators from these groups will be able to edit this Evaluation and assign it to their courses

National

Add

X

Select Group

Illinois

+

National/Illinois

+

National/Illinois/Lee

+

National/Illinois/Bond

+

National/Illinois/Cass

+

National/Illinois/Clay

+

National/Illinois/Cook

+

National/Illinois/Ford

+

National/Illinois/Kane

+

National/Illinois/Knox

+

National/Illinois/Lake

Cancel

Apply

- (d) Click the blue **Add** button to view available groups for the evaluation.
- (e) Type keywords into the search bar to find a group.
- (f) Click the green **plus (+)** button to select a group.
- (g) Click the green **Apply** button to ensure the selected group has access to the evaluation.
- (h) Click the **X** button to remove a group's access to the evaluation.

Once you have filled in the required information, remember to click the green **Save** button in the upper right corner of the Evaluation Settings page.



Add Questions to an Evaluation

3

Questions (0)

Add Question

There are no questions defined for this evaluation.

On the Evaluation details page, scroll down to the Questions section and click the **Add Question** button.

Add question

Sample Evaluation

Choose a question type

Multiple Choice

True/False

Yes/No

Check All That Apply

Fill in the Blank

Rating (Likert scale)

Essay / Short Answer

Matching

Find and clone a question

Next

- (a) Select a question type for your evaluation.
- (b) To copy a question from an existing evaluation, click the **Find and Clone a question** button.
- (c) Click the **Next** button.

Add Questions to an Evaluation (continued)

3

Fill in the required evaluation question details.

- (d) Enter your question text here.
- (e) Click the **Add an answer** button.
- (f) Type your question answers here.
- (g) Select the green check button to save your answer.

Cancel

PreviewSave

Add Check All That Apply question

(Fields marked below are required)

Question text

B I H [list icon] [list icon] [quote icon] [link icon] [image icon] Preview

Where will you use the content of this course in your life?

Attach an image ?

Learners can select up to

Answers

Show answer options in a random order

+ Add an answer

TIP: Question setup will differ depending on the selected question type.

Answers

Show answer options in a random order

At work

At home

Edit question answer

x

g

B I H [list icon] [list icon] [quote icon] [link icon] [image icon] Preview

During recreational activities

Attach an image ?

Other

Learners can select up to

h

Answers

Show answer options in a random order

i

At work

At home

During recreational activities

+ Add an answer

Edit

Delete

- (h) If you want to limit the number of answers learners can select, input the value here.
- (i) Use the six-dot button to drag and reorder the answers.
- (j) Click the three-dot menu to Edit or Delete an answer.
- (k) Click the **Preview** button to view how your question will look to learners, then click the green **Save** button.

On the Evaluation review page, you can edit the order or conditions of questions.

Questions (3) Move questions Edit conditions Add Question

#	Question	Type
1	What did you think of the course? <div>Loved it Hated it Tolerated it</div>	Check All That Apply

To rearrange the order of questions, click the **Move questions** toggle. Use the arrows to adjust the question sequence.

Move questions

Questions (3) Move questions Edit conditions Add Question

Move	#	Question
	1	What did you think of the course? <div>Loved it Hated it Tolerated it</div>
	2	How are you? <div>Great Amazing</div>

To set conditions on certain answers, click the **Edit conditions** toggle.

Edit conditions

This feature allows you to route learners to specific questions based on their answers.

Click the (a) [Set Condition](#) link.

Select the (b) question to where the learner will skip.

Then, click the blue (c) **Save Condition** button.

3 Would you recommend this course to others? Multiple Choice

Yes [Set Condition](#) No [Set Condition](#)

Edit Condition

Question #3 Would you recommend this course to others?

If answer is Yes

Then skip to

None

Cancel

Save Condition

5 Advanced Evaluation Settings

To create custom messages that will appear to learners at the beginning or end of an evaluation, scroll to the **Advanced options** section of the Evaluation review page.

- >> To create a message learners will view at the start of an evaluation, click the **(a) Provide custom introductory text** button.
- >> To create a message learners will view at the end of an evaluation, click the **(b) Provide custom final text** button.
- >> Type the message in the **(c)** text box and click the blue **(d) Apply** button.

Advanced options

Provide custom introductory text **a**

Provide custom final text **b**

Introductory Text **c**

Attach a file

Cancel Apply **d**

Activate the Evaluation 6

Sample Evaluation

4 questions 0 courses Advanced options **Inactive** **a**

Anonymous Results No

Availability

Date range from May 5, 2024 8:00 AM to May 31, 2024 9:00 AM

Groups National

Created by Jane Doe (May 5, 2024)

Updated by Jane Doe (May 5, 2024)

Active

Inactive

Click the **Active** option from the dropdown menu at the top of the Evaluation details page.

! Learners cannot take an evaluation until it is activated.

Active **b**

7 Find and Edit Existing Evaluations

Type keywords into the **(a)** search bar on the Evaluation Management page. Then, click the **(b)** magnifying glass icon to view evaluation search results.

Evaluation Management

Add Evaluation

"Sample Evaluation" **a**

6 record(s) found. [Hide inactive](#) **b**

Name	Questions	Courses	Availability
Inactive Sample evaluation	10	1	National/Kentucky
from Jan 1, 2013			

Questions

Courses

Availability

10

1

National/Kentucky

Edit

Preview questions

Printable version

Clone

Activate

Delete

Click the **(c)** three-dot menu to view a dropdown list of action items. From here, you can **Edit** the evaluation, **Preview** evaluation questions, view a **Printable** version of the evaluation, **Clone** the evaluation, **Deactivate** or **Activate** the evaluation, or **Delete** the evaluation.

There are three avenues to add an evaluation to a course: **(1)** the Evaluation Details page, **(2)** the Course Search page, and **(3)** the Course Edit page.

1. Adding an Evaluation to a Course through the Evaluation Details page

Courses (0)

Assign to Course

Not tied to any course

(a) Scroll down to the Courses section and click the **Assign to Course** button.

Assign to course

Sample Evaluation

Course Assigned to 0 courses.

Select Course

Back Next

(b) Click the **Select Course** button.

 **TIP:** This method only works if the course has been approved.

(c) Type keywords into the search bar.

(d) Select a course to attach the evaluation.

(e) Click the green **Add course** button.

Add Courses

"rural health message"

Title	Organization
<input checked="" type="checkbox"/> Preparing a Strong Rural Health Message	Rural Health Rese...

Cancel Add 1 courses

Sample Evaluation

Type Evaluation Change

Course Assigned to 0 courses.

☒ Preparing a Strong Rural Health Message

Back Next

(f) To delete a selected course, click the red **X** button.

(g) Click the **Next** button.

(h) Select whether the evaluation is a pre-evaluation or post-evaluation. Select the **Mandatory** option if you want to require all learners to complete the course evaluation.

(i) Make any necessary additional requirement and availability setting selections under the **Type** section.

(j) Click the **Next** button.

Course Preparing a Strong Rural Health Message Change

Type

☐ Pre-Evaluation

☒ Evaluation

☐ Mandatory

Note: Evaluation that have a limited Availability Window cannot be made Mandatory

☐ Follow Up Evaluation

Days to postpone: days to postpone this Follow Up Evaluation from the day each learner completes the course

Availability window: days each learner will have to take this evaluation. Once this date period has passed, the evaluation will be removed from the learner's account

Back Next

Add an Evaluation to a Course (continued)

8

(k) Review the group availability. To add another group, click the **Add** button.

(l) Verify the Course and Type selections are correct.

(m) Click the green **Save** button.

2. Adding an Evaluation to a Course through the Course Search page

- (a) Search for a course.
- (b) Click the three-dot menu.
- (c) Select the **Evaluation** option from the dropdown menu.

(d) Click the **Assign Evaluation** button.

- (e) Type key words into the search bar.
- (f) Select an evaluation to attach the course.
- (g) To delete a selected evaluation, click the red **X** button.

(h) Click the **Next** button.

Add an Evaluation to a Course

8

Assign Evaluation

Advocacy

Web-based Training - Self-study

Evaluation Sample Evaluation [Change](#)

Credits [Select all](#) [Unselect all](#)

☐ Contact Hours

☒ None

[Back](#) [Next](#)

- (i) Select which credit type (if any) learners can earn from completing the course evaluation.
- (j) Click the **Next** button.

- (k) Select whether the evaluation is a pre-evaluation, standard evaluation, or follow-up evaluation.
- (l) Make any necessary additional requirement and availability setting selections under the **Type** section.

Assign Evaluation

Advocacy

Web-based Training - Self-study

Evaluation Sample Evaluation [Change](#)

Credits None [Change](#)

Type ☐ Pre-Evaluation ☒ Evaluation ☐ Mandatory

Note: Evaluation that have a limited Availability Window cannot be made Mandatory

☐ Follow Up Evaluation

Days to postpone: days to postpone this Follow Up Evaluation from the day each learner completes the course

Availability window: days each learner will have to take this evaluation. Once this date period has passed, the evaluation will be removed from the learner's account

Cancel [Save](#)

Assign Evaluation

Advocacy

Web-based Training - Self-study

Evaluation Sample Evaluation [Change](#)

Credits None [Change](#)

Type Evaluation [Change](#)

Availability Learners from these groups will be prompted to complete this Evaluation

National [Add](#) [X](#)

- (m) Review the group availability. To add another group, click the **Add** button.
- (n) Verify the Evaluation, Credit, and Type selections are correct.
- (o) Click the green **Save** button.

3. Adding an Evaluation to a Course through the Course Edit page

"public health foundation"

84 record(s) found.

Course x

[Cross Sector Collaboration: M](#)

[h Learning](#)

[n Health In](#)

[Collaborati](#)

[Department](#)

[August Announcements Demo](#)

- (a) Click the three-dot menu on the course search page.
- (b) Select the **Edit** option from the dropdown menu.
- (c) Select the **Assessments & Evaluations** section from the dashboard on the Course Edit page.

Assessments & Evaluations

Assessments & Evaluations

☐ Single Assessment / Evaluation

Only one Assessment and Evaluation of each type can be assigned to the course. Learners are allowed to select multiple credit types per registration.

☒ Multiple Assessment / Evaluation

Allow separate Assessments and Evaluations to be assigned to each credit type. Restricts learners to a single credit type per registration.

[Assessments](#) [Evaluations](#)

- (d) Select whether the evaluation is single or multiple.
 - **Single** - one evaluation will be used for all credit types and learners
 - **Multiple** - different evaluations can be used for varying credit types and learner groups
- (e) Click the **Evaluations** button. Then, follow steps **d-n** listed in the "Adding an Evaluation to a Course through the Course Search page" workflow above.