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**

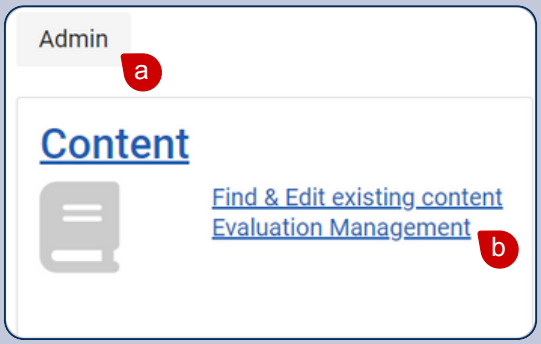
Table of Contents:

- **Navigate to Evaluation Management 2**
- **Create an Evaluation 2**
- **Add Questions to an Evaluation 3**
- **Additional Question Setting Options 4**
- **Advanced Evaluation Settings 6**
- **Activate the Evaluation 6**
- **Find and Edit Existing Evaluations 6**
- **Add an Evaluation to a Course 7**
  - **Adding an Evaluation to a Course through the Evaluation Details page 7**
  - **Adding an Evaluation to a Course through the Course Search page 8**
  - **Adding an Evaluation to a Course through the Course Edit page 9**

TRAIN
From the Public Health Foundation

1 Navigate to Evaluation Management

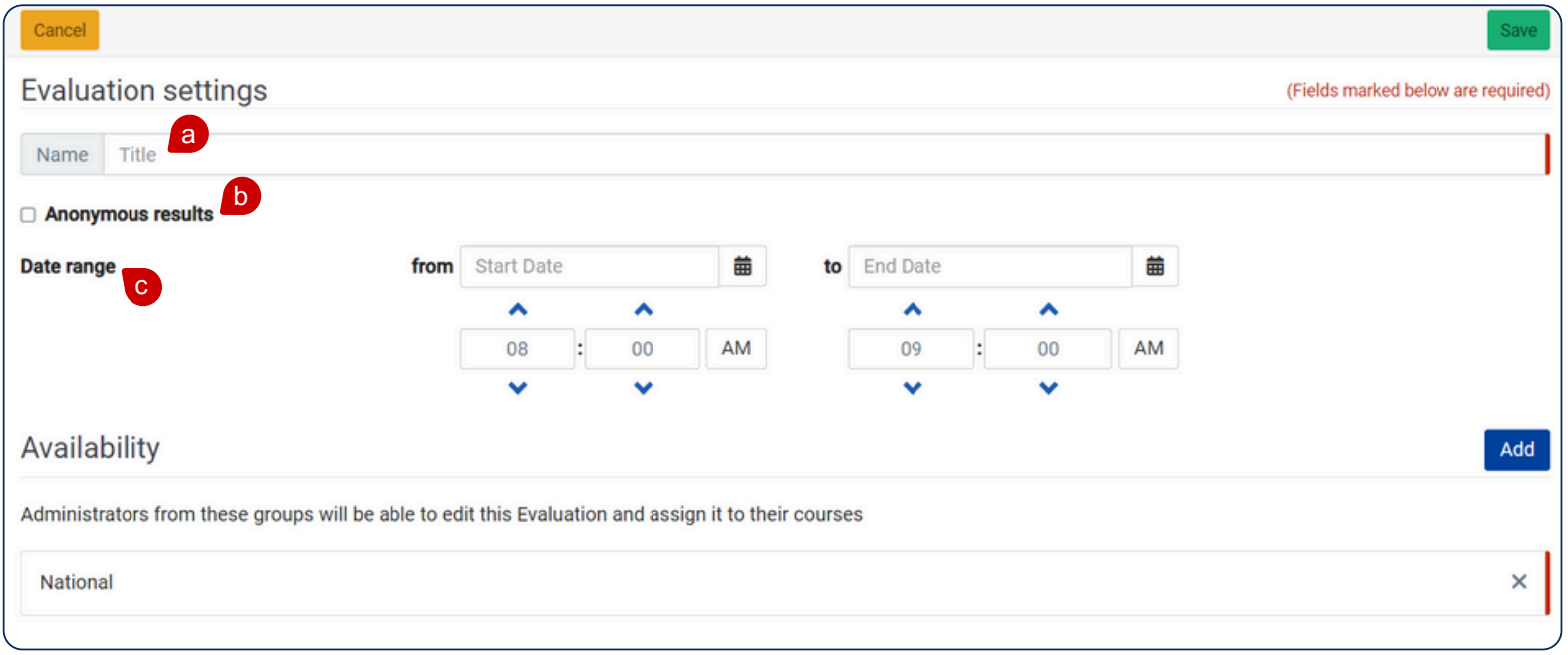
Go to the **(a) Admin** menu. Click the **(b) Evaluation Management** link under the **Content** tile.



2 Create an Evaluation



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



(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.

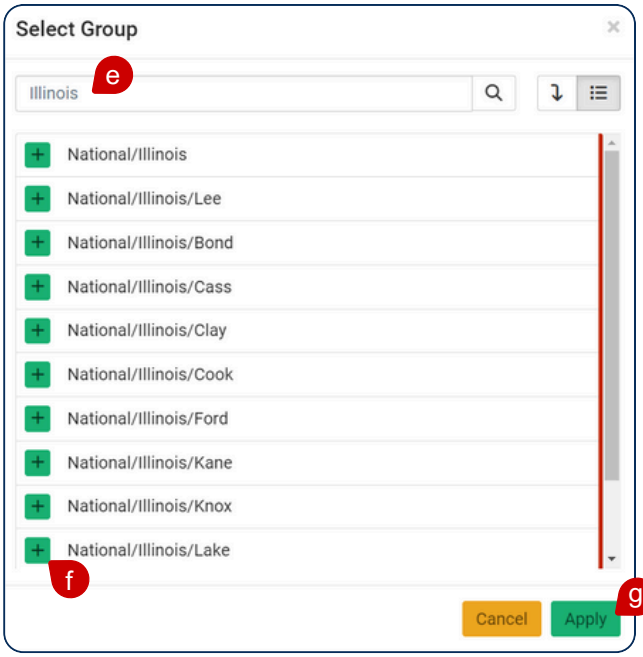
TIP: Required fields are marked with a red bar.

TRAIN
From the Public Health Foundation

2 Create an Evaluation (continued)

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





(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.

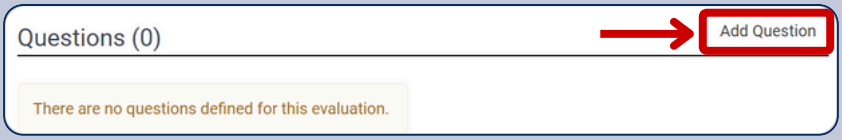
(g) Click the green **Apply** button to ensure the selected group has access to the evaluation.

(h) Click the **X** button to remove a group's access to the evaluation.

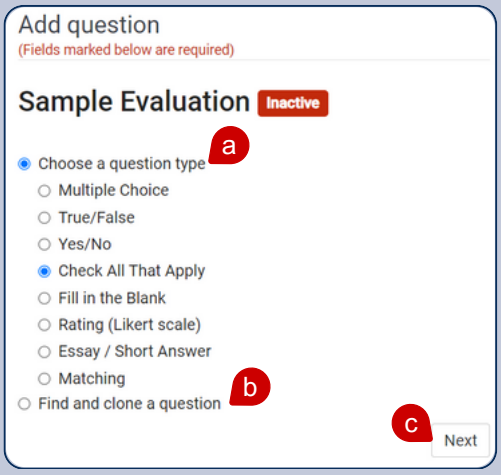
Once you have filled in the required information, remember to click the green **Save** button in the upper right corner of the Evaluation Settings page.



3 Add Questions to an Evaluation



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



(a) Select a question type for your evaluation.

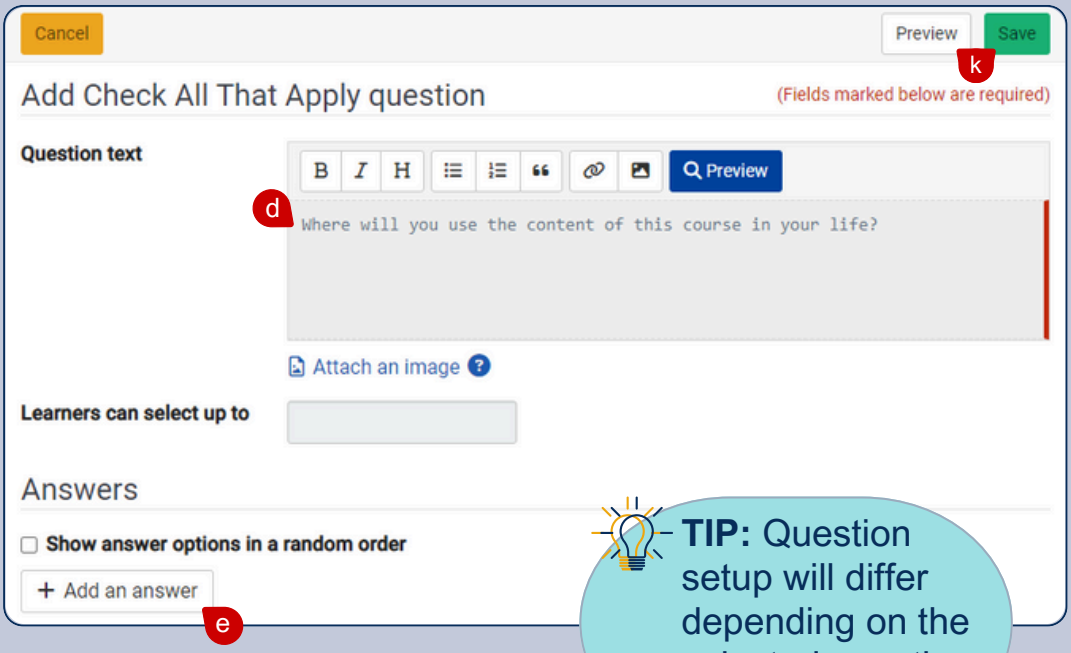
(b) To copy a question from an existing evaluation, click the **Find and Clone a question** button.

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

TRAIN From the Public Health Foundation

3 Add Questions to an Evaluation (continued)

Fill in the required evaluation question details.



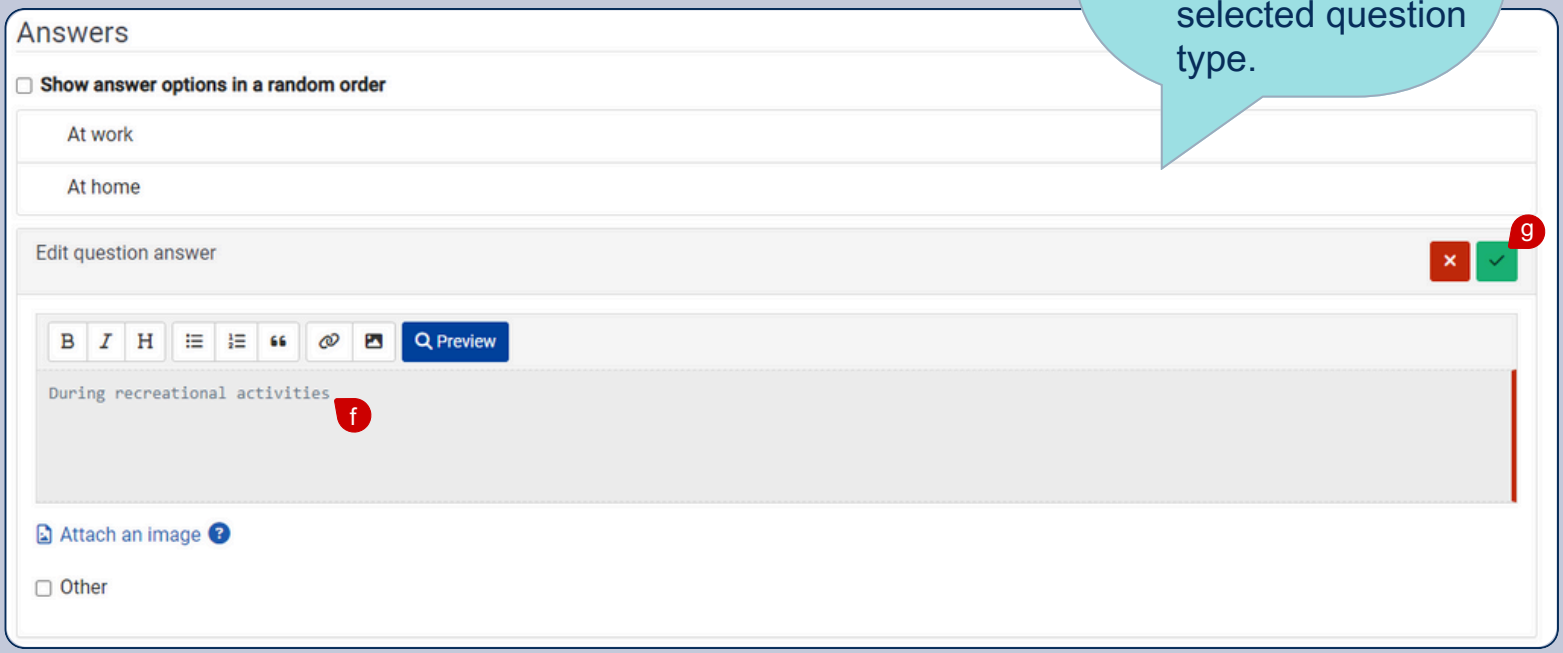
(d) Enter your question text here.

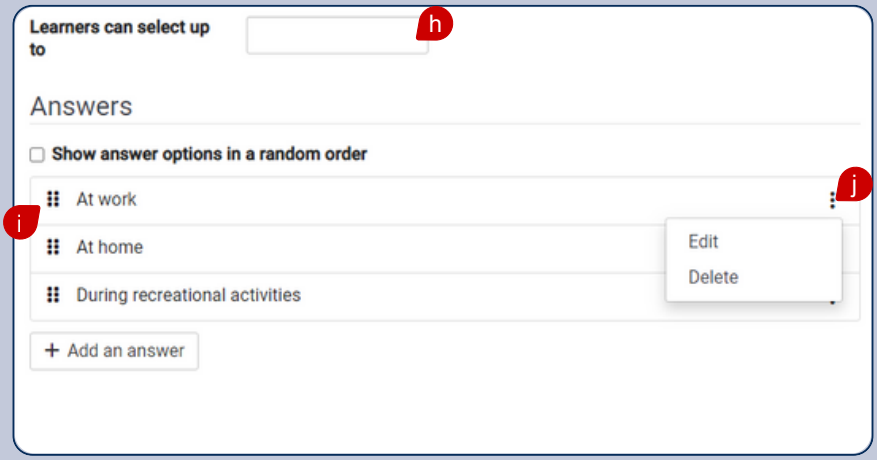
(e) Click the **Add an answer** button.

(f) Type your question answers here.

(g) Select the green check button to save your answer.

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





(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.

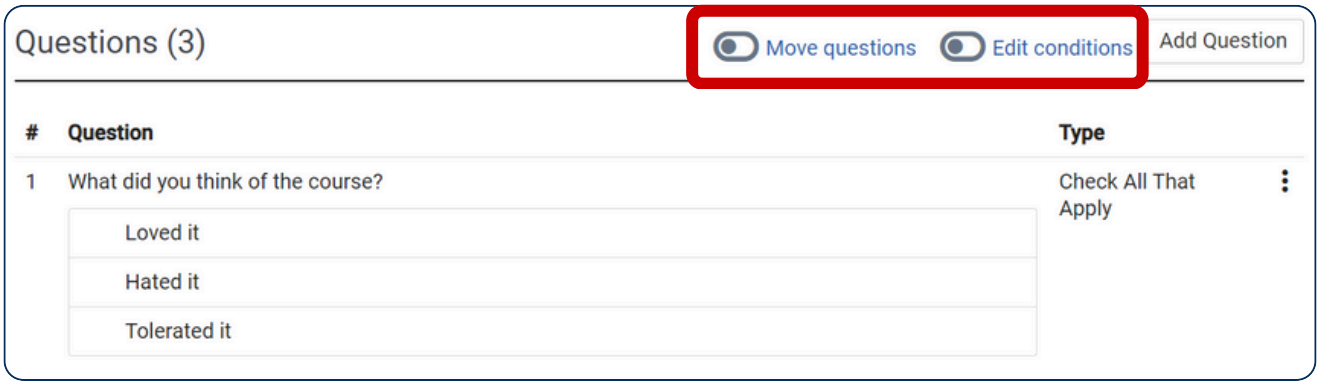
(k) Click the **Preview** button to view how your question will look to learners, then click the green **Save** button.

TRAIN From the Public Health Foundation

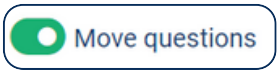
Additional Question Setting Options

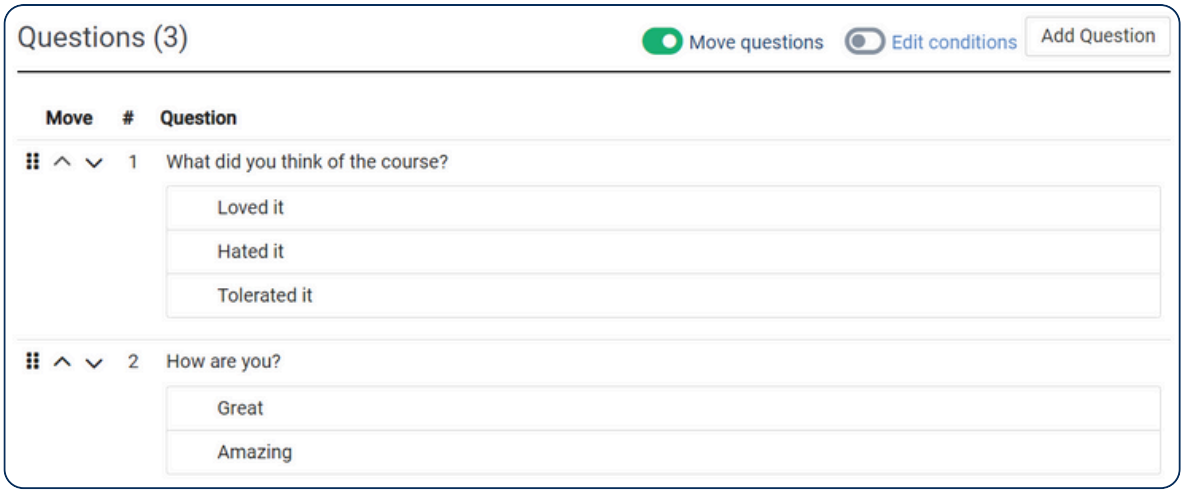
4

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

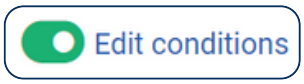


To rearrange the order of questions, click the **Move questions** toggle. Use the arrows to adjust the question sequence.



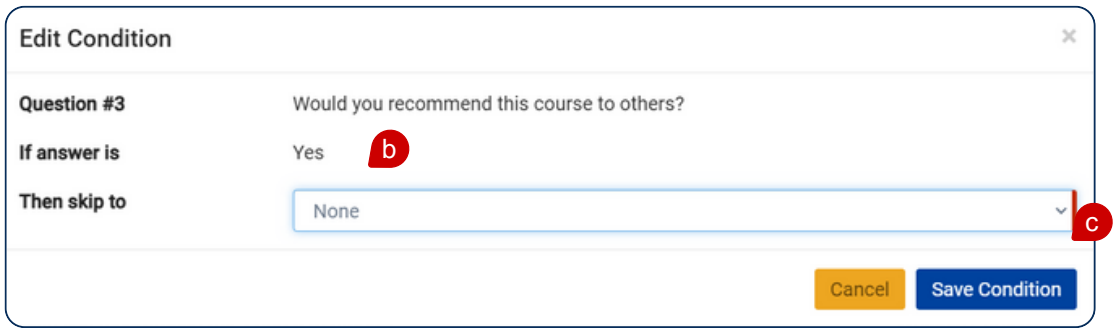


To set conditions on certain answers, click the **Edit conditions** toggle.



This feature allows you to route learners to specific questions based on their answers when using the true/false and multiple choice question types. This routing is not available when using other question types.





To route:

Click the **(a)** Set Condition link.

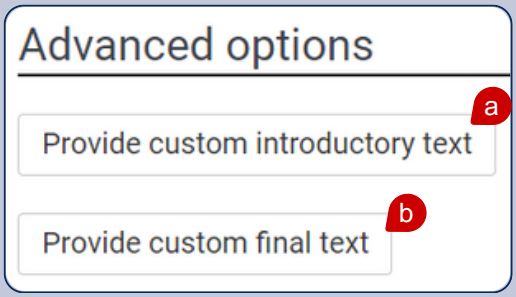
Select the **(b)** question to where the learner will skip.

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

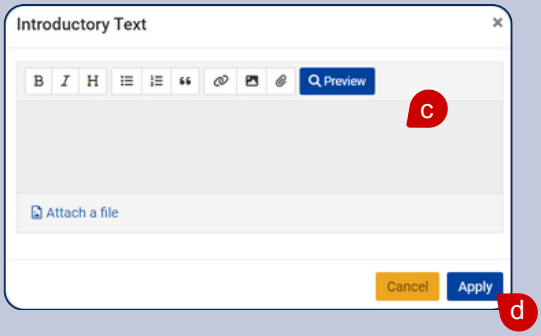
TRAIN
From the Public Health Foundation

5 Advanced Evaluation Settings

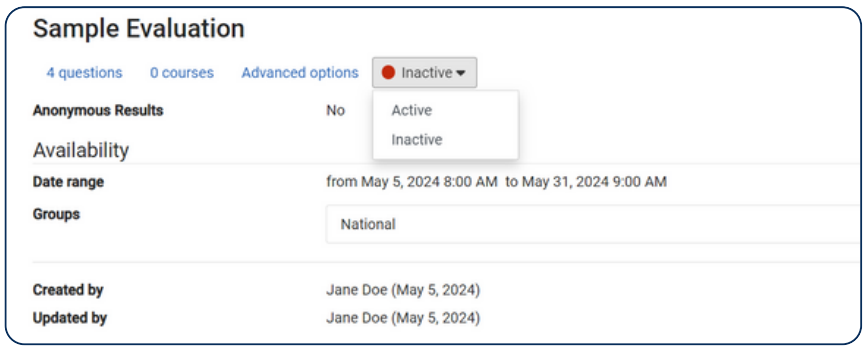
To create custom messages that will appear to learners at the beginning or end of an evaluation, scroll to the **Advanced options** section of the Evaluation review page.



- 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.



6 Activate the Evaluation



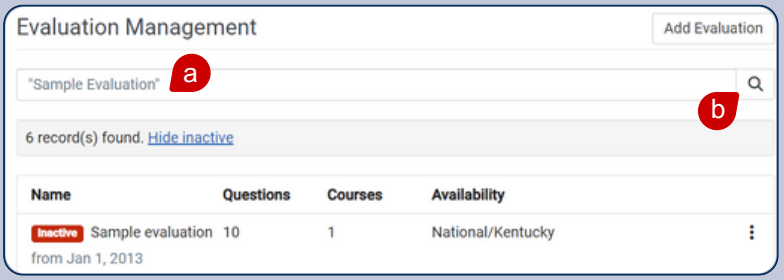
Click the **Active** option from the dropdown menu at the top of the Evaluation details page.

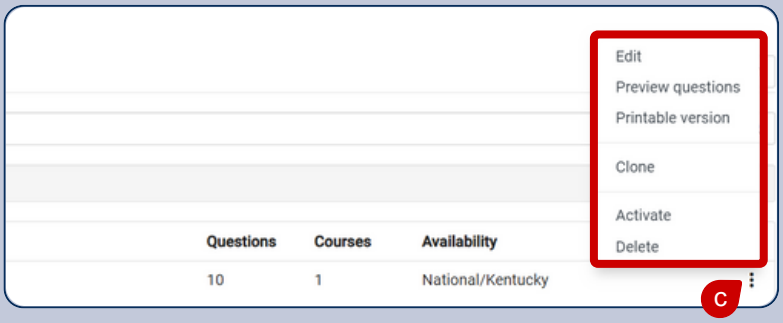
Learners cannot take an evaluation until it is activated.



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.





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.

TRAIN
From the Public Health Foundation

Add an Evaluation to a Course

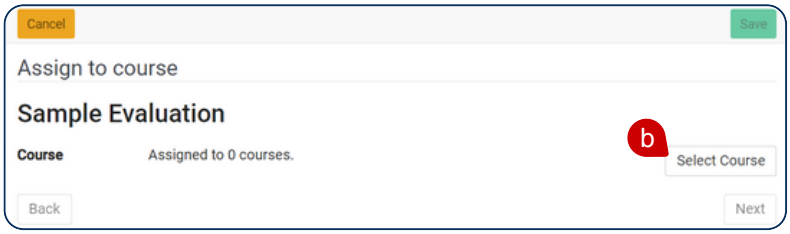
8

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



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

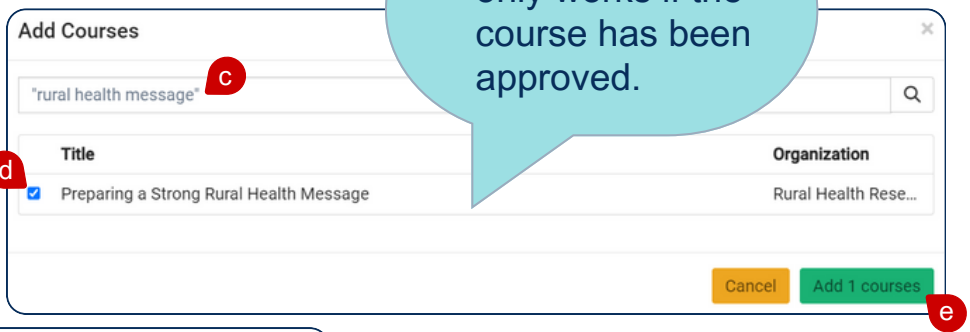


(b) Click the **Select Course** button.

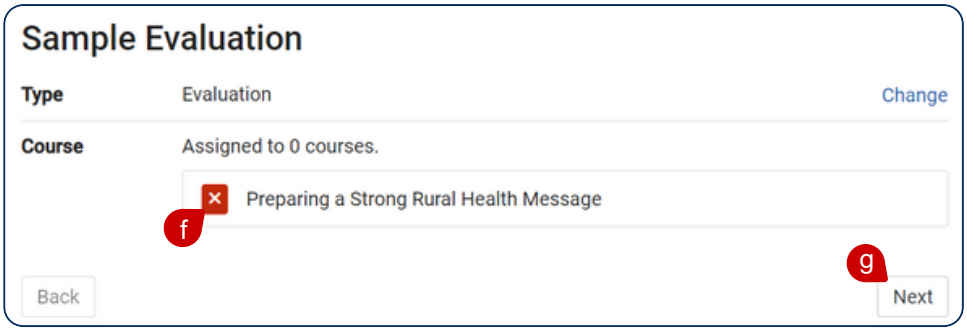
(c) Type keywords into the search bar.

(d) Select a course to attach the evaluation.

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

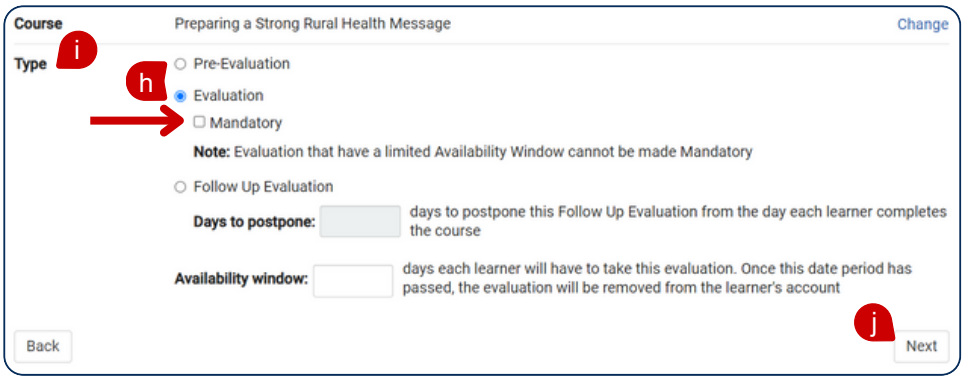


TIP: This method only works if the course has been approved.



(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.

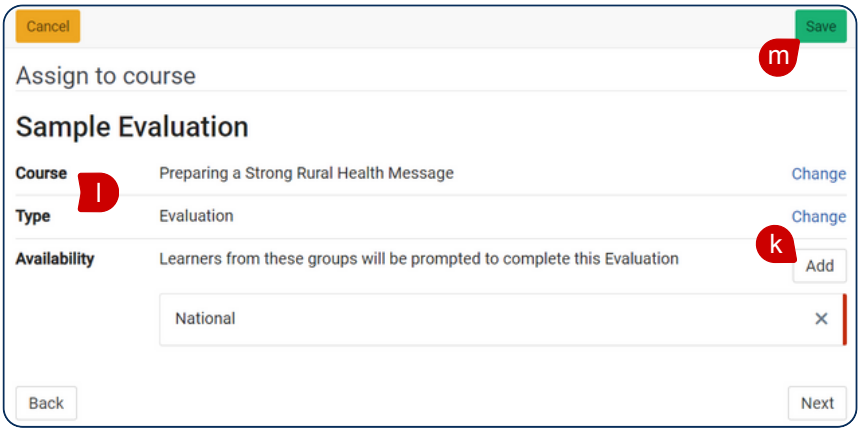
TRAIN
From the Public Health Foundation

8 Add an Evaluation to a Course (continued)

(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

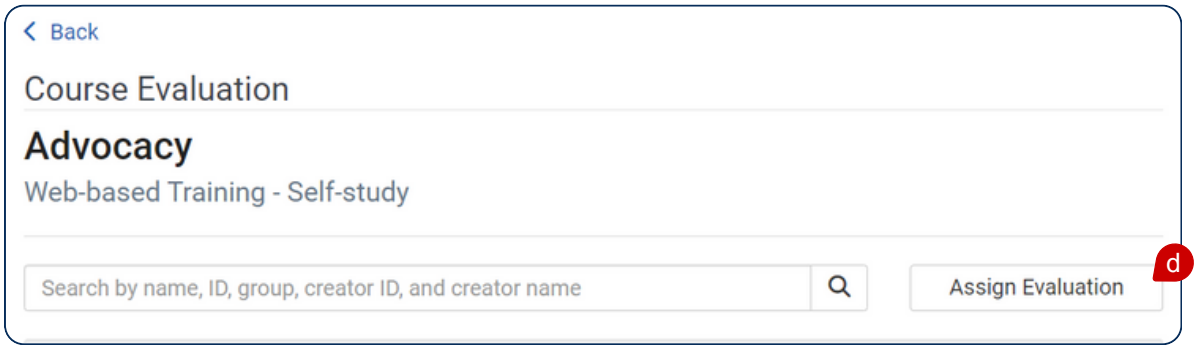


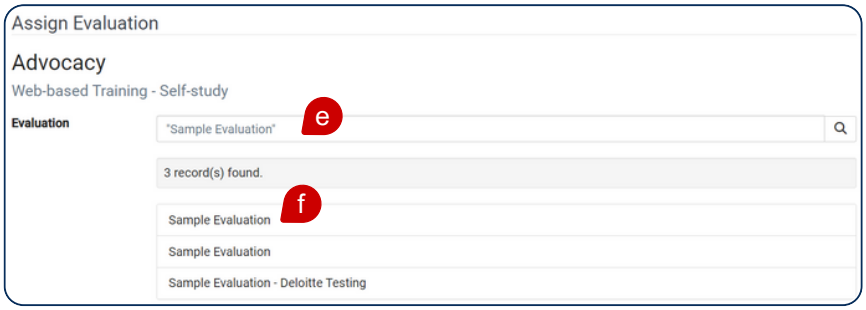
(a) Search for a course.

(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.

TRAIN
From the Public Health Foundation

Add an Evaluation to a Course

8

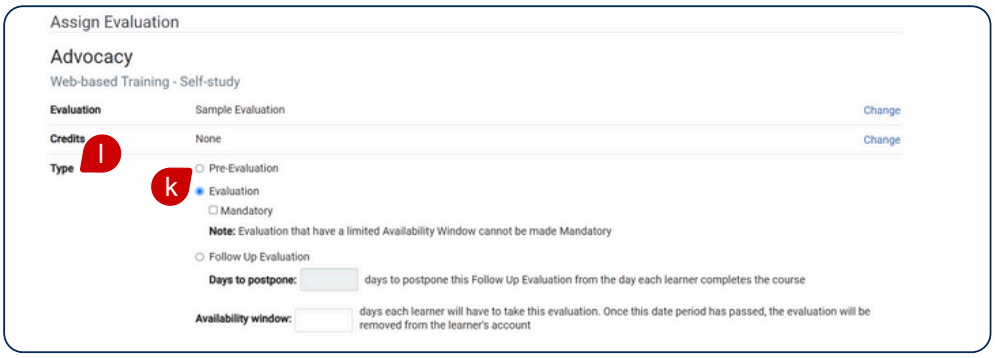


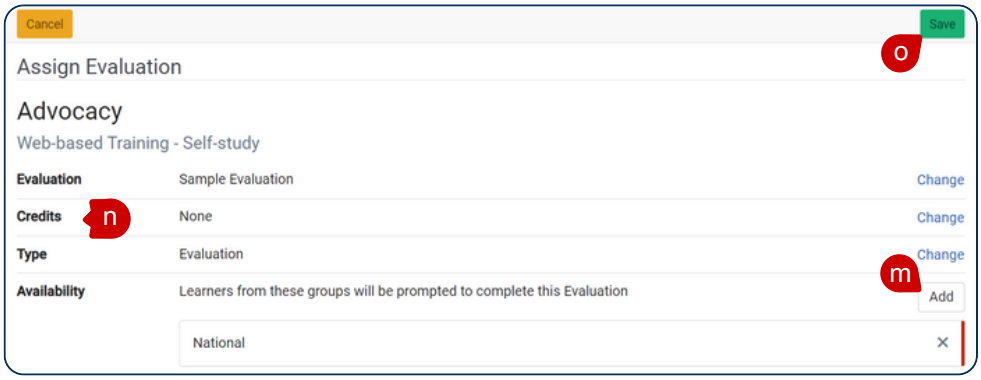
(i) Select which credit type (if any) learners can earn from completing the course evaluation.

(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.



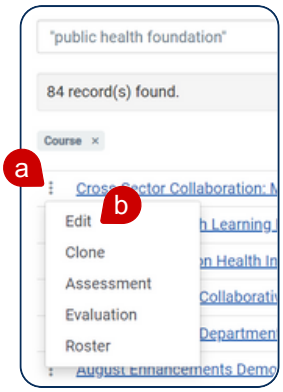


(m) Review the group availability. To add another group, click the **Add** button.

(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

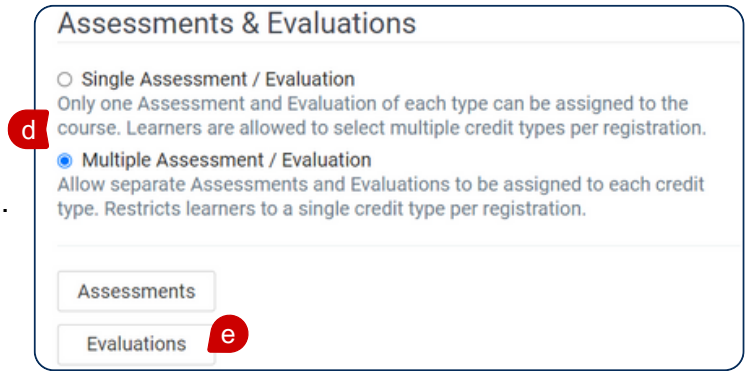


(a) Click the three-dot menu on the course search page.

(b) Select the **Edit** option from the dropdown menu.

(c) Select the **Assessments & Evaluations** section from the dashboard on the Course Edit page.





(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.

TRAIN
From the Public Health Foundation