Evaluation Management &Reporting

1. Create a New Evaluation

- Log in at https://www.train.org/
- Go to Home
- Go to Admin / Content page
- Click on the Evaluation Management tile. This tile is available to admins with the Evaluation Manager Role and Course Providers.
- Find the Add Evaluation button on the right side of the page.
  When clicked, it will open a blank Evaluation Settings page
- Type an Evaluation Name
- Checkmark Anonymous Results to hide the learner's information who participate in the evaluation. It will be unchecked by default and will not track the learner's information who participated in the evaluation.
- Set a Date range for the evaluation to be available for the learners. Evaluation is accessible until the specified time of the specified date.
  - Start Date
  - End Date
- Set Availability for the evaluation to be available for groups.
- Click on Add Group. Select Group pop-up window will open and present a Tree View. A search bar allows you to search for any group. More than one group can be added. A group selector will be shown by default with the logged-in admin's groups.
- Click on Save. New Evaluations will be created as inactive by default. Remember to click on Activate button on the right side of the edit evaluation page to activate the Evaluation. An evaluation cannot be activated if there are no questions.

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2. Edit Evaluation

- Find Evaluation Name at the lists of evaluations. Admins with the Course Provider role will see all Evaluations on the list that their role assignment allows but will be able to edit only evaluations that they have created. For all other Evaluations on the list, only the Preview and Clone actions will be available. Admins with the Evaluation Manager role only see Evaluations available to them via the role assignment and will have access to all actions.

To Edit, Preview, Clone, Deactivate, and Delete evaluation:

- Click on the three-dot menu icon on the right side of the evaluation list.
- Click on Edit. It will open the Edit Evaluation setting page. "Edit" action will be available to Course Providers who created the Evaluation and to Evaluation Managers who have the role on the Evaluation's group or higher.
- Click on Preview. It will open a pop-up where all evaluation questions will be shown on one page and all possible answers listed and indicators of correct answers.

- Click on Clone. It will open the Edit Evaluation page for a new evaluation that will be created as a copy of the selected Evaluation, including all fields, questions, and settings, except for Visibility and Course Evaluation.
- Click on Deactivate. Clicking on this option will make the selected item Inactive.
- Click on Delete. Delete action should be available to Course Providers who created the Evaluation and the Evaluation Managers.
- Clicking on Edit will open the Edit Evaluation Setting page. Clicking the row will also initiate the Edit action. The main part of the page is organized into sections***(Questions, Courses, Settings, and Advanced options)*** shown one after another on the same page. Sections' names are displayed as tabs at the top of the page. Clicking on a section name will scroll the page to the selected section.

Question Section:

- Click on Questions under the question section. The list shows an Add Question button on the right-hand side of the page. The number of added questions will be displayed in parentheses after the section name on clicking this button. The list of Questions added to the Evaluation will be shown. There is a three-dot action menu next to each item with Edit, Clone, and Delete options.
- Click on Edit (as well as the whole row click) will redirect to the Edit Question page for this question
- Click on Clone to create a copy of the selected question and redirect it to the Edit Question page.
- Click on Delete will remove the question after a confirmation message.

To add a question:

- Click on Add Question button on the right-hand side of the page. Choose a question type from Choose question type and find and clone question option. There will be Cancel, Preview, and Save Question action buttons on the top of the page for all question types.
- Click on Cancel to remove the question after confirmation.
- Click on Preview to show a pop-up window of how the question looks to users.
- Click on Save, and it will save the questions and answers for that question type.
- Click on Find and Clone a Question. It will exit back to the Edit Evaluation page, Questions section, where a list of existing questions is shown with a Clone action.

To add skip pattern logic to the question:

- Click on Edit condition. Only questions of "True/False" or "Multiple Choice" types will have this option available. If there is already a condition added for an answer, the condition will be shown as a clickable link. Underneath show the "then skip to the question #" selector as a drop-down list that will show a list with numbers of questions plus a "No condition" option on the top (default option)
- Click on the "Save condition" action button to close. There will be validators that will prohibit setting up conditions that introduce "infinite loops," such as redirecting to the

same question again. Unchecking the "Edit Conditions" checkbox will switch back to the normal mode.

Note: When an Evaluation is presented to end-users, if there are any Conditions added to its answer options, the Condition rule should overrule the question order defined in the Evaluation settings (defined, random, etc.) and after the answer option from the Condition is detected, the next question presented to the user should be the question from the rule.

To add Move Question Condition to the question:

- Click on the move question. When the option is selected, the Questions list will be shown in the Move mode. The existing columns will be hidden except for the "#" and "Name." The first column will have drag-n-drop icons for each question that easily allow moving questions within the same page. The second column will have Up and Down arrows that will provide a way to move questions between pages if needed.
- Changes will be saved instantly. If there are any "Conditions" set for questions, a check will prohibit moving questions to the order that introduces any "infinite loops," such as redirecting to the same question again.

Course Section:

- Click on Courses. The total number of assigned courses (active, inactive, expired, and unexpired) will be shown in parentheses. There will be a three-dot action menu next to each item with Edit and Unassign options. Clicking on "Edit" will redirect to assign to the Course page and present with edit options.
- Click on Assign to a course.
- Search for a course or enter a course ID. The search bar will search all courses available to you by Course Name or Course ID. Admins with the Evaluation Manager role will see the courses available to them via the role assignment (assigned to the same group or below the group they have the role for).
- Click Next to go to the next Wizard step after selecting a course
- Click on Credits selection (If applicable). This step will be shown only if the selected course has any Credits assigned. Show "Credits" checkbox list plus a "Select all" link. Selection of at least one Credit type is required.
- Click on Evaluation Type to choose available Evaluation Types:
    - Pre-evaluation
    - Initial Evaluation
    - Follow Up Evaluation
- Click on Add group to set Availability. A group selector with the logged-in admin's groups added to the list will be shown by default.
- Click on Save.

To Un-assign an evaluation to a course:

- Click on un-assign from the three-dot action menu
- Click Remove to confirm

Setting Section:

- Click on Settings. Evaluation settings are shown in a "Read-only" mode by default, with a possibility of editing by clicking the Edit Settings button that will open the Edit Evaluation Settings page.

Advanced Option Section:

- Click on Advanced Options. This section contains two selections that will open editable fields (by default, both texts will be empty)
- Click on Provide custom introductory text to add text that will be displayed to the learner before the assessment starts. It is an optional field.
- Click on Provide custom final text to add text that will be displayed to the learner after the assessment is completed. It is an optional field.
- Click on Apply.

Evaluation Results Report

1. Create a new Evaluation Results Report

- Log in at https://www.train.org/
- Go to Admin
- Click on Reports
- Click on Reports (View and run saved reports)
- Click on Evaluation Results (Evaluation Results for selected courses). Evaluation result reports will be available to admins with the Report Manager and Course Provider roles. Report Managers will be able to run it for courses that are assigned to the group and below where the role is assigned. Course Providers will be able to run it for courses that they have a right to edit.
- Click on Add a new report. It will open the Edit report page.
- Create a Report title or leave the report titled "Evaluation Results."
- Choose a Date range for the Evaluation result report—the date range will filter report output by the "Completion Date" of Evaluation records.
    - Fixed date (Start date and end date)
    - Last week
    - Last month
- Click on the Report schedule drop-down to set automatic weekly or monthly Evaluation result report delivery. Select none if the report schedule is not needed.
- Select summary view or participants view for desired report mode.
- Click on search course by course ID or Course name on the right-hand side under the course section to search for courses.
- Select course by clicking on the green add(+) a sign on the left-hand side. Selected courses can be removed by clicking on the red (x) icon in front of the selected course

name. Course selection is required. Multiple courses can be selected. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.

- Search for an Evaluation by Evaluation ID or Evaluation name under the Evaluation section of the page. Evaluations available for the course will be presented by default after selecting the course. Multiple evaluations can be selected.
- Click on the green add(+) icon to select Evaluation. Selected Evaluation can be removed by clicking on the red(x) icon in front of the Evaluation name. Evaluation selection is required. Only one Evaluation can be selected for the report.
- Click on Advanced Options to expand the group selection options for Evaluation results.
- Search by group name or group id to add groups. A group selector will be shown by default with the logged-in admin's groups.
- Click on tree view options to expand and view the group's full structure
- Select a group by clicking on the green add(+) icon in front of group names. Groups can be removed from selection by clicking on the red remove (x) icon in front of the group name after the selection.
- Select reporting setting choice from the list if applicable
    - Include administrators (checked by default)
    - Include inactive (closed) user accounts (unchecked by default)
- Click on Save to generate the Evaluation result report. Saving all the entered report selections will create an Evaluation result report.
- Click on the download icon to download the report.
- Click on Refresh to refresh the report status and download again. Evaluation Name and Evaluation Type info will be presented in the report. The downloaded Evaluation result report will be presented in excel format.

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2. Creating Evaluation results on the course edit page

- Got to Admin
- Click on Content
- Click on Find and edit existing content
- Search for course by course ID or course name
- Select course
- Click on Edit on the right-hand side
- Click on roster
- Click on sessions
- Go to tools drop-down
- Click on Evaluation results from the tools drop-down. Clicking on the Evaluation result report will direct to the edit report page
- Choose a Date range for the Evaluation result report—the date range will filter report output by the completion date of Evaluation records.
    - Fixed date (Start date and end date)
    - Last week

    - Last month

- Click on the report schedule drop-down to set automatic weekly or monthly Evaluation result report delivery. Select none if the report schedule is not needed.
- Select Summary View or Participants View for desired report mode.
- Click on search course by course ID or Course name on the right-hand side under the course section to search for courses.
- Select course by clicking on the green add(+) icon on the left-hand side. Selected courses can be removed by clicking on the red remove (x) icon in front of the chosen course name. Course selection is required. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.
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- Click on the green add(+) icon to select Evaluation. Selected Evaluation can be removed by clicking on the red(x) icon in front of the Evaluation name. Evaluation selection is required. Multiple evaluations can be selected for the report.
- Click on Advanced Options to expand the group selection options for Evaluation results.
- Search by group name or group id to add groups. There will be groups listed underneath the search bar by default logged-in admin's group structure.
- Click on Tree view options to expand and view the group's full structure
- Select a group by clicking on the green add(+) icon in front of group names. Groups can be removed from selection by clicking on the red remove(x) icon in front of the group name after the selection.
- Select reporting setting choice if applicable
    - Include administrators (checked by default)
    - Include inactive (closed) user accounts (unchecked by default)
- Click on Generate a report to create the Evaluation result report. Saving the selections will generate an Evaluation result report. If the pop-up window is closed, the generated report will be discarded. New Evaluation results click will generate a new instance of the report.
- Click on Refresh to refresh the report status and download again. Evaluation Name and Evaluation Type info will be presented in the report. The downloaded file will be in excel format.

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3. Edit Evaluation Results Report

- Go to Admin
- Click on Reports
- Click on Reports (View and run saved reports)
- Click on Evaluation Results (Evaluation Results for selected courses)

- Click on the pencil icon in front of the report title. It will open the edit report page where all the selected report parameters can be edited to create a new report.
- Click on Save after making an edit to the existing report selection
- Click on Save to generate the report.
- Click on the download icon to download the report.
- Click on Refresh to refresh the generated status of the report.
- Click on the Download to download the report again.

Evaluation Results Report (Raw Data)

1.Create a new Evaluation Results Report

- Log in at https://www.train.org/
- Go to Admin
- Click on Reports
- Click on Reports (View and run saved reports)
- Click on Evaluation Results (Evaluation Results for selected courses). Evaluation results reports will be available to admins with the Report Manager and Course Provider roles. Report Manager should be able to run it for courses that are assigned to the group and below where the role is assigned. Course Providers should be able to run it for courses that they have a right to edit.
- Click on Add a new report. It will open the Edit report page.
- Create a Report title or leave the report titled "Evaluation Results."
- Choose a Date range for the Evaluation result report—the date range will filter report output by the "Completion Date" of Evaluation records.
    - Fixed date (Start date and end date)
    - Last week
    - Last month
- Click on the Report schedule drop-down to set automatic weekly or monthly Evaluation result report delivery. Select none if the report schedule is not needed.
- Select summary view or participants view for desired report mode.
- Click on search course by course ID or Course name on the right-hand side under the course section to search for courses.
- Select course by clicking on the green add(+) a sign on the left-hand side. Selected courses can be removed by clicking on the red (x) icon in front of the selected course name. Course selection is required. Only one course can be selected. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.
- Search for an Evaluation by Evaluation ID or Evaluation name under the Evaluation section of the page. Evaluations available for the course will be presented by default after

selecting the course. Evaluation selection is required. Only one evaluation can be selected.

- Click on the green add(+) icon to select Evaluation. Selected Evaluation can be removed by clicking on the red(x) icon in front of the Evaluation name. Evaluation selection is required. Only one Evaluation can be selected for the report.
- Click on Advanced Options to expand the group selection options for Evaluation results.
- Search by group name or group id to add groups. A group selector will be shown by default with the logged-in admin's groups.
- Click on Tree view options to expand and view the roup's full structure
- Select group by clicking on the green add(+) icon in front of group names. Groups can be removed from selection by clicking on the red remove(x) icon in front of the group name after the selection.
- Select reporting setting choice from the list if applicable
    - Include administrators (checked by default)
    - Include inactive (closed) user accounts (unchecked by default)
- Click on Save to generate the Evaluation result report. Saving all the entered report selections will create an Evaluation result report.
- Click on the Download icon to download the report.
- Click on Refresh to refresh the report status and download again. Evaluation Name and Evaluation Type info will be presented in the report. The downloaded Evaluation result report will be presented in excel format.

2.Creating Evaluation results on the course edit page

- Got to Admin
- Click on Content
- Click on Find and edit existing content
- Search for course by course ID or course name
- Select course
- Click on Edit on the right-hand side
- Click on Roster
- Click on sessions
- Go to the Tools drop-down
- Click on Evaluation results from the tools drop-down. Clicking on the Evaluation result report will direct to the edit report page and
- Choose a Date range for the Evaluation result report—the date range will filter report output by the completion date of Evaluation records.
    - Fixed date (Start date and end date)
    - Last week
    - Last month

- Click on the report schedule drop-down to set automatic weekly or monthly Evaluation result report delivery. Select none if the report schedule is not needed.
- Select summary view or participants view for desired report mode.
- Click on search course by course ID or Course name on the right-hand side under the course section to search for courses.
- Select course by clicking on the green add(+) icon on the left-hand side. Selected courses can be removed by clicking on the red remove(x) icon in front of the chosen course name. Course selection is required. The search bar shows courses available to the admin via the Report Manager or Course Provider roles.
- Search for an evaluation by Evaluation ID or Evaluation name under the Evaluation section of the page. Evaluations available for the course will be presented by default after selecting the course.
- Click on the green add(+) icon to select Evaluation. Selected Evaluation can be removed by clicking on the red(x) icon in front of the Evaluation name. Evaluation selection is required. Multiple evaluations can be selected for the report.
- Click on advanced options to expand the group selection options for Evaluation results.
- Search by group name or group id to add groups. There will be groups listed underneath the search bar by default logged-in admin's group structure.
- Click on Tree view options to expand and view the group's full structure
- Select a group by clicking on the green add(+) icon in front of group names. Groups can be removed from selection by clicking on the red remove (x) icon in front of the group name after the selection.
- Select reporting setting choice if applicable
    - Include administrators (checked by default)
    - Include inactive (closed) user accounts (unchecked by default)
- Click generate a report to create the Evaluation results report. Saving the selections will generate an Evaluation result report. If the pop-up window is closed, the generated report will be discarded. New Evaluation results click will generate a new instance of the report.
- Click on Refresh to refresh the report status and download again. Evaluation Name and Evaluation Type info will be presented in the report. The downloaded file will be in excel format.

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3. Edit Evaluation Results Report

- Go to Admin
- Click on Reports
- Click on Reports (View and run saved reports)
- Click on Evaluation Results (Evaluation Results for selected courses)
- Click on the pencil icon in front of the report title. It will open the edit report page where all the selected report parameters can be edited to create a new report.
- Click on Save after making an edit to the existing report selection

- Click on Save to generate the report.
- Click on the Download icon to download the report.
- Click on Refresh to refresh the generated status of the report.
- Click on the Download to download the report again.