Evaluation Reporting

Purpose: This job aid details how Administrators with the Report Manager role and Course Providers can create evaluation results reports.

Access:
- Administrators with the Report Manager role for courses assigned to a group below their role in the organization's grouping structure.
- Course Providers are able to run reports for courses they have rights to edit.

Related Functionality:
- All functionalities related to creating evaluation results reports.

Evaluation Results Report

Create a new Evaluation Results Report

1) Log in at https://www.train.org/
2) Go to Admin.
3) Click on Reports.
4) Click on Reports (View and run saved reports).
5) Click on Evaluation Results (Evaluation Results for selected courses).
6) Click on Add a new report. It will open the Edit report page.
7) Create a Report title, or leave the report titled "Evaluation Results."
8) Choose a Date range for the Evaluation result report—the date range will filter report output by the completion date of Evaluation records.
   a) Fixed date (Start date and end date).
   b) Last week.
   c) Last month.
9) 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.
10) Select summary view or participants view for desired report mode.
11) Click on search course by course ID or course name on the right-hand side under the course section to search for courses.
12) 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 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.

13) Search for an evaluation by ID number 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.

14) Click on the green add (+) icon to select Evaluation. Evaluation selection is required. The selected evaluation can be removed by clicking on the red remove (x) icon in front of the evaluation name.

15) Click on Advanced Options to expand the group selection options for Evaluation results.

16) Search by learner group name to add learner groups. A group selector will be shown by default with the logged-in admin's groups.

17) Click on the tree view option to expand and view the group's full structure.

18) 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.

19) Select reporting setting choice from the list, if applicable.
   a) Include administrators (checked by default).
   b) Include inactive (closed) user accounts (unchecked by default).

20) Click on Save to generate the Evaluation result report. Saving all the entered report selections will create an Evaluation result report.

21) Click on the download icon to download the report.

22) 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.

Creating Evaluation Results on the Course Edit Page:

1) Go to Admin.
2) Click on Content.
3) Click on Find and Edit existing content.
4) Search for a course by its ID number or course name.
5) Select course.
6) Click on Edit on the right-hand side.
7) Click on roster.
8) For live events, click on sessions.
9) Go to tools drop-down.
10) Click on Evaluation results from the tools drop-down. Clicking on the Evaluation result report will direct to the edit report page.

11) Choose a Date range for the Evaluation result report—the date range will filter report output by the completion date of Evaluation records.
   a) Fixed date (Start date and end date).
   b) Last week.
   c) Last month.
12) 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.
13) Select Summary View or Participants View for desired report mode.
14) Click on search course by course ID or course name on the right-hand side under the course section to search for courses.
15) Select course by clicking on the green add (+) icon on the left-hand side. Course selection is required. Selected courses can be removed by clicking on the red remove (x) icon in front of the selected course name. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.
16) Search for an evaluation by its ID number or evaluation name under the Evaluation section of the page. Evaluations available for the course will be presented by default after selecting the course.
17) Click on the green add (+) icon to select the evaluation. Evaluation selection is required. Multiple evaluations can be selected for the report. The selected evaluation can be removed by clicking on the red remove (x) icon in front of the Evaluation name.
18) Click on Advanced Options to expand the group selection options for Evaluation results.
19) Search by learner group name or group id to add learner groups. There will be learner groups listed underneath the search bar by default logged-in admin's group structure.
20) Click on the tree view option to expand and view the group's full structure.
21) 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.
22) Select reporting setting choice, if applicable.
   a) Include administrators (checked by default).
   b) Include inactive (closed) user accounts (unchecked by default).
23) 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.

24) 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.

Edit Evaluation Results Report:

1) Go to Admin.
2) Click on Reports.
3) Click on Reports (View and run saved reports).
4) Click on Evaluation Results (Evaluation Results for selected courses).
5) 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 in order to create a new report.
6) Click on Save after making an edit to the existing report selection.
7) Click on Save to generate the report.
8) Click on the download icon to download the report.
9) Click on Refresh to refresh the generated status of the report.
10) Click on the Download to download the report again.

Evaluation Results Report (Raw Data)

Create a New Evaluation Results Report:

1) Log in at https://www.train.org/
2) Go to Admin.
3) Click on Reports.
4) Click on Reports (View and run saved reports).
5) 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.
6) Click on Add a new report. It will open the Edit report page.
7) Create a Report title or leave the report titled Evaluation Results.
8) Choose a Date range for the Evaluation result report—the date range will filter report output by the "Completion Date" of Evaluation records.
    a) Fixed date (Start date and end date).
    b) Last week.
    c) Last month.

9) 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.
10) Select summary view or participants view for desired report mode.
11) Click on search course by course ID or course name on the right-hand side under the course section to search for courses.
12) Select course by clicking on the green add (+) sign on the left-hand side. Course selection is required. Multiple courses can be selected. Selected courses can be removed by clicking on the red (x) icon in front of the selected course name. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.
13) Search for an evaluation by ID number 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.
14) 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.
15) Click on Advanced Options to expand the group selection options for Evaluation results.
16) Search by learner group name or group id to add learner groups. A group selector will be shown by default with the logged-in admin's groups.
17) Click on tree view options to expand and view the group's full structure
18) 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.
19) Select reporting setting choice from the list if applicable.
    a) Include administrators (checked by default).
    b) Include inactive (closed) user accounts (unchecked by default).
20) Click on Save to generate the Evaluation result report. Saving all the entered report selections will create an Evaluation result report.
21) Click on the download icon to download the report.
22) 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.

Creating Evaluation Results on the Course Edit Page:

1) Go to Admin.

2) Click on Content.
3) Click on Find and edit existing content.
4) Search for course ID number or course name.
5) Select course.
6) Click on Edit on the right-hand side.
7) Click on roster.
8) For live events, click on sessions.
9) Go to tools drop-down.
10) Click on Evaluation results from the tools drop-down. Clicking on the Evaluation result report will direct to the edit report page.
11) Choose a Date range for the Evaluation result report—the date range will filter report output by the completion date of Evaluation records.
    a) Fixed date (Start date and end date).
    b) Last week.
    c) Last month.
12) 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.
13) Select Summary View or Participants View for desired report mode.
14) Click on search course by course ID or course name on the right-hand side under the course section to search for courses.
15) 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 selected course name. Course selection is required. The search bar will show courses available to the admin via the Report Manager or Course Provider roles.
16) Search for an evaluation by its ID number or evaluation name under the Evaluation section of the page. Evaluations available for the course will be presented by default after selecting the course.
17) Click on the green add (+) icon to select Evaluation. Selected Evaluation can be removed by clicking on the remove red(x) icon in front of the Evaluation name. Evaluation selection is required. Multiple evaluations can be selected for the report.
18) Click on Advanced Options to expand the group selection options for Evaluation results.
19) 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.
20) Click on the tree view option to expand and view the group's full structure

21) 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.
22) Select reporting setting choice, if applicable.
23) Include administrators (checked by default).
24) Include inactive (closed) user accounts (unchecked by default).
25) 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.
26) 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.

Edit Evaluation Results Report:

1) Go to Admin.
2) Click on Reports.
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5) 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 in order to create a new report.
6) Click on Save after making an edit to the existing report selection.
7) Click on Save to generate the report.
8) Click on the Download icon to download the report.
9) Click on Refresh to refresh the generated status of the report.
10) Click on the Download icon to download the report again.