

**Job Aid: Follow-up Evaluation Survey**

**Course: Training Evaluations**

Lab 7: Configure Options for Draft Survey: Follow-up Evaluation

Lab 8: Configure APM

**Prerequisites**

- Introduction to LearningLink Administration
- Learning Needs Management
- Online Content Management

**Description**

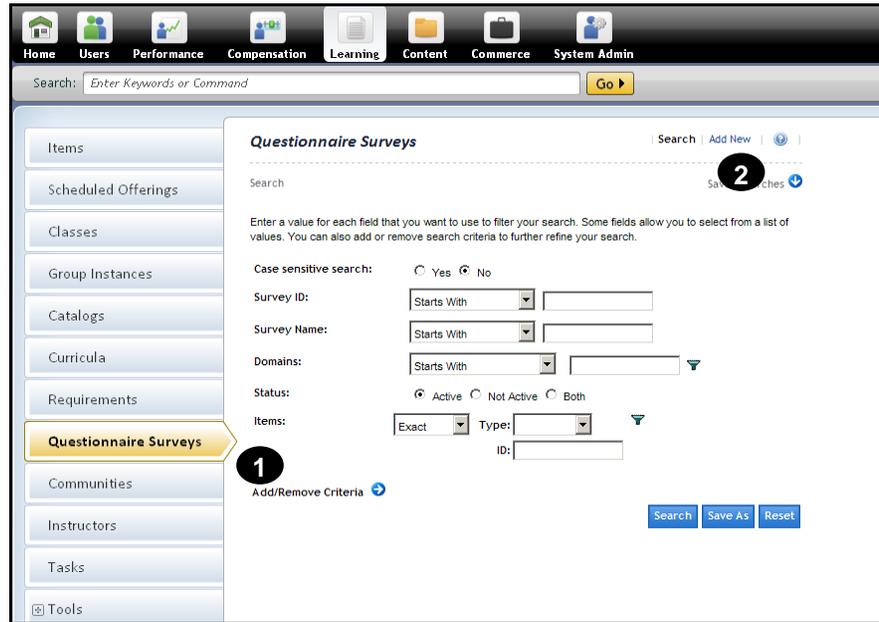
The purpose of this job aid is to guide administrators through the step-by-step process of creating a follow-up evaluation survey.

**Tasks**

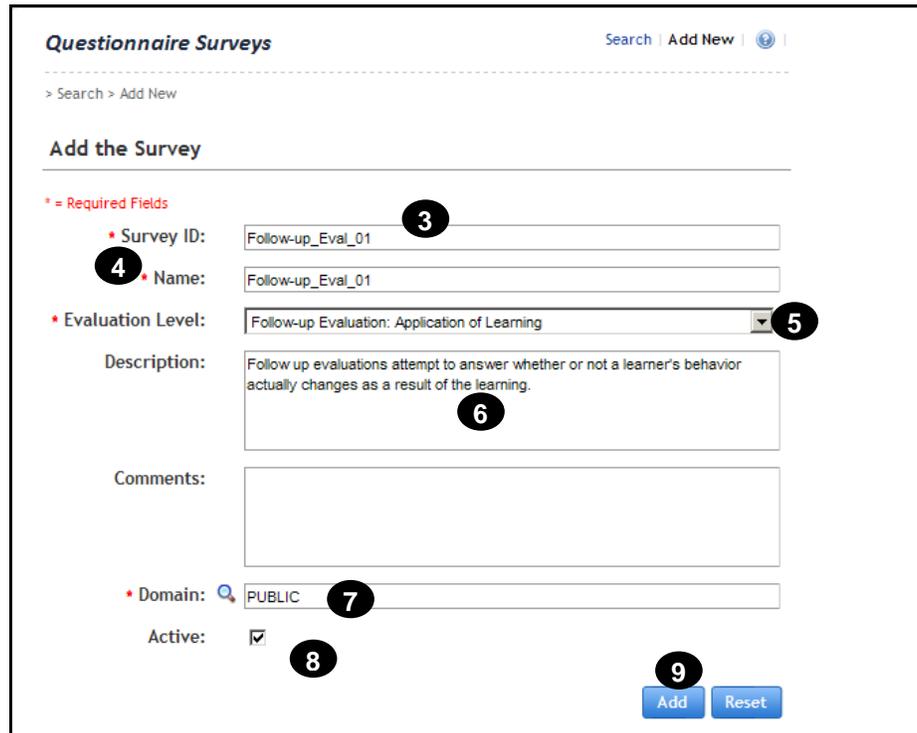
- A. Create Draft Survey
- B. Add Questions
- C. Configure Options and Notifications
- D. Preview and Publish Survey
- E. Associate Survey with Item
- F. Associate Item with Survey
- G. Configure APM

### Task A. Create Draft Survey

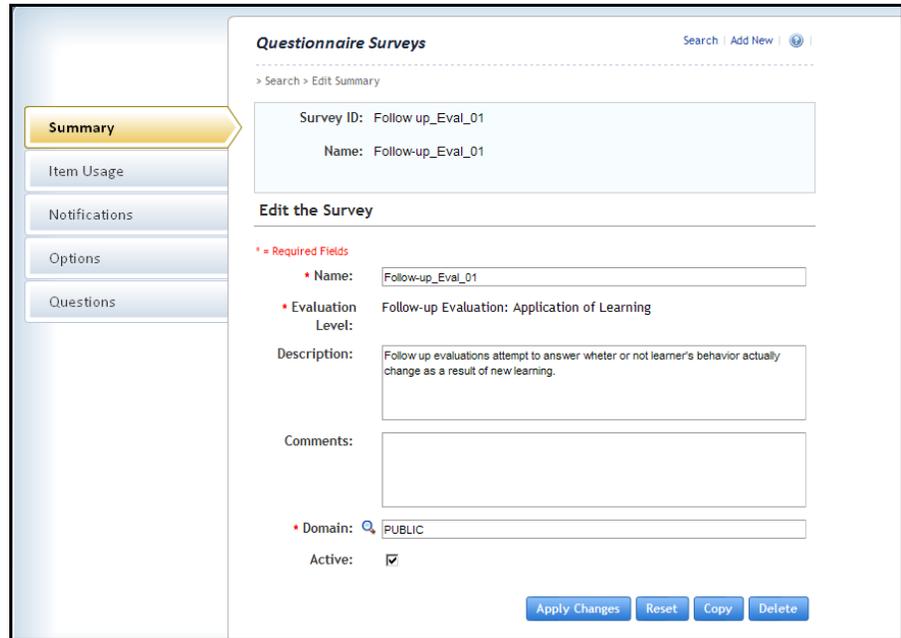
- 1 Verify the Admin tab is selected.
- 1 Navigate to Learning > Questionnaire Survey.
- 2 Select Add New.



- 3 Enter a survey ID.
- 4 Enter a survey name.
- 5 Select an evaluation level (for this example, select Follow-up Evaluation: Application of Learning).
- 6 Enter survey description and comments.
- 7 Select domain.
- 8 Check Active checkbox.
- 9 Select Add.



The new questionnaire survey is created.



**Questionnaire Surveys** Search | Add New | 

> Search > Edit Summary

Survey ID: Follow up\_Eval\_01  
Name: Follow-up\_Eval\_01

**Edit the Survey**

\* = Required Fields

• Name:

• Evaluation Level: Follow-up Evaluation: Application of Learning

Description:

Comments:

• Domain:

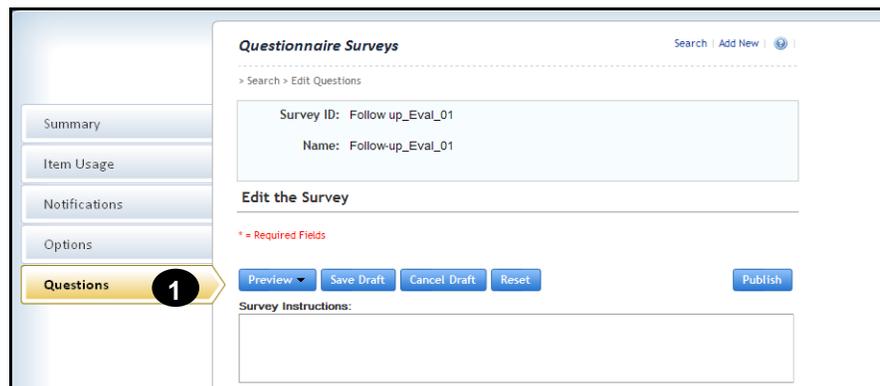
Active:

Apply Changes | Reset | Copy | Delete

## Task B. Add Questions

*Note: Follow-up evaluations attempt to answer whether or not learners' behaviors actually change as a result of new learning.*

**1** Select the **Questions** tab for the questionnaire survey previously created.



**Questionnaire Surveys** Search | Add New | 

> Search > Edit Questions

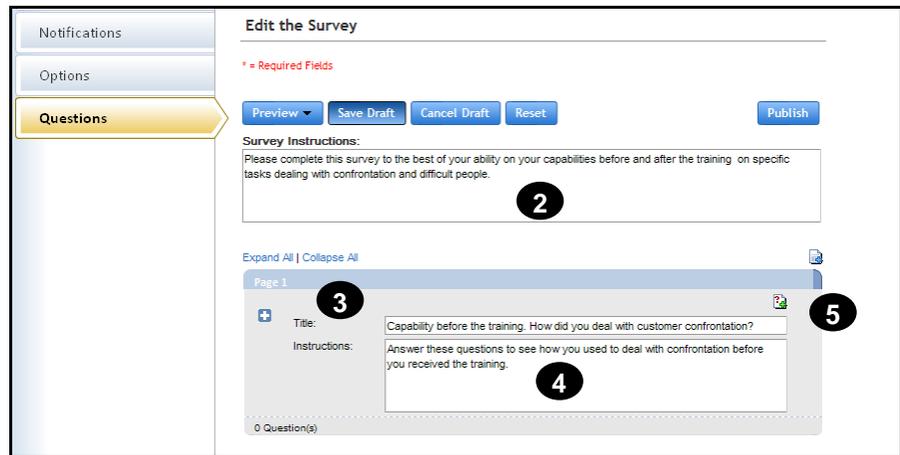
Survey ID: Follow up\_Eval\_01  
Name: Follow-up\_Eval\_01

**Edit the Survey**

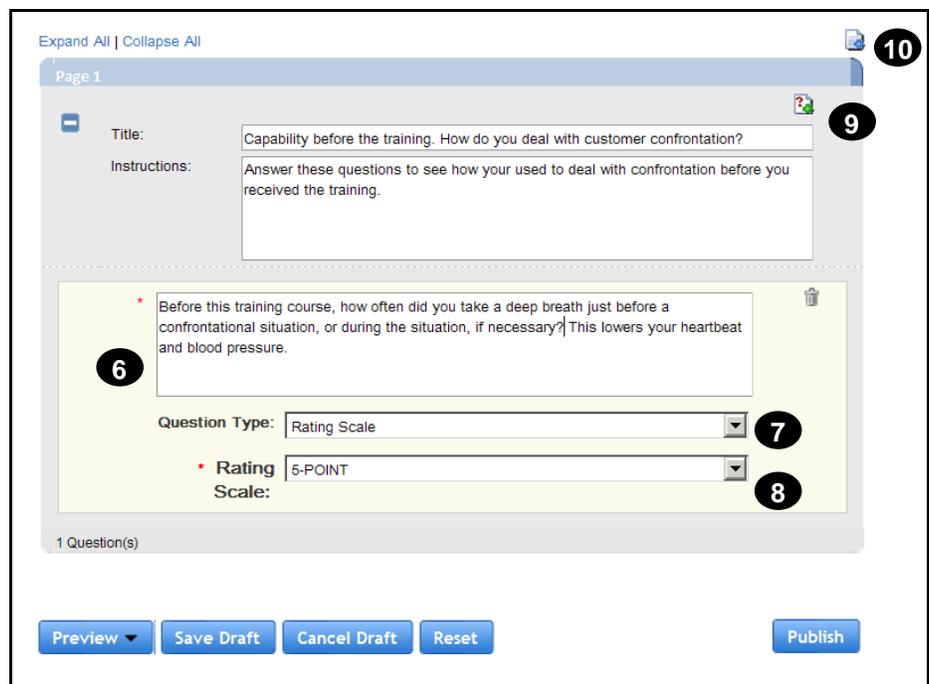
\* = Required Fields

Survey Instructions:

- 2 Enter survey instructions.
- 3 Enter first page title.
- 4 Enter first page instructions.
- 5 Select the Add Question icon (📄+).



- 6 Enter question stem.
- 7 Select question type (for this example select rating scale).
- 8 Select a rating scale.
- 9 Select Add Question icon (📄+) to add additional questions to this page.
- 10 Select Add Page icon (📄) to add an additional page.



- 11** Enter second page title and second page instructions.  
Repeat previous steps to add questions to this page.
- 12** Select **Save Draft**.

**12**

Preview Save Draft Cancel Draft Reset Publish

**Survey Instructions:**  
Please complete this survey to the best of your ability on your capabilities before and after the training on specific tasks dealing confrontation and difficult people.

Expand All | Collapse All

Page 1

+ Title: Capability before the training. How did you deal with customer confrontation?  
Instructions: Answer these questions to see how you used to deal with confrontation before you received the training.

1 Question(s)

Page 2

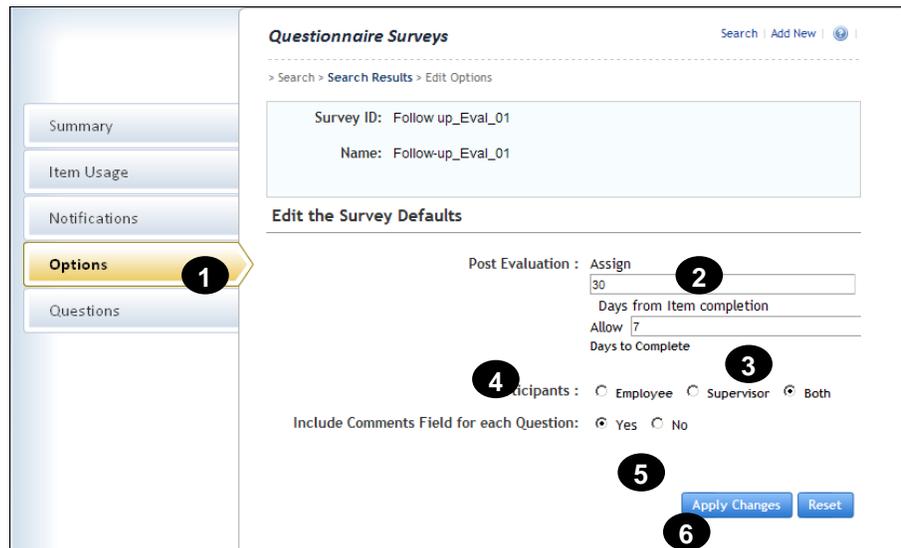
+ Title: **11**  
Instructions: **11**

0 Question(s)

Preview Save Draft **12** Cancel Draft Reset Publish

### Task C. Configure Options and Notifications

- 1 Select the **Options** tab.
- 2 To configure the post evaluation settings, enter a number of days from item completion to assign the follow-up survey, and a number of days to complete the survey.
- 3 Select the participants of the follow-up survey.
- 4 Select option to include comments field for each question.
- 5 Select **Apply Changes**.
- 6 Select **Apply Changes**.



**Questionnaire Surveys** Search | Add New |

> Search > Search Results > Edit Options

Survey ID: Follow-up\_Eval\_01  
Name: Follow-up\_Eval\_01

**Edit the Survey Defaults**

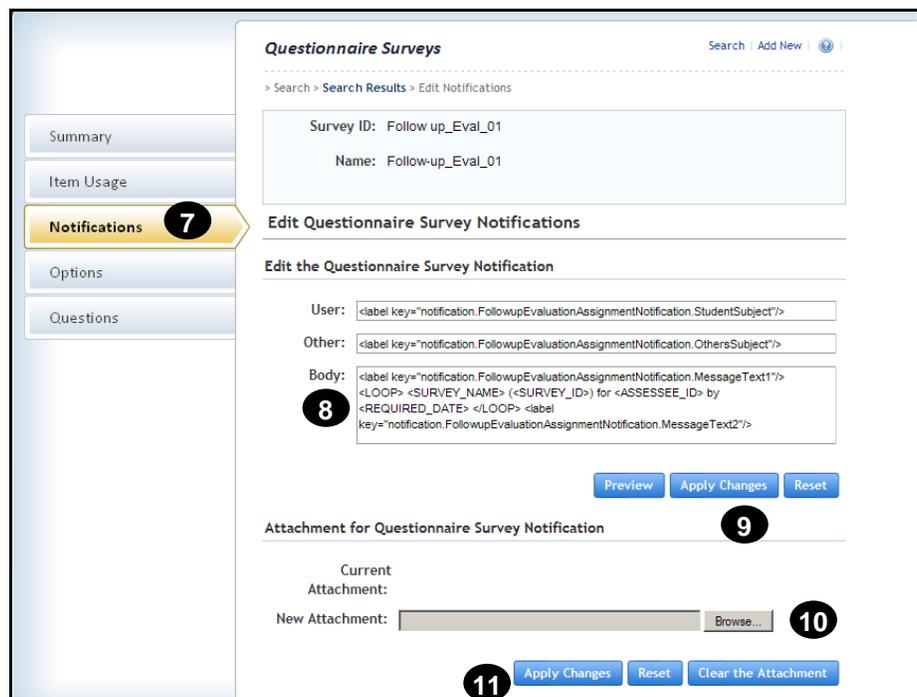
Post Evaluation : Assign **2**  
30  
Days from Item completion  
Allow 7  
Days to Complete **3**

**4** Participants :  Employee  Supervisor  Both

Include Comments Field for each Question:  Yes  No **5**

**6** Apply Changes Reset

- 7 Select the **Notifications** tab.
- 8 If necessary, edit body of notification message.
- 9 Select **Apply Changes**.
- 10 If necessary, click **Browse** to add an attachment to notification.
- 11 Select **Apply Changes**.



**Questionnaire Surveys** Search | Add New |

> Search > Search Results > Edit Notifications

Survey ID: Follow-up\_Eval\_01  
Name: Follow-up\_Eval\_01

**Edit Questionnaire Survey Notifications**

**Edit the Questionnaire Survey Notification**

User: <label key="notification.FollowupEvaluationAssignmentNotification.StudentSubject"/>  
Other: <label key="notification.FollowupEvaluationAssignmentNotification.OthersSubject"/>  
Body: **8**  
<label key="notification.FollowupEvaluationAssignmentNotification.MessageText1"/>  
<LOOP> <SURVEY\_NAME> (<SURVEY\_ID>) for <ASSEESSE\_ID> by  
<REQUIRED\_DATE> <LOOP> <label  
key="notification.FollowupEvaluationAssignmentNotification.MessageText2"/>

Preview Apply Changes Reset

**Attachment for Questionnaire Survey Notification** **9**

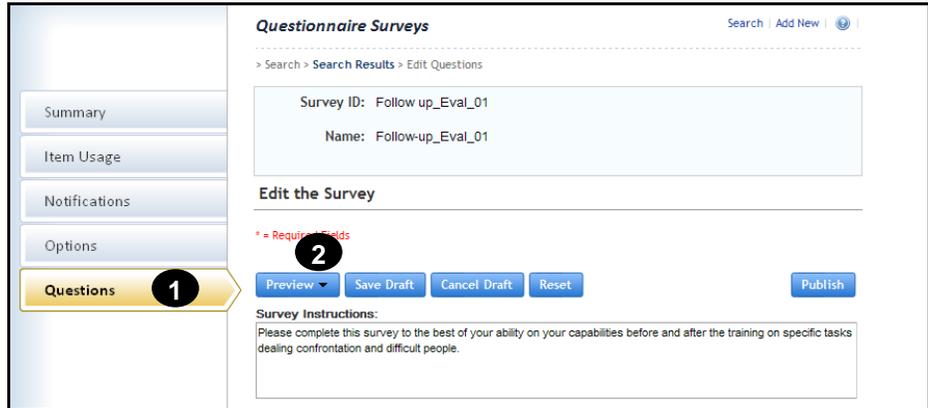
Current Attachment:  
New Attachment:  Browse... **10**

**11** Apply Changes Reset Clear the Attachment

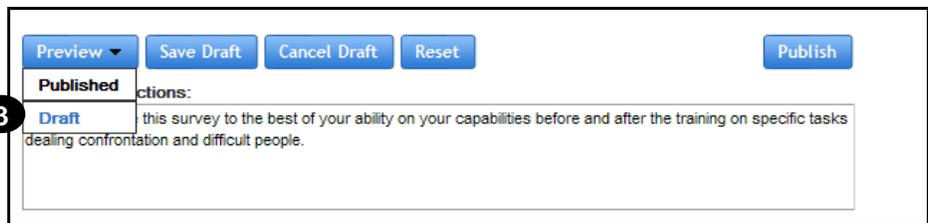
### Task D. Preview and Publish Survey

**1** Select the Questions tab.

**2** Select Preview.

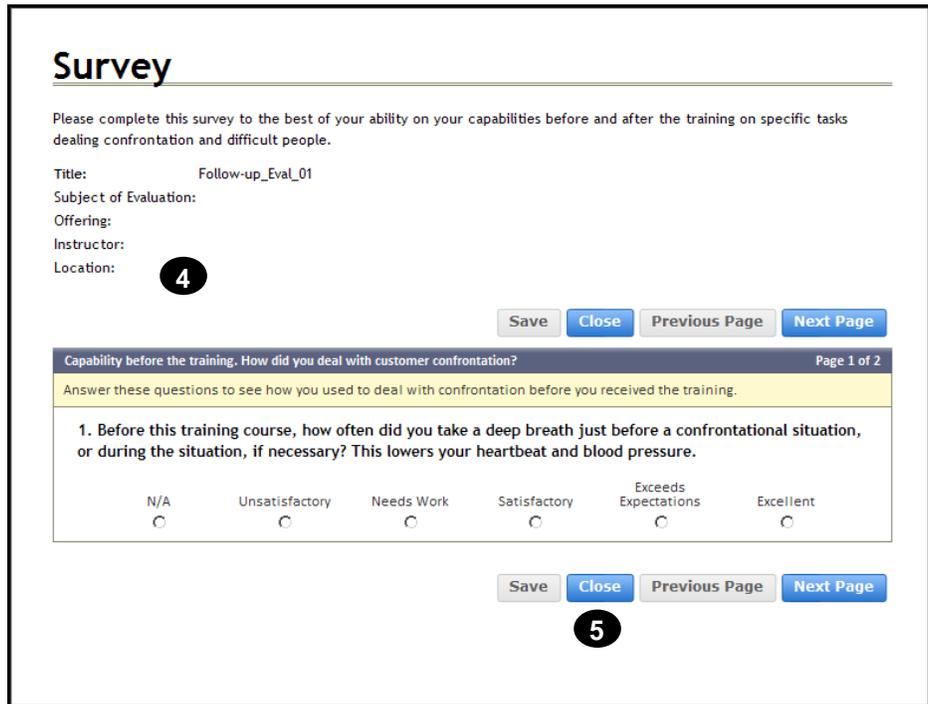


**3** Select Draft from drop-down menu.

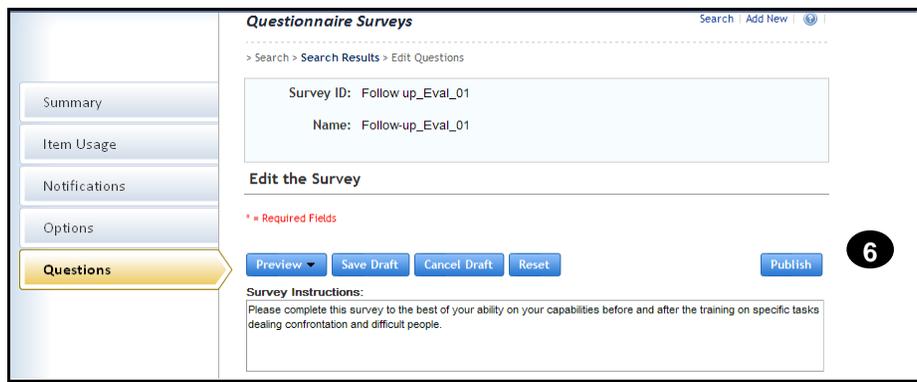


**4** Review preview of survey.

**5** Select Close to close preview of survey.



**6** Select **Publish**. The survey is now ready for use.



**Task E. Associate Survey with Item**

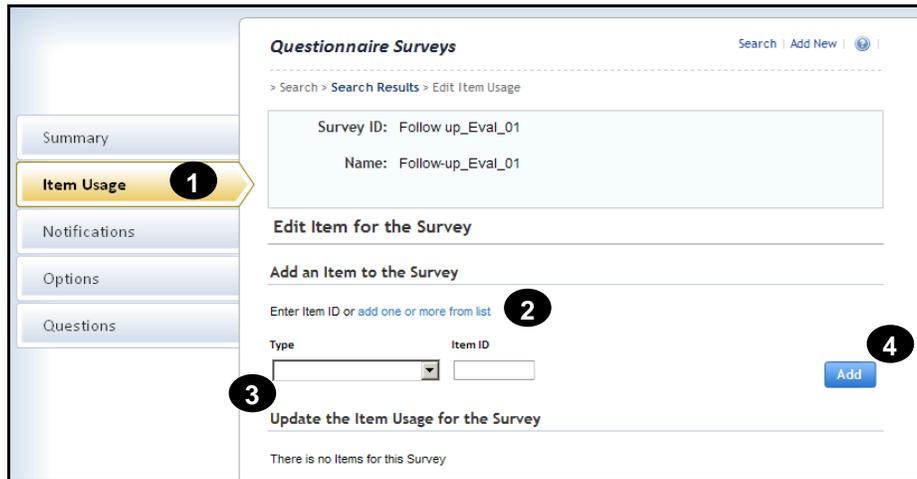
**1** Select the **Item Usage** tab.

**2** Select the **add one or more** from list link.  
Search for and select one or more items.

**or**

**3** Select item type and enter item ID exactly.

**4** Select **Add**.



**5** Review list of added items.

*Note: Once this survey is assigned, completions and mean score can be viewed for this tab.*

**Update the Item Usage for the Survey**

Run Report Remove Reset

Select All / Deselect All

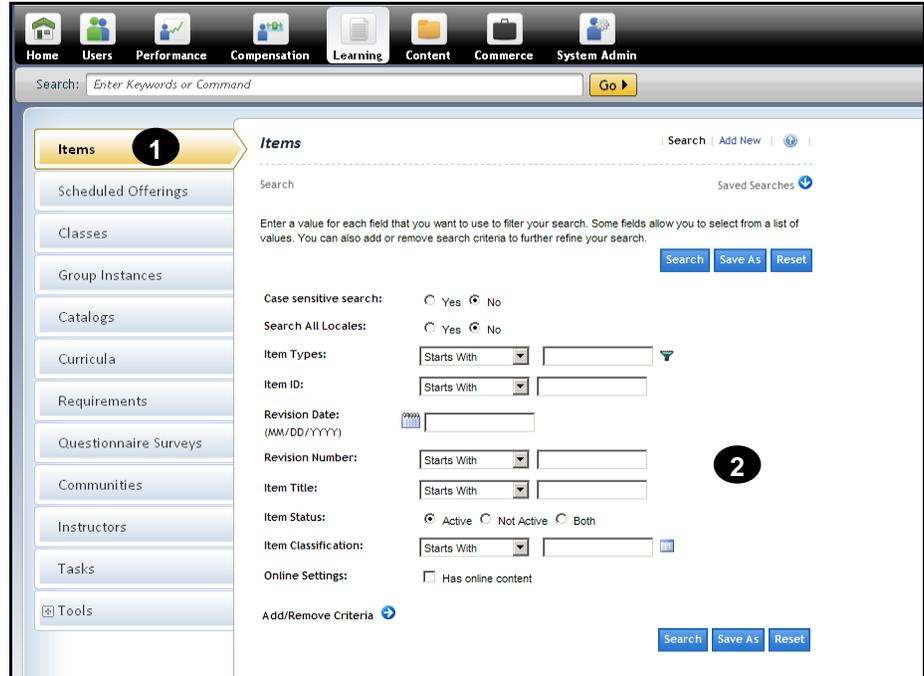
Item	Assigned	Completions	Percentage	Mean Score	Remove
COURSE COMM0515 (Rev 4 - 12/23/2004 02:38 PM America/New York)	0	0	0.00	N/A	<input type="checkbox"/>
COURSE MGMT0223 (Rev 4 - 12/23/2004 02:39 PM America/New York)	0	0	0.00	N/A	<input type="checkbox"/>
COURSE TEAM0214 (Rev 4 - 12/23/2004 02:39 PM America/New York)	0	0	0.00	N/A	<input type="checkbox"/>

Select All / Deselect All

Run Report Remove Reset

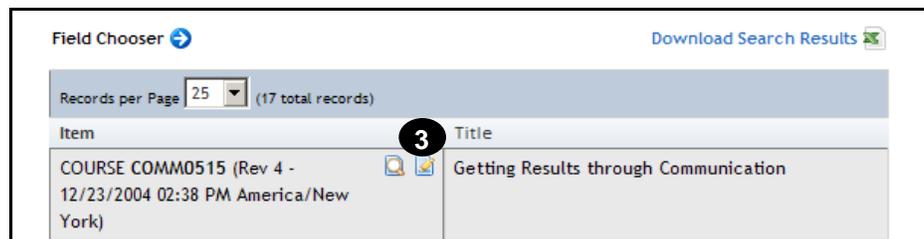
### Task F. Associate Item with Survey

- 1 Navigate to Learning > Items.
- 2 Search for an item.



The screenshot shows the LearningLink interface. At the top, there is a navigation bar with icons for Home, Users, Performance, Compensation, Learning, Content, Commerce, and System Admin. Below this is a search bar with the text "Enter Keywords or Command" and a "Go" button. The main content area is titled "Items" and includes a search form with various filters. A circled "1" is placed over the "Items" menu item in the left sidebar. A circled "2" is placed over the "Item Title" field in the search criteria section.

- 3 Select the edit icon (  ) to enter the item in edit mode.

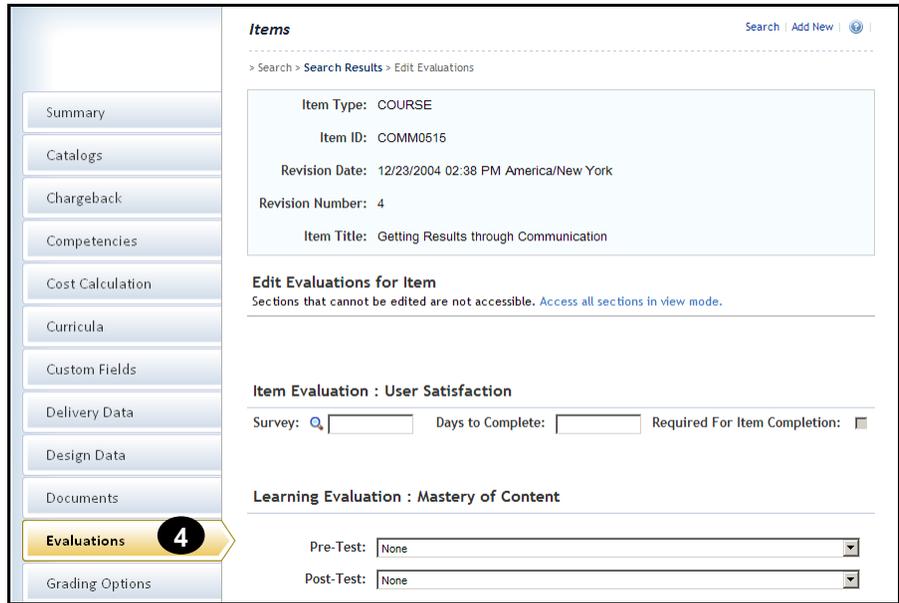


The screenshot shows the search results page. At the top, there is a "Field Chooser" and a "Download Search Results" link. Below this is a table with the following data:

Item	Title
COURSE COMM0515 (Rev 4 - 12/23/2004 02:38 PM America/New York)	Getting Results through Communication

A circled "3" is placed over the edit icon (a small document with a pencil) next to the first record in the table.

**4** Select the Evaluations tab.



**Items** Search | Add New |

> Search > Search Results > Edit Evaluations

Summary  
Catalogs  
Chargeback  
Competencies  
Cost Calculation  
Curricula  
Custom Fields  
Delivery Data  
Design Data  
Documents  
**Evaluations 4**  
Grading Options

Item Type: COURSE  
Item ID: COMM0515  
Revision Date: 12/23/2004 02:38 PM America/New York  
Revision Number: 4  
Item Title: Getting Results through Communication

**Edit Evaluations for Item**  
Sections that cannot be edited are not accessible. [Access all sections in view mode.](#)

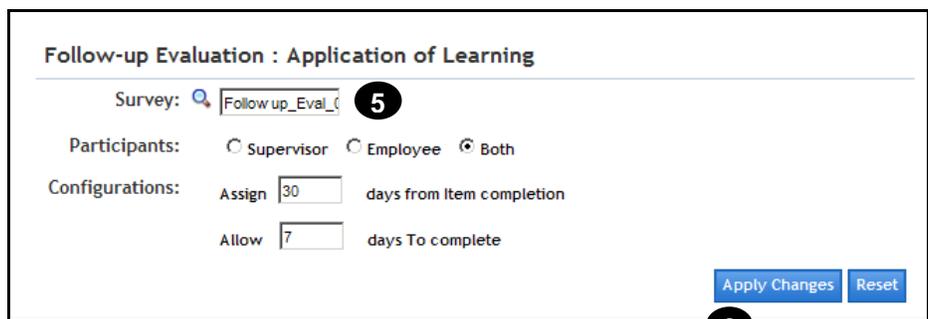
**Item Evaluation : User Satisfaction**  
Survey:  Days to Complete:  Required For Item Completion:

**Learning Evaluation : Mastery of Content**  
Pre-Test:  None  
Post-Test:  None

**5** In the Follow-up Evaluation: Application of Learning section, select the search icon (🔍) to search for and select a questionnaire survey.

**6** Select Apply Changes.

*Note: Depending on how the survey was configured, the Participants field and the assignment configurations may or may not be auto-filled once the survey is added. If necessary, change these fields.*



**Follow-up Evaluation : Application of Learning**

Survey:  Follow up\_Eval\_0 **5**

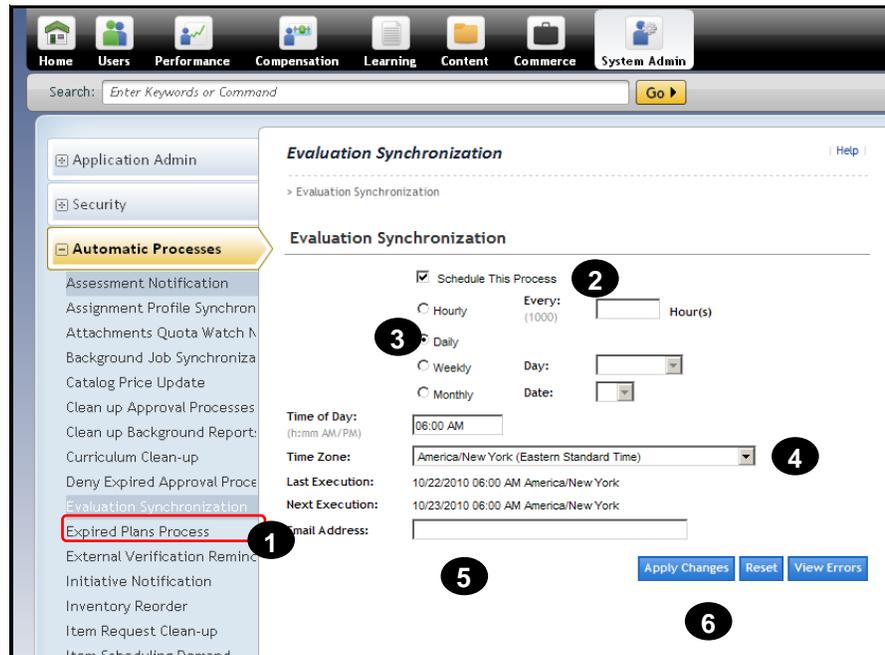
Participants:  Supervisor  Employee  Both

Configurations: Assign  30 days from Item completion  
Allow  7 days To complete

**6**

## Task G. Configure APM

- 1 Navigate to System Admin > Automatic Processes > Evaluation Synchronization.
- 2 Enable this process to be scheduled.
- 3 Select frequency of synchronization, and enter configuration options.
- 4 Select a time-zone.
- 5 Enter an email address for notification.
- 6 Select Apply Changes.



The screenshot shows the 'Evaluation Synchronization' configuration page in the LearningLink System Admin interface. The page is titled 'Evaluation Synchronization' and includes a search bar at the top. The left sidebar contains a navigation menu with 'Automatic Processes' selected. The main content area shows the following configuration options:

- Schedule This Process (2)
- Hourly Every:  Hour(s)
- Daily (3)
- Weekly Day:
- Monthly Date:
- Time of Day:
- Time Zone:  (4)
- Last Execution: 10/22/2010 06:00 AM America/New York
- Next Execution: 10/23/2010 06:00 AM America/New York
- Email Address:  (5)

At the bottom of the configuration area, there are three buttons: 'Apply Changes', 'Reset', and 'View Errors'. The 'Apply Changes' button is highlighted with a circled '6'.



Notes