

TrueOutcomes Assessment Manager

User Guide for Assessment and Program Coordinators

RELEASE 2.0



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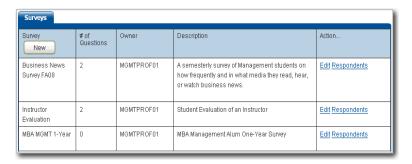
1 Working with Surveys

From time to time you may wish to survey students, alumni, colleagues, or other stakeholders in your discipline on some topic. Assessment Manager provides you with readymade tools for doing this. Data collected in surveys can then be analyzed.

Reviewing Surveys in the TrueOutcomes Library

To view or edit an existing survey:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see a table of surveys.
- 3 Click Edit in the *Action* cell for the survey you want to work with. You see the Survey Manager task screen open on the **Author** tab.
- 4 Optionally review the Schedule and Scales for the survey.
- 5 Optionally edit *label text* in the Author, Schedule, or Scales tabs (see Caution opposite).
- 6 When you have finished reviewing, click Return to TrueOutcomes in the global navigation top bar. You are returned to the Surveys Library.



Part of a Surveys Library

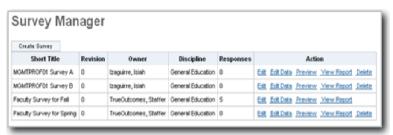


CAUTION: With already completed surveys, the **Edit** tools in Survey Manager should be used sparingly. Changing the structure of the survey or scales can cause errors. To avoid errors, make only minor textual changes to the survey and scales.

Reviewing Surveys in the Survey Manager

To view surveys and perform additional survey functions:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see a table of surveys.
- 3 Click the New button in the Survey column header of the table. You see the Create Survey page in Survey Manager open on the Author tab.
- 4 In the Surveys drop-down menu at the top of the page, select Manage Surveys.
- 5 Optionally, on this page you can:
 - Edit the survey
 - · Edit survey data
 - Preview the survey
 - View the survey data report; or
 - Delete the survey.
- 6 When you have finished with this page, click Return to TrueOutcomes in the global navigation top bar. You are returned to the Surveys Library.



The Survey Manager table



NOTE: Assessment Coordinators and System Administrators can view all surveys in their institution in the TrueOutcomes Library and in the Survey Manager. Program Coordinators, Course Coordinators, and Instructors will only see surveys they themselves have created when they log in and view these lists.



CAUTION: Edit Data in Survey Manager allows you to alter any data in survey reports, but it is an advanced function and can cause problems if used incorrectly. Please contact TrueOutcomes staff if you want to use it.

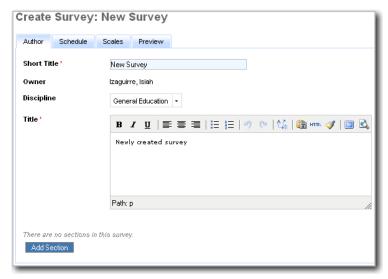
Creating a New Survey

To define a new survey:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see the table of surveys.
- 3 In the label bar in the Surveys title column, click the New button. You are taken to Survey Manager open on the Author tab.
- 4 Enter a **Short Title** for your survey (for example, "Business News FA08') in the text box.
- 5 Use the drop-down **Discipline** tree to select the discipline to designate the respondents of your survey.
- 6 Use the editing task pane to enter and format a Title (more of a descriptive phrase) for your survey.

To create sections for your survey:

- 1 Click the Add Section button to begin defining a question for your survey. You see the Section task panes.
- 2 Enter a Title for the section in the text box.
- 3 Optionally enter **Directions** for that section in the editing task pane.
- 4 Optionally click the Save Section button to add the section to your survey if you don't want to start adding questions at that moment.



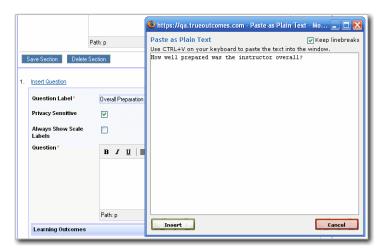
The New Survey Author tab showing default text



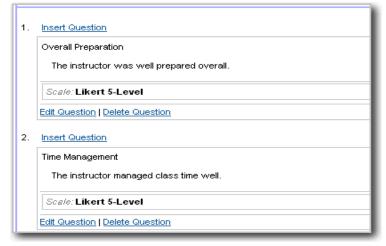
The Section Definition task area

To create questions within a section of your survey:

- 1 Click the Insert Question link. You see the Question Definition task area open below the Section Definition area.
- 2 Enter a Label for your question (for example, "Frequency" or Approval") in the text box.
- 3 Optionally check or uncheck the Privacy Sensitive and Always Show Scale Labels boxes.
- 4 Enter your Question in the editing task pane, or:
- 5 Optionally paste your question from another file. You invoke the Paste as Plain Text popup window, where you can paste your question text and click Insert to have it appear in the editing task pane for further editing and formatting.
- 6 Select a Scale from the drop-down menu. (NOTE: Until you have created your own new *local scales* for your survey, the only scales available to you from the menu are Generic Scales. See Creating a Scale from Scratch, p. 7)
- 7 Click the Save Question button to add your question to the section.
- 8 Repeat steps 1-8 until your section is completed.
- 9 Click the Save Section button to add your section to the survey.



The Question Definition task area, showing the Paste as Plain Text popup window

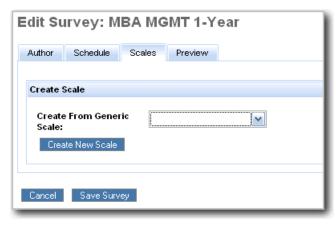


Questions saved in a Section using a Generic Scale

Creating a Survey Scale

To begin creating or adapting a new scale:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see the table of surveys.
- 3 In the label bar in the Surveys title column, click the New button. You are taken to Survey Manager open on the Author tab.
- 4 Click the Scales tab. You see the Scales task screen with a table of any already developed local scales for this survey and a Create Scale pane.

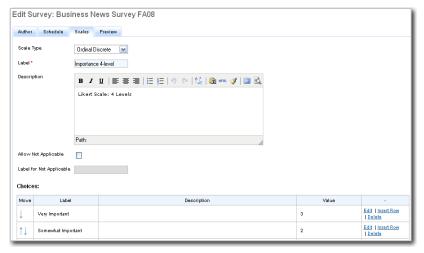


The Create Scale Task Pane

Adapting Generic Scales

To create a new scale from a generic scale:

- 1 Select a **Generic Scale** from the drop-down menu in the Create Scale pane.
- 2 Click the Create New Scale button.
- 3 Follow the steps for your selected **Scale Type** in <u>Creating a New Scale from Scratch</u>, below.
- 4 Click the Save Scale button to add your adapted scale to the Local Scales for your survey.



Adapting a Generic Scale (Likert 4-level)

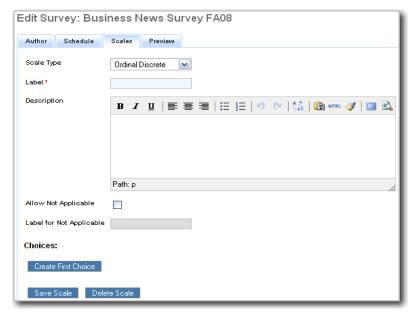
Creating a New Scale from Scratch

Designing an Ordinal Discrete Scale

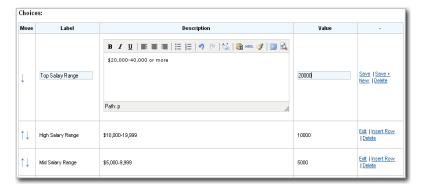
An Ordinal Discrete Scale has a fixed number of responses (levels). Each level has a relative value so that there is an order from "best" to "worst" response. The *Likert* ("Strongly Agree"— "Strongly Disagree") scale is an Ordinal Discrete scale. So is a scale of *numeric ranges* such as "\$2000-4,000"—"\$1,000-5,000."

To create an Ordinal Discrete scale:

- 1 Click the Create New Scale button. You see the New Scale task pane open with Ordinal Discrete selected in the Scale Type drop-down menu.
- 2 Enter a Label (short title) for your scale in the text box.
- 3 Optionally enter a **Description** in the text editing task pane.
- 4 Optionally:
 - Check the box to Allow Not Applicable
 - Enter a new Label for Not Applicable
- 5 Click the Create First Choice button to begin setting scale responses. You see the Choice Definition task area.
- 6 Enter a Label (choice name) in the text box.
- 7 Optionally enter a **Description** in the task pane.
- 8 Optionally enter a numeric Value in the text box if you are creating a "bin" or "range" choice.
- 9 Click the Save + New link in the rightmost column to save your choice and begin creating the next one.
- 10 Follow steps 2-8 for the remaining choices in your scale.
- 11 Click the Save Scale button when you are done.



The New Scale tab for Ordinal Discrete Scale



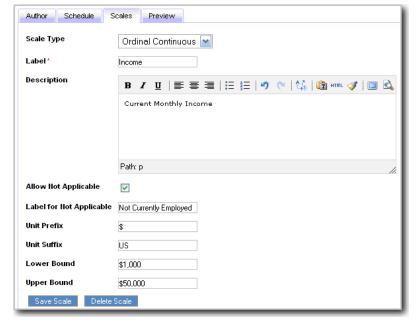
A partly completed numeric Ordinal Discrete Scale

Designing an Ordinal Continuous Scale

An Ordinal Continuous Scale is always numeric and has as many possible responses as the range parameters will allow (for example, top figure 100,000, maximum two decimal points). *Annual salary* is an example of a continuous scale. The scale has an inherent order from lesser to greater or vice versa. **NOTE**: It is often desirable to convert a continuous scale to a discrete scale by creating "bins" or "ranges" (see above regarding numeric ordinal discrete scales).

To create an Ordinal Continuous scale:

- 1 Select Ordinal Continuous in the Scale Type drop-down menu.
- 2 Enter a Label (short title) for your scale in the text box.
- 3 Optionally enter a **Description** in the text editing task pane.
- 4 Optionally:
 - Check the box to Allow Not Applicable
 - Enter a new Label for Not Applicable
- 5 Optionally enter a Unit Prefix (such as "\$") and/or a Unit Suffix (such as "US") in the respective text boxes.
- 6 Enter a Lower Bound and an Upper Bound for your range in the respective text boxes.
- 7 Optionally enter a numeric Value in the text box if you are creating a "bin" or "range" choice.
- 8 Click the Save Scale button when you are done.



A completed Ordinal Continuous Scale

Designing a Nominal Discrete Scale

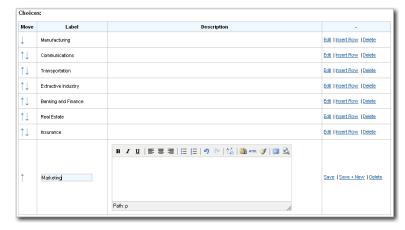
A Nominal Scale is always discrete; the choices in the scale do not carry value relative to each other. For example, a scale asking about a person's *gender* (Male, Female, Other) is nominal. *Zip code* is an example of a numerical nominal scale. We do not compute statistics (mean, standard deviation, etc.) on data tied to a nominal scale.

To create a Nominal Discrete scale:

- 1 Select Nominal Discrete in the Scale Type drop-down menu.
- 2 Enter a Label (short title) for your scale in the text box.
- 3 Optionally enter a **Description** in the text editing task pane.
- 4 Optionally:
 - Check the box to Allow Not Applicable
 - Enter a new Label for Not Applicable

5 Optionally:

- Check the box to Allow Text Response
- Enter a new Label for Text Response
- 6 Click the First Choice button to begin setting scale responses. You see the Choice Definition task area.
- 7 Enter a Label for your choice in the text box.
- 8 Optionally enter a **Description** in the text editing task pane.
- 9 Click the Save + New link in the rightmost column to save your choice and begin creating the next one.
- 10 Follow steps 2-8 for the remaining choices.
- 11 Click the Save Scale button when you are done.



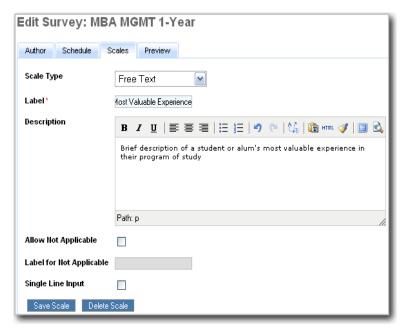
A nearly completed Nominal Scale

Designing a Free Text (Constructed Response) Scale

A Constructed Response Scale is just a text box in which a responder can enter a response to an open-ended question. The Survey Manager includes them as a type of scale because they collect the response to a question.

To create a Free Text (Constructed Response) scale:

- 1 Select Free Text in the Scale Type drop-down menu.
- 2 Enter a Label (short title) for your scale in the text box.
- 3 Optionally enter a **Description** (the subject matter you want respondents to write about) in the text editing task pane.
- 4 Optionally:
 - Check the box to Allow Not Applicable
 - Enter a new Label for Not Applicable
- 5 Optionally check the box for Single Line Input. This is used when soliciting shorter responses.
- 6 Click the Save Scale button when you are done.



A completed Free Text (Constructed Response) Scale

Scheduling A Survey

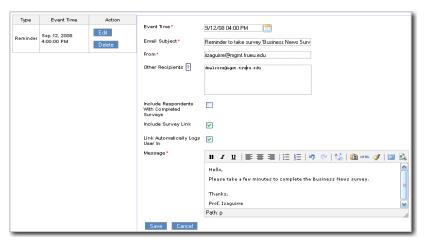
Surveys, in this version of TrueOutcomes, are distributed in somewhat different ways according to responder type. However, all of them require an Open Date (when they become available to respondents) and a Close Date (when they cease to be available). Also, you can send your respondents Reminder emails containing a link to the survey and also send Status Reports on the survey to an interested party or parties such as members of a faculty committee or an administrator.

To schedule your survey and any reminders or status reports:

- 1 Click the **Schedule** tab in the **New Survey** task screen.
- 2 Use the drop-down calendars to select an Open Date and a Close Date for your survey:
 - Use the < > controls to move back or forward by *month* and the << >> controls to go back or forward by *year*
 - Optionally click Today to make it the Open or Close date
 - Optionally click Clean to delete your settings in the open calendar and start over
 - Click X to collapse the calendar and save your settings.
- 3 Optionally select Reminder or Status Update in the dropdown Event menu.
- 4 Click Add New Event. You see the New Event task area open below the Dates area.
- 5 Use the drop-down Event Time calendar to set a date and time for your Reminder or Update to be sent.



The Survey Scheduling tab, showing the dropdown Open Date calendar



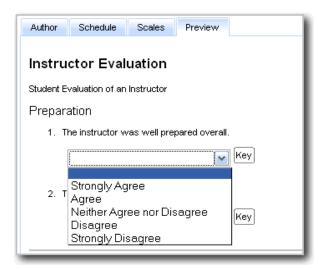
The New Event (Reminder or Status Message) task area, showing edited message

- 6 For a Reminder, enter a subject line, the "From" email address, and the addresses of the reminder recipients. Also check or uncheck boxes to Include Respondents With Completed Surveys and Include Survey Link, and check or uncheck Link Automatically Logs User In.
- 7 For a Status Update, check or uncheck the box to insert a Link to Survey Results in your message.
- 8 Optionally edit the generic Message alert that appears in the editing task pane: either "This is your 1st status message for the survey titled '[Your Survey]'" or "This is your 1st reminder message to answer the survey titled '[Your Survey]'."
- **9** Click the **Save** button to add the message event to your survey.

Previewing a Survey

To preview your new or edited survey:

- 1 Click the Preview tab in the New Survey task screen. You see your Title, Description, and Questions.
- 2 Pull down the menu for any Question to review the Scale as respondents will see it, or:
- 3 Click the **Key** button for any question to view the **Generic Scale** you used, with **Descriptions** (if any) of each value in the scale.
- 4 Click the Save Survey button if you have made changes, otherwise click the Cancel button. You are returned to the Surveys Library.



The Survey Preview tab, showing Question Scale drop-down (Generic Scale)

Distributing Surveys

To distribute any survey:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see the table of surveys.
- 3 Click the Respondents link in the Action cell for the survey you want to distribute. You see the Distribution task screen for your survey.
- 4 Follow the steps for the **Responder Type** you select (see below).

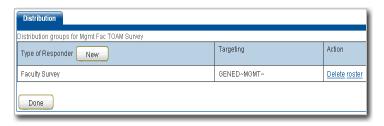
Setting Survey Responder Groups

Setting Up a Student Responder Group

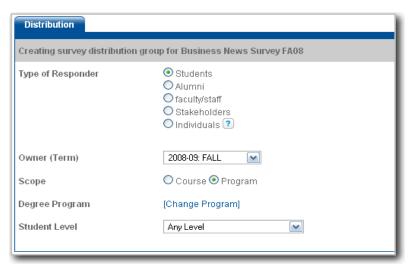
The default setting for student responder groups is *all students in the discipline*. However, you can narrow the group to *a program within your discipline* or to *individual courses or groups of courses*. Within discipline or program, you can also select students by *level* (Freshman, Sophomore, etc.)

To begin setting up a student group:

- 1 Click the New button in the Type of Responder bar. You see the Responder Type selection pane.
- 2 Click the Students radio button in the Responder Type pane.
- 3 Select a term in the Owner (Term) drop-down menu (the default is the current term).



The Survey Distribution Task Screen



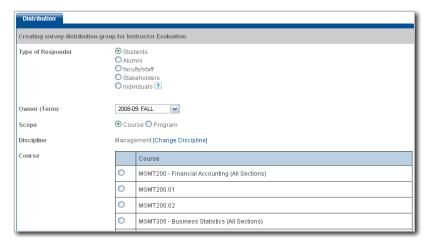
The Responder Type Definition screen showing the default (Students by Program)

To set up a Program student group within your discipline:

- 1 Click the radio button for **Program**.
- 2 Click the Change Program link to set a program. You see the Program drop-down tree for your discipline.
- 3 Select the program whose students you want to survey and click **Done** to collapse the tree.
- 4 Optionally select the **Student Level** you want to survey in the drop-down menu (the default is **Any Level**).
- 5 Click the **Submit** button to distribute the survey to the group. You are returned to the Surveys library.
- 6 Optionally click the New Distribution link in the Distribution task pane to set a new responder group.

To set up a Course student group within your discipline:

- 1 Click the radio button for Course.
- 2 Click the Change Discipline link to set a discipline or subdiscipline. You see the Discipline List drop-down tree for your institution.
- 3 Select the discipline for the courses whose students you want to survey and click **Done** to collapse the tree. You see a **Course and Section List** for the discipline you have selected.
- 4 Optionally click another Course Number link at the bottom to view the next page of the Course and Section List.
- 5 Select the Master Course or Section whose students you want to survey by clicking its radio button. (If you select a Master Course, the survey is distributed to all its sections.)
- 6 Click the **Submit** button. You are returned to the Surveys library.
- 7 Optionally click the New Distribution link in the Distribution task pane to set a new responder group.

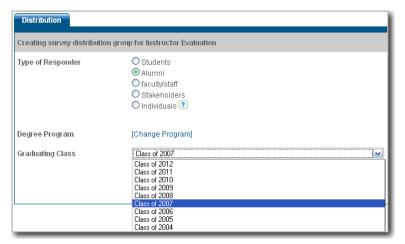


The Responder Type Definition screen for Students by Course, showing part of the drop-down Course list

Setting Up an Alumni Responder Group

To begin setting up an alumni group:

- 1 Click the New button in the Type of Responder bar. You see the Responder Type selection pane.
- 2 Click the Alumni radio button in the Responder Type pane.
- 3 Optionally click the Change Program link. You see the Program List drop-down tree for your discipline.
- 4 Select the program whose alumni you want to survey and click **Done** to collapse the tree.
- 5 Select the **Graduating Class** you want to survey in the drop-down menu. (The default is the current Freshman class.)
- 6 Select a term in the Owner (Term) drop-down menu (the default is the current term).
- 7 Click the **Submit** button. You are returned to the Surveys library.
- 8 Optionally click the **New Distribution** link in the **Distribution** task pane to set a new responder group.



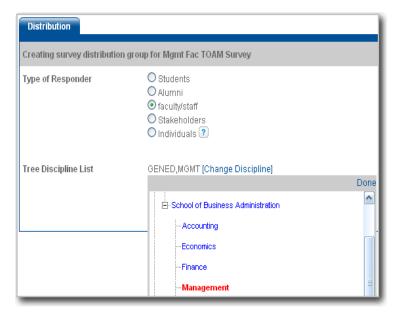
The Responder Type Definition screen for Alumni, showing the drop-down Graduating Class menu

Setting Up a Faculty-Staff Responder Group

NOTE: Survey Manager does not allow you to separate Faculty from Staff. If non-instructor staff members are in the Faculty-Staff user database in Assessment Manager, they will be included in your survey distribution group. (TrueOutcomes assumes that persons listed as "Staff" in the user database are academic administrators who are concerned in some way with assessment.)

To set up a Faculty-Staff group:

- 1 Click the New button in the Type of Responder bar. You see the Responder Type selection pane.
- 2 Click the faculty/staff radio button in the Responder Type pane.
- 3 Click the Change Discipline link to set a discipline or subdiscipline. You see the Discipline List drop-down tree for your institution.
- 4 Select the discipline for the courses whose faculty and staff you want to survey and click **Done** to collapse the tree.
- 5 Click the Submit. You are returned to the Surveys library.
- 6 Optionally click the New Distribution link in the Distribution task pane to set a new responder group.



The Responder Type Definition screen for Faculty and Staff, showing the drop-down Discipline tree

Setting Up a Stakeholder Responder Group

To be included in surveys, stakeholders must first be entered by the Assessment Coordinator in the Assessment Manager user database. These entries include the same information fields as any other user, and Assessment Manager assigns them a pseudocollege ID and login credentials. Stakeholder groups ("Organizations") are defined in advance in the user database. You may only select from these predefined groups. If you need a new stakeholder group defined, contact the Assessment Coordinator.

To set up a Stakeholder group:

- 1 Click the New button in the Type of Responder bar. You see the Responder Type selection pane.
- 2 Click the Stakeholders radio button in the Responder Type pane. You see a list of Organizations. (NOTE: This version of Survey Manager does not support any other Stakeholder scopes.)
- 3 Select an Organization by clicking its radio button.
- 4 Click the **Submit**. You are returned to the Surveys library.
- 5 Optionally click the **New Distribution** link in the **Distribution** task pane to set a new responder group.



The Responder Type Definition screen for Stakeholders

Surveying Responders as Individuals

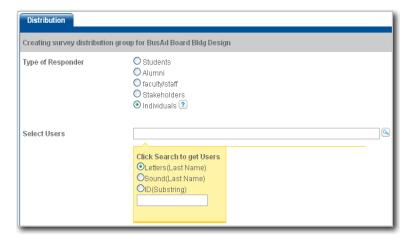
You may select any individual Assessment Manager users to survey. (NOTE: You cannot define a custom *respondent group* of uncategorized individual users in Survey Manager. Each individual must be sent the survey separately.)

To survey Individual Responders:

- 1 Click the New button in the Type of Responder bar. You see the Responder Type selection pane.
- 2 Click the **Individuals** radio button in the Responder Type pane.
- 3 Click Select Users. You see the Select User text box and drop-down Search String menu.
- 4 Optionally enter in a search string for:
 - Letters(Last Name)
 - Sound(Last Name) or
 - ID(Substring)

You see a drop-down list of Users matching that search string.

- 5 Select a user from the list by clicking on the user's name in the User List.
- **6** Click the **Submit** button. You are returned to the Surveys library.
- 7 Optionally repeat steps 1-7 to send to other individual users.

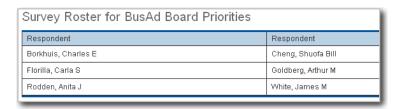


The Responder Type Definition screen for Individuals, showing the drop-down Search String menu

Viewing Distribution Rosters

To view the roster (list) of respondents for any survey you have created:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see the table of surveys.
- 3 Click the Respondents link in the Action cell for the survey you want to distribute. You see the Distribution task screen for your survey.
- 4 In the Distribution task screen, click the Roster link in the Action cell. You see the Roster pop-up window with a roster of your distribution group.
- 5 Close the popup window when you're done to return to the Distribution task screen.



A Survey Distribution Roster from the pop-up screen

Viewing Survey Reports

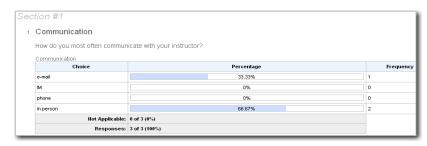
This feature allows you to view responses to your survey at any time after has been distributed. You can check response rates as well as percentages and raw numbers for each section and question. (In the same table, you can also review or delete surveys that have not yet been distributed.)

To view reports on a completed survey you have distributed:

- 1 Click Libraries in the left navigation pane.
- 2 Click the Surveys link in the drop-down Libraries list. You see the table of surveys.
- 3 Click Edit in the Action cell for the survey you want to view. You are taken to Survey Creator.
- 4 You see the **Edit Survey** task screen for your survey with a Warning in red advising caution in editing the survey.
- 5 In the top menu bar, click Surveys and select Manage Surveys in the drop-down menu. You see the Survey Manager table showing all your surveys.
- 6 In the Action cell for your survey, click View Report. You see the Survey Report screen for the survey you want to review, in the default view (horizontal bar graphs) for your response data.
- 7 Optionally check the **Show Numeric Data** box in the **Report Overview** pane to view response data as raw numbers and percentages.
- 8 Click the Return to Survey List button at lower left to return to the Survey Manager table.
- 9 Optionally review another survey or click Return to TrueOutcomes at upper right to be returned to your Surveys library.



The Survey Report Overview (bar graph view)



A Survey Section Report (numeric view)